

DocumentCloud.org Primer 1.7

Uploading:

To upload a new document, from the homepage click “Start Using DocumentCloud”. Then, in the first rail, select either “New Documents” for a single document or “New Project” for a bundle. Most file types are supported, including Word and PDF.

Before the upload begins, you must select a slug. Be judicious here because this is market facing. Upload. While it’s processing, which is displayed on the document’s icon, you cannot make any changes/edits.

Document sourcing and description:

To create or edit the general information for a document, from the “Edit” pulldown select “Edit Document Information”. The little pencil icon also launches this. Here, you must add a title (which serves as the headline), the source of the document, and description of the document. You also should add the URL of the article to which it is related and the document’s final published URL. The document’s access levels will be addressed in the section below on publishing.

Most of these fields here are for DocumentCloud use only, either for people using that site search or for Tribune users to find it within the DocumentCloud edit interface. But these are still critical pieces.

For the source, you should be as specific as possible to create consistency across all Tribune files and to maximize transparency. Examples: “Cook County State’s Attorney”, “Illinois Attorney General” or “U.S. Attorney’s Office”. For court filings, be sure to list who -- literally which side -- provided you with the document, such as “Blagojevich defense team”. For the description field, include a one-sentence summary of the document’s contents which includes its significance or use. Examples: “A motion by the U.S. Attorney’s Office seeking to prohibit Rod Blagojevich or his defense team from making public comments about the case” or “Notes from state investigators’ interviews with a teacher and a nurse’s aide regarding the 2009 death of Jeremiah Clark”.

Go live:

To make the document live, from the “Edit” pulldown select “Edit Document Information”. The little pencil icon also launches this. At the bottom of the window is the “Access Level” pulldown. There are three access levels – “private” (only the uploader can access it), “public” (fully market facing) and “Private to the Chicago Tribune”, meaning anyone at the Tribune can edit/annotate it but it won’t publicly display.

Again, don’t change to “Public” until you’re ready to go live since it’s also displayed on DocumentCloud.org.

Annotating:

To highlight information or add a bookmark, double click on the thumbnail or the slug, which launches the document in a new tab. To highlight an area or passage, select “Add a Public Note”. Draw a highlight

box around the text. This calls up a window in which you can add a headline and any additional notes. These notes will be bookmarked on the player, allowing a viewer to jump to them with that headline as the principal navigation.

To add table-of-contents-style navigation, select “Edit Sections”. You can headline certain sections via an open text field and corresponding page number. Much like notes, these also are bookmarked in the player. You can add or remove sections with the +/- controls. Note, be sure to double check that the page number you select aligns with the page number in the original file, as sometimes they get out of sync when PDFs are converted. Bug: Right now, the top section field always points to page 1 no matter what page is entered.

There’s no save function. Each time you add a note or section, it autosaves. When you close the tab, the document thumbnail shows a little highlight mark to indicate it has been annotated.

Redacting:

DocumentCloud’s latest version offers a redacting tool into the Document Tools section. Open the tool, use the mouse to draw a single rectangle around on the text, and then save the redaction. The related text also will be removed, but be sure to check in the “Text” tab to verify and make other deletions.

Manual: For sensitive documents, you also can work outside of DocumentCloud to redact. If you need to black out a name or fact, you should: Upload the file into DocumentCloud, import the file into PhotoShop, black out the fact(s), save as a PhotoShop PDF, open the original file DocumentCloud and select “insert/replace” pages under the Edit tab, then select your redacted page to upload and replace. Remember to make sure the actual text in the “Text” tab is also removed by using the Edit Page Text tool at the bottom of the right rail.

Adding/removing/reordering pages:

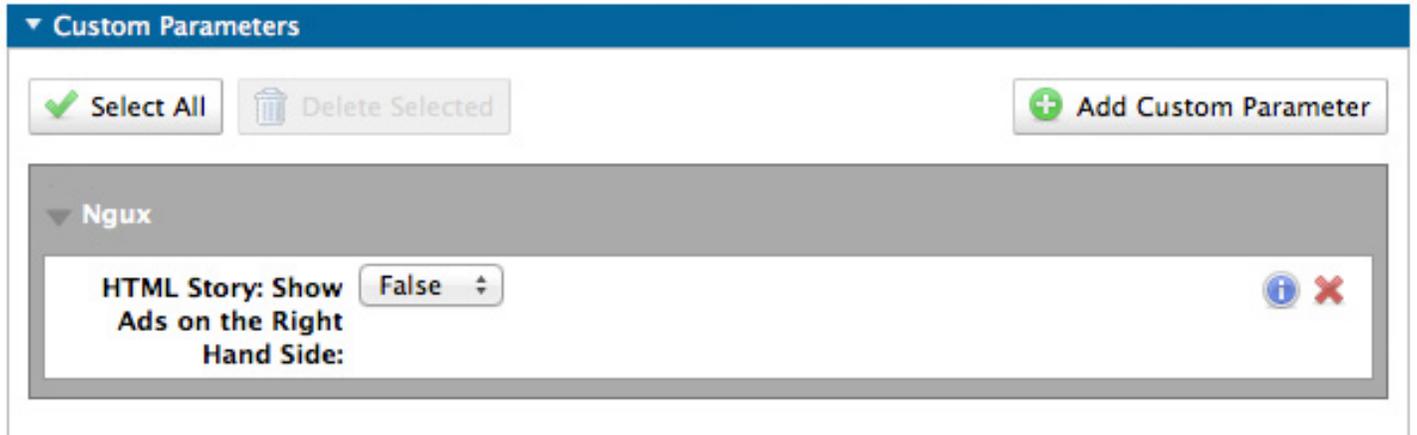
In the Page Tools section, you reorder and remove pages from a DocumentCloud content item. More powerful is the ability to compile several PDFs into a single PDF with the “Insert/Replace Pages” tool. To add a PDF, first choose a location in the window displaying all the pages of your document. Either select an existing page (which will be overwritten) or mouse over the desired area (such as adding a new page at the end) until you see a dashed vertical line. Then select “Upload Pages”.

Publishing:

First, make the document public (see above). Second, under the “Publish” tab select “Embed Document Viewer”. This will generate the embed code. First, enter related and published URLs. Then select fixed size, 900px by 700px. You also can have the document open to a page other than the first page here. Make sure you show both the sidebar and the text tab. Then grab your embed code.

Next, create an HTML story content item in P2P. Paste the embed code into the “HTML” field.

Next open the collapsed Custom Parameter window and select Add Custom Parameter. Scroll down to NGUX and open those options. Select “HTML Story: Show Ads on the Right Hand Side”. Then, from the pulldown, select “false.” The default is “true”.



Add a thumbnail to the slug.

Save and link it to the original story.

Publishing as notes:

Another publishing option is to embed only a section or several sections of annotations into a content item. You could augment or create a list, or just highlight a specific high-impact passage in a story, with each embedded note linking off to the embedded PDF (if all the document information fields are properly filled out).

Under the “Publish” tab, select “Embed a note”. Then choose the note from the pulldown and copy and paste the embed code. Be sure to paste the embed code at least five grafs down in the destination story file to avoid conflicts with the left rail of related assets.

If you haven’t annotated the PDF with notes in DocumentCloud, this feature is disabled.