

Chainformation Admin User Guide

(Posts & Forums Modules)

Last Updated: April 25, 2022

Welcome to the **Chainformation** user guide. In this manual, we will learn how to share and manage Posts in the News feed and Forums in your organisation's platform.

Chainformation News feed is similar to a **Facebook timeline** where users will get all new updates and activities, and you can quickly interact with your colleagues by posting in the feed. You can add media files to your posts and insert links to various types of content such as **pages, forms, checklists**, etc. You can also show content from a third-party website like **Youtube, Twitter, Vimeo** in a post by inserting an **Iframe embed code** to it.

Chainformation Forums module works like **Facebook groups** where you can create specific closed groups and quickly access all the posts in a particular discussion.

You can create **local, central, or global** forums on your **Chainformation** platform to discuss particular topics and ideas in a dedicated feed. You should create forums to share relevant information instead of sharing all the posts in your News feed on the **Chainformation** homepage. This helps you to keep the Start Page feed open for HQ-info only, and discussions on different topics separate from each other and finding a specific older post becomes easier.

NOTE to SUPER ADMIN: You must first make the proper settings for the **Forum admin** function in your **system setup** to control which **Roles** in your organisation are allowed to create new forums and edit existing forums. [See the User Guide for Roles Administration](#)

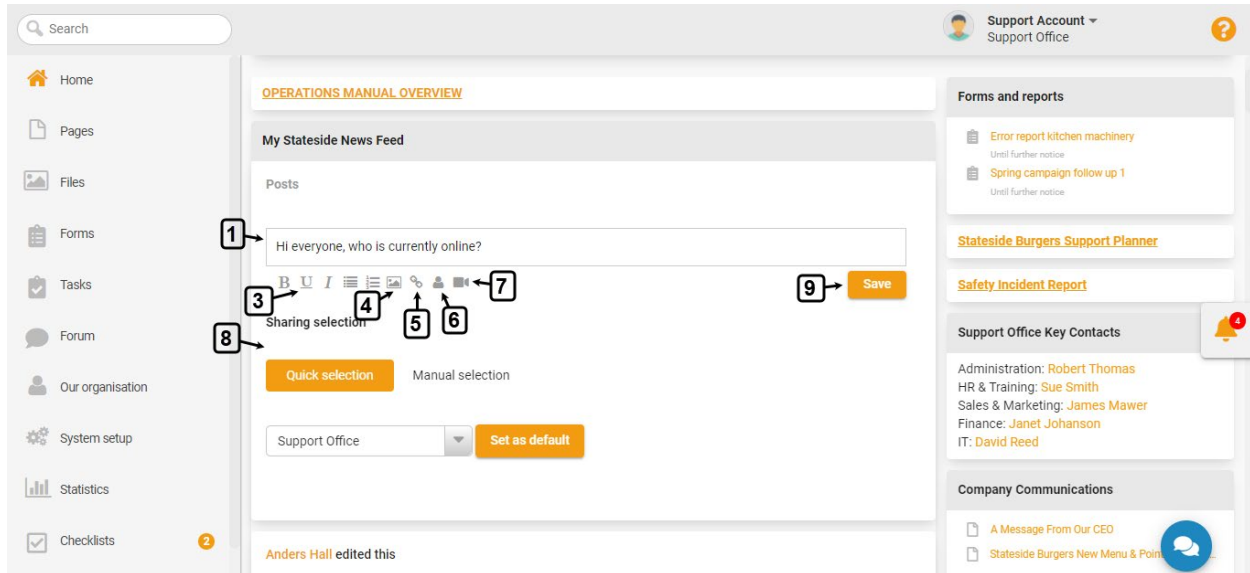
Here is a list of all the features of the **Posts and Forums** modules that we will discuss in this manual.

- Create a New Post
 - Create a New Post on Chainformation Desktop Platform
 - Create a New Post on Chainformation Mobile App
- Create a New Forum
- Start a New Discussion in a Forum
- Manage Posts in Your News Feed
 - Like a Post
 - Reply to a Post
 - View Reach of a Post

- Edit a Post
- Pin/Unpin a Post
- Delete a Post
- Manage Your Existing Forums
 - Review Active Forums
 - Review Discussions in a Forum
 - View and Share Posts in a Forum Discussion
 - Edit a Forum
 - Delete a Discussion in a Forum
 - Delete a Forum

Create a New Post on Chainformation Desktop Platform

Once you have logged in to the **Chainformation** desktop platform, then follow these navigation steps to **create a new post** and share it with your selected colleagues.



1. Hover your mouse over the **Write a post** box under the **Posts** section in the **News Feed** widget on your **Chainformation** homepage and click here to start writing a new post.

Remember, the **Feed** widget will appear on your startpage only if you have added it to your Startpage Structure. [See the User Guide for Startpage Appearance Settings](#)

2. While writing a post, you can format your text and related content using various typographical and attachment options.

Here is a brief summary of these options available with the **Posts** module.

3. You can use various basic and advanced text editing tools to format the text in a feed post.

4. You can insert a file from the **Files** tab or upload it from your device to a feed post.

5. You can **insert** or **remove** a **link** to other internal functions; **checklist**, **colleague**, **file**, **page**, **form**, **website** and **email address**.

6. You can **tag** your **colleagues** in a feed post.

7. You can insert a video from your device or **Iframe embed code** to show content from a third-party website like YouTube, Vimeo, Twitter, etc.

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

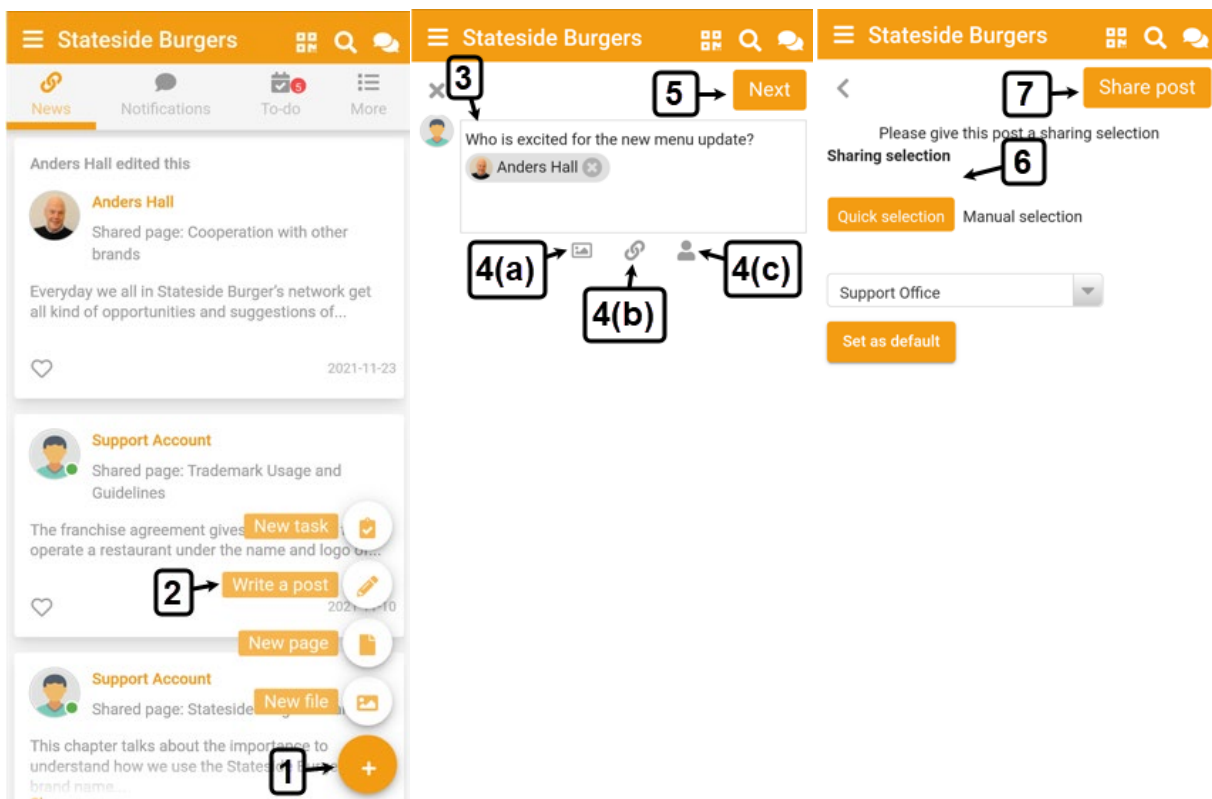
<https://chainformation.com/userguides>

9. Once you have formatted your post, enter the **Save** button in the bottom-right corner of the text box to share the post with your selected colleagues.

The recipients will get a push notification in the mobile app if they are logged on.

Create a New Post on Chaininformation Mobile App

Once you have logged in to the **Chaininformation** mobile app, then follow these navigation steps to **create a new post** and share it with your selected colleagues



1. Click the (+) icon in the bottom-right corner of your home screen to open the **Create** menu.
2. Click the **Write a post** button from the **Create** menu to create a new post.
3. Write your post in the “**What’s on your mind?**” box on the next screen.

Remember, the typographical and attachment options available to you when writing a post on the **Chaininformation** mobile app are limited as compared to the desktop platform.

For example, you can write **plain text** but **cannot** utilise **special text formatting** such as bold, underline, list, etc.

4. However, you can still **insert videos from your device, files, links** and **mention your colleagues** in a post using the **Chainformation** mobile app.

On the other hand, you **cannot** insert **Iframe embed code** to show content from a third-party website in a post on the mobile app.

Therefore, you should use the **Chainformation** desktop platform if you want to create a more advanced post using all the options instead of sharing some quick information. [See the User Guide for **Create a New Post on Chainformation Desktop Platform**](#)

5. Once you have added all the required information in the new post, **click** the **Next** button to proceed to selecting the sharing selection for it.

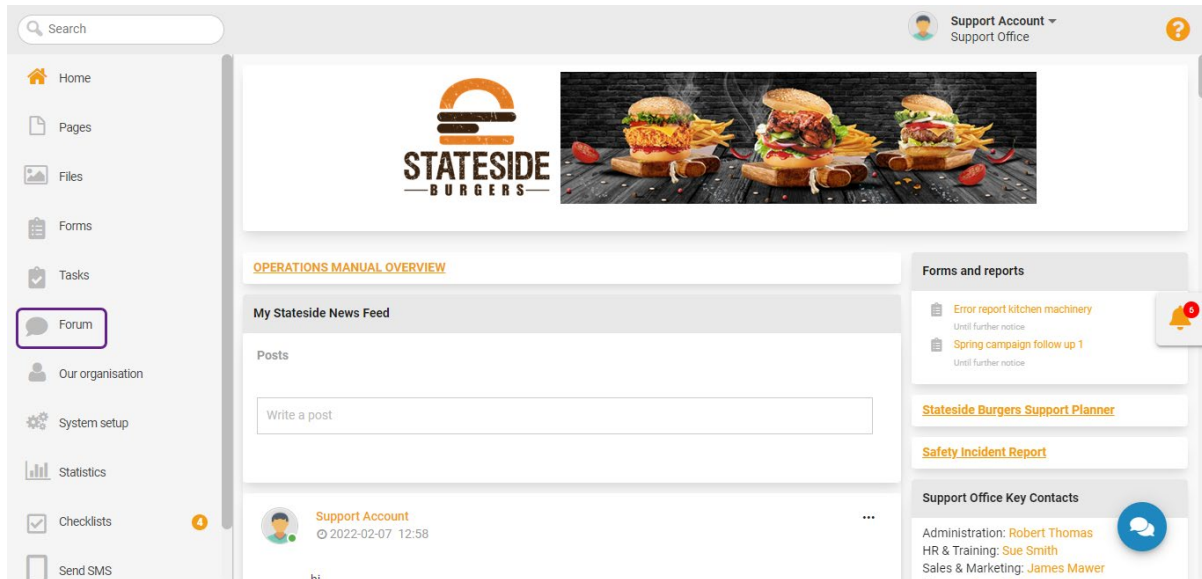
6. On the next screen, select a **Sharing selection** for the new post. [See the User Guide for **Sharing Selection**](#)

7. After selecting the required sharing selection , **click** the **Share post** button to share the new post with your selected colleagues.

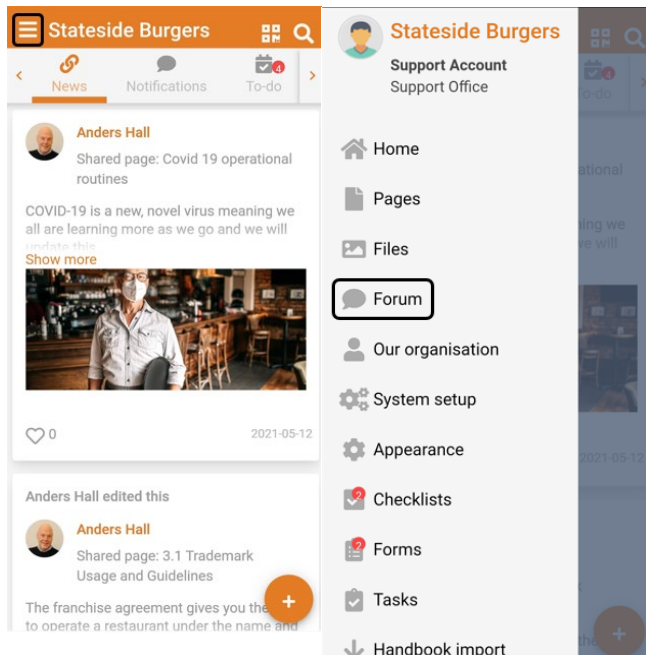
Create a New Forum

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

1. Click the **Forum** button in the left-side menu to open the **Forum categories** page.

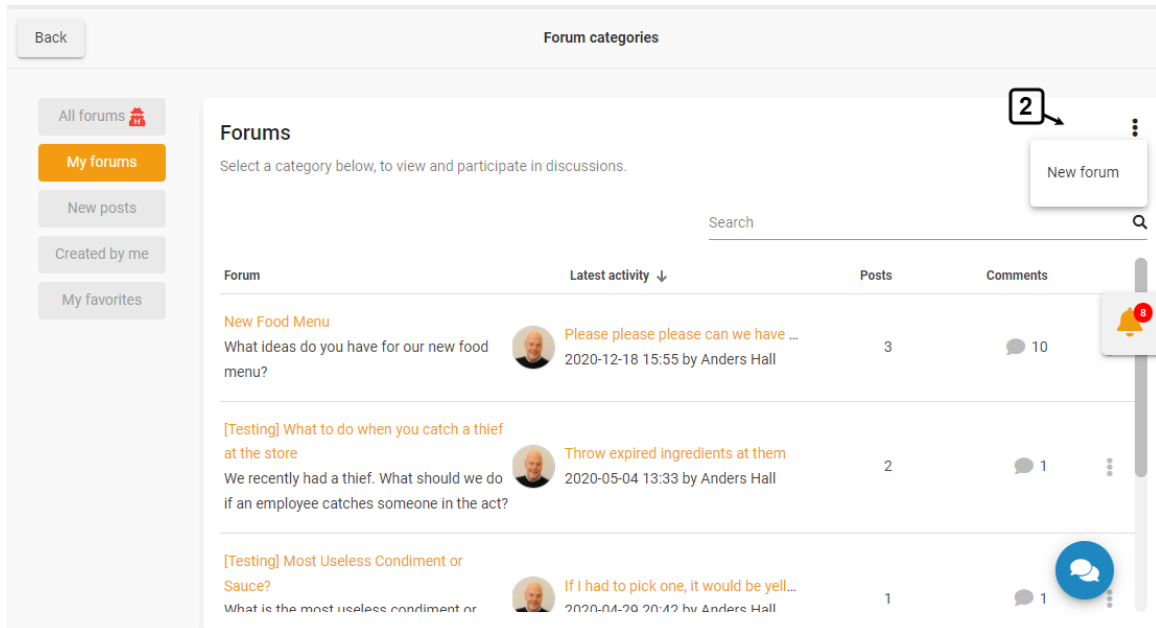


If you are accessing the platform from the **Chainformation** mobile app, you can open your profile menu by clicking the **hamburger** icon in the top-left corner of your mobile screen.

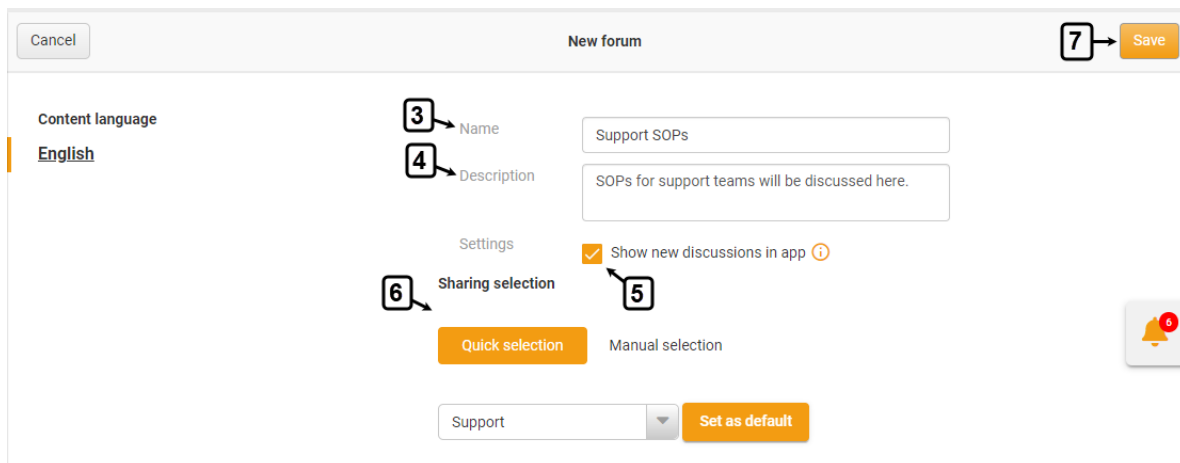


This will open the **Forum categories** page.

2. On the **Forum categories** page, click the **three-dots ellipsis** icon next to the **Forums** heading and then, click the **New forum** option from the **context menu** to create a new forum.



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



3. On the **New forum** page, enter a **Forum name**.

The name of a forum should be clear, descriptive and reflecting the topics, subjects or ideas that will be discussed in this forum.

4. Enter a brief **Description** (if applicable) to further explain the type of discussions that will be covered in this forum.

5. In the **Settings** of the **New forum**, check the checkbox next to the “**Show new discussions in app**” option if you want to show new discussions in this forum as notifications in the feed in Chaininformation mobile app.

Note: If you **opt not** to select the “**Show new discussions in app**” option then new discussions will not be shown as notifications in the mobile app. However, these discussions will still be shown in the **News** feed like other feed posts.

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

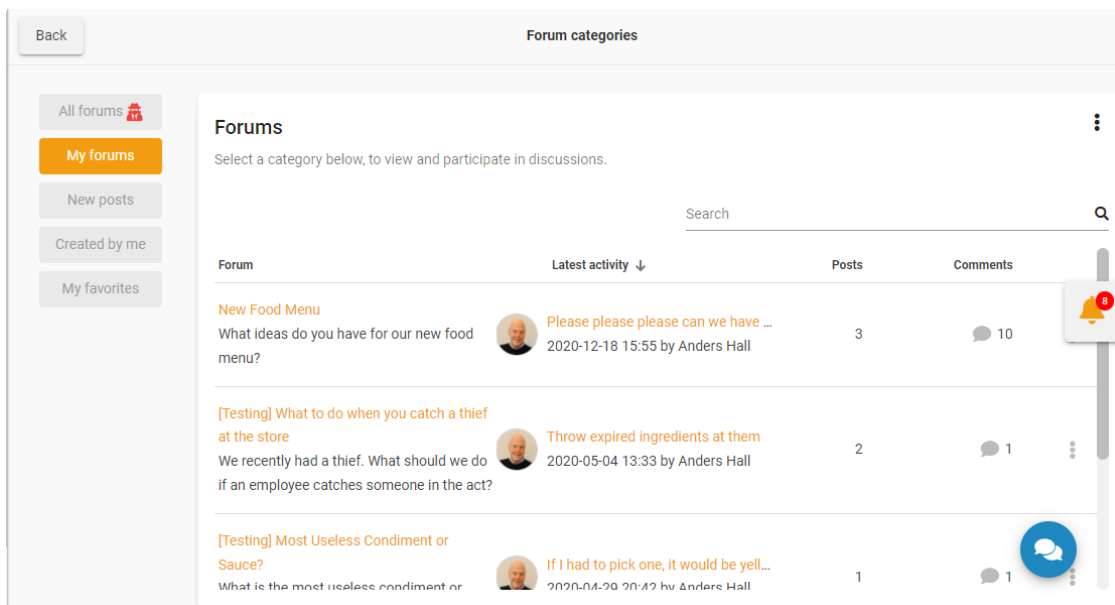
7. Once you have entered all the required information for the new forum, enter the **Save** button in the top-right corner of the page to make it available for your selected colleagues.

Now, you and your selected colleagues can start discussion in the new forum by sharing posts in it. [See the User Guide for Share a Post to a Forum](#)

Start a New Discussion in a Forum

You can see recent discussions in different forums on your **New feed** and add replies to posts in these discussions but **cannot start a new discussion** in a forum from the **News feed widget**.

1. Instead, you have to go to the particular forum on the **Forum** page if you want to share a post to it.

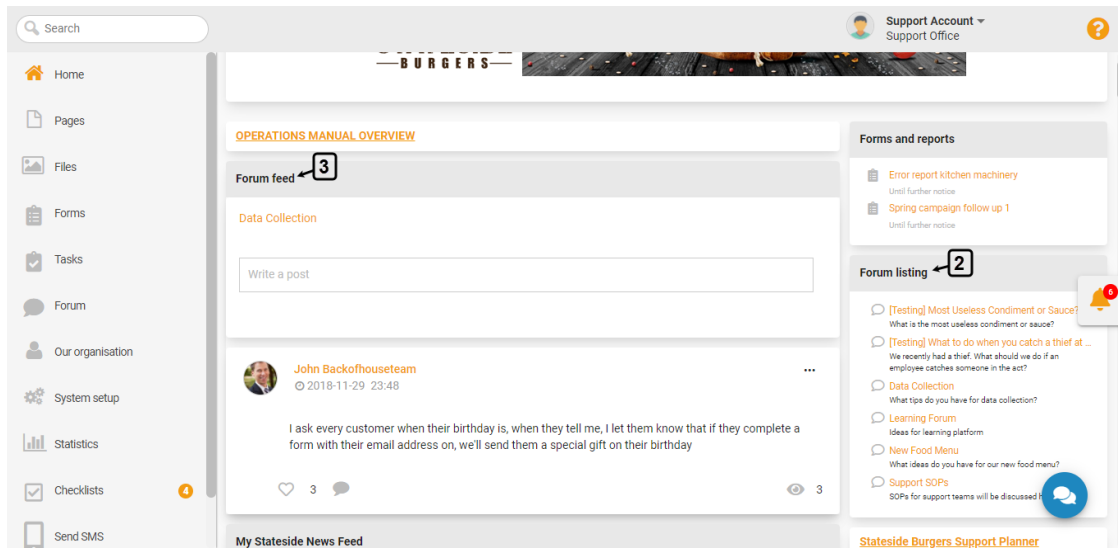


2. However, you can add a **Forum listing widget** to your startpage appearance.

Now, all the users can quickly access the forums shared with them from this listing.

3. Furthermore, you can add a **Forum feed widget** to your startpage appearance to show a particular forum activity on your homepage.

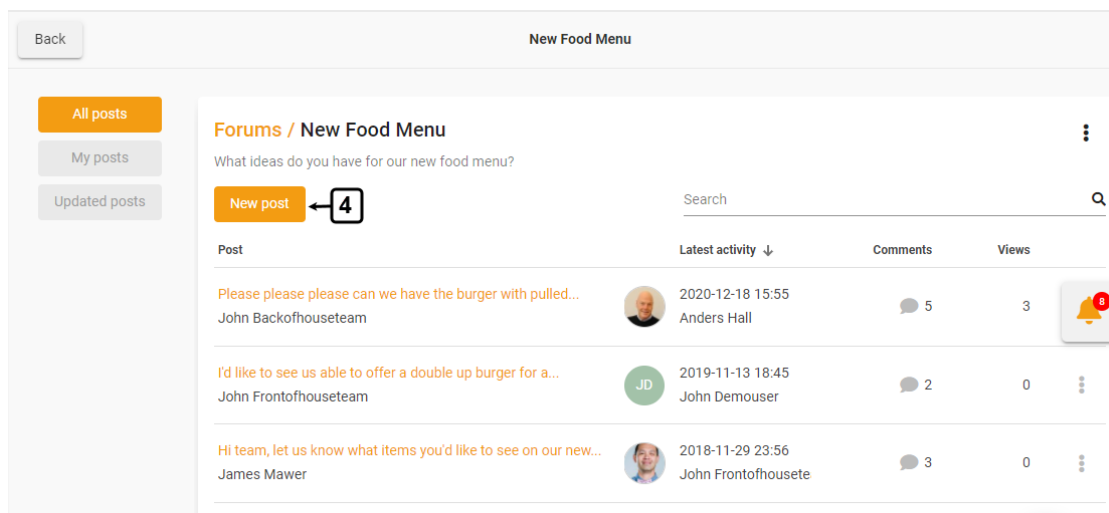
Now, the selected users can quickly access this forum using this feed.



Note: We strongly recommend you should not add a **Forum feed widget** to your startpage appearance unless it is for a frequently used forum.

However, adding a **Forum listing widget** to startpage appearance might be a good idea as it allows your colleagues to quickly access the forums shared with them. [See the User Guide for Startpage Appearance Settings](#)

4. Once you have accessed a forum using whichever way, click the **New post** button on the selected **Forum** page to start a new discussion in this forum.



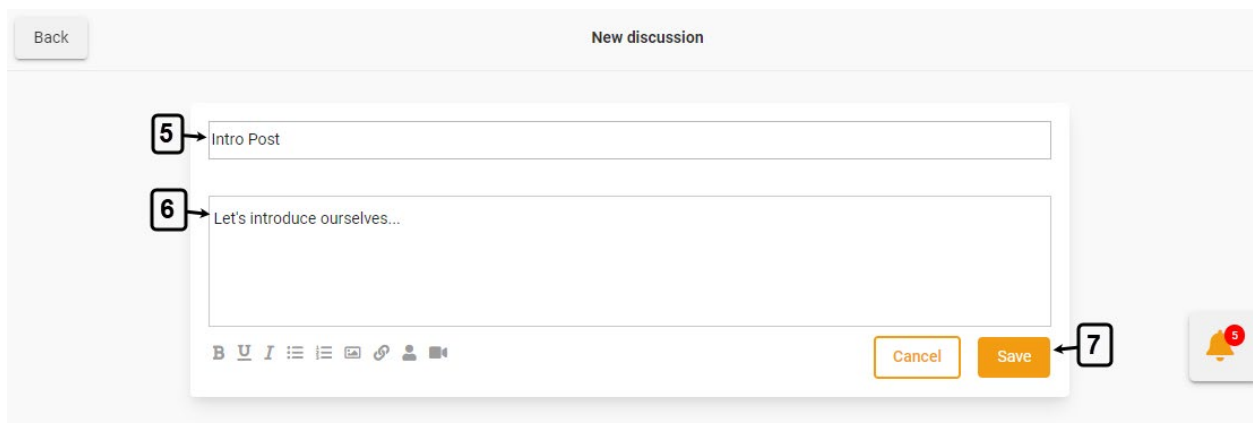
This will open the **New discussion** page.

5. On the **New discussion** page, enter the **subject** of this discussion.

6. Write your post in the **Message** box and format it as demonstrated in the previous section of this manual. [See the User Guide for Create a Post](#)

7. Once you have formatted your post, enter the **Save** button in the bottom-right corner of the text box to share the post to the selected forum.

The recipients will get a push notification of this post in the mobile app if you have enabled the “**Show new discussions in app**” option in the **Settings** of the selected forum.



Manage Posts in Your News Feed

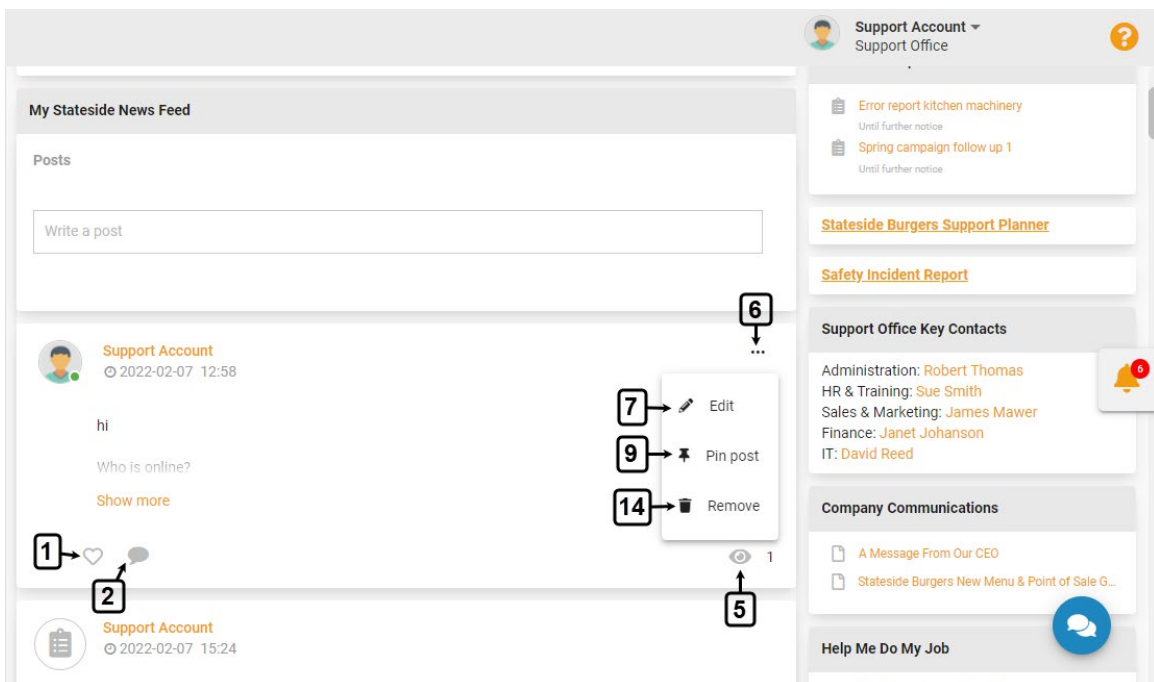
Recent and pinned posts shared by you and your colleagues are always shown at the top of your **News** feed on both the **Chainformation** desktop platform and mobile app. You can also view the older posts by scrolling down your News feed.

There are three types of posts shown on your **News** feed:


- 1) General posts created by you and your colleagues as demonstrated in the previous section of this manual.
- 2) Posts shared in forums created by you or your colleagues. See the User Guide for **Forums**
- 3) The pages and forms shared by you and your colleagues as news on the startpage. See the User Guide for **Pages and Forms**

Now, we will discuss different options available with these three types of posts in your News feed as follows:

- Like a Post
- Reply to a Post
- View Reach of a Post
- Edit a Post
- Pin/Unpin a Post
- Delete a Post



Like a Post

1. You can like a post by clicking the **Heart**  icon beneath this post.

Reply to a Post


2. You can add a reply to general and forum posts by clicking the **Chat**  icon beneath a post.

Note: You cannot add a reply to a page or form shared as a post.

3. However, you can open a page in the **Pages** module by clicking its name or the **Read more** button in the respective feed post.

4. Similarly, you can view and answer a form in the **Forms** module by clicking its name in the respective feed post.

View Reach of a Post

5. You can view who has seen a particular post by scrolling your mouse to the **Visibility/Eye**  icon beneath this post. When clicking the eye you will get a list of all the colleagues who have seen the post.

Furthermore, you can edit, remove or pin a post from its context menu.

6. To open the **context menu** of a post, click the **three dots Ellipsis** icon in this post.

Note: When you are using the **Chainformation** mobile app, the ellipsis icon for the context menu of a post is not shown in your News feed. Instead, it is shown only when you click a post and it opens in a separate window.

Edit a Post

7. Click the **Edit** button from the context menu of the post you want to edit.

8. Now, update the details you want to edit in the selected post and reshare it by following the navigation steps demonstrated in the previous sections. [See the User Guide for Create a Post](#)

Pin/Unpin a Post

Remember, you could pin or unpin a post only if you are a **Super Admin** or associated with another role that has been assigned the **Administrate** right for the **Posts** module. See the User Guide for Roles Administration

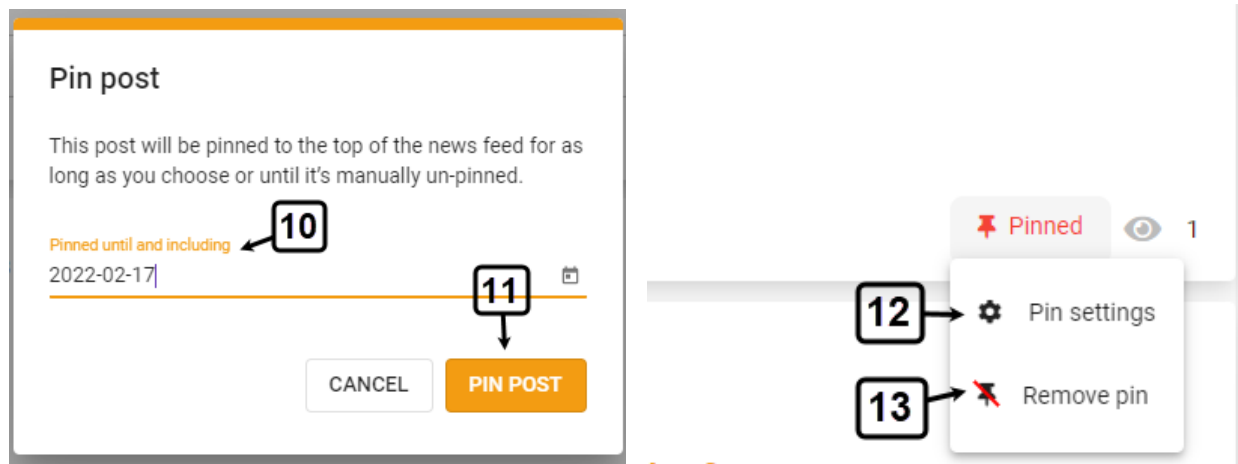
There can be a maximum of three (3) posts pinned at the same time. If you add a fourth, the oldest pinned post will be replaced.

9. Click the **Pin** post button from the context menu of the post you want to pin to the **top** of the **News** feed.

By default, a post will be pinned to the top of the News feed for **7 days** from the date you pin it.

10. However, you can choose to set a different pin duration by entering an appropriate end date in the **Pinned until and including** field in the **Pin post** pop-up shown on the screen.

11. Click the **PIN POST** button in the pop-up message to pin the post to the top of the News feed for the selected period.



Now, the selected post will be pinned as long as you have chosen or until it's manually unpinned.

12. You can **change** the **end date** of the pin period of a post by clicking the **Pin settings** from its context menu.

13. You can **unpin** a post from the top of the News feed by clicking the **Remove pin** button from its context menu.

Note: The **Pin settings** and **Remove pin** options could be accessed by clicking either the **three dots ellipsis** icon in a post or **Pinned button** beneath it.

Delete a Post

Remember, there is no **Trash** folder for the **News feed** module on the **Chainformation** platform from which you can restore a deleted feed post. Therefore, when you remove a post from the News feed, it will be deleted permanently and you can never retrieve it.

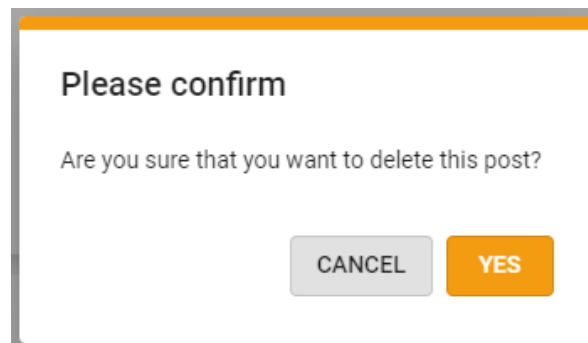
The forum post will be removed from the **News** feed as well as its respective **forum** when you delete it.

A page or form shared as a news on startpage will be removed from the **News** feed when you delete a feed post containing this information. However, the pages and forms removed from the News feed could still be accessed in their respective modules.

Now, follow the navigation steps demonstrated below to delete a feed post if you really want to do so.

14. Click the **Remove** button from the context menu of the post you want to delete.

15. Click the **YES** button in the pop-up message shown on the screen to confirm your action of deleting the selected post.



Manage Your Existing Forums

On the **Forum categories** page, you can **view** and **manage** the forums created by you and your colleagues.

In this section, we will discuss the following features of the **Forum** module.

- Review Active Forums
- Review Discussions in a Forum
- View and Share Posts in a Forum Discussion
- Edit a Forum
- Delete a Discussion in a Forum
- Delete a Forum

Review Active Forums

Once you have opened the **Forum categories** page as demonstrated in the previous section, you can view different pages under the following categories.

My forums

1. By default, you will be redirected to the **My forums** tab. This tab contains all the forums created by you and the forums shared by your colleagues with you.

All forums

2. **Super Admins** and other users who are assigned the **Forum admin** role can access and share posts to those forums as well which are not shared with them. However, they can edit or delete a forum only if it has been shared with them.

They can access all the **local**, **central** and **global** forums from the **All forums** tab depending upon the right they have been assigned for the **Forum admin** function. See the User Guide for Roles Administration

New posts

3. **New posts** tab contains the forums which have been recently active and someone has shared a new post to these forums.

Created by me

4. **Created by me** tab contains only those forums that have been created by you.

My favorites

5. **My favorites** tab contains the forums which you have marked as favorites.

Search a Forum

6. You can also use the **Search** field to find a forum based on any of the available data/information. See the User Guide for **Search**

You can see the brief description and other details of each forum listed on the **Forum categories** page as follows.

7. You can see the **description** of a forum under its name on the **Forum categories** page.

8. Under the **Lastest activity** heading, you can see who and when has shared the latest post to a forum.

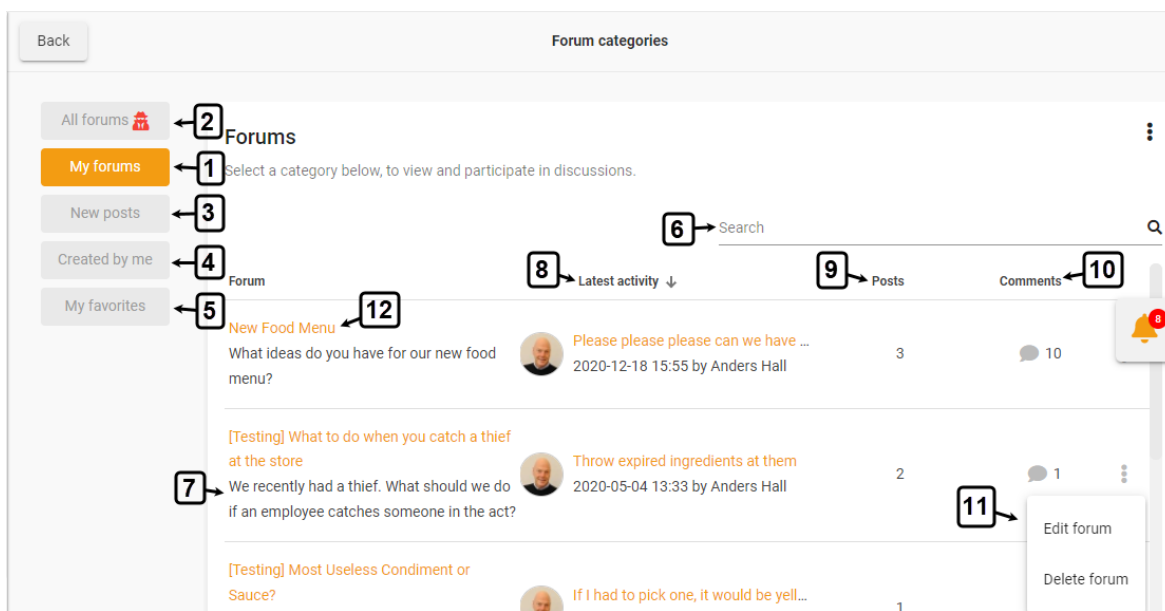
9. Under the **Posts** heading, you can see the total number of discussions started in a forum.

10. Under the **Comments** heading, you can see the total number of original posts and replies to these posts in a forum.

11. You can **edit** or **delete** a forum by selecting the relevant option from its **context menu** on the **Forum categories** page.

11(a). Click the **three-dots ellipsis** icon next to the name of a forum to open its **context menu**.

12. You can view the discussions in a forum by clicking its name on the **Forum** page.



Review Discussions in a Forum

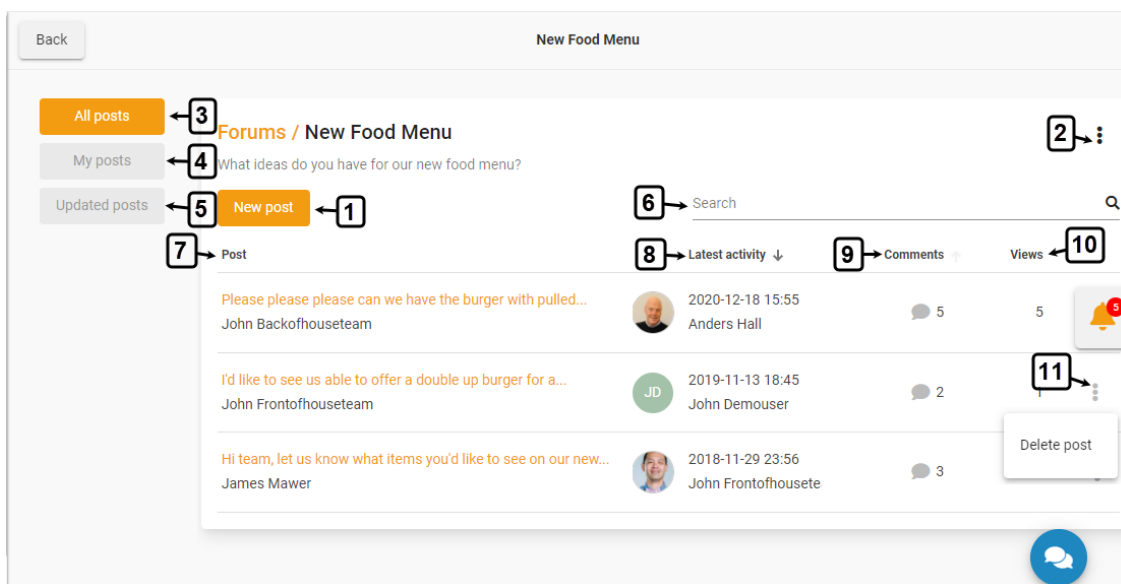
As described in the previous sections of this manual, you can access a forum from a **widget/listing** on your **homepage** or the **Forum categories** page.

1. On the selected **Forum** page, you can see active discussions in a forum, share new posts in these discussions and start a new discussion. See the User Guide for **New Discussion in a Forum**

2. Likewise, you can **edit** or **delete** a forum by selecting the relevant option from its **context menu** on the **Forum categories** page. See the User Guides for **Edit and Delete a Forum**

2(a). Click the **three-dots ellipsis** icon next to the name of a forum to open its **context menu**.

Once you have opened the selected **Forum** page as demonstrated in the previous section, you can view discussions in this forum under the following categories.



All posts

3. By default, you will be redirected to the **All posts** tab. This tab contains all the discussions started in the selected forum so far.

My posts

4. **My posts** tab contains only those discussions that have been started by you.

Updated posts

5. **Updated posts** tab contains the discussions to which someone has recently shared a post and you haven't seen this post yet.

These discussions will be removed from the **Updated posts** tab as soon as you see these recent posts. However, you can still access these discussions from the other relevant tabs on the selected **Forum** page.

Search a Post

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

You can see the subject and other details of each discussion on the selected **Forum** page as follows.

7. Under the **Post** heading, you can view the **subject** of a discussion and who has started this discussion.

8. Under the **Lastest activity** heading, you can see who and when has shared the latest post to a discussion.

9. Under the **Comments** heading, you can see the total number of replies added to the original posts of a discussion.

10. Under the **Views** heading, you can see the total number of colleagues who have visited a forum post till now.

11. You can **delete** a **post** from its **context menu** on the selected **Forum** page. [See the User Guide for Delete a Discussion in a Forum](#)


12. You can view all the posts in a discussion by clicking the **discussion subject** on the selected **Forum** page.

This will open the **Viewing forum post** page.

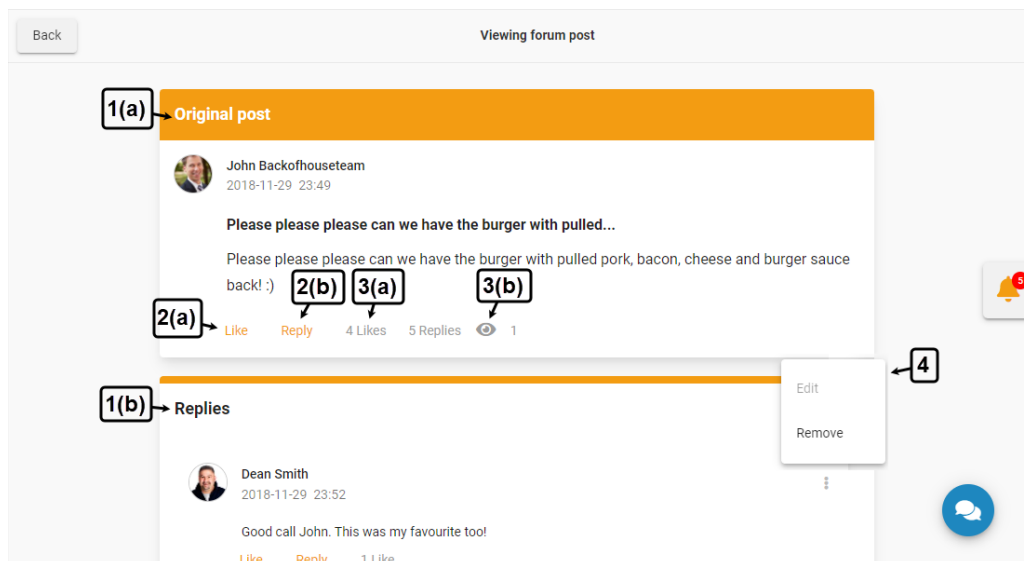
View and Share Posts in a Forum Discussion

1. On the **Viewing forum post** page, you can view the **original post** in the selected discussion and **replies** added to this post till now.

2. You can **like** the posts in the discussion and add **replies** to them on the **Viewing forum post** page.

3. You can view the names of your colleagues who have seen and liked a particular post in the selected discussion by hovering your mouse over the **Visibility/Eye**  icon and **Likes** button respectively beneath this post.

4. You can **edit** a post or **remove** it from the selected discussion (if applicable) by clicking the relevant option from its **context menu**.



Remember, you cannot remove the original post in a discussion from the **Viewing forum post** page. If you want to delete the original post in a discussion and all the replies to this post with one click, you can do this from the selected **Forum** page. See the User Guide for **Delete a Discussion in a Forum**

Note: The navigation steps demonstrated in this section are similar to the options available with a **News feed post**. Therefore, you can see the **User Guide** for **Feed Posts** to get more insights into how to manage posts in a forum.

Edit a Forum

1. To edit a forum, click the **Edit forum** option from its **context menu** on the **Forum categories** or selected **Forum** page as demonstrated in the previous sections. See the User Guide for **Review Active Forums**

This will open the **Edit forum** page for the selected forum where you can edit its **name**, **description**, **settings** and/or **sharing selection** as demonstrated in the previous section of this manual. See the User Guide for **Create a New Forum**

Cancel Edit forum - [Testing] What to do when you catch a thief at the store Save

Content language
English

Name [Testing] What to do when you catch a thief at the st

Description We recently had a thief. What should we do if an employee catches someone in the act?

Settings Show new discussions in app ⓘ

Sharing selection

Quick selection Manual selection Save as new quick selection

Share with:

Roles

- 01 SuperAdmin
- 02 Executive Team
- 03 Support Team
- 04 Regional Mana...
- 05 Store Manager ...
- 06 Store Supervisor
- 07 Back of House ...

In following:

Areas

- France
- Germany
- Italy
- UK
- USA

and / or selected units & colleagues

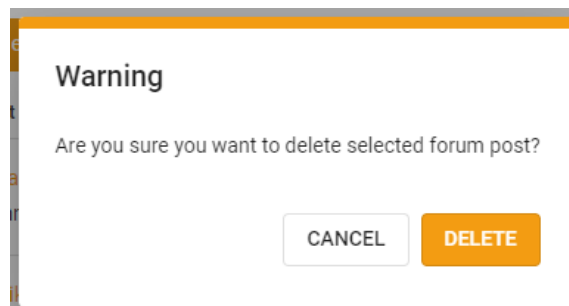
Delete a Discussion in a Forum

Remember, there is no **Trash** folder for the **Forums** module on the **Chainformation** platform from which you can restore a deleted forum discussion. Therefore, when you delete a discussion in a forum, the system will delete the original post in this discussion and all the replies to this post permanently.

However, this action will not affect any other discussion or its posts in the selected forum.

Now, follow the navigation steps demonstrated below to delete a discussion in a forum if its subject and posts are no longer relevant to the selected forum.

1. Click the **three-dots ellipsis** icon next to the subject of a post on the selected **Forum** page and then, click the **Delete post** option from the **context menu** as demonstrated in the previous section. See the User Guide for **Review Discussions in a Forums**
2. Click the **DELETE** button in the pop-up message shown on the screen to confirm the action of deleting the selected post.



Delete a Forum

Remember, there is no **Trash** folder for the **Forums** module on the **Chainformation** platform from which you can restore a deleted forum. Therefore, when you delete a forum, the system will delete all the information related to it including all its posts permanently.

Now, follow the navigation steps demonstrated below to delete a forum if its topic and discussion are no more relevant to your organisation.

1. To delete a forum, click the **Delete forum** option from its **context menu** on the **Forum categories** or selected **Forum** page as demonstrated in the previous sections. See the User Guide for **Review Active Forums**
2. Type the word **DELETE** in the pop-up field shown on the screen to proceed with deleting the selected forum.
3. Click the **CONFIRM** button below the text field to confirm your action.

