Mights and Magics in Quickr 8.0

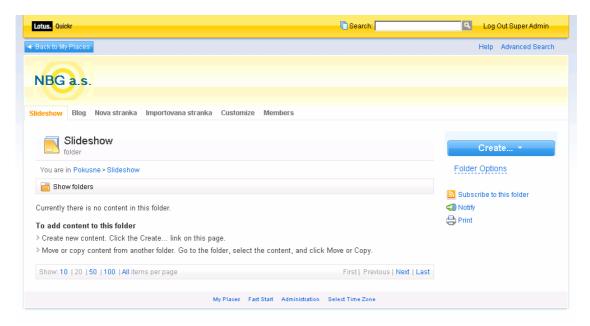
Customizing your place in Quickr



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Quickr is software which can help communities to build their own portal in an easy way. It can help them create their pages, private rooms, groups and everything they could need to efficiently start using all its features.

Something what can limit their portal is the look it has. There are only a few skins in the basic installation of Quickr but too many companies. The basic skin is this yellow-blue one:



Every company has its own needs; the look and schema of their portal is maybe not one of the most important but surely one of the most often seen. During a student internship there was developed a template for Quickr including the whole skin and place type. With co-operation with a Czech company NBG a.s. there was developed this violet skin:



As can while comparing the screenshots, it is not only colors what is different; the whole page has another schema. These pages should guide you through the customization process to give you help and support while changing the appearance of your Quickr portal.

Get started

The first thing you should do is to define how your portal should look like. And there is not spoken about the colors. In the basic Quickr skin the content is organized in this way:



Description

- **Banner 1:** there is situated the search panel and login information on the right. The rest of the banner serves like an aesthetical surround for the logo of IBM Quickr and to be honest it has no informational value.
- **Empty area between banners:** there are stored additional links in this space as well as link leading back to the list of places.
- **Banner 2:** Another space for another logo including the name of the place.
- **Table of content:** situated at the top of the main content area it organizes the portal into tabs
- **Left action column:** Gives users option how to broaden, edit and customize the content of their portal. Below it the print, notify and RSS links are situated.
- **Page Content:** contains the page/folder name and description, breadcrumb navigation and the main content.

What the company wanted to change

• The company did not find valuable arguments for having 2 banners divided by an empty space with several logos. Despite Quickr allows users to create their own logo containing text, sample pictures and animation (Click Customize - Basics) the company was not satisfied with the result.



- Page content was organized well so it did not have to be changed, but the position of other elements was unordinary for users. Table of content should be in the right column of the main area and the block with actions would be situated at the top much better. The print, notify, etc. links do not need to be separated in its own column as it takes too much space from the main content are but should be easy to find.
- The company's colors are gray and violet; the look should be changed according to it.

New skin, cool look, different schema

Due to the points above the portal was reorganized in this way:



As you can see the design was customized according to the company's requests. Until now there had to be used only a little imagination and a pencil. For customizing your portal there is need of a few more skills and abilities. Using CSS and HTML you can become a magician in Quickr and set your place to your needs.

Prepare for launch

There is a list of items you should have in your inventory:

- Basic knowledge of HTML
- Knowledge of CSS
- Knowledge of QuickPlaceSkinComponents (see more information below)
- HTML and CSS editor
- Internet Explorer and Mozzila Firefox
- Web developer toolbars for internet browsers mentioned above

QuickPlaceSkinComponents

Quickr uses elements called QuickPlaceSkinComponents (QSC) to display the content of the whole pages. According to these features you do not have to know how to enter the portal database and how to get the information you need. You just have to know the right name of the component and know how to display it.

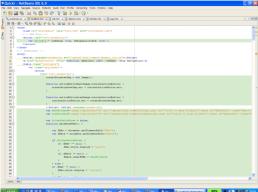
For example QSC with name PageContent can display the main content of each page. QSC Navigation creates previous and next links to easily move between items. QSC Help gives link to help pages and QSC print enables your site to generate a printer-friendly version of displayed page. There are many QSC, so how to learn about them?

There is an IBM redbook available for anyone for free in HTML or PDF version. It is located in the same folder as this document and its name is Customizing QuickPlace.pdf. The parts you should be interested in start on page 89 (Chapter 4.3 The QuickPlace Theme layout Architecture). Going through this text helps you understand how to organize content of your pages.

Helpful tools



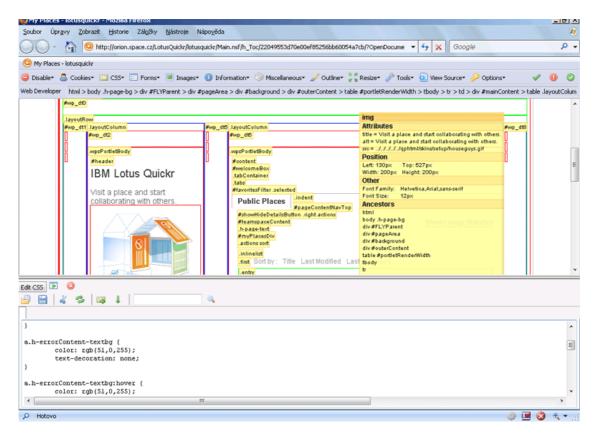
It is much more comfortable to use a HTML editor. Of course you can use a windows standard notepad but it is quite terrifying. I recommend free software **NetBeans 6.0** with support for web development. It is a Sun open licensed product which can be easily downloaded from this page: http://www.netbeans.org/downloads/.



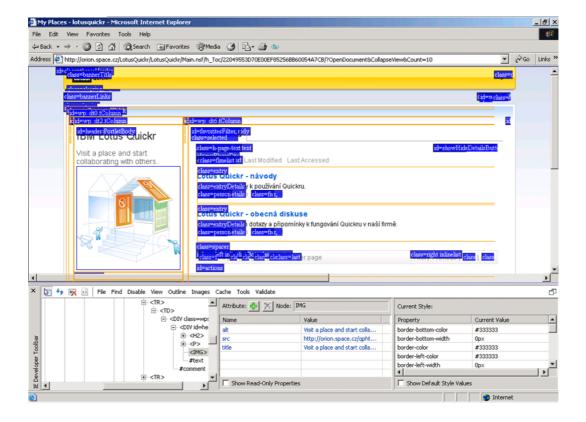


As it was already noticed you should use Internet Explorer (IE) as well as Mozilla Firefox. Keep in your mind that some features cannot be used in Firefox (as it does not support ActiveX components) and sometimes the result looks different in each browser (according to each of them uses different standards). The greatest functionality of Quickr can be achieved with IE, but Firefox and its developer toolbar helps you with customizing your place a lot.

I recommend installing add-on Web Developer Toolbar into your Firefox. It can be easily found at this website: https://addons.mozilla.org/en-US/firefox/addon/60. You can display the whole CSS or HTML code and you can edit it online. These changes are only temporary so with new reload of the page the original code will be displayed. You can outline tables, table cells or divs, you can display class and id information for every element defined in the CSS, get information about used images. It has plenty of cool features which will help you a lot.



For Internet Explorer there is familiar toolbar as well. It does not have the same functionality but the most important features like finding a CSS element or outlinig tables are included. It is called IE Developer Toolbar and can be downloaded from the official pages of Microsoft: http://www.microsoft.com/downloads/details.aspx?familyid=e59c3964-672d-4511-bb3e-2d5e1db91038&displaylang=en



Ready, set, go!

Now you should be well equipped for the Customization. The last missing items are the source files of the portal. It is important to notice you must have manager or super user rights to be able to change your portal.

Quickr uses 5 HTML pages to display and organize the content of your pages. It is

- Headlines mostly the home page. When you create a folder in a headlines style you can add pages which will be seen as tabs inside this folder.
- Listfolder theme for every folder you create except the headlines folder
- Page page structrure for a simple page
- Edit defines how will look edit page (for example Click Customize)
- Slideshow defines the layout of slideshow folders

To control the look of the portal Quickr uses Cascade Style Sheet (CSS file).

• Stylesheet – manipulates with the look of the portal

Locating source files

Where you can find those files? We start from the common, basic skin. It is located in folder qphtml which is located in the directory where your Domino server is installed – the default path is Lotus/Domino/data/domino/html. If you cannot find it use your Operation System's searching agent and look for qphtml.

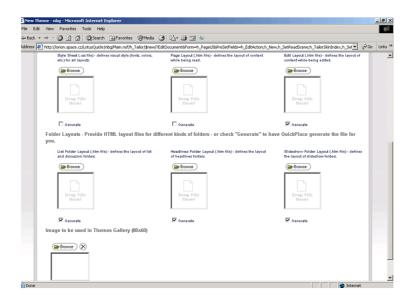
After you have successfully located this folder open it and go to skins – quickr8. There are stored all files, documents and images for the default Quickr theme.

Start your HTML editor (Netbeans) and create a new web project (click New project, select Web and in the right column choose Web application). Remember the path to this project.

Copy the whole folder with Quickr Skin to the directory of your project. Now when you click on Files in the left menu in Netbeans you can see the copied folder. You can enter it like you are used to do it and see all files inside. The files you are going to change are stylesheet.css, headlines.htm, listfolder.htm, page.htm, edit.htm and slideshow.htm.

Changing the portal

Now you are going to learn how to create your own theme and how to upload and run it at your portal. When you are inside your place, click Customize, the go to Custom Themes and select Create Custom Theme. Fill all the necessary fields. You will see these areas at the page:



You can easily drag the changed files into the right boxes (edit page in the box for edit page etc.) or you can click Browse button and select the file you want to use in the standard explorer menu. You can as well insert the thumbnail of your scheme.

Remember these steps as you will use them quite often. If you are not sure about what to do, see enclosed PDF file (in the same folder as this document) Customizing QuickPlace.pdf. Find Chapter 4.1.2 Customizing Themes Quick Start.

When you upload a file then everything out of <body> tags is removed and changed by Quickr own header. When you call a page to be displayed the Quickr java scripts take care about the content and changes the page. Some parts are added, some are changed. For example to your style sheet are added some more default selectors.

Portal modification

There is a great overview of default CSS style in the IBM Redbook (in the same folder as this document look for Customizing QuickPlace.pdf). In chapter 4.2.2 there are listed all the selectors and its properties.

Page background and dimensions

```
.h-page-bg {
    background: url(pagebg.gif) repeat-x;
    background-color: white; /*edit*/
    min-height: 400px;
    padding-top: 0px;
    margin: 0px;
    margin-left: auto;
    margin-right: auto;
}
```

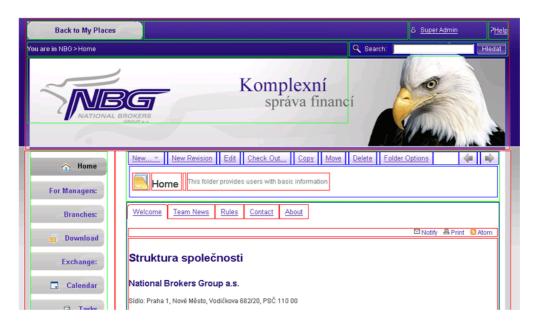


We are going to change the background of your portal. It is defined in default class **.h-page-bg** in the style sheet. There you can set the color of the background (background-color), padding and margin. In our scheme there was created a gradient with width of 1px. At the top it changes from light violet to dark violet color, divided by a white pixel and then it changes from gray to white. The color of the background is set to white. This background is set to be repeated in x-axis to create a whole-page gradient effect.

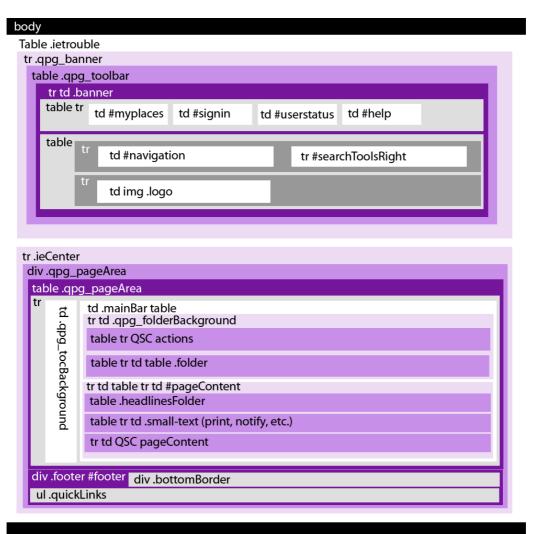
In the HTML files the background is set by class qpg_pageBackground. There is no more need of this selector so remove it from both HTML files and style sheet.

Whole Page Content Organization

In order to see it in the same way in IE and Firefox there was used a table layout. It means that the parts are situated in table cells. If you let your developer toolbar outline table cells you could easily imagine what there is talking about.



Every component is settled in its own cell. To understand the layout system look at the image below. There are used HTML tags and CSS selectors to simplify it. Remember that QSC means QuickPlaceSkinComponent.



Banner change

Let's take a closer look at the top of every page.

This is the default banner look:



And this is what we want to create:





Work Offline

Some parts as login or help were repositioned, the parts of default banner were joined together and its background was changed as well.

According to the schema picture let's reorganize the banner. Open the file headlines.htm in your HTML editor (Netbeans) and go through the comments in it. Start at CUSTOMIZATION 1. Remember that if you want to make changes in the CSS don't do it in the commented area, but find the parts in the style sheet and edit them.

This banner is used in every HTML template. So in every file it should be changed.

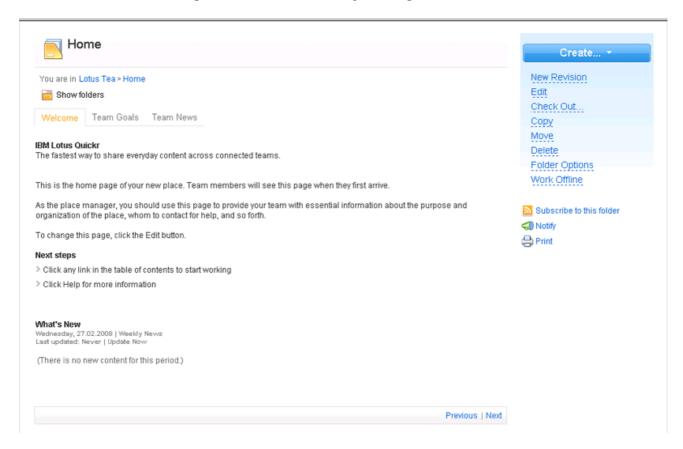
Table of content reorganization

The table of content is the skeleton of the whole portal. Without it you would be able to use only one page. In the basic scheme it is located at the top of the main area (below the banner). In our scheme the Table Of Content (TOC) was positioned to the left column of the main area according to users' habits. Now open file headlines.htm in your HTML editor (Netbeans) and start reading from CUSTOMIZATION 2. On the left you can see new TOC; below is the default one.



Main page content change

The most important part of every page is its main content. Now we are going to change its look. The first image is the default skin. On the left is the main area, on the right is actions panel. But below it there is a free space. The main area is organized quite well so this skin tried to follow it.



The next screenshot is the new scheme. The actions panel was removed and positioned to the top of the page. Its look has been changed as well so each item seems like a form button.



Navigation in the folder is displayed both on the top and on the bottom. It helps user to orientate while the page contains a really long text.

The folder description was moved next to its name. And the last change happened to print, notify etc. links. They are situated between the main page content area and folder details panel.

As you can see many parts were left from the default scheme. You can change it if you want but in my opinion it is organized in a good way.

To understand and learn how to customize the content open file headlines.htm in your HTML editor (Netbeans) and start reading at CUSTOMIZATION 3.

Footer

In the footer there are grouped some basic links leading to control features if your portal.

You can see that there was not changed a lot. There was added a div for the bottom gray border of the main page area, the colors were changed and before every link was added a picture.

```
→ My Places → Fast Start → Administration → Select Time Zone

My Places Fast Start Administration Select Time Zone
```

To see how to do it open file headline.htm in your HTML editor (Netbeans) and look for CUSTOMIZATION 4.

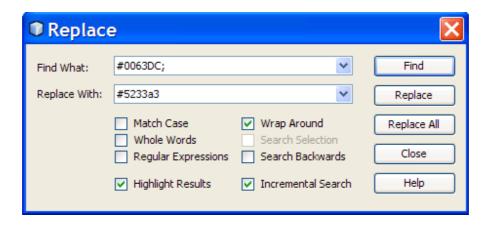
The last details

You should change the font color of similar content. It means that the links for example should have the same color. The easiest way how to do it and not to edit each element manually is using the replace function in your HTML editor. There is a big advantage that in the default scheme the content is already organized. Let's see the following example. I want to change blue links to violet ones. I go to the selector which defines color for links. The basic one is this: a {}. Inside the brackets I can add rule font-color: and specify the color of links. So it could seem like this:

But for many links are used different selectors where is specified another link-color. To change it find class small-text in the default Quickr style sheet:

```
.small-text a, .small-text a:visited {
  color:
  text-decoration: none;
}
```

The selector above says how will look like links in the footer area (see image above). Important information is hidden in the rule for color. This font-color is used for similar content. Now is time to use replace function in your HTML editor. In Netbeans click Edit from the top menu and select Replace. In the Find What area type the color code from the small-text class where the font color is specified. In the Replace With area type the code of color you want to have. Click Replace All to change the color for every occurrence in your style sheet.



At the end you should change the basic style for HTML elements. In the default scheme these items are at the top of the style sheet (lines 4 to 33) – tags BODY, A, FORM, TH. In our scheme there was changed the link color only. But there was added some more basic selectors:

```
ul li {padding: 0px 0px 0px 15px; background: url(li.gif) no-repeat left; list-style: none;} h1, h2, h3, h4, h5 {color: #290c73;} h1 {font-size: 16pt; padding: 10px 0px;} h2 {font-size: 13.5pt; padding: 5px 0px;} h3 {font-size: 12pt;}
```

The ul li selector defines the look of unordered list. As a delimiter is used picture li.gif. The padding is set to 15 px on the left, so the delimiter can be seen.

The h1,h2,... selectors defines style for headings (h1 for Heading 1, h2 for Heading 2 etc.).

Action menu colorizing

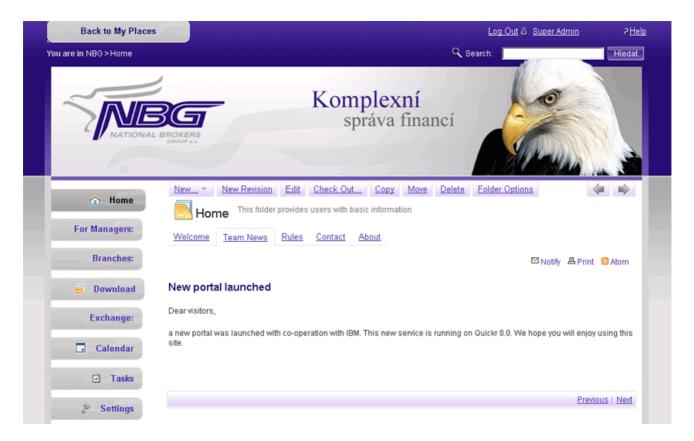
The last thing you will learn to change is the pop action menu. When you select the pointer next to New... in the action panel a menu is rolled down. There is used blue color but the skin needs violet. You will have to add the following lines to your style sheet:

```
.wcfMenuBorder {border: 1px solid #7359b5;}
.wcfMenu {background: #d7cdee !important;}
.first {background: #d7cdee !important;}
```

Those selectors control the look of the menu.

Headlines are done; and the rest?

The described steps above should help your turn the common Quickr look to the different one below. The methods you used in the headlines template are applicable to the other templates as well. Firstly replace banner, then change the main area, TOC (notice that there in edit.htm the TOC is not used), main page area and footer. Some parts can be copied, some can be edited. In the style sheet stayed some unused selectors. You don't need to remove them. If there is found no match with the selector then the style is not used. And remember that some parts you haven't edited still have influence on the look of the portal. If you are not sure which selector describes a part in your portal use your developer feature. In Firefox click Display – Display Element Information in your web developer toolbar. Then when you click any element information about it is displayed. In IE click Find – Find by Click and use the same method for selecting elements.



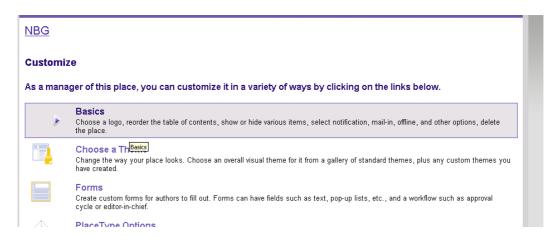
There are a few differences in other templates (page, edit, slideshow, listfolder). In the next chapter only those differences are mentioned. The rules from editing headlines.htm are applicable in all other templates.

Edit.htm

There are only two differences in this template. First, there the TOC is not used as it is important to have the most of the area free for edit needs. Second the action panel is moved below the page content. It is easy to be done. Just change the order of QSC actions and QSC pageContent.

Style sheet modification

When you click Customize or when you try to create a new page for example you can see some areas which are situated in a blue rectangle. But our scheme has to be violet.



NBG			
Create:			
Page Create a new page that can include formatted text, images, and file attachments.			
Title: ✓ Show the title, author and date on page?			
Contents:	v v2 1/2 - pa	_ /ABC	

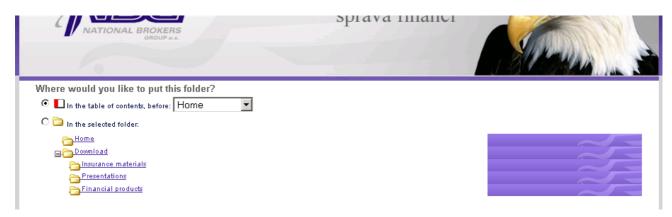
When you select an item in Customize there is made a violet background around it ant the picture is replaced by a pointer. Or when you create a page/folder/... it is situated in a violet rectangle. To make this effect add the following lines to your style sheet:

```
#pageContent .choices a:hover {
          background: url(this.gif) no-repeat 50px;
          background-color: #e7e3e7 !important;
          border: 1px solid #7359b5;
}
.choices a {color: #7359b5 !important;}
.choices a:hover {color: #290c73 !important;}
```

The classes above takes care about the look in Customize item when mouse selector is placed over them. The selector below changes the background of the rectangle when creating or editing content.

The last bug is when you are deciding where to put a new folder/room. At the right of the expandable folders is used a background image. To cancel it use the following rule:

#folderSelector .toc-bg {background: none;}

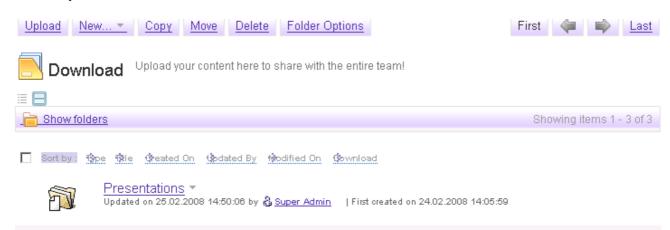


Listfolder.htm

The difference from the headline template is that it does not contain QSC headlines as there is used another system for previewing posts. The page content area is the same like in default Quickr scheme. Look at listfolder.htm in your HTML editor and look for LISTFOLDER CUSTOMIZATION (1. 371).

Changes in style sheet

When you let your portal show detailed list of post in a folder you can see a trouble with the links next to Sort by.



It is organized in an unordered list so there is uploaded an image at the background of each link. But there is no need of it. To remove the background just type in your style sheet the following rules:

```
#dragDiv .inlinelist li {background: white ;}
```

Another bug is the color of name leading to user who created the post, folder, page etc. It is white. To change this insert into your style sheet the following rule:

```
#pageContent .h-user-anchor a {
  color: #5230ab;
  background: url(user.gif) left center no-repeat;
  padding: 0px 0px 0px 15px;
}
```

Page.htm

This template is organized in the same way as the default Quickr file. But the whole document is formatted and transformed like headlines.htm. There is no QSC headlines and on the other side there are 2 more OSC – revertVersion and createVersion.

Slideshow.htm

As the company wanted to have slideshow folder organized like the other folders there is used the same code like in listfolder.htm.

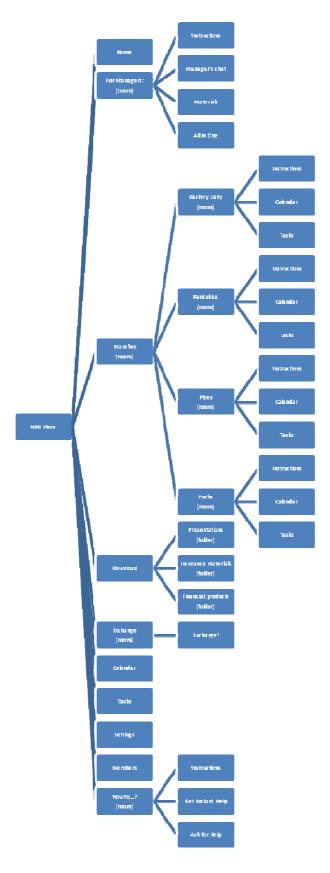
Unique portal - placeType

The whole portal was set to be a placeType. This means that new places can be based on this place. So it can be a template for future places. This can be set in Customize – PlaceType options.

This place uses its own skin and its own structure. It contains private rooms and groups of users. It has its own forms as well.

What does this portal contains?

There are several rooms and folders. Every has its own purpose. At the flow chart below is shown the structure of the place.



Description

Home

In this folder there are stored the main information about the company. There are 4 tabs.

- Welcome
- Team News
- Rules
- Contact
- About

Welcome page contains the description of the company's structure and it gives contact to managers.

In **Team News** there are stored the most actual information.

When you want to understand the rules at your place go to Rules.

When you want to find addresses, phones and e-mails of the company or its branches go to **Contacts.**

The services and offers of the company are in **About** tab. When you want to find out more information about the company go there.

For Managers:

This is a private room for managers only. The users with manager access are in group Managers. In this case those users are the 4 bosses of the company. If you want to add or remove users from Managers go to Members and select Manage members.

In this private room there have access only Managers and the SuperUser. This is a place where the top managers can share their ideas.

There are these folders/pages in this room:

- Instructions
- Manager's chat
- Materials
- All in One
- Room Options
- Room Security

Room Options and **Room Security** are in every room. In the first on you can customize the look of the room (something like Customize in the place, but with limited functionality). In the Room Security you can define which users or groups have access to the room.

Instructions give help to incoming users. There is written what the user could the at the place.

In **Materials** Managers can share contracts, licences, presentation, documents and everything they need to share.

All in One is renamed Index and there is stored every item in the room. This name was chosen because it more simple to be understood what is its functionality.

Branches:

This room gives space for links to every branches own room. Everybody has access to this room. There are 4 branches:

- Karlovy Vary
- Pardubice
- Plzen
- Praha

There are founded 4 user groups where the members are employees of the branch. Every group has access to its branch only. In another group called Bosses of Branches are the managers of each branch. They have access to all branches so they can exchange information and data among branches. Manager's group has superior access to each branch.

This is the structure of each branch:

- Instructions
- Calendar
- Tasks

It is important for each branch to have its own Calendar and Tasks list as the employees can be better organized. Each manager of a branch is its Manager user so its his duty to fit room structure to branch's needs.

Download

In this folder there are stored documents and supplementary material for all users. For example there can be found presentations, company's advertisements, information letters about financial and insurance products etc.

In this folder there are 3 more folders:

- Presentations
- Insurance materials
- Financial products

Each folder is there to store documents with similar content. As NBG a.s. did not want to share its internal documents there aren't stored the original files.

Exchange:

This room is accessible by all users. It provides place for sharing document between users. So if someone needs to send a contract to another user he would put it in this folder and he can restrict possible readers as well.

In this room users can create company's special forms as well.

There is only 1 folder in this room – Exchange!

Calendar

In this calendar there are all important events for the whole company like as presentations, teachings etc. As each branch has its own Calendar this one should not contain specific events for the branch. There can be displayed author of event (the user who created the event) but this information is hidden as it has no importance for the company. This is set in each Calendar.

Tasks

There are all important Tasks for the whole company, like meetings, contracts, etc. Each branch has its internal Tasks list so there should be items which influence the whole company. In our example there is need of making Easter postcards which should be delivered to each branch to be distributed to the customers. This task is written in there.

Settings (= Customize)

There you can change the place's properties like its look, forms, etc. It the ordinary Customize folder but renamed to Settings as it gives more sense according to the company.

Members

There you can manage members and create groups. You can hide this folder in Settings – Basics but I don't recommend it as then you can't add, remove and manage members and groups.

HowTo...?

This room gives support to users. It contains these folder/pages:

- Instructions
- Get Instant Help
- Ask for Help

In **Instructions** there is written what to do – the users are told what is stored in the other folders. If you are looking for answer go firstly to **Get Instant Help**. There are stored solutions to the most frequented troubles. It is de facto FAQ (Frequently Asked Questions) but not every user knows what FAQ stands for so the name of this folder was chosen in order to be understood by every user. When user cannot find answer in Get Instant Help he is advised to go to **Ask for Help**. This folder is organized as a forum, discussion where users can get help from other users. So they can help each other. This folder should be monitored by a group of specialist (in IT or company's services) so it could be granted that each user can get support.

Adding New Content

You can add folders, pages, posts, uploads, forms etc. to your content. When adding text into it you can choose whether you want to use a WYSIWYG editor (What You See Is What You Get). It seems like simplified MS Word or another text editor. Another option is to use HTML to display the content. There you can define your own classes and ids. Then you can control its look in your style sheet. In our style sheet were written this part of code:

These CSS rules define the look of tab Contacts in Home folder.

For advanced user it is better to use HTML editing possibilities. The online editor has much functionality but if you want to be precise HTML with CSS is the right choice.

New Forms, Workflow

In Quickr you can easily define your own documents – forms. T can be set in Customize – Forms – New Form or Room Options – Forms – New Form when you are in a room. These forms can be created to share data among the company members. To get more information about forms open Customize QuickPlace.pdf which is located in the same folder like this document and go to Chapter 6: Forms in QuickPlace (p.149).

In our portal the specific forms can be created in folder Exchange. There are set 2 forms:

- Insurance transfer application form
- Superior rights form

The first one is created as a simple form which is generated by Quickr environment, the second one is an imported HTML form.

Simple Form

While you are in Forms – New Form choose Simple Form. There you can create a form where its input boxes will be situated below each other like in a list. There are several buttons which can let you edit your form:

- Add
- Modify
- Remove
- Reorder

There is used a great guide for this feature so there is needed no more additional information. A simple form is created. If you would like to change the look of this form you have to add a Non-Editable-Rich-Text. There can be loaded a picture or additional text. In Insurance transfer application form this area is used to load a logo of NBG a.s. to the top of the page and to insert text to the form.

HTML Form

If you are skilled in HTML and CSS or if you want to upload a ready form from web pages use the option of uploading a whole HTML form. You can do it in New Form selecting Import HTML form. It has 2 big advantages – you can precisely design the form, the field placement etc. and you can control the look of your form by CSS rules. The form should be marked by its unique id or class. Just type in the style sheet CSS rules for your form and upload it on your portal.

There is a uploaded HTML form in the Exchange room. Its name is Warrant of Attorney. When a company wants to change its insurance agency there is need of this document. The HTML file is in the same folder as the whole NBG skin; its name is form.html. It's a simple form organized in a table which is in an unique id #superiorForm. The following CSS rules are added into our style sheet:

```
#superiorForm {background: #e7e6e7}
#superiorForm img {
   border-bottom: 2px solid white;
   border-right: 2px solid white;
   border-left: 2px solid #e7e6e7;
   border-top: 2px solid #e7e6e7;
}
#superiorForm input {border: 1px solid #290c73;}
#superiorForm strong {color: #290c73;}
```

You can see the difference between the results below.





Workflow

The 2 forms have quite a big importance. There is a responsible person who has to control each form before it is published. In this case is used workflow. When you are creating a form you can set it by clicking Workflow button. For our purposes is used mode Editor-in-Chief. That means that author of a form send it to an approving authority (he can add a message) and the authority can approve, edit or reject the form.

Forms waiting for approval are stored in Validate! Folder, approved forms are in Forms folder. Where the approved forms are stored can be set while creating the form. The place for storing forms waiting for approval can be set while defining the workflow.

New ideas

Quickr provides great and easy way how to create and customize your place. With HTML and CSS only the whole look can be completely rebuilt and changed can be anything. The tools I recommended



give anyone a force to customize his own Quickr. For example if you want to change an image or the whole scheme in the list of My Places go to the qphtml folder as you were advised at the beginning and choose skins – setup. There are the source codes and images for this page. I have changed the picture on the right of this page. By default there was in image of a house. This picture is called houseguys.gif. The original file was renamed in order to save it and the image was replaced.

It would be great to improve the strength of online HTML editor. If it had the same features like editors you can install on your computer it would be great (like auto formatting, colored syntax or code writing help).

It is great you can organize users into groups. On the other side it would be better if the users list were organized according to these groups. Now you can see list of users joined with list of groups. It can be a little frustrating. If the users were moved to its groups which you could expand or collapse it would be great.

Another great feature is Calendar. But the one who uses this feature on his own computer can miss several features. There could be a possibility to create event groups differenced by colors from each other.

On the other side it has to be said that into your Quickr can be added anything so all these functionalities can be written into java script and then it can be placed on your portal. But that are details which makes one product better than are the others.