

# 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.jnlp downloaded to your computer.

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

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

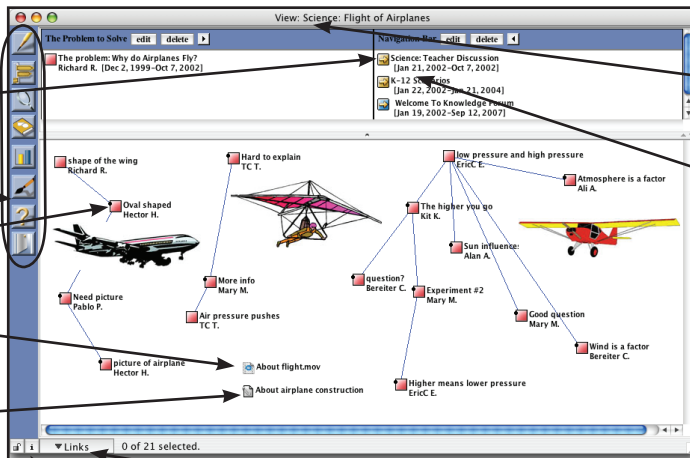
Double click to read note.

#### 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 Workspacer

#### Assessment Tools

To access third party applets



#### 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.

The screenshot shows the 'New Note' window in Knowledge Forum. The window title is 'New Note - Marge C.'. The menu bar includes 'File', 'Edit', 'Style', 'Objects', 'Publish', and 'Windows'. Below the menu bar are tabs for 'Note', 'Authors', 'Connections', 'Info', and 'History'. The main area is divided into sections: 'Theory Building' (with a dropdown menu), 'Problem', and 'Keywords'. The 'Theory Building' section has a list of scaffolds: 'My theory', 'I need to understand', 'New information', 'This theory cannot explain', 'A better theory', and 'Putting our knowledge together'. Below this list is an 'Add' button. The 'Problem' section is a large text area. The 'Keywords' section has a text input field and an 'Add' button. At the bottom of the window are buttons for 'Insert Drawing', 'Build-on', 'Annotate', and 'Close'.

Annotations and their descriptions:

- Click to access pull-down menus.** (Points to the Theory Building dropdown)
- Shows authors and allows you to add co-authors.** (Points to the Authors tab)
- Shows connections to other notes and views.** (Points to the Connections tab)
- Shows authors, last date modified, and a link to Note history.** (Points to the Info tab)
- Type the problem.** (Points to the Problem text area)
- Type content. Arrange movies, attachment notes, and views by dragging and dropping.** (Points to the main text area)
- Type in keywords.** (Points to the Keywords input field)
- Click to insert drawing in note.** (Points to the Insert Drawing button)
- After the note has been saved this will highlight. Click to create a build-on note.** (Points to the Build-on button)
- Click to create an annotation.** (Points to the Annotate button)
- Use keyword tool to select keywords in note contents.** (Points to the Keywords input field)
- 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.



## 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.

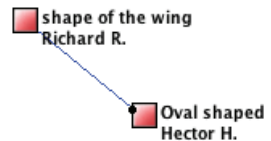
#### A Web Page

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.




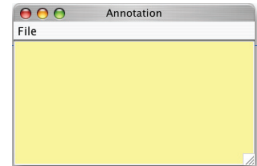
### Co-Authors

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 the view to make them accessible to the community by dragging and dropping them from your workspace to the view.



## DRAWINGS



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

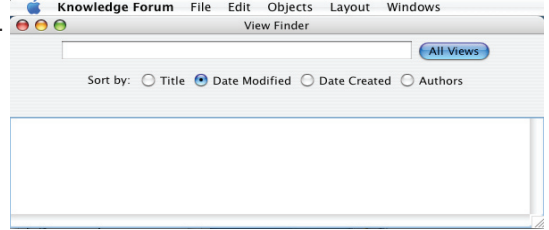
You can also drag and drop a jpg, png, or gif from your desktop to a view or note, then use the **Object** pull-down list to **Show in Place**.





## 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 **Edit** 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.

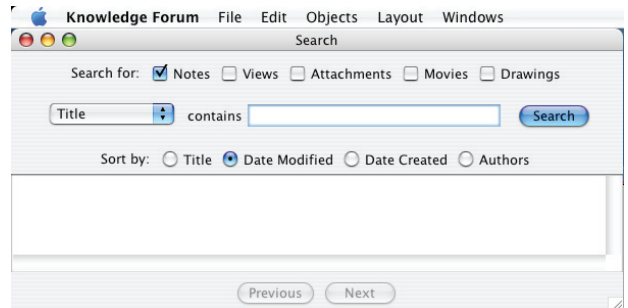


## SEARCH

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 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 **Search**.



# KNOWLEDGE FORUM® 4.7

## ENHANCED

### • QUICK REFERENCE CARD •

#### SIGNING ON

Welcome to Knowledge Forum

Register for a username...

Language:

Database:

UI Mode:

Enter a username

Enter a password

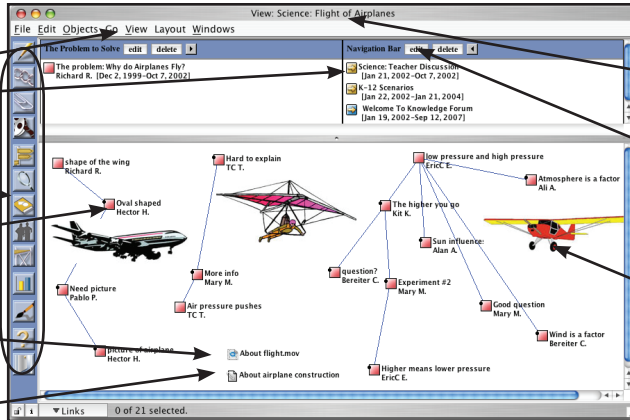
www.KnowledgeForum.com  
Credits

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**

To access third party applets



**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.

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.

Click to access pull-down menus.

Shows authors and allows you to add co-authors.

Shows connections to other notes and views.

Shows authors, last date modified, and a link to Note history.

Type the problem.

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

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.



### 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.

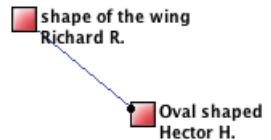
#### A Web Page

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.




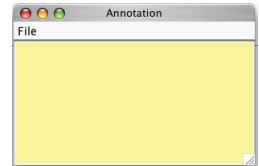
### Co-Authors

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 the view to make them accessible to the community by dragging and dropping them from your workspace to the view.



## DRAWINGS



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

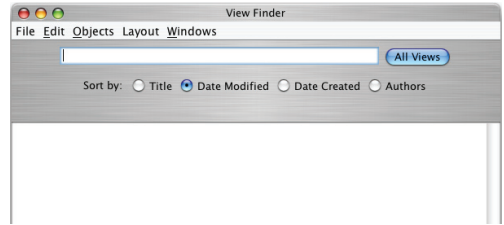
You can also drag and drop a jpg, png, or gif from your desktop to a view or note, then use the **Object** pull-down list to **Show in Place**.





## 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 **Edit** 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.

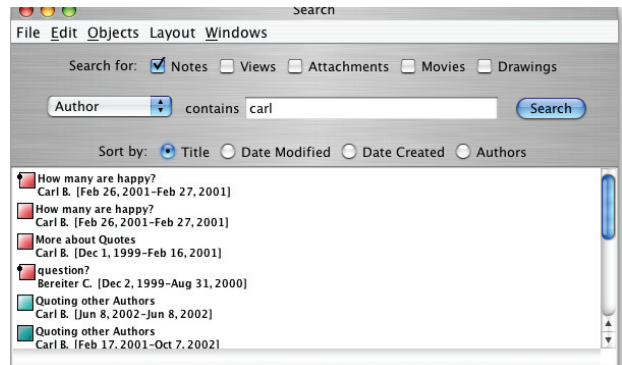


## SEARCH

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 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 **Search**.





# KNOWLEDGE FORUM® 4.7

## BASIC

### • QUICK REFERENCE CARD •

#### SIGNING ON



Welcome to Knowledge Forum  
Register for a username...

Language: English  
Database: Demo  
UI Mode: Basic

Enter a username  
Enter a password

Sign On

www.KnowledgeForum.com  
Credits

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

##### Note

Click to read note.

##### Attachment

Click to open.

##### Movie

Click to open

##### Picture

Click to open.

##### View Link

Click to go to view.

##### Toolbar

See below.

##### 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 View Link

To add a view link to a view

##### New Attachment

To add an attachment to a view



To add a movie to a view

##### View List

To find or create a view



##### Search

To search the database

##### My Reader

To access My Reader



##### Authors

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

##### Scaffolds

To view, add, or edit scaffolds



##### Applet List

To access third party applets

##### Help

To get online help




##### Logout

To exit Knowledge Forum

While the toolbar appears on every view, some buttons may 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.



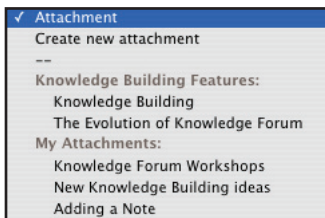
## ATTACHMENTS

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:

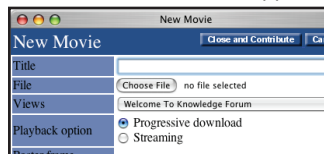
1. Select an attachment from the **Attachment** drop-down list in the **Reference** section.
2. Click **Close and Contribute**.



## 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.

