Chainformation Admin User Guide
(Tables of Contents)

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Welcome to the **Chainformation** user guide. In this manual, we will learn how to manage the **Tables of Contents** section on the **System setup** page.

Tables of Contents on a **Chainformation** platform allow you to create a folder/hierarchy-like presentation of all the Files and/or Pages associated with a particular tag and its sub tags in one place. These tables somehow serve as online folders from where you can access your specified content quickly. Sub tags associated with a main tag categorize the contents of a table in the form of subfolders or chapters.

A typical usage for the **Tables of Contents** is to present an overview of a user manual e.g the Operations Manual.

However, users cannot upload files from their devices or import content from other modules to a table of contents. The system automatically loads the pages and files associated with the corresponding tags of a table of contents. (See the separate manual on **Tags**)

Remember, the **Tables of contents** module is integrated with the **Pages** and **Files** modules only. Therefore, the system will not load any content related to the **Checklists** and **Our organization** modules for the selected tag.

NOTE to SUPER ADMIN: **Tags** and **Table of Contents** can only be created and managed by the users with the appropriate **Role** and **Admin** level. *See the User Guide for Roles Administration*

Here is a list of topics that we will discuss in this **Tables of Contents** manual.

Create a New Table of Content

Once you have logged in to the **Chainformation** platform, follow these navigation steps to **create** a **new table of contents**.

1. Click the **System setup** button in the left-side menu to open the **System setup** page.

https://chainformation.com/userguides
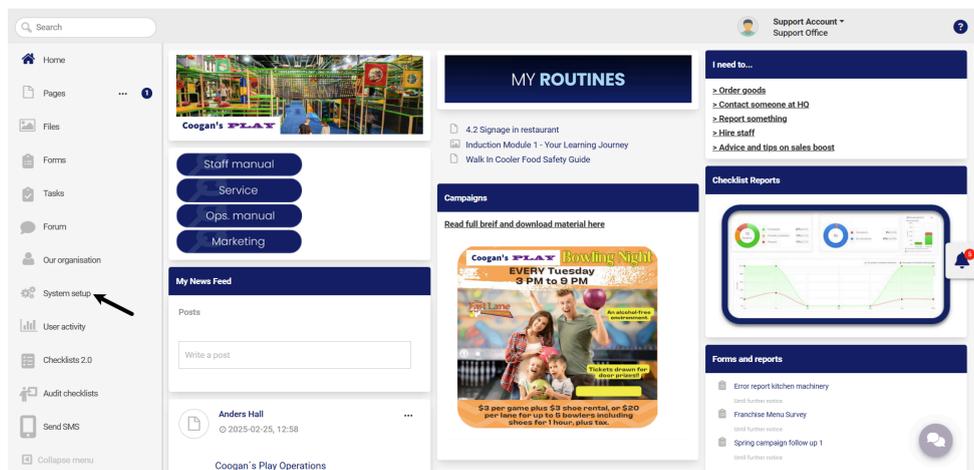
By default, you will be redirected to the **Tags** tab.
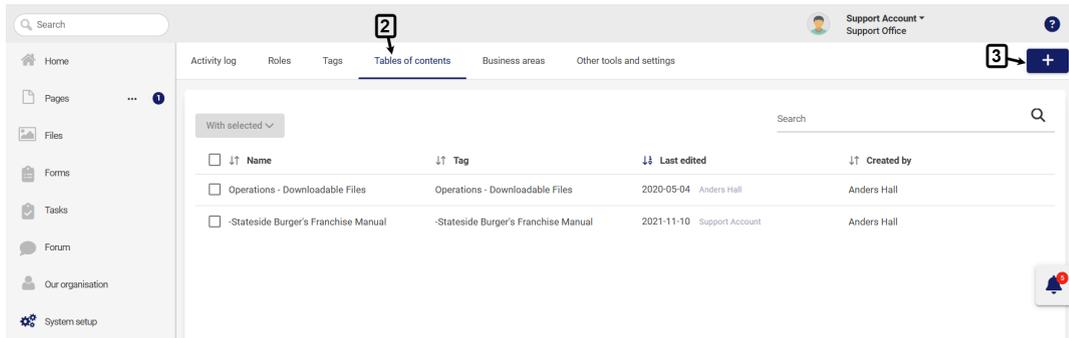
2. Click the **Table of contents** button in the header menu to open the **Table of contents** tab.

Remember, you must have already created the main tag and its sub tags for which you want to create a table of contents. Therefore, you should create your required main tag and its corresponding sub tags first, if you haven't done this already, and then proceed to the **Table of contents** tab. See the User Guide for **Tags**

3. Now, click the (**+**) icon in the top-right corner of the **Table of contents** page to create a new table of contents.

This will open the **New table of contents** page.
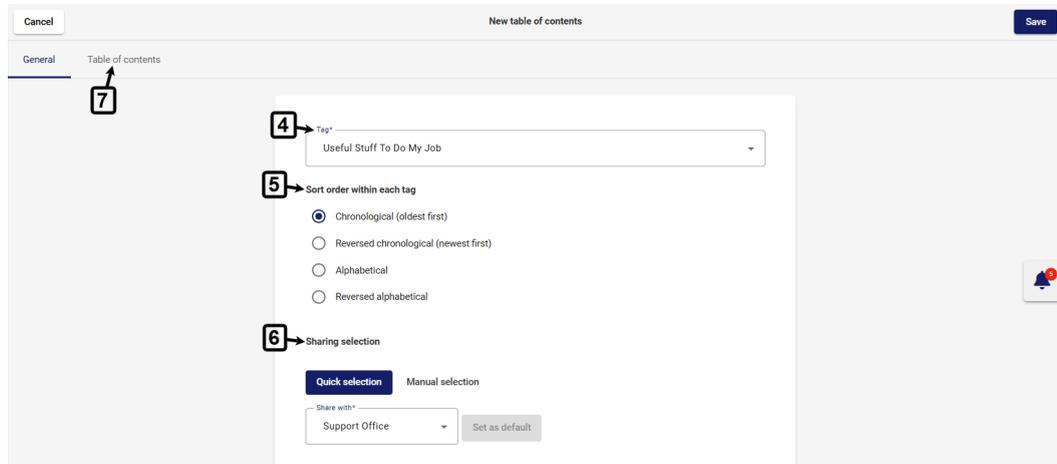
4. On the **General** tab, select the **Tag** for which you want to create the new table of contents.

The system will arrange all the pages and files associated with the selected tag in a table that you can view and manage on the **Table of contents** tab of the **New table of contents** page.

Note: You cannot create more than one table of contents for a particular tag. Therefore, you will not see those tags in the **Tag** dropdown options on **The new table of contents** page for which you or your colleagues have already created the table of contents. However, you can

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rearrange the sub tags or chapters of a saved table, its corresponding pages and files whenever you want. See the User Guide for **Manage the Saved Tables of Contents**

5. By default, pages and files in a table of contents are sorted in the Chronological (oldest first) order. You can change sorting on a TOC as follows:

- Reverse chronological (newest first)
- Alphabetical
- Reversed alphabetical

6. Select a **Sharing selection** for the new table of contents. See the User Guide for **Sharing Selection**

Note: The sharing selection for a table of contents does not apply to the tag for which you have created this table or the pages and files associated with that tag. You can choose different sharing selections for a table of content, its corresponding tag, pages and files.

However, if the pages or files associated with the selected tag are not shared with the selected users, then they cannot access these pages or files. The selected table of contents will only show links to the pages and files that are shared with the user who is viewing this table of contents. Therefore, different user profiles may have different views of a particular table of contents. A user can click and access any link available to them.

7. Now, go to the **Table of contents** tab of the **New table of contents** page and review all the listed pages and files.

On the **Table of contents** tab, all the pages and files will be listed under the single table if the selected tag has no sub tags.
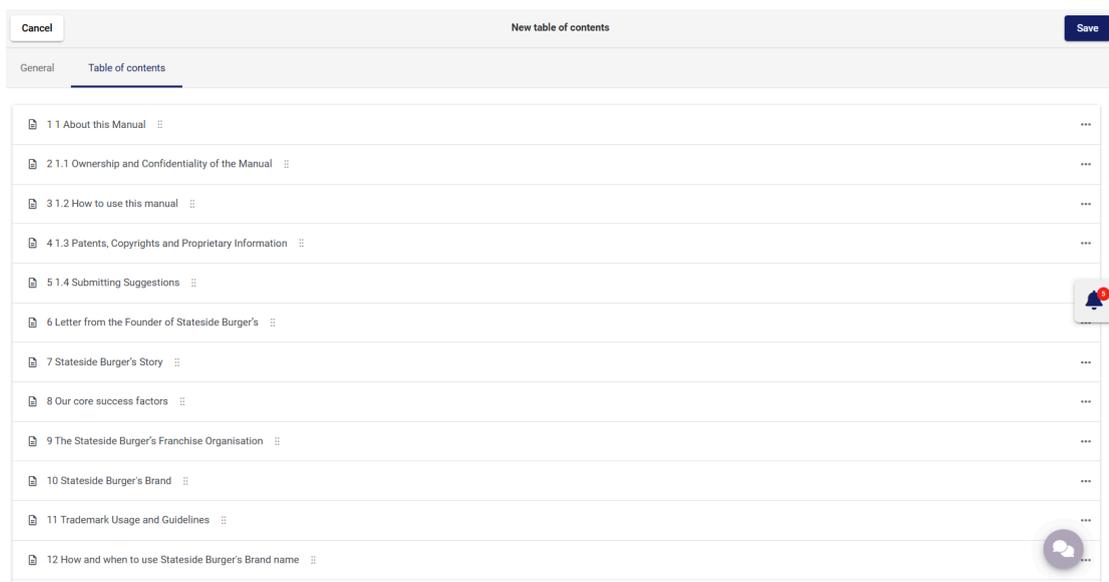
8. If the primary tag also has some sub tags and these sub tags have sub sub tags, then the pages and files associated with these tags will be listed under their respective sub tags and sub sub tags headings.

These sub tags and sub sub tags serve as separate chapters of the table and help you organise content on a table of content.
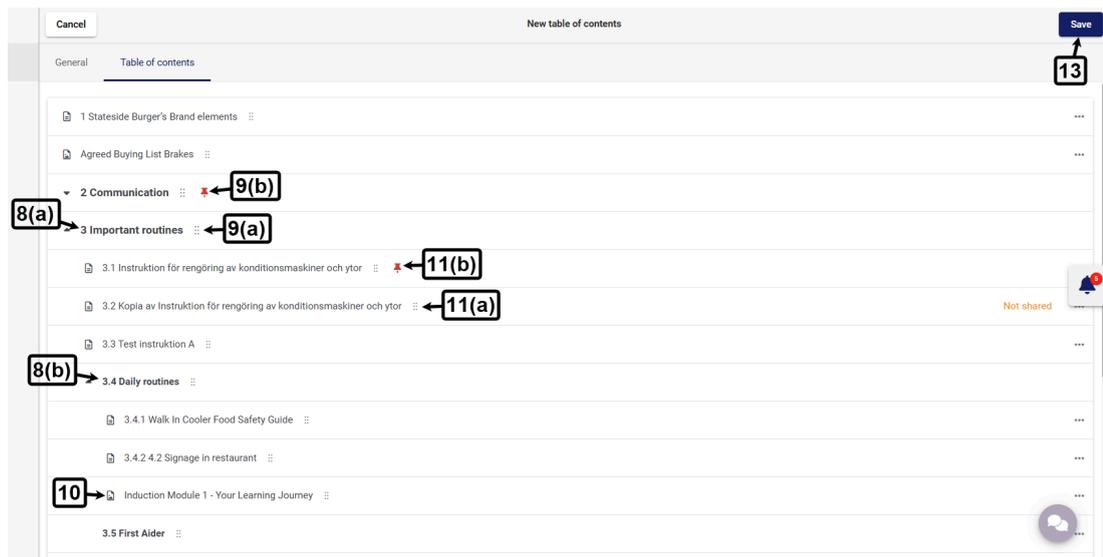
9. A numeric prefix will be added to each chapter name to show its position in the table. You can move a chapter up or down by clicking the **Drag indicator** icon next to its name and dragging it to the new position.

When you change the position of a chapter in the table, the numeric prefixes of all the chapters are automatically updated according to the new positions.

10. By default, the pages associated with a tag will be listed in the order you have selected for this table of contents. Refer to item 6 on this user guide for **Sorting order setting**

The same pattern will be followed for the listed files. However, the files will always be listed below the pages.

A numeric prefix will be added to each page name to show its position in a chapter or the main table. However, no such prefixes will be added to the names of files.

11. You can move a page or file up or down by clicking the **Drag indicator** icon next to its name and dragging it to the new position.

When you change the position of a page or file, it will be pinned to this position and will not follow the sorting order selected for this table of contents. The numeric prefixes of all the

pages in the respective chapter or main table will be automatically updated according to the pinned pages.

Remember, you cannot place a file above the pages in a chapter or the main table.

12. When you drag a page or file from one chapter and drop it to another chapter, the previous tag will be removed from the selected page/file and the new tag (where you have dropped it) will be added to it.
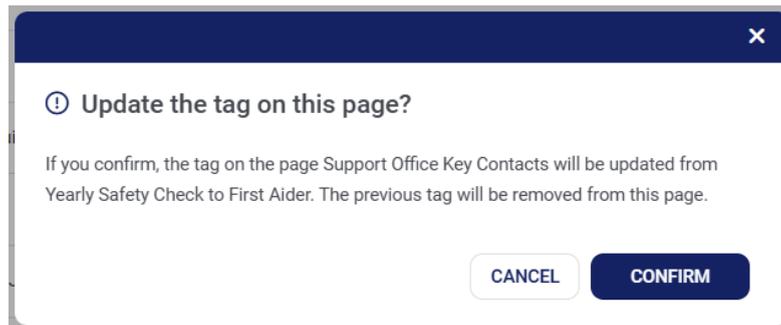
13. Once you have defined the position of all the chapters, their corresponding pages and files, click the **Save** button in the top-corner of the page to publish the new table of contents and share it with your selected colleagues.

How to Show/Share a Table of Contents

When you are done with the set-up of your T.o.C, it will still not be visible for any users in any other module other than the **Table of contents** tab on the **System setup** page. There are several options to show/share a T.o.C in other modules of your organization internet as follows:

1. Insert the T.o.C on a new or existing **Page** (See the User Guide for **Pages** and **Page Templates**)
2. Insert the T.o.C in a widget on the **Start Page** of your organization internet (See the User Guide for **Appearance**)
3. Insert the T.o.C in a widget on the **Sidebar** for **Pages** (See the User Guide for **Appearance**)

Manage the Saved Tables of Contents

On the **Table of contents** tab of the **System setup** page, you can view and edit the tables of contents created by you and your colleagues. You can also delete a table if it is no more important for your organization.

View the Saved Tables of Contents

1. Access the **Tables of contents** tab on the **System setup** page by following the navigation steps as demonstrated in the previous section.

2. On the **Tables of contents** page, you can view all the tables of contents created by you and the tables your colleagues have shared with you.

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

4. You can view the tag of each table, the name of your colleague who has created this table, when and who has last edited it.

5. Click a table of contents name or its tag to see its details.

This will open the selected table of contents page where you can view its chapters and their contents.

Review a Table of Contents

1. On the selected **table of contents** page, scroll down the page to review all the listed pages, files and their sharing status i.e. whether they are shared with you or not.

2. You can open a listed page or file from a table of content by clicking its name if you have access to this particular content item in its respective module.

3. However, you cannot open those pages and files that are **not shared with you**.

Important Tip: You can request the creator of the required page/file or another superior colleague to share it with you. <u>See the User Guide for **Messaging**</u>

Note: If a page or file has **Not shared** remark, this means you might have access to this content item but it's currently set to "Not shared" status. <u>See the user guides for **Sharing settings of Pages and Files**</u>

4. You can edit a table of contents by clicking the **Edit** button in the top-right corner of the page.
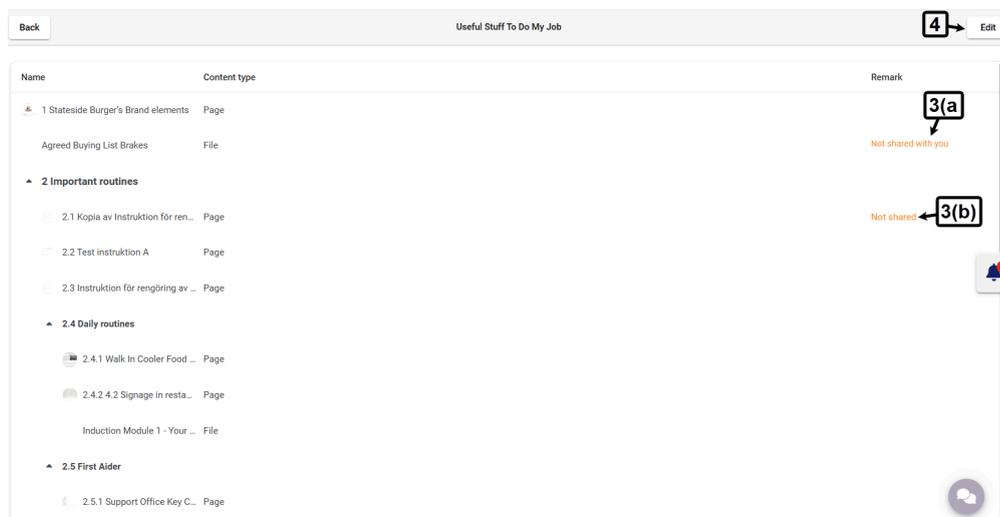
This will open the **Edit table of contents** page.

Edit a Table of Contents

Note: Users with appropriate access rights can also open the editor page of a table of contents from a page or widget where this T.o.C is embedded.
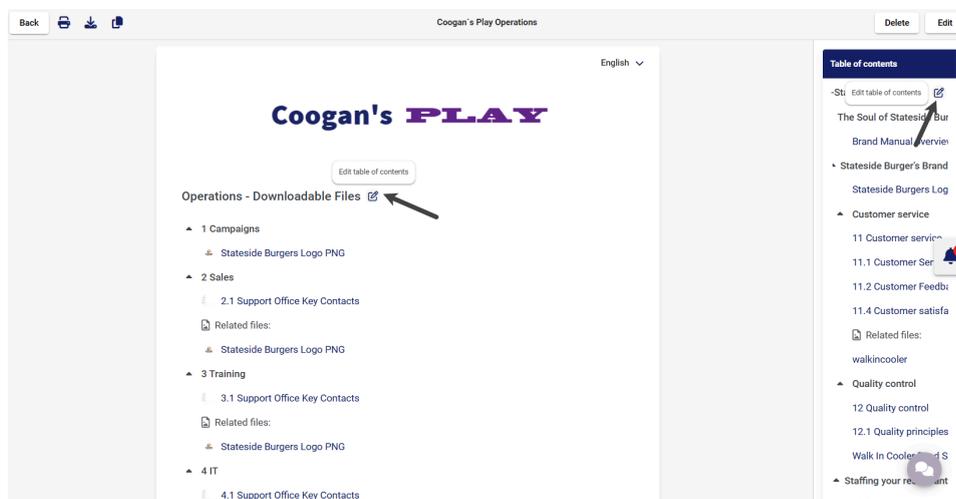
On the **Edit table of contents** page, you can edit the sharing selection and sorting order for a saved table of contents. Moreover, rearrange the chapters of a table, its corresponding pages and files on its Edit page.

You can also change the tag of a table of contents on its **Edit** page. However, this will remove all the contents associated with the previous tag from the table. The new pages and files associated with the newly selected tag will be loaded in the table instead.

Therefore, you should better avoid changing the tag of a table and consider creating a new table of contents with the new tag whenever it is required.

1. Now, make necessary changes on the **General** and **Table of Contents** tabs of the **Edit** page. See the User Guide for **Create a New Table of Contents**

2. Click the **Save** button in the top-right corner of the **Edit table of contents** page to save all the changes you have made.
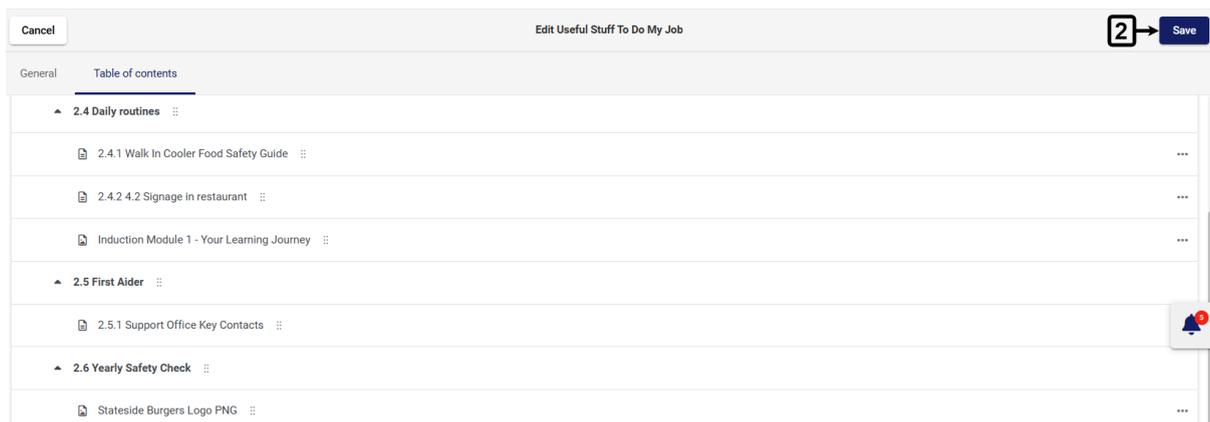
Delete a Table of Contents

Remember, there is no **Trash** folder for the **Table of Contents** module on the **Chainformation** platform from where you can restore a deleted table and its contents.

You can recreate a table of contents with the same tag after deleting a table. However, the system will not restore the sharing selection for the deleted table or any rearrangements of its contents that you may have made manually. See the User Guide for **Create a New Table of Contents**

Now, follow the navigation steps demonstrated below to delete a table of content if you really want to do so.
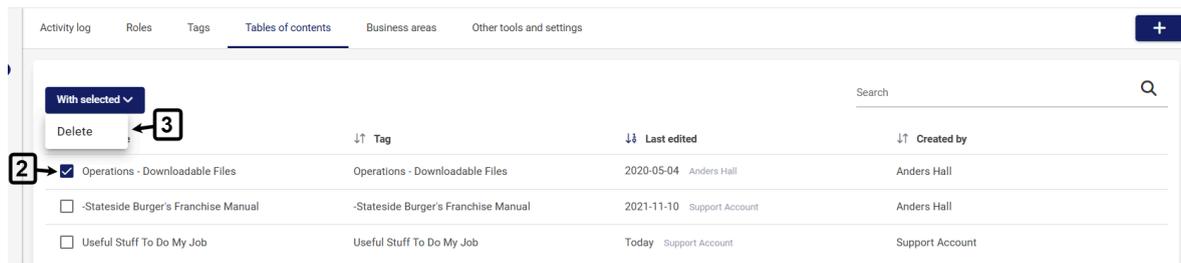
1. Access the **Tables of Contents** tab on the **System setup** page by following the navigation steps as demonstrated in the previous section.

2. On the **Tables of Contents** page, **check** the **checkbox** next to the name of the table or tables you want to delete.

3. Click the **Delete** button from the **With selected** menu above the list of tables.

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