

KNOWLEDGE FORUM® 4.7

L I T E

• Q U I C K R E F E R E N C E C A R D •

Note: In the *lite* version, you can not add authors, groups, or additional scaffolds. You should use the Basic or Enhanced version to set-up your database and then your users can use the *lite* version to add their ideas to the database.



SIGNING ON

To log into Knowledge Forum: *lite* version:

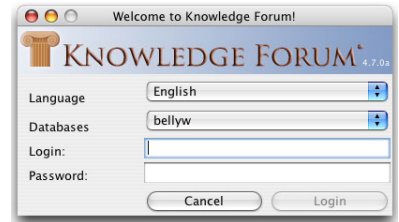
1. Type your Knowledge Forum URL address in your browser in the format:

`http://yourmachinename:port#/kForum`

The “Welcome to Knowledge Forum” window appears along with a KnowledgeForum.jnpl downloaded to your computer.

For your next log-in, you can either type URL address in your browser again or double-click the KnowledgeForum.jnpl.

2. Select a language from the **Language** drop-down list.
3. Select a database from the **Databases** drop-down list.
4. Type your username in the **Login** field.
5. Type your password in the **Password** field.
6. Click **Login**.



Knowledge Forum opens to a view.



A VIEW

View Link

Double click to go to view.

Toolbar

See below.

Note

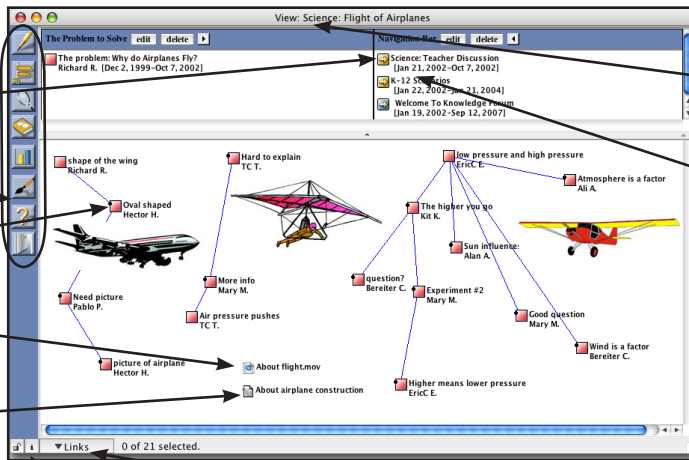
Double click to read note.

Movie

Double click to open.

Attachment

Double click to open.



View Title

View Headings
Highlight and organize selected objects.

Info

About the view.

Links Shows build-on or reference links.



THE TOOLBAR

New Note

To create a new note



View Finder

To find or create a view

Search

To search the database



Workspace

To access your Workspace

Assessment Tools

Available if tools have been added



Show/Hide Palette

To show or hide the drawing palette

Help

To get online help




Logout

To exit Knowledge Forum

Although the toolbar appears on every view, some buttons might not be available to you depending on your user type.



CREATING A NOTE

1. Click . The **New Note** window appears.
2. Complete the basic note features. You do not need to use every feature when creating a note. The basic note features consist of the note contents, problem, scaffolds, and keywords.
3. In the **File** menu, select **Save**. You will be prompted for a title for the note and you can select the view in which this note will appear. The note icon will be added to the view and the note window will remain open.

Click to access pull-down menus.

Shows authors and allows you to add co-authors.

Shows connections to other notes and views.

Type the problem.

Type content. Arrange movies, attachments, notes, and views by dragging and dropping.

Type in keywords.

Click to insert drawing in note.

After the note has been saved this will highlight. Click to create a build-on note.

Click to create an annotation.

Use keyword tool to select keywords in note contents.

Add scaffold supports:

- Select a scaffold from the **Scaffolds** drop-down list.
- Select a scaffold support by double-clicking the support, or click the **Add** button.

Knowledge Forum - File Edit Style Objects Publish Windows
New Note - Marge C.
Note Authors Connections Info History
Theory Building
My theory
I need to understand
New information
This theory cannot explain
A better theory
Putting our knowledge together
Add
Keywords
Insert Drawing Build-on Annotate Close



ATTACHMENTS AND MOVIES

To add movies and attachments (other documents or images) is to drag them from your desktop to a Knowledge Forum view or note. An image (jpg, png, or gif) can be displayed as an image by using the **Objects** pull-down list on the note or view and selecting **Show in Place**.



CONNECTING IDEAS

Referencing

A Whole Note

Drag and drop the note icon to reference into the content of the referencing note.

A Part of a Note (Quoting)

Open the referenced note and copy the text you wish to quote, then paste into the content of the referencing note.

A View

Drag and drop the view icon to reference into the content of the referencing note.

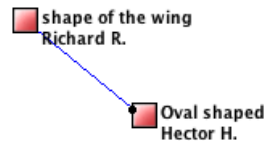
A Web Page

Type the Web link in http:// format in the content of the note.

Build-On

Open a saved note and click the **Build-on** button on the bottom of the note.

A build-on note will open. Add your ideas. When you save the build-on note, it will be connected to the note it was built on.




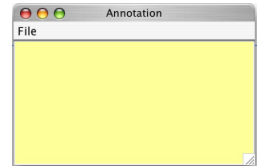
Co-Authors

If you are an author of a note, click the **Authors** tab on the top of the note. Add or remove authors to this note.

Annotate


Open a saved note and click the **Annotate** button on the bottom of the note.

An **Annotation** window will open. Type in your annotation. When you close and save it an **Annotation** icon  followed by the name of the author will appear in the note.



Rise-Above

From a view, select the notes you want to rise above (including notes from other users) and select

Rise-Above from the **Objects** pull-down list. A rise-above folder  will appear in the note containing the notes that were selected. Complete the creation of the new **Rise-Above** note.



WORKSPACE

Your **Workspace** is a private space where you can create and edit notes, work on a drawings, add attachments or movies that are only accessible by you. When you are done working on your ideas, you can add them to a view to make them accessible to the community by dragging and dropping them from your workspace to a view.



DRAWINGS


The **Palette** button shows and hides the drawing palette. Use this palette to create a drawing in a view or a note.

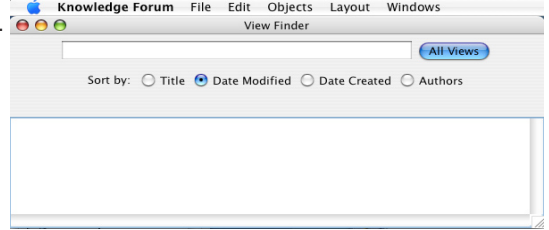
You can also drag and drop a jpg, png, or gif from your desktop to a view or note, then use the **Object** pull-down list to **Show in Place**.





THE VIEW FINDER

1. From a view, click  to access the **View Finder**.
2. Type in the name of the view you want to find or click **All Views**.
3. Drag and drop from the **View Finder** to a view to create a view link.



Creating a New View

1. In the **View Finder**, go to the **File** pull-down list and select New View.



CREATING A VIEW LINK

To create a view link in a view:

- Drag a view icon from the **View Finder** to a view or from a view to a note.

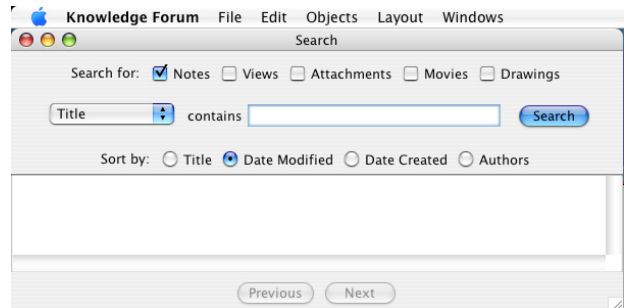


SEARCH

Search for objects by words, author, title, keyword, date modified or date created.

To perform a search:

1. Check or uncheck the **Notes**, **Views**, **Attachments**, **Movies** and **Drawings** check boxes to indicate the Knowledge Forum objects to search for.
2. Select the criterion from the **Search** drop-down list.
3. Type the search term in the text field.
4. Click **Search**.



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ENHANCED

• QUICK REFERENCE CARD •

SIGNING ON

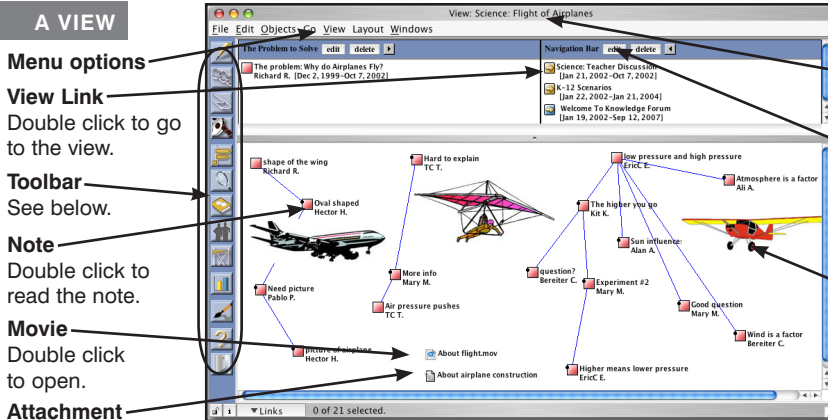


To log on to Knowledge Forum:

1. Type your Knowledge Forum URL address in *http://yourmachinename:port#* format in your browser. The “Welcome to Knowledge Forum” window appears.
2. Select a language from the **Language** drop-down list.
3. Select a database from the **Database** drop-down list.
4. Choose the **UI Mode**, Enhanced, to match this Quick Reference section.
5. Type your username in the **Username** field.
6. Type your password in the **Password** field.
7. Click **Sign On**.

Knowledge Forum opens to a view.

A VIEW



Menu options

View Link

Double click to go to the view.

Toolbar

See below.

Note

Double click to read the note.

Movie

Double click to open.

Attachment

Double click to open.

Info

About the view.

Links Shows build-on or reference links.

View Title

View Headings

Click to edit title.
Drag and drop objects to add to heading,

Attachment: Image
Shown in place.

THE TOOLBAR



New Note

To create a new note



New View Link

To add a view link to a view

New Attachment

To add an attachment to a view



New Movie

To add a movie to a view

View Finder

To find or create a view



Search

To search the database

Workspace

To access your Workspace



Authors

To add, or edit authors and groups.

Scaffolds

To view, add, or edit scaffolds



Show/Hide Palette

To show or hide the drawing palette.



Assessment Tools

Available if tools have been added

Help

To get online help




Logout

To exit Knowledge Forum

Although the toolbar appears on every view, some buttons might not be available to you depending on your user type.



CREATING A NOTE

1. Click . The **New Note** window appears.
2. Complete the basic note features. You do not need to use every feature when creating a note. The basic note features consist of the note contents, problem, scaffolds, and keywords.
3. In the **File** menu, select **Save**. You will be prompted for a title for the note and you can select the view in which this note will appear. The note icon will be added to the view and the note window will remain open.

Click to access pull-down menus.

Shows authors and allows you to add co-authors.

Shows connections to other notes and views.

Type the problem.

Type content. Arrange movies, attachments, notes, and views by dragging and dropping.

Add scaffold supports:

- Select a scaffold from the **Scaffolds** drop-down list.
- Select a scaffold support by double-clicking the support, or click the **Add** button.

Use keyword tool to select keywords in note contents.

Click to insert drawing in note.

After the note has been saved this will highlight. Click to create a build-on note.

Click to create an annotation.

Type in keywords.

Use keyword tool to select keywords in note contents.



ATTACHMENTS AND MOVIES

The easiest way to add movies and attachments (other documents or images) is to drag them from your desktop to a Knowledge Forum view or note. An image (jpg, png, or gif) can be displayed as an image by using the **Objects** pull-down list on the note or view and selecting **Show in Place**.

You can also add an attachment or movie using the  or  buttons on the toolbar.

To move an existing attachment or movie to a different view or note:

1. Use copy and paste from the **File** menu to copy the attachment and paste it in the new view or note.
- or
2. Drag and drop an attachment or movie icon from a view or note into the content field of your note.



CONNECTING IDEAS

Referencing

A Whole Note

Drag and drop the note icon to reference into the content of the referencing note.

A Part of a Note (Quoting)

Open the referenced note and copy the text you wish to quote, then paste into the content of the referencing note.

A View

Drag and drop the view icon to reference into the content of the referencing note.

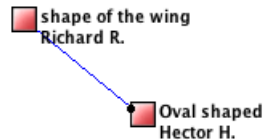
A Web Page

Type the Web link in http:// format in the content of the note.

Build-On

Open a saved note and click the **Build-on** button on the bottom of the note.

A build-on note will open. Add your ideas. When you save the build-on note, it will be connected to the note it was built on.




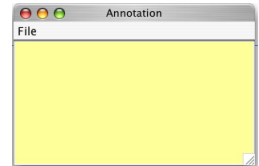
Co-Authors

If you are an author of a note, click the **Authors** tab on the top of the note. Add or remove authors to this note.

Annotate


Open a saved note and click the **Annotate** button on the bottom of the note.

An **Annotation** window will open. Type in your annotation. When you close and save it an **Annotation** icon  followed by the name of the author will appear in the note.



Rise-Above

From a view, select the notes you want to rise above (including notes from other users) and select

Rise-Above from the **Objects** pull-down list. A rise-above folder  will appear in the note containing the notes that were selected. Complete the creation of the new **Rise-Above** note.



WORKSPACE

Your **Workspace** is a private space where you can create and edit notes, work on a drawings, add attachments or movies that are only accessible by you. When you are done working on your ideas, you can add them to a view to make them accessible to the community by dragging and dropping them from your workspace to a view.



DRAWINGS



The **Palette** button shows and hides the drawing palette. Use this palette to create a drawing in a view or a note.

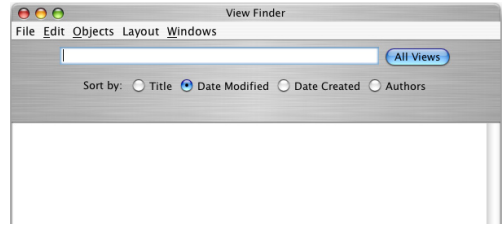
You can also drag and drop a jpg, png, or gif from your desktop to a view or note, then use the **Object** pull-down list to **Show in Place**.





THE VIEW FINDER

1. From a view, click  to access the **View Finder**.
2. Type in the name of the view you want to find or click .
3. Drag and drop from the **View Finder** to a view to create a view link.



Creating a New View

1. In the **View Finder**, go to the **File** pull-down list and select New View.




CREATING A VIEW LINK

To create a view link in a view:

- Drag a view icon from the **View Finder** to a view or from a view to a note.

or

1. Click . The New View Link window appears.
2. Select the view to link to from the **Choose a view** drop-down list.

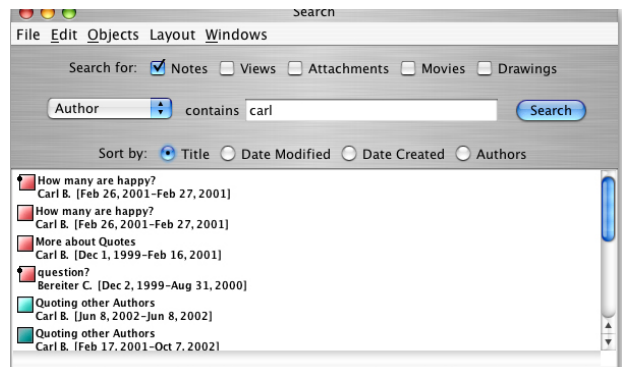


SEARCH

Search for objects by words, author, title, keyword, date modified or date created.

To perform a search:

1. Check or uncheck the **Notes**, **Views**, **Attachments**, **Movies** and **Drawings** check boxes to indicate the Knowledge Forum objects to search for.
2. Select the criterion from the **Search** drop-down list.
3. Type the search term in the text field.
4. Click **Search**.



KNOWLEDGE FORUM® 4.7

BASIC

• QUICK REFERENCE CARD •

SIGNING ON



To log on to Knowledge Forum:

1. Type your Knowledge Forum URL address in *http://yourmachinename:port#/* format in your browser. The “Welcome to Knowledge Forum” window appears.
2. Select a language from the **Language** drop-down list.
3. Select a database from the **Database** drop-down list.
4. Choose the **UI Mode**, Basic, to match this Quick Reference section.
5. Type your username in the **Username** field.
6. Type your password in the **Password** field.
7. Click **Sign On**.

Knowledge Forum opens to a view.

A VIEW



View Title

View Link
Click to go to view.

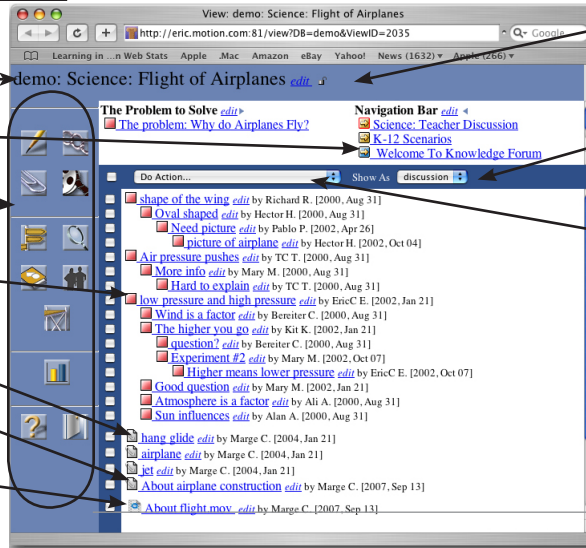
Toolbar
See below.

Note
Click to read note.

Picture
Click to open.

Attachment
Click to open.

Movie
Click to open.

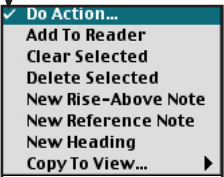


View Headings

Highlight and organize selected objects.

Select option for displaying notes in the view.

The **Do Action** drop-down list allows you to move or clear selected objects, and create headings.



THE TOOLBAR



New Note
To create a new note

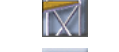
New Attachment
To add an attachment to a view

View List
To find or create a view

Workspace/Reader
To access your Workspace

Scaffolds
To view, add, or edit scaffolds

Help
To get online help



New View Link
To add a view link to a view

New Movie
To add a movie to a view

Search
To search the database

Authors
To view, add, or edit authors, groups, and registration codes


Assessment Tools
Available if tools have been added

Logout
To exit Knowledge Forum

Although the toolbar appears on every view, some buttons might not be available to you depending on your user type.



CREATING A NOTE

1. Click . The New Note window appears.
2. Complete the basic note features. You do not need to use every feature when creating a note. The basic note features consist of the **Title**, **In View**, **Scaffold**, **Content**, **Reference**, **Keywords**, and **Problem** sections.
3. Click **Advanced** to access the advanced note features. You do not need to use the advanced features to create a note. In advanced mode, you can add co-authors, hide or display image attachments, and nominate a note for publication.
4. Click **Close and Contribute**.
The note appears in read mode as it is added to the view.

Type the note's title.

Add scaffold supports:

- Select a scaffold from the **Scaffolds** drop-down list.
- Select a scaffold support from the **Scaffold** list box.
- Click **Add**.
- Type the scaffold support text in the **Content** field between the > < symbols of the scaffold support's HTML code.

Click to access the advanced note features.

Click to save the note and close the window.

Select the view to add the note to.

Type content.

Select a note, view, attachment, or movie to reference from the corresponding **Reference** drop-down list.

Type the keywords.

Type the problem.

Content

```
<kf:support support="New information" ID="10">Enter text here.</kf:support>
```



REFERENCING

Whole Note

Select the note to reference from the **Note** drop-down list in the **Reference** section of the referencing note.

Part of a Note (Quoting)

Open the referenced note and copy and paste the text you wish to quote between the > < symbols in the **Content** field of the referencing note.

View

Select the view to reference from the **View** drop-down list in the **Reference** section of the referencing note.

Web Page

Type the Web link in http:// format in the **Content** field of the note.

Movie Segment

Open the movie. Set the start and end points of the movie segment and click **Produce Movie Segment**. Copy the movie segment's HTML code into the **Content** field of the referencing note.

HTML code for each reference will be added to the **Content** field of your note.



CONNECTING IDEAS

In addition to referencing, you can connect ideas in Knowledge Forum using several different methods.

Rise-Above Note

From a view, check the notes you want to rise above (including notes from other users) and select **New Rise-Above** from the **Do Action** drop-down list.

Complete the creation of the new rise-above note.

Build-On Note

In read mode, click **Build-on** in the note you want to build on. Complete the creation of the build-on note.

Co-Authors

In advanced mode, add or remove authors from the **Authors** section of the note.

Publish

In advanced mode, click the **Candidate for Publication** check box.


Annotate

In read mode, click **Annotate** and type your annotation in the **Annotation** field of the New Annotation window.



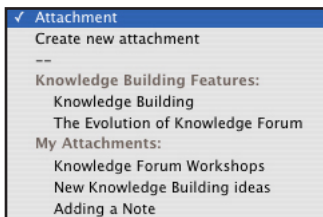
ATTACHMENTS

To add an attachment to a view:

1. Click . The New Attachment window appears.
2. Type the title in the **Title** field.
3. Click **Choose File**. The Open window appears.
4. Select the file to attach.
5. Click **Choose**.
6. In the New Attachment window, select the view to add the attachment to.
7. Click **Close and Contribute**.

To add a new attachment to a note:

1. Select **Create new attachment** from the **Attachment** drop-down list in the **Reference** section. The New Attachment window appears.
2. Complete the New Attachment window.
3. Click **Close and Contribute** to save the note.



Attachment drop-down list


To add an existing attachment to a note:

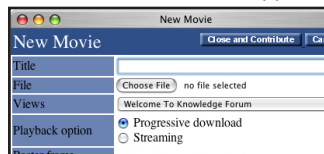
1. Select an attachment from the **Attachment** drop-down list in the **Reference** section.
2. Click **Close and Contribute**.



MOVIES

To add a movie to a view:

1. Click . The New Movie window appears.
2. Type the title in the **Title** field.
3. Click **Choose File** next to the **File** field. The Open window appears.



4. Select the movie file to attach.
5. Click **Choose**.
6. In the New Movie window, select the view to add the movie to.
7. Select the playback option.
8. If you want to add a poster frame:
 - Click **Choose File** next to the **Poster frame**. The Open window appears.
 - Select a .jpg file to associate with the movie. Click **Choose**.
9. In the New Movie window, click **Close and Contribute**.

To add a new movie to a note:

1. Select **Create new movie** from the **Movie** drop-down list in the **Reference** section. The New Movie window appears.
2. Complete the New Movie window.
3. Click **Close and Contribute** to save the note.


To add an existing movie to a note:

1. Select a movie from the **Movie** drop-down list in the **Reference** section.
2. Click **Close and Contribute**.

CREATING A VIEW LINK




To create a view link in a view:

1. Click . The New View Link window appears.
2. Select the view to link to from the **Choose a view** drop-down list.

THE VIEW LIST



From a view, click  to access the View List window.

Copy selected view links to My Hotlist or other views by using the **Do Action** drop-down list.

Click the check box to select the view link.

Click the view link to access the view.



Select the type of views to display from the **Show** drop-down list.

Click to create a new view.

SEARCHING



Search for objects by text in the object body, author, keyword, note title, view title, problem, scaffold support, user group, date created, date last modified, unread, references to your notes, and, for editors and managers, status and accessibility. The initial criterion chosen will determine the remaining **Search** fields available.

To perform a search:

1. Check or uncheck the **Notes**, **Views**, **Attachments**, and **Movies** check boxes to indicate the Knowledge Forum objects to search for.
2. Select the initial criterion from the first **Search** drop-down list.
3. Select from the second **Search** drop-down list (if applicable).
4. Either type the search term in the text field or select from the third drop-down list (if applicable).
5. Click **Find**.

Saved searches listed for future use.

Increase the number of search criteria to narrow the search.



Set notification in order to receive e-mail with updated search results.

Save search criteria.

