



KNOWLEDGE FORUM[®] 4.5

USER'S GUIDE





ACKNOWLEDGEMENTS

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Knowledge Forum is a joint development of the CSILE/Knowledge Building Project at the University of Toronto and Learning in Motion.

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1 INTRODUCTION

1.1 WHAT IS KNOWLEDGE FORUM?

Today's most successful research teams, businesses, hospitals, and classrooms have one thing in common: they know how to transform individual ideas into collective knowledge.

Researchers call these organizations “knowledge-building communities”:

- Places where every individual contributes to a growing body of information and ideas.
- Places where the creation of new knowledge is everyone's most important work.
- Places where shared knowledge leads to innovation and growth.

Knowledge Forum is an electronic group workspace designed to support the process of knowledge building. With Knowledge Forum, any number of individuals and groups can share information, launch collaborative investigations, and build networks of new ideas—together.

With Knowledge Forum, users build and refine a database (knowledge base) of *notes*. A note is a passage and/or picture relating to some aspect of the user's own learning. Typical notes in Knowledge Forum can include a problem, a graphic illustrating a theory, a research plan, or a summary of information found from resource materials. Notes also include the exchange of differing ideas or theories, challenges to thinking, or “what if”-type statements that lead Knowledge Forum community members to new understandings. The Knowledge Forum environment is not just a way to “post” information; it is much more. It is the meeting place—the “forum”—in which users build a body of knowledge.

Notes are public within the knowledge base. They can be retrieved from the Knowledge Forum knowledge base and examined by any member of the knowledge base. Notes can also be published and, if the knowledge base is made available through the Internet, published ideas can be shared.

1 INTRODUCTION

Users interact with one another in Knowledge Forum in a number of ways:

- By quoting the work of their peers.
- By building on the work of their peers.
- By co-authoring notes.
- By annotating work.
- By rising above a series of notes to synthesize the ideas in a way that creates a knowledge advance.
- By publishing their best work for peers to read and comment on.

Thus, Knowledge Forum can be thought of as a user-generated, hypermedia research environment—operated either on a local area network or through the Internet—that is constructed collaboratively and evolves continually.

Knowledge Forum is a distinctive software package, but each of its features—a multi-user knowledge base, text and graphics capabilities, commenting and notification facilities—can be found in other software. The instructional activities form a distinctive package as well, but are made up of familiar components in which users pose questions, hypothesize, consult reference sources, explain, critique, and so on. The real distinctiveness of Knowledge Forum lies in its harmonious integration of software and teaching methods—each influencing the other and resulting in a powerful combination. Unlike most educational technology, Knowledge Forum was not created in the laboratory and then tried in the real world. From the beginning (1986), its predecessor, Computer Supported Intentional Learning Environment (CSILE), was the result of cognitive scientists, computer scientists, teachers, students, and business people working together to produce a new model of knowledge building.

1.1.1 THE PRODUCT

The Knowledge Forum software package consists of a server application that can be accessed across local- and wide-area computer networks and the Internet from a Web browser (such as Netscape or Internet Explorer). The server manages the knowledge base and browsers communicate with the server from other computers on the network. The server will operate on Windows NT/2000, Macintosh OS X, or Red Hat Linux.

At the beginning, the knowledge base is empty. Users create notes, which they “contribute” to the knowledge base. The browser transmits the notes to the server, which in turn stores them in the knowledge base. When users want to recover their notes at a later date (or possibly from a different computer), the server sends the notes to the appropriate browser, and the client displays them on the screen. In this manner, users can access knowledge base notes from any computer connected to the Internet.

1.2 HISTORY

When Computer Assisted Instruction first emerged in the 1960s, we did not yet understand how to design programs that would help individuals learn how to learn, learn how to set cognitive goals, or learn to apply effective strategies for comprehension, self-monitoring, and organization of knowledge. Through research, we now know much more. In the last 15 years, cognitive researchers have made substantial progress in providing a basis for such programs. Knowledge Forum is the result of such progress.

Knowledge Forum is the next-generation product of CSILE. CSILE was developed to support a “research team” approach to learning, which its inventors (professors Marlene Scardamalia and Carl Bereiter) call a “Knowledge-Building Community.” Classrooms that adopted the CSILE approach were likened to research communities, in which individual users worked as researchers on a team. Like researchers, users were expected to pose questions, define their own learning goals, acquire and build a knowledge base, and collaborate with one another. The ongoing practice of these advanced operations, combined with support and coaching, was intended to help users acquire the sorts of learning strategies that characterize expert learners—and it did so successfully. Now Knowledge Forum, the second-generation CSILE, brings the same facilities and more to create a knowledge-building society.

1.3 PUTTING KNOWLEDGE AT THE CENTER

The Knowledge Forum software is designed to support the development of knowledge-building communities. This goal is accomplished through the provision of various supports for knowledge construction, collaboration, and progressive inquiry:

- **Supports for knowledge construction:** Supports for knowledge construction include multiple formats for knowledge representation (text, graphics), a flexible note updating and retrieval mechanism, tools for establishing connections between notes, and tools to advance knowledge. Using these facilities, users are able to represent their ideas in the Knowledge Forum knowledge base, create connections between related notes, and view information from multiple perspectives. These supports for knowledge representation and transformation are intended to make learning a tangible, intentional activity. In fact, the very system of Knowledge Forum mimics what we now know about the cognitive processes of expert learners. Users learn to “construct” their own ideas—to revisit them, add to them, and shape them with new information. Ideas are living things that grow and change. Users express their ideas and their learning, thus “building” a knowledge base.

Users also have the ability to frame their ideas in a visual context called a *view*. Users create these shared view environments to represent an overall organization of notes. A single note can appear in more than one view, allowing the concept contained in the note to be framed in various representations.

- **Supports for collaboration:** In addition to Knowledge Forum’s focus on knowledge building, the program strongly emphasizes tools for collaboration. Knowledge Forum can be thought of as a discourse medium because of the many ways in which the program promotes user interaction. The public nature of the knowledge base itself is perhaps Knowledge Forum’s most significant collaborative feature. Since everyone can see everyone else’s work, and see it immediately when it is created in a view, opportunities arise for collaboration in Knowledge Forum that might be missed in regular work. In many ways, interaction in Knowledge Forum is superior to traditional “group work,” because all users can benefit from all exchanges.

1 INTRODUCTION

The conception of ideas and the growth of knowledge are public activities, not concepts “presented” at the end of the grading period. Unlike face-to-face discourse, which is transitory, computer-mediated communication preserves knowledge, allowing users to more easily return to their ideas and study them from a variety of perspectives.

There are six different facilities for collaboration in Knowledge Forum. The first tool, called *build-on*, enables users to build on the ideas of others. A build-on note is a note itself and is connected to the note it is building from. When viewing a note in Knowledge Forum, users can quickly see and access all the build-on notes that have been made and, if they wish, add one of their own any place in the build-on structure. Since build-on notes are notes themselves, they can also be the subject of other build-on notes. Build-on notes may be likened to e-mail, but such a comparison does not fully capture the level of interaction that Knowledge Forum promotes. E-mail tends to involve a private exchange between two people. With Knowledge Forum, two people may exchange ideas, but their exchange becomes part of the public knowledge base and spawns successive exchanges by third parties. Thus, Knowledge Forum advances the understandings not only of the individual participants, but of the entire user base.

Another form of Knowledge Forum interaction is *quoting*, which enables users to reference other authors’ work. When a user quotes someone else’s work, a reference appears with a direct link to the quoted note.

An *annotation* is the third Knowledge Forum facility for collaboration. Annotations allow users to comment on an existing note. The annotation is not stored as a separate note, since its purpose is to comment directly and exclusively on a particular piece of work. Annotations differ from build-on notes in that users are not building on an idea but rather giving praise, correcting spelling, or simply commenting on a fact.

The fourth facility for Knowledge Forum collaboration is that of shared authorship or *co-authoring*. Any note in Knowledge Forum can be shared among any number of authors. Any user with write privileges designated as an “author” on a shared note has complete editing privileges, including the ability to edit text or graphics originally entered by other users.

1 INTRODUCTION

Users can also collaboratively select a note for *published* status. This shows other readers that the authors feel the material in the note is of high quality and meets standards. When an author wants to publish a note, that note first becomes a candidate for publishing. It will not become a published note until it is voted on by three peers (writers) or by an editor who feels it is a quality piece.

The final and most powerful tool is called *rise-above*. It not only facilitates collaboration, but allows users to gather theories and ideas that have already been presented and “rise above” these old ideas to new understandings. The notes collected in the rise-above folder disappear visually from the view and become accessible only through the new rise-above note.

- **Supports for progressive inquiry:** Another principle of Knowledge Forum’s design is to bias users toward activities that focus them on cognitive goals. To do this, a set of *scaffolds* directs learners toward cognitive operations that will help further their understanding. For instance, a Theory scaffold takes users through the steps of building and verifying a theory. In addition, the process of identifying *keywords* helps users focus on concepts they are discussing.

In summary, Knowledge Forum’s design supports a research team approach to learning through various program supports for knowledge building, collaboration, and progressive inquiry. The key features in Knowledge Forum include tools for the construction and storage of notes, tools for collaboration, scaffolds that direct users toward particular cognitive operations, and keywords that help users focus on concepts. Together, these design elements support the more purposeful and mature processing of information in which users begin to take responsibility for their own learning and the learning of others.

1.4 RESEARCH RESULTS

Knowledge Forum and its predecessor, CSILE, have been used in regular educational programs at the primary, upper elementary, secondary, and graduate school levels; in business; and in health care organizations. The University of Toronto has conducted research on Knowledge Forum over a period of fifteen years and continues to perform research studies.

For results of that research, go to either of the following Web sites:

- <http://www.KnowledgeForum.com/>
- <http://www.ikit.org/>

2 FIRST STEPS



2.1 ENTERING KNOWLEDGE FORUM

You connect to Knowledge Forum through your browser. To log on to Knowledge Forum, your browser must be either Netscape 6 or higher, or Internet Explorer 5.0 or higher.

Note: If you have not installed the server software, please consult the Administrator's Guide. After the server is operating with at least one database activated, return to this section to get started.

Your Knowledge Forum manager is responsible for providing you with the name of the server machine and the port it is located on. If your server is on a Windows or Macintosh machine, the default port number is 8080, but your administrator can change the port number.

To access the “Welcome to Knowledge Forum” window:

1. Open your browser.
2. Type the URL address: *http://yourmachinename:port#*



Browser opened to *http://kforum.motion.com:8080/*

The “Welcome to Knowledge Forum” window appears. From here you can log on to Knowledge Forum.



“Welcome to Knowledge Forum” window

2 FIRST STEPS

Note: Editors and managers should see section 12.4 to learn more about pre-registering users and setting up self-registration of users.

Note: See the Administrator's Guide to learn more about accessing other languages.

Note: If you type the wrong username or password, the window will refresh and display an error message. Try again or contact your Knowledge Forum manager if you continue to have problems.

You are either designated as a pre-registered user, where a username and password are provided for you, or as a self-registered user, where you need to create your username and password before entering Knowledge Forum.

2.1.1 LOGGING ON AS A PRE-REGISTERED USER

If you are a registered user, you will be provided a username and password by your Knowledge Forum manager. If you are a Knowledge Forum manager starting a new database, sign in with the username *manager* and the password *build*.

You may have more than one database, also known as a knowledge base, available to you. Available knowledge bases are listed in the **Database** drop-down list. You may also have the option of selecting a language.

To log on as a pre-registered user:

1. Select a language from the **Language** drop-down list.
2. Select a database from the **Database** drop-down list.
3. Type your username in the **Username** field.
4. Type your password in the **Password** field.
5. Click **Sign On**.

Knowledge Forum opens.

2.1.2 LOGGING ON AS A SELF-REGISTERED USER

If you are a self-registered user, you will need to complete a registration form in order to enter Knowledge Forum. You can access the registration form from the "Welcome to Knowledge Forum" window. You should receive a registration code from your Knowledge Forum manager to designate your group. Use this code when filling out the registration form. The next time you enter Knowledge Forum, you will be considered pre-registered, and can log on as described in section 2.1.1.

Link to registration form



Self-registration form link

2 FIRST STEPS

To log on as a self-registered user:

1. Click the [Register for a username...](#) link on the “Welcome to Knowledge Forum” window. The Registration window appears.

Note: The **Registration Code, Username, Password, Verify Password, First Name, and Last Name** fields are required fields.



The registration window is a blue-bordered form with the following fields and controls:

- Database:** A drop-down menu currently showing "Demo".
- Registration Code*:** A text input field.
- Username*:** A text input field.
- Password*:** A text input field.
- Verify Password*:** A text input field.
- First Name*:** A text input field.
- Last Name*:** A text input field.
- E-Mail:** A text input field.
- Organization:** A text input field.
- Submit:** A button located at the bottom right of the form.
- Cancel:** A button located at the bottom left of the form.

Below the form, the text "(* = required.)" is displayed.

Registration window

2. Select a database from the **Database** drop-down list.
3. Type the registration code provided by your Knowledge Forum manager in the **Registration Code** field.
4. Type a username in the **Username** field.
5. Type a password in the **Password** field.
6. Type the same password in the **Verify Password** field.
7. Type your first name in the **First Name** field.
8. Type your last name in the **Last Name** field.
9. Complete the rest of the form as needed.
10. Click **Submit**.

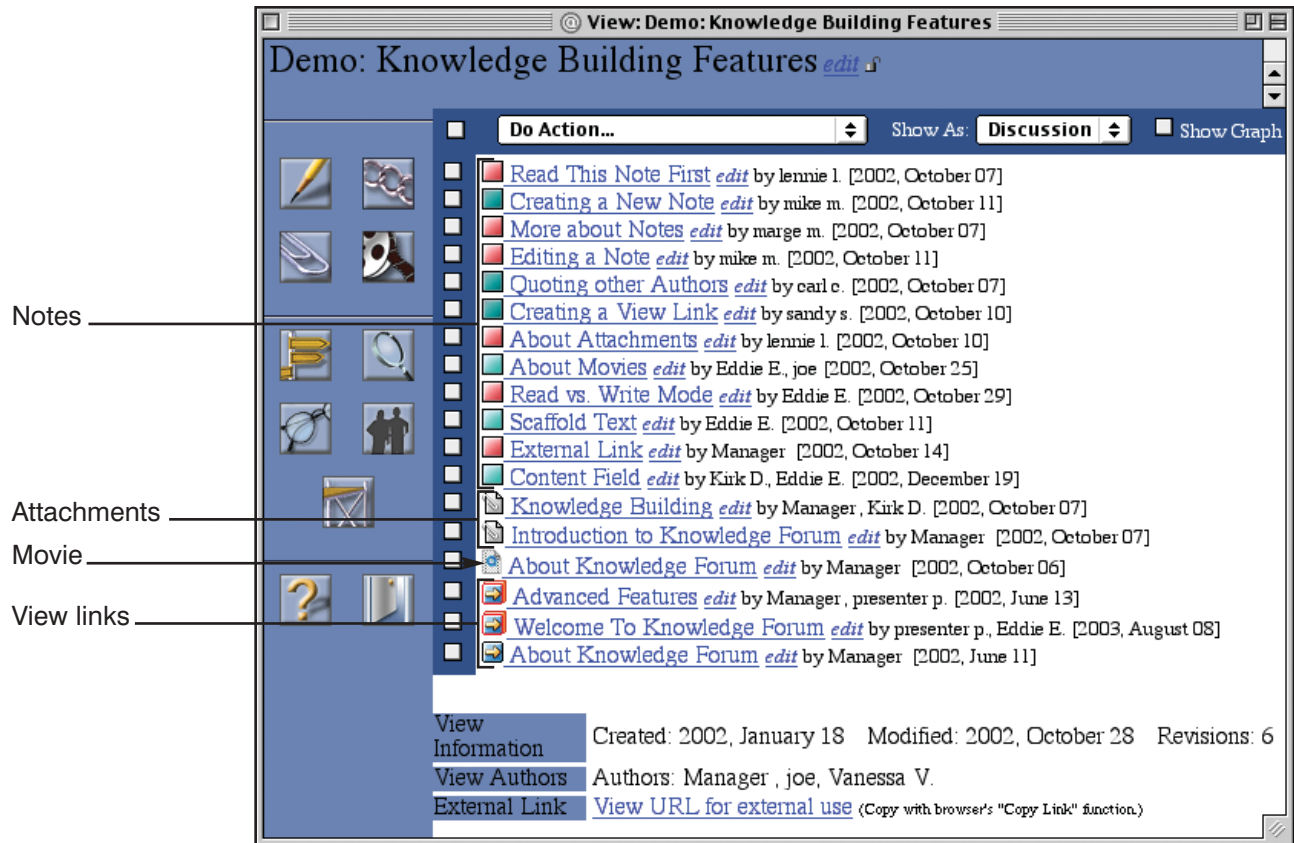
Tip: Remember your new username and password. You will use them the next time you log on.

Knowledge Forum opens.

2.2 KNOWLEDGE FORUM OBJECTS

Knowledge Forum was designed to support the development of knowledge-building communities through the provision of various supports for knowledge construction, collaboration, and progressive inquiry.





After you log on, Knowledge Forum opens to your home view window. A view can contain links to the four types of Knowledge Forum objects: notes, views, attachments, and movies.



A view containing the four types of Knowledge Forum objects

2 FIRST STEPS

Each of the four Knowledge Forum objects are described below.

Object	Link Icon	Chapters Covered	Description
Notes		4, 5	The note is the basic element in Knowledge Forum. You represent your ideas in the database with notes. Notes can include text, graphics, attachments, and QuickTime movies. Notes allow you to identify problems and keywords, and often contain scaffolds to help organize your ideas. You can connect notes to other author's notes. Notes can be added to views and other notes.
Views		3, 6, 9	Views provide a visual organization for notes, attachments, and movies. A view allows you to see the growing body of work for a particular topic. It is a representation of related ideas and discussion strands. Notes, attachments, and QuickTime movies can be moved from one view to another. Views can also contain links to other views.
Attachments		7	Attachments are documents created in other applications that are added to the database. In order to read an attachment, you must have the application the attachment was created in on your computer. Attachments can be added to views and notes.
Movies		8	Streaming and progressive QuickTime movies can be added to the database. QuickTime movies can be added to views and notes. Depending on your browser, you may be able to reference a section of a QuickTime movie in a note.

2.3 USER TYPES

Note: See section 12.4.3 to learn more about assigning user types.

There are five potential user types. Each user type has different viewing and editing privileges in Knowledge Forum. Knowledge Forum managers and editors assign user types when they add users to the system.

User Type	Description
Reader	Readers can see only published views. They cannot write or change anything in the knowledge base.
Visitor	Visitors can see only published views. They can also write notes and add keywords or problems. Visitors can only edit their own notes. Visitors cannot create views, create scaffolds, or lock views.
Writer	Writers can write notes and add keywords or problems. They can move through all views except editor views. Writers can only edit their own notes. Writers can create and lock views if their group has been given permission to do so by an editor or manager. Writers can edit or change view attributes if they are an author of the view.
Editor	Editors may edit any note or view. If a view is locked, they can unlock it. From the Author List window, editors can add and edit authors and groups (but they cannot add managers). Editors can also search for cleared or deleted notes. Editors can create editor views that are accessible only by editors and managers.
Manager	Managers have access to all options. Managers can add all types of users, including managers, to the system.

Managers, editors, and writers (and visitors on published views) are called *authors* because they can write notes. All people that can log on to the system are called *users*.

2.4 EXITING KNOWLEDGE FORUM

Note: See section 3.2 to learn more about the toolbar.

You can exit Knowledge Forum by using the **Logout** button on your toolbar. You can also quit by closing your browser windows.

To exit Knowledge Forum:

- Click .

When you exit using the **Logout** button, you will return to the “Welcome to Knowledge Forum” window.

3 VIEWS

3.1 INTRODUCTION TO VIEWS

Views provide visual organization for notes, attachments, movies, and links to other views. Views can be organized by topic, by author, by unifying idea, by standards, or by any other organizational scheme you choose.

View Title → Demo: New Knowledge Forum Features [edit](#)

Headings → Purpose of this view [edit](#) | Background [edit](#)

Action bar → Do Action... | Show As: Discussion | Show Graph

Toolbar → [Icons: pencil, eraser, magnifying glass, etc.]

Activity graph → View Activity

Month	Notes in View	Notes I've Read	Notes I've Written
N	0	0	0
D	0	0	0
J	0	0	0
F	0	0	0
M	0	0	0
A	0	0	0
M	0	0	0
J	0	0	0
J	0	0	0
A	7	5	4

Note → Search and Notification [edit](#) by Eddie E. [2003, August 08]

Attachment → Search Steps [edit](#) by Eddie E. [2003, August 07]

Movie → About Knowledge Forum [edit](#) by Manager [2002, October 06]

View link → Advanced Features [edit](#) by Manager, presenter p. [2002, June 13]

View Information → View Information Created: 2003, August 07 Modified: 2003, August 08 Revisions: 1

View Authors → View Authors Authors: Eddie E.

External Link → External Link [View URL for external use](#) (Copy with browser's "Copy Link" function.)

A view

3 VIEWS

A view consists of the following items:

Item	Where Covered	Description
Title	3.4.1	Shows the name of the database and the view.
Headings	3.5.3	Provides an area to focus discussion within a view by highlighting designated Knowledge Forum objects.
Toolbar	3.2	Allows you to access other features of the knowledge base or add Knowledge Forum objects to the view.
Action bar	3.5, 5, 11.2	Allows you to copy objects to My Reader or other views; clear or delete objects; and create new rise-above notes, reference notes, and headings. Also lets you organize how objects will be displayed and activate the Activity graph.
Activity graph	3.5.5	Displays monthly information on the notes in the current view.
Notes	3.3.1, 4, 5	Shows notes connected to this view.
Attachments	3.3.2, 7	Shows attachments connected to this view.
Movies	3.3.3, 8	Shows movies connected to this view.
View links	3.3.4, 6	Shows links to other views connected to this view.
View Information	3.3.5	Provides information about the view's history.
View Authors	3.3.6	Shows who is responsible for this view.
External Link	3.3.7	Provides the URL of the view so users can access the view from a document outside Knowledge Forum.

Note: Editors and managers should see sections 12.4.1 and 12.4.2 to learn more about setting a group's home view.

The first view you see when you log on to Knowledge Forum is the home view. An editor or manager determines the home view for your group.

Note: See chapter 9 to learn more about the View List.

You can get a listing of all views in the knowledge base by clicking the **View List** button on the toolbar. You can use the View List to navigate through the knowledge base to specific views.





3.2 THE TOOLBAR

Note: See section 12.4.1 to learn more about setting the toolbar layout for a group. See section 12.3.1 to learn more about setting the toolbar layout for a user.

Along the left side of a view is the toolbar. The number of buttons appearing on the toolbar depends upon the privileges you have in the knowledge base.






The toolbar comes in a wide or narrow format. The toolbar layout is initially set for each group by an editor or manager. Users can then pick their own layout from the Edit Author window.

The toolbar is divided into three regions. The first region contains buttons that allow you to add objects to a view. These objects contain the content that is put in the database.



Toolbar Button	Name	Chapter Covered	Description
	New Note	4	Allows you to create a new note.
	New View Link	6	Allows you to add a view link to the view.
	New Attachment	7	Allows you to add an attachment to the view.
	New Movie	8	Allows you to add a movie to the view.

3 VIEWS

The next group of buttons open new windows that allow you to view the database or change parameters in the database.

Toolbar Button	Name	Chapter Covered	Description
	View List	9	Allows you to find or create a view.
	Search	10	Allows you to search for objects in the database.
	My Reader	11	Opens a temporary storage place called My Reader. There you can select, read, and sort several notes at once.
	Authors	12	Allows you to view the authors and groups that make up the knowledge-base community. Allows editors and managers to create or edit authors, groups, and registration codes.
	Scaffolds	13	Allows you to view scaffolds. Allows editors and managers to create or edit scaffolds.

The last section of the toolbar allow you to get help or exit.

Toolbar Button	Name	Where Covered	Description
	Help		Provides online help.
	Logout	2.4	Allows you to exit Knowledge Forum and return to the “Welcome to Knowledge Forum” window. From there you can to log on to a different database, allow a different user to log on, or quit.

3.3 VIEW CONTENT

Views can contain notes, attachments, movies, and links to other views. Depending upon your user type, you can add or edit these objects. Views also display information regarding their history and authorship, and include an external link.

3.3.1 NOTES

Note: See chapters 4 and 5 to learn more about notes.

Note: All editors and managers are considered to be authors.

Notes added to a view are listed in the view window. You can create a note by using the **New Note** button on the toolbar. Clicking the title link of a note will open it in read mode. Clicking the *edit* link after the note’s title will open it in write mode. Only the note authors can see the *edit* link. Authors can make changes to a note in write mode.



A note in a view

3.3.2 ATTACHMENTS

Note: See chapter 7 to learn more about attachments.

Attachments added to a view are listed in the view window. You can create an attachment by using the **New Attachment** button on the toolbar. Clicking the title link of an attachment will open it—if you have the application used to create the attachment on your computer. Clicking the *edit* link after the attachment’s title will allow you to change the attachment’s title or authorship. Only the attachment authors can see the *edit* link.



An attachment in a view

3.3.3 MOVIES

Note: See chapter 8 to learn more about movies.

Note: All editors and managers are considered to be authors.

Movies added to a view are listed in the view window. You can create a movie by using the **New Movie** button on the toolbar. Clicking the title link of a movie will open it. Clicking the *edit* link after the movie's title will allow you to change the movie's title or authorship. Only the movie authors can see the *edit* link.

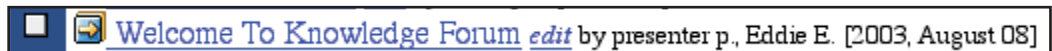


A movie in a view

3.3.4 VIEW LINKS

Note: See chapter 6 to learn more about view links. See section 9.4 to learn more about creating views.

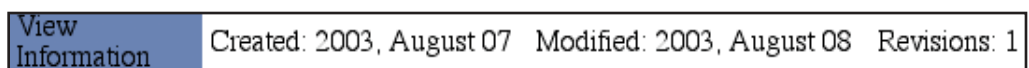
View links connect you to other views, allowing you to move easily from one view to another. You can create a view link by using the **New View Link** button on the toolbar. Clicking a view link takes you to that view. Clicking the *edit* link after the view's title will let you edit that view's parameters. Only the view authors can see the *edit* link.



A view link in a view

3.3.5 VIEW INFORMATION

The **View Information** section contains information compiled about the current view. It shows the date created, the last date modified, and the number of revisions.

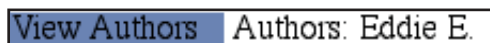


View Information

3.3.6 VIEW AUTHORS

Note: See section 9.5 to learn more about editing views.

The **View Authors** section lists the users who are responsible for the view. View authors may edit the view by accessing the Edit View window and making changes to the view settings. Editors and managers can also edit views.



View Authors

3.3.7 EXTERNAL LINK

The external link allows you to open, download, copy, or add a link for the URL to an outside setting.

External Link [View URL for external use](#) (Copy with browser's "Copy Link" function.)

External Link

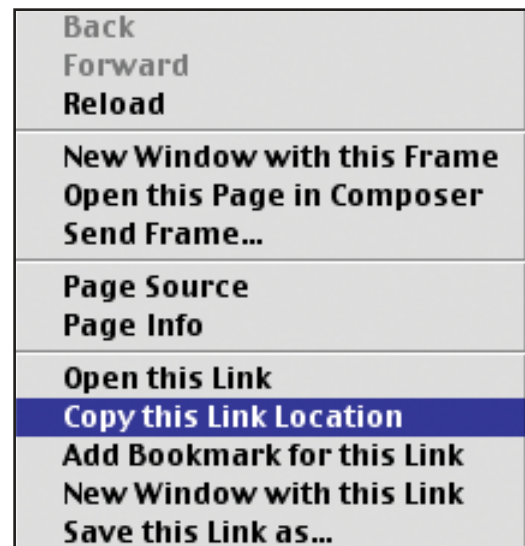
Note: You can create an external link from a view or a note in read mode.

To create an external link:

- 1a. Click and hold the [View URL for external use](#) link (Macintosh).
Or
- 1b. Left-mouse click the [View URL for external use](#) link (Windows).
2. Select option.



External Link options in Internet Explorer



External Link options in Netscape

Note: See section 12.4.7 to learn more about entering Knowledge Forum as an anonymous reader.

For example, you can copy this link to a clipboard, open a different application, and paste the link into the a new document, providing you with an external link to the view. Users that click the external link must log on to Knowledge Forum before arriving at an unpublished linked view. Users that click a link to a published view do not need to log on to Knowledge Forum if the anonymous reader is set up. They can go directly to the linked view as a reader.

To enter Knowledge Forum as a reader using an external link:

1. Click the external link.
2. Log on to Knowledge Forum if necessary.

Note: See section 2.1.1 to learn more about logging on to Knowledge Forum.

The linked view appears.

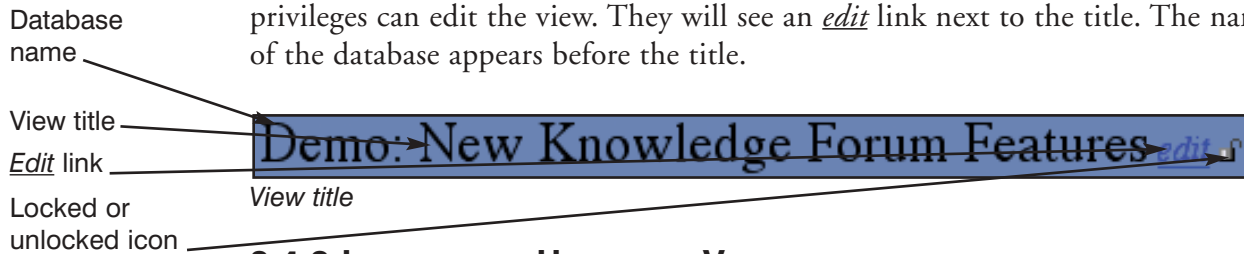
3.4 ADDITIONAL VIEW FEATURES

Views include a title, can be locked to other users, and come in several varieties.

Note: See section 9.4 to learn more about view settings.

3.4.1 VIEW TITLE



Every view has a title, which is set by the view author. Those with authorship privileges can edit the view. They will see an *edit* link next to the title. The name of the database appears before the title.



3.4.2 LOCKED AND UNLOCKED VIEWS

View authors can also lock and unlock views. An icon appears next to the view title, indicating whether the view is locked or unlocked.

Note: See section 9.4.2 to learn more about locked views.

Status	Icon	Description
Locked		No changes can be made to the view. Locking a view removes the New Note , New View Link , New Attachment , and New Movie buttons from the toolbar, since those functions are no longer available.
Unlocked		Users can make changes to an unlocked view as their user type allows. For instance, visitors, writers, editors, and managers can add notes, view links, attachments, and movies to an unlocked view.

To lock a view:

- Click  next to the view title.

To unlock a view:





- Click  next to the view title.

3.4.3 VIEW TYPES

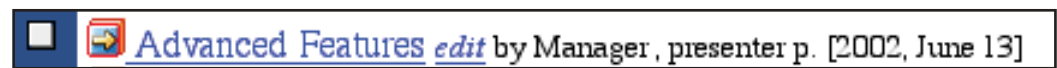
Views have specific states that affect how certain types of users can interact with them. View authors can set each view's permission level, which determines what user types can see the view.

Note: See section 9.4.4 to learn more about setting the permission level for a view.

Note: Since users can see different types of views, the View List may appear different for each user. See section 9.3 to learn more about the View List.

View Type	Icon	View Accessible To
Working	 (blue)	Writers, editors, and managers
Editor	 (gray)	Editors and managers
Published	 (blue)	Readers, visitors, writers, editors, and managers
Private	 (gold)	Specifically designated view authors and all managers

A red border surrounding a view icon indicates that the view contains notes that you have not read, or notes that have been modified since you last read them.



Link to a view with unread or modified notes

Note: See chapter 11 to learn more about moving objects to My Reader. See section 5.2.1 to learn more about creating a new reference note. See section 5.5.1 to learn more about creating a rise-above note.

3.5 WORKING IN A VIEW

You can use a view's Action bar to perform a number of tasks. Using the **Do Action** drop-down list you can move objects to My Reader, clear objects from the view, delete objects from the view, create a new rise-above note, create a new reference note, create headings for the view, and copy objects to other views. You can display the Activity graph, which displays data on your viewing activity. You can also set objects to display in different ways.

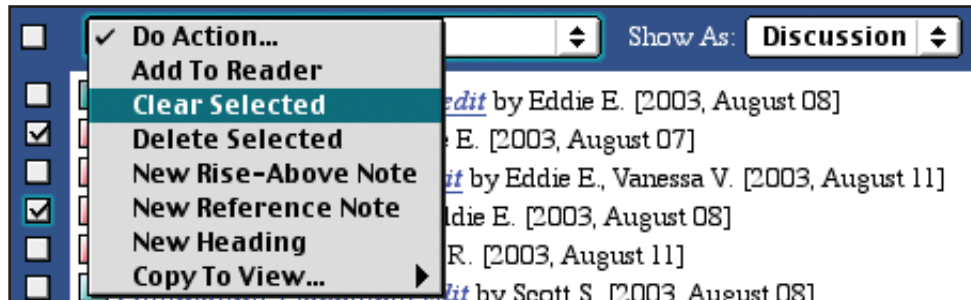
3.5.1 CLEARING OBJECTS FROM A VIEW

You can remove an object from a view, provided you are an author of the object.

To clear objects from a view:

1. Click the check box to the left of each object you want to clear.
2. Select **Clear Selected** from the **Do Action** drop-down list.

Tip: To select all objects in the view, click the check box to the left of the **Do Action** drop-down list. To clear the selection of an object in the view, click the checked check box to the left of the object.



Clearing selected object

Note: See section 10.3.2 to learn more about searching for cleared objects.

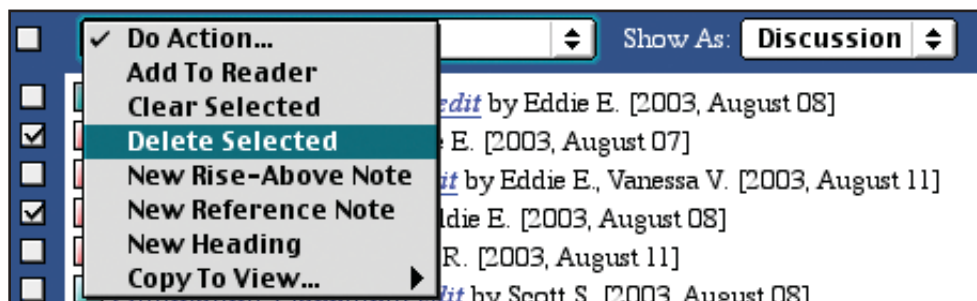
Cleared objects are removed from the view, but will remain active in the database. If a cleared object is located in a heading, it will remain in the heading. If a cleared object is located on more than one view, it will still exist on the other views. Cleared notes can come up in searches performed by writers, editors, and managers. Editors and managers can also search specifically for cleared notes.

3.5.2 DELETING OBJECTS FROM A VIEW

You can delete an object from a view, provided you are an author of the object.

To delete objects from a view:

1. Click the check box to the left of each object you want to delete.
2. Select **Delete Selected** from the **Do Action** drop-down list.



Deleting selected object

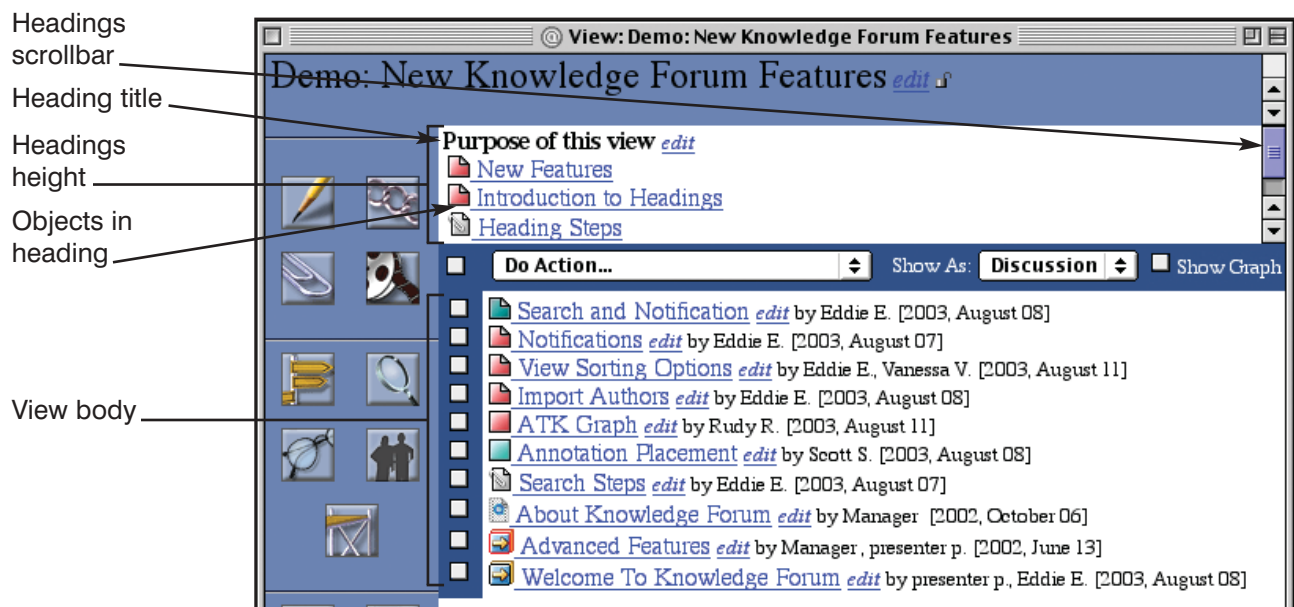
3 VIEWS

Note: See section 10.3.3 to learn more about searching for deleted objects.

Deleted objects are removed from the database. If the object is located in a heading of the view or on other views in the database, it will be removed from those locations as well. Editors and managers can search for deleted notes.

3.5.3 USING HEADINGS

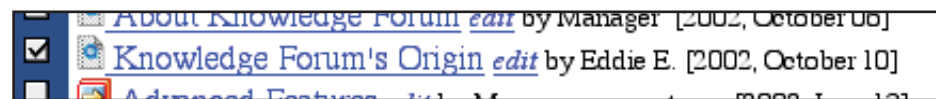
Headings allow you to highlight and organize Knowledge Forum objects above the main body of the view. It is a way for view authors to control part of the view that cannot be changed by most other users. View authors can add multiple headings to a view and edit them. Headings contain a title, are displayed in a column or row format, display image attachments or movies, and can be listed in any order you wish. You can also adjust the height of the heading area and activate a headings scrollbar.



Heading in view

To create a heading for a view:

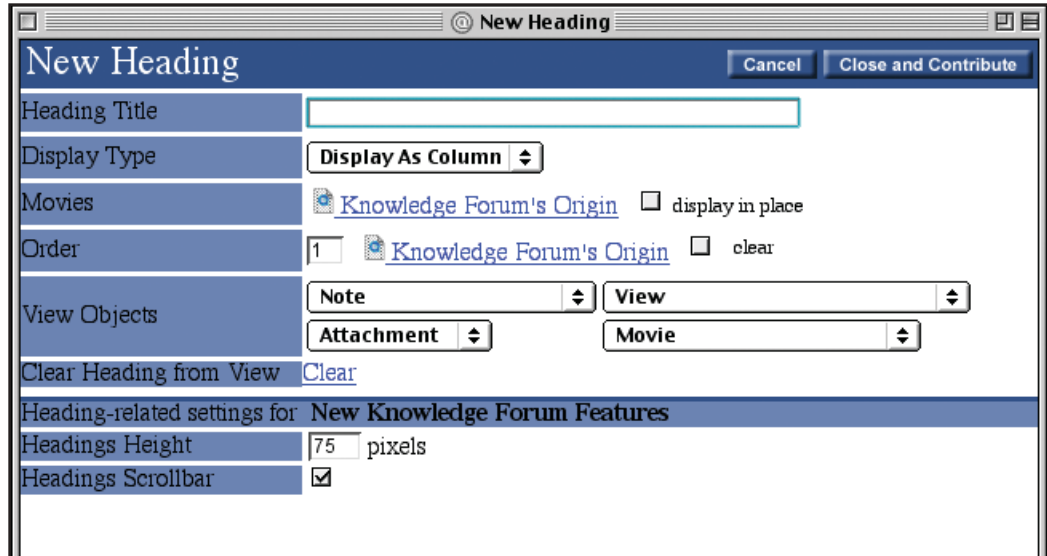
1. Click the check box to the left of each object from the body of the view that you want in the heading.



Object selected

2. Select **New Heading** from the **Do Action** drop-down list. The New Heading window appears with the selected objects listed in the **Order** section.

Tip: If you do not select any objects for the heading in step 1, you need to select them from the New Heading window as described in step 5.



New Heading window

3. Type a heading title in the **Heading Title** field.
4. Select a display type from the **Display Type** drop-down list. The initial default is **Display As Column**.
5. Select additional Knowledge Forum objects to display in the heading from the **Note**, **View**, **Attachment**, and **Movie** drop-down lists (optional). You can only choose from objects already in the view.
6. The selected objects will appear in the **Order** section in the sequence you chose them. If necessary, change the order by typing a new order number next to the object in the **Order** section.
7. Selecting an image attachment adds an **Image Attachments** section to the window. Check the **display in place** check box to display the image attachment in the heading (optional).
8. Selecting a movie adds a **Movies** section to the window. Check the **display in place** check box to display the movie in the heading (optional).
9. If necessary, change the number of pixels reserved for the height of the heading area in the **Headings Height** section.
10. If necessary, check or uncheck the **Headings Scrollbar** check box to include or not include a headings scrollbar.
11. Click **Close and Contribute**.

Note: The **Headings Height** and **Headings Scrollbar** settings impact the entire Heading area of the view, not just the heading you change the settings on.

3 VIEWS

Tip: You may need to adjust the pixels setting in the **Headings Height** field after seeing how the headings fit in the headings area.

Tip: Objects added to a heading will appear in both the heading and the main body of the view. Clearing an object from a view will not clear it from the heading. See section 3.5.1 to learn more about clearing objects from a view.

The heading is added to the view.

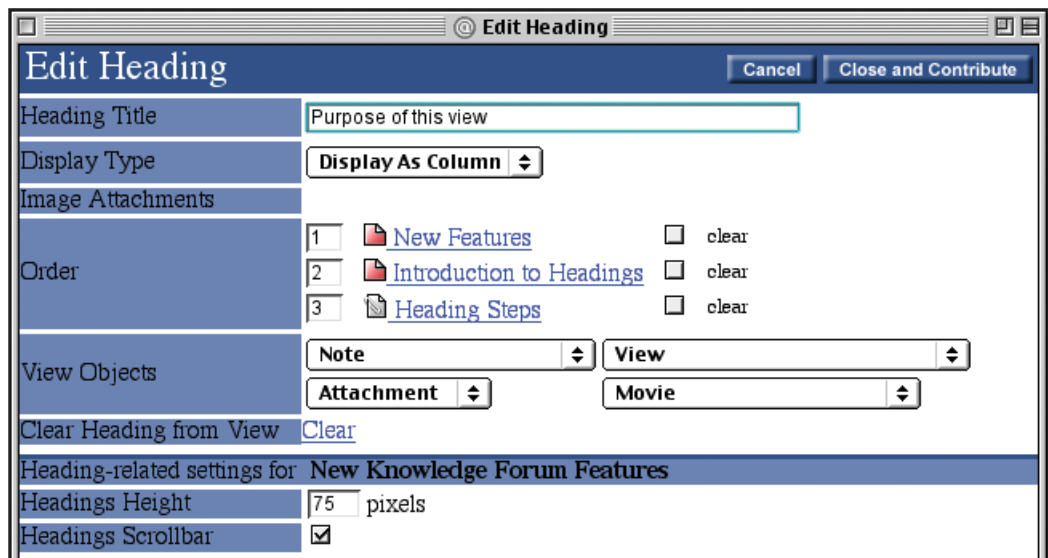


New heading in view

You can edit a heading's settings. This is done from the Edit Heading window.

To edit a heading for a view:

1. Click *edit* next to the heading to be edited. The Edit Heading window appears.



Edit Heading window

2. Edit the heading as needed.
3. Check the **clear** check box to remove an object from the heading (optional).
4. Click **Close and Contribute**.

Clearing an object just removes it from that specific heading. An object cleared from one heading will still remain in the main body of the view or in other headings.

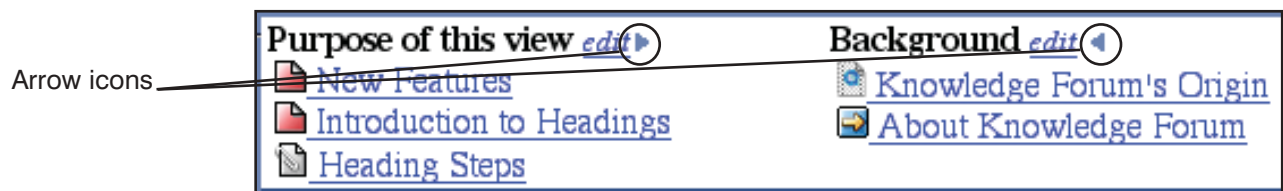
You can clear an entire heading from the view. This is also done from the Edit Heading window. If you clear the view heading and an object exists in both the view heading and the view body, the object will remain in the view body.

Note: Once a heading is cleared, you cannot get it back.

To clear a heading from a view:



1. Click *edit* next to the heading to be removed. The Edit Heading window appears.
2. Click Clear in the **Clear Heading from View** section.

If you have multiple headings, you can use the arrow icons to the right of the heading title to move the headings up or down.



Arrow icons in a view heading

To change the order of the headings in a view:

- Click  to move a heading up.
- Click  to move a heading down.

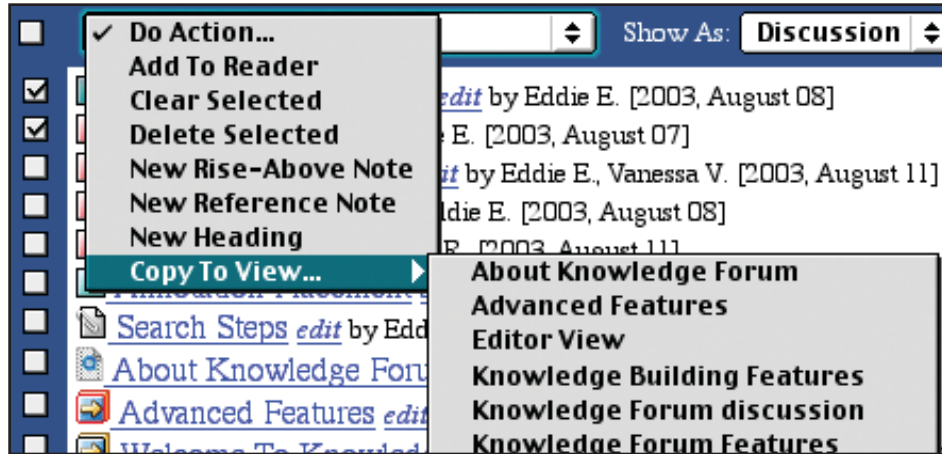
Tip: To select all objects in the view, click the check box to the left of the **Do Action** drop-down list. To clear the selection of an object in the view, click the checked check box to the left of the object.

3.5.4 COPYING OBJECTS TO A VIEW

You can copy objects to another view.

To copy objects to a different view:

1. Click the check box to the left of each object you want to copy.
2. Select a view under *Copy To View* from the **Do Action** drop-down list.



Copying selected object to another view

Note: See section 3.5.1 to learn more about clearing objects from a view.

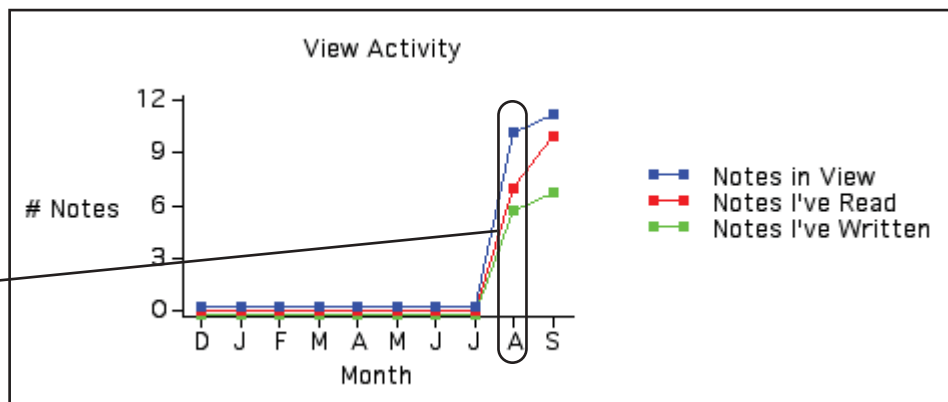
Note: The Activity graph also appears on the View List window. See section 9.3.5 to learn more about the Activity graph on the View List window.

Your view window will change to the new view. The object will exist on both views. If you do not want the object to appear in both views, clear it from the original view.

3.5.5 DISPLAYING THE ACTIVITY GRAPH

The Activity graph displays information on the notes in the current view. It shows monthly data on the number of notes in the view, the number of notes you have read in the view, and the number of notes you have written in the view. Ten months worth of note data is displayed. You can use the **Show Graph** check box on the Action bar to show or hide the graph.

This view was created in August, yet the database has been active since at least December.



Activity graph

Note: The **Show Graph** check box may not appear on your Action bar if **Activity Graphs** is not enabled on your Edit Author window. See section 12.3.1 to learn more about editing your author information.

To show or hide the Activity graph:

- Check or uncheck the **Show Graph** check box to show or hide the graph.

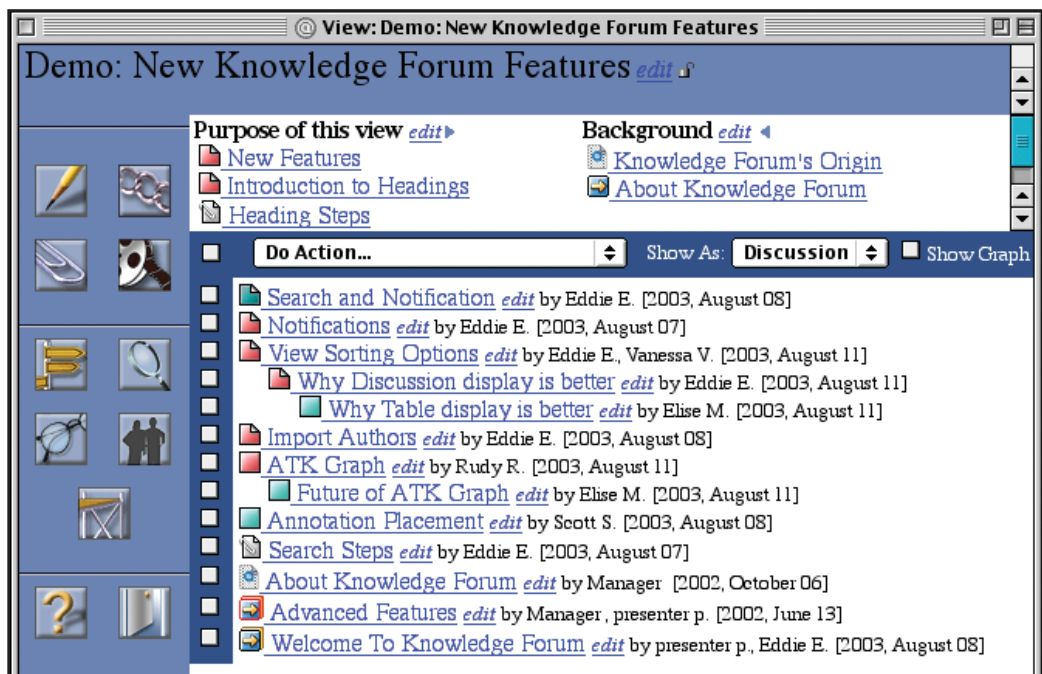
3.5.6 DISPLAYING OBJECTS IN A VIEW

You can display notes in a view grouped by discussion or display all objects in a table format. The display options are found in the **Show As** drop-down list on the Action bar. The sorting options are *Discussion* and *Table*.

Discussion groups notes by their build-on relationship. This is the default setting. Knowledge Forum sorts the list, grouping notes and build-on notes in order of date created from the first to the last. Attachments, movies, and view links are listed, in that order, after notes.

To display objects in a view by discussion:

- Select *Discussion* from the **Show As** drop-down list.



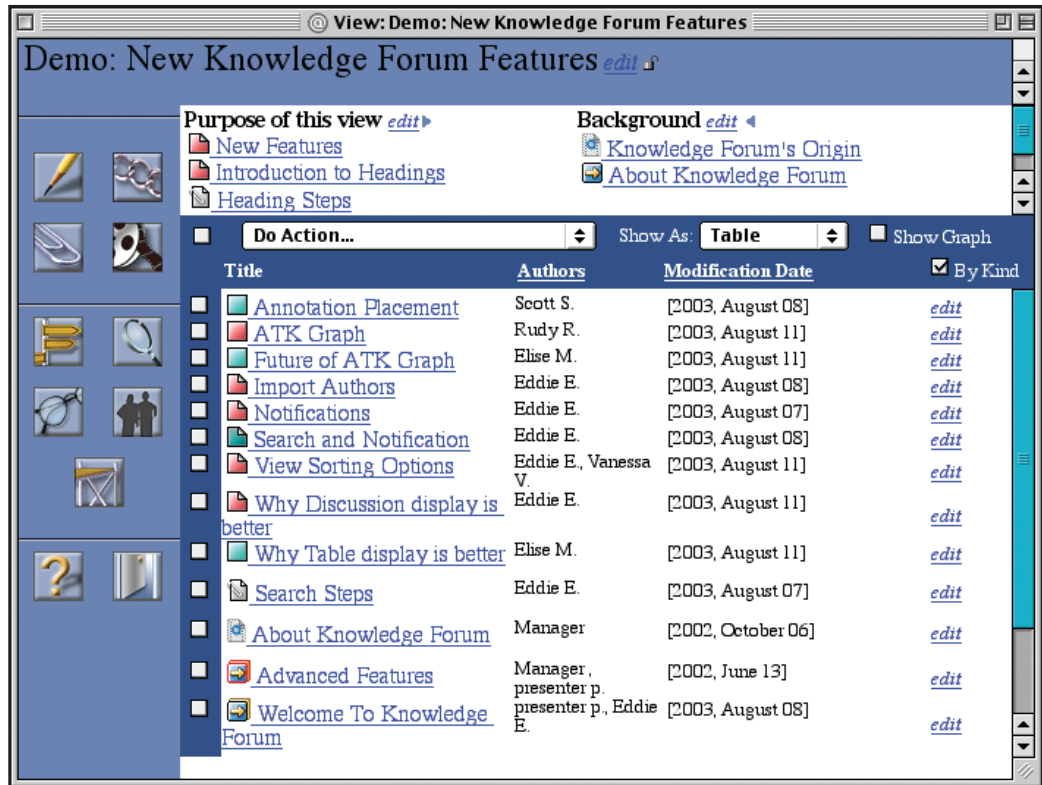
Organized by discussion

Table displays notes, attachments, movies, and view links either by author (alphabetically), title (alphabetically), or modification date (starting with the most recent). You determine which method to use by clicking on the corresponding column header. The **By Kind** check box also appears when *Table* is selected. If checked, notes will be grouped with notes, attachments with attachments, movies with movies, and view links with view links. Each object type will be listed in order of the selected column header. If unchecked, the objects will be mixed together and listed solely by the selected column header.

3 VIEWS

To display objects in a view as a table and group by object type:

1. Select *Table* from the **Show As** drop-down list.
2. Check the **By Kind** check box.
3. Click the column header you want to sort by.



Show as a table by kind, alphabetically by title

To display objects in a view as a table, but not grouped by object type:

1. Select *Table* from the **Show As** drop-down list.
2. Uncheck the **By Kind** check box.
3. Click the column header you want to sort by.

3 VIEWS

The screenshot shows a web application window titled "View: Demo: New Knowledge Forum Features". The main content area displays a list of forum posts in a table view. The table has columns for "Title", "Authors", "Modification Date", and "By Kind". The posts are sorted alphabetically by title. The "By Kind" column is currently unchecked.

Title	Authors	Modification Date	By Kind
About Knowledge Forum	Manager	[2002, October 06]	<input type="checkbox"/>
Advanced Features	Manager, presenter p. Scott S.	[2002, June 13]	<input type="checkbox"/>
Annotation Placement	Rudy R.	[2003, August 08]	<input type="checkbox"/>
ATK Graph	Elise M.	[2003, August 11]	<input type="checkbox"/>
Future of ATK Graph	Eddie E.	[2003, August 11]	<input type="checkbox"/>
Import Authors	Eddie E.	[2003, August 08]	<input type="checkbox"/>
Notifications	Eddie E.	[2003, August 07]	<input type="checkbox"/>
Search and Notification	Eddie E.	[2003, August 08]	<input type="checkbox"/>
Search Steps	Eddie E.	[2003, August 07]	<input type="checkbox"/>
View Sorting Options	Eddie E., Vanessa V.	[2003, August 11]	<input type="checkbox"/>
Welcome To Knowledge Forum	presenter p., Eddie E.	[2003, August 08]	<input type="checkbox"/>
Why Discussion display is better	Eddie E.	[2003, August 11]	<input type="checkbox"/>
Why Table display is better	Elise M.	[2003, August 11]	<input type="checkbox"/>

Show as a table alphabetically by title, but not by kind



4 NOTES

4.1 INTRODUCTION TO NOTES

The note is the key communication device in Knowledge Forum. Notes serve to present ideas—whether in text, graphics, animation, charts, graphs, or some other form of expression.

Notes can be linked to concepts through:

- Scaffolds
- Keywords
- Problems
- Views

Notes can contain:

- Text or graphics
- Attachments
- Movies

Notes can be shared with others by:

- Co-authoring
- Publishing
- Locating them in different views

Notes can be connected in several ways:








- Build-On: Allows a user to build on a colleague's ideas.
- Reference: Allows a user to quote a colleague's words, reference a complete note, reference a view, or reference a Web page.
- Rise-Above: Allows a user to collect a set of notes and write a concept that "rises above" all the notes. The rise-above note includes all the concepts in the gathered notes and makes a knowledge advance.

Notes can be commented on using:

- Annotate: Allows a user to add a comment to another user's note.

Note: See chapter 5 to learn more about how notes are shared, connected to, and commented on.

Notes can appear in views and other notes in a number of different states.

Note State	Icon	Description
Read		Indicates that you read the note and it has not changed since you last opened it. (Light red.)
Unread		Indicates that you have not opened the note. (Light blue.)
Modified		Indicates that you opened the note before, but it has changed since then. (Darker blue.)
Author		Indicates that you authored the note. (Corner flipped down.)
Candidate for publication		Indicates that the note is nominated for publication.
Published note		Indicates that the note is finished and of sufficient quality to be published.
Rise-above note		Indicates that the note contains other notes.

4.2 OPENING A NOTE

Note: All editors and managers are considered to be authors.

Notes can be opened in read mode by all user types, or in write mode by the note authors.

4.2.1 OPENING A NOTE IN READ MODE

No changes can be made to a note in read mode, it can only be viewed. Clicking the note icon or title opens a note in read mode.

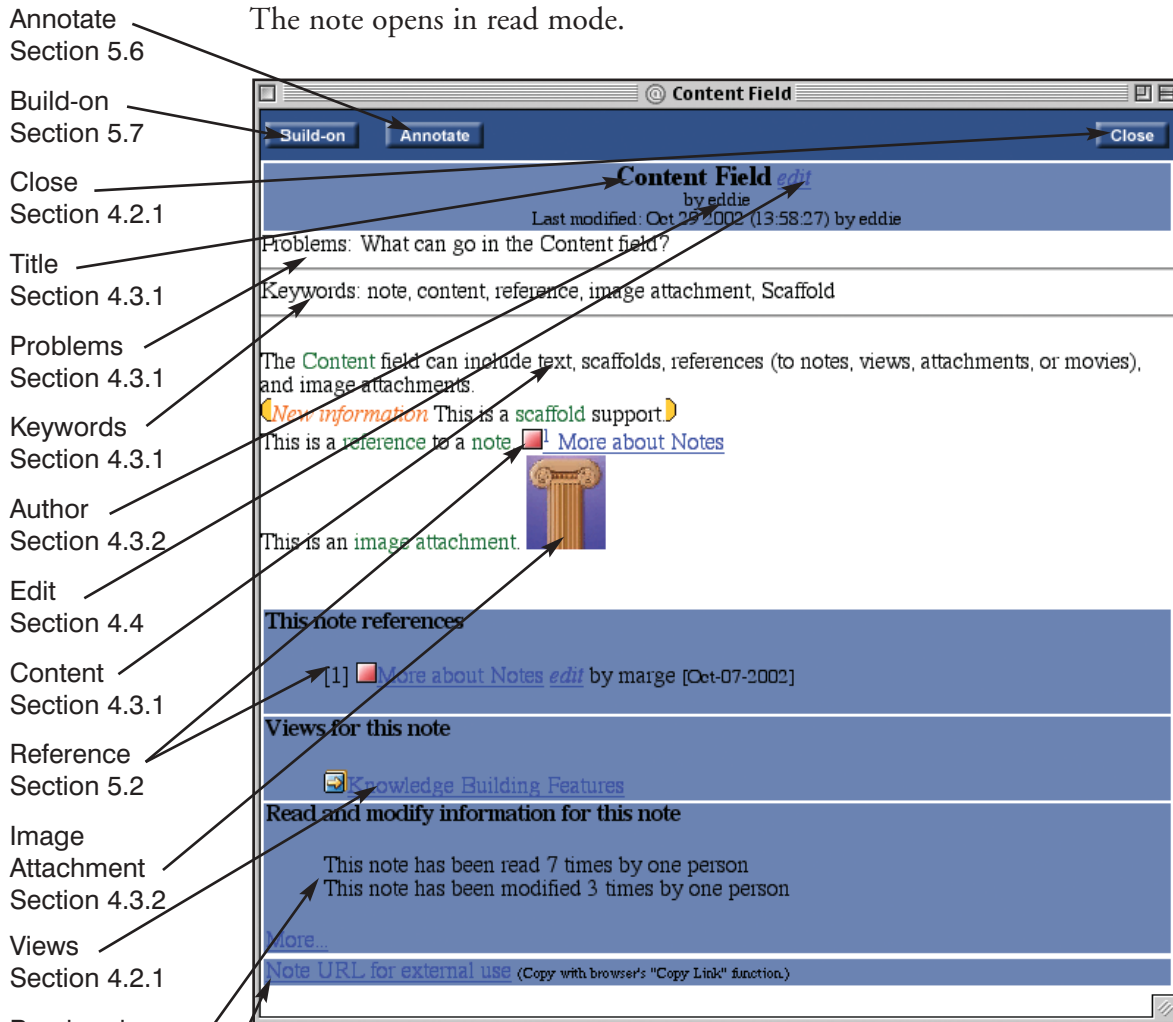


Note icon and title

To open a note in read mode:

- Click the note's title or icon.

The note opens in read mode.



Build-on
Section 5.7

Close
Section 4.2.1

Title
Section 4.3.1

Problems
Section 4.3.1

Keywords
Section 4.3.1

Author
Section 4.3.2

Edit
Section 4.4

Content
Section 4.3.1

Reference
Section 5.2

Image Attachment
Section 4.3.2

Views
Section 4.2.1

Read and Modification Information
Section 4.2.1

External Link
Section 3.3.7

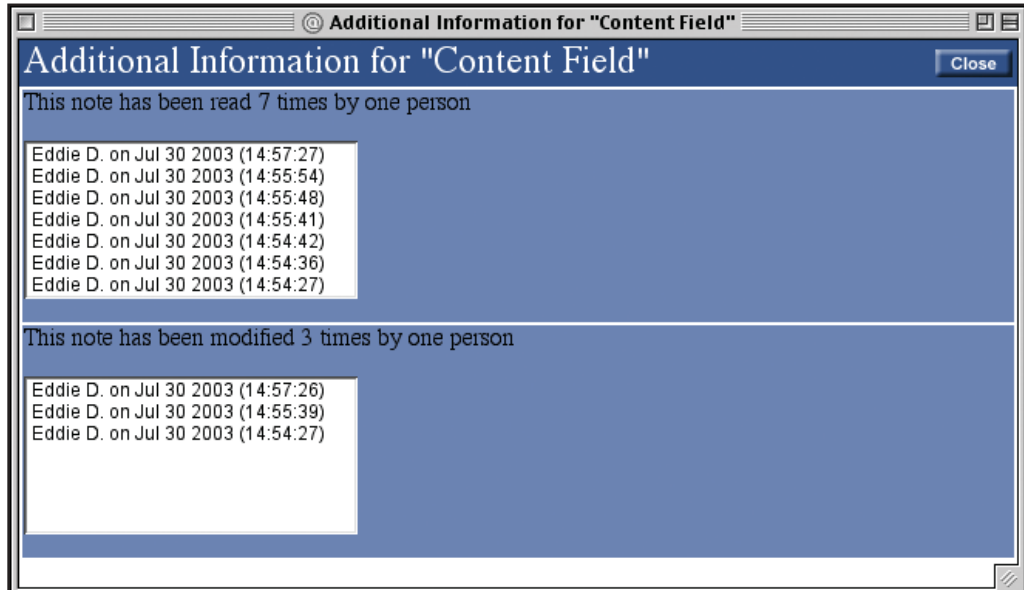
Note in read mode

A note in read mode displays problems, keywords, and content. Knowledge Forum lists each note referenced by the note in the **This note references** section, and view links to each view in which the note appears in the **Views for this note** section. As with a view, a read-mode note also contains an external link.

Additionally, you can access two logs from a read-mode note: one showing who has read the note, and another showing who has modified the note. These logs are summarized in the **Read and modify information for this note** section and accessed by clicking the More link.

To access the read and modify information logs for a note in read mode:

- Click the More link in the **Read and modify information for this note** section. The “Additional Information for ‘*note title*’” window appears.



“Additional Information for ‘*note title*’” window

To close the “Additional Information for ‘*note title*’” window:

- Click .

To close a note in read mode:

- Click .

4.2.2 OPENING A NOTE IN WRITE MODE

Note: All editors and managers are considered to be authors.

Authors can open a note in write mode and make changes to the note. You can open a note in write mode by using the edit link next to the note’s title on the view, or next to the note’s title in read mode. Only note authors can see the edit link.



Link to write mode for a note from a view



Link to write mode from a note in read mode

To open a note in write mode (from the view window or from the note in read mode):

- Click the *edit* link next to the note's title.

Cancel — The note opens in write mode.
Section 4.3.1

Advanced —
Section 4.3.2

Title —
Section 4.3.1

Close and
Contribute —
Section 4.3.1

In View —
Section 4.3.1

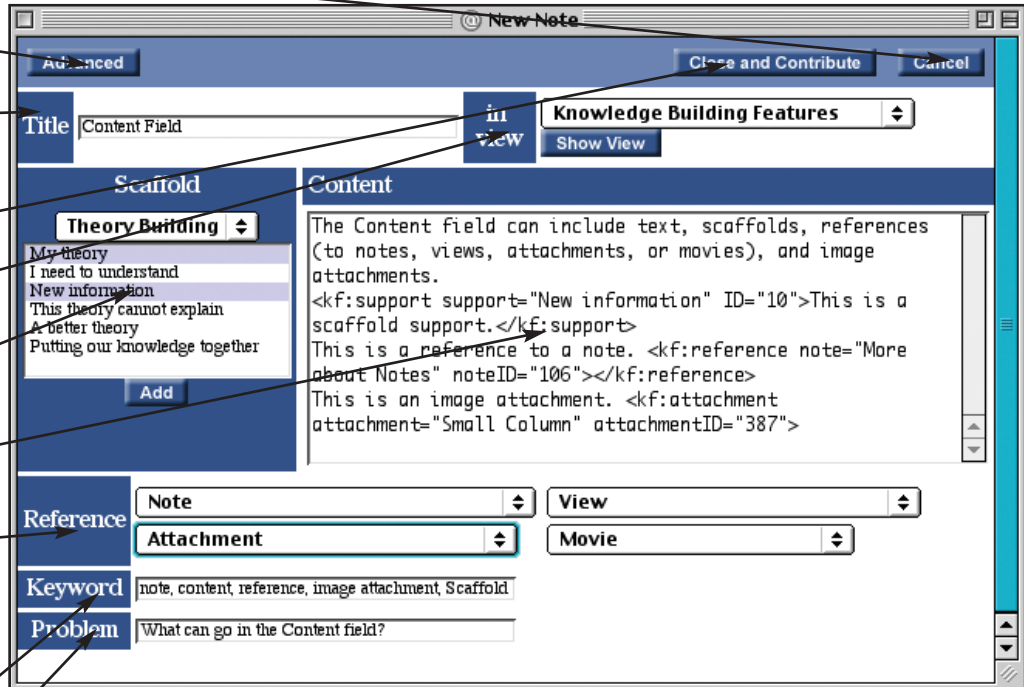
Scaffold —
Section 4.3.1

Content —
Section 4.3.1

Reference —
Sections 5.2
(Note and
View), 7.3
(Attachment),
and 8.3 (Movie)

Keywords —
Section 4.3.1

Problems —
Section 4.3.1



Note in basic write mode

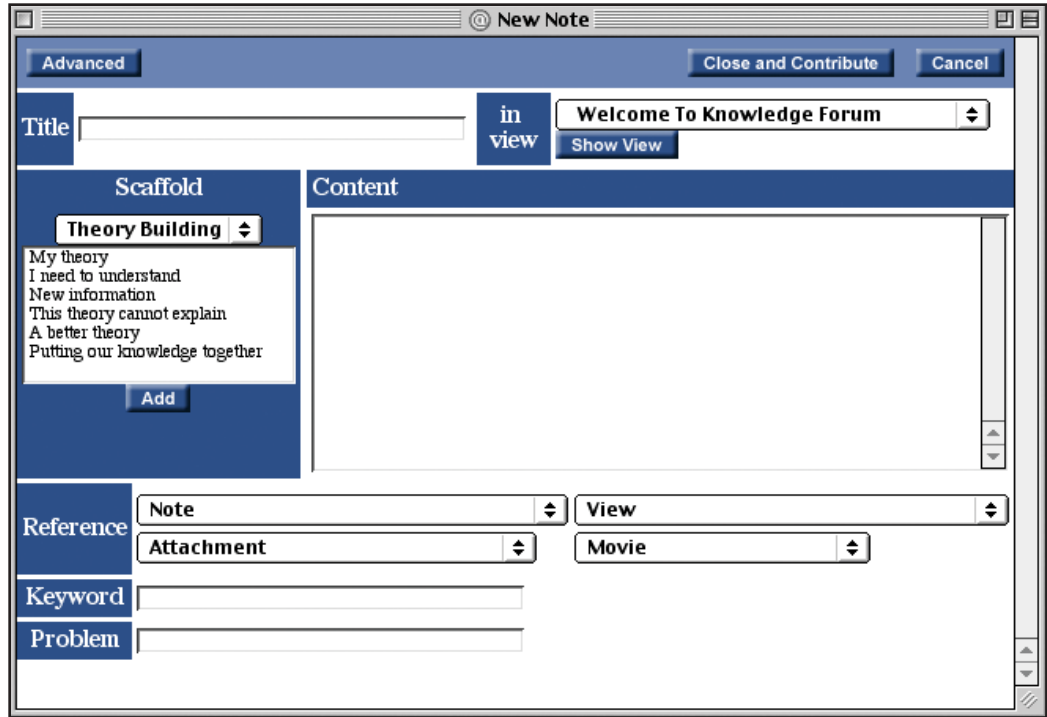
4.3 CREATING A NEW NOTE

A note in write mode has basic and advanced features. By default, when you create a new note, the New Note window will display the basic features. You can toggle between the basic and advanced versions of the New Note window by clicking the **Advanced** or **Basic** button at the upper-left corner of the window. The advanced version of the New Note window will include the basic features plus the advanced features.

To create a note:



1. Click . The New Note window appears.

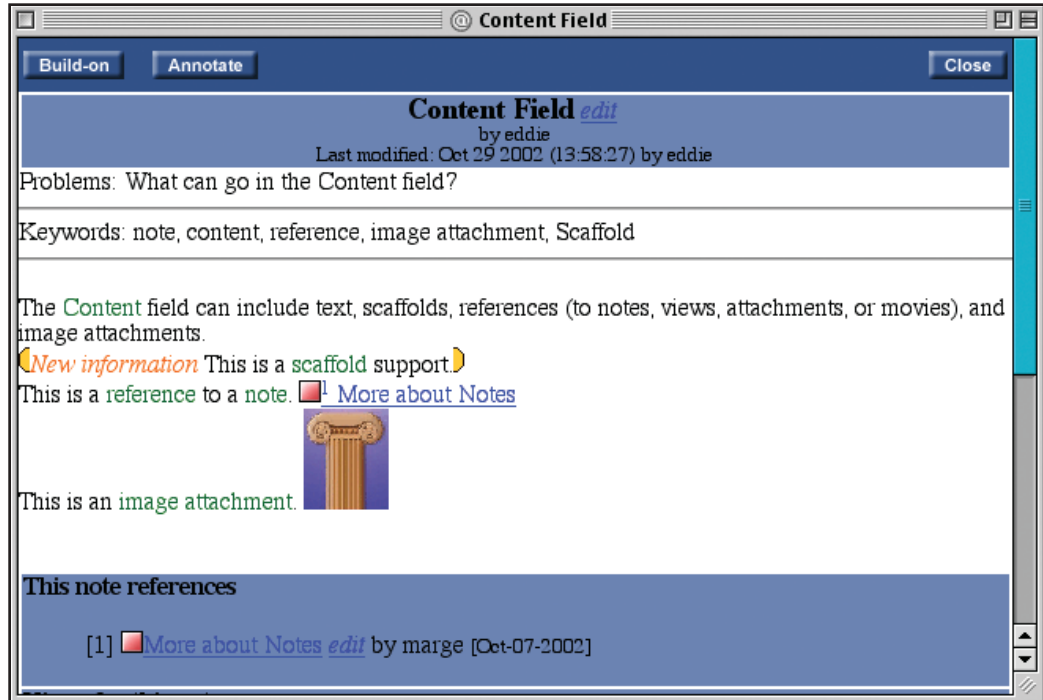


New Note window

Note: See sections 4.3.1 and 4.3.2 to learn more about the basic and advanced features.

2. Complete the basic and advanced features as needed.
3. Click **Close and Contribute**.

The note appears in read mode and is added to the view.



New note in read mode

4.3.1 USING BASIC FEATURES

Opening a note in write mode displays the basic version of the note. The basic version of the New Note window includes the fields most commonly used when creating a note. You do not need to complete every basic field to create a note.

The following sections describe the basic features of the note in more detail.

TITLE

You must enter a title for the note. Titles should communicate to the knowledge-base community what your note is about.

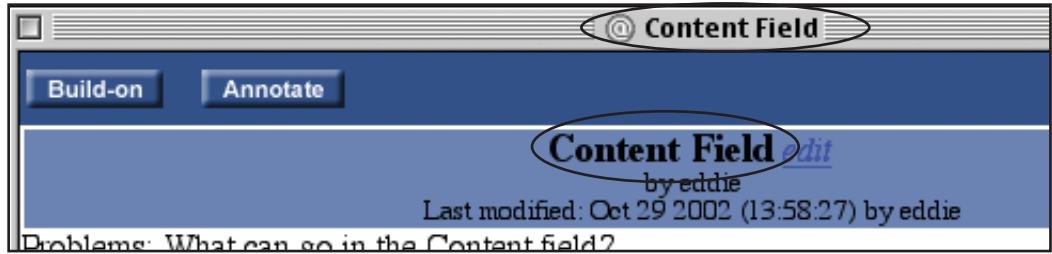
To add a title:

- Type the title in **Title** field.



Title added

The title of the note appears on any view containing the note and at the top of the note in read mode.



Note title

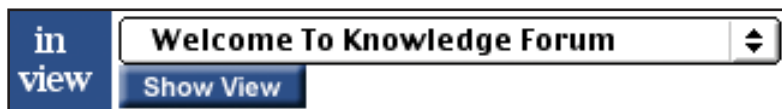
IN VIEW

Tip: You can look at the view chosen in the **in view** drop-down list by clicking the **Show View** button. The selected view will display in the view window.

While your note will default to the current view, you do not have to add it to that view. You can select a different view to add the note to from the **in view** drop-down list.

To choose a different view to add the note to:

- Select the view to add note to from the **in view** drop-down list.



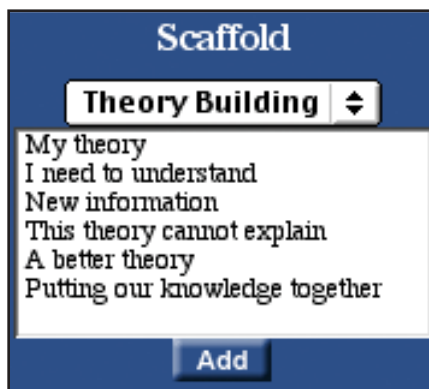
In view section

After you contribute the note, you will go to the selected view window.

SCAFFOLD

Note: See chapter 13 to learn more about creating scaffolds.

Scaffolds and scaffold supports help organize your writing. Each scaffold has several supports listed under it. For example, the Theory Building scaffold includes supports such as *My theory*, *I need to understand*, and *New information* that you can use to clearly identify sections of your note content.



A scaffold and its supports

4 NOTES

Note: See chapter 10 to learn more about searches.

Scaffolds can also help you find and identify notes written by colleagues. You can search for notes by scaffold supports to locate all notes that use a particular scaffold.

To select a scaffold and scaffold supports:

1. Choose a scaffold type from the **Scaffold** drop-down list.
2. Select a scaffold support from **Scaffold** list box.
3. Click **Add**. The scaffold's HTML code will appear in the **Content** field.
4. Repeat steps 2 and 3 until all the scaffold supports you want are chosen.
5. Type the scaffold support text in the **Content** field between the > < signs of the scaffold support's HTML code.

A support is added to a note in write mode as HTML code in the **Content** field.

```
Content
<kf:support support="New information" ID="10"></kf:support>
```

Support HTML in **Content** field

It will appear formatted when the note is in read mode.



Support in read mode

Type between the > < signs to add content to your scaffold support.

```
Content
<kf:support support="New information" ID="10">Enter text here.</kf:support>
```

Content added to support in HTML

Your text will appear within the scaffold support in read mode.



Support content in read mode

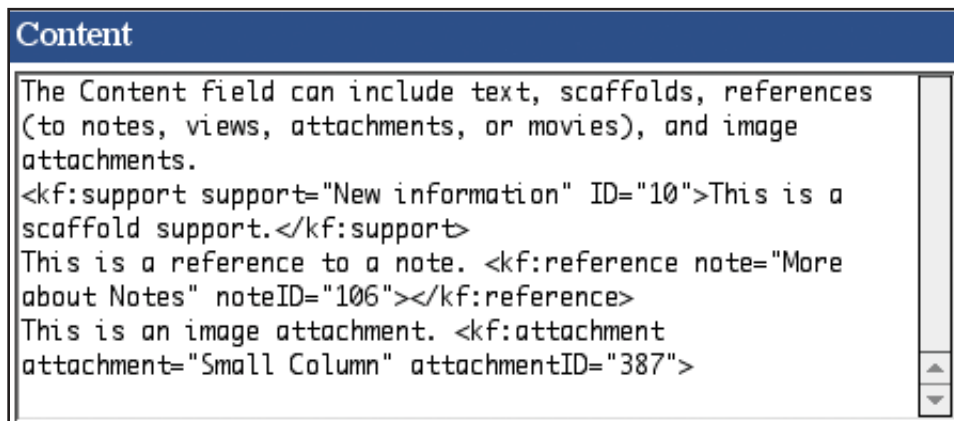
CONTENT

Note: See appendix A for HTML tips.

You can enter your ideas into the **Content** field of the note—whether or not you use scaffold supports. The **Content** field is quite flexible. You can use HTML commands in the **Content** field to change fonts, bold or italicize text, and more. HTML code for any references you select from the **Reference** section appear in your **Content** field as well.

To add content to a note:

- Type additional text in the **Content** field.

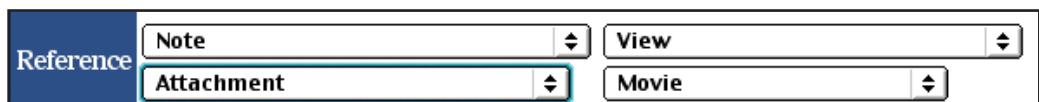


Content field

Note: See section 5.2.1 to learn more about referencing a note. See section 5.2.2 to learn more about referencing a view. See section 7.3 to learn more about referencing an attachment. See section 8.3 to learn more about referencing a movie.

REFERENCE

You can reference a note, view, attachment, or movie in a note from the **Reference** section.



Reference section

KEYWORD

Keywords help users identify important concepts in a note. You can type multiple keywords in the **Keyword** field. Multiple keywords should be separated with a comma. Keywords can be more than one word long (for example, *image attachment*).



To add a keyword:

- Type the keywords in **Keyword** field.

Keyword note, content, reference, image attachment, Scaffold

Keyword field

In read mode, keywords are listed in the **Keywords** section and appear in green in the note contents.

The **Content** field can include text, scaffolds, references (to notes, views, attachments, or movies), and image attachments.
New information This is a **scaffold** support.)
 This is a **reference** to a note.  [More about Notes](#)

 This is an **image attachment**.

Note in read mode with keywords highlighted in green

PROBLEM

A problem helps frame the note content.

To add a problem:

- Type the problem in the **Problem** field.

Problem What can go in the Content field?

Problem field

The problem appears in the **Problems** section in read mode.



Content Field

Build-on Annotate

Content Field [edit](#)
 by eddie
 Last modified: Oct 29 2002 (13:58:27) by eddie

Problems: What can go in the Content field?

Keywords: note, content, reference, image attachment, Scaffold



Note in read mode with problem and keywords

CONTRIBUTE NOTE

After entering the elements of the note, you need to contribute it to the knowledge base by clicking the **Close and Contribute** button. This is the only way to save your note to the database. If you decide not to contribute the note, you must cancel it or close the window.

To cancel or close a note without contributing (two options):

Option 1

1. Click  to cancel the note. A confirmation dialog box appears.
2. Click  to confirm cancelation.

Option 2

- Click  on the title bar to close the note.

4.3.2 USING ADVANCED FEATURES

Several advanced features are available to you when creating a note. You can select authorship, turn off or on the display of image attachments, promote notes for publication, and treat all **Content** field text as HTML code. All advanced features are optional.

You can toggle between the basic and advanced versions of the New Note window by clicking the **Advanced** or **Basic** button at the upper-left corner of the window.

To choose between basic and advanced note features in write mode:

- Click  or .

The advanced version of the New Note window includes the basic features plus the advanced features.

Basic
Section 4.3.1

Treat Content
as HTML
Section 4.3.2

Authors
Section 4.3.2

Image
Attachments
Section 4.3.2

Publish
Section 4.3.2

Note with advanced features

When using the advanced features, follow the same steps used when creating a note using the basic features. However, before clicking the **Close and Contribute** button, perform any of the advanced features covered below.

AUTHORS

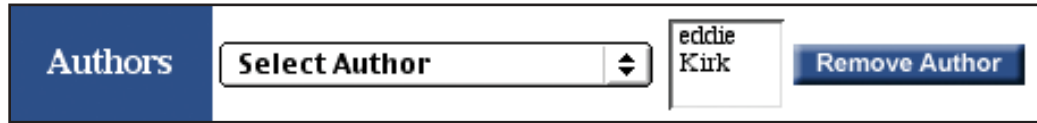
You can determine who gets author status for the note. Granting author status to other users allows them to edit the note—effectively making them co-authors. You can add individual authors or grant entire groups author status from the **Select Author** drop-down list. The **Select Author** drop-down list contains a list of groups, and each group has a sublist with the group name and individual group members. If you select the group name, every member of that group will gain author status for that note.

Note: See section 5.4 to learn more about co-authoring notes.

To add an author:

- Select an author or group from the **Select Author** drop-down list.

The new author or group appears in the **Authors** list.



Author added

You can also remove users from the **Authors** list.

To remove an author from the **Authors** list:

1. Select an author from the **Authors** list.
2. Click **Remove Author**.

IMAGE ATTACHMENTS

Note: See chapter 7 to learn more about attachments.

An image attachment is a type of attachment. An attachment is a document created in another program that has been added to the database and can be referenced in a note. An image attachment is a graphic image attachment in .jpg, .png, or .gif format added to a note in the **Content** field. By default, these images will appear as pictures in a read mode note. The **Image Attachments** option allows you to display the image as an attachment icon instead of as a picture in the **Content** field.

Each image attachment in write mode note will be listed in the **Image Attachments** section, followed by a **display in place** check box. A check mark in the check box indicates that the image attachment is displayed as a picture.

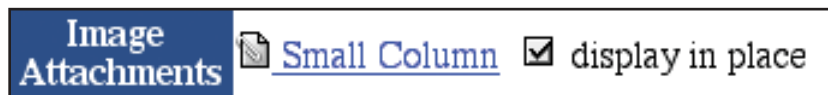


Image Attachments section



Note with image attachment displayed

To turn off the display of image attachments:

- Clear the selection of the **display in place** check box to the right of the image attachment's title.

In read mode, the image attachment changes to an attachment icon and the attachment's title. Clicking on the attachment's icon or title will display the image in a separate window.



Note with image attachment not displayed

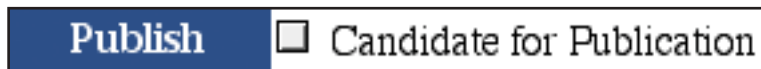
To turn on the display of image attachments:

- Click the **display in place** check box to the right of the attachment image.

PUBLISH

Note: See section 5.3 to learn more about publishing notes.

A published note indicates that the note is considered to be of high quality. Authors can make their notes a candidate for publication in the **Publish** section of a note in write mode. For a nominated note to become published, three other authors must sponsor the note.

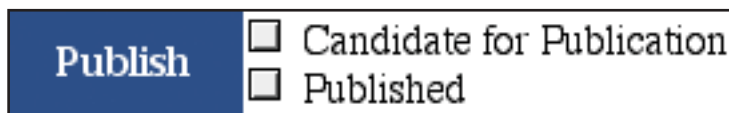


Publish section

To make a note a candidate for publication:

- Click the **Candidate for Publication** check box.

Editors and managers can publish a note immediately, without the sponsorship of other authors. They will see a **Published** check box in the **Publish** section of a note in write mode.



Publish section for editors and managers

To publish a note:

- Click the **Published** check box.

TREAT CONTENT AS HTML

You can make the entire **Content** field display as HTML by clicking the **Treat Content as HTML** check box. The main effect of this option is to turn off the automatic carriage return. The basic **Content** field allows you to use HTML and carriage returns. Treating all the content as HTML eliminates the carriage return. This may prove useful if you are creating a table or some other complex layout that can be set more precisely with HTML.



Treat Content as HTML check box

To treat content as HTML:

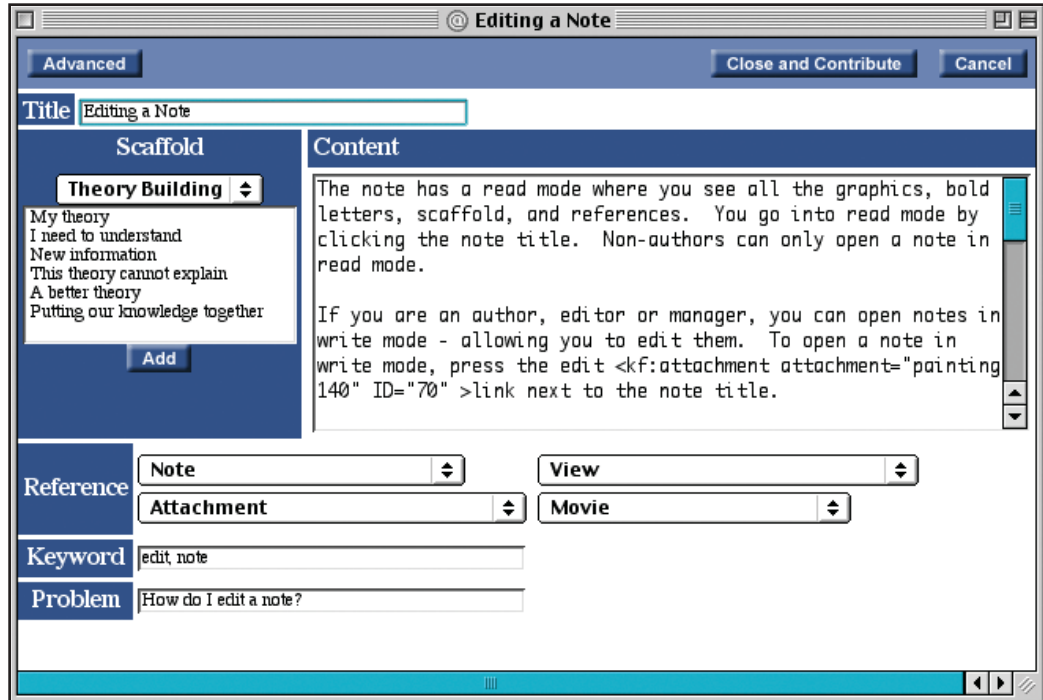
- Click the **Treat Content as HTML** check box.

4.4 EDITING A NOTE

You can edit notes you have authorship rights to in write mode. Basic and advanced fields can be edited in the same manner in which you created a note.

To edit a note (from the view window or from the note in read mode):

1. Click the *edit* link next to the note's title. The note opens in write mode.



Note in write mode

Note: See section 4.3 to learn more about the basic and advanced fields.

2. Edit the basic and advanced fields as needed.
3. Click **Close and Contribute**.

The edited note appears in read mode.



5 CONNECTIONS

5.1 INTRODUCTION: CONNECTING IDEAS

In addition to the focus on knowledge building, Knowledge Forum provides an emphasis on collaboration. Knowledge Forum can be thought of as a discourse medium because of the many ways in which the program promotes author interaction. The public nature of the database itself is perhaps Knowledge Forum's most significant collaborative feature. Since contributors can see all other contributors' work, there are opportunities for collaboration in Knowledge Forum that are not readily available in regular interaction. In many ways, the level of interaction in Knowledge Forum is superior to traditional "group work." Because all exchanges are accessible, there is the potential for the entire group to benefit from the dialogue. Unlike face-to-face discourse, which is transitory, computer-mediated communication preserves knowledge, allowing authors to move easily between their own ideas and the ideas of others, and to revisit their ideas so they may study them from a variety of perspectives.

Collaborative endeavors such as a review of previous work, the development of new ideas, and the synthesis of thought and discourse are not constrained by time or access.

5 CONNECTIONS

There are several features that allow you to connect notes (your ideas) to other notes, views, or Web pages. You can also respond to other authors and build on or annotate ideas to their note to build knowledge.

Connection Type	Description
Reference	Allows authors to reference other colleagues' work (a note) or another view. They may choose to reference the whole work or to quote a portion of the work. The quote or reference is added to the author's note, and a reference to the source note is stored automatically. Authors can also reference a view by adding a view link to their note. The reader can automatically access that view.
Web Link	Allows authors to enter a URL in a note in HTML format. If a user clicks the URL, the Web page displays.
Publish	Allows authors to designate work as exemplary, thereby highlighting it for other authors.
Co-Author	Allows two or more authors to work together as authors of the same note.
Rise-Above	Allows authors to write an idea that will "rise above" the work that is contained in a collection of other notes. The notes in the rise-above note disappear from the view and become accessible only through the new rise-above note.
Annotate	Allows authors to respond to another author's note by adding a "sticky-type" note to it.
Build-On	Allows authors to expand and "build on" the notes of other authors.

5.2 REFERENCE

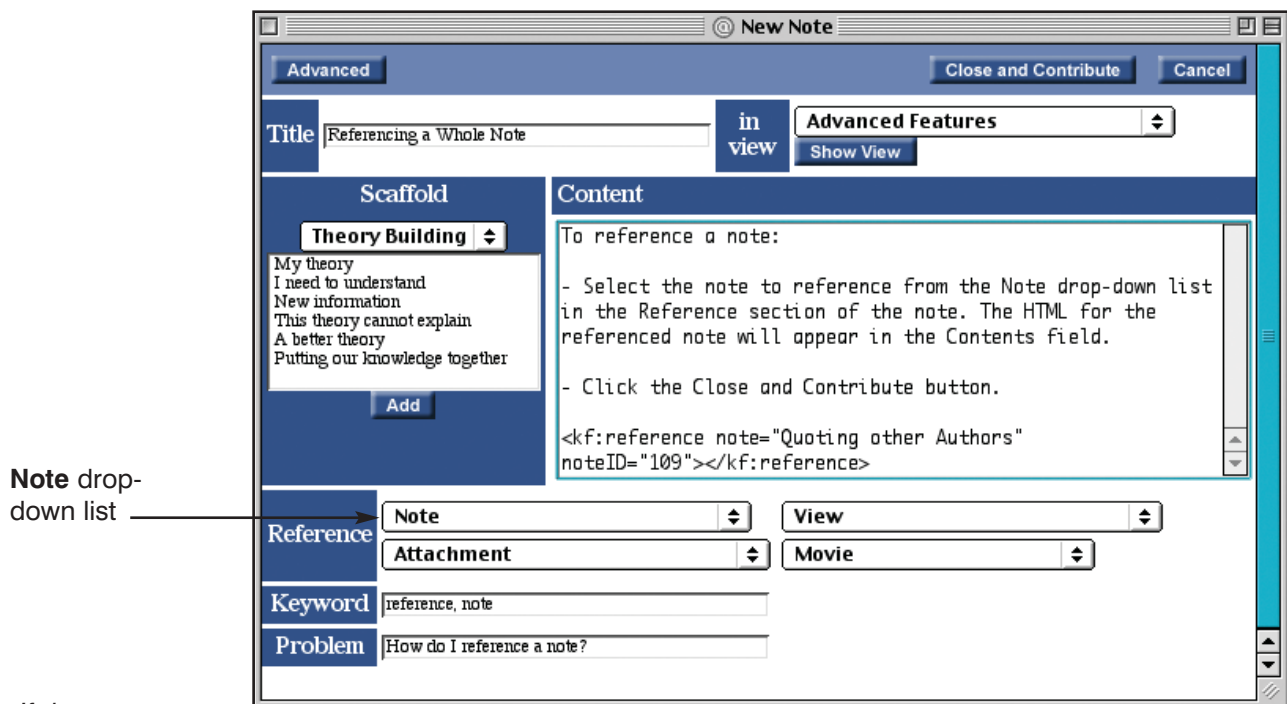
You can reference other notes, views, and Web pages in a note.

5.2.1 REFERENCING A NOTE

You can reference an entire note, quote from a section of a note, or create a new reference note.

REFERENCING A WHOLE NOTE

You can reference an entire note using the **Note** drop-down list in the **Reference** section of a note in write mode. The referenced note will be added to the **Content** field of your note. The **Note** drop-down list shows all the notes in the current view and notes you recently viewed.



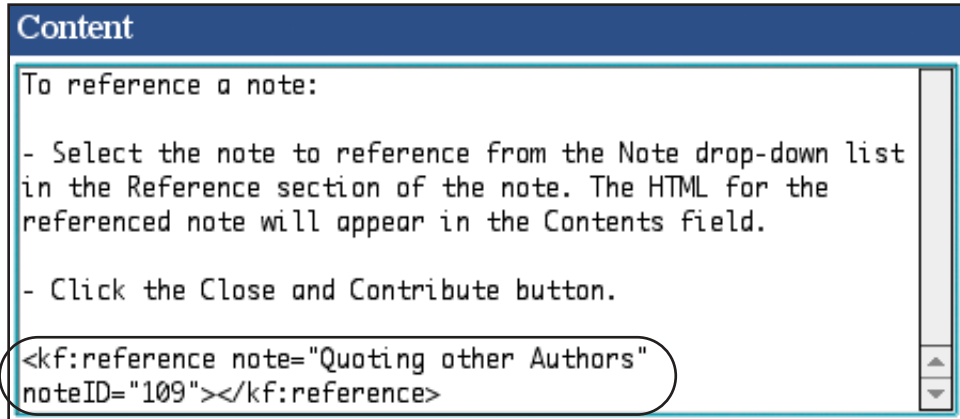
Note drop-down list

Note drop-down list in Reference section of note

Tip: If the note you want to reference is not listed under the current view or recently viewed notes listings in the **Note** drop-down list, change the view or open the note before referencing the note.

To reference a whole note:

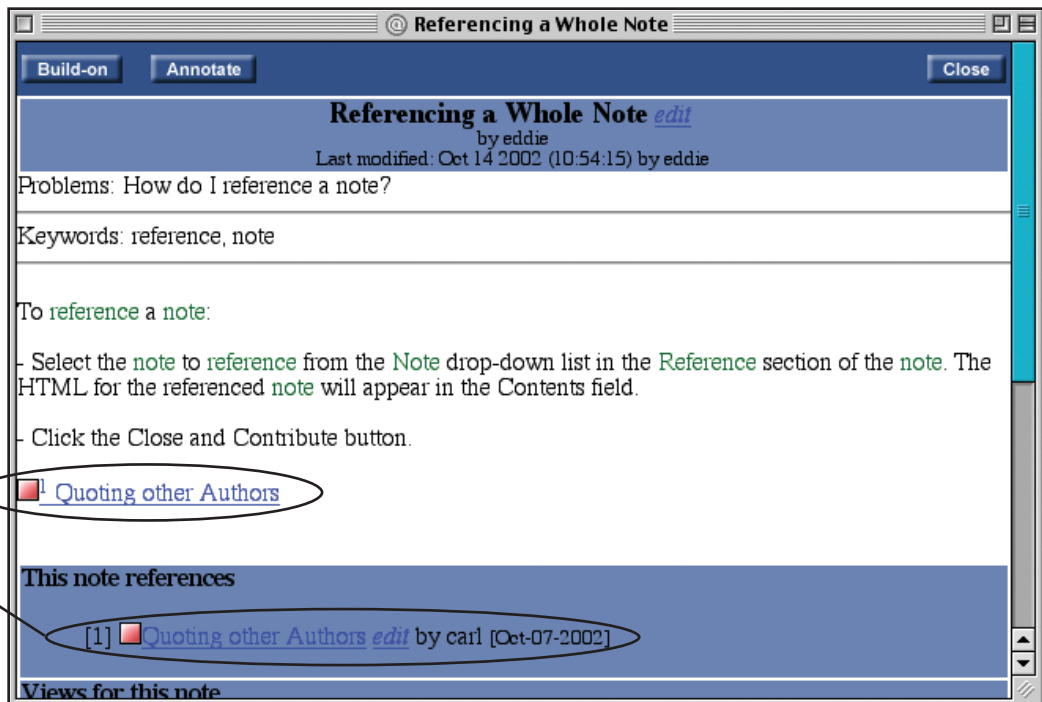
1. Select the note to reference from the **Note** drop-down list in the **Reference** section of the note. The HTML for the referenced note appears in the **Content** field.



HTML of referenced note

2. Click **Close and Contribute**.

The note appears in read mode with a note icon and title for the referenced note in the content area. Knowledge Forum also lists all referenced notes in the **This note references** section.



Referenced note

To open a referenced note:

- Click the note icon or title, or click the footnote link for the reference in the **This note references** area.

The referenced note opens in read mode.

Tip: When you plan to include a quote from another note, keep the referenced note's window open for easy access. You will need to copy text from the referenced note and paste it into the referencing note.

Tip: Use the Macintosh or Windows keyboard commands to copy and paste your material. To copy, use **COMMAND-C** (Macintosh) or **CTRL-C** (Windows). To paste, use **COMMAND-V** (Macintosh) or **CTRL-V** (Windows).

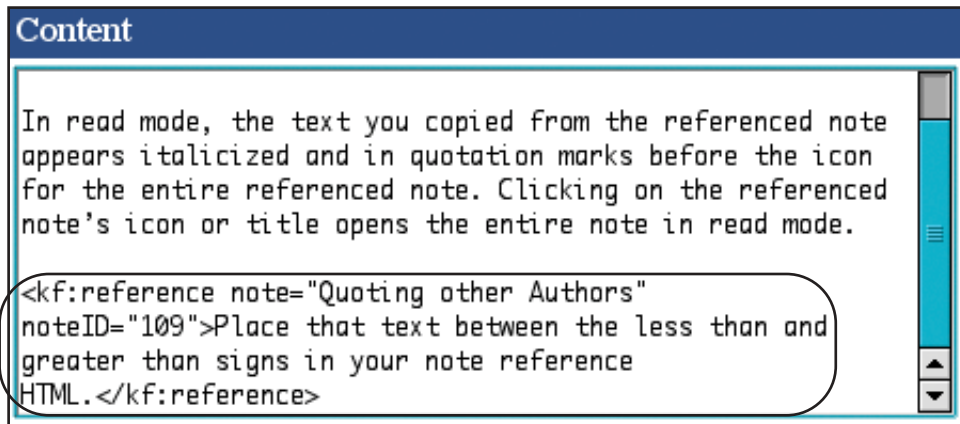
REFERENCING PART OF A NOTE

You can quote from a referenced note. This process is similar to the one for referencing a whole note, except that you will open the referenced note and copy part of it into the referencing note.

To reference part of a note:

1. Select the note to reference from the **Note** drop-down list in the **Reference** section of the note. The HTML for the referenced note appears in the **Content** field.
2. Open the referenced note.
3. Copy the text you want to reference.
4. Position cursor between the > < symbols in the **Content** field of the referencing note.
5. Paste the referenced words between the > < symbols.

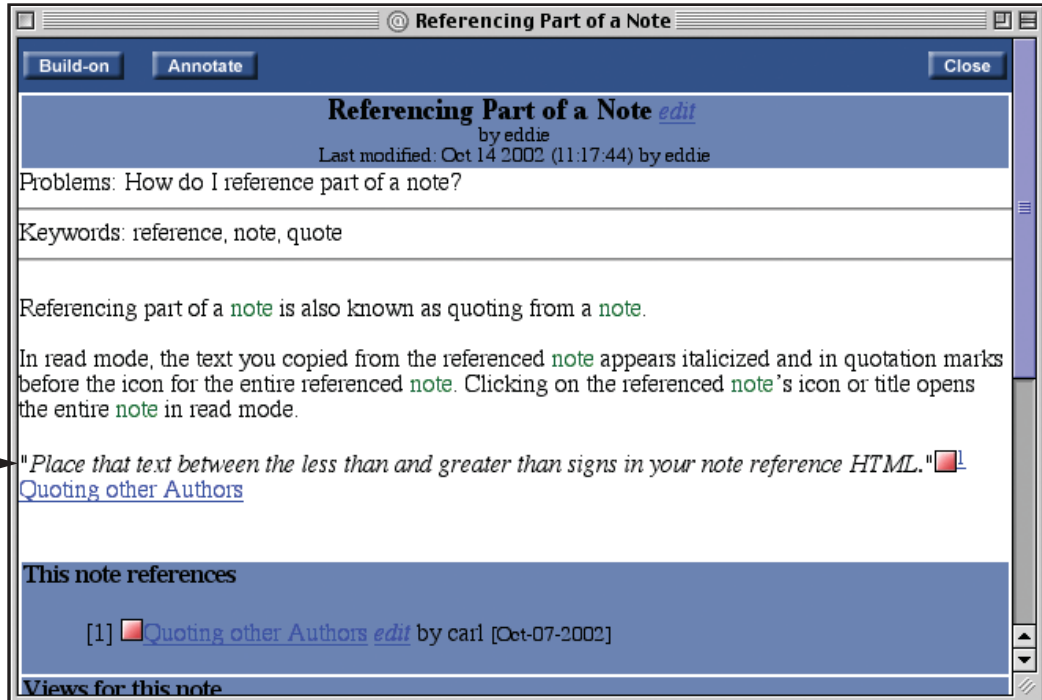
Quote HTML



HTML of quoted referenced note

6. Click **Close and Contribute**.

In read mode, the text you copied from the referenced note appears italicized and in quotation marks before the icon for the entire referenced note. Clicking on the referenced note's icon or title opens the entire note in read mode.



Quoted note

CREATING A NEW REFERENCE NOTE

You can create a new note that references another note by using the **Do Action** drop-down list. This is done from a view window.

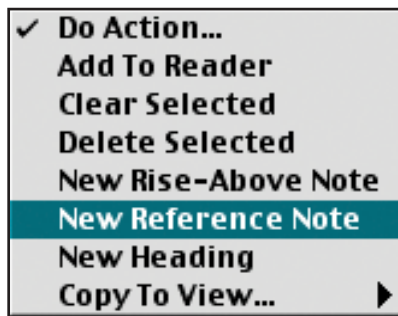
To create a new reference note:

1. Click the check box to the left of each note you want to reference.



Note selected

2. Select **New Reference Note** from the **Do Action** drop-down list.

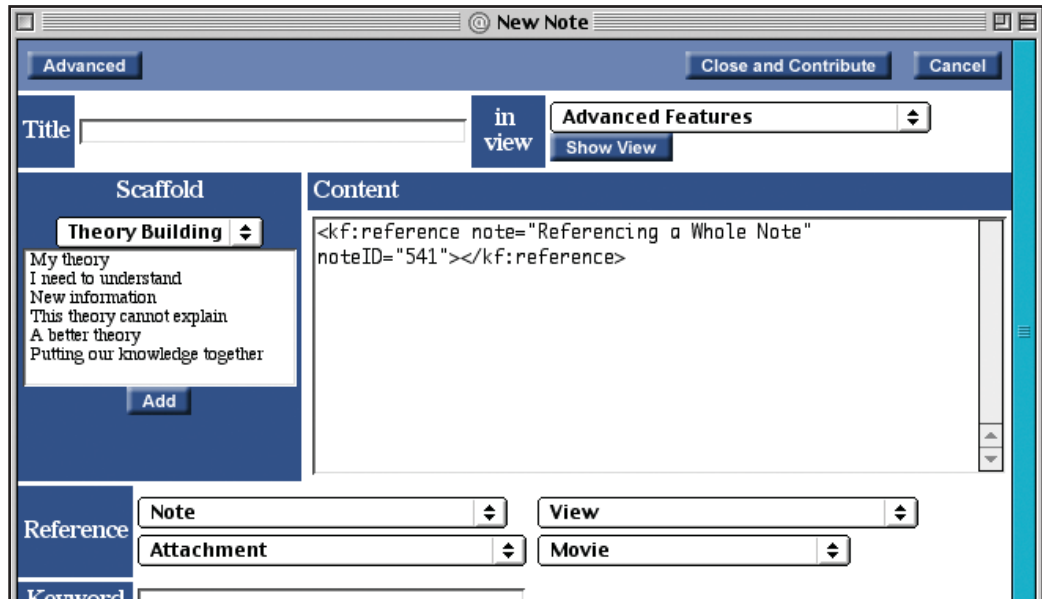


Selecting **New Reference Note** from the **Do Action** drop-down list

5 CONNECTIONS

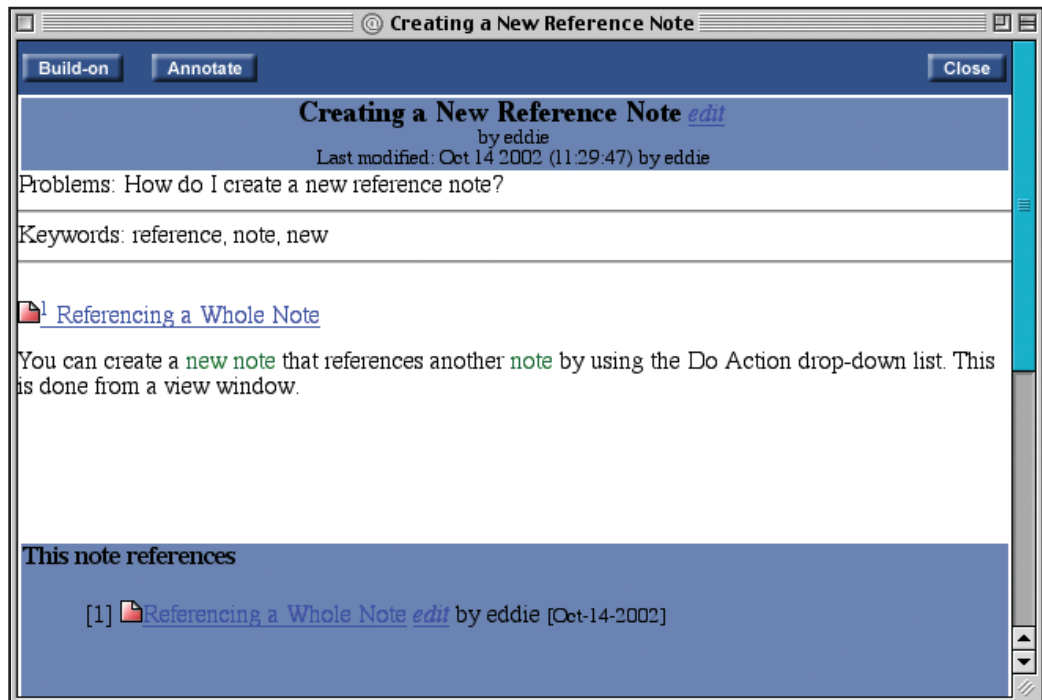
Note: See section 4.3 to learn more about creating a note.

3. A new note is created with the selected notes inserted as a reference in the **Content** field. Complete the creation of the new note.



New note with HTML of referenced note

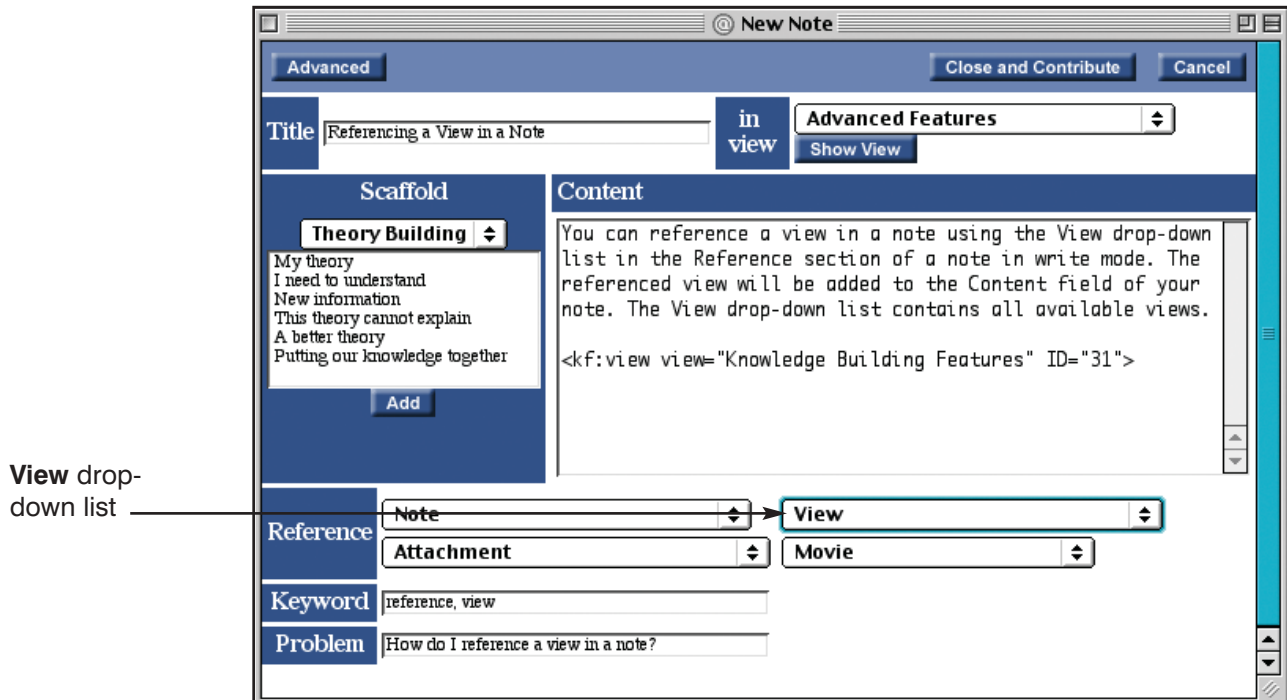
4. Click **Close and Contribute**.



New note with referenced note

5.2.2 REFERENCING A VIEW

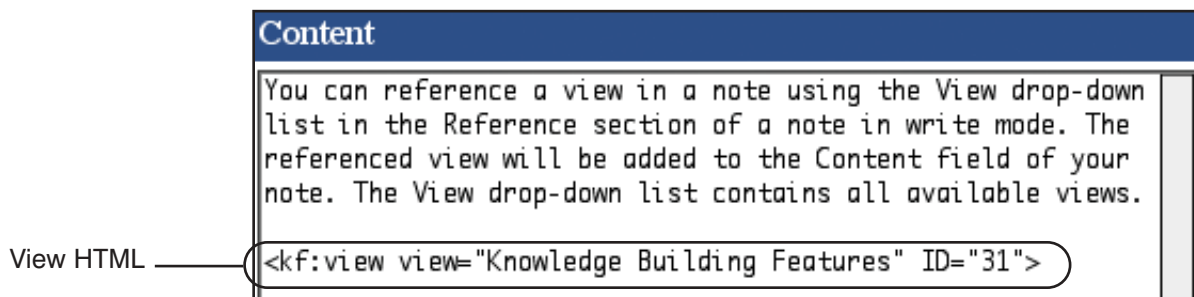
You can reference a view in a note using the **View** drop-down list in the **Reference** section of a note in write mode. The referenced view will be added to the **Content** field of your note. The **View** drop-down list contains all available views.



*View drop-down list in **Reference** section of note*

To reference a view in a note:

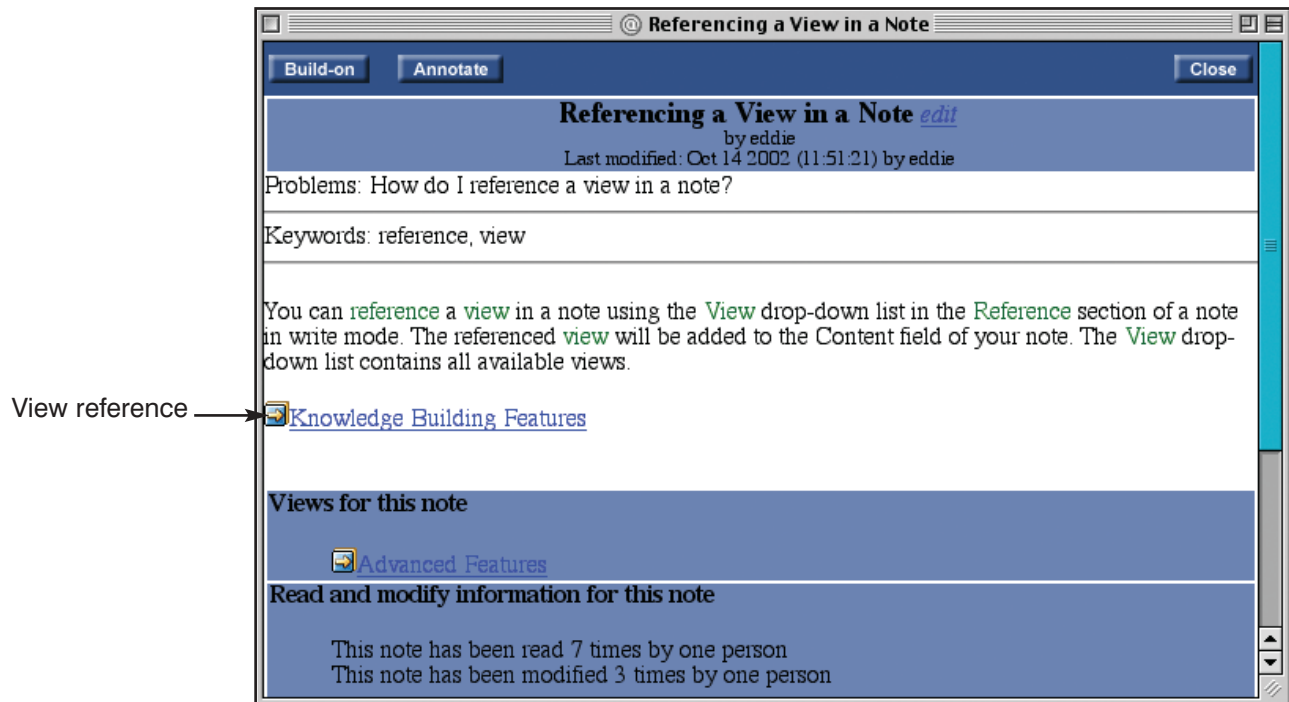
1. Select the view to reference from the **View** drop-down list in the **Reference** section of the note. The HTML for the referenced view appears in the **Content** field.



HTML of referenced view

2. Click **Close and Contribute**.

The note appears in read mode with a view link for the referenced view in the content area.



Referenced view

To access a referenced view in a note:

- Click the view link.

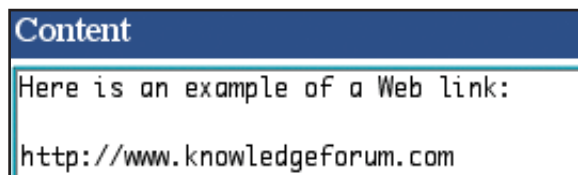
The referenced view appears in the view window.

5.2.3 REFERENCING A WEB PAGE

You can reference Web pages by placing a Web link in a note. To do so, the note must be opened in write mode.

To reference a Web page:

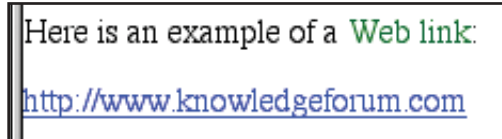
1. Type the Web link in `http://` format in the **Content** field.



Example of Web link

2. Click **Close and Contribute**.

The note appears in read mode with the Web link in the content area.



Web link in note

To use a Web link in a note:

- Click the Web link.

The linked Web page appears.

5.2.4 REMOVING A REFERENCE

You can remove references to other notes, views, and Web pages in a note. To do so, the note must be in write mode.

Tip: Be sure to select the entire HTML statement of the reference you want to delete.

To remove a note or view reference:

1. Delete the reference HTML statement from the **Content** field.
2. Click **Close and Contribute**.

To remove a Web page reference:

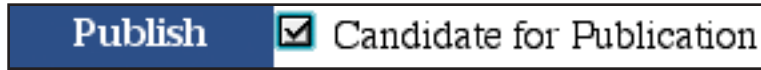
1. Delete the Web page reference from the **Content** field.
2. Click **Close and Contribute**.

5.3 PUBLISHING A NOTE

Notes of particularly high quality are often published, highlighting them for other users. If you are an author, you can make your note a candidate for publication. This is done in the **Publish** section of a note in advanced write mode.


To make a note a candidate for publishing:

1. Click **Advanced** if not in advanced mode.
2. Click the **Candidate for Publication** check box.



Candidate for Publication check box

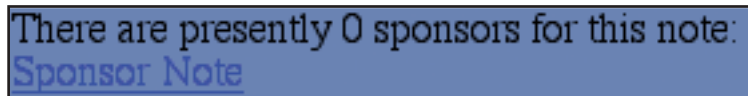
3. Click .

The note icon changes to .

When other users open the note in read mode, they see a [Sponsor Note](#) link. For a nominated note to become published, three other authors must sponsor the note.

To sponsor a note:

- Click the [Sponsor Note](#) link.

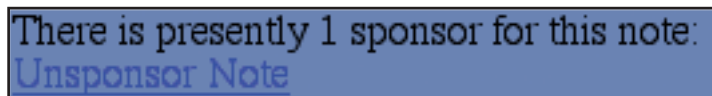


Sponsor Note link

You can unsponsor a note you have sponsored.

To unsponsor a note:


- Click the [Unsponsor Note](#) link.

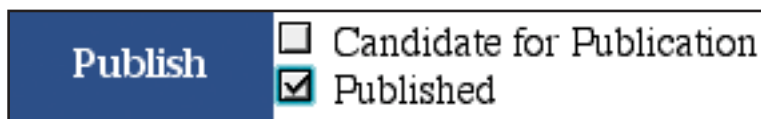


Unsponsor Note link

Editors and managers can publish a note immediately, without the sponsorship of other authors. Editors and managers have an additional option in the **Publish** section of a note in advanced write mode that lets them publish directly.

To publish a note:

1. Click  if not in advanced mode.
2. Click the **Published** check box.



Published check box

3. Click **Close and Contribute**.

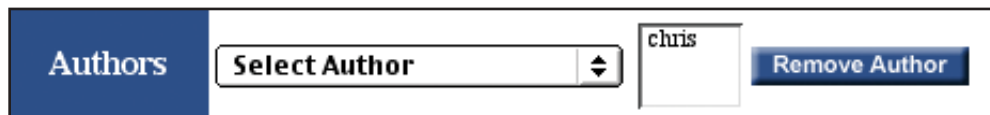
A published note's icon changes to .

5.4 CO-AUTHORING A NOTE

Note: All editors and managers are considered to be authors.

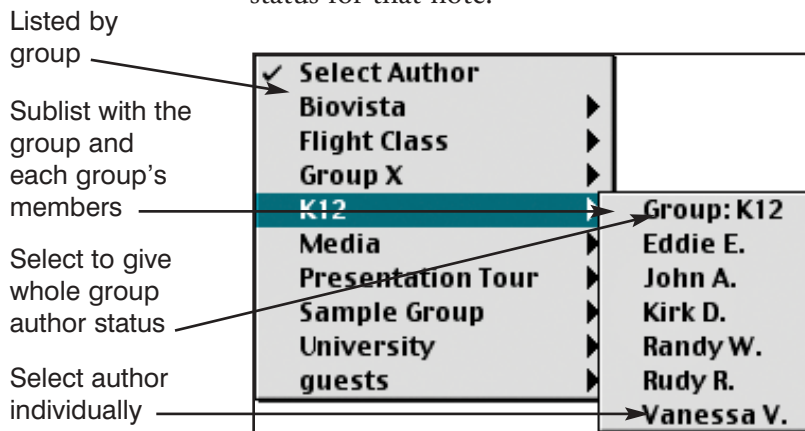
Note: See section 4.3.2 to learn more about notes in advanced write mode.

Co-authoring allows users to contribute to the same note. A note's author can grant other users or groups author status for a note. You can add or remove authors from the **Authors** section of a note in advanced write mode.



Authors section

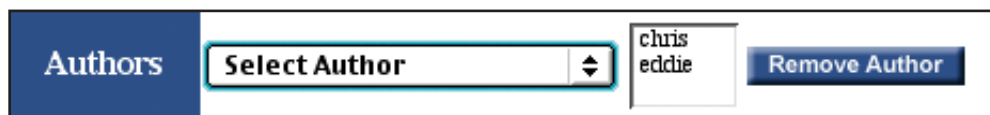
Authors are organized by group in the **Select Author** drop-down list. If the group name is selected as the author, then every member of that group will gain author status for that note.



Select Author drop-down list

To add an author:

1. Click **Advanced** if not in advanced mode.
2. Select an author or group from the **Select Author** drop-down list. The new author or group appears in the **Authors** list.



Author added

3. Click **Close and Contribute**.

To remove an author from the **Authors** list:

1. Click **Advanced** if not in advanced mode.
2. Select an author from the **Authors** list.
3. Click **Remove Author**.
4. Click **Close and Contribute**.

5.5 RISE-ABOVE NOTE

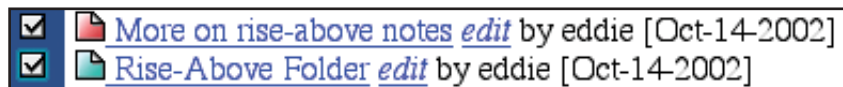
A rise-above note allows you to rise above or file earlier work in order to make a new theory and idea more visible. Notes placed in a rise-above note are removed from the view and are only accessible through the rise-above note.

5.5.1 CREATING A RISE-ABOVE NOTE

You can create a rise-above note by using the **Do Action** drop-down list. This is done from a view window.

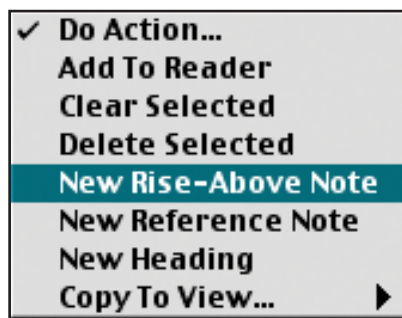
To create a rise-above note:

1. Click the check box to the left of each note you want to include in the rise-above note.



Notes selected

2. Select **New Rise-Above Note** from the **Do Action** drop-down list.

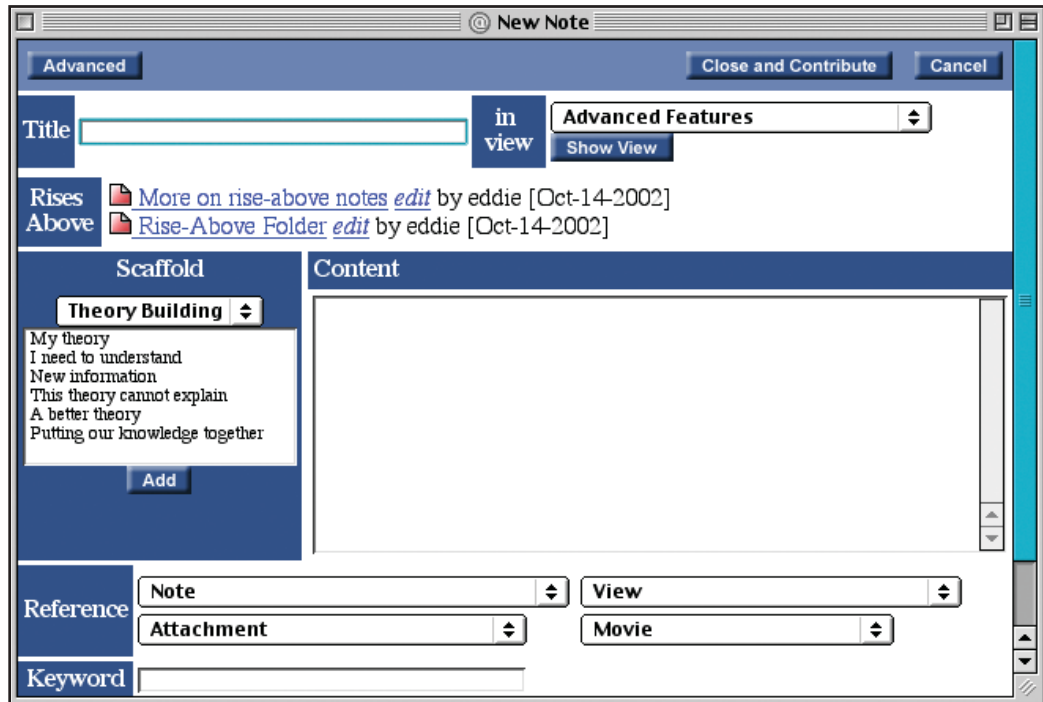


*New Rise-Above Note selected from the **Do Action** drop-down list*

5 CONNECTIONS

Note: See section 4.3 to learn more about creating a note.

3. A new rise-above note is created containing the selected notes. Complete the creation of the new rise-above note.

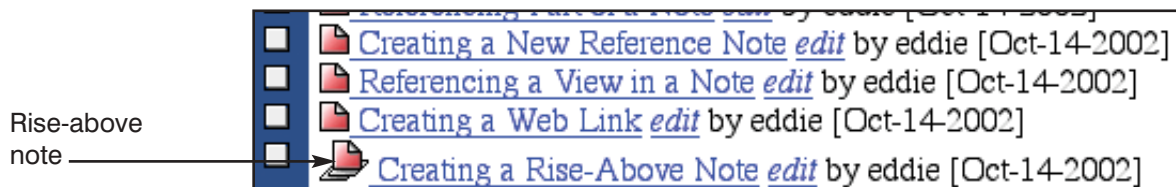


New rise-above note in write mode

4. Click **Close and Contribute**.

A rise-above note contains a **Rises Above** section, which lists all of the notes included in the rise-above note. These notes no longer appear in the view.

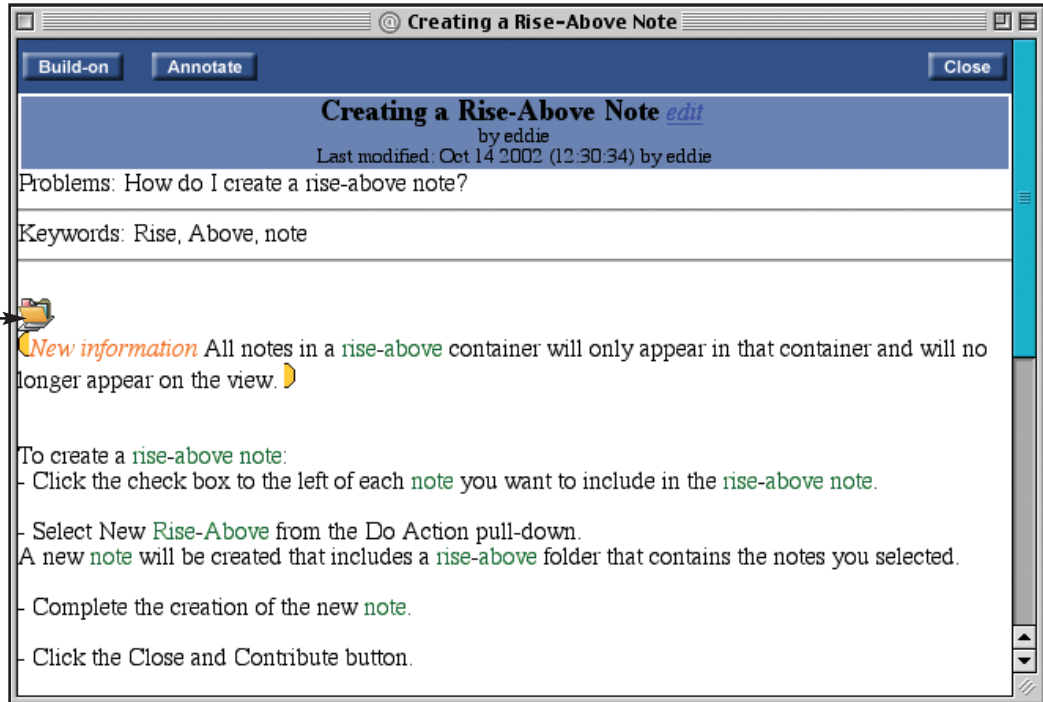
After you close and contribute the rise-above note, it will be listed on the view as a **Rise-Above** icon.



Rise-above note listed on a view

When you open a rise-above note in read mode, it will contain a rise-above folder.

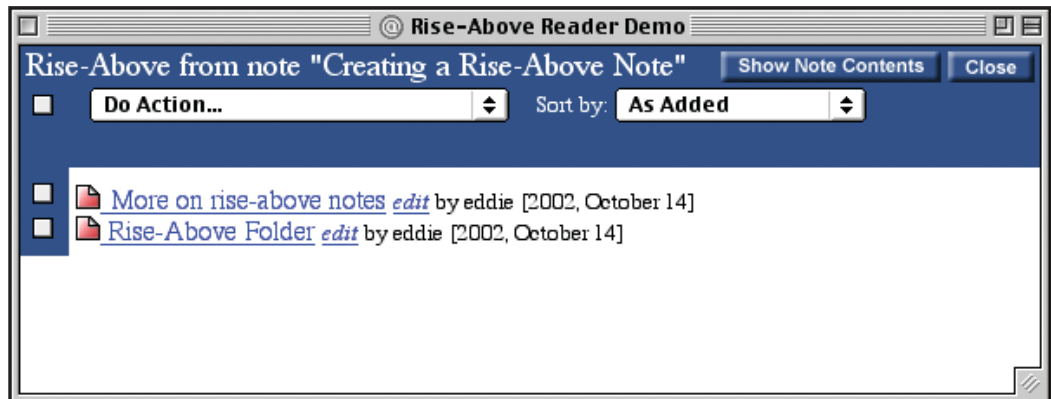
Rise-above folder



Rise-above note in read mode



If you click the rise-above folder you will find the notes moved into the rise-above note listed in the Rise-Above Reader window.

Note: See section 5.5.3 to learn more about the Rise-Above Reader.



Rise-Above Reader

To view the Rise-Above Reader:

1. Click  to open the rise-above note in read mode.
2. Click . The Rise-Above Reader window appears.

Tip: Clicking the rise-above folder in a note in read or write mode will open the Rise-Above Reader.

5.5.2 EDITING A RISE-ABOVE NOTE

In most respects, you edit a rise-above note just like any other note. In write mode, the rise-above note looks like an ordinary note with the addition of the **Rises Above** section. The **Rises Above** section lists the notes included in the rise-above note and contains an **Add To Rise-Above** drop-down list which allows you to add more notes to the rise-above note.

To edit a rise-above note (from the view window or from the note in read mode):

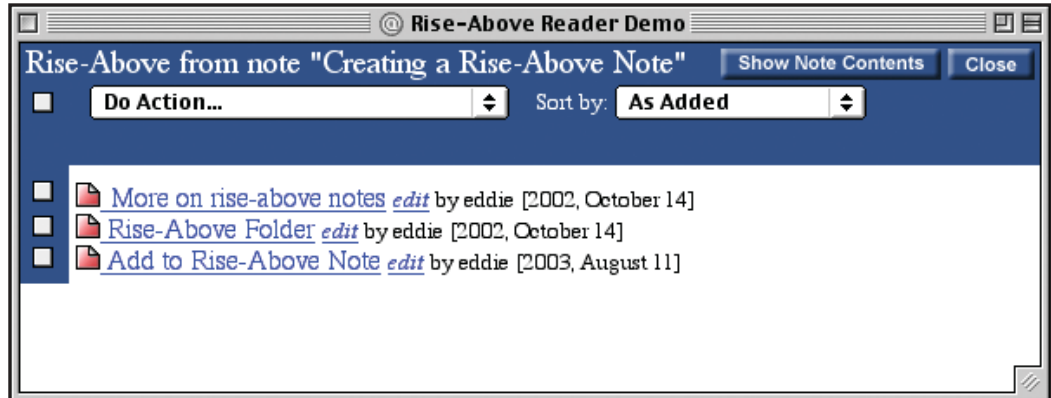
1. Click the *edit* link next to the rise-above note's title. The rise-above note opens in write mode.

Rise-above note in write mode

2. Select a note to add to the rise-above note from either the current view or the most recently viewed list of notes from the **Add To Rise-Above** drop-down list, if applicable.
3. Edit the basic and advanced fields as needed.
4. Click **Close and Contribute**.

Note: See section 4.4 to learn more about editing notes.

The edited rise-above note appears in read mode and is added to the view.



Rise-Above Reader

5.5.3 WORKING IN THE RISE-ABOVE READER

From the Rise-Above Reader you can open a note in read mode, clear a note from the reader, add a note to the rise-above note, sort the listed notes, and show or hide the contents of the notes.

To close the Rise-Above Reader:

- Click .

OPEN NOTES

You can open a note in read mode from the Rise-Above Reader.

To open a note in read mode from the Rise-Above Reader:

- Click the note link. The note opens in read mode.

Note: All editors and managers are considered to be authors.

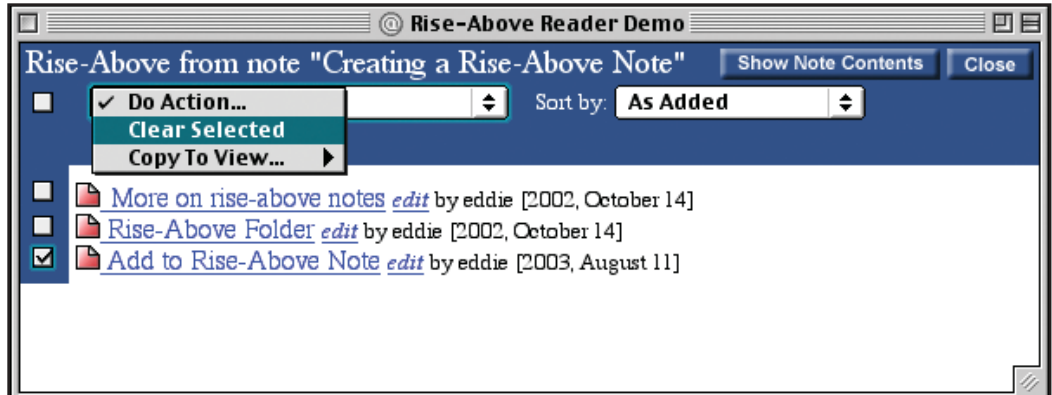
Tip: To select all notes in the Rise-Above Reader, click the check box to the left of the **Do Action** drop-down list. To clear the selection of a note in the view, click the checked check box to the left of the note.

CLEAR NOTES

Clearing a note from the Rise-Above Reader removes it from the rise-above note. The note authors can clear notes from the Rise-Above Reader.

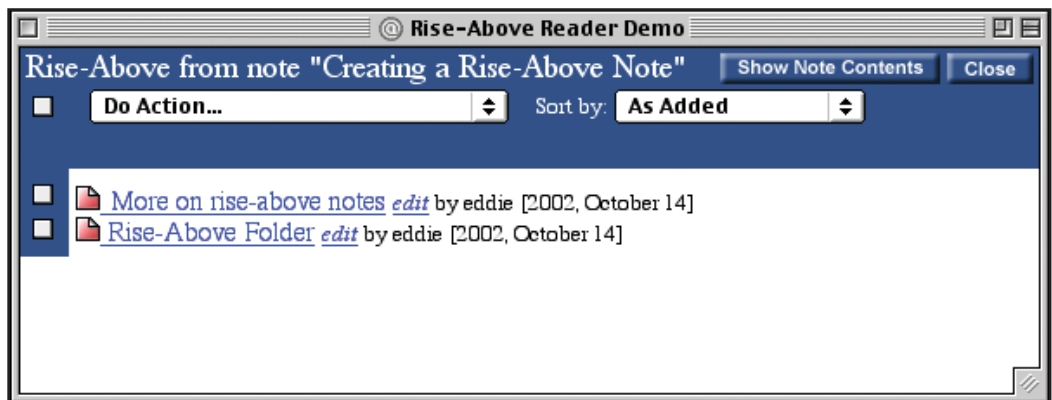
To clear notes from the Rise-Above Reader:

1. Click the check box to the left of each note you want to clear.
2. Select **Clear Selected** from the **Do Action** drop-down list.



Clearing selected note

The note is cleared from the Rise-Above Reader.

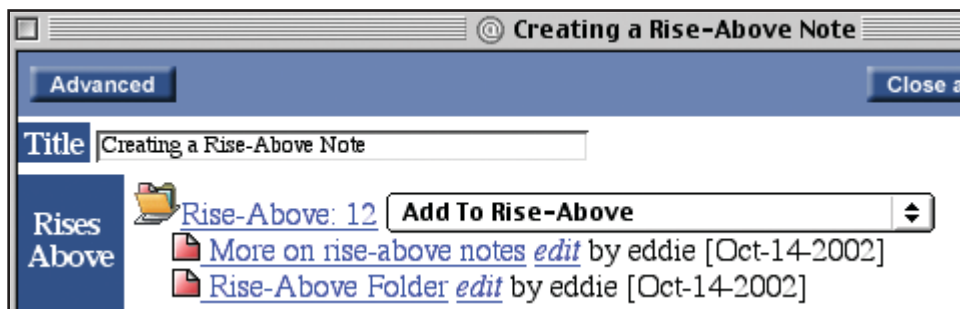


Note cleared from the Rise-Above Reader

ADD NOTES

Note: All editors and managers are considered to be authors.

A rise-above note in write mode contains an **Add To Rise-Above** drop-down list that allows you to add more notes to the rise-above note. Rise-above note authors can add notes to the rise-above note.



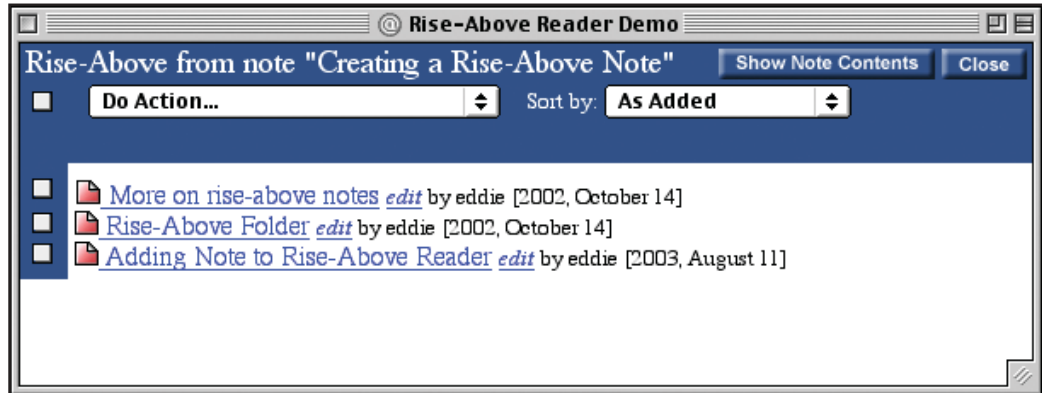
Add To Rise-Above drop-down list in write mode

5 CONNECTIONS

To add a note to a rise-above note from the rise-above note in write mode:

- Select a note to add from the **Add To Rise-Above** drop-down list.

The note is added to the Rise-Above Reader.



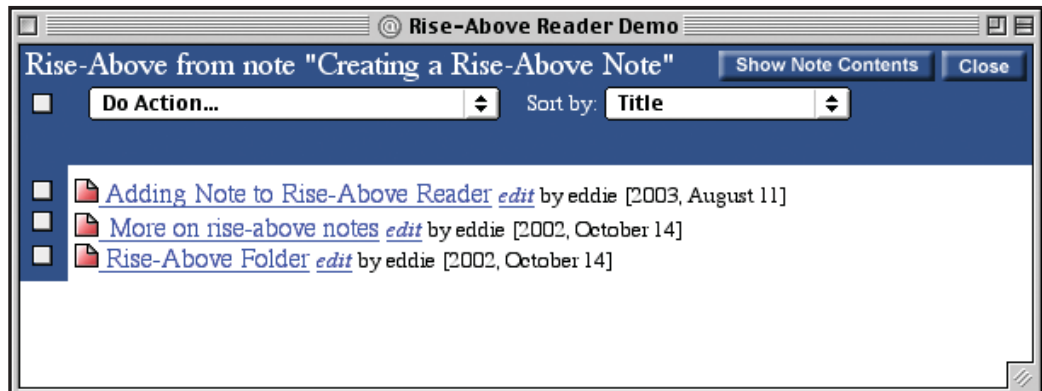
Note added to the Rise-Above Reader

SORT NOTES

You can sort the notes in the Rise-Above Reader by title, author, whether read or unread, creation date, and modification date.

To sort the listed notes in the Rise-Above Reader:

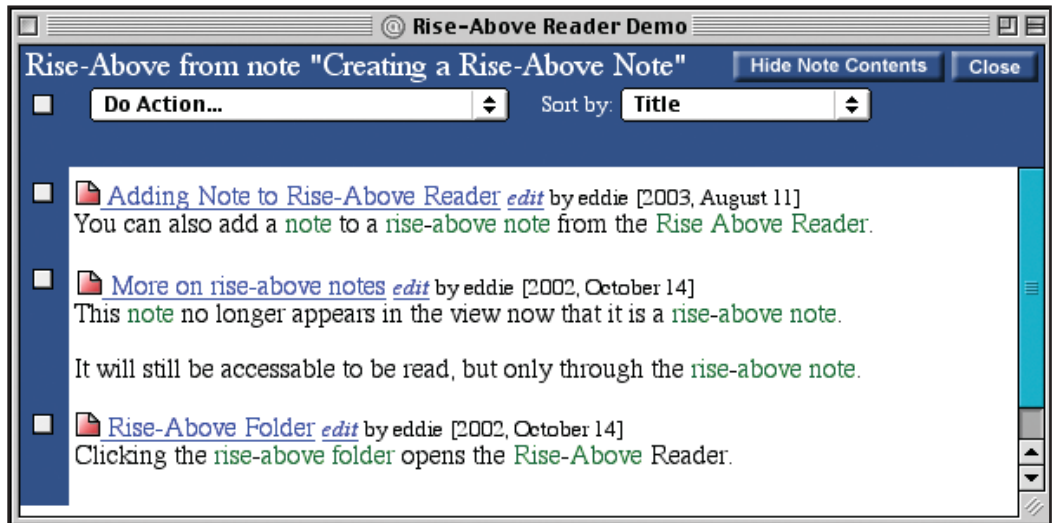
- Select the sorting method from the **Sort by** drop-down list.



Notes sorted by title

SHOW OR HIDE NOTE CONTENT

You can display or hide the contents for the notes listed in the Rise-Above Reader.



Showing contents

To show or hide the note contents in the Rise-Above Reader:

- Click **Show Note Contents** or **Hide Note Contents**.

5.6 ANNOTATE

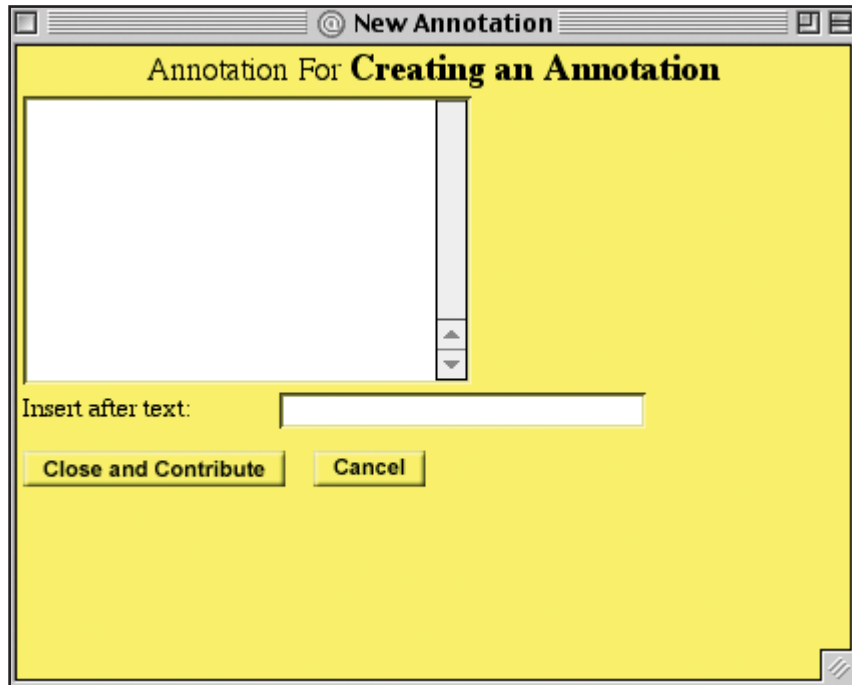
All users, with the exception of readers, can add annotations to any note. This is a quick way for users to provide feedback regarding a note. An annotation is not intended to build on to the main idea of the note, but rather to comment on some aspect of the note (such as expressing an opinion or pointing out a spelling error) similar to a sticky-type note.

5.6.1 CREATING AN ANNOTATION

You can create an annotation from an existing note in read mode.

To create an annotation:

1. Open a note in read mode.
2. Click **Annotate**. The New Annotation window appears.




Tip: You can cancel your annotation by clicking the **Cancel** button or closing the New Annotation window.

New Annotation window

3. Type an annotation in the **Annotation** field.
4. Type the text from the note's **Content** field that you want the annotation to follow in the **Insert after text** field.
5. Click **Close and Contribute**.

The annotation is added to the **Content** field of the note at the insertion point specified in the New Annotation window. The **Annotation** icon is followed by the name of the author who created the annotation.

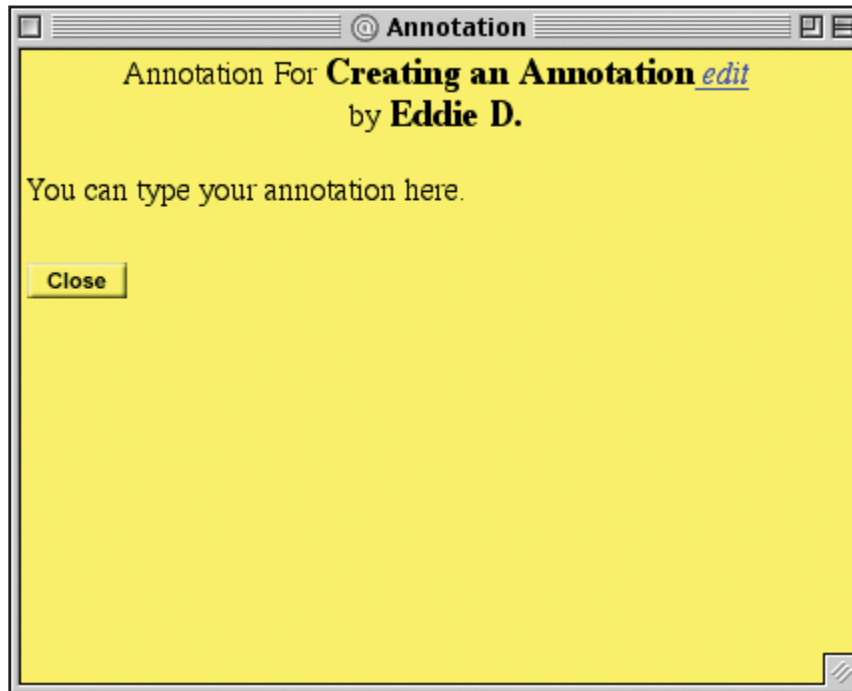
Your annotation will appear in  **Eddie D.** the note.

Annotation added to note

You can view an annotation in read mode.

To view an annotation:

- Click . The annotation opens in read mode.



Annotation in read mode


To close the Annotation window:

- Click .

5.6.2 EDITING AN ANNOTATION

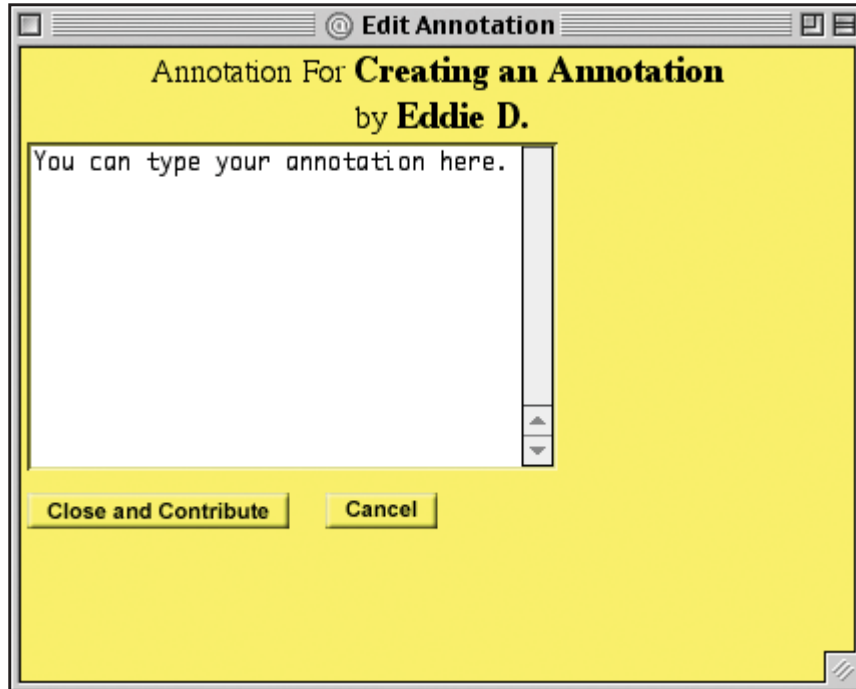
You can edit any annotation you have authorship privileges to. Authors of an annotation will see an edit link next to the annotation's title when they open the annotation in read mode.

To edit an annotation:

1. Click . The annotation opens in read mode.
2. Click the edit link next to the Annotation title. The annotation changes to write mode.

Tip: You cannot change the position of the annotation from the Edit Annotation window. You can change the position by moving the annotation's HTML code in the note's **Content** field.

Tip: You can cancel your edit by clicking the **Cancel** button or closing the Edit Annotation window.



Annotation in write mode

3. Edit the annotation in the **Annotation** field.
4. Click **Close and Contribute**.

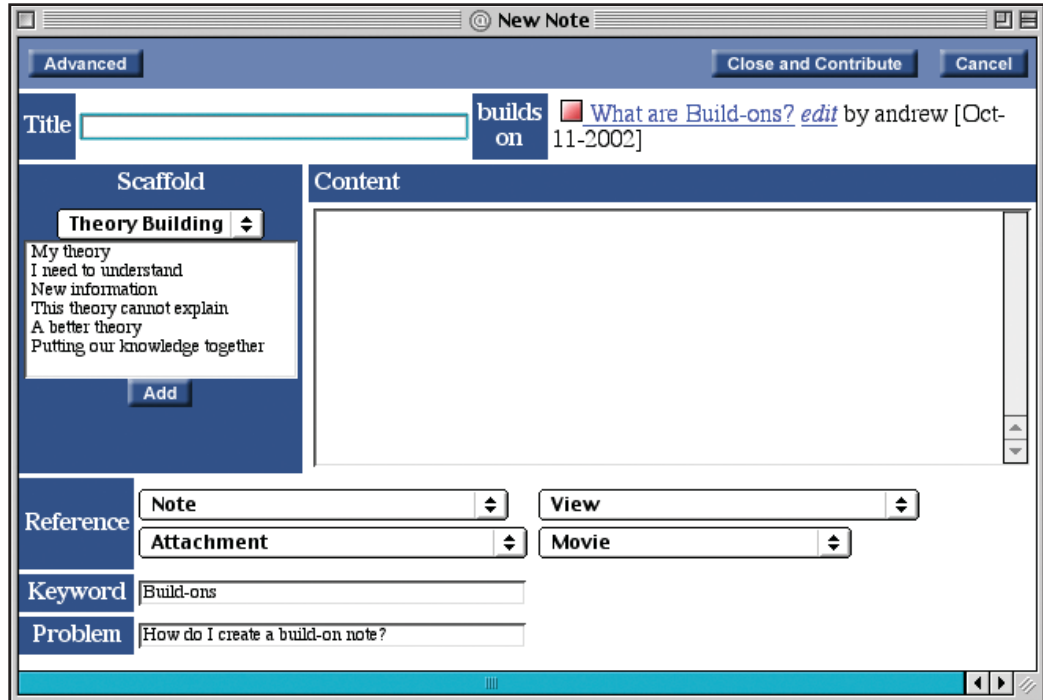
5.7 CREATING A BUILD-ON NOTE

Another type of connection is the build-on note. Authors typically build on to a note when they want to share a related idea or react in a way that will add value to the original note. A build-on note is a stand-alone note, but it is connected to the note that inspired it. Since build-on notes are separate notes themselves, they can be the subject of other build-on notes, leading to a complex, tree-like structure.

A build-on note inherits the problem and keywords of the parent note. You can specify scaffolds, enter content, add keywords, change the problem, and make any other changes just like you would for a normal note.

To create a build-on note:

1. Open the note you want to build on in read mode.
2. Click **Build-on**. A New Note window appears.



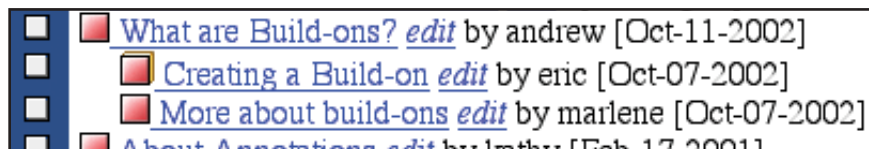
Build-on note

Note: See section 4.3 to learn more about creating a note.

3. Complete the creation of the build-on note.
4. Click **Close and Contribute**.

Note: See section 3.5.6 to learn more about displaying objects in a view.

The build-on note appears on the view window under the parent note when objects are organized by discussion.



Build-on note in view

In write mode, a build-on note contains a **builds on** section which lists the parent note. The parent note can be accessed from there. In read mode, the build-on note contains a link to the parent note in the **This note builds onto** section.



This note builds onto section of build-on note in read mode

5 CONNECTIONS

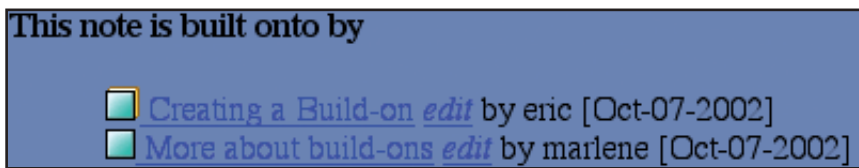
To access the parent note from a build-on note in write mode:

- Click the parent note's icon or title in the **builds on** section of the build-on note.

To access the parent note from a build-on note in read mode:

- Click the parent note's icon or title in the **This note builds onto** section of the build-on note.

You can also access build-on notes from the parent note. In read mode, the parent note lists links to its build-on notes in the **This note is built onto by** section.



This note is built onto by section of parent note in read mode

To access a build-on note from the parent note in read mode:

- Click the build-on note's icon or title in the **This note is built onto by** section of the parent note.



6 VIEW LINKS

6.1 INTRODUCTION TO VIEW LINKS

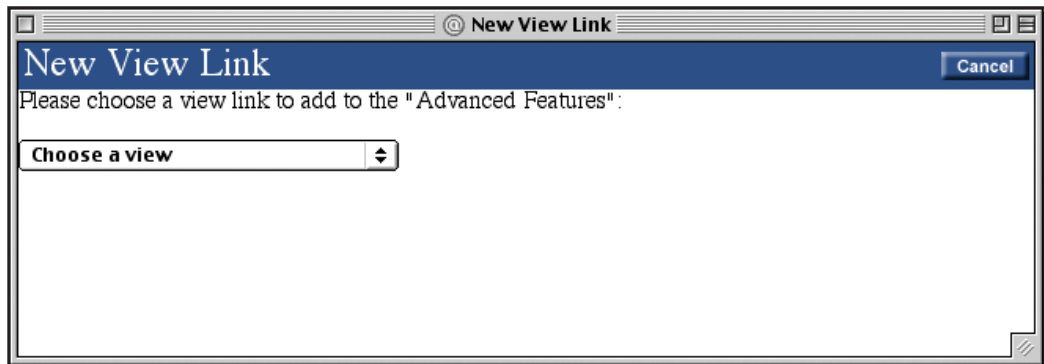
A view link allows you to connect views that you think a user might want to go to and review. View links can help a user identify a set of related content that they may want to focus on next. You can create a view link in a view or a note.

6.2 CREATING A VIEW LINK IN A VIEW

You can create a view link in a view from the New View Link window.

To create a view link in a view:

1. Click . The New View Link window opens.



New View Link window

2. Select the view to link to from the **Choose a view** drop-down list.

Knowledge Forum adds the new view link to the bottom of the current view.



Added view link

Note: A red border surrounding a view icon indicates that the view contains notes that you have not read, or notes that have been modified since you last read them.

To access a new view using a view link:

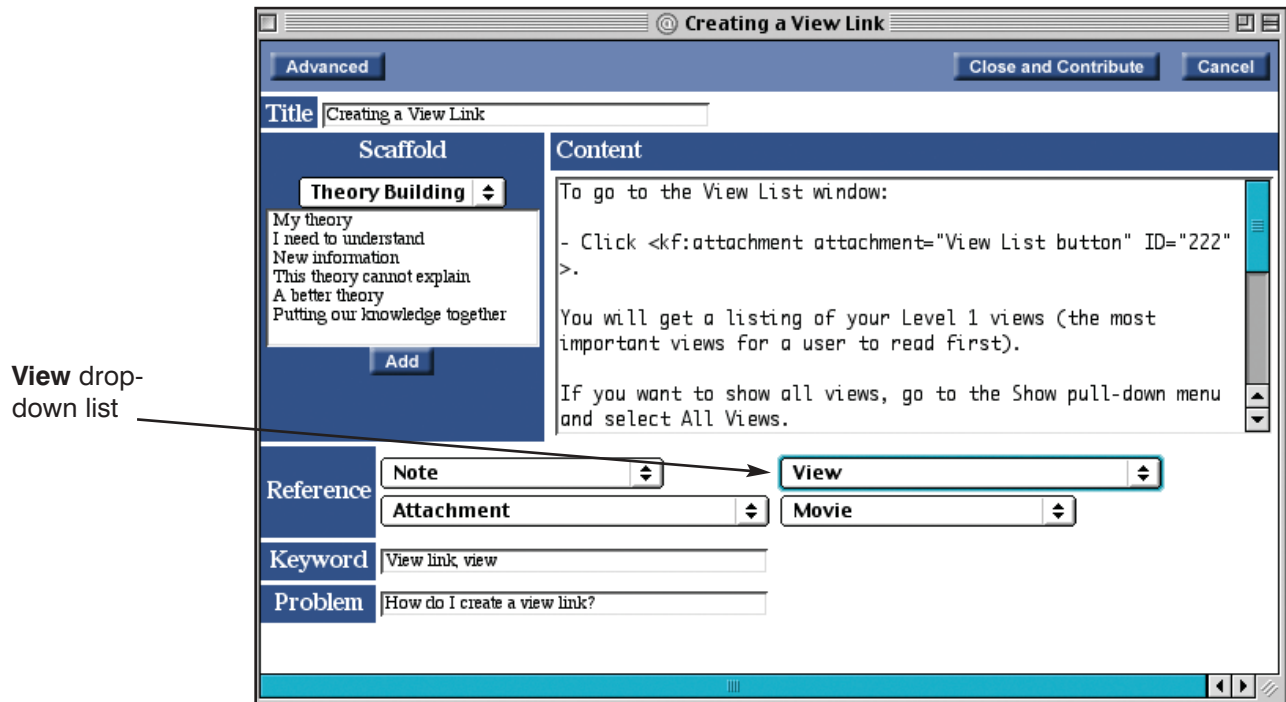
- Click the view link.

The new view appears in the view window.

Note: Creating a view link in a note is also known as referencing a view. See section 5.2.2.

6.3 CREATING A VIEW LINK IN A NOTE

You can create a view link in a note using the **View** drop-down list in the **Reference** section of a note in write mode. The referenced view will be added to the **Content** field of your note. The **View** drop-down list shows all available views.

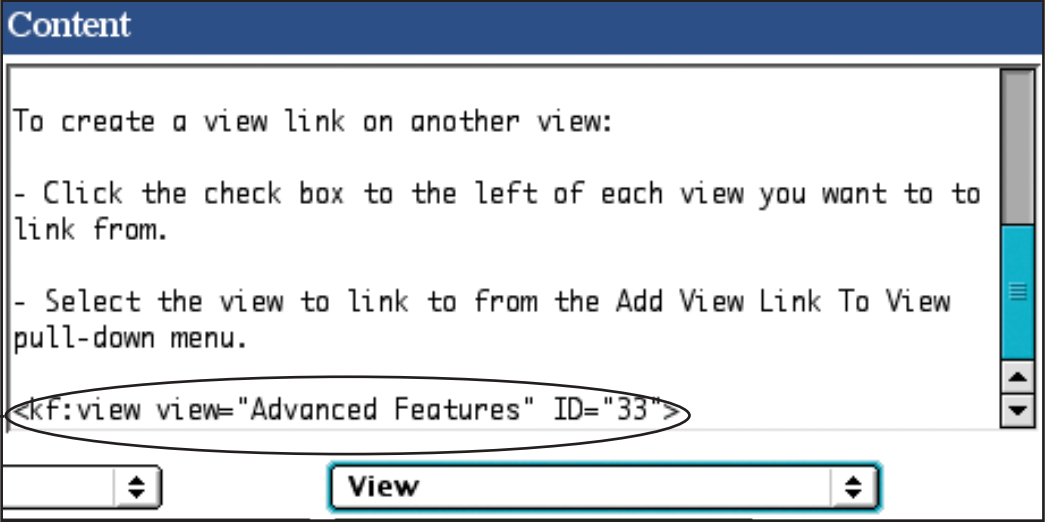


View drop-down list in Reference section of note

To reference a view in a note:

1. Select the view to reference from the **View** drop-down list in the **Reference** section of the note. The HTML for the referenced view appears in the **Content** field.

6 VIEW LINKS



The screenshot shows a content editor window titled "Content". The main text area contains instructions on how to create a view link. Below the instructions, a line of HTML code is shown: `<kf:view view="Advanced Features" ID="33">`. A label "View link HTML" points to this code. Below the code is a pull-down menu with the word "View" selected. Below the menu is the text "HTML of referenced view".

To create a view link on another view:

- Click the check box to the left of each view you want to link from.
- Select the view to link to from the Add View Link To View pull-down menu.

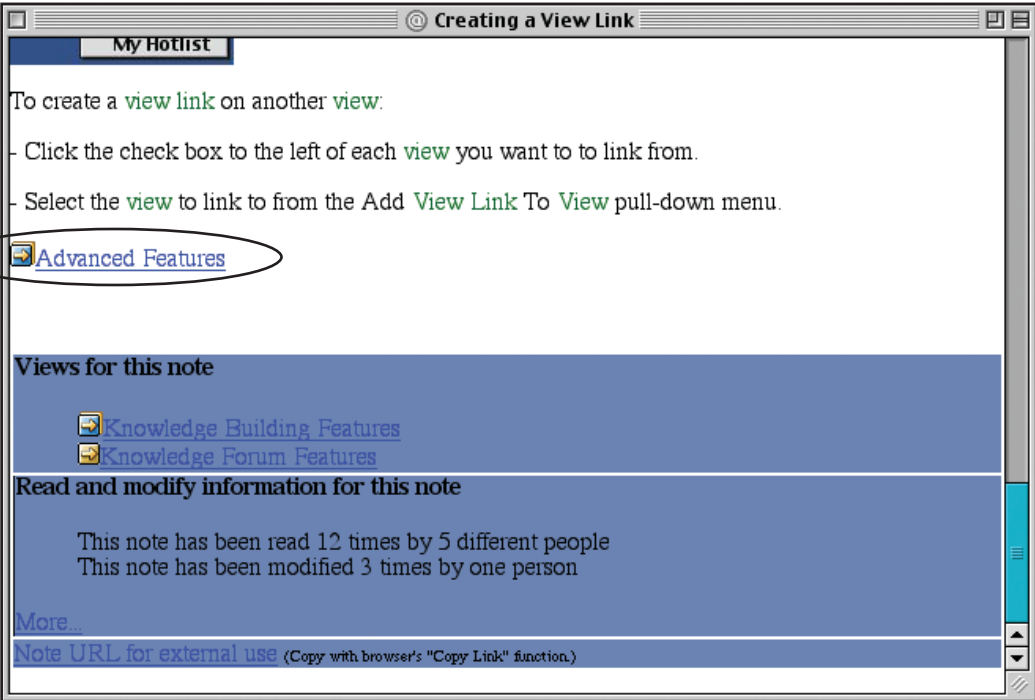
View link HTML `<kf:view view="Advanced Features" ID="33">`

View

HTML of referenced view

2. Click **Close and Contribute**.

The note appears in read mode with a view link for the referenced view in the content area.



The screenshot shows a browser window titled "Creating a View Link". The browser's address bar shows "My Hotlist". The main content area displays the same instructions as the previous screenshot. A label "View link" points to a blue link with a folder icon and the text "Advanced Features". Below the instructions, there is a section titled "Views for this note" with two links: "Knowledge Building Features" and "Knowledge Forum Features". Below that is a section titled "Read and modify information for this note" with the text: "This note has been read 12 times by 5 different people" and "This note has been modified 3 times by one person". At the bottom, there is a "More.." link and a "Note URL for external use" link with a small note: "(Copy with browser's 'Copy Link' function.)".

View link [Advanced Features](#)

Views for this note

- [Knowledge Building Features](#)
- [Knowledge Forum Features](#)

Read and modify information for this note

This note has been read 12 times by 5 different people
This note has been modified 3 times by one person

[More..](#)

[Note URL for external use](#) (Copy with browser's "Copy Link" function.)

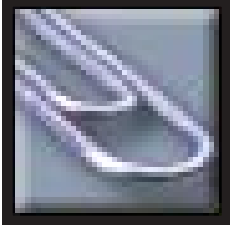
Referenced view

6 VIEW LINKS

To access a referenced view in a note:

- Click the view link in the content area.

The referenced view appears in the view window.



7 ATTACHMENTS

7.1 INTRODUCTION TO ATTACHMENTS

An attachment in Knowledge Forum is a document created in a separate application. You can add attachments to the knowledge base for other users to review. However, users can only open and read an attachment if they have the application the attachment was created in on their computer. (For example, users would need to have PowerPoint on their computer to open a PowerPoint attachment.)

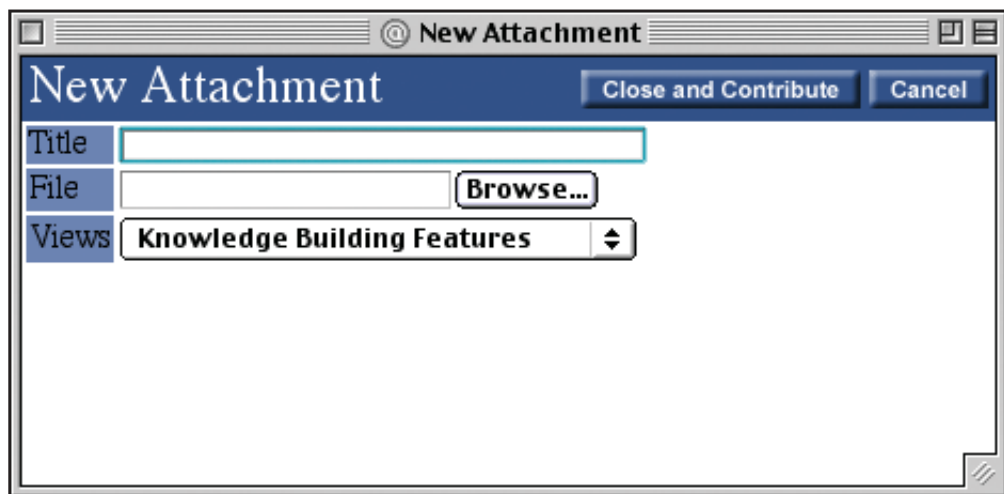
Attachments can be referenced and discussed just as any other Knowledge Forum object. You can add an attachment to a view or reference it in a note.

7.2 ADDING AN ATTACHMENT TO A VIEW



You can add an attachment to a view.

To add an attachment to a view:

1. Click . The New Attachment window appears.



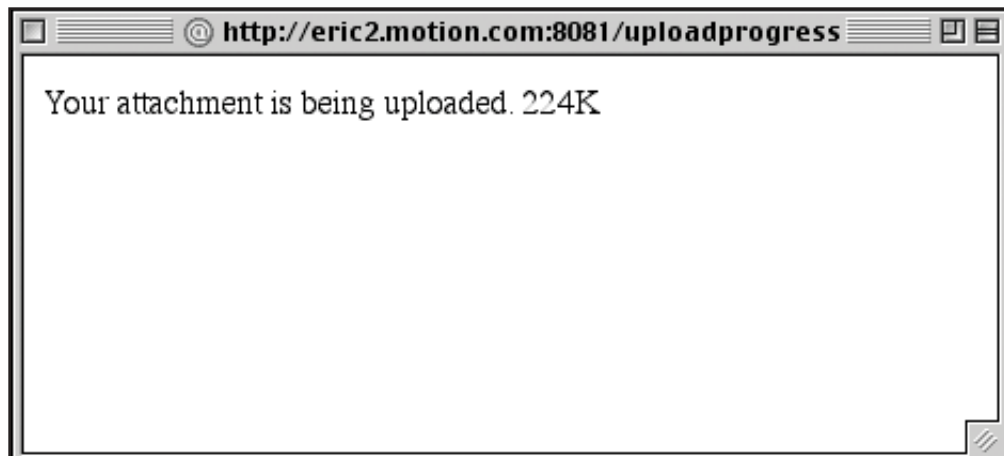
New Attachment window

2. Type the title in the **Title** field.
3. Click . The Open window appears.
4. Select the file to attach.
5. Click . The attachment is listed in the **File** field of the New Attachment window.

7 ATTACHMENTS

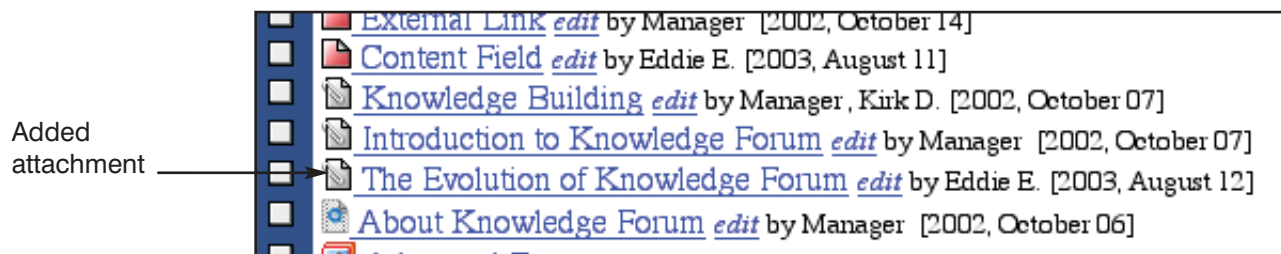
6. Select the view to add the attachment to from the **Views** drop-down list. The default is the current view.
7. Click **Close and Contribute**.

An upload window shows the progress of the attachment being uploaded to the server.



Upload window

Once the attachment is uploaded, it is added to the view.



New attachment

7.2.1 OPENING AN ATTACHMENT IN A VIEW

You can open an attachment from a view.

To open an attachment:

- Click the attachment icon or title link.

The attachment opens in a new window.

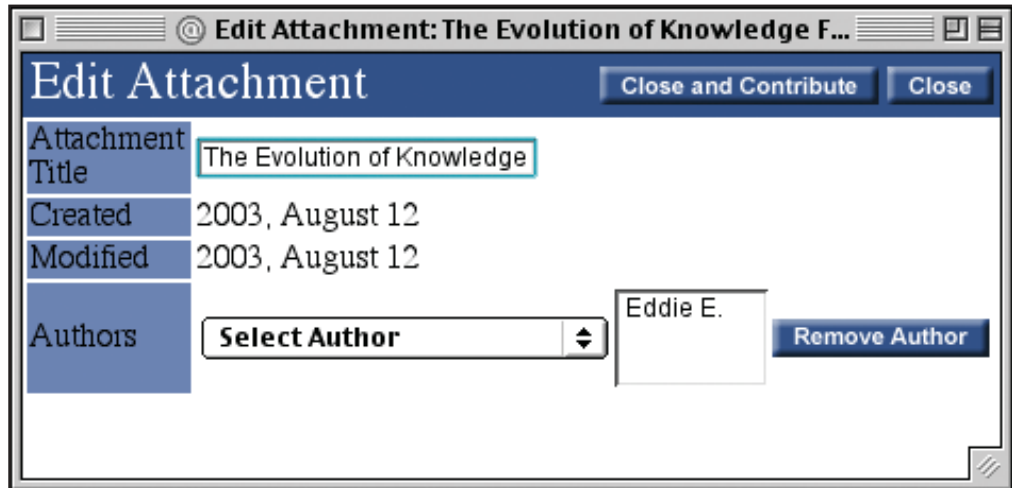
7.2.2 EDITING ATTACHMENT INFORMATION

Note: All editors and managers are considered to be authors.

Attachment authors can edit some attachment information, but not the attachment itself. Knowledge Forum allows you to change the attachment's title and authorship.

To edit attachment information:

1. Click the *edit* link next to the attachment's title. The Edit Attachment window appears.



Edit Attachment window

2. Edit the attachment title if applicable.
3. Add an author, if applicable, by selecting an author from the **Select Author** drop-down list.
4. Remove an author, if applicable, by selecting an author in the **Authors** list box and clicking **Remove Author**.
5. Click **Close and Contribute**.

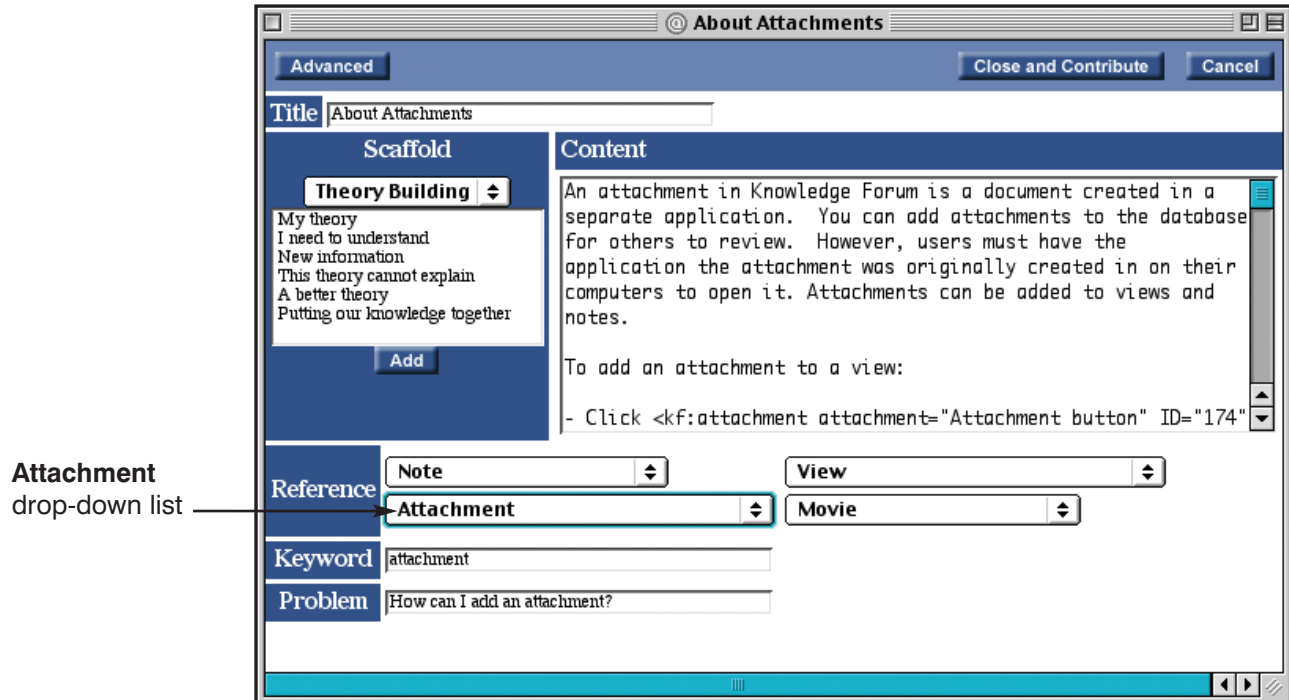
The Edit Attachment window also displays the creation date and the latest modification date.

To close the Edit Attachment window without making changes:

- Click **Close**.

7.3 ADDING AN ATTACHMENT TO A NOTE

You can add a new or existing attachment to a note. This is done by using the **Attachment** drop-down list in the **Reference** section of a note in write mode.



Attachment drop-down list from Reference section

7.3.1 ADDING A NEW ATTACHMENT TO A NOTE

You can add an attachment that does not yet exist in the knowledge base to a note in write mode.

To add a new attachment to a note:

1. Select **Create new attachment** from the **Attachment** drop-down list in the **Reference** section. The New Attachment window appears.
2. Type the title in the Title field.
3. Click **Browse...**. The Open window appears.
4. Select the file to attach.
5. Click **Open**. The attachment is listed in the **File** field of the New Attachment window.

7 ATTACHMENTS

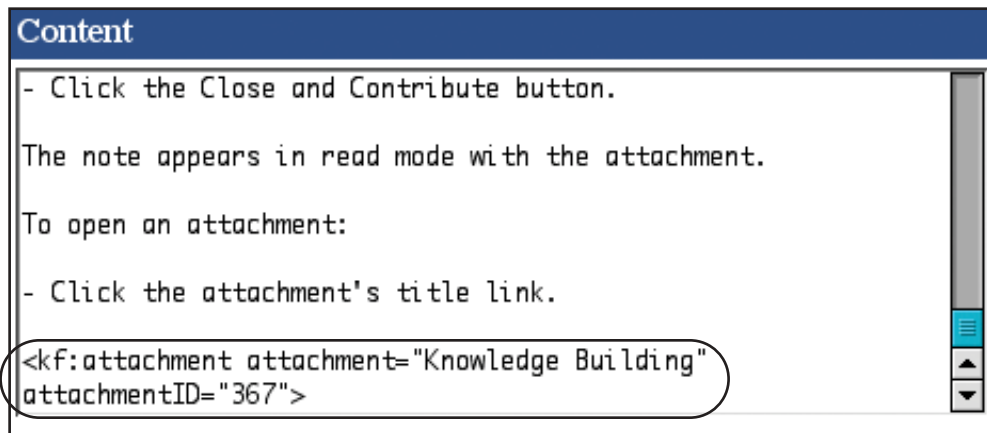
6. Click **Close and Contribute**.

An upload window shows the progress of the attachment being uploaded to the server.

Once the attachment is uploaded, the HTML code for the attachment appears at the end of the **Content** field.

Note: To move the reference to the attachment, copy and paste the entire HTML statement to a new location in the **Content** field.

Attachment
HTML



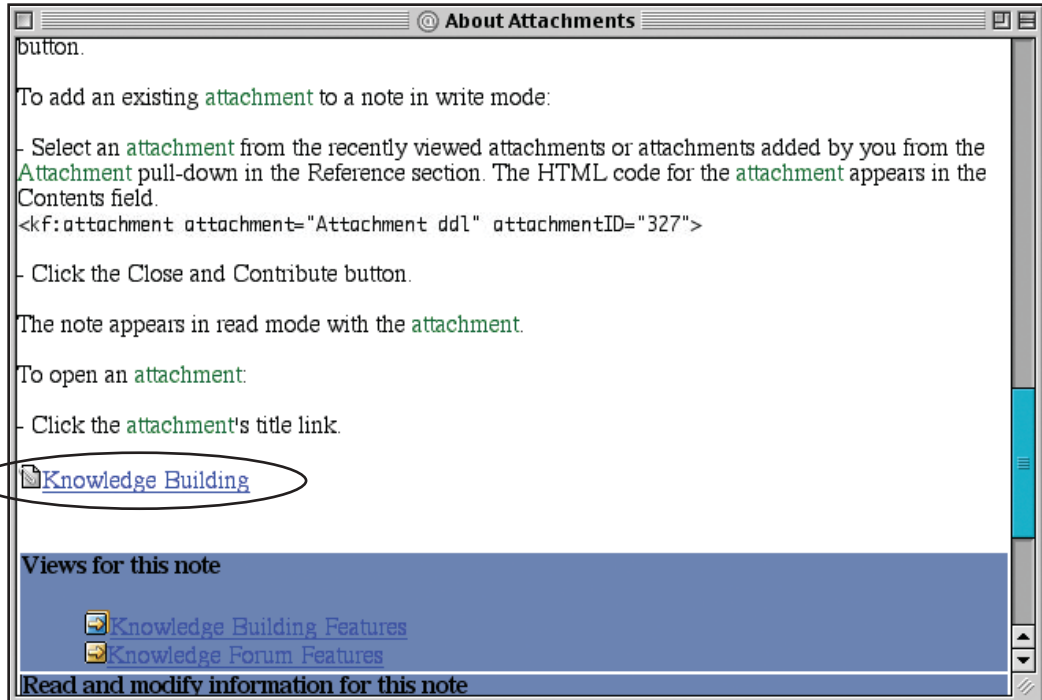
HTML code for the attachment

Note: See section 4.3.2 to learn more about displaying image attachments.

7. Click **Close and Contribute**.

The note appears in read mode with the attachment. You will see the an attachment icon and title—unless your attachment is in an image format accepted by a Web browser (.jpg, .png, or .gif). Such attachments display as pictures.

Note: Your new attachment will not be added to the **Attachment** drop-down list until the next time you open the note.



Attachment added to note in read mode


Note: To move the reference to the attachment, copy and paste the entire HTML statement to a new location in the **Content** field.

Note: See section 4.3.2 to learn more about displaying image attachments.

7.3.2 ADDING AN EXISTING ATTACHMENT TO A NOTE

You can add an existing attachment to a note in write mode.

To add an existing attachment to a note:

1. Select an attachment from the current view, recently viewed attachments, or attachments added by you from the **Attachment** drop-down list in the **Reference** section. The HTML code for the attachment appears in the **Content** field.
2. Click .

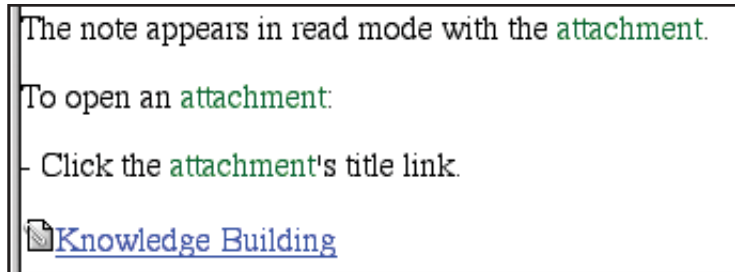
The note appears in read mode with the attachment. You will see the an attachment icon and title—unless your attachment is in an image format accepted by a Web browser (.jpg, .png, or .gif). Such attachments display as pictures.

7 ATTACHMENTS

Note: You cannot edit attachment information from a note.

7.3.3 OPENING AN ATTACHMENT IN A NOTE

You can open an attachment in a read mode note.



Attachment in a read mode note

To open an attachment:

- Click the attachment icon or title link.

The attachment opens in a new window.



8 MOVIES

8.1 INTRODUCTION TO MOVIES

A QuickTime movie can be added to a view or a note. Movies allow you to provide content in a visual form. A QuickTime movie can be referenced and discussed like any other Knowledge Forum object.

With certain browsers, you can reference a specific segment of a QuickTime movie, allowing users to play back that section instead of the entire movie.

Movies can be stored as streaming or progressive QuickTime movies.

Note: To store and access streaming movies, your Knowledge Forum administrator must set up a streaming server and have the Knowledge Forum Server configured for streaming movies.

A streaming QuickTime movie is stored in a streaming format. When you download a streaming movie from the Web, you can access any segment of the movie and just play that segment. For instance, if you want to play a segment 10 minutes into a movie, you can jump to that segment. A streaming movie does not take up stored space on the local hard drive and cannot be saved on the hard drive.

A progressive QuickTime movie is stored on the viewer's computer. It can be downloaded from the Web just like a streaming movie. However, a progressive movie downloads from the first frame and continues to the end. You can play a segment of the movie, but if you want to play a segment 10 minutes into the movie, you need to download the first 9:59 of the movie before it will start playing at 10:00. Progressive movies take up storage on the local drive and can be saved. Most movies you deal with on the Web are progressive.

Note: See section 3.5.3 to learn more about headings.

Tip: To create a .jpg file from a QuickTime movie, copy a frame from a QuickTime movie and save it as a .jpg file in an image editor.

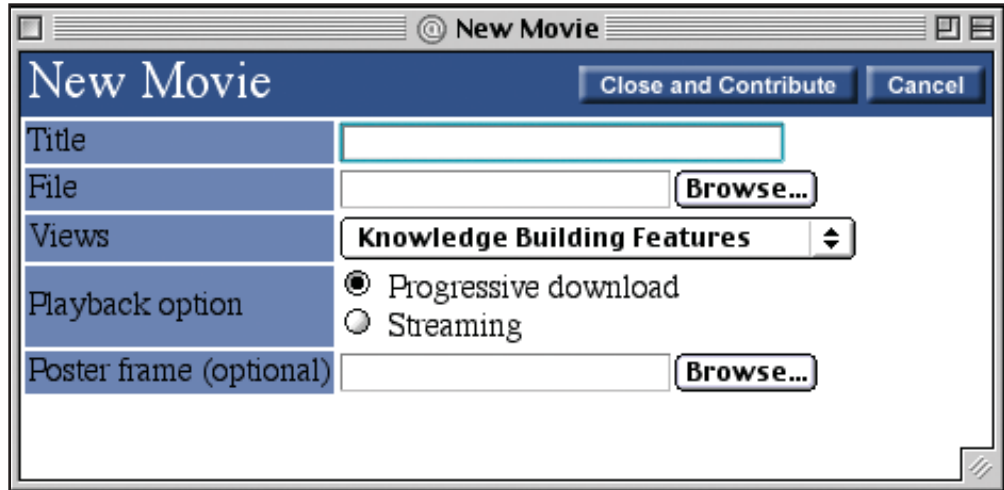
A movie can also have a poster frame associated with it. A poster frame is a .jpg file that acts as a placeholder for a movie that is being displayed in place in a view heading. This avoids a situation where a browser would need to load large movie files each time a view is visited. Poster frames allow the smaller .jpg file to stand in for the movie until a user is ready to play it. Knowledge Forum provides a generic QuickTime poster frame to act as a placeholder for a movie displayed in place in a heading. You can also associate your own poster frame to act as a placeholder.

8.2 ADDING A MOVIE TO A VIEW

You can add a movie to a view.

To add a movie to a view:

1. Click . The New Movie window appears.

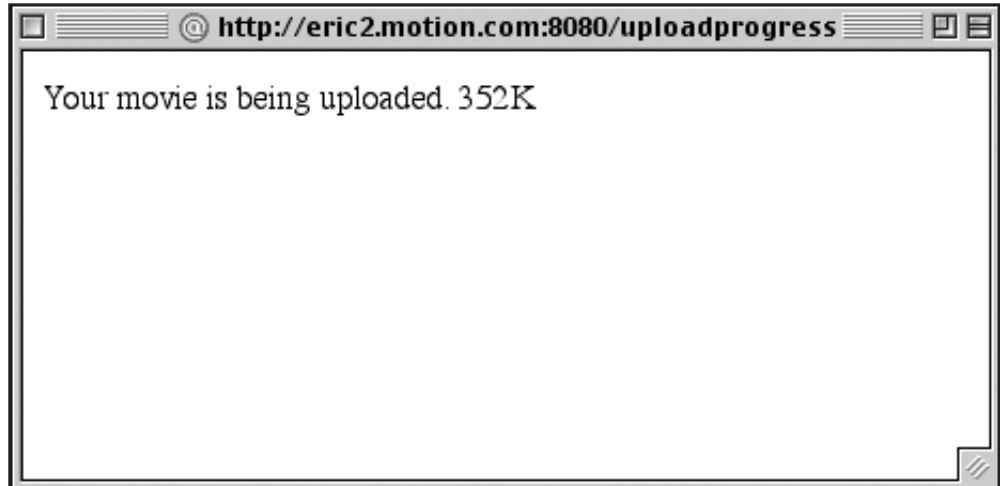


New Movie window

2. Type the title in the **Title** field.
3. Click **Browse...** next to the **File** field. The Open window appears.
4. Select the movie file to attach.
5. Click **Open**. The movie is listed in the **File** field of the New Movie window.
6. Select the view to add the movie to from the **Views** drop-down list. The default is the current view.
7. Select the **Playback** option. The default is **Progressive download**.
8. Click **Browse...** next to the **Poster frame (optional)** field. The Open window appears.
9. Select a .jpg file to associate with the movie.
10. Click **Open**. The .jpg file is listed in the **Poster frame (optional)** field of the New Movie window.
11. Click **Close and Contribute**.

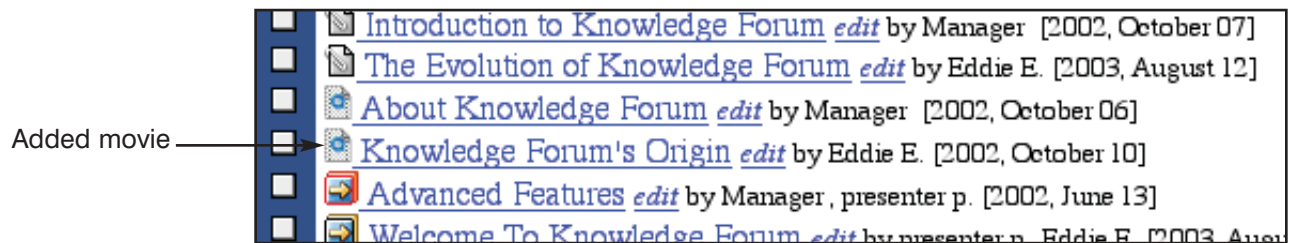
Note: Associating a poster frame, steps 8–10, is optional.

An upload window shows the progress of the movie being uploaded to the server.



Upload window

Once the movie is uploaded, it is added to the view.



New movie

8.2.1 OPENING A MOVIE IN A VIEW

Note: See section 3.5.3 to learn more about headings.

Movies can be in the view heading or the main body of the view. In the main body of the view, and often in the heading, they are represented by the movie icon and title link. However, movies in the view heading may also be displayed in place on your browser and represented by a poster frame placeholder.

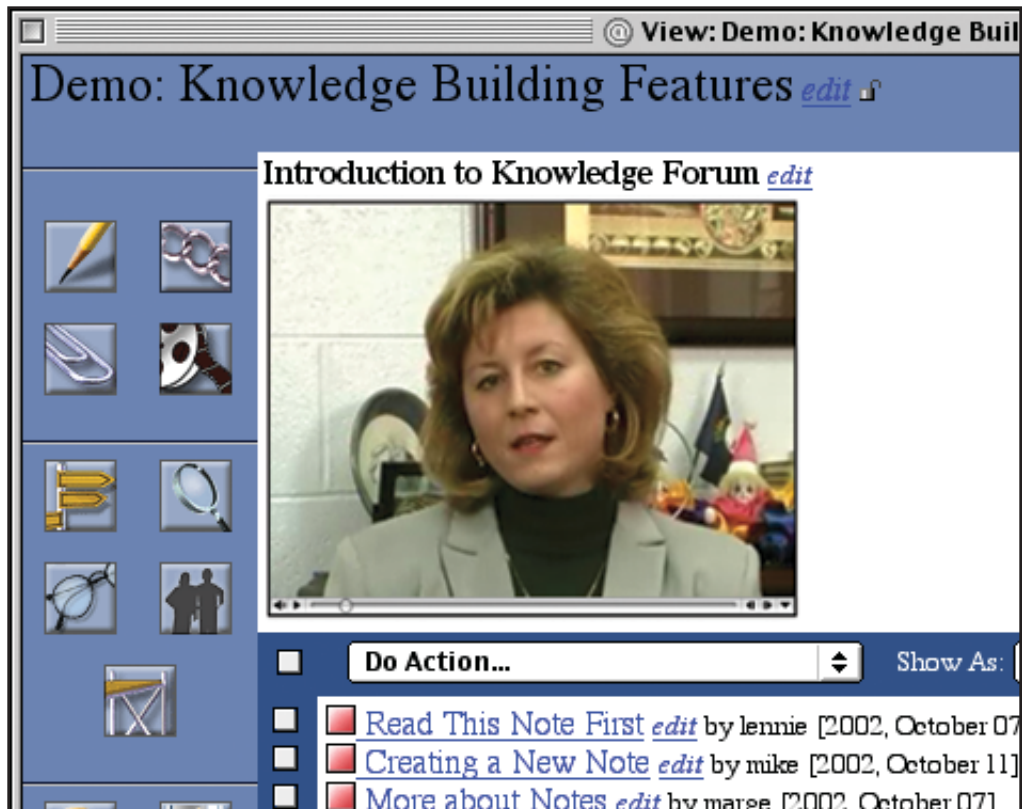
To open a movie:

- Click the movie icon or title link
- Or
- Click the movie placeholder.

If you clicked the movie icon or title link, the movie opens and plays in a new window. If you clicked the movie placeholder, the movie plays in the view heading area.



Movie in new window



Movie in heading

8.2.2 EDITING MOVIE INFORMATION

Note: All editors and managers are considered to be authors.

Movie authors can edit some movie information, but not the movie itself. Knowledge Forum allows you to change the title, authorship, and poster frame of movies listed in a view.

To edit movie information:

1. Click the *edit* link next to the movie's title. The Edit Movie window appears.

Edit Movie window

2. Edit the movie title if applicable.
3. Add an author, if applicable, by selecting an author from the **Select Author** drop-down list.
4. Remove an author, if applicable, by selecting an author in the **Authors** list box and clicking **Remove Author**.
5. Click **Browse...** next to the **Poster frame (optional)** field if applicable. The Open window appears.
6. Select a .jpg file to associate with the movie if applicable.
7. Click **Open** if applicable. The .jpg file is listed in the **Poster frame (optional)** field of the New Movie window.
8. Click **Close and Contribute**.

Note: Associating a poster frame to a movie is not required.

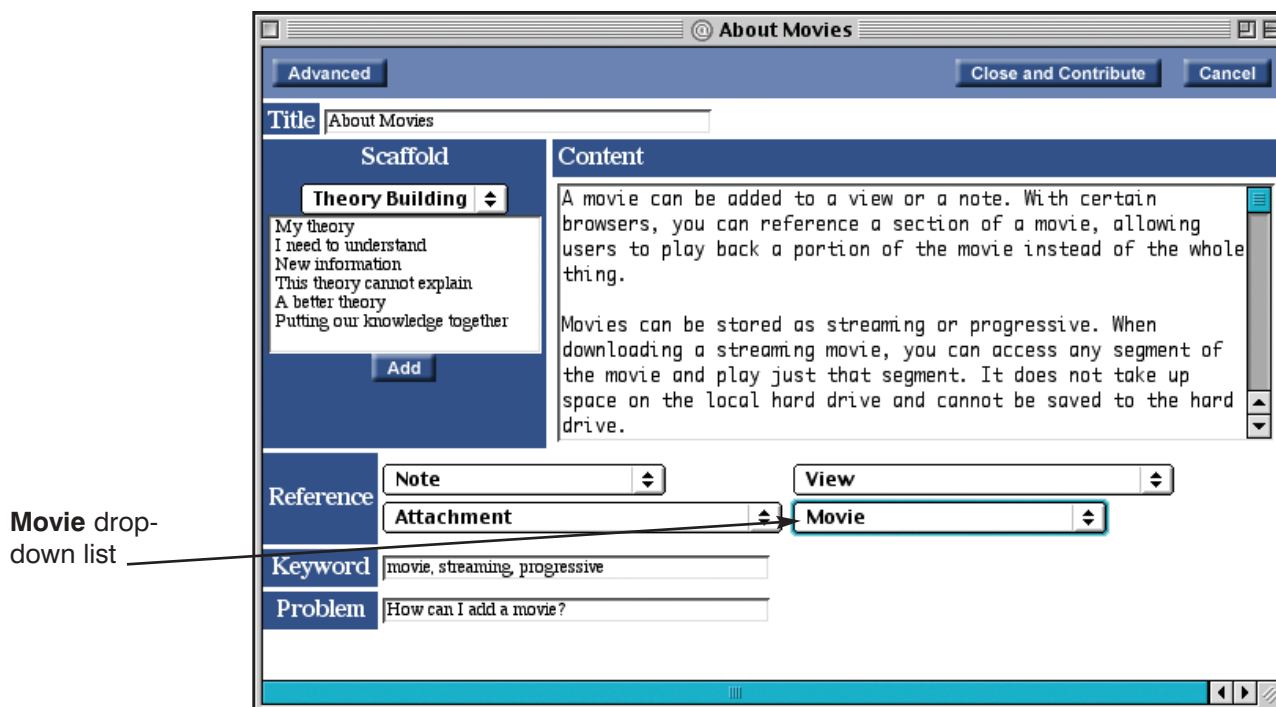
The Edit Movie window also displays the creation date and the latest modification date.

To close the Edit Movie window without making changes:

- Click .

8.3 ADDING A MOVIE TO A NOTE

You can add a new or existing movie to a note. This is done by using the **Movie** drop-down list in the **Reference** section of a note in write mode.



Movie drop-down list from Reference section

8.3.1 ADDING A NEW MOVIE TO A NOTE

You can add a movie that does not yet exist in the knowledge base to a note in write mode.

To add a new movie to a note:

1. Select **Create new movie** from the **Movie** drop-down list in the **Reference** section. The New Movie window appears.

2. Type the title in the **Title** field.
3. Click **Browse...**. The Open window appears.
4. Select the movie file to attach.
5. Click **Open**. The movie is listed in the **File** field of the New Movie window.
6. Select the **Playback** option. The default is **Progressive download**.
7. Click **Close and Contribute**.

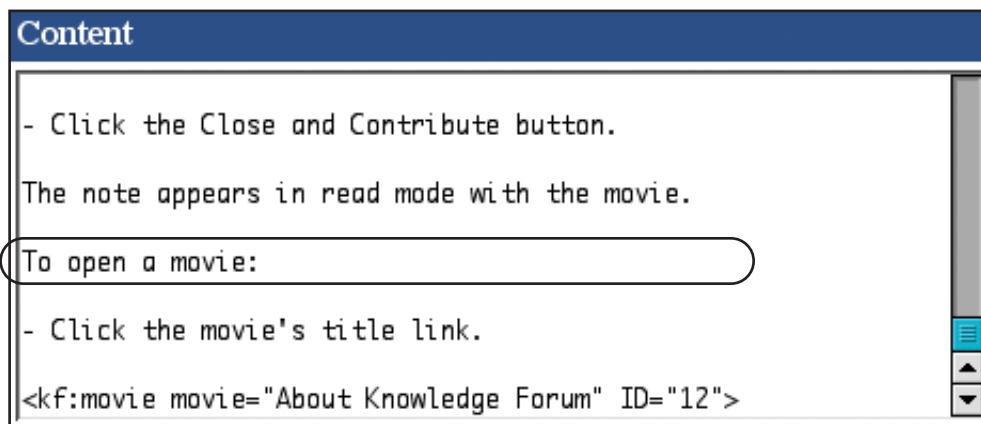
Note: To move the movie reference, copy and paste the entire HTML statement to a new location in the **Content** field.

Note: Your new movie will not be added to the **Movie** drop-down list until the next time you open the note.

An upload window shows the progress of the movie being uploaded to the server.

Once the movie is uploaded, the HTML code for the movie appears at the end of the **Content** field.

Movie HTML

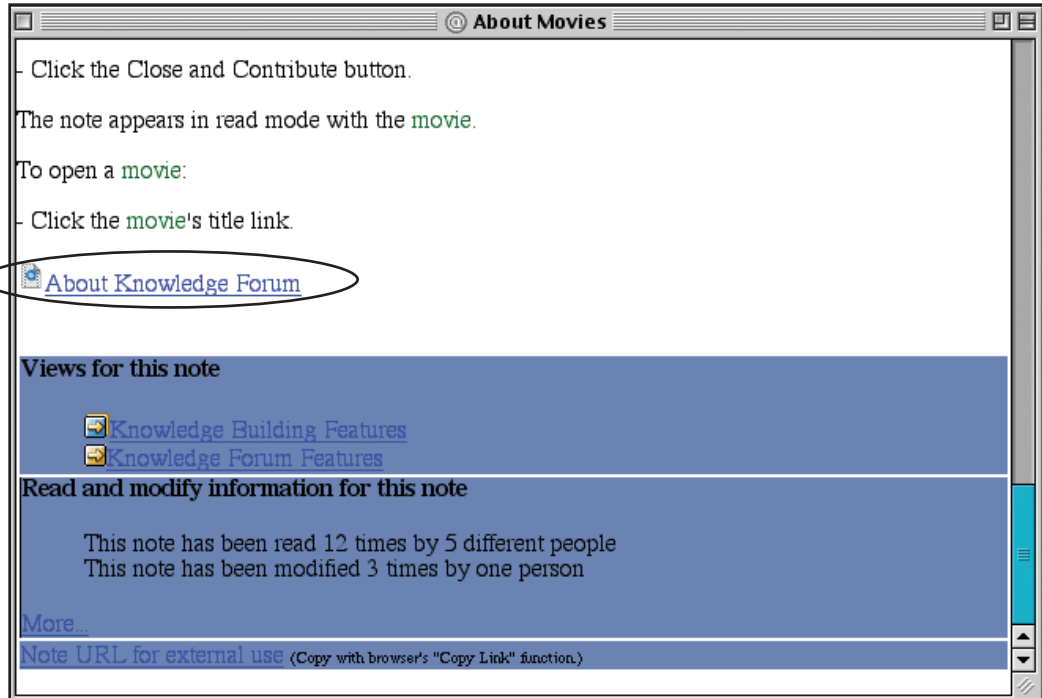


HTML code for the movie

8. Click **Close and Contribute**.

The note appears in read mode with the movie icon and title added.

Movie



Movie added to note in read mode

Note: To move the movie reference, copy and paste the entire HTML statement to a new location in the **Content** field.

Note: You cannot edit movie information from a note.

8.3.2 ADDING AN EXISTING MOVIE TO A NOTE

You can add an existing movie to a note in write mode.

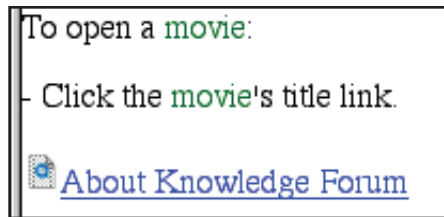
To add an existing movie to a note:

1. Select a movie from the current view, recently viewed movies, or movies added by you from the **Movie** drop-down list in the **Reference** section. The HTML code for the movie appears in the **Content** field.
2. Click **Close and Contribute**.

The note appears in read mode with the movie icon and title added.

8.3.3 OPENING A MOVIE IN A NOTE

You can open a movie in a read mode note.



Movie in a read mode note

To open a movie:

- Click the movie title link.

The movie opens and plays in a new window.

8.4 REFERENCING A SEGMENT OF A MOVIE

Depending on your system, you can reference a segment of a movie in your note. In order to create movie segments, your system must meet one of the following sets of requirements:

- QuickTime 6 with Internet Explorer 5.5sp2 or 6 (Windows)
- QuickTime 6 with Netscape 6.2, 7.01, or 7.02 (Macintosh and Windows)

Note: Apple reports the following bug involving Netscape 6 and OS X:

A bug in the current version of Netscape 6 for Mac OS X causes it not to see the QuickTime plug-in unless a file is copied from the OS X Internet Plugins folder to the Netscape 6 components folder. The file is “**nsIQTScriptablePlugin.xpt**” and the NS6 components folder is usually: /Applications/Mozilla1.0/Mozilla1.0.app/Contents/MacOS/Components/ After the file is copied, Netscape 6 must be told to refresh its components list. This can be done either by deleting the **xpti.dat** file and restarting Netscape, or by issuing the JavaScript command: **navigator.plugins.refresh()**. This bug is marked as fixed for the next release of Netscape and Mozilla.

To reference a segment of a movie in a note:

1. Open the movie. Timecode controls appears at the bottom of the movie window.

Note: The movie timecodes express frame resolution to 1/30th of a second.

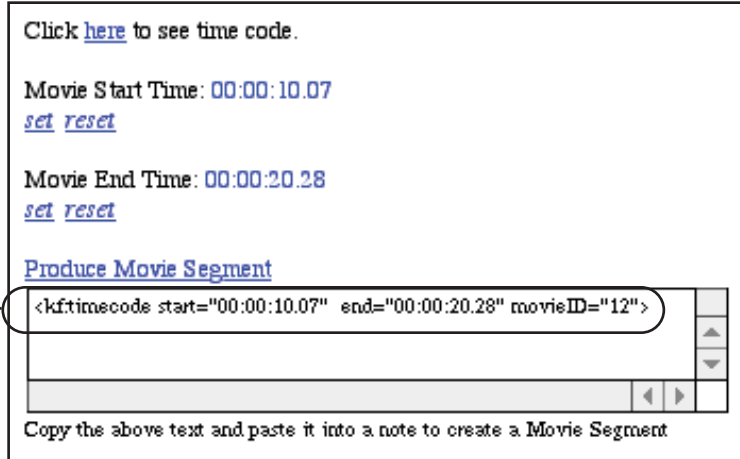
Timecode controls



Movie with timecode controls

Note: You can reset the timecode by clicking [reset](#).

2. Click [set](#) under **Movie Start Time** at the point you want to start the movie reference.
3. Click [set](#) under **Movie End Time** at the point you want to end the movie reference.
4. Click [Produce Movie Segment](#). HTML code will be generated in the text box.



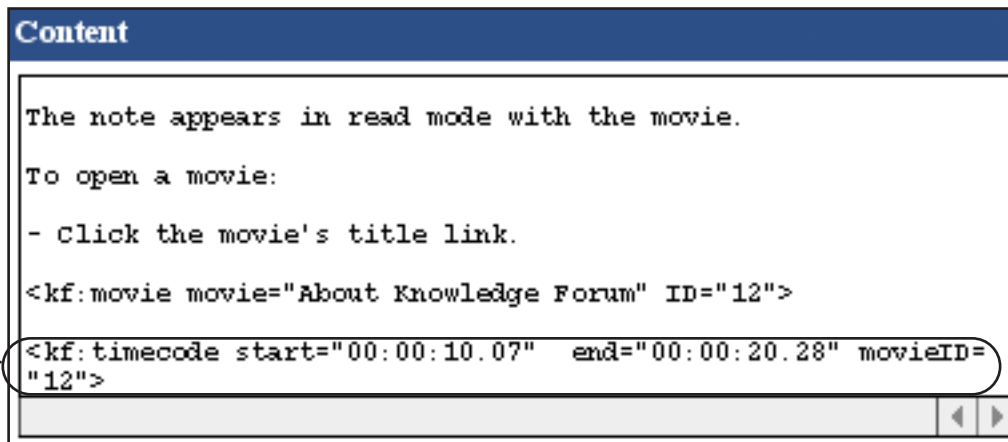
Timecode HTML

Timecode HTML statement

Tip: Use the Macintosh or Windows keyboard commands to copy and paste your material.

To copy, use COMMAND-C (Macintosh) or CTRL-C (Windows).
To paste, use COMMAND-V (Macintosh) or CTRL-V (Windows).

5. Copy the HTML statement.
6. Open a note in write mode.
7. Paste the HTML statement in the **Content** field.



Timecode HTML

Timecode HTML statement in **Content** field

8. Click **Close and Contribute**.

The note appears in read mode with the movie icon, title, and timecode added.



Movie segment link

Movie segment in a read-mode note

8 MOVIES

Users can play the referenced movie segment from a note in read mode.

To play a referenced movie segment in a note:

- Click the referenced movie segment's title. The movie opens and plays the referenced segment.



Click [here](#) to see time code.

[Play complete movie](#) [Play current segment](#) [Play original segment](#)

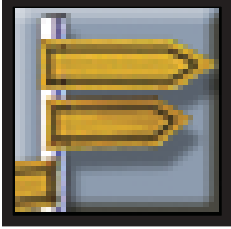
Movie Start Time: 00:00:10.07
[set](#) [reset](#)

Movie End Time: 00:00:20.28
[set](#) [reset](#)

[Produce Movie Segment](#)

Copy the above text and paste it into a note to create a Movie Segment

Playing movie segment



9 VIEW LIST

9.1 INTRODUCTION TO THE VIEW LIST

The View List window provides a list of the views in the database. You can select which type of views to display, add views to a personal hotlist, and create view links in the View List window.

Editors and managers can create and edit views. Some groups can also create views if their editor or manager has given them permission to do so.

9.2 ACCESSING THE VIEW LIST

You can access the View List window from any view by using the **View List** button on the toolbar.

To access the View List window:

- Click .

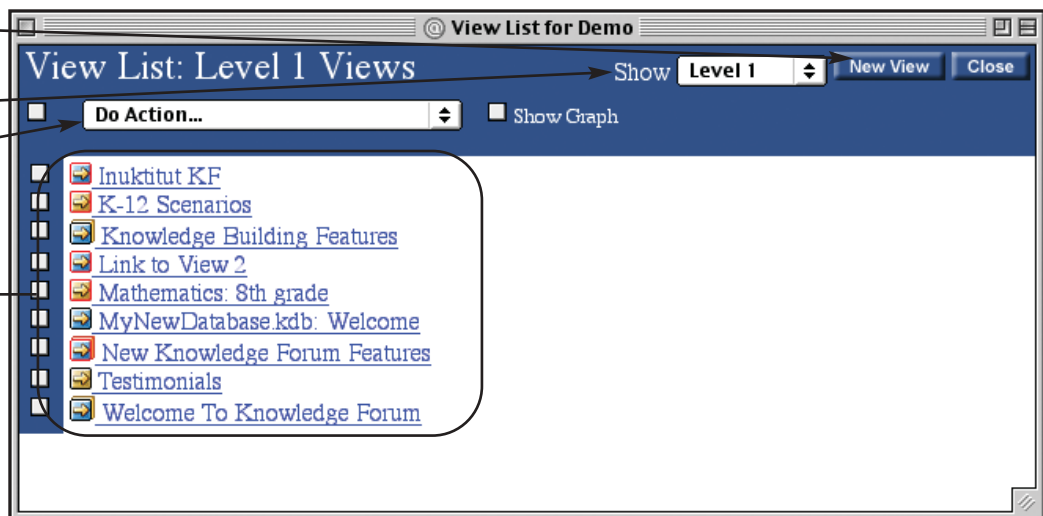
The View List window opens. By default, all first level views in the knowledge base appear the first time you open the View List window during a session.

New View
button

Show drop-
down list

Action bar

Level 1 views



Level 1 views in View List window

To close the View List window:

- Click .

9.3 WORKING WITH THE VIEW LIST

From the View List, you can access views, select the types of views to display, create a hotlist of personal views, create view links, create new views, and edit views. You can also display the Activity graph.

9.3.1 ACCESSING VIEWS FROM THE VIEW LIST

You can access a view from the View List just as you would from a view or note.

To access a view listed in the View List:

- Click the view link.

9.3.2 SHOWING VIEWS

You can display views in the View List window by one of four options in the **Show** drop-down list: Level 1, All Views, My Hotlist, or Editor.



Show drop-down list

Show Option	Description
Level 1	Displays views designated as level 1 by view authors. This is the default display the first time you open the View List window in a Knowledge Forum session.
All Views	Displays a list of all views in the knowledge base.
My Hotlist	Displays views added by you to your personal hotlist. Also shows views added to your group hotlist by an editor or manager.
Editor	Displays views only an editor or manager can access. Does not display unless you are an editor or manager.

Note: See section 9.3.3 to learn more about adding views to your hotlist. See sections 12.4.1 and 12.4.2 to learn more about adding views to the group hotlist.

To select the option for displaying views:

- Select the option from the **Show** drop-down list.

The View List window refreshes and displays based on the chosen option.

9.3.3 ADDING TO THE HOTLIST

You can create a hotlist of views. This list can include views that you use frequently or that are of particular importance. Editors and managers also have the ability to add views to the hotlist of a group of users.

To add views to your hotlist from another view list:

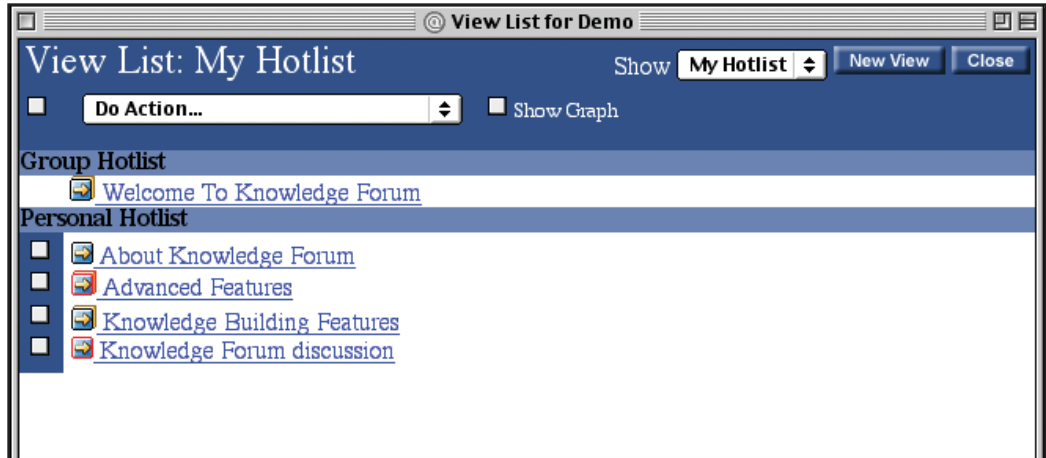
1. Click the check box to the left of each view you want to add.

Tip: To select all views in the list, click the check box to the left of the **Do Action** drop-down list. To clear the selection of a view in the list, click the checked check box to the left of the view.



Views selected in the View List

2. Select **Add To My Hotlist** from the **Do Action** drop-down list. My Hotlist appears.



My Hotlist

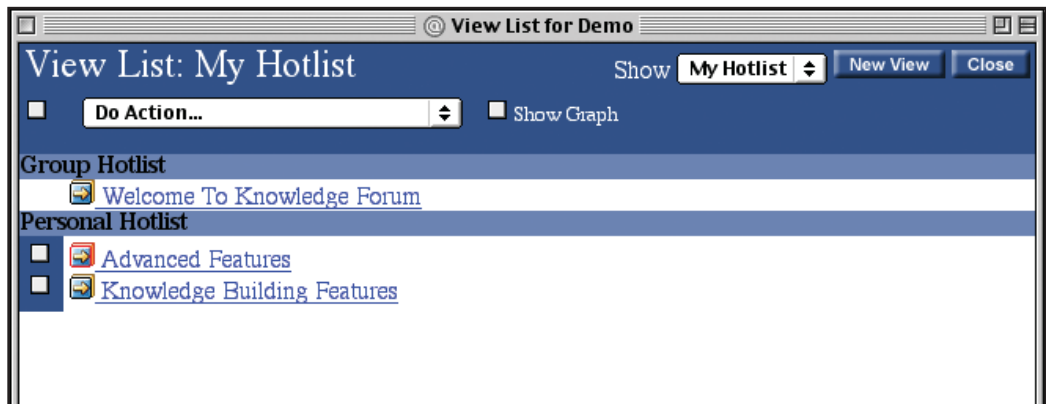
My Hotlist contains the Group Hotlist and the Personal Hotlist. You can open views in these hotlists just as you would using any view link. You can remove views from the Personal Hotlist. Views listed in the Group Hotlist can only be removed by an editor or manager.

Note: See section 12.4.2 to learn more about removing views from the group hotlist.

Tip: To select all views in the list, click the check box to the left of the **Do Action** drop-down list. To clear the selection of a view in the list, click the checked check box to the left of the view.

To remove views from My Hotlist:

1. Click the check box to the left of each view you want to remove.
2. Select **Remove From My Hotlist** from the **Do Action** drop-down list.



Views removed from My Hotlist

Selecting **Remove From My Hotlist** removes the chosen view links from your Personal Hotlist, not the other lists of views.

9.3.4 CREATING A VIEW LINK

You can link a selected view from the View List window, including from My Hotlist, to a different view.

To create view links from the View List window:

1. Click the check box to the left of each view you want to create a view link for.
2. Select the view to add the view links to under *Copy To View* from the **Do Action** drop-down list.

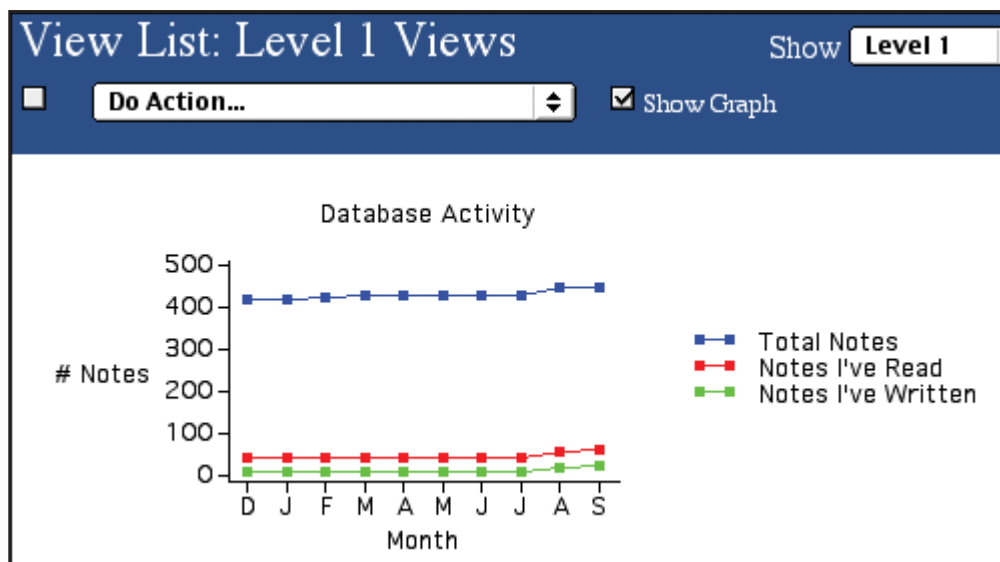
After selecting the view to link to, that view will open.

9.3.5 DISPLAYING THE ACTIVITY GRAPH

Note: The Activity graph also appears on all views. See section 3.5.5 to learn more about the Activity graph.

The Activity graph displays information on all notes in the knowledge base. It shows monthly data on the number of notes in the knowledge base, the number of notes you have read in the knowledge base, and the number of notes you have written in the knowledge base. Ten months worth of note data is displayed. You can use the **Show Graph** check box on the Action bar to show or hide the graph.

Note: The **Show Graph** check box may not appear on your Action bar if **Activity Graphs** is not enabled on your Edit Author window. See section 12.3.1 to learn more about editing your author information.



Activity graph

To show or hide the Activity graph:

- Check or uncheck the **Show Graph** check box to show or hide the graph.

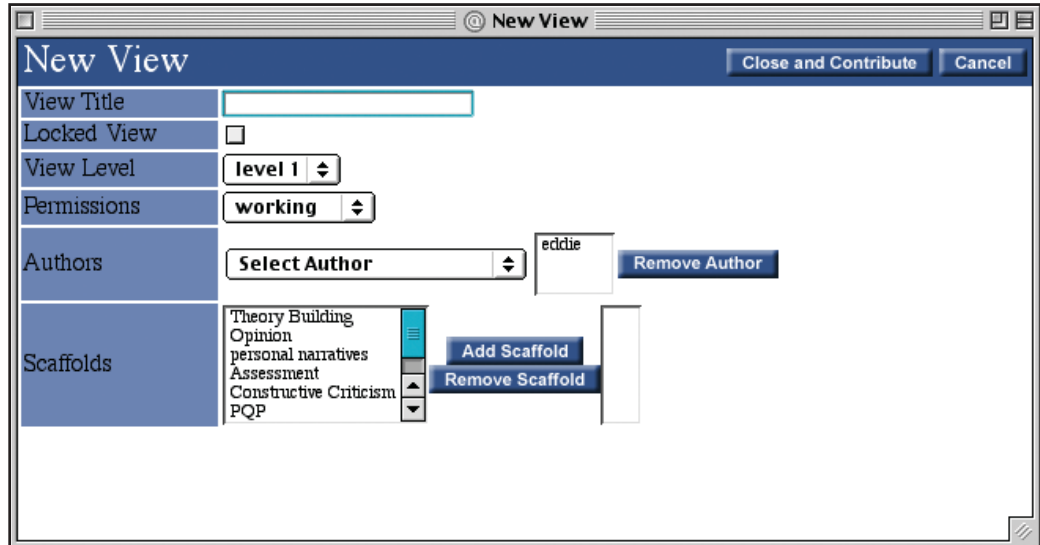
Note: See section 12.4.1 to learn more about allowing writers to create views.

9.4 CREATING A NEW VIEW

Editors and managers can create new views. Writers can create views if their editor or manager has given their group permission to do so.

To create a new view from the View List window:

1. Click **New View**. The New View window appears.



New View window

2. Type the title in the **View Title** field.
3. Click the **Locked View** check box if applicable.
4. Select the view level from the **View Level** drop-down list.
5. Select the permissions setting from the **Permissions** drop-down list.
6. Select an author from the **Select Authors** drop-down list.
7. Repeat step 6 until all the authors you want are added to the **Authors** list box.
8. Select a scaffold from the **Scaffolds** list box.
9. Click **Add Scaffold**.

9 VIEW LIST

- Repeat steps 8 and 9 until all the scaffolds you want are added to the **Scaffolds** list box on the right.
- Click **Close and Contribute**.

The new view appears. The new view will not have any notes, attachments, movies, or view links in it.



New view

To cancel creation of a view before contributing:

- Click **Cancel**.

The following sections describe the view settings in more detail.

9.4.1 VIEW TITLE

The view title should communicate to the knowledge-base community what your view is about. Although you want your title to convey enough of a description to be meaningful, long titles may be truncated in the display.

9 VIEW LIST

Note: The database name appears before the view title.



Database title and view title

Note: All editors and managers are considered to be authors.

9.4.2 LOCKED VIEW

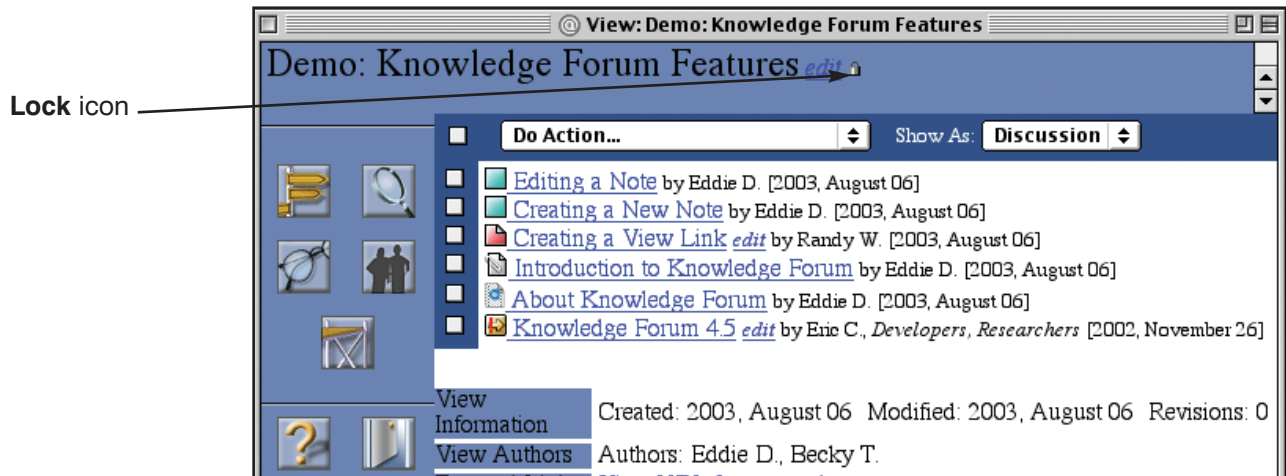
Users cannot make changes to a locked view. View authors can lock and unlock views. A check in the **Locked View** check box means that the view is locked.

Note: View authors can lock and unlock views from the view window. See section 3.4.2 to learn more about locking and unlocking views.



Locked View check box

A locked view will have a closed lock next to its title. Locking a view also removes the **New Note**, **New View Link**, **New Attachment**, and **New Movie** buttons from the toolbar.



Locked view





You may want to lock a view early in the development process—after you have added some Knowledge Forum objects, but before you are ready to allow others to make changes. You may also want to lock a view that will only be used for navigation.

9.4.3 VIEW LEVEL

You can designate a view as level 1 or level 2. Level 1 views are usually considered to be starting places for new users. You will see a listing of level 1 views the first time you enter the View List window during a Knowledge Forum session. The **All Views** selection in the **Show** drop-down list of the View List window displays both level 1 and level 2 views.

9.4.4 PERMISSIONS

You can determine what type of users can see a view. There are four options to choose from.

View Type	Icon	User Access
Working	 (blue)	Writers, editors, and managers can access this view. All three can write to the view, but writers can only change their own Knowledge Forum objects.
Editor	 (gray)	Editors and managers can access this restricted view. It does not appear in the View List window for writers.
Published	 (blue)	All user types can see this view. Readers can only read information on the view. Visitors, writers, editors, and managers can add Knowledge Forum objects to the view.
Private	 (gold)	Only the view authors and managers can access this view. Editors cannot.

9.4.5 AUTHORS

The **Select Author** drop-down list contains the groups and users that can be designated as authors. An author is responsible for the view and can make changes to it. The user creating the view automatically becomes an author of that view. You can add or remove other authors.

Note: See section 12.4.1 to learn more about groups.

Authors

eddie

Remove Author

Authors section

9 VIEW LIST

Note: See section 12.4.1 to learn more about assigning scaffolds to a group. See chapter 13 to learn more about scaffolds.

9.4.6 SCAFFOLDS

You can assign scaffolds to a view. Anyone in the view will see the scaffold chosen for the view, as well as any scaffolds assigned to their group by an editor or manager. Note authors can select and use a scaffold when working with a note in write mode.



Scaffolds section

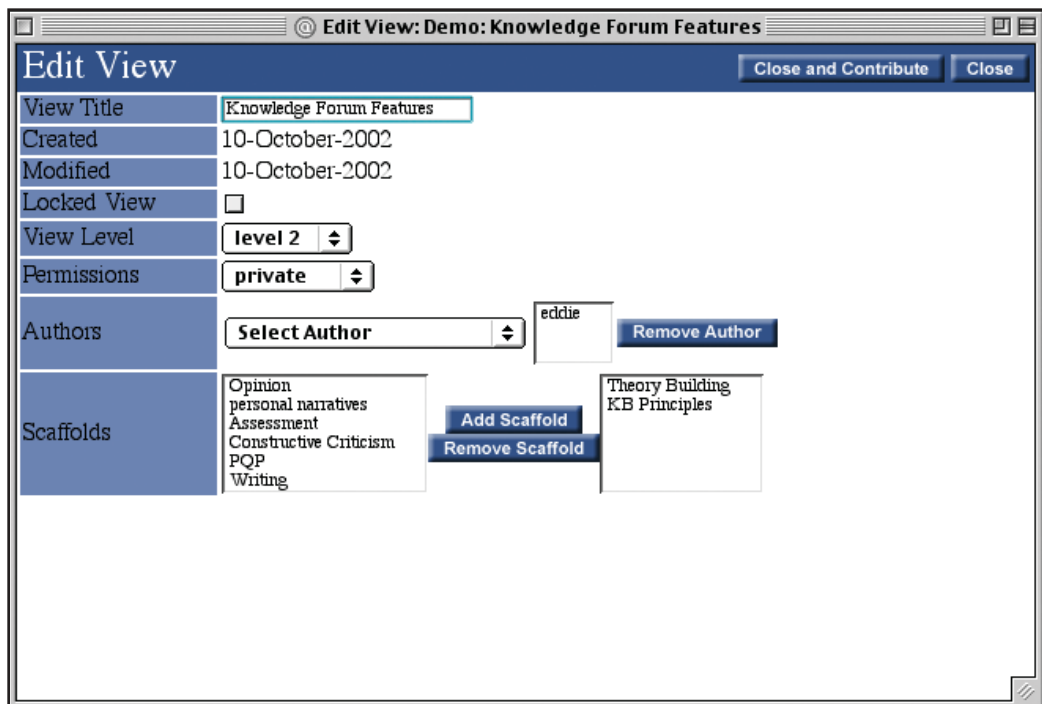
9.5 EDITING VIEW SETTINGS

Note: All editors and managers are considered to be authors.

View authors can edit view settings. They can change the view's title, lock or unlock the view, reset the view level, change permissions, add and remove view authors, and add and remove scaffolds.

To edit a view:

1. Click the *edit* link next to the view's title. The Edit View window appears.



Edit View window

9 VIEW LIST

Note: See section 9.4 to learn more about view settings.

2. Edit the view settings as needed.
3. Click **Close and Contribute**.

You can remove a view author from the **Authors** list box. Perform the following steps before clicking the **Close and Contribute** button when editing view settings.

To remove an author:

1. Select an author from the **Authors** list box.
2. Click **Remove Author**.

You can remove a scaffold from the **Scaffolds** list box. Perform the following steps before clicking the **Close and Contribute** button when editing view settings.

To remove a scaffold:

1. Select a scaffold to remove from the **Scaffolds** list box on the right.
2. Click **Remove Scaffold**.

To cancel edits to a view before contributing:

- Click **Cancel**.



10 SEARCH AND NOTIFICATION

10.1 INTRODUCTION TO SEARCH AND NOTIFICATION

The search option provides a convenient way to find and collect related notes and other Knowledge Forum objects. You can search the knowledge base for notes by text in the note body, keyword, problem, or scaffold support. You can also search for unread notes and notes referencing your notes. You can search for notes, views, attachments, and movies by author, title, view's title, group author belongs to, date created, or date last modified. Editors and managers can also search for cleared and deleted objects. You can work with your search results as you would with objects listed in a view or My Reader. You can also save your searches.

You can create notifications for each saved search. The notification options allows you to receive periodic e-mails containing updated search results based on your saved search criteria.

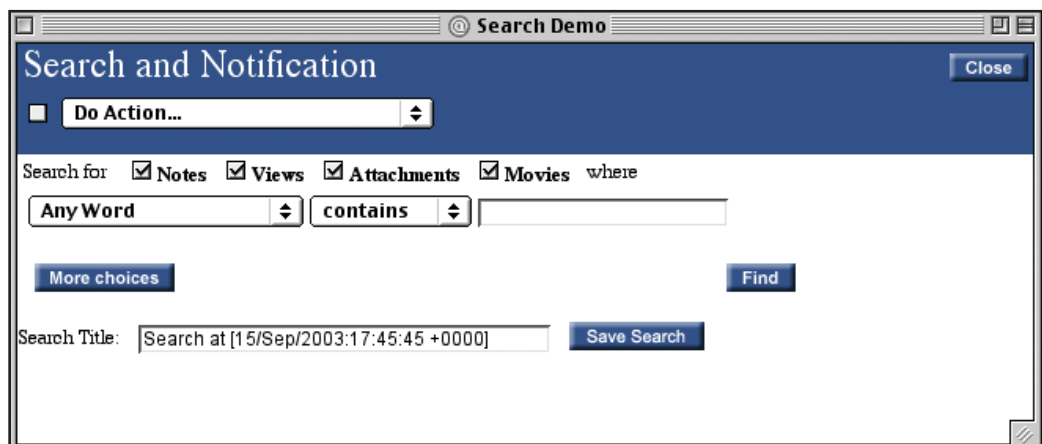
10.2 ACCESSING THE “SEARCH AND NOTIFICATION” WINDOW

You can access the “Search and Notification” window from any view by using the **Search** button on the toolbar.

To access the “Search and Notification” window:

- Click .

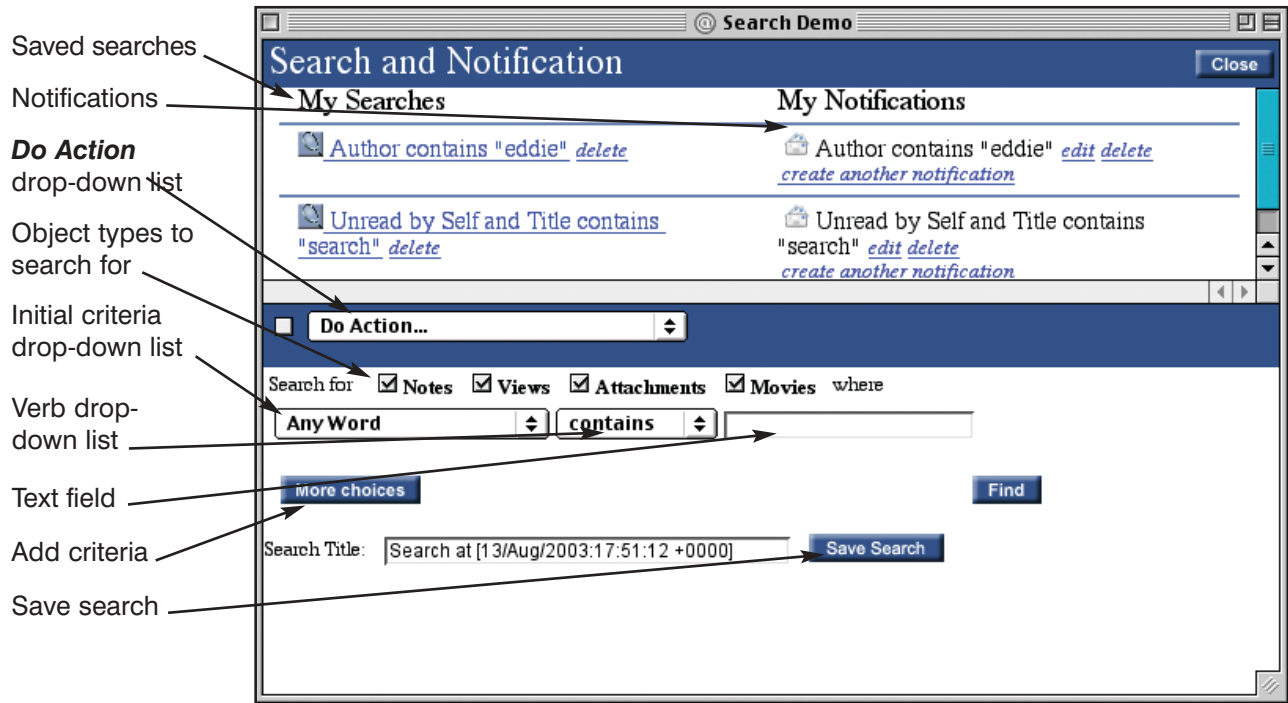
The “Search and Notification” window opens.



“Search and Notification” window without saved searches or notifications

10 SEARCH AND NOTIFICATION

Prior to saving any of your searches and notifications, your “Search and Notification” window will look like the one above. After you save a search and notification, the My Searches and My Notifications areas are added to the “Search and Notification” window.



“Search and Notification” window with saved searches and notifications

To close the “Search and Notification” window:

- Click **Close**.

10.3 SEARCHING

Select the main criteria to search by from the initial drop-down list. You can search by a number of criteria:

Criteria	Searches	Description
Any Word	all objects	Searches for specified text within the body of all objects.
Author	all objects	Searches objects for the specified author text.
Keyword	notes	Searches notes for the specified keyword text.
Title	all objects	Searches objects for the specified title text.
View's Title	views	Searches views for the specified title text and provides all objects from those views.
Problem	notes	Searches notes for the specified problem text.
Support	notes	Searches notes for the specified scaffold support text.
Group	all objects	Searches for all objects authored by a member of a group containing the specified text.
Date Created	all objects	Searches for all objects based on the date the object was created.
Date Last Modified	all objects	Searches for all objects based on the date the object was last modified.
Unread by Self	notes	Searches for notes that you have not read.
Note refers to my note	notes	Searches for notes that reference your notes.
Status	all objects	Searches for active or deleted objects (editors and managers only).
Accessibility	all objects	Searches for cleared or uncleared objects (editors and managers only).

10 SEARCH AND NOTIFICATION

As you can see from the previous table, many of the search criteria allow you to search only for notes. Other search criteria, such as author and title, search for all Knowledge Forum object types. You can limit the scope of those searches by specifying which object type to search for.

Search for **Notes** **Views** **Attachments** **Movies** where

Object check boxes

The initial criteria chosen will determine the remaining **Search** fields available. Generally, the next field is a verb drop-down list, followed by a text field or another drop-down list.

- If you choose **Any Word, Author, Keyword, Title, View's Title, Problem, Support, or Group** as your initial criteria, the verb drop-down list provides three choices: *contains, is, and starts with*. The next field is a text field.
- If you choose **Date Created** or **Date Last Modified**, the verb drop-down list contains a series of timeframe choices based on *is* (for example, *is before, is after, is within the past day*), and then a calendar drop-down list for the month, date, and year.
- If you choose **Status** or **Accessibility** as your initial criteria, the verb drop-down choice is *is*, followed by an *active* or *deleted* drop-down list for **Status**, or a *cleared* or *uncleared* drop-down list for **Accessibility**.
- If you choose **Note refers to my note** as your initial criteria, the verb drop-down choice is *and is*, followed by a drop-down list containing *a reference, a build on, and a rise above*.
- The **Unread by Self** criteria involves no other selections.

For example, if you wanted to search for objects by title, you can choose from *contains, is, and starts with* from the verb drop-down list.



Verb drop-down list

10 SEARCH AND NOTIFICATION


Your verb selection means the following for your search:

Verb Selection	Search Definition
is	Matches entered or selected word exactly.
starts with	Finds words beginning with the specific letter or series of letters entered.
contains	Includes the specified letter or series of letters anywhere in the word.

The results in your search by title, for example, will vary depending upon your verb selection and text entry.

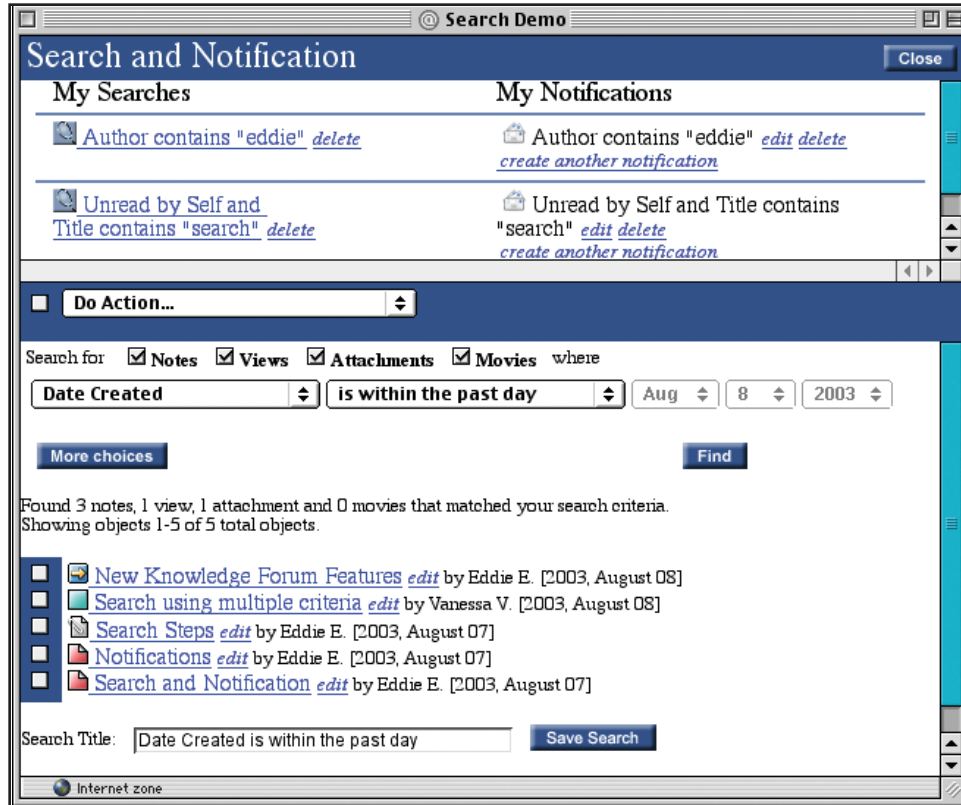
Verb Selection	Text Entry	Result Examples
is	problem	problem
starts with	problem	problem, problems, problematic
contains	pro	problem, problems, problematic, appropriate, protest

To perform a search:

1. Check or uncheck the **Notes, Views, Attachments,** and **Movies** check boxes to indicate the type of Knowledge Forum objects to search for.
2. Select the initial criteria from the first **Search** drop-down list.
3. Select the verb (if applicable) from the second **Search** drop-down list.
4. Complete the third criteria (if applicable). Either type the search term in the text field or select from the drop-down list.
5. Click .

Knowledge Forum lists your search results on the “Search and Notification” window.

10 SEARCH AND NOTIFICATION



Search results

The search results are broken down by object type.

Found 3 notes, 1 view, 1 attachment and 0 movies that matched your search criteria.
Showing objects 1-5 of 5 total objects.

Results by Knowledge Forum object

Up to 50 results will display on the “Search and Notification” window. If your search returns more results, you can advance the page to see the next 50 results by using the **Next** button at the bottom of the window.

Showing objects 51-100 of 293 total objects. [Previous](#) [Next](#)

Results counter

To view the next page of results:

- Click [Next](#).

To view previous page of results:

- Click [Previous](#).

10 SEARCH AND NOTIFICATION

10.3.1 SEARCHING BY MULTIPLE CRITERIA CHOICES

You can perform a search using more than one initial criteria. This allows you to narrow or expand your search.

Note: See section 10.3 to learn more about completing search criteria.

To search by multiple criteria choices:

1. Click **More choices** for each additional criteria choice you want to add.
2. Complete the search field for each criteria choice.
3. Click **Find**.

Knowledge Forum lists your search results at the bottom of the “Search and Notification” window.

The screenshot shows a window titled "Search Demo" with a "Search and Notification" header. It is divided into two columns: "My Searches" and "My Notifications".

- My Searches:** Lists "Author contains 'eddie'" and "Unread by Self and Title contains 'search'", each with a "delete" link.
- My Notifications:** Lists "Author contains 'eddie'" and "Unread by Self and Title contains 'search'", each with "edit delete" and "create another notification" links.

Below these is a "Do Action..." dropdown. The search criteria are defined as:

- Search for: Notes Views Attachments Movies where
- Author is vanessa
- Date Created is within the past week (Aug 13 2003)

Buttons for "More choices", "Fewer choices", and "Find" are present. The results section states: "Found 2 notes, 0 views, 0 attachments and 0 movies that matched your search criteria. Showing objects 1-2 of 2 total objects."

- Object 1: "View Sorting Options" by Eddie E. Vanessa (2003, August 11)
- Object 2: "Search using multiple criteria" by Vanessa V. (2003, August 08)

At the bottom, a "Search Title" field contains "Author is 'vanessa' and Date Created is within" and a "Save Search" button.

Annotations with arrows point to:

- "Date of search" pointing to the date selection fields (Aug 13 2003).
- "Author is vanessa" pointing to the author field.
- "Creation date is within the past week" pointing to the "is within the past week" dropdown.

Multiple criteria search results

If you search for multiple instances of the same criteria (for example, two different authors), Knowledge Forum will search for objects that meet either criteria (such as author A or author B). If you search by multiple criteria (for example, author and title), Knowledge Forum will search for objects that meet both criteria (that is, each object must meet both criteria A and criteria B).

10 SEARCH AND NOTIFICATION

To remove criteria choices:

- Click **Fewer choices** for each additional criteria choice you want to remove. Criteria choices are removed from the bottom first.

10.3.2 SEARCHING FOR CLEARED OBJECTS

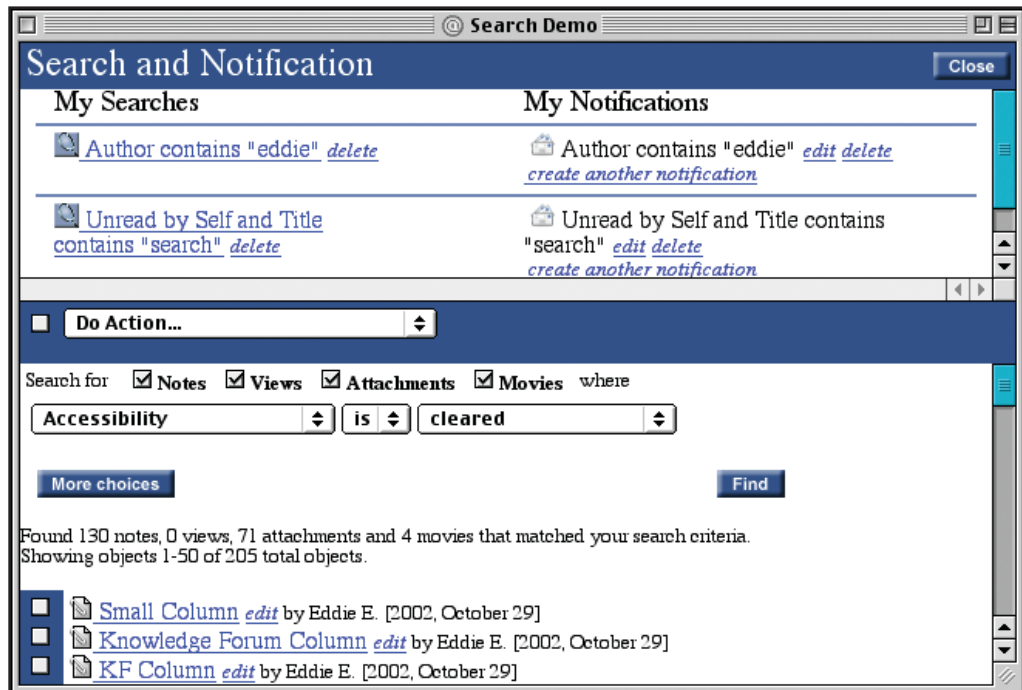
Note: See section 3.5.1 to learn more about clearing objects.

Editors and managers can search for cleared objects.

To search for cleared objects:

1. Check or uncheck the **Notes, Views, Attachments, and Movies** check boxes to indicate the type of Knowledge Forum objects to search for.
2. Select **Accessibility** from the first **Search** drop-down list. The default for the second **Search** drop-down list is *is*.
3. Select *cleared* from the third **Search** drop-down list.
4. Click **Find**.

Knowledge Forum lists all the cleared objects.



Cleared objects

10 SEARCH AND NOTIFICATION

10.3.3 SEARCHING FOR DELETED OBJECTS

Note: See section 3.5.2 to learn more about deleting objects.

Editors and managers can search for deleted objects.

To search for deleted objects:

1. Check or uncheck the **Notes**, **Views**, **Attachments**, and **Movies** check boxes to indicate the type of Knowledge Forum objects to search for.
2. Select **Status** from the first **Search** drop-down list. The default for the second **Search** drop-down list is *is*.
3. Select *deleted* from the third **Search** drop-down list.
4. Click **Find**.

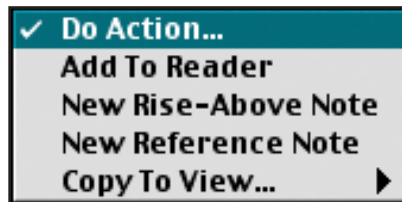
Knowledge Forum lists all the deleted objects.



Deleted objects

10.4 WORKING WITH SEARCH RESULTS

You can work with the list of objects in the search results as you would in a view or My Reader. You can open objects resulting from your search. You can also use the **Do Action** drop-down list to add objects to My Reader, create rise-above notes, create new reference notes, and copy objects to other views.



Do Action drop-down list

Note: See sections 3.3.1 through 3.3.4 to learn more about opening objects in read and write mode.

10.4.1 OPENING AN OBJECT

Objects can be opened in read mode by all user types, or in write mode by authors, editors, and managers.

To open an object in read mode:

- Click the object's title.

The object opens in read mode.

To open an object in write mode:

- Click the *edit* link next to the object's title.

The object opens in write mode.

10.4.2 ADDING AN OBJECT TO MY READER

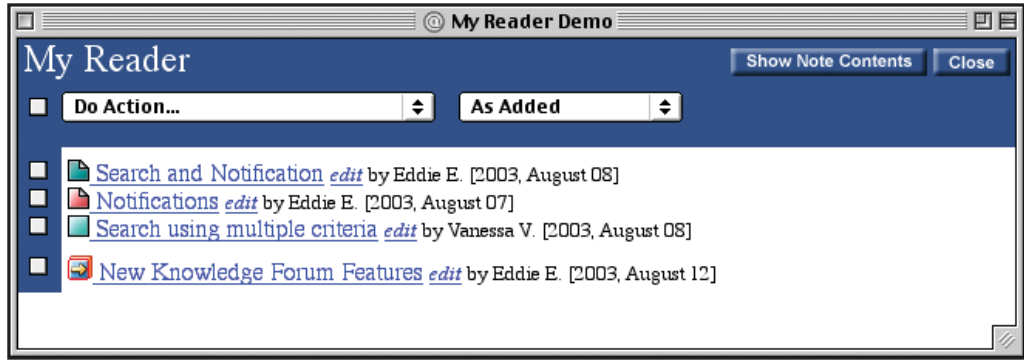
My Reader is a temporary storage area for notes and other Knowledge Forum objects. You can add objects from your search results to the My Reader window.

To add objects to My Reader:

1. Click the check box to the left of each object you want to add.
2. Select **Add to Reader** from the **Do Action** drop-down list.

My Reader appears with the selected objects added.

Tip: To select all the search results, click the check box to the left of the **Do Action** drop-down list. To clear the selection of an object, click the checked check box to the left of the object.



My Reader

Note: See chapter 11 to learn more about My Reader.

From My Reader you can perform any of the normal My Reader functions, such as creating a rise-above note, creating a new reference note, and copying a note to a view.

10.4.3 CREATING A RISE-ABOVE NOTE

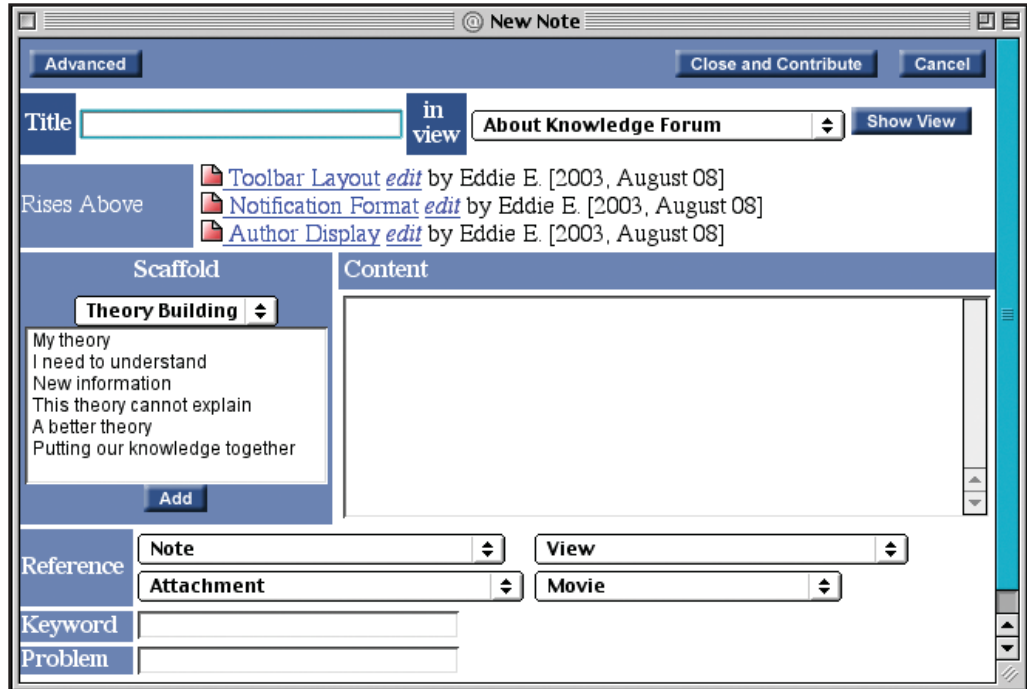
Note: See section 5.5 to learn more about rise-above notes.

You can create a rise-above note from notes in your search results.

To create a rise-above note:

1. Click the check box to the left of each note you want to include in the rise-above note.
2. Select **New Rise-Above Note** from the **Do Action** drop-down list.
3. A new rise-above note is created containing the selected notes. Complete the creation of the new rise-above note.

Tip: To select all the search results, click the check box to the left of the **Do Action** drop-down list. To clear the selection of an object, click the checked check box to the left of the object.



New rise-above note in write mode

4. Click **Close and Contribute**.

The rise-above note appears in the view you selected from the **in view** drop-down list.

Note: See section 4.3 to learn more about creating a note. See section 5.2.1 to learn more about referencing a note.

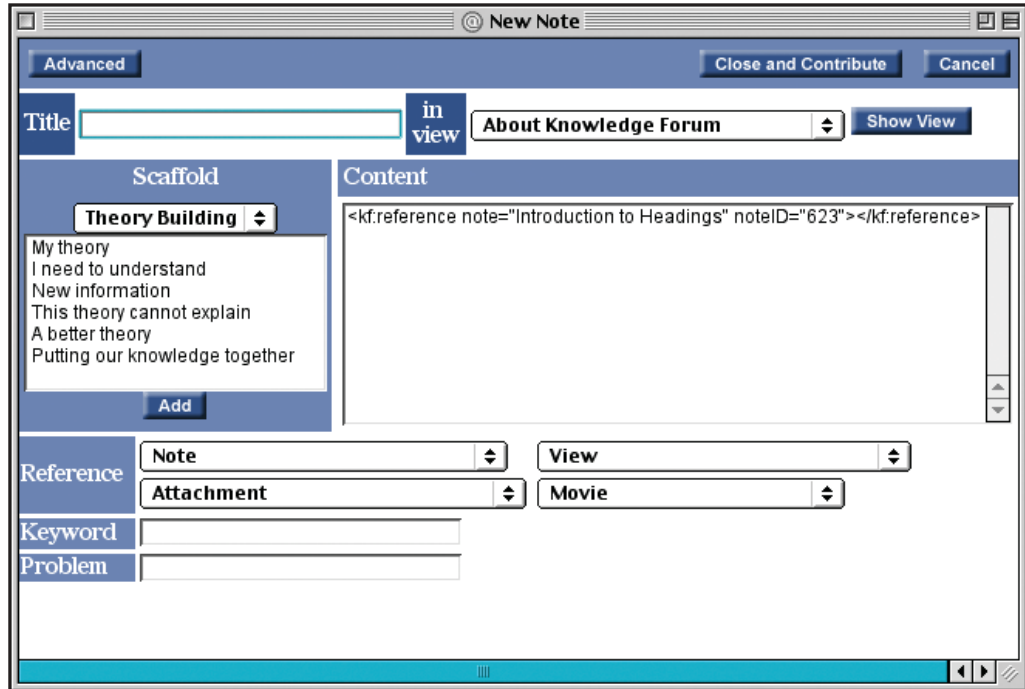
10.4.4 CREATING A NEW REFERENCE NOTE

You can create a new note that references notes in your search results.

To create a new reference note:

1. Click the check box to the left of each note you want to reference.
2. Select **New Reference Note** from the **Do Action** drop-down list.
3. A new note is created with the selected notes inserted as a reference in the **Content** field. Complete the creation of the new note.

Tip: To select all the search results, click the check box to the left of the **Do Action** drop-down list. To clear the selection of a note, click the checked check box to the left of the note.



New note with HTML of referenced notes

4. Click **Close and Contribute**.

The referenced note appears in the view you selected from the **in view** drop-down list.

Note: See section 3.5.4 to learn more about copying objects to a view.

10.4.5 COPYING OBJECTS TO A VIEW

You can copy objects from your search results to a view.

To copy objects to a view:

1. Click the check box to the left of each object you want to copy.
2. Select a view under *Copy To View* from the **Do Action** drop-down list.

The view you copied the objects to appears.

Tip: To select all the search results, click the check box to the left of the **Do Action** drop-down list. To clear the selection of an object, click the checked check box to the left of the object.

10.5 SAVING SEARCHES

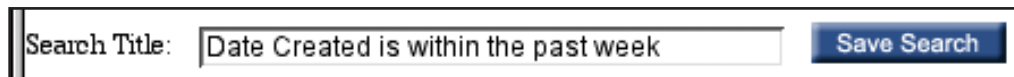
You can save, edit, and delete your searches. Knowledge Forum lists your saved searches alphabetically in the My Searches area of the “Search and Notification” window. You can view only your own saved searches. Saved searches become the basis for e-mail notification.

Note: See section 10.6 to learn more about notifications.

Note: The search title provided comes from the search criteria.

To save a search:

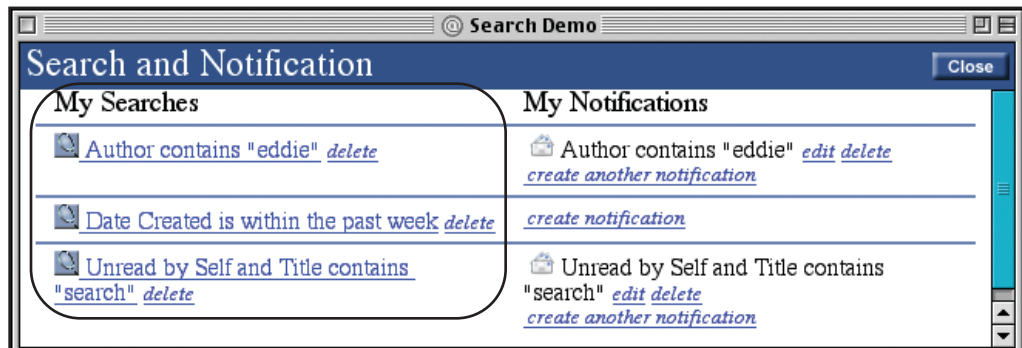
1. Type a search title in the **Search Title** field or accept the search title provided.



Search Title

2. Click **Save Search**.

The search is added to My Searches.



My Searches

If you want to run a saved search, or use a saved search as the basis for a new search, select the saved search from My Searches. The search criteria appears in the search area.

To use a saved search:

1. Click the saved search under My Searches. The saved search criteria will appear in the search area.
2. Edit the search criteria (if applicable).
3. Click **Find**.

10 SEARCH AND NOTIFICATION

Knowledge Forum lists your search results on the “Search and Notification” window.

If you made changes to the search, you can save it as a new search or replace the old search.

To save an edited search:

1. Type a search title in the **Search Title** field or accept the search title provided.
2. Check the **As New Search** check box to save the search as a new search (if applicable).

Search Title: <input notification\""="" type="text" value="Unread by Self and Title contains \"/>	<input type="button" value="Save Search"/>
	<input checked="" type="checkbox"/> As New Search

Save as a new search

3. Click .

The new search is added to My Searches if you checked the **As New Search** check box. Otherwise, the search replaces the original search.

Finally, you can delete obsolete searches.

To delete a saved search:

- Click the *delete* link next to the search under My Searches.

My Searches	My Notifications
 Author contains "eddie" <i>delete</i>	 Author contains "e create another notificati

Delete link

The search is removed from My Searches.

10.6 NOTIFICATIONS

You can send periodic e-mail notifications with updated results for each saved search. Notifications are associated with specific searches and are listed by search under My Notifications on the “Search and Notification” window. You can create multiple notifications for each search. Notifications are sent every 12 hours, every 24 hours, weekly, or monthly. Notification e-mails can be formatted in HTML or plain text, and contain links to the search results. You may need to log on to Knowledge Forum to link to a selected search result.

To create a notification:

1. Click the *create notification* or *create another notification* link next to the search. The New Notification window appears.

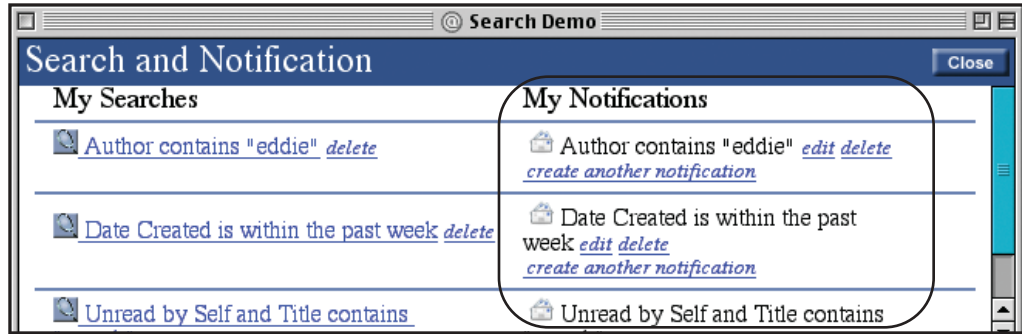
New Notification window

2. Type a notification title in the **Notification Title** field or accept the notification title provided.
3. Select the e-mail frequency from the **Send E-Mail** drop-down list.
4. Select the notification format, HTML or plain text.
5. Check the **Send notification even if it's empty** check box if applicable.
6. Type an e-mail address in the **E-Mail** field or accept the default e-mail provided.
7. Click **Close and Contribute**.

The notification is added to My Notifications on the “Search and Notification” window.

Note: The **Notification** section and **E-Mail** field are also set in the Edit Author window. See section 12.3.1.

Tip: The **Notification** section and **E-Mail** field are global notification settings. Any changes to these items will impact all your notifications.

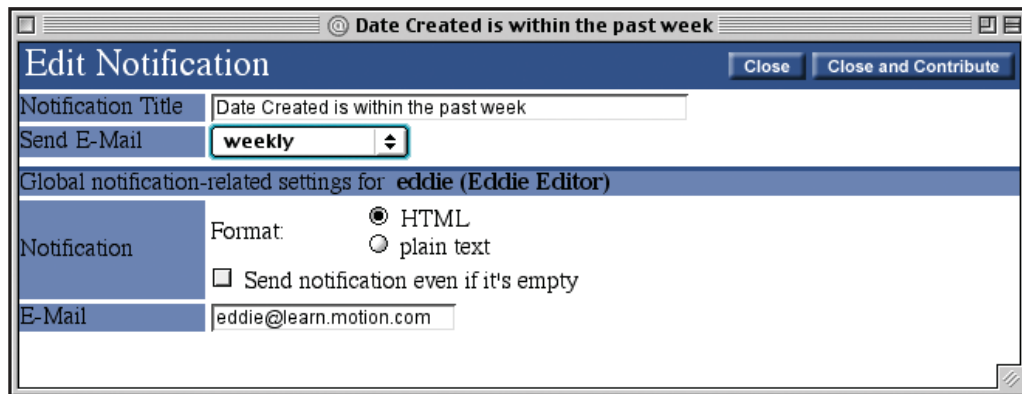


My Notifications

After the notification are links to edit or delete the notification, or to create another notification.

To edit a notification:

1. Click the *edit* link next to the search. The Edit Notification window appears.
2. Edit the notification items as needed.



Edit Notification window with **Send E-Mail** drop-down list edited

3. Click **Close and Contribute**.

The changes to the notification are saved.

Finally, you can delete a notification from a search.

To delete a notification:

- Click the *delete* link next to the notification.

The notification is removed from My Notifications.



11 MY READER

11.1 INTRODUCTION TO MY READER

My Reader provides a temporary storage area for collecting related notes, attachments, movies, and views from multiple sources. You can work with My Reader as you would with objects listed in a view or your search results. You can open objects, create a rise-above note, create a reference note, and copy objects to another view from My Reader.

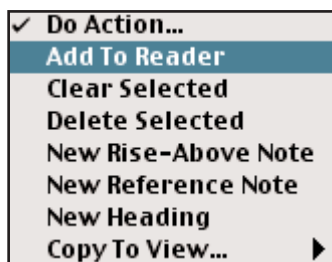
11.2 ADDING TO MY READER

You can add all object types to the My Reader window from a view.

To add objects to My Reader:

1. Click the check box to the left of each object you want to add.
2. Select **Add To Reader** from the **Do Action** drop-down list.

Tip: To select all the objects, click the check box to the left of the **Do Action** drop-down list. To clear the selection of an object click the checked check box to the left of the object.



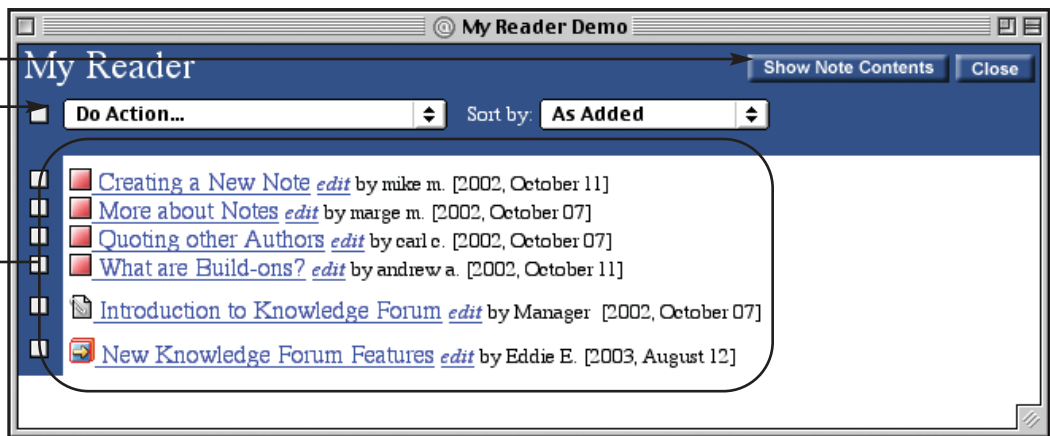
Selecting **Add To Reader**

The My Reader window opens with the added objects.

Shows or hides note contents

Action bar

Objects in My Reader



My Reader window

11.3 ACCESSING MY READER

You can access the My Reader window from any view by using the **My Reader** button on the toolbar.

To access the My Reader window:

- Click .

The My Reader window opens. It will only hold objects added to it during the current Knowledge Forum session.

To close the My Reader window:

- Click .

My Reader will hold its contents as long as you are logged on to Knowledge Forum. If you exit Knowledge Forum, the My Reader window will be empty the next time you log on.

11.4 MY READER DISPLAY

You can open objects, clear My Reader, show or hide note content, and sort notes in My Reader.

11.4.1 OPENING AN OBJECT

You can open objects in My Reader in read mode.

To open an object:

- Click the object's icon or title.

The object opens.

Note: You cannot open an object in write mode directly from My Reader.

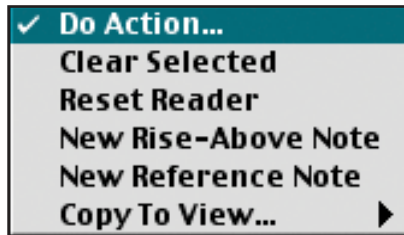
11.4.2 CLEARING MY READER

You can clear objects from the My Reader window.

Tip: To clear the selection of an object, click the checked check box to the left of the object.

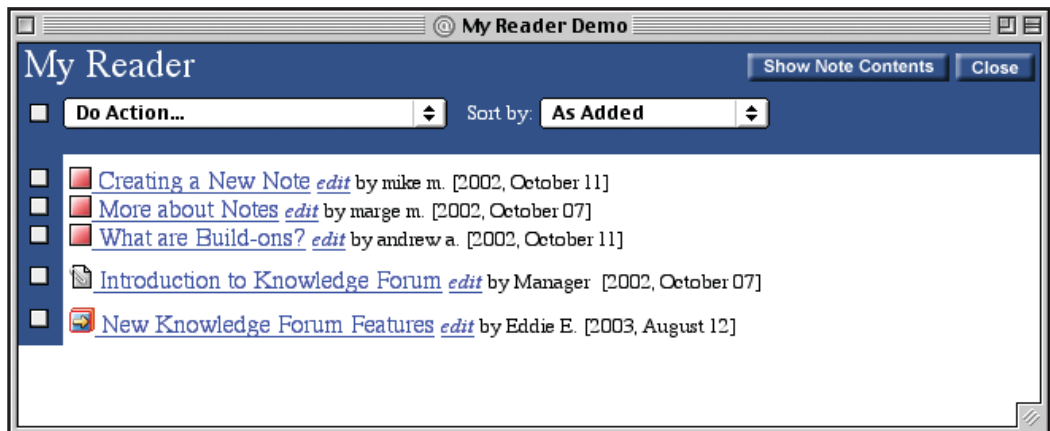
To clear objects from My Reader:

1. Click the check box next to the left of each object you want to clear.
2. Select **Clear Selected** from the **Do Action** drop-down list.



My Reader's **Do Action** drop-down list

Knowledge Forum clears the objects from My Reader. The objects are not cleared from any of the views they exist on.



"Quoting other Authors" note cleared

11 MY READER

To clear all objects from My Reader (two options):

Option 1

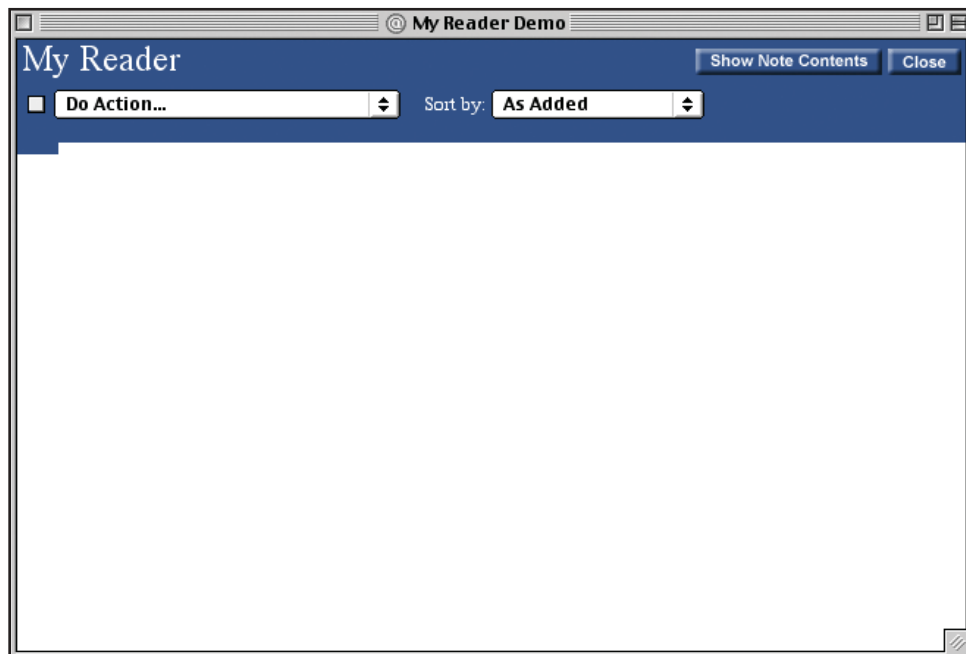
1. Click the check box to the left of the **Do Action** drop-down list. All objects are selected.
2. Select **Clear Selected** from the **Do Action** drop-down list.

Knowledge Forum clears all objects from My Reader.

Option 2

- Select **Reset Reader** from the **Do Action** drop-down list.

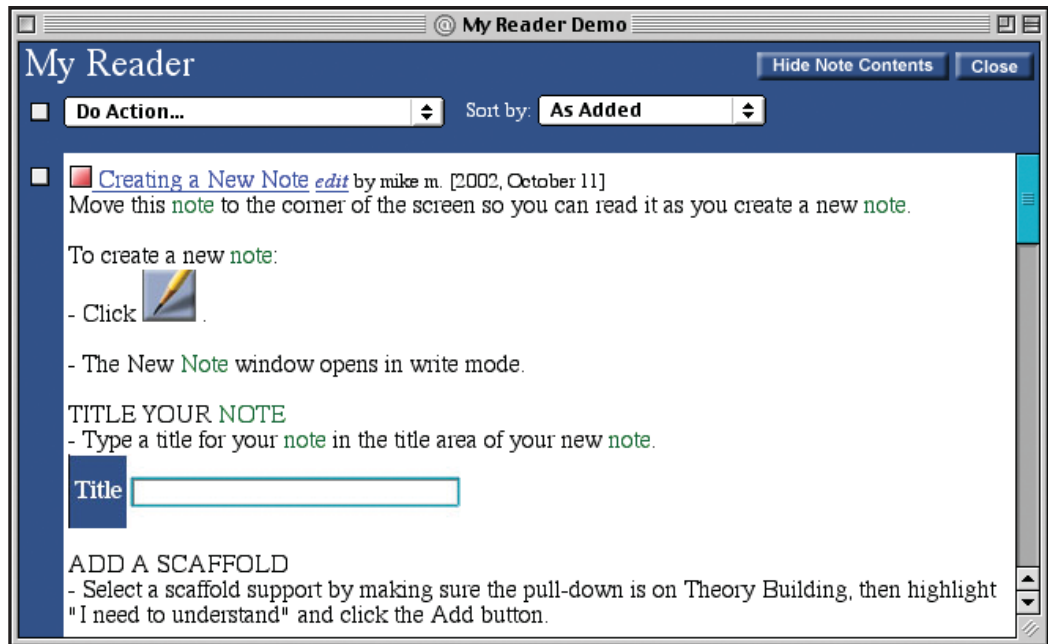
Knowledge Forum removes all objects from My Reader.



Empty My Reader

11.4.3 SHOWING AND HIDING NOTE CONTENTS

You can display or hide the contents for each note listed in My Reader.



Showing note contents

To show or hide the note contents in My Reader:

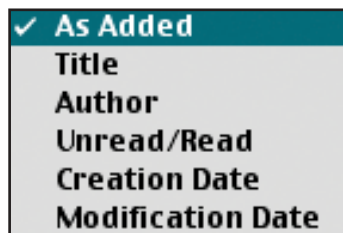
- Click **Show Note Contents** or **Hide Note Contents**.

11.4.4 SORTING NOTES

You can sort notes in My Reader by the order in which they were added, title, author, read versus unread status, creation date, and modification date.

To sort the listed notes:

- Select the sorting method from the **Sort by** drop-down list.



Sort by drop-down list

Note: See section 5.5 to learn more about rise-above notes.

Tip: To select all the objects, click the check box to the left of the **Do Action** drop-down list. To clear the selection of an object click the checked check box to the left of the object.

11.5 CREATING A RISE-ABOVE NOTE

You can create a rise-above note from notes and other objects in My Reader.

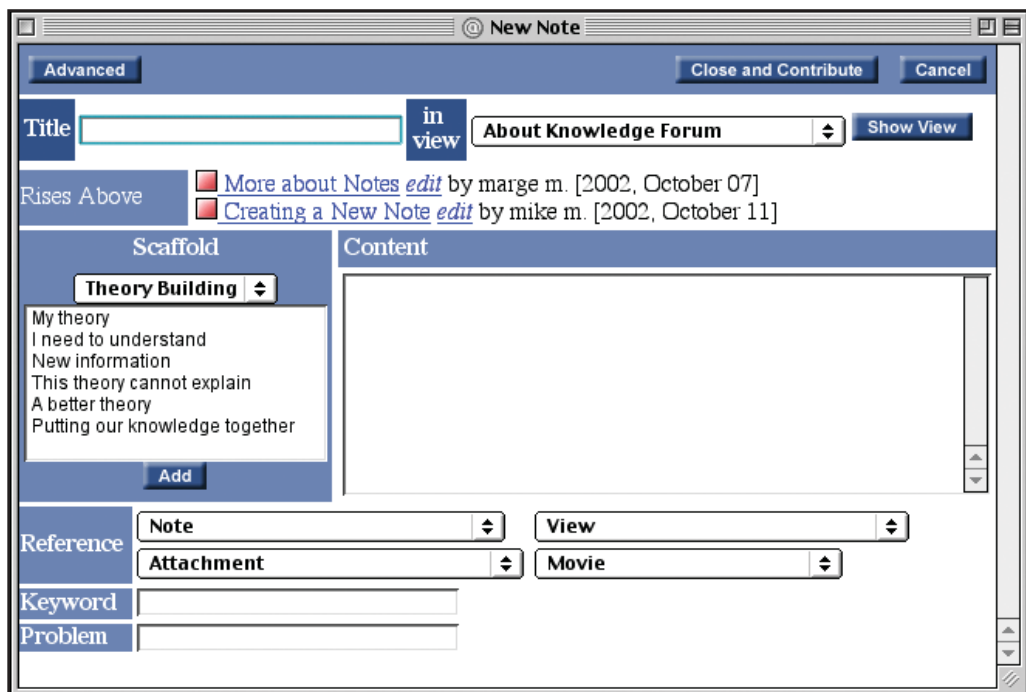
To create a rise-above note:

1. Click the check box to the left of each note you want to include in the rise-above note.



Notes selected

2. Select **New Rise-Above Note** from the **Do Action** drop-down list.
3. A new rise-above note is created containing the selected notes. Complete the creation of the new rise-above note.



New rise-above note in write mode

4. Click **Close and Contribute**.

The rise-above note appears in the view you selected from the **in view** drop-down list.

Note: See section 5.2.1 to learn more about referencing a note.

11.6 CREATING A NEW REFERENCE NOTE

You can create a new note that references notes and other objects in My Reader.

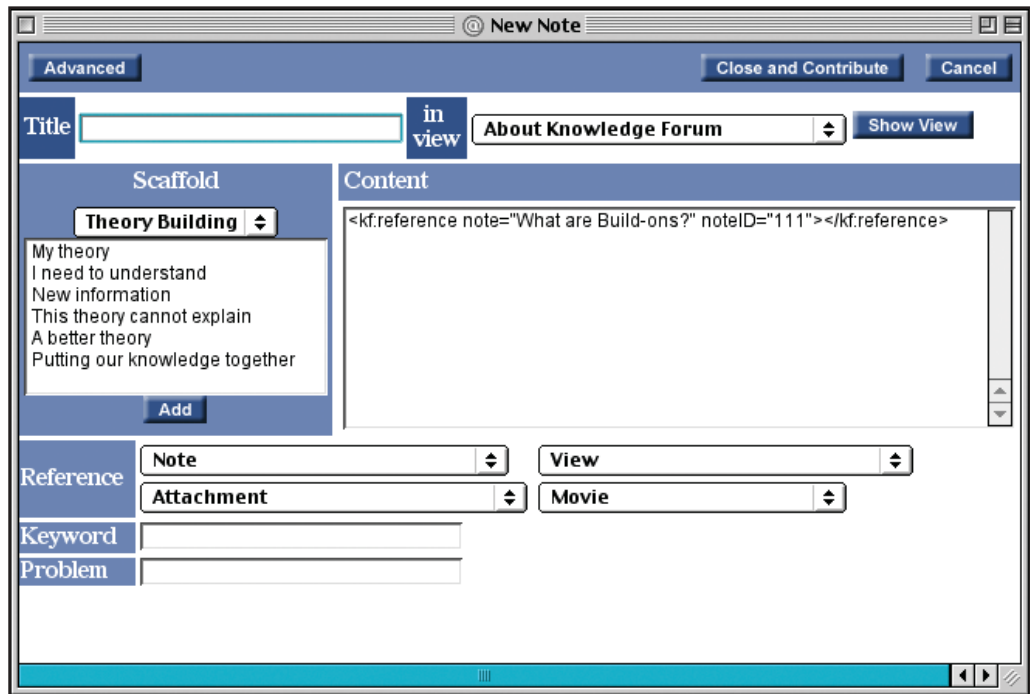
To create a new reference note:

1. Click the check box to the left of each note you want to reference.



New note with HTML of referenced note

2. Select **New Reference Note** from the **Do Action** drop-down list.
3. A new note is created with the selected notes inserted as a reference in the **Content** field. Complete the creation of the new note.



New reference note in write mode

4. Click **Close and Contribute**.

The referenced note appears in the view you selected from the **in view** drop-down list.

Note: See section 3.5.4 to learn more about copying an object to a view.

11.7 COPYING OBJECTS TO A VIEW

You can copy objects from My Reader to a view.

To copy objects to a view:

1. Click the check box to the left of each object you want to copy.
2. Select a view under *Copy To View* from the **Do Action** drop-down list.

The view you copied the objects to appears.



12 AUTHOR LIST

12.1 INTRODUCTION TO THE AUTHOR LIST

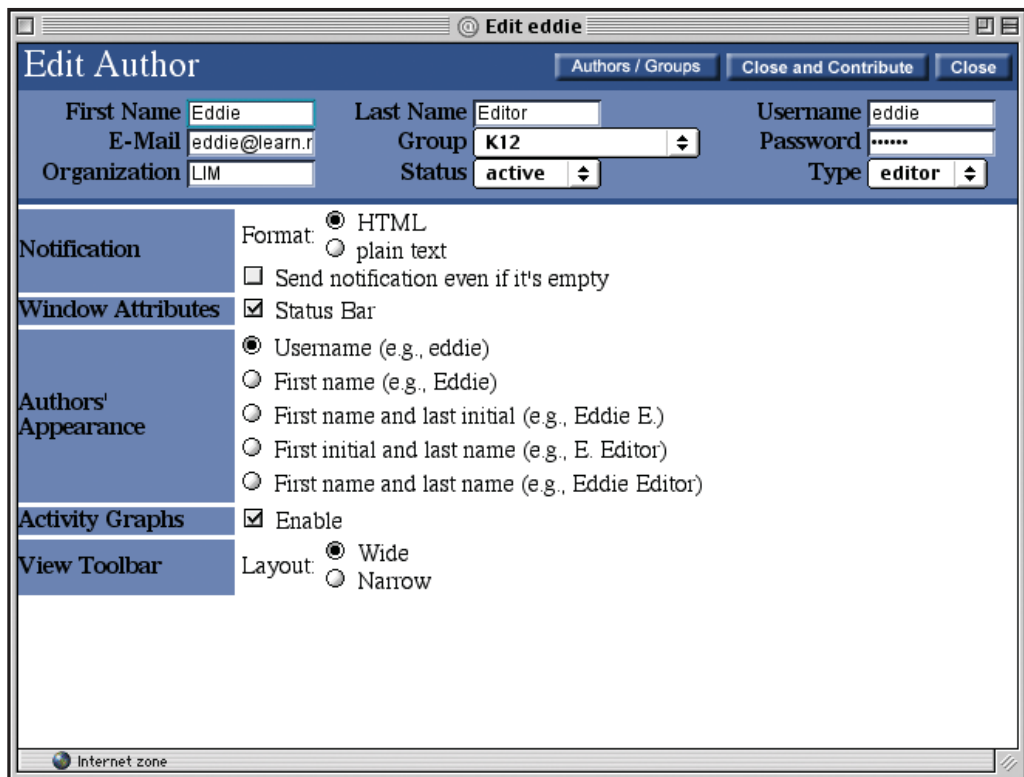
The Author List window lists all authors and groups. Readers, visitors, and writers can view the listings and edit some of their own author information from the Authors List. Editors and managers can create and edit groups and authors. They can also set up groups for self registration.

12.2 ACCESSING THE AUTHOR LIST

You can access the Author List from any view by using the **Edit Authors** button on the toolbar. Before accessing the Author List window, the Edit Author window will appear, allowing you to make changes to your own author information.

To access the Author List window:

1. Click . The Edit Author window appears.



The screenshot shows the 'Edit Author' window for user 'eddie'. The window title is 'Edit eddie'. It contains several sections:

- Personal Information:** First Name (Eddie), Last Name (Editor), Username (eddie), E-Mail (eddie@learn.r), Group (K12), Password (masked), Organization (LIM), Status (active), Type (editor).
- Notification:** Format (HTML selected, plain text unselected), Send notification even if it's empty (unchecked).
- Window Attributes:** Status Bar (checked).
- Authors' Appearance:** Username (e.g., eddie) selected, First name (e.g., Eddie), First name and last initial (e.g., Eddie E.), First initial and last name (e.g., E. Editor), First name and last name (e.g., Eddie Editor).
- Activity Graphs:** Enable (checked).
- View Toolbar:** Layout (Wide selected, Narrow unselected).

Buttons at the top right: Authors / Groups, Close and Contribute, Close.

Edit Author window

2. Click .

12 AUTHOR LIST

The Author List window opens. The Author List contains a list of users, called the All Authors list, and a list of groups, called the All Groups list. The Author List for editors and managers also includes the **Add Author** section where they can add users. At the bottom of the window, editors and managers can see the Registration Codes list where they can set up self registration.

Tip: You can use the Jump To links to move within the Author List.

Jump To links

Add Author section

All Authors list

Note: The Author List may appear different to you depending on your user type.

First Name	Last Name	Username	Group	Type	E-Mail
		JoAnn	University	writer	edit delete
		andy1	K12	writer	edit delete
		joe	K12	writer	edit delete
Alan	Alan	Alan	Flight Class	writer	edit delete
Ali	Ali	Ali	Flight Class	writer	edit delete
Ally	Ally	Ally	Period 1	writer	edit delete
andrew	andrew	andrew	Sample Group	writer	edit delete
Angelo	Angelo	Angelo	Medical Group	writer	edit delete
anonymous	anonymous	anonymous	Sample Group	reader	edit delete

Author List window

To close the Author List window:

- Click .

12.3 AUTHOR LIST FOR ALL USERS

Note: See section 12.4 to learn more about the additional functions editors and managers can perform.

Readers, visitors, and writers can edit their own author information, sort authors, view additional author information, and view groups. Editors and managers can perform these functions as well as others.

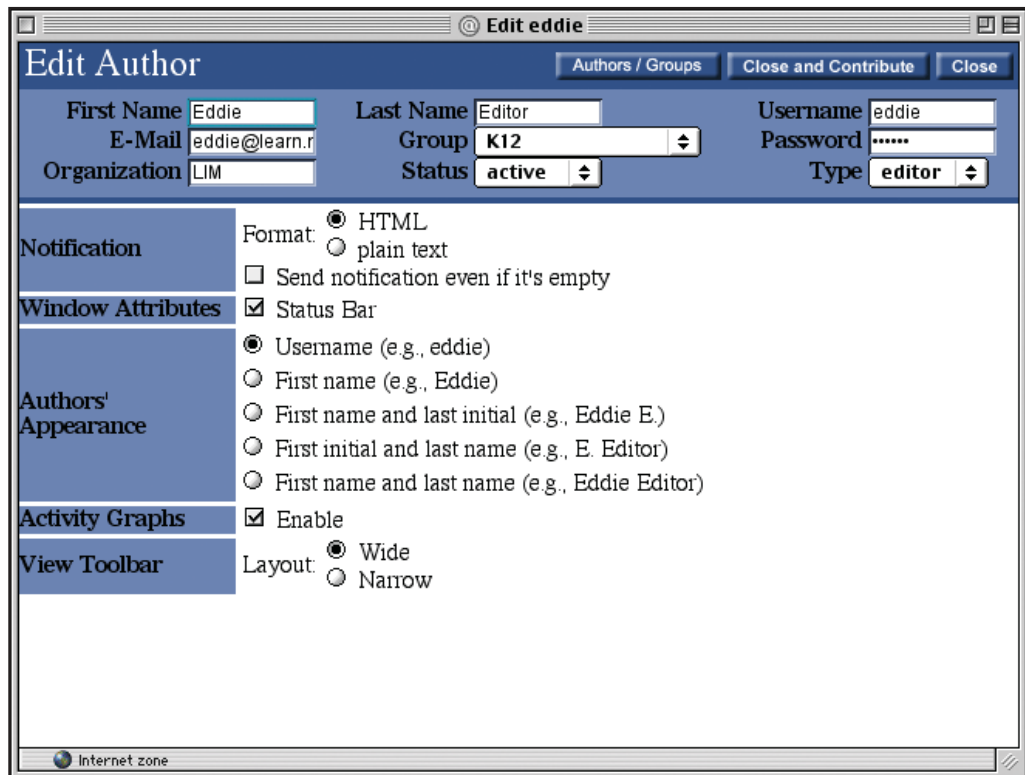
12.3.1 EDITING AUTHOR INFORMATION

You edit author information from the Edit Author window. The Edit Author window can be accessed from a view or from the Author List window.

EDITING AUTHOR INFORMATION WHEN ACCESSING THE EDIT AUTHOR WINDOW FROM A VIEW

You can edit your author information when you first enter the Author List. The Edit Author window appears when you click the **Authors** button on a view.

All users can edit their first name, last name, username, e-mail, password, and organization. They can also set their notification preferences, authors' appearance format, toolbar layout, as well as enable the status bar and the Activity graphs. Editors and managers can also edit their author's group, status, and type.



The screenshot shows a web browser window titled "Edit eddie" with a sub-header "Edit Author". The window contains several input fields and sections:

- Personal Information:** First Name (Eddie), Last Name (Editor), Username (eddie), E-Mail (eddie@learn.r), Group (K12), Password (masked with dots), Organization (LIM), Status (active), and Type (editor).
- Notification:** Format (HTML selected, plain text unselected), and a checkbox for "Send notification even if it's empty" (unchecked).
- Window Attributes:** A checkbox for "Status Bar" (checked).
- Authors' Appearance:** Radio buttons for "Username (e.g., eddie)", "First name (e.g., Eddie)", "First name and last initial (e.g., Eddie E.)", "First initial and last name (e.g., E. Editor)", and "First name and last name (e.g., Eddie Editor)".
- Activity Graphs:** A checkbox for "Enable" (checked).
- View Toolbar:** Radio buttons for "Wide" (selected) and "Narrow".

At the bottom of the window, there is a status bar with the text "Internet zone".

Edit Author window accessed from a view

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The elements of the Edit Author window are described in the following tables. The first table describes the basic user fields.

Field	Description
First Name	User's first name. This is a required field.
Last Name	User's last name. This is a required field.
Username	User's log on name. Allows access to the knowledge base.
E-Mail	User's e-mail address.
Group	Group user belongs to. Can only be changed by editors and managers.
Password	User's log on password. Allows access to the knowledge base. Displayed as hidden text.
Organization	Additional field for identification and sorting.
Status	Choices are <i>active</i> or <i>deleted</i> . Active users can use the knowledge base. Deleted users cannot. Can only be changed by editors and managers.
Type	User type. Determines user permission level in Knowledge Forum. Can only be changed by editors and managers.

12 AUTHOR LIST

Note: See section 12.4.1 to learn more about adding groups.

The second table describes the elements of the Edit Author window that are initially set by editors or managers when they create a group and can later be personalized by users.

Note: See section 10.6 to learn more about setting up notifications.

Element	Description
Notification	You can set your notification e-mails to be sent in HTML or plain text format. You can also have notification e-mails sent even if a search turns up no objects. These are global settings, impacting all of your notifications. They can also be set in the New Notification and Edit Notification windows.
Window Attributes	You can enable the status bar at the bottom of every window. See the example of the status bar below.
Authors' Appearance	You can determine how object authors will appear to you in Knowledge Forum. The choices are by username, first name, first name and last initial, first initial and last name, and first name and last name.
Activity Graphs	You can enable the Show Graph check box in all views and the View List.
View Toolbar	You can set the toolbar to display in a wide or narrow format.

Note: See section 3.5.5 or 9.3.5 to learn more about the Activity graph.


Status bar




Status bar at the bottom of a window


To edit author information from a view:



1. Click . The Edit Author window appears.
2. Edit the first name in the **First** field if needed.
3. Edit the last name in the **Last** field if needed.
4. Edit the username in the **Username** field if needed.
5. Edit the e-mail address in the **E-Mail** field if needed.
6. Select a group from the **Group** drop-down list if needed (available to editors and managers only).

12 AUTHOR LIST

7. Edit the password in the **Password** field if needed.
8. Edit the organization in the **Organization** field if needed.
9. Select a status from the **Status** drop-down list if needed (available to editors and managers only).
10. Select a user type from the **Type** drop-down list if needed (available to editors and managers only).
11. Select HTML or plain text format from the **Notification** section.
12. Check the **Send notification even if it's empty** check box (optional).
13. Check the **Status Bar** check box to enable the status bar (optional).
14. Select an author display format from the **Authors' Appearance** section.
15. Check the **Enable** check box in the **Activity Graphs** section to make the **Show Graph** check box available on views and the View List (optional).
16. Select the wide or narrow layout option from the **View Toolbar** section.
- 17a. Click  to return to the view.

Or
- 17b. Confirm your changes and continue to the Author List.
 - i. Click . A confirmation window appears.



Confirmation window

- ii. Click . The Author List appears.

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EDITING AUTHOR INFORMATION WHEN ACCESSING THE EDIT AUTHOR WINDOW FROM THE AUTHOR LIST WINDOW

From the Author List window, you can also edit author information for those listings with an *edit* link next to them. For readers, visitors, and writers, that means they can edit their own author information. Editors and managers can edit information for all authors, however, they cannot edit the **Notification, Window Attributes, Authors' Appearance, Activity Graphs, and View Toolbar** sections when editing other users.

randy K12 writer randy@learn.motion.com [edit](#)
Edit link

To edit your author information from the Author List window:

1. Click the *edit* link to the right of the your listing in the All Authors list. The Edit Author window appears.

The screenshot shows a window titled "Edit Author" for user "randy". The window has a blue header with "Close and Contribute" and "Close" buttons. Below the header, there are several input fields for author information: First Name (Randy), Last Name (Writer), Username (randy), E-Mail (randy@learn.r), Group (K12), Password (masked with dots), Organization (LIM), and Status (active). Below these fields are several sections with checkboxes and radio buttons: "Notification" (Format: HTML selected, plain text; Send notification even if it's empty), "Window Attributes" (Status Bar), "Authors' Appearance" (User name, First name, First name and last initial selected, First initial and last name, First name and last name), "Activity Graphs" (Enable), and "View Toolbar" (Layout: Wide selected, Narrow).

Edit Author window accessed from the Author List window

2. Edit the author information as needed.
3. Click **Close and Contribute**.

Knowledge Forum updates the author listing on the All Authors list.

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CANCEL EDITING AUTHOR INFORMATION

To cancel editing author information from the Edit Author window:

- Click .

12.3.2 SORTING AUTHORS

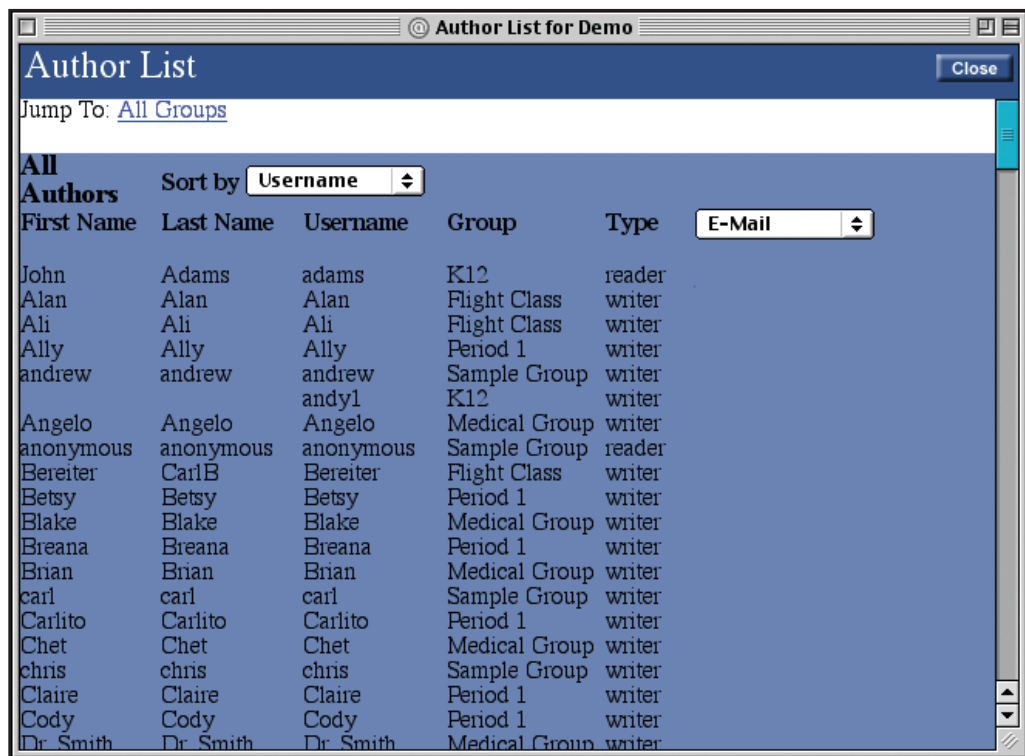
Readers, visitors, and writers can sort authors in the All Authors list by first name, last name, username, group, type, e-mail, organization, or status. Editors and managers can also sort by password and last login. By default, authors are initially sorted by first name.

To sort authors in the All Authors list:

- Select the sort method from the **Sort by** drop-down list.

Knowledge Forum sorts the All Authors list by the selected sort method.

Tip: You can send an e-mail to an author by clicking his or her e-mail address in the All Authors list.



Sorting All Authors list

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12.3.3 VIEWING ADDITIONAL AUTHOR INFORMATION

The All Authors list contains five column headers of author attributes (first name, last name, username, group, and type) and one additional author information column header. The additional author information column header allows users to choose which type of additional author information they want to display. Readers, visitors, and writers can list authors' e-mail address, organization, or status. Editors and managers can also select *Password* and *Last Login*. By default, the initial column header is *E-Mail*.

To select the additional author information column header:

- Select column header from the column header drop-down list.

Knowledge Forum displays the selected attribute in the All Authors list.



Author List					
Jump To: All Groups					
All Authors		Sort by	Username		
First Name	Last Name	Username	Group	Type	Status
John	Adams	adams	K12	reader	active
Alan	Alan	Alan	Flight Class	writer	active
Ali	Ali	Ali	Flight Class	writer	active
Ally	Ally	Ally	Period 1	writer	active
andrew	andrew	andrew	Sample Group	writer	active
		andy1	K12	writer	active
Angelo	Angelo	Angelo	Medical Group	writer	active
anonymous	anonymous	anonymous	Sample Group	reader	active
Bereiter	CarlB	Bereiter	Flight Class	writer	active
Betsy	Betsy	Betsy	Period 1	writer	active
Blake	Blake	Blake	Medical Group	writer	active
Breana	Breana	Breana	Period 1	writer	active
Brian	Brian	Brian	Medical Group	writer	active
carl	carl	carl	Sample Group	writer	active
Carlito	Carlito	Carlito	Period 1	writer	active
Chet	Chet	Chet	Medical Group	writer	active
chris	chris	chris	Sample Group	writer	active
Claire	Claire	Claire	Period 1	writer	active
Cody	Cody	Cody	Period 1	writer	active
Dr. Smith	Dr. Smith	Dr. Smith	Medical Group	writer	active
Edie	Editor	eddie	K12	editor	active

Selecting additional author information

Note: See section 12.4.1 to learn more about adding groups and section 12.4.2 to learn more about editing groups.

12.3.4 VIEWING THE ALL GROUPS LIST

Readers, visitors, and writers can view the All Groups list, but they may not make any changes to it. The All Groups list contains a list of group names, the number of authors for each group, and their home views. Editors and managers can add and edit groups.

Group Name	Authors	Home View
Biovista	9	About Knowledge Forum
Flight Class	12	Science: Flight of Airplanes
guests	11	About Knowledge Forum
K12	8	Welcome To Knowledge Forum
Media	2	Welcome To Knowledge Forum
Medical Group	12	University Examples
NECC	0	Welcome To Knowledge Forum
NECC Visitor	0	Welcome To Knowledge Forum
Nunavut	5	Welcome To Knowledge Forum
Period 1	40	Social Studies: North vs South
Presentation Tour	28	Tours for Presentation
Sample Group	26	Welcome To Knowledge Forum
University	1	Welcome To Knowledge Forum

All Groups list

12.4 AUTHOR LIST FOR EDITORS AND MANAGERS

Note: Managers added by an administrator will not be assigned to a specific group. Managers can assign themselves (or other managers) to a group from the Edit Author window. See section 12.4.4 to learn more about editing users.

Editors and managers can add and edit groups and authors in addition to performing the functions of readers, visitors, and writers. They can also inactivate users and create a special reader that allows users to access the Knowledge Forum externally. Plus, they can create registration codes to allow for self registration.

As an editor or manager, when you establish a new knowledge base, you should go to the Author List and do the following:

- Set up at least one group name for your authors.
- Select the home view, scaffold, and writers' restrictions for the group.
- Add writers and editors to the group.

Knowledge Forum provides a default group called *Sample Group*. The default username is *manager* and the default password is *build*. You can change the settings for this group, add users to it, or create a new group.

12.4.1 ADDING A GROUP

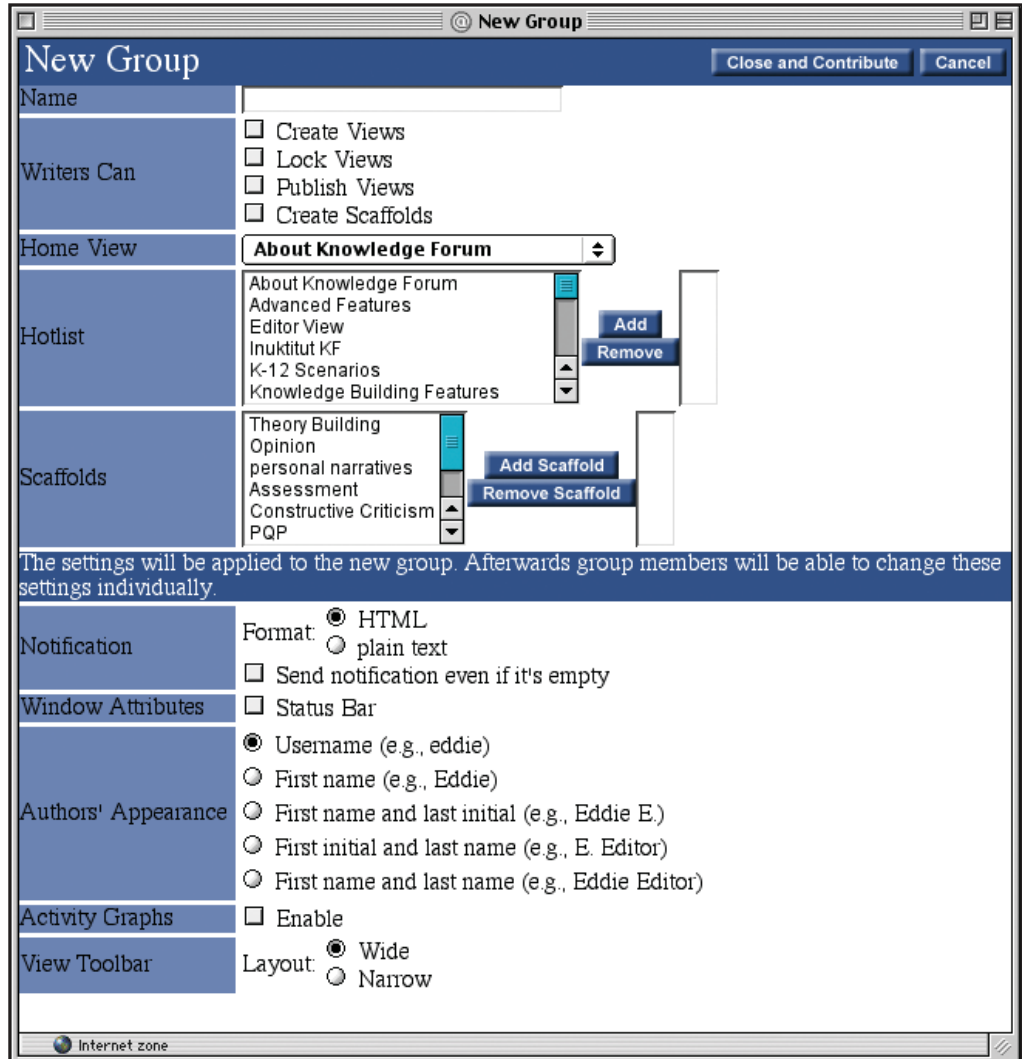
Editors and managers will see a [New Group](#) link in the All Groups list. You can use this link to access the New Group window and create a new group.

All Groups [New Group](#)

[New Group link](#)

Tip: Use the [All Groups](#) link at the top of the Author List window to jump to the All Groups list.

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New Group window

12 AUTHOR LIST

While all of the settings are applied to the new group, some of them can be later personalized by each group member. The following table describes the elements of the New Group window that individual group members cannot personalize.

Group Feature	Description
Name	You can type the name of the group.
Create Views	You can click the check box to allow writers to create their own views. Makes the New View button available on the View List.
Lock Views	You can click the check box to allow writers to lock their views, prohibiting other users (excluding editors and managers) from adding Knowledge Forum objects or making any other changes to the views.
Publish Views	You can click the check box to allow writers to publish their views. Lets writers publish a view when setting the permissions option on the New View window. A published view can be seen by readers and visitors, and visitors may add to it.
Create Scaffolds	You can click the check box to allow writers to create their own scaffolds. Makes the Create A New Scaffold link on the Scaffolds window visible.
Home View	You can assign each group its own home view by choosing from all available views in the Home View drop-down list. The home view is the first view users see when they enter Knowledge Forum.
Hotlist	You can select certain views to appear in the Group Hotlist section of My Hotlist for every author of the group.
Scaffolds	You can determine the scaffolds available to authors in a group when they create notes.


Note: See section 4.3 to learn more about creating a note. See section 9.3.3 to learn more about My Hotlist. See section 9.4 to learn more about creating views, locking views, publishing views, and assigning scaffolds to views. See chapter 13 to learn more about creating scaffolds.

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The following table describes the elements of the New Group window that can be personalized by individual group members in their Edit Author window.

Group Feature	Description
Notification	You can set the group's notification e-mails to be sent in HTML or plain text format. You can also have notification e-mails sent even if a search turns up no objects. These are global settings, impacting all of the author's notifications. By default, HTML format is selected and the Send notification even if it's empty check box is unchecked.
Window Attributes	You can enable the status bar at the bottom of every window. By default, this setting is unchecked.
Authors' Appearance	You can determine how object authors will appear for group members. The choices are by username, first name, first name and last initial, first initial and last name, and first name and last name. By default, <i>Username</i> is selected.
Activity Graphs	You can enable the Show Graph check box in all views and the View List for the group. By default, this setting is unchecked.
View Toolbar	You can set the toolbar to display in a wide or narrow format. By default, the wide format is selected.

To add a group:

1. Click the [New Group](#) link at the top of the All Groups list. The New Group window appears.
2. Type the group name in the **Name** field.
3. Set the **Writers Can** options by clicking the appropriate check boxes.
4. Select the home view from the **Home View** drop-down list.
5. Select a hotlist view from the **Hotlist** list box.
6. Click .
7. Repeat steps 5 and 6 until all the hotlist views you want are added to the **Hotlist** list box on the right.

12 AUTHOR LIST

8. Select available scaffolds from the **Scaffolds** list box.
9. Click **Add Scaffold**.
10. Repeat steps 8 and 9 until all the scaffolds you want are added to the **Scaffolds** list box on the right.
11. Select HTML or plain text format from the **Notification** section.
12. Check the **Send notification even if it's empty** check box (optional).
13. Check the **Status Bar** check box to enable the status bar (optional).
14. Select an author display format from the **Authors' Appearance** section.
15. Check the **Enable** check box in the **Activity Graphs** section to make the **Show Graph** check box available on views and the View List (optional).
16. Select the wide or narrow layout option from the **View Toolbar** section.
17. Click **Close and Contribute**.

Knowledge Forum adds the group to the All Groups list.

Group Name	Authors	Home View	
Biovista	9	About Knowledge Forum	edit
Flight Class	12	Science: Flight of Airplanes	edit
guests	11	About Knowledge Forum	edit
K12	8	Welcome To Knowledge Forum	edit
Media	2	Welcome To Knowledge Forum	edit
Medical Group	12	University Examples	edit
NECC	0	Welcome To Knowledge Forum	edit
NECC Visitor	0	Welcome To Knowledge Forum	edit
Nunavut	5	Welcome To Knowledge Forum	edit
Period 1	40	Social Studies: North vs South	edit
Presentation Tour	28	Tours for Presentation	edit
Sample Group	26	Welcome To Knowledge Forum	edit
University	1	Welcome To Knowledge Forum	edit

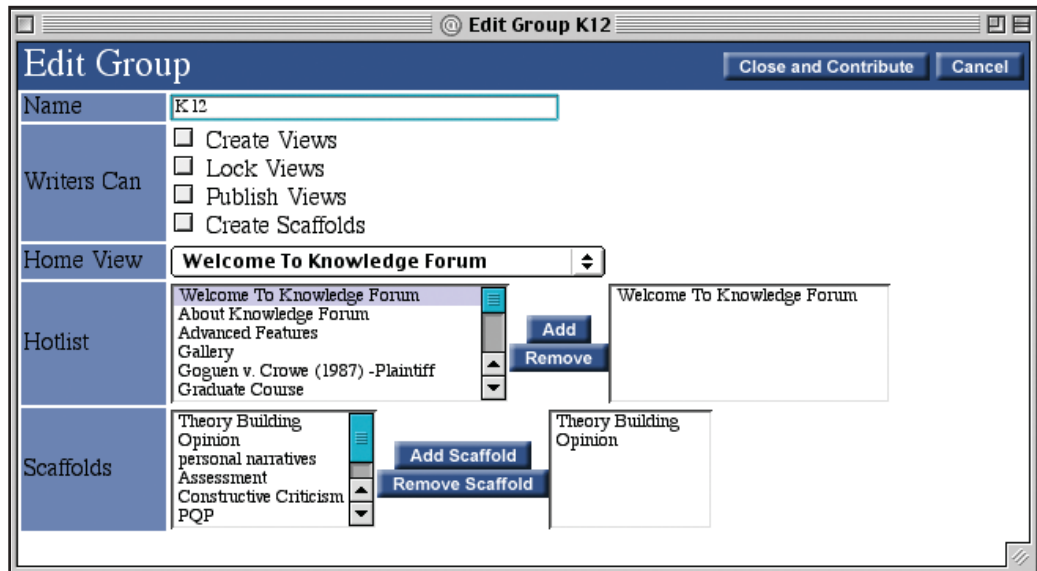
All Groups list

To cancel a new group before contributing:

- Click **Cancel**.

12.4.2 EDITING A GROUP

Editors and managers can edit group settings in the Edit Group window. When editing a group, the **Notification**, **Window Attributes**, **Author Display**, **Activity Graphs**, and **View Sidebar** sections will not appear on the Edit Group window.



Edit Group window

To edit a group:

1. Click the *edit* link to the right of the group's listing in the All Groups list. The Edit Group window appears.
2. Edit the group information as needed.
3. Click **Close and Contribute**.

You can remove a view from the **Hotlist** list box. Perform the following steps before clicking the **Close and Contribute** button when editing the group settings.

To remove a view from the group hotlist:

1. Select view from the **Hotlist** list box on the right.
2. Click **Remove**.

You can remove a scaffold from the **Scaffolds** list box. Perform the following steps before clicking the **Close and Contribute** button when editing the group settings.

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To remove a scaffold:

1. Select scaffold from the **Scaffolds** list box on the right.
2. Click **Remove Scaffold**.

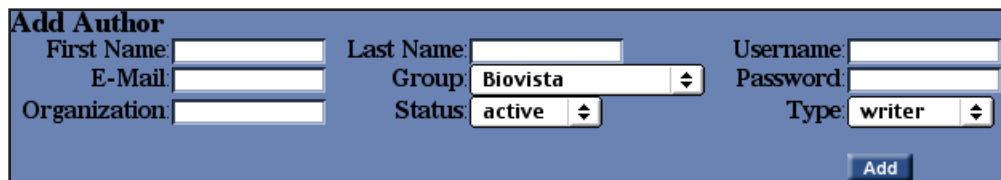
To cancel edits to a group before contributing:

- Click **Cancel**.

12.4.3 ADDING USERS

Editors and managers can add users to a group in the **Add Author** section of the Author List.

Note: See section 12.3.1 to learn more about these settings.



Add Author		
First Name: <input type="text"/>	Last Name: <input type="text"/>	Username: <input type="text"/>
E-Mail: <input type="text"/>	Group: <input type="text" value="Biovista"/>	Password: <input type="text"/>
Organization: <input type="text"/>	Status: <input type="text" value="active"/>	Type: <input type="text" value="writer"/>
Add		

Add Author section

To add a user:

1. Go to the **Add Author** section of the Author List.
2. Type the first name in the **First** field.
3. Type the last name in the **Last** field.
4. Type the username in the **Username** field.
5. Type the e-mail address in the **E-Mail** field.
6. Select a group from the **Group** drop-down list.
7. Type the password in the **Password** field.
8. Type the organization in the **Organization** field.
9. Select user type from the **Type** drop-down list.
10. Click **Add**.

Knowledge Forum adds the user to the All Authors list.

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Note: See section 2.3 to learn more about user types.

Assigning a user a type determines what he or she can do in Knowledge Forum. The five user types have different viewing and editing privileges.

Task	Reader	Visitor	Writer	Editor	Manager
View published views	yes	yes	yes	yes	yes
View unpublished views	no	no	yes	yes	yes
View editor views	no	no	no	yes	yes
View private views	no	no	own	own	yes
Create notes	no	yes	yes	yes	yes
Edit notes	no	own	own	yes	yes
Create views	no	no	maybe*	yes	yes
Create editor views	no	no	no	yes	yes
Create private views	no	no	maybe*	yes	yes
Edit views	no	no	own	yes	yes
Create scaffolds	no	no	maybe*	yes	yes
Lock/unlock views	no	no	maybe*	yes	yes
Publish views	no	no	maybe*	yes	yes
Add groups	no	no	no	yes	yes
Add users	no	no	no	yes**	yes
Create self-registration codes	no	no	no	yes	yes
Edit self-registration codes	no	no	no	yes***	yes

Note: * Editors or managers must grant a group's writers permission to perform some tasks. See section 12.4.1 to learn more about adding a group.

Note: ** Editors can add all user types except for managers.

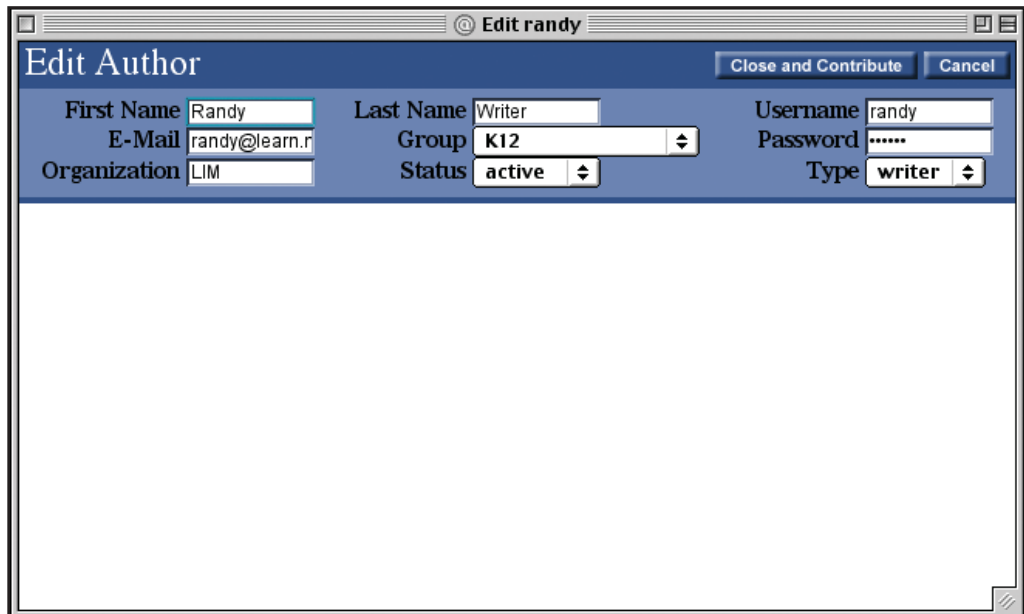
Note: *** Editors can only view and edit self-registration codes that they created.

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12.4.4 EDITING USERS

Note: Managers added by an administrator will not be assigned to a specific group. Managers can assign themselves (or other managers) to a group from the Edit Author window.

Editors and managers can edit other users' information in the Edit Author window. However, unlike when editing their own author information, the **Notification, Window Attributes, Authors' Appearance, Activity Graphs,** and **View Toolbar** sections cannot be edited and will not appear on the Edit Author window.



The screenshot shows a web browser window titled "Edit Author" for user "randy". The window contains a form with the following fields:

First Name	Randy	Last Name	Writer	Username	randy
E-Mail	randy@learn.r	Group	K12	Password
Organization	LIM	Status	active	Type	writer

Buttons for "Close and Contribute" and "Cancel" are visible in the top right corner.

Edit Author window for another user

To edit a user:

1. Click the *edit* link to the right of the author's listing in the All Authors list. The Edit Author window appears.
2. Edit the author information as needed.
3. Click **Close and Contribute**.

Knowledge Forum updates the user listing on the All Authors list.

To cancel editing author information:

- Click **Cancel**.

12.4.5 IMPORTING AUTHORS

Editors and managers can add several authors at once by using the [Import Authors](#) link. This feature allows editors and managers to upload a comma-delimited file containing a list of authors. For example, you can generate a .csv file of authors to upload to Knowledge Forum from Microsoft Excel or a text-only file from Microsoft Word. The file can contain the following items:

Column Header	Stands for the Author's...
unam	username (cannot match another username in the file or an existing username in the database)
fnam	first name (if left blank, it will be the same as the username)
lnam	last name (if left blank, it will be the same as the username)
emai	e-mail address
orga	organization
type	user type (must be a valid user type, editor and below)
pass	password (if left blank, it will be the same as the username)

The *unam* column header is required and must be listed first. The rest of the column headers are optional and can be listed in any order. However, you will receive an error message if you use an incorrect column header name. Aside from the username, you do not need to include every item beneath the header column.

List *unam* and usernames first

Column headers

Subsequent rows

```
unam,fnam,lnam,emai,orga,type,pass
truman,Scott,Truman,struman@class.com,Room 10,writer,student1
bucher,Erin,Bucher,ebucher@class.com,Room10,reader,student2
toes,Gwen,Toes,gtoes@class.com,Room10,visitor,student3
pmarcos,Pam,Marcos,,Room 10,,student4
```

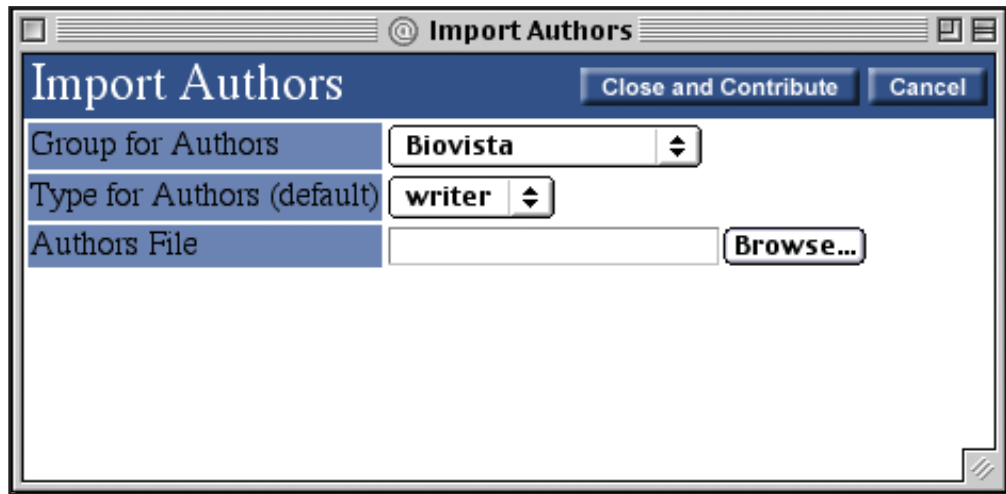
Inside a .csv file

You can leave a field blank

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To import authors from the Author List:

1. Click the [Import Authors](#) link. The Import Authors window appears.



Import Authors window

2. Select a group from the **Group For Authors** drop-down list.
3. Select a default author type from the **Type for Authors (default)** drop-down list.
4. Click **Browse...**. The Open window appears.
5. Select the file to upload.
6. Click **Open**. The file name is added to the **Authors File** field of the Import Authors window.
7. Click **Close and Contribute**.

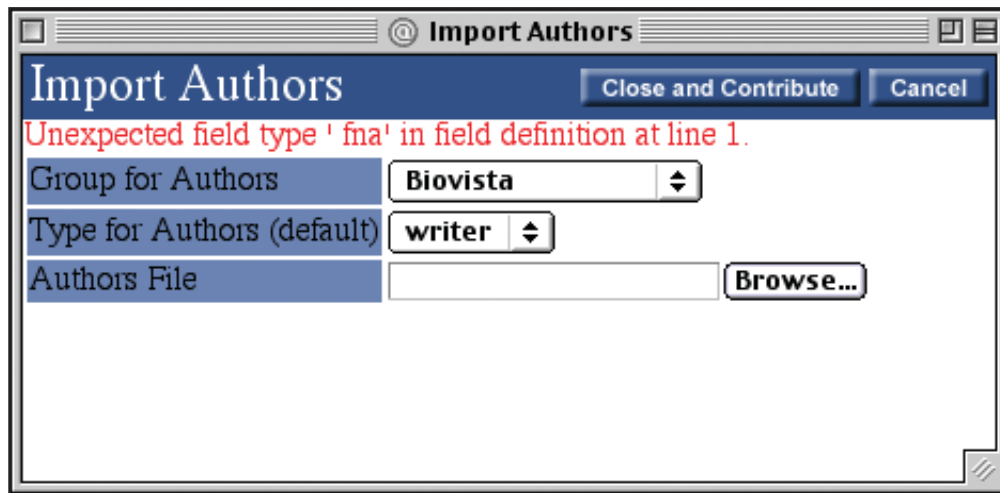
An upload window shows the progress of the file being uploaded to the server. Once the file is uploaded, the authors are added to the All Authors list.

Scott	Truman	truman	Group X	writer	struman@class.com
Erin	Buchi	buchi	Group X	reader	ebuchi@class.com
Gwen	Toes	toes	Group X	visitor	gtoes@class.com
Pam	Marcos	pmarcos	Group X	writer	

Author List

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If there is a problem with your file, an error message will appear on the Import Authors window describing what the problem is. You can fix your file and try again.



Error message

12.4.6 INACTIVATING USERS

Editors and managers can inactivate users. Inactive users will still be listed on the All Authors list, but they will have a status of *deleted*.

To inactivate users (two options):

Option 1

- Click the *delete* link to the right of the author's listings in the All Authors list.

Option 2

1. Click the *edit* link to the right of the author's listing in the All Authors list. The Edit Author window appears.
2. Select **Delete** from the **Status** drop-down list.
3. Click **Close and Contribute**.

The user's status changes to *deleted*. You can reactivate a user by changing the status back to *active*.

12.4.7 CREATING THE ANONYMOUS READER

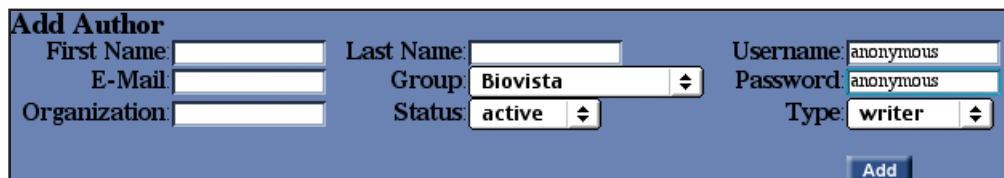
Editors and managers can create a special reader that allows other users to access one database from another without logging on to the second database. As a reader, users can go to published views and read notes.

In order to set up the special reader, an editor or manager must create an anonymous reader, and a user must create an external link and place it in another database. A user from the other database can then use the external link to enter the original database.

To create the anonymous reader:

1. Go to the **Add Author** section of the Author List.
2. Type *anonymous* in the **Username** field.
3. Type *anonymous* in the **Password** field.

Note: You must type *anonymous* in lower case in the **Username** and **Password** fields.



Add Author		
First Name:	<input type="text"/>	Last Name: <input type="text"/>
E-Mail:	<input type="text"/>	Group: <input type="text" value="Biovista"/>
Organization: <input type="text"/>	Status: <input type="text" value="active"/>	Username: <input type="text" value="anonymous"/>
		Password: <input type="text" value="anonymous"/>
		Type: <input type="text" value="writer"/>
<input type="button" value="Add"/>		

Adding anonymous reader

4. Click .

Knowledge Forum adds the anonymous reader to the All Authors list.

To create an external link from a published view or a note from a published view for the anonymous reader to enter:


- 1a. Click and hold the View URL for external use or Note URL for external use link (Macintosh).
- Or
- 1b. Left-mouse click the View URL for external use or Note URL for external use link (Windows).
2. Select **Copy Link to Clipboard** (Internet Explorer) or **Copy this Link Location** (Netscape).

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Copy Link to Clipboard (Internet Explorer) selected



3. Click . The “Welcome to Knowledge Forum” window appears.
4. Select the database you want users to be able to log on from, from the **Database** drop-down list.
5. Log on to the database.
6. Select the note you want to place the external link in.
7. Click the *edit* link to open the note in write mode.
8. Paste the external link in the **Content** field.

Note: The user placing the external link into the second database must have a valid username and password to enter that database.

Tip: To paste the external link, use **COMMAND-V** (Macintosh) or **CTRL-V** (Windows).



External link pasted

9. Click .

Knowledge Forum saves the note with the link to the view or note from the other database. You can then use external link from the note in read mode to enter the other database.

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To enter as an anonymous reader using an external link:

1. Locate the note where the external link was placed.

External link pasted below:

<http://eric2.motion.com:8080/notelink?DB=Demo&ViewID=31>

External link

2. Click the external link.

The note or view from the other database opens.

Note: See section 2.1.2 to learn more about self registration.

Tip: You can use the [Registration Codes](#) link to jump to the Registration Codes list.

12.4.8 CREATING REGISTRATION CODES

Editors and managers can set up self registration for a group of users. Self registration allows users to log on and create their own username and password. Editors and managers can create a registration code that users must enter in order to self register.

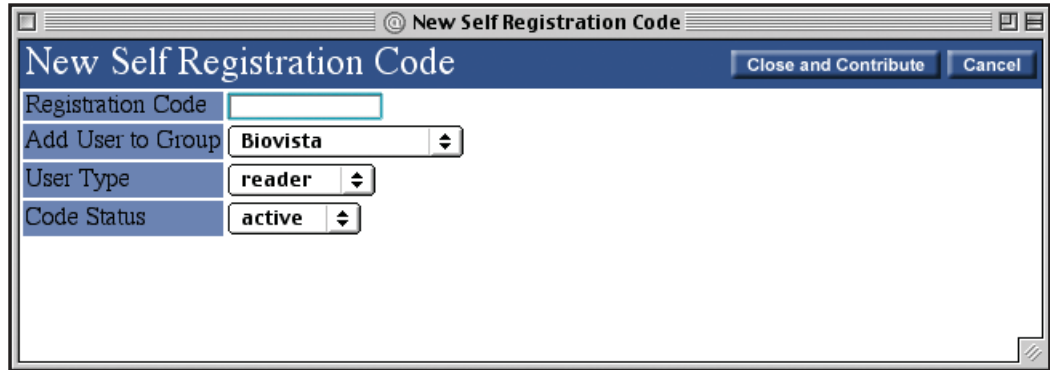
At the bottom of the Author List window is the Registration Codes list. The Registration Codes list shows the registration codes, user types, groups, and status of each code.

Code	User Type	Group	Status	
NECC	visitor	NECC Visitor	deleted	edit
Media	visitor	Media	deleted	edit
K12	writer	K12	active	edit
University	writer	University	active	edit

Registration Codes list

To create a new registration code:

1. Click the [New Registration Code](#) link. The New Self Registration Code window appears.



New Self Registration Code window

2. Type the registration code in the **Registration Code** field.
3. Select the group from the **Add User to Group** drop-down list.
4. Select the user type from the **User Type** drop-down list.
5. Select the code status from the **Code Status** drop-down list. The default is *active*.
6. Click **Close and Contribute**.

Knowledge Forum adds the new registration code to the Registration Code list. Managers or editors must provide users the registration code so they can self register.

To cancel the creation of a registration code before contributing:

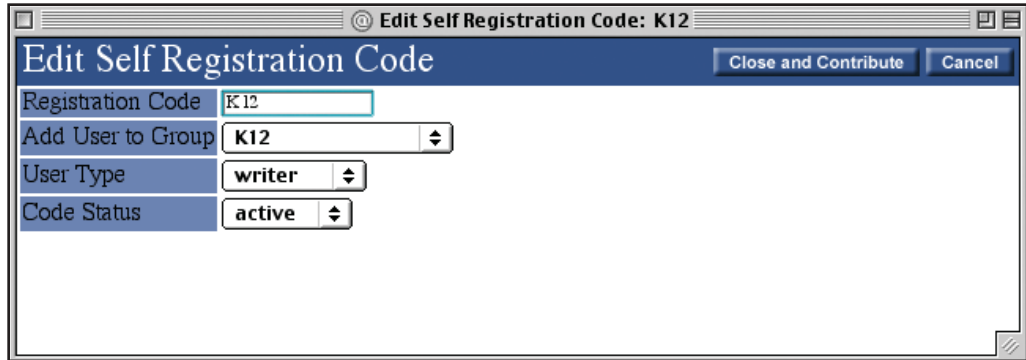
- Click **Cancel**.

Editors and managers can also edit registration codes from the Registration Codes list. Editors can only edit registration codes that they created. Managers can edit all registration codes.

To edit a registration code:

1. Click the *edit* link to the right of the code you want to edit. The Edit Registration Code window appears.

12 AUTHOR LIST



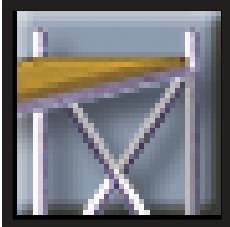
Edit Self Registration Code window

2. Edit the fields as needed.
3. Click **Close and Contribute**.

Changing the **Code Status** field to *deleted* makes the registration code inactive.

To cancel editing registration code information before contributing:

- Click **Cancel**.



13 SCAFFOLDS

13.1 INTRODUCTION TO SCAFFOLDS

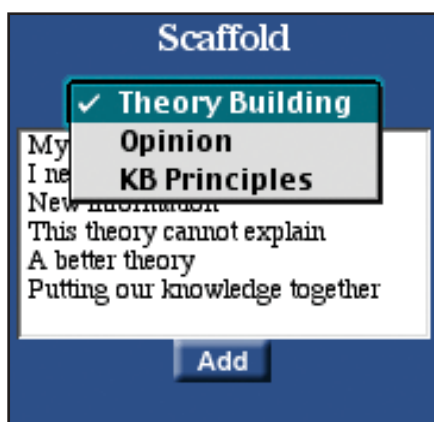
Scaffolds help you clarify and organize the writing of your concepts in a note. A scaffold consists of a series of supports that writers can insert into the content of their note. Writers then enter content in response to the support.

Note: See section 12.4.1 to learn more about granting writers the ability to create scaffolds and determining the scaffolds available for a group. See section 9.4 to learn more about determining the scaffolds available for a specific view. See section 4.3.1 to learn more about using scaffolds in a note.

Editors and managers can create and edit scaffolds from the Scaffolds window. Writers can create and edit scaffolds if granted permission to do so from an editor or manager. Editors and managers then associate scaffolds with groups and specific views, making the scaffolds available to authors when they create notes.

When an editor or manager creates or edits a group, scaffolds can be made available to group member when they create a note. Any note created by a member of the group can use the assigned scaffold.

When an author creates or edits a view, they can assign scaffolds to it. Such scaffolds are available to any user creating a new note from that view.



Available scaffolds in a note

13.2 ACCESSING THE SCAFFOLDS WINDOW

You can access the Scaffolds window from any view by using the **Scaffolds** button on the toolbar.

To access the Scaffolds window:

- Click .

The Scaffolds window opens, listing each scaffold, its supports, and each group and view associated with the scaffold.

Note: Only editors, managers, and writers from groups with permission to create scaffolds will see the [Create A New Scaffold](#) and [edit](#) links.

Scaffold	Supports	Groups	Views
Theory Building edit	My theory I need to understand New information This theory cannot explain A better theory Putting our knowledge together	Biovista guests Period 1 Sample Group Flight Class Presentation Tour K12 University	Welcome To Knowledge Forum Social Studies: North vs South
Opinion edit	Opinion Different opinion Reason Elaboration Evidence Example Conclusion	Biovista guests Sample Group Flight Class K12 University	Welcome To Knowledge Forum
personal narratives edit	It is important because I wrote about this because My personal narrative	Period 1	
	Research Anatomical Accuracy		

Scaffolds window

To close the Scaffolds window:

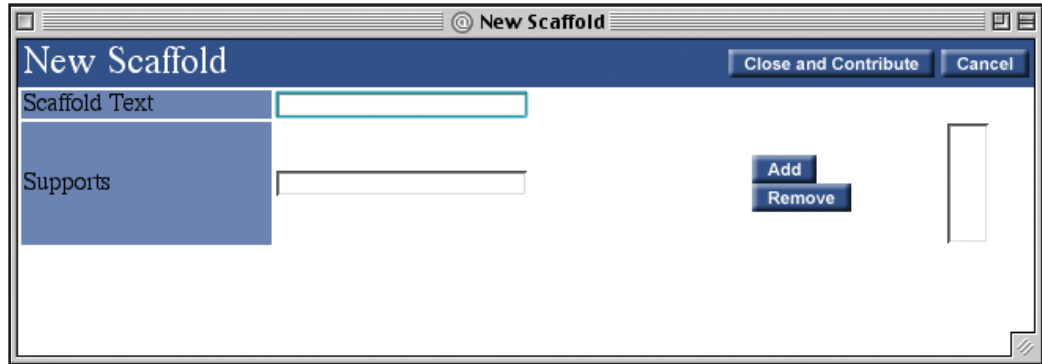
- Click [Close](#).

13.3 CREATING A SCAFFOLD

Editors, managers, and writers (who have permission) can create a new scaffold and its supports from the Scaffolds window.

To create a scaffold:

1. Click the [Create A New Scaffold](#) link. The New Scaffold window appears.



New Scaffold window

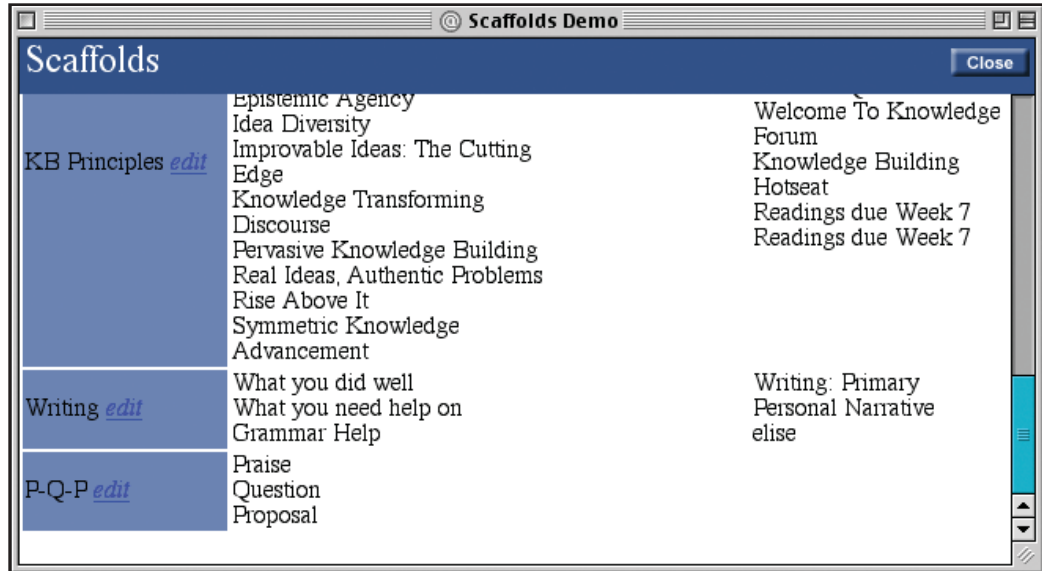
2. Type the scaffold name in the **Scaffold Text** field.
3. Type a scaffold support in the **Supports** field.
4. Click **Add**. The support appears in the **Supports** list box.



Support added

5. Repeat steps 3 and 4 until all the supports you want are added to the **Supports** list box.
6. Click **Close and Contribute**. The new scaffold is added to the end of the Scaffolds window.

Note: Your newly created scaffold does not have any groups or views associated with it yet.



New scaffold

To cancel a new scaffold before contributing:

- Click [Cancel](#).

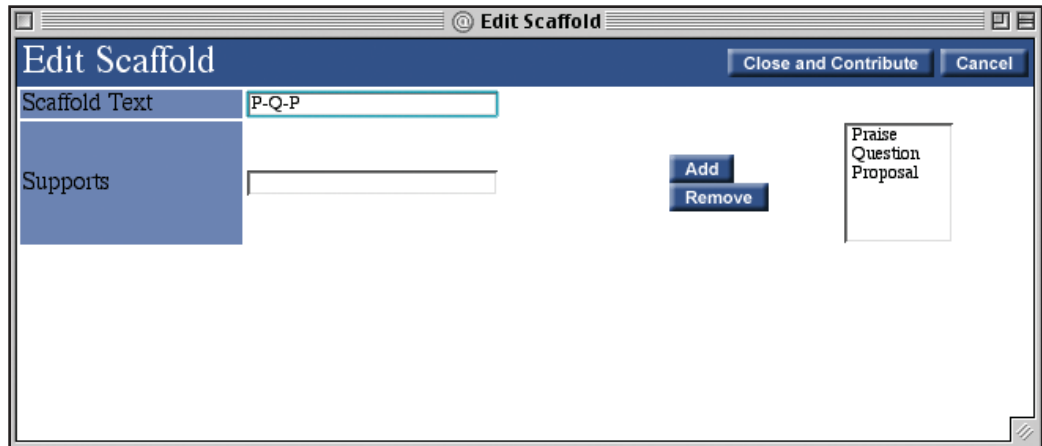
The New Scaffold window closes without saving the scaffold.

13.4 EDITING A SCAFFOLD

Editors, managers, and writers (who have permission) can edit a scaffold and its supports from the Scaffolds window.

To edit a scaffold:

1. Click the [edit](#) link after the scaffold name. The Edit Scaffold window appears.



Edit Scaffolds window

2. Edit the fields as needed.
3. Click **Close and Contribute**.

You can remove a scaffold support from the **Supports** list box. Perform the following steps before clicking the **Close and Contribute** button when editing the scaffold settings.

To remove a scaffold support:

1. Select the support in the **Supports** list box.
2. Click **Remove**.

To cancel changes to a scaffold before contributing:

- Click **Cancel**.

The Edit Scaffold window closes without saving your changes.



Note: Your HTML tags will not be interpreted by the client. They will look like they do in write mode in the browser.

If you want to change the format of the text displayed in your notes, you will need to include HTML tags in the **Content** field of your note. This section includes a basic introduction to some HTML tags. If you would like to learn more about HTML, there are some very good online resources, as well as printed materials available. Visit a bookstore, ask your local librarian or a teacher, or perform a search on the Web.

A.1 TEXT FORMATTING

To make text bold: `Bold`

To display text in boldface:

Type:

```
<b>I am bold!</b>
```

I am not.

Display:

I am bold!

I am not.

To make text italic: `<I>Italics</I>`

To display text in italics:

Type:

```
<I>I am in italics!</I>
```

I am not.

Display:

I am in italics!

I am not.

To center text: `<CENTER>Center</CENTER>`

To center the display:

Type:

```
<CENTER>This text is centered.</CENTER>
```

Display:

This text is centered.

To make text larger: `<HN>Heading</HN>`

This HTML tag specifies that the contained text is to be made a heading. The N represents a number between 1 and 6. So, to make a heading level 1, you would use `<H1>Heading text</H1>`. The different headings are shown below.

Heading Level 1

Heading Level 2

Heading Level 3

Heading Level 4

Heading Level 5

Heading Level 6

To position a heading: **align=**

This attribute specifies the alignment of the heading. Values are left (default), right, and center.

Type:

```
<H3 align=center>Center Heading</H3>
```

Display:

Center Heading

A.2 LISTS

You can create either a bulleted list or a numbered list.

For a list with bullets:

- Point 1
- Point 2

Use these Unordered List tags:

```
<UL>  
<LI>Point 1</LI>  
<LI>Point 2</LI>  
</UL>
```

The `` and `` mark the beginning and end of the unordered (bulleted) list. Use `` for each list item.

For a list with numbers:

1. Point 1
2. Point 2

Use these Ordered List tags:

```
<OL>  
<LI>Point 1</LI>  
<LI>Point 2</LI>  
</OL>
```

The `` and `` mark the beginning and the end of the ordered (numbered) list. Use `` for each list item.



B.1 TROUBLESHOOTING QUESTIONS AND ANSWERS

I'm a Windows user and I could not access the URL.

Make sure you entered the entire URL, including *http://*. If you still cannot access the URL, contact your system administrator.

The graphics on my browser look strange.

Try refreshing the browser by clicking the **Refresh** or **Reload** button. You could also try going back to the previous page and then return to the page in question.

I created or edited a note, but my work didn't save.

You may have clicked the **Close** button on the left side of the note's title bar. This button closes the window, but does not save your work. Make sure you click the **Close and Contribute** button in order to save your work.

I tried to create a new movie for a view or a note. However, when I uploaded it, the Upload Progress window said the file size was zero and now I can't get it to run.

First, play the movie outside Knowledge Forum to make sure it runs properly. If the movie runs fine outside Knowledge Forum, try creating the new movie in Knowledge Forum again. If you still have the same problem, contact your system administrator.

My movie or attachment used to be accessible, but now the link doesn't work.

Check with your system administrator to see if he or she removed the Attachments or Movies folder. If so, the attachments and movies must be copied to the new folder. Or, if your administrator changed the database name, the Database folder name in Attachments and Movies directories must be changed as well.



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