

A large, thick, light blue circle is centered on the page. It is partially overlaid by a thin blue line that starts from the top left and extends towards the top right, and another thin blue line that starts from the bottom left and extends towards the bottom right. The text "P-Admin manual" and "for platforms of the factline Community Server" is centered within this circle.

P-Admin manual

for platforms of the factline Community Server

Version: May 2006

Welcome to the training for platform administrators of the factline Community Server

The aim of this manual is to describe the tasks of a platform administrator ("P-Admin") on the factline Community Server and his/her responsibilities. All steps are illustrated with screenshots. You will find tips and tricks for the initial set up as well as for continuous improvement of your platform.

Throughout the manual, additional information is displayed in grey boxes:



The FCS is improved continuously! Subsequently, the manual is updated at frequent intervals. A version of this manual is available for download on our information platform at <http://fcs.kundenplattform.com/115873.0>. However, we recommend the online texts on our information platform as they are always up to date. Moreover, a support forum and a search option are at your disposal.

Further services offered by factline:

- **Support:**
During the first stage, we offer to take on the tasks and functions of the platform administrator.
- **Consulting:**
We offer advice on how to structure your platform and how to build up a community.

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Introduction

1. Division of roles between the S-Admin, P-Admin and Users

During the first stage of the construction of an FCS-platform, the platform administrator (henceforth referred to as "P-Admin") plays an essential part.

Before we take a closer look on the individual features and options, it is important to understand the hierarchical relation between the system administrator ("S-Admin"), the platform administrator ("P-Admin") and the users ("User").

Platform administrators are in the middle of the hierarchy between the S-Admin and the users.

The functional hierarchy can be illustrated by using an analogy of the construction and use of a house:

- The purchaser (designer) decides 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, sets the password for each user, and structures the arrangement of the house (the organisation of content on the platform).
- A few users visit the house while others live in it permanently. The inhabitants have different keys which grant them access to different rooms. In accessible rooms, they help to add, change or remove furniture (content). Doors for which inhabitants do not have access keys are not visible to them.

1.1. System administrator ("S-Admin")

If the FCS is leased (ASP-Model), factline takes over the tasks and responsibilities of the S-Admin. If the FCS is purchased and runs on a server of the customer, the customer himself is the S-Admin and performs all his tasks.

The first task of the S-Admin is to set up the platform, which includes:

- deciding on a name for the platform (appears in the header) eg. "eurocare 2000"
- defining the domain name eg. <http://eurocare.factlink.net> (= subdomain of factline) or www.eurocare2000.org (= domain of the customer).
- selecting one or more platform administrator(s)
- enabling the desired services (text, news, chat...)



Forms of use: ASP or self- installation

FCS is offered as an ASP (Application Service Providing) solution. This means the server is located at factline, and the tasks and responsibilities of the system administrator are taken over by factline.

The system can also be installed on a server of the customer. In this case, the customer is the system administrator.

1.2. Platform administrator ("P-Admin")

After the initial set up of the platform by the S-Admin, it is the P-Admin's turn. At this point, no one can put content on the platform yet, not even the P-Admin himself.

First, the P-Admin has to determine, as already mentioned above, the "house rules" (Which groups are there? Who is permitted to read/create content?) and distribute the access keys to the users (assign users to different groups). Afterwards, the P-Admin arranges the organization of the house (= the organisation of content on the platform), by creating folders and texts accessible to certain groups.

The tasks and responsibilities of the P-Admin are described in detail in the next part of the training manual.



Registration of the P-Admin

A future platform administrator has to register like all normal users. Afterwards the S-Admin of the new platform can define users as P-Admins. The future P-Admin is not always required to newly register on the new platform. It is sufficient if he/she has registered on any platform on the FCS (eg. on the test platform for users <http://test.kundenplattform.com>).

1.3. Users

Users have different rights depending on the group(s) they are assigned to and the permissions these groups have been granted. In general, a user can only see services and content for which he/she has been authorized.

A user can:

- register
- change his/her settings (address, telephone number, photo, password,...)
- order automatic email notification about changes on the platform
- view content (The permission system controls who sees what.)
- create content (The permission system controls who is able to create content.)
- link pieces of content with each other
- change content (The permission system controls who is able to edit content.)
- delete content (The permission system controls who can delete what.)
- set permissions for new or edited content



Permission system

A user sees the groups the P-Admin has defined and can decide which groups he/she would like to grant read/write permissions for his/her content. However, a user cannot add his/her own groups.

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

Part I: Features and interface of the P-Admin

2. Responsibilities of the P-Admin

After the S-Admin has completed the initial set up of the platform, according to the customers' specifications, and linked it with the desired Internet domain (<http://xxx.factlink.net>), he/she turns the platform over to the platform administrator.

At this point, no one can create content on the platform, not even the P-Admin, because no permissions have been assigned yet. Users can only register and change their settings.

In this initial phase, the P-Admin has to:

- create groups (eg. customers, project group, internal administration,...)
- assign registered users to groups
- assign permissions to groups: Which group(s) should have access to certain services? Which group(s) should be allowed to create content on the highest level in the structure hierarchy? Which groups should be allowed to read, create content by default?
- structure the content on the platform (create folders,...)
- create a start page
- adapt e-mail templates (texts for the registration and the notification e-mail)



If desired, factline can support you in the beginning as a P-Admin

factline can take over the tasks of the platform administrator in the beginning. In addition, we offer advice on how to organise a platform.

As soon as the initial phase has been completed, users can create and view content, get into contact with other users (ping, chat,...) - provided they have been granted permission to do so.

As concerns the maintenance of the platform, the P-Admin has to:

- manage users and user groups
- analyze statistical data
- edit the start page when necessary

3. Access to the P-Admin interface

The P-Admin has its own interface for conducting any tasks necessary. Required are simply an Internet connection and a standard web browser (Microsoft Internet Explorer, Mozilla Firefox,...).

In order to access the P-Admin interface, proceed as follows:

- [1]** Enter the URL **http://padmin.factline.com** into the address bar of your browser.
- [2]** Enter your user name and password [see figure 1], and click on "Login >>".

figure 1: Login P-Admin

- [3]** Select the desired platform from the list, and click on the modify-button on the right side (Usually, only one platform is displayed.).
- [4]** Now the main page (General Info) of the P-Admin interface opens. The main page gives you an overview [see figure 2] of your platform.

Platform Administrator Interface Platform: factline community server platform list | Select platform: factline community server (101) | Logout

Logged in as: factline

- o General Info
- o Groups & Users
- o Services
- o Interface
- o Messages
- o Meta info
- o Statistics

help ?

Print this page

General platform information

Platform title:	factline community server
Creation date:	14 Mar 2001 12:33
Platform admins:	Hella, maxharn, sebastian, ignis, AstridH, mhuber, padminpauli, factline
Total number of facts:	4365
Activity for last month:	1340 changes
Latest change date:	15 Feb 2006 18:52
Logins last 1 month:	115 log-ins

Platform specific groups:

fcs_admin	- für den inhalt verantwortliche
developers	- Entwickler (factline)
fcs_platform_main	- platform main group
gf_factline	- gesellschafter der factline Webservices GmbH
P-Admin Kunden	- AdministratorInnen von FCS-Plattformen
Partner	- Partner, die Content erstellen

System groups:

universe	- any unregistered or registered user
----------	---------------------------------------

Total users on platform: 256

UserID	Username	First Name	Last Name	Registration date
6	l.lausimausi	Klaus	Ita	12 Mar. 2001
667	factline	factline	Webservices GmbH	23 Feb. 2001

figure 2: P-Admin interface (General Info)

4. Navigation in the P-Admin interface

There are several possibilities for navigating in the P-Admin interface [see figure 3]:

- **main menu:**
Here you see the areas where you can make all necessary adjustments.
- **pathline:**
The pathline shows your present location in the sub-menus.
- **exit:**
Do not forget to log out after you have finished working on the platform. Use the drop-down menu to switch between platforms.

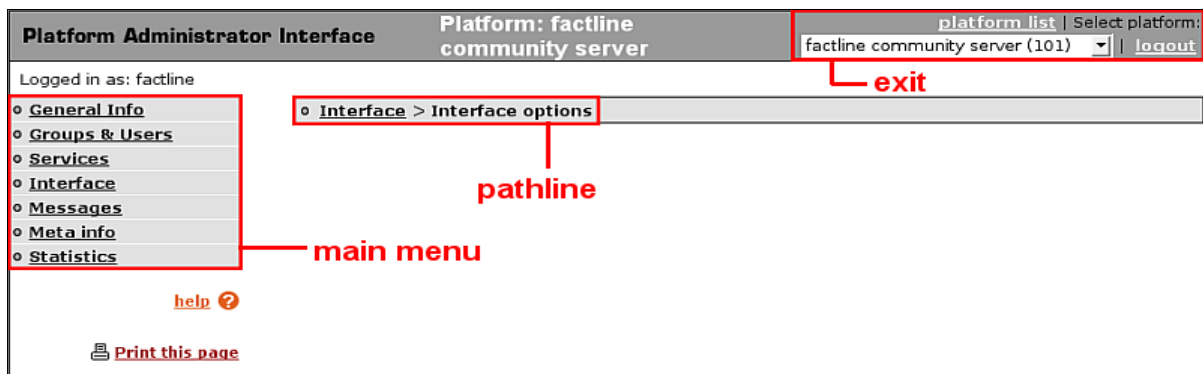


figure 3: navigation in the P-Admin interface

Below the main menu, there is a **help button** [see figure 3]. If you click on the help button, a pop-up window with information about the area you are working in opens.

Part II: Configuration of the platform

5. User groups – general information

If factline has not done initial adjustments, your platform is still empty. Nobody can create content, because permissions have not been assigned yet. As permissions are assigned to groups, the very first step is to create user groups.



Authorize individual persons

Permissions can either be assigned to groups or to individual persons. Please note, that the distribution of permissions to individual persons may soon result in a loss of overview!

The following system groups are automatically available on your platform:

universe: Everyone. That is to say users who are logged in and users who are not logged in. (It is not possible to assign users to this group. Therefore, you do not see it in the group overview of the P-Admin interface.)

[Platform] Main Group: Each user who registers on your platform is automatically added to this group. The name of your platform is automatically assigned to the group name eg. "my platform main group". The name can be adapted by the P-Admin.

The following system groups are used on few platforms:

guests: Users who are not logged in.

users: Users who are registered on any FCS-platform.

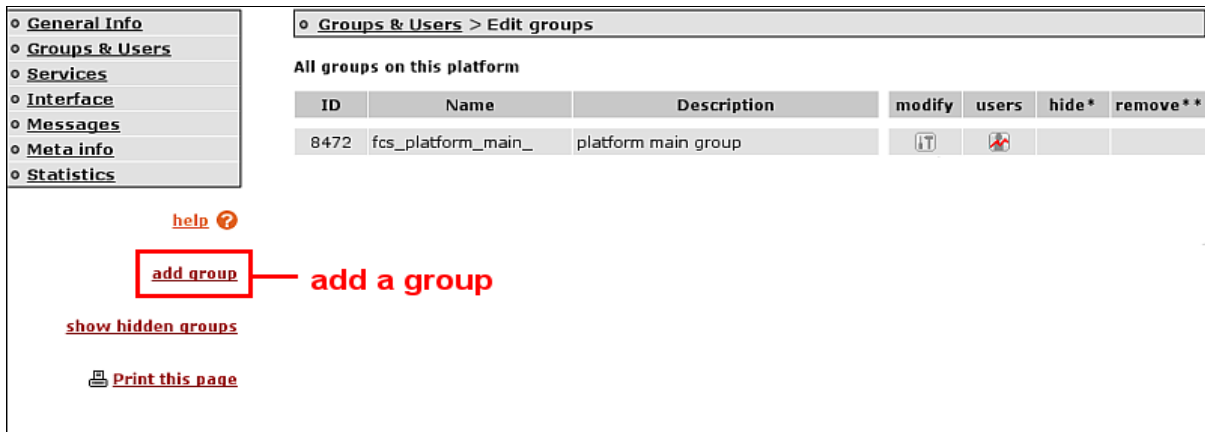
5.1. Create groups

In addition to the pre-defined system groups, you can create your own groups at any time. However, it is recommended to give the group structure a lot of thought at the very beginning. Major changes in the group structure may result in a huge amount of additional time and effort.

We recommend to create a group called "Admin" first. You should assign yourself to this group and provide it with write-permissions for all services (see chapter [6. Assign service permissions](#), S. 22).

In order to create groups, proceed as follows:

- [1]** Choose "Groups & Users" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Editing groups".
- [3]** Now, you see a list of groups which you can edit (Please, note: You cannot edit the system groups "universe", "guest", "users".) In the beginning, only the "platform main group" is listed. Click on "add group" on the left side [see figure 4].



The screenshot shows the 'Groups & Users > Edit groups' interface. On the left is a navigation menu with options: General Info, Groups & Users, Services, Interface, Messages, Meta info, and Statistics. The main content area is titled 'All groups on this platform' and contains a table with the following data:

ID	Name	Description	modify	users	hide*	remove**
8472	fcs_platform_main_	platform main group				

Below the table, there is a 'help' link with a question mark icon, a red-bordered 'add group' button with a red arrow pointing to the text 'add a group', a 'show hidden groups' link, and a 'Print this page' link with a printer icon.

figure 4: add a group

- [4]** An input form opens [see figure 5].

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. Select those users which should become members of the group.

Group name (title)


The group name must be more than 3 and less than 30 characters.

Description (max 250 chars)


Users:

<input type="checkbox"/>	Gamsrieglera	Angela Gamsriegler
<input type="checkbox"/>	sebastian	sebastian udulutsch
<input type="checkbox"/>	factline	factline factline Webservices
<input type="checkbox"/>	gamsrieglera	Angela Gamsriegler
<input type="checkbox"/>	AstridH	Astrid Holzhauser

figure 5: create a new group

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

- [5]** In order to finish adding the group click on "Create group" below the input mask. In order to stop the process, click on the "Cancel"-button.

 **What are the groups, added by the P-Admin, for?**
The P-Admin assigns access permissions for services to groups (see chapter [6. Assign service permissions, S. 22](#)). In addition, users decide which groups should be allowed to read and edit their content during the process of publication (see chapter [6. Assign service permissions, S. 22](#)).

5.2. Shared groups

Usually, permissions are assigned to groups (see chapter [5. User groups – general information](#), p. 11).

Platform administrators can either create their own individual groups or use existing groups from other platforms. In order to use an existing group from a platform on another platform ("concomitant platform"), the S-Admin needs to make some settings.

Shared groups differ from individual groups in the following points:

- In the interface area "Groups & Users" > "Editing groups":
 - The group title of shared groups is written in italic letters in the interface of the concomitant platform.
 - In the concomitant platform, P-Admins are able to remove shared groups from their platform. This does not affect the original platform or any other concomitant platform.
 - It is not possible to hide or unhide shared groups on concomitant platforms.
 - Title and description of shared groups are only changeable in the original platform.
 - Users can only be removed from shared groups on the original platform. In this case, the P-Admin of the original platform needs to be contacted.
 - Users can be added to shared groups on both, the original and the concomitant platform. [This is essential! Otherwise users of the concomitant platform would need to register on the original platform as well.]
- In the interface area "Groups & Users" > "Automatic group assignment":
 - Shared groups are displayed in the interface for automatic group assignment.
- In the interface area "Groups & Users" > "All groups & users":
 - Shared groups are not displayed in the interface "All groups & users". [Otherwise, you would have to list users which are not registered on the concomitant platform but on the original platform.]

5.3. Order groups

Users are asked to set permissions during the publication of facts. After they have clicked on "Next >>" in the input mask, an overview of groups is displayed [see figure 6].



figure 6: group overview

The order in which the groups appear in the group overview can be determined by the P-Admin.

In order to order groups, proceed as follows:

- [1] Choose "Groups & Users" from the main menu by clicking on it.
- [2] Click on the "modify"-button in the row "Editing groups".
- [3] Now, you see a list of all available groups [see figure 7].


ID	Name	Description	modify	users	hide*	move
70006	main group	main group				
70016	Admin	Admin				
70017	Lehrende	Lehrende				
70018	Studenten	Studenten				

figure 7: order groups

- [4] Highlight the group you want to move. In order to do so, click on the radio button next to the respective group.
- [5] Decide above which group you want to move the highlighted group. Then, click on the arrow in this row.
- [6] Repeat steps 4 – 5 until you are satisfied with the result.

5.4. Add users to one group

In the course of time, more and more users will register on your platform. These users are automatically added to the "platform main group". However, if required, they have to be assigned to additional groups.



How do I notice that new users have registered?
 The system can notify you via email as soon as a new user has registered. For further details, see chapter [11. Email templates](#), S. 35.

In order to add (new) users to one group, proceed as follows:

- [1]** Choose "Groups & Users" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Editing groups".
- [3]** Now, you see an overview of all groups. Click on the "Users" button next to the desired group [see figure 8].

ID	Name	Description	modify	users	hide*	move
70006	main group	main group				
70016	Admin	Admin				
70017	Lehrende	Lehrende				
70018	Studenten	Studenten				

figure 8: add users to one group

- [4]** Now, you see all users who are already in this group. Click on the "Add/search user"-link on the left side.
- [5]** You can search for one particular user, for all users who have not been assigned to this group or for all users. "Search for users" starts the search. [see figure 9].

Select search criteria:

Search keyword:

In field: User name
 First name
 Last name
 Full name
 First character of the username

Or list all users: all users not in this group
 all users

figure 9: search user

- [6]** You see a list of results. Users who match your search criteria but have already been assigned to the group, are highlighted with a green check. Click in the checkboxes of the desired user(s). Then, click on "add to group" [see figure 10].


Search results for **Boyan**

	<u>▼ UserID</u>	<u>Username</u>	<u>First Name</u>	<u>Last Name</u>	<u>Registration date</u>
<input checked="" type="checkbox"/>	667	<u>factline</u>	Boyan	Filipov	24 Mar. 2004
<input type="checkbox"/>	70011	<u>ignis</u>	Boyan	Filipov	14 Jul. 2004

pages: 1

Add selected users to this group: Admins

figure 10: add users to one group



Testuser for groups
We recommend to register testusers and to assign them to different groups. This way, you can verify what users of a particular group see (You can use the same email address several times for registration of testusers.).

5.5. Add users to several groups

Assigning users to groups via the interface "Editing groups" may eventually get troublesome. That is why there is the alternative interface "All groups & users". This interface offers an overview of all available groups and users of your platform.

In order to assign users to several groups, proceed as follows:

- |1|** Choose "Groups & Users" from the main menu by clicking on it.
- |2|** Click on the "modify"-button in the row, "All groups & users".
- |3|** Now, you see a table which shows all groups and users of your platform.

The following additional features support you in assigning users to several groups:

- repetition of the column "username":
If there are more than eight groups, the column "username" is displayed again.
- repetition of the column titles:
If there is a long list of usernames, the row showing the column titles is displayed again.
- information field:
If you point at a checkbox, an information field is displayed [see figure 11]. The information field shows you which user you would assign to which group with this checkbox.

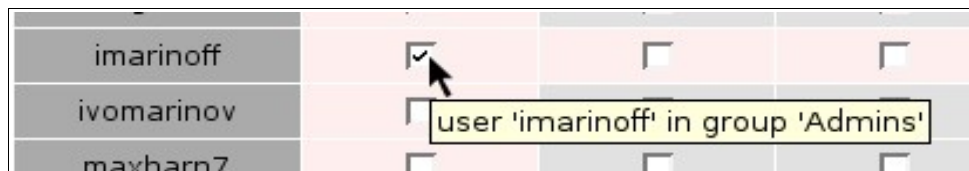


figure 11: add users to several groups

- |4|** Click on the respective checkboxes.
- |5|** Click on "Save changes" in the right corner.
- |6|** Now, you see a confirmation page showing your specifications.
 - |a|** The specifications are correct:
Click on "Save changes" in order to submit your changes.
 - |b|** The specifications are incorrect:
Click on "Cancel". The table will be reloaded and you will have to choose all checkboxes again.

5.6. Edit groups

You can change the title and the description of groups.

In order to edit groups, proceed as follows:

- |1| Choose "Groups & Users" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Editing groups".
- |3| Click on the "modify"-button, next to the group you want to edit [see figure 12].
















ID	Name	Description	modify	users	hide*	move
70006	main group	main group				
70016	Admin	Admin				
70017	Lehrende	Lehrende				
70018	Studenten	Studenten				

figure 12: modify group

- |4| Enter a new title and/or description for the group.
- |5| Click on the "Edit group"-button to save your changes.

5.7. Hide groups

If an existing group should not receive permissions anymore (eg. a project team which does not work together as a group anymore), you can hide it. The group will neither be visible to the P-Admin nor to the users anymore. Subsequently, the group can no longer receive permissions for content. However, hidden groups are not deleted which means that earlier granted rights will be maintained. In other words, users of hidden groups are still able to see content they have been authorized for earlier.



Is it possible to hide the "platform main group"?
 The "platform main group" cannot be hidden. The "hide"-option is only available for groups created by the P-Admin.

In order to hide groups, proceed as follows:

- [1]** Choose "Groups & Users" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Editing groups".
- [3]** Click on the "hide"-button [see figure 13] in the row of the group you want to hide.
















ID	Name	Description	modify	users	hide*	move
70006	main group	main group				
70016	Admin	Admin				
70017	Lehrende	Lehrende				
70018	Studenten	Studenten				

figure 13: hide groups

The group is immediately removed from the list and subsequently not displayed in the selection list. The P-Admin will not see hidden groups either.

If you want to unhide groups, click on "show hidden groups" on the left side. There you can again unhide the respective group.



Column "remove"
 Sometimes, you see a column with the title "remove". This column is displayed, when you share a group with another platform.

5.8. Advanced permissions

If required, permissions can be assigned to individual users instead of groups. In order to do so, you have to make some adjustments in the P-Admin interface. You have to determine which groups should be able to assign permissions to individual users.



Please note!

Using the "advanced permission" option may result in a huge amount of content which is not visible, editable, deletable by platform administrators.

In order to activate the option "advanced permissions", proceed as follows:

- [1]** Choose "Groups & Users" from the main menu by clicking on it.
- [2]** Click on the "perm."-button in the row "Advanced permissions".
- [3]** Now, you see a table with all groups and their users.
- [4]** Select groups or individual users by clicking in the checkboxes.
- [5]** Save your selection, by clicking on the "save the list"-button at the bottom of the table.

The groups/users you chose will now be able to assign permissions to individual users whenever publishing content [see figure 14].

Set group permissions for item:	read	modify
universe (1)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
users (2)	<input type="checkbox"/>	<input type="checkbox"/>
Testplattform (9779)	<input type="checkbox"/>	<input type="checkbox"/>
Mitarbeiter (9784)	<input type="checkbox"/>	<input type="checkbox"/>
Pauli (8272)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
sebastian (8264)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hella (8261)	<input type="checkbox"/>	<input type="checkbox"/>
maxharn (3110)	<input type="checkbox"/>	<input type="checkbox"/>

<< back publish >> preview >>

figure 14: advanced permission table

6. Assign service permissions

Platform administrators have to grant so-called access rights ("access-read") for each Service on the platform. The type of permissions sometimes vary depending on the Services. For content-services, "access-write" permissions are rather important, for instance.

6.1. Permissions for content-services

The P-Admin has to provide users with "access-write" permissions for content-services, otherwise they will not be able to publish content on the platform.

Moreover, so-called "standard" permissions can be defined. Standard permissions are used as a kind of recommendation during the publishing process. These recommendations are displayed in form of a pre-selection offered to users when it comes to assigning permissions during the publishing process.

In order to assign permissions for content-services, proceed as follows:

- [1]** Choose "Services" from the the main menu by clicking on it.
- [2]** Now, you see a list of all Services available on your platform. Choose a Service by clicking on the "perm."-button next to it.
- [3]** On the next page, all available user groups are displayed in rows. In the columns you see the permission settings [see figure 15].

"read" stands vor view, "write" for create and "modify" for edit.

access		standard	
read	write	read	modify

figure 15: permission settings

You need to assign "access" and "standard" permissions for each service by clicking in the respective checkboxes.

Read/write-permissions (access):

- "access + read": Defines whether a group has access to a service via the main menu (only applies to platforms with standard-header).
- "access + write": Defines whether a group is allowed to create a fact of the respective service.

Recommendation for permissions for all facts of the service (standard):

- "standard + read": As P-Admin, you suggest that users of this group should be provided with read-permissions.
- "standard + modify": As P-Admin, you suggest that users of this group should be provided with modify-permissions.

[4] Click on the "Set permissions" button at the bottom, to save your selection.

6.2. Example of content-service permissions

For better understanding, read through the following example of service permissions for the content-service "Image" [see figure 16].

Image		access		standard	
groupID	name	read	write	read	modify
1	universe	1 <input checked="" type="checkbox"/>	<input type="checkbox"/>	3 <input checked="" type="checkbox"/>	<input type="checkbox"/>
9779	Testplattform [main group]	<input type="checkbox"/>	2 <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9784	Mitarbeiter	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	4 <input checked="" type="checkbox"/>

figure 16: permission table

Read/write-permissions (access):

- "access + read": Only applies to platforms with standard header!
In this case, all registered and unregistered users ("universe") have access to the service "Image" via the menu bar.
- "access + write": The groups "Testplattform [main group]" and "Mitarbeiter" are allowed to create images.

Recommendation for permissions for all facts of the service (standard):

- "standard + read": If users do not adapt the pre-selection of permissions offered during the publishing process, all registered and unregistered users will be able to view the image.
- "standard + write": If users do not adapt the pre-selection of permissions offered during the publishing process, only users of the group "Mitarbeiter" will be able to edit the created image.



Explanation of FCS groups:

"universe":
users who are logged in and users who are not logged in

"platform main group":
all users who are registered on your platform

6.3. Services with different permissions

Some services have differing permission options.

A) Differing permission options for "Structure"

Here, you decide who is allowed to create folders and/or shortcuts in the most upper level of the structural hierarchy.

In order to set Service permissions for "Structure", proceed as follows:

- |1|** Choose "Services" from the main menu by clicking on it.
- |2|** Click on the "perm."-button next to "Structure".
- |3|** You will see a list of all available groups on your platform.
- |4|** Choose the desired groups by clicking in the checkboxes.

Read/write-permission (access):

- | | |
|-------------------|--|
| "access + read": | Only applies to platforms with standard header!
These groups have access to the Structure via the menu bar. |
| "access + write": | These groups are allowed to create folders/shortcuts in the most upper level in the structural hierarchy. |

Recommendation for permissions (standard):

- | | |
|----------------------|---|
| "standard + read": | As P-Admin, you suggest that these groups should be permitted to view folders/shortcuts. |
| "standard + modify": | As P-Admin, you suggest that these groups should be permitted to edit folders/shortcuts. |
| "standard + work": | As P-Admin, you suggest that these groups should be allowed to create shortcuts in the folders. |

- |5|** Save your settings by clicking on "Set permissions".

The permissions of the folders of the most upper level determine the permissions of the folders in the lower levels.

B) Differing permission options for "comment"

For the Service "comment", you need to determine which fact-types should be commentable.

In order to set Service permissions for "comment", proceed as follows:

- |1|** Choose "Services" from the main menu by clicking on it.
- |2|** Click on the "modify"-button next to "Factcomments".
- |3|** Choose which Services should be commentable [see figure 17].

Service	comments
texts	<input checked="" type="checkbox"/>
news	<input checked="" type="checkbox"/>
events	<input checked="" type="checkbox"/>
links	<input type="checkbox"/>
library	<input type="checkbox"/>
image	<input type="checkbox"/>
downloads	<input checked="" type="checkbox"/>
weblogs	<input checked="" type="checkbox"/>

figure 17: choose commentable Services

- |4|** Click on "save" to save your settings.

C) Differing permission options for "factchat"

The Service permissions for "factchat" greatly differ from the permission options of other services. There is no distinction between "read" and "write" permissions. Instead you only need to determine which groups have access to the factchat and all its functionalities.

In order to set Service permissions for "factchat", proceed as follows:

- |1| Choose "Services" from the main menu by clicking on it.
- |2| Click on the "perm."-button next to factchat.
- |3| You will see a list of all available groups on your platform [see figure 18].



figure 18: permissions factchat

- |4| Choose the groups who should be able to use the factchat.
- |5| Save your settings by clicking on "Set permissions".

D) Differing permission options for "Userprofile"

If you click on the publisher's name at the bottom of a fact you can view his/her userprofile. The userprofile is a kind of "business card" for each user. The userprofile can be adapted using the settings-options. There users can add personal information (address, telephone number,...).

If you want to limit access to the userprofiles to certain groups, proceed as follows:

- [1]** Choose "Services" from the main menu by clicking on it.
- [2]** Click on the "perm."-button next to "Userprofile".
- [3]** You will see a list of all available groups on your platform [see figure 19].

Userprofile		access	
groupID	name	read	write
1	universe	<input type="checkbox"/>	
2	users	<input checked="" type="checkbox"/>	
9779	Testplattform	<input type="checkbox"/>	
9784	Mitarbeiter	<input type="checkbox"/>	

figure 19: permissions Userprofile

- [4]** Choose the group(s) which should be able to read userprofiles. If you choose "users", for instance, only logged in users will be able to read the userprofiles.
- [5]** Save your settings by clicking on "Set permissions".

E) Differing permission options for "Users Online"

The P-Admin can determine which group(s) should be allowed to view the list of online users ("Users Online"). Moreover, the P-Admin decides which group(s) should be allowed to send ping messages.

In order to set permission for "Users Online", proceed as follows:

- [1]** Choose "Services" from the main menu by clicking on it.
- [2]** Click on the "perm."-button next to "Users Online".
- [3]** You will see a list of all available groups on your platform.
- [4]** Choose group(s) by clicking in the checkboxes:

Access-rights:

- "access + read": These groups are allowed to view the list of online users.
- "access + write": These groups are allowed to send ping messages to online users.

- [5]** Save your settings by clicking on "Set permissions".

7. Custom service titles

The standard version of an FCS platform offers several services with pre-defined service titles. You can adapt the titles according to your wishes.

In order to adapt a service title, proceed as follows:

- [1]** Choose "Interface" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Custom Service labels".
- [3]** A table opens in which you can define new titles for each service in several languages [see figure 20]. The title in the column "Default" is automatically used if you do not define a title for one ore more languages.

Service	Default	German	English
Structure	neuer Titel		
Texts	neuer Titel		
News			
Dialog			
Events			
Links			
Literature			
Partner			
Images			
Downloads			
Slideshow			

figure 20: customize Service titles

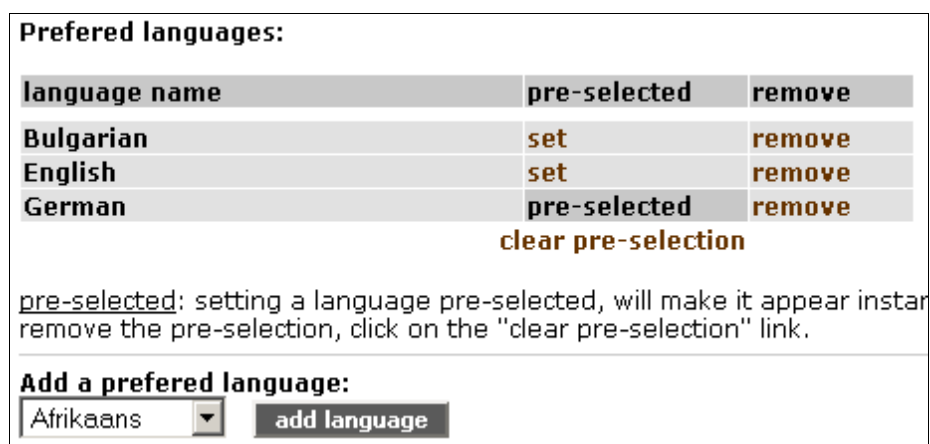
- [4]** Click on "Save changes" to submit your entries.

8. Language identification for content

Users can indicate in which language content has been written by choosing a language from a drop down menu in the input mask. The languages offered in the drop-down menu are selected by the P-Admin.

In order to select languages for the drop-down menu, proceed as follows:

- [1]** Choose "Languages" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Content Languages".
- [3]** At the bottom, you will see a drop-down menu with all available languages [see figure 21].



Preferred languages:

language name	pre-selected	remove
Bulgarian	set	remove
English	set	remove
German	pre-selected	remove

[clear pre-selection](#)

pre-selected: setting a language pre-selected, will make it appear instar
remove the pre-selection, click on the "clear pre-selection" link.

Add a preferred language:

Afrikaans

figure 21: language selection for the input mask

- [4]** Open the drop-down menu and choose a language. A chosen language will be displayed in the drop-down menu in the input mask at the very top.
- [5]** Click on the button "add language".
- [6]** Now, the chosen language appears in the table at the top.
- [7]** Repeat steps 4 and 5 for each desired language.
- [8]** You can determine that a language should be already pre-selected in the input mask. In order to do so, click on the "set"-link next to the respective language.

9. Copyright for facts

Each input mask has a copyright input field at the bottom. Facts will mostly have the same copyright. The P-Admin can define a default copyright which can be adapted by publishers if required.

In order to define a default copyright for facts, proceed as follows:

- |1| Choose "Meta info" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Fact copyright".
- |3| Insert the desired default copyright in the input field [see figure 22].

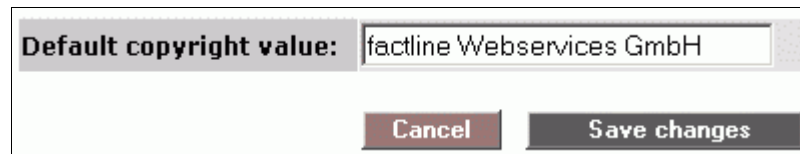
The image shows a web form for setting a default copyright value. It features a label "Default copyright value:" on the left, followed by a text input field containing the text "factline Webservice GmbH". Below the input field are two buttons: "Cancel" and "Save changes". The "Save changes" button is highlighted with a dark background and white text.

figure 22: language selection for the input mask

- |4| Click on "save changes" to submit your settings.

10. Options area (left column)

The options area (left column) contains all important information about content displayed in the main frame. The P-Admin can determine the extent and organisation of information offered.

10.1. Enable and define boxes

Decide which boxes are relevant on your platform.

In order to enable boxes, proceed as follows:

- |1| Choose "Interface" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Define boxes".
- |3| If you have not enabled any boxes yet, click on the link "click here to enable boxes".
- |4| Now, you see a table with all available boxes [see figure 23]. You will be offered a standardized pre-selection which you can adapt according to your personal wishes at any time.
 - displayed:
Choose which boxes should be displayed in the options area.
 - opened:
Choose which boxes should be automatically open. Users can close and open boxes if required.
 - visible for:
Choose which user groups should be able to see the box.

Box title	displayed	opened	visible for	move
Info	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	— everyone (default) —	<input type="radio"/> ←
Services	<input type="checkbox"/>	<input type="checkbox"/>	— everyone (default) —	<input type="radio"/> ←
Login	<input type="checkbox"/>	<input type="checkbox"/>	— everyone (default) —	<input type="radio"/> ←
Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	— everyone (default) —	<input type="radio"/> ←
View	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	— everyone (default) —	<input type="radio"/> ←
Filter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	— everyone (default) —	<input type="radio"/> ←
Settings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	— everyone (default) —	<input type="radio"/> ←

figure 23: enable boxes

- |5| Click on the arrows in the column "move" to organise the order of the boxes in the options area.
- |6| Click on "Save configuration" to submit your settings.



New boxes

Click on "refresh the list" to load newly available boxes on your platform. New boxes will be displayed in the P-Admin interface afterwards.

10.2. Deactivate boxes = list representation

You want to switch to the list display version in the options area?

Proceed as follows:

|1-2| as described above

|3| Click on "disable boxes" above the table.

10.3. Hide options area

There is the possibility to hide the options area for users who are not logged in.

In order to hide the options area, proceed as follows:

- [1]** Choose "Interface" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Interface options".
- [3]** Click in the checkbox in the row "Don't display the left frame in guest mode?" [see figure 24].

Option	values
Hide the "help link" to the user manuals?	<input type="checkbox"/>
Disallow hiding of the left frame?	<input type="checkbox"/>
Display login form on each page in the left frame?	<input type="checkbox"/>
Dont display the left frame in guest mode?	<input checked="" type="checkbox"/>
Hide TITLE of texts in guest mode?	<input type="checkbox"/>
Center the contents of the main frame? - AND limit the width of the main frame to <i>The value is in pixels, must be a number, greater than 400. Use this option only when main frame is centered!</i>	<input type="checkbox"/> px
Display fact icon in every fact view page?	<input type="checkbox"/>
<input type="button" value="Cancel"/> <input type="button" value="Save changes"/>	

figure 24: hide options area

10.4. Do not allow hiding of the options area

If required, it is possible to disallow the hiding of the options area.

Simply proceed as follows:

- [1]** Choose "Interface" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Interface options".
- [3]** Tick the checkbox in the row "Disallow hiding of the left frame?".

Part III: Adapt system messages

11. Email templates

Email templates define the content and layout of automatic email messages sent by the system. A newly registered user receives his/her password via email automatically, for instance. The P-Admin can personalize the text of the email templates.

11.1. Create an email template

First, the general procedure will be explained. Examples for adjustments in the main input field ("Body") are given afterwards.

In order to create an e-mail template, proceed as follows:

- [1]** Choose "Messages" from the main menu by clicking on it.
- [2]** Click on the "modify"-button next to "Email templates".
- [3]** If your platform has just been created, you will see a list of standardized email templates. In order to change one of the templates, click on the "modify"-button in the respective row. If one of the templates is still missing, click on the respective link on the left side.
- [4]** In order to create a new email template, fill out the following input fields:
 - Sender email:** Fill in the sender's email address.
 - Sender names:** Fill in the sender's name (e.g. name of the platform or of the P-Admin)
 - Subject:** fill in the subject of the email e.g. "Your registration"
 - Body:** create the email text (see chapter [11.2. Examples for email templates](#), S. 36).
 - Encoding:** In case your users are mainly from the western European area you can keep to the "default".
- [5]** Click on "add" or "Save changes" in order to save the template.

11.2. Examples for email templates

Below you see the standard email texts. The commands in squared brackets

<< >>

are wildcards for words which the system inserts automatically. For instance, the command <<username>> will be replaced with the actual username by the system.

A) Registration notice for users:

This email is sent to users after they have registered on an FCS platform. You can adapt the text according to your wishes. The commands <<username>> and <<password>> need to be included in the email under all circumstances.

```
Dear <<firstname>> <<lastname>>,

Welcome to the factline community server (FCS). Please
use the following data for your Login:

username: <<username>>
password: <<password>>

Please be aware that username and password are case
sensitive. Therefore we recommend you copy&paste the
password for the first time and change it afterwards to
something you can easily remember.

Best regards from your
factline support team.
```

figure 25: registration notice for users (standard-text)

B) Registration notice for P-Admins:

Below you see an example of a registration notice sent to P-Admins after a new user has registered on the platform [see figure 26]. You can adapt the text according to your wishes. However, the command <<username>> must not be deleted.

Choose from the list of recipients who should get a registration notice for P-Admins.

```
Hello pAdmin,

The following new user:
Name: <<firstname>> <<lastname>>
Username: <<username>>
E-Mail: <<email>>
has registered on FCS

Yours
FCS
```

figure 26: registration notice for P-Admins

C) Email notification:

Each user can define the range of his/her email notification. The email notification is either sent on a daily, weekly or monthly basis (see "User manual" chapter "Email notification").

Below, you see the standard email text for email notification [see figure 27]. You can adapt it according to your wishes. However, you must not delete the command <<changes>>.

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

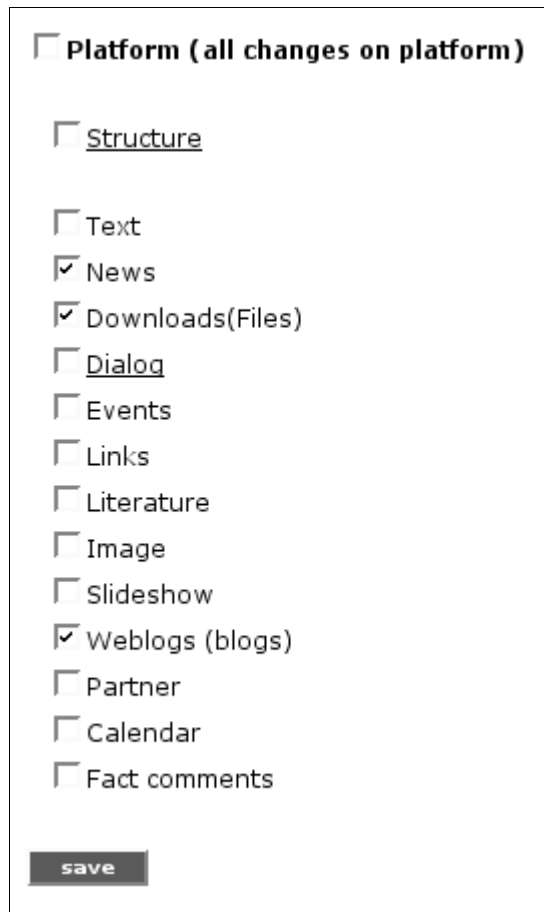
figure 27: e-mail notification

12. P-Admin notification

Platform administrators have the possibility to define an automatic email notification (see "User manual" chapter "Email notification") for the platform main group (see chapter [5. User groups – general information](#), S. 11). This way, users who do not order a personalized email notification receive notification as defined by the P-Admin.

Selection for automatic email notification is conducted as follows:

- |1| Choose "Services" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Notification".
- |3| Now, you see a list of all available services *[see figure 28]*. Decide about which services the users should be notified. In the services "Structure" and "Dialog" you can select individual folders and/or forums. In order to do so, either click on "dialog" or "structure".



Platform (all changes on platform)

Structure

Text

News

Downloads(Files)

Dialog

Events

Links

Literature

Image

Slideshow

Weblogs (blogs)

Partner

Calendar

Fact comments

save

figure 28: P-Admin notification selection

- |4| Click on "save" to submit your settings.



Users' agreement

When registering on the platform, users are asked if they agree to receive P-Admin notification. In addition, they can cancel the receipt of P-Admin notifications at any time.

13. Login and password message

Registration, login and password are highly sensitive and decisive stages of access to a platform. Usually, platform administrators want to highlight different aspects and give different information. For this reason, every P-Admin has the possibility to adjust the text messages on these pages according to his/her individual needs.

13.1. Login message

The login message is displayed on the login page of your platform. Here you should inform guests and users if a registration is necessary and/or desired.

In order to adapt the login message, proceed as follows:

- [1]** Choose "Messages" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Login message".
- [3]** Now you see an input field for each interface language, and a default field at the top [see figure 29].

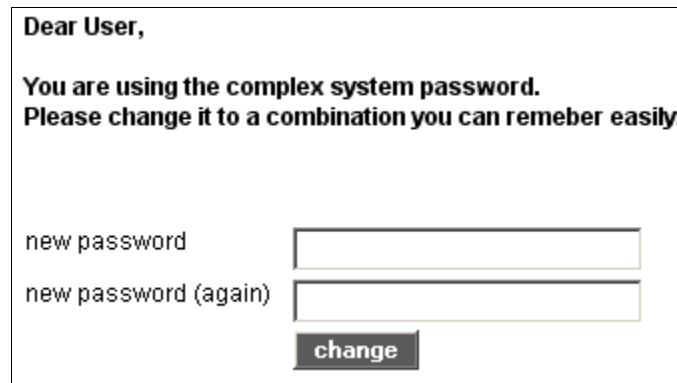
Default:	<code>Information on registration:
You do not need to register if you only want to read public information.
However, if you want access to restricted areas and publish information, you need to register. Please note, that only persons known to me will be authorized for restricted areas.</code>
German:	
English:	
<input type="button" value="Cancel"/> <input type="button" value="Save message"/>	

figure 29: login message

- [4]** Enter the desired text for each language. The input in the default field will be used if you do not explicitly enter a text for a language. It is not necessary to fill out the default field as there is already a standard text for each system interface language.

13.2. Password message

The password message is displayed when a user logs in for the first time [see figure 30]. He/she is asked to change his/her password. Maybe you want to include some kind of welcome-information.



The screenshot shows a message box with the following content:

Dear User,

**You are using the complex system password.
Please change it to a combination you can remember easily.**

new password

new password (again)

figure 30: password message

In order to adapt the password message, proceed as follows:

- [1]** Choose "Messages" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Password message".
- [3]** Now you see an input field for each available platform interface language, and a default input field at the top.
- [4]** Enter the desired message for each language. The input from the default field is used if you do not explicitly enter a text for a language. It is not necessary to fill out the default field as there is already a standard text for each system interface language.

14. Copyright message

Every platform has a footer where the "copyright message" is displayed. The default message is "powered by: factline Community Server". You can adapt this text at any time.

In order to adapt the copyright message, proceed as follows:

- | 1|** Choose "Messages" from the main menu by clicking on it.
- | 2|** Click on the "modify"-button next to "Copyright message".
- | 3|** You can now insert your text in the input field. If you would like to insert a link, you must add `class="link"` [see figure 31].

eg. `factline`



figure 31: edit copyright message

- | 4|** Click on "save" to submit your changes. The new copyright message is now displayed in the footer of your platform.

15. Print layout

Every fact can be printed with the help of the "print preview" button in the left frame. The header of the print layout page can be adjusted according to your wishes.

In order to adapt the print layout, proceed as follows:

- |1|** Choose "Messages" from the main menu by clicking on it.
- |2|** Click on the "modify"-button in the row "Print layout".
- |3|** In the input field you see the code for the standard print layout header. You can change it in any way you want. Formatting of this message is done with HTML. System information can be included with special code:

system information	
platform title	<<title>>
URL of the printed page	<<url>>
date	<<date>>

Code of the standard print header:

```
<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>
</td>
</tr>
</table>
</html>
```

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

Part IV: Additional options

16. Guarantee of existence (GOE)

There is the possibility to provide content with a guarantee of existence. If desired, the S-Admin activates this option and sets a GOE maximum. Afterwards, the P-Admin needs to do some adjustments.

Procedure:

- [1]** Choose "Guarantee" from the main menu by clicking on it. A page loads which shows you the chosen mode. If you want to switch between modi, click on the "switch mode"-button in the middle [see figure 32].

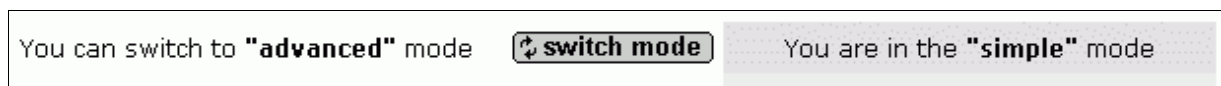



figure 32: switch mode

- [2]** Decide on one mode:
 - advanced:** In "advanced mode", you decide which user groups are allowed to set guarantees of existence for content.
 - simple:** In "simple mode", you fix a GOE-date which is automatically used during the publication of content.


	Guarantee of existence (GOE) In the meta data, you can see whether a fact has a guarantee of existence or not.
---	--

16.1. Advanced mode

If you have decided on "advanced mode" , you need to go through the following steps.

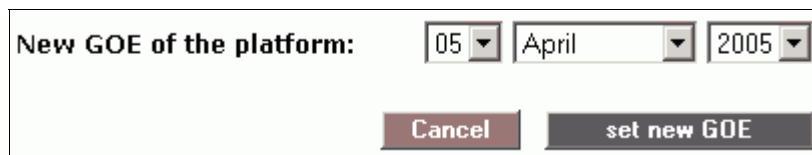
Step 1: set GOE maximum

In this step, you decide on a GOE maximum. It can be lower than the GOE date set by the S-Admin. We recommend to set a low GOE maximum in the beginning. While you can extend it at any time, it is not possible to lower it. An extension of the GOE maximum affects all facts which have been published with the selection "GOE maximum". This way, the GOE of several facts is automatically extended.

**GOE maximum of the S-Admin**
The GOE maximum set by the S-Admin can be found by clicking on "Guarantee" in the main menu.

In order to set a GOE maximum, proceed as follows:

- [1]** Set a GOE maximum by using the drop-down menus [see figure 33]. The GOE maximum must not exceed the GOE date set by the S-Admin.



New GOE of the platform: 05 April 2005

Cancel set new GOE

figure 33: set GOE maximum

- [2]** Click on "set new GOE".

Step 2: set GOE minimum and default

A default assists users in assigning a guarantee of existence during the publishing process. The GOE minimum ensures that no fact is published without a guarantee of existence.

Procedure:

- [1]** Click on the checkbox next to "default".
- [2]** Choose a date or period of time [see figure 34].
(You can see the current GOE maximum in the system info.)



default:

default = 0 date: 18 November 2005 period: 5 Days maximum

figure 34: set GOE default

Part IV: Additional options - 16. Guarantee of existence (GOE)

- |3| If required, click on the checkbox next to "set minimum".
- |4| Choose a date or a period of time [see figure 35].

figure 35: set GOE minimum

- |5| Click on "Save changes".

Step 3: set limitations and permissions per group

- |1| Determine a GOE maximum for individual groups [see figure 36].

Group:	GOE: guarantee = 0*	guarantee = date	guarantee = period	guarantee = maximum GOE maximum from step 1: 05 Apr 2005
users	<input checked="" type="radio"/>	<input type="radio"/> 05 April 2005	<input type="radio"/> 3 Days	<input type="radio"/>
sys	<input checked="" type="radio"/>	<input type="radio"/> 05 April 2005	<input type="radio"/> 3 Days	<input type="radio"/>
Symlink Main	<input type="radio"/>	<input type="radio"/> 05 April 2005	<input type="radio"/> 3 Days	<input checked="" type="radio"/>
Admins	<input type="radio"/>	<input type="radio"/> 05 April 2005	<input type="radio"/> 3 Days	<input checked="" type="radio"/>
Test_P	<input checked="" type="radio"/>	<input type="radio"/> 05 April 2005	<input type="radio"/> 3 Days	<input type="radio"/>

figure 36: set limitations for GOE

- |2| At the bottom you see the box "show checkbox for extending GOE". If you choose "Yes", publishers can forbid other users to extend the guarantee of existence for the fact. If you choose "No", all users who are permitted to edit the fact are automatically permitted to extend the guarantee of existence.
- |3| Click on "Save changes".

Set guarantee of existence (GOE)
Users can only set guarantees of existence if they are permitted to edit.

16.2. Simple mode

Step 1: set GOE maximum

see "Step 1: advanced mode"!

Step 2: set GOE for all facts

All facts which are published on your platform are automatically provided with this guarantee of existence (GOE). You can adapt this setting at any time.

Procedure:

[1] Choose one of the following options [see figure 37]:

- = 0:** No fact is provided with a guarantee of existence. This option is suitable for the initial phase of your platform.
- = date:** Choose a specific date.
- = period:** After publication, facts are reliably available for a certain period of time.
- = maximum:** The fact is reliably available until the GOE maximum set in step one. You can extend the GOE maximum at any time.

System info:
In step 1 the GOE maximum was defined as: **27 Feb 2005**

guarantee = 0
this fact version can be deleted at any time.

guarantee = date
this fact version will be available until this date:

guarantee = period
this fact version will be available for this period after publishing:

guarantee = maximum
No content can be deleted, users can only hide content. If GOE maximum is extended in step 1, the GOE of all facts will be extended automatically.

figure 37: set GOE for all facts

[2] Click on "Save changes".

17. Newsletter

In addition to the P-Admin notification (see chapter [12. P-Admin notification](#), S. 38), you can inform users directly with a newsletter. A newsletter is an e-mail which is sent to more than one recipient. In other words a newsletter is a mass e-mail.

Professional newsletters are only sent to subscribers. Users should have the possibility to order a newsletter and to be able to cancel such order at any time.

On factline Community Server (FCS), only P-Admins can send newsletters!

17.1. Create a form for subscribing and unsubscribing

First, you have to create a form for subscription and a form for cancellation of subscription, otherwise users will not be able to order the newsletter.

You have to begin by deciding where newsletter forms should be placed.

Step 1: position of the newsletter forms

The newsletter forms can be positioned in two different places. You can either select one or both of them.

A) Box in the options area (left column)

- |1| Choose "Interface" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Define Boxes".



Older platforms

If your platform was created before **28th of June 2004**, you must reload the list of boxes. Remember the current settings of the boxes as you will have to set them again after reloading. Click on "disable boxes" and then on "enable boxes". The new box "Newsletter" will appear.

- |3| Now click in the checkbox "Newsletter display" and decide whether the box should or should not be open by default.

B) Additional page in the main window

A button which links to the form needs to be created in the header or in another location (e.g. left frame, start page) by factline. Send us an email to support@factline.com.

Step 2: edit forms

After you have specified the position of the newsletter, you can edit the details of the forms:

Create form fields

The following steps are necessary no matter where the forms are located.

- |1| Choose "Services" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Newsletter".
- |3| Click on the "modify"-button in the row "Form fields".
- |4| One field ("Email") is already specified. You can add input fields by clicking on "add new field" below the table.
- |5| Fill in the following input fields:
 - UID name:** unique identifier for the field
Please note! The UID cannot be changed after it has been saved once.
 - Form lable(s):** Enter a field title for each language.
 - Input type:** At the momet there is only one option.
 - Is required:** determines whether the user has to fill out the input field under any circumstances (mandatory) or not
 - UP analogue:** Select an appropriate setting, if there is correspondence with data from the user profile.
- |6| Click on "create this field" to add the field.
- |7| In the list of the form fields you can adjust the order of the fields with the "move up" and "move down" links.

Write form texts

The form texts are only necessary if you display the subscription form on an additional page in the main window (see option B).

- |1| Choose "Services" from the main window by clicking on it.
- |2| Click on the "modify" button in the row "Newsletter".
- |3| Click on the "modify"-button in the row "Form display".
- |4| Insert the texts that should appear above and below the subscription form. Moreover, insert the texts that should be displayed after a successful subscription or cancellation of subscription.
- |5| Save the texts by clicking on the "save"-button.

17.2. Set a layout for the newsletter

After you have finished creating the forms, we recommend to set a newsletter layout. In the layout you can store permanent data like sender information, for instance.

In order to set the layout for your newsletter, proceed as follows:

- [1]** Choose "Messages" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Newsletter".
- [3]** Click on the "modify"-button in the row "Email layout defaults".
- [4]** Fill out the input fields [see figure 38]. In the input field for "footer", you should insert a link that leads to the unsubscribe form. An example text is shown below the input field.

Services > Newsletter > Email layout defaults

Sender name: Astrid Holzhauser

Sender email: astrid.holzhauser@factline.com

Reply-to email:

Content encoding: Default (english/german) [v]
Leave the encoding default if you are using the standard latin characters.

Footer (unsubscribe) text: `

<hr size=1>
Wenn Sie diesen Newsletter nicht mehr erhalten
möchten, folgen Sie diesem Link:
<unsubscribe>Newsletter abbestellen</unsubscribe>.`

Example text:
*<hr size=1>You are receiving this email because you have
subscribed to receive this newsletter. If you want to unsubscribe,
please visit <unsubscribe>the subscription page</unsubscribe>.*

Cancel Save options

figure 38: newsletter layout

17.3. Write a newsletter

After you have prepared the forms and set a layout, you can write a newsletter at any time.

First, you have to publish the text for the newsletter on your platform with a text-fact. This way, you create a newsletter archive at the same time. Afterwards, you have to enter the infoID of the newsletter in the input mask in the P-Admin interface.

Subscriber list

You can view the list of the subscribed users. If you want to send a newsletter to certain subscribers, you can make your selection here.

In order to choose subscribers from the list, proceed as follows:

- [1] Choose "Services" from the main menu by clicking on it.
- [2] Click on the "modify"-button in the row "Newsletter".
- [3] Click on the "modify"-button in the row "Subscriber list".
- [4] Choose the subscribers you want to send the newsletter to and click on the "Send a newsletter to selected subscribers"-button [see figure 39].

List of subscribers:

UserID	Username	e-mail	subscribed	ed	rm	select
19582	Max	max.muster@abc.at	20 Mar. 06; 11:20			<input type="checkbox"/>
19583	Tina	tina.renrut@info.net	16 Mar. 06; 14:52			<input type="checkbox"/>
19584	RobertR	robert.drofder@office.com	20 Feb. 06; 16:27			<input type="checkbox"/>
		kate.nosduh@welcome.com	20 Feb. 06; 16:23			<input type="checkbox"/>
19585	ClintW	clint.woodeast@western.net	20 Feb. 06; 16:21			<input type="checkbox"/>
		meg.nayn@love.at	20 Feb. 06; 16:20			<input type="checkbox"/>
		mel.nosbig@info.net	25 Nov. 05; 10:59			<input type="checkbox"/>
		penelope.zurc@abc.com	15 Nov. 05; 17:07			<input type="checkbox"/>
19138	SeanB	sean.naeb@info.net	23 Oct. 05; 08:49			<input type="checkbox"/>

figure 39: list of subscribers

- [5] Now, you see the "create newsletter" input form. Please continue with "create newsletter", step 4.

Create newsletter

In order to send a newsletter to all subscribers, proceed as follows:

- [1]** Choose "Services" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Newsletter".
- [3]** Click on the "modify"-button in the row "Create newsletter".
- [4]** In the input mask *[see figure 40]* you can change the sender name and sender email if necessary. In the last input field, you have to enter the infoID of the text that you published previously.

Sender name	<input type="text" value="Astrid Holzhauser"/>
Sender email	<input type="text" value="astrid.holzhauser@factline.com"/>
Reply-to email	<input type="text"/>
Footer text	<hr/> <p>Wenn Sie diesen Newsletter nicht mehr erhalten möchten, folgen Sie diesem Link: Newsletter abbestellen.</p>
Fact complete infoID	<input type="text"/> NOTE: format is id.v, version must be existing, published (not zero). Test and News facts only.
<input type="button" value="Cancel"/> <input type="button" value="Continue to check"/>	

figure 40: input mask "create newsletter"

- [5]** Click on "Continue to check". A test email will now be sent to the email address of your P-Admin user.
- [6]** If you are satisfied with the result, you can click on "Send the newsletter". If you want to make any changes, click on the "cancel"-button. You will be redirected to the input mask.

18. Create/edit filters (types and time periods)

"Types" are a means of categorizing and filtering content. The platform administrator can define types for "News", "Events", "Links" and "Library".

18.1. Create types

In order to create types, proceed as follows:

- [1]** Choose "Services" from the main menu by clicking on it.
- [2]** A table with all services is displayed. Click on the "types"-button next to the desired service.
- [3]** A list of types is displayed [see figure 41]. If your platform has just been created, the list is empty.



The screenshot shows a form titled "Add a new news type:" in green text. Below the title, there are three input fields: "Default value:", "German:", and "English:". At the bottom of the form, there are two buttons: "Cancel" and "Add new news type".

figure 41: create types

- [4]** Insert a type name in the "Default value" input field.
- [5]** Click on the "add ... type"-button.

i **Length of the input**
The user selects the types from a drop-down menu in the options area (left column). Due to the limited width of the left column, a type name must not be longer than 20 characters.

- [6]** The new type is immediately displayed in the list and can be used on the platform.

18.2. Edit/delete types

In order to edit/delete types, proceed as follows:

- |1| Choose "Services" from the main menu by clicking on it.
- |2| A table with all services is displayed. Click on the "types"-button next to the desired service.
- |3| Now, you see a list with all available types [see figure 42]. You can either edit or delete them.







id	news type title	edit	del
21	company news (3 translations)		
7	FCS update (2 translations)		
20	projects (2 translations)		

figure 42: edit/delete types

Edit types

- |4| Click on "edit" next to the type you want to edit [see figure 42].
- |5| Make your changes [see figure 43].

Editing news type "company news":

:Default value

:German

:English

figure 43: edit types

- |6| Click on "Edit type" to save your changes.

Delete types

- |4| Click on "delete" next to the type you want to delete [see figure 42].
- |5| The chosen type is now deleted. It will not be displayed in the list. If a type is deleted, all facts assigned to the type will remain on the platform. They can be viewed choosing the filter option "all".

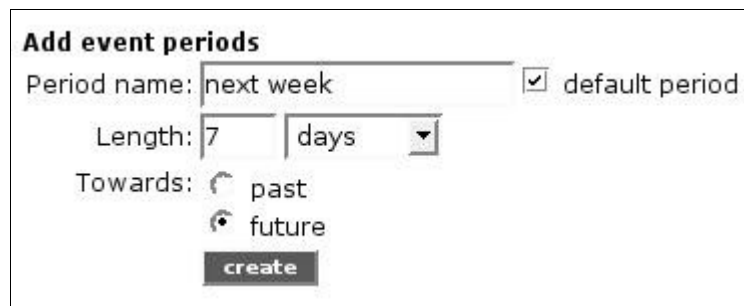
18.3. Customized time periods for "Events", "News"

In the services "Events" and "News", a user can choose between seven standardized time periods (next month, next 3 months, past 3 months,...) to filter events. Furthermore, the P-Admin has the possibility to create self-defined time periods for the platform.

Please note that the standard periods will no longer be displayed, after you have created one or more self-defined period(s).

In order to create a new time period, proceed as follows:

- [1] Choose "Services" from the main menu by clicking on it.
- [2] A table with all services is displayed. Click on the "modify"-button next to the service "Events".
- [3] Now, you see an empty list and a form which needs to be filled out [see figure 44]:



Add event periods

Period name: default period

Length:

Towards: past future

figure 44: define customized types

Period name:

Enter a short description/name for the new time period (e.g. next week). 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 and choose a time interval (days, month, year) from the drop-down menu.

Towards:

Specify whether the time interval defined previously (length) should point to the past (e.g. last 7 days) or to the future (e.g. next 7 days).

Default period:

Click in this checkbox if you want events during this period to be displayed first whenever a user clicks on "Events".

- [4] Click on "create" in order to save the new time period.

If you want to use the standardized time periods of FCS again, click on "set default".

19. Factlist & Search options

19.1. Adjust the display of search results

Usually, demands of websites differ from demands of platforms. For this reason, the Service "Factlist & Search" can be adjusted as regards the hiding of unnecessary information. The P-Admin can define which information should be visible for which group(s).

In order to adapt the display of "Factlist & Search", proceed as follows:

- [1]** Choose "Interface" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Factlist & Search display".
- [3]** Make your adjustments in the following subsections:

General display options:

In this section you can adapt the sort sequence, title length, number of results,... [see figure 45]

Option	values
At start the list is sorted by:	title
	Ascending (A->Z)
Number of results displayed by default at start?	results
Full title is cut to 30 characters (to fit in the column) for:	-----
Display the search input form for:	-----
Allow the "more options" section for:	Logged in users only
Allow the "show only hidden facts" selection for:	Logged in users only
Display the search result text (X facts of type were..) for:	-----
Display the column titles (for sorting) for:	Logged in users only
<input type="button" value="Cancel"/> <input type="button" value="Save changes"/>	

figure 45: general display options

Column options and visibility:

In this section you can define, which columns should be visible to which group(s) [see figure 46].

Column name	visible for:
Fact type (the icon)	Logged in users only
Title	-----
Author's names	-----
infoID	Logged in users only
Publish date	-----
Archive link	Logged in users only

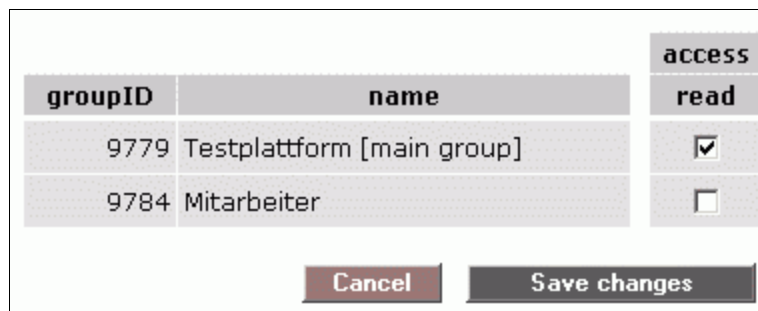
figure 46: column options and visibility

19.2. Export literature-facts

Those who collect bibliographic data on the platform can use the literature-export option. In the Service "Factlist & Search" is a subsection where you can create a CSV-file with the data of all literature-facts. The CSV-file can be opened with a spreadsheet programme (e.g. MS Excel, Open Office).

In order to set the permission for the export option, proceed as follows:

- |1|** Choose "Interface" from the main menu by clicking on it.
- |2|** Click on the "modify"-button in the row "Faclist & Search display".
- |3|** Click on the "modify"-button in the row "CSV-export options".
- |4|** Choose the group(s) which should be allowed to see the export option [see figure 47].



groupID	name	access
		read
9779	Testplattform [main group]	<input checked="" type="checkbox"/>
9784	Mitarbeiter	<input type="checkbox"/>

figure 47: csv-export access permission

- |5|** Click on "Save changes" to submit your settings.

20. Automatic group assignment

If you know who is going to register on your platform, you can use the function "automatic group assignment". All you need to do is insert the email addresses of the respective person(s) in a list.

You can either insert one email address after the other or upload a list of all email addresses. If you are expecting a lot of registrations, we recommend to upload one list for each group.



Requirements for a list of email addresses

The list needs to be available as a ".txt" or ".csv" file. Make sure that the file only contains email addresses. You can use ";" or "," as separators in ".txt" files. ".csv" files can be created in every spreadsheet programme such as MS Excel or Open Office.

Proceed as follows:

- [1]** Choose "Groups & Users" from the main menu by clicking on it.
- [2]** Click on the "modify"-button in the row "Automatic group assignment".
- [3]** The email addresses of future users are inserted in the table.
- [4]** Click on the red link "upload list of email addresses" on the left side.
- [5]** Insert the path to your list of email addresses by clicking on the "browse"-button [see figure 48].






The screenshot shows a dialog box for uploading a list of email addresses. It has the following elements:

- File:** A text input field followed by a "Browse..." button.
- Expiration date:** A text input field with the placeholder text "(yyyy-mm-dd)".
- Groups:** A list of three groups with checkboxes:
 - Admins (70002)
 - administrators (70010)
 - Test_P (70012)
- Buttons:** "Cancel" and "Upload file" buttons at the bottom.

figure 48: upload list of email addresses

- [6]** If required, insert an expiration date. As soon as the expiration date is reached, the automatic group assignment will be stopped.
- [7]** Choose to which groups the newly registered users should be assigned.
- [8]** Click on "Upload file".
- [9]** Check your settings in the list [see figure 49] and make adjustments if necessary.
- [10]** Save your settings by clicking on "Save changes".

Part IV: Additional options - 20. Automatic group assignment

e-mail	exp. date*	Admins	administrators	Test_P	remove
aaaa@gmx.at	2006-01-01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
bello@hotmail.com	2005-11-30	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
harry@top.at	2005-12-01	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
maria@guz.at	2005-11-24	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
nic@gmx.at	2005-12-03	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

* The correct date format is yyyy-mm-dd

figure 49: list of email addresses

As soon as a person registers on your platform with one of the specified email addresses, he/she will be automatically added to the respective group. Users can start to work on the platform immediately. There will be no more delays caused by manual group assignment.

The email addresses of registered users are displayed in a list below the "Save changes"-button. This way, you can check who has already registered and who has not. The automatic group assignment will only work for one registration per email address.

21. Mandatory permissions

Permissions are defined for each fact. Usually, the publisher can set permissions on his/her own. The option "Mandatory Permissions" allows the P-Admin to either provide users with a mandatory pre-selection of permissions or to leave them out completely (see step 5!).

In order to set mandatory permissions, proceed as follows:

- |1|** Choose "Groups & Users" from the main menu by clicking on it.
- |2|** Click on the "perm."-button in the row "Mandatory permissions".
- |3|** Now, you see two rows [see figure 50]. You should always check one row after the other:



Mandatory permissions	modify
Groups affected by mandatory permissions	
Select mandatory permissions	

figure 50: options for mandatory permissions

- |4|** Click on the "perm."-button in the row "Groups affected by mandatory permissions".
- |5|** **apply:** Choose the group(s) which should be provided with mandatory permissions in the column "apply" [see figure 51].
- hide:** Choose the group(s) which should not be able to set permissions at all in the column "hide" [see figure 51].

ID	Name	apply*	hide**
70001	Symlink Main	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
70002	Admins	<input type="checkbox"/>	<input type="checkbox"/>
70012	Test_P	<input checked="" type="checkbox"/>	<input type="checkbox"/>

figure 51: choose groups for mandatory permissions



"apply" main group:

Do not forget to click on "main group" in the column "apply"! All registered users are automatically a member of the main group. As long as the main group has not been chosen, nobody will be provided with mandatory permissions.

Part IV: Additional options - 21. Mandatory permissions

- |6|** Click on "save" to submit your settings.
- |7|** Click on the "perm."-button in the row "Select mandatory permissions".
- |8|** Decide which groups should be provided with read, modify and/or work permissions for all facts [see figure 52].

Modify mandatory permissions

groupID	name	read	modify	work
1	universe	<input type="checkbox"/>		
70001	Symlink Main	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
70002	Admins	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
70012	Test_P	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

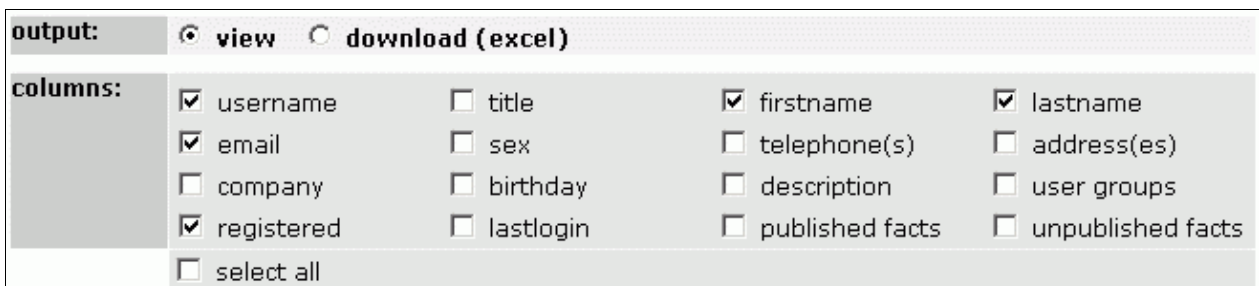
figure 52: define mandatory permissions

22. List and export user data

If you want an overview of all users of a particular platform, you can create a list. You can download the list and then work on it in a spreadsheet programme such as MS Excel or Open Office.

Procedure:

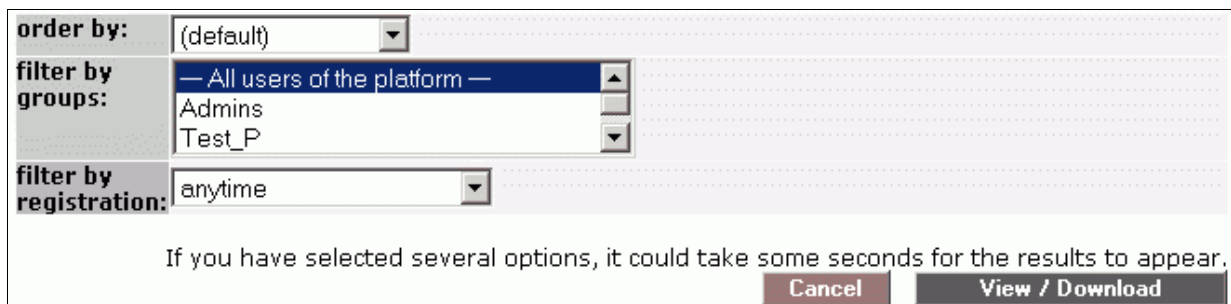
- |1| Choose "Groups & Users" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "View/download".
- |3| Decide whether you want to view or download the user list [see figure 53].



The screenshot shows a dialog box titled "output:". It has two radio buttons: "view" (selected) and "download (excel)". Below this is a section labeled "columns:" with a grid of checkboxes for various user attributes. The checked attributes are: username, email, registered, and select all. The unchecked attributes are: title, sex, birthday, lastlogin, firstname, telephone(s), description, published facts, lastname, address(es), user groups, and unpublished facts.

figure 53: create a list of all users

- |4| In the row "columns", choose which data you want to put into the final list.
- |5| Decide in the row "order by" according to which column the data shall be ordered [see figure 54].



The screenshot shows a dialog box with three sections: "order by:" with a dropdown menu set to "(default)"; "filter by groups:" with a list box containing "All users of the platform", "Admins", and "Test_P"; and "filter by registration:" with a dropdown menu set to "anytime". At the bottom, there is a message: "If you have selected several options, it could take some seconds for the results to appear." and two buttons: "Cancel" and "View / Download".

figure 54: order the list of users

- |6| The drop-down menu "filter by groups" allows you to limit the result to certain groups.
- |7| The drop-down menu "filter by registration" allows you to reduce the result to newly registered users.
- |8| Click on "View/Download" to receive the final list.

23. Platform title for search engines and browser

Choose an individual title for your platform. Search engines will display and save your platform under the title you defined. Moreover, the title will be displayed in your browser window at the very top. We recommend to choose a descriptive and significant title!

In order to define a platform title, proceed as follows:

- |1| Choose "Meta info" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Platform title for search engines and browser windows".
- |3| Insert a title of your choice in the input field [see figure 55].



New title:

This specific title is displayed in the title bar of the browser window.
It is also used for search engine results.

figure 55: define a platform title

- |4| Click on "Save new title" to submit your settings.

24. Metatags for search engines

It is important to define "Metatags" for your platform. This way, your platform will be found and registered more easily by search engines and their robots. Metatags usually comprise information on authors, content, keywords and copyright for instance. You can easily define metatags for your platform in the P-Admin interface.

In order to define metatags, proceed as follows:

- |1| Choose "Meta info" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Metatags".
- |3| Fill out the input fields:

revisit-after:

The "revisit-after" input field tells search engines in which time intervals they should search the content of the platform. Use the following format e.g. "20 days."

author:

Name of the author of a platform

DC.Language:

Here you can indicate the language in which content on the platform is written. Use language abbreviations e.g. German = de, English = en, Spanish = es. You can find a list of all language abbreviations under the following URL:

<http://www.loc.gov/standards/iso639-2/englangn.html>

DC.Rights:

Here you can indicate who owns the copyright for content on your platform. You can also insert a URL where all copyright information is located.

DC.Publisher:

Here you can indicate who is responsible for the publication of data. This can either be the author himself/herself or a publishing house, for instance.

DC.Contributer:

Here you can indicate co-author(s) or person(s) who have made considerable contributions (e.g. a translator). Separate the names with commas.

- |4| Now, there are three input fields left:

You can enter the description (description of content) and the keywords in several languages. Do not forget to indicate the respective language abbreviation (see DC.language).

language:

Enter a language abbreviation.

description:

This text is displayed in the list of results of a search engine.

Keywords:

Keywords are used to describe your platform. People who search for one of these keywords should be directed to your platform by the search engine. Do not enter too many keywords. It is recommended to enter not more than 20 keywords. It makes sense to list the words in singular and plural.

- |5| Click on "save" to submit your settings.

Part III: Design of the Platform

25. Create/edit the startpage

The term "startpage" describes the content and layout of the homepage of a platform. Below, you see two examples from our references (<http://www.factline.com/148950.0>):

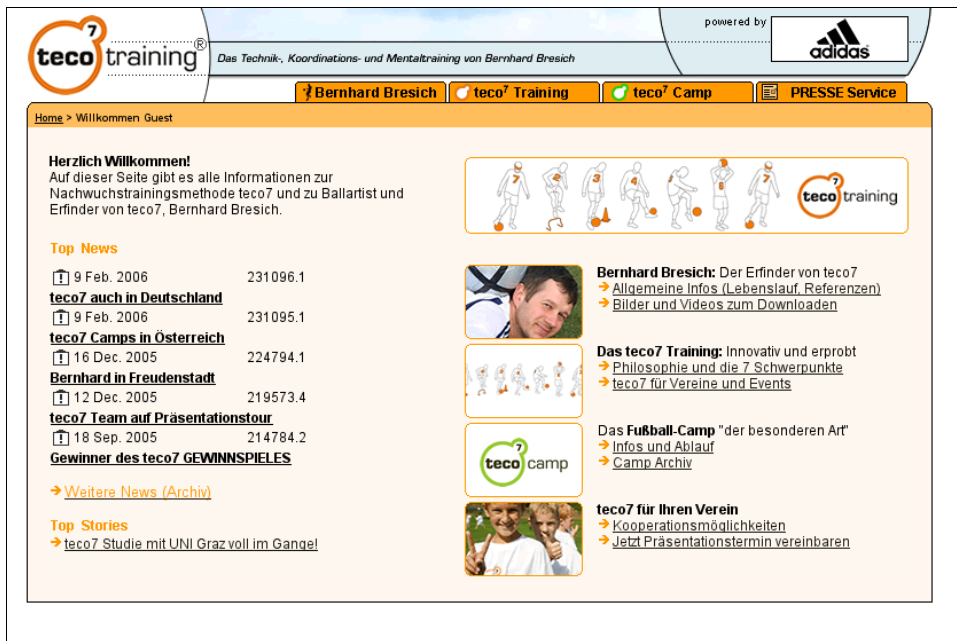


figure 56: <http://www.teco7.com/>

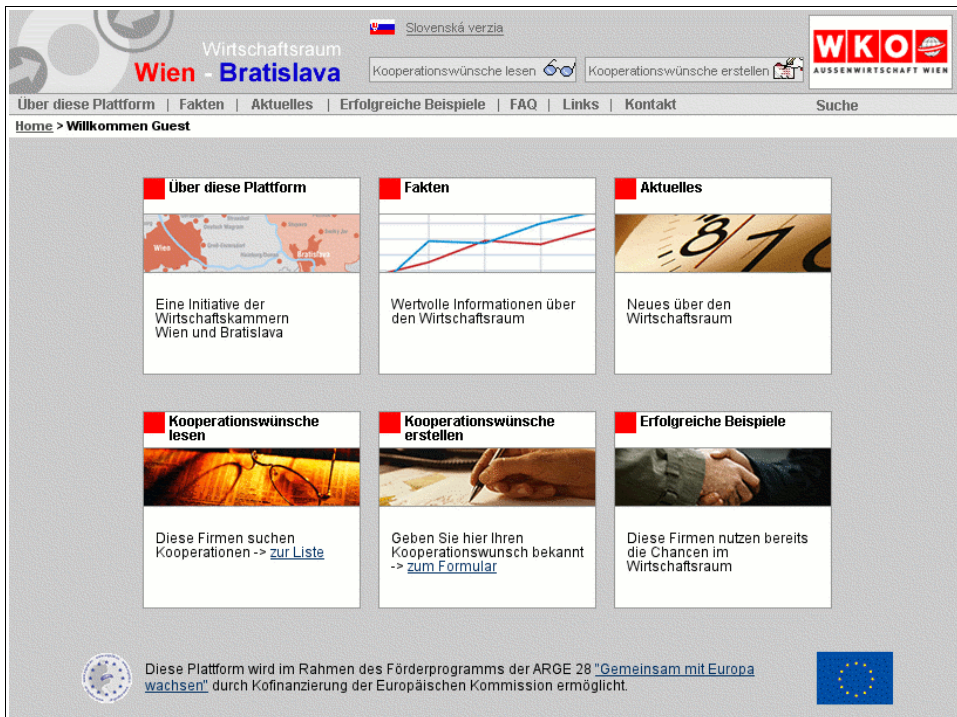


figure 57: <http://www.wien-bratislava.at>

You can use the start page of your platform to give a general overview of your platform or project, to announce an upcoming event, to link to different folders,...

If you decide to limit authorization to specific people, you might want to put a text on the startpage which explains that registration is required in order to access information.

In order to create/edit your startpage, proceed as follows:

- |1| The startpage is not created/edited in the P-Admin interface but on the platform itself. You have to log in with your P-Admin username and password.
- |2| At the bottom of the startpage you will see two links: "edit start page" and "start page history".
- |3| Click on "edit start page".
- |4| You can insert a title for your startpage (e.g. "Welcome on the platform") if you want to or leave it empty. In the input field "content" you can enter as much text or HTML code as you like. You can insert pictures, create links to content on the platform,... If you use HTML your text has to start with <html> and end with </html>.

For further details on how to create and format content on the platform, please read through the user manual.

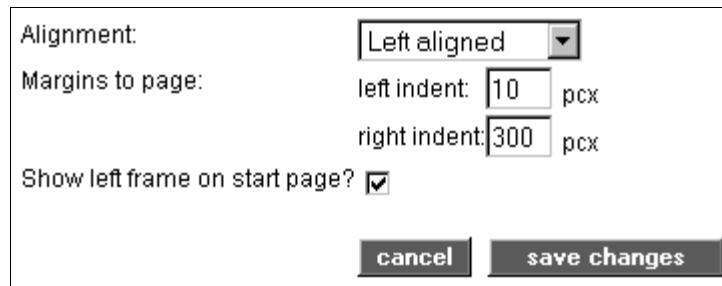
- |5| Below the input fields, you see two options [see figure 58] for alignment of your startpage:

Alignment:

Choose from the drop-down menu whether you want the content of your startpage to be displayed left aligned, right aligned, centered or justified.

Margin to page (exact position):

Here you can indicate how many pixels the startpage should be indented to the left and to the right.



The screenshot shows a form with 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".

figure 58: startpage alignment

- |6| Finally, you can click in the "Show left frame on start page?"-checkbox. If you do so, the options area (left column) will be visible on the startpage.
- |7| Click on "save changes" to submit your settings.

26. Design a header

The header of your platform can be customized according to your wishes. You can change simple things like text color, text size, background color yourself. At the moment, more advanced design can only be implemented by factline Webservices GmbH upon request.



Advanced design

If factline has created an advanced header design for you, you must not use the header design interface in the P-Admin interface otherwise you will delete the header created by factline.

In order to adjust the header design, proceed as follows:

- |1| Choose "Interface" from the main menu by clicking on it.
- |2| Click on the "modify"-button next to "Header design".
- |3| At the top, you can see an image with letters and numbers in it. The numbers refer to input fields where you can make your adjustments:
 - Point (1):** Here you can change the platform title, and the font type for text in the header.
 - Point (2):** Insert a character which should be placed between the menu buttons (eg. " - " or " | ").
 - Point (3 – 6):** Choose the background color for the different parts of the header.
 - Point (1, 7 – 8):** Choose a text size and text color.
 - Point (A – C):** Choose the height (in pixels) of the different parts of the header.
 - Point (9 – 10):** Choose the space (in pixels) around the partner image.
- |4| Click on "Save changes" to submit your adjustments.

27. Create a stylesheet

Stylesheet is the abbreviation for CSS (Cascading Style Sheet). A stylesheet is a kind of template for HTML pages. The layout (background color, font type, text size,...) for all pages is specified in one template.

In order to create a stylesheet, proceed as follows:

- |1|** Choose "Interface" from the main menu by clicking on it.
- |2|** Now, click on the "modify"-button next to "Body design".
- |3|** A stylesheet consists of several elements called "classes". Below *[see figure 59]*, you see a list of all available classes.



figure 59: class overview

Some classes have sub-classes. Click on the plus symbol left of the class label in order to display the sub-classes.

Classes next to a grey checkbox serve only as a "heading". Changes can only be made in the classes lying underneath.



Help button

The help buttons tell you which elements can be changed in the individual classes. If you click on a help button, a pop-up window opens with all necessary information.

- |4|** Click on the title of a class in order to specify or change certain elements. If you want to edit more than one class at once, click in the checkboxes of the desired classes and click on "edit selected" at the bottom.

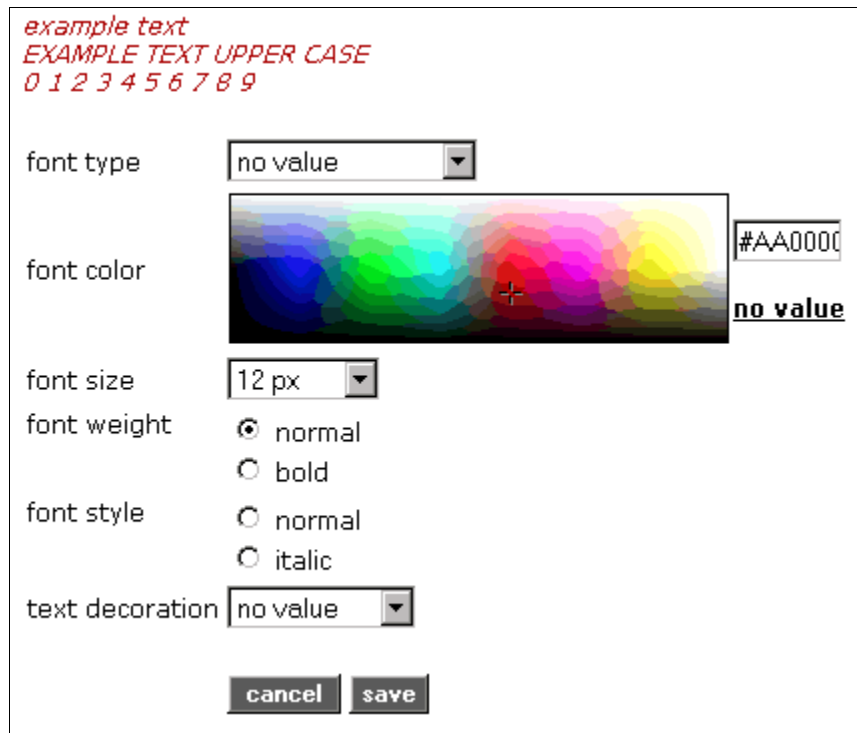


figure 60: edit a class

- |5a|** In classes which refer to characters, you can make six different settings (font type, font color, font size, font weight, font style, text decoration).

You can specify the font color by selecting it from the color overview table or by entering the exact color value in the input field next to the color selection [see figure 60].

- |5b|** If you want to restore the original settings in the class, click on "reset class" at the bottom.

- |6|** Click on the "save"-button to submit your settings.

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

28. Adapt service lists

In the service repositories and the structure, content is displayed in lists. You can adapt the organisation of these lists according to your wishes.

Procedure:

- |1| Choose "Interface" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Define list columns".
- |3| Click on the "list"-button next to the desired service. (If you choose the service "Structure", continue with chapter 28.1. Lists in "Structure", p. 71.)
- |4| The following table shows you all data available for display. Figure 61 shows data for the service "Text".

Move	Column name	Show?	Visible for	Min width in px	Max characters	Word wrap?	Align	Sort asc	Sort desc
↑ ↓	icon	<input checked="" type="checkbox"/>	— everyone (default) —	10			right		
↑ ↓	title	<input checked="" type="checkbox"/>	— everyone (default) —	220		<input checked="" type="checkbox"/>	left (default)	<input type="radio"/>	<input type="radio"/>
↑ ↓	infoID	<input checked="" type="checkbox"/>	— everyone (default) —	70			left (default)	<input type="radio"/>	<input type="radio"/>
↑ ↓	publisher	<input checked="" type="checkbox"/>	— everyone (default) —	90		<input type="checkbox"/>	left (default)	<input type="radio"/>	<input type="radio"/>
↑ ↓	published	<input checked="" type="checkbox"/>	— everyone (default) —	50			left (default)	<input type="radio"/>	<input checked="" type="radio"/>
↑ ↓	GOE	<input type="checkbox"/>	— everyone (default) —	50			left (default)	<input type="radio"/>	<input type="radio"/>

figure 61: adapt service lists

- |5| Decide which data (e.g. icon, title, infoID,...) should be displayed in the service list by clicking in the checkboxes in the column "Show?".
- |6| In the column "visible for" you can specify which user groups should see the individual columns (e.g. everyone, logged in users only,...).
- |7| Moreover, you can adapt the display of the columns:

Min width in px: Determines minimum width of the column.

Max characters: How many characters should be displayed at most?

Word wrap?: Entries which exceed the minimum column width will be displayed in several rows.

Align: Determines the alignment (e.g. left, right) of entries in the column.

Sort asc: The list is sorted ascendingly by the column you choose.

Sort desc: The list is sorted descendingly by the column you choose.

- |8| The column "Move" on the left side allows you to change the order of the columns in the list.
- |9| Finally, you can choose how many facts should be displayed in the list at once [see figure 62].

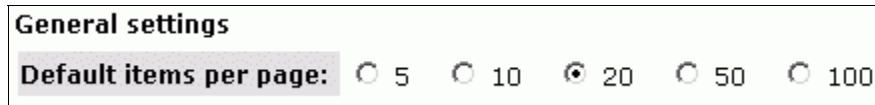


figure 62: number of facts per page

- |10| Click on "save" to save your settings.

28.1. Lists in "Structure"

There are two different types of lists in the service "Structure":

- standard list:** simple list with title and metadata
- thumbnail list:** list with image preview for facts of the services "image" and "album"

If you want to allow users to choose between standard and thumbnail list, you need to enable this option. By doing so, users are provided with a drop-down menu as soon as they create a folder.

In order to enable the thumbnail list option, proceed as follows:

- |1| Choose "Interface" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Define list columns".
- |3| Click on the "list"-button in the row "Structure".
- |4| Click in the checkbox in the row "Thumbnail list" [see figure 63].

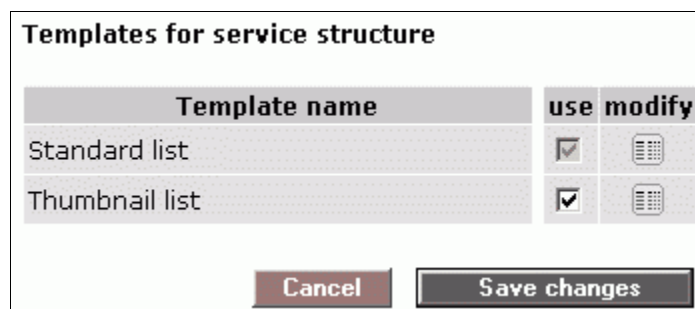


figure 63: lists in structure

- |5| Finally, click on "Save changes".

Part IV: Maintenance of a platform

29. User administration

More and more users will register on your platform. Newly registered users are automatically added to the "platform main group", however they must be assigned to other groups by the P-Admin if required.

If you want to add a user to a single group, we recommend to proceed as follows:

- |1| Choose "Groups & Users" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row "Editing groups".
- |3| You will see a list of all available groups. Click on the "users" button next to the desired group.
- |4| Now, you see all users who are a member of this group. Click on "add/search user" on the left side.
- |5| Click on the radio button "all users". Then, click on "Search for Users" to begin the search.
- |6| A list of users who are registered on your platform is displayed. Users who are already a member of the group are highlighted with a green check. Select one or more users by clicking in the checkboxes and click on "Add to group" (see chapter [5.4. Add users to one group](#), S. 16).

If you want to add a user to several groups, we recommend to proceed as follows.

- |1| Choose "Groups & Users" from the main menu by clicking on it.
- |2| Click on the "modify"-button in the row, "All groups & users".
- |3| Now, you see a table which shows all groups and users of your platform.

The following additional features support you in assigning users to several groups:

- repetition of the column "username":
If there are more than eight groups, the column "username" is displayed again.
- repetition of the column titles:
If there is a long list of usernames, the row showing the column titles is displayed again.

- information field:
If you point at a checkbox, an information field is displayed [see figure 66].
The information field shows you which user you would assign to which group with this checkbox.

|4| Click in the respective checkboxes.

|5| Click on "Save changes" in the right corner.

|6| Now, you see a confirmation page showing your specifications.

|a| The specifications are correct:
Click on "Save changes" in order to submit your changes.

|b| The specifications are incorrect:
Click on "Cancel". The table will be reloaded and you will have to choose all checkboxes again.

Apart from manually assigning users to groups, you can use the option "automatic group assignment" (see chapter [20. Automatic group assignment](#), p. 58).

P-Admins can be notified if a new user registers on the platform. In order to receive notification, an email template needs to be created (see chapter [11. Email templates](#), S. 35).

30. factchat editor

Platforms with "factchat" have a factchat editor in the P-Admin interface. The factchat editor allows you to save factchat conversations in tables. This way, evaluation and documentation of individual discussions should become much easier for you. Furthermore, you can delete individual messages (postings) from the factchat with the help of the factchat editor.

In order to display the factchat history, proceed as follows:

- |1| Choose "Services" from the main menu.
- |2| Click on the "modify"-button in the row "factchat".
- |3| A selection window, with several options to choose from, opens:

1. Which period of time should be displayed?

The fields are automatically filled with the current date [see figure 64]. You have to adjust them in the given format according to your needs.

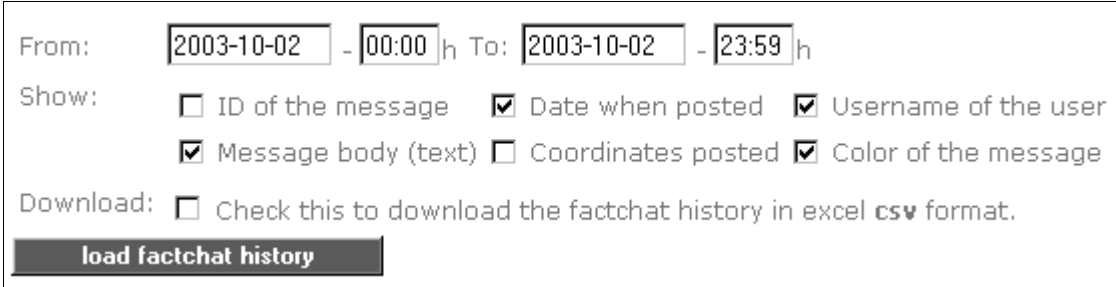


figure 64: factchat editor

2. Which message details would you like to display?

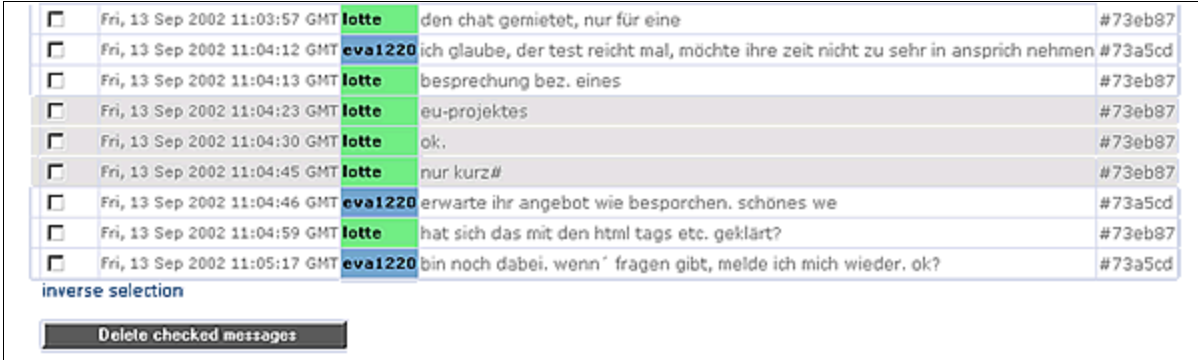
The most important details are automatically checked for you. The selection can be adapted accordingly. The following fields can be selected:

ID of the message:	unique number of the posting
Date when posted:	date and time of the message
Username of the user:	username of the author
Message body (text):	text of the message
Coordinates posted:	coordinates of the message (in the grey chat field)
Color of the message:	background color of the message

We do not recommend to choose "Check this to download the factchat history in excel csv format." when using the factchat editor for the first time.

- |4| Click on "load factchat history".
- |5| A list with all chosen message details should be displayed now [see figure 65].

- [a]** If no data is displayed, no messages have been created during the selected period. You have to extend your selection and click on "load factchat history" again.
- [b]** If you want to delete one ore more messages, click in the respective checkboxes next to the messages and click on "Delete checked messages" [see figure 65].



<input type="checkbox"/>	Fri, 13 Sep 2002 11:03:57 GMT	lotte	den chat gemietet, nur für eine	#73eb87
<input type="checkbox"/>	Fri, 13 Sep 2002 11:04:12 GMT	eva1220	ich glaube, der test reicht mal, möchte ihre zeit nicht zu sehr in anspruch nehmen	#73a5cd
<input type="checkbox"/>	Fri, 13 Sep 2002 11:04:13 GMT	lotte	besprechung bez. eines	#73eb87
<input type="checkbox"/>	Fri, 13 Sep 2002 11:04:23 GMT	lotte	eu-projektes	#73eb87
<input type="checkbox"/>	Fri, 13 Sep 2002 11:04:30 GMT	lotte	ok.	#73eb87
<input type="checkbox"/>	Fri, 13 Sep 2002 11:04:45 GMT	lotte	nur kurz#	#73eb87
<input type="checkbox"/>	Fri, 13 Sep 2002 11:04:46 GMT	eva1220	erwarte ihr angebot wie besprochen. schönes we	#73a5cd
<input type="checkbox"/>	Fri, 13 Sep 2002 11:04:59 GMT	lotte	hat sich das mit den html tags etc. geklärt?	#73eb87
<input type="checkbox"/>	Fri, 13 Sep 2002 11:05:17 GMT	eva1220	bin noch dabei. wenn fragen gibt, melde ich mich wieder. ok?	#73a5cd

inverse selection

Delete checked messages

figure 65: factchat history

- [6]** If you want to save the list, select "Check this to download the factchat history in excel csv format". Then, click once more on "load factchat history."
- [7]** A small grey window opens in which you are asked whether you want to save the csv-data or open it (csv data files can be opened in MS-Excel). In order to save, select the option "save data on storage medium" and click on "OK". Now the standard window of Windows Explorer opens. Navigate to the directory where you want to save the file, and click on "save". The file is now saved.

31. Analyze statistics

The last button in the P-Admin main menu is "Statistics".

In order to view statistics, proceed as follows:

- |1|** Choose "Statistics" from the main menu by clicking on it.
- |2|** Now, you can see a table with three rows.
 - |a| Platform general:**
 - disk usage ("webpace") and traffic
 - behaviour of users
 - documentation of search requests
 - |b| Users:**
 - Overview of new registrations and logins
 - |c| Service related:**
 - Information on usage of services
 - Information on usage of facts
- |3|** Click on the "view"-button in one of the rows.



Graphs

All graphs in statistics can be enlarged in an extra window by clicking on them.

31.1. Platform general

You see a table with three rows. Click on the "view"-button in one of the rows to view statistical data.

A) Traffic and disk usage

Here you find...

- information on disk usage ("webspaces")
- information on traffic

Please note, you will be charged for disk usage and traffic that exceeds the values laid down in the contract.

B) Visitors and visits

Here you can find out

- how many users visited your platform per day/month/year.
- how many guests visited your platform per day/month/year.
- how many bots searched your platform per day/month/year.
- how many pages were viewed (by users, guests) per day/month/year.
- which browsers were used by your visitors.
- how long your visitors stayed on your platform and which pages they visited.
- how your visitors were directed to your platform.

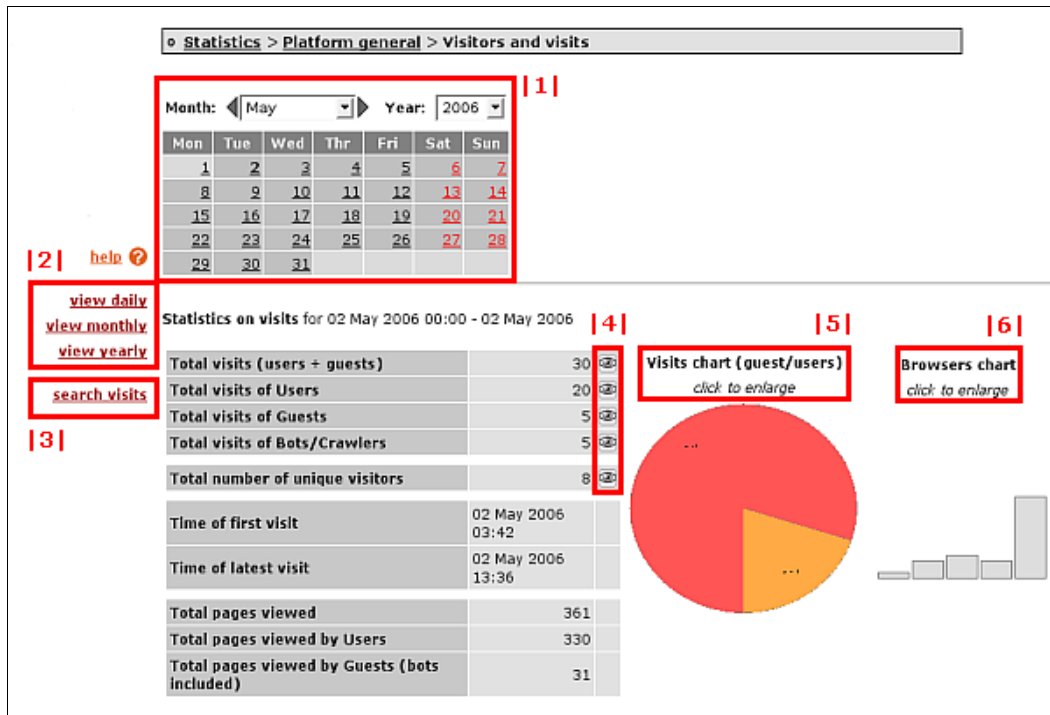


figure 66: visitors and visits

Figure 66 gives an overview of the options in "Visitors and visits":

|1| calender:

Choose a day, month or year.


|2| view daily/monthly/yearly:

Here you can limit or extend the options provided in the calender. For instance, if you click on "view yearly", only the drop-down menu "Year" will be displayed in the calender.

|3| search visits:

"Search visits" offers filtering options for a certain time interval.

|4|  Visit view:

Click on an eye-button  in the table [see figure 67]. The "Visit view" opens where you can see all individual visits of the chosen time period.

Total visits	32	
Total visits of Users	23	
Total visits of Guests	9	
Total visits of Bots/Crawlers	0	
Total visits with referer*	0	
Total number of unique visitors	3	


figure 67: number of visits

You can limit the list of visits to certain user groups by using the drop-down menu at the top [see figure 68].



figure 68: visits drop-down menu

Click on the eye button in the column "Info" [see figure 69]. There you can find all information about a session. A session is the term used to describe all activities during one visit.

Some rows have a "referrer"-button  [see figure 69]. This means that the respective visitor got to your platform via a link on another website. If you click on the button, the website which directed the visitor to your platform opens in a new window.

Host/IP	User	Time	Os	Type	ref*	info
80.108.189.152	Robert, Drofder (12345)	01 May 2006 16:59	windows XP	user		
212.183.38.240	Sandra, Kcollub (22317)	01 May 2006 15:31	windows XP	user		
195.230.177.167	Michael, Eroom (76177)	01 May 2006 14:50	windows XP	user		
194.24.158.16	Carrie-Ann, Ssom (4522)	01 May 2006 12:29	windows XP	user		
131.130.122.45	Colin, Lleraf (92210)	01 May 2006 11:17	windows XP	user		

figure 69: session info

|5| Visits chart:

The first graph on the right side shows you the ratio of users and guests. In order to enlarge the graph, you need to click on it.

|6| Browser chart:

The browser chart shows you which browsers your visitors used. In order to view all data, click on the graph.

C) Statistics for Service Search

Here you can find out

- how many search requests were submitted per day/month/year.
- which services (e.g. text, image,...) where searched.
- which keywords were used.

31.2. Users (login statistics)

This table [see figure 70] tells you

- |1| how many users have registered on your platform during the last month.
- |2| which users have visited your platform during the last 10 days for how long.

▶ Statistics > Groups and users				
 1 				
New Users since 21 Sep. 2003 in platform factline community server:				
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	
 2 				
Logins for the last 10 days (GMT)				
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 70: login statistics

31.3. Service related (usage of services)

Here you have the possibility to get statistical data on the contents and usage of the different content services.

The first table gives a summary for each content service. In order to get detailed information, click on the "view"-button in the respective row [see figure 71].













Service	facts	Service size	Times read	view
Start page	1	1,43 KB	1526	
Structure	248	36,54 KB	768	
Texts	35	2,28 MB	1.196	
Dialog	23	12,83 KB	141	
Partner	3	6,15 KB	133	
Image	15	7,65 KB	65	
Downloads	90	954,51 KB	1.249	
Album	146	174,45 KB	539	
Calendar	17	4,33 KB		
Weblogs	33	49,86 KB	187	
Factcomments	41	41,45 KB		
Links	58	228,35 KB	495	
Literature	20	180,96 KB	165	

figure 71: service statistics overview

Below you can see detailed information on facts in the service "News" [see figure 72]. The indicator "Times read" may be of special interest to you. This indicator tells you how many times a certain document has been read.

▼ InfoID	Title	Creation	Last update	Versions	Size	Times read
100056		14 Mar. 2001	14 Mar. 2001	1		
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
116491	Massive Performancesteigerung des FCS	14 Jan. 2003	14 Jan. 2003	2	1.599	652
116493	FCS erhält Innovationspreis MERCUR 2002	14 Jan. 2003	14 Jan. 2003	3	1.478	1.430
116495	TOP True Online Publishing	14 Jan. 2003	14 Jan. 2003	2	1.833	2.702

pages: 1 2

figure 72: service statistics