dotBiz Infrastructure on SCMS for GAE

Content Author’s Manual

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|  | FOR INTERNAL USE ONLY - DO NOT DISTRIBUTE |

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**This is YOUR manual - add to it as you see fit!**

# Environments

The following table lists dotBiz environments. Throughout this document, site URLs are referenced as “**http://*<server>*/some/path**”. Replace “***<server>***” with the first URL listed in the **Valid URLs** column below for the desired environment (all URLs are CNAMEs of the appspot.com domain).

**Production** is the public site accessed by regular site users.

**Development** is used for testing of any sort. Content authors are encouraged to test new page layouts on the development server before publishing them on production. Note that back-end code testing may occasionally leave the development server in an unusable state.

**Offline Dev** applies only to back-end developer use of GAE’s dev app server.

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| **Environment** | **Valid URLs** |
| Production | rocketeria.biz  www.rocketeria.biz  dotbiz-prod.rocketeria.biz  appspot.com/dotbiz-prod |
| Development | dotbiz-dev.rocketeria.biz  appspot.com/dotbiz-dev |
| Offline Dev | 127.0.0.1:8080 (default) |

# About The Site

## What is Google App Engine (GAE)?

In [their own words](https://developers.google.com/appengine/docs/whatisgoogleappengine):

*Google App Engine is a Platform as a Service (PaaS) offering that lets you build and run applications on Google’s infrastructure.*

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In short, GAE hosts the web application (SCMS) that allows staff to create and publish web content, and the web servers that allow the public to access that content from a web browser. They charge Rocketeria based on how much traffic the servers get, and how much storage is used. The pricing is reasonable and includes a generous free tier, meaning that the website may exist free of charge for quite some time. [Read more about GAE pricing](https://developers.google.com/appengine/pricing).

## What is the Simple Content Management System (SCMS)?

It is the back-end code (python, in this case) that allows everyone to interface with the data that makes up the website. It is a Content Management System like any other - WordPress, Django, Joomla, etc - except it was written just for Rocketeria. This means a few things. The bad: as compared to mainstream CMS, it lacks features, has not been “road tested”, and is not portable (must be hosted on GAE). The good: compared to mainstream CMS, it has a much smaller, easier to maintain code base, a simple interface void of useless features, is light on server resources (read: cheap to host), and can be extended and customized without the limits imposed by “plugin” or “module” based systems.

The terms “dotBiz”, “CMS”, “web app”, and “web site” are largely used interchangeably throughout this document.

# User Management

## Authentication

SCMS uses GAE *Federated Login* for authentication. Currently, only Google login is implemented.

### Log In To dotBiz

To log in to the web app, browse to **http://*<server>*/enableadmin**

If there is already a Google Account session active in the web browser (e.g., user is logged in to gMail, YouTube, Blogger, etc), that session will be used and no credentials will need to be entered. If there is no existing Google account session in the current web browser, a pop-up window will prompt for a Google username and password.

When logging in for the first time, Google will prompt the user to allow the app (“dotbiz-dev” or “dotbiz-prod”) limited access to their Google account.

After authenticating successfully, the user is redirected to the home page.

### Log Off of dotBiz

Users that are authorized as administrators will have a fixed blue bar at the bottom of their web browser. Click “Disable Admin” to terminate the session with dotBiz. Note that this will *also* end the associated Google Apps session (this behavior is new - prior to the site going live on 9/1/2014, ending the dotBiz session did *not* end the associated Google Apps session).

## Authorization

Any Google user can authenticate to the site, but only authorized users will be able to perform administrative functions. If a user who has not been given admin rights logs in to the site, nothing will appear different (no Admin Bar) and the user will not have any means to modify content.

### Add a New Content Author

Before proceeding, note that there is currently no distinction between a content author and an administrator of the web app. The instructions that follow are necessary to allow content authorship, but also grant the user access to the hosting control panel, from which considerably more damage can be done.

1. Log in to a Google account that is already an administrator on the desired server
2. Browse to <https://appengine.google.com/>
3. Under “My Applications”, click the desired server, e.g. “dotbiz-prod”
4. In the left-hand navigation pane, click “Permissions” (under the “Administration” heading)
5. In the “Invite a user to collaborate on this application” section, enter the new user’s Google email address
6. Set the “Roll” option to “viewer”
7. Click “Invite User”

The user will be sent an email inviting them to collaborate on the application. Once they accept the invite, they will be authorized to perform administrative functions on the site.

All content authors are strongly encouraged to enable 2-factor verification on their Google accounts. [Read about 2-Factor Verification](http://www.google.com/landing/2step/). [Click here to set it up!](https://accounts.google.com/b/0/SmsAuthSettings)

Remove a New Content Author

To revoke a user’s ability to modify the site, Follow steps 1-4 in the “Add a New Content Author” section above. On the Permissions page, click the “Remove” button corresponding to the user that should no longer be allowed access.

## Future Capability Options

* Non-administrative content authors could be implemented. Permissions could be further restricted to allow users or groups of users rights to modify specific pages.
* Additional login providers could be added in the future (Yahoo, Facebook, OpenID, etc).
* Additional authentication points (besides “enableadmin”) could be added if, e.g., some future function needs to be available to non-admin users.

# The Admin Bar

Authenticated users that are authorized administrators will have a fixed blue bar appear at the bottom of their screen while browsing the site. This is henceforth referred to as the ‘admin bar’. The admin bar contains links to perform administrative actions on the site. Links are context-sensitive and will change to reflect actions available on various pages, e.g., only editable pages will have the “Edit This” link.

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| *Admin Bar on non-editable page* |

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| *Admin Bar on editable page* |

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| *Admin Bar while editing or creating a page* |

# Create a New Page

Content Authors can create new pages within the framework (header, footer & sidebar) of the site and save those pages to arbitrary URIs.

1. Authenticate as an administrative user. Content authors are encouraged to test new pages the development server before publishing them on the production server.
2. Click ‘Create New” in the admin bar. A new, blank page will open.
3. Click in the green box where the text, “Click here to begin editing” appears. The inline WYSIWIG editor will pop up.
4. Enter the page content as it should be displayed to viewers. An overview of the editor is available in the [Inline WYSIWYG Editor Overview](#_psj95usa3s2g) section.
5. When finished editing, enter a path in the “Save to” text box of the admin bar. This is the path that visitors will use to access the new page, e.g., if “**newpage**” is entered, users will view the content at **http://*<server>*/newpage**. Please review the [Expected Behavior of Named Resources](#_pgo5wk8k3evg) section immediately below!
6. Click “Save”. The browser is redirected to the new page.

## Expected Behavior of Named Resources

This section provides guidance for naming resources such as new pages and uploaded files. Failing to adhere to these guidelines may result in resources becoming inaccessible from a web browser or lost entirely.

* When creating a new page, there is no need to enter any file extension. E.g., enter “**new-page**”, not, “**new-page.html**”.
* When creating a new page, arbitrary containers may be added to the URI to create a faux hierarchy, e.g., the text “**special-offers/lessons/summer2015**” could be entered to make the content available at **http://*<server>*/special-offers/lessons/summer2015**.
* Paths will be URL-encoded if non-URL-safe characters are used, e.g., if the text “**Fools&Horses Interview**” is entered, the content will be available at **http://*<server>*/Fools%26Horses%20Interview**.
  + [URL-safe characters](http://www.ietf.org/rfc/rfc3986.txt) include: uppercase and lowercase letters, decimal digits, hyphen, period, underscore, and tilde.
  + For readability and compatibility, use simple words with hyphens or underscores whenever possible.
* If the path entered already exists as a page, the existing page will be overwritten by the new content without warning.
* Parent containers of a path will not overwrite pages of the same name, e.g., “**lessons/policy**” would *not* overwrite or otherwise conflict with a page called “**lessons**”.

# Edit a Page

Content Authors can edit page content and, optionally, copy the page to a new URL. Note that not all pages are editable via the web. Certain key pages are intentionally uneditable to avoid accidental loss of fundamental areas of the website. To modify one of these pages, please email [kyle@rocketeria.biz](mailto:kyle@rocketeria.biz).

## Modifying Page Content

1. Authenticate as an administrative user. Content authors are encouraged to test page modifications on the development server before publishing them on the production server.
2. Navigate to an editable page. The Admin Bar will display the “Edit This” link on all editable pages.
3. Click “Edit This” on the Admin Bar. A green box appears around any editable content. Some pages may have multiple editable sections.
4. Make changes
5. Click “Save” in the Admin Bar

### Page Titles and Title Bars

Page titles are directly editable text in edit mode. Page titles can be any string of text and do not need to mirror or relate to the URI in the “Save to” field. Additionally, the page title bar color can be changed by clicking the title bar while in edit mode. There may be a short delay between clicking the bar and observing the color change.

The text entered here is also used in the page title that appears in the browser’s tabs and history. While the text is converted to uppercase for display on the colored bar, it will appear as typed (case-sensitive) in the browser’s tabs and history. Best practice is to use [Title Case](http://grammar.about.com/od/grammarfaq/f/capitalstitle.htm) when entering a page title.

For consistency with the home page color scheme, the following title bars cannot have their color changed: Store, Lessons, Rentals, Events, Testimonials. Title text on these pages is editable.

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| Editing page header text, and clicking to cycle through colors |

## Copying a Page

1. Authenticate as an administrative user. Content authors are encouraged to test page modifications on the development server before publishing them on the production server.
2. Navigate to an editable page. The Admin Bar will display the “Edit This” link on all editable pages.
3. Click “Edit This” on the Admin Bar.
4. Change the text in the Admin Bar’s “Save to” field to the desired new page name. Recall the restrictions and best practices laid out in the [Expected Behavior of Named Resources](#_pgo5wk8k3evg) section.
5. Click “Save” in the Admin Bar. Both the previous URL and new URL are now valid and can be edited independently.

## Moving (Renaming) a Page

To “rename” a page, simply copy the page to a new URL, then delete the old page.

1. Follow the [Copying a Page](#_tq89wvwntrfc) section in its entirety.
2. Browse to the original page URL
3. Follow the [Delete a Page](#_8r4funufda1m) section in its entirety.

## Inline WYSIWYG Editor Overview

The inline editor is a customized ckeditor instance with standard functions and icons. Hover over each icon (in the actual editor, not the figure below) to determine its function.

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| *The in-line editor* |

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| *Editing a new page* |

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### Paragraph Headings

The style drop down is the recommended way to create headings. The drop down is found towards the bottom-right of the pop-up editor, and reads, “Normal” by default. Use options “Heading1,” “Heading2,” and “Heading3”.

#### Pasting contents from other websites or documents

It is best practice to remove all formatting from text before pasting it into the site editor.

Use the “Paste as plain text” button  in the editor to accomplish this.

#### Making Buttons

Links can be turned in to high-visibility buttons.

1. Create a link anywhere on the page using the link button on the editor
2. Select the link text and click the Style dropdown on the editor
3. Under the Object Styles heading, select the desired Button style

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| *Turning standard links into Buttons* |

#### Link Portability Best Practice

When adding links and images to the website itself (as opposed to linking to the website from an external page like Facebook), relative paths are always preferable to absolute paths. This makes it easier to move content between the different environments. To enter relative path links, when creating a link or adding an image that was uploaded to the rocketeria server, simply remove “http://<[environment](#_6dt5ago8n9on)>” from the address, leaving a forward slash and the resource name, e.g., “/store/guitars”, or, “/dres/guitar.jpg”. In the link editor, the Protocol field will automatically change from “http://” to “<other>”.

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| *A relative path (right) is always preferable to an absolute link (left) when adding links or images* |

#### Link: Undecorate

Except for faux buttons (as described [above](#_9y5slr2jpgf4)), all anchors (links) in the body of the site will be underlined, per the site’s style definitions. A special editor style exists to remove the underline for circumstances in which a link is more appealing without it. To remove the underline:

1. In edit mode, highlight the link precisely - do not include adjacent spaces or punctuation that is not part of the link text.
2. Click the Style drop down in the Editor
3. Under the Object Styles heading, select Link: Undecorate

#### Link: Clickable Cell

The “Link: Clickable Cell” style causes the “clickable” area of a link to expand laterally (and *not* vertically) to fill its container, e.g., if this style is applied to a link within a table cell, the entire cell will be clickable. This style also applies the Undecorate style as described in the [Link: Undecorate section](#_ilr0xbhvgwoj). To use this feature:

1. In edit mode, highlight the link precisely
2. Click the Style drop down in the Editor
3. Under the Object Styles heading, select Link: Clickable Cell

To include the area above and below a link (vertical expansion of the clickable area), use the following procedure:

1. In edit mode, type the word or string that is to become a link. If the text is already a link, break it using the Unlink button in the editor.
2. Place the cursor directly in front of the first character of the text
3. Press Space, then Shift+Enter (repeat this step to add additional lines above the text)
4. Place the cursor directly behind the last character of the text
5. Press Shift+Enter, then Space (repeat this step to add additional lines below the text)
6. Select the entire column of text, making sure to include the spaces entered in the above steps
7. Use the Link button to create a link. If the single space characters above and below the text do not become underlined when the link is created, break the link and try selecting the text and creating the link again.
8. With the text still selected, select Link: Clickable Cell from the style drop down. The underlines should disappear from the highlighted area. If an extra new line appears below the link area, place the cursor on this line and press Backspace once to delete it.
9. Save the current page. Once the page refreshes out of Edit mode, confirm that the intended area is clickable.

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| *Using a multi-line link to create a multi-line clickable cell* |

#### Colors, Geometry, & Other Style

See the [Content Style Guide](https://docs.google.com/a/rocketeria.biz/document/d/1--gH9MpuhBnT3PWiCbZbPytFUtzRBWDqJ8HL1NhQO7w/edit?usp=sharing) for information on site colors, fonts and geometry.

### Inserting an image hosted somewhere else

1. Copy the URL of the image to insert, e.g., https://gazette.net/community.jpg
2. Click in an editable area to reveal the editor
3. Click the image button on the editor:



The Image Properties dialog appears.

1. Paste the URL in the “URL” field of the Image Properties dialog
2. Maybe any desired modifications to the size, padding, border, or link, then click **OK**

### Uploading and inserting an image

1. Upload an image to GCS as directed in the [Admin Upload Utility](#_bnnuwzutxe27) section, making sure to copy the provided URI
2. Insert the image using the [Inserting an image hosted somewhere else](#_wmuavny3b4et) section above

# Delete a Page

Content authors can delete most editable pages.

1. Authenticate as an administrative user.
2. Navigate to a removable page. The Admin Bar will display the “Delete This” link on all removable pages.
3. Click “Delete This” on the Admin Bar
4. Click “yes” in the confirmation pop-up

To protect the main areas of the website, the following pages cannot be deleted through the standard interface: Lessons, Store, Rentals, Repairs, Events, About, Contact. The delete button will not appear in the Admin Bar on these pages.

## Future Capability Options

* Pages can be added to or removed from the “un-deletable” list at any time

# Upload a File

Content Authors can upload arbitrary files to [Google Cloud Storage](https://cloud.google.com/products/cloud-storage/) (GCS) to be served from a rocketeria URI.

## GCS Billing Reminder

GCS bills monthly based on how much data is accessed, how frequently data is accessed, and how much data is stored in the service. Pricing is more than reasonable, but content authors are nonetheless encouraged to:

* Refrain from dumping large quantities of data solely for storage
* Occasionally browse the storage and delete files that are no longer needed. See [Browsing the Blobstore/GCS](#_cb6kvor3nipc).

[Read more about GCS Pricing.](https://developers.google.com/storage/pricing)

## Admin Upload Utility

1. Authenticate as an administrative user.
2. Click the “Upload File” link on the Admin Bar. The link appears on the admin bar at all times.
3. A pop-up window will open. Click “Choose File”
4. Navigate to the desired file
5. Click “Upload”. The process may take several minutes of the file is large.
6. On the Success page, select and copy the URI in the green bar. This is the URI that should be used to access the uploaded file.
7. Click “Close Window” or “Upload Another”

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| *Upload utility with file selected* | *Upload utility after successful upload* |

# **Future Capability Options**

* A multiple file upload form

# Manage the Alert Banner

SCMS includes a utility to add a high-visibility banner to the home page. The appearance of the banner can be customized to a degree, and optionally the banner can be set to automatically expire after a given day.

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| *The home page with the default banner active* |

A content author can enable, disable, or modify the alert banner. Content authors are encouraged to new banner settings on the development server before publishing them to the production server.

1. Authenticate as an administrative user.
2. Click the “Alert Banner” link on the Admin Bar. The link appears at all times except when editing a page.
3. The Alert Banner Settings popup appears. Make changes as desired.
4. Click “Go Live”

## Alert Banner Options

The banner settings utility features a full-size preview that updates in real time as settings are chosen.

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| *Alert Banner Settings utility with default options* |

### State (Enabling and Disabling the banner)

Select “On” to enable the banner with the selected settings

Select “Off” to disable the banner

### Background

Selects the background color of the banner. All colors feature subtle animated stripes except for “plain”

### Text

Selects the color of the banner text

### Override Header “Hours Today” (optional)

This field can be used to replace the hours posted in the website header. The header text is generated based solely on the day of the week, so the header will read, e.g., “Hours Today: 11-4” on *every* Monday including holidays and inclement weather closings. To avoid confusing visitors with mixes messages, populate this field.

When this field is filled out, for as long as the banner is live, the website header will read, “Hours Today: “ + <text entered here>, i.e., enter “CLOSED” to have the header read “Hours Today: CLOSED”, or enter “11-4” to have the banner read, “Hours Today: 11-4”.

Leave this field blank if the standard store hours should remain unchanged.

### Expire On (optional)

This field is used to specify the date on which the banner should no longer be displayed. Clicking this field pops up a calendar. The banner disappears at the start of the selected day, e.g., if 20/08/2014 is selected, the banner will cease to be shown at 00:00:00 EST August 20th, 2014. Therefore, to create a banner that is valid for *today* only, select *tomorrow* on the calendar.

Note:

* The banner disappears at midnight Eastern Time at the start of the selected day
* After selecting a date on the pop-up calendar, the text field is populated with the international form of the date (day/month/year), not the US-form, e.g., July 10 is “10/7”, not “7/10”.

If the Expire On field is left blank, the banner will remain until it is disabled by changing the State to Off and clicking “Go Live”.

### Editing Banner Text

The text in the banner preview can be edited directly. The text in this field when “Go Live” is clicked will be the text that is published to the site.

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| *Editing banner text, with example non-default appearance* |

**Future Capability Options**

* Banner could appear on all pages instead of just the home page
* Banner expiration could be down to the hour instead of to the day
* Additional appearance options

# Testimonials Page & Quote Feed

The testimonials page at **http://*<server>*/testimonials** contains special blocks and labels that allow content authors to specify pieces of text for display in the blue “Testimonials” tiles that appear on the homepage and sidebar.

Editing this page requires extra care and attention to detail. Mistakes here can have undesirable effects on the “Testimonials” tile of the homepage and sidebar!

## Adding a new testimonial

1. Authenticate as an administrative user
2. Browse to **http://*<server>*/testimonials** and click “Edit This” in the admin bar
3. Place the cursor before the first letter of the first sentence of the first testimonial and press Enter. A horizontal line appears, indicating that a new special Testimonial block has been created above.
4. Press the Up arrow or click just above the new horizontal line
5. Type or [paste as plain text](#_1swxpih293bj) the new testimonial. Use Shift+Enter to create line breaks. If pasted content creates additional undesirable blocks with horizontal lines, use the Backspace key to rejoin the paragraphs, then use Shift+Enter to recreate the break.
6. If part(s) of the new testimonial should be included in the blue Testimonial tile contents, continue to the [Adding to the Quote Feed](#_lr2ckfgq609k) section below. Otherwise, click Save.

## Adding to the Quote Feed (Testimonials Tile)

The Testimonials tiles throughout the website are populated by special “quote feed” labels on the main Testimonials page. Each time a page with a Testimonials tile is loaded, a quote feed item is selected at random and inserted into the tile.

To add new text to the pool of quotes:

1. Enter Edit mode on the Testimonials page
2. Select a bit of text
3. In the Style dropdown of the popup editor, select “Quote Feed”. A faint blue line appears around the selected text.
4. Click Save.

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| *Applying the Quote Feed label to a selection of a larger testimonial* |

## Testimonial/Quote Feed FAQ:

Q: Can everyone see these blue lines around the quote feed text?

A: No, the blue lines are only visible in administrative edit mode.

Q: How do I know how much text to select?

A: Think of it like a Tweet - about 140 to 160 characters is best. Note that the Testimonials tile on the sidebar is smaller than the one on the home page.

Q: Do I need to put quotes around the text I select?

A: No, the Tiles add quotes automatically, and the selected text must *not* contain quotes, or else they will appear as double quotes on the tiles.

Q: Can I add an attribution to a feed quote?

A: The only way to include attribution in a feed quote is to include the attribution in the feed quote selection, meaning there cannot be any text between the end of the desired quote and the attribution. A more flexible solution could be implemented as a future enhancement.

# GAE Backend Functions

The [Google App Engine Console](https://appengine.google.com/), The [Google Developer Console](https://console.developers.google.com/), and the [Google APIs Console](https://code.google.com/apis/console/b/0/?noredirect&pli=1#project:875831580489:access) provide low-level access to the inner workings of the application. Content authors can access these areas (see the [User Management](#_vdpqpxilcypk) section’s [Future Capability Options](#_fxq9uaz2fs5u)) but will rarely need to do so.

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| **These web consoles can be used to irreversibly delete the site, access billing information, and modify services that cost Rocketeria money.**  **To prevent data loss and downtime, content authors must perform only the specific tasks documented in this section, and must not attempt to use other features.** |

## Browsing the Datastore

The Datastore is where all dynamic (read: editable) bits of the website live. Whenever a new page is created by a content author, the page content is stored here.

1. Authenticate as an administrative user
2. Browse to <https://appengine.google.com/>
3. If multiple applications are listed, choose the desired environment (see [Environments](#_6dt5ago8n9on))
4. In the left-hand navigation pane, click “Datastore Viewer” under the Data heading.

The Page Entities table lists all existing entries. The ID/Name column provides the url at which the page is accessible, e.g., an entity listed as “name=bacon” would be accessible at **http://*<server>*/bacon**.

### Deleting items

Only users with administrative access *to the application backend* can delete items via the Datastore viewer. In general, content authors should not have this access (see disclaimer under [GAE Backend Functions](#_pwybzfhwvfdk)).

To remove undesired pages discovered while browsing the Datastore, navigate to the live version of the undesired page and follow the instructions in the [Delete a Page](#_1ioelv3rjyo8) section.

## Browsing the Blobstore/GCS

The Blobstore, AKA GCS, is where all uploaded files are kept.

1. Authenticate as an administrative user
2. Browse to <https://console.developers.google.com/project>
3. If multiple applications are listed, choose the desired environment (see [Environments](#_6dt5ago8n9on))
4. In the left-hand navigation pane, click “Cloud Storage”
5. Under Cloud Storage click “Storage Browser”
6. Click the desired bucket in the main pane. By default, all resources will be under “dres”

All files in GCS will be listed. Click a file name to open or download it.

### Deleting items

This action is irreversible. Proceed with care.

1. Check the box next to one or more elements
2. Click Delete Object(s)
3. Click OK, and click OK in the pop-up confirmation

# File a Bug

The quick way to file a bug is to email [kyle@rocketeria.biz](mailto:kyle@rocketeria.biz). Copy/paste the following into the email and answer as best you can:

|  |  |
| --- | --- |
| The day and time was... | <e.g., “5/6/14, about noon”> |
| I was on this url: | <(copy from browser) e.g. “http://rocketeria.biz/modify/new”> |
| I clicked the... | <e.g., “Save button”, or N/A> |
| I expected that... | <e.g. “my new page would be published”> |
| But what I saw was... | <e.g., “the screen went blank. When I refreshed, it said 500 Internal Server Error”> |
| I restarted the browser, tried again, and got the same result | ☑ YES  ☐ YES |
| You should also know that... | <e.g., “My internet connection dropped while creating the page”> |

Alternatively, be a super cool kid and [open an issue on Github](https://github.com/modalexii/Rocketeria/issues) :)

# FAQ

This section aims to answer expected or common questions pertinent to content authorship. Questions are extra-verbose to facilitate searching in the event that this section grows long.

**Q.** How can I find a page I’ve forgotten the name of? How can I see a list of all pages that exist?

**A.** Follow the instructions in [Browsing the Datastore](#_8k1hziqpmx91)

**Q.** How can I find a file (picture, image) I’ve forgotten the name of? How can I see a list of all files that have been uploaded?

**A.** Follow the instructions in [Browsing the Blobstore/GCS](#_qe2b7l1kimes)