

Core Facilities New Website Workshop

**Evanston Campus: February 5th
11:00-12:00 PM**

**Chicago Campus: February 11th
10:30-11:30 AM**



Agenda:

- Reasons for upgrading
- Website navigation
- Expectations for Managers & Directors
- Editing content on your facility's page
- Questions/feedback

Reasons for upgrading:

- Private login for core managers and NU Researchers
- More intuitive interface
- Content management system for core managers/directors
- Enhanced search options
- Version 2.0 this summer
- Feedback encouraged before V2.0 is launched.



Website Navigation:

- Website URL:
<https://www.facilities.research.northwestern.edu/>
- 3 places to login with NetID/password:
 - Management Page
 - NU Researchers
 - Login button
- Search Features:
 - Search Facilities
 - Homepage Search box

Some Facility Page Content is Login Specific

An External User (not logged-in) Will See:

- Facility Description
- Location/contact info
- Facility Category
- Website URL
- Staff
- Resources

AND the following buttons:

I am an External Customer



Send a message to the facility's manager.

I am an NU Researcher



Prompts user to login. Then redirects to "NU Researchers" page



Some Facility Page Content is Login Specific

Any logged in user will see

- Facility Description
- Location/contact info
- Facility Category
- Website URL
- Staff
- Resources

AND the following buttons:

NUCore Login



Directs to NUCore Login Page

Our NUCore Page



Directs to facility's NUCore page. Must enter url in "Internal Contact Link" field for button to appear

The Dashboard:

- Accessing the dashboard: Homepage Login button → Dashboard
- Menu items on the dashboard
 - **My Profile:** Edit your contact information
 - **My Facilities:** Select your facility to go its page and view/edit content
 - **Staff:** Staff in your facility
- **Add terms to site's pool of resources through the below menu items:**
(to add/remove a resource from your facility, see pg. 11)
 - Techniques
 - Equipment
 - Products
 - Services
 - Supplies
 - Affiliations

Menu Tabs on your page:

- Based on your user role, you will see the following menu tabs on your page:
 - **View:** If you are logged in, you will see different content than general public
 - **Edit:** Edit content on your facility's page
 - **Group:** Assign/revoke user roles (admin members only)
 - **Webform:** Create surveys and forms. Linked to the "I am an External Researcher" button (see pg. 5)
 - **Results:** View webform results



Editing your facility's page content:

- To edit your page content, you must be assigned one of the following roles:
 - **Administrator Member:** Full editing capabilities including assigning/revoking user roles via the “Group” tab.
 - **Core Employee Member:** Editing capabilities *except* for assigning/revoking user roles.



What can I edit on my page?

- Facility's Description:
 - Text box: Use “Full HTML” or “Filtered HTML” to view the toolbar and activate hyperlinks.
- Location: Enter complete, correct address
- Website URL
- Internal Contact Link URL (“My NuCore” Button)
- Images: Banner and staff
- Remove Staff (Admin Members only)

What *can* I edit on my page?

Editable fields effecting “Search Facilities” results:

- **Resources:**
 - ✓ Equipment ✓ Services ✓ Products ✓ Supplies
- **Facility Category:** Choose 1 of 9 categories
- **Techniques:** Chose 1 or more techniques
- **University Centers:** Chose a center, if applicable



What *Can't* I edit on my page?

- Adding staff (to remove staff, see pg. 14)
- Contact information for users other than yourself (each user must update his/her own information)
- Contact Leah Seiffert:
l-seiffert@northwestern.edu to add staff to your facility's page.



How to edit your contact information:

- Users may only update their own information. Leah can also make edits to users upon request.
- Login with NET ID/password
- Dashboard → My Profile → Edit Account
- “Password” field: Leave blank. Passwords default to NET ID/password
- Upload a picture or update content
- Information will display on whatever facility you are linked to



Assigning/Revoking User Roles (Admin Members only)

- Login → Page → "Group" tab → People
- Options:
 - **Deny membership:** User removed from "Facility Staff" *and* group. Editing privileges revoked. User no longer associated with facility in any way
 - **Add a role:** Assign a user administrative or membership role
 - **Do NOT Select:** *Block Membership*



Webforms:

- What is a webform?
 - Survey making module: Create customized form or survey.
 - A way for external customers to contact you
 - What guests see when they select the “I am an External Customer” tab on your page (see pg. 5)
 - **Change contact e-mail address if necessary**
 - Select “Results” tab to view submission results.



Questions/Feedback?

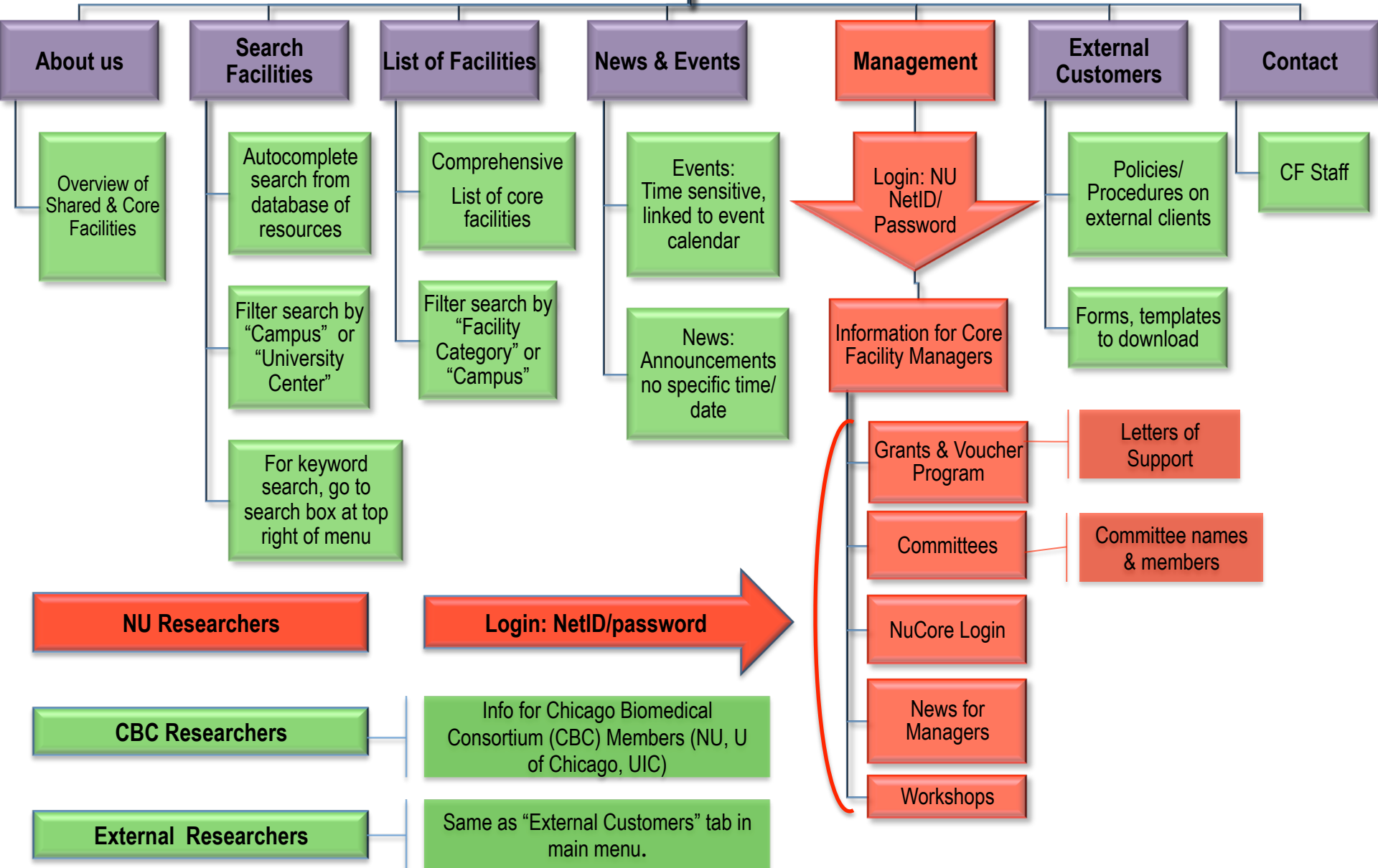
Contact Leah Seiffert

Phone: (847) 467-3794

Email: l-seiffert@northwestern.edu

Shared & Core Facilities
New Website Navigation

Home



NU Researchers

Login: NetID/password

IBC Researchers

Info for Chicago Biomedical Consortium (CBC) Members (NU, U of Chicago, UIC)

External Researchers

Same as "External Customers" tab in main menu.

Information for Core Facility Managers

Grants & Voucher Program

Letters of Support

Committees

Committee names & members

NuCore Login

News for Managers

Workshops

Shared & Core Facilities
New Website-User Roles

Alex/Developer:
V.1.0 – Jan 13'
V.2.0-Summer '13
-Add New Functions
-Edit pages not otherwise editable
by Site Managers

Site Manager: Leah and Phil only: Can create new CFs, add admins(managers), assign levels, block users, and edit most pages. Access to a comprehensive dashboard

Administrator Member: Access to all private pages. Full editing capabilities for facility's page. Can assign/revoke user roles using the "Group" tab

Core Employee: Access to all private pages. Editing capabilities for facility's page except for assigning/revoking user roles (no access to "Group" tab)

NU User: Anyone with a NU NET ID/password. Can access private pages on the website. No editing capabilities

CBC Researchers: NUCore link, guest NET ID/password. Not available until version 2.0

External Users: Guests without a NetID. No access to any private login pages (NU Researchers or Management)