

PĀTAKA KŌRERO

Quick Start guide and walkthrough of the front end user interface of the pātaka system

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Introduction

The Pātaka Kōrero is split into two websites, a back-end portal where users upload and manage their content and a front end user interface for searching, filtering and viewing content. For information about the back-end portal, please see its help section by clicking the help button on this page <https://portal.patakakorero.co.nz>.

This guide will help you get started using the front end user interface of the Pātaka Kōrero by covering some of its key features and functionality, including;

- Basic page layout
- Website navigation
- Searching and filtering content
- Viewing and sharing content
- Creating an account and signing in
- Requesting access to private content
- Updating your account details
- Sending and receiving messages

The front end has been developed so everybody can search, filter and interact with uploaded content in relevant and familiar ways, including keyword searching, interactive maps, timelines of events and graphs of linked content contexts¹ such as whakapapa relationships.

Users with accounts can also save their favourite content and request access to private content, which owners may share after the user has agreed to any terms of release. They can also send and receive messages from other users and, in the future, will be able to upload content through the front end as well.

Finally, the front end and the portal are still in active development and may change over time. Thank you for being part of this Pātaka Kōrero; we can't wait to see what you create!

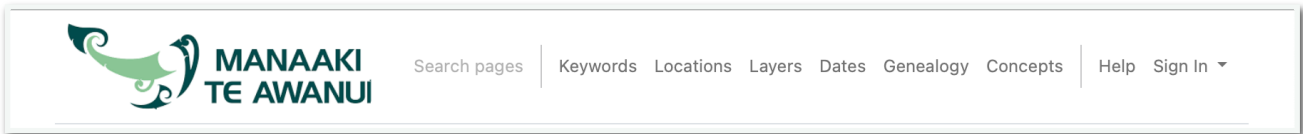
Tip

If you encounter any bugs or have feedback, the centre right extreme of every page has a handy Feedback button which will guide you through getting in touch with someone who can help.

¹ Information that adds context and meaning to uploaded content, for example, related people, places and dates.

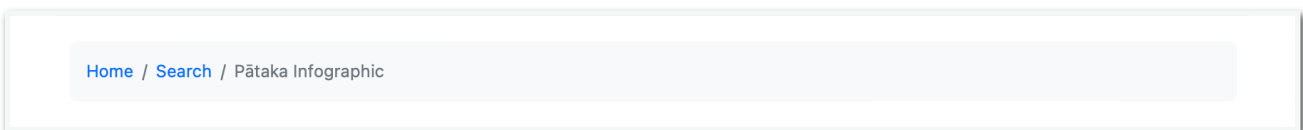
Basic page layout

Every page on the website is divided into at least four parts;



Header

This provides a consistent link to the home page, various search pages, the help section and the account dropdown, which has further links for signing in or creating an account.



Breadcrumb

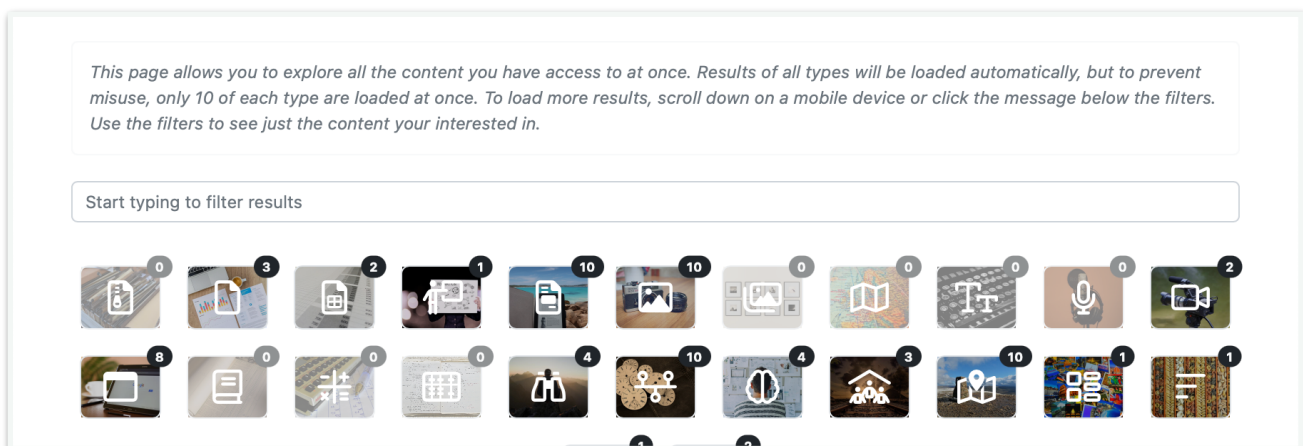
This section updates as you navigate the site to show where you are and provide a link to the page or section you just navigated from.

Tip

The current page (the greyed out text) is never clickable, but the previous page sections are. Clicking them will navigate you to those pages. You can also site logo in the top right corner, to be taken back to the home page.

This page allows you to explore all the content you have access to at once. Results of all types will be loaded automatically, but to prevent misuse, only 10 of each type are loaded at once. To load more results, scroll down on a mobile device or click the message below the filters. Use the filters to see just the content your interested in.

Start typing to filter results



Body

This section changes depending on what page you are currently on. For the search pages, always starts with instructions on how to interact with the page and a search input field for filtering the

results shown by keywords. Some of the search pages include the results type filtering grid (shown above) by default, while others will show up only once you have interacted with the page.

Tip

To scroll up or down when the body content exceeds the maximum page height, ensure you are scrolling *within* the main content section. Scrolling on the empty page margins to either side of this area will not work.

Copyright © Manaaki Te Awanui 2022

Footer

This section shows the copyright information for this website.

Tip

This section will always be visible even if there if the content is taller than the page height. You may need to scroll down to view new content as its loaded.

Website navigation

The front end of the site is divided up into several sections;

Home page

This page is the entry point for most people when they first visit the site; it includes a short introduction text and link buttons to the search pages.

The search pages

These pages enable users to search, filter and interact with content added through the portal.

Tip

The search pages all have some basic instructions on how to use them included at the top of the page.

Currently, there are five live search pages, with more on the way;

Keywords

This page allows you to explore all the content you have access to at once. Results of all types will be loaded automatically, but to prevent misuse, only 10 of each type are loaded at once. To load more results, scroll down on a mobile device or click the message below the filters. Use the filters to see just the content you're interested in.

Start typing to filter results

0 3 2 1 10 10 0 0 0 0 2

8 0 0 0 4 10 4 3 10 1 1

1 2

LOCAL STORAGE | REFERENCE | DATA CENTRE | SECURITY STORAGE

TE HĀHU O HIRAKI 2021 | NGĀ TOHU

TE HĀHU O HIRAKI 2021 | NGĀ TOHU

Ehara i te nama noa
Working with Cultural Indicators

Feedback

This search page allows users to search for content using words and phrases that have been added either in the title or description of the uploaded content. Users can also explore content without entering any search terms and can use the type buttons to filter specific types of content they want to see.

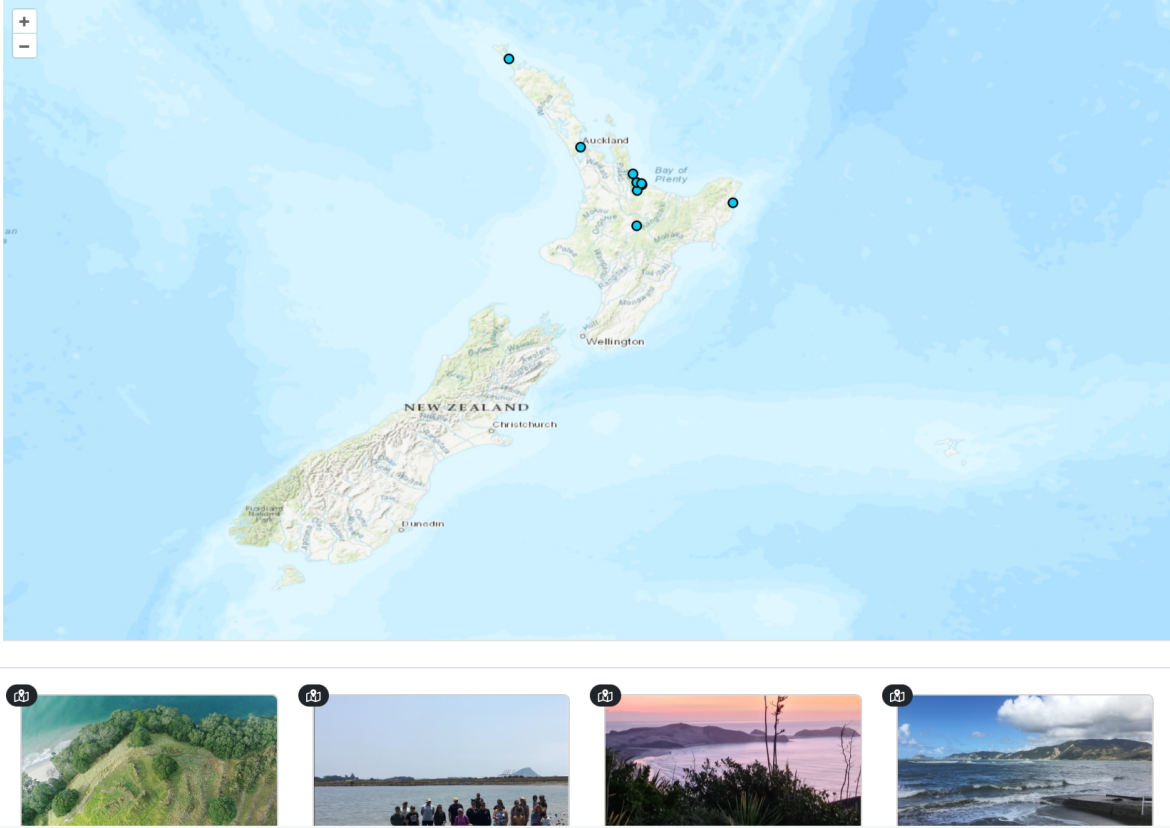
Tip

For performance reasons, only the first 10 results of each type of content is loaded on this page. To load more either scroll down, or click the link at the bottom of the *loaded* content.

Locations

This page allows you to explore locations and their associated content. Drag and zoom the map to find locations your interested in. Selecting any location will cause associated content to be loaded. Use the filters to see just the content your interested in.

Start typing to filter results



The image shows a user interface for exploring locations in New Zealand. At the top, there is a text box explaining the page's purpose: "This page allows you to explore locations and their associated content. Drag and zoom the map to find locations your interested in. Selecting any location will cause associated content to be loaded. Use the filters to see just the content your interested in." Below this is a search bar with the placeholder text "Start typing to filter results". The main feature is a map of New Zealand with several blue location pins. Below the map, there are four thumbnail images of scenic views, each with a location pin icon. A "Feedback" button is located on the right side of the map area.

This search page allows users to explore content that has been “tagged” to a location or area.

Users can interact with the map by scrolling or using the zoom buttons on the left. As the map is zoomed, locations will be filtered to show only those in that area.

Hovering over a map pin (the blue circles) will show a preview of the location on the right.

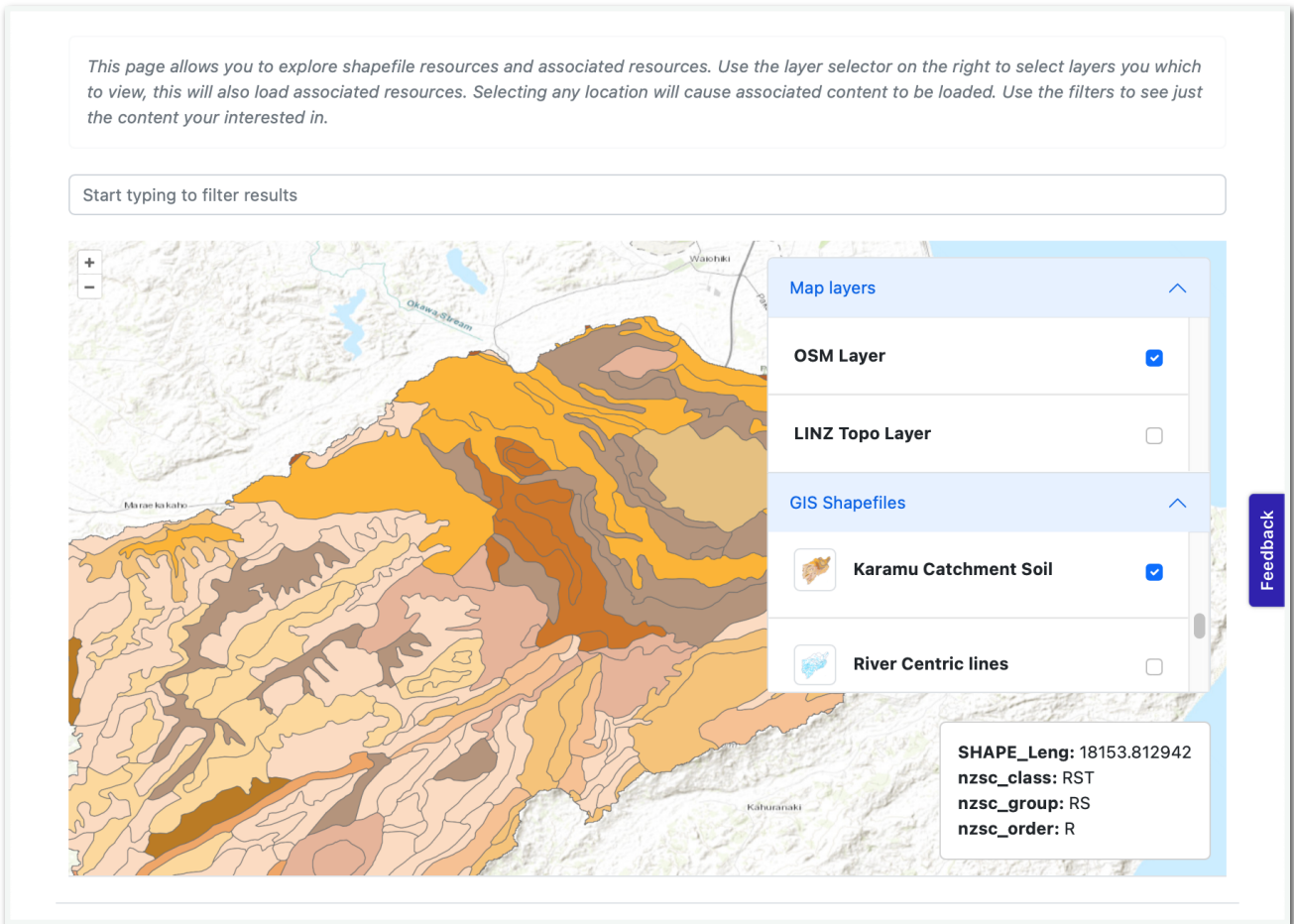
Clicking on a location will cause content “tagged” to that location to be loaded below the map (you may need to scroll to see this).

The content can be further filtered using the type buttons. Entering a search term into the search bar will filter *both* the locations shown on the map and any loaded content.

Tip

If you are trying to scroll down to see the content and getting stuck scrolling the map, try scrolling just outside the map area, or above or below the map.

Layers



This search page allows users to explore shape file layers, locations that exist within their area, and content tagged to those locations.

Users can interact with the map by scrolling or using the zoom buttons on the left.

The right-hand side of the map has a scrollable menu that shows all the uploaded GIS shape files and a switch to toggle them off and off.

It also includes options to change the map base layer between OSM and the LINZ Topography Layer.

Turning on one of the Shapefiles renders it onto the map alongside any associated locations, displayed as blue dots.

Hovering on the shape file will display information about the layer in the bottom right corner. Hovering over a location pin will show a preview of the location in the bottom left corner.

Clicking on a location will cause content “tagged” to that location to be loaded below the map (you may need to scroll to see this).

The content can be further filtered using the type buttons. Entering a search term into the search bar will filter *both* the locations shown on the map and any loaded content.

Tip

Shapefiles will be layered in the order they were switched on, make sure you don't lose smaller shapes under larger ones!

Dates

This page allows you to explore key dates and associated content. If the available dates span more than a month, they are grouped by the largest period between them, select a period to expand it. Selecting any period or date will cause associated content to be loaded. Use the filters to see just the content your interested in.

Start typing to filter results

December 2021¹ November 2021¹ 2021⁵ 2022⁵ October 2021¹ September 2021¹ undefined 2021¹
Sep 7, 2021

Whā o Mahuru 2021

Feedback

This search page allows users to explore content related to specific dates and periods.

All date records are automatically grouped into an arrangement of buttons that expand as selections are made.

The groupings will always start with the most significant spacing between, so events that happened years apart will be grouped into their respective millennia/centuries/decade. Then all the dates within the selected period are regrouped on the following line when a selection is made. This continues until the shown dates fall within the same period (aka, they can not be grouped further).

The content associated with those dates will also be filtered as the date records are narrowed by selection.

The associated content can be further filtered using the type buttons. Entering a search term into the search bar will filter *both* the dates and any loaded content.

Genealogy

This page allows you to explore genealogical relationships and their associated content. If there are too many nodes to display, the zoom control can be used to scale the tree. Click on a node in the tree to select it, this will open a snapshot of all the downstream nodes and load their associated content. Use the filters to see just the content you are interested in.

Start typing to filter results

0% zoom 100% zoom

The diagram illustrates a genealogical tree. At the top is a node labeled 'Tautoru o Matariki' with a blue circular logo. Below it are two nodes: 'Tau Tuarua' (left) and 'Tau Tuatoru' (right), both with orange circular logos. Below 'Tau Tuarua' is a larger, detailed map showing various locations: PIPIRI, HEBE YURI, O PIPIRI, HAKATIA, MARIKURU, PAENGAWHAHI, and KOFOU. The map is labeled 'Tau Tuarua' at the bottom. A zoom slider is positioned above the tree, ranging from 0% to 100%. A search bar is located above the zoom slider. A 'Feedback' button is on the right side of the interface.

This search page allows users to explore content related to genealogical relationships.

These relationships are rendered in an interactive family tree format.

Multiple genealogical relationships can be rendered at once on this page; if there are too many to display inline, the graph will display a scrollbar below users can drag to scroll horizontally.

The zoom slider above the graph can be dragged to rescale it, making it easier to navigate.

Clicking any node² in any of the trees will cause content connected with the clicked node and *any below it* to be loaded and displayed below. Clicking again will deselect the current node and clear any associated content.

The content can be further filtered using the type buttons. Entering a search term into the search bar will filter *both* the loaded nodes and any loaded content.

² An element of the tree, for example, “Tau Tuarua” as shown.

Account pages

These pages allow users to update their accounts, see resources that have been shared with them and groups and organisations they are part of, send and receive messages.

Profile

The screenshot shows a user profile page with the following sections:

- User Account:** A placeholder for a profile picture with the text "User Account" below it.
- Update password:** A section with two input fields: "Enter new password" and "Repeat new password", followed by a green "Update Password" button.
- Groups:** An input field with the label "Groups".
- Organizations:** An input field with the label "Organizations".
- Personal Details:** A large form area containing:
 - Firstname:** Input field with "Aaron", followed by the text "The firstname of this user".
 - Firstname:** Input field with "Cole", followed by the text "The lastname of this user".
 - Username:** Input field with "imauser", followed by the text "The username of this user".
 - Email:** Input field with "user@patakakorero.co.nz", followed by the text "The email of this user".
 - A green "Update Profile" button.
- Releases:** An input field with the label "Releases".
- Feedback:** A vertical blue button labeled "Feedback" on the right side.

This page gives users an overview of their details and allows them to be updated.

They can also see what organisations and groups they are a part of, see content that has been shared with them, and update their passwords.

Groups and organisations users are a part of will be shown in the groups and organisation sections. Users cannot remove themselves or request access to groups or organisations in the front end.

Content that has been shared will be displayed under the Releases section. Entries will include any terms of use and a link to the content.

Favourites

Start typing to filter results

Pātaka Infographic

Here o Pipiri (2021) - Manaaki Te Awanui

Te Wānanga Roa

Feedback

This page allows signed-in users to view all the content they have marked as a favourite on the front end. They can use the search input field and the type filters to search for the specific content of content types.

Messages

Conversations

kelly@teawanui.com

Messages

Pumahara Summary
Far this one is pretty cool :)
Oct 13, 2022, 9:33:08 AM

Pumahara Summary
Thanks we think so too! :)
Oct 13, 2022, 9:54:26 AM

Kia ora Kelly_Ratana,
You have lost access to Te Umairangi - Asian Paddle Crab Catching Methods, this is ether because your access has expired - or the owner has removed it.
If you believe this is in error, please contact the owner again to request access reinstatement.
Feb 27, 2023, 1:29:47 PM

Feedback

This page displays messages signed-in users have sent and received and allows users to reply to messages from other site users.

The messages are organised by the sender, which is selectable on the left-hand side.

Messages which have been sent are displayed aligned to the right and received messages are aligned to the left. Both are sorted chronologically by the sent date, which is displayed under the message.

Users will receive an alert if they receive a message while navigating the front end, which will take them directly to the messages page to view.

Users can send a message in any conversation by entering the message in the input field and pushing the send button to the right.

If you believe this is in error, please contact the owner again to request access reinstatement.
Feb 27, 2023, 1:29:47 PM

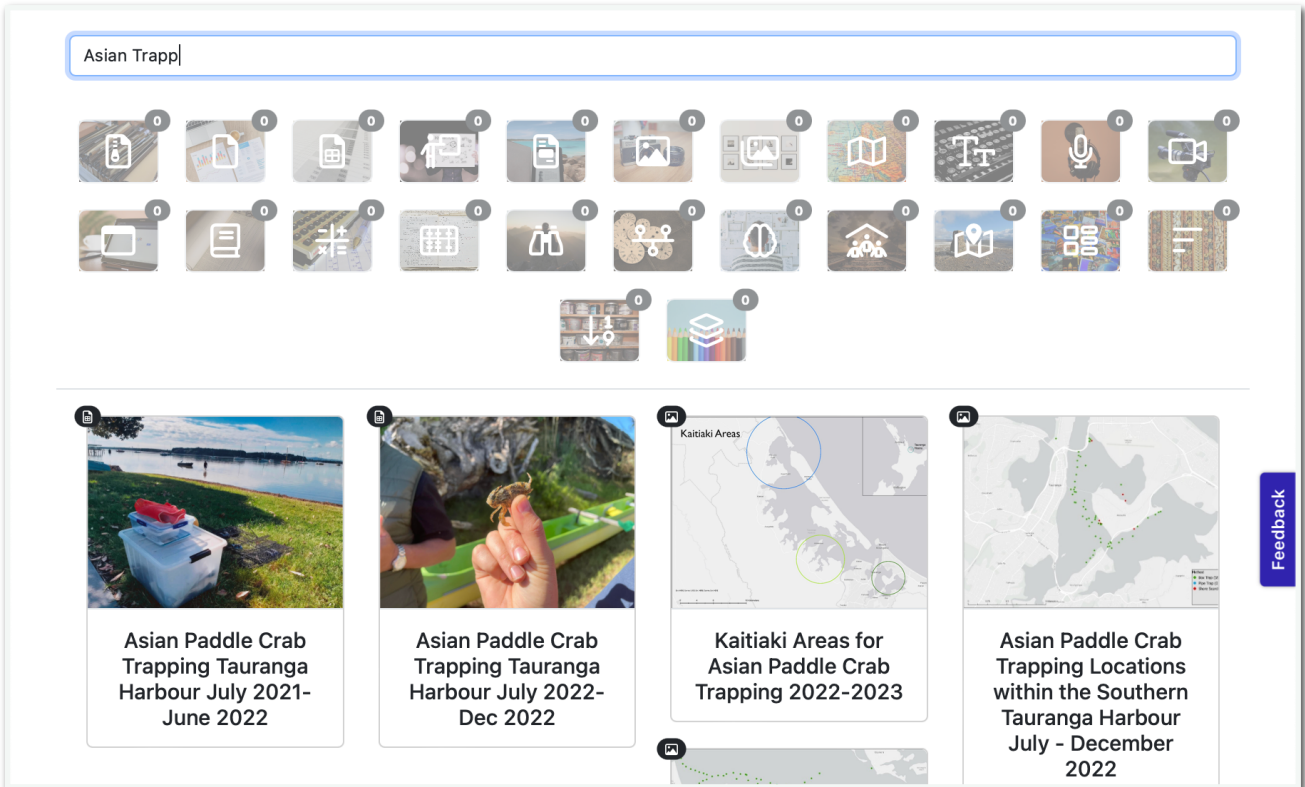
Here is a reply

»

Searching and filtering content

Users viewing uploaded content can either search for keywords in the title or description by typing into the search input field, or they can filter all shown content using the type selection buttons, which are present wherever multiple results are displayed.

To search the displayed results for keywords, start typing into the search input field. Keywords can be entered in any order, in any case, and they do not have to be complete for the filtering to begin.



To show all results, clear the search input field completely.

Users can also search for content of a specific type by selecting that type in the type filtering grid (shown above the search results in the example above). The icons within the type buttons indicate the content type, but users can hover over the icon to read the type name for further clarity.

Clicking a type button will cause it to become highlighted and filter the results only to show results of that type. Selecting more than one type will cause the filter to include all results of all the currently selected types. To reset the results filtering, deselect all selected types.

The number of results available for each type is shown in the badge attached to the top-right of the buttons. When no content of a type is available, it will be greyed out and become unselectable.

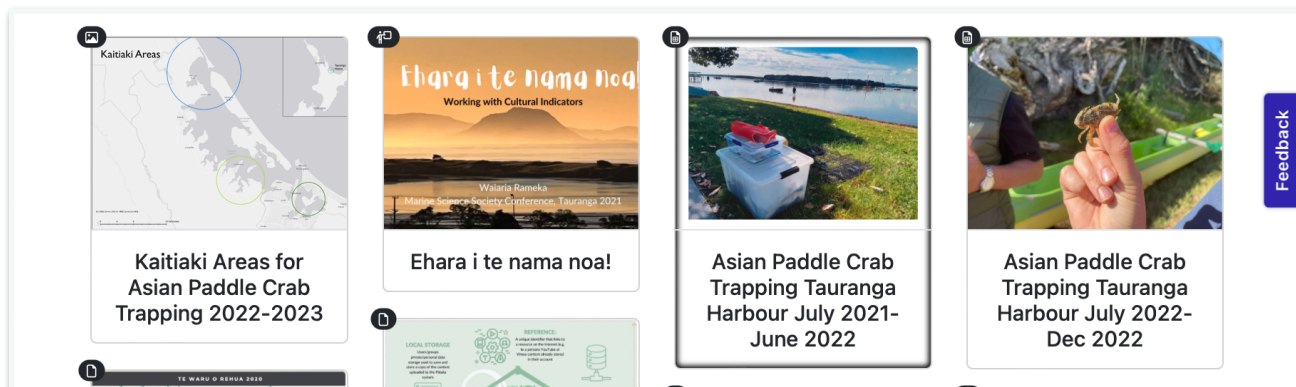
Keyword searching will also update the number of available results for each type.

Tip

For performance reasons, only the first 10 results of each type of content is loaded on this page. To load more ether scroll down, or click the link at the bottom of the *loaded* content.

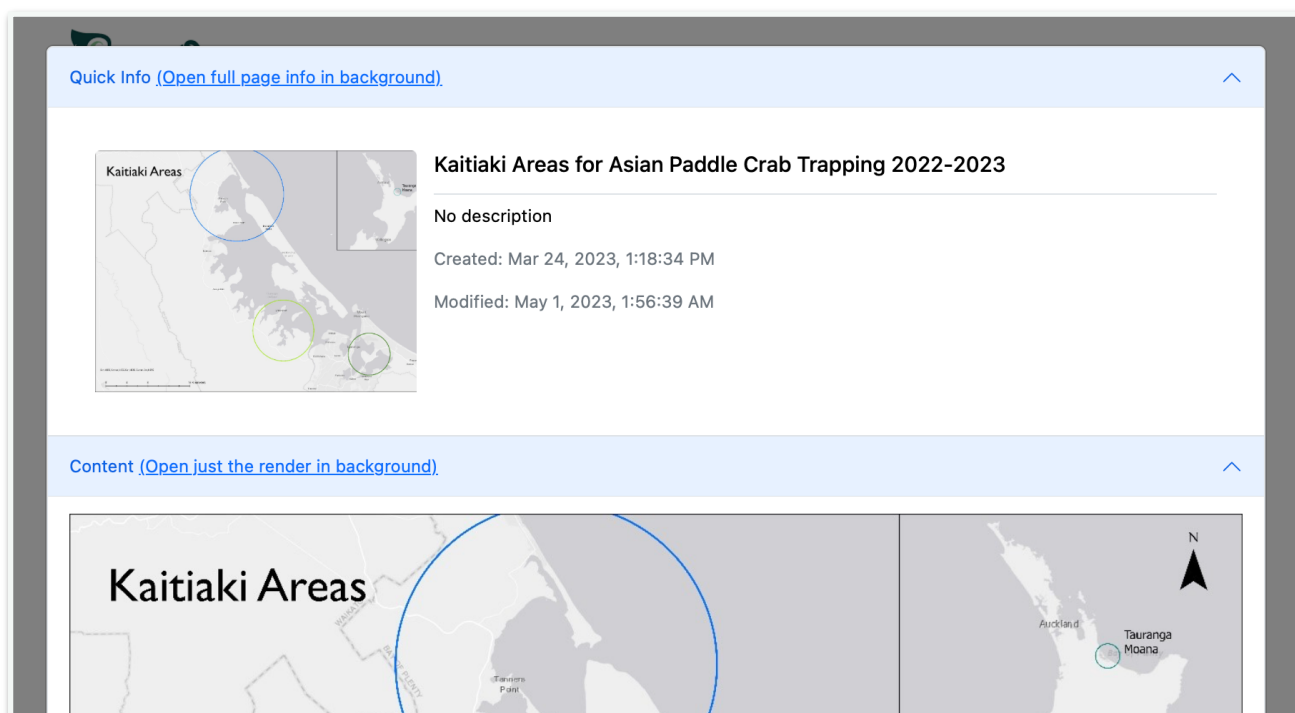
Viewing and sharing content

Results are shown in the results section, usually the lowest point of the currently loaded page, as previews of the content with a thumbnail image and the title displayed.



Clicking on any preview will cause a popup to be opened with a full-size render of the content and show other associated content (as previews).

How content is shown will depend on its type, but generally, a full-sized visual rendering of the content will be shown in the Content section of the popup. If a full-sized rendering is not possible or it fails due to an error, a Download link will be shown instead for offline viewing.



The Quick Info and Content section headers contain links that can be right-clicked and copied to share the content. The first will link to a page showing all the information in the popup. The second will link to a page displaying just the rendered content without any other information preset in the popup. Below the Content section, information about the content's creator (or uploader) is displayed.

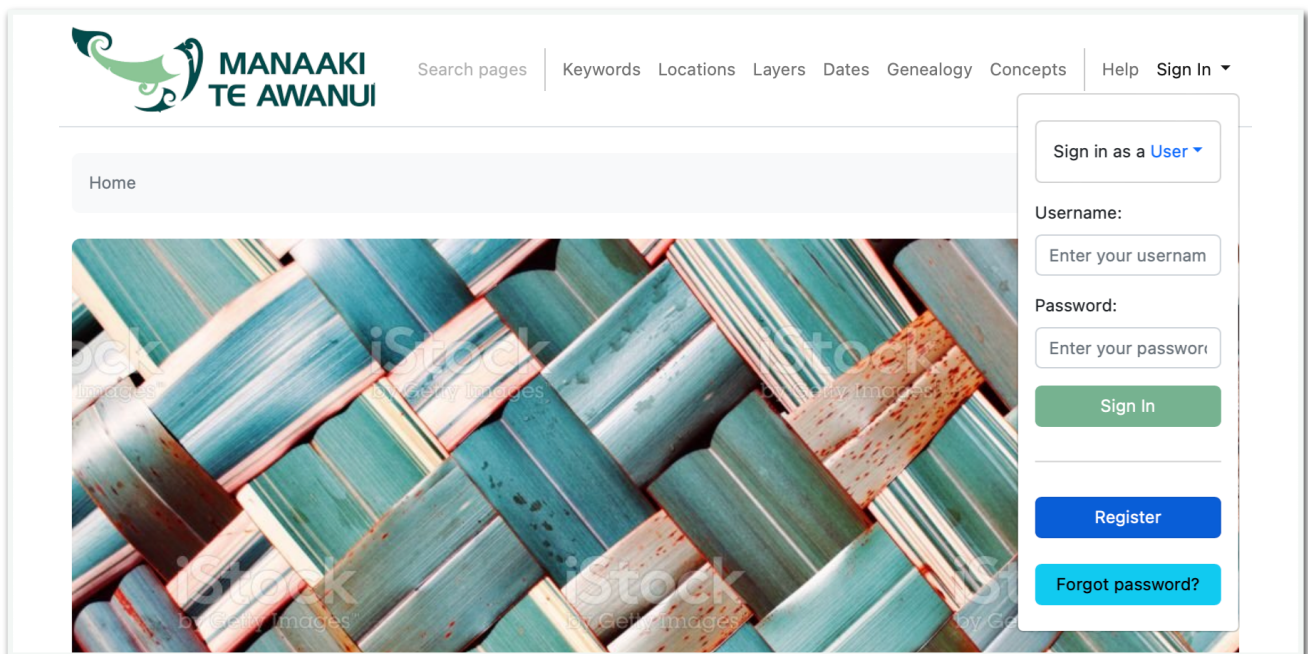
Finally, the Associated and Associations sections display linked or related content grouped into themes by tabs. Previews of this related content can be clicked to open a separate popup.

Popups can be closed by clicking anywhere outside of the popup or refreshing the page.

Creating an account and signing in

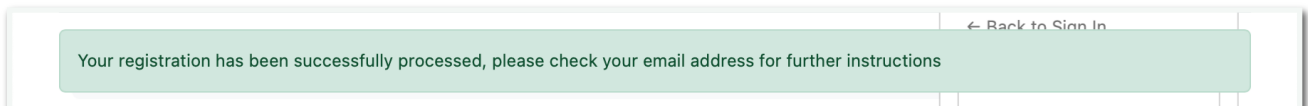
Creating an account and signing in to the front end will give users access to the following, in addition to the functionality available to public users;

- The ability to “favourite” content
- The ability to request access to private content
- The ability to message content creators
- The ability to get real-time notifications of site messages
- The ability to edit their details and update their password
- The ability to view groups and organisations they are apart of
- The ability to see content that has been shared with you

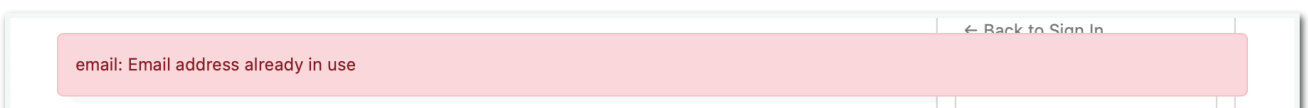


New users can register an account by clicking on the sign-in dropdown, then instead of entering their account details, clicking the Register button.

In most cases, new users should leave the “Register as” section set to “User” and simply enter a unique username, email address and strong password before clicking the Register button.



If there are no errors, a success alert will be shown, and an email containing a confirmation link will be sent shortly afterwards.

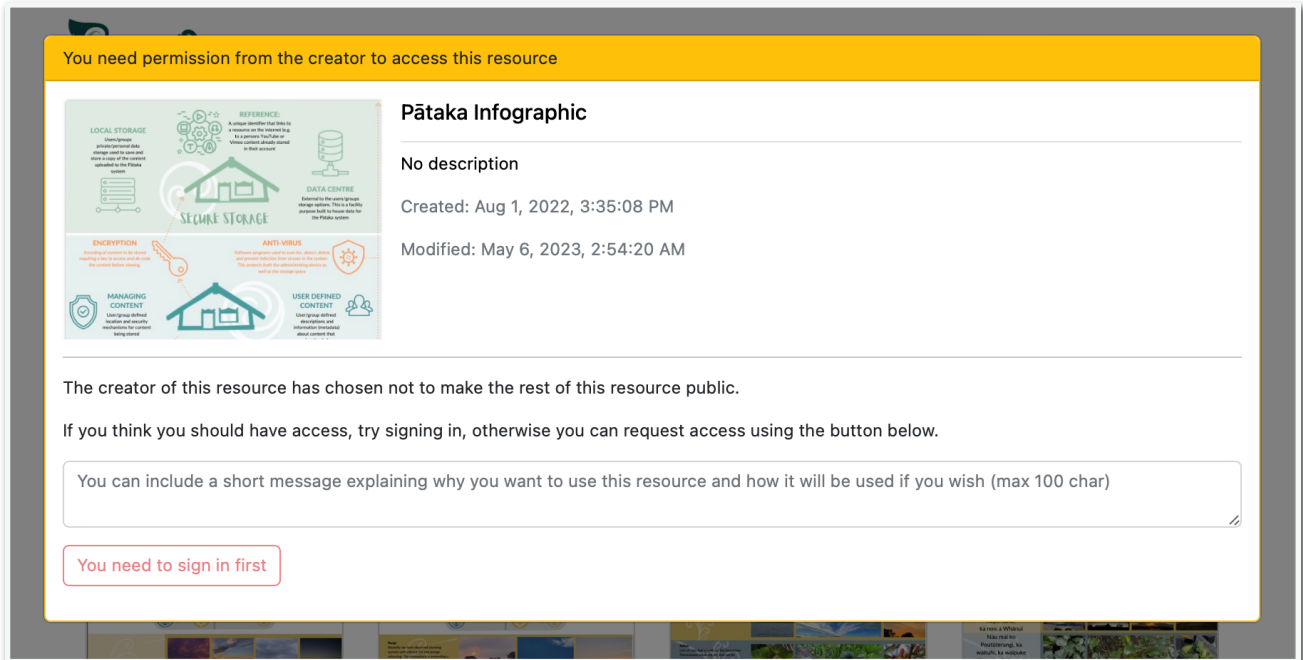


The most common cause of errors when registering is using an email address or username which is already in use. Both the username and email address of all registered accounts must be unique.

Requesting access to private content

Content owners can make their content public or private and only available to users they have shared it with.

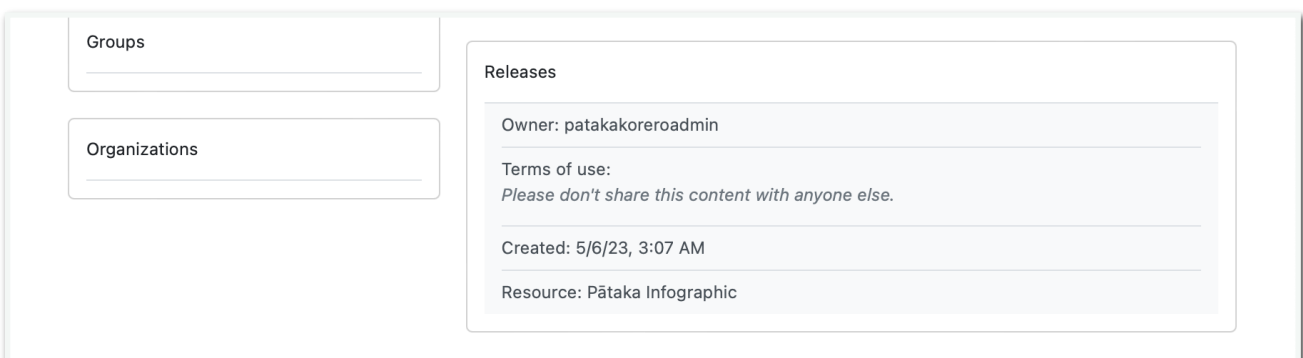
Users who are either not signed in or do not yet have access will be shown the following when they try to view private content.



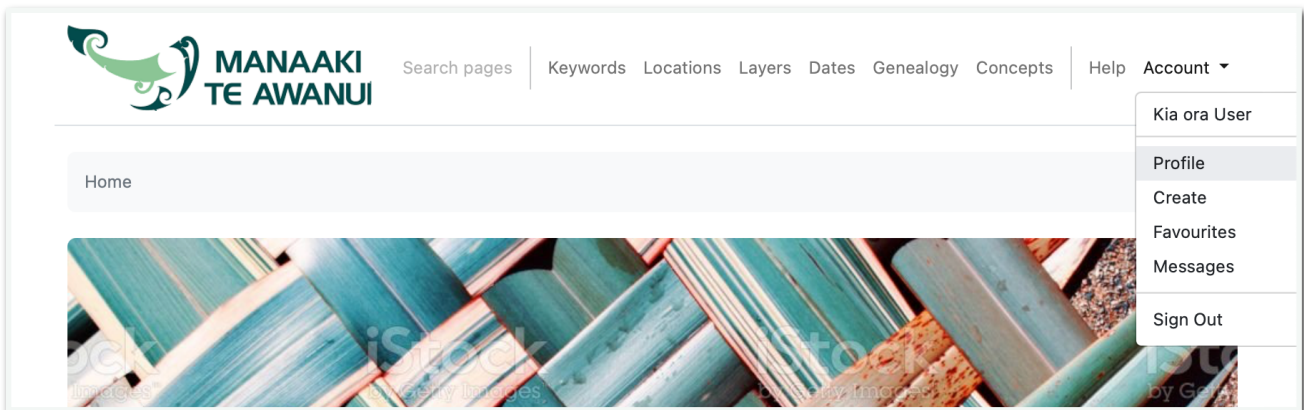
Signed-in users can submit an access request to the content owner with an optional message.

Once an access request has been submitted, the content owner can create a release or respond to the requesting user via the site messages.

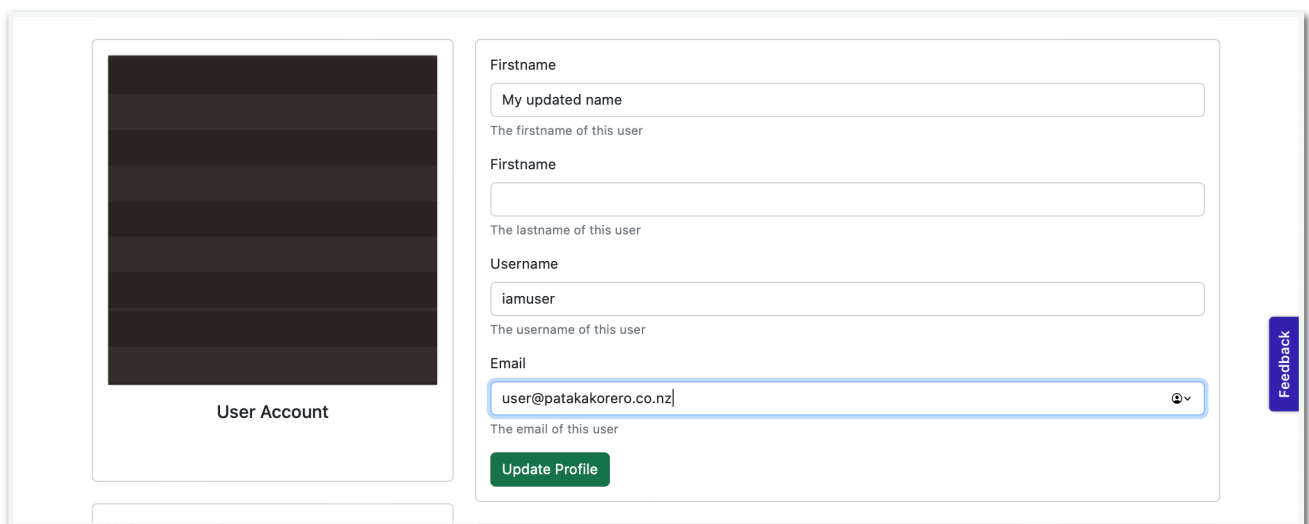
If the content owner grants an access request, the requesting user will receive an email and site message confirming their new access, and it will also be shown under Releases on the profile page.



Updating your account details



Signed-in users will have access to a profile page under the account menu dropdown, which shows an overview of their account and the users and groups they are included in.



Users can edit any of the profile info fields on the right-hand side but must press the “Update Profile” button to save any changes. If there are any errors with updating your information, an error popup will be shown after clicking the Update Profile button.

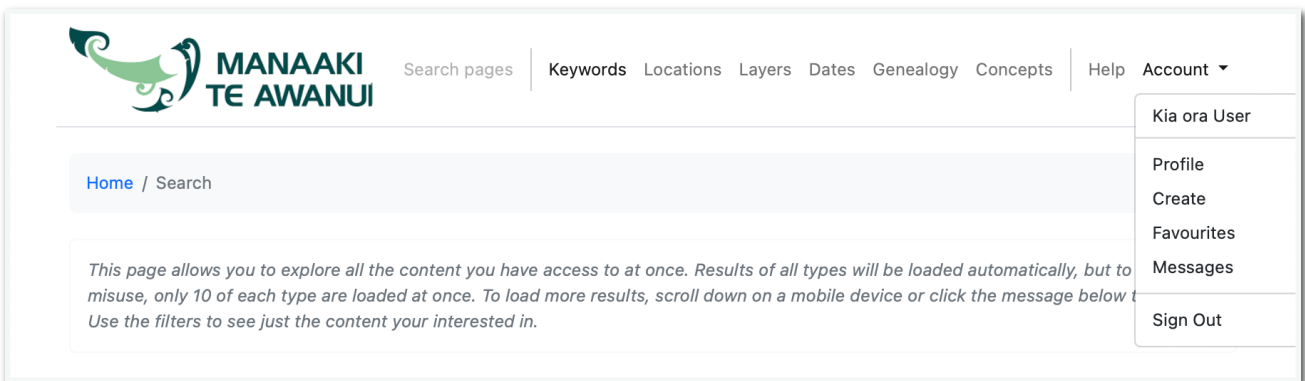
Sending and receiving messages

Sending a message to another creator is triggered by requesting access to content. This will send a message, and the creator of the content will receive the message and will be able to respond, hopefully by setting up a release for the requesting users.

Once a conversation has been started, either user is free to continue the conversation.

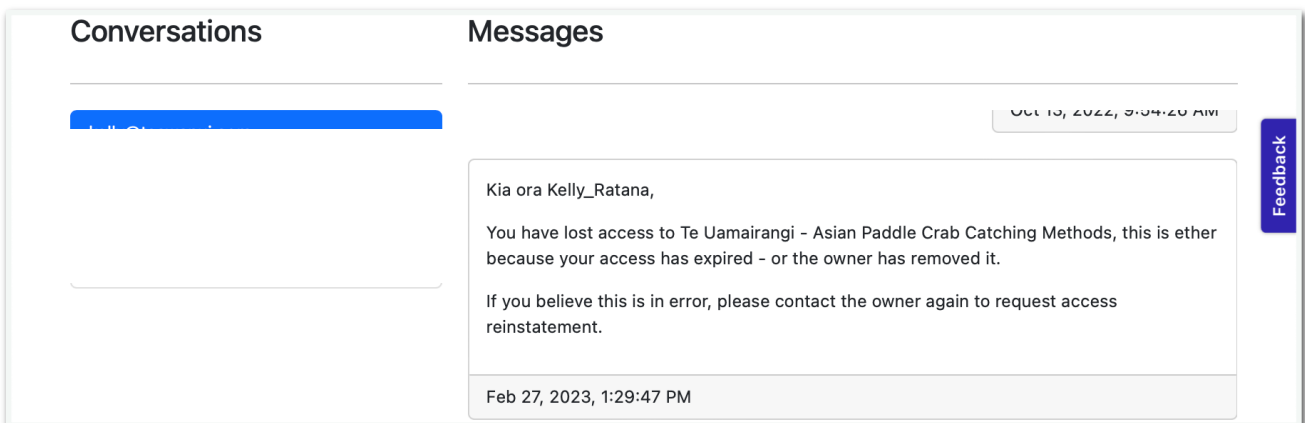
Messages are sent both within the Pātaka kōrero and as emails, provided the recipient user has agreed to receive site contacts (one of the options when registering or updating a user's profile).

Site messages can always be viewed by signing in to the front end and clicking the “Messages” page link within the “Account” menu item.

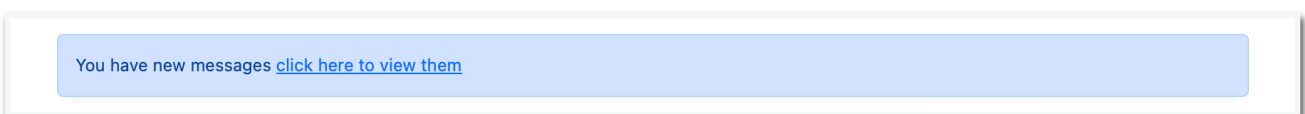


This will open the Messages page, which displays sent and received messages grouped into Conversations based on the recipient.

Selecting a user's email on the left-hand side will update the messages pane on the right to show the conversation with that user.



Typing a message into the message input area and pressing the arrow send button will cause a new message to be sent to the current recipient.



If the user is not currently on the messages page but is signed in, they will receive a notification when a new message is delivered with a quick link to be taken to the messages page.