User manual
for factline platforms *

*based on factline Community Server (FCS)

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Part I: General information

1. Introduction

This manual aims at explaining all functions and services that users of factline platforms based on the factline Community Server (FCS) need. As the FCS is improved continuously, the user manuals are also updated in frequent intervals. You can find a version of this manual on our information platform **http://fcs.kundenplattform.com**. However, we recommend the interactive online manual as it is always up-to-date. Moreover, a support forum as well as a search function is at your disposal on the information platform.

You can always test all functions on our test platform:
http://test.kundenplattform.com

2. Roles and functions

To run a factline platform, people with three different levels of privileges are required. In order to better understand these levels, we would like to begin by giving a short explanation.

There are 3 levels of privileges in the hierarchy:

· **system administrator ("s-admin"):**
  The system administrator assigns one or more platform administrators ("p-admin") to each platform.

· **platform administrator ("p-admin"):**
  The platform administrator provides each user group with access and/or publishing rights for particular services (see chapter 6.2. Services, p. 13).

· **User:**
  Users set permissions for the content they create.

Users' privileges are located on the lowest level of the hierarchy. The FCS hierarchy can be better clarified using an analogy of the construction and use of a house:

· The purchaser (designer) announces what the house (the platform) should look like.

· The system administrator (builder) transfers a finished house (platform) to one or more platform administrators (new owners).

· The platform administrator sets the house rules, divides the users into groups, distributes access keys to each user and structures the arrangement of the house (the arrangement of the content on the platform).

· Only a few users visit the house, while others inhabit it. Inhabitants have different keys with which they have access to different rooms. In these rooms, they help with the arrangement, expand rooms or change them. Entry doors for which users possess no key, are not even visible to them.

If factline acts as an Application Service Provider (ASP), the platform runs on a server owned by factline. In this case, factline takes over the tasks of the s-admin.

3. Users' possibilities

Users have different rights according to the user groups they are in and the permissions set for these groups by the p-admin. In principle, a user has only access to content and services for which he/she has been authorized (see chapter 14. Permissioning system, p. 40).

A user can:

- register

- change his/her password

- change his/her settings (user data such as address, telephone number, photo...)

- retrieve reports ("notifications") concerning the modification of content items

- read content (the permissioning system controls who sees what)

- create content (the permissioning system controls who is able to create content within a service or folder)

- combine content items with each other ("link")

- edit content (permission settings control who is permitted to edit what)

- delete content (permission settings control who can delete what)

- set permissions for new or modified content

- get into contact with other users (ping, chat, forum,…) provided these services are activated

4. Registration/login – user settings/password

4.1. Registration/login

In order to be able to work on your platform, you have to register. You only have to register once in order to use any factline platform on. You only need to enter your name and an e-mail address. All information will be kept in confidence, of course. Each platform administrator decides individually which rights he/she assigns to newly registered users.

In order to register, proceed as follows:

(1)   Click on "Login" in the header *[see figure 1]* of your platform.

figure 1: Login

(2)   Now, you are on the login-page. Click on "want to register".

(3)   You are directed to an input mask. Please fill in all input fields.

(4)   Click on "register" to finish your registration.

You will receive an automatically generated password by email within a few minutes. Then you can log in.

If you do not receive an email with your password, please contact factline via email support@factline.com.

> **Username**
> We recommend choosing a combination of your first name and your surname as a username. This facilitates the distinction between users.

If you are already a registered user (and thus have a username and password), you can login by clicking on the "Login" button *[see figure 1].*

> **Forgot your password?**
> Click on the "Forgot your Password?" link on the login page and enter the username and e-mail address you used to register. Within a few minutes, you will receive a new password via email.

4.2. User settings/password

After you have logged in, you will see a "Settings"-button on the right side of the menu bar *[see figure 2]*.

figure 2: Settings

All personal data is specified in the settings. If you click on "Settings", you will be directed to an overview page. The overview page shows you a summary of your personal data and tells you to which users groups you belong to.

In the so-called "options area" (left column) you see the "settings"-box. At present, there are five areas:

1. personal information settings
All data in the personal settings can be viewed in your user profile (except password!). Access to the user profile is possible by clicking on your name in the metainfo of a fact.

    a. personal information
    Here you can change your name, birth date, e-mail address, image,...

- ping messages
  Moreover, you can determine whether you want to receive ping messages.

- preferred editor
  In addition, you can decide whether you want to use a text editor by default (e.g. epoz-facttext).

- instant messenger
  Finally, you can indicate which instant messengers (e.g. ICQ, Skype, Yahoo, MSN,...) you use. Click on "add messenger". Choose the respective instant messenger from the drop-down menu and insert your user data (e.g. ICQ number, Skype name,...).

    Moreover, you can determine whether you want to receive ping messages from other users. In addition, you can specify which text input mode (plain text, text editor) you want to use by default.

    b. address
    Here you can enter your address.

    c. telephone
    Here you can enter your telephone number.

    d. Password
    In the fourth area you can change your password. Type in your old password once and your new password twice. Finally, click on "change" to save your new password. Please note, that the system only checks the first eight letters of a password. Your password, may consist of more than eight letters, of course.

2. Notification

In the fifth area you can request and define the details of an automatic report on changes made on your platform (see chapter 21. Email notification, p. 61).

All settings are saved by clicking on the "submit"-button.

5. Navigation on the platform
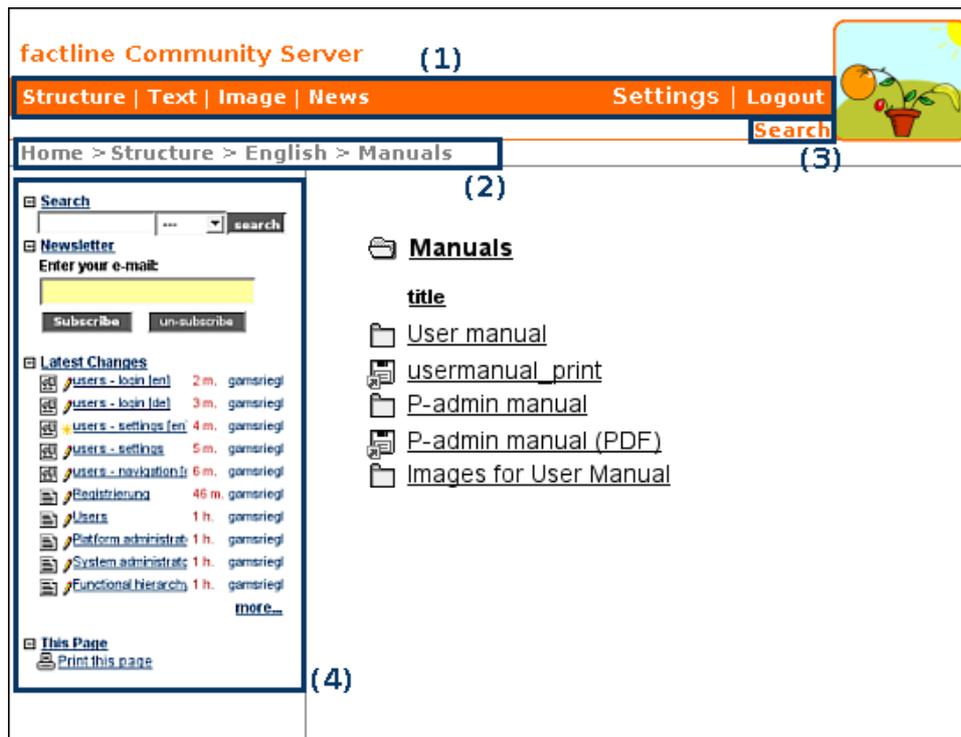
figure 3: Navigation on the platform

5.1. Main menu

In the header of your platform you will find the main menu *[see figure 3]*. In the standard solution provided by us, "Structure" (see chapter 6.1. Structure, p. 13) is on the left side, followed by buttons for the other Services (see chapter 6.2. Services, p. 13) your platform offers. On the right, you see the "Settings" and "Login/Logout" buttons.

The menu buttons for Structure and Services can be replaced with other buttons according to your wishes. In this case, the individual Services are accessible via a drop-down menu in the left column *[see figure 4]*. There you will also find a link for "Structure".

figure 4: Access to Services

5.2. Pathline – vertical navigation

Below the header of your platform *[see figure 3]*, you will see a pathline that shows which area of your platform you are currently in (eg. "Home > Structure > English > Manuals"). If you want to jump to a higher level in the hierarchy, simply click on the respective designation in the pathline (eg. "English").

The titles displayed in the pathline are shorter than the original title, for space saving reasons.

5.3. Advanced search

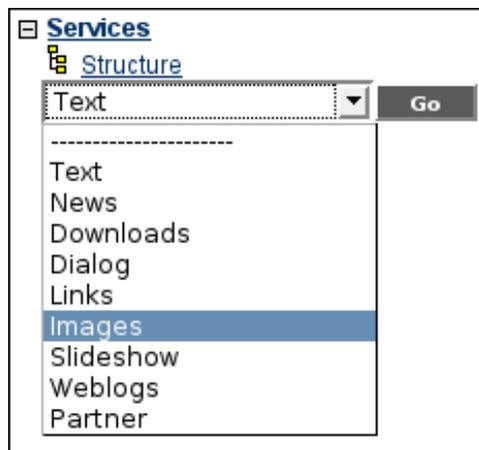On the right sight, between header and pathline, is the button "Factlist & Search" *[see figure 3]*. You can search for content on the platform with keywords. If you press the "Search"-button without making any choice, ALL facts on the platform will be listed. For detailed description of the functionalities of "Factlist & Search", please see chapter 24. Factlist & Search, p. 66.

5.4. Options area (left column)

The options area (left column) consists of numerous boxes. These boxes contain information on facts displayed in the main frame. Moreover, you will find all edit-options there.
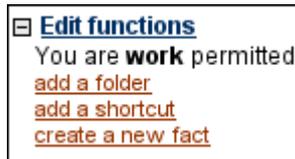
figure 5: Example of a box

Platform administrators decide which boxes are visible in the options area. They can determine that some boxes are only visible to certain groups.

The following boxes are available:

Info	Permissions for the fact, which is displayed in the main window, are shown. > see chapter 14. Permissioning system, p. 40
Services	Direct access to all service repositories. > see chapter 6. Design of the system, p. 12
Login	Login input fields.
Edit functions	Links for creating, editing, deleting facts. > see chapter 6. Create Content, p. 17
Filter	News, Event, Library, Link facts can be filtered by date and type. > see chapter 6.2. Services, p. 13

View	Options for changing the display mode.
	> see chapter 19. Forum, p. 57
Settings	Menu for editing the personal settings.
	> see chapter 4.2. User settings/password, p. 7
Notification	Menu for adapting notification settings.
	> see chapter 21. Email notification, p. 61
Help	Auxiliary information
Users online	Overview of all users who are currently logged in.
Latest changes	List of 10 latest changes which have been published.
Search	Search input mask.
	> see chapter 24. Factlist & Search, p. 66
Newsletter	Menu for newsletter subscription.
This page	Ideal print version of the fact displayed in the main window.

5.5. Previous|next – horizontal navigation

If required, users can activate a horizontal navigation. By doing so, users can directly jump from one fact to the next within a folder. Subsequently, facts do not need to be opened and closed individually. If the horizontal navigation is activated, arrows showing the title of the previous/next fact are displayed at the bottom of the fact below the meta data. You can activate the horizontal navigation while creating or editing a folder (see chapter 16.1. Create folders, p. 44).

figure 6: horizontal navigation

6. Design of the system

The design of factline platforms greatly differs from common software products. Therefore, it is essential to understand the basic design of the system.

Services   Each factline platform disposes of an individually selected choice of so-called "Services". Upon request, services can be activated and deactivated later on.

Basically, services allow you to publish different *types* of content (e.g. a text, a file, a picture). Subsequently, each service allows for a distinctive presentation of content types. As a result, a normal text looks different from a picture.

Facts   Each content item is referred to as a "fact".

Filings   All facts of a particular service are saved in seperated repositories called "service filings". The repositories can be accessed via the main menu or the service box in the options area.

Structure   The service "Structure" consists of folders which can be organised hierarchically. Folders can be used to order facts thematically.

Shortctus   Folders always contain shortcuts. Basically, a shortcut is a link to an original fact which is stored in the respective service filing. Subsequently, it is possible to assign one fact to several different folders.
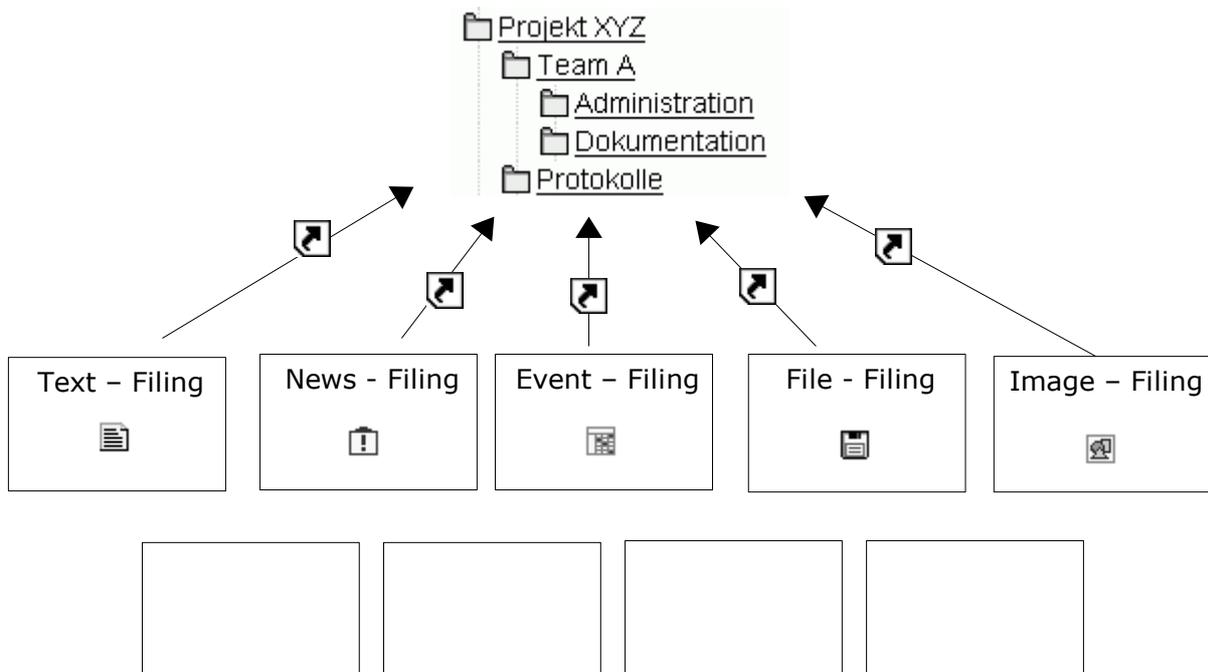
figure 7: Design of the system

6.1. Structure

In the service Structure you can order content thematically and/or hierarchicallly via folders and shortcuts. One single fact can have various shortcuts to different folders in the structure. The fact itself is only saved once in the respective service filing.

> **i** An individually designed menu bar (see chapter 5. Navigation on the platform, p. 9) can have buttons linking to files or facts in the "Structure".

In order to understand the relation between Structure and Services read through chapter 6. Design of the system, p. 12.

6.2. Services

A factline platform is made up of individually selected modules called "Services". The relation between the different services is explained in chapter 6. Design of the system, p. 12.

At the moment FCS offers 18 different services:

A) 13 Content-Services

Content-Services allow you to publish the content (facts) on your factline platform. Each service offers a distinctive representation of information with different full text and list view options.

B) 5 Functional-Services

These Services provide support for more effective arrangement of content as well as for working processes on the platform.

> **i** The names of Services used in this manual are standard designations used by factline. Other names are possible.

Content-Services		
	Text	Used for creation/storage of text items. Complex texts can be created with the help of a text-editor (see chapter 6.5. Working with the epoz-facttext editor, p. 23). Moreover, you can create formatted text using standard HTML formatting tags (see chapter 25. HTML Tips and Tricks, p. 68).
	News	Read through the latest news. The entire news archive can be searched by date and/or news type.
	Downloads	Download and upload of externally-created files. Each file can be provided with metadata.
	Images	Upload images and include them in texts (see chapter 6. Create Content, p. 17).
	Events	List of events which can be listed according to date and type of event.
	Links	Collect, categorize and describe links. The entries are searchable by type.
	Library	Insert, view, filter bibliographic references.
	Forum (asynchronous communication)	Here you can post ("write") short statements regarding a particular topic. A structured question-and-answer construction, facilitates discussions among several people (see chapter 19. Forum, p. 57).
	Slideshow (Album)	Present a large number of pictures. Several options to view the pictures are offered (eg. thumbnail preview, zoom, browse,...). For more information see chapter 22. Slideshow (Album), p. 63.
	factchat (synchronous communication)	The participants can freely arrange their written contributions on the chatboard or link them to other chat messages. As a result, the relationship between messages is easily recognizable. In addition, all contributions are automatically saved in a searchable archive (see chapter 20. factchat, p. 60).
	Weblog	A special method of publication for the web. The 10 most recent entries are displayed. Weblog entries can be browsed with a calender.
	Comments	Below each fact (except "forum"), users can add comments or view comments which have already been made. Comments are searchable in "Factlist & Search". They can be linked as they dispose of an infoID (see chapter 9. Meaning of the infoID, p. 29). Moreover, the user sees which version of the fact the

		comment refers to. A fact passes its reading permission on to its comments (see chapter 14. Permissioning system, p. 40).
	Partner	In the header, logos of associates change continuously at frequent intervals. The logos can be linked to the respective websites. For further information see chapter 23. Creating/Editing Partners, p. 65.

Functional-Services	
Factlist & Search	Fulltext and advanced search on the whole platform. You can list all contents of a specific content-service (see chapter 24. Factlist & Search, p. 66).
Structure	Create a hierarchical structure of folders and facts (see chapter 16. Organize Structure, p. 44).
Notification	Sent by email informing about changes on the platform (see chapter 21. Email notification, p 61)
Users online	Show all users that are currently online on the same platform. You can send users who are online short messages ("ping"). Click on the "ping"-button next to the user's name and insert your message in the pop-up window. The receiver gets your message as soon as he opens a new site or clicks on "refresh" in his browser window. The receiver can reply to your message directly.
epoz-facttext editor	Text-editor for writing and formatting text (see chapter 6.5. Working with the epoz-facttext editor, p. 23).

Part II: Create Content

6. Create Content

There are two possibilities to create content. However, not all users have access to both possibilities.

6.1. Possibility 1 – Structure

Below, we will explain possibility one in details. With possibility one you work directly in the Structure. This option is most common as a fact and a shortcut are created at the same time (see chapter 6. Design of the system, p. 12).

In order to create a fact in Structure, proceed as follows:

(1) In the Structure, navigate to the folder where you want to create a fact.

(2) In the left frame (options area) in the edit-box, click on "create a new fact".

figure 8: edit functions box

(3) Select the desired fact-type from the list (text, file,...).

(4) Fill in the Input Mask (see chapter 6.3. Input mask, p. 19).

(5) Click on "next >>".

(6) Choose the permissions. A group overview opens in which you have to set the permissions (see chapter 14. Permissioning system, p. 40).

In most cases you will be provided with a pre-selection by your Platform Administrator ("P-Admin"), which you can accept or adapt according to your wishes.

(7) Click on the "Preview" button to check your input.

Now you can see the finished layout of your fact. The fact is stored together with a unique infoID (see chapter 9. Meaning of the infoID, p. 29).

In order to allow other (permitted) users to read your fact, you must publish it (see chapter 7. Publish content, p. 24).

6.2. Possibility 2 – Service filing

When you create a fact in a service filing, the fact does not have a shortcut to a folder. A shortcut can be created later on (see chapter 11. Create links - references, p. 32).

There are two possibilities to access a service filing:

A) Access via main menu:

(1) Choose a Service (Text, News,...) from the main menu or from the drop-down menu in the left frame (options area) by clicking on it.

(2) In the left column (options area) click on the link "create new …".

(3) Continue with step 3 described in chapter 6. Create Content, p. 17.

B) Access via Factlist & Search:

(1) click on the "Factlist & search".

(2) In the left frame (options area) click on "create new fact".

(3) Choose a fact-type from the list.

(4) Continue with step 3 described in chapter 6. Create Content, p. 17.

> ⓘ If you do not see a "create"-link, then you are not authorized to create information (see Chapter 14. Permissioning system, p. 40).
>
> Ask your platform administrator for authorization.

6.3. Input mask

Please fill in all fields of the input mask. You will find additional information about the specific fields on the next pages (see chapter 6.4. Explanations of individual fields (alphabetical lists), p. 20).

Formatting text

You can format your entries in the input fields "Text" and "Description". There are three different modi for formatting text:

1) Text-Mode:
The text entry can be formatted with simple HTML-tags.

For further information see chapter 25. HTML Tips and Tricks, p. 68.

2) Editor-Mode.
Editors allow you to format text similar to Microsoft Word. The FCS offers two different editors:

a) epoz-facttext editor-Mode:
Epoz-facttext is new on the FCS! It works on all Internet Explorer and Mozilla browsers without any extra PlugIn. Moreover, users can copy formatted text from Word or websites directly. There are no losses in formatting during the conversion from and to the new epoz-facttext editor.

You can find detailed help about its use by reading through chapter , p. .

b) facttext–editor–Mode:
The facttext-editor ist the predecessor of the epoz-facttext editor.

You can find detailed help about its use on our information platform:
http://fcs.kundenplattform.com/121631.0/

3) HTML-Mode:
The text has to begin with <html> and end with </html>. This entry-mode is necessary for complex HTML syntax (particularly with tables!).

For further information see chapter 25. HTML Tips and Tricks, p 68.

Inserting other text elements

In addition to typed text, you can also insert the following elements:

▪ Images (see chapter 12. Integrate pictures, p. 36)

▪ Links (see chapter 11. Create links - references, p. 32)

▪ facts (see chapter 13. insert facts (includefact), p. 39)

6.4. Explanations of individual fields (alphabetical lists)

Author	In this field, you can enter the name of the author. As soon as new content is created, the system automatically inserts the name of the registered user in the author field. However, if your are not the actual author of the text, you can enter another name. The field "Published by" automatically indicates the publisher of the text.
Copyright	Please enter who owns the copyright for this information.
Date	The system suggests the current date as a default setting. If you want to enter another date, please keep to the following format: JJJJ-MM-DD (eg. 2005-08-23).
Description	In this field, you can enter a description for a fact (of a picture, an uploaded file, etc.)

For further details see field description "Text". |
| **Event type** | Select the appropriate type from the pull-down menu in order to categorize your event. This way users will be able to filter the events. If only the option "all" is displayed, the platform administrator did not define any event types. |
| **File data** | This field allows you to upload documents to the platform:
Click the button "Browse" right next to the field "file data". The standard Windows-Explorer window opens. Then navigate to the directory where the file to be uploaded is located, click on the file name and then click "open". The path is now indicated in the field "file data" on your platform. |
| **Internet type** | Select the appropriate type from the drop-down menu in order to categorize your link. This way users will be able to filter links. If only the option "all" is displayed, the platform administrator did not define any types. |
| **Language** | Please select the language of the content you created or edited. |
| **List layout** | If you create a folder, you can choose between two list-options:

1) standard-list:
simple list with title and metadata

2) thumbnail-list:
List with thumbnail-preview for images and slideshow (album).

If you do not see the drop-down menu, ask your platform administrator to activate this option. |
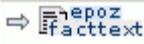| **Literature type** | Select the appropriate type from the drop-down menu in order to categorize your literature information. This way users will be able to filter the bibliographic references. If only the option "all" is displayed, the platform administrator did not define any types. |

News type	Select the appropriate type from the drop-down menu in order to categorize your news. This way users will be able to filter news. If only the option "all" is displayed, the platform administrator didn't define any types.
Password	Please note: 1. The password can consist of numbers and/or a combination of numbers and characters. 2. The password is case-sensitive.
Permissions	You can decide which user group should be permitted to read and/or edit information. For further information see chapter 14. Permissioning system, p. 40.
Place	Place of news,event, etc.
Publishing house	Please enter the name of the publishing house which releases the book/magazine.
Screenshot	Here you can enter the infoID of a screenshot picture. This screenshot must be uploaded to the platform beforehand (see chapter 12. Integrate pictures, p. 36). A screenshot should not be bigger than 400 pixels in width. In order to find the infoID of an already loaded screenshot, click „browse images". A list of all available pictures will be displayed.
Shortname	The selected short title appears in the pathline.
Source	Please indicate the source of the information here.
Text	There are three possibilities for text input: 1) **Text-mode:** The text input can be formatted with simple HTML tags. 2) **Editor-mode:** Editors allow you to format text, similar to Microsoft word. a) epoz-facttext See chapter 6.5. Working with the epoz-facttext editor, p. 23 b) facttext see http://fcs.kundenplattform.com/121631.0/ 3) **HTML-mode:** The text must begin with \<html\> and end with \</html\>. This variation is necessary for a complex HTML syntax (particularly for tables!). For further information see chapter 25. HTML Tips and Tricks, p. 68.
Title	Enter a title.
URL	Please indicate the URL of the referenced book/article/magazine,...

	here. Please note: Every URL should begin with the string "http://".
Username	Please select a username. With this username you identify yourself on the platform.
Year	Please indicate the year of publication for the work.

6.5. Working with the epoz-facttext editor

switch to epoz-facttext

In order to switch to epoz-facttext, click on the button ⇨ 📋epoz facttext which is under the input field for text. Please be patiened! Your browser will need some time to load the epoz-facttext.

Now, you can begin to enter your text into the editor-window. In order to format, select the respective piece(s) of text and click on the appropriate button. As soon as your text entry and formatting is complete, click "next>>".

delete formatting

Highlight the piece of text whose formatting you want to delete and click the button.

insert a factlink

Direct the cursor to the desired position and click the button. You can either insert the infoID directly or conduct a search. In order to do so, insert a keyword of the fact you want to link. Choose the desired fact from the list by clicking on it. The infoID of the fact then appears in the position which was chosen in the beginning eg. "[102073.0]". In the final view of the text the infoID will be replaced by the title of the fact.

insert images

Direct the cursor to the desired position and click the button. Choose your image by clicking on it. Please note that you have to upload an image beforehand (see chapter 12. Integrate pictures, p. 36).

create an external link

Insert a linkname and highlight it. Click the button. Then enter the URL of the website you want to link and click on "OK".

create tables

Click the button and a little pop-up window will open. Insert the number of columns and rows. Please note that only Mozilla-Firefox allows you to add columns or rows later! Finally, indicate whether your table should have a margin or not.

7. Publish content

A fact is exclusively visible to you until you click on the "publish" button *[see figure 9].*
The version number of the infoID (see chapter 9. Meaning of the infoID, p. 29) shows
"edit" *[see figure 9].*

In order to publish a fact, proceed as follows:

(1) Click on "publish", in order to enable all permitted users
(see chapter 14. Permissioning system, p. 40) to view the fact.
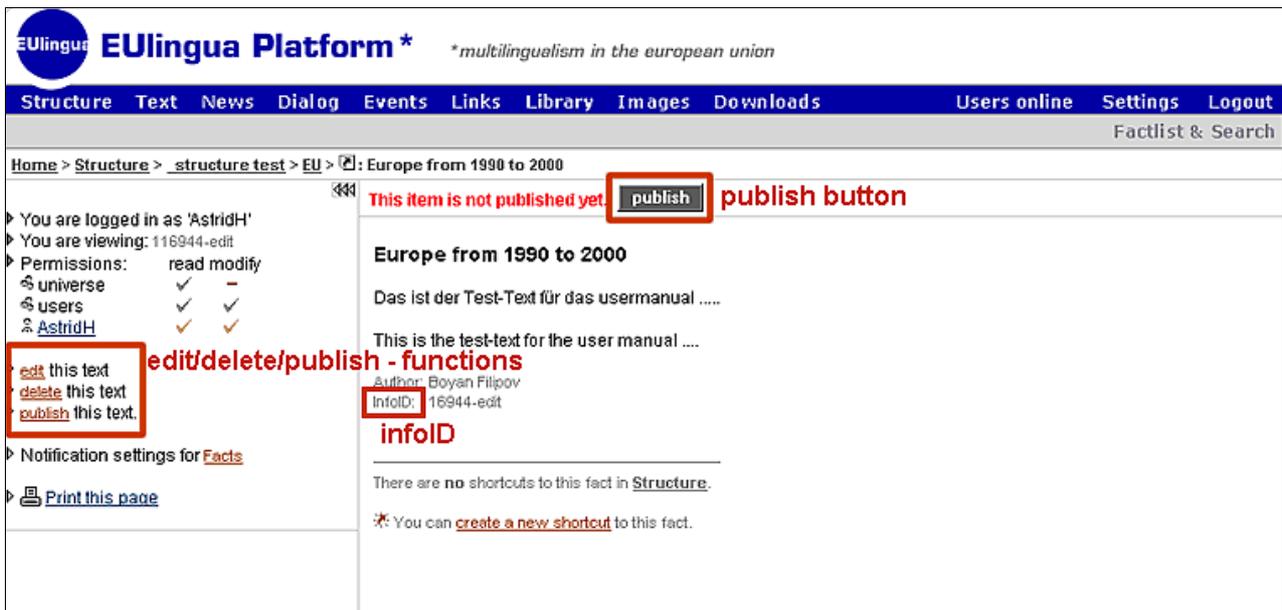

figure 9: edit/delete/publish – Functions

(2a) Your fact is now visible to all permitted users
(see chapter 14. Permissioning system, p. 40).

(2b) If the feature "guarantee of existence" is activated on your platform, you will be
asked to indicate a gurantee of existence for the fact
(see chapter 7.1. Guarantee of existence, p. 25).

At the bottom of the fact, you can see the name of the user who published it and the
number of exisitng versions. The system automatically registers the name of the logged
in user. Each time the fact is edited and newly published, the name of the publisher is
indicated next to the "Published by" info text below the fact.

> **Different author - publisher (editor)**
>
> The publisher is the person who publishes the fact in the system. Sometimes,
> publisher and author are different persons. In these cases, the field "Author" can
> be used to type in the name of the actual author, which will be displayed below
> the fact next to the "Author" info text.

7.1. Guarantee of existence

You can activate the feature "guarantee of existence" (GOE) on FCS platforms. When activated, users can set a guarantee of existence (GOE) for facts. Whether or not a fact disposes of a gurantee of existence is indicated in the metadata below the fact. facts with guarantee of existence can only be deleted when the guarantee has expired.

Set guarantee of existence (GOE)

During the publishing process you will be asked to set a guarantee of existence *[see figure 10]*.

(1)   You can choose between three options:

= 0:   The fact will have no guarantee of existence.
= date: Choose a specific date by clicking on the "calender"-button.
              The date must not exceed the GOE maximum.
= maximum: The fact will be kept for the maximum lenght of time which is
              indicated below the title of the interface *[see figure 10]*. The GOE-
              maximum is set by the P-Admin and can be extended at any time.

figure 10: set guarantee of existence

(2)   By clicking on the checkbox, users with editing permission are authorized to extend the guarantee of existence.

(3)   Click "publish" in order to enable all permitted users
(see chapter 14. Permissioning system, p. 40) to view the fact.

Extend guarantee of existence (GOE)

If you see an "extend"-link *[see figure 11]* in the metadata of the fact, you are authorized to extend the guarantee of existence for the fact.

figure 11: extend guarantee of existence

(1) Click on "extend". A new window opens *[see figure 12]*.

figure 12: extend guarantee of existence

(2) Choose between two options:

= date: Choose a date by clicking on the "calender"-icon.
The date must not exceed the GOE maximum.
= maximum: The fact will be kept for the maximum lenght of time which is indicated below the title of the interface *[see figure 12]*. The GOE-maximum is set by the P-Admin and can be extended at any time.

(3) Click on the "set"-button.

8. Update Content

Modify permitted users (see chapter <u>14. Permissioning system</u>, p. 40) can update facts. The updated content will be saved in a new version of the fact (see chapter <u>10. Version control system</u>, p. 30).

When you have published your changes, the updated version is placed over the initial version, and receives a higher version number

eg. infoID="102095.**2**" instead of infoID="102095.**1**"

(see chapter <u>9. Meaning of the infoID</u>, p. 29). The old version is hidden and will not be displayed in Structure or in the service filings any more.

In order to update content, proceed as follows:

(1)   Log in.

(2)   Open the desired fact in the main window.

(3)   In the left frame (options area) in the edit box, click on "edit".

(4)   Enter the changes in the Input Mask.

(5)   Click on "next >>".

(6)   Choose the permissions (see chapter <u>14. Permissioning system</u>, p. 40).

(7)   Click on the "Preview" button to check your input.

        (a)   If you want to change anything click on "edit" (see step 3).

        (b)   If you are satisfied with the preview, click on "publish".

> ℹ Even if information is updated, it is still possible to refer to an older version. When creating references, you can decide if you want to refer to a particular version or to the most current version (see chapter <u>11. Create links - references</u>, p. 32).

Update a "Downloads" fact

The content service Downloads offers the possibility to store files that have been created with another software application.

If you want to upload a new version of file to the platform, proceed as follows:

(1)   Open the existing file fact in the main window.

(2)   Click with the right mouse button on the file link.

(3)   Click on "Save target as".

(4)   Save the file on the hard drive of your computer.

(5)   Edit the file on your computer and save the changes on your hard drive.

(6)   Return to the old download fact. Click on "edit" in the left column.

(7)   In the now opened input mask in the field "File Data" you can enter the updated file.

(8)   Click on "next >>".

(9)   Choose the permissions.

(10)   Click on the "Preview" button to check your input.

(11)   If you want to change anything click on "edit" otherwise click on "publish".

9. Meaning of the infoID

The system automatically assigns an infoID to every created fact on the platform. The infoID of each fact is displayed in the infobox in the options area (left column) and on the bottom of each fact in the metadata of the fact.

The infoID consists of two parts:

102070.**12**

main number   **version number**

main number:	An automatically created, sequential number combination.
version number:	If you edit a fact, a new version is created. In order to be able to distinguish between versions, a sequential version number is attached to the main number (see chapter 10. Version control system, p. 30)

The main number of the infoID is consistent. As concerns the version number, there are two more variations:

102070-**edit**	If you see „-edit" instead of the version number, the document is being worked on and has not been published yet.
102070.**0**	In order to link automatically to the most recent document available, type „0" for version number (see chapter 11. Create links - references, p. 32).

A fact can be accessed directly by inserting the infoID in the address line of the browser window *[see figure 13].*

http://fcs.kundenplattform.com/112163.7/

figure 13: infoID in the URL

10. Version control system

The FCS has its own version control system which allows you to update and/or edit documents, without losing older versions. Individual versions are identified by the version number at the end of every infoID (see chapter 9. Meaning of the infoID, p. 29). With the help of the infoID, you can link to specific versions (see chapter 11. Create links - references, p. 32). You can determine who is permitted to edit a version of a document (see chapter 14. Permissioning system, p. 40).

> **Please note!**
> Several users may produce new versions simultaneously. However, the outcome is not one, collective version. As long as a version is not published, altered content is not visible.

10.1 The fact-archive

In the fact-archive *[see figure 14]*, you see all versions of a fact together wit their infoID (see chapter 9. Meaning of the infoID, p. 29), title, publication date and author. Moreover, you see which versions are still available and which versions have been deleted. Click on the title to access a particular version. If you are not permitted (see chapter 14. Permissioning system, p. 40) to view a version the title is not displayed.

⮐
📄 **A text with history - copyauthor**

Version history:

📄 401613.8	**A text with history - copyauthor**	02 Aug 2005 15:48	fcs - Boyan Filipov
📄 401613.7	**A text with history - long**	02 Aug 2005 15:33	fcs - Boyan Filipov
📄 401613.6	**A text with history - long**	02 Aug 2005 14:42	fcs - Boyan Filipov
📄 401613.5	**A text with history - final**	01 Aug 2005 18:34	fcs - Boyan Filipov
📄 401613.4	This fact has been erased.	-	-
📄 401613.3	No permission to view fact.	01 Aug 2005 18:33	fcs - Boyan Filipov
📄 401613.2	**A text with history - universe**	01 Aug 2005 18:33	fcs - Boyan Filipov
📄 401613.1	No permission to view fact.	01 Aug 2005 18:33	fcs - Boyan Filipov

figure 14: fact-archive

You can either access the fact-archive via the infobox in the left column *[see figure 15]* or by clicking on the "history"-link in the metadata *[see figure 16]*.

figure 15: fact-archive in infobox

figure 16: fact-archive in metadata

facts with only one version do not have a fact-archive. Therefore, no link is displayed.

Old versions are hidden (see chapter 18.2. Hide content, p. 53). Subsequently, they are not displayed in the structure (see chapter 6.1. Structure, p. 13) or in the service filings (see chapter 6. Design of the system, p. 12).

11. Create links - references

The infoID (see chapter 9. Meaning of the infoID, p. 29) allows you to refer to every piece of information that is stored on an FCS platform. Moreover, you can link to any document on the Internet using a web address (Uniform Resource Locator – URL).

> **Online Help**
> Remember, if you open an input mask with a text entry field, you can always find a summary of linking possibilities on the left side at „How to link".

11.1. Reference to an infoID = factlink

A link in the world wide web indicates the location (address) of a website at a certain time (link to an URL). Information on an FCS platform is referenced via a unique identifier, the „infoID" (see chapter 9. Meaning of the infoID, p. 29). In other words, a link on an FCS platform does not refer to a certain location but to the piece of information itself. As a result, links always remain intact even if a document is moved to another folder or to another platform. Subsequently, there are no „dead links"!

Create a factlink in facttext- or epoz-facttext editor mode

Direct your cursor to the desired position, or mark a particular word you want to link.

Then click on the factlink button or . Enter a keyword or the infoID of the fact you want to link to. Select the desired fact in the list of results. Then, "[factlink]" appears in the position selected previously. In the finished text view, the title of the fact will be displayed automatically.

> **Delete links in the facttext-editor mode**
> To delete a previously created factlink, highlight the link and click on the "delete link"-button .

Create a factlink in Text- or HTML-mode

In order to refer to a document using an infoID, you have two possibilities of syntax entry:

(1) Short form:	`<factlink 102491.0/>`
	In this case, the title of the document to be referenced will be automatically displayed as a link. The factlink links to the most recent version of the document.
(2) Long form:	`<factlink 102070.43>Old Introductory version</factlink>`
	In this case, the title of the link is set independently from the title of the referenced document. This factlink will lead to version number 43.

If you want the reference to open in a new window, use the following syntax:

Short form:	`<factlink 102491.0 target="_blank"/>`
Long form:	`<factlink 102070.43 target="_blank"> Old Introductory version </factlink>`

> ### How can I search for an infoID?
> In most cases, you will not know the infoID of the desired fact by heart. Therefore, you can find the link "search infoIDs" in the left column next to every area for entry input. If you click on the link, a search field opens, in which you can enter a keyword of the desired fact. After clicking the „search" button, a list is displayed of all matching facts available on the platform together with their infoIDs.

11.2. Reference to an Internet address (URL)

In facttext-editor mode

Highlight a word you want to link. Then click on the link-button . A window with an input mask opens. Enter the desired URL (internet address) of the website you want to link to and click on the OK -button.

In epoz-facttext editor mode

Highlight a word you want to link. Then click on the button . Enter the desired URL (internet address) of the website you want to link to and click on "OK".

In text or HTML-mode

If you want to link to websites on the Internet, please insert the conventional HTML syntax:

```
<a href="http://www.factline.com/">Designation</a>
```

You can also specify that the link should be opened in a new window:

```
<a href="http://www.factline.com/ "target="_blank">factline Homepage</a>
```

11.3. References from external documents to a fact (infoID)

If you want to insert a link to a fact on an FCS platform in an email write down the URL of the platform and the infoID of the fact (see example below).

http://fcs.kundenplattform.com/104247.0

| URL of platform | infoID of fact |

If a registration is necessary to read the fact, the link will lead directly to the login-page of the platform. Once the user has successfully logged in, the desired information will be displayed.

12. Integrate pictures

To include a picture („image") in a piece of text, there are two necessary steps:

12.1. Upload pictures

In order to upload an image from your computer to the platform, you have to create a fact of the type "image".

(1)   Choose "image" from the main menu or from the drop-down menu in the left column.

(2)   Click on "add image" in the left column.

(3)   Fill in the input mask. Next to the field "File Data", click on the "Browse" button. The standard Windows-Explorer window opens. Navigate to the folder where your image is located. Click on the title of the file and then "open".

(4)   Click on "next >>".

(5)   Set the permissions and click on "Preview".

(6)   Finally, click on "publish".

> ⓘ   Please note, that you have to publish the created image. Otherwise, other users will not be able to see it.

12.2. Integration of an Image

In editor-mode

If you are working in the epoz-facttext or facttext editor-mode, you can easily insert a picture (see chapter , p. and 6.5. Working with the epoz-facttext editor, p. 23).

In text- or HTML-mode

In all other cases, a special code (syntax) has to be entered at the position where you want to place the picture (see example below).

```
<factimage 104281.1/>
```

> ⓘ   **How can I search for an infoID?**
> In most cases, you will not know the infoID of the desired fact by heart. Therefore, you can find the link "search infoIDs" on the left column next to every area for entry input. If you click on the link, a search field opens, in which you can enter a keyword of the desired fact. After clicking the „search" button, a list is displayed of all matching facts available on the platform together with their infoIDs.

12.3. Align pictures

width, height

If you integrate a picture using Text or HTML mode, it is advisable to specify the width and/or the height of the image. If the browser knows how big the graphic is, the site will load faster. Furthermore, the specification of the height and width allows you to change the size of the picture:

```
<factimage 104281.1 width="30" height="30"/>
```

However, contortions can occur if you do not keep to the exact width and height proportions. If you want to avoid contortions, simply enter either width or height:

```
<factimage 104281.1 width="30"/>
```

OR

```
<factimage 104281.1 height="30"/>
```

alignment

In order to be able to adjust a picture, take note of the instructions below:

Align a picture between paragraphs	`<div align="alignment"><factimage 104281.0/></div>`
	Enter one of the following values for "alignment": center = the picture is centered left = the picture is positioned on the left side (left-justified) right = the picture is positioned on the right side (right-justified)

Align a picture in a text	`<factimage 104281.1 align="alignment"/>`

	Enter one of the following values for "alignment":
	
	`top =`
	The picture is positioned at the top margin of the text line.
	`middle =`
	The picture is positioned in middle of the text line.
	`bottom =`
	The picture is positioned at the bottom margin of the text line.

Allow text to flow around a picture	`<factimage 104281.1 align="adjustment" hspace="Left Right" vspace="TopBottom"/>`
	Type in one of the following values instead of "adjustment":

<table>
<tr><td></td><td>

`left =`
aligns the picture on the left side (text flows around on the right side)
`right =`
aligns the picture on the right side (text flows around on the left side)

`LeftRight (= horizontal distance):`
type in a number, for example 10, in order to determine the distance (in pixel) from the picture to adjoining objects left and right.

`TopBottom (= vertical distance):`
type in a number, for example 10, in order to determine the distance (in pixel) from the picture to adjoining objects at the top and bottom.

</td></tr>
</table>

Set picture as a button	`<factlink 117559.0><factimage 104281.0 border="0"/>` `</factlink>`

13. insert facts (includefact)

The internet offers the possibility to link single pieces of text in order to form so called hypertexts. This is the essence of the internet (a network of computers). It is contrary to printed text which is usually linear.

Additionally, the FCS allows users to insert the content of a fact in its full length (full text) into another fact. As a result, dynamic content-items can be combined without redundancies. This feature is called "includefact" and is available for facts of the type text, file and folder.

In order to use this feature you need to enter the following code:

`<includefact 102073.0/>`	The complete fact, including its metadata, is displayed.
`<includefact folder.id display="icon,title,infoid"/>`	The content of a folder (title, icons and infoID) is displayed.
`<includefact text.id display="title,text,metainfo" />`	The text is displayed together with its title and its metadata.
`<includefact file.id display="title,description,file"/>`	A file-fact is displayed with its title, description and file link.

14. Permissioning system

Assign permissions

Permissions are assigned when creating and/or editing facts. After clicking on the "next>>" button in the "add" or "edit" input mask (see chapter 6. Create Content, p. 17), a group overview is opened *[see figure 17]*. There you can specify the permissions. Usually, a pre-selection is offered to you, which you can accept or adjust.

> ℹ The pre-selection is determined by your P-Admin.

figure 17: set permissions

General permissions

🔓	**read**	Read-permitted groups are only allowed to read facts. They are not allowed to edit or delete facts.
✏	**modify**	Modify-permitted groups can write, edit, and/or delete facts.

Special permissions for forums

📰	**create topic**	These groups can create topics and postings in a forum.
↩	**post (Forum)**	Post-permitted groups can only reply to postings. They are not allowed to delete and/or edit the title and description of a forum.

Special permisions for folders

	work (for a folder in Structure)	These groups can create facts, shortcuts, subfolders in the folder but they cannot change the folder (eg. title, description) itself.

Why are permissions needed?

A sophisticated permissioning system allows the platform administrator, authors and publishers to control exactly who is permitted to read and/or edit particular pieces of information.

15. Group functions

Permissions can be assigned for every fact on the factline Community Server. Permissions are given to groups and, only in special cases, to specific users. Basically, there are two types of groups.

15.1. System groups

These are groups that are created by the system by default. No users have to be assigned to these groups by the P-Admin, since the allocation takes place automatically.

Universe	All registered (= users) and unregistered (= guests) users. guests + users = universe
Guests	Users who are not registered or who are not logged in.
Users	All users who are registered on a (any) FCS-platform.
Platform Main Group	This group includes every user that is registered on your platform. The system will automatically assign the platform name as title of this group (eg. "my platfrom_main group"). The P-Admin can change this.

15.2. Self-defined groups

Groups which are set up and maintained by the P-Admin. For each platform, an indefinite number of user-groups can be defined as desired. The platform administrator (P-Admin) determines which groups are available. Any number of users can be assigned to a particular group and vice versa.
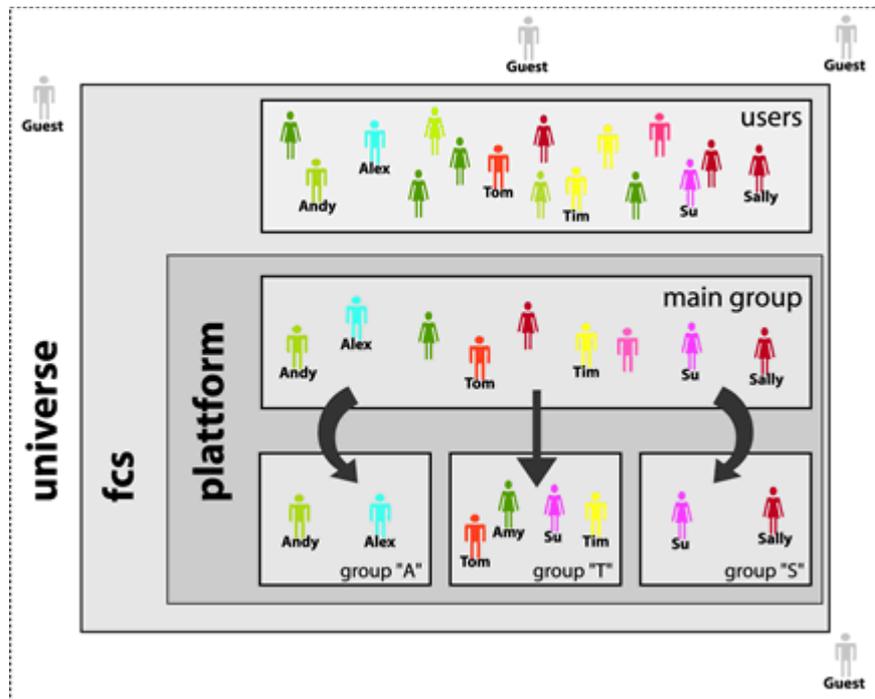
figure 18: groups

The hierarchy while working with groups

The platform administrator sets up groups and decides, for each platform, which groups get which permissions. For example, the platform administrator can authorize particular groups to have no access to the service „factchat" (see chapter 20. factchat, p. 60). Furthermore, the platform administrator can define a pre-selection of permissions for the publication of information (see chapter 14. Permissioning system, p. 40).

The users assign permissions for individual facts during the publishing process (see chapter 14. Permissioning system, p. 40). They can either accept the pre-selection given by the P-Admin or adapt it.

16. Organize Structure

The service "Structure" (see 6.1. Structure, p. 13) helps you to maintain an overview of the content on your platform. It allows you to create a hierarchical tree structure made up of folders and shortcuts.

For a better understanding of the relation between structure and services, read through chapter 6. Design of the system, p. 12.

16.1. Create folders

(1)   In "Structure", navigate to the position where you want to create a new folder.

(2)   Click on "add a folder" in the edit functions box on the left side *[see]*.

(3)   Insert a title and a shortname *[see]*. The shortname will be displayed in the pathline (see chapter 5. Navigation on the platform, p. 9).

(4)   Choose one of two list-layouts *[see]*:

    (a)   standard-list: list with title and metadata

    (b)   thumbnail-list: list with additional image preview for the services "image" and "slideshow"

> (i) If you do not see the drop-down menu, the standard-list view will be used. Contact your platform administrator to activate this feature.

(5)   Click on "next >>".

(6)   Set permissions

🔧	**read**	Read-permitted users will see the folder.
🔧	**work**	Users are allowed to create, move and delete shortcuts in the folder.
🔧	**modify**	Users are allowed to edit the title of the folder.

(7)   Click "preview". If you want to change anything click "edit" in the left column otherwise click on "publish".

16.2 Create shortcuts

A shortcut is a link which points to a fact. Shortcuts can be created and deleted as often as you want. The original fact will not be affected by this. Subsequently, one single fact can be displayed in several different folders which is a huge advantage. Changes of a fact will be visible at all shortcut positions.

A shortcut can be recognized by the attached arrow next to the appropriate fact-icon:

Original fact   Shortcut
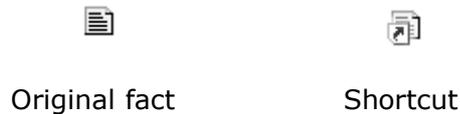
There are two ways to create shortcuts:

Way 1 – from within Structure (in the respective folder)

(1)   In the structure tree, navigate to the folder where you want the new shortcut to be created.

(2)   Click on the link "add a shortcut" to the left . The next page is divided into two different areas *[see figure 19].* On the top, there is a search input mask that is used to retrieve infoIDs. Below, are two input fields for the infoID: main part and version number (see chapter 9. Meaning of the infoID, p. 29).

figure 19: create a shortcut – way 1

If you conduct a search, you receive a result list *[see figure 20]* of matching facts together with their infoIDs. If you click on one of the two version links, the input fields at the bottom are automatically filled. The left infoID link creates a shortcut to the most

figure 20: create a shortcut – search for an infoID

(3) Click on "next>>" to create the shortcut.

Way 2 – starting form the fact itself

At the bottom of the page of each fact, you can see if there are already any shortcuts to this fact *[see figure 21]*. Below, is a link for creating a new (additional) shortcut to this specific fact.

figure 21: Shortcuts of a fact

(1) Click on "add shortcut".

(2) Decide whether you want a shortcut to a particular version or the most recent version ("this version" or "latest version").

(3) The complete folder structure of the platform will open *[see figure 22]*. Keep in mind that only folders are displayed. Click on the link "create shortcut" next to the folder where you want the shortcut to be created.

figure 22: create a shortcut – structure tree

```
Creating a shortcut to the latest version of "Verknüpfung (Shortcut)" (126578.0).

Please select the folder, where the shortcut should be created.

📁 Structure                                           127118.1 ≪ create shortcut
   📁 English                                          209931.0 ≪ create shortcut
      📁 Manuals englisch                              112599.0 ≪ create shortcut
         📁 Usermanual online english                  109514.0 ≪ create shortcut
            📁 Functional Hierarchy                    115656.0 ≪ create shortcut
            📁 Registration/Login/Settings             109655.0 ≪ create shortcut
            📁 Structure and Services                  109612.0 ≪ create shortcut
               📁 Structure_e                          152679.0 ≪ create shortcut
               📁 Notification_e                       152683.0 ≪ create shortcut
               📁 Factlist & Search                    134809.0 ≪ create shortcut
            📁 Create Content                          109564.0 ≪ create shortcut
               📁 Writing Content                      181118.0 ≪ create shortcut
                  📁 Explanations of fields of the Input mask 109569.0 ≪ create shortcut
               📁 References                           153089.0 ≪ create shortcut
               📁 Versions                             122131.0 ≪ create shortcut
            📁 old stuff                               110632.0 ≪ create shortcut
         📁 pAdmin manual online english               143723.0 ≪ create shortcut
         📁 Hierarchy                                  203609.0 ≪ create shortcut
         📁 basic functions                            161279.0 ≪ create shortcut
```

(4) The shortcut is now created in the chosen folder. You are directed back to the page of the fact to which you created the shortcut. On the bottom of the page, in the shortcut-info you can see the path of the new shortcut.

17. Organize/move content

Sometimes, you might want to rearrange content in your "Structure". Subsequently, it is necessary to be able to move shortcuts. Please note, the arrows at the right side in the list-view.

If you want to move a shortcut, you have to check its radio button on the right side. Afterwards you can choose between three possibilities:

17.1. Rearrange shortcuts within the same level

Click on the arrow of the shortcut, above which you want to move your selected shortcut. If you move the mouse over an arrow, an "info text" appears [*see figure 23*].

figure 23: rearranging information within levels

17.2. Move shortcuts to a higher level

Click on the arrow at the top. The selected shortcut is moved to the next upper level *[see figure 24].*

figure 24: moving information to an upper level

17.3. Move shortcuts to another folder

Click on the double arrow (rightmost) of the folder into which you want to move your shortcut *[see figure 25].*

figure 25: moving a fact into another folder

18. Remove content

There are different options for deletion of facts on platforms of FCS. These options can be ordered hierarchically:

Delete option	fact exists?	fact searchable?	explanation
Delete shortcuts	yes	yes	A shortcut (see chapter 16.2 Create shortcuts, p. 45) is a link which points to a fact. If you delete a shortcut, the original fact will be maintained in the service filings. The original fact can still be found via Factlist & Search (see chapter 24. Factlist & Search, p. 66)
Hide content (facts)	yes	no	Hidden facts are not displayed on the platform. They cannot be found via Factlist & Search either. However, they still exist on the server. Hidden facts can be accessed via infoID (see chapter 9. Meaning of the infoID, p. 29).
Delete content (facts)	no	no	Deleted facts or folders cannot be restored. They are permanently removed from the platform.

The "hide/delete" option is only visible to you *[see figure 9, p. 24]* if you have the permission to delete and/or hide the fact you are viewing.

In order to use one of the delete options described above, read through the following instructions.

18.1. Delete shortcuts

A shortcut is a link which points to a fact (see chapter <u>16.2 Create shortcuts</u>, p. 45). If you delete a shortcut, the original fact remains stored in the respective service filing (see chapter <u>6. Design of the system</u>, p. 12). The original fact is still searchable with "Factlist & Search" (see chapter <u>24. Factlist & Search</u>, p. 66).

There are two different possibilities to delete a shortcut:

A) in the Structure

In order to delete a shortcut in the Structure, proceed as follows:

(1) Open the folder where the shortcut you want to delete is located.

(2) Search for the shortcut in the list. Click on the "delete"-button in the respective row *[see figure 26]*.

figure 26: delete a shortcut in structure

(3) A new page will be loaded. Now, click on the "delete"-button in order to start the deleting process *[see figure 27]*.
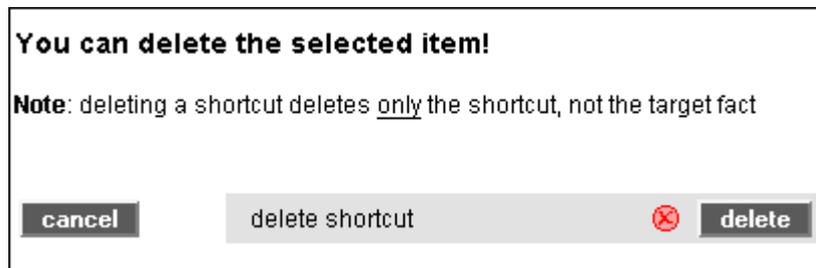
figure 27: delete shortcut

(4) Again, click on the "delete"-button or click on "cancel".

(5) The shortcut is now deleted. The original fact is stored in the respective service filing.

B) in the metadata

In order to delete a shortcut, proceed as follows:

(1)   Open the fact of which you want to delete the shortcut.

(2)   At the bottom of the fact is the metadata. There you can see which shortcuts have already been created for the respective fact *[see figure 28]*.

figure 28: shortcut metainfo

(3)   Click on the "delete"-link next to the shortcut you want to remove
        [see figure 28].

(4)   A new page will be loaded. Now, click on the "delete"-button in order to start the deleting process *[see figure 27]*.

(5)   Either confirm the deleting process or click on "cancel".

(6)   The shortcut is now deleted. The original fact is stored in the respective service filing.

18.2. Hide content

The "hide" option is only visible to you *[see figure 9, p. 24]* if you have the permission to hide the fact you are viewing.

Hidden facts are not displayed in the service filings (see chapter 6. Design of the system, p. 12), in the Structure (see chapter 6.1. Structure, p. 13) or in Factlist & Search (see chapter 24. Factlist & Search, p. 66). However, links to hidden facts remain intact. Hidden facts are accessible via infoID.

> **i** Shortcuts (see chapter 16.2 Create shortcuts, p. 45) and folders can only be deleted.

In order to hide a fact, proceed as follows:

(1) Open the fact you want to hide.

(2) If you want to access the hidden fact later on, it is advisable to write down the infoID (see chapter 9. Meaning of the infoID, p. 29).

(3) Click on "delete" in the left column *[see figure 29, p. 55].*

(4) Click on "hide" *[see figure 30, p. 55]*.

> **i** In order to undo the hiding of a fact, you have to publish a new version.

18.3. Unhide content

(1)   Open the hidden fact by inserting its infoID in the address line of your web browser *[see figure 13, p. 29].*

(2)   Click on "edit" in the left column.

(3)   If you want to, you can edit the information of the hidden fact. However, you do not need to change anything.

(4)   Click "next >>".

(5)   Set permissions.

(6)   Click on "preview". If you want to change anything click "edit" again otherwise click "publish".

The hidden fact is now visible again. It can be viewed in Factlist & Search (see chapter 24. Factlist & Search, p. 66) as well as the respective service filing (see chapter 6. Design of the system, p. 12).

18.1. Delete content

You cann either delete <u>all or individual versions</u> (see chapter <u>10. Version control system</u>, p. 30) of a fact. A deleted fact cannot be restored.

> ⓘ facts with guarantee of existence cannot be deleted (see chapter <u>7.1. Guarantee of existence</u>, p. 25). You have the possibility to hide these facts (see <u>18.2. Hide content</u>, p. 53.

In order to delete a fact, proceed as follows:

(1) Open the fact you want to delete and click on "delete" in the "edit functions" box in left column *[see figure 29]*.

figure 29: edit functions box

(2) You are offered two options. Choose "delete" to start the deleting process *[see figure 30]*.
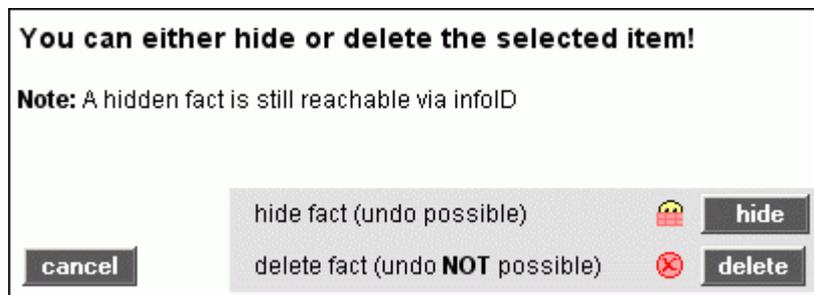
figure 30: delete fact

(3) You can now check your deletion request on the confirmation page *[see figure 31]*.

figure 31: delete - confirmation page

(4)   If the fact has more than one version, you will see a list with all versions. Choose from the list which versions you want to delete as well *[see figure 31]*.

(5)   Click on "delete". A successfull deletion will be confirmed with "You have sucessfully deleted the following fact: *[infoID]*".

Part III: Functions & Services in detail

19. Forum

In a Forum, you can post statements in structured, question-answer lists. You can create an indefinite number of forums. A forum is divided into three structural levels. This allows the best possible structuring of the discussed topics:

Forum	Title of the main topic with short description
Topics	Division of the main topic into sub-topics
Messages/Postings	Individual messages

19.1. Create/edit a Forum

In order to create a Forum click on "add Forum" on the left side. Fill out the input mask for the main topic (first level). If you are satisfied with the "preview" of the text, don't forget to click "publish". Then you can create topics.

> The text of the main topic (Forum) can be changed at any time. The topics and the postings can only be edited as long as nobody else has read them.

19.2. Create topics

You can create specific topics in your forum to be discussed by users.

If you want to create a topic, proceed as follows:

(1) Click on the title of a Forum.

(2) You will see a small input mask at the bottom of the page.

(3) Enter a title and a text.

(4) Click on "preview".

(5) Now, you can check your entries. If you want to change anything click on "edit".

(6)   Click on "publish".

As long as no other users have read the new topic, you can still edit the topic by clicking on the "edit text" link on the right.

19.3. Create Postings

Replies/answers to a topic are called "postings".

If you want to reply to a topic and/or posting, proceed as follows:

(1)   Click on the title of the topic/posting, to which you want to reply (refer) to.

(2)   At the end of the page appears a reply input mask.

(3)   Enter a title and a text.

(4)   Click on "preview" to check your entry.

(5)   If you want to change anything, click "edit".

(6)   Finally, click on "publish".

As long as no other users have read your posting, you can still edit it by clicking on the "edit text" link on the right.

> ⓘ The reply form is not visible, if you have chosen the display setting "show all items full texts".
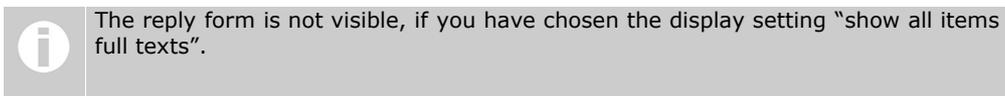
19.4. Hide topics/postings

Creators of a Forum and write-permitted users can hide individual topics and/or their corresponding postings. In order to do so, click on the "hide"-link next to topic or posting.

19.5. Read messages in a Forum

Forums and topics in a forum are viewed in listform. On the left side, you see the title of the forum or topic. On the right side, you see additional information in form of icons (author, number of topics and postings, date of the last posting). By clicking on an icon you can sort the list (eg. sort according to author).

Postings are displayed differently. A user can switch between different view modes. In the beginning, all titles of postings are displayed in a tree structure showing the question-answer relations between postings. Once you click on the title of a posting, the respective text opens. If you click on the title of another posting, the previous text is closed and the new one is displayed.

In the left column are different options for viewing postings *[see figure 32]*.

figure 32: Posting - View options

If you want to display all postings at the same time, click "all items full texts." In order to switch back click "selected item's text" (both links change depending which option is active). Furthermore, you can highlight postings according to when they have been published. Select an option from the drop-down menu "created during last". Additionally, you can highlight unread entries by clicking on "unread entries".

20. factchat

In the factchat (synchronous communication), you can have simultaneous discussions with other users (chat). There is always only one factchat per platform. Click on the factchat link in the dialog area. A Java applet will load.

Technical requirements for factchat

You will require a java-enabled web browser in order to be able to initiate a factchat session. Normally, there shouldn't be problems starting factchat. In case there are, please check your browser settings:

MS Internet Explorer	Select „Internet Options" from the „Tools" menu of your browser. Then click the "Advanced" tab. From the long list of options that follow, find the heading, "Microsoft VM", and select "JIT compiler for virtual machine enabled." Save the settings by clicking "OK". Then, close all Internet Explorer windows and restart the browser.
Netscape Communicator	Click „Preferences" from the „Edit" menu of your browser. Then, click the "Advanced" tab and select "Enable Java". Save your new setting by clicking "OK". Then, close all Netscape windows and restart the browser.

Should there still be problems, please read through the information posted on our factchat customer platform at http://factchat.kundenplattform.com/118449.0

Login and color-selection

When you start the factchat, a Java applet opens, with a selection of chatrooms. If only one single chatroom is offered, the color selection appears immediately. After you have selected a color, the chatroom opens, and you can start the chat session.

Chat – write messages

You are in the „chat-mode" which enables you to post messages. In order to post, you have to click anywhere within the gray area (input window). The text input cursor appears and you can type your text message. Before you press the enter key, use your mouse to move and position your text anywhere on the chat board. Fix the position of your message on the chat board, by pressing the enter key.

Orientation and clarity

In order to distinguish between old and new messages, old messages will start to fade and eventually disappear into the background. Subsequently, recent messages are most clearly visible. With the help of the "Zoomer" (on the left side next to the chat board), you can choose the maximum of messages to be displayed at the same time.

You can find more information on our factchat customer platform:
http://factchat.kundenplattform.com/115525.0

21. Email notification

The email notification informs users about changes on the platform. This way users do not need to search for changes themselves. The level of detail of the automatic email notification can be adjusted on different levels:

1) **Folders (Structure):** notification if there is a change in particular folder(s).

2) **Service:** notification about changes in all facts of a particular service.

3) **Forum:** the notification selection can also be limited to individual forums.

In order to receive notification emails, certain changes must be made in the „Settings" (see chapter 4. Registration/login – user settings/password, p. 6).

There are two ways of getting to the Notification Settings interface

way 1 - through the main menu

(1) After you have logged in, click on "Settings" (in the main menu). The link "General settings" is on the left side. Here you have to adjust:

- Whether you want to receive self-defined email notifications.

- Whether you want to receive the notifications, as defined by the pAdmin.

- In what format (HTML or plain text) you want to receive the email (some email programs cannot display the HTML format)

- In what time intervals you would like to be informed about activities on the platform.

Select the desired preferences and click on the "Save" button.

(2) Afterwards you have to indicate,for which areas you would like to receive automatic email notification. Click in the options area (left frame) on the link "advanced notifications". You see an overview of all services on the platform *[see figure 33].*

figure 33: Notifiaction overview

The yellow marks show the areas that have already been preselected by the P-Admin. You can select additional areas. For Services that are underlined, you   can go into more detail. To do that, click on the link.

Way 2 - through the individual services

No matter in which service you are at the moment, on the left side there is a "Notifications" box (If you have opened an input mask, you cannot see it).

figure 34: Notification link for a service

You can decide directly, whether you want to be informed about changes

▪ on the whole platform, or

▪ in the service you are currently in

Do not forget to check your "General settings". Here you give all details for the automatically sent notification emails. In "go to advanced notifications" you will get a summary of your choices which you can also adapt if necessary.

22. Slideshow (Album)

The service Slideshow allows you to present a large amount of pictures in a demonstrative way. Each picture can be commented on. Furthermore, various display options are offered (thumbnail-preview, zooming, scrolling).

step 1 – create a slideshow

At first, you define the title and the start picture (thumbnail) of the slideshow (album). Album pictures are uploaded in step 2.

(1) Click on the link "create new slideshow here" in the options area on the left side.

(2) Fill out the fields of the Input Mask. In the field "starting picture" enter the file data of the starting picture (the maximum size of the starting picture is 80 x 64 pixels).

(3) Click on "next >>" to continue.

(4) Set the permissions.

(5) Click on "preview >>".

(6) If you want to change anything click "edit" otherwise click "publish".

step 2 – add pictures

You can either upload several **images** (maximum 50) at the same time via a zip file, or upload them individually one by one.

a) multiple image upload

You have already put your images in one single zip file. Please make sure that your zip file meets the requirements listed below! Title and description for each image are set after the uploading process. Please be patient, the uploading process can take some time.

(1) Open the album you created in step 1.

(2) Click on "upload multiple slides" in the options frame on the left side.

(3) Enter a title and description if you want to.

(4) Enter the file data of your zip file by clicking on "browse".

(5) The field "scale to/if one size more than" allows you to indicate which image height and/or width should not be exceeded (640 pixel is recommended).

Requirements for the zip file:

Use only image files of the format "gif", "jpg" or "png". Images bigger than 1 mb (megabyte) will not be uploaded. Zip files containing more than 50 images are rejected by the system. The zip file MUST NOT contain any folders!

b) Upload one single picture

(1)   Click on "add a single slide"

(2)   Fill out all fields.

(3)   Continue by clicking on "next >>".

(4)   Set the permissions for this image. You will be offered a pre-selection which corresponds to the one indicated previously for the slideshow (album) itself. You can assign different permissions for individual pictures if necessary.

(5)   Click on "preview >>".

(6)   If you want to change anything click "edit" otherwise click "publish".

23. Creating/Editing Partners

If necessary, the service „Partner" can be activated. This service describes a small window in your header in which logos of business partners or other acting parties on the platform change continuously at frequent intervals *[see figure 35]*.

figure 35: partner window in the header

In order to create a partner slideshow for your header, proceed as follows:

(1)   Upload all logos to the platform using .gif-format (see chapter   12. Integrate pictures, p. 36). The logos must be 80 x 64 pixels in size.

(2)   Click on the partner in the header on the right side.

(3)   Click on „add partner" on the left side. There you can insert the infoIDs of the logos you have uploaded in step 1. If necessary, you can submit further information by filling out the „Description" field for the partner (e.g. Internet address of the homepage).

24. Factlist & Search

"Factlist & Search" offers an advanced search function as well as filter and order possibilities. Moreover, you can create new facts by clicking on "create new fact" on the left side. This is a major advantage, in case you do not want the separate services to be shown in the main menu in the header.

24.1. List factlist

If you do not enter a keyword in the search input mask *[see figure 36]* and select a fact-type from the drop-down menu, all facts of the fact-type (eg. text) will be listed.
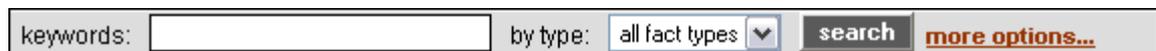
figure 36: factlist Input mask

24.2. Search function

Enter a keyword and choose (optional) a fact type. If you click on "more options", you can limit your search *[see figure 37]*. For example: Should your keyword be searched in the title, text or author field? Is the publication date of any importance? Do you want to list only your facts? Do you want to limit the search to published facts?
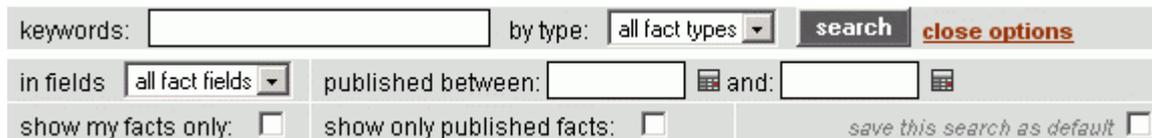
figure 37: Search-input mask

The small checkbox next to the search button allows you to set your search query as standard. Afterwards the search query will always be shown automatically when you click on "Factlist & Search".

24.3. Result list

After you have clicked on the search-button, a list of results is generated *[see figure 38]*.

figure 38: list of results (all facts ordered by infoID)

The view of list of results can be adapted. In the left column, you can define the number of items to be displayed on one page. Below the search input mask, you can swith to other pages. The list of the search results can be sorted by each column (eg. fact-type, title, author, infoID, publication date). In order to do so, click on a column title.

24.4. Create a new fact

If you are authorized, you see the link "create new fact" on the left side *[see figure 38]*. By clicking on the link you can create any type of fact (text, event, news, etc.). For further information see chapter 6. Create Content, p. 17.

25. HTML Tips and Tricks

This chapter deals with basic HTML instructions for formatting text in text- and html-mode. If you want to learn more about this topic, we recommend the web site www.teamone.de/selfhtml.

25.1. General HTML Information

HTML is the abbreviation for „Hyper Text Markup Language". HTML is the format in which text and hypertext information is transmitted and saved in the World Wide Web (WWW). In the WWW you can't create layout for a text, as you would in Microsoft Word. Unfortunately, it is not that simple. You have to use HTML instructions ("tags") to arrange pieces of text on a webpage. These so-called tags are different from normal text. They are always surrounded by angle brackets eg. <xxx>

Most HTML instructions come in pairs. You need a „start-tag" eg. <xxx> and an "end-tag" </xxx>. The tag pairs describe the layout of the text in between. For instance: A text between and will be bold.

Some HTML instructions do not have an end-tag. They usually describe elements between pieces of text eg. <hr> inserts a line between two paragraphs.

Paired HTML instructions have to be entered correctly. This is illustrated by the following example using indented input lines. What the individual tags mean can be read in chapter .

```
<p>    The first paragraph.
</p>
<p>    Two
<u>
<b>    underlined, bold
</b>
</u>
Words in the second paragraph.
</p>
After this paragraph comes a line:
</p>
<hr>
<p>    That is the last paragraph.
</p>
```

All tags sometimes include additional attributes:

```
<div align="center">Everything centered</div>
```

align="center" positions the text in the middle (center justified). "align" stands for "alignment".

25.2. Formatting Text

Bold type:	`<b>bold words</b>`
Preview:	**bold words**

Underlined:	`<u>underlined words</u>`
Preview:	<u>underlined words</u>

Italics:	`<i>italic words</i>`
Preview:	*italic words*

Word wrap:	`Text first row Text second row`
Preview:	Text first row Text second row

Paragraph:	`<p>Here begins a paragraph, and here it ends.</p>`
Preview:	Here is a very simple sample text which serves to fill two rows. Here begins a paragraph, and here it ends. Here is yet another very simple sample text which serves to fill two rows.

Lines between two paragraphs:	`First paragraph <hr> second paragraph after the line.`
Preview:	First paragraph ——————————————— Second paragraph after the line

Unordered lists (Bullets):	``` - List entry - List entry ```
Preview:	• List entry • List entry

Ordered lists:	``` - List entry - List entry ```
Preview:	1. List entry 2. List entry

Text alignment:	``` Everything centered Everything left justified Everything right justified justified text justified text justified text justified text justified text justified text ```
Preview:	Everything centered Everything left justified Everything right justified justified text justified text justified text justified text justified text justified text

Font size	``` Normal text Text with font size 12pt <span style="font-size:8pt">Text with font size 8pt ```
Preview:	Normal text Text with font size 12pt Text with font size 8pt

25.3. Formatting Tables

Tables can be used to position texts and graphichs accurately next to each other. In this case, invisible tables are usually used.
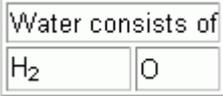

Invisible Tables	```html
	<html>
	<table border="0" cellpadding="2", cellspacing="5">
	  <tr>
	   <td>Text of the first column</td>
	   <td>Text of the second column</td>
	  </tr>
	</table>
	</html>
	``

Preview:	Text of the first column Text of the second column

The frame ("border") of the table is "0" which means it is not visible. "cellpadding" describes the space from the text to the cell frame. "cellspacing" describe the space between cells.

For further information see
http://selfhtml.teamone.de/html/tabellen/gestaltung.htm#abstand.

25.4. Format tables

| Connected cells | ```html
<html>
<table border="1">
 <tr>
  <td colspan="2">Water consists of</td>
 </tr><tr>
  <td width="">H<sub>2</sub></td>
  <td>O</td>
 </tr>
</table>
</html>
``` |
|---|---|
| Preview: | Water consists of
H_2 O |

| Cells with size specifications | ```html
<html>
<table width="400" cellpadding="2" cellspacing="5">
   <tr>
    <td width="100">Text of the first column, that
now is reduced to 100 pixels.</td>
    <td width="300" valign="top"><span
style="color:#000099">Text of the second,
substantially wider column (300 pixels), in which
now appears the essentially longer, colored
text.</span></td>
   </tr>
</table>
</html>
``` |
|---|---|
| Preview: | Text of the first column, that now is reduced to 100 pixels   Text of the second, substantially wider column (300 Pixel), in which now appears the essentially longer, colored text. |

25.5. Special Characters

Some characters belong to the HTML-syntax and are automatically interpreted by the system instead of being displayed. In case you want these characters to be displayed as normal text you have to use the <text>-tag.

Special characters within text:	Here I want to display an example of HTML-Code as normal text: <text>This is the way of writing bold text</text>
Preview:	Here I want to display an example of HTML-Code as normal text: This is the way of writing bold text

Blank-Code

When you create „invisible tables" you will use empty cells more frequently. In order to fix the size of the cell, it is helpful to enter a blank code in the cell: "` `" or "` `"

25.6. Colors

Basically there are two possibilities of defining colors in HTML:

- by indicating the RGB value of the desired color in hexadecimal (RGB = Red/Green/Blue value of the color)

- by indicating the name of a color

The advantage of using the hexadecimal number system is that it works independently from the browser.

If you enter the color name, you circumvent the somewhat difficult definition of a color in hexadecimal mode. At present however, only 16 colors are officially standardized. More colors exist, but this depends on the used browser.

hexadecimal-color values
In the Hypertext Markup Language, the color for a page background or text font is specified by an RGB value, expressed with six digits in hexadecimal format. An RGB value in hexadecimal format consists of "#" followed by 6 digits. The first and second digits represent the red level, the third and fourth digits represent the green level and the fifth and sixth digits represent the blue level.

Allowed hexadecimal numbers are: 0,1,2,3,4,5,6,7,8,9,A,B,C,D,E,F. This means there are 16 possibilities for one hexadecimal number. As each color value (red, green, blue) is defined by 2 numbers there are 256 available variations for one color value (16 x 16). Thus, the total number of available colors is 16,777,216 (256 x 256 x 256)

Example of colored text with RGB values

HTML-Code:	```red words```
	```blue words```
	```green words```

Preview:	red words blue words green words

Color names of the 16 basic colors

In order to define a color with the help of a color name, simply enter the desired color names in place of the RGB value. The following color names have been a component of HTML since version 3.2 and are understood by many web browsers.

Color Name	Hexadecimal Value	Color Name	Hexadecimal Value
Black	#000000	gray	#808080
Maroon	#800000	red	#FF0000
Green	#008000	lime	#00FF00
Olive	#808000	yellow	#FFFF00
Navy	#000080	blue	#0000FF
Purple	#800080	fuchsia	#FF00FF
Teal	#008080	aqua	#00FFFF
Silver	#C0C0C0	white	#FFFFFF

Example of colored text with color name

HTML-Code:	`<span style="color:red">red words</span>`
	`< span style="color:blue">blue words</span>`
	`< span style="color:green">green words</span>`

Preview:	red words blue words green words

25.7. Reference to an email address

You can create a reference to any email address within a text. If the user clicks on the reference, his email programme (eg. Microsoft Outlook) open automatically. The email adress will be automatically inserted in the recipient field.

HTML-Code:	Please send any questions to the following email address: br> max.muster@test.org
Preview:	Please send any questions to the following email address: max.muster@rest.org