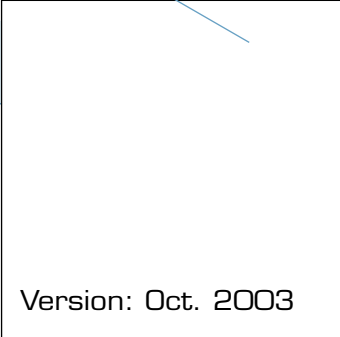


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# pAdmin Manual

For the platforms of the factline Community Server

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Version: Oct. 2003

## Welcome to the Training for Platform-Administrators of the factline Community Servers

The aim of this training manual is to describe to you the tasks of the platform administrator („pAdmin“) and to also describe the individual steps of his/her duties. All steps are explained by using the basic screenshots. You will find numerous tips and tricks for initially setting up and then later improving your platform.

In the gray text boxes you will find additional information and examples.



Information...



Examples....

Further services factline offers you, are:

- Support solutions (during the initial phase we will also cover the pAdmin functions)
- Advice as to how a platform can be structured and how a community can be built

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**Introduction:** - The functions of the System-Administrator ("sAdmin"):

## **Introduction: Division of Roles between the Platform-Administrator, System-Administrator and User**

---

In the beginning phase of the construction of an FCS-Platform, the Platform Administrator will be henceforth referred to as „pAdmin“. Before we go any further with the individual functions and options, it is important to take a moment to distinguish between the roles of the System-Administrator („sAdmin“), Platform-Administrator („pAdmin“), and the User („User“):

Platform-Administrators are between the System-Administrator and the user in the hierarchy of the system. In a figurative sense, FCS's functional hierarchy can be clarified using an analogy of the construction and use of a house:

- The purchaser (designer) announces how the house (in our case, the platform) should appear.
- The system administrator (builder) transfers a ready-made, turnkey house (platform) to one or more platform administrators (new owners).
- The platform administrator sets the house rules, divides the users into groups, sets the password for each user, and can also structure the arrangement of the house, (the platform arrangement).
- A few users move throughout the house, inhabit the house, help with its arrangement, expand or change it, etc.

### **1. The functions of the System-Administrator ("sAdmin"):**

In case the FCS is leased per month (ASP-Model), the role of the sAdmin is taken from factline. When the FCS is purchased and installed on a customer server, the customer himself is the sAdmin. The first task of the sAdmin is setting up the platform. This includes:

- Naming the platform (as it appears in the header): „Eurone&t Learning Policies “
- Domain name: For example, : <http://learningpolicies.themenplattform.com> (Sub-domain from factline) or [www.learningpolicies.net](http://www.learningpolicies.net) (Linking to an actual domain of the customer).
- Appointing a Platform-Administrator
- Connecting the desired services (facts, news, chat...)



**Forms of use: ASP and self- installation are possible.**

FCS offered as ASP solution: The server remains located at factline, furthermore, the functions of the system-administrators are taken over by factline. The system can also be installed on the server of the customer over an Intranet or the Internet; in this case the customer is the system administrator.

**Introduction:** - The functions of the Platform Administrator ("pAdmin"):

## 2. The functions of the Platform Administrator ("pAdmin"):

After the installation of the platform by the sAdmin, it is the pAdmin's turn to begin work. At this point, no one can place contents on the platform, not even the pAdmin. The pAdmin first determines, as already mentioned, the „rules of the house“ (which groups there are and who is permitted to read/write what) and distributes the keys to the users (arranges users into different groups). After that the pAdmin prearranges the organization of the house (= the contents), by defining types or creating folders accessible to certain groups. The function of the pAdmin is described in detail in the following part of the training.



### **Registration of the pAdmin:**

Everyone that will become a platform administrator must first register as a normal user, so that the sAdmin of the initialized platform can designate that person as a pAdmin. It is enough if this person has registered themselves on any platform (for example, on the test platform for users of FCS, <http://test.kundenplattform.com>).

## 3. The possibilities for the user of the Platform ("User")

Users have different rights, as the case may be, according to which user group(s) they are assigned to and which permissions these groups are granted. In principal, a user can only see those services and contents for which he/she has been given permissions.

A user can:

- Register
- Change his/her settings (user data such as address, telephone number, photo...)
- Order information ("notifications") concerning changes to texts
- Retrieve contents (the authorization system controls who sees what)
- Enter contents (if the services "images" and "downloads" are activated, they can also upload pictures and externally-created data files)
- Link/Associate contents with each other ("link")
- Change contents (Permission settings control who is permitted to edit)
- Hide contents (Permission settings control who can delete what)
- Set permissions for new or altered contents



### **Permissions System:**

The user sees which groups the pAdmin has added and can select which groups he/she would like to grant read/write permissions to. This person cannot, however, add his/her own groups.

- Come into contact with other users (ping, chat...), if these services are set to available.

## Part I: Function and Interface of the pAdmin

---

### 4. 1. Function of the pAdmin

After the sAdmin has organized the platform according to the customer's specifications and linked it with the desired Internet domain (<http://meineplattform.themenplattform.com>, etc.), he/she turns over the platform to the platform administrator.

**Important:** At this point, no one can place contents on the platform, not even the pAdmin, because no permissions have been assigned yet. Users can only register themselves and change their settings.

In this beginning phase, the duties of the platform administrator are:

- To set up groups (for example: customers, project groups, internal administration...)
- To assign registered users to these groups
- To grant certain permissions to these groups: Which groups should have access to certain services, which group(s) should be assigned to the highest levels of file/text authorization? Which groups should be given standard permissions for reading and/or altering texts?
- To structure the contents of the platform (Define types, set up folders on the highest level („top level“) in Structure, etc.)
- Create a start page
- To work on e-mail templates: (Enter text for the registration e-mail and the notification e-mail)



**If desired, factline can also support you in the beginning phase as a pAdmin.**

factline can take over the platform administrator's function for you. In addition, we would gladly advise you as to how your platform can be structured logically.

As soon as the beginning phase is completed, the user can add texts, retrieve contents, come into contact with other users (ping, chat...), etc., if they have been granted permission to do so.

In order to further maintain the platform, the platform administrator must:

- Manage users and user groups (handle the assignment of newly-registered users to groups, hide groups which are currently not needed, etc.)
- Analyze statistics (disk usage, frequency of searches for certain services/documents, etc.)
- Edit the home page, when necessary

**Optional:** You can activate additional services at any time. Note that to do this, you must once again assign permissions and if necessary, create the appropriate types.

## 5. Entrance to the pAdmin interface

The pAdmin has its own interface for implementing any necessary actions/services. A prerequisite for this is an Internet connection and a standard browser (Internet Explorer or Netscape Navigator, version 4 or above).

| 1 | Enter the URL **http://padmin.factline.com** into the URL address bar of your browser:

| 2 |

<p><b>Platform Administrator</b> Please login:</p> <p>Username: <input type="text"/></p> <p>Password: <input type="password"/></p> <p><input type="button" value="Login"/></p>	<p>Enter your user name and password here, and then click „Login“.</p>
--	--

Figure 1: Login pAdmin

| 3 |

<p><b>Select platform to edit</b>   <a href="#">logout</a></p> <p><input type="text" value="-----"/></p> <p><input type="button" value="next"/></p>	<p>Select the desired platform from the pull-down menu and click „next“.</p> <p>(Figure 2,</p>
---	--

Figure 2: (Platform-Select)

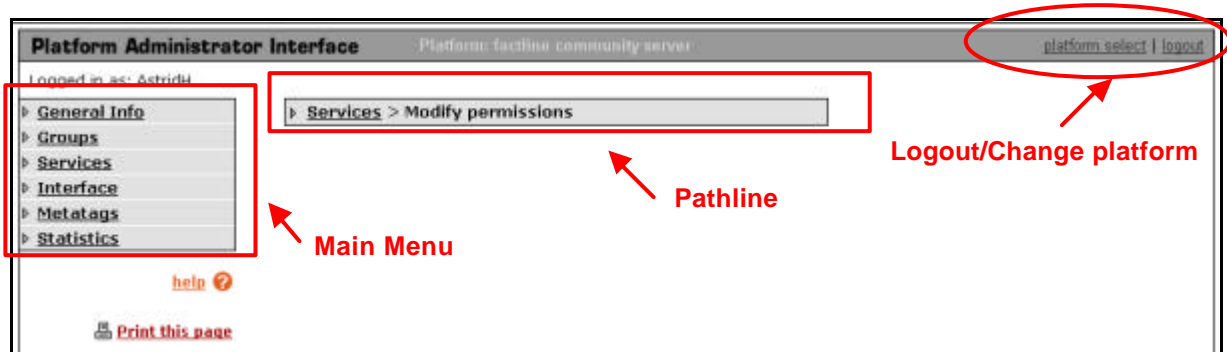
| 4 | Now the main page of the pAdmin interface for this platform opens, with some general information about it.

The screenshot shows the 'Platform Administrator Interface' for the 'factline community server'. The user is logged in as 'AstridH'. The interface includes a navigation menu on the left with options like 'General Info', 'Groups', 'Services', 'Interface', 'Metatags', and 'Statistics'. The main content area displays 'Information about factline community server' with the following details:

- General platform information:**
  - Platform title: factline community server
  - Creation date: 14 Mar 2001
  - Main group ID: 8472
  - Platform admins: Hella(8261), maxhern(3110), sebastian(8264), ignis(8231), maxx76(8222), AstridH(9316), mhuber(9487), miltner(15414)
  - Access read: universe(1)
  - Access write:
- Statistical information:**
  - Total number of facts: 2571
  - Latest change date: 15 Oct 2003
  - Number of system groups: 3
  - Number of platform specific groups: 4
- Groups:**
  - fcs\_admin - für den inhalt verantwortliche dd
  - developnarc - Entwickler (factline)td

## 6. The Interface of the pAdmin

### 6.1. Navigation



There are three navigation possibilities, as follows:

- **Main Menu:** Here you see the groups of actions that you can access.
- **Pathline:** This shows your present location in the sub-menus.
- **Logout/Change platform:** Do not forget to logout after you have done working with your platform. Use platform select to switch between your platforms, if you have more than one.

Under the main menu there is a **help button**, clicking on it will bring up a popup with information on the page you are at.



## Part II: Configuring the Platform

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### 7. Setting up, working with, and deleting user groups

If factline has not already fulfilled the initial steps of organizing your platform (initial pre-setting), your platform is still empty. No one can add texts or files, because permissions still haven't been assigned. Since only groups of users can be given permissions, the first step (before the assignment of the read/write permissions) is to create groups.



#### Authorising individual persons

Permissions can be set to single persons, apart from groups. Note that this could lead to harder maintenance afterwards.

Four groups are pre-defined on your platform:

universe: Everyone = users + guests

guests: Guests are all those who are not registered and all those who have not logged-on.

users: All users which are registered on any FCS platform (if you grant this group certain permissions, you are thus effectively granting permissions to those who are not registered on your platform.)

Platform Main Group: In this group are automatically added all users who will have registered on the appropriate platform. The name of your platform is assigned to the group by the system, for example, „my platform main group.“ This name is usually changed however by the pAdmin to a more platform-specific wording.

#### 7.1. Setting up groups

In addition to the pre-defined groups, you can create your own. We recommend that you add as your first group, „admin\_<platformname>“. You should assign yourself to this group (and then later for all services write permissions)



#### Administrations Permissions

You can register more users in the group „admin\_<platformname>“ at any time; these users, however, do not thereby become platform administrators. Only those pAdmins appointed by the system administrator have access to the pAdmin interface.



#### Test users for the individual services

We recommend that you register some test users who can be assigned by you to other groups. In this way, you facilitate the testing of which areas can be read by users of certain groups and which cannot. To do this, you must first register this test user on your platform. (As pAdmin, you can use the same e-mail address several times for this.)

Of course, you can add new groups at any time. However, for the best administration of your platform, it is recommended that you thoroughly consider the group structure from the outset and establish it accordingly in the very beginning.

**Procedure:**

- |1| Click in the main menu on "Groups"
- |2| Click on the "modify" button next to the "Editing groups" row.
- |3| Although you have already some groups in the platform, you don't see them in the list – this is because the groups "universe", "users" and "guest" cannot be edited. The only group you can see and edit, is the platform main group. Click on the "add group"

Logged in as: AstridH

Groups

Services

Interface

Metatags

Statistics

help ?

[add group](#)

[show hidden groups](#)

[show all groups/users](#)

[Print this page](#)

Groups

All groups on this platform

ID	Name	Description	modify	users	hide
8472	fcs_platform_main_	platform main group			

- |4| You are now at an input form:

group name

description

users in group  [AstridH](#) Astrid Holzhauser

[Karlschmidt](#) Karl Schmidt

Enter a group name and a short description. In addition, you see a listing of all the users who are already registered on the platform. In this case, only the pAdmin and a test user of the pAdmin are specified. Select those users which are to belong to the group (at least one user must be chosen).

**User info**  
Every user name is a link. As soon as you click one of these links, you will see the available information regarding this user.

- |5| In order to execute the procedure, click „submit“ on the left side of the end of the form (to cancel, click „cancel“).

**i For what are the groups, added by the pAdmin, used?**  
You (as pAdmin) can assign these groups permissions yourself. In addition, users can decide, with each creation of a text and/or piece of information, which groups should be allowed to read and/or edit this text. As a default value, a creator can take over the standard selection of the pAdmin (see chapter 8).

## 7.2. Adding users to groups

As part of an ongoing process, more and more users will register themselves on your platform. These users are automatically admitted under the "platform main group," however they must be placed into other groups by you. (In the fifth and final chapter we will explain to you how you can set up an e-mail template in order to remain informed about every new registration).

### Variante 1: Procedure:

- |1| Click in the main menu on "Groups"
- |2| Click on the "modify" button next to the "Editing groups" row.
- |3| You are now at the groups overview. Next to the desired group, click on the "Users" button.
- |4| You now see all the users that are in this group. Click on the "Add user" link on the left side
- |5| Click the checkbox „all Users“. „Search for Users“ will begin the search.

► **Groups | Group fcs admin | Users lookup**

Select search criteria:  
Search keyword:

In field:  **username**  
 **firstname**  
 **lastname**  
 **fullname**  
 **first character of the username**

Or list all users:  **all users**

**Search for users**

Figure 3: Search user

- |6| As a result, a list appears of all the users that are registered on your platform, but were not yet assigned to this group. Select one or more users with a click of the checkbox on the left and click „Add to group.“

**i How does one know if a new user has registered?**  
The system can send an e-mail to you as soon as a new user has registered. Further details are in Chapter 10

**Variant 2: Procedure:**

- |1| Click in the main menu on "Groups"
- |2| Click on the "modify" button next to the "Editing groups" row.
- |3| Click on the link "show all users/groups" in the left side
- |4| Now you are presented a big table, where the columns represent the groups, and the rows – the users. From here, you can quickly manage multiple users and assign/un-assign them to multiple groups
- |5| Click on the link "save changes" below the table, to save your modifications.

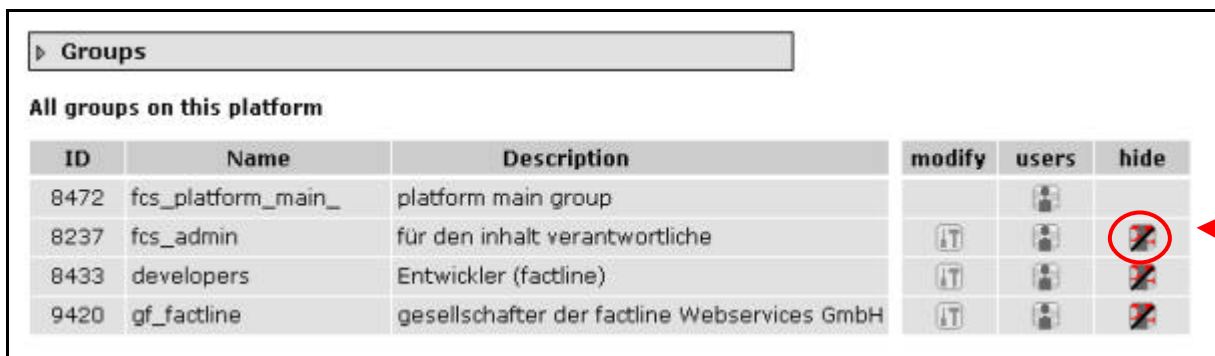
**7.3. Hiding groups ("hide"):**

If you decide that a group already added shouldn't have permissions any more (for example, a project team that doesn't work together as a group any more), you can hide these groups. Then they will neither be visible to you or to the user and can therefore not be given permission for creating new texts. However these groups are only hidden (not actually deleted) because it is possible that old texts are still of use. Therefore the users who were assigned to these groups still have access to these texts.

**i** The „platform main group“ can not be hidden.  
You see the „hide“-option only for the groups you added.

**Procedure:**

- |1| Click in the main menu on "Groups"
- |2| Click on the "modify" button next to the "Editing groups" row.
- |3| Click the option „hide“, that is displayed in the outermost right column next to each group in order to hide the group.



ID	Name	Description	modify	users	hide
8472	fcs_platform_main_	platform main group			
8237	fcs_admin	für den inhalt verantwortliche			
8433	developers	Entwickler (factline)			
9420	gf_factline	gesellschafter der factline Webservices GmbH			

figure 1: hide groups

hide group

The groups are removed immediately from the list and henceforth not displayed in the selection list. You, as pAdmin, also won't see these groups any more. If you would again like to undo this procedure, click the option "show hidden groups" on the left side. There you can again reveal the desired groups („unhide“).

## 7.4. Editing groups:

You can change the names and the description of the groups.

### Procedure:

- |1| Click in the main menu on "Groups"
- |2| Click on the "modify" button next to the "Editing groups" row.
- |3| Click on the "modify" button, next to the group that you want to edit


ID	Name	Description	modify	users	hide
8472	fcs_platform_main_	platform main group			
8237	fcs_admin	für den inhalt verantwortliche			

figure 6: „modify group“ button

- |4| Modify the values you want in the input form.
- |5| Click on the "save" button to save your changes.

## 7.5. Advanced permissions:

Here you can select the groups and/or single users, who should have the possibility to assign permissions per-user (not only per groups).

### Procedure:

- |1| Click in the main menu on "Groups"
- |2| Click on the "permission" button next to the "Advanced permissions" row.
- |3| You now see a table with all groups, and the users in each group.
- |4| By checking/un-checking the checkboxes, select groups or individual users.
- |5| Save your selection, by clicking on the "save list" button at the end

## 8. Assigning Permissions

The permissions system makes it possible for platform administrators (top down) and users and/or „information producers“ (bottom up) to control exactly who is permitted to work on or read which information.

### The pAdmin (top down):

The platform administrator determines which group(s) of users should be able to enter the individual services and which groups are permitted to create the facts of a certain service or in the case of Structure – the groups that have write/work permission in the Structure root. Furthermore, the pAdmin defines standard settings which can later be used by the author creating a text and/or other piece of information.



#### Permissions assigned for a service

You can, for example, make the service „Forum“ accessible only to internal groups (business management, project teams, ...) One without the necessary privileges will then not be shown the service „Forum“ in the menu list.

### The User (bottom up):

Users decide when publishing information whether they would like to take over the pAdmin-defined standard permissions or they would like to be able to set the permissions by themselves. In either case, a list of all the groups is displayed (which were created by the pAdmin and applied system-wide). The users select with a click of the appropriate checkbox, which groups may read and/or change information, or just accept the pre-selection described above.

As pAdmin, you should assign for each service, „access“ (Entrance to a service) and/or „standard“ (pre-defined standard permissions) authorization. Therefore, for almost each service and group, the following checkboxes are available:

"access + read" With this you decide whether a group is allowed to see a service or not. Each group which doesn't have "access-read" permission is not able to see the respective service in the menu bar of the header.

"access + write" This is used to define whether a group is permitted to create content of the fact type of the specific service. For the case of service Structure, this will set the work permissions for the root of Structure (who is able to create folders/shortcuts in the root)

"standard + read" With this you define the pAdmin pre-selection for the "read-permitted" groups, as described above.

"standard + write" With this you define the pAdmin pre-selection for the "write-permitted" groups, as described above.

For some of the services you can only assign access permissions. These services are mostly the "help" services – the ones that does not contain facts inside (like facttext, userprofile, etc.)

**Procedure:**

- |1| Click in the main menu on "Services"
- |2| You see now a list of all services. There is a "permission" button next to each, click on the desired one.
- |3| In the table on the next page, all your groups are displayed as rows, and the columns represent the possible permission settings. In the columns "r" stands for "read", and "w" for "write".  
Make your selection by checking the checkbox on the row of the group, in the column for the permission you want to select.

**Modify permissions for service: Image**

**access** - use service  
**standard** - default value for standard permissions

groupID	name	access		standard	
		r	w	r	w
1	universe	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	users	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1000	guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8237	fcs_admin	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8433	developers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9420	gf_factline	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Figure 4: permission table

In order to grant permissions to several groups you only have to click the respective checkboxes. Examples on the image are as follow:

- 1. In this case, all users of the system ("universe") have access to see the service "Image" in the menu bar and can thus list images, the list of course filtered additionally by the permission set by the creator.
- 2. In this case the group "users" (all registered people) has access-write permission for the service "Image". This means that all logged in users are able to create new Image items.
- 3. In this case, when a user creates a new Image item, when he reaches the permission form, the group "fcs\_admin" is already pre-selected as "write-permitted", and the group "universe", as "read-permitted".

	<b>Explanation of pre-defined groups on FCS-platforms</b>
"universe"	all = users + guests
"users"	all persons which are registered on any FCS-platform.
"guests"	all persons which are not registered and/or not logged on to the system.

- |4| Click on the „save“ button at the bototm, to save your selection.

## 9. Filter (Types & Time Periods) creating / editing

### 9.1. Setting up types

Types are a means of categorizing contents. The platform administrator can define types for „News“, „Events“, „Links“ und „Library.“ Using the filter option in the left column, a user can denote events according to these individual types (categories).

**Eg** **event types**  
In the service „Events“, for example, the types „Today's Appointments“, „Seminars“, „Exhibitions“ can be created.

#### Procedure:

- |1| Click in the main menu on “Services”
- |2| A table with all services is displayed. Click on the “types” button next to the desired service
- |3| A list of types is now displayed (this list is empty at first when the platform is created)

**Modify news types**

The type name must not exceed 20 characters

type name	delete
company news	delete
fcs update	delete
projekte	delete
factchat	delete

Add type:  **Add news type**

Figure 5: add/edit types

- |4| Enter the desired type for each entry in the field “add type” and then click the “add ... type” button beside it.

**i** **Length of the Input**  
Since the user selects the types on the platform from a pull-down menu in the left column, an entry that is longer than 20 characters is not possible for layout reasons (the left column would become too wide for such longer inputs).

- |5| The new type appears promptly above the „add type“ field and can be used immediately on the platform.



## 9.2. Deleting Types

### Procedure:

- |1| Click in the main menu on "Services"
- |2| A table with all services is displayed. Click on the "types" button next to the desired service
- |3| Click "delete" just to the right of the row of the type you want to delete
- |4| The chosen types are deleted and will not be displayed in the list anymore

Once a type is deleted, even though at that time information is still assigned to it, the information is kept without the corresponding categorization.

## 9.3. User-defined time periods by Events

In the service „Events,“ a user can select from among seven standardized time periods (next month, next 3 months, past 3 months, ..), in order to display a list of filtered events. Furthermore, the pAdmin has the possibility to create self-defined time periods for the actual platform. Please note that the standard periods will no longer be displayed, if you have created one of your own self-defined periods. Therefore, all periods must be entered individually.

### Procedure:

- |1| Click in the main menu on "Services"
- |2| A table with all services is displayed. Here click on the "modify" button next to the "events" service.
- |3| Now you have an empty list and a small form before you. In the form there are five entries which must be specified for one time period:
  - Period name:** Enter a short description for the new time period. Only the first 26 characters will be displayed in the drop-down menu.
  - Length:** Enter a number between 1 and 365 in the entry field. Finally, choose in the adjacent drop-down menu the appropriate time interval (days, month, year).
  - Towards:** Specify whether the stated timeframe should be calculated for the past or the future.
  - Default period:** Click this checkbox if you want this period shown first if a user on the platform clicks „Events.“
- |4| Click „create“ in order to save the new time period.
- |5| The saved period appears in the list.

Now you create all necessary time periods after the rows. If you would like to again use the standardized time periods of FCS, click „set default“ at the end of the list.

## 10. Setting up and working with e-mail templates

E-mail templates are texts that define the layout and content and also other metadata of the automatic emails that are sent to the user by the system. For example when a user registers, he receives his password via email – the way this email looks like is defined by an email template. If you don't use this feature, the system default templates are taken. Instead, you can personalize these texts, using this pAdmin option, as described below.

### 10.1. Setting up an E-Mail-Template:

First the general process will be explained: Please take the appropriate inputs in the main field ("Body") from the examples listed below.

#### Procedure:

- |1| Click in the main menu on "Services"
- |2| A table with all services is displayed. Click on the "modify" button next to the "e-mail-templates" service.
- |3| If your platform is new, you should now see a list of standardized E-mail templates. In order to change one of the templates, click on the "modify" link on the appropriate row. If one of the templates is still missing, click on the appropriate link at the bottom.
- |4| The following fields must to be filled out, or the proper options selected:  
**Sender:** Here, fill in the "Sender," in the form of an e-mail address.  
**Subject:** Fill out the subject of the e-mail, e.g.: "Registration"  
**Body:** Provide the e-mail text here (see the example texts).
- |5| Click on "add" or "save" in order to save the template.

### 10.2. Example texts for e-mail templates:

#### E-Mail sent to the user after his registration:

In the following diagram you see the standard e-mail text which a user receives as soon as he/she has registered on a platform. The character string <<username>> means that the system inserts here the respective user name, and the character string <<password>> means that the password (system-generated) is inserted here. You can alter the text as desired, so long as the commands <<username>>, <<password>> remain in the e-mail.

**Editing "registration-welcome" email template**

Template name **registration-welcome**

Sender

Subject

Body

```
Dear User,  
  
Welcome to the factline community  
server.  
Upon your request, a fcs password has  
been generated:  
  
username: <<username>>  
password: <<password>>
```

Figure 2: Registration Confirmation for the user (Standard-Text)

### E-mail sent to the administrator affirming new registrations:

In the following you see how an e-mail template is set up in order that you and/or other users can stay informed about new registrations. You can adapt the text of this e-mail as you desire, so long as the command <<username>> is not changed.

**Editing "registration-welcome-admin" email template**

Template name **registration-welcome-admin**

Sender

Recipients (platform administrators)

- Hella Dietz (hella.dietz@factline.com)
- Astrid Holzhauser (astrid.holzhauser@factline.com)
- Lotte Krisper-Ullyett (lotte.krisper@factline.com)
- Max Harnoncourt (max.harnoncourt@factline.com)

Subject

Body

```
HI,  
  
The following new user: <<username>>  
has registerd on  
http://fcs.kundenplattform.com  
  
Yours  
FCS
```

Figure 3: Administrator reports of the fcs.kundenplattform.com

### E-Mail Notification:

Each user can define within which services and/or folders he/she would like to be informed, as soon as a new text is added or an old one is deleted or edited. This information is sent to him alternatively every day, every week, or once per month. In the figure below you see the standard text for this e-mail. Please note that, as long as the original commands are kept, you can adapt the text as desired.



**Editing "notification" email template**

Template name **notification**

Sender support@factline.com

Subject Notification

Body

```
Dear <<username>>,  
  
the following changes were made on the  
platform:  
  
<<changes>>
```

cancel save

Figure 4: Notification-E-Mail, an example from fcs.kundenplattform.com

## 11. Copyright message

Every platform includes a footer (unless a special design is made by factline). In this part is displayed the "copyright message". The default message is "powered by: factline Community Server." You can change this text at any time.

### Procedure:

- |1| Click in the main menu on "Interface"
- |2| Click next to the row "Messages" the "modify" button
- |3| Click on the "modify" button next to the "Copyright message"
- |4| You can now type the desired data into the appropriate input field. If you would like to insert a link, you must supplement the code with `class="link"` [see Figure].

z.B.: `<a class="link" href=http://www.factline.com>factline</a>`



Figure 5: editing copyright message

- |5| Click on "save" to save your changes. Your new copyright message is instantly taken, and shown on your pages.

## 12. Print layout

Every fact can be printed out, with the help of the "print preview" button in the left frame. The header of the print layout page, can be adjusted.

### Procedure:

- | 1 | Click in the main menu on "Interface"
- | 2 | Click on the "modify" button next to the "Messages" row
- | 3 | Click on the "modify" button next to the "Print layout" row
- | 4 | In the following input entry, by default you see the code of the standard print layout header. You can change it as you want. Formatting of this message is done via HTML. Certain system information can be included with special code:

System informatino	
Platform Title	<<title>>
URL of the printed page	<<url>>
Date	<<date>>

The code of the standard header, is the following:

```
<html>
<table>
<tr><td><span style="font-size: 16px; color: #000000;">
<b><<title>></b><br></span>
<span style="font-size: 12px; color: #333333;"><nobr>
<b><<url>></b></nobr><br></span>
<span style="font-size: 12px; color: #333333;"><nobr><<date>>
</nobr><br></span>
</table>
</html>
```

- | 5 | Click on "save" to save your changes.

## 13. Metatags for Search Engines

In order that your platform is found more easily and registered by search engines, it is advantageous to define so-called "Meta-Data". This data may also be useful a web browser. This data mainly contains information about the author, contents of the files, key words, copyright data, and other, about your pages. With the help of the interface in the pAdmin, you can set/change your meta data.

### Procedure:

- | 1 | Click in the main menu on "Metatags"
- | 2 | In the row "groups" select the checkbox in the column "edit" from the property selector and click "next".  
Now complete the following fields:  
**revisit-after:** this is a request to the search engine robot to search through the contents of the platform again after a certain period of time. Use the following format input; for example, "20 days."  
**author:** Name of the author of a platform  
**DC.Language:** Here you can indicate the national language in which the contents of the file are written. Language abbreviations are expected; e.g., German = de, English = en, Spanish = es, .... you can find a list of all the language abbreviations under the following URL:  
<http://www.loc.gov/standards/iso639-2/englangn.html>  
**DC.Rights:** Here you can create a copyright message for the contents on your platform. You can indicate, in addition, the URL under which the exact copyright data is given.  
**DC.Publisher:** Here you can enter who is responsible for the publication of the data. That can be the author him/herself, but also a publishing house.  
**DC.Contributer:** Here you can indicate the co-author(s) or person(s) who are otherwise considerably involved with the contents, besides the main author (For example, a commercial artist, musician, or translator). In case you enter several pieces of data, separate the names using commas.
- | 3 | Now the following fields are still missing:  
You can enter the description (description of contents) and the keywords in several languages. In addition, please give the respective pair of fields the appropriate language abbreviations (see DC.Language)  
**language:** Here you must enter the language abbreviation.  
**description:** This text is displayed in the "hit-list" of a search engine, if your platform comes up in a search as a possible result.  
**Keywords:** With these you can accurately describe your platform. People that search for one of these key words using a search engine should be directed by the search engine to your platform. Do not enter too many key words. It is recommended to enter at most 20 key words. It also makes sense to list the words in singular and plural.
- | 4 | Click "save metatags" in order to save the data.

## Part III: Design of the Platform

### 14. Editing the startpage (home page)

"Startpage" designates the contents and/or the construction of the home page of your platform. Here are two examples:

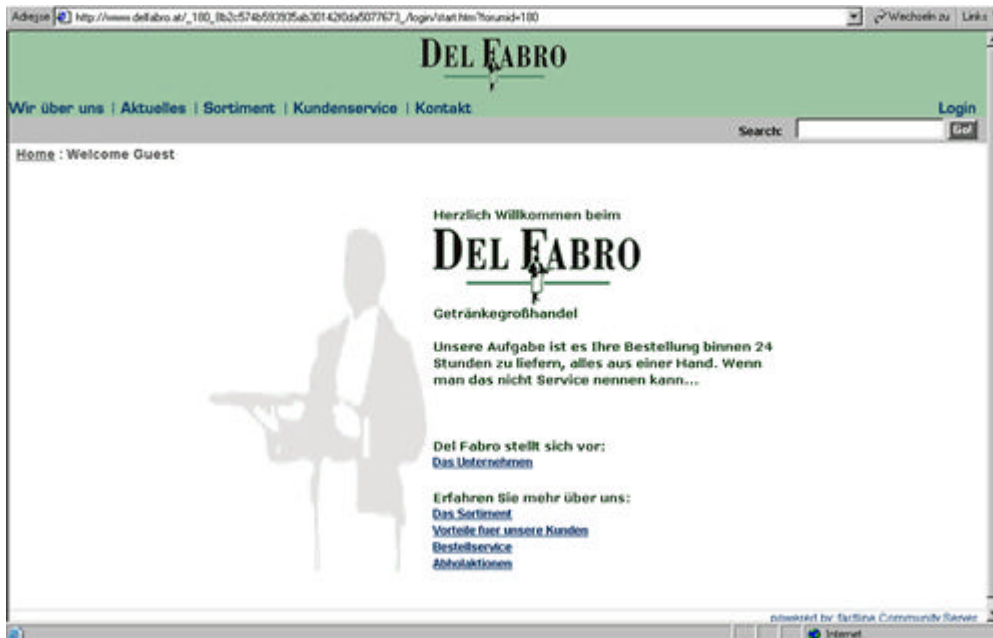


Figure 6: Customer platform <http://www.delfabro.at>



Figure 7: The customer platform for users of FCS: <http://fcs.kundenplattform.com>

You can use the start page of your platform in order to inform all of your guests about the platform or your project, announce chat times, or link to different folders (Themes, Projects) of the service "Structure", etc.



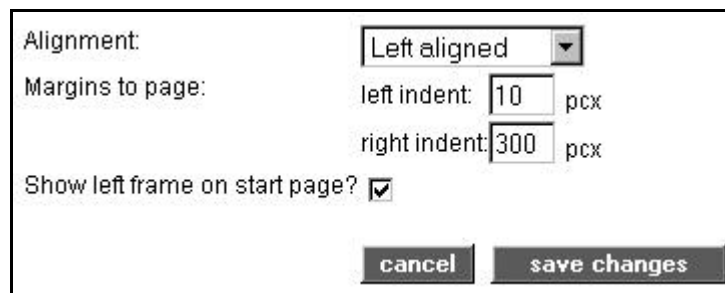
In case you decide to make only certain registered user's information accessible, here you can compose a short text which explains that users must log themselves in.

**Procedure:**

- |1| The startpage is edited from the page where it is displayed – in the platform itself, not in the pAdmin. So log-in in the platform, with your pAdmin username and password.
- |2| On the startpage, at the bottom, there are two links – “edit start page”, and “start page history”
- |3| Click on the link “edit start page”
- |4| The startpage form appears. In the title field you can put a title to your startpage (like “Welcome to the platform”), but this field is not mandatory, and you can leave it empty. In the field “Contents”, you can enter as much text and/or html as you like. You can insert pictures by reference with an infold, or create links to items from the platform, using the special syntax (As described in the User Manual, Chapter 12 and Chapter 13). It is completely mandatory, if you are to use HTML, to start and end your text with <html> and </html>, as it is again described in the User Manual.
- |5| Below that, there are some options on how to position your startpage:

Alignment: In the drop-down menu, you can select whether you would like to have the startpage left-aligned, center-aligned, right-aligned, or justified.

Exact positioning using pixels (Margins to page): Here you can enter exactly how many pixels should the startpage be indented to the left, and right, respectively.



The screenshot shows a configuration window for the startpage. It contains the following elements:

- Alignment:** A dropdown menu currently set to "Left aligned".
- Margins to page:** Two input fields: "left indent" with the value "10" and "right indent" with the value "300". Both fields have "pcx" (pixels) as a unit label.
- Show left frame on start page?:** A checked checkbox.
- Buttons:** "cancel" and "save changes" buttons at the bottom.

- |6| At the end, you can check the “Show left frame on start page?” checkbox – thus the left frame with the use menu, will be also visible on the startpage (by default, it is not displayed there at all, but if you have special menu links inside, you can use this option to show it).
- |7| Click „save changes“. Your change is immediately viewable on the platform.

## 15. Header design

The header of your platform can be adjusted. You can change simple things like text colors, size, backgrounds of the main elements, thus making your header look the way you like, making it different from the other platforms. More advanced designs can be implemented at the moment only by factline, upon request.



**Special Design:**

If factline has already made a special design for your header, by using the header design interface, you will delete the one created by factline.

**Procedure:**

- |1| Click in the main menu on "Interface"
- |2| On the following page, click on the "modify" button next to the "Header design"
- |3| At the top of the following screen you can see a header guide image with letters and numbers in it. The input fields below, refer to the following:
  - Point (1): Here you can change the platform title, and the font for all texts in the header
  - Point (2): Choose the character to be placed between the menu buttons
  - Point (3 - 6): Choose the background color for the header parts (lines)
  - Point (1, 7 - 8): Choose text size and color
  - Point (A - C): Choose the heights in pixels of the header parts
  - Point (9 - 10): Choose the space in pixels around the partner image.
- |4| Click on "Save Changes" to save your modifications. Changes will be immediately visible on the platform.

## 16. Setting up the Stylesheet

Stylesheet ist an abbreviation for CSS (Cascading Style Sheet). The stylesheet is a type of template for HTML pages. In this template, the fundamental layout data (background colors and fonts) are specified for all pages

### Procedure:

- | 1 | Click in the main menu on "Interface"
- | 2 | On the following page, click on the "modify" button next to the "body design"
- | 3 | A stylesheet consists of several elements and/or classes. In the following figure you see an overview of all classes.



Figure 8: Class Overview

Some classes still have further sub-classes. Click the plus symbol just to the left of the class label in order to reveal the sub-classes. Classes that lie next to a gray checkbox serve only as a "heading"; changes can only be made in respective sub-groups



**Help Button:**

Knowing which elements of the individual classes can be changed is simple, using the help-buttons. Click a button and it opens a pop-up window, from which you can infer all necessary data.

- |4| Click on the title of a class in order to specify or change the format parameters. To be able to edit several classes simultaneously, select the desired classes using checkboxes and then click "edit selected" (bottom center).

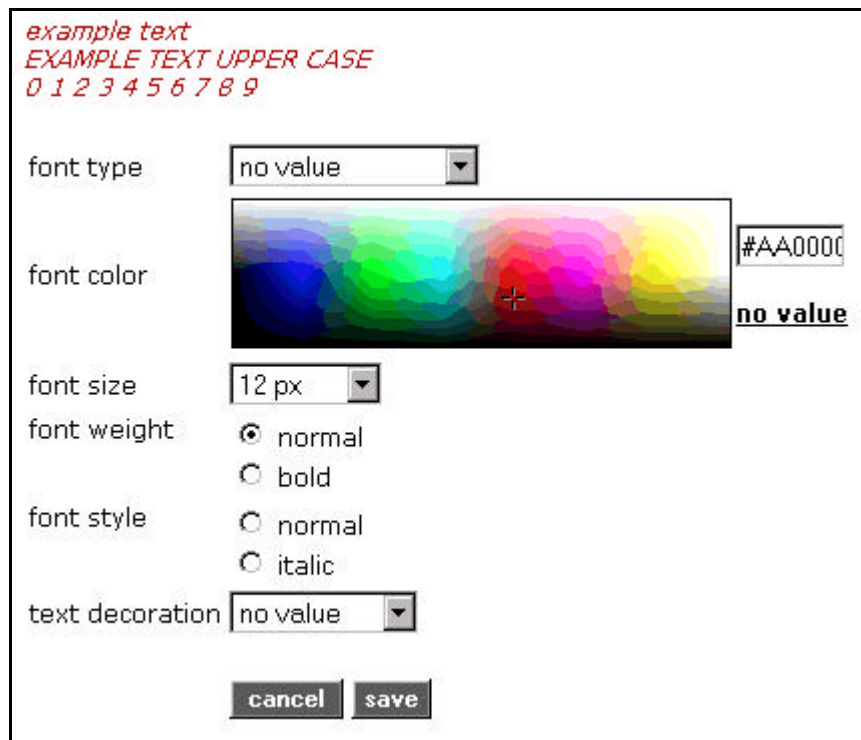


Figure 9: editing class

- |5a| In classes, which refer to characters, you can create six different settings. You can specify the font color in two different ways. Either you select it from the color overview table, or you enter the exact color value in the input field beside the color selection.
- |5b| You want to revert back to the default settings for this particular class? Then click on the link "reset class" at the bottom.
- |6| Click on the "save" button to save your specifications. The changes are immediately viewable in your platform.

If you want to restore the FCS standard stylesheet for the entire platform, then click "reset css file" in the stylesheet interface start page.

## Part IV: Maintaining the Platform

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### 17. User Administration

More and more users will register themselves on your platform, as part of an ongoing process. These users are automatically admitted under the "platform main group", however they must be placed into other groups by you.

**A short overview once again of the steps needed to assign a user to a group(s):**

- |1| Click in the main menu on "Groups"
- |2| Click on the "modify" button next to the "Editing groups" row
- |3| You have now a list of groups – click on the "users" button next to the desired group
- |4| Now you see all users who are already in this group. Go to "add user."
- |5| Click the checkbox "all users." "Search for Users" begins the search.
- |6| The results display a list of the users who are registered on your platform, but were not yet assigned to this a group. Select this or another user by clicking the checkbox and then clicking "Add to group"

(see also part II, 1., "Adding users to groups").

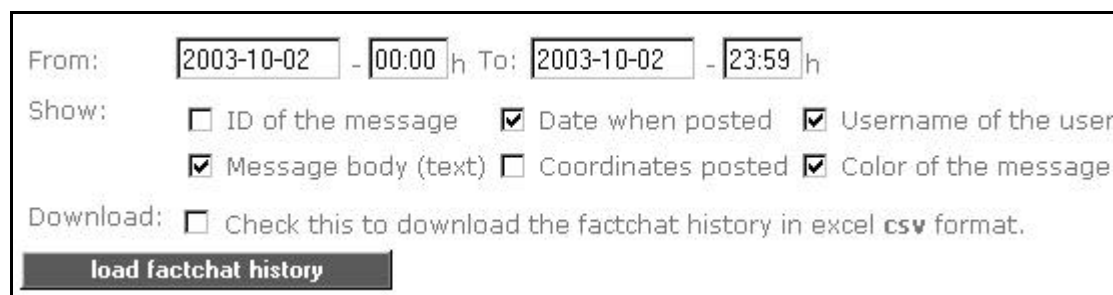
In order to always keep informed if a user has been newly registered, you will be given an e-mail template, as described in part II, chapter 10.

### 18. factchat editor

The factchat editor was integrated in the interface of the pAdmin for platforms that have factchat. With the help of the factchat editor, you can save factchat conversations in tabular form. Thus the evaluation and documentation of individual discussions should become easier for you. Furthermore, you can delete individual messages (postings) from factchat.

**Procedure:**

- |1| Click in the main menu on "Services"
- |2| In the services list, click on the "modify" button next to the factchat row.
- |3| A selection window opens, in which several options can be chosen:
  1. From which time frame do you want messages displayed? The fields are automatically filled in with the current dates. Please adapt the input in the given format to meet your needs.



The screenshot shows a web interface for editing factchat history. It includes a date and time range selector, a list of checkboxes for what information to display, and a checkbox for downloading the data in CSV format. A 'load factchat history' button is at the bottom.

From:	<input type="text" value="2003-10-02"/>	-	<input type="text" value="00:00"/>	h	To:	<input type="text" value="2003-10-02"/>	-	<input type="text" value="23:59"/>	h
Show:	<input type="checkbox"/> ID of the message	<input checked="" type="checkbox"/> Date when posted	<input checked="" type="checkbox"/> Username of the user						
	<input checked="" type="checkbox"/> Message body (text)	<input type="checkbox"/> Coordinates posted	<input checked="" type="checkbox"/> Color of the message						
Download:	<input type="checkbox"/> Check this to download the factchat history in excel csv format.								
<input type="button" value="load factchat history"/>									

Figure 10: factchat editor

2. Which details of the displayed reports would you like to receive?

The most important details are automatically checked for you. The selection can be adapted accordingly. The following fields can be selected:

**ID of the message:** The unique number of the posting

**Date when posted:** Date and time of the message posting

**Username of the user:** The Username of the author

**Message body (text):** Text of the message

**Coordinates posted:** Spatial coordinates of the message (in the grey chat field)

**Color of the message:** Background colors of the message

For the time being, we recommend that you do not check the checkbox next to the text: „Check this to download the factchat history in excel csv format.“

- [3] Click on „load factchat history“ in order to bring up the list of the desired data in your browser window.
- [4] The list of the desired data should now be displayed.
  - A) If no data is returned, then there were no messages written during the period selected. Please broaden the chosen time frame and click again on „load factchat history“.
  - B) Should you want to delete one or more factchat postings, you can select individual messages with the help of the checkboxes and subsequently delete them with the button, „Delete checked messages.“

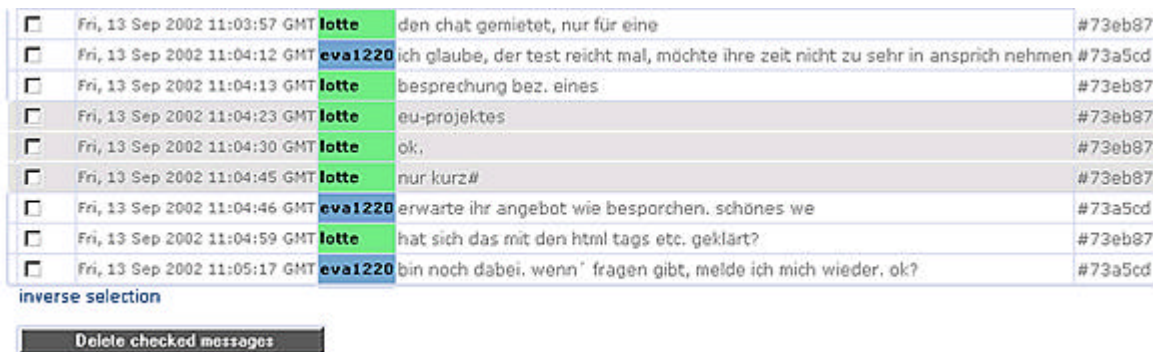


Figure 11: factchat history

- [5] If you now want to save the appropriate data, select „Check this to download the factchat history in excel csv format“ just above. Subsequently, click once more on „load factchat history.“
- [6] Your browser now opens a small gray window in which you are asked whether you would like to save the csv data or directly open it (csv data files then open in MS-Excel to be worked on). In order to save, select the option „save data on storage medium“ and click „OK“. Now the standard window of Windows Explorer opens. Navigate to the directory in Explorer in which you would like the factchat messages to be saved, and finally click „save.“ The data is now saved.

## 19. Analyzing Statistics

Another, not described up to now option in the property selector is statistics. You can have the following statistics using pAdmin:

- How much storage space ("web space") and data traffic ("traffic") are presently used [=Platform general].
- Which users have registered in the last month. Which users have been logged on in the last days and how often.[= Users]
- For each service you can see which facts have been created, when they were created, and when the last time they were modified. Besides this, you can see how frequently the fact has been read since it has been created.[=Service related]

|1| Click on the main menu on "Statistics"

|2| Now you can see a table with three possibilities. Click on the desired "view" button. You can find details for the three areas below.

### 19.1. Platform statistics:

Here you can see the amount of storage space used on your platform at the moment, and how much traffic it has generated (see diagram).

(In case these values exceed the limits set in the standard price, factline will include this additional usage on your bill.

### 19.2. User statistics:

From this table you can find out which users have registered in during the last months. Besides, you can see which users have logged in the last days and for how long they have stayed logged in.

Statistics > Groups and users				
<b>New Users since 21 Sep. 2003 in platform factline community server:</b>				
Userid	Full name	Username	Since (registered)	
15638	boouser2 boouser1	boouser	7 Oct. 2003	
15639	IT_1b IT_1a	IT____1	7 Oct. 2003	
15640	IT2 IT1	IT____2	7 Oct. 2003	
15641	boobooboo2 boobooboo1	boobooboo	7 Oct. 2003	
<b>Logins for the last 10 days (GMT)</b>				
Userid	Full name	Username	Login From (GMT)	Login To (GMT)
8231	Boyan Filipov	ignis	13 Oct. 2003 11:09:34	13 Oct. 2003 14:13:44
8231	Boyan Filipov	ignis	13 Oct. 2003 17:32:35	13 Oct. 2003 18:02:36
8231	Boyan Filipov	ignis	14 Oct. 2003 11:07:20	14 Oct. 2003 12:12:19
8231	Boyan Filipov	ignis	14 Oct. 2003 12:22:51	14 Oct. 2003 14:30:42
8231	Boyan Filipov	ignis	14 Oct. 2003 14:30:52	14 Oct. 2003 18:27:19
8231	Boyan Filipov	ignis	15 Oct. 2003 12:59:49	15 Oct. 2003 14:04:33
8231	Boyan Filipov	ignis	15 Oct. 2003 17:31:33	15 Oct. 2003 17:37:32

Figure 12: groups statistics

### 19.3. Statistics for the services (text, news, events, etc.):

Here you have the possibility to query statistics for each of the services. The first table displays the summarized statistical data for each of them. In order to see broader details for a service click on the "view" button on the corresponding line.

Of special interest might be the number "Times read": Here you can find out how often this document has been opened.

Below you can see a detailed list for the statistic of the news-facts:

news							
	number of facts	service size	times read				
	totals:	20	20,08 KB	83.592			
▼ infoID	title	creation	last update	versions	size	times read	
106275	Test News	4 Dec. 2001	4 Dec. 2001	1	528	527	
106400	Konferenz zum Thema Farben	11 Dec. 2001	11 Dec. 2001	1	401	1.202	
107301	Podiumsdiskussion auf der Exponet am 13. Februar 2001	15 May. 2002	15 May. 2002	4	610	1.467	
107493	factline auf CeBIT 2002	14 Jan. 2003	14 Jan. 2003	5	742	1.368	
110414	New Look&Feel	14 Jan. 2003	14 Jan. 2003	2	928	1.148	
116478	Beratungschat erstmals öffentlich präsentiert	14 Jan. 2003	14 Jan. 2003	2	1.585	200	

Figure 13: service statistics