

BIREME / PAHO / WHO

Latin American and Caribbean Center on Health Sciences Information

Using the VHL Plugin for WordPress

Version 1.0

São Paulo April 2014

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Using the VHL Plugin for WordPress

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Card catalog

BIREME / PAHO / WHO (Brazil)

Using the VHL Plugin for WordPress. / BIREME / PAHO / WHO. São Paulo : BIREME / PAHO / WHO, April 2014.

93 p.

1. User manual. 2. Information access. 3. Information systems. 4. Information management. 5. Public health. 6. Public Health services. I. BIREME II. Title

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BIREME / PAHO / WHO

Latin American and Caribbean Center on Health Sciences Information

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This document was produced with the Documents Conformation Methodology (NorDoc) developed by BIREME.

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Purpose of this manual

This document aims to present the operational and administration model of a web portal using the tools available in WordPress using the VHL Site plugin.

It is not intended to present all aspects of the operational environment of Wordpress, but only those required by the operation and running of VHL Site plugin and other plugins homologated by VHL Model. For further information on WordPress and its functionalities, please access the WordPress manual available at http://codex.wordpress.org/pt-br:Principal_inicial

Foreword

About BIREME

Year after year, BIREME has been following its mission of being a center dedicated to scientific and technical health information for the region of Latin America and the Caribbean. Founded in Brazil in 1967, under the name of Regional Medicine Library (which the acronym BIREME comes from), it has always met the growing demand for up-to-date scientific literature from the Brazilian health systems and the communities of healthcare researchers, professionals and students. Then, in 1982, its name changed to Latin-American and Caribbean Center on Health Sciences Information so as to better express its dedication to the strengthening and expansion of the flow of scientific and technical health information across the region, but kept the acronym.

Networking, based on decentralization, on the development of local capacities, on sharing information resources, on developing cooperative products and services, on designing common methodologies, has always been the foundation of BIREME's technical cooperation work. It has been like this that the center established itself as an international model that fosters professional education with managerial and technical information with the adoption of information and communication paradigms that best meet local needs.

The main foundations that gave origin and which support the existence of BIREME are following:

- ✓ access to scientific and technical health information is essential for the development of health;
- ✓ the need to develop the capacity of Latin American and Caribbean countries to operate their sources of scientific-technical health information in a cooperative and efficient manner;
- ✓ the need to foster the use and to respond to the demands for scientific-technical health information from governments, health systems, educational and research institutions.

BIREME, as a specialized center of the Pan-American Health Organization (PAHO)/ World Health Organization (WHO), coordinates and conducts technical cooperation activities on the management of scientific information and knowledge with the aim of strengthening and expanding the flow of scientific health information in Brazil and in other Latin American and Caribbean countries as a key condition for the development of health, including its planning, management, promotion, research, education, and care.

The agreement that supports BIREME is renewed every five years by the members of the National Advisory Committee of the institution (PAHO, Brazilian Ministry of Health, Brazilian Ministry of Education and Culture, Secretary of Health of the State of São Paulo, and Federal University of São Paulo – Unifesp). The latter provides the physical infrastructure necessary for the establishment of the institution.

In 2004 the institution took on the responsibility of becoming a knowledge-based institution.

The Virtual Health Library (VHL)

With the rise and consolidation of the internet as the prevailing means of access to information and communication, BIREME's technical cooperation model evolved, as of 1998, to build and develop the Virtual Health Library (VHL) as a common space for the convergence of the cooperative work of producers, intermediaries, and users of information. The VHL promotes the development of a network of sources of scientific and technical information with universal access on the internet. For the first time there has been a real possibility of equal access to health information.

To BIREME, the Virtual Health Library is a model for the management of information and knowledge, which includes the cooperation and convergence between institutions, systems, networks, and initiatives of producers, intermediaries, and users in the operation of networks of local, national, regional and international information sources favoring open and universal access.

Today, every country in Latin America and the Caribbean (Region) participates either directly or indirectly in the cooperative products and services offered by the VHL, which includes over 1,000 institutions in more than 30 countries.

The VHL is simulated in a virtual space of the internet formed by a collection or network of health information sources in the Region. Users of different levels and locations can interact and navigate in the space of one or many information sources, regardless of where they are. Information sources are generated, updated, stored and operated on the internet by producers, integrators, and intermediaries, in a decentralized manner, following common methodologies for their integration in the VHL.

The VHL organizes information in a structure that integrates and interconnects reference databases, specialist directories, events and institutions, a catalogue of the information resources available on the internet, collections of full texts with a highlight for the SciELO (*Scientific Electronic Library Online*) collection of scientific journals, selective information dissemination services, information sources to support education and decision-making, news, discussion lists, and support to virtual communities. The space of the VHL is, therefore, a dynamic and decentralized network of information sources based on which it is possible to retrieve and extract information and knowledge to support health decision-making processes.

The Virtual Health Library can be visualized as a distributed base of scientific and technical health knowledge that is saved, organized and stored in electronic format in the countries of the Region, universally accessible on the internet and compatible with international databases.

Introduction

Wordpress is a content management system, originally create to provide an organized space for blogs on the Internet, and that has been extended through plugins, visual themes and widgets to accommodate any other type of site that can be published in the web.

Basically written in PHP and using MySQL database, Wordpress has a dynamic and intuitive interface by using integrated tools to facilitate the creation, customization, storage, management, publication, propagation and search personal and corporate web sites.

Wordpress version 3.7 - the subject of this document – has the following characteristics:

- Generates [XML](#), [XHTML](#), and [CSS](#) according to [W3C](#) standards;
- Permanent links management user-friendly to search engines;
- Extensive support to plugins;
- Category-based hierarchy;
- [TrackBack](#) and Pingback;
- Typographic filters for correct text formatting & styling;
- Stactic pages;
- Multiple users/authors;
- Tag support.

User profile

WordPress has four active profiles: *Administrator*, *Editor*, *Author* and *Contributor*. There is another profile called *Subscriber*. For the operation of a typical VHL portal only the administrator's profile is being presented once for all other profiles only operational restrictions apply to.

Administrator's profile

To gain access to the Wordpress administration area type in the application's URL in the web navigator, e.g.: <http://meu-dominio/wp-login/>



Illustration 1. Wordpress administration login panel

NOTE: User and password data are send by e-mail whenever there is an e-mail service up and running. During installation process both network administrator and/or webmaster can set standard user and password.

Administrator profile has the following options: Dashboard, Posts, Media, VHL Collection, Links, Pages, Comments, Appearance, Plugins, Users, Tools and Settings.

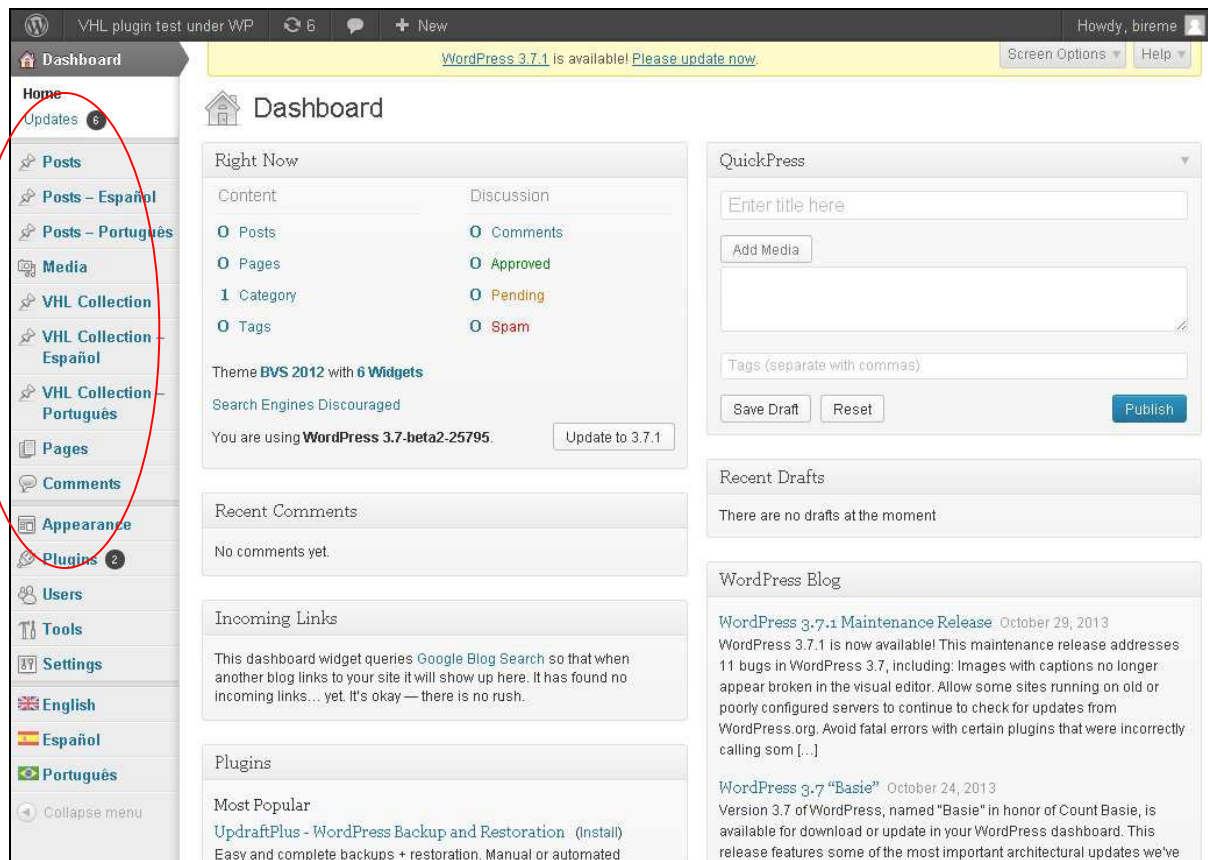


Illustration 2. Control options in Wordpress

Dashboard

In this panel there can be viewed and accessed summaries of the portals' activities such as: **Post**, **Page**, **Categories** and **Tags**.

- **Post:** texts that may be news, calls, comments or highlights. Usually has a title and its text..
- **Page:** static pages with no categories. E.g.: institutions' address, contact info etc.
- **Categories:** themes defined in Wordpress to classify information into specific chunks. E.g.: a post related to prevention would use a 'prevention' category.
- **Tag:** keywords to be used on a post as a way to classify information briefly and standardized.

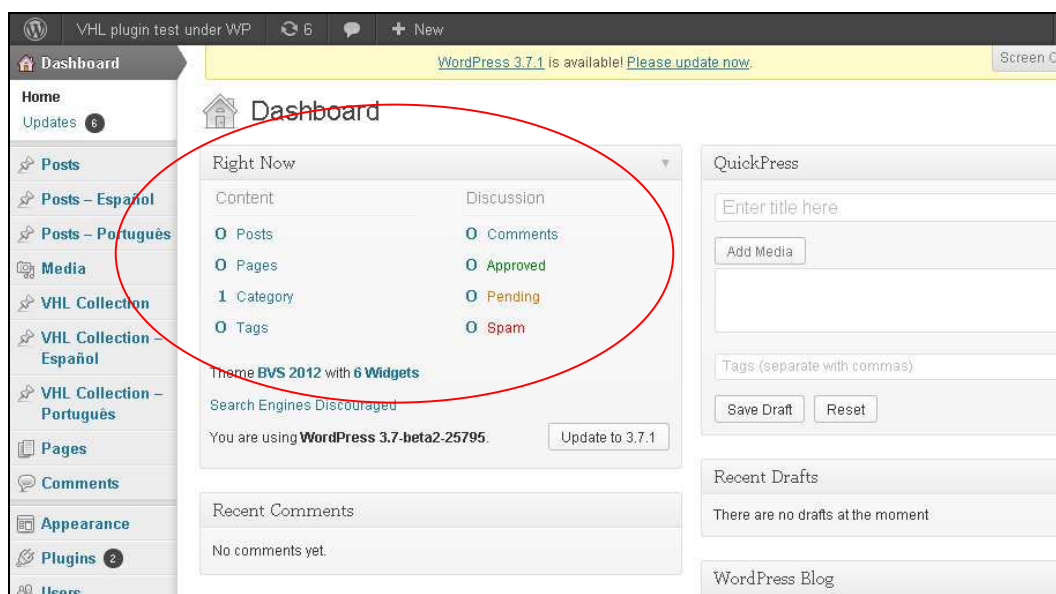


Illustration 3. Dashboard panel

My sites

In this panel the user can view and access the contents of the main page of the VHL portal - and subportals -being created.

Note: access to this option depends on the way Wordpress was installed. Access the Wordpress installation information through the URL: <http://br.wordpress.org/>

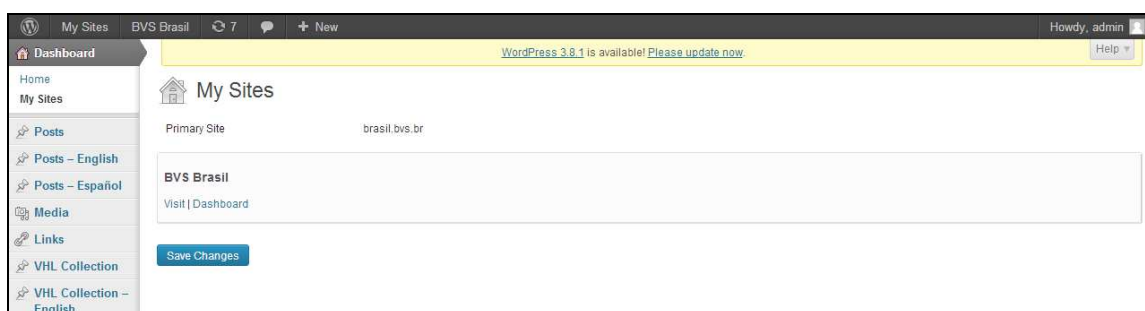


Illustration 4. My Sites

Below each site name there are two options: **Visit** and **Dashboard**.

By clicking on **Visit** user views the portal the way it is being published. E.g.: Cancer Prevention & Control Portal:



Illustration 5. Portal publication's layout

By clicking on **Dashboard**, the contents of the portal can be viewed, accessed and edited with the following options: *Posts, Pages, Categories* and *Tags*.

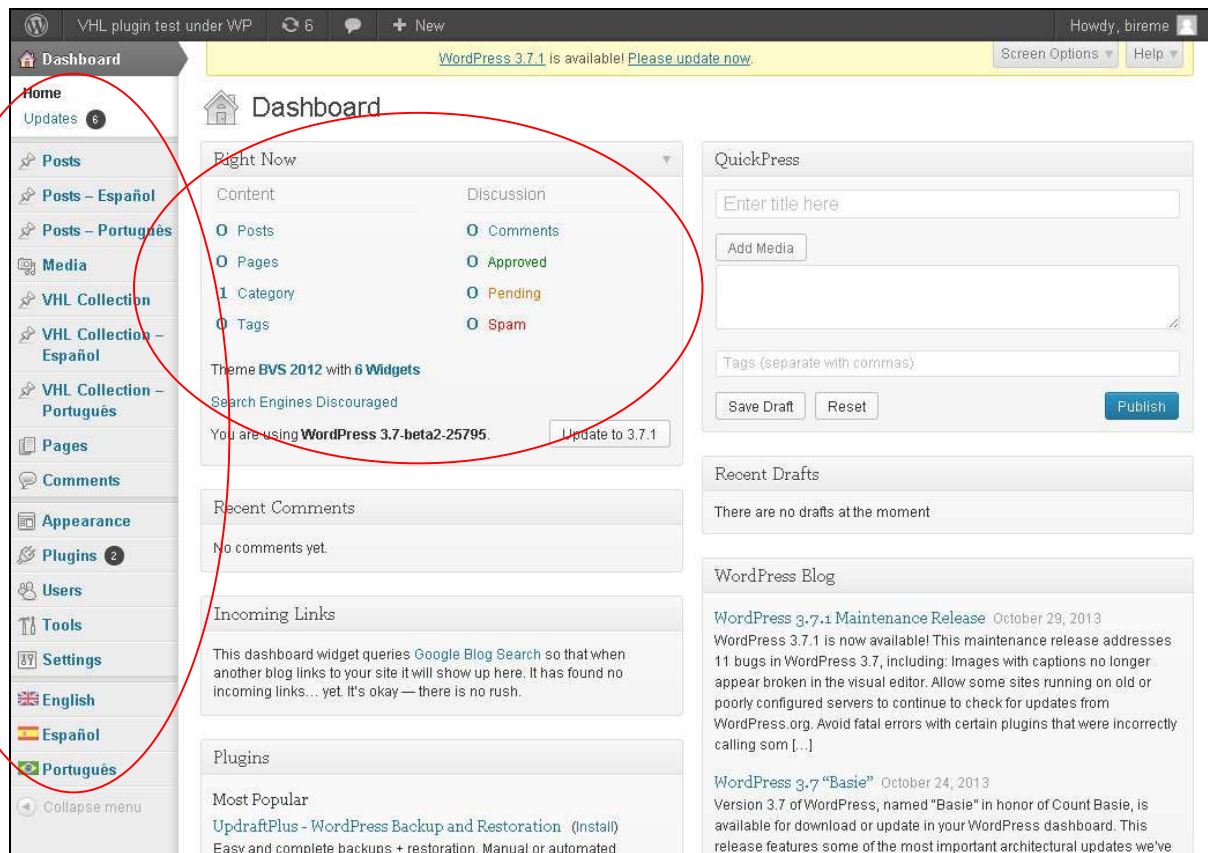


Illustration 6. Viewing some dashboard options

Post

Posts are texts being either news, calls, comments or highlights. This kind of data is usually made of a title and a text content, and may be either dynamic or categorized.

By clicking on *Post* there are the following possibilities: **All posts**, **Add New**, **Categories** and **Tags**.

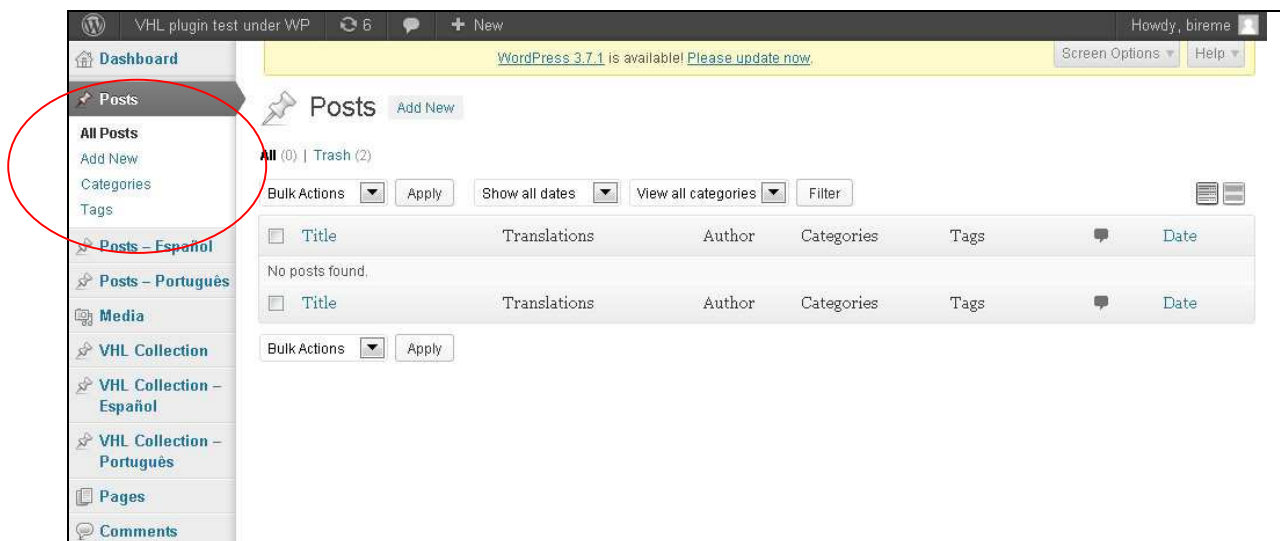


Illustration 7. Viewing posts' options

Add New

To create a new post just click on the **Add new** option:

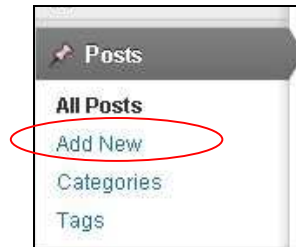


Illustration 8. Adding a Post

A new window opens for the inclusion of the *post*. In this form it can be added the Post title, the post text and its category, as well as, formatting the text by choosing font name, font size, bold, italics, change alignment, choose text color and so on.

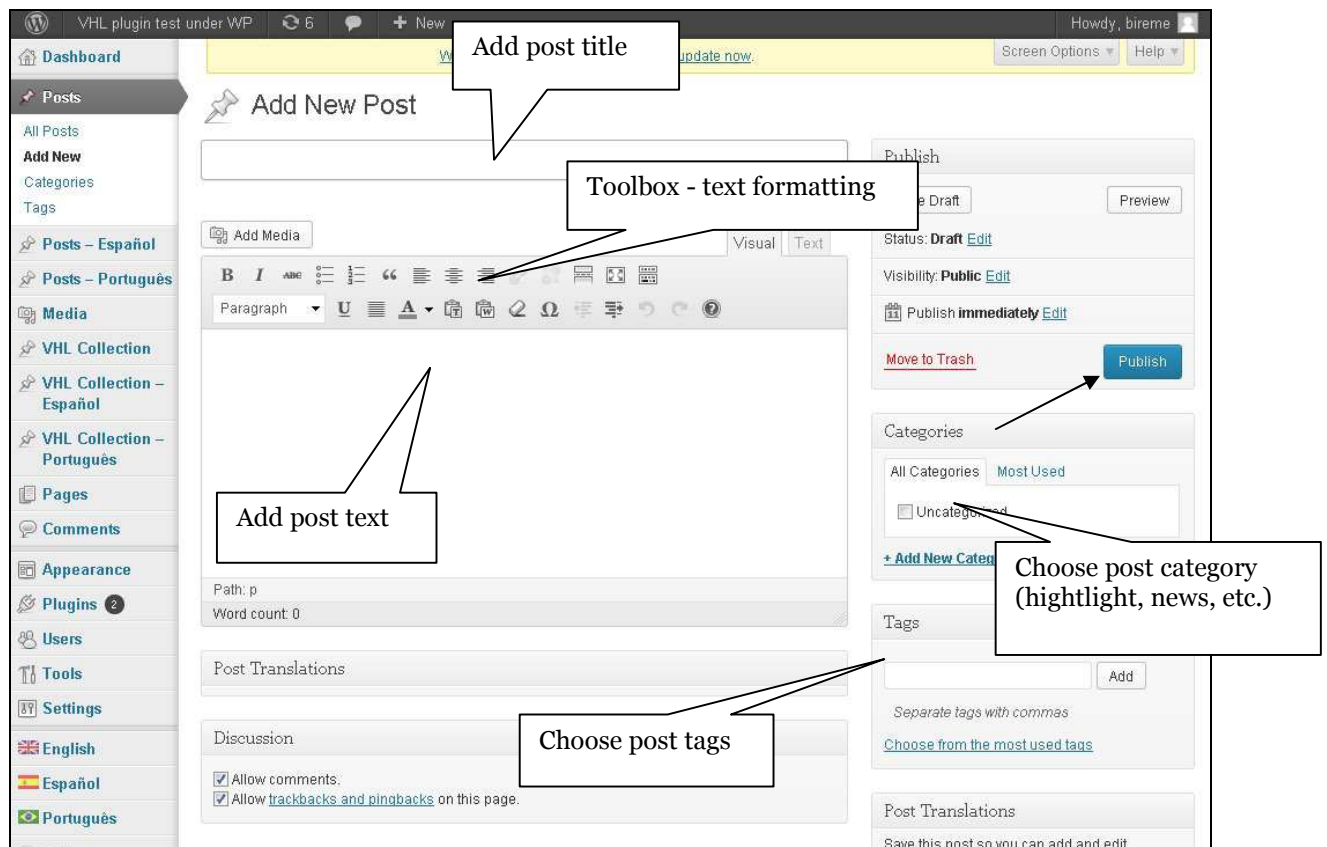


Illustration 9. Adding a Post

There is the possibility to publish the post immediately or choose a specific date for the publication.

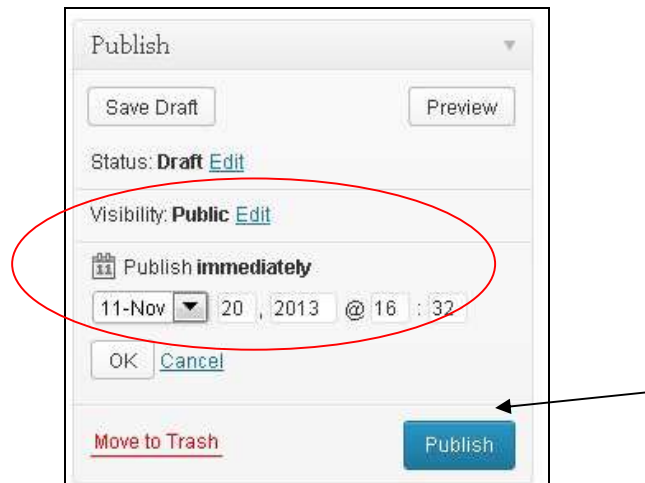
A screenshot of a 'Publish' dialog box. At the top, there are 'Save Draft' and 'Preview' buttons. Below them, the status is 'Draft' with an 'Edit' link. The visibility is set to 'Public' with an 'Edit' link. A red circle highlights the 'Publish immediately' section, which includes a calendar icon, a date/time picker set to '11-Nov 20, 2013 @ 16:32', and 'OK' and 'Cancel' buttons. At the bottom, there is a 'Move to Trash' link and a blue 'Publish' button, which is pointed to by an arrow from the right.

Illustration 10. Publishing a Post

A post can also be saved as **Draft** or **Pending review**. In both cases the contents can be reviewed and refined for future publication. To make it available for future review or refinement before publishing click the **Draft** button.

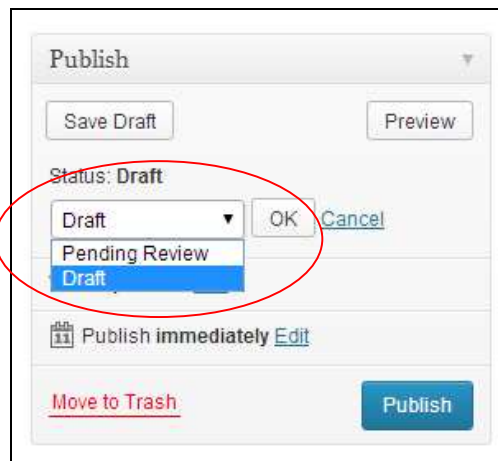
A screenshot of the 'Publish' dialog box. The status is currently 'Draft'. A red circle highlights a dropdown menu that is open, showing three options: 'Draft' (selected), 'Pending Review', and 'Draft'. The 'OK' and 'Cancel' buttons are to the right of the dropdown. Below the status section, there is a 'Publish immediately' section with an 'Edit' link. At the bottom, there is a 'Move to Trash' link and a blue 'Publish' button.

Illustration 11. Saving a Post as Draft or Pending review

To edit a post previously saved as **Draft** or **Pending review**, click **All Posts, Drafts**. Select the desired *post* from the list and click the **Edit** option so the editing form is opened to enable editing and/or publishing.



Illustration 12. Selecting a post for editing

Do all necessary changes and click **Update** (or **Publish**) button.

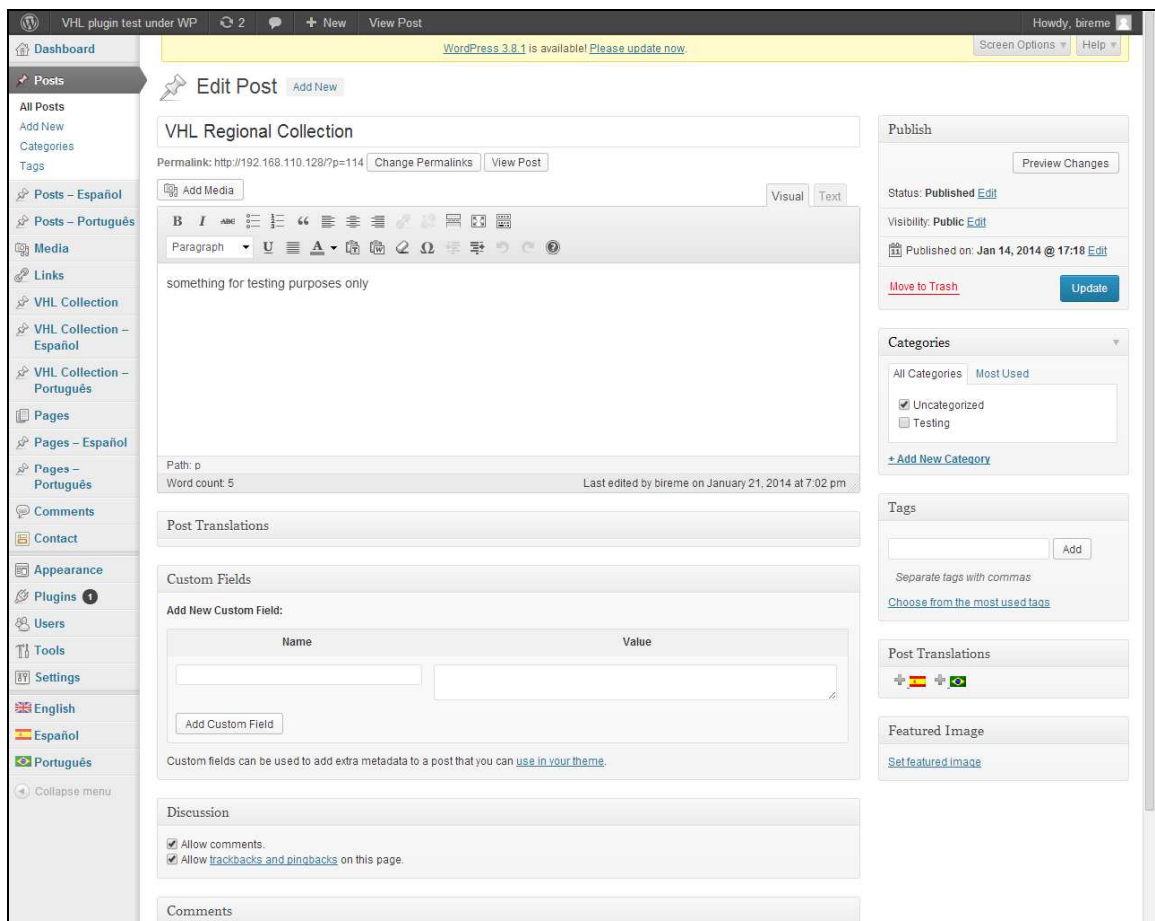


Illustration 13. Editing a Post

To view a *post* before it is being published click the **View** button.



Illustration 14. View the post before its publication

After the post is published the editing form has the **Update** button instead the **Publish** one and the **Save as draft** also vanishes.

All posts

All posts makes possible to view the amount of posts created, published and.

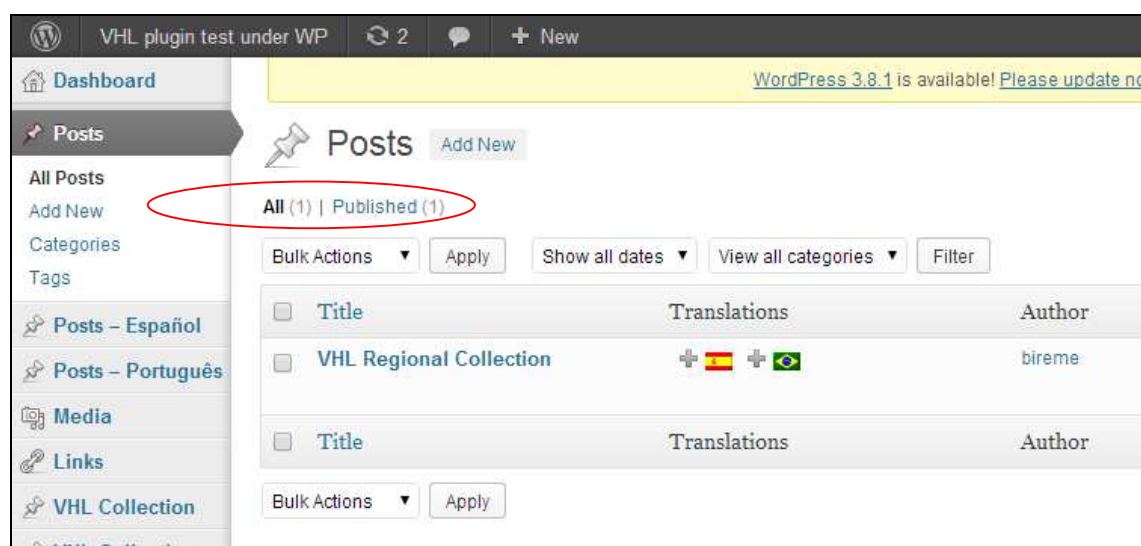


Illustration 15. Viewing the amount of Posts

Besides, it is possible to *view* each and every post as well as to choose *editing*, *deleting* and *quick editing* any of them.

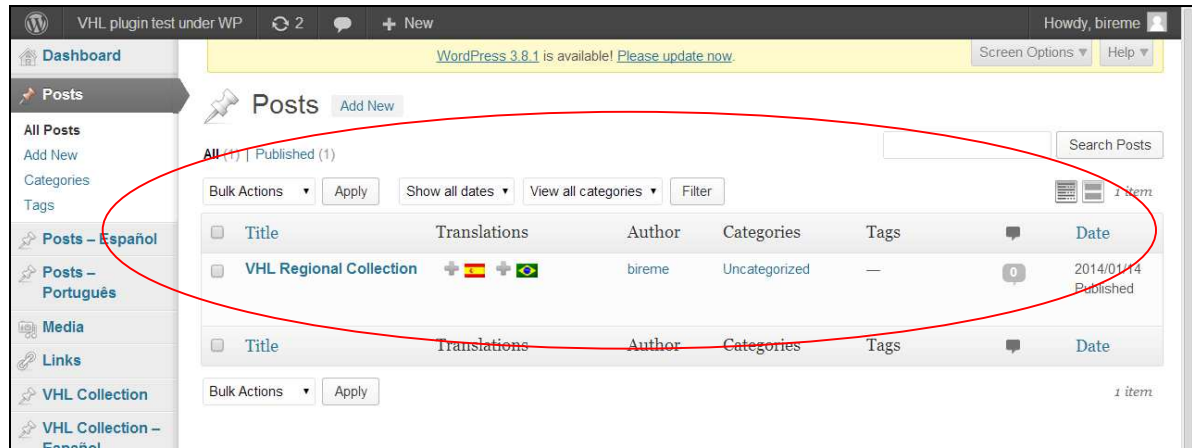


Illustration 16. Edit Posts

Bulk actions

Bulk actions allows editing and moving one or more posts to the trash. To achieve this first select the desired post(s) and then by clicking **Bulk actions**, choose **Edit** or **Move to trash**. The action is performed only when the **Apply** button is clicked.

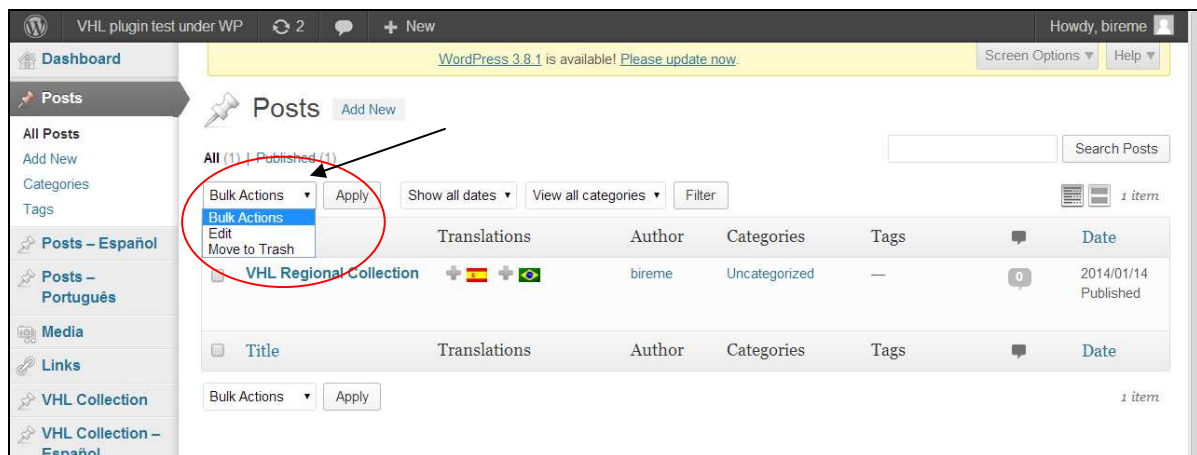


Illustration 17. Viewing Bulk Actions options

If the option **Edit** is chosen a new window opens with all common fields enabled for editing: **categories**, **tags**, **author**, **comments**, **status**, **pings** and **Sticky**.

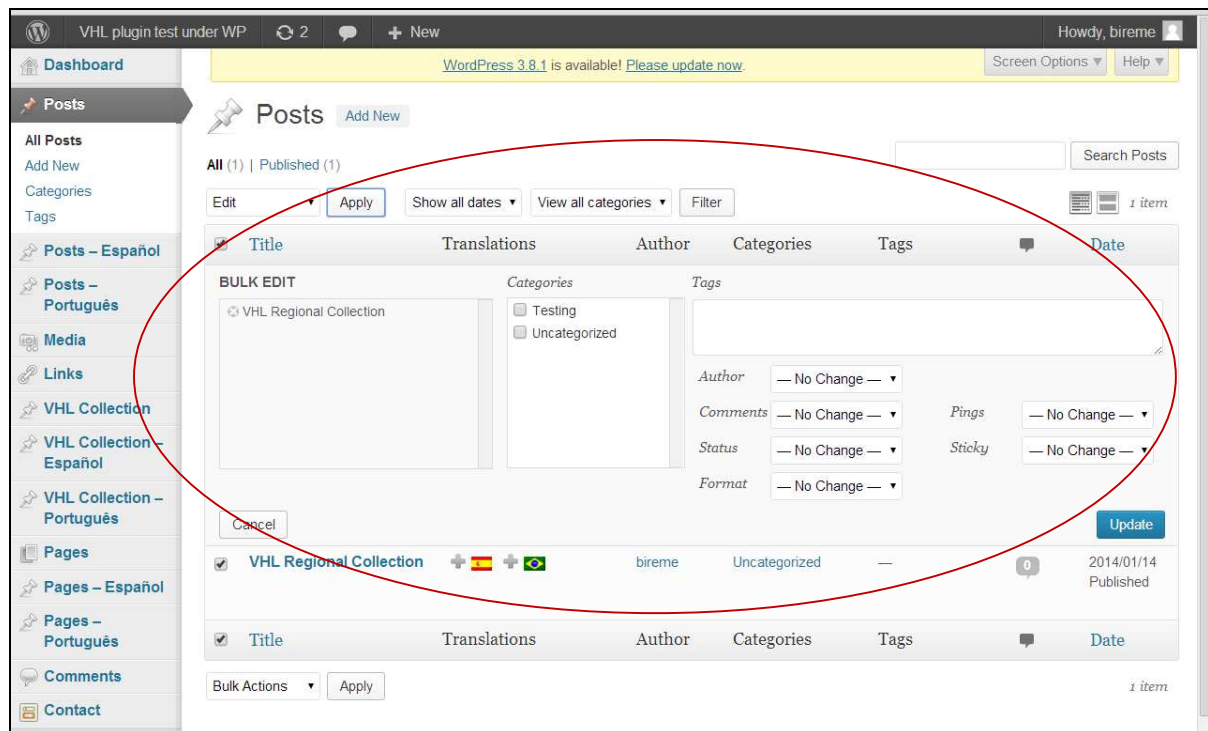


Illustration 18. Editing a group of Posts

If the option Move to trash is chosen all selected posts are immediately send to the trash, though maintaining the option to Restore and/or Delete permanently until the Trash is discarded.

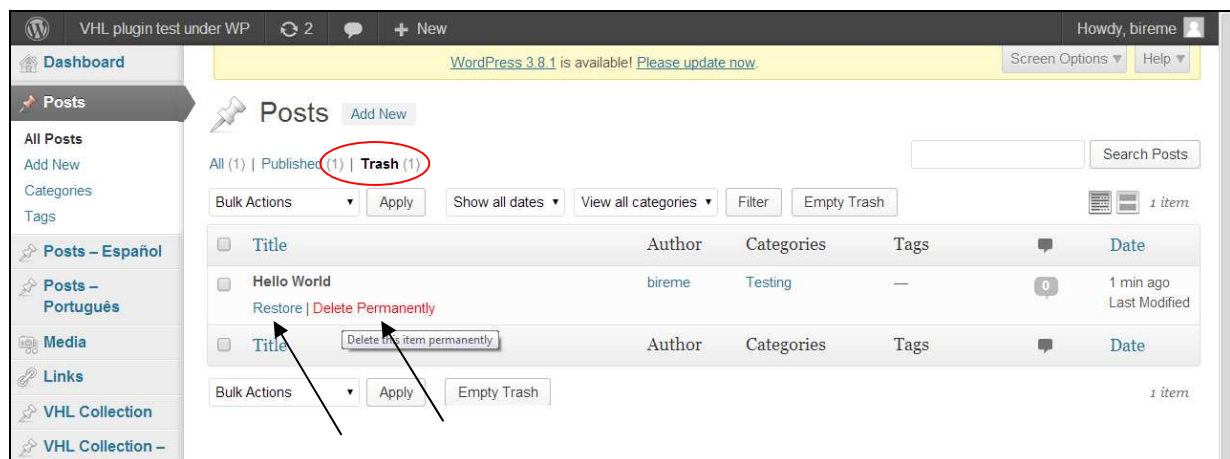


Illustration 19. Viewing Trash available options

Show all dates

Show all dates allows to search *posts* published on a specific month. To perform the search on a specific month previously select hit the option **Filter**.

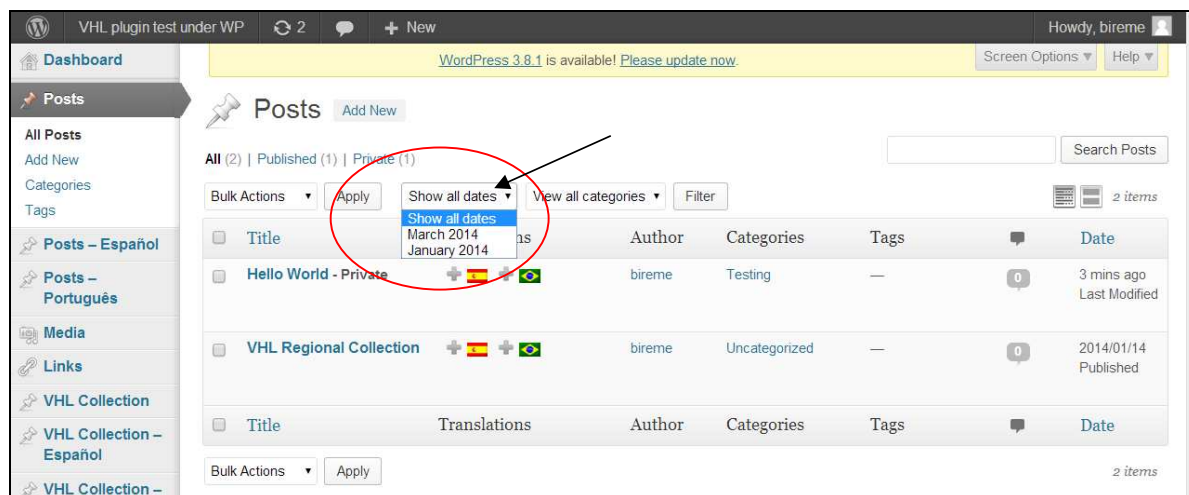


Illustration 20. Viewing all dates options

View all categories

View all categories option allows for searching for specific categories active in the portal. To achieve this, select a category and hit **Filter**.

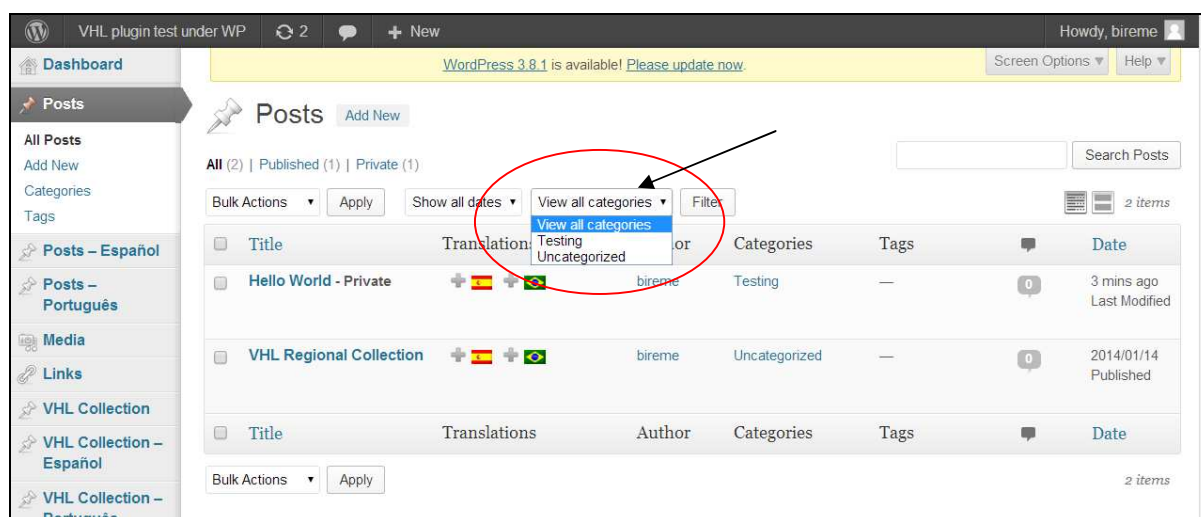


Illustration 21. View all categories

Edit

When selecting a post there are two possible editing options: **Edit** and **Quick edit**.

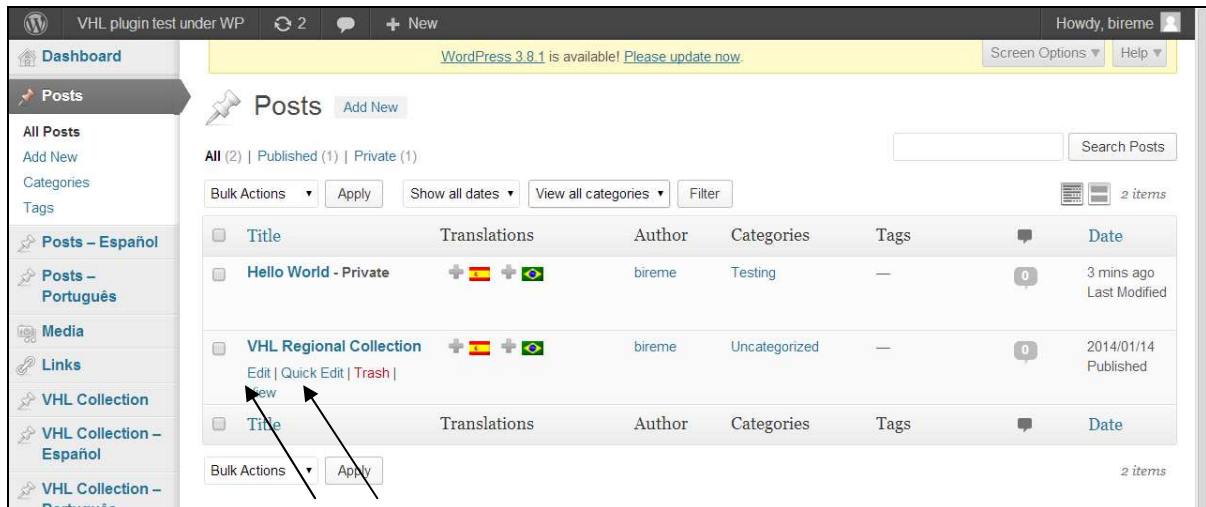


Illustration 22. Editing options

Edit allows for editing all fields related to that post such as: title, permalink, text, publishing status, visibility, categories, tags, featured image etc. To save changes just hit the **Update** button.

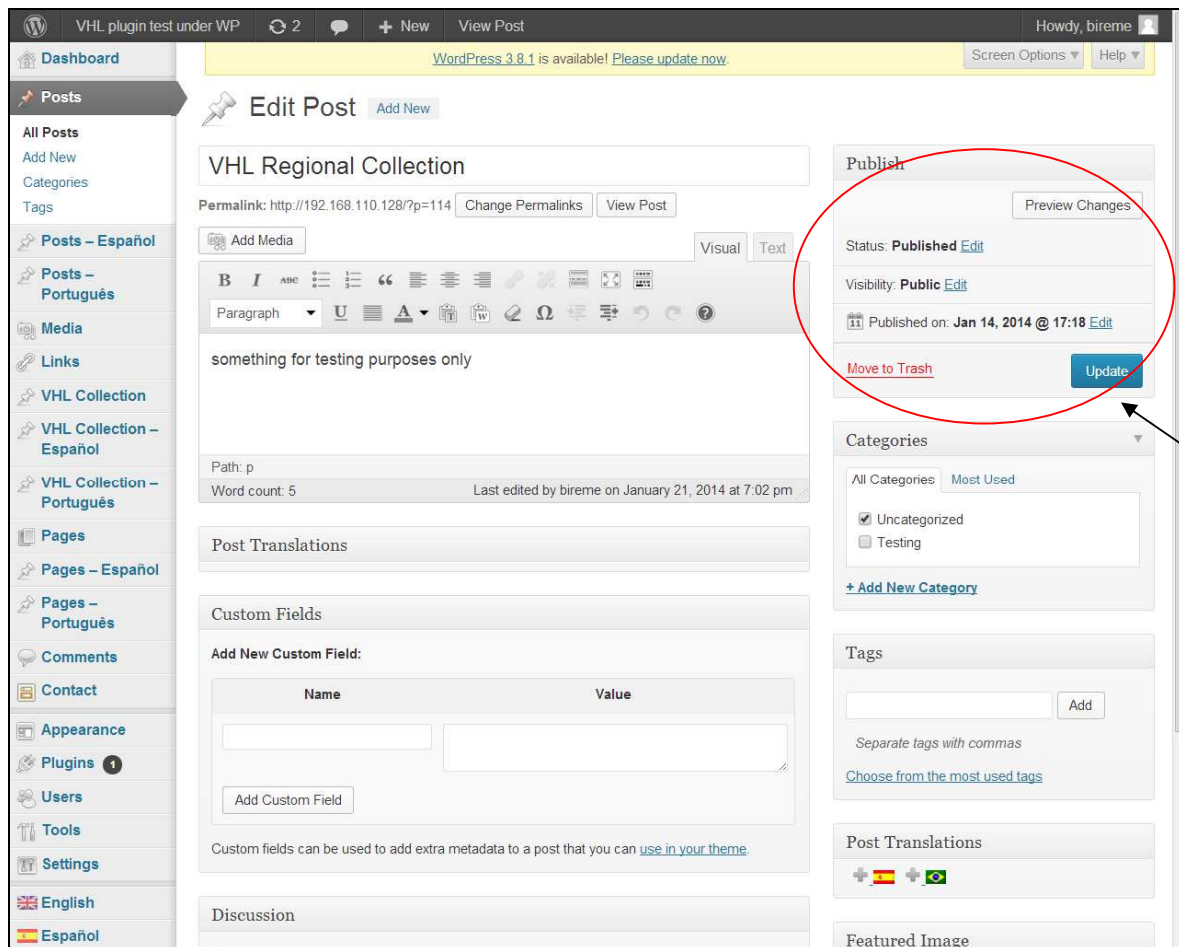


Illustration 23. Editing a post and saving changes

Using the **Quick edit** option only main fields are allowed to be edited: title, permalink (slug), date, categories, tags and publishing status.

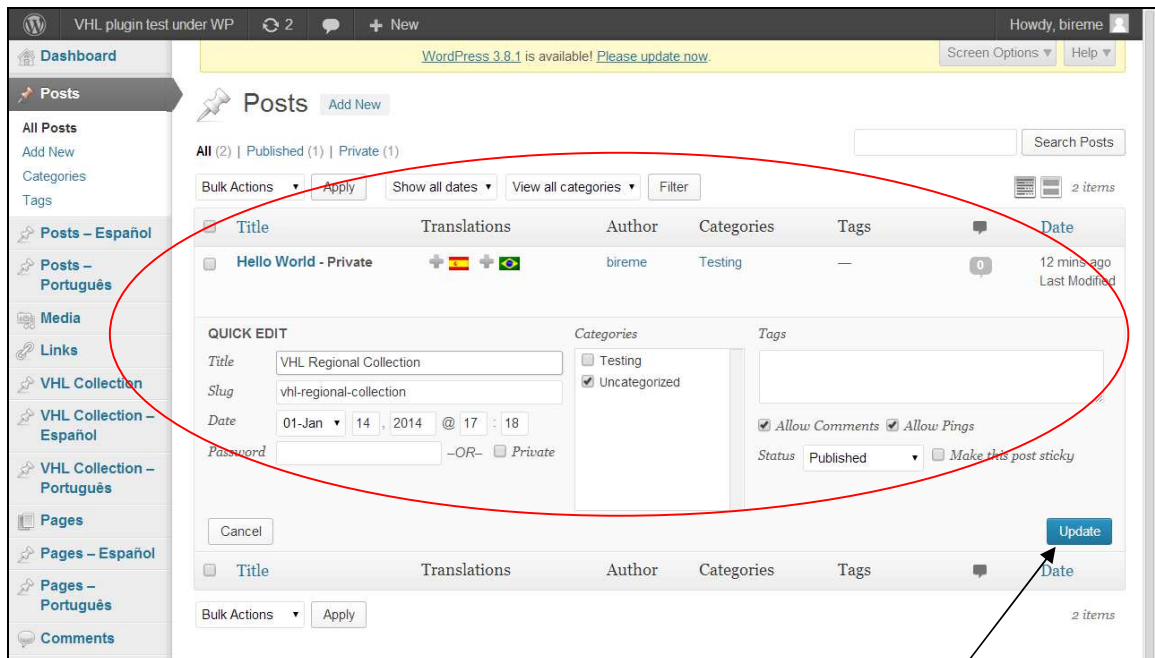


Illustration 24. Quick edit form

If the **Trash** option is chosen the post is automatically sent to the trash.

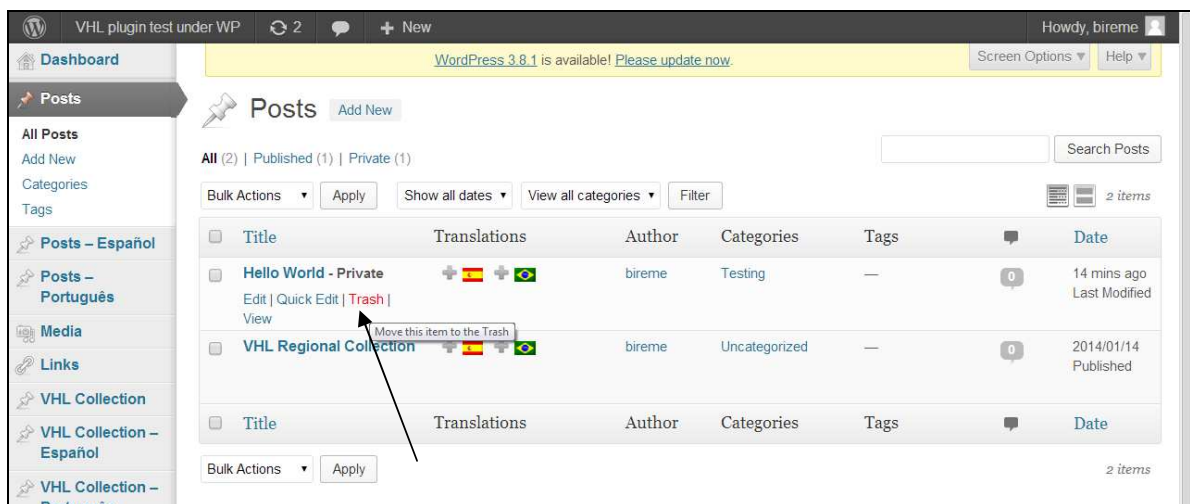


Illustration 25. Deleting a post

However, all *posts* moved to Trash can be either restored or permanently deleted until the Trash bin is discarded.

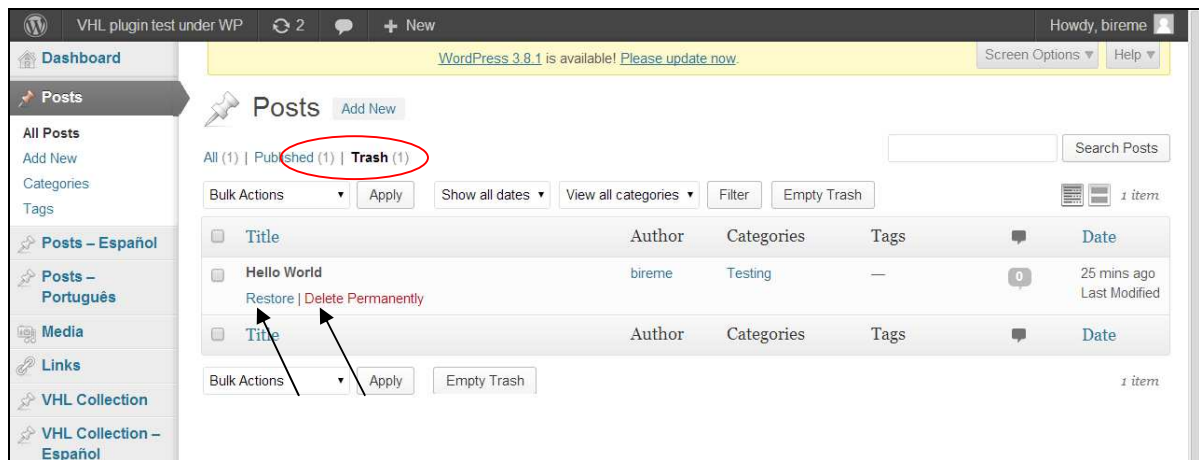


Illustration 26. Trash options

If the option View is selected it is possible to view that specific post as it is/would be published in the site.

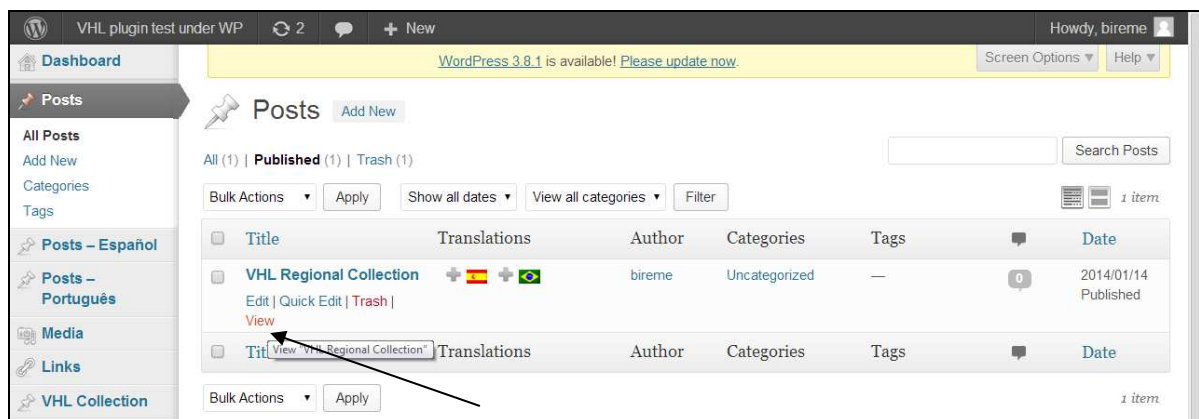


Illustration 27. Post view option

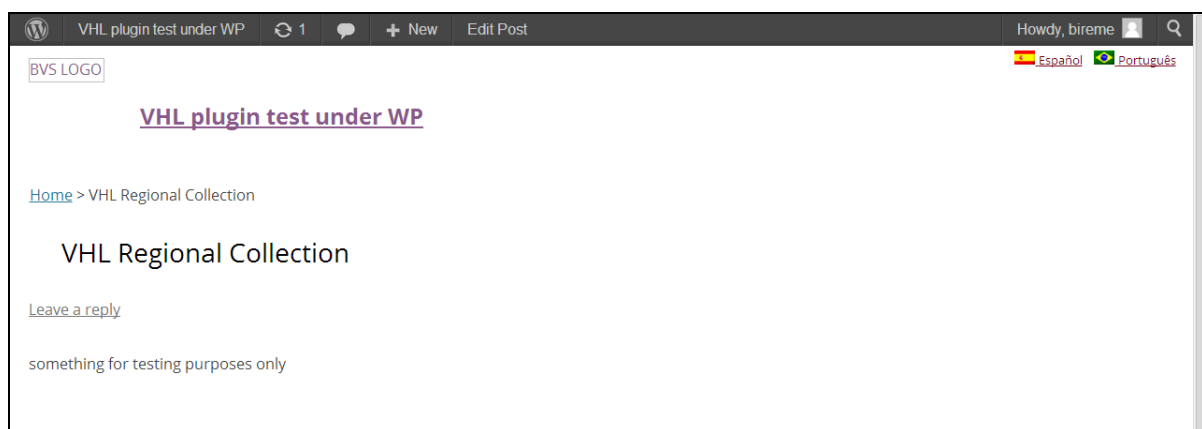


Illustration 28. Viewing the post in the portal

Categories

Categories are themes defined in Wordpress to group information in areas and/or subjects. E.g.: a news post should be marked as News. Categories can be divided into subcategories.

To create a category it is first required to type a title in the field **Name** (mandatory) and, if required, also define the **Slug**, choose the **Parent** category and fill in the **Description** (all optional fields). Then click in **Add New Category** button to create it.

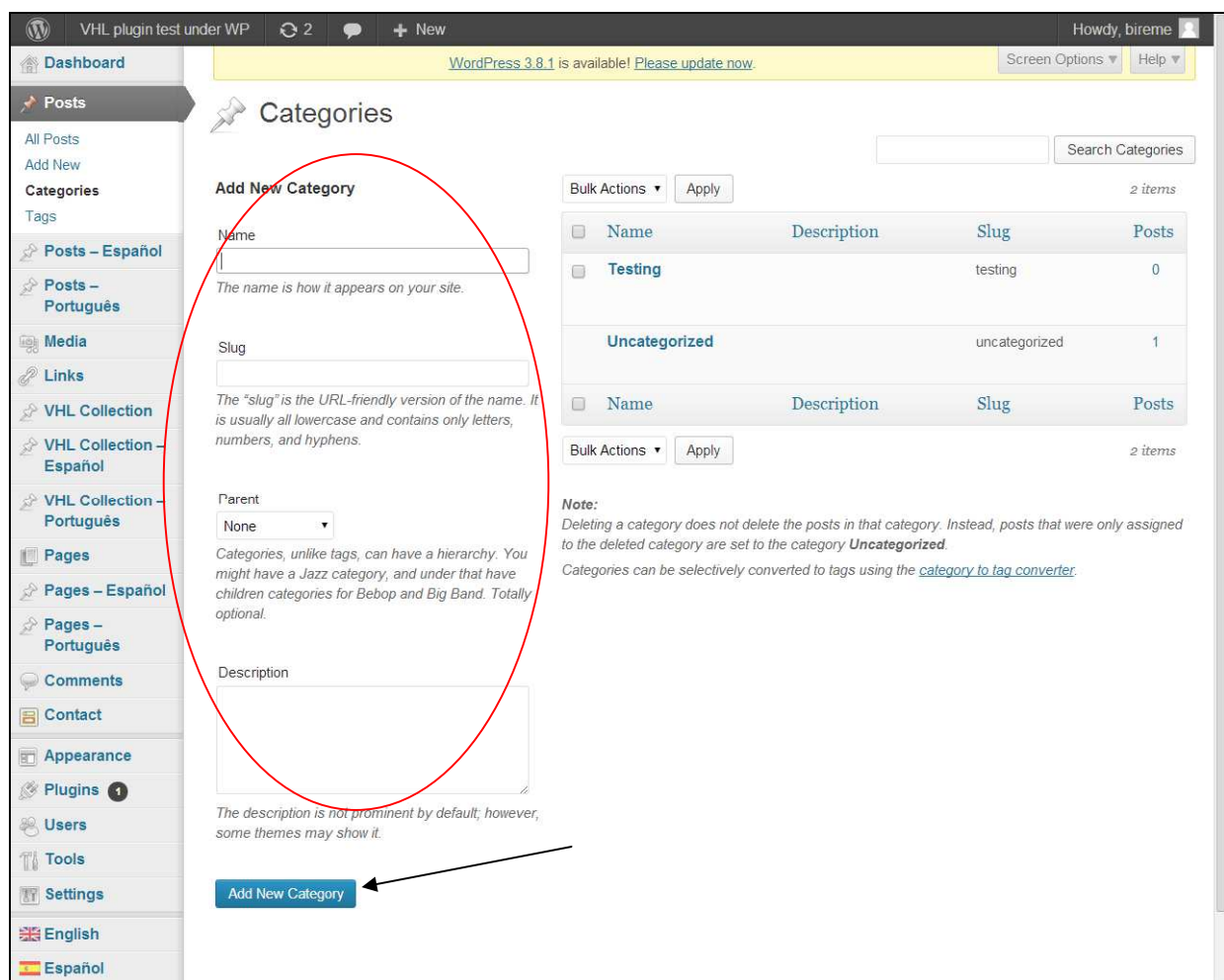


Illustration 29. Creating categories

To delete a category select it from the list and click the option **Delete**.

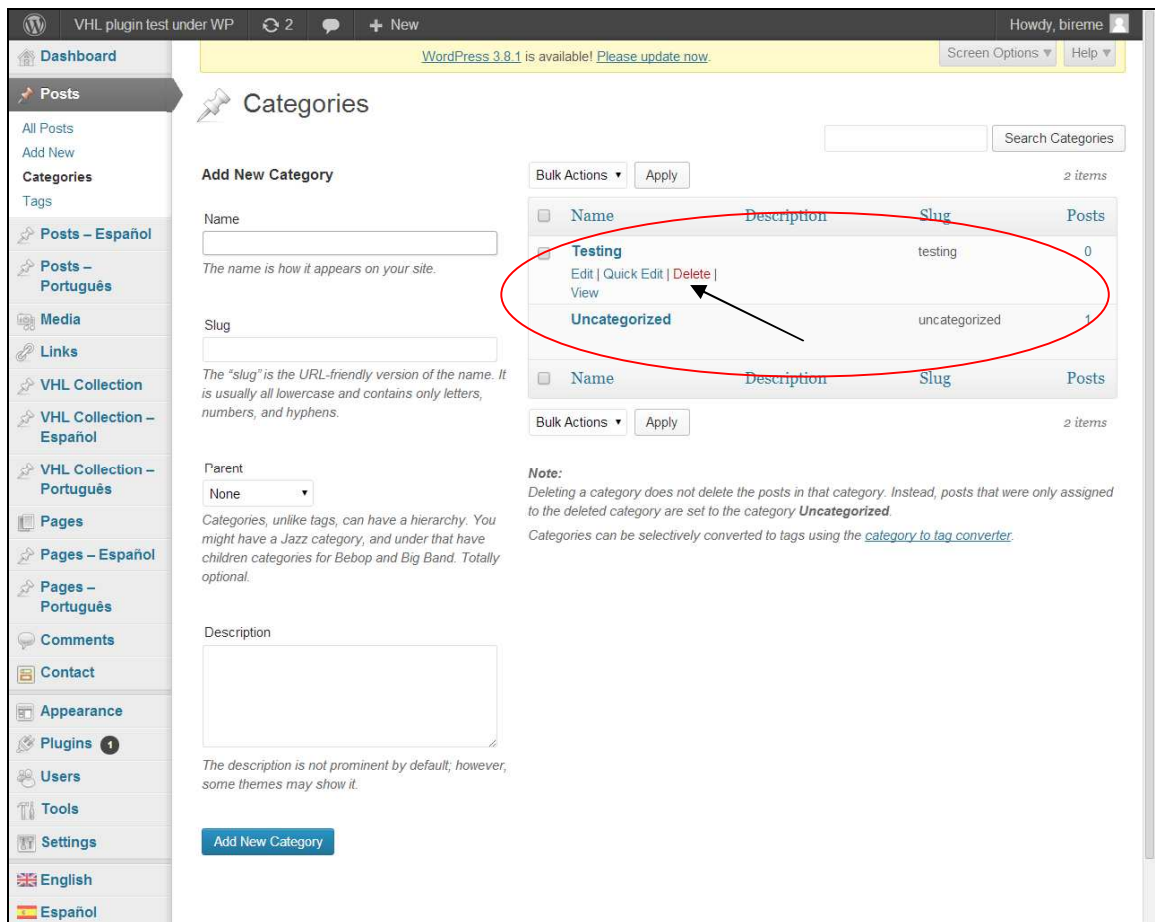


Illustration 30. Excluding categories

A new window opens requiring confirmation on the category deletion. By clicking **OK**, category will be permanently deleted. To cancel operation just click **Cancel**.

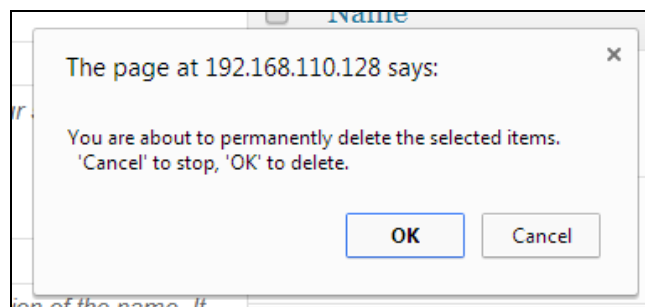


Illustration 31. Confirming category deletion

NOTE: before changing or deleting a category check if it has associated posts. By changing a category, some posts may no correspond the modified name. The same way, by excluding a category, one may delete an important data associated to a group of posts.

Tags

Tags are keywords used to classify and standardize specific content without changing their hierarchy. To create a tag, type in the tag title in the campo **Name** (mandatory) and, if required, also define the **Slug** and fill in the **Description** (optional fields). Then click in **Add New Tag** button to create it.

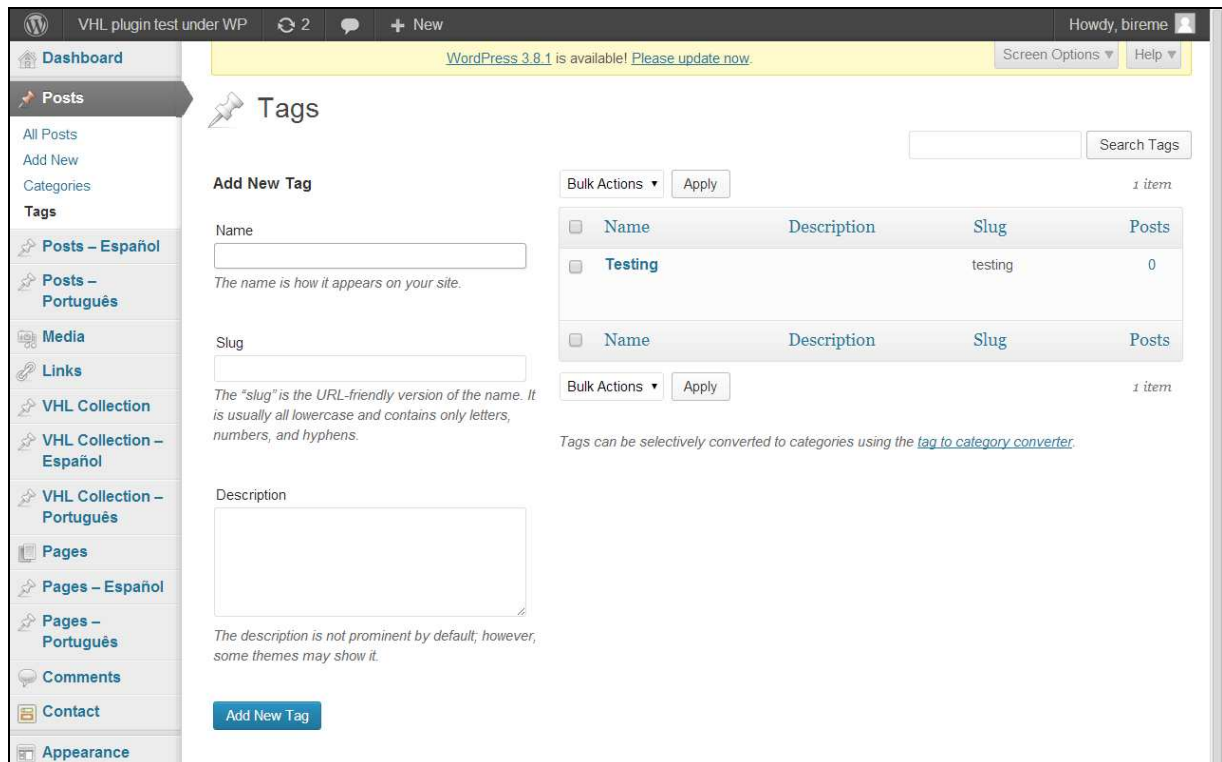


Illustration 32. Creating tags

To delete a *tag* just select it and click the option **Delete**.

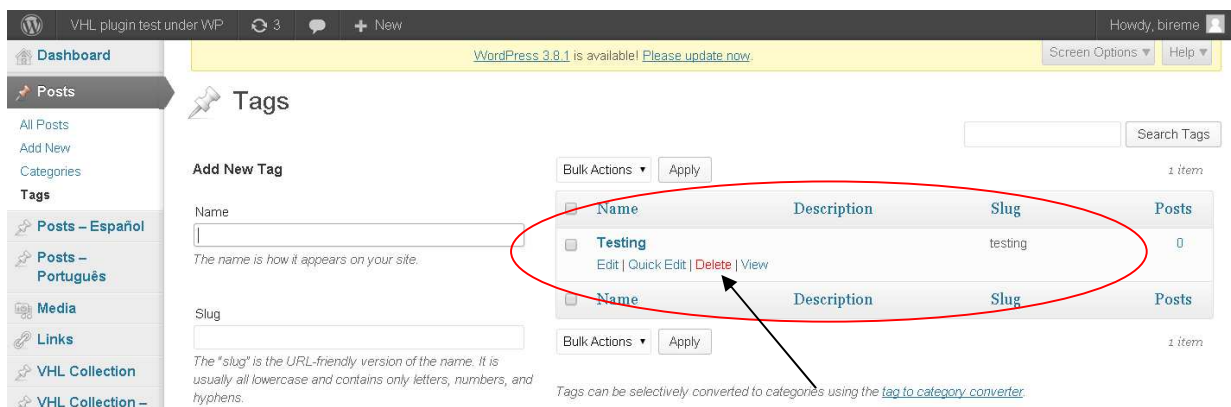


Illustration 33. Deleting tags

A new window opens requiring confirmation on the *tag* deletion. By clicking **OK**, tag will be permanently deleted. To cancel operation just click **Cancel**.

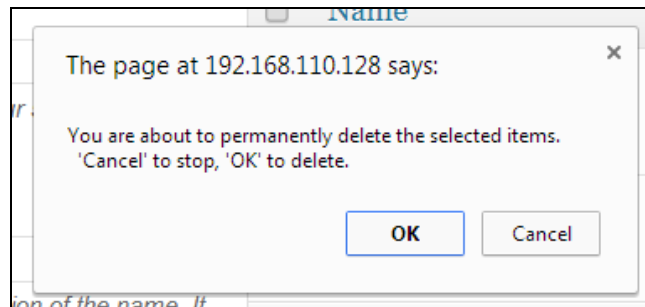


Illustration 34. Confirming tag exclusion

NOTE: changing and/or deleting tags may have the same undesirable effects described in categories. The only difference is that tags, being more specific, usually tend to affect a minor amount of posts.

Media

In **Media** one can upload images, video files, audio files etc. Whatever media to be used in a post it must be first uploaded with this option to make itself available as a media library item or identified as an external URL. In media there are the following options available: **Media Library** and **Add New**.

Media Library

Allows viewing, editing and/or deleting media files uploaded to the library by the user of the current VHL.

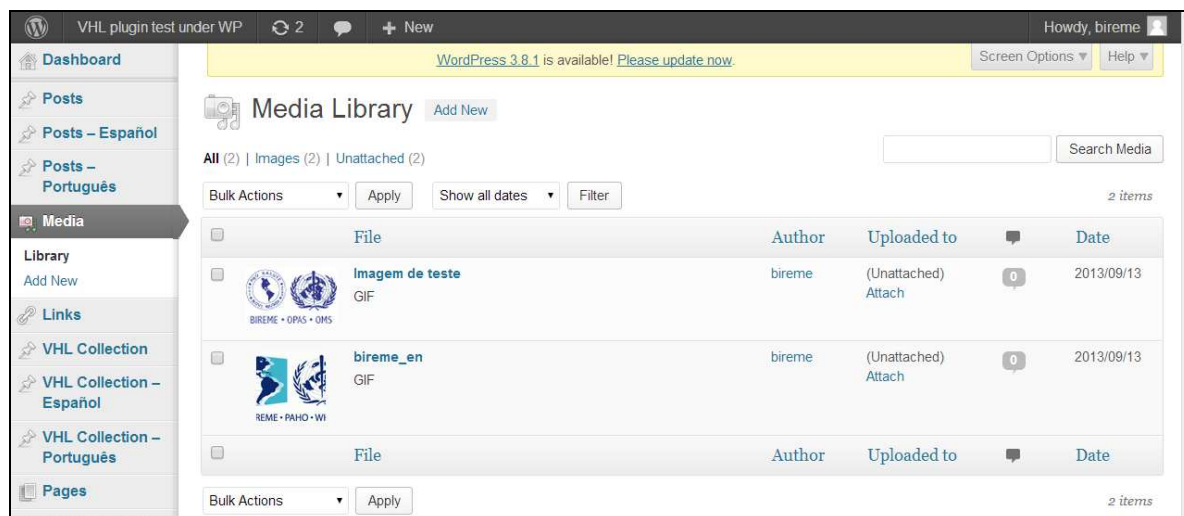


Illustration 35. Viewing media library

To filter media files by category just select the desired option: **All**, **Images** and **Unattached**.

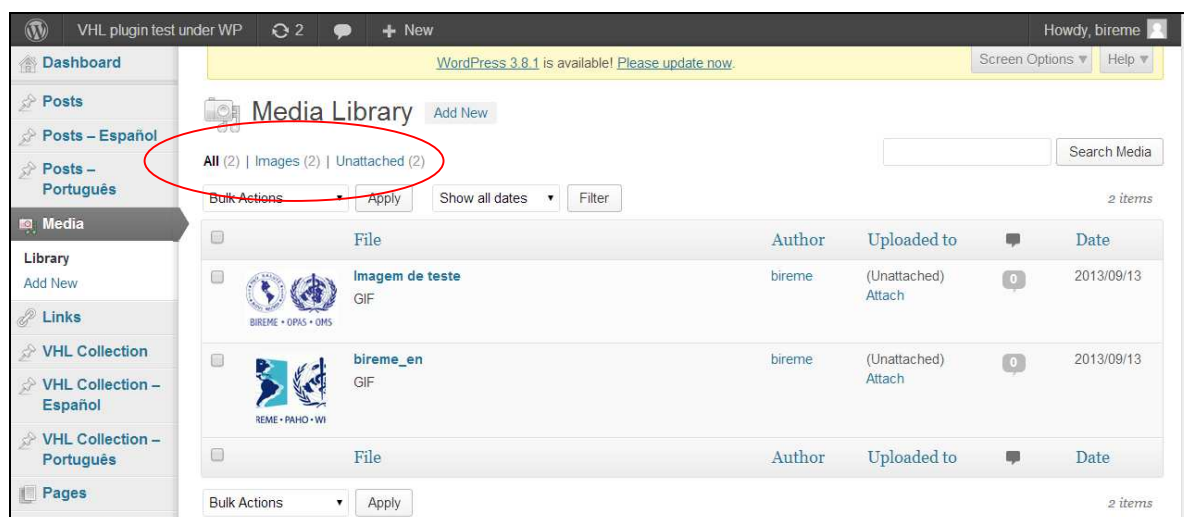


Illustration 36. Viewing all uploaded media files by categoria

To edit a media file just select one item and click **Edit**.

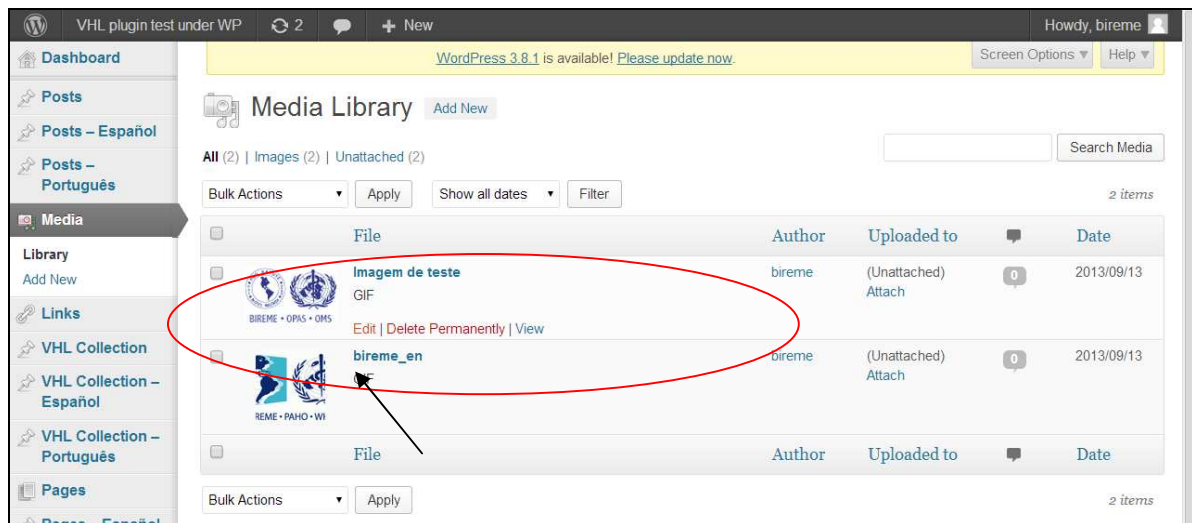


Illustration 37. Selecting a media file for editing

A new window opens with the following fields for editing: **Title**, **Alternative text**, **Caption** and **Description**. To finish editing click the **Update** button to save changes.

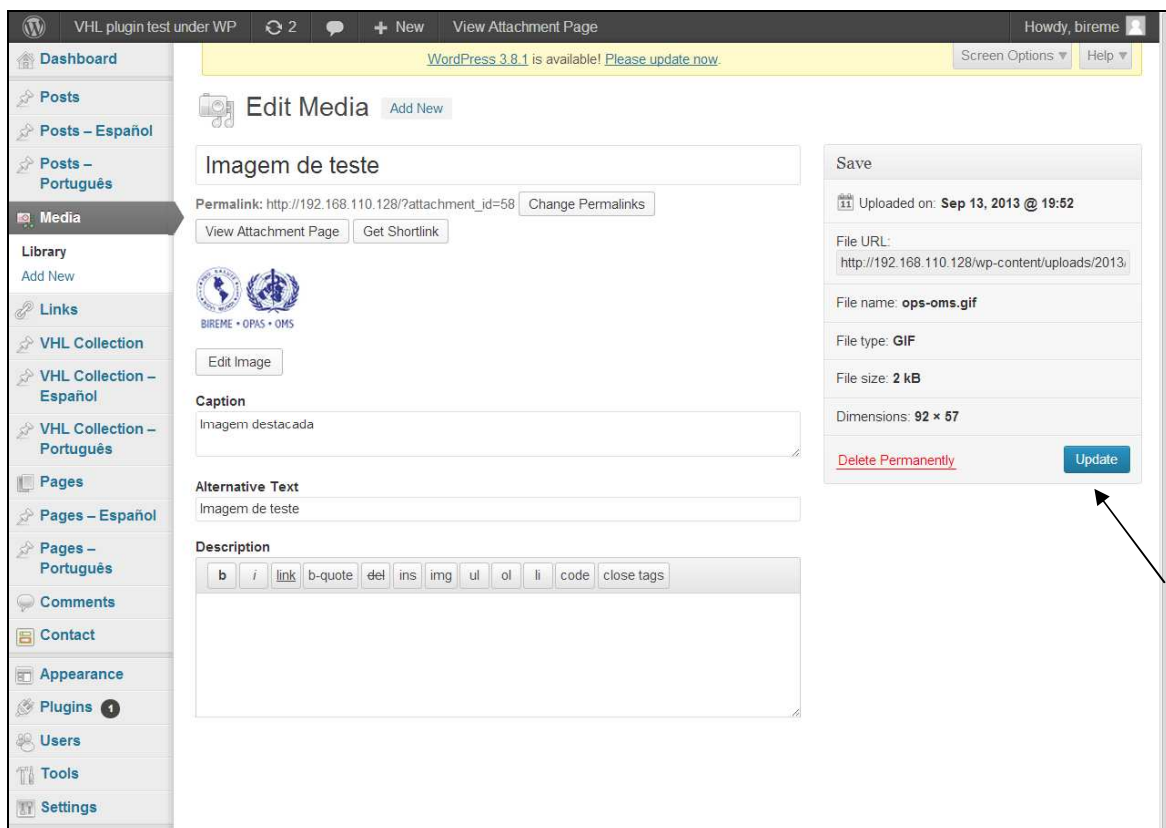


Illustration 38. Editing a media file

Moreover, there is yet the **Edit image** option that allows for editing some aspects of the image itself, such as rotate (right or left), resize, crop, flip etc.

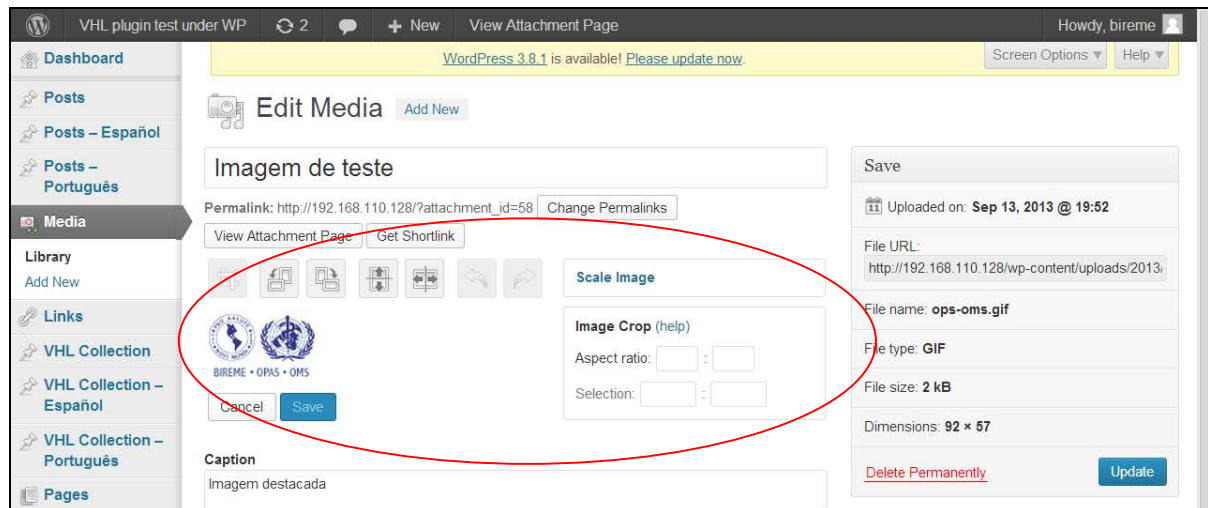


Illustration 39. Editing aspects of an image

To delete a media file, just select it and click the **Delete permanently**.

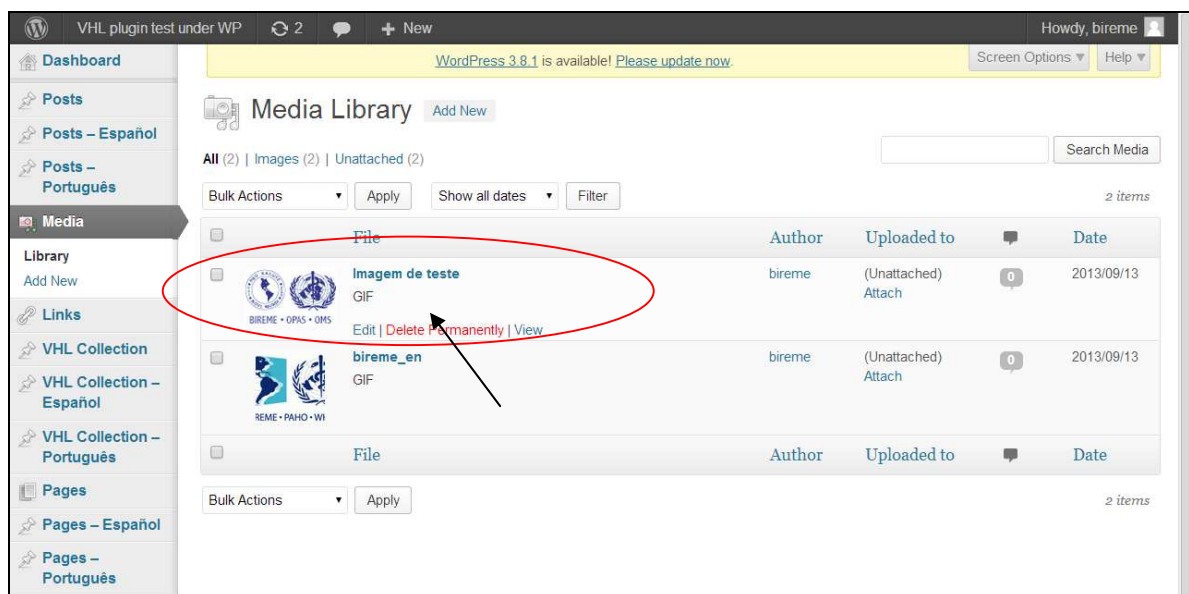


Illustration 40. Deleting a media file

A new window opens requiring confirmation on the *media* deletion. By clicking **OK**, media file will be permanently deleted. To cancel operation just click **Cancel**.

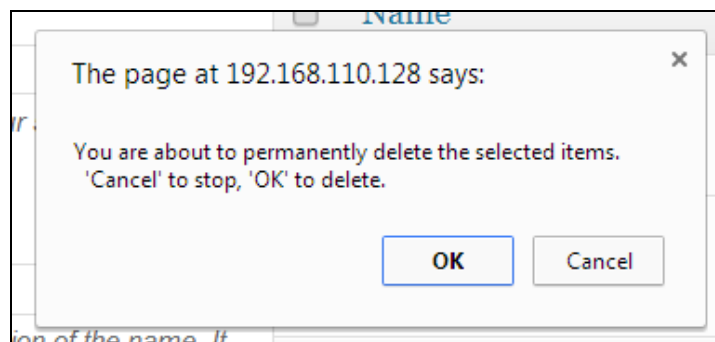


Illustration 41. Confirming media file exclusion

To view a previously uploaded media file, just select it and click the option **View**.

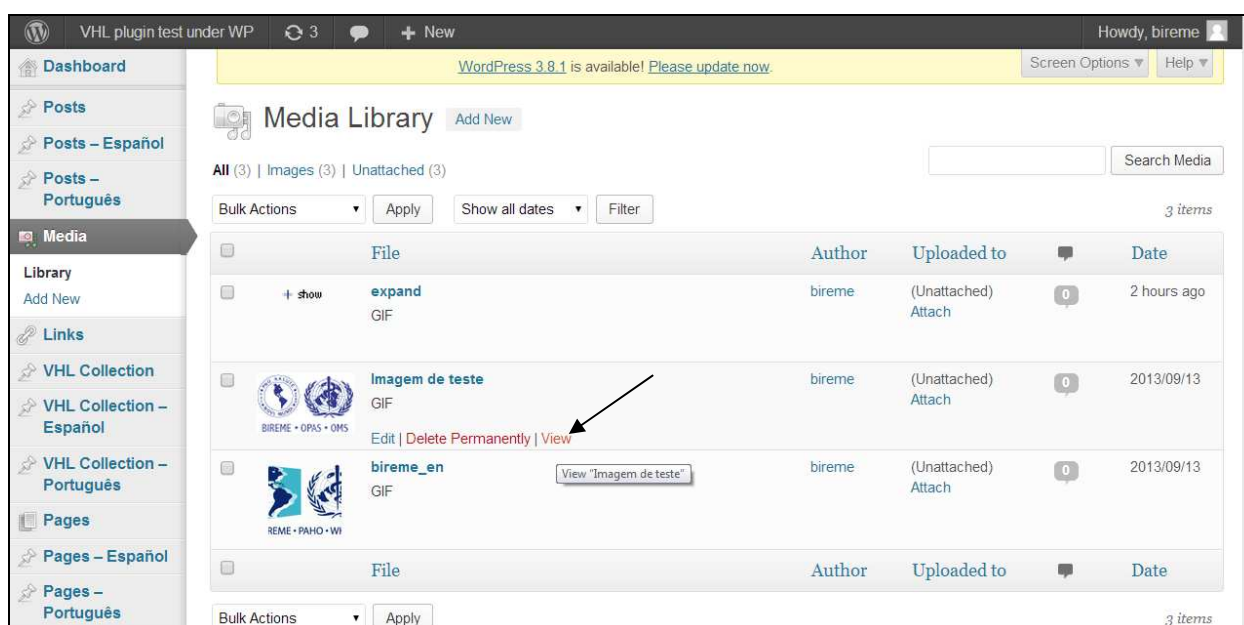


Illustration 42. Option to view media file before it is published

A new window opens to show the selected media in the format and layout previously set in the Portal.

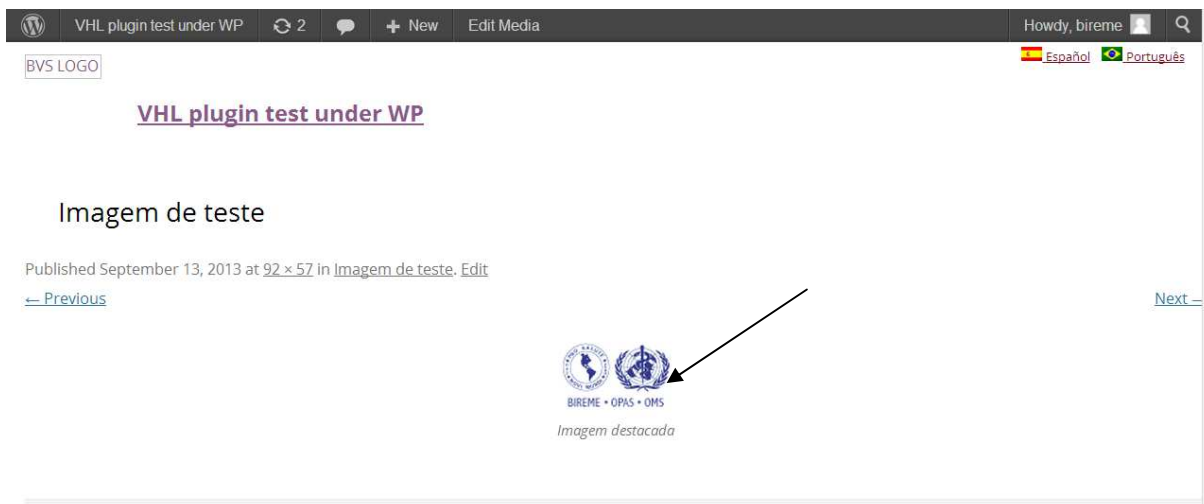


Illustration 43. Viewing media layout in portal

Add new

To add any media file click **Add new** and then click the **Select files** button.

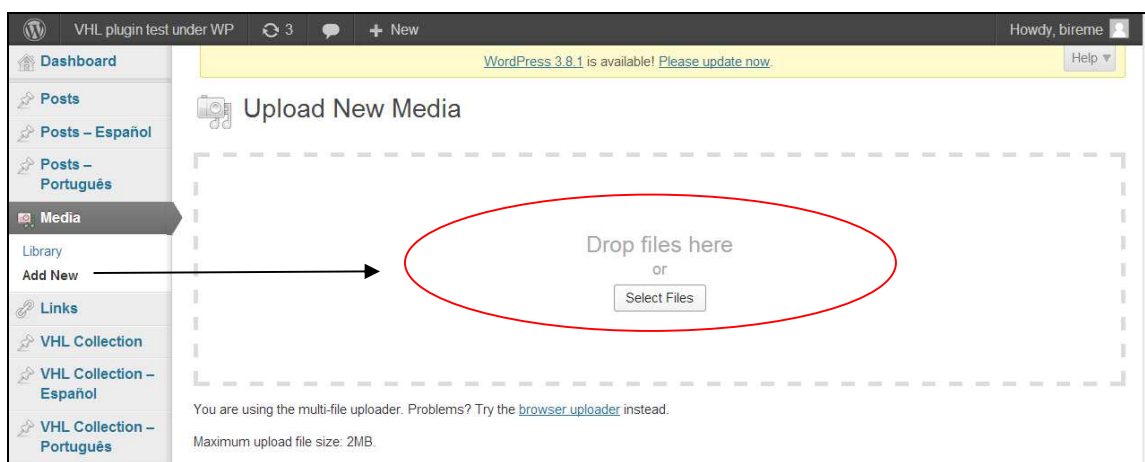


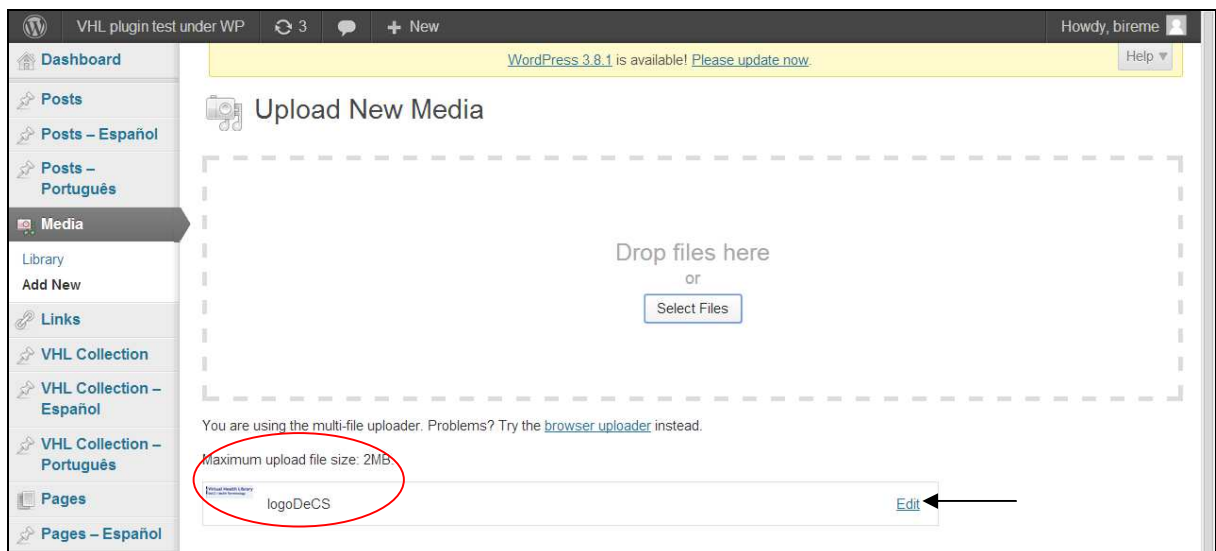
Illustration 44. Adding new media file(s)

Locate the image, select it and click the Open button to insert it. It is also possible to drop file(s) over the hatched area.



Illustration 45. Selecting a new media file

After uploading the media file it is required to fill in some fields to describe the file by using the **Edit** button. The fields are: **Title**, **Alternative text**, **Caption** and **Description**. To save all data click the **Update** button.



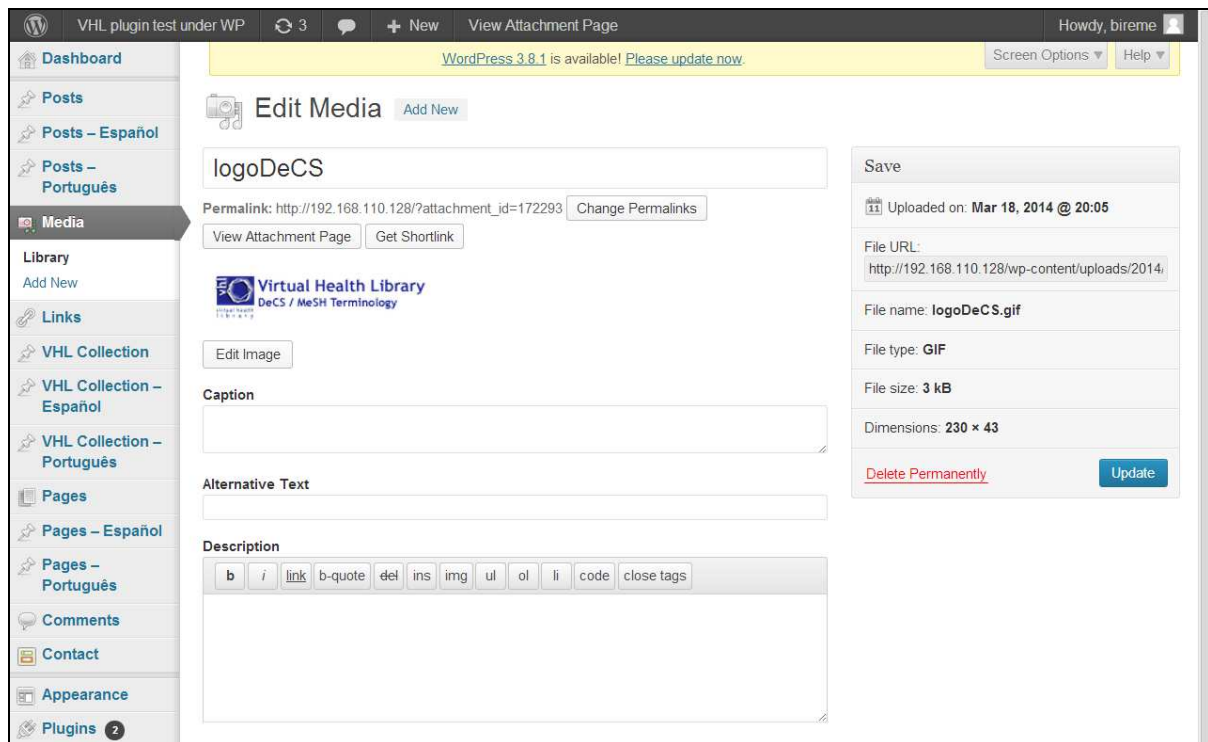


Illustration 46. Saving a new media file

Links

All links one requires to publish in a VHL being created will use the **Links (*)** option. By clicking on **Links** the following options apply: **All links**, **Add new** and **Links categories**.

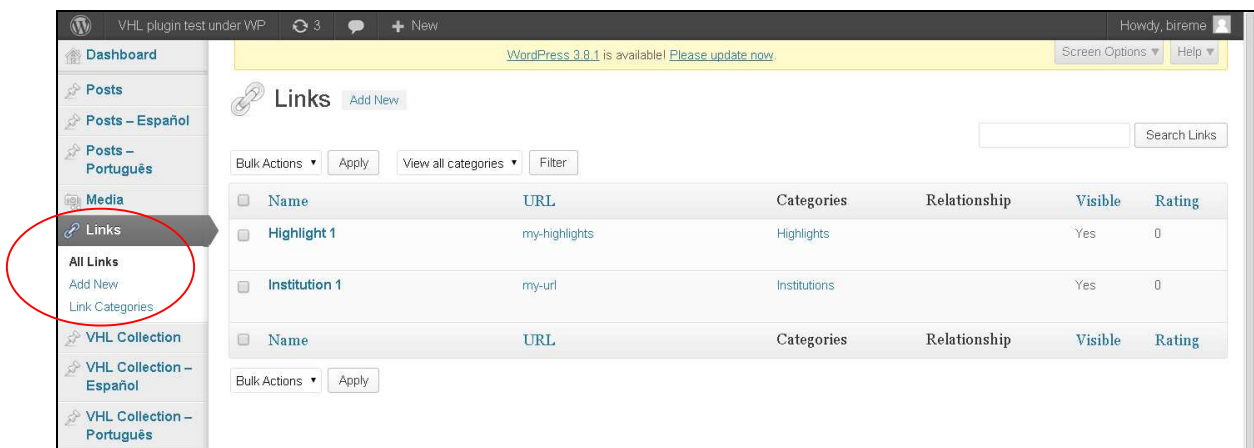


Illustration 47. Viewing all links

(*) The **Links** option is only automatically available when using the **Multi-site** option in Wordpress.

All links

All links make possible to view all link items created and after selecting one it is also possible to edit and/or delete it. To edit a *link* just select it and click **Edit**.

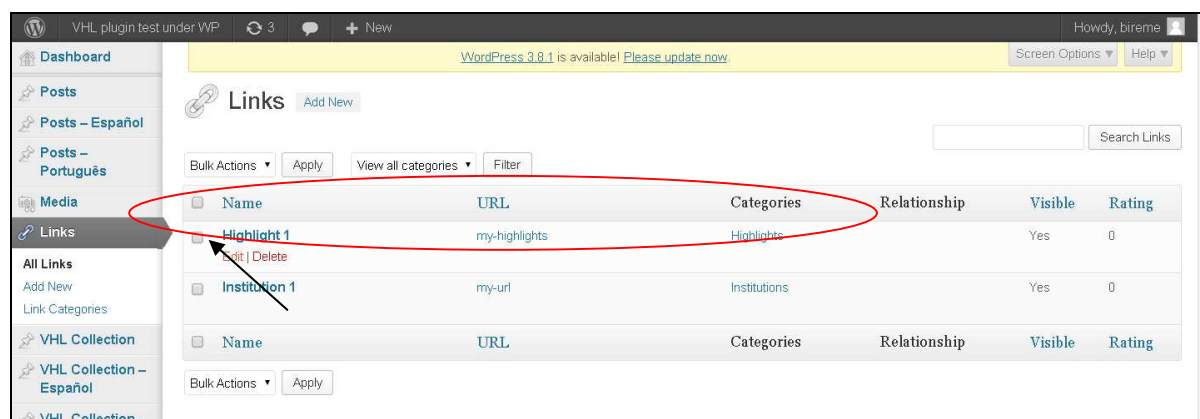


Illustration 48. Selecting a link for editing

A new window opens with the following fields: **Name**, **Web address**, **Description** and **Categories**. Click the **Update link** button to resume updating.

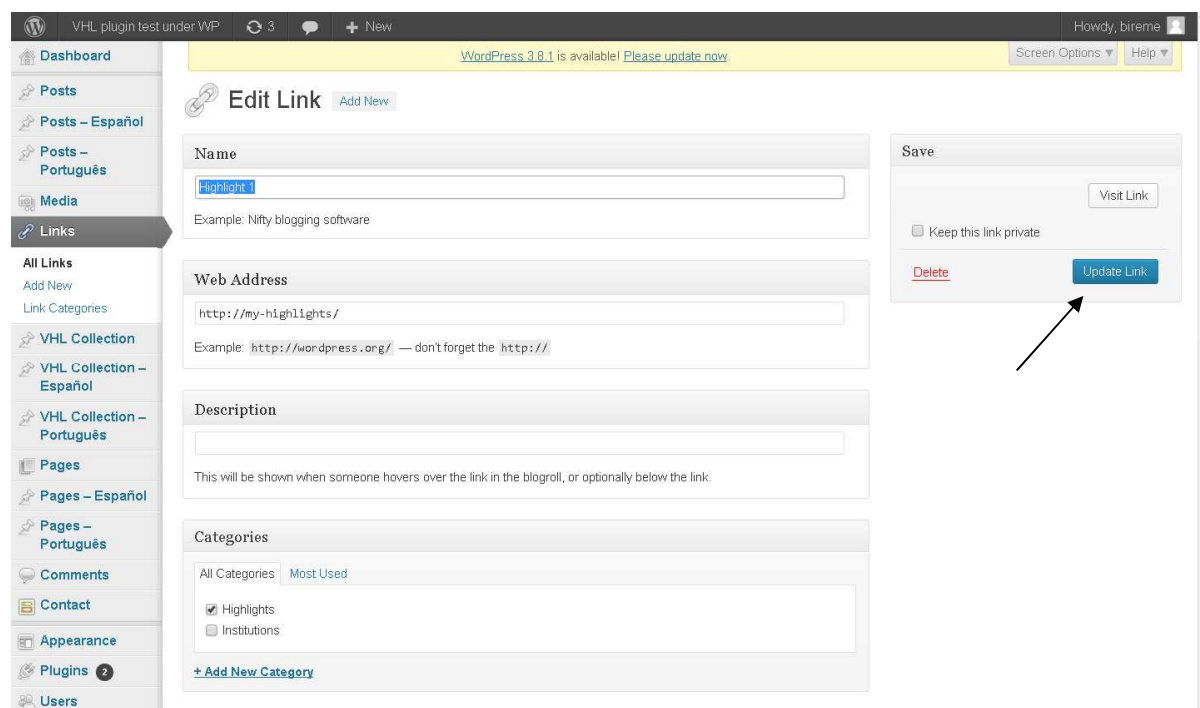


Illustration 49. Editing a link

To delete a link just select it and click the **Delete** option.

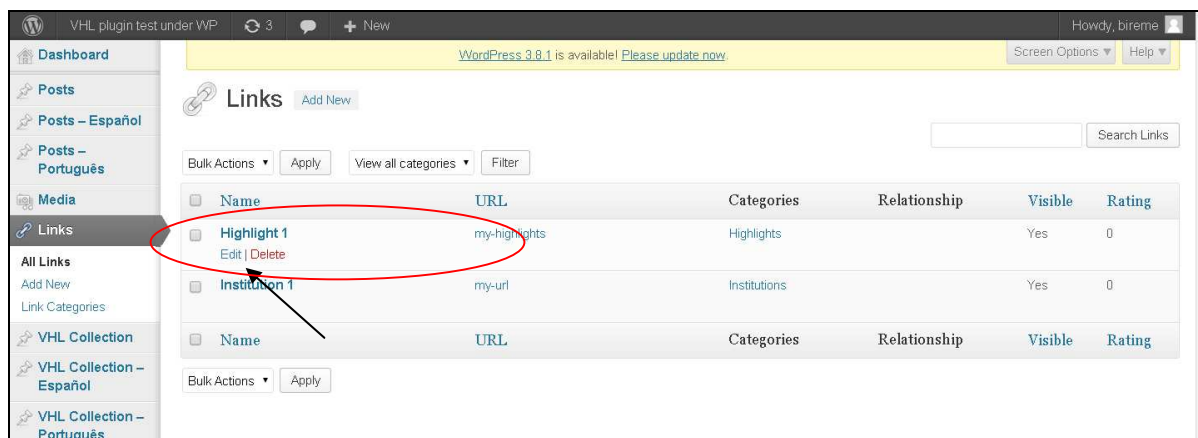


Illustration 50. Deleting a link

A new window opens to ask for confirmation on the link deletion. Click **OK** to confirm to exclude it. Click **Cancel** to abort deletion.

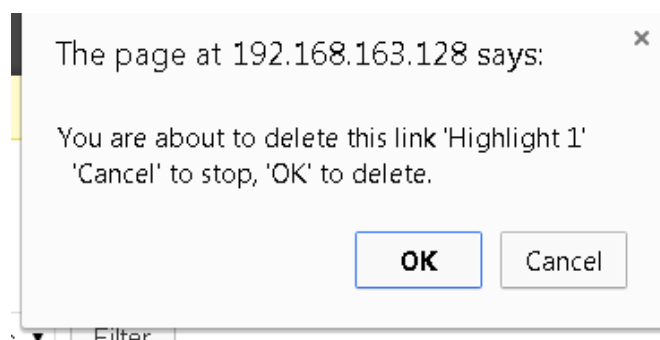


Illustration 51. Confirming link deletion

Add new

To include a new *link* the following fields must be filled in: **Name**, **Web address**, **Description**, **Categories** and **Image** (if relevant). Click the **Add link** button to resume operation.

VHL plugin test under WP

WordPress 3.8.1 is available! [Please update now.](#)

Screen Options

Help

Howdy, bireme

Dashboard

Posts

Posts – Español

Posts – Português

Media

Links

All Links

Add New

Link Categories

VHL Collection

VHL Collection – Español

VHL Collection – Português

Pages

Pages – Español

Pages – Português

Comments

Contact

Appearance

Plugins 2

Users

Tools

Settings

English

Español

Português

Collapse menu

Add New Link

Add New

Name

Example: Nifty blogging software

Web Address

Example: <http://wordpress.org/> — don't forget the <http://>

Description

This will be shown when someone hovers over the link in the blogroll, or optionally below the link.

Categories

All Categories

Most Used

☐ Highlights

☐ Institutions

[+ Add New Category](#)

Target

☐ _blank — new window or tab.

☐ _top — current window or tab, with no frames.

☐ _none — same window or tab.

Choose the target frame for your link.

Link Relationship (XFN)

rel:

identity

☐ another web address of mine

friendship

☐ contact ☐ acquaintance ☐ friend ☒ none

physical

☐ met

professional

☐ co-worker ☐ colleague

geographical

☐ co-resident ☐ neighbor ☒ none

family

☐ child ☐ kin ☐ parent ☐ sibling ☐ spouse ☒ none

romantic

☐ muse ☐ crush ☐ date ☐ sweetheart

If the link is to a person, you can specify your relationship with them using the above form. If you would like to learn more about the idea check out [XFN](#).

Save

☐ Keep this link private

Add Link

Advanced

Image Address

RSS Address

Notes

Rating 0 (Leave at 0 for no rating.)

Thank you for creating with WordPress.

[Get Version 3.8.1](#)

Illustration 52. Adding a new link

Link categories

Link categories are similar to post categories and are defined in Wordpress to group information in themes or subjects. E.g.: a *link* can be placed in the **Publications** category.

To create a category just type in the category title in the **Name** (mandatory) and if required, a **Slug** can be defined and one can provided a brief **Description** (optional fields). Click **Add link category** to save changes.

Link Categories

Add New Link Category

Name
The name is how it appears on your site.

Slug
The "slug" is the URL-friendly version of the name. It is usually all lowercase and contains only letters, numbers, and hyphens.

Description
The description is not prominent by default, however, some themes may show it.

[Add New Link Category](#)

Name	Description	Slug	Links
Highlights		destacados	1
Institutions		instituciones	1
Name -	Description	Slug	Links

Illustration 53. Creating a new link category

To edit a link category click the option **Edit**.

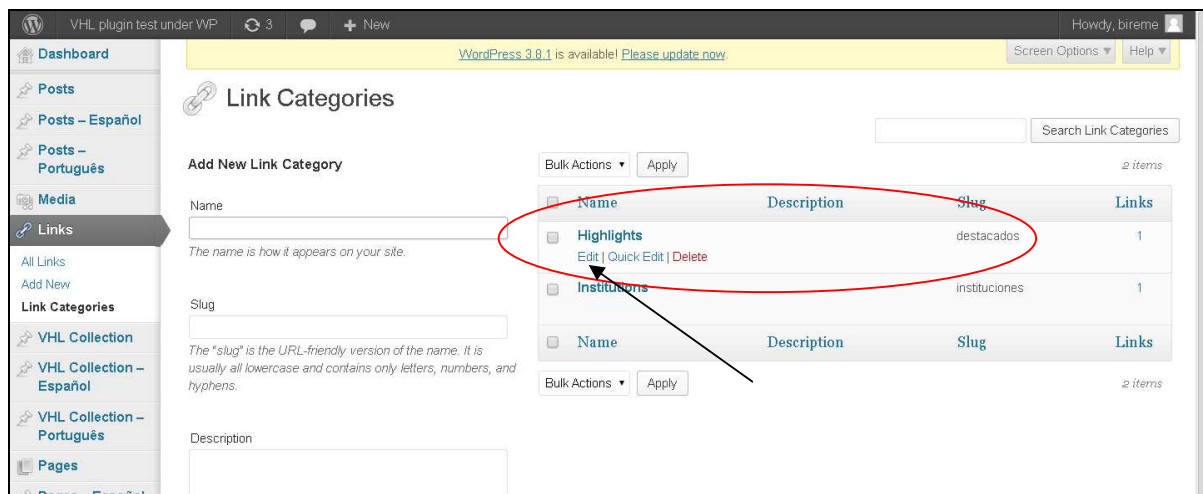


Illustration 54. Editing a link category

To exclude a link category just select it and click the **Delete** option.

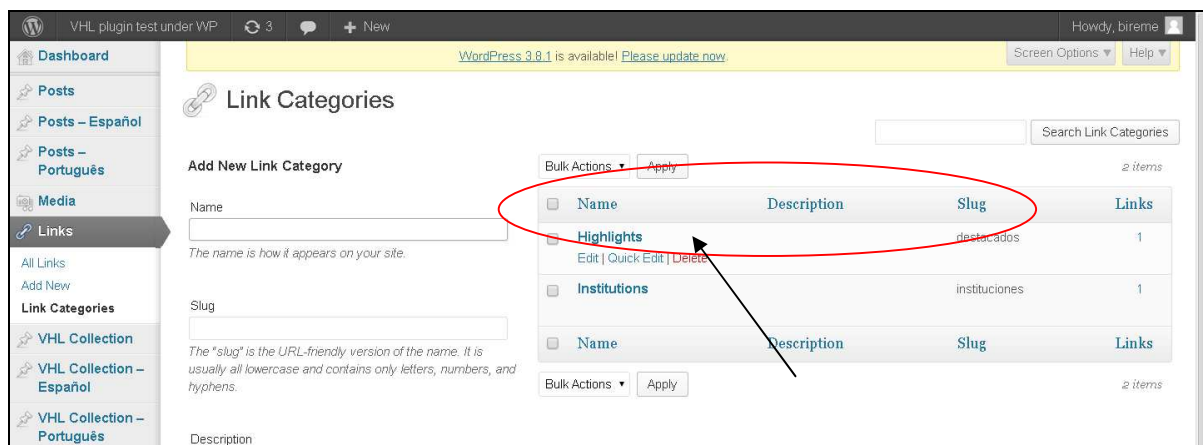


Illustration 55. Deleting a link category

A new window opens to confirm the exclusion of the link category. Click **OK**, to delete and **Cancel** to abort operation.

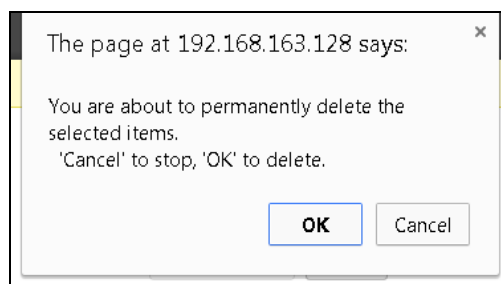


Illustration 56. Confirming deletion of a link category

NOTE: before changing and/or deleting link categories, check if those categories are in use to avoid losing valuable information related to the contents.

Pages

Pages are static contents and do not have associated categories. E.g.: **Contact**. In Pages the following options are available: **All pages** and **Add new**.



Illustration 57. Viewing pages

All pages

Displays all existing pages and after selecting one item, it is possible to either **Edit**, **Quick edit**, **Trash** and/or **View** it.

To modify any information from a page just select it and click the **Editar** option.

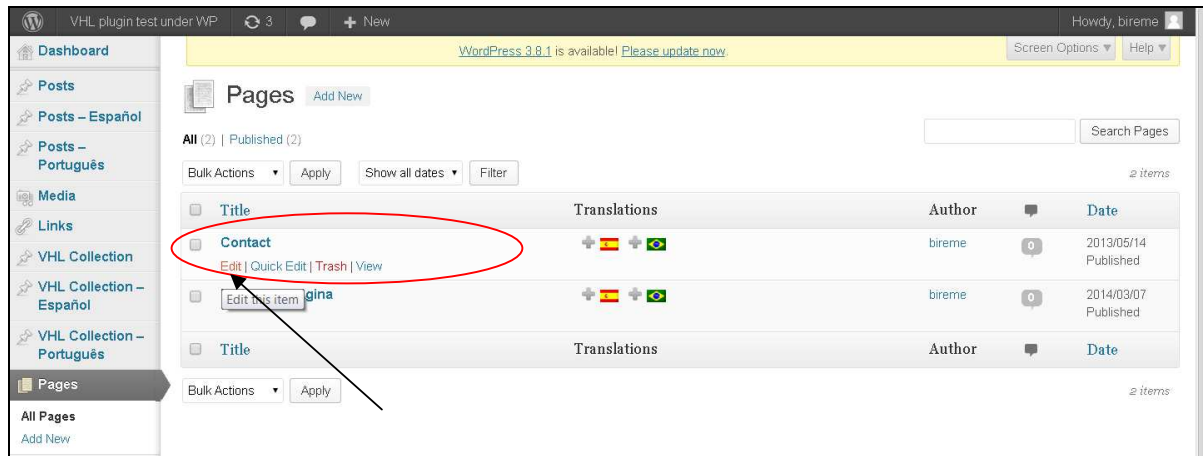


Illustration 58. Seleccionando una página para edición

A new window opens to allow editing the main fields such as: **Title**, **Permanent link** and the text.

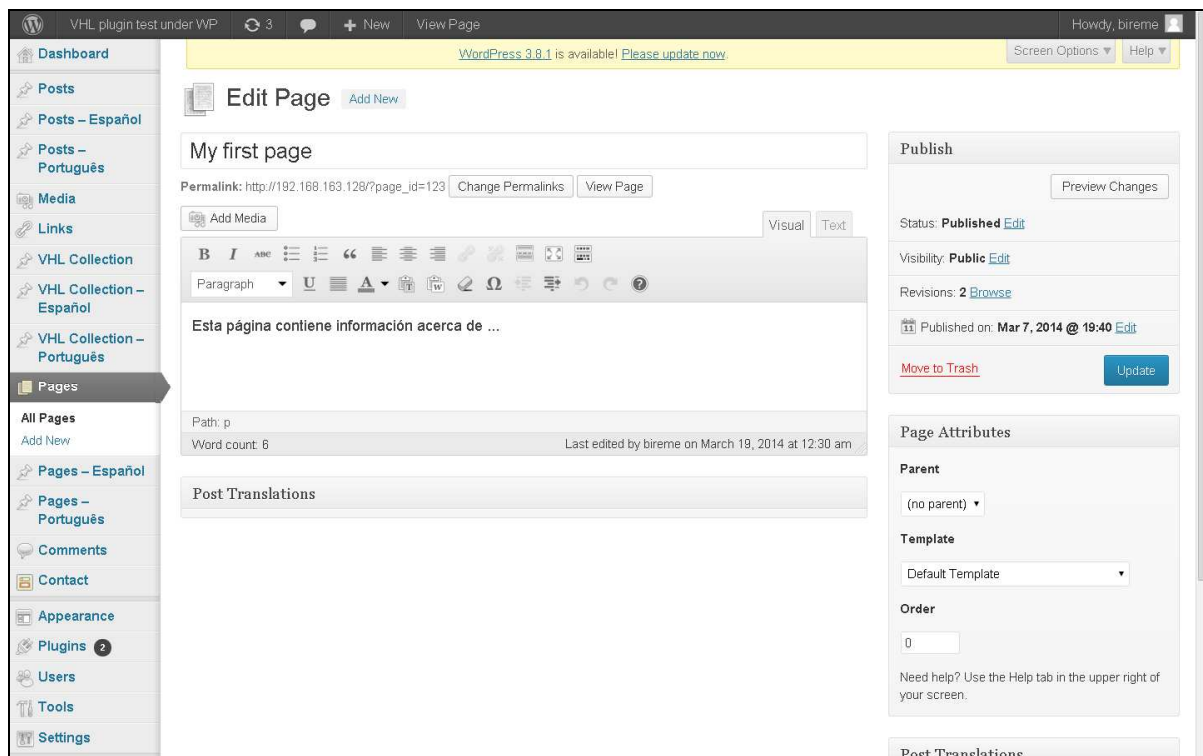


Illustration 59. Editing a page

To save current changes click **Publish** button.

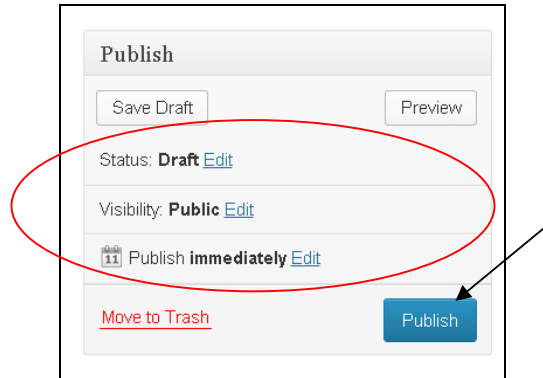


Illustration 60. Publishing a page

Add new

To add a new static page just click **Add new** and a new window will open with the main fields to be filled in: **Title**, **Text** and **Discussion**. By adding a **Title**, the system automatically generates the **Web address** - that can be changed anytime.

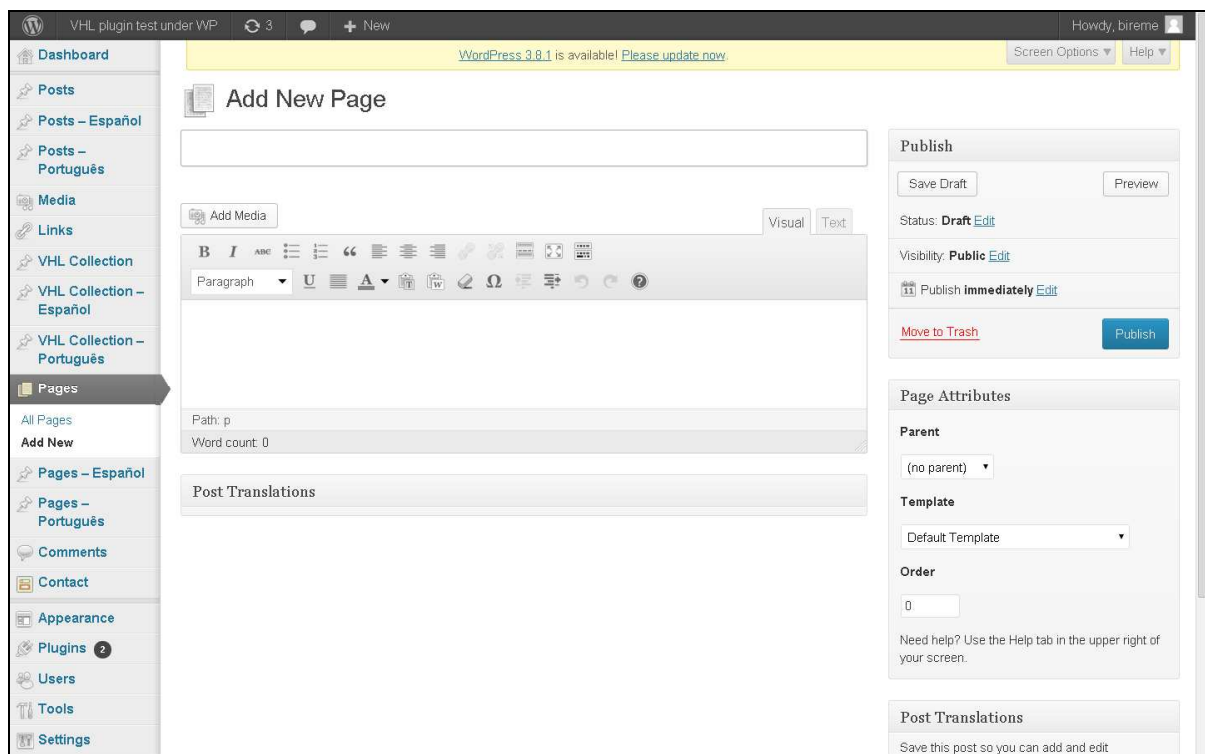


Illustration 61. Adding a new page

Here it is also possible to **Save draft** to make page available for editing but almost ready to be published.

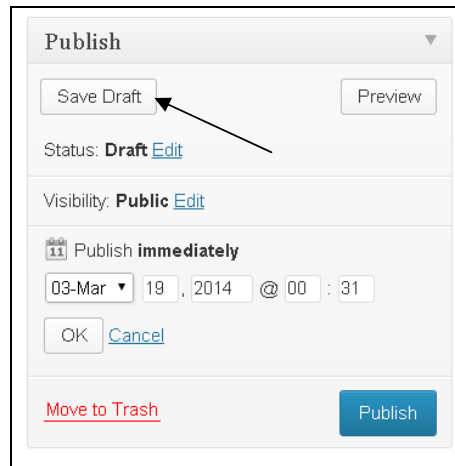


Illustration 62. Saving draft mode

One can also **View** before publishing or view a change recently made and not yet saved.

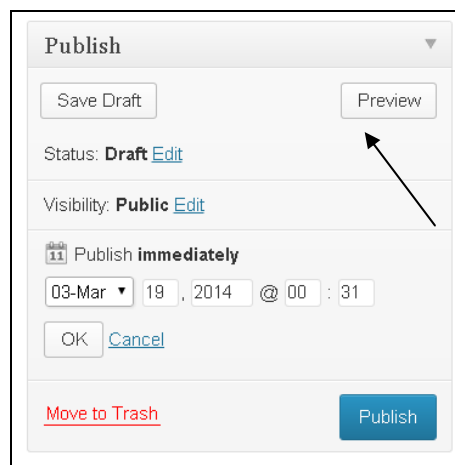


Illustration 63. Viewing a page before publishing

And for last, the **Publish** page .

Publish

Save Draft

Preview

Status: **Draft** [Edit](#)

Visibility: **Public** [Edit](#)

11

Publish **immediately**

03-Mar ▾

19

, 2014

@ 00

:

31

OK

[Cancel](#)

[Move to Trash](#)

Publish

Illustration 64. Publishing a page

VHL Collection

Comprises the entire collection of information sources of the VHL, being: *Themes, Information sources, About the VHL* etc.

Collections of sources

In **VHL Collection** it is possible to view all collections created in the scope of the VHL, as well as to edit and/or delete them.

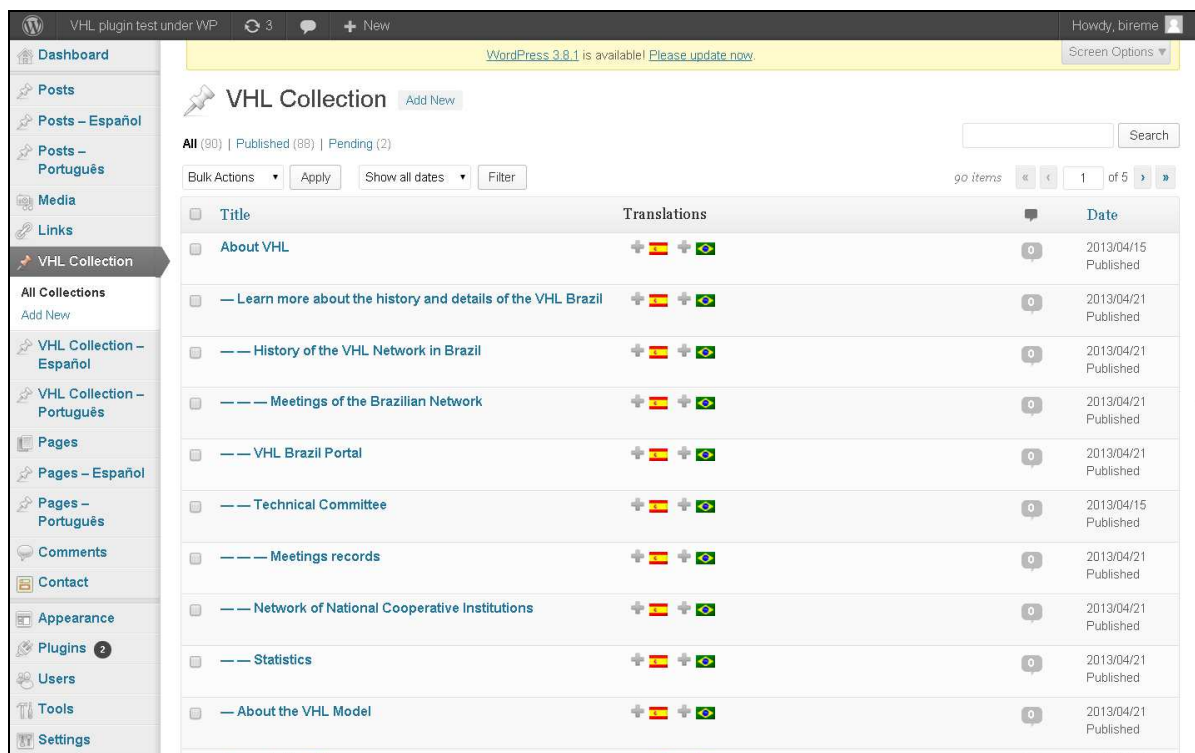


Illustration 65. Coleção BVS – VHL Collection of information sources

Add new

To include a new item or a new collection just click **Add new** and fill in the following mandatory fields: **Name**, **Description** (if relevant) and **Page URL**.

Notice that field section *Post translation* is disabled. This feature will remain locked until the collection is published.

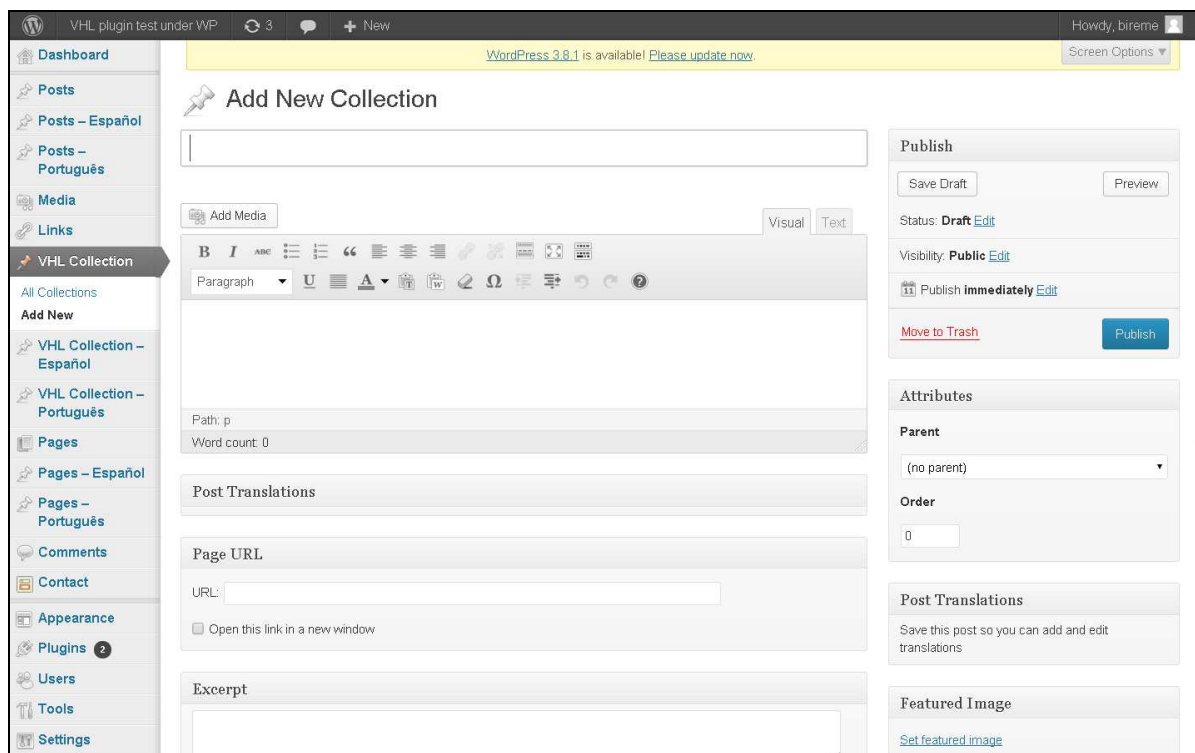


Illustration 66. Coleção BVS – Adding a new collection or item

Additionally, it is possible to fill in the **Excerpt** or even add new fields and values through the *Custom field* section, e.g. like metadata of a collection.

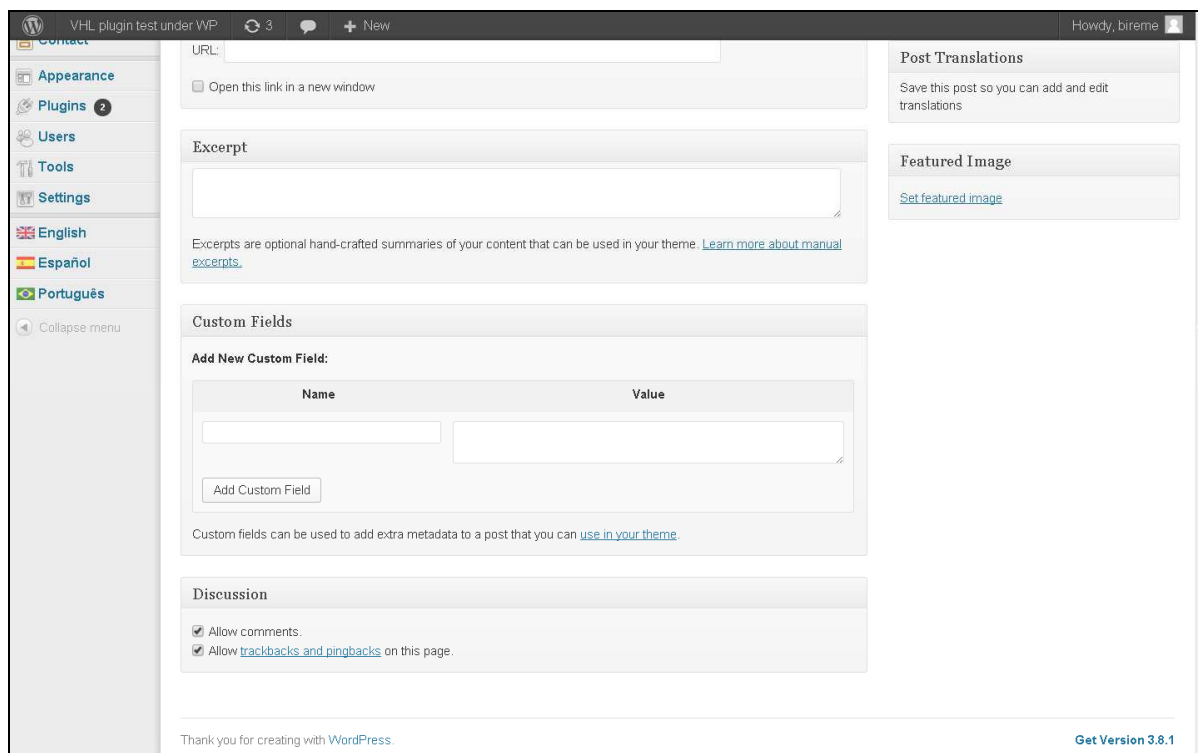


Illustration 67. Coleção BVS – Adding a new collection or item (continued)

On the right side of the panel the system displays current *Status* of the collection (or item). Users may change it to *Pending review* or keep it as *Draft* until it is published. It is also possible to *Preview* the item before it has been published, and even before saving it as a draft.

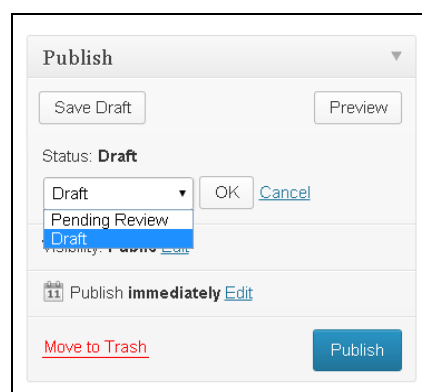


Illustration 68. VHL Collection – Adding a new collection or item – publishing modes

Still in the publishing tab one can choose the visibility of the item between *Public* (default), *Password protected* and *Private*, as well as to decide either publishing *immediately* or by schedule.

Illustration 69. Coleção Collection – Adding a new collection or item – publishing modes

In addition to the fields above, in the **Attributes** tab it will be possible to select in **Parent** field whether this new item will be part of an existing collection or if it will star a new one. Besides, user can define the presentation order below that *parent*.

Illustration 70. VHL Collection – Defining attributes and presentation order

Notice that until the collection/item is not saved one cannot view or edit associated translations.

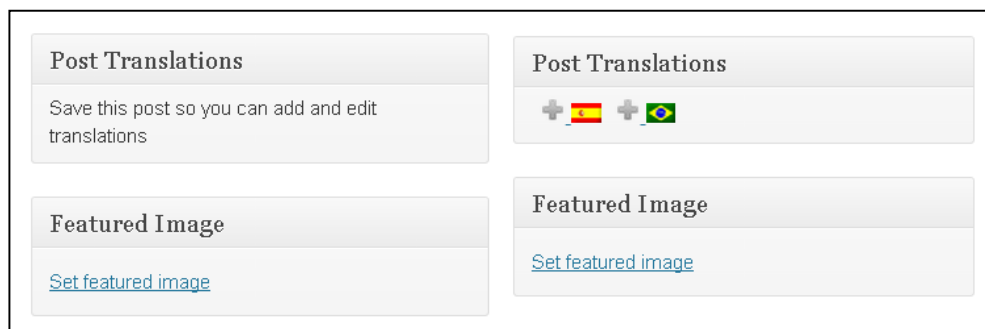


Illustration 71. VHL Collection –Post Translations status before and after saving the item

Comments

It allows the management of feedback given by the Portal users. For further information on how to use this feature, please access the WordPress online manual available at:

http://codex.wordpress.org/Main_Page

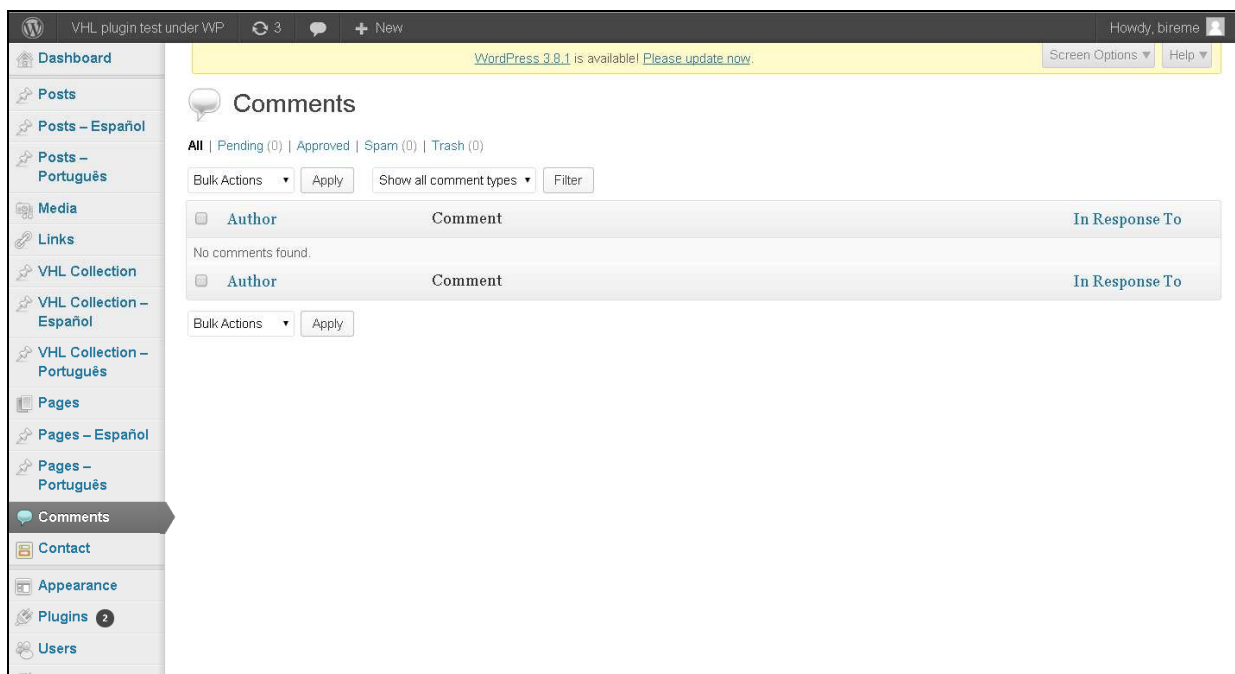


Illustration 72. Viewing comments' options

Appearance

Below Appearance there are the following options: **Themes, Customize, Widgets, Menus** and **Theme options**.

Themes

WordPress allows changing easily the appearance of a blog, site or portal by using themes. The VHL plugin has a default theme to be used as a template. For further information on the operation of Themes, please access the WordPress online manual available at:

http://codex.wordpress.org/Main_Page

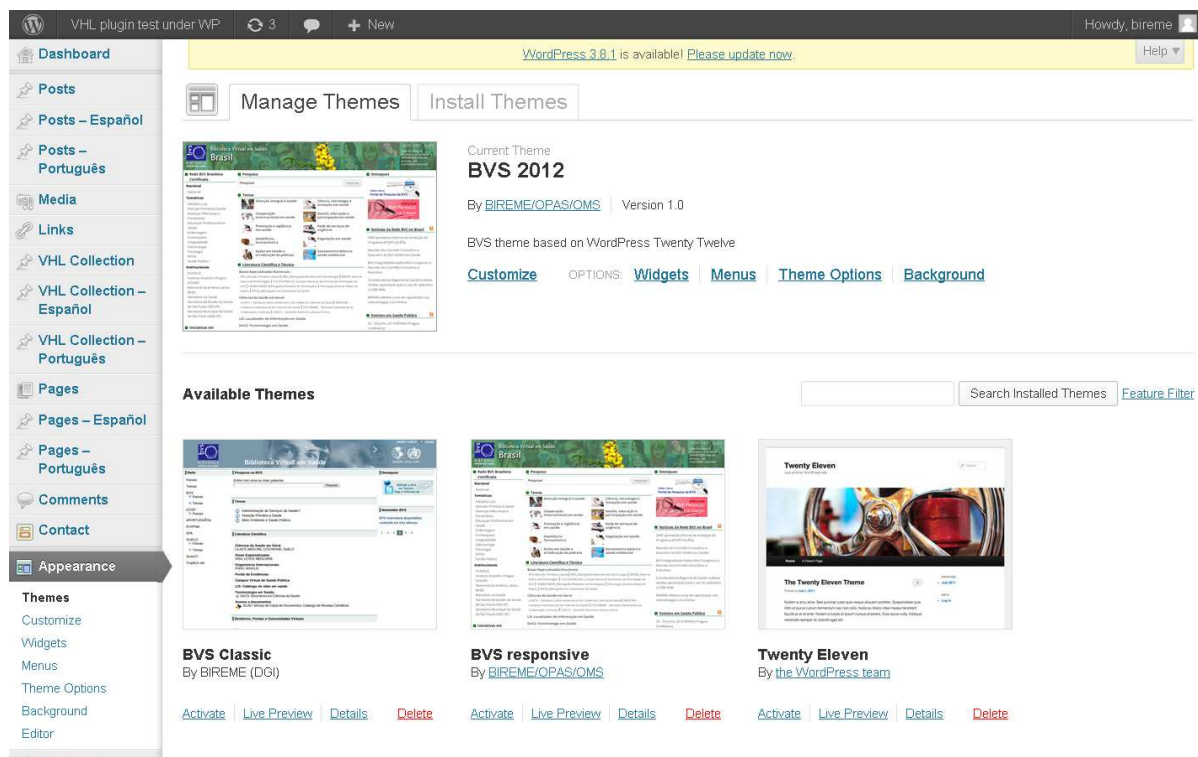


Illustration 73. Managing themes

Customize

This section allows changing some fields associated to the selected theme.

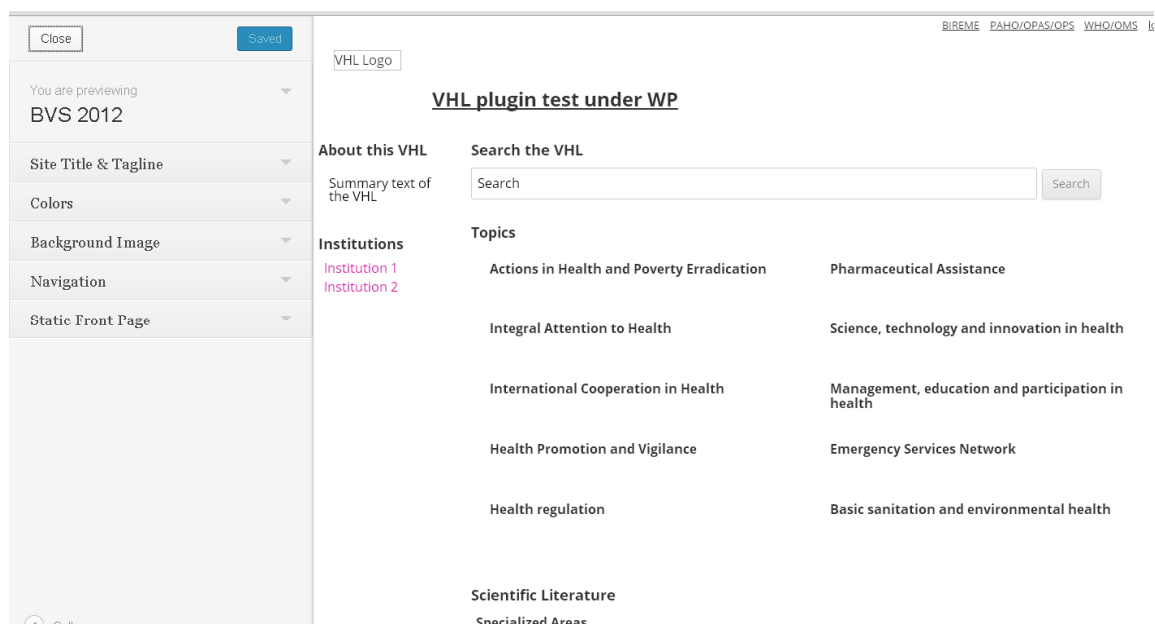


Illustration 74. Theme customization screen

However, the customization done in this section affect only *Posts* and *Pages* which are Wordpress native data types. The setting up of *VHL Collection* data types are defined by the **Theme options** section described later in this chapter.

Site title and tagline

Defines the title and subtitle of the web navigator window when one reaches the portal. It is also possible to modify these fields through **Settings > General**.

The options listed below do affect only the standar version of Wordpress without the VHL plugin set and running provided the VHL theme overwrites the standard one.

- Colors
- Background image
- Navigation
- Static front page

Widgets

Widgets are small pieces of software for sites or blogs, built with specific functions, e.g.: weather forecast, currency conversion, timer, calendar etc. Here follows the commonly used widgets in the context of a typical VHL portal to provide the organization of multiple elements in the site.

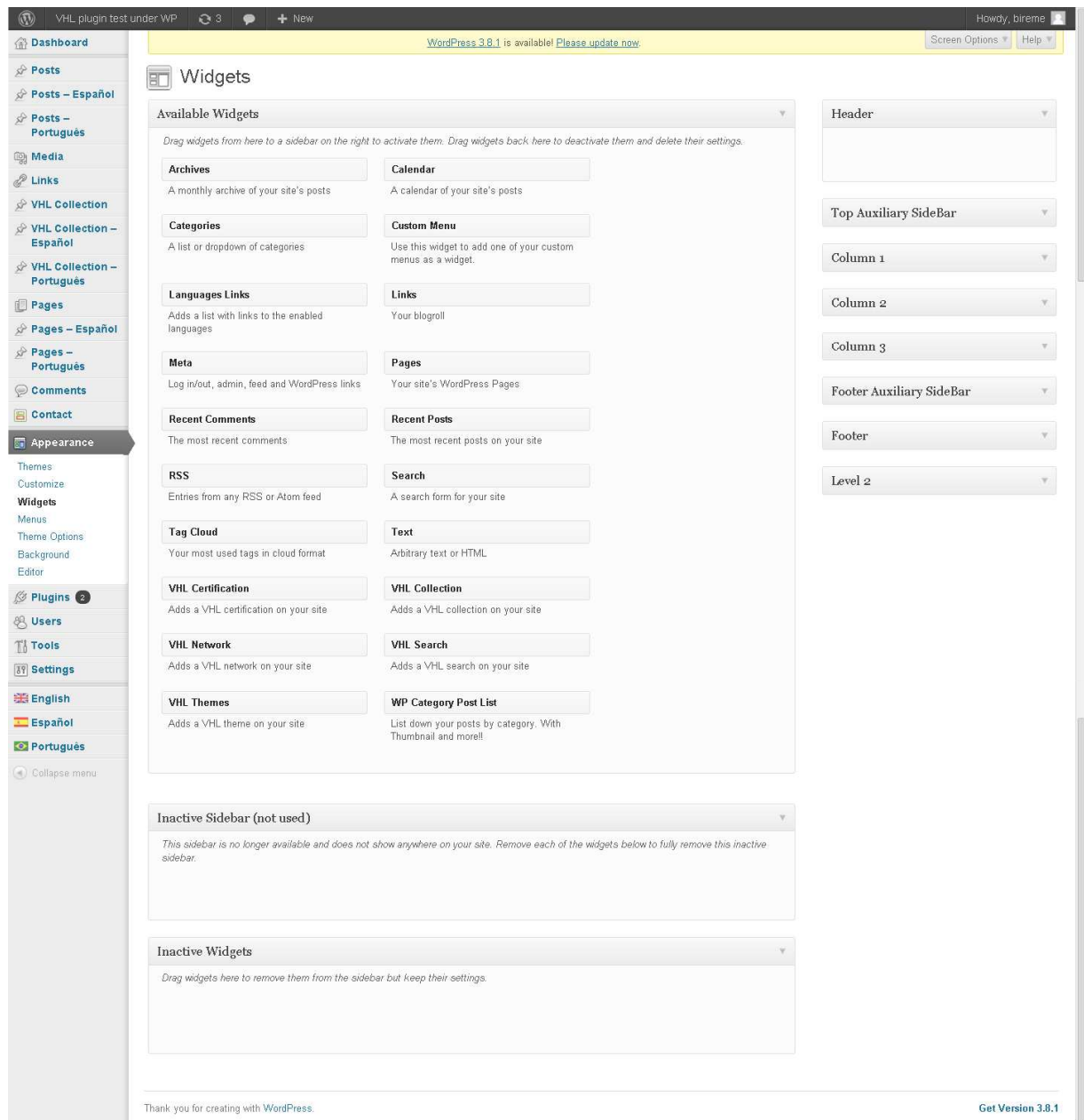


Illustration 75. Available widgets

Wordpress provides some standard widgets after VHL site plugin is installed. The most significant ones are:

- VHL Collection
- VHL Themes
- VHL Search
- VHL Certification
- RSS (*)

- Text (*)
- Links (*)

(*) Wordpress native widgets

By using these widgets the public interface of a VHL can be presented with:

- a header, with a banner and a name that identifies the VHL;
- a three-column content body organized with specialized widgets;
- a footer with the VHL coordinator institution data;
- IAHx integrated search (**);
- graphic customization.

(**) depends on processing data collected remotely by using ISIS OAI-Provider installed on the information source data server.

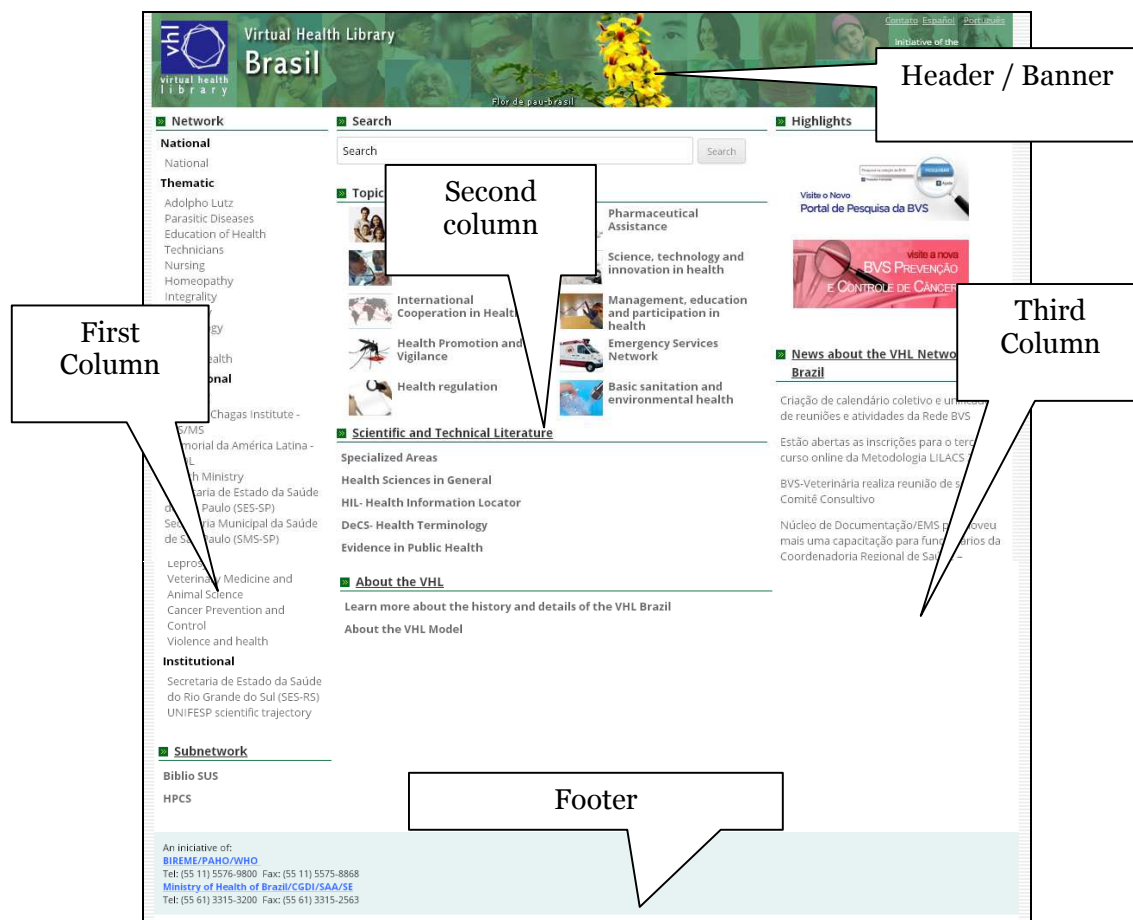


Illustration 76. Organization of VHL portal contents in a public interface

Follows the specifics for each component of a typical VHL site.

Column 1

This column present the objectives, the institution networks and the related portals of a specific VHL. To accomplish this, *text* and *link widgets* are used.

E.g.: the Text widget is used display a brief description of the VHL at the top of the first column.

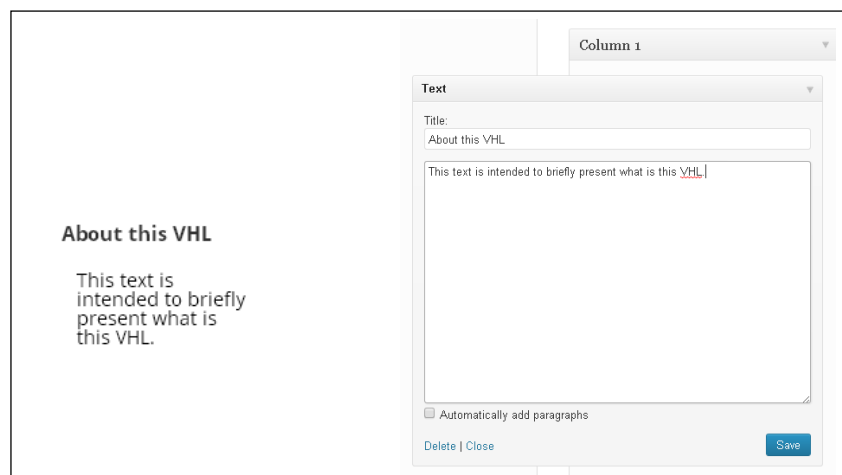


Illustration 77. About the VHL - Text widget

The Links widget is used here to display a list of partner institutions and VHLs.

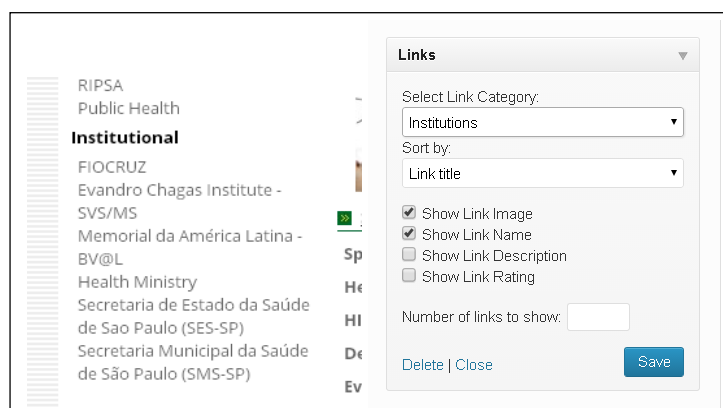


Illustration 78. Institutions - Links widget

NOTE: To use Links it is required to enable it through the administration interface.

Column 2

This column concentrates all information source contents and one can commonly use three different widgets: VHL Collection, VHL Search and VHL Themes.

The first widget in this column is the VHL Search that inserts IAHx search engine box. Below follows a typical VHL using the widget.

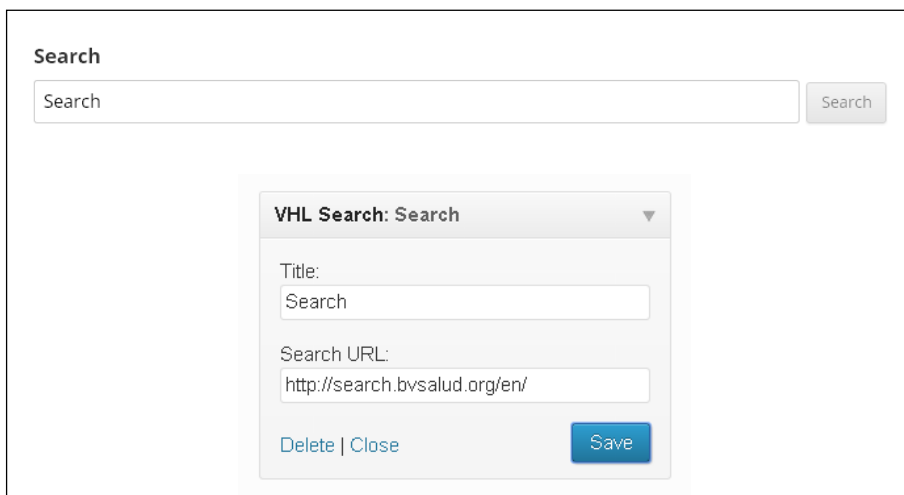


Illustration 79. Searching the VHL - VHL search widget

The second one is the VHL Themes. It is optional and allows the creation of themes which perform a specialized search by using a *state-of-the-art* strategy. (***)

(***) Both VHL search and VHL Themes assume referential data has been processed by BIREME and is integrated in its IAHx interface.



Illustration 80. Themes

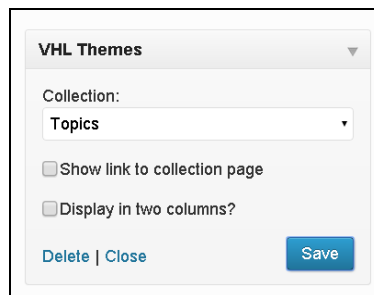


Illustration 81. VHL Themes Widget

In order to organize all information sources - including Directories and About the VHL - the VHL Collection widget is used. Below follows a VHL Brasil¹ sample.

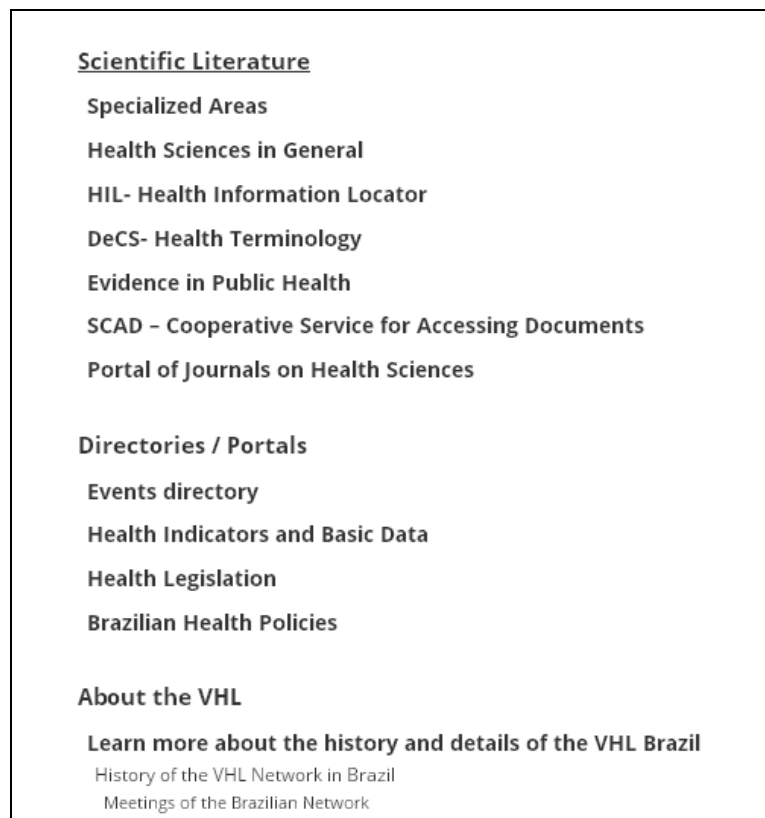


Illustration 82. Information sources

¹ It displays only the hierarchical structure provided that no graphic design and/or stylesheet has been defined.

The image displays three VHL Collection Widgets, each with a title, collection name, and configuration options. The first widget is for 'Scientific Literature', the second for 'Directories / Portals', and the third for 'About the VHL'. Each widget includes a 'Title' field, a 'Collection' dropdown, a 'Show link to collection page' checkbox, a 'Number of levels to display' field, and a 'Number of columns' dropdown. The 'Scientific Literature' and 'Directories / Portals' widgets have 'Delete | Close' and 'Save' buttons, while the 'About the VHL' widget has 'Delete | Close' and 'Save' buttons.

VHL Collection: Scientific Literature
Title: Scientific Literature
Collection: Scientific and Technical Literature
☒ Show link to collection page
Number of levels to display:
Number of columns: 1
Delete | Close Save

VHL Collection: Directories / Portals
Title: Directories / Portals
Collection: Directories and Portals
☐ Show link to collection page
Number of levels to display:
Number of columns: 1
Delete | Close Save

VHL Collection: About the VHL
Title: About the VHL
Collection: About VHL
☐ Show link to collection page
Number of levels to display:
Number of columns: 1
Delete | Close Save

Illustration 83. VHL Collection Widgets

Column 3

This column presents highlights, news, forthcoming events and warnings related to the technical status of the VHL. *Links*, *RSS* and *Text* widgets are used.

Links widget is used to present the highlights.

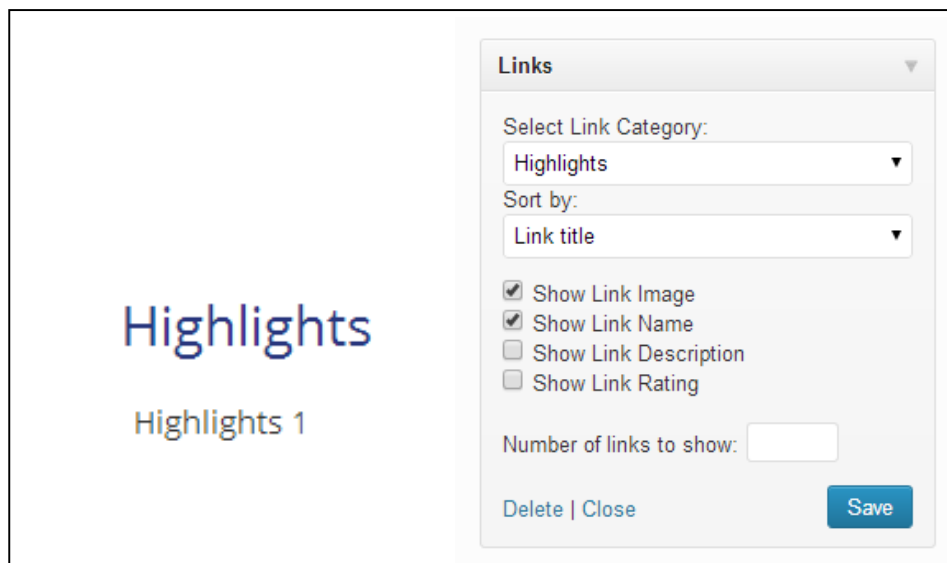


Illustration 84. Highlights – Links widget

RSS widget is used to present forthcoming events using a *feed* from Events Directory.

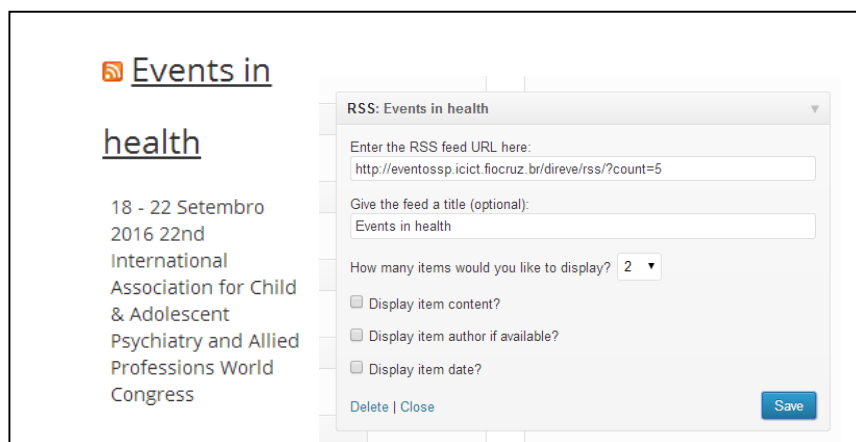


Illustration 85. Forthcoming events – RSS widget

Using the **Text** widget to display messages and warnings to users related to technical status, period of suspended service due to technical maintenance etc.

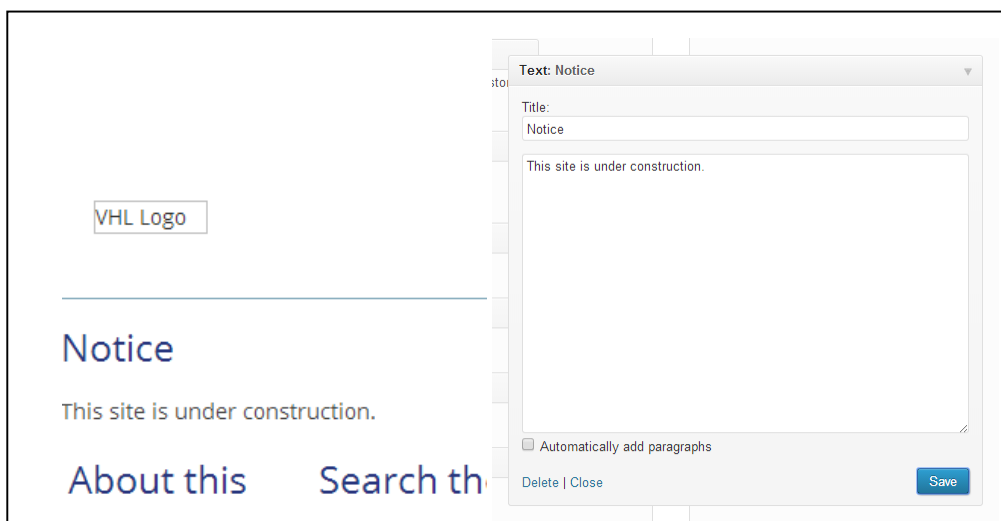


Illustration 86. Warnings – Text widget

Footer

At the footer is presented the VHL coordinator institution data such as full name and full address and the Text widget is more suitable for the task.



Illustration 87. Responsible institution

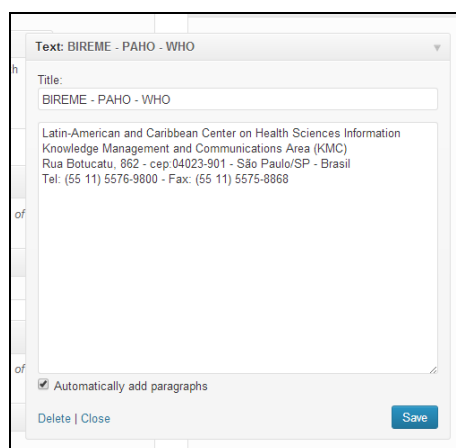


Illustration 88. Responsible institution – Text widget

Moving Widgets

For each column it is possible to add or delete a widget, according to the contents available in the portal. To do that just click and drag the widget to the desired column.

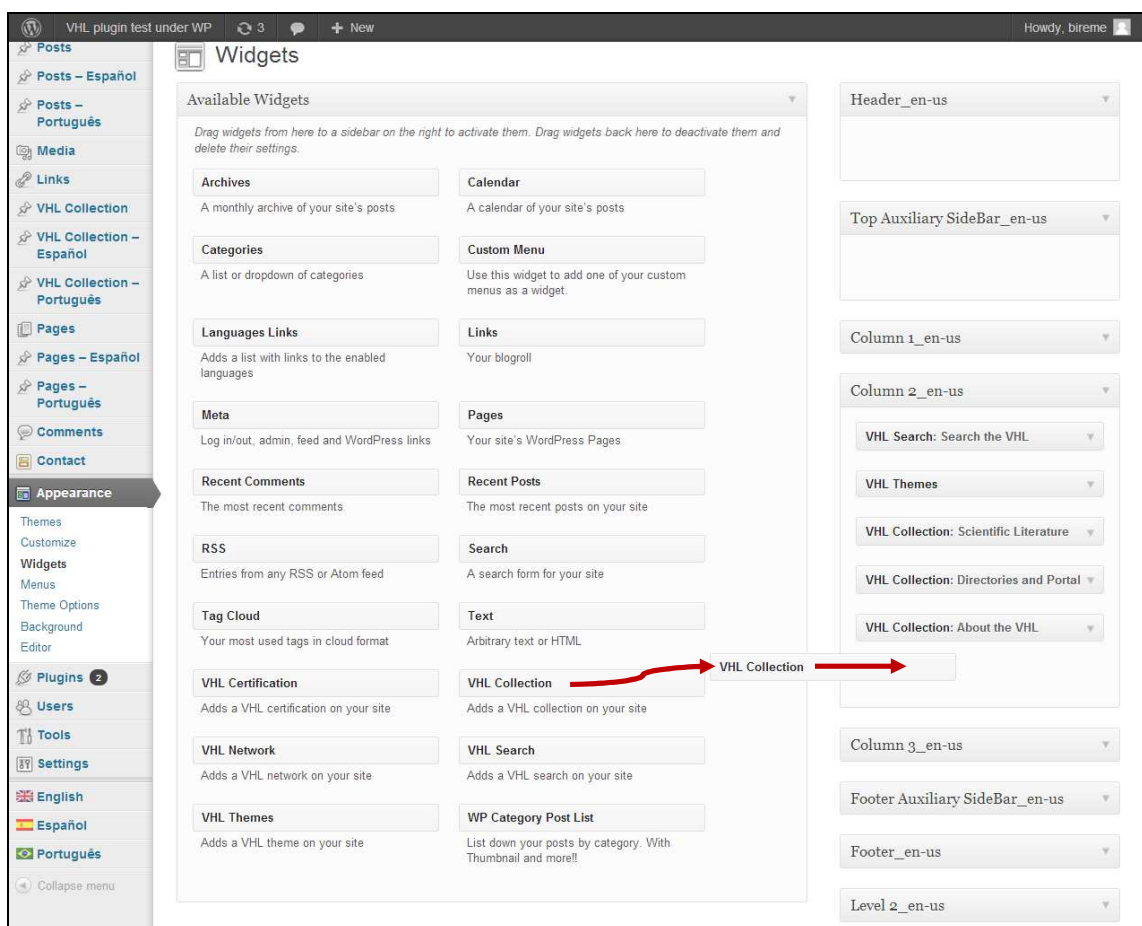


Illustration 89. Inserting a widget in column 2

To delete a widget from a column just click and drag it out of the column to the Available widgets box.

In case one wants to preserve the configuration of a specific widget it is possible to drag it to the Inactiv widgets box at the bottom of the page. There the widget remains with its original configuration and parameters. This is useful when testing a new widget for substitution.

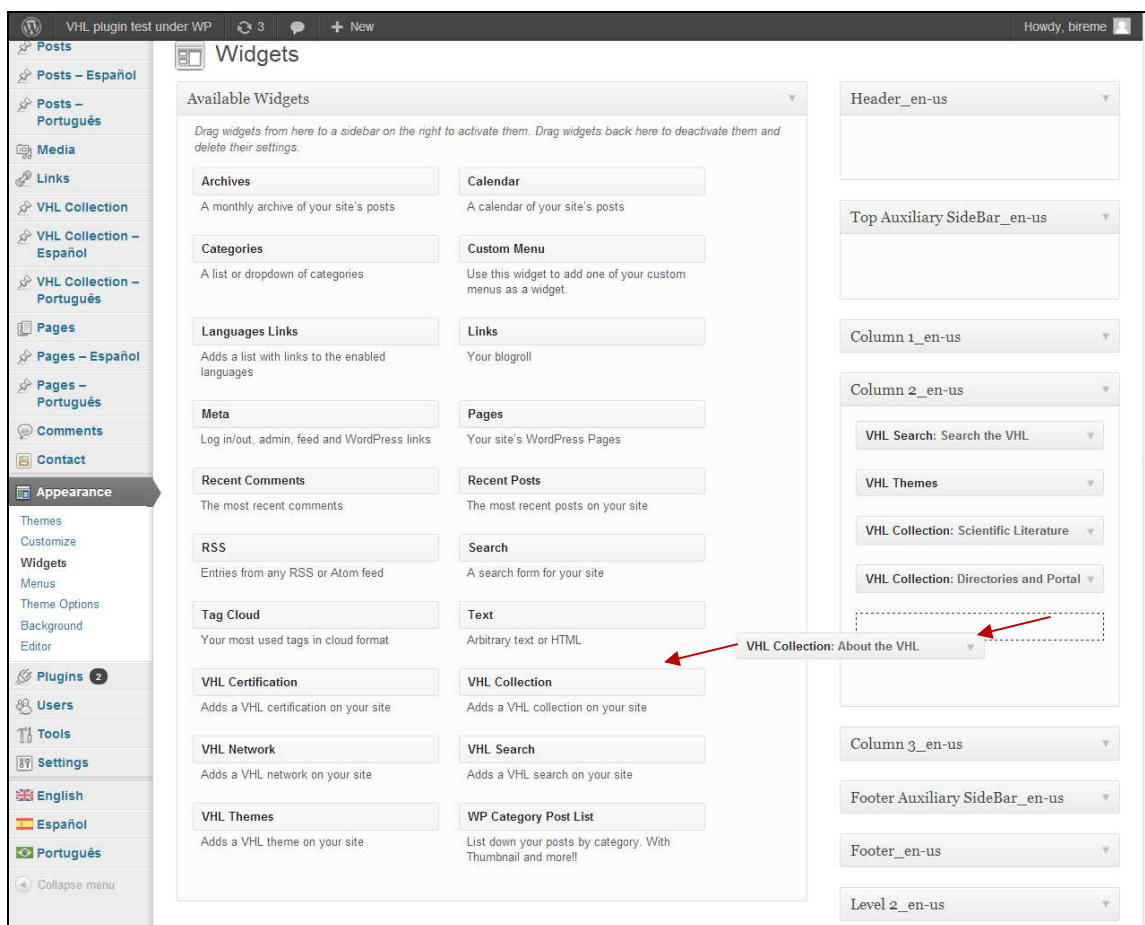


Illustration 90. Deleting a widget from column 2

Theme options

This section is intended to help user in configuring the appearance of a VHL portal without having to code a CSS.

There are three tabs available to help customizing the interface: layout, colors and header.

Layout

This tab allows for defining a background image, the amount of columns the portal is going to use and the width to each column, as well as to define if there is a header and a footer for the site.

The VHL model has by default the three column layout, being the first and third columns narrowed and the second being the widest once it concentrates all information sources.

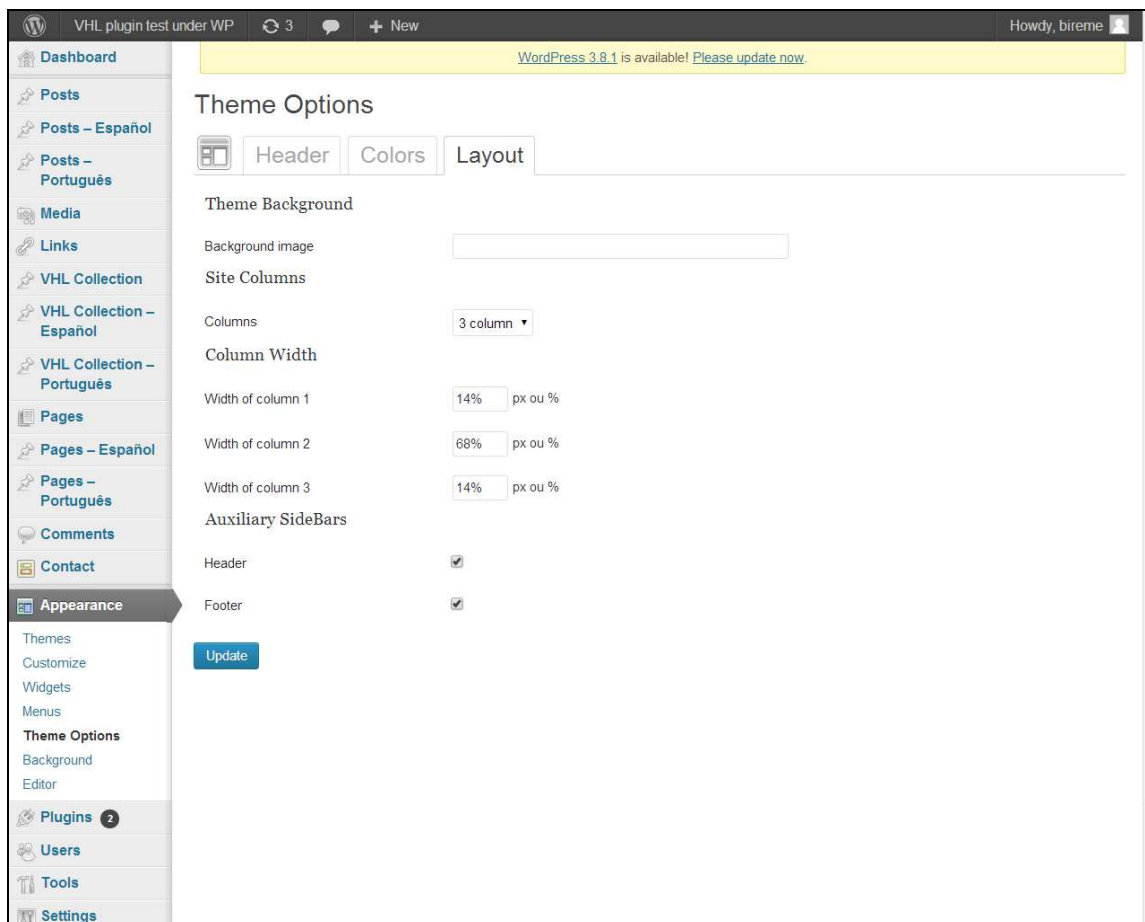


Illustration 91. Theme options - Layout tab

NOTE: For the width of the columns always consider 1 or 2% less than the desired widths. This is required to ensure there is a separation between columns. Therefore, when one divides the page in three columns being 15% for the first one, 70% for the second and 15% for the third, the acceptable values would be 14%, 68% and 14%, respectively.

Click the **Update** button to save changes and make current settings effective from now.

Colors

In this tab it is possible to change the colors of all available elements of the theme. It is possible to change it in general or by column.

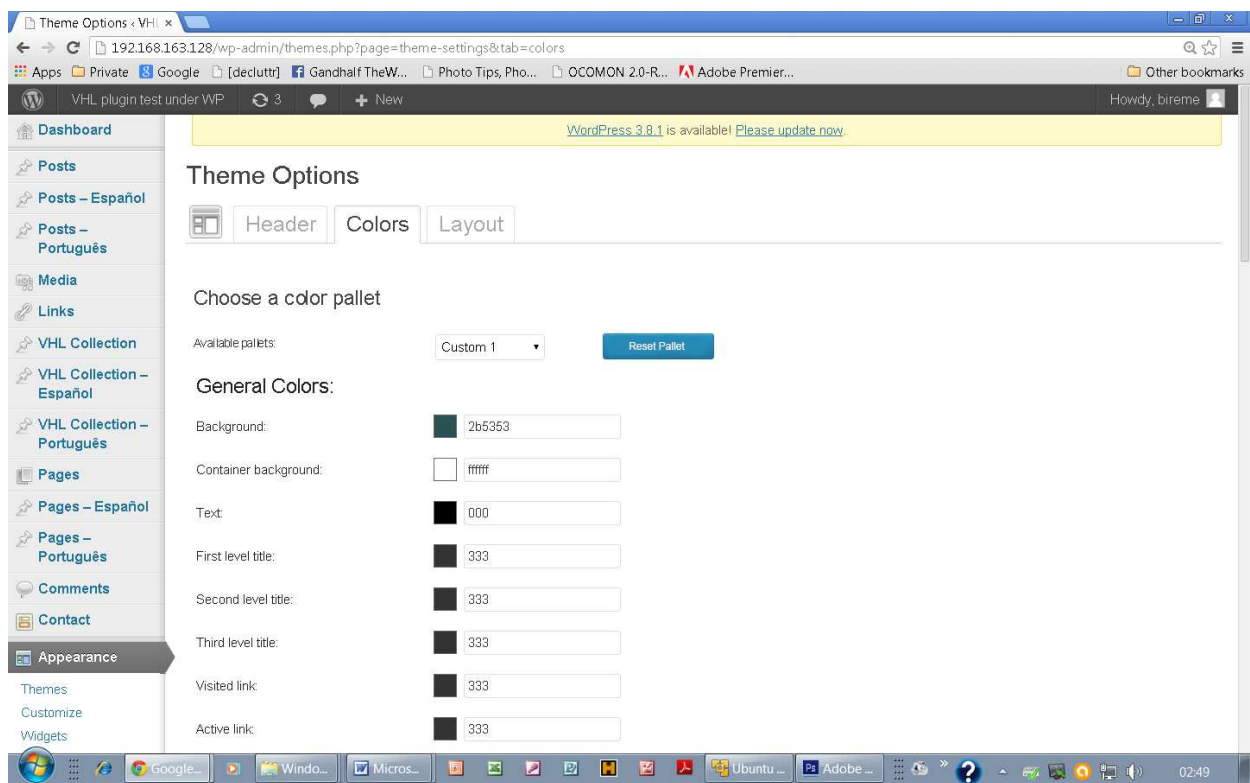


Illustration 92. Theme options - Colors tab

Bireme Default is the standard pallet and cannot be changed. To start customizing select **Custom 1** or **Custom 2** and change whatever needed.

When other pallet is enabled the system displays the **Reset Pallet** button to allow users recovering system's original configuration.

Click the **Update** button to save changes and make current settings effective from now.

Header

This tab makes possible to customize the logo and the banner of the VHL to the three standard languages of the VHL site plugin (English, Spanish and Portuguese).

Therefore, for each language it is possible to select a URL for the image and a link to point to when the user clicks the image.

It is also available the option to display or not the language bar and define its position on the page.

One can also define the Contact page and customized CSS and Javascript to be merged with the system interface.

Click the **Update** button to save changes and make current settings effective from now.

The screenshot displays the WordPress dashboard's 'Theme Options' page, specifically the 'Header' tab. The left sidebar contains navigation links for various site functions, with 'Appearance' and 'Theme Options' highlighted. The main content area is titled 'Theme Options' and includes sub-tabs for 'Header', 'Colors', and 'Layout'. The 'Header' tab is active, showing settings for the site's logo, banner, and language bar. The 'Logo' section has three rows for different languages (EN, ES, PT), each with a text input for the logo name, a text input for the image URL, and a text input for the link. The 'Banner' section also has three rows for different languages (EN, ES, PT), each with a text input for the banner name, a text input for the image URL, and a text input for the link. Below the banner section is a checkbox labeled 'Check to display title on banner'. The 'Languages bar' section has a checkbox labeled 'Check to display available languages' and a dropdown menu for 'Language bar position' set to 'Top'. The 'Contact page' section has a text input for the contact page URL. The 'Custom CSS and Javascript' section has a large text area for custom code. At the bottom left of the main content area is a blue 'Update' button.

Logo	Image URL	Link
EN	<input type="text" value="Paste the URL"/>	<input type="text" value="Paste the link"/>
ES	<input type="text" value="Paste the URL"/>	<input type="text" value="Paste the link"/>
PT	<input type="text" value="Paste the URL"/>	<input type="text" value="Paste the link"/>

Banner	Image URL	Link
EN	<input type="text" value="Paste the URL"/>	<input type="text" value="Paste the link"/>
ES	<input type="text" value="Paste the URL"/>	<input type="text" value="Paste the link"/>
PT	<input type="text" value="Paste the URL"/>	<input type="text" value="Paste the link"/>

☒ Check to display title on banner

Languages bar	Available languages	Language bar position
<input checked="" type="checkbox"/> Check to display available languages		Choose language bar position: Top

Contact page:

Custom CSS and Javascript:

Illustration 93. Theme options - Header tab

Highlights

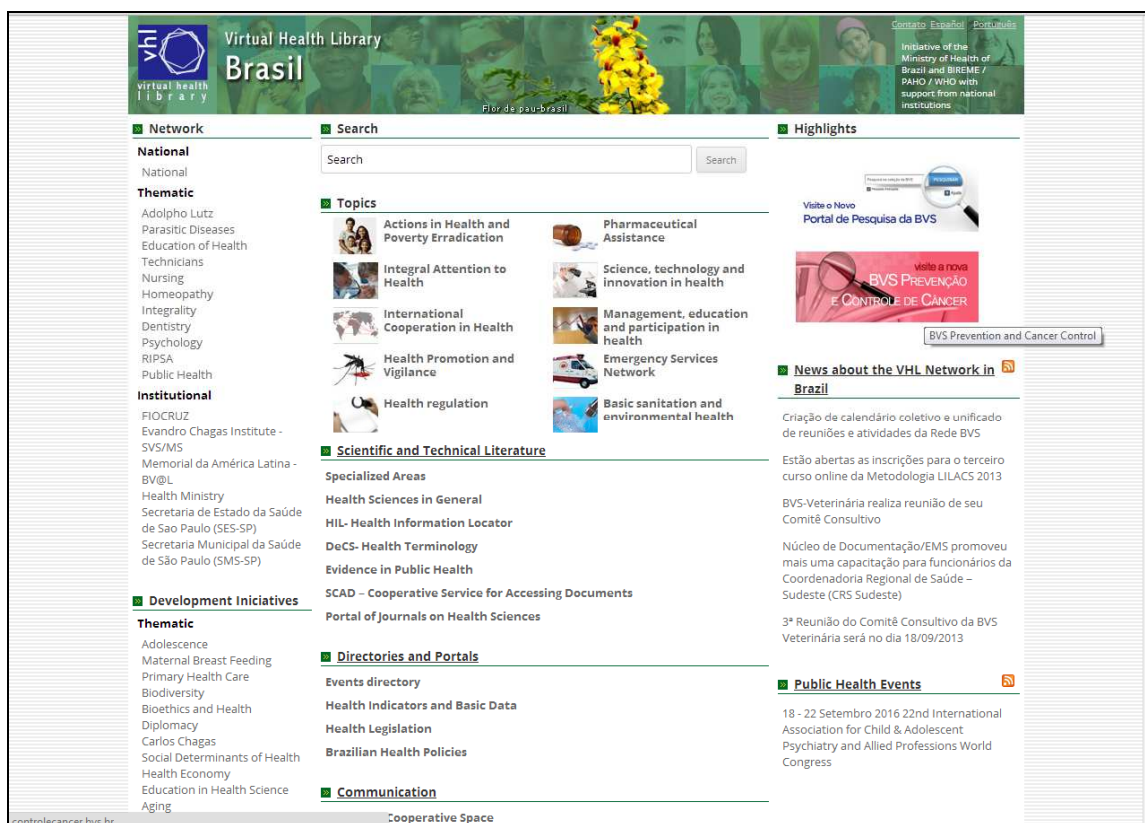


Illustration 94. Highlights

To add a new highlight to the third column of the portal:

- In Media upload a new image to the Media library as described in the chapter about Media. Then copy the image link.;
- In Links add a new item as described in the Links chapter, choose the category and insert the image link copied from the item above;
- Click the Add Link button.

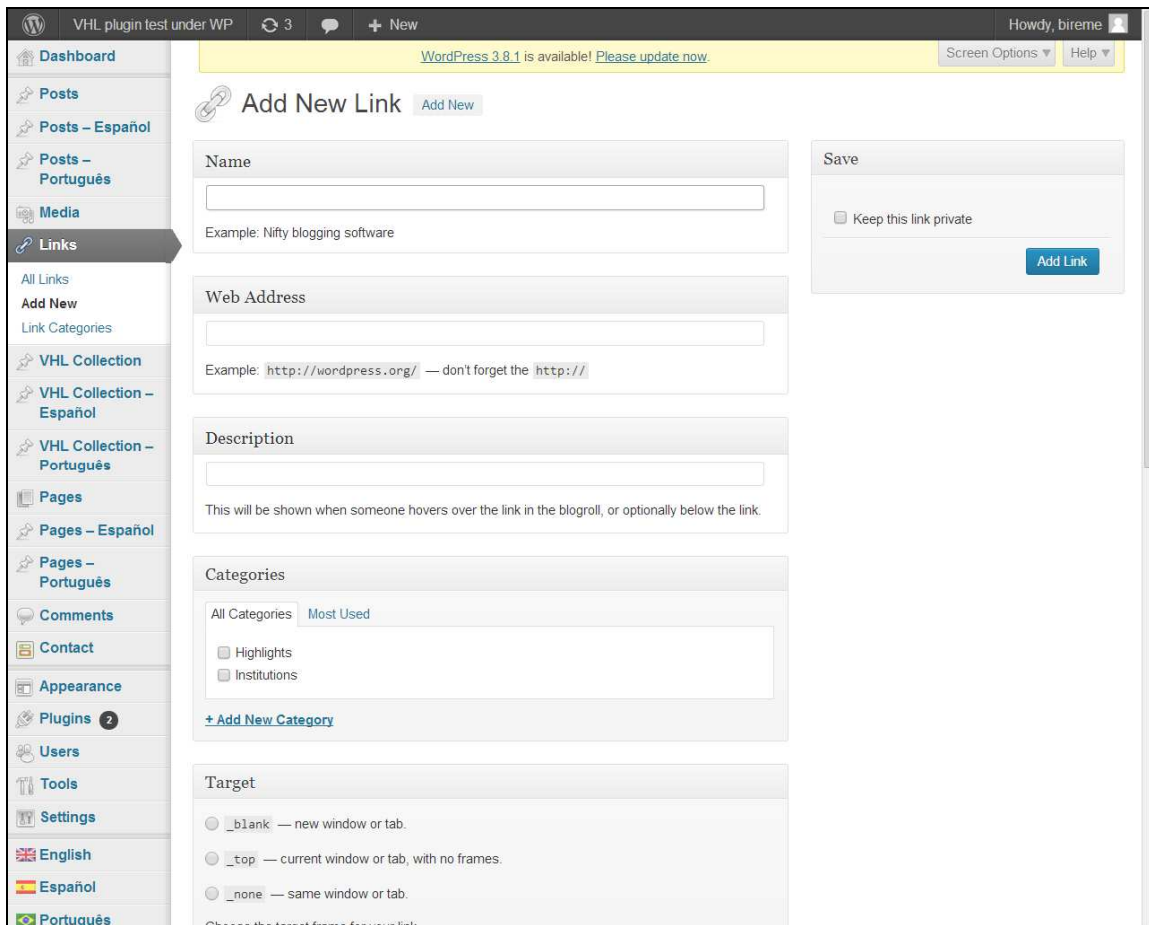
The screenshot shows the WordPress dashboard with the 'Add New Link' form open. The left sidebar contains the WordPress menu with 'Links' highlighted. The main content area has a title 'Add New Link' and an 'Add New' button. The form includes fields for 'Name' (with an example 'Nifty blogging software'), 'Web Address' (with an example 'http://wordpress.org/'), 'Description' (with a note about hover text), 'Categories' (with checkboxes for 'Highlights' and 'Institutions'), and 'Target' (with radio buttons for '_blank', '_top', and '_none'). A 'Save' box on the right contains a checkbox for 'Keep this link private' and an 'Add Link' button. The top of the dashboard shows the WordPress version '3.8.1' and a user profile 'Howdy, bireme'.

Illustration 95. Links Widget– Adding a new link

For further information please check chapter 8 - Links on how to use this feature along with link categories.

Users

By clicking **Users** one can view, add and edit all data related to the users of the current WordPress instance.

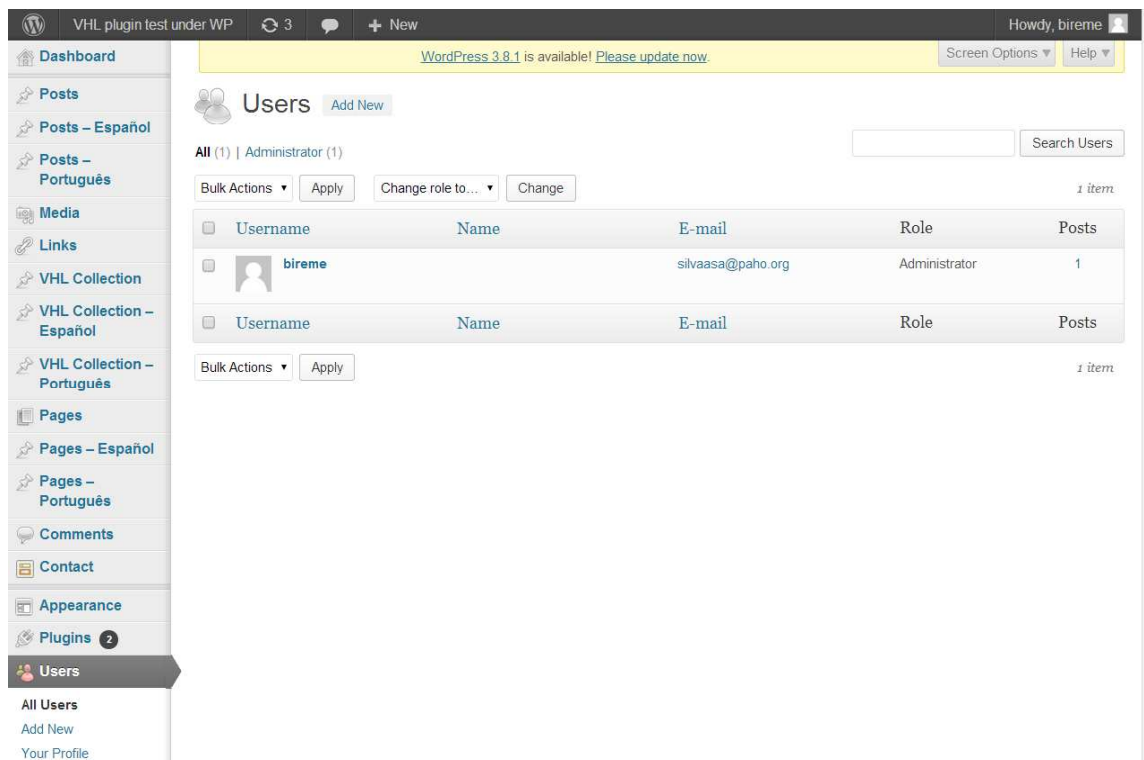


Illustration 96. Viewing users

To add a new user just click the **Add new** option and fill in the required fields and selecting the role desired to that user:

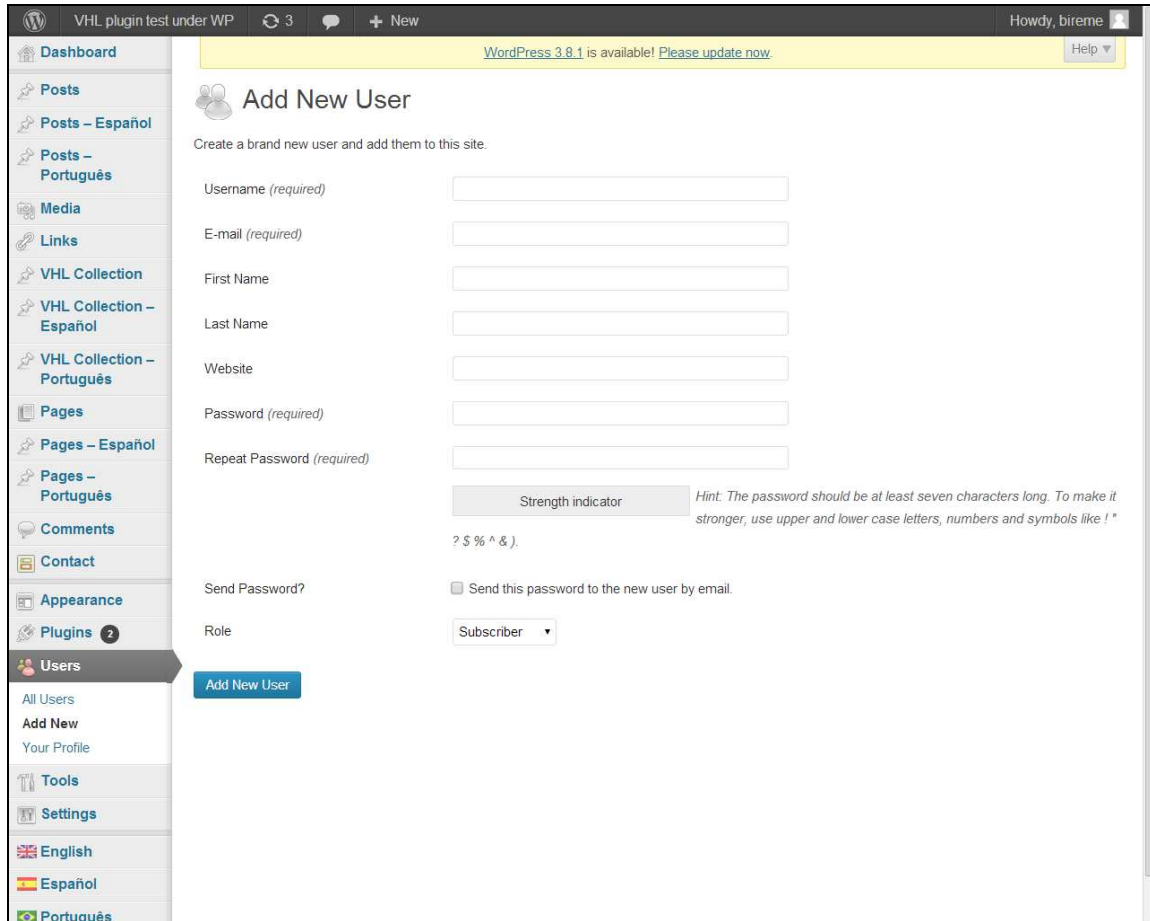
The image shows the WordPress administration interface for adding a new user. On the left is a sidebar menu with categories like Dashboard, Posts, Media, Links, VHL Collection, Pages, Comments, Contact, Appearance, Plugins, and Users. The 'Users' menu item is highlighted, showing sub-options: All Users, Add New, and Your Profile. The main content area is titled 'Add New User' and contains a form with the following fields: Username (required), E-mail (required), First Name, Last Name, Website, Password (required), and Repeat Password (required). Below the password fields is a 'Strength indicator' section with a hint: 'The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! *'. There is also a checkbox for 'Send Password?' and a 'Role' dropdown menu currently set to 'Subscriber'. A blue 'Add New User' button is located at the bottom left of the form area. The top of the page shows a navigation bar with 'VHL plugin test under WP', a refresh icon, a '3' icon, a '+ New' button, and a user profile 'Howdy, bireme'.

Illustration 97. Adding a new user

It is also possible to edit the information of the user accounts, as well as editing your own configuration, change password etc, by choosing **Your profile**.

VHL plugin test under WP
3
+ New
Howdy, bireme
WordPress 3.8.1 is available! [Please update now](#)
Help

Dashboard
Posts
Posts – Español
Posts – Português
Media
Links
VHL Collection
VHL Collection – Español
VHL Collection – Português
Pages
Pages – Español
Pages – Português
Comments
Contact
Appearance
Plugins 2
Users
All Users
Add New
Your Profile
Tools
Settings
English
Español
Portugués
Collapse menu

Profile

Personal Options

Visual Editor ☐ Disable the visual editor when writing

Admin Color Scheme
☐ Blue
☒ Gray

Keyboard Shortcuts ☐ Enable keyboard shortcuts for comment moderation. [More information](#)

Toolbar ☒ Show Toolbar when viewing site

Name

Username Username cannot be changed.

First Name

Last Name

Nickname (required)

Display name publicly as

Contact Info

E-mail (required)

Website

AIM

Yahoo IM

Jabber / Google Talk

About Yourself

Biographical Info

Share a little biographical information to fill out your profile. This may be shown publicly.

New Password If you would like to change the password type a new one. Otherwise leave this blank.

Repeat New Password Type your new password again.

Strength indicator
Hint: The password should be at least seven characters long. To make it stronger, use upper and lower case letters, numbers and symbols like ! * ? \$ % ^ & .

[Update Profile](#)

Thank you for creating with WordPress.

[Get Version 3.8.1](#)

Illustration 98. Editing user configuration

Network admin

When *WordPress* is installed with *multisite* option enabled the entire application starts managing some plugins and themes at the application level and not at site level. This happens from what is called **Network admin**. There are available options to manage site activities, global users (that are active in more than on site, themes, plugins and some configuration settings.

To access the **Network Admin** just select **My Sites** at the top of the page and choose **Dashboard**.

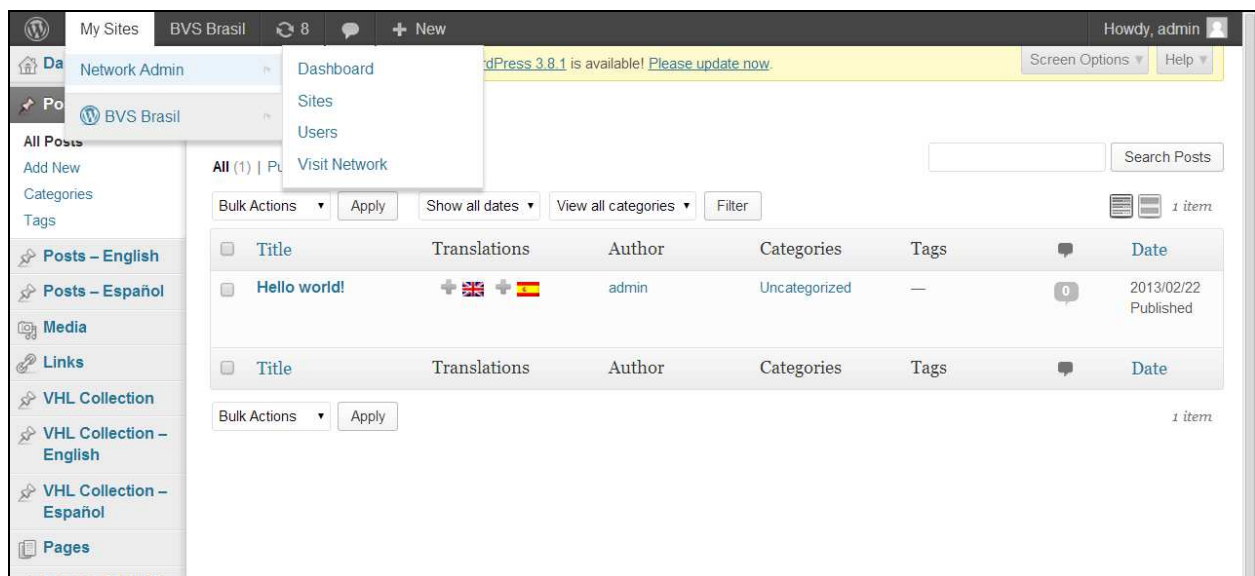


Illustration 99. Accessing the Network Admin

In the main page of the Dashboard there is a set of usefull information for those who administer the application with multiple web sites. It is possible, e.g., create a new global user, create a new site, search for user names and sites, be notified of application updates available, know what plugins are the most popular and what plugins have been updated recently etc.

NOTE: The *WordPress* engine automatically looks for application updates, as well as to plugins installed by the user, based on their current version. The application displays such information by default at the top of the windows below Wordpress header and in pale yellow.

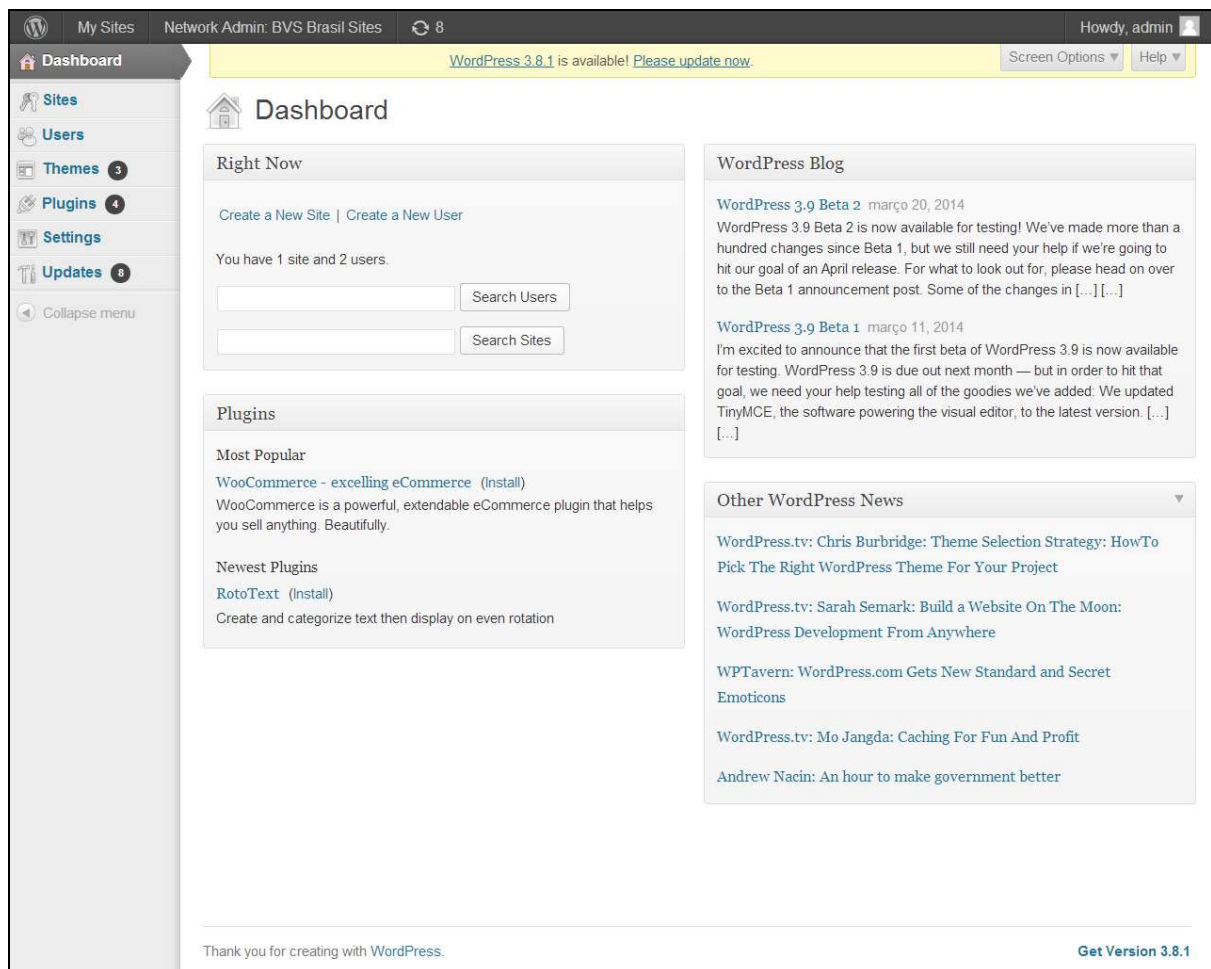


Illustration 100. Dashboard

In **Sites** option are listed all sites created in that Wordpress instance, along with last update info, site registration date and the users' list. The administrator can perform searches, create, visit, change and exclude existing sites or even access a specific site's dashboard.

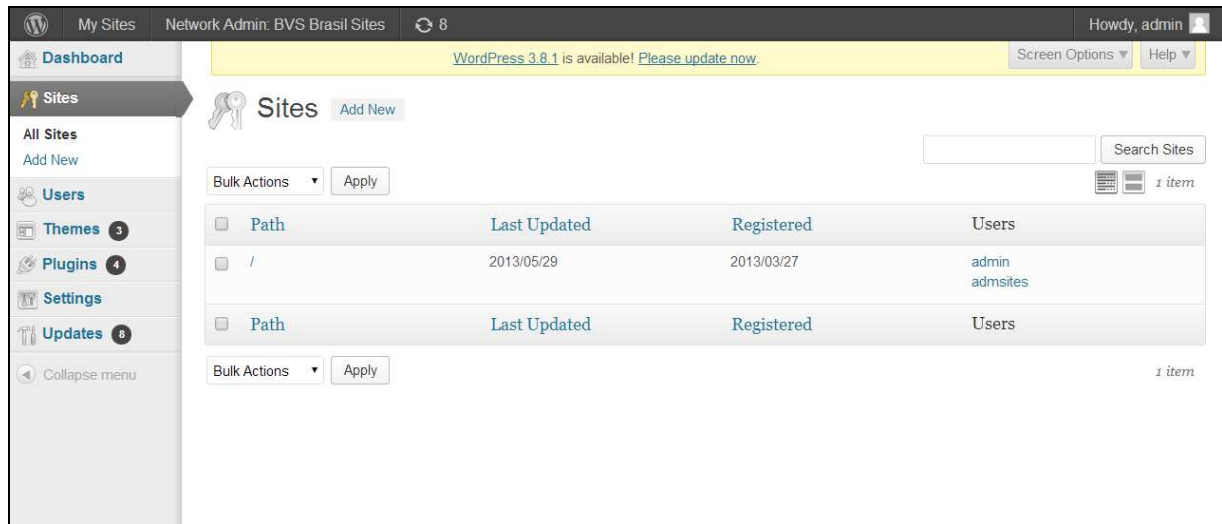


Illustration 101. Sites option

In **Users** the options are *Add new*, *Edit* and *Delete*, except for the *Admin* user that cannot be either excluded nor change its role.

The user list has the following fields: **Username**, **Name**, **E-mail**, **Registered** and **Sites** where the user is able to logon.

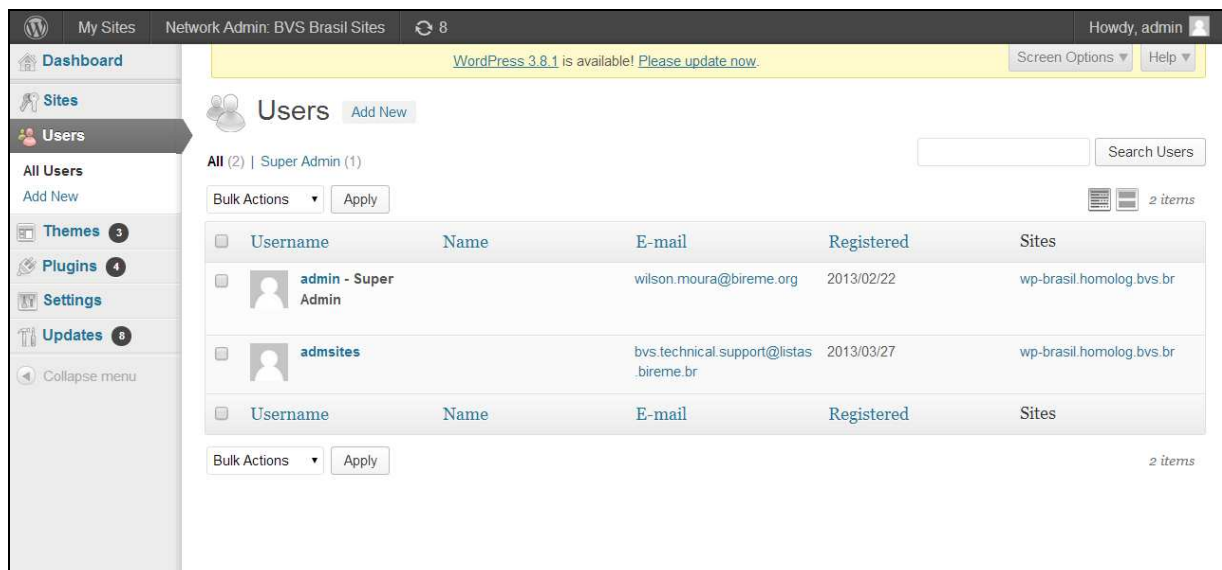


Illustration 102. Option Users

In **Themes** are listed all visual themes available for selection in the current version of *WordPress*. Each theme has its name associated to the **Version** information, **Description**, **Search** and also the options

Activate / Deactivate to make it default at the global level. In red is shown information under **Available updates** for all themes that had been updated, having a link to visit the theme site.

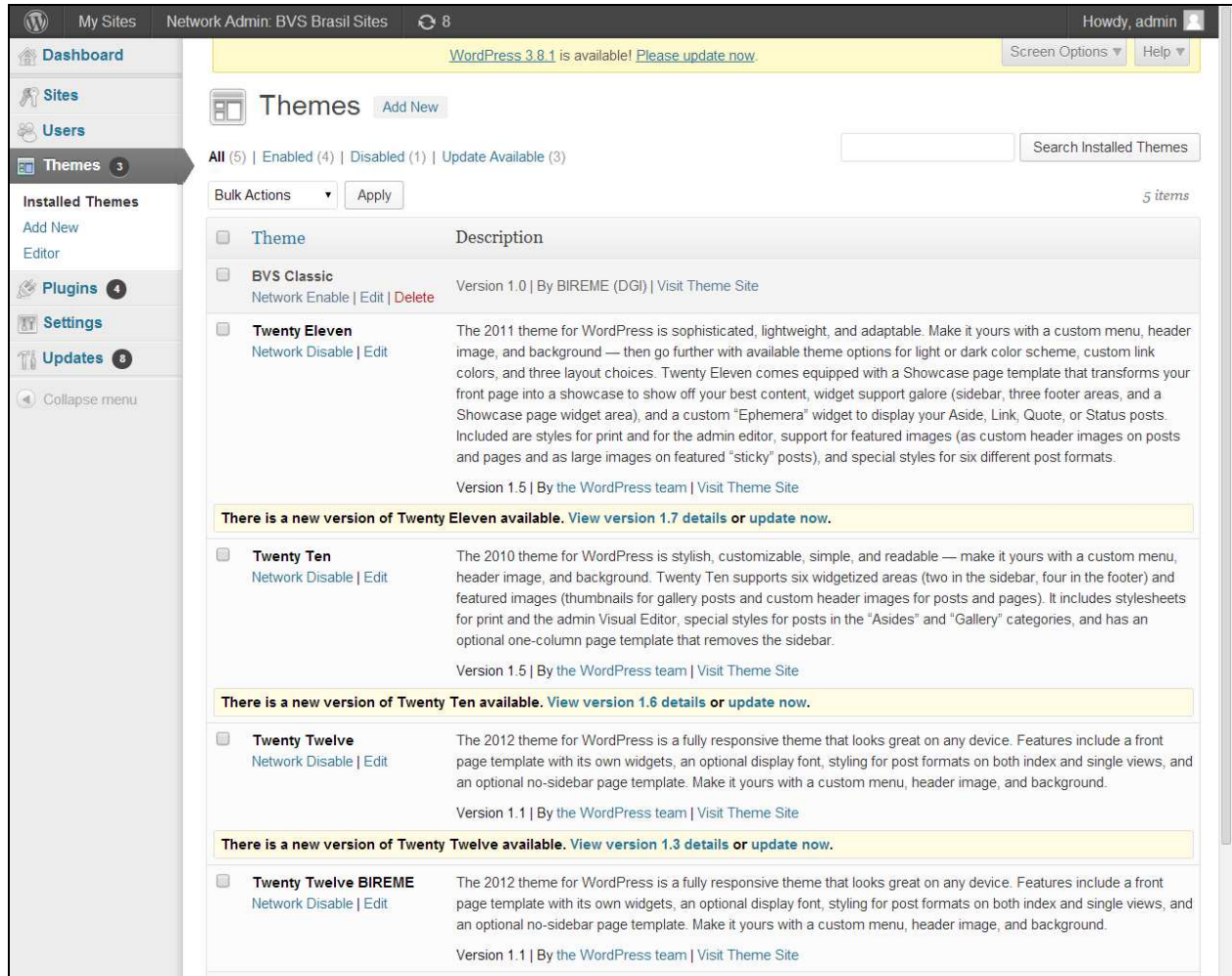


Illustration 103. Option Themes

As in Themes, the option **Plugins** allows for **Ativate** and **Deactivate** on a global basis all installed *plugins*. One can also add, exclude and visit the plugin site or update it through the interface.

All *WordPress* installed in multisite mode must have the **VHL Plugin** activated through the network dashboard in order the subsites can inherit the specific capabilities of the plugin.

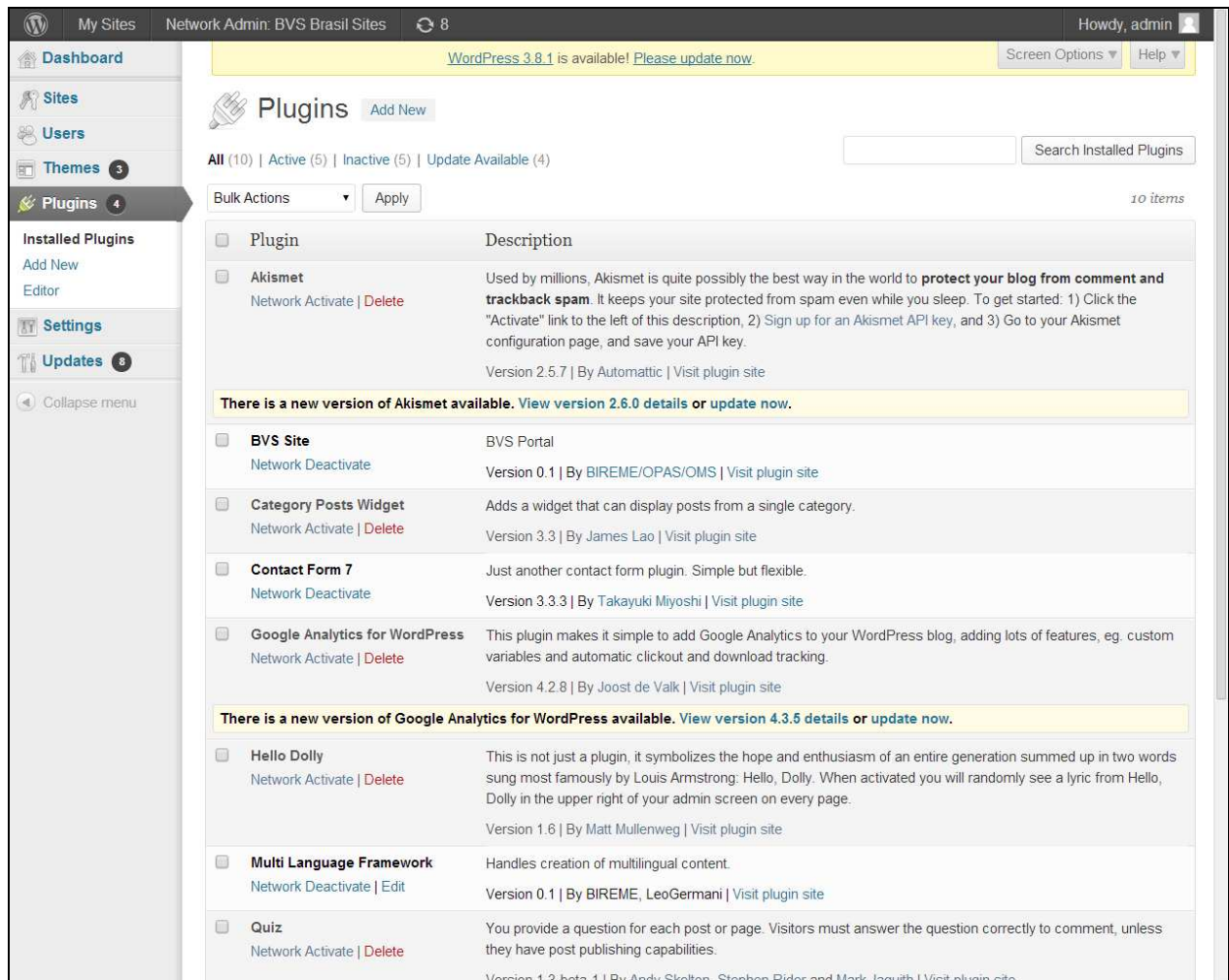


Illustration 104. Opção Plugins

In the Network **Settings**, *WordPress* administrator can set various access modes, allow and/or forbid users' actions, define limits and tags for the application as a whole. Settings are separated into 6 sections:

- Operational settings
- Registration settings
- New site settings
- Upload settings
- Language settings
- Menu settings

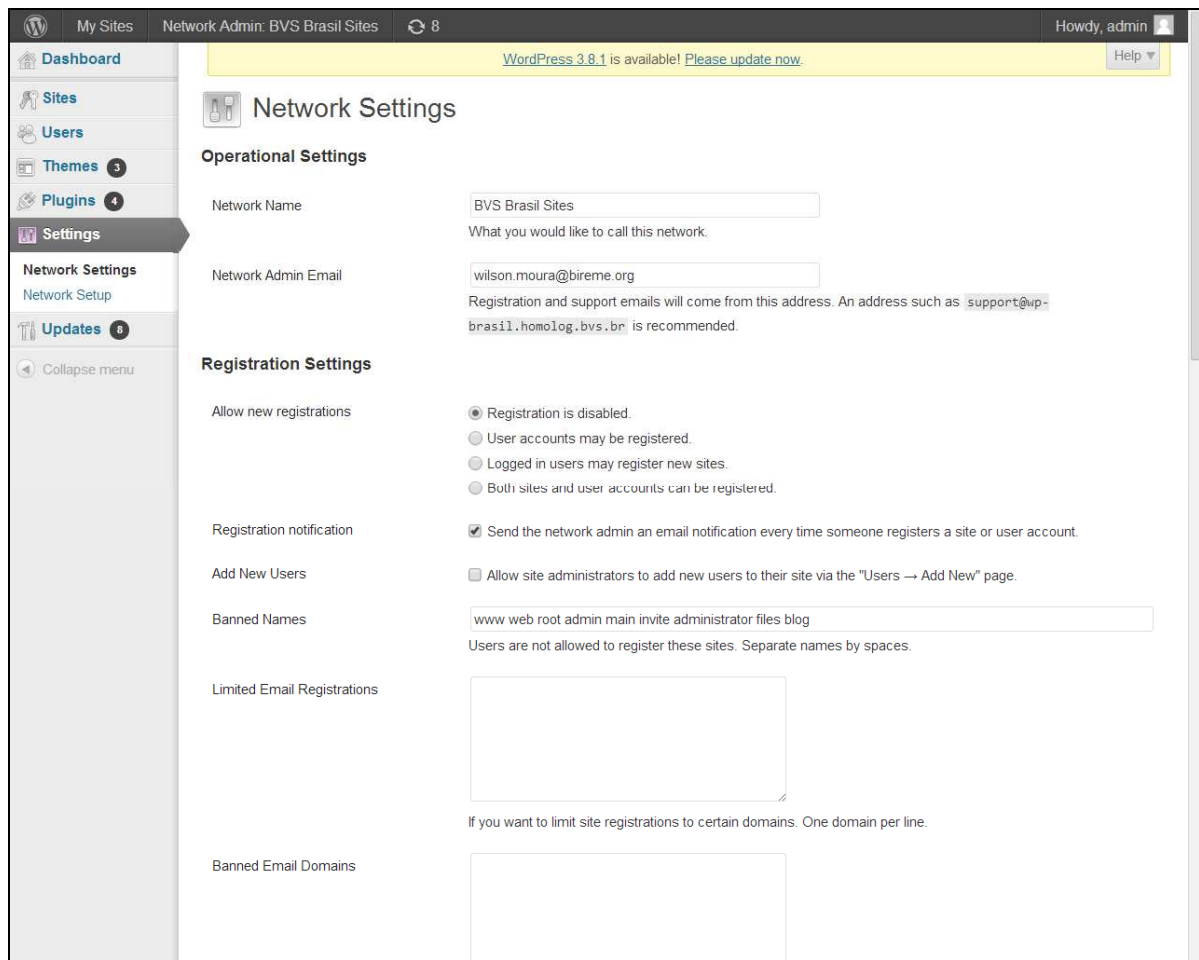


Illustration 105. Options in Settings

There is also the Wordpress updates that concentrates all version updates either for WordPress or the plugins and themes,

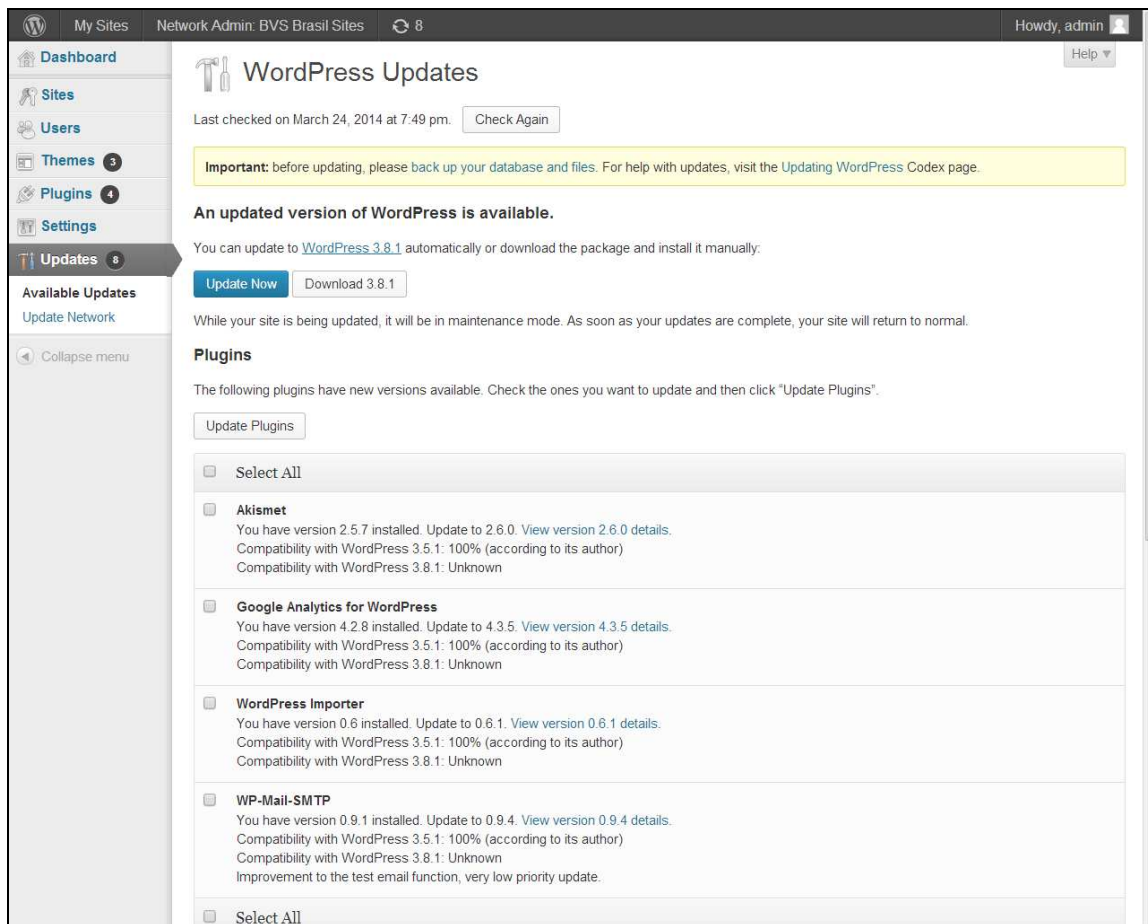


Illustration 106. Option WordPress updates

Note: To make possible updating the applications and plugins installed, make sure the user has rights to write to the application directory from the web and that the server has the sftp service available for using.

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- Declaración de Puebla. In VI Congreso Regional de Información en Ciencias de la Salud (CRICS VI) - III Reunión de Coordinación Regional de la BVS. Puebla, México : BIREME - OPS - OMS; 05-09 de maio de 2003. Disponible en <http://crics6.bvsalud.org/crics6/es/declaracion.htm>.