

Chainformation Admin User Guide (Page Templates)

Last Updated: March 31, 2023

Welcome to the **Chainformation** user guide. In this manual, we will learn how to create new page templates and manage your saved templates.

Chainformation allows you to create pre-formatted page templates with some basic structures and content blocks. These templates offer you a quick and straightforward customization of your content on **Chainformation** pages. You can use these templates to create and edit a page by adding rich content like text, media files and table of contents to them.

Remember, a page template serves as a real-time platform and editing a template will also **affect all pages** that have been created using this template. For example, when you delete a content block from a page template, this will also delete that block and all of its related content on all pages that have been created using this template.

NOTE to SUPER ADMIN: You must first make the proper settings for the **Page manager - Local and Central** functions in your **system setup** to control which **Roles** in your organisation are allowed to create new page templates and manage existing templates. [See the User Guide for Roles Administration](#)

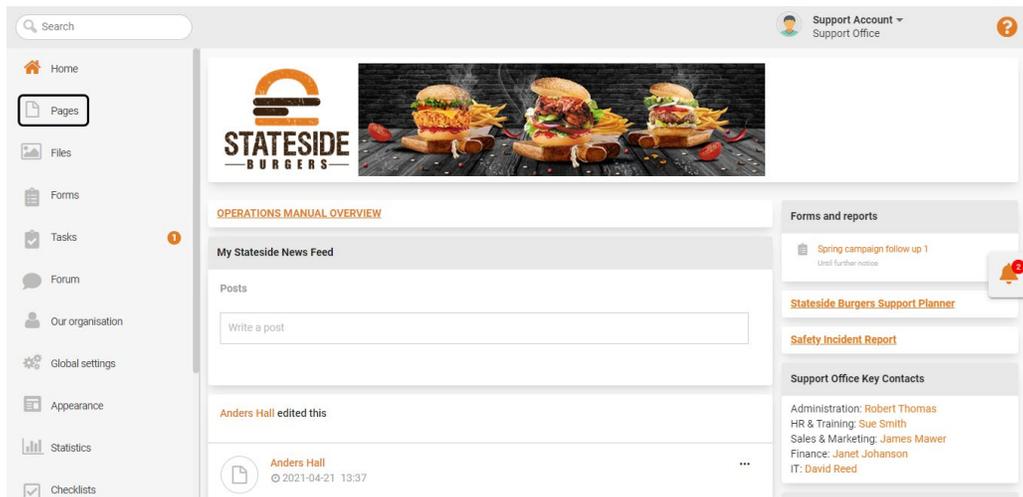
Here is a list of all the features of the **Templates** module that we will discuss in this manual.

Create a New Template	2
Manage Saved Templates	Fel! Inget bokmärkesnamn angivet.
Review Existing Templates	8
Review a Template Formatting.....	10
Edit a Template.....	11
Delete a Template.....	12
Manage Templates in Trash	13
Restore a Deleted Template.....	14
Delete a Template Permanently	14

Create a New Template

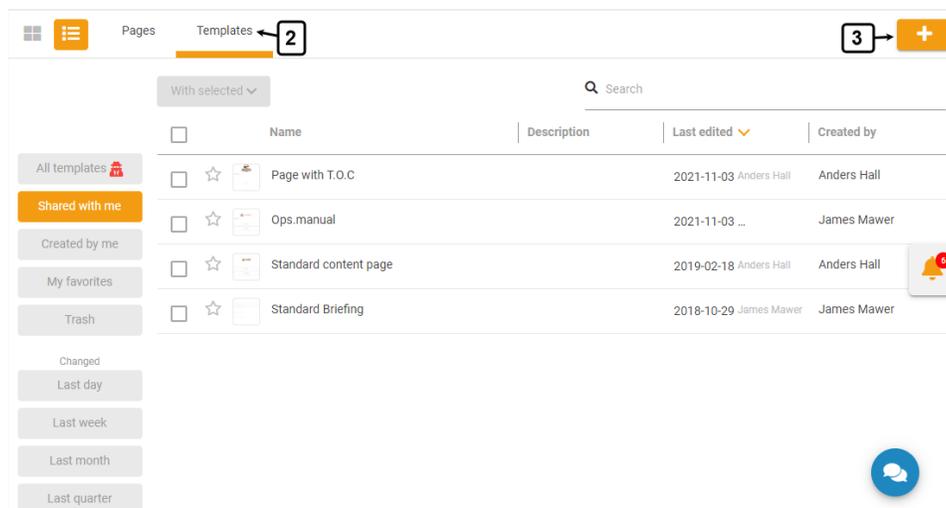
Once you have logged in to the **Chainformation** platform then follow these navigation steps to **create a new page template**.

1. Click the **Pages** button in the left-side menu to open the **Pages** tab.



Note: You cannot create or edit **Templates** on the **Chainformation** mobile app. Therefore, you must log in to the **Chainformation** website platform to create a new template or edit a saved template.

By default, you will be redirected to the **Pages** tab.



2. Click the **Templates** button to open the **Templates** tab.

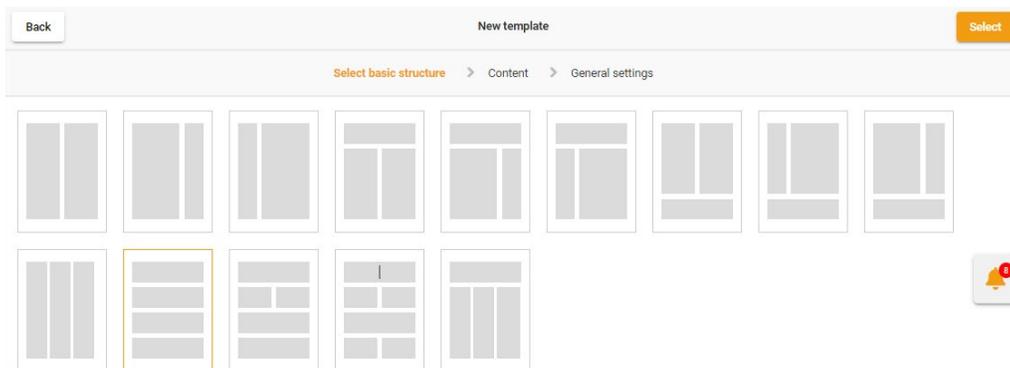
3. Click the (+) icon in the top-right corner of the **Templates** tab to create a new template.

This will open the **New template** tab.

On the **New template** tab, follow the navigation steps demonstrated below to create a new template.

4. Select a **basic structure** for your new template.

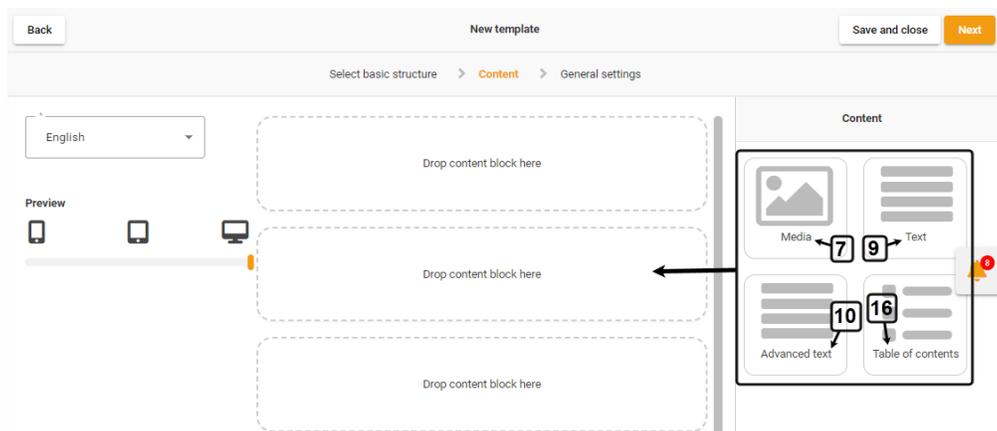
The selected template is the one that is the most popular among Chainormation customers.



Now, proceed to add **content blocks** in placeholders of your selected structure on the **Content** tab of the **New template** page.

On the **Content** tab, you can drop the following four types of content blocks from the **Content** menu to placeholders of your selected structure.

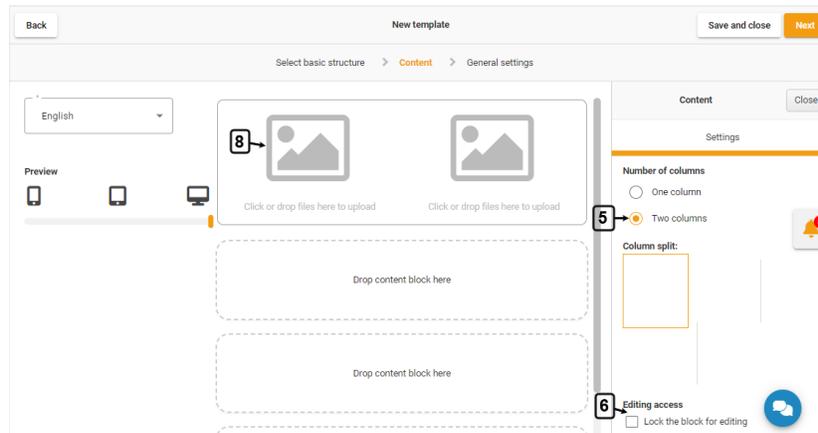
- i. Media
- ii. Text
- iii. Advanced text
- iv. Table of contents



By default, you can insert only one content item in a content block.

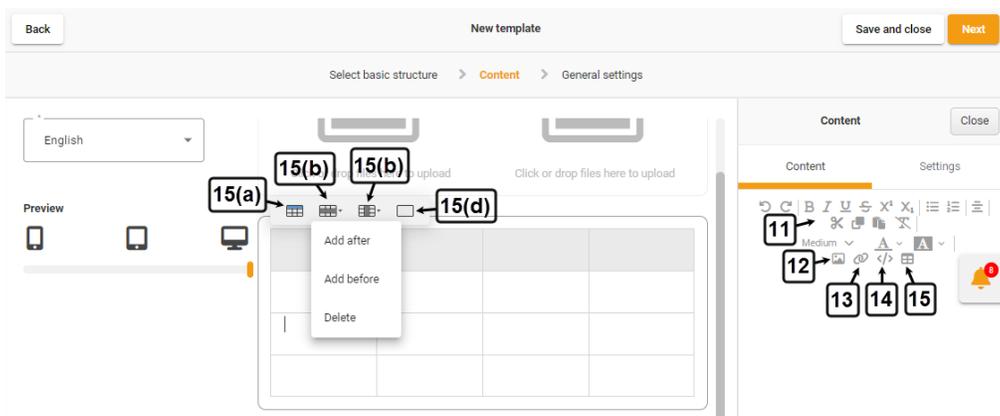
5. However, you can insert two content items in a block by selecting the **Two column** arrangement from its settings.

6. You can restrict your colleagues from editing a content block by checking the checkbox next to the **Lock the block for editing** option under the **Editing access** heading.



7. You can drop one or more **Media** blocks to a content placeholder.

8. Instead of creating a generic **Media** block, you can upload an image or video from your device or **Chainformation file manager** to this block by clicking the **Attachment** icon. [See the User Guide for Files](#)



9. You can drop one or more **Text** blocks to a content placeholder.

10. You can drop one or more **Advanced text** blocks to a content placeholder.

Note: Text editor of an **Advanced text** block has more text formatting options as compared to that of a simple **Text** block.

Here is a brief summary of typographical and attachment options offered with the **Advanced text** block.

11. You can **format** your text using various typographical options given in the **header menu** of the selected **text block**.

12. You can insert a file from the **Files** tab or upload it from your device in the text block.

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

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

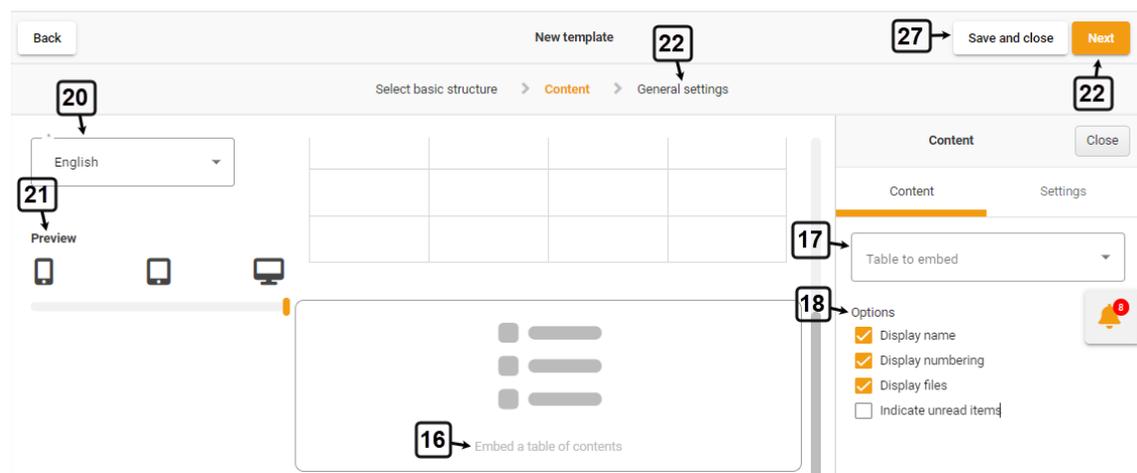
15. You can **insert** a **table** to show content in rows and columns in an **Advanced text** block.

15(a). You can enable the **table header** by clicking the first table option.

15(b). You can **add** a **row after** an existing **row, before** it and **delete** the selected **row** from the row options.

15(c). Similarly, you can **add** a **column** after an existing **column, before** it and **delete** the selected **column** from the column options.

15(d) You can **delete** the entire **table** by clicking the last table option.

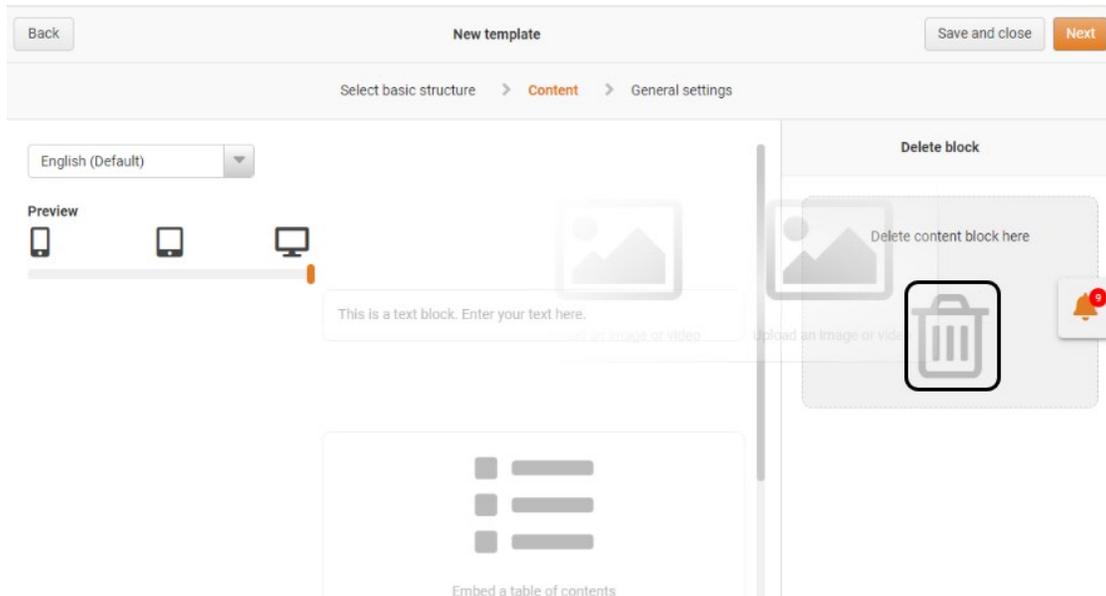


16. You can drop a **table of contents** block to a content placeholder.

17. You can also **embed** a **table of content** from the dropdown menu under the **Table to embed** field in a placeholder instead of creating a generic content block for it. [See the User Guide for Table of contents](https://chaininformation.com/userguides)

18. Select appropriate **Display Options** for the table of content you have embedded.

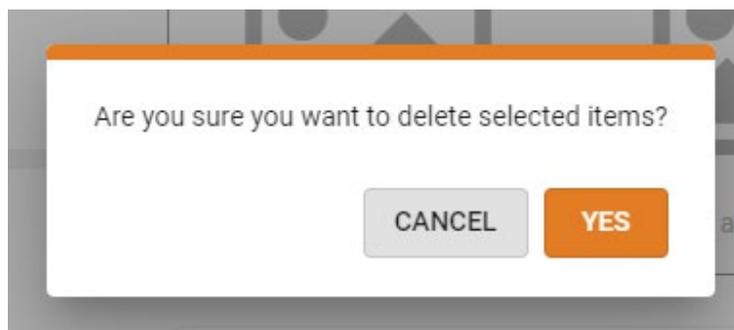
19. You can delete a content block by dragging it to the **Trash** icon in the **Delete block** field on the left side of the page.



NOTE: BE VERY CAREFUL WHEN DELETING A CONTENT BLOCK FROM A TEMPLATE. IF THERE ARE ANY PAGES USING THIS TEMPLATE, YOU WILL LOSE ALL CONTENT ON ALL PAGES RELATED TO THIS BLOCK. THIS ACTION CANNOT BE REVERSED.

You can however move existing, and add new blocks to a Template with no risk.

19(a). Click the **YES** button in the pop-up message shown on the screen to confirm your action.



20. Select the default **content language** for the new template from the dropdown menu provided in the top-left corner of the **Content** tab.

21. Check the **Preview** of the new template for the **smartphone**, **tablet** and **desktop** devices.

22. Once you have entered and reviewed all the information on the **Content** tab of the **New template** page, proceed to define **General settings** for the new template.

You can also open the **General settings** tab by clicking the **Next** button in the top-right corner of the **Content** tab.

23. On the **General settings** tab, enter a **Name** of the **New template**.

24. Write a **Description** of the **New template** (if applicable).

Remember, a template name and description should reflect information about its scope i.e. the type of pages for which it can be used.

25. You can write the name and description (if any) of a page template in different available **content languages**.

26. Select a **Sharing selection** for the new template. [See the User Guide for Sharing Selection](#)

Note: The sharing selection on a Template does NOT affect who can read the content of your Pages, it will only govern which Admins will be able to use/load this template.

Important: Once you have formatted the new template, carefully review all the information on the **Content** and **General settings** tabs. Make sure that the basic structure of the new template, all content blocks and their relevant content are compatible with your requirements and you will not need to edit them later.

Remember, a page template serves as a real-time platform and editing a template will also affect all pages that have been created using this template. **For example, when you delete a content block from a page template, this will also delete that block and its related content on all pages that have been created using this template.**

27. Click the **Save** button in the top-right corner of the **General settings** tab or the **Save and close** button in the top-right corner of the **Content** tab to save the new template.

This template will be available to all users with whom you have shared it. Now, you and your selected colleagues can use this template to create new pages.

Manage Saved Templates

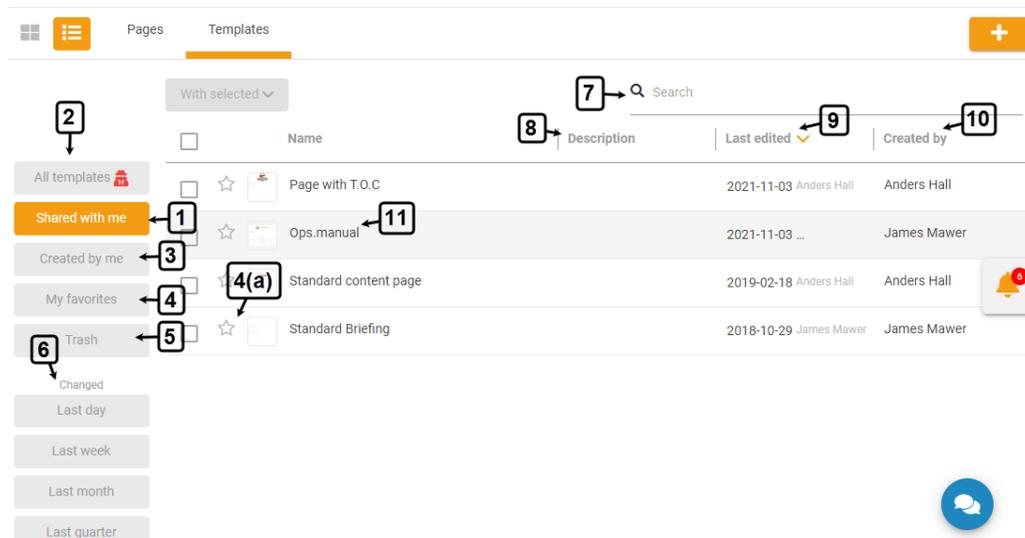
On the **Templates** tab, you can **view** and **manage** the templates created by you and your colleagues.

In this section, we will discuss the following features of the **Templates** tab.

- Review Existing Templates
- Review a Template Formatting
- Edit a Template
- Delete a Template

Review Existing Templates

Once you have opened the **Templates** tab as demonstrated in the previous section, you can view different templates under the following categories.



1. Shared with me

By default, you will be redirected to the **Shared with me** tab. This tab contains all the templates created by you and the templates your colleagues have shared with you.

2. All templates

Super Admin can view and manage all the templates created across your organisation's internet in the **All templates** tab. As a Super Admin, you can access even those templates from this tab which have not been shared with you.

Remember, you still cannot use the templates which are not shared with you to create pages even if you are a Super Admin. You can use these templates only if you or one of your colleagues has shared them with you by editing their sharing selection. See the User Guide for **Sharing Selection**

Note: Only those users can access the **All templates** tab who are associated with the roles which have been assigned the **Super Admin** right for the **Page manager - Central** function in the **System setup** of your organisation. See the User Guide for **Roles Administration**

3. Created by me

Created by me tab contains only those templates that have been created by you.

4. My favorites

My favorites tab contains the templates that you have marked as favorites.

4(a) **Note:** You can **mark/unmark** a template as **favorite** by clicking the **Star** icon next to its name on the **Templates** tab.

5. Trash

Trash folder contains the templates that have been deleted by you or your colleagues from the **Templates** page. See the User Guide for **Trash**

6. View Templates based on the Edit History

On the **Templates** tab, you can also view templates based on their edit history i.e. when they were last edited. **Chainformation** categorise all templates on the **Templates** tab under the following four periods:

- i. Last day
- ii. Last week
- iii. Last month
- iv. Last quarter (3 months)

You can access these categories under the **Changed** heading in the left-side menu of the **Templates** tab.

7. Search a Template

You can also use the **Search** field to find a template based on any of the available data/information. [See the User Guide for Search](#)

8. Under the **Description** heading, you can view a brief description (if available) of all the templates listed under different categories on the **Templates** page.

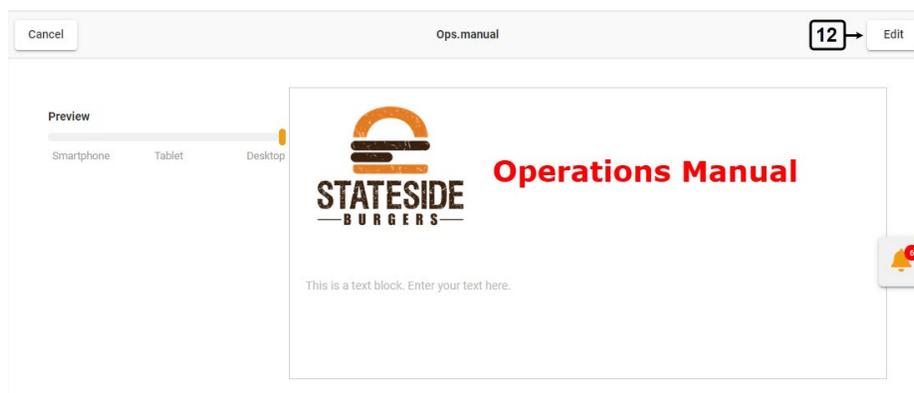
9. Under the **Last edited** heading, you can view when and who has last edited a particular template.

10. Under the **Created by** heading, you can view who has created a listed template.

Review a Template Formatting

11. You can review the basic structure of a template, its content blocks, its preview for smartphone, tablet and desktop devices by clicking its name on the **Templates** tab.

This will open the **Details** tab of the selected template where you can review its formatting details.



12. You can edit a template by clicking the **Edit** button in the top-right corner of its **Details** page.

This will open the Edit template page for the selected template page where you can edit its formatting, settings or both.

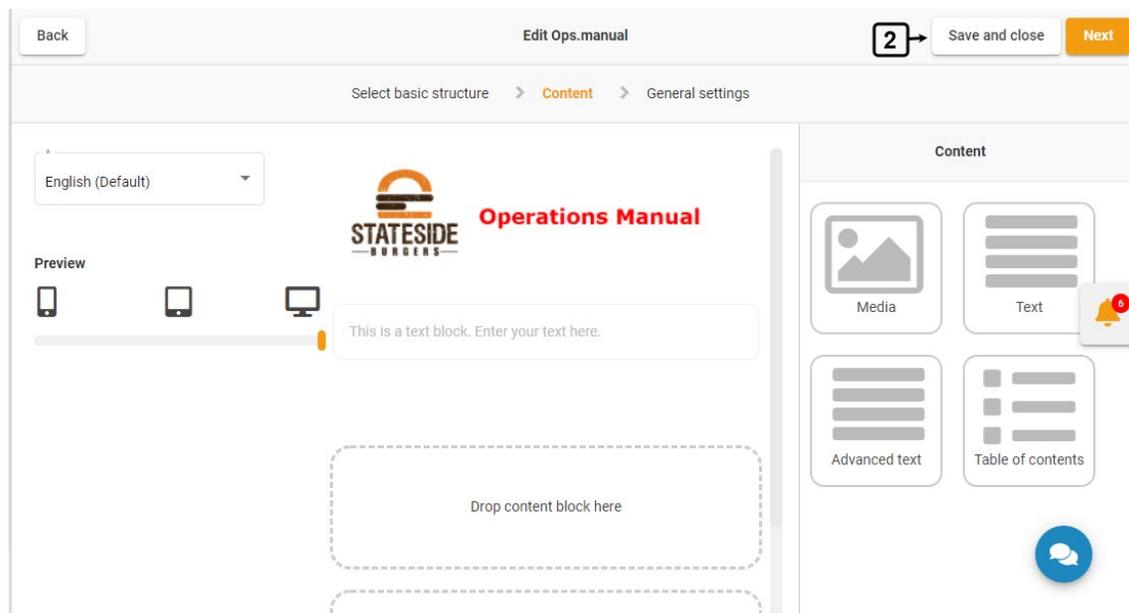
Edit a Template

1. On the **Edit template** page, update the details you want to edit in **basic structure**, **content** or **general settings** of the selected template.

Remember, a page template serves as a real-time platform and editing a template will also affect all pages that have been created using this template. For example, when you delete a content block from a page template, this will also delete that block and its related content on all pages that have been created using this template.

Therefore, we strongly advise against changing the basic structure of a template or making unnecessary changes in its content blocks once you have created pages using this template. It may lead to the loss of some precious data on the respective pages.

2. Click the **Save and close** button in the top-right corner of the **Content** tab or the **Save** button in the top-right corner of the **General settings** tab of the **Edit template** page to save all the changes you have made.

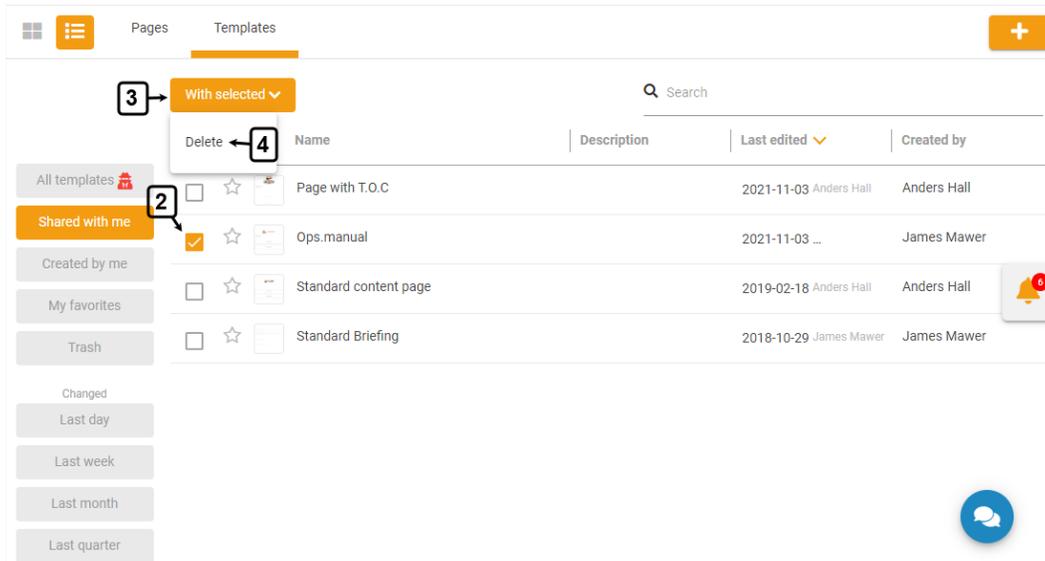


The system will save the updated template and also update all pages you have created using this template.

Delete a Template

Remember, when you delete a template, this will also delete all pages that have been created using this template. Therefore, make sure that you have saved the data on pages associated with a template before deleting it.

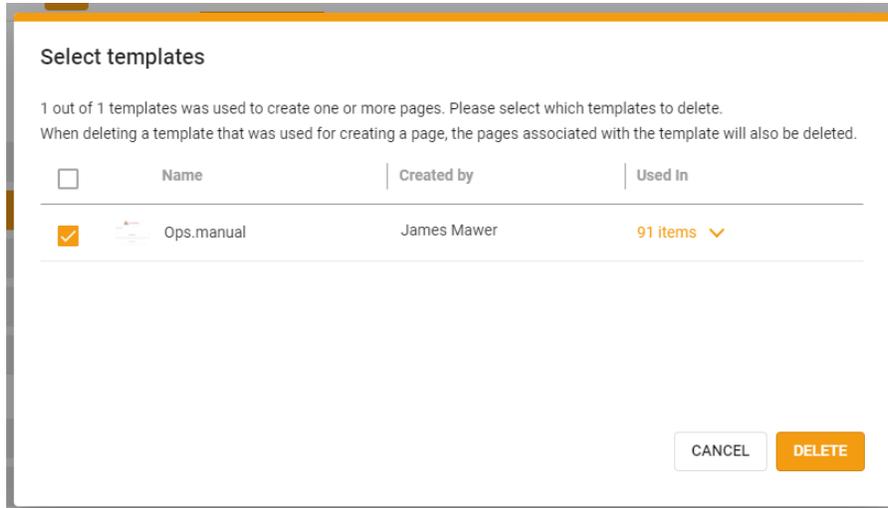
Now, follow the navigation steps demonstrated below to delete a template and the pages associated with it if you really need to do so.



The screenshot shows the 'Templates' tab in the ChainInformation application. A table lists templates with columns for Name, Description, Last edited, and Created by. The 'Ops.manual' template is selected, and a 'With selected' dropdown menu is open, showing the 'Delete' option. A search bar and a '+ Add' button are also visible.

	Name	Description	Last edited	Created by
<input type="checkbox"/>	Page with T.O.C		2021-11-03 Anders Hall	Anders Hall
<input checked="" type="checkbox"/>	Ops.manual		2021-11-03 ...	James Mawer
<input type="checkbox"/>	Standard content page		2019-02-18 Anders Hall	Anders Hall
<input type="checkbox"/>	Standard Briefing		2018-10-29 James Mawer	James Mawer

1. Open the **Templates** tab by following the navigation steps as demonstrated in the previous section.
2. On the **Templates** tab, **check the checkbox** next to the name of the page or templates you want to delete.
3. Click the **With selected** button above the list of templates.
4. Click the **Delete** option from the **With selected** dropdown to delete the selected templates.
5. Select the template or templates you want to delete and click the **DELETE** button in the pop-up message shown on the screen to delete the selected templates.



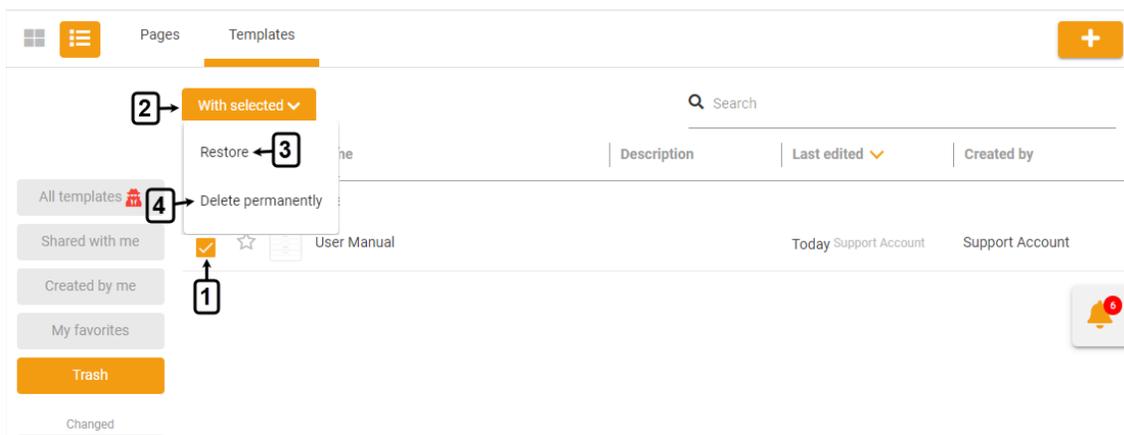
Note: When you **delete** a template, the system will move the deleted template and all pages associated with it to the **Trash** folder of the **Templates** and **Pages** modules respectively.

You can **restore** a deleted template and page from **Trash** later (if required). [See the User Guide for Trash](#)

Manage Templates in Trash

Every **Chaininformation** platform has a designated **Trash** folder for the **Templates** module from where you can restore a deleted template or delete it permanently.

To **restore** a deleted template or **delete** it **permanently**, open the **Trash** folder on the **Templates** tab and follow the navigation steps demonstrated below.



1. **Check** the **checkbox** next to the name of the template or templates you want to restore or delete permanently.
2. Open the **With selected** menu provided above the list of templates.

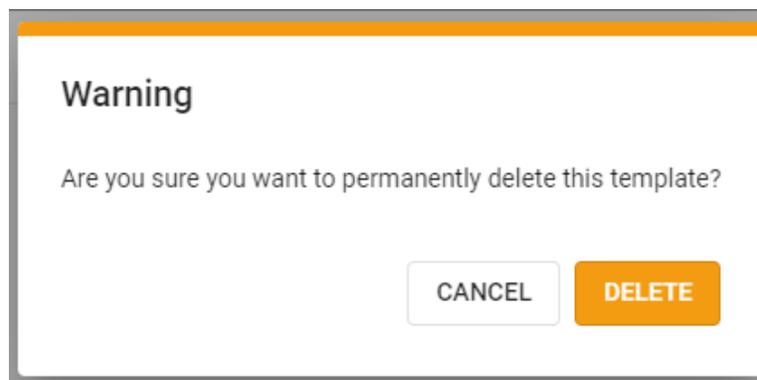
Restore a Deleted Template

3. Select the **Restore** option in the **More** menu to restore the selected templates and move them back to their respective category on the **Templates** tab.

Note: When you restore a template, it will not automatically restore the pages associated with it. You will have to restore them manually from the **Trash** folder of the **Pages** module. [See the User Guide for Trash \(Pages Module\)](#)

Delete a Template Permanently

4. Select the **Delete permanently** option in the **More** menu to delete the selected template and all pages associated with it permanently.
5. Click the **DELETE** button in the pop-up message shown on the screen to confirm your action.



Remember, you cannot retrieve a template and the pages associated with it once you have deleted it permanently from the **Trash** folder.