InfoAktiv

Bring Information to Life

InfoAktiv Content Manager

User Guide

For Content Manager Version 3.2 - August 2010

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Terms Used

Collateral:
The files and information within the Content Folder that the Owner will display. This can include pdf documents, PowerPoint presentations, video files, Flash files and audio files.
Content Folder:
The owner's collateral organized into a hierarchy for presentation to the User. The Content Folder also contains configuration information and records of the Users' activity. On a technical level the Content Folder is a Windows folder with a number of sub-folders containing standard Windows file types.
Owner:
The person who will set up a Content Folder of information to display with InfoAktiv.
User:
The customer, prospect or member of the public using the InfoAktiv system.

Preface

The purpose of this document is to enable Owners to use Content Manager to set up the required folders and files for the InfoAktiv display application, to understand the file structures, and set up a quiz.

Supported Software Versions

- Windows XP SP3,
- Microsoft Office 2007,
- Internet Explorer 7,
- Windows Media Player 11,
- Adobe Reader 9,
- Adobe Flash Player 10

InfoAktiv Content Manager

InfoAktiv Curves

InfoAktiv Boxes

InfoAktiv Gallery

Overview

There are three main elements to consider when setting up an InfoAktiv system:

- The Display program that presents the owner's marketing collateral to the User.
- The Content Folder that contains the Owner's collateral.
- Ideally, the Owner's Content Folder should be a subfolder of the 'C: \InfoAktiv\' directory or folder.

The purpose of this guide is threefold:

1. To explain how the owner can build the Content Folder of collaterals.
2. To explain how to tailor the display's appearance and information presentation.
3. To explain how to take advantage of InfoAktiv's value-added features:
   a) The ability to capture user data, and
   b) The capability to set up and run quizzes and competitions.

This guide will take you through setting up a Content Folder, adding collateral, and show how to tailor and enhance their appearance within the chosen display program. It will also take you through setting up a competition or quiz.

During the setup, various files are created; within the 'Documents & Folder Modifier Details' section, tables will give you a description of what these files do, although when using Content Manager you do not need to know the details, as files are automatically created and completed for you. For the more inquisitive and adventurous, there is a detailed description of some of these files in that section.

The InfoAktiv display application supports the following file types:

- Adobe pdf
- Microsoft PowerPoint
- Macromedia Flash swf
- Windows Media Player supported movie and audio files
- Application execs and shortcut files.

Working on Content Folders

Bear in mind that Content Manager works on your display folders and files in 'real time'. When you modify something the change happens immediately and there is often no going back. For this reason it is strongly advised that you create separate copies of your normal files and folders for displaying on InfoAktiv and back-up the InfoAktiv folders you create regularly. That way you have fall-back points in case you inadvertently delete something you didn't want to.

Creating a Content Folder

In order to best show how to use Content Manager I will build a simple Content Folder containing information to present with the InfoAktiv display program:

- As mentioned in Appendix 3 - 'Points to Note', it is advised that content resides on the C drive within a first level folder named 'InfoAktiv' I will set up a new content folder for my presentation within this folder named 'Sample Content' – 'C:\InfoAktiv\Sample Content'
- I already have some marketing material, relating to the company 'InfoAktiv', in two folders, which I will import into my presentation folder 'Sample Content'
- I will change both folder and document titles and enhance the presentation by using my own icons rather than the system defaults.
- To complete the demo I will set up a quiz employing many of the quiz options including video, pdf and photo clues.

I will also draw your attention to the 'Help' buttons – as I do not describe in full detail all the functions of the CM application, it really is worth spending a short time to review these screens.

Sample Content Folder Available for Downloading

If you would like an example of a content Folder to practice with, you can download one from www.infoaktiv.com\resources.aspx. Just copy it into your C:\InfoAktiv folder.

Starting Content Manager

You start InfoAktiv Content Manager by double-clicking the Content Manager application Icon. You will be presented with the following screen.

On the top left of the screen (shown above) you will see 'File' 'Help' and 'About' – click on 'About', then click the drop-down and a window similar to this will appear, confirming which version of Content Manager you are using. This manual is written for Version 3.2. (From now on, referred to as 'CM').

Close the 'About' window, then click on 'Help' and then the drop-down and the following text will appear in a window (the text is reproduced here as it is an important first step in using CM):

*"**InfoAktiv Content Manager** provides a user-friendly interface to create and modify the content folders to be presented by the **InfoAktiv display** program**.** It provides a graphical interface for creating and modifying all the necessary files in the content folder. It is designed to save a significant amount of time, particularly when customizing the appearance of folders and setting up details collection questions and quizzes. Content Manager also provides the means to create email templates and control access to the internet.*

*To start, click **New Content Folder** under **File** menu. This will create a new content folder with the name you specify and a '~config' folder within the content folder to hold all necessary files such as – the default screensaver, the help files, the question files, etc.*

*You can work with an existing folder using **Open Content Folder.***

*The **File** menu will list the ten most recent content folders you have worked with.*

*Using **Copy Content Folder To**, you can copy the content folder you have created to another location, such as a USB stick or network drive, ready for transfer to an **InfoAktiv** System.**"***

Creating a Content Folder

Click 'File' on the top left of the CM application screen and click 'New Content Folder'. A familiar directory-style window appears. Select the directory that you need to create your new content folder in (preferably C:\InfoAktiv), click 'make a new folder' and CM creates and highlights a folder called 'New Folder', rename it to something more suitable.

This action also creates a '~config' folder within your new content folder, if you select your content folder within the Windows 'My Computer' browser then you should see the following.

This automatically creates a number of required files within the ~config folder. Note that the Audit files are created by the display program when run, not by CM.

The following table explains the function of these files:

File	Description / Example / Format
qbase.txt	All available 'simple' data capture questions. E.g. open questions such as 'Name'. A default set of questions, based on those in Microsoft Office Outlook Contacts is supplied by InfoAktiv, and the owner can replace or supplement these with whatever other questions he chooses.
Qbasemc.txt	All available multi-choice data capture questions. The owner can build multiple choice questions with single or multiple answers allowed. E.g. 'Are you interested in 1) Buying 2) Renting or 3) selling – Tick all that apply'.
Qactions.txt	Defines what data capture questions are asked when certain actions are performed by a user (email action, print action, contact me action etc.). This allows the owner to define what information he will ask a user for before supplying him with collaterals.
Default Email Template.emt	The template is used with normal documents viewed on the InfoAktiv system. Typically you will attach the relevant document when a user requests a copy by email. The owner can edit the content of this email template by right-clicking the selected file in the listbox. You can also double-click the filename to edit it.
Default Email Template-Web links.emt	The template is used when the User requests information that is actually on a website being viewed from the InfoAktiv system. It will send a URL rather than attaching a document. You can edit the content of this email template by right-clicking the selected file in the listbox. You can also double-click the filename to edit it.
Web links.rst	Contains the permission settings that control access to the Internet from web links that are contained in documents in the Content Folder.
attractor.ppt	Default attractor.
File	**The files below are supplied by InfoAktiv**
helpDC.rtf	Help text shown for Data Collection screen
helpForm1.rtf	Help text shown for Initial configuration screen
helpDetail.rtf	Help text shown for Detail screen
helpList.rtf	Help text shown for Listing screen
helpKW.rtf	Help text shown for Keyword Screen

Help Files – (Owner modification is optional)
Most screens have a Help button. Pressing this brings up text and an optional picture. The text itself comprises two parts: InfoAktiv's text on system operation and optional user defined help.

The system operation help is held in the ~config folder. The User defined help is held in text files called userhelp.rtf. These files are placed within the Content Folder structure and as such apply to all user documents within the sub-folder. The User can also specify a picture to be displayed alongside the help text. This is held in a file called userhelp.jpg (see table above)

In CM you will see two tabs displayed, ‘Folder-Wide Settings’ and ‘Manage Sub-Folders and Contents’ as shown.

Folder-Wide Settings

The screen revealed by the ‘Folder-Wide Settings’ tab is shown in the picture below:

While this page is used to define the global settings for the complete Content folder, 'Banner Pictures', 'Details Collection Questions' and 'Email Templates' can also be varied at the folder or individual document levels.

Attractor Screens

These are used like a screensaver to attract Users to the touch screen. Infoaktiv displays the active attractor screen when it has been idle for a length of time that you specify on the display system. You have a number of options:

1. If you do nothing, InfoAktiv will display the 'InfoAktiv Flash Attractor'.
2. You can select your own PowerPoint presentation, 'Flash' (.swf) or 'Screensaver'(.scr) file.
    - To select your own presentation, click the browse button, and select the required files, i.e. PowerPoint and associated video or sound files, CM will copy these files into the ~config folder for you.
3. You can load InfoAktiv's Standard PowerPoint Attractor and edit it by double-clicking on it.
4. You can load the 'Standard Flash Attractor' into your Content Folder and modify the words and logo in it. The Standard Flash Attractor is based on the InfoAktiv Flash Attractor.
    - This is described in more detail below.

NOTE: when you use the 'Add a Standard Attractor' functions they will overwrite any Standard Attractors in the ~config folder, removing any changes you made.

Selecting the 'Modify Standard Flash Attractor' option will cause a drop down window to appear as shown below. The 'help' text which follows explains how to use this feature.

"The Standard Flash Attractor" consists of:

- *A **Background** (blue by default but other colored backgrounds can be downloaded from InfoAktiv.com).*
- *A looping video that demonstrates how to use the InfoAktiv display.*
- *A **Logo***
    - *Click on Browse to replace it with another JPEG. The JPEG needs to be a similar size to the default one (about 380 pixels by 155 pixels).*
- ***Header Text** - at the top*
    - *Edit this by double-clicking.*
- ***Content Text** – A series of bullets by default*
    - *Edit this by double-clicking.*
- ***Footer Text** that scrolls across the bottom*
    - *Edit this by double-clicking.*

*The **Browse** button next to **Select Background Scheme** can be used to find alternative Standard Flash Attractor backgrounds if they are stored on the local PC.*
If you select a different coloured background file, it will be saved as 'Standard Flash Attractor'.
*The background on this screen does not change to reflect what color attractor you are using; you will need to finish your modifications and **Preview Standard Flash Attractor** to see that.*

*You can use the **Download Flash Attractors with different color-schemes** link to visit www.infoaktiv.com/resources and download different background color schemes from the InfoAktiv website.*

How it works:
The Backgrounds are Flash applications that pick up the video, text and JPEG from separate .txt files and a JPG located in the ~config folder. When you edit the text etc. you are editing the external files.
The alternative-colored backgrounds that you can download are actually different Flash applications that are different colors but pick up the same video, text and JPEG files."

Key points to bear in mind are that regardless of the background you select, CM will save your file into the ~config folder as 'Standard flash Atttractor.swf'.

Default Banner Picture
You can select an image to be the default banner for all folders – each folder will have the option to select a specific banner for that particular folder. If one isn't selected the default banner will appear. ***The banner picture should be in bitmap (bmp) format*** and is stretched to 1280x95 pixels, so to avoid distortion you should try and ensure that your banner is as close as possible to the required size. Again, to select your banner, use the banner browse button to select the appropriate file.

Background Image
There are three versions of the display program, InfoAktiv Gallery, InfoAktiv Boxes and InfoAktiv

Curves.
InfoAktiv will take care of where the content and controls are displayed on the screen. If you are using Curves, it will be laid out in an elliptical pattern, if you are using boxes, it will be laid out in a more regular grid. Gallery gives maximum design flexibility with a plain background and larger graphical icons for the items.
Whatever background you select will be used by the InfoAktiv display application.
The background needs to align with where the content is placed, therefore backgrounds designed for Curves will not work well with Boxes or Gallery and vice-versa.

You have a number of choices regarding backgrounds:

1. Do nothing, and InfoAktiv Curves, Boxes or Gallery will use its respective default background shown in the screen shot.
2. Use another InfoAktiv background. A selection can be found in the InfoAktiv Resources folder or downloaded from www.infoaktiv.com/resources. InfoAktiv and their partners also offer services to create customized backgrounds.
3. Create your own background (easier with Gallery or Boxes than Curves). Backgrounds are ordinary JPEG images that can be created or modified with a utility such as Microsoft Paint.
    - If you have created your own background, or have a customized one, it may be selected using the browse button and will be copied into the ~config folder and named 'Background.jpg'.

The 'Restore Default' button will reinstate the default background, and the replaced 'Background.jpg' will be renamed as 'Background*nn*.jpg'

Customize the 'Request a Copy' panel
When Users browse documents, there is normally a panel that gives them to option to take a copy by Email, post or USB stick. You can change the appearance of the panel that the action buttons are placed on.
This image is the custom request copy panel background for all documents. If one isn't selected, the default panel will appear. ***The panel image should be in a jpg or png format***. It is automatically stretched to 200x300 pixels; hence to avoid distortion, you should try and ensure that your panel is as close as possible to the required size. Again, to select your panel, use the browse button to select the appropriate file. Note that this feature is only available in the Gallery version of InfoAktiv.

Boxes – An example of a Boxes background follows. The boxes style is designed to be the easiest for laymen to customize and still have a professional-looking display. The areas available for customization are as indicated. In the display application the banner will be displayed at the top and the content fingers (collateral names) overlaid in the main centre section. In the case of Boxes, control buttons are placed in the grey band at the top of the screen.

Gallery. The gallery style provides a more graphical display and gives the owner maximum flexibility to customize the background and fonts. Also gallery allows setting customised icons such as animated or transparent background icon. The banner will be displayed at the top of the screen and the buttons for individual pieces of content (collateral names) are positioned in the main centre section.

Setting Details Collection Questions

It is useful to understand this section before looking at the Email Template tab.

The best place to start is with the 'Help' text, some of which is reproduced below:

"This screen can be used to set up the questions that users will be asked when they ask for copies of information on the InfoAktiv system. Different sets of questions can be asked depending upon the media that the user has requested the information to be provided upon. For example, If a user asks for information to be posted, you will probably want to make questions about the postal address compulsory, whereas if he or she asks for an email, you might not even ask for postal address, but, will want email address to be compulsory. Questions can be further tailored down to a document or item level."

While usage is mostly intuitive and amply explained by the 'Help' text, it is worth reiterating the use of 'drag/drop' for adding and removing questions from the User list, and the use of 'page break' (indicated by a black bar in the above picture of the question grid). Breaks are mandatory after the eighth open question and between open and multi-choice questions. Again, this is explained in the 'Help' text.

Also of note is the 'Key' which designates if a question is 'not asked', is 'optional' or is 'compulsory' (an asterisked question on the actual InfoAktiv display). To select, place your cursor on the appropriate cell and left-click to cycle through the options.

NOTE if you are using InfoAktiv to send emails automatically: InfoAktiv will assume that the email is to be sent 'To' whatever the User's answer is to the first of the 'questions To Ask' where the question contains the text 'email'.

You can also create your own questions, which can be either Open or Multi-choice, e.g. for a Contact Request you could ask how the User prefers to be contacted. At this point it is important to draw attention to the two Audit files that are produced when the display application is started. (see 'End of Day' in the InfoAktiv User Guide), there are two areas of caution associated with the Audit data:

1. The answer cell a user ticked for a multi-choice question will contain 'YES', whereas those not ticked will contain a 'NO' – beware of a double negative, i.e. if you set a 'yes/no' question and the User ticks 'no', the column for the 'no' answer will indicate the User selected this answer with the word 'yes'.
2. When the Audit Header file is created there is a column to reflect each possible question, if you add extra questions or change them, you must copy and delete the original Audit Header.txt and Audit.txt files so that new ones can be formed that reflect the new questions and question order.

When you have completed the question design, exit by clicking the 'Done' button.

Setting up Questions when using the 'Email Request Log' Audit File

In addition to the standard audit file, InfoAktiv produces a second file that consolidates multiple email requests by the same user into a single row on a spreadsheet. This can be used for as input email automation systems when you want to send Users one email each, with multiple hyperlinks or attachments, conditional upon the specific documents they requested.

It helps to understand the underlying process:
When creating the standard audit file InfoAktiv provides one column for each of the 'Available Questions'. The columns are in the same order as the questions appear in the 'Available Questions' list.

When InfoAktiv creates the Email Request Log it starts with the normal audit file and then:

1. Scans it to find the first question (column header) containing the word 'email'.
2. It then uses this column to de-duplicate the email IDs in it and consolidate each email ID's requests for documents.
3. InfoAktiv adds an extra column to the file for every unique document requested and puts a '1' in those columns against the email Ids that requested that document.

For this to work properly, it is essential that the 'email' question you want to use for the consolidation is the first question in your 'Available Questions' list to contain the text 'email'.
Don't be caught out by adding a new 'Please enter your email' type question without realizing that something like 'Bus email' might already appear higher in the list. Sometimes it is safer to edit the existing question's text than to add a new one.

Scanning Visitor Badges and Barcodes

Many events and venues issue visitors with barcoded identification badges. Generally their process is as follows:

1. The visitor provides his or her contact details and answers profiling questions when registering for the event.
2. The event organizer or their registration company collects the visitor contact details in a database.
3. At the event each visitor is given a badge with a unique number barcoded on it.
4. Exhibitors hire barcode scanners to record the codes of people they talk to.
5. After the show the registration company provides exhibitors with the contact data of the people they scanned.

Many registration companies will allow exhibitors to use their own scanners (they will, quite reasonably, still charge for their data and lead retrieval services though). In this situation the exhibitor will give the registration company a file of bar code numbers after the show and the registration company supplies the corresponding contact data.

With the optional barcode scanner, InfoAktiv supports scanning visitor badges. This provides a very fast and convenient way to collect contact details at events where the registration company agrees to cooperate. By combining barcode scanning with your own customized questions on InfoAktiv you can collect exactly what information you want to know along with comprehensive contact details.

If using a badge scanner, you should create a question such as 'Please Scan your badge'. If your stand staff also have coded badges, then you may want to consider adding the opportunity for them to scan their badges against their contact using a similar question.

The InfoAktiv barcode scanner kit is optimized for use at events. It mounts on a kiosk or counter top and can either sit in a cradle to scan automatically or work in hand-held mode. If you would like more information about barcode scanners please contact InfoAktiv (info@infoaktiv.com) or your InfoAktiv business partner.

Edit Default Email Template

When the User requests a piece of collateral, or a website link to be emailed, the InfoAktiv system can create and send a Microsoft Outlook email. The owner specifies one of the three options below on the display program's Configuration Screen:

1. The customer detail and request is recorded in the audit file
2. Automatically create emails with attached collateral and place them in Outlook's Drafts folder.
3. Automatically create emails with attached collateral and place them in Outlook's Outbox.

On both options 2 and 3, the request is also logged in the audit file as per option 1.

Creating Email templates in Content Manager

Select the edit 'For normal documents' by double-clicking the template name or using the right hand button of your mouse and selecting 'edit', and the following screen drops down,

Again we will start with the 'Help' text, click on 'Help' –

"This screen is used to set up the e-mail messages that will be sent to users when they ask for information from the InfoAktiv system by e-mail. Two default e-mail templates will be created by the application when a new content folder is created. The first template is the default template to be associated for normal documents (that reside on the system). Second template is the default e-mail template that will be picked up when the user visits the web links from the InfoAktiv system.

You can also create document-specific e-mail templates.

NOTE: InfoAktiv will assume that the email is to be sent 'To' whatever the User's answer is to the first question you ask where the question contains the text 'email'.

*The e-mail subject field is mandatory. Optionally, you can specify the reply-to, Cc and Bcc fields. The screen provides an **html editor** to build your e-mail and apply formatting to the text. You can **include images** using the **upload image** button in the editor. You can add a hyperlink in the text using the **hyperlink** button.*

You can also have up to 3 attachments in the e-mail.

*The right hand side of the screen provides the **available questions** list. The answers to these can be used as placeholders in your e-mail message. You can drag and drop the placeholder-tags (questions) that you wish to include in the e-mail message. (eg. firstname, lastname of the user) These placeholders will be replaced by the responses collected by the InfoAktiv system.*

The placeholder answers that you include here must be specified to be asked at the time of details collection in the InfoAktiv system. The application will indicate if it finds that a placeholder tag question has not been specified at the time of details collection.

*You can add the question to your questions list using the **Build Questions** screen."*

As you may note from the screen shot above, I have not asked for the Title of the User as one of my default questions, hence this is highlighted in red and this question, if required, would need to be added in the email column of the 'Default Details Collection Questions'

The 'Reply to', CC and BCC are straightforward, the 'Reply to' may be the 'sales desk' and CC and BCC may be used to alert the sales desk that an email has been sent to a potential customer. Also, remember that this facility is available at the document level, so you may wish to change the field contents, for instance, to a specific product sales desk or finance group depending on document content.

Clicking the Attachment(s) button reveals a drop-down that allows, not only the current document requested to be attached, but also other information that may be relevant or that you would want the customer to be aware of, such as a promotion.

There is also an *'Attach current document'* tick box – this should normally be ticked because that is what the visitor have requested to obtain, but there may be occasions when the document is too large, or you want to verify some information first, so you don't want it attached – bear in mind that this facility is also available at the document level.

Edit Default 'Web links' Email Template

The web links template is much the same as the document template. The major difference being that you must include the question field <#Web Page Request Link#> within the email and you do not have a current document to attach in the 'Attachments' drop-down window.

Web Links in Documents

Clicking the Define Rules for Web links – 'Edit' button causes the window shown in the next screenshot to drop down:

This is used to control what a user is allowed to access on the Internet. There are two basic types of links (URLs): Those in documents on the InfoAktiv system and those found on websites once the User has hopped from the InfoAktiv system out onto the Internet.

Using this panel you can restrict how far a User can go out on to the internet and what a site is allowed to do. These settings can be made for specific URLs, URLs within a domain (by using a 'wildcard'), URLs found in documents, or URLs (links) on external websites.

Rules are defined for each URL or category of URLs.

To help in understanding which set of rules are applied in which circumstance, you may find the following logic diagram useful:

Web Link Rules

As usual, the 'Help' text is a good place to start:

"This screen can be used to build the permissions for the web-links that appear in the presentation documents. The table lets you associate the various permissions for the urls you type under the URL column. Just type in the url and click on the corresponding cells in the row to either allow or disallow the following actions.

Access	*Access to this web-link.*
Pop-ups	*Opening of pop up windows.*
Downloads	*Downloading data from the webpage.*
No. of hops	*The number of hops that the user will be allowed starting from the url.*
New Windows	*Opening links in new browser windows.*
Mailto Links	*Opening the default mail client on the machine by clicking on mailto links.*

You must specify the URL in the following pattern -
1. www.abc.com/def.html : This will set permissions for the exact url as specified.
2. www.xyz.com/ : This will set permissions for all the web pages that fall under www.xyz.com (for eg. www.xyz.com/services, www.xyz.com/products/prod1.html, etc)*
*3. *xyz.com* : This will set permissions for all web pages containing text xyz.com. (for eg. http://www.industries.xyz.com, http://www.xyz.com/products, etc)*

However, for the links that point to web pages residing on this local machine, you need not specify the permissions. Those web pages will be internal links so they will be always enabled.

You can delete a row from the table by clicking on the row header (the grey portion) and hitting the delete key."

Note that the number of hops means that each different URL, not just the domain, constitutes a hop; www.infoaktiv.com is the domain but www.infoaktiv.com/index.htm is the URL, as is www.infoaktiv.com/vendor.htm and going from one page to another would constitute one hop.

Web Link Cautions:

- Care should be taken, regarding the number of 'hops' specified, as a website using Frames will only register as one hop.

- Allowing 'New Windows' will open an Internet Explorer window and security of the InfoAktiv system may be compromised.

- It is recommended that access be limited as far as possible bearing in mind that hopping to a Partner website may also allow further uncontrolled accesses.

Define Custom Buttons

There are two custom buttons for the Owner to add a one-touch message facility.

Clicking the 'Edit' button next to 'Define Custom Buttons' produces the drop-down window shown here.

The following is the 'Help' text from that screen:

"This screen can be used to create the two user-defined buttons to be displayed on the listing and details collection screens of the InfoAktiv system.

You can define 2 custom buttons. These will provide the users any additional information you wish to make available to them. It can be any related information.

You can provide a caption to the buttons. This will be the text to appear on the custom button. Please note that the caption text for custom button 1 + custom button 2 should be within 45 characters.

The next step is to browse to the location of the file that contains the text to be displayed on clicking the custom button. This must be a rich text format file, i.e. with extension .rtf.

You can create the rtf file using the 'Save As' option in MS-Word and selecting the 'Save as Type' as 'Rich Text Format (.rtf) ' from the list.*
The rtf file you specify using the Browse button will be copied to the ~config directory of the content folder.

If you want to remove an already created custom button, just delete the text from the caption box."

Note: 'Rich text format' files can be created with MS Word. Content Manager will copy the files from the location specified into the ~config folder of the content folder and name them 'Companyinfo1.rtf' and 'Companyinfo 2.rtf'.

Global Settings Conclusion
This concludes the section dealing with the global settings. Don't forget, most of these can be varied at the folder and document level.

Manage Folder & Contents

The first thing to note is that we are in the 'Sample Content' directory tree and that we have a banner in place, which was selected while on the Content Wide page, but as yet, no content and no quizzes.

As normal, the 'Help' button will provide you with the information you need to use this screen, part of the text is reproduced below.

This screen consists of two parts -

1) *The left panel showing the hierarchical structure of the folders starting with the root of the active content folder and*
2) *The right panel showing the folders and files held within the active folder.*

Right click on a particular folder in the left panel shows- rename, import, cut, copy, paste, delete and create new subfolder options.

- *Rename can be used to rename the folder.*
- *Import can be used to import a folder present in some other location on your machine.*
- *Create new subfolder can be used to create a new subfolder within the selected folder.*

To demonstrate the remaining buttons I will import three folders in which my collateral resides. So I right-click on the root directory at the top of the left panel, select import and the relevant folders.

I will also add a file using the 'Add a New Item' button at the bottom left of the right hand panel.

My screen then looks like this:

The left panel now shows three sub-folders of 'Brochures', 'Presentations' and 'Video' sorted alphabetically. Firstly, I want to use the name 'Company Presentations' and I want that folder first in the list.

To change the name, double-click the cell next to the 'Presentations' folder row under the column marked 'Title' – a pop-up window appears which allows you to enter the text you want.

To change the order you will notice two arrows to the right of the screen – select the 'Presentations' folder by clicking any cell in that row, then click the 'up' arrow. You should now click the button 'Save File Sequence' at the bottom of the screen – however, you will be prompted if you leave this screen without saving the sequence.

You can replace the default folder icons with jpg/jpeg, wmf, png or gif files of your own choice. These icons can be created with any suitable graphics program, such as Microsoft PowerPoint, Paint, or Photo Editor, found under Microsoft Office Tools. A simple technique is to take a screen shot of a page, by using the 'Print Screen' button on the keyboard which copies the screen shot onto the clipboard – use paste in your graphics program to create a new picture then crop the picture relatively square and save it as a jpg, wmf, png or gif file.

For your display to look good you need to ensure that the icons you create are the right size. InfoAktiv Gallery use 270x270 pixel icons, Boxes and Curves use 90x90 pixel icons.

If you intend to use the same icons with all versions of InfoAktiv it is best to create them as 270x270.

Different types of files can be used for different effects, for example png icons can be transparent and gif files can be animated.

Tip: Icons are normally stretched to fill the available square space. If you want to avoid distortion, create a png icon with a transparent square around the image you want to be visible.

I already have some prepared earlier; double-click the 'icon' cell next to the relevant folder and then select the jpeg you wish to use. (Behind the scenes, CM will copy this to your content folder and name it the same as the folder name, i.e. the 'Presentations' folder will have a file under the content folder called 'Presentations.jpg').

You can set font style, color and text box colors for the Icons' titles by clicking on "Title Color" button.

Folder level questions can be set using the 'Folder Level Questions' section above the Contents window. You can set up 'anteview' questions that a user has to answer <u>before</u> being allowed to see the folder, or a folder-specific set of questions that override the defaults that you set on the 'Folder-Wide Settings' screen.

You may also notice that a different banner may be selected and a different title.

You can set font style, color and text box color for the screen title. Please note that fore color and back color is only applicable to the Gallery version.

The 'Keywords', 'Restrictions, Questions' and 'Email Template', cells are not active at the Folder level.

The screen now looks like this:

I now select the folder 'Presentations' and the content is displayed in the right hand panel. As the 'Help' section explains all the required details, I will not discuss all the options available here, just the basic needs.

Again a different banner could be selected and I can change the page and document titles that will appear; likewise I can use my own document icons rather than the defaults.

To select your own icons, double-click the icon cell next to your chosen folder. This opens a window that enables you to select the jpg, wmf, png or gif that you wish to use; CM will then copy it into the correct folder and display it on your screen instead of the default.

As with the folders, you can change the file sequence, the title text that displays, and the font size and color.

Having added one Icon of my own, the folder now looks like the following screenshot:

As you may note, there is a small tick box to the left of the 'Folder Level Questions' pane, the 'Take All' feature. This feature provides the ability for a User to take a copy of all of the permitted collateral within the selected folder, excluding any other folders contained within.

In the following example one of the items is a video and, as these tend to be rather large, it is not something easily emailed, printed, copied to USB or posted, so restrictions have been placed on it.

Double-clicking the 'Restrictions' cell opens up a 'Set Permissions' window, as shown below. Only actions indicated by a tick in the box are allowed.

If the movie or item is an swf file or 'Flash' movie file, this can be played in Full screen mode – just select the movie name cell and 'right-click' the mouse and a drop-down will appear allowing the selection of Full screen play mode.

PowerPoint presentations can be displayed in full-screen more by saving them as pps or ppsx files. (Note: With PowerPoint 2003 files it is enough to change the extension from ppt to pps. With newer versions of PowerPoint you need to open the file and 'Save As' a ppsx).

You can also select an '.exe' or Windows Shortcut file to start applications such as an interactive Flash movie or some other form of collateral that uses the standard Windows browser or Movie player. Please see the **Points to Note** section for caveats on the use of these file types.

As you can see, it really is very easy to set up the basic presentation, it is equally easy to set up 'keywords', 'document permissions' and 'Email templates'; if there are any problems, all the answers can be found through the 'Help' button.

You can add a comment that is displayed when the document is viewed. To do this just double click in the 'comment' column for the relevant file. You can also set font style, color and text box color for that comment. Please note that the fore color and text box color options are only available for the Gallery Version.

Quiz Setup

As you may have noticed, there is a 'Set Up a Quiz' button at the bottom of each right hand screen panel – clicking this button will bring up a blank quiz screen similar to the screenshots that follow, you just need to fill in the spaces and CM will create all the necessary files and links for you. CM will also create a folder with the quiz name.

Obviously, for a quiz you need questions and answers, but you may also need clues, retries, pass and fail messages and different question types, such as multi-choice, True/False, Open. CM gives you ways to set up all of these and the following screenshots demonstrate some of the options.

I will be setting up three questions, the first of which is a basic multi-choice with no clues. On this first screen I set up the quiz titles, whether I need to collect user details or not, pass and fail messages, retries and pass mark. Once completed I click 'Add Another'

I then set the next question; this is a 'True/False' type and uses both a picture and a video for clues that, on the actual presentation, the User can select. To include the clues, use the appropriate Browse button.

Finally, the last question, which uses a pdf document for the clue.

Before moving from this screen, please note the 'Set up Questions' button towards the top right of the screen – we will come back to this later. For now, click 'Finish'.

The folder layout will now look like the following screenshot.

So, the quiz questions are set up, but now we need to capture the user data for the quiz, to find out where to send the prizes or that cup of coffee!

Double click on the 'Win a coffee.QIZ' cell under the 'File or Folder' column and this opens up the quiz again. Alternatively, click the 'Questions' cell.

Click the 'Set up Questions' button which opens a similar window to that of the Folder-Wide Default Question design.

Use the same method to create and insert questions.

Appendix 1 - Points to Note

Security & Antivirus Software

Please note that, with web or USB access available, the customer is responsible for installing and maintaining their own anti-virus and security software which should be in accordance with their own company procedures.

Email Access

MS Outlook should be set up according to customer requirements, for instance, VPN access. It is also suggested that a 'Marketing' email address is set up separate from personal emails. This has two advantages – personal email boxes are not filled with all exhibition requests and, with a change of personnel, there is no need to change the email address for the exhibition or event.

Exec files and Shortcuts

Exec, 'exe' and application shortcut implementations should be used with care as they could compromise the security or the normal running of InfoAktiv. The following should be considered when setting up any of this type of content:

- Consideration must be given to the location of the material content and the fact that it may not be automatically copied with the InfoAktiv 'Load New' button if it is not contained within the overall content folder.
- If the material is contained within the content folder, then it should be placed in a '~config' folder so that it is not displayed as collateral content. ('~config' hides its content from the InfoAktiv display).
- Exec files that are hard-coded with the content location should be built with the above points in mind or create a Windows Shortcut by right-clicking on the exec file and copying the shortcut to the appropriate location.
- If the application allows access to the internet, then the standard security practice should be observed.
- On exiting an application started through an exec or shortcut, it is the responsibility of the application to clean-up and pass control back to the InfoAktiv application.
- None of the actions – 'Print', 'Copy to USB', 'Email', 'Contact me' will be available to an application started through an exec file or shortcut. In other words, the detail document viewing screen of InfoAktiv will not be able to be opened.
- InfoAktiv will not be able to handle any problems/ crashes/ exceptions occurring in the exec or shortcut file or its application.

While these caveats should be considered, they are not onerous, and execs and shortcuts can provide some spectacular effects. Wherever possible please ensure that the designers of this type of content are made aware of these cautions so that they can build their material to be best displayed by InfoAktiv. It is also recommended that Shortcuts be created rather than using exec files directly.

Appendix 2 - Documents & Folder Modifier Details

Owner Document Modifiers

InfoAktiv allows the User to augment a displayed file with several optional properties:

- Picture Icon
- Short Description
- Keywords
- Permissions
- Data Capture Questions

These additional properties are associated with the displayed file by creating the relevant property file, which needs to have the same filename as the displayed file, but a different extension.

The property files need to be stored in the same folder as the displayed file they relate to.

The following table shows an example assuming the User document is called <userfile1>.pdf:

File	Description / Example / Format
<userfile1>.jpg	Contains the associated picture. This should be a square jpeg and will be displayed alongside the document description on menus and beside the display window when viewing the file. These files can be created in most popular graphics applications, for example using screen capture from the document content then cropping the image. PowerPoint (as supplied) may also be used. To do this in PowerPoint: 1. Draw a square 2. Place the required images in the square 3. Group them 4. Right-click on the group and 'Save as picture' selecting the jpg format and extension. Give it the same filename and save it to the same folder as the document it is associated with.
<userfile1>.txt	Contains an optional font size followed by a short text description of the displayed document. [<font size><TAB>]Description text. This can be used to override the filename when displaying a menu. This allows: 1. Something more attractive or descriptive than the filename to be displayed to the User. 2. The filename to be modified to change the order items are displayed in. (The default order is alphabetic). 3. The underlying filename to be maintained in order to preserve company standards for document management and version control. The easiest way to create and edit these **.txt** files is with Notepad.
<userfile1>.kwd	Contains keywords. These are used by the Search form. The keywords are comma separated, e.g. "keyword1,keyword2" The easiest way to create these files is to edit them in Notepad, save them as .txt files and rename them with a **.kwd** extension.
<userfile1>.prm	Contains restrictions placed on the document. For example it may specify that the User is not allowed to print or copy the file (copyright restrictions for example), but may request a brochure. The easiest way to create these files is to edit them in Notepad, save them as .txt files and rename them with a **.prm** extension. See File Layout Definitions section for format.
<userfile1>.cuq	Contains custom questions that the User will be asked when they wish to view the file. The easiest way to create these files is to edit them in Notepad, save them as .txt files and rename them with a .cuq extension. See File Layout Definitions section for format.

Folder and sub-folder modifiers

These files, which are all optional and act at the folder level, need to be stored in the folder that they apply to.

File	Description / Example / Format
foldername.cuq	Custom questions that apply to all documents in a folder. See File Layout Definitions section for format. The file is created as a normal .txt file and the extension renamed to .cuq
<foldername>.txt	Contains a short text description of the displayed folder. This can be used to override the filename when displaying a menu. This allows: 1. Something more attractive or descriptive than the folder name to be displayed to the User. 2. The folder name to be modified to change the order folders are displayed in. (The default order is alphabetic). 3. The underlying folder name to be maintained in order to preserve company standards for document management and version control. The easiest way to create and edit these .txt files is with Notepad.
qactions.txt	Defines what questions are asked when certain actions are performed: email action, print action, contact me action, etc. This file overrides the qaction file in the config folder and like foldername.cuq applies to all documents in the folder.
anteview.cuq	Questions that are asked on entering the folder (before viewing allowed) See File Layout Definitions section for format The file is created as a normal .txt file and the extension renamed to .cuq
<Brandname>.brd	An image that, if it exists, is displayed at the top of a listing screen. The owner can use this to customise systems. A .brd file in a sub-folder has priority over any .brd file that may be on the Content Folder's "~config" folder. This is a bitmap file with its extension renamed from '.bmp' to '.brd'. The image will be stretched to 1280x95 pixels so to prevent distortion it is advisable to create the banner as an ***1280x95 pixel image.***
title.txt	Contains text that is displayed as the title to the listing screen.
fileorder.lst	Contains the sequence that the files or directories should be displayed in.
userhelp.rtf	This is an optional file. Its text is displayed when the User presses the Help button. It applies to all documents within the folder. It is a rich text file.
userhelp.jpg	This is an optional file. It holds a picture that will be displayed alongside the help text.

Whereas qaction applies to all items in the Content Folder or sub-folder, .cuq files can be used to tailor the questions that Users are asked before performing actions on specific documents or before entering a folder. They are comma separated variable files, edited with Notepad and work in a similar way to qaction.

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