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Knowledge Forum® 4.5

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- Project Directors: Marlene Scardamalia and Carl Bereiter
- Research and Development Team (names in bold type show the current team)


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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.
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 INTRODUCTION

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.
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.
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.ikit.org/
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.

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.

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.
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.

**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.

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

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.

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
Each of the four Knowledge Forum objects are described below.

<table>
<thead>
<tr>
<th>Object</th>
<th>Link Icon</th>
<th>Chapters Covered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes</td>
<td>![Note Icon]</td>
<td>4, 5</td>
<td>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.</td>
</tr>
<tr>
<td>Views</td>
<td>![View Icon]</td>
<td>3, 6, 9</td>
<td>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.</td>
</tr>
<tr>
<td>Attachments</td>
<td>![Attachment Icon]</td>
<td>7</td>
<td>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.</td>
</tr>
<tr>
<td>Movies</td>
<td>![Movie Icon]</td>
<td>8</td>
<td>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.</td>
</tr>
</tbody>
</table>
### 2.3 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.

<table>
<thead>
<tr>
<th>User Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reader</td>
<td>Readers can see only published views. They cannot write or change anything in the knowledge base.</td>
</tr>
<tr>
<td>Visitor</td>
<td>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.</td>
</tr>
<tr>
<td>Writer</td>
<td>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.</td>
</tr>
<tr>
<td>Editor</td>
<td>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.</td>
</tr>
<tr>
<td>Manager</td>
<td>Managers have access to all options. Managers can add all types of users, including managers, to the system.</td>
</tr>
</tbody>
</table>

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*.

*Note: See section 12.4.3 to learn more about assigning user types.*
2.4 EXITING KNOWLEDGE FORUM

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 logout.

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.
A view consists of the following items:

<table>
<thead>
<tr>
<th>Item</th>
<th>Where Covered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>3.4.1</td>
<td>Shows the name of the database and the view.</td>
</tr>
<tr>
<td>Headings</td>
<td>3.5.3</td>
<td>Provides an area to focus discussion within a view by highlighting designated Knowledge Forum objects.</td>
</tr>
<tr>
<td>Toolbar</td>
<td>3.2</td>
<td>Allows you to access other features of the knowledge base or add Knowledge Forum objects to the view.</td>
</tr>
<tr>
<td>Action bar</td>
<td>3.5, 5, 11.2</td>
<td>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.</td>
</tr>
<tr>
<td>Activity graph</td>
<td>3.5.5</td>
<td>Displays monthly information on the notes in the current view.</td>
</tr>
<tr>
<td>Notes</td>
<td>3.3.1, 4, 5</td>
<td>Shows notes connected to this view.</td>
</tr>
<tr>
<td>Attachments</td>
<td>3.3.2, 7</td>
<td>Shows attachments connected to this view.</td>
</tr>
<tr>
<td>Movies</td>
<td>3.3.3, 8</td>
<td>Shows movies connected to this view.</td>
</tr>
<tr>
<td>View links</td>
<td>3.3.4, 6</td>
<td>Shows links to other views connected to this view.</td>
</tr>
<tr>
<td>View Information</td>
<td>3.3.5</td>
<td>Provides information about the view's history.</td>
</tr>
<tr>
<td>View Authors</td>
<td>3.3.6</td>
<td>Shows who is responsible for this view.</td>
</tr>
<tr>
<td>External Link</td>
<td>3.3.7</td>
<td>Provides the URL of the view so users can access the view from a document outside Knowledge Forum.</td>
</tr>
</tbody>
</table>

**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.
3 VIEWS

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

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.

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Name</th>
<th>Chapter Covered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="New Note" /></td>
<td>New Note</td>
<td>4</td>
<td>Allows you to create a new note.</td>
</tr>
<tr>
<td><img src="image" alt="New View Link" /></td>
<td>New View Link</td>
<td>6</td>
<td>Allows you to add a view link to the view.</td>
</tr>
<tr>
<td><img src="image" alt="New Attachment" /></td>
<td>New Attachment</td>
<td>7</td>
<td>Allows you to add an attachment to the view.</td>
</tr>
<tr>
<td><img src="image" alt="New Movie" /></td>
<td>New Movie</td>
<td>8</td>
<td>Allows you to add a movie to the view.</td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Name</th>
<th>Chapter Covered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="View List" /></td>
<td>View List 9</td>
<td>9</td>
<td>Allows you to find or create a view.</td>
</tr>
<tr>
<td><img src="image" alt="Search" /></td>
<td>Search 10</td>
<td>10</td>
<td>Allows you to search for objects in the database.</td>
</tr>
<tr>
<td><img src="image" alt="My Reader" /></td>
<td>My Reader 11</td>
<td>11</td>
<td>Opens a temporary storage place called My Reader. There you can select, read, and sort several notes at once.</td>
</tr>
<tr>
<td><img src="image" alt="Authors" /></td>
<td>Authors 12</td>
<td>12</td>
<td>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.</td>
</tr>
<tr>
<td><img src="image" alt="Scaffolds" /></td>
<td>Scaffolds 13</td>
<td>13</td>
<td>Allows you to view scaffolds. Allows editors and managers to create or edit scaffolds.</td>
</tr>
</tbody>
</table>
The last section of the toolbar allow you to get help or exit.

<table>
<thead>
<tr>
<th>Toolbar Button</th>
<th>Name</th>
<th>Where Covered</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Help icon]</td>
<td>Help</td>
<td></td>
<td>Provides online help.</td>
</tr>
<tr>
<td>![Logout icon]</td>
<td>Logout</td>
<td>2.4</td>
<td>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.</td>
</tr>
</tbody>
</table>

### 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

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.

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

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

A note in a view

### 3.3.2 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.

Note: See chapter 7 to learn more about attachments.
3 Views

3.3.3 Movies

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.

Note: See chapter 8 to learn more about movies.

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

3.3.4 View Links

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.

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

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.

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

3.3.6 View Authors

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.
3 VIEWS

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

Example: [View URL for external use](Copy with browser's “Copy Link” function.)

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.

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.

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

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

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

1. Click the external link.

2. Log on to Knowledge Forum if necessary.

The linked view appears.

3.4 ADDITIONAL VIEW FEATURES

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

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.

<table>
<thead>
<tr>
<th>Status</th>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Locked</td>
<td>🗝️</td>
<td>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.</td>
</tr>
<tr>
<td>Unlocked</td>
<td>🗝️</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

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

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

<table>
<thead>
<tr>
<th>View Type</th>
<th>Icon</th>
<th>View Accessible To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working</td>
<td><img src="image" alt="Working" /> (blue)</td>
<td>Writers, editors, and managers</td>
</tr>
<tr>
<td>Editor</td>
<td><img src="image" alt="Editor" /> (gray)</td>
<td>Editors and managers</td>
</tr>
<tr>
<td>Published</td>
<td><img src="image" alt="Published" /> (blue)</td>
<td>Readers, visitors, writers, editors, and managers</td>
</tr>
<tr>
<td>Private</td>
<td><img src="image" alt="Private" /> (gold)</td>
<td>Specifically designated view authors and all managers</td>
</tr>
</tbody>
</table>

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.

**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.

**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 VIEWS

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.

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

Clearing selected object

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

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 Views

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.

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.

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.
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**.
The heading is added to the view.

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.

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.
3 Views

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.

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.

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

**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.

### Purpose of this view

- **New Features**
- **Introduction to Headings**
- **Heading Steps**

### Background

- **Knowledge Forum’s Origin**
- **About Knowledge Forum**

To change the order of the headings in a view:

- Click `▲` to move a heading up.
- Click `▼` to move a heading down.

### 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.
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.

#### 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 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.

**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.

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

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.
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.

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.
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.

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

### 4.2 OPENING A NOTE

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: All editors and managers are considered to be authors.
To open a note in read mode:

- Click the note's title or icon.

The note opens 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](image)

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

- Click Close.

To close a note in read mode:

- Click Close.

### 4.2.2 Opening a Note in Write Mode

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](image)

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

The note opens in 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

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.
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.

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

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.

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

Scaffold

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.
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.

```
<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.

```
New information
```

Support in read mode

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

```
<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.

```
New information Enter text here.
```

Support content in read mode

---

**Note:** See chapter 10 to learn more about searches.
**CONTENT**

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]

**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.
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.

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.

The problem appears in the Problems section in read mode.
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 [Cancel] to cancel the note. A confirmation dialog box appears.
2. Click [OK] 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 [Advanced] or [Basic].

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

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**

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.

**Note:** See chapter 7 to learn more about attachments.
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.

To turn on the display of image attachments:

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

**Publish**

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.

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.

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.

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: 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.
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.

<table>
<thead>
<tr>
<th>Connection Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference</td>
<td>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.</td>
</tr>
<tr>
<td>Web Link</td>
<td>Allows authors to enter a URL in a note in HTML format. If a user clicks the URL, the Web page displays.</td>
</tr>
<tr>
<td>Publish</td>
<td>Allows authors to designate work as exemplary, thereby highlighting it for other authors.</td>
</tr>
<tr>
<td>Co-Author</td>
<td>Allows two or more authors to work together as authors of the same note.</td>
</tr>
<tr>
<td>Rise-Above</td>
<td>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.</td>
</tr>
<tr>
<td>Annotate</td>
<td>Allows authors to respond to another author’s note by adding a “sticky-type” note to it.</td>
</tr>
<tr>
<td>Build-On</td>
<td>Allows authors to expand and “build on” the notes of other authors.</td>
</tr>
</tbody>
</table>
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.

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 will appear in the Content field.

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.
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.

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.

**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.

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.
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.

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.

4. Click **Close and Contribute**
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.

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.

2. Click Close and Contribute.
The note appears in read mode with a view link for the referenced view in the content area.

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.
2. Click Close and Contribute.

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

**Here is an example of a Web link:**

![Web link in note](http://www.knowledgeforum.com)

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.

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.

---

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

### 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.
3. Click **Close and Contribute**.

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.

You can unsponsor a note you have sponsored.

To unsponsor a note:

- Click the **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 **Advanced** if not in advanced mode.

2. Click the **Published** check box.
3. Click Close and Contribute.

A published note's icon changes to  

### 5.4 Co-authoring a Note

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 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.

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.

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.
5. 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.

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.

4. Click .

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.

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

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.
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.

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*.

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

---

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

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

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.

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.

### ADD NOTES

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.

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

**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.
SHOW OR HIDE NOTE CONTENT

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

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 the Annotate button. The New Annotation window appears.

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.

Tip: You can cancel your annotation by clicking the Cancel button or closing the New Annotation window.
You can view an annotation in read mode.

To view an annotation:

- Click . The annotation opens in read mode.

To close the Annotation window:

- Click Close.

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.
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.

3. Edit the annotation in the **Annotation** field.

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

4. Click **Close and Contribute**.

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

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.
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

- [Creating a Build-on edit](#) by eric [Oct-07-2002]

*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.
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.

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

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.

```
<kf:view view="Advanced Features" ID="33" />
```

2. Click View.

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 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.

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.
6. Select the view to add the attachment to from the Views drop-down list. The default is the current view.

7. Click .

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

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

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

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.

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 the *Remove Author* button.

5. Click the *Close and Contribute* button.

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

To close the Edit Attachment window without making changes:

- Click the *Close* button.
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.
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.

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

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

7. Click Close and Contribute.

The note appears in read mode with the attachment. You will see the 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.
7.3.2 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 pull-down in the Reference section. The HTML code for the attachment appears in the Content field.

2. Click the Close and Contribute button.

The note appears in read mode with the attachment.

To open an attachment:

- Click the attachment's title link

The note appears in read mode with the attachment. You will see the 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.

The note appears in read mode with the attachment.

To open an attachment:

- Click the attachment's title link.

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.

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.

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.
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**.

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

*Note: Associating a poster frame, steps 8–10, is optional.*
Once the movie is uploaded, it is added to the view.

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.
8 MOVIES

8.2.2 EDITING MOVIE INFORMATION

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.

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

To close the Edit Movie window without making changes:

- Click "Close".

### 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.

**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**.

   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.

8. Click **Close and Contribute**.

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

---

**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.
### 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.

---

**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 MOVIES

8.3.3 OPENING A MOVIE IN A NOTE

You can open a movie in a read mode note.

To open a movie:

- Click the movie's 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 xpl.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.

   ![Movie with timecode controls](image)

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

   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.
5. Copy the HTML statement.
6. Open a note in write mode.
7. Paste the HTML statement in the Content field.
8. Click Close and Contribute.

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

Tip: To play the entire movie, click the Play complete movie link (Internet Explorer), the Play complete movie link (Netscape), or use the standard movie controls.
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:

1. 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.

To close the View List window:

1. Click .
9 View List

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.

<table>
<thead>
<tr>
<th>Show Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Level 1</td>
<td>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.</td>
</tr>
<tr>
<td>All Views</td>
<td>Displays a list of all views in the knowledge base.</td>
</tr>
<tr>
<td>My Hotlist</td>
<td>Displays views added by you to your personal hotlist. Also shows views added to your group hotlist by an editor or manager.</td>
</tr>
<tr>
<td>Editor</td>
<td>Displays views only an editor or manager can access. Does not display unless you are an editor or manager.</td>
</tr>
</tbody>
</table>

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.

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

**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.
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.

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.

View 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 View List

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

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.
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.

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

11. Click Close and Contribute.

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

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.

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

**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.

### 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.

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.

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 View List

9.4.4 PERMISSIONS

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

<table>
<thead>
<tr>
<th>View Type</th>
<th>Icon</th>
<th>User Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Working</td>
<td>📝 (blue)</td>
<td>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.</td>
</tr>
<tr>
<td>Editor</td>
<td>📝 (gray)</td>
<td>Editors and managers can access this restricted view. It does not appear in the View List window for writers.</td>
</tr>
<tr>
<td>Published</td>
<td>📝 (blue)</td>
<td>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.</td>
</tr>
<tr>
<td>Private</td>
<td>📝 (gold)</td>
<td>Only the view authors and managers can access this view. Editors cannot.</td>
</tr>
</tbody>
</table>

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.
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.

<table>
<thead>
<tr>
<th>Scaffolds</th>
<th>Opinion personal narratives Assessment Constructive Criticism PQP Writing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Add Scaffold Remove Scaffold</td>
</tr>
<tr>
<td>Theory Building KB Principles</td>
<td></td>
</tr>
</tbody>
</table>

Scaffolds section

9.5 EDITING VIEW SETTINGS

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.
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.
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.

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:

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

<table>
<thead>
<tr>
<th>Search for</th>
<th>Notes</th>
<th>Views</th>
<th>Attachments</th>
<th>Movies</th>
</tr>
</thead>
</table>

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.
Your verb selection means the following for your search:

<table>
<thead>
<tr>
<th>Verb Selection</th>
<th>Search Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>is</td>
<td>Matches entered or selected word exactly.</td>
</tr>
<tr>
<td>starts with</td>
<td>Finds words beginning with the specific letter or series of letters entered.</td>
</tr>
<tr>
<td>contains</td>
<td>Includes the specified letter or series of letters anywhere in the word.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Verb Selection</th>
<th>Text Entry</th>
<th>Result Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>is</td>
<td>problem</td>
<td>problem</td>
</tr>
<tr>
<td>starts with</td>
<td>problem</td>
<td>problem, problems, problematic</td>
</tr>
<tr>
<td>contains</td>
<td>pro</td>
<td>problem, problems, problematic, appropriate, protest</td>
</tr>
</tbody>
</table>

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 Find.

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

Results counter

To view the next page of results:

- Click Next.

To view previous page of results:

- Click Previous.
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.

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.

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).
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

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.
10.3.3 SEARCHING FOR DELETED 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.
10 SEARCH AND NOTIFICATION

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.
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**

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.
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.

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

4. Click Close and Contribute.

The rise-above note appears in the view you selected from the in view drop-down list.
4. Click **Close and Contribute**.

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

### 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.

---

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

*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.

To save a search:

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

2. Click "Save Search".

The search is added to 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".
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).
3. Click **Save Search**.

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.

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.

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 .

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.

3. Click .

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.
11.1 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.

The My Reader window opens with the added objects.
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 Close.

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.
11.4.2 CLEARING MY READER

You can clear objects from the My Reader window.

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.

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

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.

4. Click Close and Contribute.

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

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.

4. Click Close and Contribute.

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

2. Click .
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.

To close the Author List window:

- Click **Close**.

### 12.3 Author List for All Users

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.

![Edit Author window accessed from a view](image)
The elements of the Edit Author window are described in the following tables. The first table describes the basic user fields.

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification</td>
<td>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.</td>
</tr>
<tr>
<td>Window Attributes</td>
<td>You can enable the status bar at the bottom of every window. See the example of the status bar below.</td>
</tr>
<tr>
<td>Authors’ Appearance</td>
<td>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.</td>
</tr>
<tr>
<td>Activity Graphs</td>
<td>You can enable the Show Graph check box in all views and the View List.</td>
</tr>
<tr>
<td>View Toolbar</td>
<td>You can set the toolbar to display in a wide or narrow format.</td>
</tr>
</tbody>
</table>

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).
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 **Close and Contribute** to return to the view.

Or

17b. Confirm your changes and continue to the Author List.

i. Click **Authors / Groups**. A confirmation window appears.

![Confirmation window](image)

**Confirmation window**

ii. Click **OK**. The Author List appears.
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.

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.

   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.
**Cancel Editing Author Information**

To cancel editing author information from the Edit Author window:

- Click **Cancel**.

**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.
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.

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.
12 Author List

12.4 Author List for Editors and Managers

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.

Tip: Use the All Groups link at the top of the Author List window to jump to the All Groups list.

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.
New Group window
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.

<table>
<thead>
<tr>
<th>Group Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>You can type the name of the group.</td>
</tr>
<tr>
<td>Create Views</td>
<td>You can click the check box to allow writers to create their own views. Makes the New View button available on the View List.</td>
</tr>
<tr>
<td>Lock Views</td>
<td>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.</td>
</tr>
<tr>
<td>Publish Views</td>
<td>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.</td>
</tr>
<tr>
<td>Create Scaffolds</td>
<td>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.</td>
</tr>
<tr>
<td>Home View</td>
<td>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.</td>
</tr>
<tr>
<td>Hotlist</td>
<td>You can select certain views to appear in the Group Hotlist section of My Hotlist for every author of the group.</td>
</tr>
<tr>
<td>Scaffolds</td>
<td>You can determine the scaffolds available to authors in a group when they create notes.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Group Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notification</td>
<td>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 <strong>Send notification even if it’s empty</strong> check box is unchecked.</td>
</tr>
<tr>
<td>Window Attributes</td>
<td>You can enable the status bar at the bottom of every window. By default, this setting is unchecked.</td>
</tr>
<tr>
<td>Authors’ Appearance</td>
<td>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, <strong>Username</strong> is selected.</td>
</tr>
<tr>
<td>Activity Graphs</td>
<td>You can enable the <strong>Show Graph</strong> check box in all views and the View List for the group. By default, this setting is unchecked.</td>
</tr>
<tr>
<td>View Toolbar</td>
<td>You can set the toolbar to display in a wide or narrow format. By default, the wide format is selected.</td>
</tr>
</tbody>
</table>

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 ![Add](Add.png).

7. Repeat steps 5 and 6 until all the hotlist views you want are added to the **Hotlist** list box on the right.
8. Select available scaffolds from the **Scaffolds** list box.

9. Click ![Add Scaffold](image).

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](image).

Knowledge Forum adds the group to the All Groups list.

<table>
<thead>
<tr>
<th><strong>All Groups</strong></th>
<th><strong>New Group</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Group Name</strong></td>
<td><strong>Authors</strong></td>
</tr>
<tr>
<td>Students</td>
<td>9</td>
</tr>
<tr>
<td>Flight Class</td>
<td>12</td>
</tr>
<tr>
<td>Guests</td>
<td>11</td>
</tr>
<tr>
<td>K12</td>
<td>8</td>
</tr>
<tr>
<td>Media</td>
<td>2</td>
</tr>
<tr>
<td>Medical Group</td>
<td>12</td>
</tr>
<tr>
<td>NECC</td>
<td>0</td>
</tr>
<tr>
<td>NECC Visitor</td>
<td>0</td>
</tr>
<tr>
<td>Nunmoot</td>
<td>5</td>
</tr>
<tr>
<td>Period 1</td>
<td>40</td>
</tr>
<tr>
<td>Presentation</td>
<td>28</td>
</tr>
<tr>
<td>Sample Group</td>
<td>26</td>
</tr>
<tr>
<td>University</td>
<td>1</td>
</tr>
</tbody>
</table>

**All Groups list**

To cancel a new group before contributing:

- Click ![Cancel](image).
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.

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.
12 Author List

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 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.
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.

<table>
<thead>
<tr>
<th>Task</th>
<th>Reader</th>
<th>Visitor</th>
<th>Writer</th>
<th>Editor</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>View published views</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>View unpublished views</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>View editor views</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>View private views</td>
<td>no</td>
<td>no</td>
<td>own</td>
<td>own</td>
<td>yes</td>
</tr>
<tr>
<td>Create notes</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Edit notes</td>
<td>no</td>
<td>own</td>
<td>own</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Create views</td>
<td>no</td>
<td>no</td>
<td>maybe*</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Create editor views</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Create private views</td>
<td>no</td>
<td>no</td>
<td>maybe*</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Edit views</td>
<td>no</td>
<td>no</td>
<td>own</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Create scaffolds</td>
<td>no</td>
<td>no</td>
<td>maybe*</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Lock/unlock views</td>
<td>no</td>
<td>no</td>
<td>maybe*</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Publish views</td>
<td>no</td>
<td>no</td>
<td>maybe*</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Add groups</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Add users</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>yes**</td>
<td>yes</td>
</tr>
<tr>
<td>Create self-registration codes</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>yes</td>
<td>yes</td>
</tr>
<tr>
<td>Edit self-registration codes</td>
<td>no</td>
<td>no</td>
<td>no</td>
<td>yes***</td>
<td>yes</td>
</tr>
</tbody>
</table>
12.4.4 Editing Users

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.

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:

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

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.

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

Inside a .csv file.
To import authors from the Author List:

1. Click the Import Authors link. The Import Authors window appears.

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.

<table>
<thead>
<tr>
<th>Scott</th>
<th>Truman</th>
<th>truman</th>
<th>Group X</th>
<th>writer</th>
<th><a href="mailto:sbuman@class.com">sbuman@class.com</a></th>
</tr>
</thead>
<tbody>
<tr>
<td>Erin</td>
<td>Buchi</td>
<td>buchi</td>
<td>Group X</td>
<td>reader</td>
<td><a href="mailto:ebuchi@class.com">ebuchi@class.com</a></td>
</tr>
<tr>
<td>Gwen</td>
<td>Toes</td>
<td>toes</td>
<td>Group X</td>
<td>visitor</td>
<td><a href="mailto:gtoes@class.com">gtoes@class.com</a></td>
</tr>
<tr>
<td>Pam</td>
<td>Marcos</td>
<td>pmarco</td>
<td>Group X</td>
<td>writer</td>
<td></td>
</tr>
</tbody>
</table>

Author List
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](image)

**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](image)

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.
4. Click Add.

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).

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

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.

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).
To enter as an anonymous reader using an external link:

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

   External link pasted below:


2. Click the external link.

The note or view from the other database opens.

### 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.

<table>
<thead>
<tr>
<th>Registration Codes list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
</tr>
<tr>
<td>NECC</td>
</tr>
<tr>
<td>Media</td>
</tr>
<tr>
<td>K12</td>
</tr>
<tr>
<td>University</td>
</tr>
</tbody>
</table>

To create a new registration code:

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.
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.
13.1 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.

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.

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.
13 Scaffolds

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

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.
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.

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.
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.
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.
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: `<B>Bold</B>`

To display text in boldface:

Type:

```html
<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:

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

I am not.

Display:

*I am in italics!*

I am not.

**Note:** Your HTML tags will not be interpreted by the client. They will look like they do in write mode in the browser.
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>
<P>Point 1</P>
<P>Point 2</P>
</UL>

The <UL> and </UL> mark the beginning and end of the unordered (bulleted) list. Use <LI> for each list item.

For a list with numbers:

1. Point 1
2. Point 2

Use these Ordered List tags:

<OL>
<P>Point 1</P>
<P>Point 2</P>
</OL>

The <OL> and </OL> mark the beginning and the end of the ordered (numbered) list. Use <LI> for each list item.
APPENDIX B: TROUBLESHOOTING

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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