

# Research Program and Project Management (RPPM) Website

## Events and Documents Management Guide

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## Introduction

The Research Program and Project Management (RPPM) website allows the transportation research community to share information, as well as communicate, coordinate, and collaborate on shared issues. The RPPM website is a content management system (CMS) based website developed using WordPress CMS. This document provides detailed guidance and instructions for information posting on the new RPPM WordPress website.

## Documents Management Guide

This section of the document provides information about the guidelines for using documents management plugin from the WordPress back-end. The user will have to log in at the WordPress admin dashboard to access the documents and event management plugins of the website and make required changes.

### Admin Interface

The admin interface consists of a standard WordPress dashboard with a list of options on the left side. This contains Events, Documents, Links and Profile from top to bottom. The top two options, Events and Documents, will be used to manage all the Documents and Events for the RPPM Website.

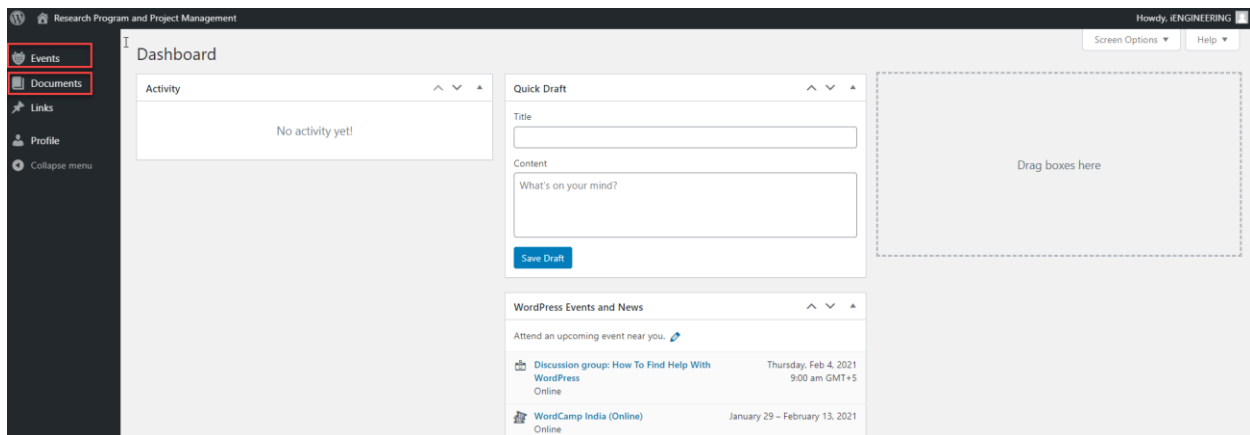


Figure 1. WordPress Dashboard for RPPM Website

The process of managing these Events and Documents both are explained in the following headings.

### Managing Documents

The documents plugin allows authorized users to add any kind of documents for posting on the RPPM website. The user will be able to add metadata about each document and upload attachments or provide the URL for accessing the document online. In case of attachments, only PDF, Word, PowerPoint, and Excel format documents will be allowed for uploading. The plugin will show an error notification if any other file format is uploaded through the plugin.

The following screenshot shows the admin panel UI for viewing a list of all the posted documents.

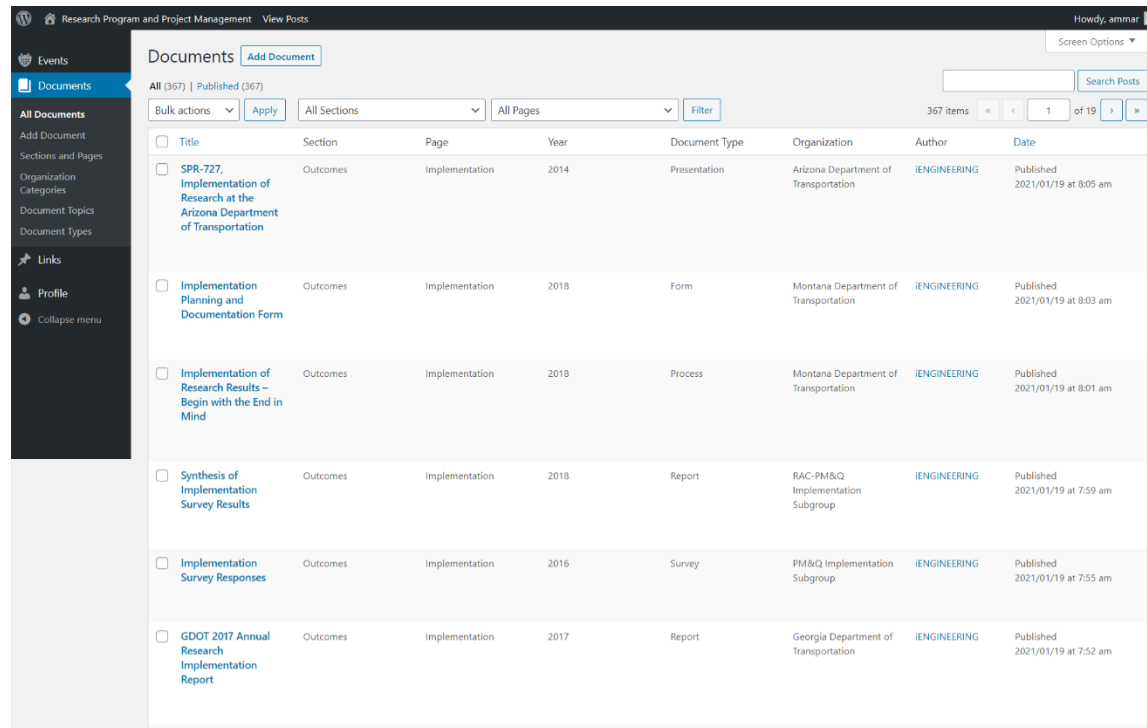


Figure 2. A list of all Documents uploaded through the Documents Plugin

Please note that just below the heading of “Documents”, there are multiple tabs for “All”, “Mine”, and “Published” documents. Each tab is explained below:

1. “ALL” enlists the documents that have been published, as well as those saved as drafts.
2. “MINE” enlists the document that have been posted by the user that is currently viewing the screen.
3. “PUBLISHED” enlists the documents that have been published using the plugin.

At times when there are multiple documents that are currently saved as drafts, or have been moved to Trash, two more tabs will show up enlisting the “Drafts” and “Trash” documents, respectively.

Note: Any document that is deleted from the website remains in the Trash category for 30 days from the date of deletion. User can restore this document from the trash if they change their mind at any stage. However, the document in “Trash” will be permanently deleted after the 30-day period.

## Adding a Document

Clicking the “Add Document” button above the documents list opens a web form with multiple metadata fields. The authorized user will fill out these fields and attach the relevant document files. The following image shows the UI for adding a document into the system. A short description about each input field is provided in the text following the image.

The screenshot shows the 'Add Document' form in the RPPM website. The form is divided into several sections:

- Document Title:** A text input field with a placeholder 'Enter document title. Please don't repeat Organization Name.'
- Section/Page:** Two dropdown menus for selecting the section and page. A note below says 'Please select the section and page where the document should be displayed.'
- Publication Year:** A text input field with a placeholder 'Enter the publication year (For example: 2020)'. A red asterisk indicates it is required.
- Document Type:** A dropdown menu with a note 'Select the document type.'
- Document Description:** A rich text editor with a toolbar (Paragraph, Bold, Italic, Text, List, Link, Image, etc.) and a 'Word count: 0' indicator.
- Organization Category:** A dropdown menu with a note 'Choose the category in which the lead organization that created this document fits.'
- Organization Name:** A text input field with a note 'Enter the Organization Name spelled out, such as Montana State University or Transportation Research Board. Include other organizations in the description.'
- Country:** A dropdown menu with a note 'Choose the appropriate country. To find your choice quickly, click in the field and press the first letter of your choice. Continue to press the first letter to toggle through all choices beginning with that letter. Choose Other if your country is not listed.'
- State:** A dropdown menu with a note 'Choose the State where this document was created and/or published. Select "Other" for locations outside of North America.'
- Contact Person:** A text input field with a note 'Enter contact person name if other than who entered the data.'
- Email Address:** A text input field with a note 'Enter contact person email if other than who posted the document.'
- Document Topic:** A dropdown menu with options: Administration and Management, Aviation, Bridges and Other Structures, Construction, Data and Information Technology, Design. A note below says 'Select Topic of the research needs detailed in the document or URL.'
- Keywords:** A text input field with a note 'Use keywords that identify the research topic you are posting.'
- URL:** Two text input fields labeled 'Enter URL' and 'Enter Display Text' with a note 'Enter a link to document.'
- Attachments:** A section showing 'No file is attached' and an 'Upload File(s)' button.

On the right side, there is a 'Publish' sidebar with buttons for 'Save Draft', 'Preview', 'Status: Draft Edit', 'Visibility: Public Edit', 'Publish immediately Edit', 'Duplicate', and 'Publish'.

Figure 3. Add Document

Each field to be filled at the time of adding a new document is described below.

1. **Document Title:** This is the document title. It may contain text, numerals, symbols, etc.
2. **Sections/Page:** This is to select the relevant Section and Page where the document should be displayed. For example, "Development" is a Section, while "Planning and Development" is a page under that section. The user will first select a section in the first dropdown and a list of relevant pages will appear in the second dropdown. (Please note that some sections have no child pages, so the page dropdown will disappear when such a section is selected in the first dropdown).
3. **Publication Year:** The user will input the year of the publication inside this field.
4. **Document Type:** There are different document types in the list from which the user can select one document type that best matches the subject document.
5. **Document Description:** The user will add a short document description or overview of the document inside this text box.
6. **Organization Category:** There are different organization categories in the list from which we can select one organization category that is applicable for the subject document.
7. **Organization Name:** The user will manually input their organization name. For example, Florida DOT, Montana State University, Transportation Research Board, etc.
8. **Country:** This is a dropdown field for the user to select the appropriate country.
9. **State/Province:** This field allows the user to select the appropriate state/province from the dropdown list. Please note that this list will only appear when the United States is selected as country in the previous field. In case of other countries, this field will be N/A.
10. **Contact Person:** This field allows the user to enter the name of the person who should be contacted for further information about the document.
11. **Email Address:** This field allows the user to add a valid email address of the contact person.
12. **Document Topic:** This field allows the user to choose one or multiple topics for the document. The user can simply click one topic, scroll down, and select more of them.
13. **Keywords:** This field allows the user to add any relevant keywords for the document, to make the document appear on the search page whenever those keywords are searched.
14. **URL and Text:** These fields allows the user to provide any external website link for reference, and the text that should be displayed for the hyperlink.
15. **Attachment:** The user can attach the files using the Upload Files(s) button. The text from these files will be parsed and stored in the database to make the file content searchable on the search page. Please note that the system will accept PDF, Word, PowerPoint, and Excel file formats only.
16. **Save Draft:** The user can save all added information as a draft by using the save draft button near the top right corner of the screen. This information will be saved in the back-end and will not appear to the public user unless published.
17. **Preview:** The user can click this button in the top right corner so that they can have a preview of how the document will appear after publishing. This is helpful to review the added information before publishing.

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**18. Publish:** The publish button (near the top right corner of the screen) allows the user to publish the document. Once published, the document will automatically appear on the selected page and section.

## Editing a Document

The already added documents can simply be edited by selecting the required document in the documents list on the “All Documents” page of the dashboard. The admin-user can change the existing document name, attachment files, description, publication date, and topic, etc. The following screen shows all the options that will be available at the time of editing a document.

Once the user has made all the changes to the editable fields, they can select the “Update” button near the top-right corner of the screen to make these changes public.

**Edit Document** [Add Document](#)

Research Project Research Guidance  
Enter document title. Please don't repeat Organization Name.

**Section/Page:** \*  
 Development Planning and Development  
Please select the section and page where the document should be displayed.

**Publication Year:** \*  
 2020  
Enter the publication year. (For example: 2020)

**Document Type:** \*  
 Resource/Tool  
Select the document type.

**Document Description:** Visual Text  
 Paragraph **B I**   
 Research project process are presented with guidance for researchers.  
 Word count: 9 Last edited by Sue Sillick on February 12, 2021 at 3:52 pm

**Organization Category:** \*  
 State/Province  
Choose the category in which the lead organization that created this document fits.

**Organization Name:** \*  
 Montana Department of Transportatic  
Enter the Organization Name spelled out, such as Montana State University or Transportation Research Board. Include other organizations in the description.

**Country:** \*  
 United States of America  
Choose the appropriate country. To find your choice quickly, click in the field and press the first letter of your choice. Continue to press the first letter to toggle through all choices beginning with that letter. Choose Other if your country is not listed.

**State:** \*  
 Montana  
Choose the State where this document was created and/or published. Select "Other" for locations outside of North America.

**Contact Person:**  
 Susan Sillick  
Enter contact person name if other than who entered the data.

**Email Address:**  
 ssillick@mt.gov  
Enter contact person email if other than who posted the document.

**Document Topic:** \*  
 Pedestrians and Bicyclists  
 Pipelines  
 Planning and Forecasting  
 Policy  
 Railroads  
 Research (about research)  
Select Topic of the research needs detailed in the document or URL.

**Keywords:**  
Use keywords that identify the research topic you are posting.

**URL:**  
 https://mdt.mt.gov/other/webdata/ex Researcher Guidance  
Enter a link to document.

**Attachments:**  
 No file is attached  
[Upload File\(s\)](#)

**Publish** Screen Options  
[Preview Changes](#)  
 Status: Published [Edit](#)  
 Visibility: Public [Edit](#)  
 Published on: Feb 12, 2021 at 15:52 [Edit](#)  
[Duplicate](#)  
[Move to Trash](#) [Update](#)

Figure 4. Edit Document

## Events Management Guide

The RPPM website also enables the users to manage one-time, as well as recurring events on the website. This section presents information about adding, editing, or deleting any events on the website.

### Events (Single Incidence)

The events plugin allows adding any kind of events to be posted on the RPPM website. The user will add metadata about each event, as well as upload attachments. In case of attachments, only PDF, Word, PowerPoint, and Excel format documents will be allowed for uploading. The plugin will show an error notification if any other file format is uploaded through the plugin.

The following screenshot shows the admin panel UI for viewing a list of all the posted Events.

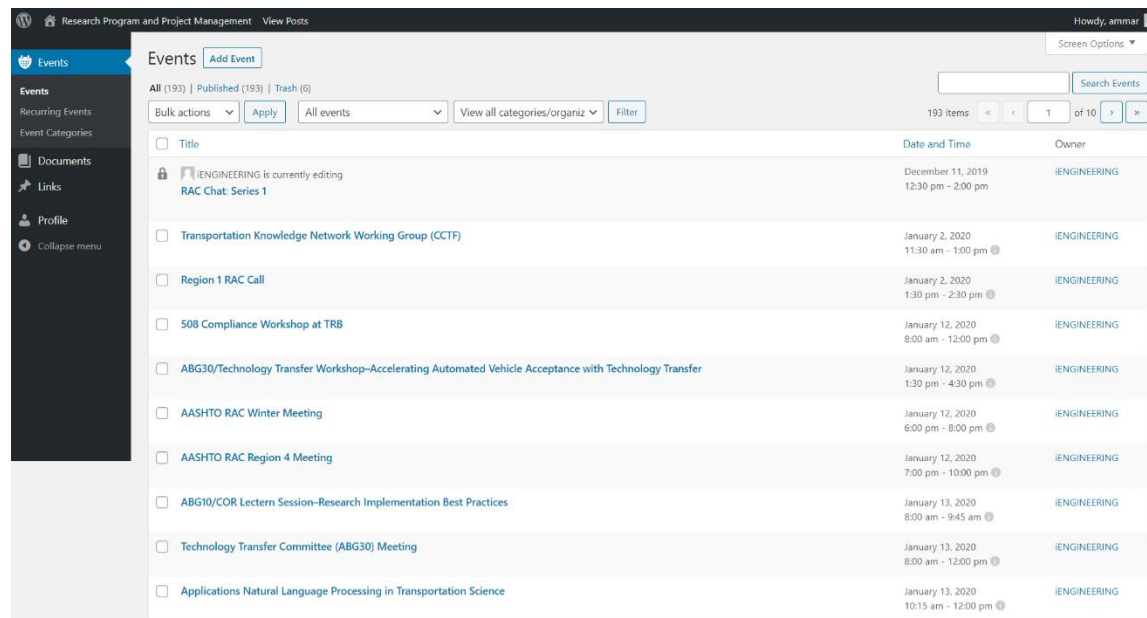


Figure 5. Events List

### Adding an Event

The Add Event button appears on top of the events list. The user can select this button to fill the form for adding a new event. A screenshot of the Add Events form is provided below, followed by a description of all individual fields.

The screenshot shows the 'Add New Event' form in the RPPM website. The form is divided into several sections:

- Add title:** A text input field for the event title.
- Event Description:** A rich text editor with a toolbar (Paragraph, Bold, Italic, List, Link, etc.) and a 'Visual'/'Text' toggle.
- Event Details:** A section with several dropdown menus and text inputs:
  - Category: Select Category
  - Organization: A list box for selecting organizations.
  - Country: Select Country
  - State: Select State
  - City: Text input
  - Mode: Select Mode
  - Meeting Type: Select Meeting Type
  - URL: Two text inputs for 'Enter URL' and 'Enter Display Text'.
- When:** A section for scheduling:
  - From: 02/24/2021 to 02/24/2021
  - Event starts at: 12:00 AM to 12:00 AM, with an 'All day' checkbox.
  - Timezone: UTC-5
  - Footnote: This event spans every day between the beginning and end date, with start/end times applying to each day.
- Attached File:** A section with an 'Upload File' button.
- Publish:** A sidebar on the right with buttons for 'Save Draft', 'Preview', 'Status: Draft Edit', 'Visibility: Public Edit', 'Publish immediately Edit', 'Duplicate', and 'Duplicate Event', and a 'Publish' button at the bottom.

Figure 6. Add Event

Each field to be filled at the time of adding a new event is described below.

1. **Event Title:** This is the document title. It can contain text, numerals, symbols, etc.
2. **Event Description:** The user can add a short event description or overview about the subject event in this field.
3. **Category:** This field allows the user to select any one category from the list.
4. **Organization:** Based on the selected event category in the previous field, specific organizations will be populated in this list. The user can select one or more organizations for the specific event by simply clicking on the relevant organizations.
5. **Country:** The user can select the relevant country from the drop-down.
6. **State/Province:** The user can select the state or province, if applicable. (this field will disappear for any country other than the US)

7. **City:** This field allows the user to add the city name.
8. **Mode:** There are different modes in the list from which the user can select the appropriate mode for a specific event.
9. **Meeting Type:** There are different meeting types which the user can select the appropriate type for a specific event.
10. **URL:** This field allows the user to provide any external website link for reference. The user can also provide Display Text that will be displayed on the front-end for a hyperlink.
11. **From - To:** These fields allow the user to add the start and end date of the event from the calendar.
12. **Event Starts and Ends at:** This field allows the user to select the event start and end time from the dropdown list. If the event is for a whole day, the user can select the "All Day" checkbox and the time will be set automatically to day-end.
13. **Time Zone:** This field allows the user to select a time zone from the list for a specific event. Please note that these time zones will appear on the front-end with the event time, to reduce the confusion of people accessing the website from different time-zones. For Example, the time zone for Eastern Standard Time (EST) would be UTC-5. User can either select UTC-5 option or select New York in the time-zone dropdown. Both will refer to the Eastern Standard Time. Similarly, the time zone for London (England) would be UTC, or user can select London option from the dropdown. For ease of use, the user can select the dropdown and type the initials of their time-zone's main city and they will be taken to that city (For example, selecting the dropdown and typing "NEW" will take them to the option of New York). It must be noted here that since most of the RPPM users are located in Eastern Time Zone (UTC-5, New York), the default option in the drop-down is fixed at New York. However, any user can change this while adding or editing an event. A list of all the time-zones, their UTC Offsets, and their representative cities is provided at the end of this document (Appendix-1) for reference.
14. **Attached File:** The user can attach the files using the Uploads Files button.
15. **Save Draft:** The user can save all the added information using the Save Draft button.
16. **Preview:** The user can click this button in the top right corner so that they can have a preview of how the event information will appear after publishing. This is helpful to review the added information before publishing.
17. **Publish:** The Publish button allows the user to publish the event publicly.

## Editing an Event

The already added events can simply be edited by selecting the required event in the list. The admin-user can change the existing event title, attachment files, description, Mode, and category, etc.

The following screen shows all the options that will be available at the time of editing an event.

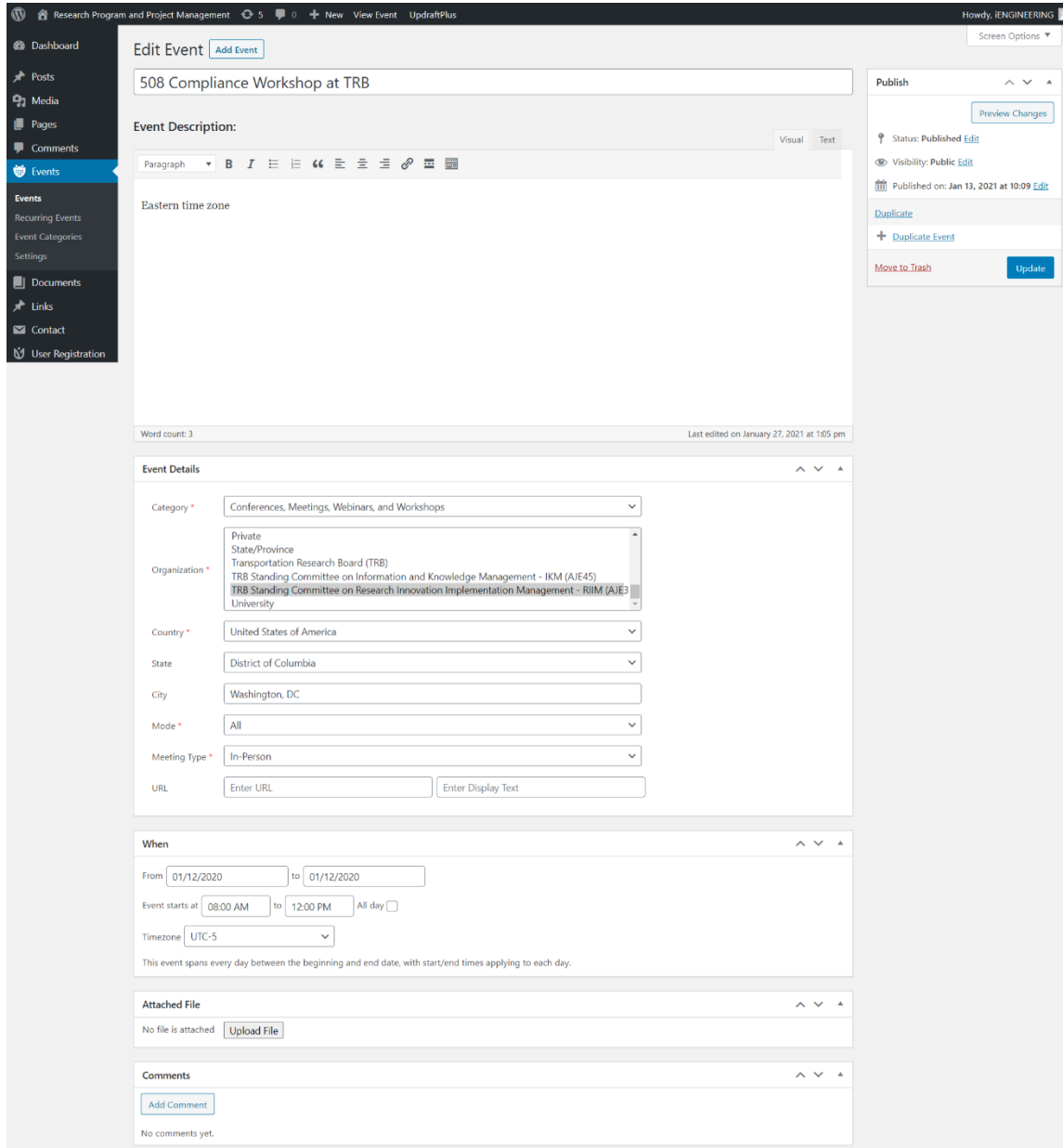


Figure 7. Edit Event

## Recurring Events

Recurring events are a special kind of events that keep recurring on specified intervals of time. The user will have to create only one recurring event and specify its recurrence rules. Once the rules are specified and the event is published, the system will automatically create multiple incidences of the event on the calendar. The screen displaying all recurring events is provided below.

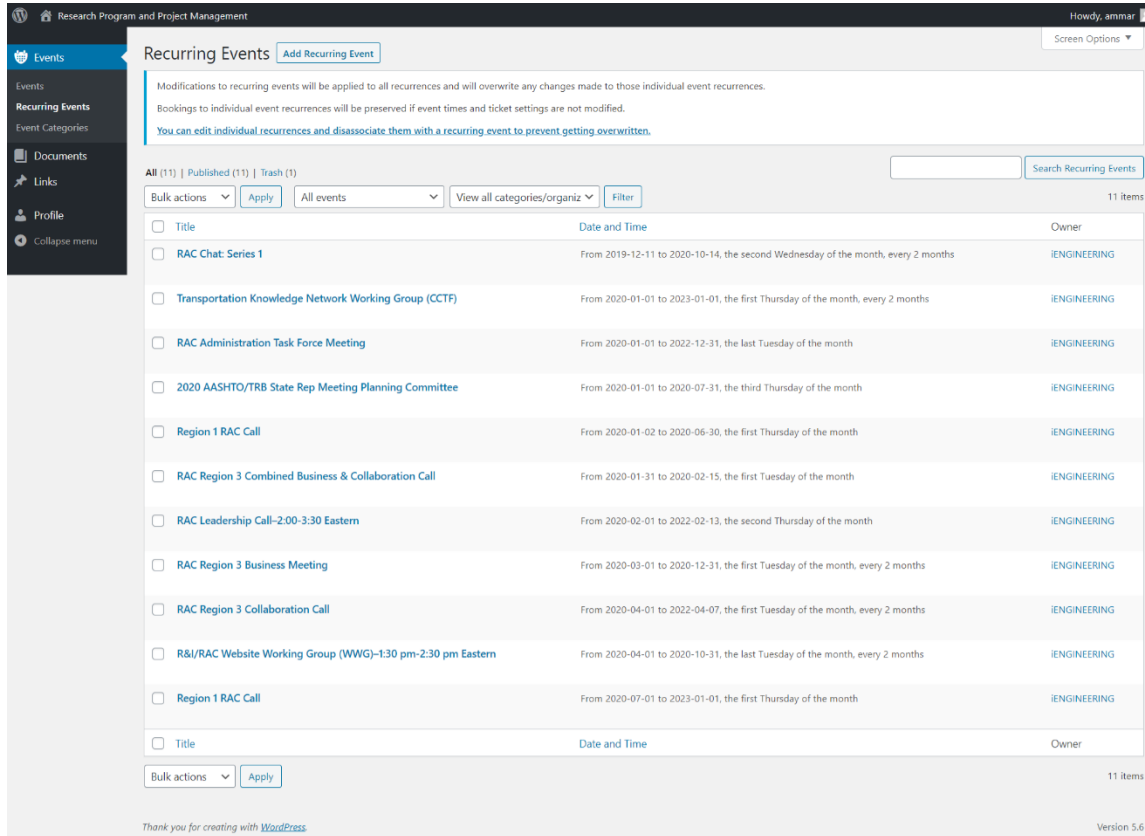


Figure 8. Recurring Events

The user can select any recurring event to edit its details or select the Add Recurring Event button at the top to create a new recurring event.

### Adding Recurring Event

The Add Recurring Event button appears on top of the recurring events list. The user can select this button to fill the form for adding a new recurring event. A screenshot of the add recurring events form is provided below.

The screenshot shows the 'Add New Recurring Event' form. At the top, there is a title field labeled 'Add title'. Below it is the 'Event Description' section with a rich text editor. The 'Event Details' section contains dropdown menus for 'Category', 'Organization', 'Country', 'State/Province', 'City', 'Mode', and 'Meeting Type', along with text input fields for 'URL' and 'Enter Display Text'. The 'Recurrences' section includes time pickers for 'Events start from' and 'to', an 'All day' checkbox, a 'Timezone' dropdown, and options for 'This event repeats' (Daily, weekly, monthly, yearly) and 'Recurrences span from' to 'to'. The 'Attached File' section has an 'Upload File' button. On the right, a 'Publish' sidebar shows 'Status: Draft Edit', 'Visibility: Public Edit', 'Publish immediately Edit', and a 'Publish' button.

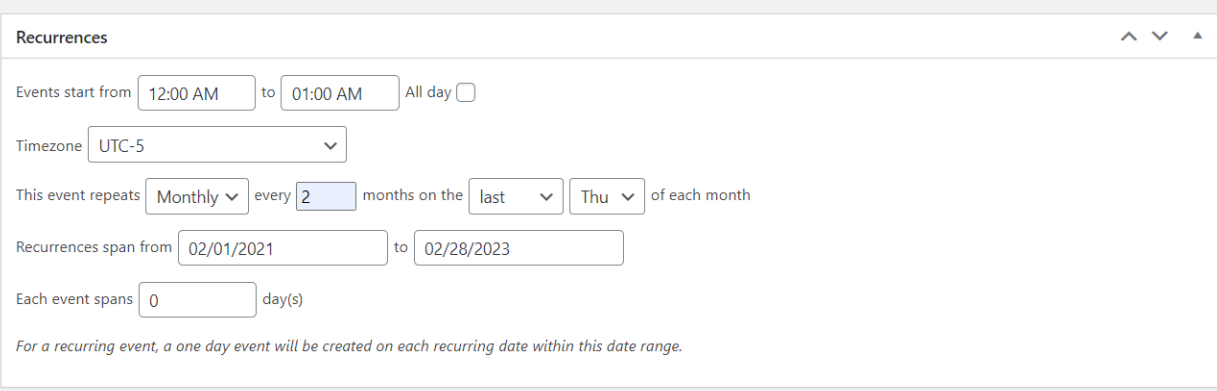
Figure 9. Add Recurring Event

In the above screenshot, most of the fields are the same as those in the simple events. These fields have already been explained in the previous section. However, the last part of the form about the recurrence pattern is explained below.

1. **Event Start from-to:** Similar to the simple events, this field allows the user to select the Event start and end time from the dropdown. If the event is for an entire day, then the user can select the all-day checkbox.
2. **Time Zone:** This field allows the user to select the time zone from the list.
3. **Event Repeats:** This field allows the user to select the recurrence criteria for the subject event. For example, the event may repeat daily, weekly, monthly, or yearly. Once you select the option, it will show you additional options based on your selection.

4. **Recurrences Span from-to:** This field allows the user to select the recurrence span for the event. The admin can select the start date from which that recurrence initiates, and the end date after which the recurrence pattern will stop. This span can be set to multiple years, months, weeks, or days.
5. **Each Event Spans:** This field asks for the day count for each single incidence of the event. This will only be updated if an event spans more than one day consecutively. Otherwise, it should be zero.
6. **Attached File:** This option allows users to attach files to a recurring event. Please note that any file attached with the main recurring event will be uploaded only once but will be accessible in all the single instances of the recurring event. Thus, the editors/admins are advised to upload their monthly/annual documents by editing the recurring event instead of a single instance of the recurring event.

Based on the above description, a filled example of a recurring event fields is provided below.



The screenshot shows a form titled "Recurrences" with the following fields and values:

- Events start from: 12:00 AM to 01:00 AM. All day:
- Timezone: UTC-5
- This event repeats: Monthly every 2 months on the last Thu of each month
- Recurrences span from: 02/01/2021 to 02/28/2023
- Each event spans: 0 day(s)

*For a recurring event, a one day event will be created on each recurring date within this date range.*

Figure 10. Event Recurrence Pattern (example)

In the above example, we have created an event that starts at 12 AM, ends at 1 AM, in the UTC-5 (Eastern) time-zone. The event will repeat every 2 months on the last Thursday of the month. The recurrences have been initiated from February 2021 and will be continued until February 2023. No events will take place after February 2023 for this example. Moreover, each event spans 0 days, indicating that each event will start and end in the same day.

Note: Whenever a recurring event is added, the plugin will create multiple single incidences of the event on the calendar. In the back-end, the recurring event will show once inside the "Recurring Events" list, and multiple times in the "Events" list. If an editor or admin wants to edit any details of a recurring event, they are advised to only update the details by searching for the event name inside the "Recurring Events" list. That way, all the single incidences of such recurring events will be automatically updated. If an admin/editor decides to edit any single incidence of a recurring event, the subject changes will only appear in that single incidence and not in the rest of the recurring incidences. The same goes for deleting the recurring event. If the main event is deleted from the "Recurring Events" list, the single instances will also be deleted. However, if any single instance of a recurring event is deleted, it will have no effect on any other instances of the same recurring event.

## Appendix-1

This section provides information about the various time-zones observed in different regions of the United States, their corresponding [Coordinated Universal Time \(UTC\)](#) offsets, and their main cities.

### Standard Time-zones in the United States

The following is a list of all time-zones that are applicable for different regions of the United States. These are the standard time-zones.

Offset		Time Zone Abbreviation & Name	City
UTC -10	<a href="#">HST</a>	Hawaii Standard Time	Honolulu
UTC -9	<a href="#">AKST</a>	Alaska Standard Time	Anchorage
UTC -8	<a href="#">PST</a>	Pacific Standard Time	Los Angeles
UTC -7	<a href="#">MST</a>	Mountain Standard Time	Phoenix
UTC -6	<a href="#">CST</a>	Central Standard Time	Chicago
UTC -5	<a href="#">EST</a>	Eastern Standard Time	New York

Table 1: A list of all the Standard time-zones of the US region.

### Daylight Time-zones in the United States

There are additional time-zones that are observed in different regions during other parts of the year. These are known as the [Daylight Saving Time \(DST\)](#) or just Daylight Time. This is the practice of setting the clocks forward one hour from standard time. Most regions in the Northern Hemisphere (north of the equator) use DST in the summer time. Daylight Saving Time usually starts in March-April and ends in September-November when the countries return to [standard time](#). A list of all the daylight times is provided in the following table.

Offset		Time Zone Abbreviation & Name	Commences
UTC -9	<a href="#">HDT</a>	Hawaii-Aleutian Daylight Time	<a href="#">14 Mar 2021</a>
UTC -8	<a href="#">AKDT</a>	Alaska Daylight Time	<a href="#">14 Mar 2021</a>
UTC -7	<a href="#">PDT</a>	Pacific Daylight Time	<a href="#">14 Mar 2021</a>
UTC -6	<a href="#">MDT</a>	Mountain Daylight Time	<a href="#">14 Mar 2021</a>
UTC -5	<a href="#">CDT</a>	Central Daylight Time	<a href="#">14 Mar 2021</a>
UTC -4	<a href="#">EDT</a>	Eastern Daylight Time	<a href="#">14 Mar 2021</a>

Table 2: A list of all the Daylight time-zones of the US region.



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