Chainformation Admin User Guide
(Brand Designs and Appearance)

Last Updated: January 20, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Brand Designs and Appearance** settings on the **System setup** page.

Chainformation allows you to create multiple brand profiles and apply them to different business areas. In this way, you could control what information is available to users associated with a particular business area on their startpage, and the sidebar of Pages and Files modules. The default brand profile is used for all business areas that are not assigned a different brand profile.

You can customise the layout and graphical appearance of different pages of a brand by adding different widgets to its startpage and the sidebar of other pages. You can customise these widgets by adding various content items such as files, pages, links, etc. Likewise, you can add dynamic content such as listing, feed and table of content to these widgets as well. The dynamic content in a widget updates automatically based on its tags and other factors.

Remember, you cannot create different login pages for different brand profiles. Instead, all brands use the same login page. You can manage the login page appearance of your organisation's internet on the settings page of your default brand profile.

Now, we will discuss the different aspects of **Brand design and appearance** settings of a **Chainformation** platform as follows:

- ➢ Review Your Available Brand Profiles
- ➢ Edit Brand Design and Appearance Settings
    - ○ Manage Startpage Design of a Brand
    - ○ Manage Sidebar Settings of a Brand
    - ○ Manage List View Settings of a Brand
- ➢ Create a New Brand Profile
- ➢ Change Your Default Brand Profile
- ➢ Delete a Brand

Review Your Available Brand Profiles

1. Once you have logged in to the **Chainformation** platform, click the **System setup** button in the left-side menu to open the **System setup** page.
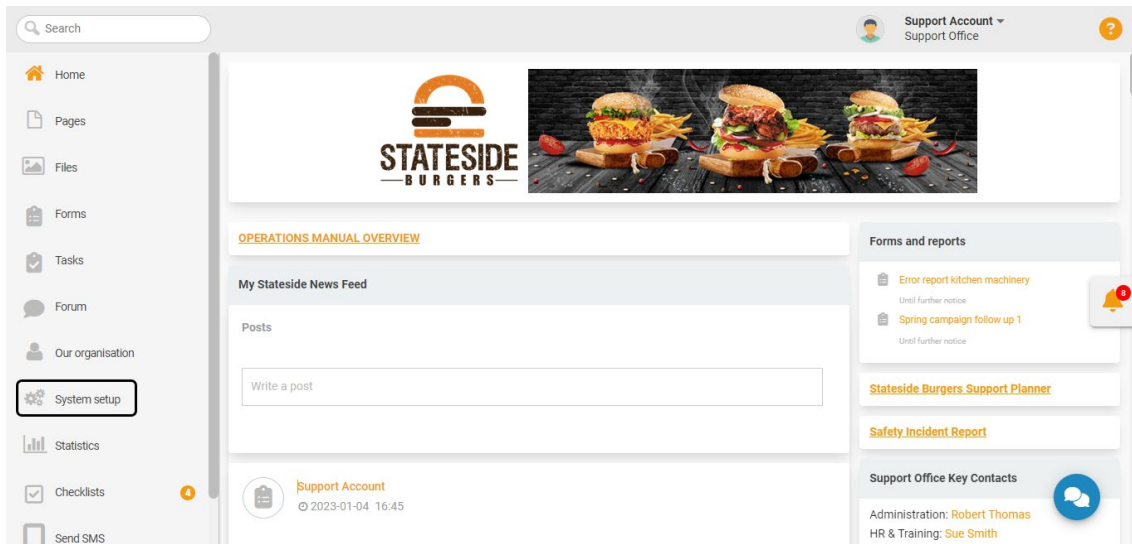
By default, you will be redirected to the **Activity log** tab.

2. Click the **Other tools and settings** button from the header menu of the **System setup** page to open the **Other tools and settings** tab.

3. On the **Other tools and settings** page, click the **Brand designs and appearance** button to open the **Brand designs and appearance** page.

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| Activity log | Roles | Tags | Tables of contents | Business areas | Other tools and settings |

Name	Description	Last edited
Brand designs and appearance		
Colleague custom fields	Customise input fields for colleagues	2021-12-18 Support Account
MS Word import		
Organization import		
Request access	Specify selectable roles for users requesting a new use...	2022-01-31 Anders Hall
SMTP server	Configure a company email account to be used for syst...	2020-01-27
Support contact	Contact details for internal support	2021-12-21 Support Account
Unit custom fields	Customise input fields for units	2021-12-18 Support Account

On the **Brand designs and appearance** page, you can manage your default and other brand profiles. You can also create a new brand profile or an exact copy of an existing brand by cloning it.
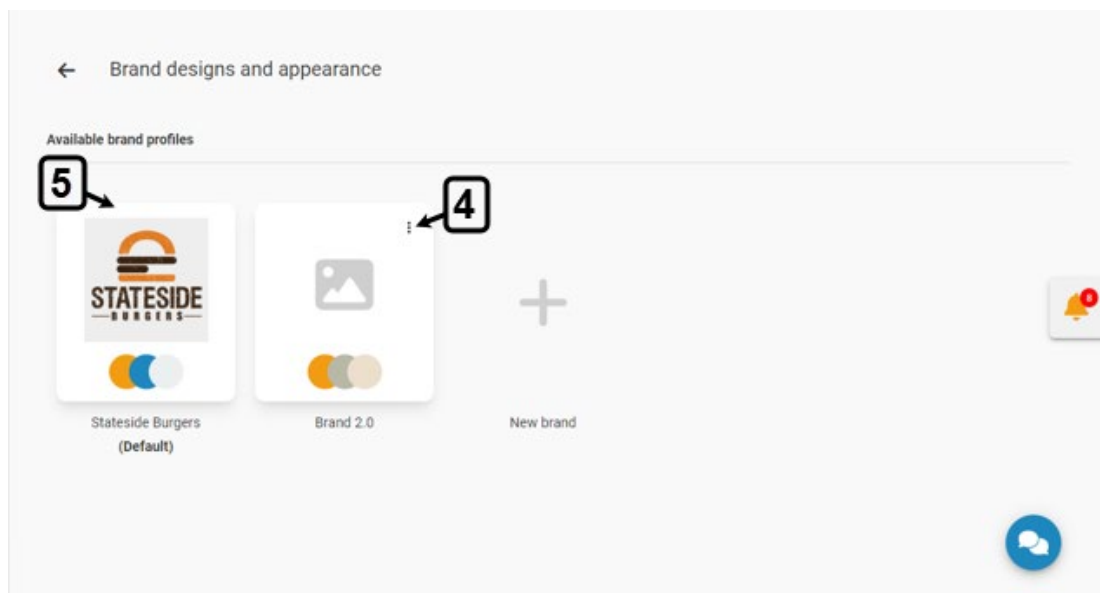
4. To see the options available for a brand, hover your mouse over its logo on the **Brand designs and appearance page**, and click the **three-dots ellipsis** icon in the top-right corner of the brand logo.

This will open a drop-down menu showing the following four options.

➢ Edit brand
➢ Clone brand
➢ Default brand profile

➢ Delete brand

We will discuss how these options work for a brand in the later parts of this manual.

5. Click a **brand widget** from **Available brand profiles** to review and/or edit its design and appearance settings.

This will open the settings page of the selected brand where you can view and change (if required) its name, logo, background image, and other appearance settings. (See the User Guide for **Edit Brand Design and Appearance Settings**)
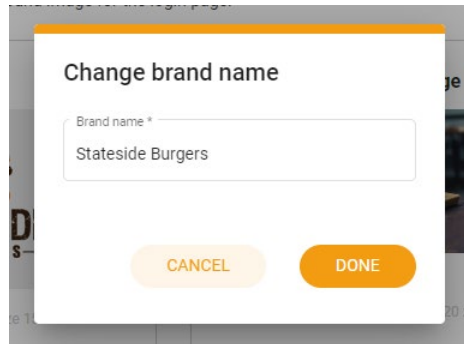

Edit Brand Design and Appearance Settings

On the settings page of a brand, follow the navigation steps demonstrated below to update its design and appearance settings.
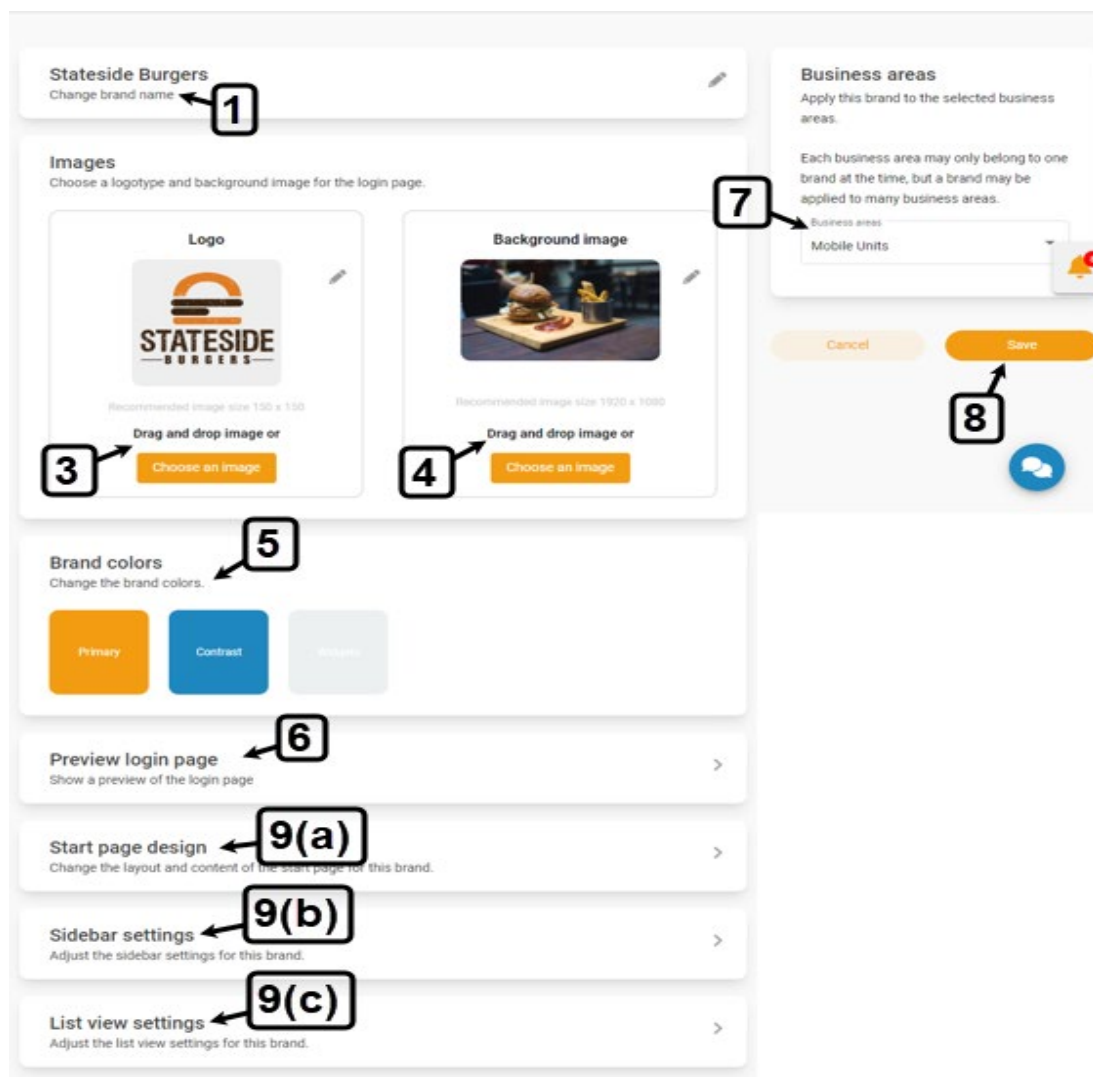
1. Click the **Change brand name** widget to update brand name.

2. Enter new **Brand name** on the **Change brand name** dialogue and click the **Done** button to rename the selected brand.

3. Upload or drag and drop logotype or image that represents the selected brand in the **Logo** image card.

4. Upload or drag and drop the background image for the login page of your organisation in the **Background image** card.

Note: Chainformation doesn't allow you to create different login pages for different brands. Instead, all brands use the login page of the default brand.

Therefore, the system shows only the **Brand logotype** card and **doesn't** show the **Background image** card for non-default brands.

5. Select **Primary**, **Contrast**, and **Widgets** colors of the selected brand from the **Brand colors** cards.

Note: Primary color is the color of different buttons, icons, links, badges, headers, etc. on the startpage, mobile app, and most modules of the selected brand.

Contrast color replaces Primary color in Messaging and some other modules.

Widgets color is the background color for widget headers on the startpage of the selected brand.

6. Click the **Preview login page** button to see a preview of the login page of your default brand.

Note: The Preview button is visible only for the default brand as all other brands use the same login page as the default one. See the User Guide for **Default Brand**

7. Select one or more **Business areas** to which you want to apply the selected brand.

Note: You can apply a brand to more than one business area. But, a business area can only belong to one brand at the time.

8. Once you have made all the required changes, click the **Save** button to apply these changes to the selected brand.

9. Now, proceed to review and edit (if required) **startpage design**, **sidebar** and **list view settings** of the selected brand by clicking on their respective widget. (See User Guides for **Startpage Design, Sidebar and List Settings of a Brand**)

Manage Startpage Design of a Brand

1. On the settings page of the selected brand, click the **Start page design** widget to manage startpage appearance settings of this brand.

This will open the **Appearance** settings of this brand's startpage.
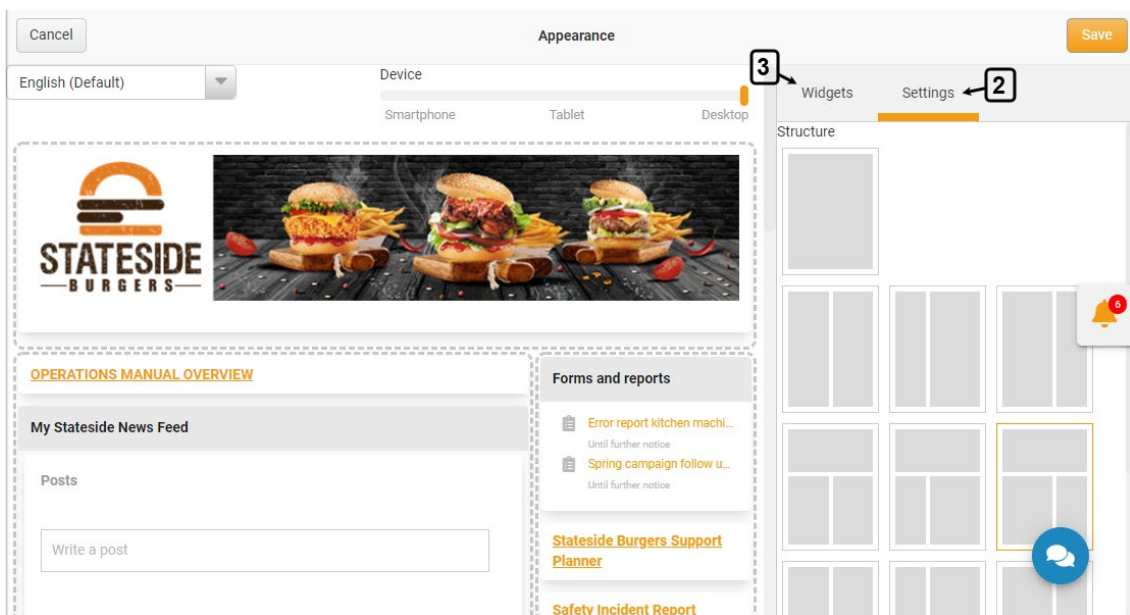
First of all, select an appropriate structure of the startpage i.e. decide how many placeholders you want to add to it.

2. To do this, click the **Settings** button in the sidebar of the **Appearance** page and select your required structure from the **Structure** options.

Note: You should never change the structure of a startpage once you have added widgets and content to its placeholder because it can disturb the order of widgets on the startpage and the content you have added to these widgets.

Now, proceed to add widgets to placeholders of your selected structure.

3. To do this, click the **Widgets** button in the sidebar of the **Appearance** page to access the list of available widgets.

You can add the following 7 types of widgets to the placeholders of your selected structure.

- Advanced text

- Page and file listing

- Table of contents

- Forum listing

- Feed

- Forum feed

- Forms listing

4. Drag your required widgets from the **Widgets** sidebar one by one and drop them in the placeholder where you want to show them on the startpage of the selected brand.
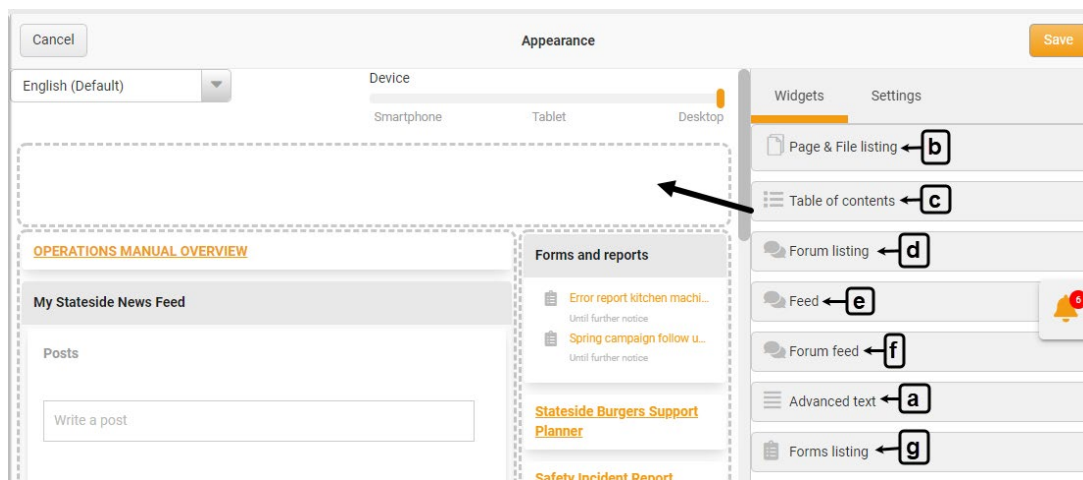
Now, we will discuss the options available with each one of these widgets that you can use to customise the content on a startpage.

Note: You can view and change default/current options for a widget by clicking it on the startpage Appearance page.

You can close the options menu of the selected widget by clicking the **Close** button in its top-right corner and proceed to add more widgets to a startpage.

(a) Advanced text

You can use the **Advanced text** widget to show a particular file, page, link or other static content on a startpage.
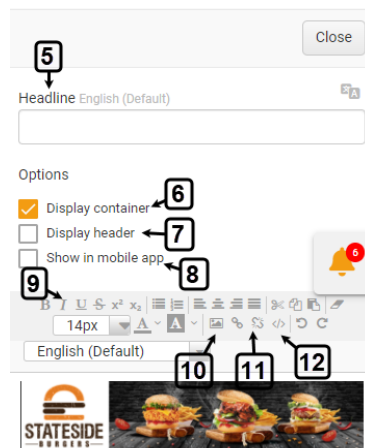
5. Enter a **Headline** for your selected widget.

6. Select the **Display container** option if you want to display the widget container for this content block.

7. Select the **Display header** option if you want to show the headline of content in this widget.

8. Select the **Show in mobile app** option if you want to show this widget on the homepage of the selected brand in the **Chainformation** mobile app.

Now, add the text and other items you want to show in this widget on the startpage of the selected brand.

Here is a brief summary of typographical options provided with the **Advanced text** widget.

9. You can use various basic and advanced text editing tools to format the text in this widget.

10. You can insert a file from the **Files** tab or upload it from your device to this widget.

11. You can **insert** or **remove** a **link** to a **checklist**, **colleague**, **file**, **page**, **form**, **website** and **email address**.

12. You can insert an **Iframe embed code** to show content from a third-party website like YouTube, Vimeo, Twitter, etc.

Note: You can add multiple files and links to a single **Advanced text** widget. However, we recommend you should add different files and links to different widgets instead of inserting multiple content items in the same **Advanced text** widget.

Remember, the files, pages, forms or links in an **Advanced text** widgets are static content items and they do not update automatically.

If you want to show any dynamic content on the startpage of the selected brand that updates automatically based on different factors, then you should also add dynamic widgets such as feed, listing and table of contents to its structure.

(b) Page and file listing

You can use the **Page and file listing** widget to show selected pages and files on the startpage of the selected brand.
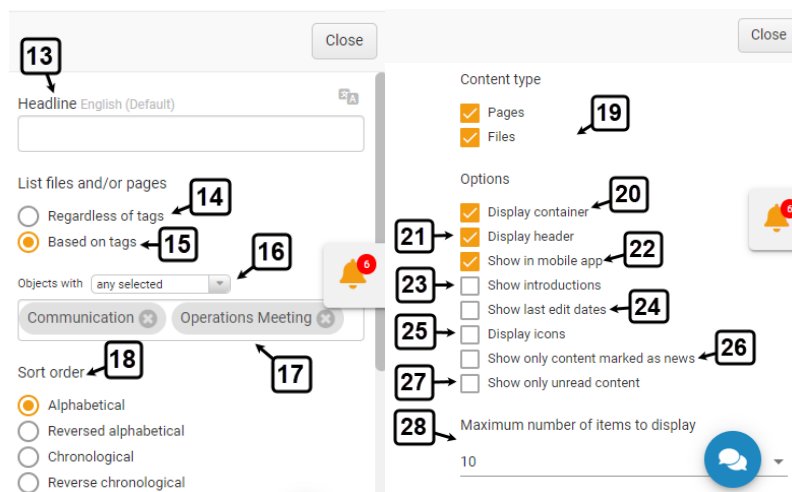
13. Enter a **Headline** for this listing.

14. Select the **Regardless of tags** option under the **List files and/or pages** menu if you want to show all the existing and new files and/or pages on the selected startpage.

15. Select the **Based on tags** option if you want to show the selected files and/or on the selected startpage based on their tags.

16(a). Select the **All tags** option from the **Objects with** dropdown menu if you want to show all the files and/or pages associated with at least one tag.

16(a). Select the **All selected** option from the **Objects with** dropdown menu if you want to show the files and/or pages associated with a particular tag.

16(a). Select the **Any selected** option from the **Objects with** dropdown menu if you want to show the files and/or pages associated with two or more tags.

17. Now, select the **tag(s)** whose associated files and/or pages you want to show on the startpage of the selected brand.

Important Tip: We recommend you should always list the files and/or pages **based on tags** and keep the number of selected tags limited because allowing all the files and/or pages to show in a listing will put too much content on the selected startpage.

18. Choose the **Sort order** in which you want to show the selected files and/or pages on the startpage of the selected brand.

19. Select the **Content type** (**Pages**, **Files** or both) that you want to show in this listing.

Now, proceed to select other **Options** for the files and/or pages in this listing.

20. Select the **Display container** option if you want to display the widget container for this listing.

21. Select the **Display header** option if you want to show the listing headline in this widget.

22. Select the **Show in mobile** app option if you want to show this widget on the homepage of the selected brand in the **Chainformation** mobile app.

23. Select the **Show introductions** option if you want to show a brief introduction of each page in this listing.

Remember, no introduction will be shown for the listed files even if you select the Show introductions option for the listing.

24. Select the **Show last edit dates** option if you want to show the last edit date of each file and/or page in this listing.

25. Select the **Display icons** option if you want to display an icon before the name of each file and/or page in this listing.

26. Select the **Show only content marked as news** option if you want to show only those files and/or pages in this listing which have been marked as news.

When you select this option, then only those files and/or pages will be shown in this listing on the startpage of the selected brand for which the file/page creator has selected the **Show as news on startpage and in app option** in their settings. See the User Guide for **Files** and **Pages**

27. Select the **Show only unread content** option if you want to show only unread files and/or pages in this listing.

When you select this option, then a user will see only those files/pages in this listing on their startpage that they haven't read yet. Whereas, the files and/or pages they have already read will be automatically removed from this listing.

28. Select a **Maximum number of items to display** in this listing.

Note: Choose the maximum number of items to display keeping in mind the number of files and/or pages associated with the selected tags in this listing.

However, we recommend you should not allow the display of more than 10 items in a listing because putting too much content in a single widget could lead to a startpage looking messy.

(c) Table of contents

You can use the **Table of contents** widget to show selected pages and files on the startpage of the selected brand.
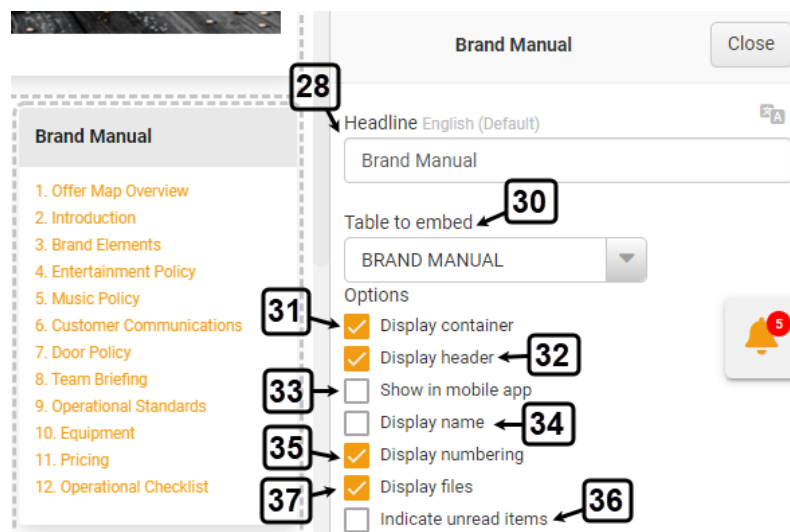
29. Enter a **Headline** for your selected widget. This could be the same as the name of the selected table itself.

30. Select the **Table to embed** in this widget.

Now, proceed to select other **Options** for the files and/or pages in this listing.

31. Select the **Display container** option if you want to display the widget container for this table of contents.

32. Select the **Display header** option if you want to show the table headline in this widget.

33. Select the **Show in mobile** app option if you want to show this widget on the homepage of the selected brand in the **Chainformation** mobile app.

34. Select the **Display name** option if you want to show the table name at the top of its contents.

Important Tip: We recommend you should opt to display only either one of the table header or its name.

35. Select the **Display numbering** option if you want to show the number of each content item in the table before its name.

36. Select the **Display files** if you want to show files from the selected table of contents in this widget.

Note: If you do not select this option, then only the pages from the selected table of contents will be shown in this widget on the startpage.

37. Select the **Indicate unread** items if you want to highlight the unread items in this table.

When you select this option, then the system will highlight the pages and/or files in this table which a user hasn't read yet by making the names of these pages and/or files bold in this widget on their startpage.

(d) Forum listing

You can use the **Forum listing** widget to show all the active forums on the startpage of the selected brand.

When you add a forum listing widget to the startpage structure of a brand, then users associated with it will see all the forums shared with them in this listing on the startpage of their respective user profiles.
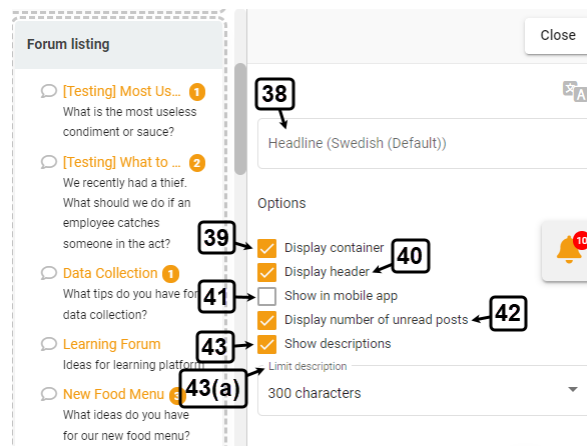
38. Enter a **Headline** for this listing.

39. Select the **Display container** option if you want to display the widget container for this forum listing.

40. Select the **Display header** option if you want to show the listing headline in this widget.

41. Select the **Show in mobile app** option if you want to show this widget on the homepage of the selected brand in the **Chainformation** mobile app.

42. Select the **Display number of unread posts** option if you want to show the number of unread posts in each forum in this listing.

When you select this option, then the system will show the number of posts in each discussion that a user hasn't read yet next to the name of the forum in this widget on their startpage.

43. Select the **Show descriptions** option if you want to show the description of each forum in this widget.

43(a). When you choose to show forum descriptions in the widget, you can set a character limit for these descriptions.

By default, the character limit is set to 300 characters i.e. the system will show the first 300 characters of available descriptions.

You can also set a different limit from options available in the **Limit descriptions** dropdown as follows:

- 100 characters
- 300 characters
- 500 characters
- Unlimited

(e) Feed

You can use the **Feed** widget to show all the posts, news and forum discussions on the startpage of the selected brand.

When you add a feed widget to the startpage structure of a brand, then users associated with it will see all the feed posts shared with them in this widget on the startpage of their respective user profiles.

Discussions in all the forums shared with them could be shown in this widget as well. Furthermore, they can see all the pages, files and forms shared with them as news in this widget.
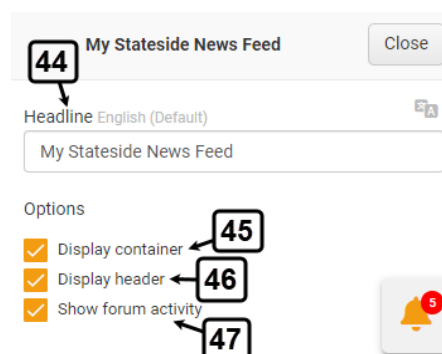
44. Enter a **Headline** for your news feed widget.

45. Select the **Display container** option if you want to display the widget container for your news feed.

46. Select the **Display header** option if you want to show the feed headline in this widget.

47. Select the **Show forum activity** option if you want to show the discussions in forums shared with users in this widget.

Note: If you do not select this option, then no forum activity will be shown in the news feed on the startpage of the selected brand. However, you could still show the forum discussions separately by adding the **Forum feed** widgets on its startpage.

(f) Forum feed

You can use the **Forum feed** widget to show activity in a particular forum on the startpage of the selected brand.

48. Enter a **Headline** for your selected widget. This could be the same as the name of the selected forum itself.

49. From the **Forum listing** menu, select the forum whose activity you want to show in this widget on the startpage of the selected brand.

50. Select the **Display container** option if you want to display the widget container for this forum feed.
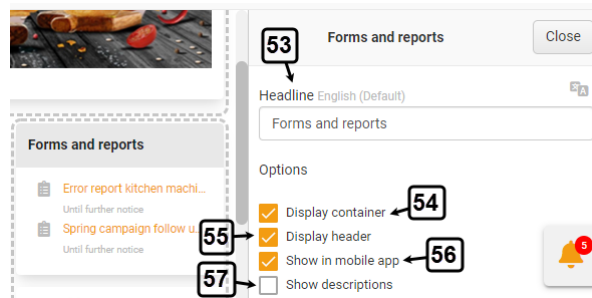
51. Select the **Display header** option if you want to show the forum headline in this widget.

52. Select a **Maximum number of posts to display** in this forum feed.

(g) Forms listing

You can use the **Forms listing** widget to show the selected forms on the startpage of the selected brand.

When you add the forms listing widget to the startpage structure of a brand, then users associated with it will see all the forms from their respective **Forms to answer** tab of the **Forms** module in this listing on the startpage of their respective user profiles.

53. Enter a **Headline** for your forms listing.

54. Select the **Display container** option if you want to display the widget container for this listing.

55. Select the **Display header** option if you want to show the listing headline in this widget.

56. Select the **Show in mobile app** option if you want to show this widget on the homepage of the selected brand in the **Chainformation** mobile app.

57. Select the **Show descriptions** option if you want to show the description of each form in this listing.

58. Once you have added all the required widgets to the selected startpage structure, preview its appearance for different devices by hovering your mouse on the **Desktop**, **Tablet**, **Smartphone** options under the **Devices** menu on the **Appearance** page.

Remember, when you do not select the **Show in mobile app** option for a widget, then this particular widget and items in it will be shown on the startpage of the selected brand on desktop and tablet devices but will not be visible on its homepage in the **Chainformation** mobile app.

59. After previewing the selected startpage appearance, click the **Save** button in the top-right corner of the **Appearance** page to save all the changes you have made.
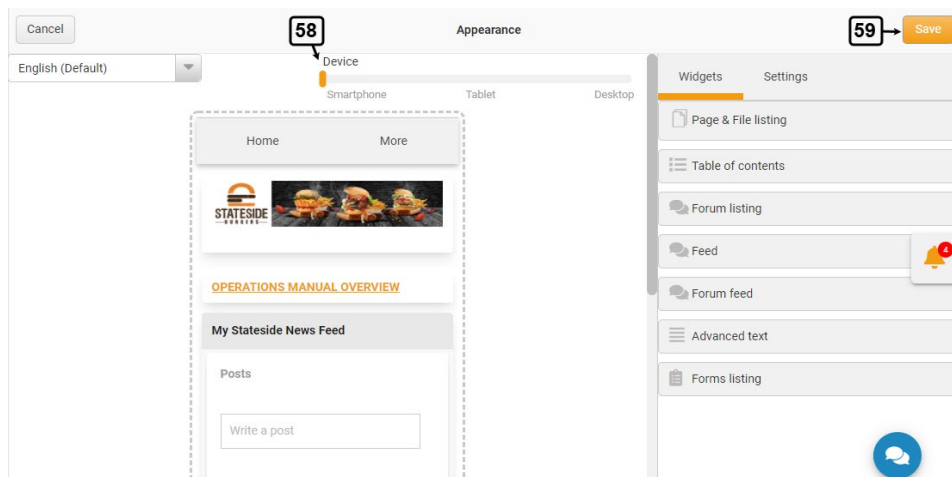
This will redirect you to the settings page of the selected brand.

Manage Sidebar Settings of a Brand

1. On the settings page of the selected brand, click the **Sidebar settings** widget to manage its Pages and Files sidebar.

This will open the **Appearance** settings of the Pages and Files Sidebar of the selected brand.

On this page, you can add new widgets to the pages and files sidebar or edit the existing widgets.
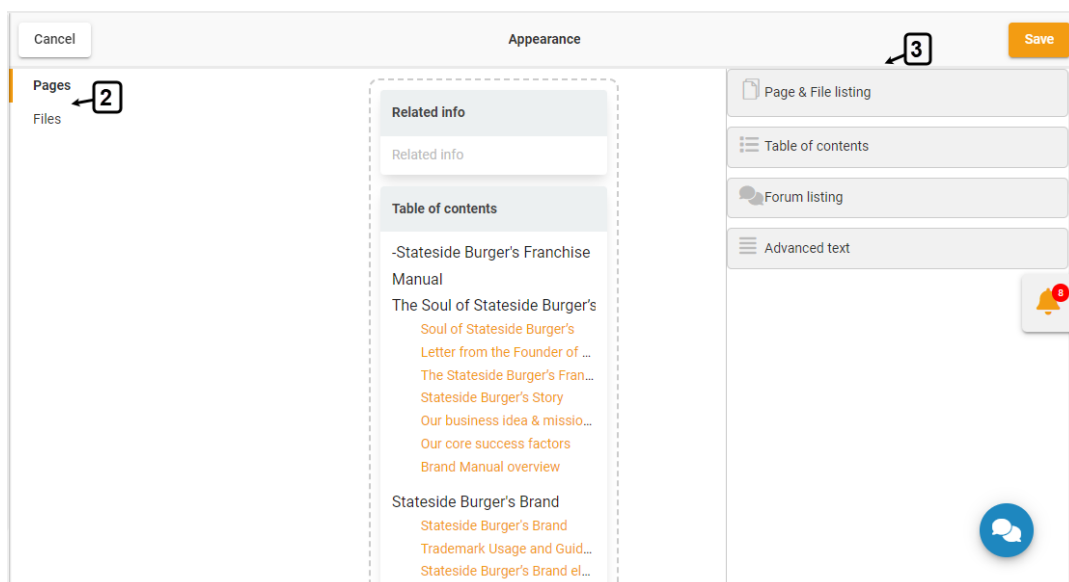
2. Click the module name (**Pages/FIles**) on the left side of the Appearance page whose sidebar settings you want to review or edit for the selected brand.

3. Drag your required widgets to the selected sidebar from available items on the right side of the **Appearance** page.

You can add the following 4 widgets to the sidebar of your pages and files.

- Page and file listing

- Table of contents

- Forum listing

- Advanced text

4. You can customise the content in these widgets as demonstrated in the previous section. See the User Guide for **Startpage Design of a Brand**

Furthermore, the tags options for the **Page and file listing** widget are extended to make it compatible for the **related info** listing.
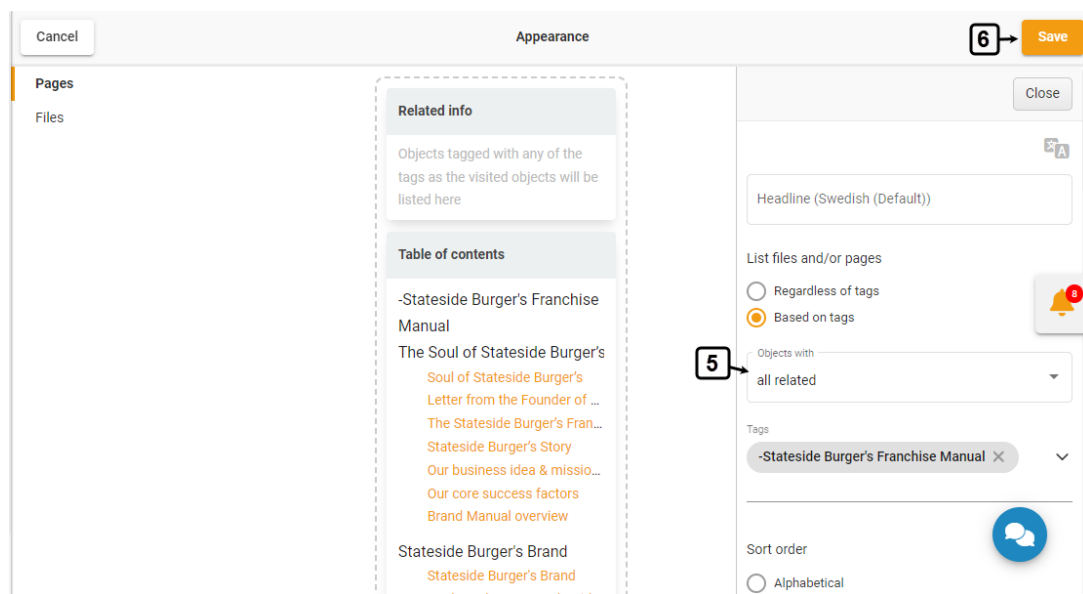
5. You should list files and/or pages **based on tags** in the sidebar listing and select the **all related** or **any related** option from the **Objects with** dropdown menu.

This will show the pages or files associated with any of the tags as the visited page/file when the users will open a page or file. In this way, the relevant items of a page or file will always be visible for the users associated with the selected brand in the sidebar of the selected page/file.

6. Once you have added and customised all the required widgets to the Pages and FIles sidebar of the selected brand, click the **Save** button in the top-right corner of the page to save all the changes you have made.

This will redirect you to the settings page of the selected brand.

You can review the recent changes you have made to the Pages and FIles sidebar of a brand by clicking the **Sidebar settings** widget again on its settings page.

Manage List View Settings of a Brand

1. On the settings page of the selected brand, click the **List view settings** widget to manage list view settings of Pages, Flies, and Our organisation modules for this brand.

This will open the **Appearance** page for List view settings where you can manage list view of objects in the **Pages**, **Files** and **Our organisation** modules for the selected brand on their respective tabs.
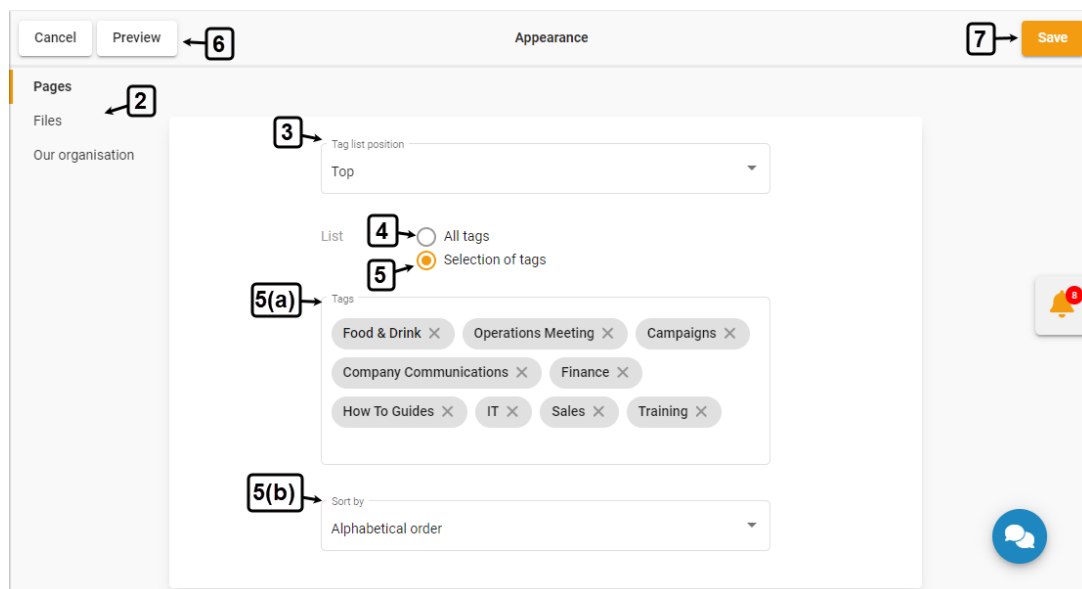
2. Click the **module name** on the left side of the Appearance page whose list view settings you want to review or edit for the selected brand.

3. Select an appropriate option from the **Tag list position** menu to decide whether the tags for the selected module will be listed at the **left** side of its objects list or at the **top** of the objects.

4. Select the **All tags** option next to the **List** menu if you want to show all the tags created for the selected module with its objects list.

5. Select the **Selection of tags** option if you do not want to show all the tags created for the selected module with its objects list.

5(a). Select the **tags** that you want to show with the objects list of the selected module.

5(b). Select whether you want to **sort** the selected tags **alphabetically** or **manually** in the selected module.

Important Tip: We recommend you should opt to list **All tags** for each module so that the users can access all of its relevant tags quickly.

6. Click the **Preview** button in the top-left corner of the page to preview the changes for the selected module.

7. Once you have made all the required changes and previewed the updated list view of each module, click the **Save** button in the top-right corner of the page to save all the changes you have made.

This will redirect you to the settings page of the selected brand.

Create a New Brand Profile

Follow the navigation steps demonstrated below to create a new brand profile or clone an existing brand.
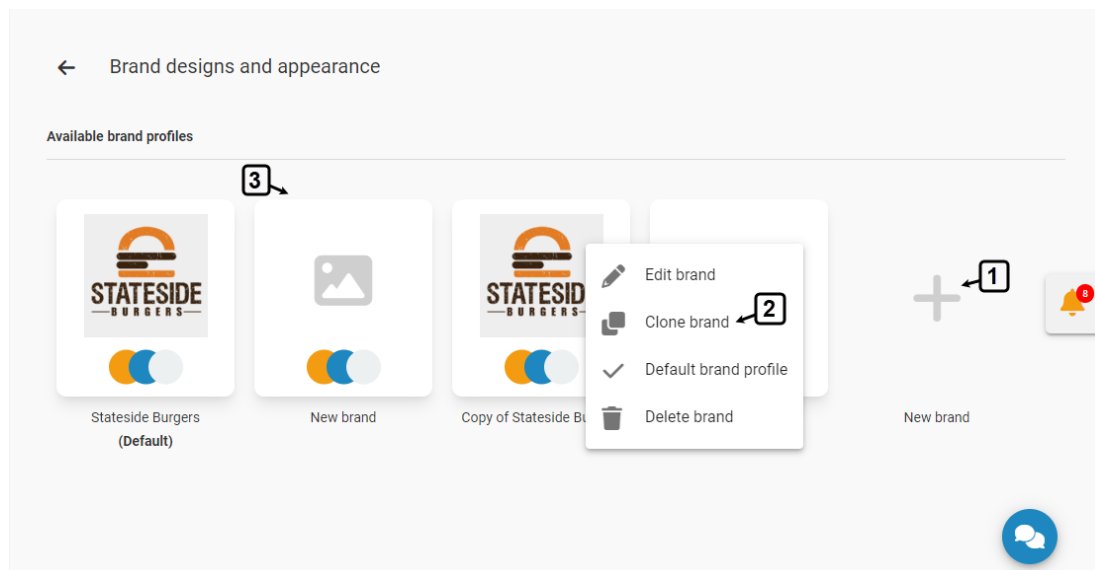
1. To create a new brand profile, click the **New brand** (✚) widget on the **Brand designs and appearance** page.

Once you click the New brand widget, the system will create a new brand profile with default settings for Brand colors, Startpage, etc.

2. You can also create an exact copy of an existing brand by selecting the **Clone brand** option from its drop-down menu on the **Brand designs and appearance** page.

When you choose to clone a brand, the system will create a brand profile named as Copy of the selected brand with all settings same as of the cloned brand.

3. You can change settings of the new brand and update its logo on its settings page as demonstrated in the previous section. See the User Guide for **Edit Brand Design and Appearance Settings**

Note: If you clone the default brand, its background image will be copied to the new brand but will not be visible on its settings page unless you made it your default brand profile. See the User Guide for **Change Your Default Brand Profile**

Change Your Default Brand Profile

To set a brand as your default brand profile, click the the **Default brand profile** option from its drop-down menu on the **Brand designs and appearance** page.
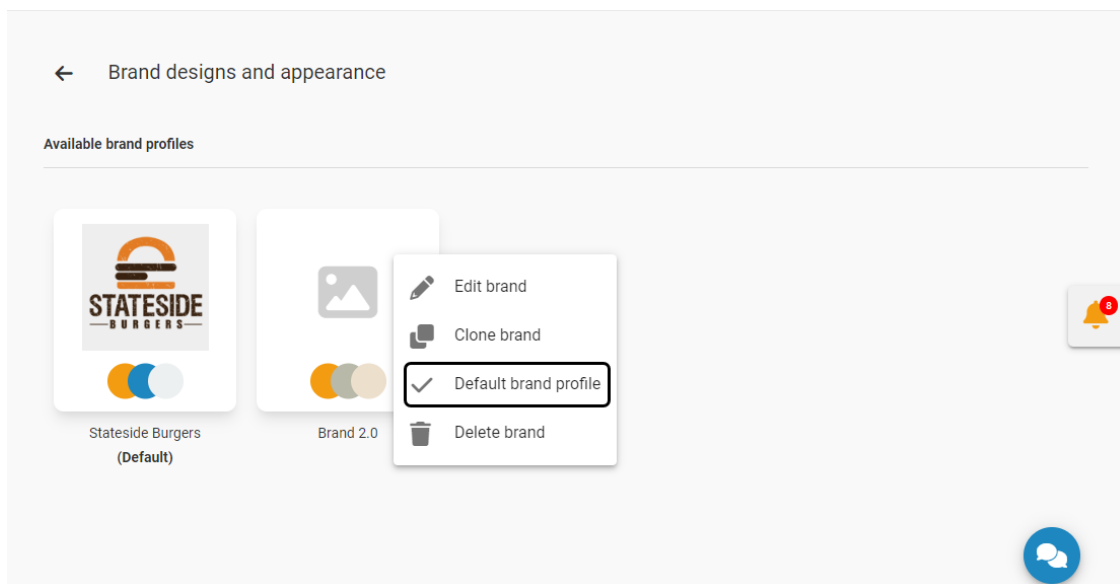
Note: If a background image already exists for the selected brand, then the system will auto fetch that background image and use it for the login page of your organisation's internet. Otherwise, the new default brand will have no background image immediately.

Nonetheless, you can add a new background image for the selected brand or update the existing one on its settings page. See the User Guide for **Edit Brand Design and Appearance Settings**

Delete a Brand

Remember, there is no **Trash** folder for the **Brand designs and appearance** module on the **Chainformation** platform from which you can restore a deleted brand profile. Therefore, when you delete a brand, the system deletes all the information related to it permanently.

Now, follow the navigation steps demonstrated below to delete a brand and learn what happens to business areas associated with a brand when you delete it.

1. To delete a brand, click the the **Delete brand** option from its drop-down menu on the **Brand designs and appearance** page.
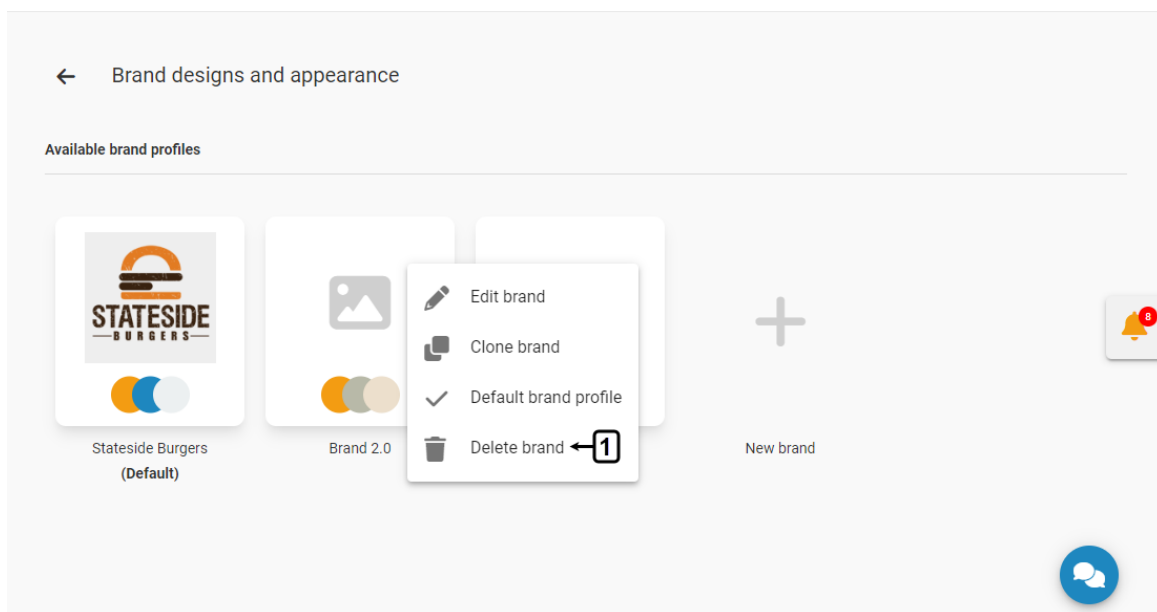

Note: You cannot delete your default brand. So, the Delete brand option is disabled in the drop-down menu of the default brand.

2. The system shows the normal confirmation dialogue when the selected brand is not associated with any business area.
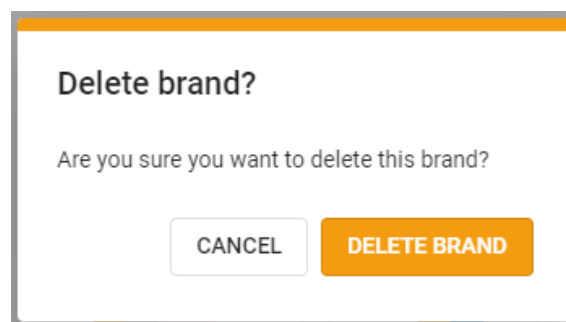
3. If the selected brand is associated with one or more business areas and it is the only non-default brand, then business areas associated with it will be assigned to your default brand on deleting the selected brand.
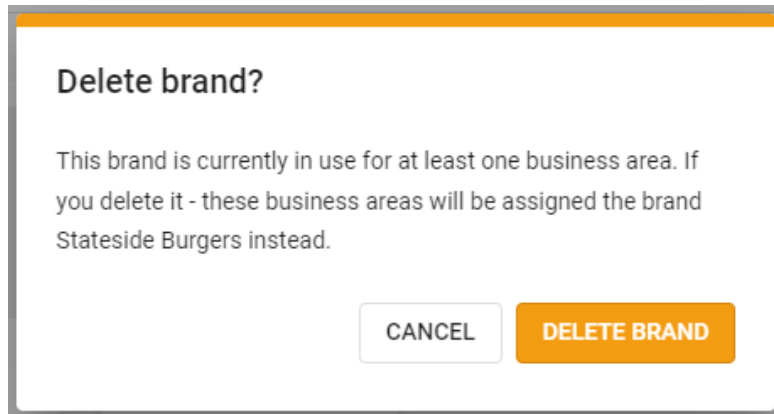
4. If the selected brand is associated with one or more business areas and it is not the only non-default brand i.e. you've at least one more brand other than the default and selected brand.

Then, you have to select a new brand for the business areas currently associated with the selected brand before you can delete it.
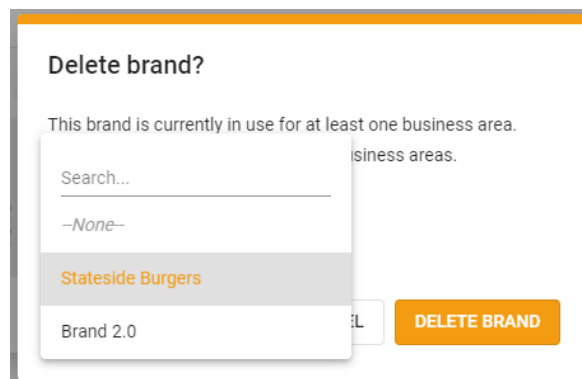
5. Click the **DELETE BRAND** button from the dialogue shown on the screen to delete the selected brand.