

Chainformation Admin User Guide

(Pages)

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

Chainformation allows you to create, share and customise the content related to your organisation by creating pages. The module **Pages** is like a built-in online document editor, a “Word-light”. It does not require any other software or plugins and content can be created and edited from any platform and device.

Every **Chainformation** platform has various pre-formatted page templates with some basic structures and content blocks. These templates offer you quick and straightforward customization of your content on the **Chainformation** platform. You can create a page by adding rich content like text, media files, and a table of contents to a pre-formatted template. Moreover, you can quickly access the pages shared by you and your colleagues using various built-in document filters.

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 pages and manage existing pages. [See the User Guide for Roles Administration](#)

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

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When to Use the Pages Module

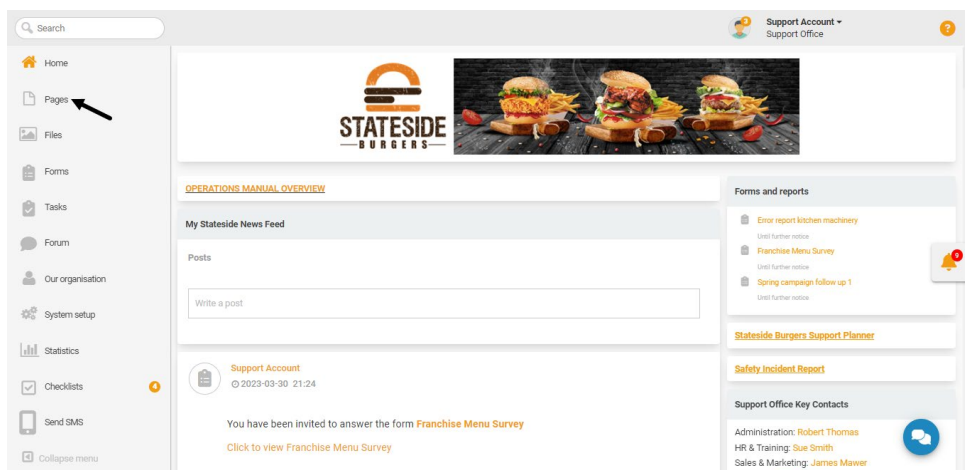
When you have a message or information of more than a short sentence, or when it's important that you can track and monitor the reading in detail, you should create a Page.

For short instant messages you can share a Post or use the **Chat** module. Also, for **Pages** the **Search** feature is enhanced compared to **Posts** and **Chat**.

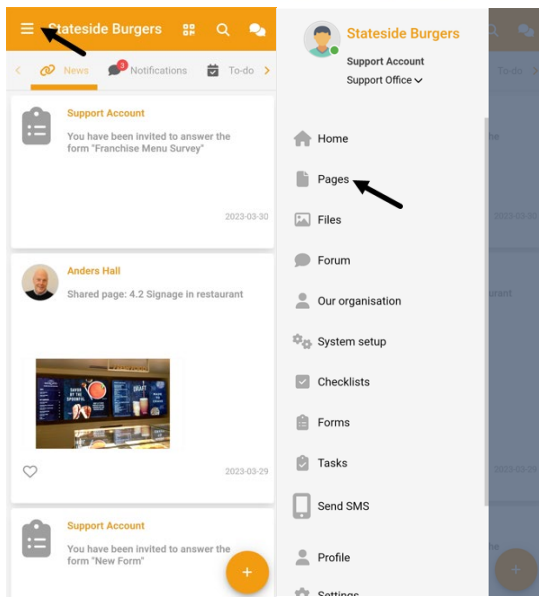
Create a New Page

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

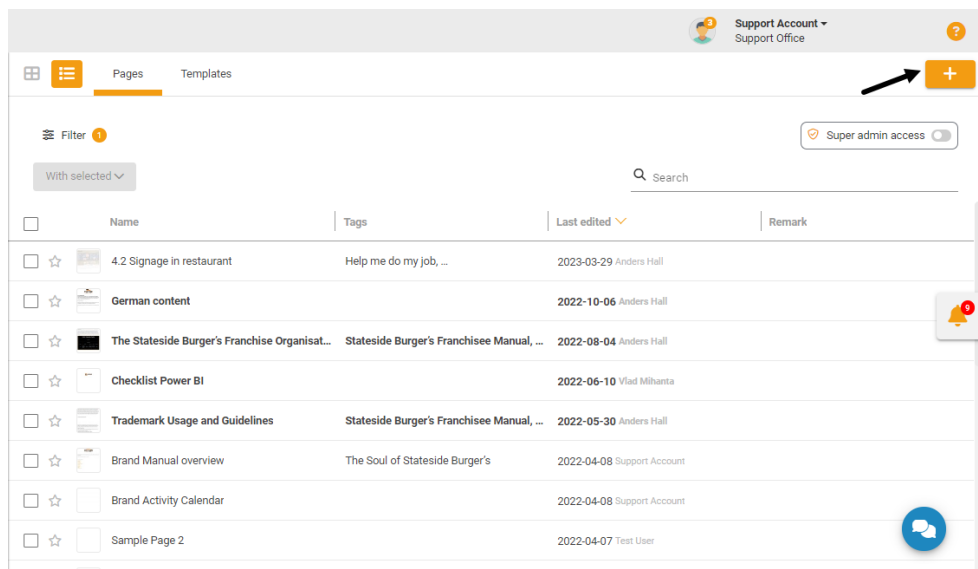
1. Click the **Pages** button in the left-side menu to open the **Pages** tab.



If you are accessing the platform from the **Chaininformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.



2. Click the (+) icon in the top-right corner of the **Pages** tab to create a new page.



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

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

3. Enter a **Page name**. This is the equivalent to “Save as...” on your computer, and should be clear, descriptive and relevant to the content.

4. Select a **Page template**.

Note: You should have at least one pre-formatted template to create a page, otherwise, you cannot create the new page. See the User Guide for **Page Templates**

Furthermore, select the page template very carefully because once you have added content to the Page, the Template can no longer be changed.

4(a). You can set your selected template as the **default template** by checking the checkbox next to the **Set as default** option. Now, the system will automatically use this template as the default template for every new page. You can still manually select any **Template**.

5. Select one or more **Tags** to describe the new page. See the User Guide for **Tags**

Now, select the appropriate options in the **Optional settings** under the **Settings** section.

6. Check the checkbox next to the **Show as news on startpage and in app** option if you want to share the Page as an automatic News update on the start page and as a push notification in the mobile app for the selected users.

7. Check the checkbox next to the **Allow comments** option if you want to allow comments on the page.

This will open up a “chat window” on the selected page for interaction with readers.

8. In the **Sharing settings**, select the **Not shared** option if you want to create the page for your personal use only and do not want to share it with any other user in your organisation, or keep it as a draft while working on it.

9. If you want to share the new page with your colleagues, select the **Continuous** option and set a **Start date** when the page will be available to the selected users in your organisation. Now the Page will be available forever, until it’s manually changed.

10(a). If you want to share the page with your colleagues for a definite period, select the **Time limited** option.

10(b). Set a **Start date** when the page will be available to the selected users in your organisation.

10(c). Set an **End date** when the page will be no longer available to the selected users in your organisation.

10(d). Select the **Delete page** option if you want to delete the page after the **End date**.

10(e). Select the **Unpublish page** if you want to only archive/unpublish the page after the **End date** and do not want to delete it. It will now only be available for you as the Page Owner.

11. You can set the options selected in the **Settings** as the default options by checking the checkbox next to the **Set as default** option. Now, the system will automatically use these settings as the default optional and sharing settings for every new page.

However, you can still modify these settings for a particular page.

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

Note: A Sharing selection will be effective only if you have selected the **Continuous** or **Time limited** option.

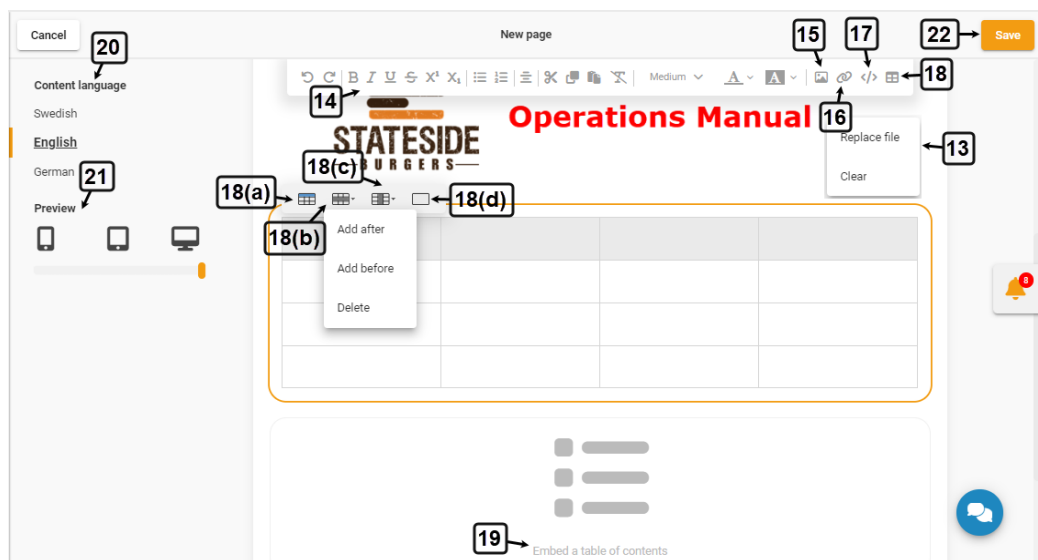
If you have selected the **Not Shared** option, then the page will be shared with no other users in your organisation regardless of the sharing options you have selected in the **Sharing selection** field.

Now, proceed to add text, files, and other relevant content to your selected template.

Chainformation allows you to edit the selected template according to your page requirements. However, you cannot edit those blocks of a template that have been **locked**

for editing by the user who has created that template. See the User Guide for **Page Templates**

Here is a brief summary of all the changes that you can make to template blocks that are open for editing.



13. You can **replace** or **clear** a **file** from the **media** section of your selected template. (if applicable)

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

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

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

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

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

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

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

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

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

Note: You may not be able to see all the above-mentioned features in the text editor of a text block if that block includes a simple Text widget instead of the Advanced text widget. [See the User Guide for Page Templates](#)

19. You can **embed** a **table of content** to the page. See the User Guide for **Table of contents**

Note: You can embed a **table of content** only if the selected template has a designated section for it.

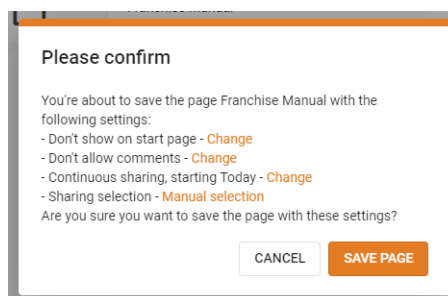
20. You can create multiple versions of the page in different available languages.

21. Review the **page preview** for the **mobile, tablet** and **desktop** devices.

Once you have formatted the new page, carefully review all the information on the **New page** tab.

22. Enter the **Save** button in the top-right corner of the page to publish the **new page**.

23. Confirm your action by clicking the **SAVE PAGE** button in the pop-up message shown on the screen.



Manage Saved Pages

On the **Pages** tab, you can **view** and **manage** the pages created by you and your colleagues.

Review Existing Pages

Once you have opened the **Pages** tab as demonstrated in the previous section, you can view different pages using various filters.

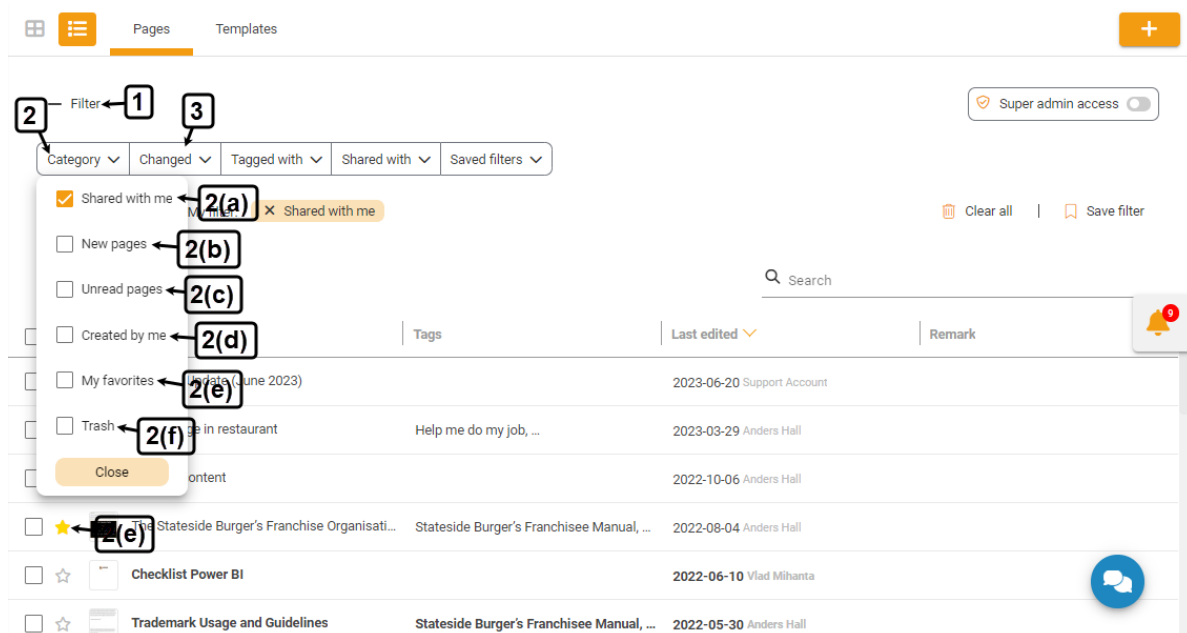
1. You can view the filter menu by clicking the **Filter** button at the top of the **Pages** tab.

By default, you will be redirected to the **Shared with me** filter that allows you to view all the pages you have access to.

You can use the other filtering options to view different pages based on these filters as follows:

Filter documents by category

2. The **Category** filters allow you to filter pages by their type e.g. "Unread pages", "Created by Me", "My favorites", etc.



2(a) Shared with me

This filter allows you to view all the pages created by you and the pages your colleagues have shared with you.

2(b) New pages

This filter shows the pages that have been recently created by your colleagues during your current login session.

Note: Pages you see from the **New pages** filter will be removed from this filter as soon as you end the current session i.e. log out from the **Chainformation** platform.

However, you can still access these pages from the other relevant documents filters.

2(c). Unread pages

This filter shows all the pages which are available to you in the **Pages** module and you have not read them yet.

These pages will be removed from the **Unread pages** filter as soon as you read them. However, you can still access these pages from the other relevant documents filters.

2(d). Created by me

This filter shows those pages that have been created by you.

2(e). My favorites

This filter shows the pages that you have marked as favorites.

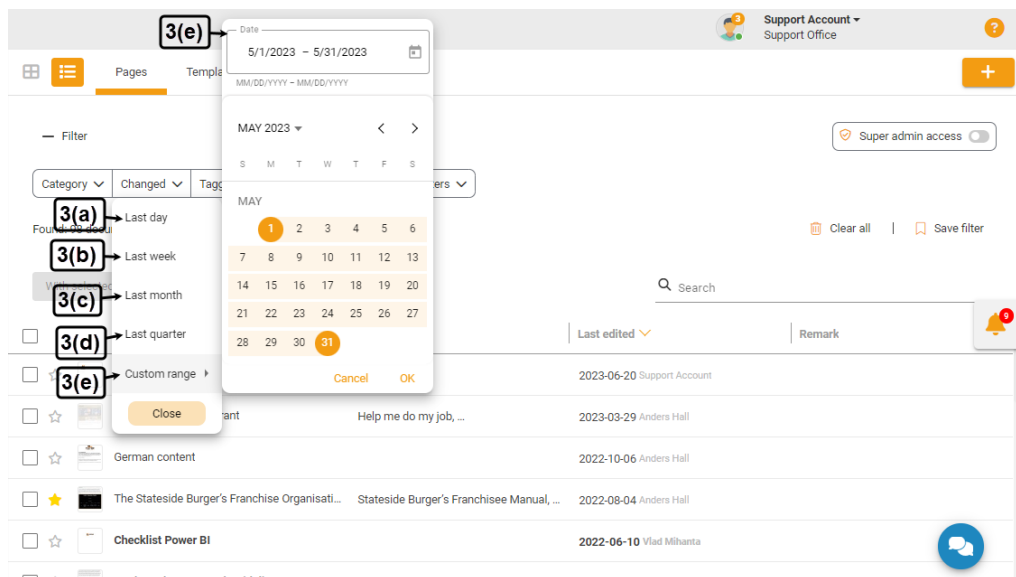
Note: You can **mark/unmark** a page as **favorite** by clicking the **Star** icon next to its name on the **Pages** tab.

2(f). Trash

This filter shows the pages that have been deleted by you or your colleagues from the **Pages** module. See the User Guide for **Trash**

Filter documents by changed

3. The **Changed** filters allow you to view pages based on their edit history i.e. when they were last edited.



You can select a date range from the **Changed** filters as follows:

3(a). Last day

3(b). Last week

3(c). Last month

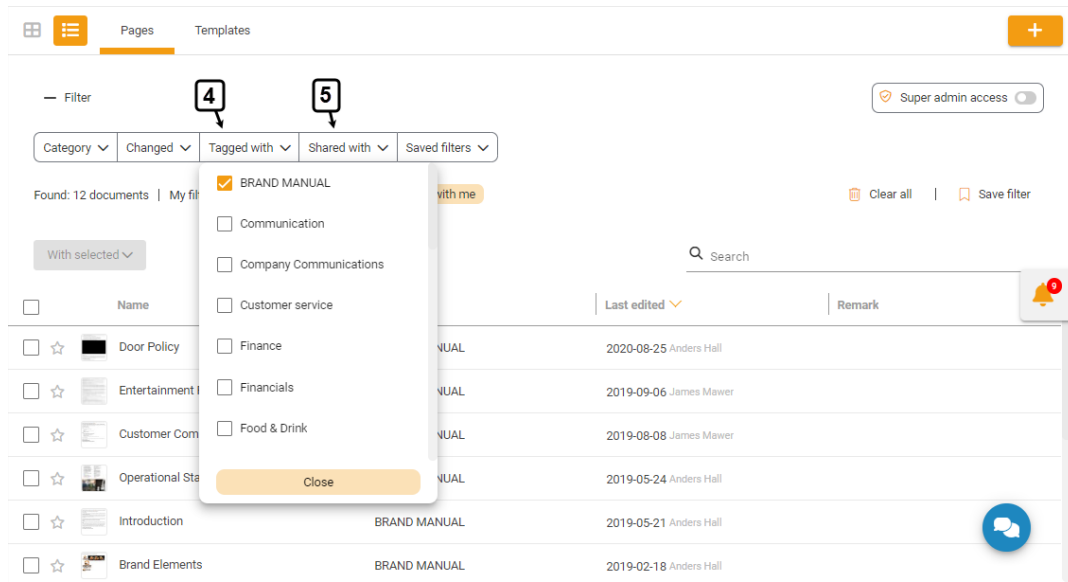
3(d). Last quarter (3 months)

3(e) Custom range

You can also view documents edited in a custom period by selecting an appropriate start and end date for the custom range filter.

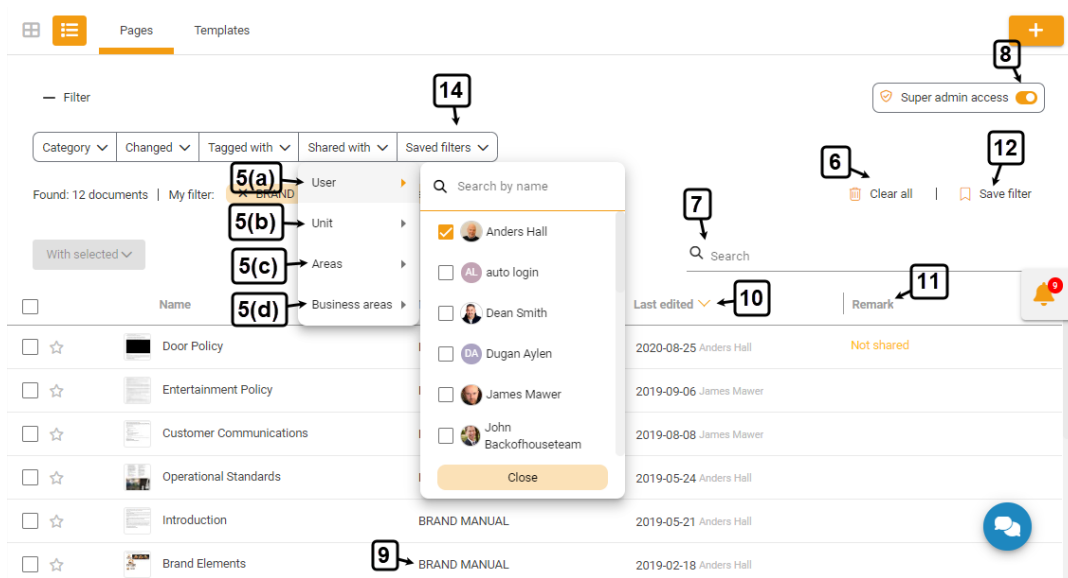
Filter documents by tags

4. The **Tagged with** filter allows you to view pages based on the tags attached to these pages. See the User Guide for Tags



Filter documents by sharing selection

5. The **Shared with** filters allows you to view pages shared with the selected users, units, areas and/or business areas in your organisation. See the User Guide for Sharing Selection



Note: When you have selected two or more Category filters, the system will show all the documents that match either one of the selected filters.

For example, when you select both the **Created by me** and **My favorites** filters, you will see all the documents created by you and your favorite documents.

On the other hand, when you select one or more filters from other filter options, the system will show the documents that match all of the selected filters. The documents that don't match with either one of the selected filters will be excluded from the search results.

For example, you select **Created by me** from the **Category** filters, **Last week** from the **Changed** filters, a tag e.g. **IT & systems** from the **Tagged with** filter, and a user e.g. **Anders Hall** from the **Shared with** filters. You will see only those documents that were created by you, changed last week, tagged with IT & systems, and also shared with Anders.

6. You can clear all the applied filters by clicking the **Clear all** button.

This will set your filter menu to its default state i.e. the **Shared with me** filter.

Search a Page

7. In addition to all the built-in filters, you can also use the **Search** field to find a page based on any of the available data/information. See the User Guide for **Search**

Note: When you have applied one or more filters from the filters menu and enter a query in the Search field, the system shows only those pages that match both the applied filters and your search query.

Enable Super Admin Access

By default, you see only those documents in the filter/search results on the **Pages** tab that are either created by you or some other user has shared them with you. But, as a super admin, you can view and manage all the pages created across your organisation's internet.

8. You can enable the **Super Admin access** by toggling the respective button on the **Pages** tab. When super admin access is enabled, you can also view those pages in your filter/search results which have not been shared with you.

Note: Only those users can have the **Super Admin** access who are associated with at least one role which has 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**

9. When viewing filter/search results on the **Pages** tab, you can view the tags (if any) associated with the listed pages under the **Tags** heading.

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

11. Under the **Remarks** heading, you can view any additional information available for a page such as it is **not shared**, **in trash**, etc.

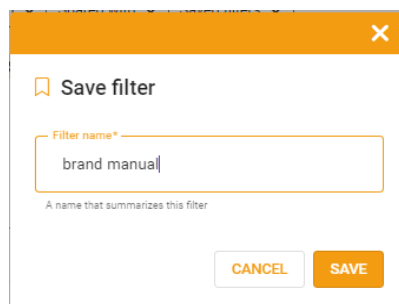
Now, we will discuss how you can save frequently used custom filters to quickly access them and save time on repetitive tasks.

Save filter

12. When you have applied at least one filter on the Pages tab, you can save this filter(s) by clicking the **Save filter** button.

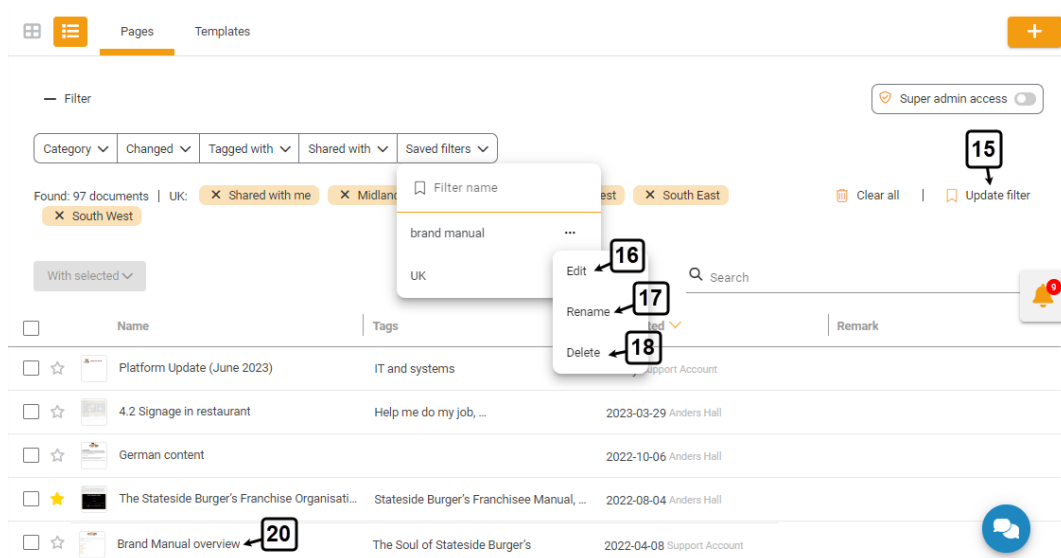
This will open the Save filter pop-up dialog.

13. Enter the **filter name** on this dialog and click the **Save** button to save this custom filter.



14. You can review and quickly access your saved custom filters from the **Saved filters** list.

Note: Saved filters are for your personal use only and no other user can view/access your Saved filters list. Also, you can't share your saved custom filters with your colleagues.



Update/Edit a filter

15. When you have applied a saved filter and add or remove a filter option from this custom filter. You can update this filter to show recently selected filter options by clicking the **Update filter** button.

16. You can also remove one or more filter options from a saved filter by clicking the **Edit** button from the Saved filter menu.

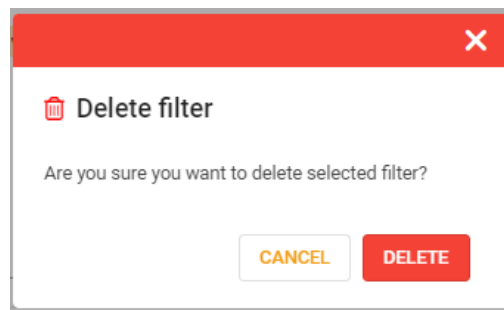
Note: When you remove all the filter options while editing it, this will delete this custom filter and you can no longer access it from your saved filters list.

17. You can rename a saved filter by clicking the **Rename** button from the Saved filter menu.

Delete a filter

18. You can delete a custom filter that is no longer needed by clicking the **Delete** button from the Saved filter menu.

19. Click the **DELETE** button on the pop-up dialog to confirm your action.

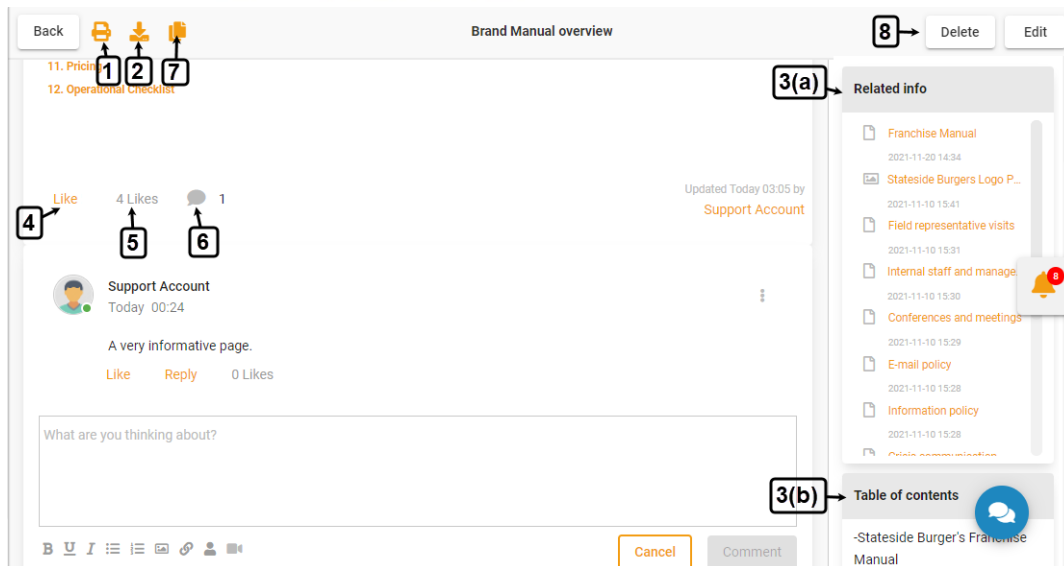


Review Content on a Page

20. You can review the details of a page by clicking its name on the **Pages** tab.

This will open the **Details** tab of the selected page where you can review its details, like the selected page and add comments to it (if applicable).

On the **Details** tab of a page, you can also **print**, **download** and **edit** it. Furthermore, you can **create a copy** of a page on its **Details** tab.



Print a Page

1. Click the **Print** icon on the **Details** tab of a page to print it.

Download a Page

2. Click the **Download** icon on the **Details** tab of a page to download its PDF version to your computer, tablet or mobile phone.

Open Related Pages or Files


3. You can open the available related pages or files of the selected page from the **Related info** menu, **Table of contents** or any other available widget in its **Sidebar**. See the User Guide for Pages Sidebar Appearance Settings

Like a Page

4. You can like a page by clicking the **Like** button at the bottom of this page.

5. You can also see the names of your colleagues who have liked a particular page by hovering your mouse over the Likes counter beneath this page.

Comment on a Page

6. You can add new comments and reply to the comments of your colleagues on a page by clicking the **Chat**  icon at the bottom of this page.

Commenting on a page is similar to writing a feed post. Just like a post, you can customise your comment on a page using various typographical and attachment options. See the User Guide for Feed Posts

Note: You can add comments to a page only if the page creator has enabled the **Allow all comments** option for it. [See the User Guide for Create a New Page](#)

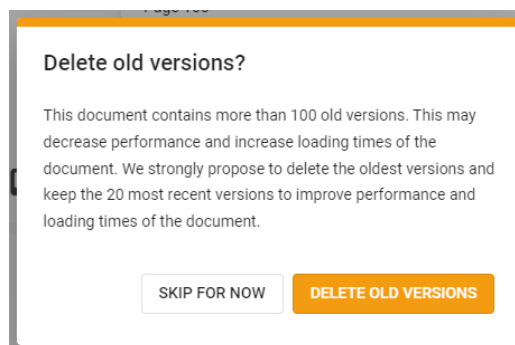
Create a Copy of a Page

7. Click the **Copy** icon on the **Details** tab of a page to create its copy. This will open the **Edit Copy of the Page** tab where you can make necessary changes in the existing content of the page before saving the copy. [See the User Guide for Edit a Page](#)

8. You can edit or delete a page by clicking the respective buttons in the top-right corner of its **Details** tab.

Edit a Page

Note: When a page contains more than 100 old versions, you will see the following dialogue after clicking the **Edit** button that proposes to delete the oldest versions and keep the 20 most recent versions of the selected document.

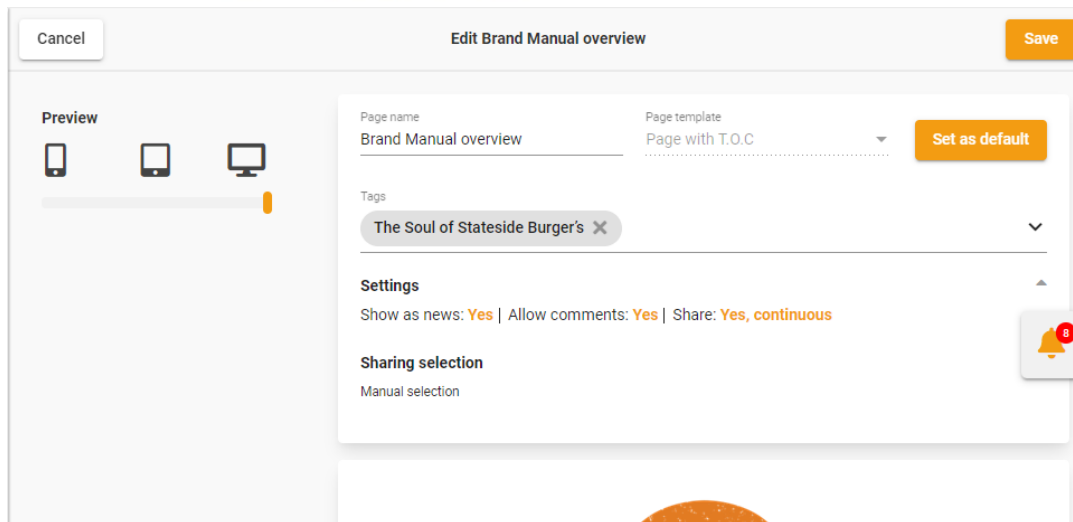


Opting to **DELETE OLD VERSIONS** will improve performance and loading times of the document.

However, you can choose to **SKIP FOR NOW** everytime you edit such a page if its old versions are still relevant to your organisation.

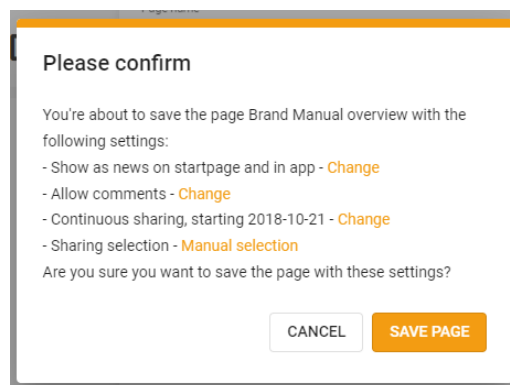
Now, follow the navigation steps demonstrated below to **edit a page** or its **copy**.

1. On the **Edit page** tab, update the details you want to edit in the selected page.



Note: You can rename a page, update its settings and content but cannot change its template once it has been published.

2. Click the **Save** button in the top-right corner of the **Edit page** tab to save all the changes you have made.
3. Confirm your action by clicking the **SAVE PAGE** button in the pop-up message shown on the screen.



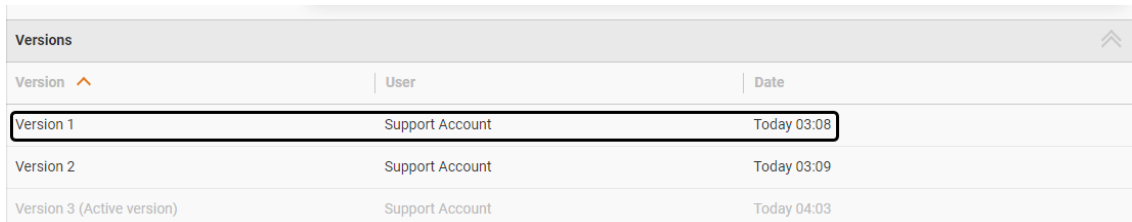
The system will save the updated settings and content as the **active version** of the selected page and this version will be shown on the **Pages** tab from now on.

However, you can access previous versions of a page by scrolling down to the **Versions** menu on the **Edit page** tab and restore a previous version (if required).

Versions		
Version	user.user	Date
Version 1	Anders Hall	2018-10-22 15:05
Version 2	James Mawer	2019-08-12 14:41
Version 3 (Active version)	Support Account	2022-04-07 23:06

Restore a Previous Version of a Page

1. Scroll down to the **Versions** menu on the **Edit page** tab and **click the version** you want to restore.

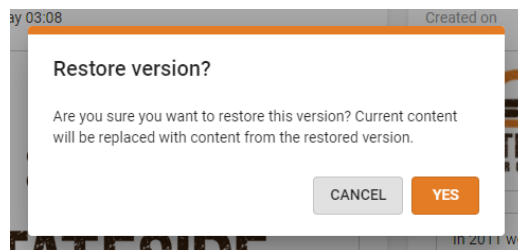


Version	User	Date
Version 1	Support Account	Today 03:08
Version 2	Support Account	Today 03:09
Version 3 (Active version)	Support Account	Today 04:03

This will open both the **selected** and **active versions** side by side.

2. Click the **Restore** button in the top-right corner of the page to restore the selected version.

3. Confirm your action by clicking the **Yes** button in the pop-up message shown on the screen.



The system will replace the content of the currently active version with the content from the restored version.

Remember, the system will replace the content of the currently active version with the content from the restored version only if you have saved the page with the restored version on the **Edit page** tab. [See the User Guide for Edit a Page](#)

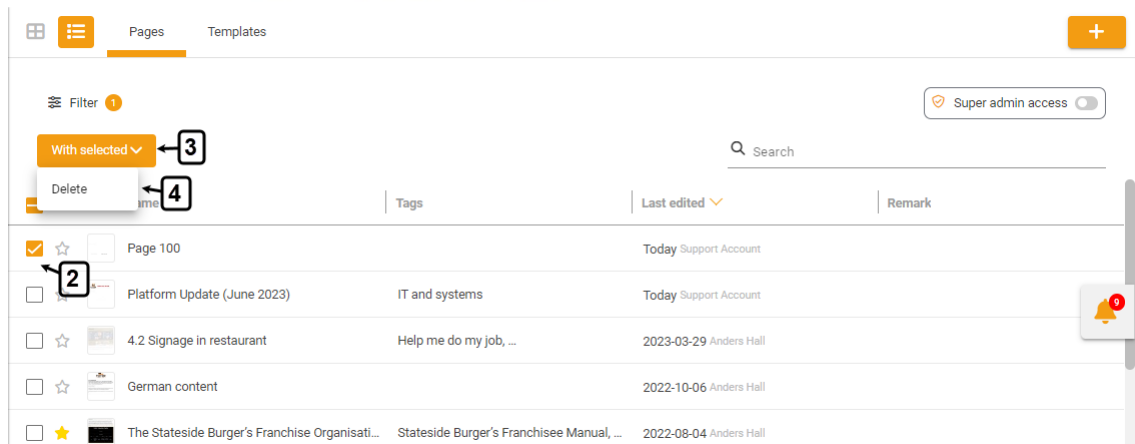
Delete a Page

1. Open the **Pages** tab by following the navigation steps as demonstrated in the previous section.

2. On the **Pages** tab, **check the checkbox** next to the name of the page or pages you want to delete.

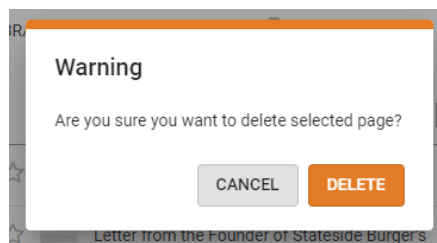
3. Click the **With selected** button above the listed tags.

4. Click the **Delete** option from the **With selected** dropdown to delete the selected pages.



5. You can also delete a page by clicking the **Delete** button in the top-right corner of the **Details** tab of the page you want to delete.

6. Click the **DELETE** button in the pop-up message shown on the screen to delete the selected page.



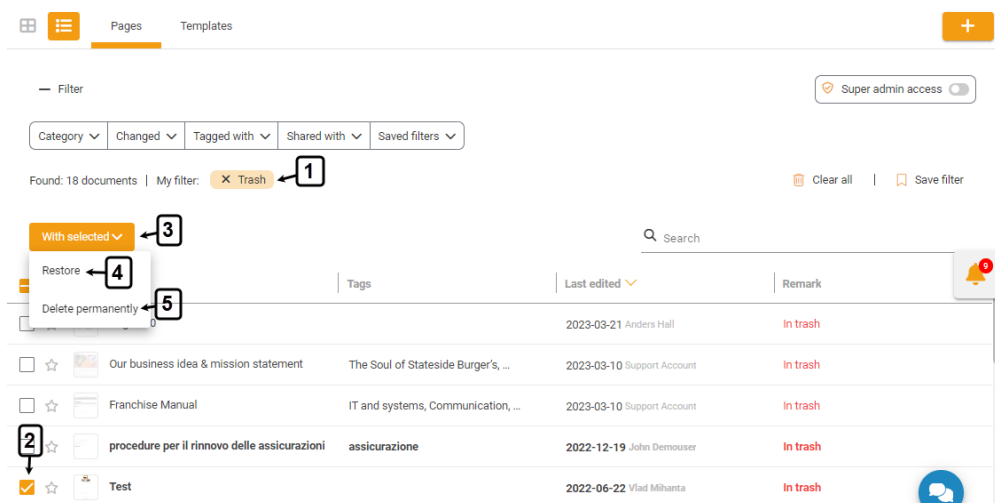
Note: When you **delete** a page, it will be moved to the **Trash** folder of the **Pages** module from where you can **restore** it (if required). [See the User Guide for Trash](#)

Manage Pages in Trash

Every **Chainformation** platform has a designated **Trash** folder for the **Pages** module from where you can restore a deleted page or delete it permanently.

1. You can access the documents in trash by applying the **Trash** filter from the **Category** filters on the **Pages** tab. [See the User Guide for Filter Documents by Category](#)

Follow the navigation steps demonstrated below to **restore** a deleted page or **delete** it **permanently**.



2. Check the **checkbox** next to the name of the page or pages you want to restore or delete permanently.

3. Open the **With selected** menu provided above the listed tags.

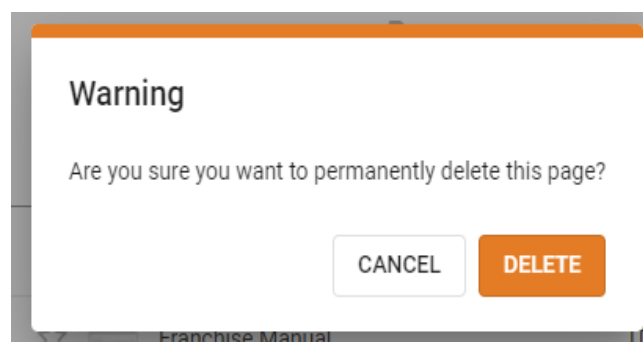
Restore a Deleted Page

4. Select the **Restore** option in the **More** menu to restore the selected pages and move them back to their respective category on the **Pages** tab.

Delete a Page Permanently

5. Select the **Delete permanently** option in the **More** menu to delete the selected pages permanently.

6. Click the **DELETE** button in the pop-up message shown on the screen to confirm your action.



Remember, you cannot retrieve a page once you have deleted it permanently from the **Trash** folder.