PANTOTO

TUTORIAL

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1 The Tutorial

This document illustrates how Pantoto can be used by individuals, groups and organisations to build their information and communication management system. The target audience of this tutorial is anyone who is interested in using Pantoto. Familiarity with the Internet and any web browser is highly recommended. Knowledge of HTML is optional.

The tutorial uses the example of a fictitious organisation to illustrate the various applications of Pantoto.

2 Pantoto Objective

Pantoto was designed to create a sustainable and participatory online community of individuals, groups or organisations, who share a common interest or cause. By managing their information and communication themselves, the community will have the ownership and will be able to sustain it. The participatory nature will help the community grow organically.

3 What is a Pantoto online community?

A Pantoto online community, in very broad terms consists of members of an organization or business and the information that they contribute. As in the real world, members have online representations called Personas. The information that members contribute within the community is in the form information units called Pagelets. A Pagelet is a web page with information relevant to a context. All Pagelets within the Pantoto community are organised by categories.

The remainder of this document describes how Pantoto creates an online community.

4 The Case Study

The Centre for Training and Research

Established in 1990, The Centre for Training and Research (TCTR) is the premier training Institution in the country. TCTR is a non-profit registered society. It has created a niche for itself in the domain of training. In the last twelve years it has played a vital role in making training modules more accessible to Indian corporate as well as to the non-profit sector. In the last twelve years it has focused its energies on helping the social sector develop quality trainers. They have created and deployed over 1200 training modules for the social sector alone. The research wing of TCTR looks at the evolving needs of Indian corporate and the Indian social sector. Training, methodologies and tools that have been developed, and tested through the research centre are now being used internationally. The team at the research cell has now focused its energies on explicating the wealth of knowledge amongst the community of trainers in India.

4.1 A meta-level description of the organisation

- Small to medium sized (with a team of 20 employees who are on the payrolls of the organisation)
- Has a team that extends beyond its own organisation (in the form of trainers registered with the organisation)
- Operations are spread throughout the country (a small team will go out on demand to any location in the country to conduct a workshop).
- Has a substantial quantity of material that it wants to make available to trainers across the country.

4.2 The Needs of the organisation

1. To create a low-cost and continuous online presence.
2. To make the repository of knowledge that it holds, available to the trainer community in India.
3. To create a repository of resource material and information on training with contributions from trainers all over the country.
4. To take recruitment for the organisation online.
5. To allow members to interact and get to know the team at TCTR online.
6. To create a community for trainers
    a. That is an online community space for anybody interested in training
    b. That generates greater visibility for TCTR as experts in the domain of training.
7. To create a forum where modules can be submitted by trainers for review by peers and senior colleagues in the domain of training.

The organisation needed an IT solution that would:

- **Be easy to maintain**
- **Would be flexible**
- **User Friendly/Accessible to all stakeholders**

The software should be able to keep pace with growth of the organisation and the growing quantum of information that it needs to manage.

8. To make specific training modules available online.

4.3 The Structure of the Organisation

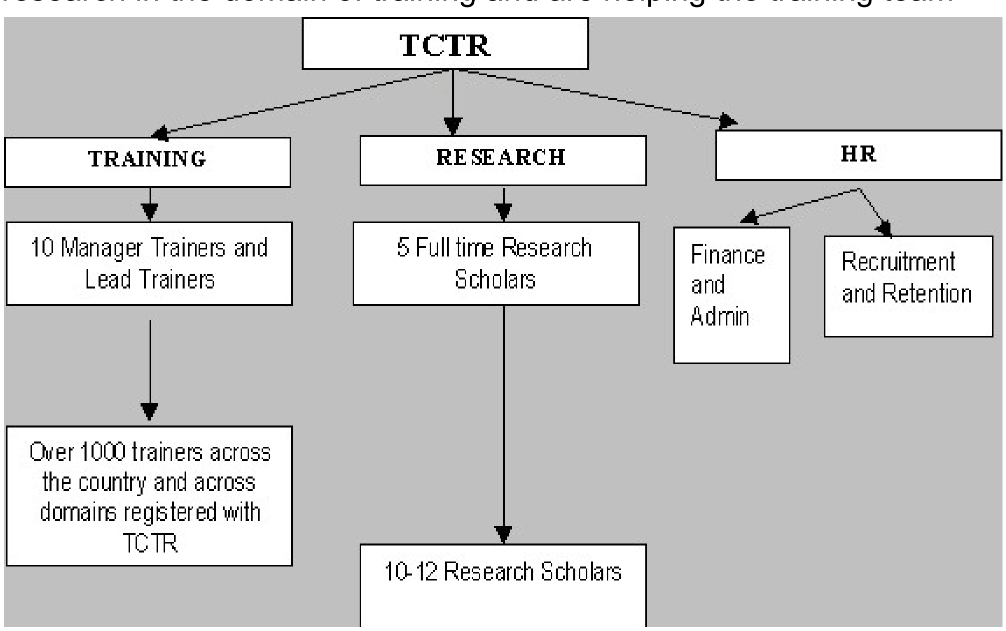
TCTR has three core functional departments.

1. **HR:** Unlike other organisations, HR is not only responsible for recruitment and retention but also has under its wing the administrative and financial functions of the organisation. The team has five people. Shyam T, who carries the designation of COO, heads this team.

2. **TRAINING:** A core activity of TCTR, this is the largest team within the organisation. It has ten members each of which handle a different area of training. Each member has his or her own specialisation. The role of this department can be split into following categories:
   a. Conduct training workshops.
   b. Train other trainers in their area of specialisation
   c. Create and develop modules to meet the changing needs of the sectors to which they cater.
   d. Market the modules and services of TCTR.
   e.

   Anand Bala is the designated COO of this particular team. He has the onus of ensuring that the organisation receives the visibility that it deserves in the area of training and that he is able to cater to the problems and issues that the trainer community, registered with TCTR, raises.

3. **RESEARCH:** Deepthi Darshini leads this team. She carries the designation of COO and manages a team of 5 employees. In addition to this team Deepthi has at any time 10 to 12 research scholars who are working on specific areas of research in the domain of training and are helping the training team



4. compile resource material and develop training modules.

4.4 The Solution

- While it might not be the case with all organisations, in the case of TCTR it was appropriate to create information architecture very similar to their organisational hierarchy.

- The COOs would take collective responsibility for the overall management of the online community.

- However the responsibility of managing and driving sub-communities would rest with specific individual/experts within the organisation. The management of the TCTR online community would therefore be a shared responsibility.

5 Defining the TCTR Community

Before actually installing and running Pantoto, the COOs facilitated an exercise within their teams to define what the TCTR community would do. In the long run, this helps each individual within the organisation to take ownership of his or her part in the community.

5.1 What type of a community will the TCTR be?

- It will be an online community
- It will be a growing community, with an increasing number of participants and growing quantum of training related content being made available.
- It will be a transparent community, with users being aware of contributions from other members

5.2 Why build this community?

- To create a forum where trainers and other stakeholders can interact and make use of the vast repository of knowledge available with TCTR
- To allow for greater visibility for TCTR in the domain of training
- To allow the general public to find training resources.

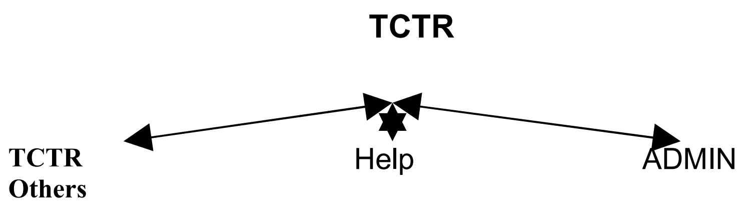
5.3 Who are we building this community for?

- The employees at TCTR, who can present their profiles and provide visibility for their work.
- The Trainers, who are registered with TCTR and are currently carrying out training workshops for TCTR.
- The larger community of trainers in India.
- People, organisations and groups who are in need of specific training solutions.
- HR activities and similar typical MIS needs of the organisation.

6 Deploying the Community

Our starting point is a set-up created by the installation of the Pantoto software from the CD provided by Servelots Infotech. Servelots infotech is the software development company responsible for creating Pantoto. After the installation, four Categories will be automatically created (at installation) for TCTR. We will deal with the content of these categories at a later stage[1].

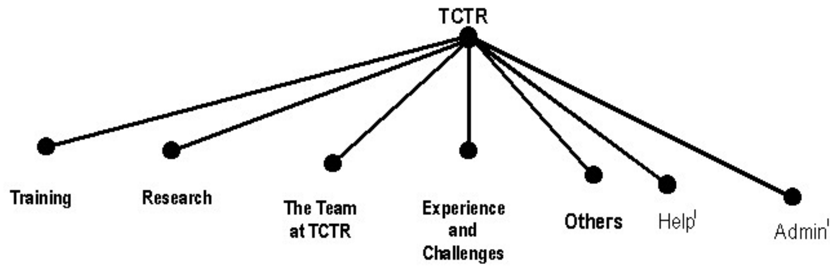
At this stage the online Community called TCTR will have the following structure:



Anand, Shyam and Deepthi take on the role of *editors* of the initial community set-up. They are responsible for nurturing the community. The group of COOs went on to identify the categories that they would build under the community of TCTR:

1. **Training**
   A community targeted at Trainers.
   Will be managed by Anand and his team, with Anand as the editor.
2. **Research**
   Targeted at researchers in the domain of training both within and outside TCTR
   Will be managed by Deepthi and her team with Deepthi as the editor.
3. **The Team at TCTR**
   For the benefit of the employees in general, and for the visitor who wants to know more about TCTR.
   Will be managed by Shyam and his team with Shyam as the editor.
4. **Challenges and Experiences**
   Targeted specifically at trainers and how they can cope with common problems and challenges.
   Will be managed by Suzan, a member of the training team, and a specialist in the area of training design and training techniques. Suzan will be the editor of this Category.

[1] On Installing four Categories will be automatically created for TCTR:
TCTR
TCTR > ADMIN
A category related to administrative properties that can be accessed only by the Super Tree Master.
TCTR > Pantoto Help
A repository of Pagelets that describe the use of the system.
TCTR > Others (TCTR)
A forum where information that is directly relevant to the TCTR community but does not find a place in any of the other categories will be available for community members to see.


TCTR
Training
Research
The Team at TCTR
Experience and Challenges
Others
Help'
Admin'

7 Registration

The team at TCTR and their community members will have to register onto Pantoto to use its features.

Note:

- In order to effectively use Pantoto, every user must register. The registration process is similar to most online registration forms.
- Once registered, a user can:
    - Post Pagelets in a particular Category
    - Acquire the authority to create, maintain and edit categories
    - Modify the Pagelets that s/he created
    - Create Personas and Groups
    - Create and maintain Locations
    - View requests and responses.

Each one of the above listed features is covered in detail in various sections of the document.

7.1 How do you register on Pantoto?

- Once Pantoto is installed on your server, go to the home page and click on **Sign In**.
- On the Sign In page, click on **Register Now** to get a user id.
- This opens a simple form that is similar to most online registration forms.
- There are instructions against every field of the registration form
- The user ID is your unique ID every time you log into Pantoto.
- Your user ID becomes one of your Personas on Pantoto. (For more on Personas please read the next section of the document).
- To access the Online Pantoto community please remember your User Id and Password. In case you forget your password you can use the “password look-up” feature on the home page.

8 Pantoto Terms

Before proceeding further, we need to be familiar with these terms and their meanings. Each term is explained in detail with examples in the next section.

8.1 What is a Persona

- A Persona is a name with a profile.
- Personas are the online representations for individuals or groups.
- Personas create and post Pagelets and communicate with other Personas.

8.2 What is a Pagelet?

A Pagelet is an information unit that has a communication wrapper. When published a Pagelet is like a 'leaflet' on the web with a well-defined structure. The structure of the Pagelet is designed and defined by the editor of a Category. All information in categories is available in the form of Pagelets.

Pagelets allow communities to collect context specific information and e-nables information centric communication

8.3 What is a Category?

Categories allow for the organisation of information. Categories allow users to publish information in an online space where it can be readily found within a particular context.

As the name suggests a Category contains, information about a particular theme, subject, topic etc. All information in a Category is in the form of Pagelets. Categories taken on a hierarchical structure, in the sense that every Category is related to a parent Category and can have several Sub-Categories.

8.4 What is a Template?

A template is a structure or pattern or that is used to build a particular Pagelet. The template defines the form that the user will fill-out when creating a Pagelet. A template gives the flexibility of being able to store and display the information as per one's need.

Templates define the kind of information that is desired in a Pagelet. These structure definitions are called Pagelet Templates and are define by the editor of the Category.

8.5 Who is an Editor?

An editor is responsible for the over all maintenance of a Category and its Sub Categories. An editor can either be a group or an individual.

An editor can create and maintain Sub Categories; accept requests and create Sub Categories; and create and modify templates for the Category and Sub Categories of which s/he is an editor.

9 Personas

Personas are the online representations for individuals or groups. Its similar to a role a person performs in the real physical world. A Persona is a name with a profile. We can think of the Persona as an online identity. Personas create and post Pagelets and communicate with other Personas

A user may have several Personas to accommodate for the different roles they play within Pantoto community. *For example a person may can be a trainer and as well as an evaluator of research papers.*

The communication (messages), information (Pagelets), and the Pantoto community structure (Categories) are all created by a Persona. All Pagelets and communication are stored in **My Space**.

How do you create a Persona?

An initial persona is created during registration. A user can create Personas as follows:

- Go to **My Space**
- Click on **My Personas**.
- In the screen that follows click on **Create new persona**.
- This opens a form, which asks for details of the persona that is being created.
- After entering the relevant details click on **Create.**

A user can switch between personas by using the drop down that appear at the top of the **My Space**.

9.1 Group Persona

A Group persona is a persona that is assigned to several users. *There are three people who are responsible for the logistics of conducting training programmes. All the communication and the Pagelets that are posted by them are through one persona – e.g. Workshop Logistics.*

Several personas can be collected under a Group persona. Group personas allow for collective representation. All communication and information creation is shared. For example, editors who are well suited to be Group personas share the responsibility of managing a Category.

Within a community a group of user may want to come together under one Persona. For example all the administrative staff at TCTR could use one Persona.

How do you create a Group persona?

1. Click on **My Space>My Persona>Create New Group.**
2. Give a name to the group
3. Describe the group and enter the specialisation of the group
4. Tick the names of the other members of the group (all names that have been book-marked will appear in a list)
5. Once the form is completed click on **Create**.
6. On creation, an invitation will be sent to the members to join the group.
7. Recipients of the invitation can accept or deny the invitation in **My Space > My Persona**
8. A member of a group can also unsubscribe from a group from **My Space>My Persona**

9.2 Editor personas

Editor personas have higher commitments and responsibilities within a Pantoto community.
An editor Persona is one with editor rights.

Editors are Personas that have additional responsibilities and authority in a community. Editors have an additional tab called **Editor Task**.

Editor Personas are responsible for:

- Creation and Maintenance of categories.
- Creating and modifying Templates
- Responsible for delegating editorship rights to others.

10 The Editor

10.1 What are the functions of an editor?

An editor can:

a. Create and Maintain sub-categories
b. Accept requests and create sub-categories
c. Create and modify templates for the Category and Sub Categories of which s/he is an editor.

10.2 How do I become an Editor?

To become an editor the user has to send a request.
When requesting for a Category creation a user can also request for editor rights.
To carry out your functions as an Editor, click on the **Editor Task** tab. A request for Category creation can be accepted or rejected by the editor of a parent Category.

How do you send a request?

To request for a new Category to be created

1. Go to **My Space> My Requests**
2. Click on **New Category**
3. Fill in the desired Category name and the Category under which you want it to be placed and the reason why you think it is needed.
4. Indicate whether or not you want to be the editor of the Category
5. Click **Submit** and the request will be sent.
6. If an editor accepts a request a new Category will be created.
7. You can find the status of all your requests under **My Space > My Requests**.

The editor of a Category can either be a group of people (Group persona) or an individual. As an editor, one has certain specific rights over the Category:

- Create Sub Categories
- Delegate editor rights
- Maintain information in Categories

Renu heads the team that looks after training modules that equip trainers. The ideal place for this sub-Category would be under the parent Category "Training". To do this

- *First sends a request to create a Sub Categories under "Training" called "Training the Trainer"*
- *In the request she indicated the reasons why she wanted the Category to be created.*
- *The request clearly indicates what the parent Category would be (in this case it is "TRAINER") and also the request for editor rights over the Category.*
- *Anand being the Editor of the parent Category "Training" reviews the request and **Accept** it. He delegates the editorship of this Sub Categories to Renu.*

Subsequent to this, her colleague Arun voluntarily decided to create a repository of trainers. His idea was a simple directory where trainers could come in and *register and others could search the directory for a trainer. He felt that the place to locate this Category would be under the parent Category of "Training the Trainer"*

- *He sent a request suggesting that such a Category be created.*
- *In his request he made a case for why such a Category is needed and how he could add value.*
- *Renu accepted the request and created the "Trainer Directory" Category making him the editor of the Category.*
- *She reviewed and accepted this request in her capacity as the editor of a parent Category.*

11 Categories

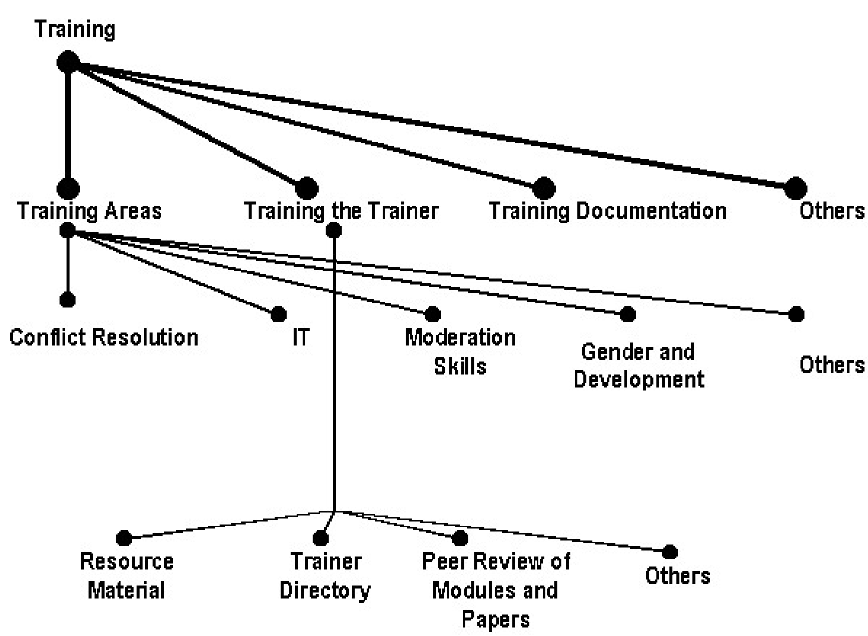
Categories allow for the organisation of information. Categories allow users to publish information in **My Space** where it can be readily found within a particular context.

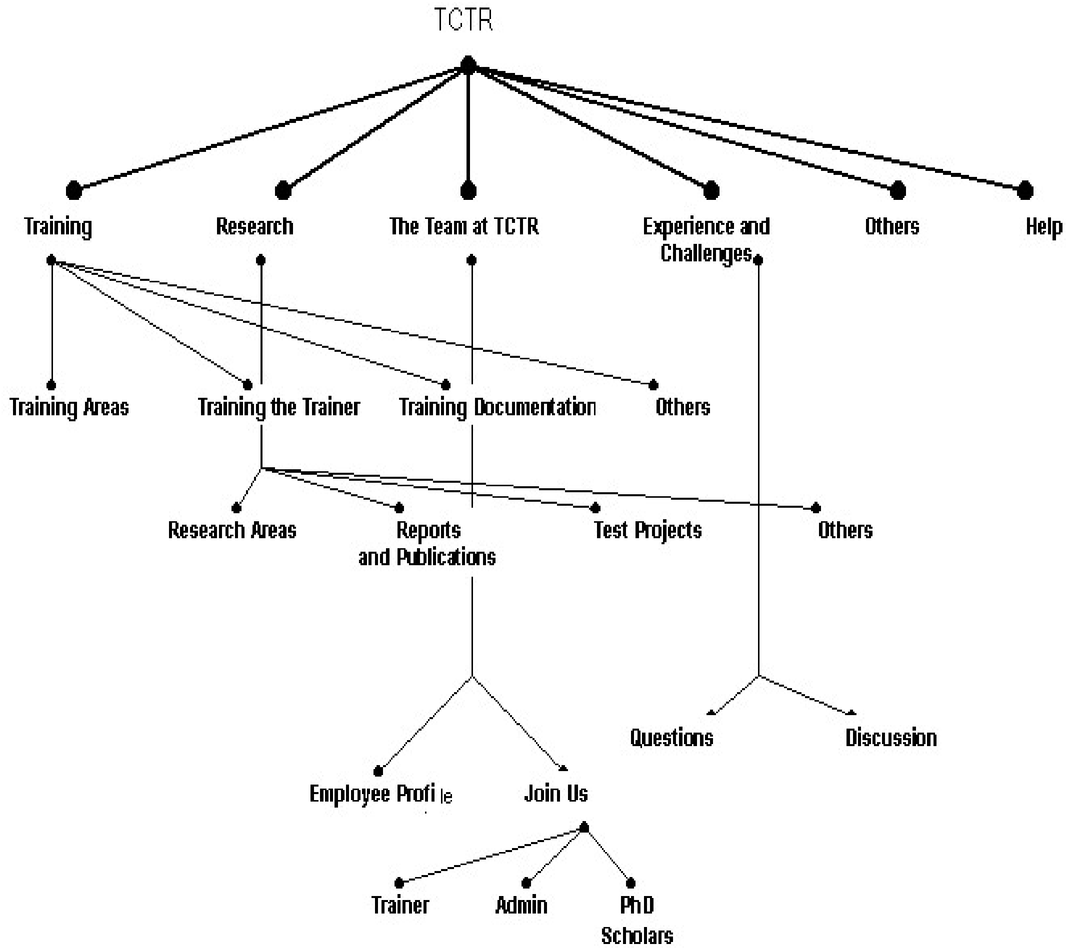
As the name suggests a Category contains information about a particular theme, subject, topic etc. All information in a Category is in the form of Pagelets. Categories take on a hierarchical structure, in the sense that every Category is related to a parent Category and can have several sub-categories.

As mentioned earlier, a Category is created in one of two ways:

1. An editor sees the need for a new Category and creates a Sub Categories.
2. A user feels the need for a new Category and suggests the creation of a new Category (through a request) to the editor.

Just like Renu created a Category for the "Training the Trainer", other members within TCTR created
Sub Categories under different parents. The tree under "Training" now reflects the range of activities that TCTR is involved in. For example Renu now manages several categories under her one parent community of "Training the Trainer".





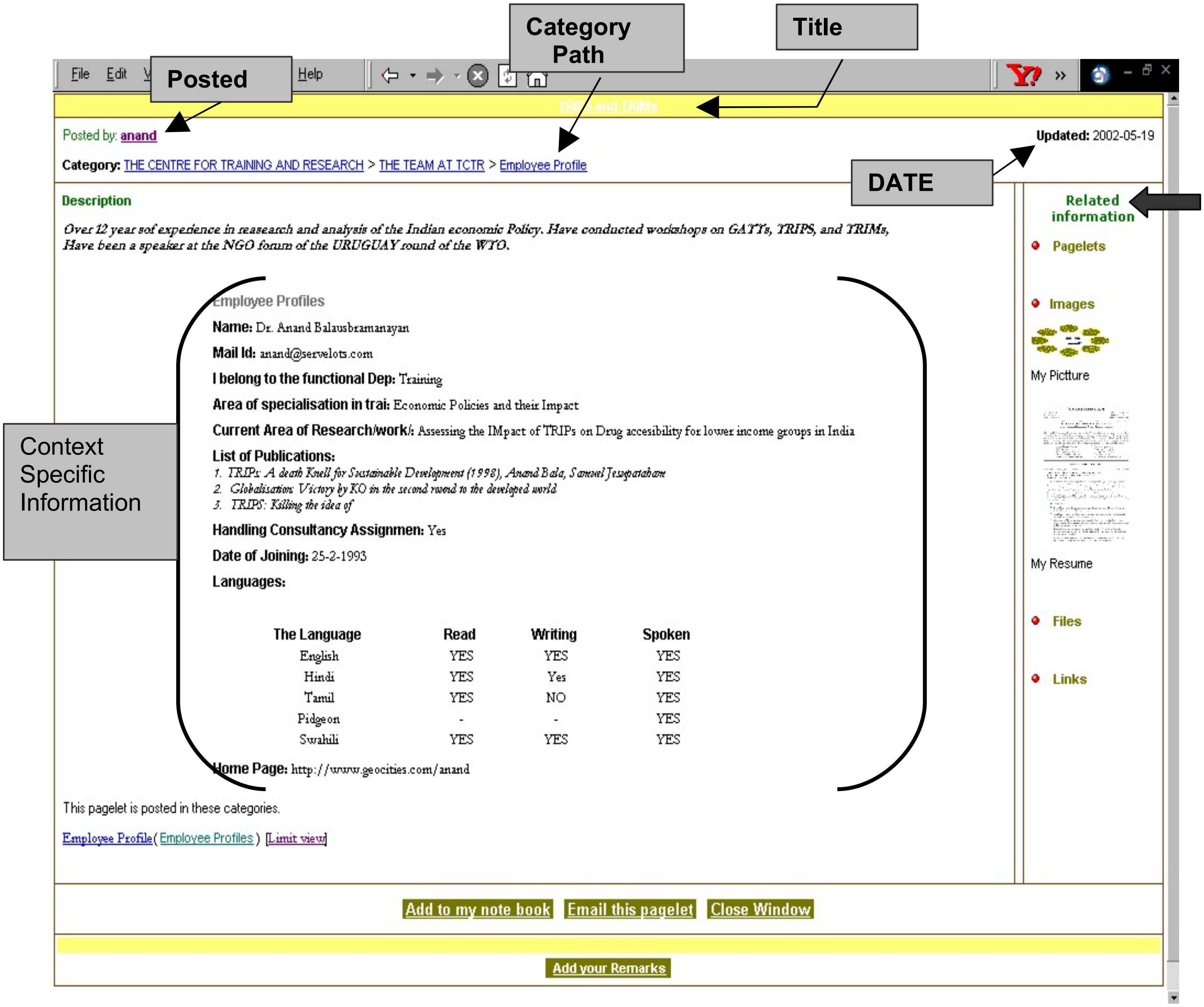
The foundation of the TCTR online community has been completed. Each Category has been created with a well-defined purpose and the editorship has been assigned. The basic Category structure of TCTR is defined as follows.

The top-level editors, (Anand, Deepthi, Shyam and Suzan) need to intervene only when absolutely required. The responsibility of handling the Sub-Categories have been delegated to other editors.

12 What is a Pagelet?

A Pagelet is like a 'leaflet' on the web with a well-defined structure. The structure of the Pagelet is designed and defined by the editor of a Category. Fields covered in all Pagelet include:

- **Title of the Pagelet**
- **Owner** – *Name of the person who has written and posted this Pagelet?*
- **Updated** – *A Pagelet can be modified by its creator. If the Pagelet has never been modified this field will reflect the date on which it was created. Or else this field will reflect the date of when was it last modified?*
- **Related files** – *Any attachments related to the content of the Pagelet.*
- **Category information to where the Pagelet belongs** – The *categories this Pagelet is listed in.*
- **Mandatory and Optional Fields –** *Mandatory fields are indicated by "*"***.** *The mandatory fields must be entered by the user if the Pagelet is to be published. Optional fields need not be filled up for the Pagelet to be published.*
- **Related links and Alias Name-** *Any related links to this Pagelet; the link can be displayed with an Alias.*
- **Context Specific Information:** *These are fields defined in the template. One can use the standard template or use their customized templates.*
- **Secure ID** – *A field to enter a key so that viewing this Pagelet will require that key. The Pagelet will not be searchable and will be secured.*


Category Path
Title
Posted
File Edit Help
TRIPs and TRIMs
Posted by: anand
Updated: 2002-05-19
Category: THE CENTRE FOR TRAINING AND RESEARCH > THE TEAM AT TCTR > Employee Profile
DATE
Description
Related information
Over 12 year sof experience in reasearch and analysis of the Indian economic Policy. Have conducted workshops on GATTs, TRIPS, and TRIMs, Have been a speaker at the NGO forum of the URUGUAY round of the WTO.
Pagelets
Images
My Pictture
My Resume
Files
Links
Context Specific Information
Employee Profiles
Name: Dr. Anand Balausbramanayan
Mail Id: anand@servelots.com
I belong to the functional Dep: Training
Area of specialisation in trai: Economic Policies and their Impact
Current Area of Research/work/: Assessing the IMpact of TRIPs on Drug accesibility for lower income groups in India
List of Publications:
1. TRIPs: A death Knell for Sustainable Development (1998), Anand Bala, Samuel Jesupatham
2. Globalisation: Victory by KO in the second round to the developed world
3. TRIPS: Killing the idea of
Handling Consultancy Assignmen: Yes
Date of Joining: 25-2-1993
Languages:
The Language Read Writing Spoken
English YES YES YES
Hindi YES Yes YES
Tamil YES NO YES
Pidgeon - - YES
Swahili YES YES YES
Home Page: http://www.geocities.com/anand
This pagelet is posted in these categories.
Employee Profile(Employee Profiles) [Limit view]
Add to my note book
Email this pagelet
Close Window
Add your Remarks

12.1 How to create and post a Pagelet

A Pagelet is created by filling out a form.

Venkat wants to make his profile as a trainer available in the "Trainer Directory" Category.

1. *He clicks on the* ***Create Pagelet*** *link, which appears in the* ***Browse*** *tab.*
2. *He selects the "Trainer Directory" Category and clicks* ***Selection Complete****.*
3. *Once selection of categories is complete the relevant form is available. In the case of "Training Directory" the form that has been completed has several fields that need entering.*
4. *Venkat fills in the complete form and attaches relevant files.*
5. *He then proceeds to review the Pagelet.*
6. *There is an option here not to publish the Pagelet or to hold for publication at a later date.*
7. *All Pagelets whether published or not can be viewed in* ***My Space > My Pagelets****.*
8. *Pagelets can be:*
   - *Deleted*
   - *Unpublished*
   - *Modified*

   All the above can be performed only by the creator of a Pagelet. **Note:** However if a User who is not the owner/creator of the Pagelet, has the **Super author** title, could publish or modify the Pagelet.

12.2 The Power of Templates

One of the critical roles of the Editor is to define the Pagelet structures. These structure definitions are called Pagelet Templates.

Templates define the kind of information that is desired in a Pagelet. The template defines the form that the user will fill-out when creating a Pagelet.

A well-designed and thought-out template will help collecting quality information.

A template provides flexibility; you can have text boxes, tables, date fields, address and e-mail fields, drop downs etc.

What is a template?

- A template is a structure or pattern or that is used to build a particular Pagelet.

Remember!

- A template and can be modified and created only by an editor of the category where the template is being created.
- You can copy (we call it inherit) fields from one template to another when creating a template.
- Templates are defined in terms of fields. Each field is defined with a name and field type.

Templates assure informative contributions that address the information needs of a community. Pantoto also uses the template definitions to make available advanced searches.

Category location: TCTR > Training > Training the Trainer > Trainer Directory
The "Trainer Directory" Category contains information on trainers. The "Trainer Profile" Template defines fields such as Current Organisation, Area of Specialisation, Modules Offered, Target Audience, Location, Qualifications of the Trainer and their Address.

Category location: TCTR > Training > Training the Trainer > Peer Review for Modules and Papers
The Peer Review Category is dedicated for reviewing articles and training modules. Accordingly, two templates for each such Pagelet type are defined namely "Training Module Review" Template & "Research Paper Review" Template. These templates contain specific fields related to Training Modules (length, target audience, etc) and research papers (Abstract, Bibliography etc)

Trainer Directory Template	**Training Model Review Template**	**Research Papers Review Template**
Fields	*Fields*	*Fields*
Name	Title of the module	Title of the paper
Age	About the module	Abstract of the Paper
Current Organisation	Your comments about the module	Bibliography
Who are you employed with?	Subject of the module	Subject of the paper
Area of Specialisation	Desired qualifications of the reviewer	The objective of the Paper
Modules Offered	Broad outline of coverage of the Module	Any relevant papers that you have published
Target Audience	Target audience of the module	Suggested Profile of the reviewer
Location	Training methodology and tools used	Deadline for submitting the review
Your Qualifications	Number of resource persons required	
Your Contact Address		

12.3 Creating a template

To illustrate how one can create a template, let us follow what Chandru the HR Executive did.
*As an editor of the Category "Employee Profiles" he has the rights to create templates. In the **Editor Task** tab, he clicks on **Edit Categories.** Chandru*

*follows the Category path TCTR >The team at TCTR >Employee Profiles. Under "Employee Profiles" Category he clicks on the link **Create new template**. This presents him to a form where he specifies template fields. He wants to define the following fields:*

1) **Full Name**
2) **Mail Id**
   Selects an e-mail field for this purpose
3) **Functional Area**
   Gives a drop-down selection box of the various departments in the organisation
4) **Area of specialisation in Training**
   Provides a drop-down selection box of over 30 areas of training
5) **Current Area of Research/Training**
   A text area that allows them to tell us more
6) **List of Publications**
   Provides a small text area for employees to talk about the papers that have published
7) **Handling Consultancy Assignment**
8) A quick Yes or No that will allow casual visitors to know whether or not they can be approached for consultancy assignments.

Every template will have a title; in this case he calls it "Employee Profile". The template title is critical, because as the community grows, one can search for templates using their titles and copy the structure to other categories.

Every time he creates a field he has to decide the:

1. **Template Title**
   The name of the template, which will be used for search.
2. **Template Description**
   A brief description that states the purpose of this template.
3. **Delete Flag**
   This can be checked to delete this field when this field is not needed.
4. **Field Order**
   The sequence in which the fields in this template will appear.
5. **Visible**
   A field can be made visible on the form for other users to review by checking on the V in V/M/S check boxes
6. **Mandatory**
   Some fields can be made compulsory to enter data. As the name suggests, by specifying that fields are mandatory, it makes it compulsory to enter data for the field in order to publish or save the Pagelet in My Space. *An e-mail field for example could be made mandatory when creating a contacts directory.* Checking the M in **V/M/S** checkboxes will make the field mandatory.
7. **Searchable**

By checking the **S** in **V/M/S** checkboxes for a particular field, the editor will allow a user to search for content in this particular field. **Searchable** fields allow for targeted and specific searches. *For example in the Employee Profile template, a user can search for an employee who knows, Telugu, is located in Hyderabad and specialises in Gender and Development. All the relevant fields have been made searchable and appear in the search panel.*

8. **Field Name**
   The name of the field, as it should appear in the form. In this case it could be Name, Mail ID, etc
9. **Field Description**
   A brief description/instructions to user that tells him about the information to be entered.
10. **Field Type**
    The type of field it should be*. For e.g. it could be Text, number, text area, table, combo, date, time, e-mail, URL*
11. **Field Size**
    Define the field size. *For example if it is table how may columns will you have, if it is combo box how many choices will you have, etc.*

*He can add more fields by using **More fields** drop down list. And delete the fields by checking on **Delete Flag** and clicking on **Delete rows.***

*Once Chandru has gone through the screens that helps him create and has reviewed his template, he clicks on the **Update** button to complete his template definition. Hereafter to make the template available for use in publishing Pagelets, he clicks on **Set active templates**.*
*Under **Select Templates** Chandru selects "Employee Profile" template and **Add>>,** gives the **order** in which he wants this template to be displayed and **Accept** it.*

Employee Profile Template			
Sl. No	**Field**	**Field Type**	**Comments**
1	Full Name	**Text**	*Name of the Employee*
2	Mail ID	**E-mail**	*E-mail Id of the employee*
3	Functional Area	**Combo**	*Department in which currently working*
4	Area of Specialisation in Training	**Combo**	*Domain of expertise of the of the person in the area of training*
5	Current Area of Research and Training	**Text**	*Which areas of training are you currently involved in*

6	List of Publications	**Text Area**	*Talk about any papers that the employee has published or just list them.*
7	Handling Consultancy Assignments	**Combo**	*Yes or No?*
8	Date of Joining	**Date**	*When did you join the team at TCTR?*
9	Fluency in Languages	**Table**	*List languages and your level of fluency (excellent, good, fair)*

12.4 Cross Linking Template

When you use the **Set active templates** option, you can also use the entire template from one Category to another. One can however:

a. Cannot modify the linked template. Only the creator of the template can modify the template.
b. Any changes in the original template will be reflected wherever the template is linked.

Nrithya, a team-mate of Chandru's, saw this particular feature and used it to copy complete templates

- *Her objective was to take the recruitment for TCTR online.*
- *She requested for a Category for recruitment called **Join Us**.*
  *Category □ TCTR > The Team at TCTR > **Join Us***
- *Under this Category, she created sub-categories for different functional areas where there are vacancies.*
  Sub-Category □ TCTR > The Team at TCTR > Join Us > Trainer
  TCTR > The Team at TCTR > Join Us > Admin
  TCTR > The Team at TCTR > Join Us > PhD Scholars

- *Her tree structure helps her to manage recruitment to different departments.*
- *She then created one detailed template "XXXXX" that would capture information that she needed to select candidates for short listing under the **Trainer** Category*
- *She wants to link this template for **Admin** and **PhD scholars** as well.*
- *So on her **Editor Task**, she selects the Category path TCTR > The Team at TCTR > Join Us > Admin, she clicks on **Set active templates**.*
- *Under **Select Templates** Nrithya selects "XXXXX" template and **Add>>,** gives the **order** as 1 and **Accept** it.*
- *She repeats the steps for using the template "XXXXX" in TCTR > The Team at TCTR > Join Us > PhD Scholars.*
- *Now any changes that she makes to the template "XXXXX" in the **Trainer** Category will be reflected under **Admin** and **PhD Scholars** as well.*

Note: *We have attached a detailed step-by-step guide to creating templates at the end of this document.*

12.5 Template fields Inheritance

Pantoto allows a user to inherit from existing templates in the same Category during template creation or editions. Template field inheritance provides for convenience for the editors and consistency across the community.

- *Chandru used this feature to complete the creation of his template.*
- *He knew that the "Trainer Directory" template" had fields that he could copy. For example areas of specialisation has over 30 choices in a combo box. Reuse of such fields and templates ensures consistency for the TCTR users.*
- *To do this, Chandru clicks on his Editor Task > Edit Categories and navigates to TCTR >The team at TCTR >Employee Profiles and selects the "Employee Profile" template under Template Here: He selects Edit template and then Use Fields from other templates option. Here is can select the fields from the templates available in this Category as he desires.*
- *He picks up just one field "Area of Specialisation in Training".*
- *He Add>> them and Accept it.*
- *Template field inheritance can also be one when creating a new template.*

13 Browse and Search

Browse tab is used to display all the categories under the current domain when viewed in **Category View** and display all the Pagelets when viewed in **Pagelet View**. From the **Category View**, one can navigate to the sub categories and finally to the desired Pagelet.

Data search can be performed from the **Browse** tab. There are two basic types of searches provided in Pantoto:

a. **Text based search using *Search* option**
A simple search mechanism that allows you to search for particular words.

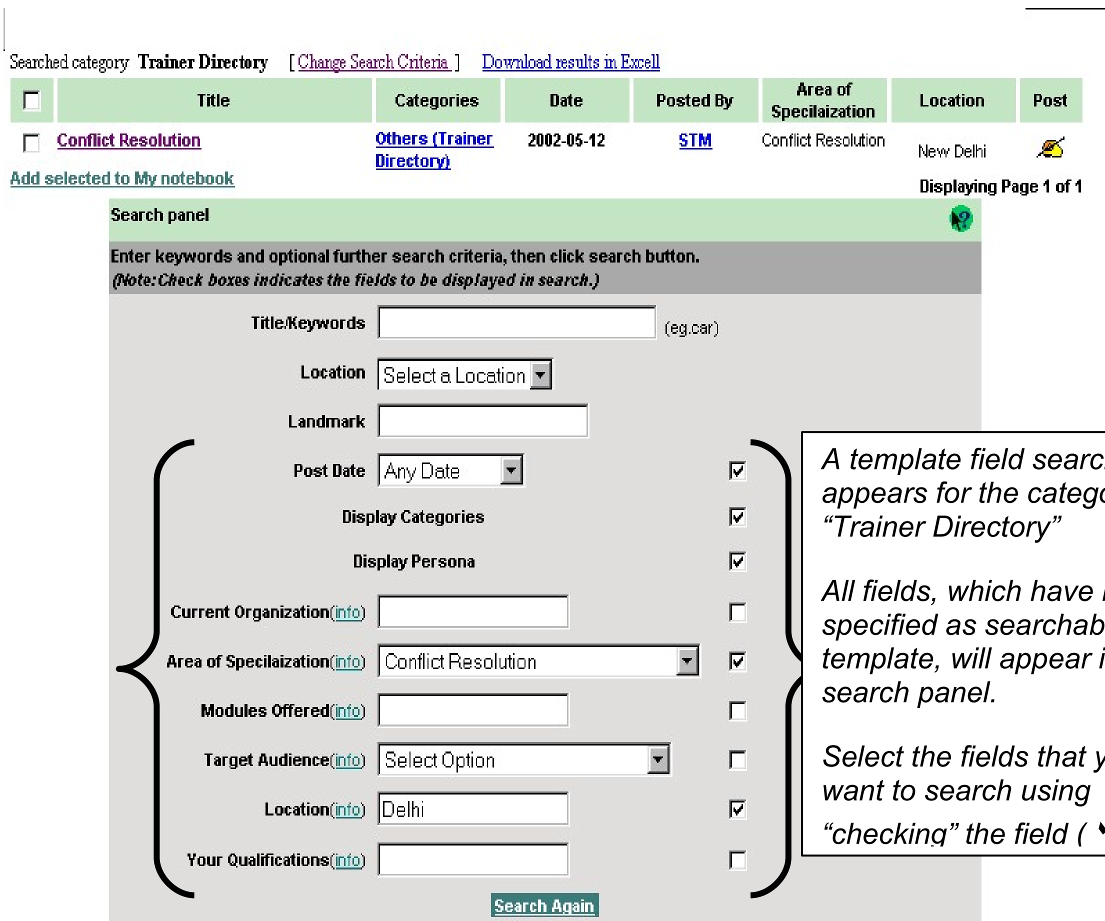
b. **Attribute based search using the *Search Panel* for:**

- Title and Keywords
- Location
- Landmark
- Date (Find Pagelets created on a particular date)
- Personas
- Template Fields (Fields defined by the Category Editor as "searchable")

13.1 Search for a Template Field

A team member Suhana has received a request form a friend in Delhi to find a trainer in Delhi who conducts workshops on conflict resolution. Here is what she does:

- *She first searches for a Category on trainers by searching for "trainers". **Trainer Directory** is her best result. (This is a Text Based Search)*
- *In the **Trainer Directory** Category, the search panel displays all the fields that are searchable in this Category.*
- *She enters "Delhi" in location and "Conflict Resolution" in Area of Specialisation fields.*
- *She gets one Pagelet in the result.*
- *As the database grows, using the template field search will become an easy way to filter and locate a trainer based on attributes.*



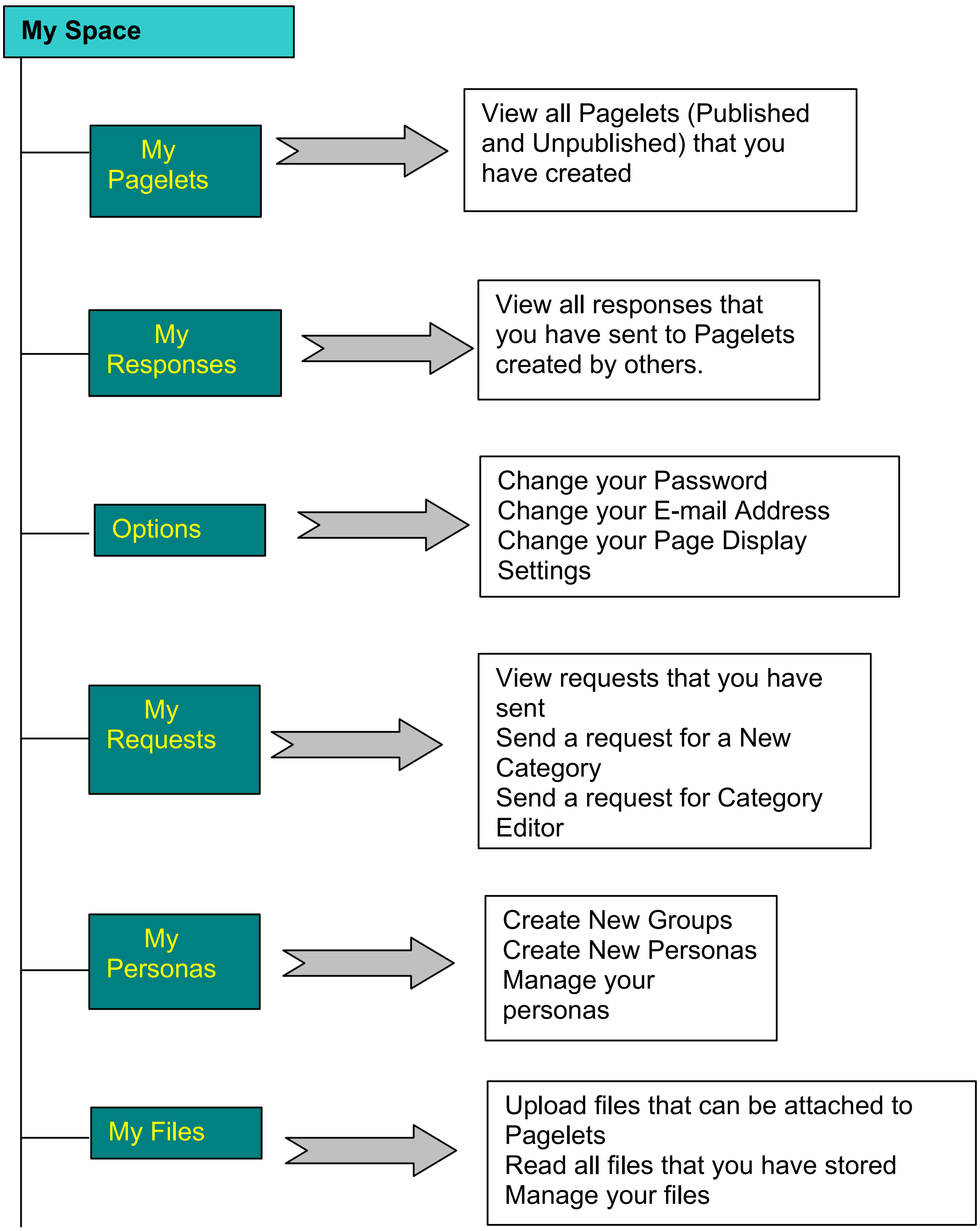
A template field search as it appears for the category "Trainer Directory"

All fields, which have been specified as searchable in a template, will appear in a search panel.

Select the fields that you want to search using "checking" the field (✔).

14 My Space

Every user of Pantoto has an area of his or her own. This area is referred to as **My Space**. **My Space** cannot be accessed by any other user within the system. **My Space** allows a user to manage the way s/he participates in the community. The different features that can be accessed under **My Space** are as follows:



15 My Notebook

My Notebook allows you to bookmark Categories, Locations, Personas and Pagelets. Under Pagelet bookmarks you can create sub-folders for your convenience. Once book marked a Pagelet, Location, Category or Persona can be directly accessed by the user without having to search.

Note: when creating a group, the member personas of the group have to be book marked.

Click on **My Notebook** on the **Browse** tab to access your bookmarks.
To Bookmark a

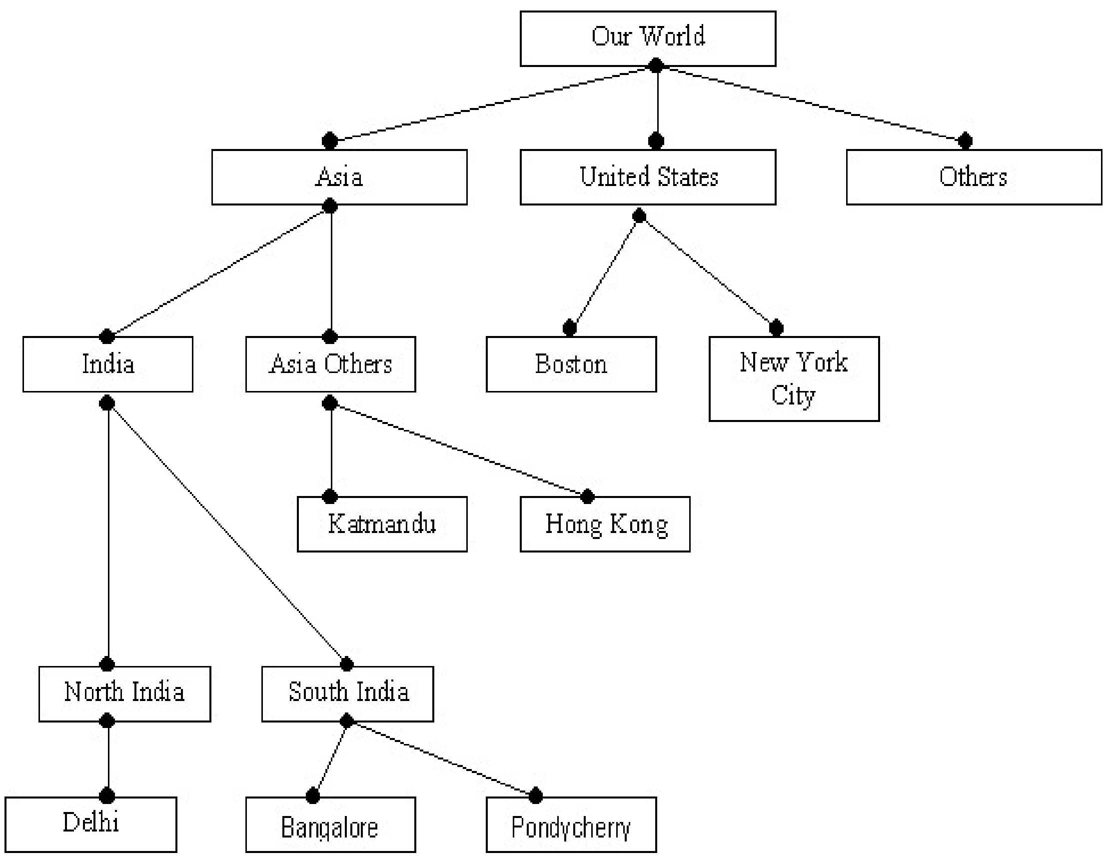
Category > click on **Add to My Notebook** in the **Browse** tab.
Pagelet > open the Pagelet and click on **Add to My Note Book**
Location > open the Pagelet with a **Location**, click on the **Location** and then click on **Add to My Notebook**
Persona > on every Pagelet you have the persona against the field **Posted By**. Click on the Persona, the pop up window will have **Add to**

16 What is a location?

a. Location data is a set of location identifiers that have a hierarchical structure. For e.g. a country can have many states, a state can have many districts and so on and so forth.
b. **Location** describes physical/geographic location.
c. **Location** is community specific.
d. All **Location**s need to be created by location editor(s). In **Editor Task** tab, click on **Edit Location** to see all the existing locations. Use **Create Sub Location** to create new locations under the current location.
e. A **Location** is an optional field in every Pagelet.
f. A user can set a location in his Pagelet using the **Location** field.

16.1 An illustration of Location

Say you have offices or points of interest. Lets call them Bangalore, Pondycherry, New York, Boston, Hong Kong, Kathmandu and Delhi
Then, based on some criteria, you need to make a hierarchy of these:



- *Now a Pagelet might have info in it saying it is from Bangalore*

- *But someone can ask for all India Pagelets.*
- *Since Bangalore is in South India that is India, this Pagelet will be found in the search.*
- *South India can grow its many different locations, and some officer, might be the one who is in-charge of adding or re-organising the South India locations -- thus, the need for location editors.*

Locations are community specific. A community can define the hierarchy of its location tree in anyway that it wants. In the above example, supposing United States expands to include more branches these can be incorporated under the location tree by the location editor.

17 Domains

The term ***Domains*** refer to an area that allows restricted access of information to a User. This means that the **STM** may deem it necessary to restrict information access to a particular *User* either for the purpose of information security or because it is redundant to the *User*. Under such circumstances the ***STM*** creates a domain, to confine a *User* to view information within that domain. The ***STM*** has the rights to create and **edit *Domains*. For e.g.**

For the purpose of User access, the *STM* may create two broad Category of domains which may be termed as,

1. **Non-corporate Domain** - This domain would also have the look and feel of a website. The only difference is that it would have additional information which a guest may not be required to access. For Eg. A *Category* with information pertaining to Administration can be confined to access within the organization and its members.

2. **Note:** The default domain that appears during the Pantoto installation can be deemed as the “**Non Corporate**” domain.

3. **Corporate Domain** - This domain would give the look and feel of a typical website any guests or Users could navigate to obtain valuable information about a company.

18 Overall Maintenance of a Pantoto Community (STM)

Deepthi, Shyam, and Anand have now set up the TCTR community. Different people within the organisation and outside have taken on the role of editor for different Sub Categories. The three, as agreed at the beginning of the project, now decide to take on the role of overall maintainers of the whole TCTR community.

Within Pantoto such a role is referred to as the **S**uper **T**ree **M**aster (STM). As a group the STM invites them to become the STM for the entire TCTR community. During installation, the Group persona **STM** is created and assigned to a chosen persona. This persona is responsible for inviting other online community builders to join the STM persona. STM has the ultimate authority in handling the online community. At the start of the community building process the STM is very active

The STM user ID created during installation of the software and is the editor of the initial categories that are created.

in building the foundations of the online community. However, as time passes and the foundation settles, the STM role

becomes more passive as the handling of the community is distributed among other community members. Building the foundation of an online community involves creating an initial set of Categories, inviting people to participate in the community and delegate ownership of Categories to responsible participants, carefully craft templates and administer user rights.

Initially they (Anand, Deepthi and Shyam) have a larger role to play, as they have to keep monitor the overall activities of the TCTR community, and have to thoughtfully create templates for the users needs, handle requests for creating new categories, etc. As the community grows they delegate some of their responsibilities as “editors” to other members within the community. These new editors now can maintain and develop sub-categories, while STM will have the rights to over-ride their decisions, or to help them with their decisions.

STM is the ultimate community editor. The STM has the authority to override other editor action when needed.

The STM is an administrator, and thus can

- Create access levels in the system
- Decide on user rights to access levels Do some system consistency check
- Batch upload and download of (backup) information

To perform these functions all STM has to do is log in and click on the **Editor Task** Tab

The **Editor Task** tab at the STM level covers:

- View Requests
- Edit Categories
- Edit Location
- User
- Administration

19 Annex

19.1 About templates

1. Only the editor of a Category has the right to create and modify templates.
2. Select the **Editor Task** tab.
3. Select the Category where you want the templates to be created.
4. Click on the link **Create new template**. This will open up a form.
5. This form defines the template fields.
6. A valid template title needs to be entered. This title appears as the Template Heading in the Pagelet.
7. We can create multiple templates in a particular Category.
8. The form that allows you to design the template has the following features:
    a. The fields can be made to delete by checking the **Delete flag** checkbox and then clicking on **Delete rows**.
    b. The order in which the fields appear can be decided by giving the **Order**.
    c. The fields can be made visible, so that the users when reading the Pagelet can view the data in this field. This can be achieved by checking the **V** in **V/M/S** checkboxes.
    d. The particular field can be mandatory, i.e. the user must enter the data before the Pagelet can be saved or published. This can be achieved by checking the **M** in **V/M/S** checkboxes.
    e. The template fields can be made searchable by checking the **S** in **V/M/S** checkboxes.
    f. A valid Field Name is given in the **Field Name** option. Special Characters like /, *# Are allowed in the **Field Name**.
    g. Enter the description in **Field Description** as to what the particular field signifies.
    h. The field type of the data that is entered can be selected. Some of the field types are Text, Number, Text Area, table, combo etc.
    i. **Field Size** specifies the number of characters that the user can enter.

j. The fields can be aligned either horizontally or vertically.
k. One can also add fields from other templates by selecting the **Use fields from other templates**. This helps in not replicating ones work.

9. More fields can be added by giving number of extra fields that are required in the **More fields** option.
10. Click on the **Accept** after the field design has been made.

19.1.1 Cross linking templates

1. To select templates from other Categories to this Category.
2. Can be performed only by an editor of a Category.
3. This option is available in **Editor Task**. The templates created in a particular Category can be linked with the other Categories, i.e. the templates can be shared among Categories.
4. Click on the **Set active templates** link in the Category, for which one has the editor rights**.**
5. The next screen will show all the Categories templates available. Select the templates and **Add>>** then **Accept** to select one or many templates.
6. An Active template cannot be modified and any changes made in the Category where it resides will reflect in the Category also, where the template is set active.

19.1.2 Inheriting Template fields

1. If needed, fields can be inherited to the current template. A user can choose fields that are available in a template within that Category.
2. While creating or updating a template, there is the **Use Fields from other templates** option. This option allows users to browse and search for other template fields.
3. At this stage you can choose specific fields that you want to inherit from other templates.
4. Fields can be ordered in any order based on the discretion of the editor.

5. Click on the **Accept** option to create the template.

19.1.3 Creating Tables

1. When defining the template a user can choose to incorporate a table by specifying "table" in **Field Type** and the number of table columns by giving the **Field Size.**
2. The user is taken to a different screen to create the template.
3. In this screen the user has to fill up the following criteria for the table properties

   Initial Number of Entries for number of table rows.
   Field Order - The sequence in which the columns will appear.
   V/M/S - For making the field **Mandatory** or **Searchable** or **Visible**.
   Field Name - The Title of the Column.
   Field Description - A brief description/instructions to user that tells him about the information to be entered.
   Field Type - Text, number, text area, date, time, e-mail, URL.
   Field Size - Define the size, of the cells in the columns

19.1.4 Combo

1. Combo allows the user to select from multiple options.
2. After the accept option is selected, a form is opened, and the multiple options are entered in this form.

19.1.5 Modifying the templates

An editor of a Category can add new fields or modify an existing template.

1. Go to **Editor Task** tab, select the Category for which you are the editor and click on the template that needs to be modified under **Templates Here**.
2. Select the option **Edit template** when the template opens.
3. Any changes can be done to the template and new fields can be added.
4. The template can be deleted by using the **Delete template** option.

19.1.6 Standard template

1. Standard template comes by default with a Pagelet.
2. Whenever Pagelets are created the default templates are also inherited along with the Active templates. User can select which template should be inherited by unchecking the templates under **Choice of templates**.

Note:

1. If a template has been set active in other Category or if the fields of the templates were inherited, then the parent template from which the fields were inherited cannot be deleted.
2. If any Pagelets are using the templates that we created, then the template fields cannot be modified.
3. Appropriate data should be entered in the template fields and the data entered should match the field type specified.

19.2 How To Create And Post Pagelets

1. In the **Browse** tab, click on the option **Create a Pagelet**.
2. Select the Category/Sub-Categories where you want to post the Pagelet.
3. The user can also post the Pagelets under multiple categories by using the option **Add to Selection**.
4. **Add to Selection** allows a user to select multiple categories to post a Pagelet.
5. After the selection of categories, click on **Selection complete** option.
6. In the next screen, one can still add more categories using the option **Select More**.
7. The creation of Pagelet can be cancelled by using the option **Cancel** option anytime.
8. Template selection takes places by choosing the one under **Choice of Templates**.
9. The Pagelet creation process can be continued using the option **Get the form**.
10. This opens a form where the user can begin to fill-in data.

11. Appropriate Pagelet title is entered at the Pagelet title option.
12. Select the appropriate Persona as whom you want to post the Pagelets.
13. Enter Search words that are relevant to the Pagelet that is being created, which can be used as a keyword in case of quick search.
14. Provide description about the Pagelets that you are going to create. The description can be provided in three views-
    - Plain
    - HTML
    - WIKI
15. Select the **Location** where you want the Pagelets to be posted. Again multiple selections are allowed.
16. Any specific landmark close to the location can be mentioned in the **Landmark** option.
17. In case any of the categories selected have templates associated with them, then the user needs to enter the relevant information into the templates.
18. If there are any links that can give more information to the Pagelet that is being created. There is an option to make these available on the Pagelet.
19. Apart from the links the user can also attach his own files and images under **Related Files**.
20. To upload related files, click on the **Add File** option and select the files that you wish to include in the Pagelet.
21. In case you wish to provide protection to your Pagelet, you can do that by using the option **Secure Id**, which prevents other users from viewing the Pagelet unless and until the id is given.
22. Click on **Submit** option to create and publish the Pagelet, **Save Draft** to save the Pagelet to post it later or **Cancel** to abort the Pagelet creation.
23. In case the Pagelet requires any modification using the option **Modify Pagelet** can carry it out.
24. The Pagelet can be mailed to a friend or any other concerned authorities using the option **E-mail this Pagelet**.

25. The Pagelet can be deleted if we wish to abort the idea of Pagelet creation by using **Delete**.
26. All Pagelets, Published and unpublished that have been created by the user are available under **My Space > My Pagelets.**

19.3 How to create a Corporate domain

To create a Corporate *Domain* a *STM* has to ensure the following steps:

1. Go to the option **Editor Task.** Click on the **Administration** option.

2. Click on "**Create a domain**" option

3. Enter the *Domain ID*, say "**tctrcorp".** This is the ID that will be used to identify the domain.

4. Enter the name for the *Domain, say "**The Centre for Training and research**"*

5. Select the User or domain owner whom you want to be the editor for that *Domain*. For e.g. The domain owner here is "**admintctr**". Only the *Editor* for that *Domain* will have the rights to edit this ***Domain*** and *STM* has rights to edit all the *Domains*.

6. Select the *Category* for which you want the domains to be created. For **eg.** Here the domain has been sliced from the following category, to appear as corporate domain which is "**The Centre for Training and Research**" onwards.

7. Select the ***Location*** **f**or which you want to create the ***Domain*.** Here, the default location was selected which is **"Globe".**

19.4 How to create a Post Similar link

1. Create a dummy Pagelet with the selected Templates which are required for the form. Either post the Pagelet or click on the option "Save draft".

2. Go to the "Modify Pagelet" option. Here, you get a **shortcut** link. Click on this link and from the new window that opens, copy the **URL** you desire.

3. Paste the Post similar link to a desired area. **For example**, The desired area could be in Category description or in Pagelet description.

19.5 How to customise a Post similar link

Note: The "Event" category has been chosen as an example to describe the creation of a post similar link

1. Click on the "Modify Pagelet" option of the Pagelet that you have posted in the "Events" category. Once the Pagelet opens, you get a shortcut link.

2. Click on the "shortcut" option.

3. Clicking on this option would open a new window.

4. Go to the option that reads "If you would like to customise the form......." and click on the link that reads "**click here**".

5. Clicking this link would open the Post similar properties window which allows the **User** to customise his Post similar link as per his discretion. In other words, through customisation, the User is able to change the appearance of the Pantoto default Pagelet as per the selected options.

6. The options in the Post similar link properties window are the following:

   a. Pagelet Id: This is the pagelet Id for which we are setting the post similar link properties.

   b. Title for the form: The title provided here would replace the 'Pagelet posting' phrase that appears as the title of the form. For eg. In the "**Events**" post similar pagelet would have the title as "**Events details**".

   c. Skin for the form: This uses the following options

   (i) *Default:* It shows the default form with the Template(s) which are selected for the Post similar link.

   (ii) *Use Templates only:* It displays only the Template(s) which are selected for the Post similar link without the standard Template which contains the default fields like Search words, Select Category etc. **Note**: The "**Events**" category that we have chosen uses the this option as the skin for the form

   (iii) *Use Templates and Location:* It displays only the Template(s) which are selected for the Post similar link and the Location field of the standard Template.

   d. Access level: Earlier to post a Pagelet User needs to perform the following steps:

   (i) Sign in
   (ii) Click on "Create a Pagelet"
   (iii) Select the Categories

(iv) Select the Templates
(v) Then post the form

The above mentioned process is a bit tedious for some clients. So the "Post a Pagelet" process have been redesigned wherein a single click link would be built, which allows the User to post the Pagelet.

Note: A single click link which is similar to the PostSimilar link but the only difference is the presence of "presetAccessLevel" in the link. Once the user clicks on the link he will get the form displayed if all the Template Access levels are within the presetAccessLevel. This form will contain Userid and password fields with the templates. The User will enter all the details and submit the form. If the User has the Access level greater than presetAccessLevel then he will be allowed to post the form by signing himself in. On submitting the pagelet, it checks whether accesslevel of the user which is entered, is greater than or equal to preset access level. If it is, it creates a pagelet and in addition the user will be logged in. If access level is less than preset access level, a message is displayed saying the same.

e. Mandatory field: At this field if the User chooses the Location option, then, it becomes mandatory for him to select Location from the DDL provided during form submission.

f. On Submit action: The first option is the default option which takes you to My Space or Browse screen. The second option is that, after submitting the form, the User can be taken to any URL that he so specifies in the URL option field. Typically this feature can be used to show the User the result of a search or custom Category, after the data is submitted. The third option would be that a specific acknowledgement screen could be chosen to display the content after the User submits the form.

g. Pagelet title: It is the title that is provided for the Pagelet after the form is submitted. For **eg.** The pagelet title we have provided for “**Events**” category is “**Enter the event title here**”

7. Setting the properties and clicking on the **Submit** button would take the User to a window that displays a list of URLs. Now, to make this form available through a single click, choose the desired location by copying the URL and pasting them in the description field of the desired Category where you would want the form to appear.

8. Now the User can go to this Category and click on the link that he has provided. Doing so opens up the customised form.

19.6 Discussion Forum

A discussion forum is a virtual arena where people get together to brainstorm on a particular topic of interest. Usually the topic under discussion is managed by a moderator who initiates the topic for discussion. Any individual who shows interest on being part of a community or participate in an online discussion may do so by subscribing to that discussion forum or that community.

19.6.1 How to create a Discussion Forum

a) Three Categories has been defined.

b) The first Category would be the discussion forum category which is called "**Experiences and Challenges in Human Resource Management**".

c) The second Category can resemble a repository where people can post their subscriptions to become members of the discussion forum category. This is called the "**Pending subscription**" category where all posted subscriptions reside.

d) The third category would serve as a repository wherein members could post their request for topic initiation on a particular discussion which would be later approved by the moderator of the discussion group. This is called the "**Pending approval**" category.

e) The discussion forum has been controlled by a moderator whose User id is "**vinod**". Vinod would approve and instantiate both membership as well as topic initiation on a particular discussion.

f) The other participants in the forum are the Users / members / subscribers whose User ids are "**sudha**" "**aksingh**" and "**chandru**". They actively participate in the discussion by requesting for topic initiation once their membership has been approved.

g) The aspect of the discussion forum is creating a Moderator group. The name of this group is "**moderator**" which is created from the "**My personas**" option in "**My space**" tab. The introduction of this group is to further enhance the exclusivity of a discussion forum. It means that unless an individual is a part of this moderator group, it would not be possible for him to moderate discussions taking place in a particular discussion group.

e) The final aspect of the forum is the User group. The name of this group is "**User**" which is created from the "**My personas**" option in "**My space**" tab. When a User shows a desire to be part of a discussion group, the moderator basically subscribes him into the User group. Unless the User is part of this User group, he is not allowed to participate in the discussion forum.

Discussion forum participants are as follows:

Moderator - user id = vinod
Users - user id = Sudha
- user id = chandru
- user id = aksingh

Note:
An important aspect to be kept in mind is that for a Category to act as a discussion forum, the User has to go to the file situated at /webapp/tctr/WEB-INF/classes/domains/_discussionforum.properties and set the category id in this property.

The contents of the discussion forum properties file are displayed below

##dforum.keywords specifies the categories which should behave as discussion forum categories
##the behaviour is concerned with two things 1. look and feel
2. moderator and subscriber concepts.

##dforum.1.cat specifies the category id of the discussion forum category
##dforum.1.moderatorgroup specifies the id of the moderator group of that category
##dforum.1.usergroup specifies the id of the subscriber group of that category
##dforum.1.pendingapprovalcategory specifies the category where user requests(pagelets) for discussion initiation fall into.
##dforum.1.pendingsubscriptionscategory specifies the category where user requests(pagelets) for subscriptions fall into

##some categories just need the look and feel property without these moderator and subscriber group concepts , then for those categories dont mention moderatorgroup and usergroup properties or even if u mention dont give and values for those properties

dforum.keywords = 1:GENEX1312
dforum.1.cat = GENEX1312
dforum.1.moderatorgroup = 36
dforum.1.usergroup = 38
dforum.1.pendingapprovalcategory =GENPE7117
dforum.1.pendingsubscriptionscategory = GENPE1871
dforum.1.plink = 96

The following displays a sample of how a typical discussion forum would appear

Discussion on Human resource management Post your response

Posted by: chandru
Updated: 2005-10-11 14:26:39
Category: TCTR Home > Discussion Forum > Experiences and Challenges in Human resource Management

DF request topic

Briefly describe your topic I would like to initiate a topic on human resources management and the various challenges facing the management of human resources from the organisation perspective

Remarks: **Total Remarks: 2**

Subject	Posted by	Date		Responses in the thread
RE:Discussion on Human resource management	aksingh	2005-10-11 14:30:57	Reply	0 responses

-------------[Replying to]---------------
>I would like to initiate a topic on h...

I am interested in this topic too	sudha	2005-10-11 14:58:29	Reply	0 responses

Every organisation these days seem to have given greater prominence to this vital issue of dealing w...

19.7 Photo Album

A photo album category is created exclusively for displaying Pagelets that contain only images. The Photo album concept has been incorporated into Pantoto to provide a more appealing look and feel for the images being uploaded into a Pagelet.

Without defining a category to be a photo album category, any images uploaded to a Pagelet posted in such a category would appear just one below the other in the "**Attached files**" area of the Pagelet.

19.7.1 How do we create a Photo album

a) Upload images to "**My files**" in the "**My Space**" tab. The image filed uploaded here for eg. Is "**team.zip**" which is an album of all the **TCTR** team members
b) Create a category and define that as a "**Photo album**" category.
c) Now create a Pagelet and through the "**Add files**" option in the Pagelet creation go to "**My files**" and select a desired set of images from the uploaded files that you want to attach to the Pagelet as a photo album.
d) Submit the Pagelet
e) Go to the category where the pagelet has been posted and open the "**new window**" icon beside the Pagelet title.
f) Clicking on this icon would open up as a photo album.

The pagelet that was created as a Photo album would appear as below

Photo album of the team members of TCTR

19.8 <u>Events</u>

Any program or workshop that is conducted for a specific period of time could be termed as an Event. Pantoto offers this feature to describe a set of events taking place on a particular day or set of days in the form of a calender.

Events in the form of a calendar helps the user to easily identify a list of events taking place on a particular day or for s specific period of time just by browsing through the various days of the calendar where such an event has been posted.

19.8.1 <u>How do I create an event</u>

a) Create a Category and name it as an **Events** category
b) Create a template with a mandatory “**date**” field and other required Event fields details and set it active in the **Events** category.
Note: The date field is made mandatory because it is the field using which, the events are searched.
c) Create a post similar pagelet in the Events category and post an event using the post similar link.
Note: Refer to the notes above to create a post similar link.
d) When the user clicks on the **Events** category link, he gets to see the default calendar view with the events posted during the current month.

e) When the user clicks on a particular event, on the dates on which it appears, the entire event details scheduled for that date will be displayed.

> **Note:**
> An important aspect to be kept in mind is that for a Category to act as an Event category, the User has to go to the property files situated at /webapp/tctr/WEB-INF/classes/domains/_specialkeywords.properties and _wavecalendar.properties and set the category id and template field id in these property files.

The following is an example of how an event calendar would look like.

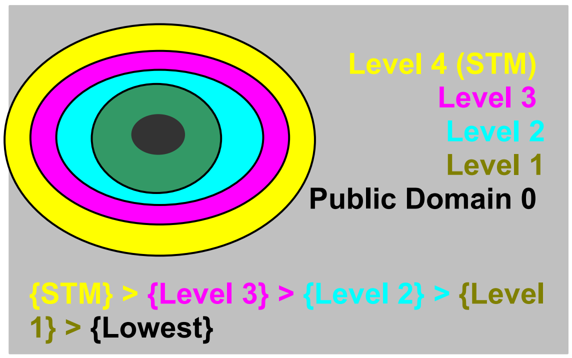
October 2005 Go

October 2005

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
30	31					1
2	3	4	5	6	7	8
9	10	11	12	13	14	15 • Workshop on Human resource Management
16	17	18	19	20	21	22
23 • Business Etiquette and Communication Skills	24	25	26 • The Principles of Conflict Resolution	27	28	29

20 Glossary

20.1 Access Levels



1. Access Levels have a Hierarchical Structure.
2. The STM (**S**uper **T**ree **M**aster) user has the highest access level and can access all the Categories.
3. The STM can determine and define the access levels. For e.g. Top management would have the highest access levels, General managers a level lower, managers next and finally executives.
4. The lowest level is referred to as the public domain in the online community. This level can be accessed by all the guests of the online community.
5. The editor of a Category can define who can **read** Pagelets within the Category and who can post Pagelets (**write**) for all access levels below his.
6. The STM has to assign every user with an access level.

To define access levels for any user the STM can go into his/her **Editor Task** tab and click on **Users**. STM can reorganize access levels as the community grows. A STM can give access to a user by going to the **Editor Task** tab under **User >User Details.**

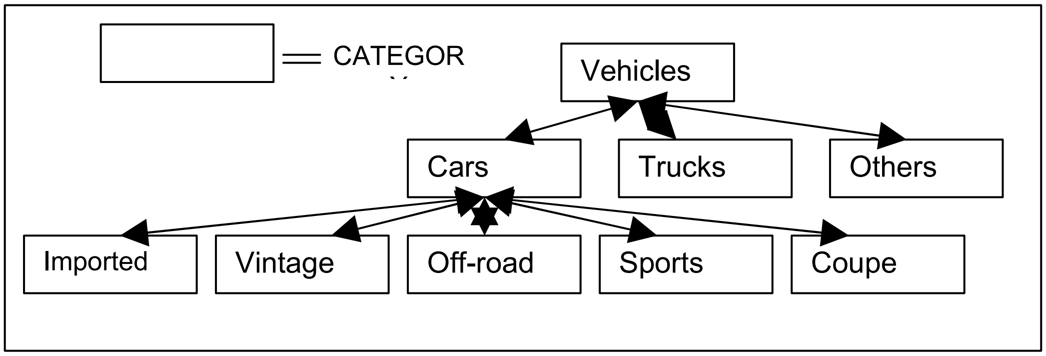
An Editor can define read and write access to any Category by going to the **Editor Task** tab under **Edit Category**.

20.2 Category

Categories allow for the organization of information.
Categories allow users to publish information in a **space** where it can be readily found within a particular context.

As the name suggests a Category contains, information about a particular theme, subject, topic etc. All information in a Category is in the form of Pagelets. Categories taken on a hierarchical structure, in the sense that every Category is related to a parent Category and can have several Sub Categories.

A Category on cars for example would be under a parent Category on Vehicles. The Category cars could also have several; Sub Categories like imported, vintage, off-road, sports cars and coupé.



To create a Category, click on **My Space> My Requests> New Category** and fill in the form to send a request to create a Category.
Please note that you must clearly mention the parent Category (under **Select Category**) and the reason why you are requesting for the new Category.

20.3 Community

When we use the word community, we use it in the context of an **online community**. In a community:

- Individuals/groups find representation (can create a space and identity for themselves).
- People can communicate with each other.
- A repository of community knowledge is being built and is accessible to member of the community.

The words community, online community and Pantoto community are used inter-changeably by us and carry the same meaning.

20.4 Editor

An editor is responsible for the over all maintenance of a Category and its Sub Categories. An editor can either be a group or an individual.

An editor can create and maintain Sub-Categories; accept requests and create Sub-Categories; and create and modify templates for the Category and Sub-Categories of which s/he is an editor.

To become an editor the user has to send a request (**My Space> My Requests> Category Editor).**
The user has to suggest why s/he wants to take on editorship of the Category. The STM editor can either accept or reject such a request.

20.5 Location

a. **Location** data is a set of location identifiers that have a hierarchical structure.
b. **Location** describes physical/geographic location.
c. **Locations** are community specific.
d. All **Locations** need to be created by location editor(s).
e. A **Location** is an optional field in every Pagelet.
f. A user can set a **Location** in his Pagelet using the **Location** field.

- To suggest a new a **Location** you can send a request through **My Space > My Requests> New Location.**
- To request for the editorship of a **Location**, you can send a request through **My Space > My Request > Location Editor**. But first you need to select the Location for which you are demanding the editor rights. So under **Select Location** select a location, state the reasons for asking for the rights and **Submit** for STM to review the request.
- The location editor will use his discretion when creating a new location or delegating location editor rights.

20.6 My Notebook

My Notebook allows you to bookmark Categories, Locations, Personas and Pagelets. Under Pagelet bookmarks you can create sub-folders for your convenience. Once book marked a Pagelet, Location, Category or Persona can be directly accessed by the user without having to search.

Note: when creating a group, the member personas of the group have to be book marked.

Click on **My Notebook** link.
To Bookmark a

Category > click on **Add to My Notebook** in the **Browse** tab.
Pagelet > open the Pagelet and click on **Add to My Note Book.**
Location > open the Pagelet, click on the **Location** and then click on **Add to My Notebook.**
Persona > on every Pagelet you have the Persona against the field **Posted By**. Click on the Persona and you can add it to **My Notebook**.

20.7 Pagelet

A Pagelet is an information unit that has a communication wrapper. When published a Pagelet is like a 'leaflet' on the web with a well-defined structure. The structure of the Pagelet is designed and defined by the editor of a Category. All the information in Categories is available in the form of Pagelets.

Pagelets allow communities to collect context specific information and e-nables information centric communication

To create a Pagelet click on **Create a Pagelet** in the **Browse** tab and follow the instructions.

20.8 Personas

- A Persona is a name with a profile.
- Personas are the online representations for individuals or groups.
- Personas create and post Pagelets and communicate with other Personas.
- We can think of the Persona as an online identity.

To create and manage your Personas/Group Personas go to **My Space** and click on **My Personas**.

20.9 Super Tree Master (STM)

STM is the ultimate community editor. The STM has the authority to override other editor action when needed. The STM user ID is created during installation of the software and is the editor of the initial Categories that are created.

20.10Template

When creating a Pagelet a user fills out a form. Each Category has it own forms that are referred to as a template.

A template is a structure or pattern or that is used to build a particular Pagelet. A template and can be modified and created by an editor of the Category. The final structure of the template with its fields is known as the template definition. The template definition plays an important role in collecting information that can be used by the community.

You can inherit fields from one template to another when creating a template. Templates are defined in terms of fields. Each field is defined with a name and field type.

If you are an editor, you can modify, inherit and create templates in **Editor Task.**

20.11 Template Cross Linking

The templates created in a one Category can be linked with the other Categories, i.e. the templates can be shared among the Categories. A shared template cannot be modified at the Category where it is shared. Any changes made in the Category where it resides will reflect in the Category, where the template is shared.

On the **Editor Task > Edit Categories**, click on **Set active templates**. The next screen will show all the Categories templates available. Select the templates and **Add >>** then **Accept** to select one or many templates.

20.12 Template Fields Inheritance

When creating a new template or when modifying an existing template, the editor can browse and attach fields from other existing templates within the same Category. This feature in the Pantoto community is known as template field inheritance.

When creating or modifying a template in the **Editor Task > Edit Categories**, click on **Edit template** and then **Use Fields from other templates** option to select fields defined in the other templates.

20.13 Domains

The term ***Domains*** refer to an area that allows restricted access of information to a User. This means that the **STM** may deem it necessary to restrict information access to a particular *User* either for the purpose of information security or because it is redundant to the *User*. Under such circumstances the ***STM*** creates a domain, to confine a *User* to view information within that domain. The ***STM*** has the rights to create and **edit *Domains*. For e.g.**

For the purpose of User access, the *STM* may create two broad Category of domains which may be termed as,

1. **Non-corporate Domain** - This domain would also have the look and feel of a website. The only difference is that it would have additional information which a guest may not be required to access. For Eg. A *Category* with information pertaining to Administration can be confined to access within the organization and its members.

Note: The default domain that appears during the Pantoto installation can be deemed as the "**Non Corporate**" domain.

2. **Corporate Domain** - This domain would give the look and feel of a typical website any guests or Users could navigate to obtain valuable information about a company.

20.14 Post similar link properties (PAL properties)

Post similar link properties help in custom tuning the look and feel of the page that presents the form to a User to better represent the domain of the data being collected using the form.