Continuity
"A Virtual Workplace"

User Manual

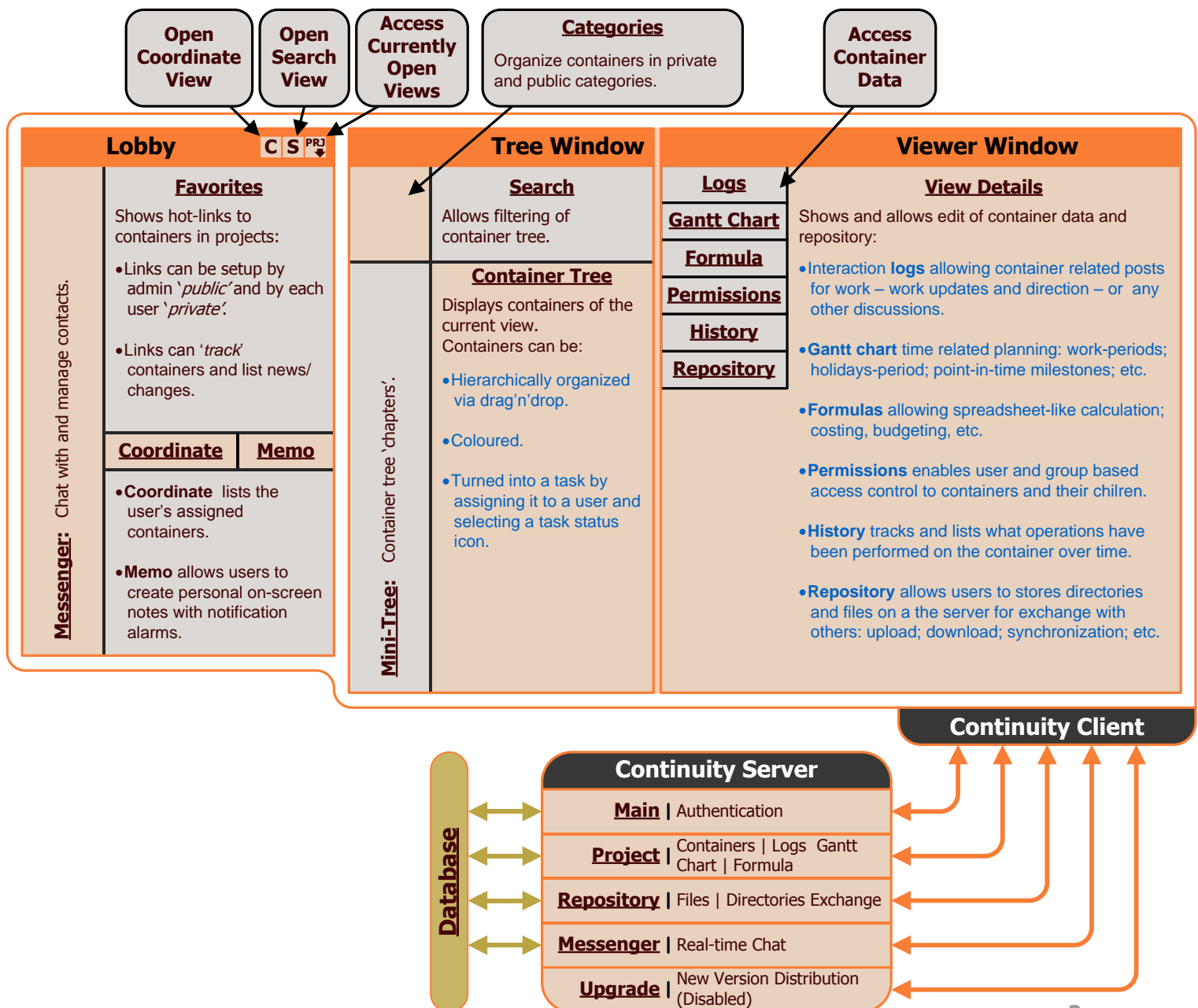# Table of Contents

Overview

Schematic View

The Continuity **client** consists of one application made up of several modules that each provides different functionality to the user.

Each client module exchanges data with a corresponding **server** service. The corresponding service then communicates with the MySQL **database** that stores and retrieves all critical information.

Open Coordinate View

Open Search View

Access Currently Open Views

Categories
Organize containers in private and public categories.

Access Container Data

Lobby C S PRJ

Messenger: Chat with and manage contacts.

Favorites
Shows hot-links to containers in projects:

- Links can be setup by admin '*public*' and by each user '*private*'.

- Links can '*track*' containers and list news/ changes.

Coordinate	Memo

- **Coordinate** lists the user's assigned containers.

- **Memo** allows users to create personal on-screen notes with notification alarms.

Tree Window

Mini-Tree: Container tree 'chapters'.

Search
Allows filtering of container tree.

Container Tree
Displays containers of the current view.
Containers can be:

- Hierarchically organized via drag'n'drop.

- Coloured.

- Turned into a task by assigning it to a user and selecting a task status icon.

Viewer Window

Logs
Gantt Chart
Formula
Permissions
History
Repository

View Details
Shows and allows edit of container data and repository:

- Interaction **logs** allowing container related posts for work – work updates and direction – or any other discussions.

- **Gantt chart** time related planning: work-periods; holidays-period; point-in-time milestones; etc.

- **Formulas** allowing spreadsheet-like calculation; costing, budgeting, etc.

- **Permissions** enables user and group based access control to containers and their chilren.

- **History** tracks and lists what operations have been performed on the container over time.

- **Repository** allows users to stores directories and files on a the server for exchange with others: upload; download; synchronization; etc.

Continuity Client

Database

Continuity Server

Main | Authentication

Project | Containers | Logs Gantt Chart | Formula

Repository | Files | Directories Exchange

Messenger | Real-time Chat

Upgrade | New Version Distribution (Disabled)
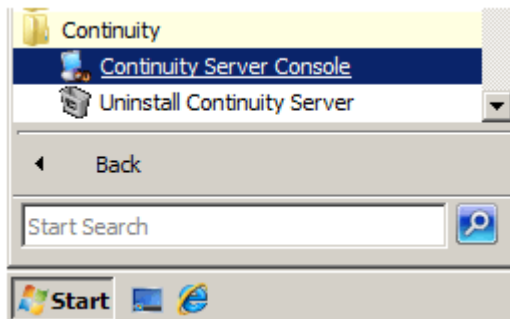
Server: Server Console

Overview

The Server Console is the application that the administrator uses on the server side to configure and manage Continuity.

To **open** the Continuity Server Console, click the desktop icon called Continuity Server Console:


Alternatively, open it thru the Start menu:

To **exit** the console, open the console-menu and choose Exit or use the keyboard shortcut keys Alt+F4.

Services

This console that then opens lists the Continuity services: Main; Project; Repository; Messenger; Upgrade - alongside with their port number and their status. If a service is displayed in gray font, this means that it is not installed or that it has been disabled.
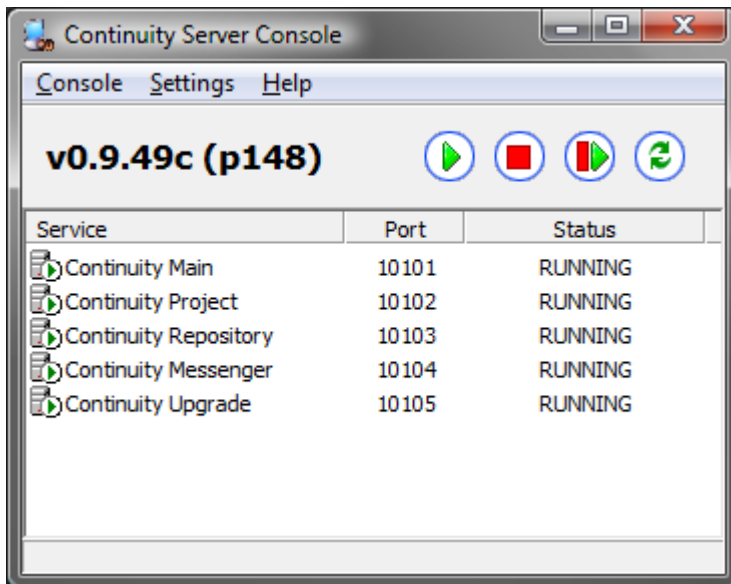
Thru the server console the enabled services can be started and stopped.

To start one/multiple services, select them in the list and hit the start icon: ⊙ or right-click and select **Start** from the menu that pops up and their status will change to 'RUNNING'. To start all services, this menu also gives you the option to **Start All**.

To stop one/multiple services, select them in the list and hit the stop icon: ◼ or right-click and select **Stop** from the menu that pops up and their status will change to 'STOPPED'. To start all services, this menu also gives you the option to **Stop All**.

To restart one/multiple services, select them in the list and hit the restart icon: ⊙ or right-click and select **Restart** from the menu that pops up. To start all services, this menu also gives you the option to **Restart All**.

To reload the service list, simply hit the reload icon: ⟳ or right-click and select **Reload** in the menu that pops up.

Console-Menu

Send Messages

From here you can send an instant message to all connected clients, which is useful for example when you need to stop the Continuity server for a reboot or other maintenance.

Simply type your message in the window that appears, and click '**Send**'.

If this happens frequently, you can save a message as a template before sending it so that you do not need to rewrite it every time. Simply type your message in the same window and click '**Save**'. The message will then be listed among other possible templates in the template drop down box.
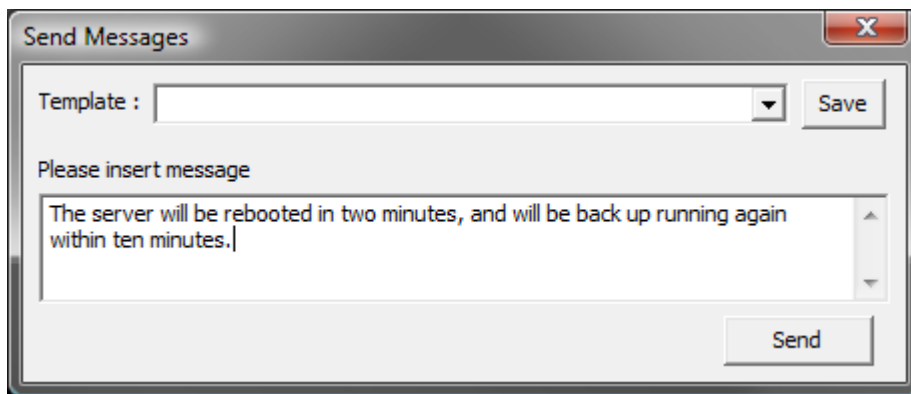
The resulting message instantly displayed on all connected clients looks like this:
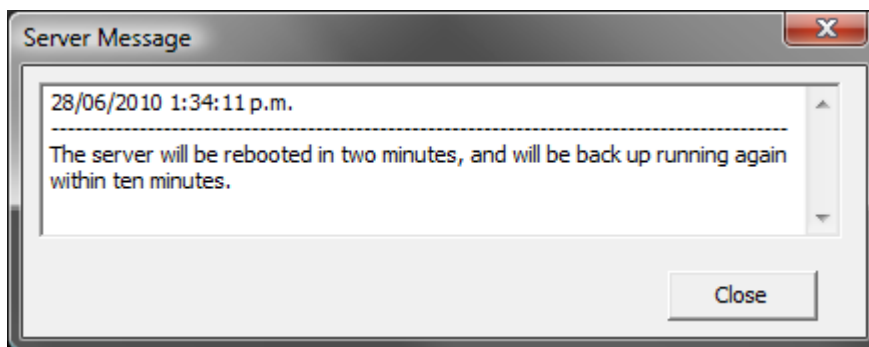
Connections

This displays all active client connections per service. Use the tabs at the bottom to view the different services: Main; Project; Repository; Messenger; Upgrade.
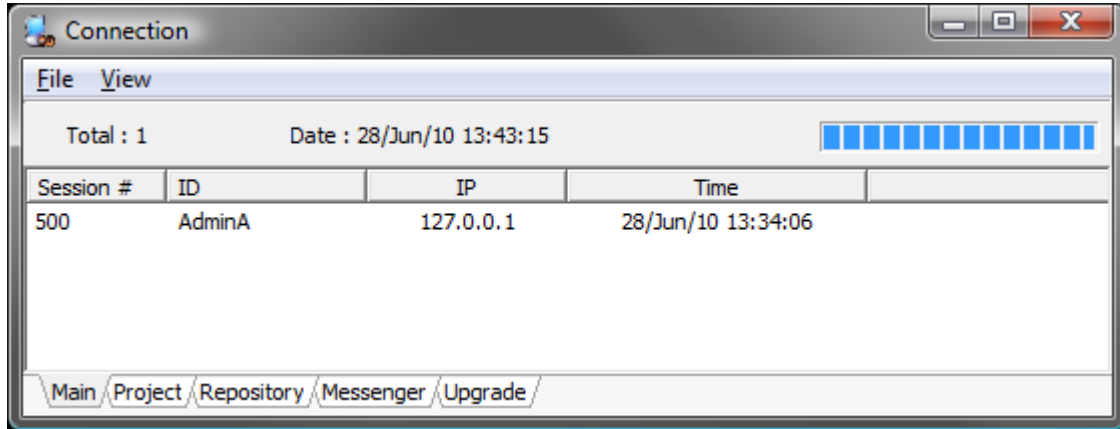
To change the update speed, go to the View-menu and choose **Update Speed**. Then select 'High – 2 sec', 'Normal – 5 sec', 'Low – 10 sec' or 'Paused'. Default is Normal. To refresh immediately manually, go to the View-menu and choose **Refresh Now**.

To exit, open the File-menu and choose **Exit**.

Database Pool

This displays active database connections per service. Use the tabs at the bottom to view the different services: Main; Project; Repository; Messenger.
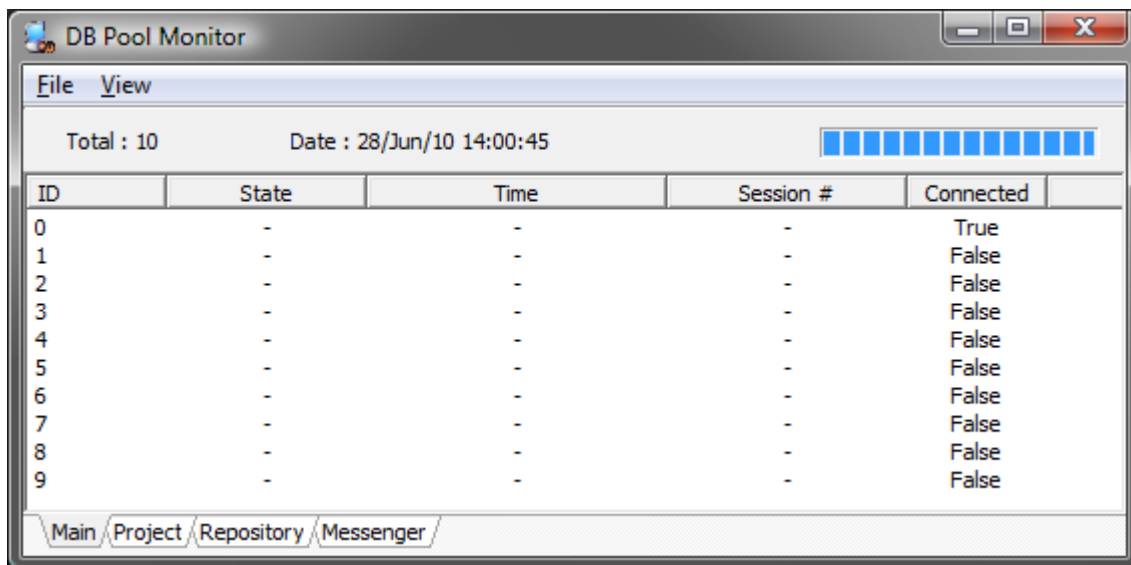
To change the update speed, go to the View-menu and choose **Update Speed**. Then select 'High – 2 sec', 'Normal – 5 sec', 'Low – 10 sec' or 'Paused'. Default is Normal. To refresh immediately manually, go to the View-menu and choose **Refresh Now**.

To exit, open the File-menu and choose **Exit**.

Logs

This is where server logs can be accessed. To open the log directory, go to the Logs-menu and choose Log Directory. From here you can access logs by date. To access logs from today's date directly, simply choose Main Service Log; Project Service Log; Repository Service Log; Messenger Service Log; Upgrade Service Log; Console Log.

To open the log directory for conversations/messages, go to the Logs-menu and choose Conversation Log Directory.

Settings-Menu

User Accounts

This is where user accounts are managed.
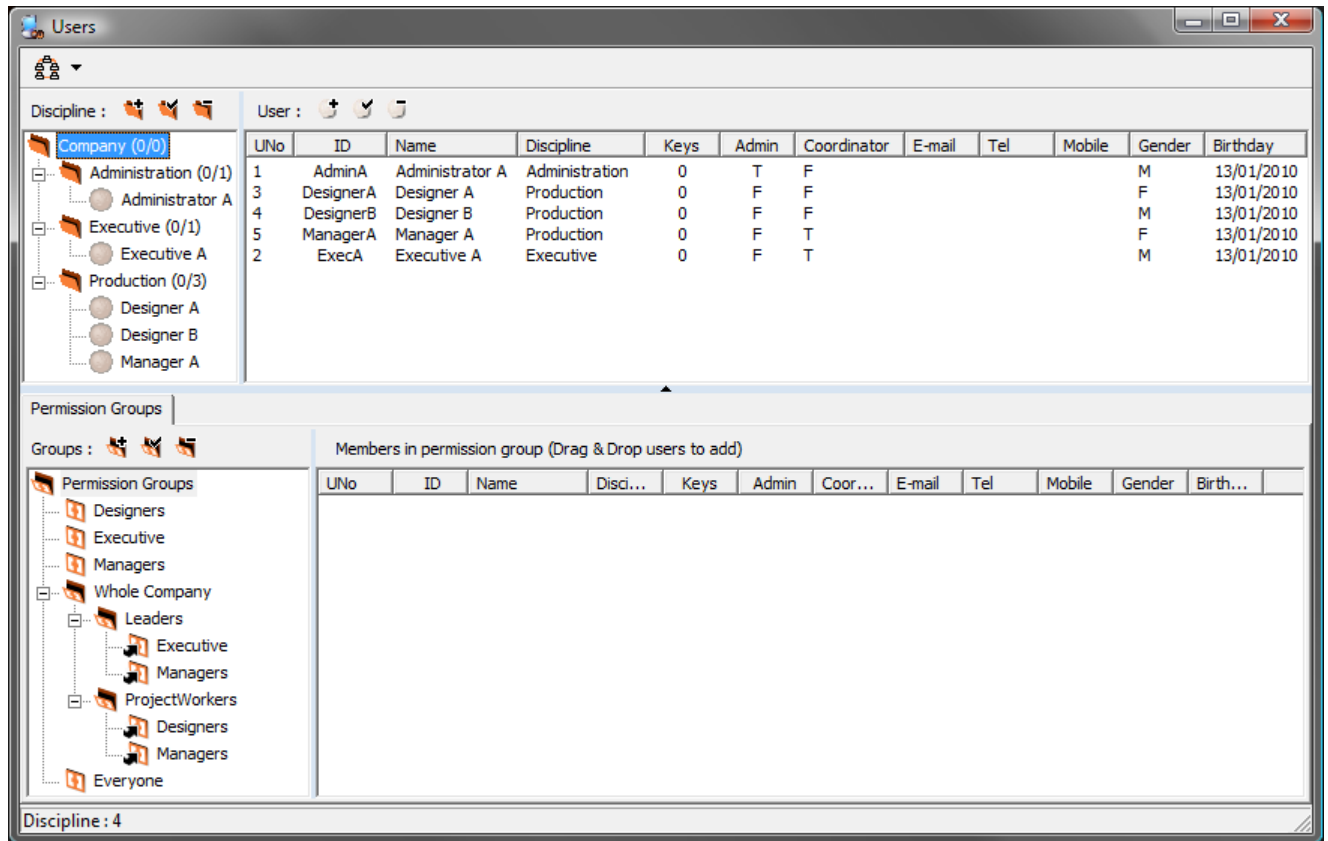
Users

To add a new user, click the new user icon: ⊕ or right-click and choose **Add User** in the menu that pops up. Then enter the desired ID for the new user in the window that pops up:
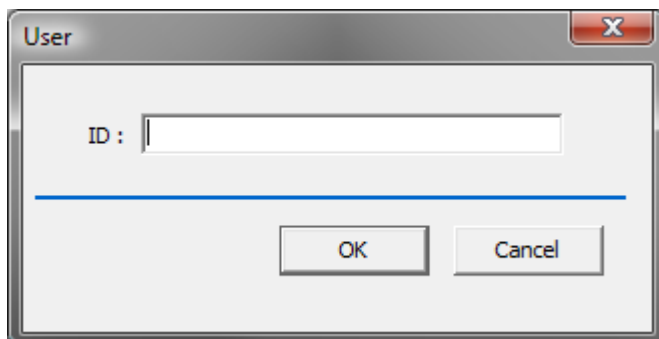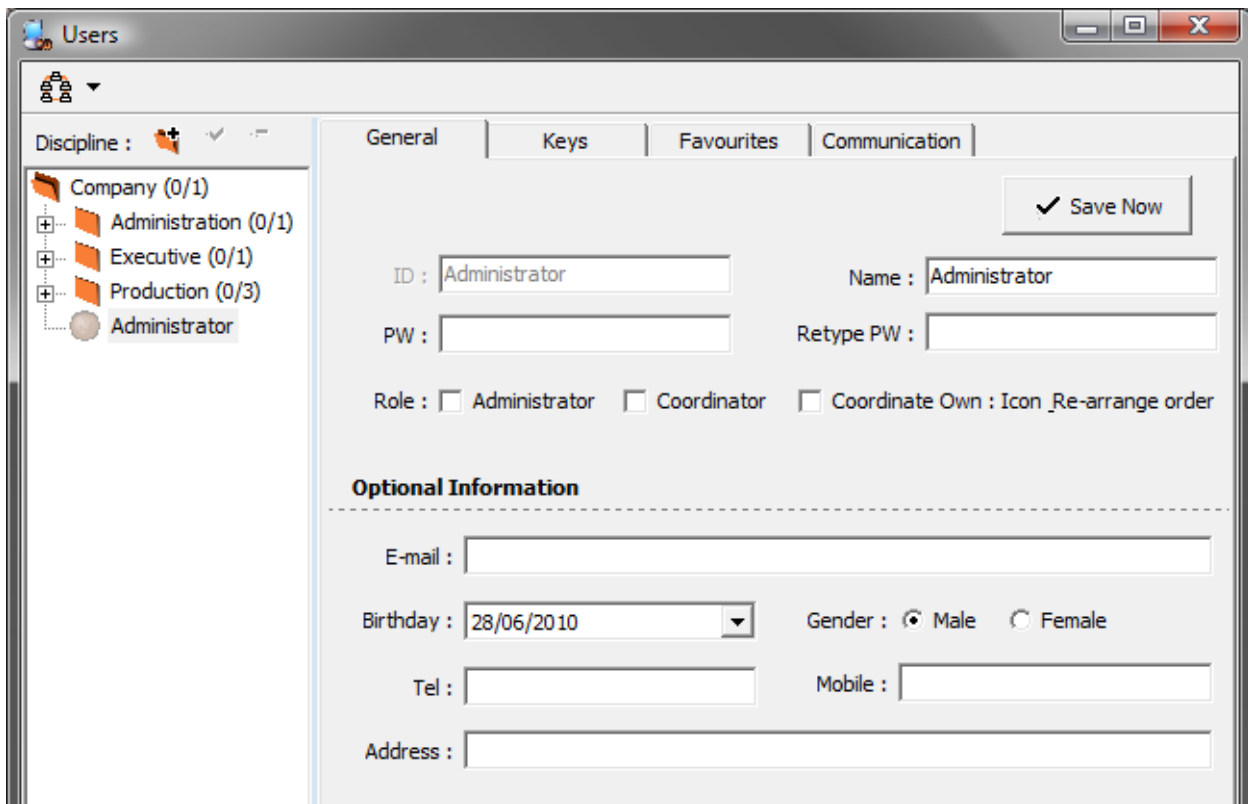
Your new user will be listed in the user list to the left and the tabs where the user can be configured are displayed. In this example the user 'Administrator' has been added.

To delete a user, select it in the user list – accessed by clicking the discipline this user belongs to in the left-hand side field – and click the delete user icon: ⊖ or right-click and choose **Delete User** in the menu that pops up.

To modify the properties of an existing user, select the user in the user list – accessed by clicking the discipline this user belongs to in the left-hand side field – and click the modify user icon: ✓ or right-click and choose **Modify User** in the menu that pops up.

To reload the user list, right-click in the list and select **Reload** from the menu that appears.

General: Under this tab, the (display) name can be changed in the **Name** field and a password can be set by entering it in the **PW** field and in the Retype PW. By ticking the check-boxes under **Role**, high-level privileges can be given to this user. Administrator has automatically full access to everything when logging on to the Continuity client. Coordinator has the ability to assign containers to other

users. Coordinate Own means that the user can freely change status icons of containers assigned to themselves and they can freely rearrange their assigned containers in the Coordinate View.

Optional information can be entered into the fields at the bottom: **E-mail**, Telephone number (**Tel**), **Mobile** and **Address**. Defining a user's **Birthday** is done either by entering the desired date directly in the field, or by bringing up the true Calendar and picking a date. The user's **Gender** can also be defined by selecting Male or Female.

The details are automatically saved when you close the window or switch from this view, but if you wish to save changed immediately while staying in this view – simply click the 'Save Now' button at the top left.

Keys: Not yet available in this version of the manual.

Favourites: Not yet available in this version of the manual.

Communication: Not yet available in this version of the manual.

Coordinate: For users where the Administrator or Coordinator roles have been granted (under the 'General' tab), this fifth tab – Coordinate – appears. As administrators and coordinators both can assign a coordinator to a container, this is where you set up the list of users that they get to choose from for this assignment. All coordinators will be listed, simply check the tick-boxes of the users that you would like to be listed for the user when picking a coordinator.

The details are automatically saved when you close the window or switch from this view, but if you wish to save changed immediately while staying in this view – simply click the 'Save' button at the top left.

<u>Disciplines</u>

Disciplines is a good way of organizing the users into groups if you do not want to keep all users in the root discipline. This tree structure is used on the client side when a user wants to add another user to their list of contacts for Continuity's instant messenger and when a user selects among users to set up container and repository permissions. To **move** a **user** from one discipline to another, simply select the user, then drag and drop it into the destination discipline.

To add a discipline, click the add discipline icon: or right-click and choose **Add Discipline** in the menu that appears. A new window will appear where it lets you name your new discipline. Click 'OK' to confirm.

To modify a discipline, select it and click the modify discipline icon: or right-click and choose **Modify Discipline** in the menu that appears. A new window will appear where it lets you rename the discipline. Click 'OK' to confirm your new name.

To delete a discipline, select it and click the delete discipline icon: or right-click and choose **Delete Discipline** in the menu that appears.

<u>Permission Groups</u>

The groups organized here can be used when setting up permissions for more than one user on the client side. To add a user to a permission group, simply select the user in the user lust and drag and drop into the destination permission group.

Servers

This is where you define **host name** and **port** for your Continuity Servers.

When you wish to change the port for a service altogether, this is a two-step process because of Continuity's load balancing feature – placing its services on physically separate servers. First, change the service's port in the Options dialogue box also accessible thru the Settings-menu. As the second step – to also apply the new port of your service to your associated server – do this in this Servers menu.

For the 'Continuity Main' service – the connection point for all the clients – enter your machine's hostname/IP address and the port number as defined in the Options dialogue box and click 'Update'...
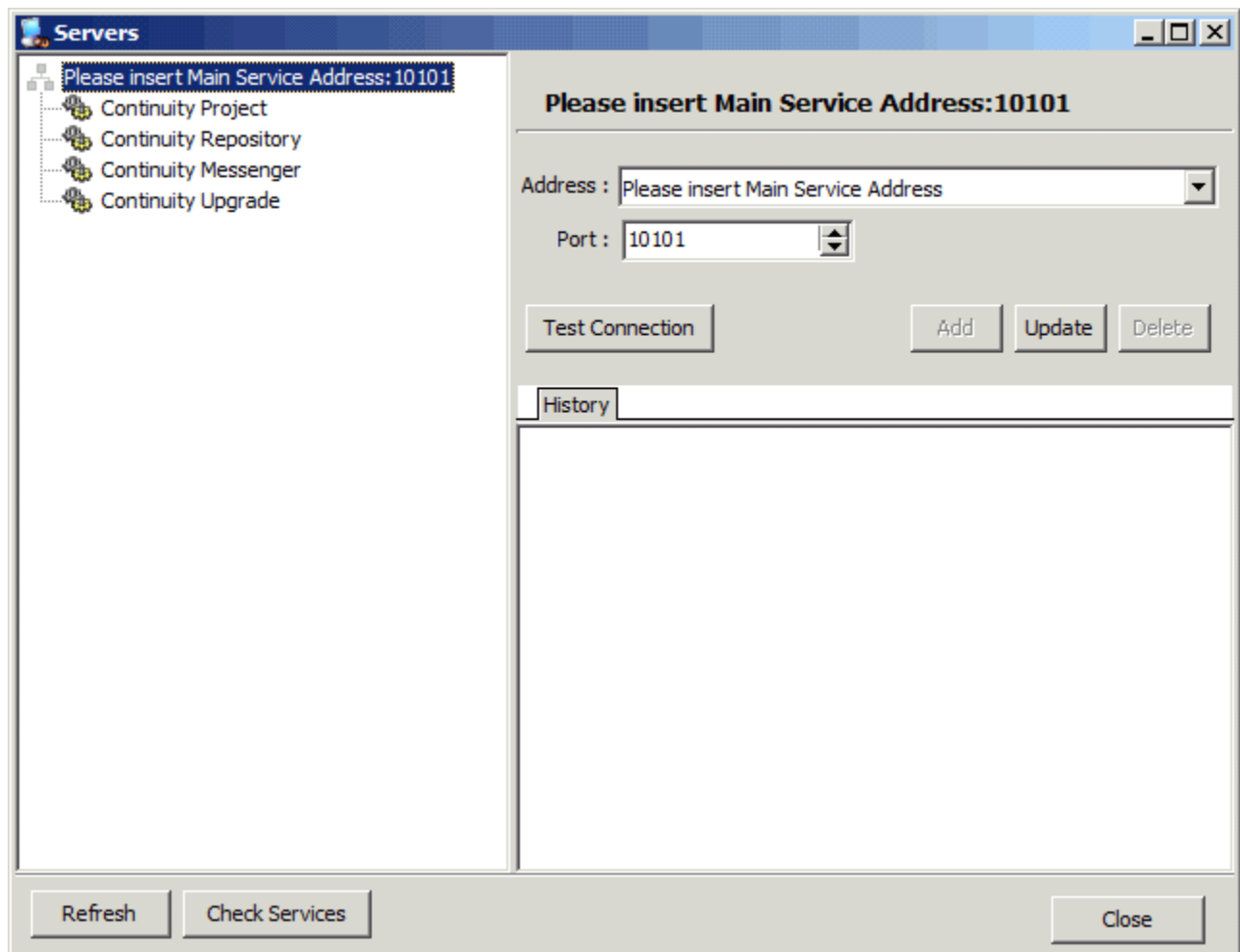
Repeat the same steps for the remaining servers: 'Continuity Project'; 'Continuity Repository'; 'Continuity Messenger'; 'Continuity Upgrade'...
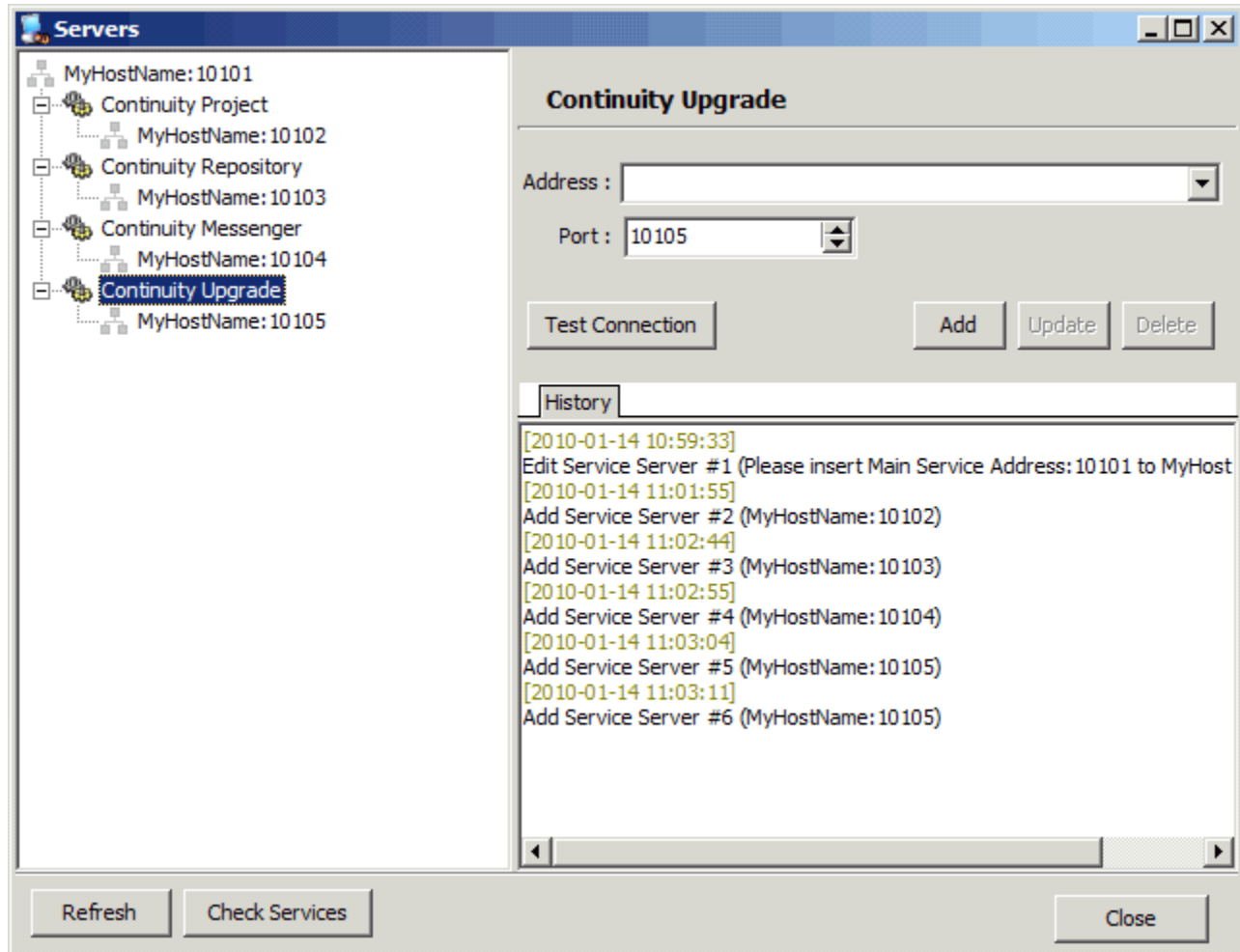
Then click 'Close'.

If you've changed a port number and it is not displayed in the Server Consoles server list, then exit the Server Console and open it again; this is because there is a **known bug** where the new port is not displayed until the next time the Server Console is opened.

Contact Request

This is where communication contact requests are displayed; when a user requests to add another user to their contact list for Continuity's instant messenger.

To **approve** a contact request, simply check the tick-box next to this request in the list and click the 'Approve' button. To **deny** a contact request, keep the tick-box unchecked and then click the 'Approve' button.

To reload the list to see any new requests, click the 'Reload' button. To close the window, press 'Cancel'.
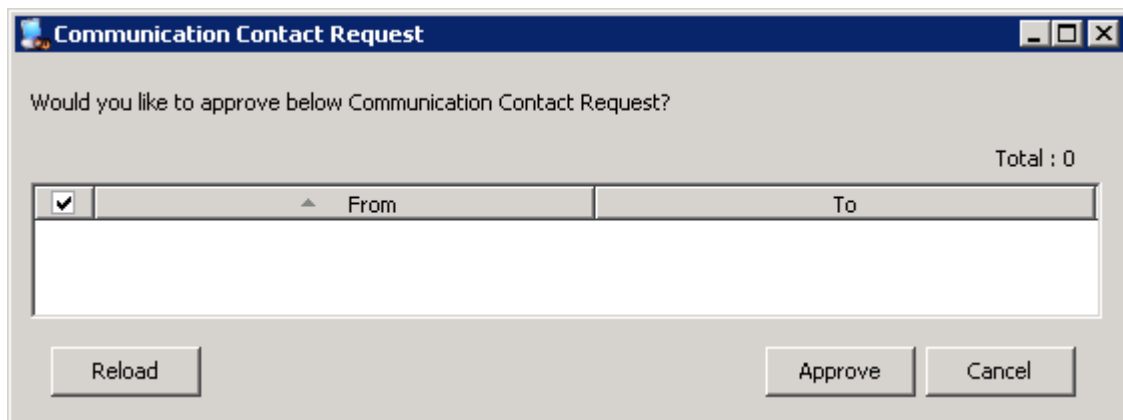
Upgrade

This is for the Upgrade Service's automatic distribution of new versions, which is disabled in the currently released versions of Continuity.

Project Container Types

This is where container types are created and modified. Types is a good way of categorizing different containers, and are also used in formulas to make container related calculations under the client's formula tab.

Field Groups

Not yet available in this version of the manual.

Project Container Types

Not yet available in this version of the manual.

Global Formulas

Not yet available in this version of the manual.

Public Favourites Preset

To simplify the set-up of public favourites for each user, the administrator can here define presets that then can be applied to each user under their Favourites tab in the User Accounts window.

Add New (Preset)

To create a **preset**, right-click in the left-hand side Presets field and choose Add New... in the menu that appears. Give your preset a name in the window that appears:
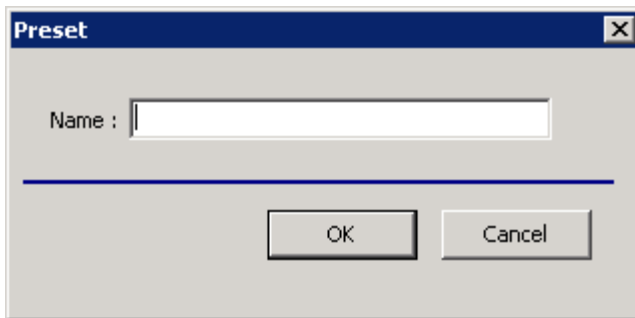
Then click 'OK' and your preset will be listed in the Presets field.

Add Group

To then set up **favourites** for this preset, you first need to create a group. To do so, right-click in the Favourites field to the right and select Add Group.
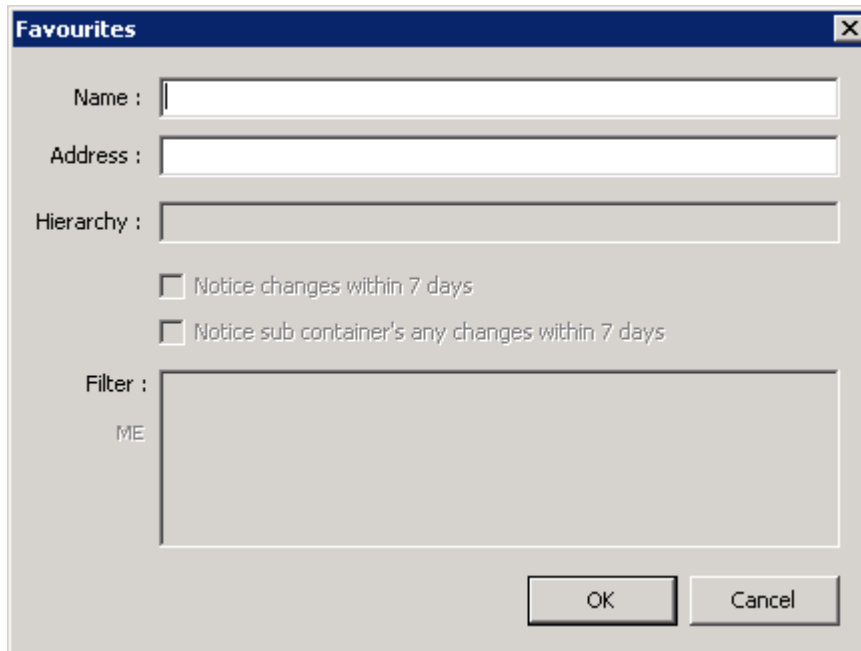
A window appears.
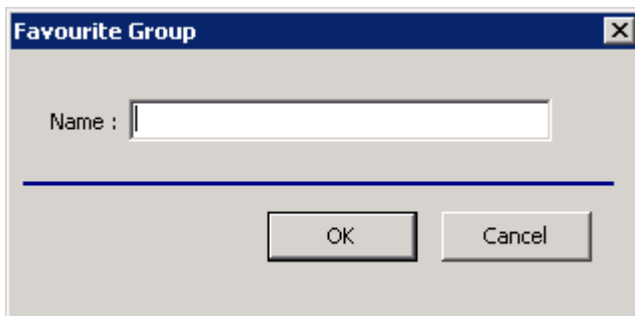
Give the group a name. Choose 'OK' and the group's name appears under Favourites.

Add Favourite

Now right-click in the Favourites field again and select Add Favourite and a window will let you name the favourite. Into the address field type or paste the address of a container or repository directory location in Continuity.

If your favourite is a container in the tree, this window will also let you choose to be "notified of changes within seven days". Select this if you want to track changes made to this container. Then another box will ask you if you want to be notified *of sub-containers* any changes over the last seven days - if you do then tick this as well.

Once you click OK, the new favourite will appear under Favourites.

Save/Load Public Preset To/From File

To simplify the set-up further, when setting up more than one public preset (with different favourite presets for different departments for example) - you can save and load presets to/from a fav-file.

Simply right-click in the Favourites field and select '**Save Public Preset To File**', give it a name and save it to your desired location in the window that appears.

To load your saved preset when setting up another preset, simply right-click in the Favourites field and select '**Load Public Preset From File**', and browse for the desired saved preset.

This way it is very easy to make slight variations of public favourite presets for different departments in your organization depending on who you want to access what from their Lobby.

Modify (Preset)

If you want to make changes to a preset in Favourites - select it in the left-hand side field called Presets, right-click and choose Modify. A window will appear where you can change the name of it. Press 'OK' to confirm the new name.

Delete (Preset)

If you no longer wish to keep a particular preset, select it in the left-hand side field called Presets, right-click and select Delete.

This window will appear. Choose 'Yes' and the preset will be removed from this list.
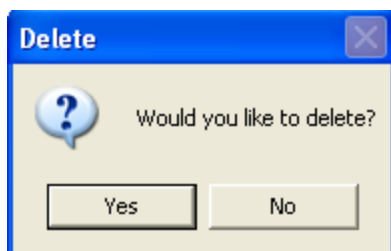
Modify Favourite

If you want to make any changes to a link in Favourites - select it in the right-hand side field called Favourites, right-click and choose Modify Favourite.

A window will appear where you can change the name of the link and the selection for notification criteria.

If you check the tick-box 'Notice changes within 7 days', a notification will appear on the Lobby when changes have been made to this container.

If you check the tick-box 'Notice sub container's any changes within 7 days', a notification will appear on the Lobby when changes has been made to this container <u>or</u> its sub-containers.

When you are happy with your changes hit 'OK'.

Delete Favourites

If you no longer wish to keep a particular favourite, select/multiselect it/them in the right-hand side field called Favourites, right-click and select Delete Favourites.

This window will appear. Choose 'Yes' and the favourite(s) will be removed from this preset.
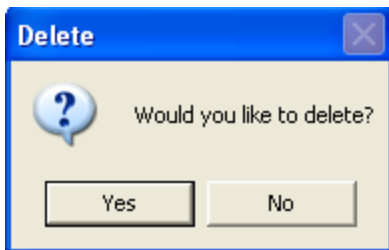
Modify Group

If you want to make changes to a group in Favourites - select it in the right-hand side field called Favourites, right-click and choose Modify Group. A window will appear where you can change the name of it. Press 'OK' to confirm the new name.

Delete Group

If you no longer wish to keep a particular group, select/multiselect it/them in the right-hand side field called Favourites, right-click and select Delete Group.

This window will appear. Choose 'Yes' and the group(s) will be removed from this preset.
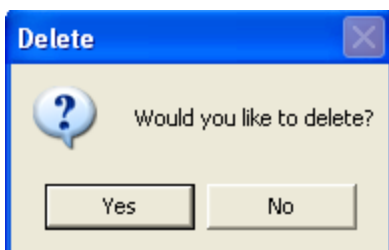
Reload

To reload the list of presets, right-click in the left-hand side **Presets** field and select Reload from the menu that appears.

To reload the public favourites of a preset, right-click in the right-hand side **Favourites** field and select Reload from the menu that appears.

Import Project Containers

This server feature is very useful for an organization with an existing file structure of their work data that starts using Continuity projects to organize and track their projects. This lets you convert your existing directories and files and import them as project containers. Automatically it creates a Continuity project for you based on your current structure. Directories become containers and files become log attachments.

To use it, make sure the project service is stopped first then follow the steps thru this dialogue box.
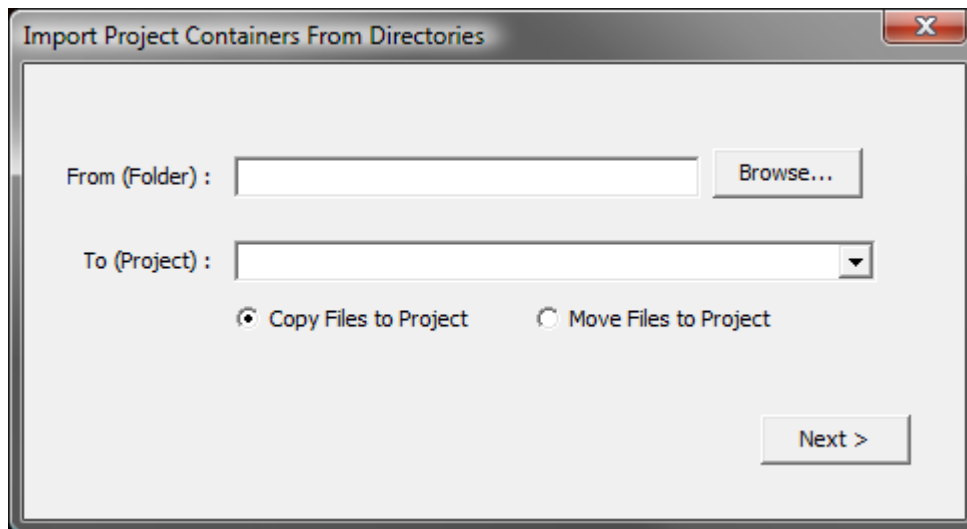
Options

<u>General</u>
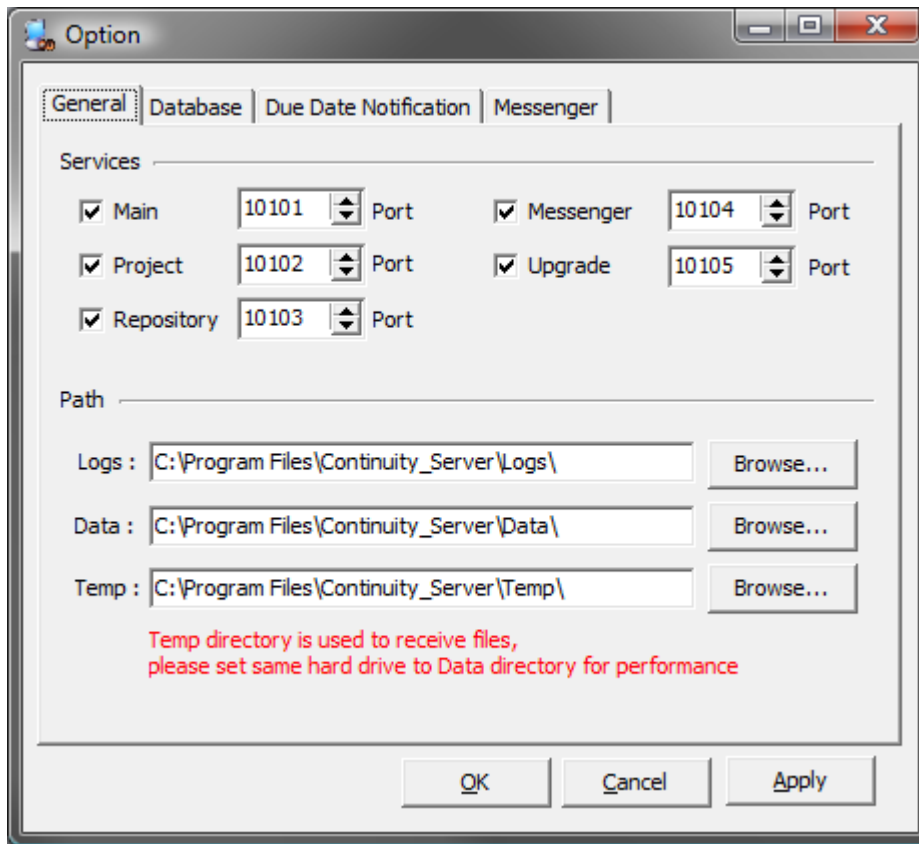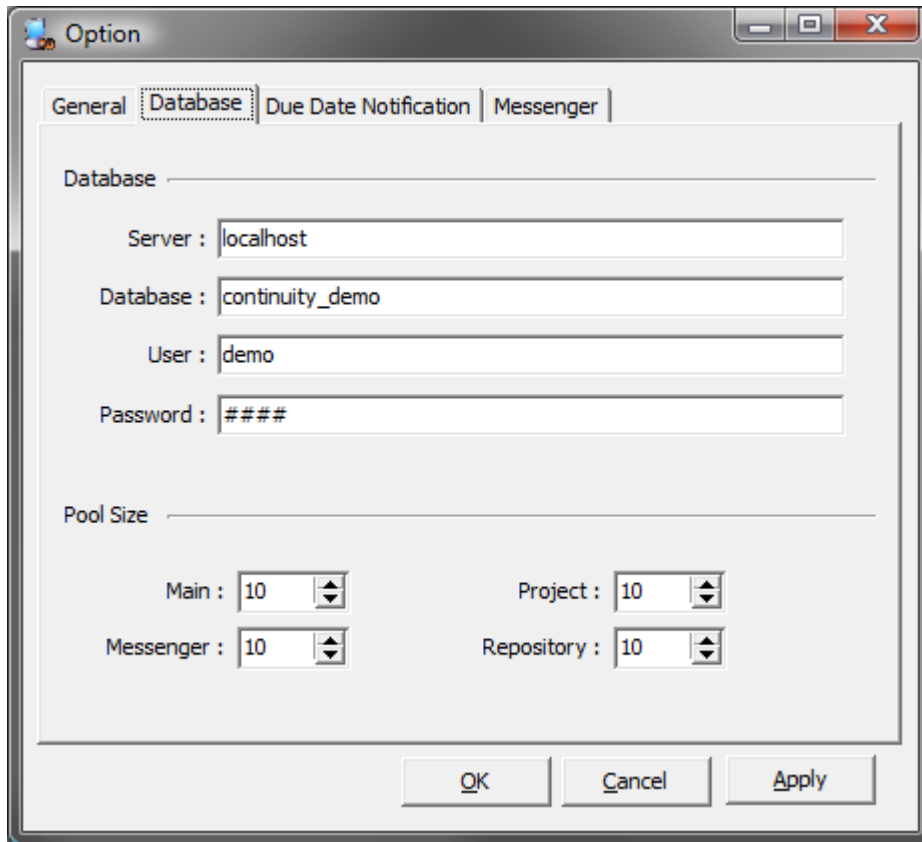
In the top part of this dialogue, **Services**, you can completely disable or enable the different services: Main; Project; Repository; Messenger; Upgrade - and select a different port for them.
When you wish to change the port for a service, this is a two-step process because of Continuity's load balancing. First, change the service's port in this Options dialogue box. When you click OK, you will be asked to restart that service. When restarted please exit the Server Console and open it again; this is because there is a **known bug** where the new port is not displayed until the next time the Server Console is opened. As the second step – to also apply the new port of your service to your associated server – do this in the Servers dialogue box also accessible thru the Settings-menu.

You can here also, under **Path**, select a location for storing various data. **Logs** stores logs; **data** is the path where all data of Continuity is stored (log attachments, repository files, etc) and **temp** is where temporary files are received. For best performance, select the same hard drive for the data location and the temp location.

Database

These are the settings for the **database**. It lets you enter the name of the server, the name of the database, the user name and the related password.

You can here also change the **pool size** of the four services that interact with the database: Main; Project; Repository; Messenger.

Due Date Notification
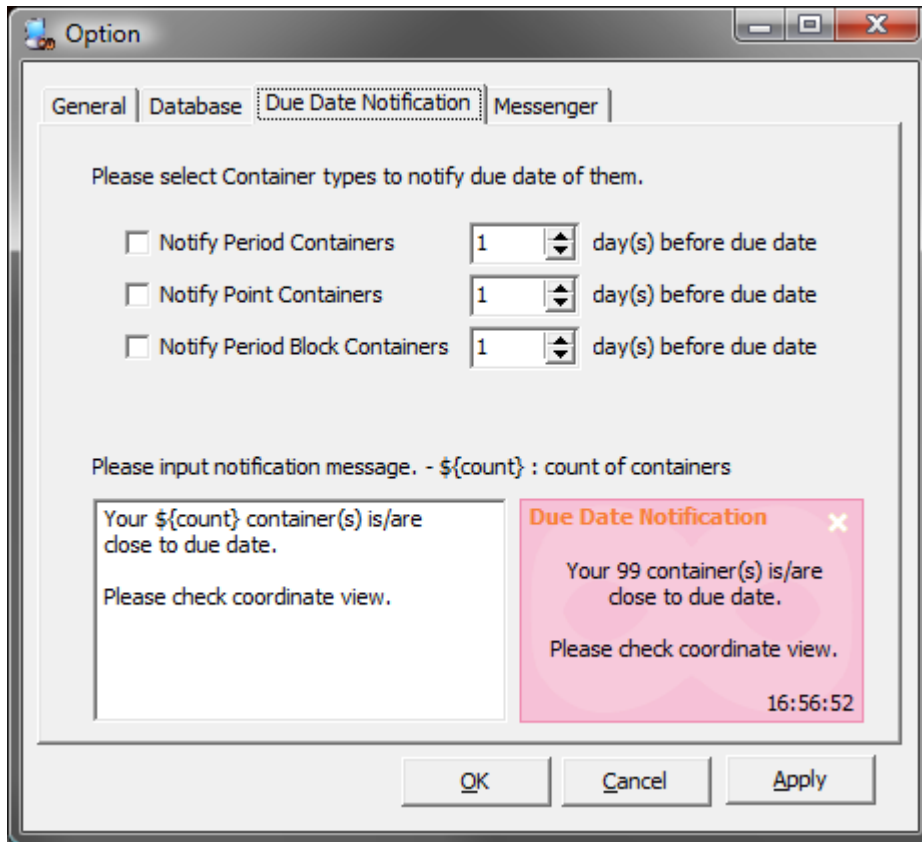
From here you can manage notifications for assigned containers that are close to their due date in the Gantt chart on the client side.

Enable the **Gantt chart types** for which you wish notifications to be displayed by ticking the adjacent check-box: Period, Point and/or Period Block. When enabled, a pink pop up notification will appear on client logon to inform the user how many of their active containers - tasks - are close to their due date. For each type you can here define how many **days before** the **due date** that you want such a notification to appear. Enter the desired amount of days or use the up/down pointing arrows to increase/decrease amount of days.

In the text field to the bottom you can also rewrite the default **notification message**. '${count}' can be used in your message, and will be replaced by the count of containers that are close to their due date – like '99' has replaced the '${count}' in the screenshot above.

Messenger
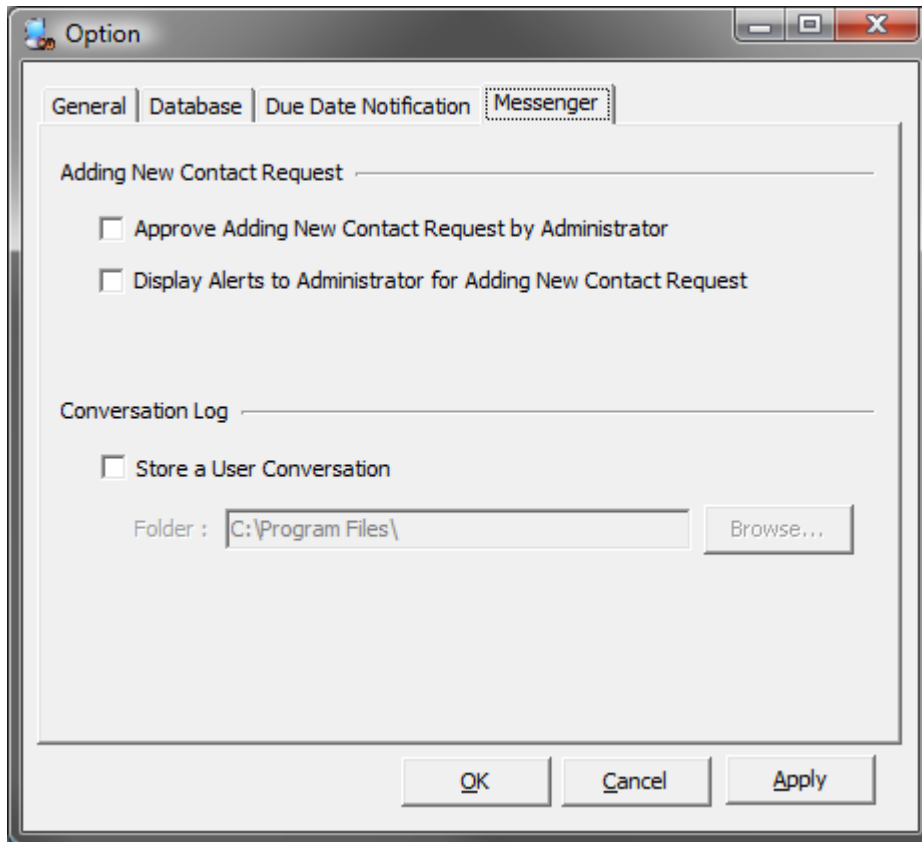
If the first tick-box under **Adding New Contact Request** 'Approve Adding New Contact Request by Administrator' is ticked, the addition of each contact needs to be approved on the server side so that the administrator can control who talks to whom within the server's users.

If also the second tick-box 'Display Alerts to Administrator for Adding New Contact Request' is checked, each administrator will be notified thru a notification pop-up on the client side when there is a new contact request so that they can log on to the server and approve or deny it.

You can here also, under **Conversation Log**, select a location for storing chat logs for all users – or disable this option.

Help-Menu

If you select **About** in this menu, the following information window appears:
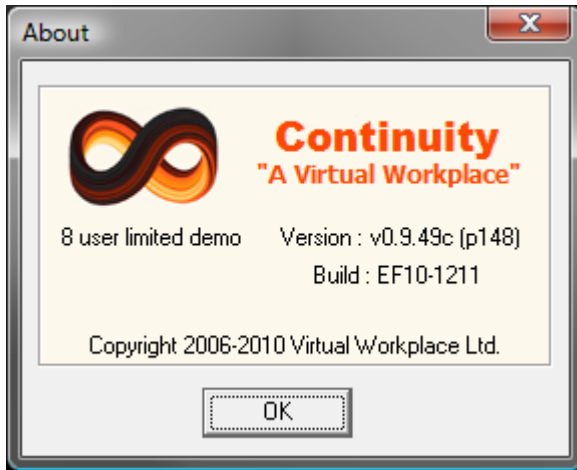
It is useful to find out not only the **Version** but also the **Build** of your current Continuity server.

Client: A First Glimpse

The Main View of Continuity

This is the main view of Continuity featuring: the **Lobby**; the **Tree Window** and the **Viewer Window**.
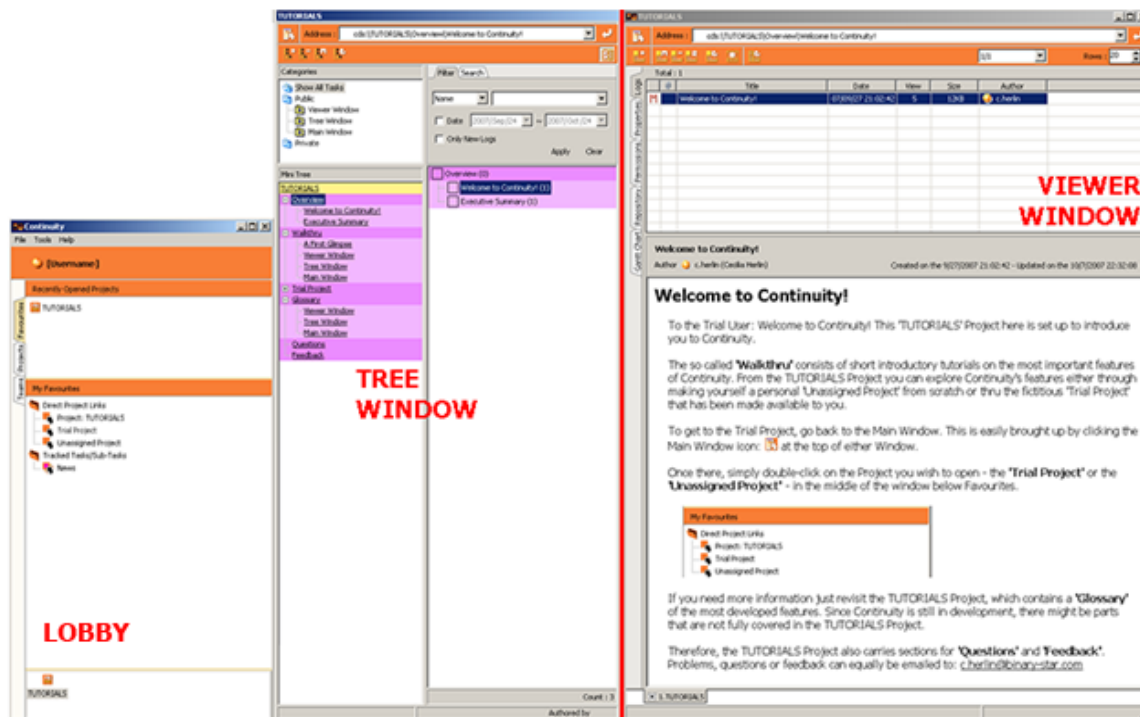
Navigating Within Continuity

Address Bar

At the very top of all windows is the address bar - which shows where you are.

Anytime you see a path that begins with **'ccn:\'**, this refers to a specific container - a view or place in Continuity. The paths beginning **'crp:\'**, this refers to a location in Continuity's repository. Simply copy/paste, or write the name of the path where you wish to go in any of the address bars. It will then take you there - similar to a web-browser.

Viewer Window Tabs

At the bottom left of the **Viewer Window** you will see that there is a single tab which gives the name of the project you are currently 'in' when in the Project View, 'C' for Coordinate View and 'S' for Search View when in these views.
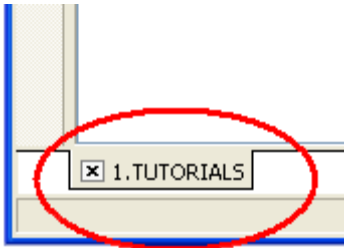
You can have more than one view and several projects open at one time.

Opening Projects (Lobby)

To the left of the Address Bar in the Tree Window and Viewer Window is the Lobby icon: . Click this to bring up the Lobby. Alternatively, right-click on a Viewer Window tab and select "Show Main" in the menu or "Show" in this right-click menu on the taskbar to bring up the Lobby.
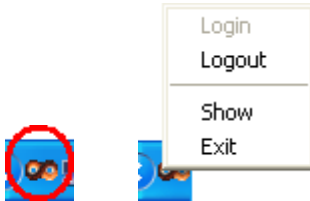
Once there, double-click a link in your Favourites section (or alternatively in the Projects section if you're an administrator). Alternatively, select the link and right-click and choose 'Open' from the menu that appears.

You will be taken to the Tree Window and Viewer Window for that location - and at the bottom of the screen another gray tab with that project's name will appear.
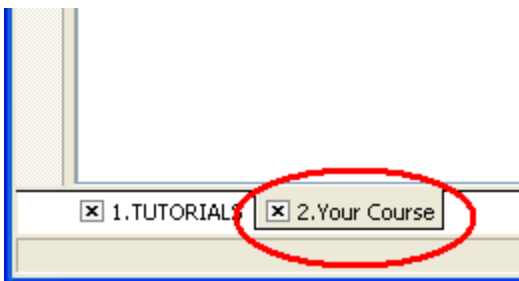
The tab highlighted in gray shows the project you are currently working in.
If you wish to have another tab open of a project that you already opened in a tab, select the project's link in your Favourites section and right-click. Choose '**Open in New Tab**' from the menu that appears and a second tab of this project will appear.

Switching Between Views

To switch from the current view to another open view, either click on the tab for that view or press the 'Alt'-key, and simultaneously the number (1, 2, 3 etc) of the tab you also wish to view.
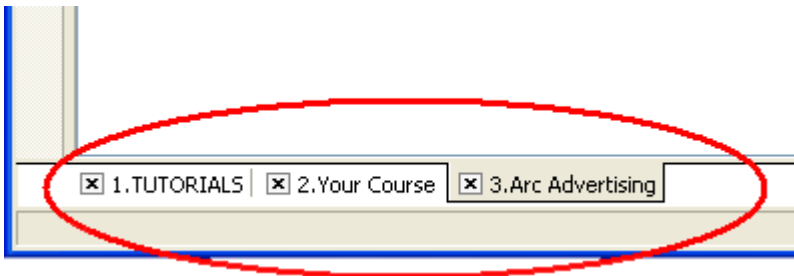
Closing an Open View

To close an open view, either right-click on the gray tab and from the appearing menu select 'Close' or 'Close All' to close all opened views or click the 'x' at the top right of the Viewer Window for that view.

Continuity Editor

To open the Continuity Editor, click the desktop icon called Continuity Editor:

This is a text and image editor that can be used offline. The Continuity Editor makes any further word processing programs unnecessary. Its use is covered in the Logs chapter, with the exception of the top part, which only works online.
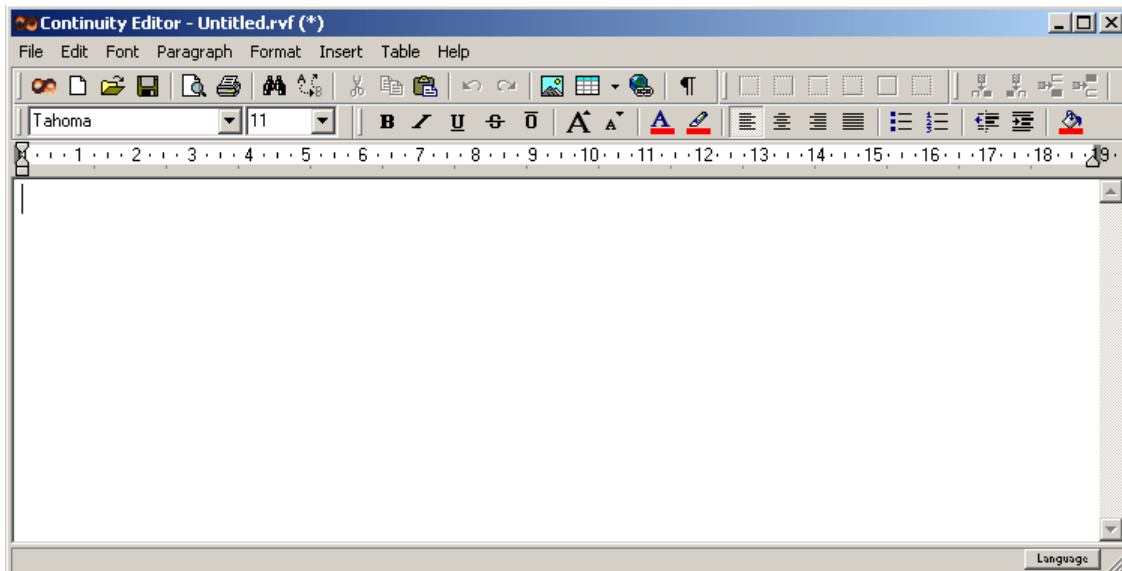
There is an additional icon: in the top left corner which brings up the **Lobby** of Continuity. This is handy for logging on to Continuity to post a document that you've written working offline. It comes with its own file format, **Continuity Rich View Files (RVF)**, that is to be loaded in Continuity using the 'Open...' option. It is also possible to export documents to other formats such as Rich Text Format (RTF).

Client: Lobby

Login/Logout

Login

As you open the client you will see the lobby (below) that requests your username/ID and your password in order to log in.
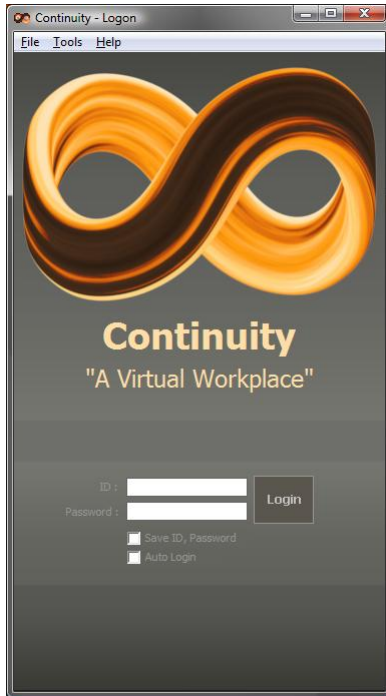
Once entered simply click the Login button to log in to Continuity.

By leaving the tick-box **Save Password** ticked, you will not have to re-enter your ID and password each time you open the client to log in to Continuity but simply click the Login button.

By leaving the tick-box **Auto Login** ticked, you will automatically be logged in every time you run the client.

Logout

The File drop down menu has two options for when you wish to log out: Logout; and Exit.
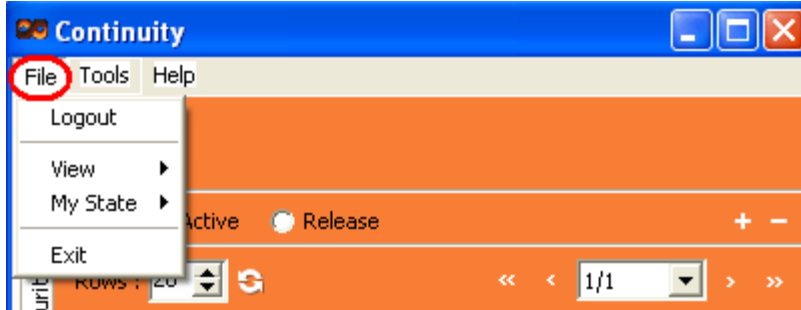
Logout logs you out from Continuity but returns to the Lobby for new login and retains the icon in your screen toolbar...

...for easy right-click access:

Exit logs out and closes Continuity completely.

Messenger

This is Continuity's instant messaging.

The user can create, rename, and delete organizational groups, by right-clicking in the chat list to bring up the menu. "Production" is an example of such a group. Below the groups are expanded to enable you to view all users that belong to each group. If the groups are collapsed, you can expand them by double-clicking on the directory name, and vice versa to collapse them if they are expanded.

Once a group has been added the user can add new contacts to it by right-clicking in the chat list to bring up the menu. The same right-click menu can be used to remove contacts from the list.
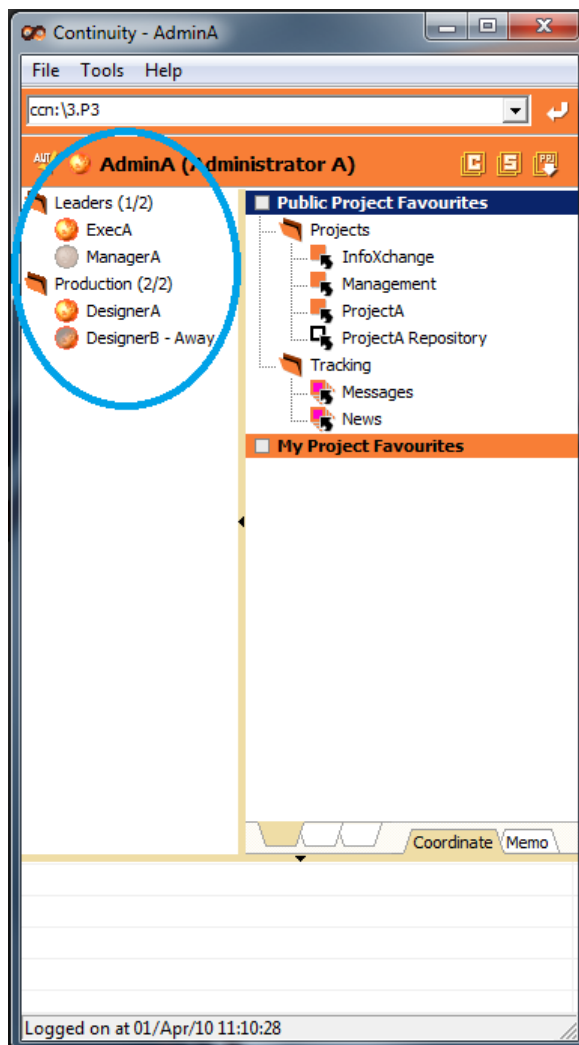
Chat Status/Availability

To set your status, available or away - go to the File-menu and choose the desired status.
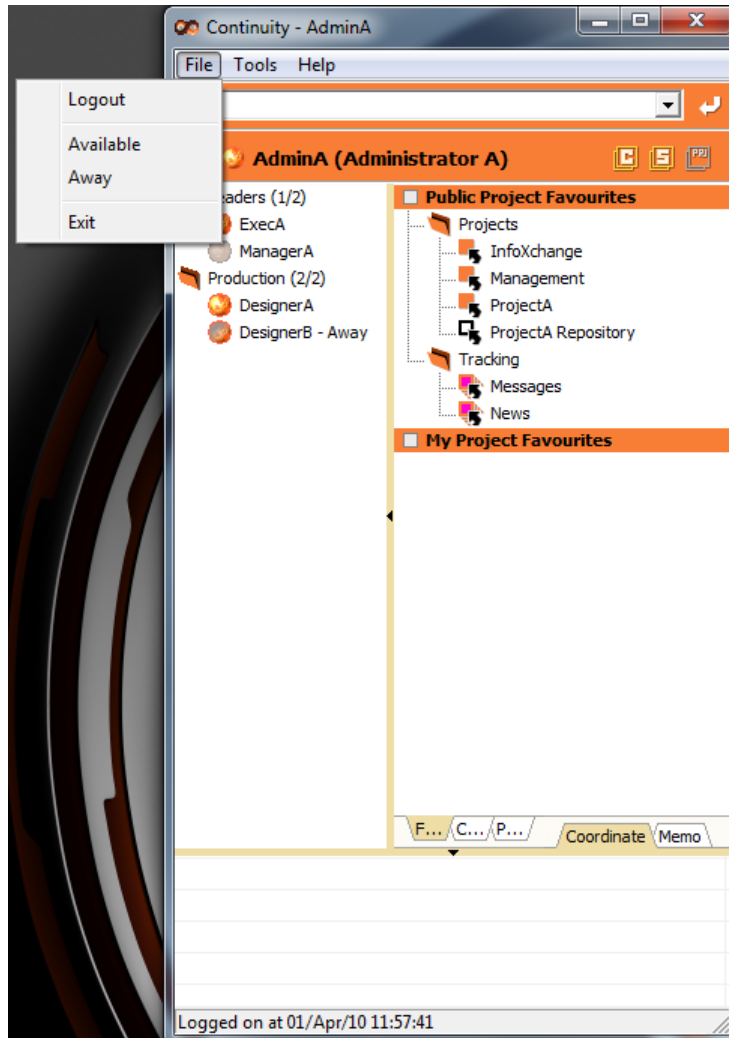
Available: The Available status selection, means you are available to chat. When you log into Continuity your status automatically shows as Available. The globe beside the ID/User name will appear orange: 🔴.

Away: This status means you are away from your workstation or unavailable. The globe beside the ID/User name will appear as orange and gray. While the status is set as Away, other users can continue to send chat messages to you, and you can also reply to these messages. The user can manually set the status to Away, or it will automatically be set to Away when the workstation has been idle for a specified amount of time. To change the default amount of minutes, use Tools/Options (see below): 🔴.

<u>Logout/Exit</u>: When the user has logged out/exited from Continuity the globe beside their ID/User name is solid gray. No one can communicate via chat when the status is set at either "Logout" or "Exit": .

Sending a Chat Message

To send a chat message, simply double-click on the user's ID/name you'd like to send a message to. To send to multiple people, select all of them and right-click then choose Send. Or to add one or more users to an open conversation, select them in the list and drag and drop them to the top left of the conversation window where all participating users are listed.

A conversation window will pop up. Type your message into the lower half of the screen, where the cursor is flashing and hit "Send". You can also use the "Enter/Return" key on your keyboard to send your message.

In the example shown below, "ExecA" has sent "DesignerB" a chat message. On the right hand screen the globe for "ExecA" fades continuously from orange to pink on "DesignerB's" chat screen (which indicates a new communication has been received for "DesignerB"), until "DesignerB" has opened the message and read it.
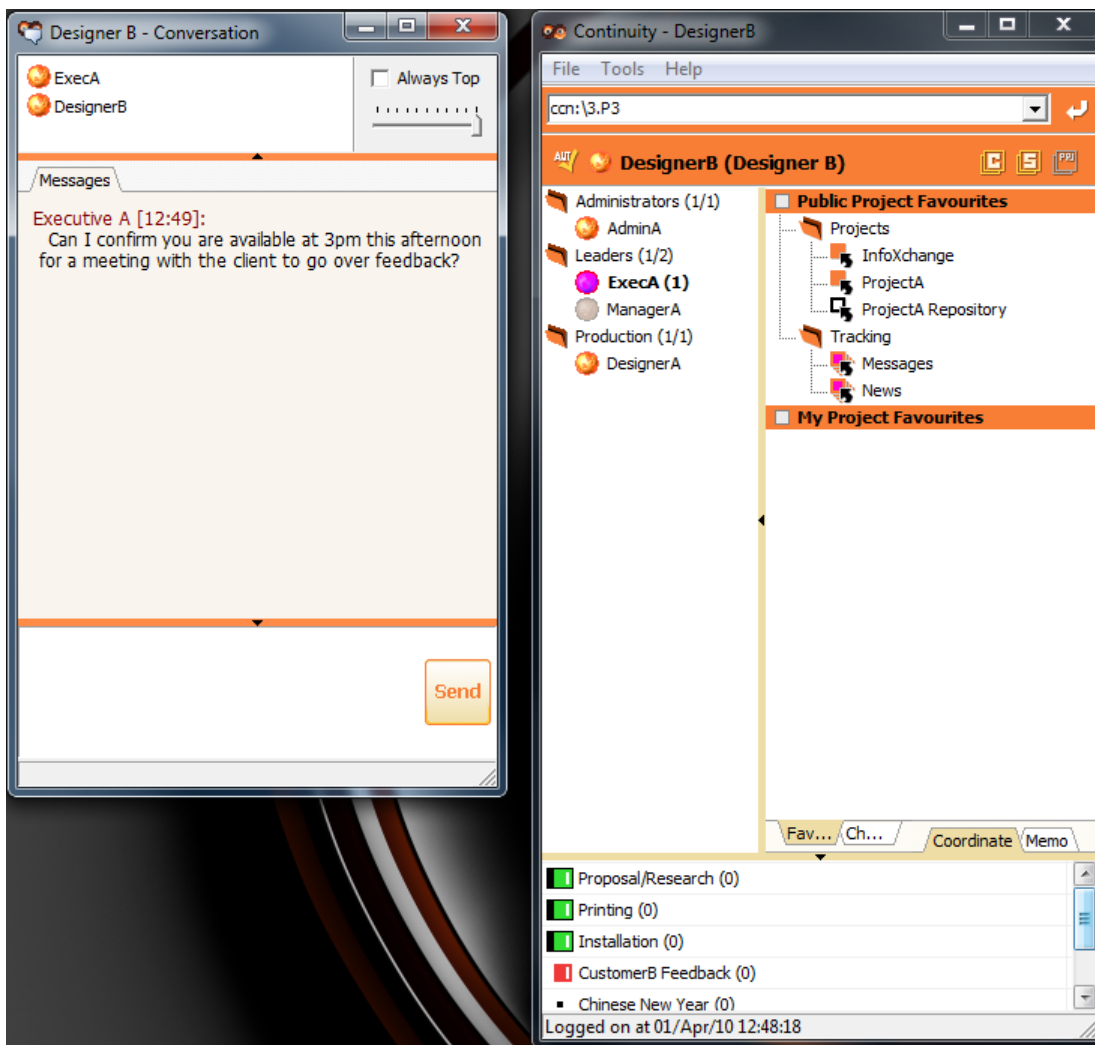
Replying to a Chat Message

Type your reply into the lower half of the screen, where the cursor is flashing, and either use the "Send" button (shown circled below in blue), or the "Enter/Return" key on your keyboard to send your message.

The senders ID/User name, along with the time the message was sent, will appear in Red above the message content, and the recipient/respondents ID/User name will always appear, with the time the message was sent, in Blue.
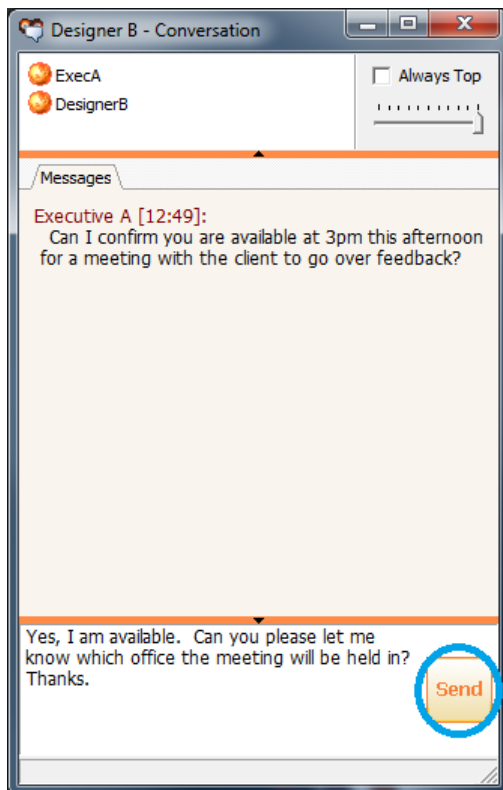
Favourites

Favourites allows for adding and bookmarking projects or parts of projects, similar to any web-browser's bookmarks or favourites.

Notification of Changes

Unlike web-browser's personal links, with Favourites in Continuity you can also track changes that have occurred to any containers and their sub-containers that you are monitoring. If any other user makes any changes to these containers a notification will appear in the Lobby.

This way, the Lobby serves as the Continuity User's central "hub". You do not need to open different Projects to see if there's anything new, but you can instantly check if there are any notifications. The client automatically checks the server for changes every twenty minutes, but you can additionally check it manually whenever you like. To do so, right-click in the Favourite field and choose '**Check Changes**' in the drop down menu that appears.

The notifications also work as direct links, so double-clicking one of them will take you straight to that particular container.

Public Project Favourites

The Public Project Favourites are set up and defined by the administrator on the server.
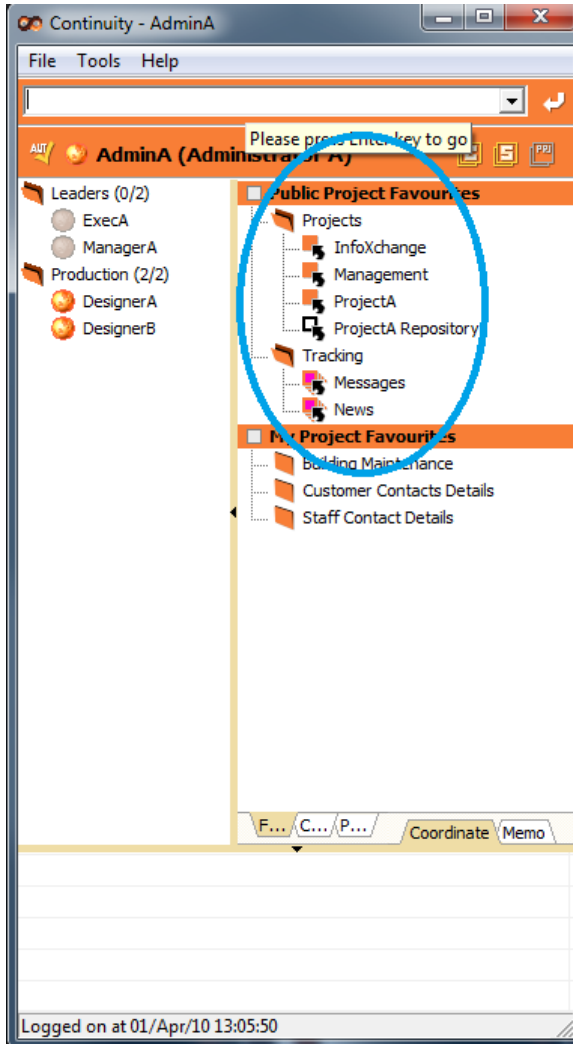
My Project Favourites

These favourites can be freely set up by the user on the client side.
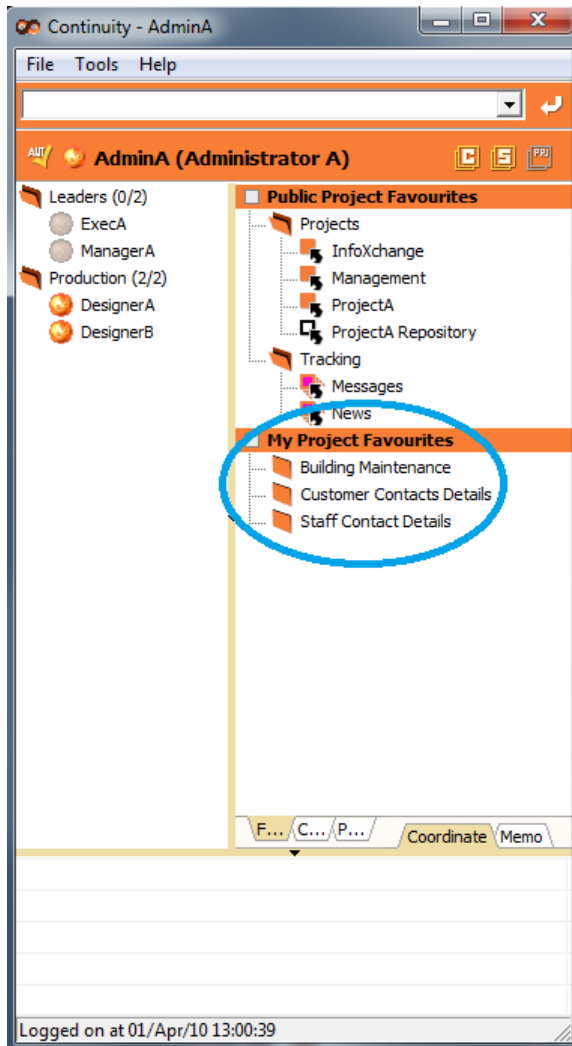
Add New Group

To add a new favourite, you first need to create a group. To do so, right-click in the My Project Favourites area and select **New Group**.
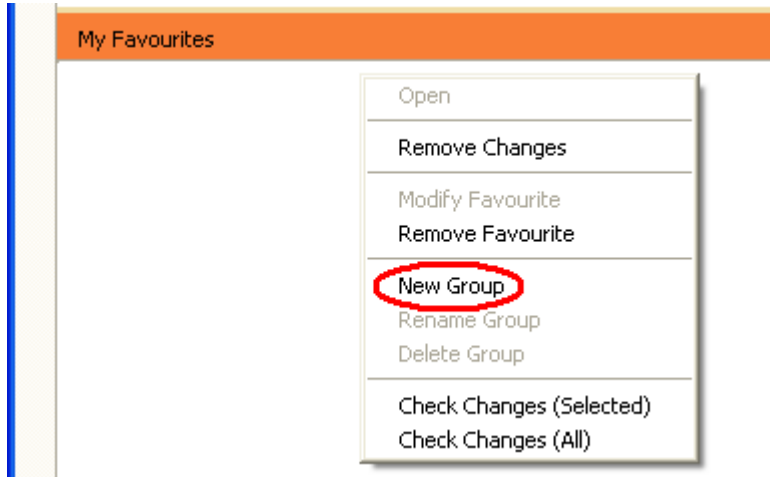
A window appears.
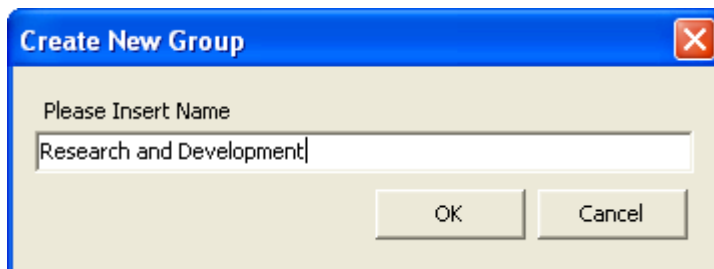
Give the group a name. Choose **OK** and the group's name appears under My Project Favourites.

Add Favourite

Now open the project or repository location where your favourite container or directory exists. From the tree or directory structure, simply drag and drop the container or directory across to a group in My Project Favourites.
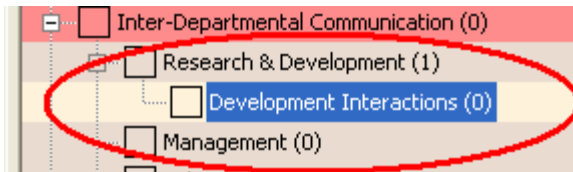
As you drop it a window will let you rename the favourite.

If your favourite is a container in the tree, this window will also let you choose to be "notified of changes within seven days". Select this if you want to track changes made to this container. Then another box will ask you if you want to be notified *of sub-containers* any changes over the last seven days - if you do then tick this as well.
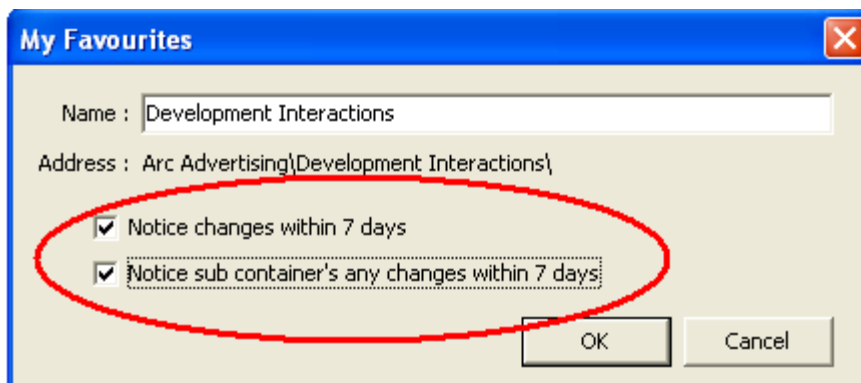
Once you click OK, the new favourite will appear in My Project Favourites.
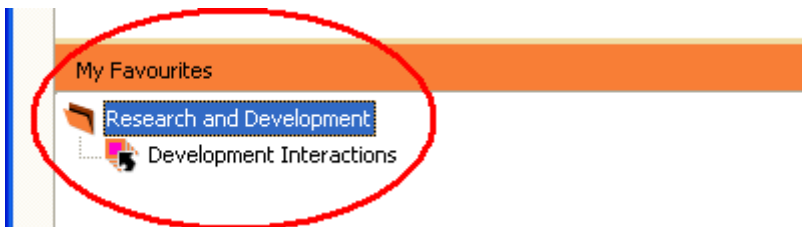
Container changes are monitored every twenty minutes. Whenever there is a change a small pale orange box will appear bottom right of your computer screen, with the name of the folder and the time.

The changes will then be listed in My Project Favourites on the Lobby. To go straight to the relevant container simply double-click on its name.

Modify Link

If you want to make any changes to a link in My Project Favourites - select it, right-click and choose Modify Link.
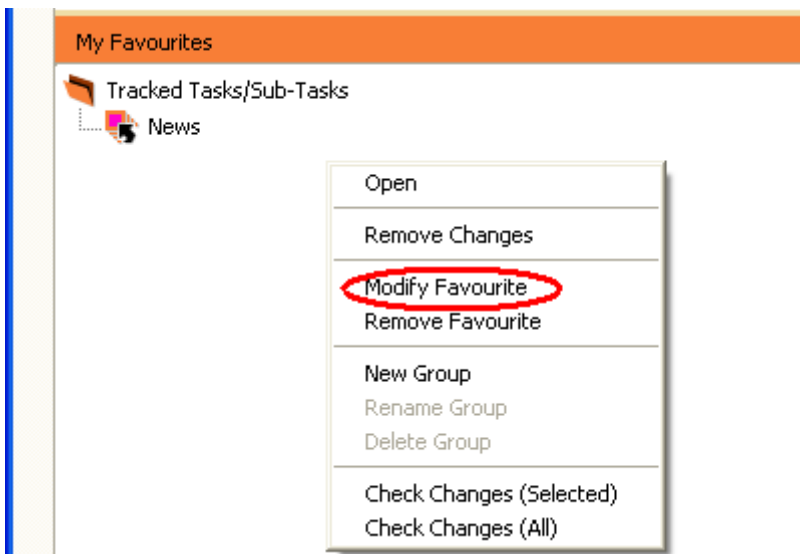
A window will appear where you can change the name of the link and the selection for notification criteria.
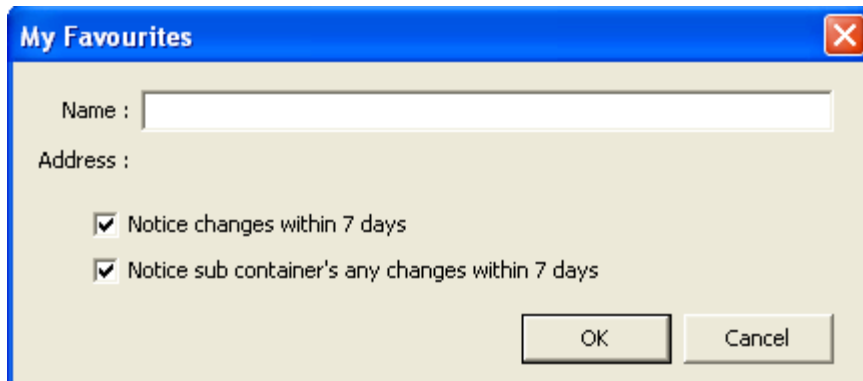
If you check the tick-box 'Notice changes within 7 days', a notification will appear on the Lobby when changes have been made to this container.

If you check the tick-box 'Notice sub container's any changes within 7 days', a notification will appear on the Lobby when changes has been made to this Task or its sub-Tasks.

When you are happy with your changes hit OK.

Delete Link

If you no longer wish to keep a particular favourite, select/multiselect it/them, right-click and select Delete Link.
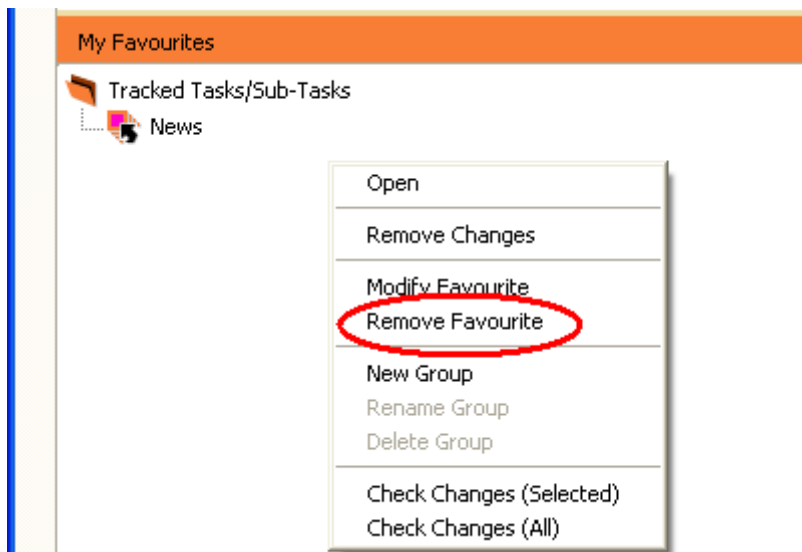
This window will appear. Choose Yes and the Favourite will be removed.
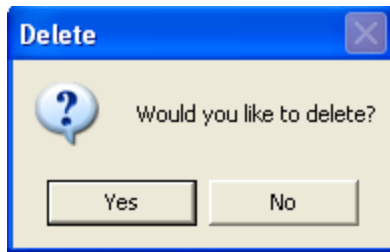
Rename Group

If you want to make changes to a group in Favourites - select it, right-click and choose Modify Group. A window will appear where you can change the name of it. Press OK to confirm the new name.

Delete Group

If you no longer wish to keep a particular group, select/multiselect it/them, right-click and select Delete Group and the group(s) will be removed from this preset.

Check Changes

If you want to check Favourites have changed without having to wait for notification, right-click on the name and select Check Changes.
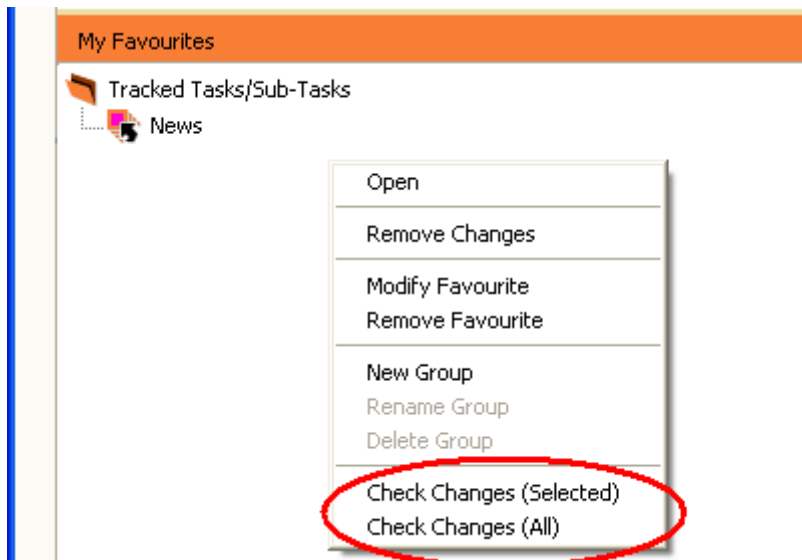
Changes History

As soon as you have viewed a change, it will disappear from the favourites tab and be listed under the changes history tab.

Delete Changes

The changes listed under changes history will automatically be removed at next logon. If you manually want to remove them from the changes history list select/highlight the relevant change(s) and pick Delete from the drop-down menu.

Coordinate Preview

Coordinate Preview lists the top containers that are assigned to you in the Coordinate View. By default the top fifty containers are displayed, if you wish to change this number use the Alert window as part of Options accessed thru the Tools-menu.
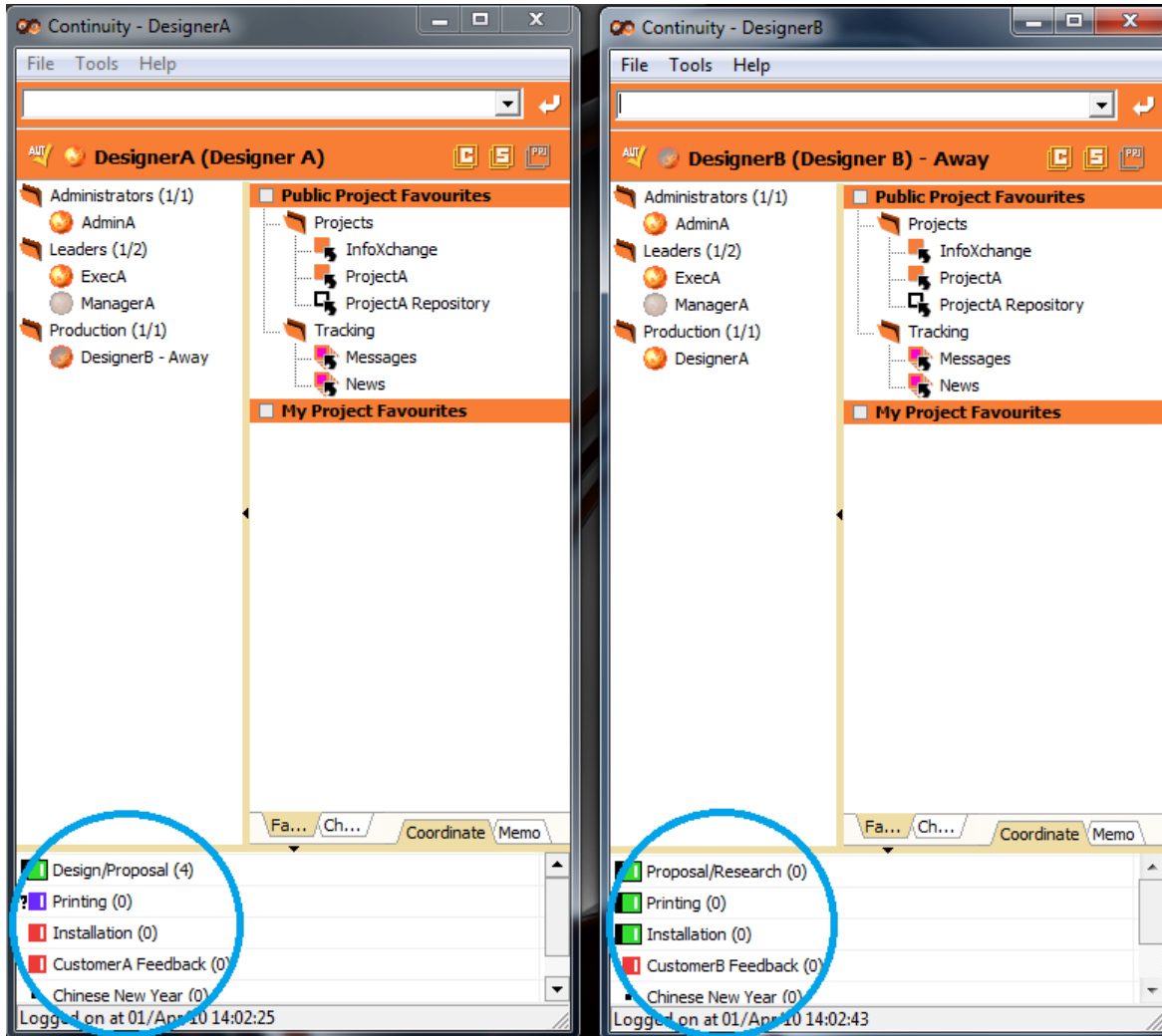
Containers marked with an exclamation point icon: ⓘ indicate that they are close to their due date. A pink pop up **notification** will appear on logon to inform the user how many of their active containers - tasks - are **close to** their **due date**.

Due Date Notification ✕

Your 99 container(s) is/are
close to due date.

Please check coordinate view.

16:56:52
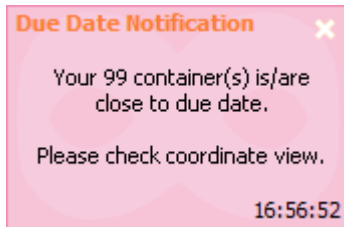
This option needs to be enabled by the administrator on the server console, where the amount of days before a notification appears is also defined.

Memos

The right-hand tab on the Lobby is the 'Memos' tab. This handy function allows you to Add and Organize Memos on the Lobby as a handy 'to do' list or a reminder to yourself for appointments etc.

Create a Memo

To create a Memo, simply right-click in the blank lined Memo area and select "New'".

| Favourites | Changes Hi... | | Coordinate | Memo |

New
Delete

Open
Close

Restore Size
Minimize

Move Up
Move Down

Reload
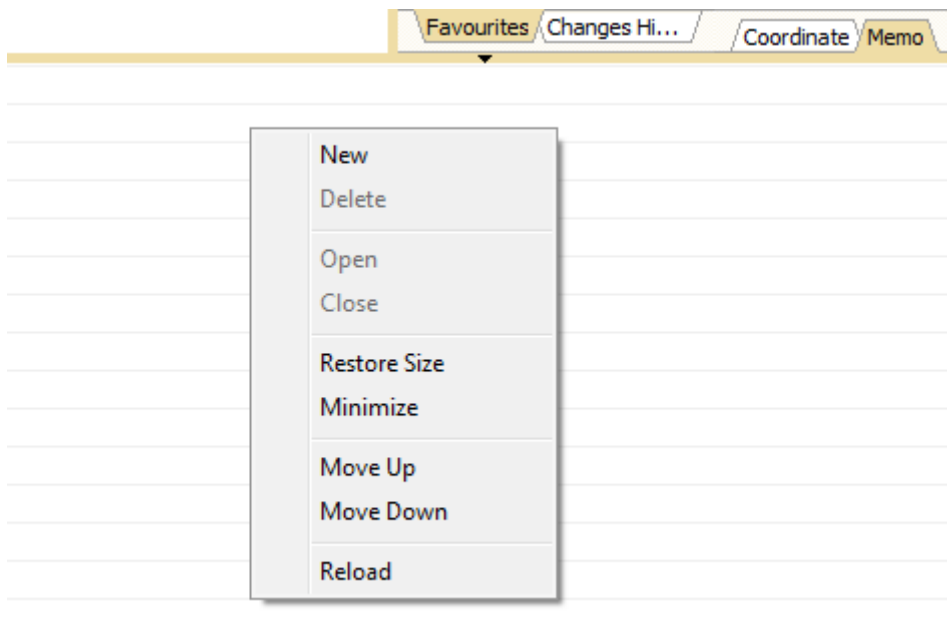
A Memo Window like the one in the screenshot below will appear. Enter your note/reminder and hit the Save button at the bottom left of the Memo block or use your Ctrl+S keys. Your memo will appear at the top of the list.
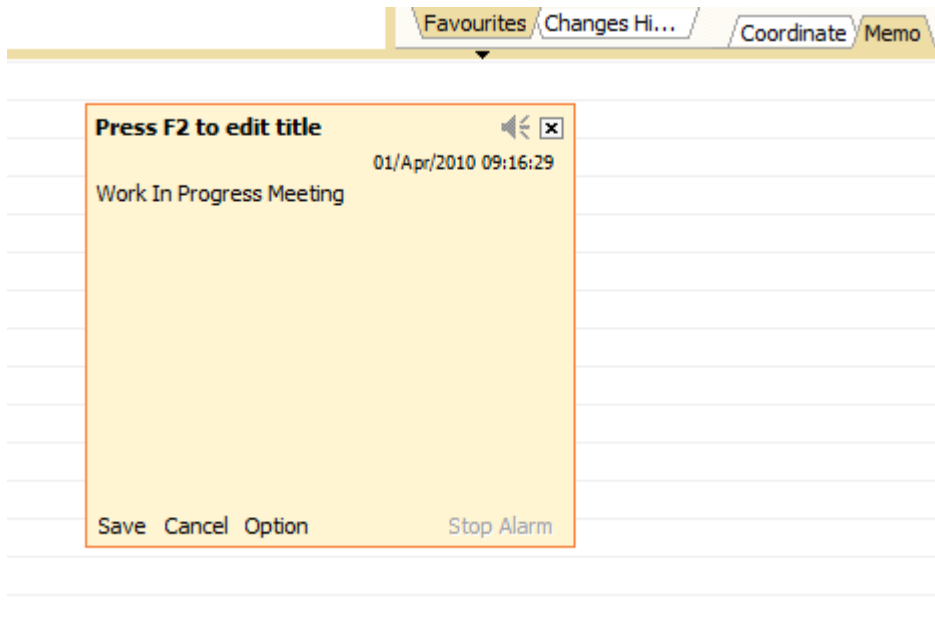
Memo Options

Before saving a memo, if you wish to use any of its options - click 'Option' at the bottom left...
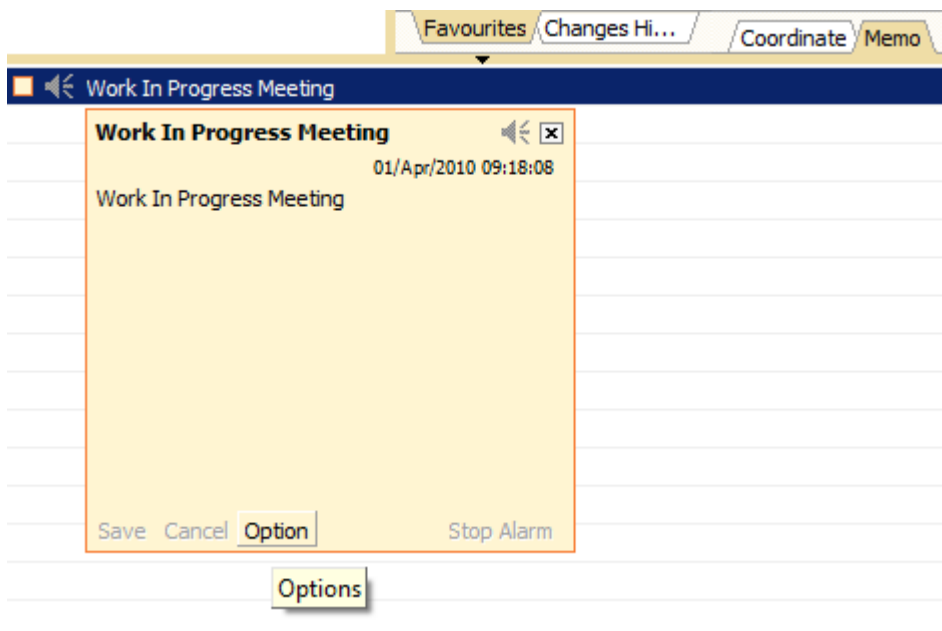
...and the below box will pop up.
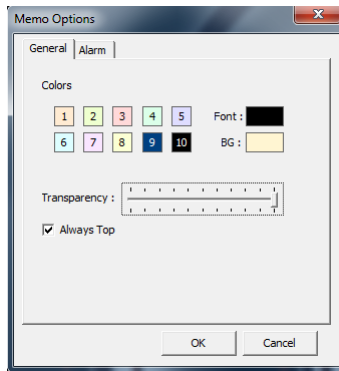
<u>General</u>: You can use the General tab to choose the color of your Memo (useful for distinguishing quickly between different kinds of Memos!); the amount of transparency and whether you want it to be always on top of other windows.
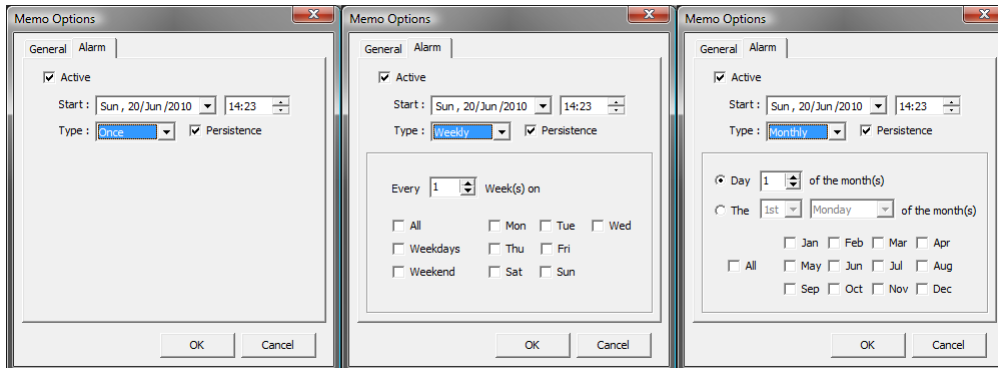
<u>Alarm</u>: Under this tab, you can set the Memo Alarm and the time you would like to be reminded. By default the **Persistence** option is checked. This means that if you are not be logged on to Continuity at the time of your alarm, it will go off at your next logon. To disable this option, simply untick the Persistence check-box.

If the event occurs more than **Once**, you can use the drop-down arrow to select varying occurrences, **Weekly** or **Monthly**.

When you are happy with your choices click 'OK' and then '**Save**' the very bottom left of the Memo itself. The saved Memo will appear at the top of the window.

Open/Close Memo(s)

Double-click the Memo you wish to open in the list and this Memo opens. Alternatively or especially if you want to open more than one memo, multi-select the relevant ones in the list, right-click and choose "Open" in the menu that appears.

To close an open Memo, click the top-right close icon marked with an 'x'. Alternatively or especially if you want to close more than one memo, multi-select the relevant ones in the list, right-click and choose "Close" in the menu that appears.

Resize Memo(s)

Memos can be manually resized by using the mouse, hovering above its border until an arrow appears and pull it to the desired size. To quickly minimize your Memo, double-click its title. Double-click the title again to restore its size. Alternatively, select the memos you wish to resize and use the menu options in the right-click menu: "Restore Size" / "Minimize".

Move Memo(s)

To reorder memos in the list, select the memo you wish to move, drag it to a destination memo and choose among them options in the menu that appear: move up or move down.

Alternatively, select one memo you wish to move, right-click to bring up the menu and choose move up or move down. The memo will be moved accordingly in the list - up or down.

Delete Memo(s)

To delete a Memo, first select the Memo (or Memo's by multi-selecting) you wish to delete by clicking on it. It will become highlighted in dark blue, then right-click. Select the Delete option.

You will be asked to confirm whether you wish to delete the Memo with a Yes or No option, like the one pictured below.
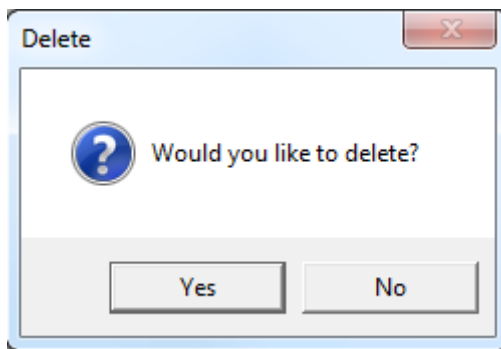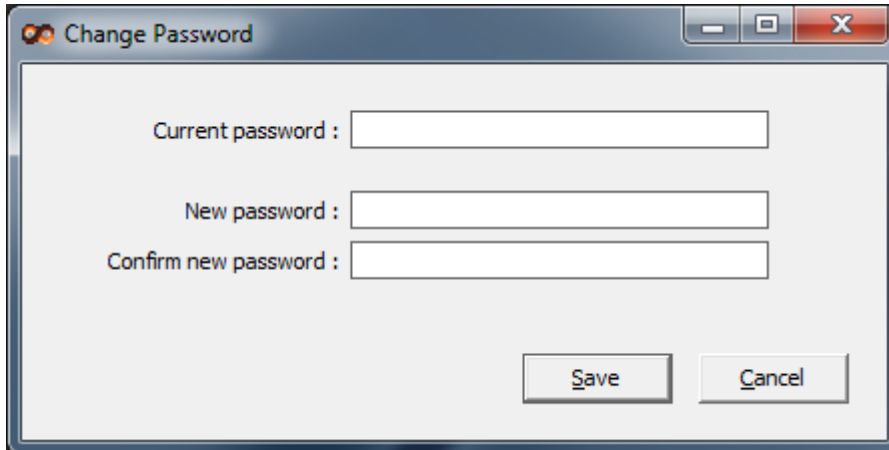
Tools-Menu

The Tools drop-down menu has four options: **Change Password**; **Regist Key**; **Regist Colors** and **Options**.
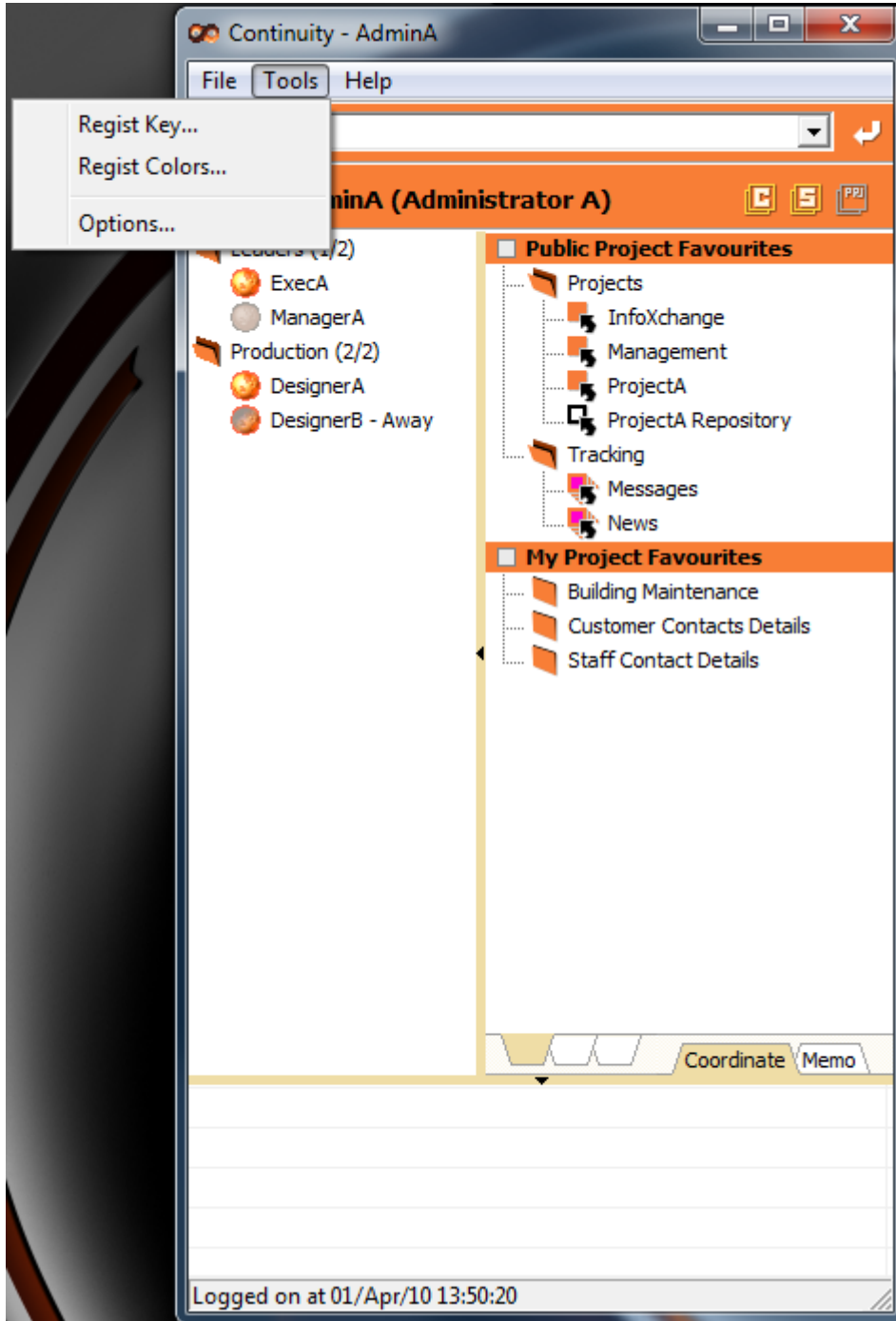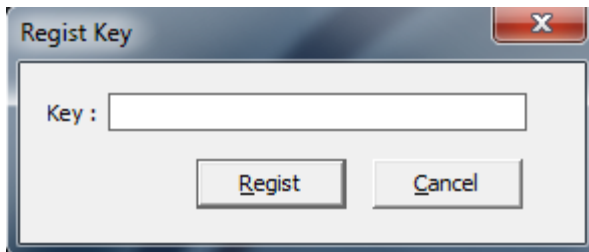
Change Password

To change your password, simply enter your Current password in the first box, followed by your New password in the box below. You will also need to Confirm you new password in the last box as pictured below.

Regist Key

If your permissions require, the Administrator will provide you with a Continuity Key number. Enter this number into the pop up window and click on "Regist" to confirm.

Regist Colors

You can select both Font and Background Colors. Once you have selected your color scheme, click OK to confirm. These will be your default colors for any logs that you post in Continuity so that different authors can be easily distinguished.
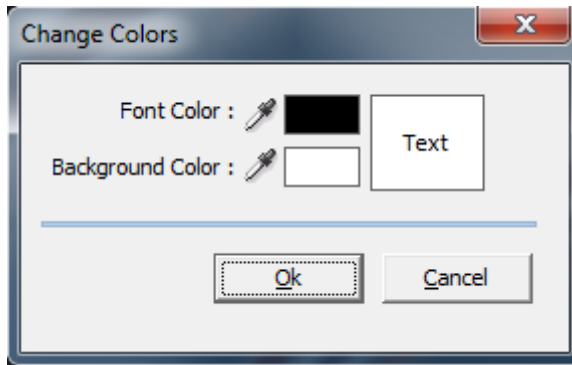
Note: Here there's a really nifty 'color picker'. Put your cursor over the little eye-dropper to the left of 'Background Color' or 'Font Color' and with the left mouse key depressed drag it over the screen. You will see the color change as it passes over what is already there - whether in Continuity or not!

Options

General
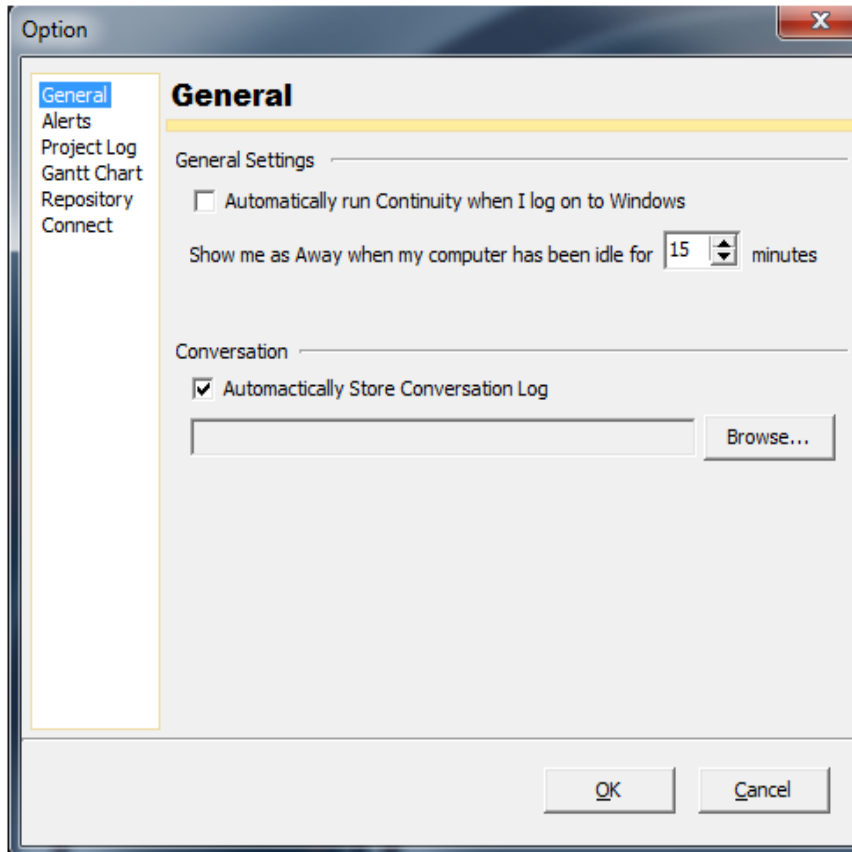
This lets you configure a number of general settings for Continuity.

If you wish Continuity to automatically run when you log on to Windows, tick this check-box. This in combination with the Lobby's Auto Login option, will log you on to Continuity automatically every time you log on to Windows.

If you want to change the amount of minutes before your status is shown as Away when your workstation has been idle for a specified amount of time, enter a new amount of minutes between one and sixty.

You can here also select a location for storing chat logs – or disable this option.

Alerts
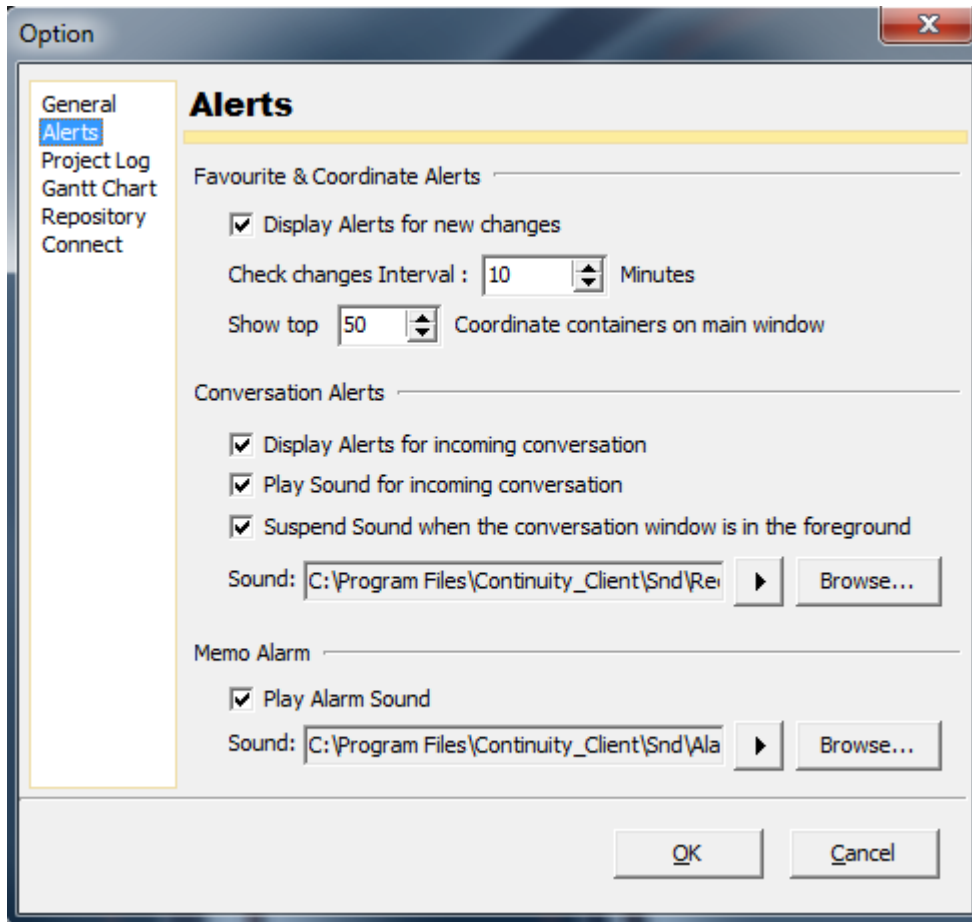
Opens a window where you, under **Favourite & Coordinate Alerts** let's you disable pop-up **notifications** that inform you about changes that have been made for the Favourites that you have set. Unchecked tick-box disables these alerts, checked box enables these alerts. If you choose to display alerts, you can here also choose how often your Continuity client should check for new changes with the server. Every twenty minutes is default; every ten minutes is the most frequent time interval possible.

By default the top fifty containers are displayed in your **Coordinate Preview** field in the Lobby. If you find that this turns into a too large list, or that there are containers missing that you would like to view in your Coordinate Preview field, this number can here be changed here to that of your choice.

Under **Conversation Alerts**, you can also disable pop-up **notifications** that inform you about instant messages sent from other users. Unchecked tick-box disables these alerts, checked box enables these alerts. The next check-box let's you disable the **sound** for when you receive such a message – or keep it ticked to hear the sound when you receive a message. By default the sound is suspended when the conversation window is in the foreground on your screen, as you would not need to be aurally notified then. If you wish to play the sound also in this event, untick this check-box. If you wish to playback another sound file than the one shipped with Continuity, you can browse for a wav-file on your system and so set this up here too.

The last check-box, under **Memo Alarm**, let's you disable the **sound** for when an alarm of one of your personal memos goes off – or keep it ticked to hear the sound. Just like with conversation alerts, if you wish to playback another sound file, you can browse for a wav-file on your system and so set this up for memo alarms too.

Project Log
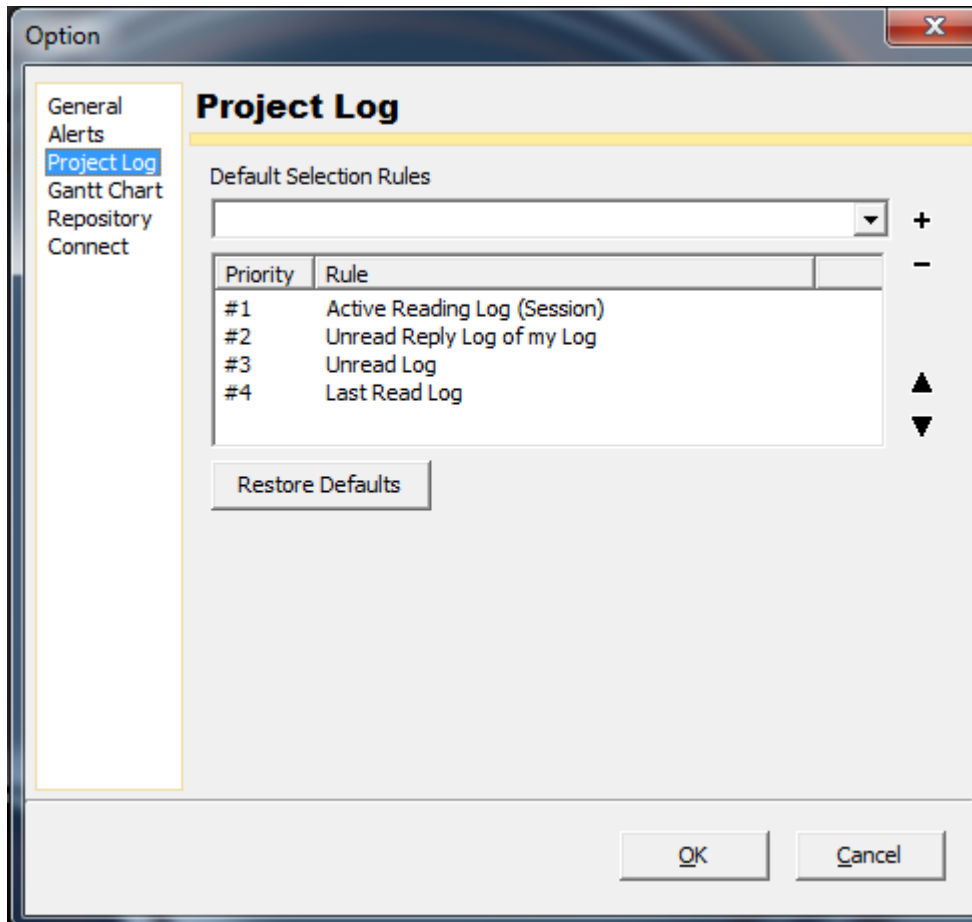
These options let you decide what log is selected for display when accessing a container. There are four different selection rules:

Active Reading Log (Session): when you view logs of a specific container more than once during one session, this rule will select the log that you last read when you viewed the container's logs the previous time during the same session.
Unread Reply Log of my Log: selects a reply to one of your logs from another user that you have not yet read.
Unread Log: selects a log that you have not yet read.
Last Read Log: selects the log that you last read regardless of session.

You can delete rules that you do not want to be applied by selecting it in the list and hitting the '-' icon. If you would like to add a rule again that you've removed this way, select it in the drop down box and click the '+' icon. You can reorder them in the list to prioritize selection rules by using the arrow icons up and down with the first listed rule having first priority. To go back to the default settings (displayed in the screenshot above), simply click the 'Restore Defaults' button.

Gantt chart
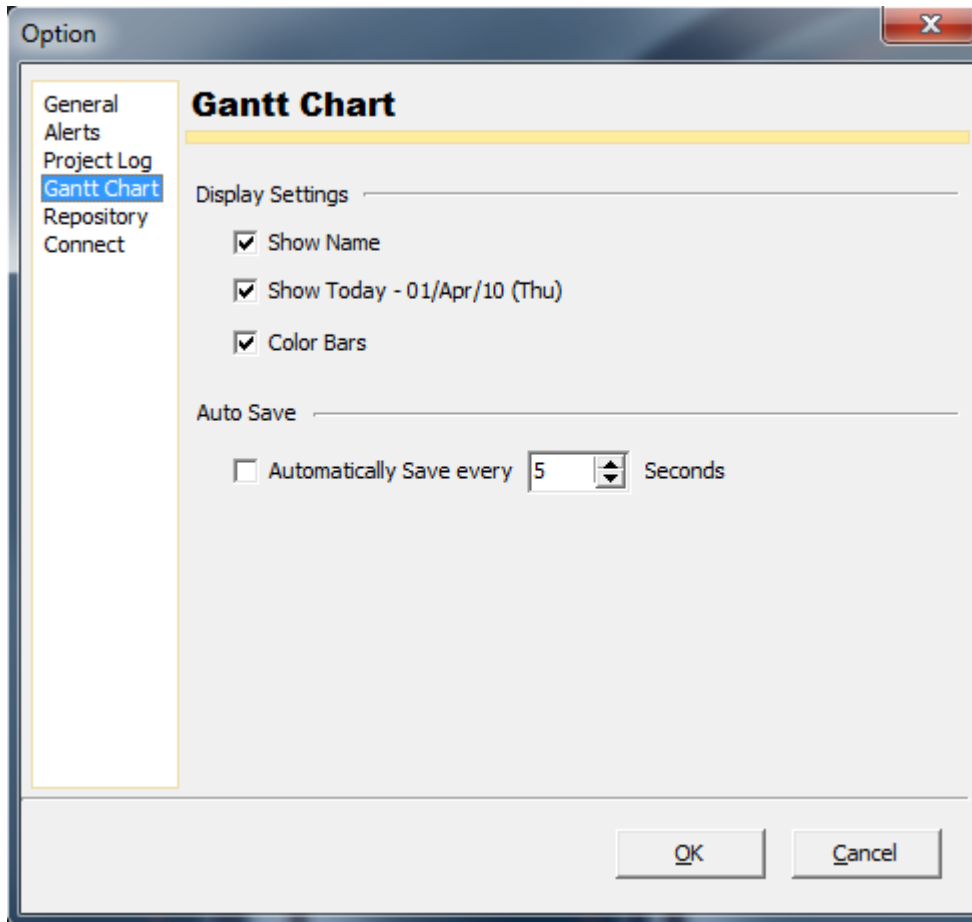
The Gantt chart's **Display Settings** can be configured here. If you do not want the name or the color bars to be displayed, they can be disabled by unticking the relevant check-boxes. And as you can see, there is also a tick-box where the user can toggle between showing and hiding the vertical today-line.

The **Auto**matic **Save** function for the Gantt chart can also be configured here. If you want to upload changes manually, untick this checkbox. Or if you want to change the time interval for auto saving, this can be done here too by entering the desired amount of seconds.

Repository
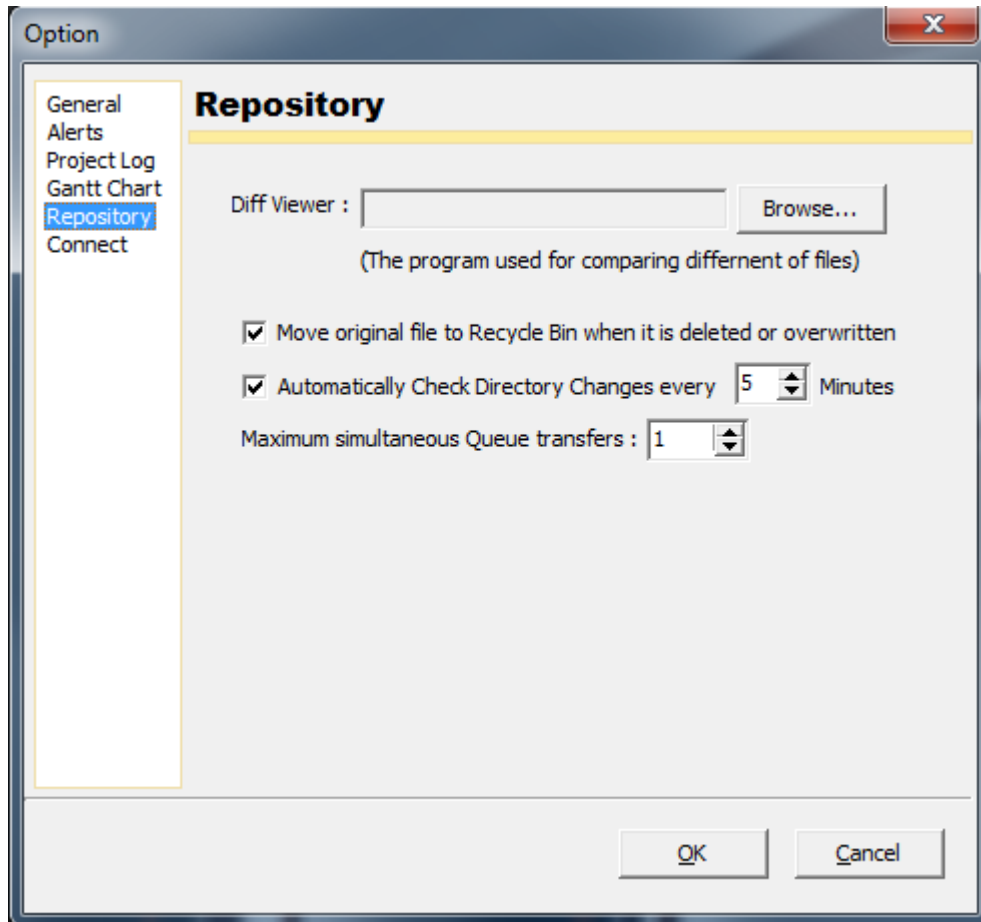
The repository options include the option to link the repository with a **diff viewer**; a program used for comparing text files' differences. This is very useful for programmers who want to compare different script or code files. A file can then be downloaded to a temporary directory and compared with the previous local file to quickly decide what version the user wants to keep.

The handy default option the **move files to** the **recycling bin** when deleted or overwritten can be disabled here.

The interval of automatic **directory reloads** can be changed here too.

For users on slow connections, the amount of **simultaneous queue transfers** for repository uploads/downloads can be increased to speed up their transfers. On fast connections, however, the default one queue transfer is usually fastest.

Connect
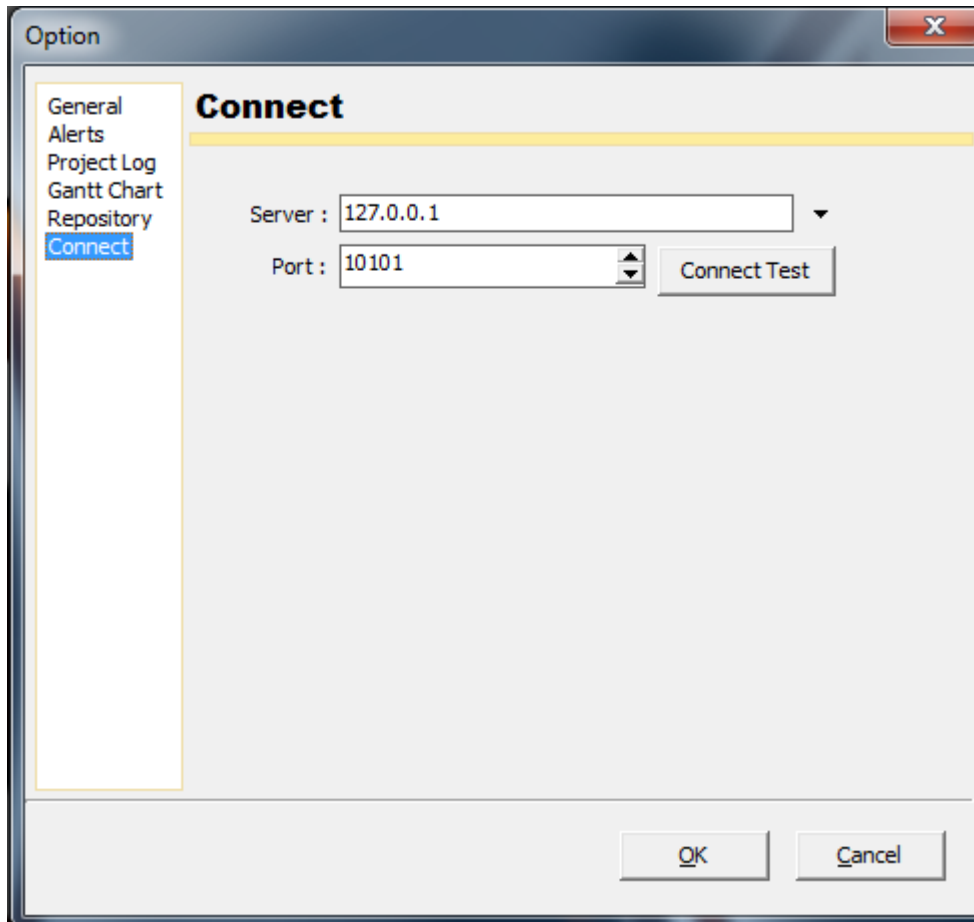
Lets you change your **server** and **port** settings for the Continuity server that you connect to with your client. You can also test the connection by clicking the 'Connect Test'-button.

Help-Menu

The Help drop down menu has two options: **About** and **Help**.

About

If you select About the following information window appears:
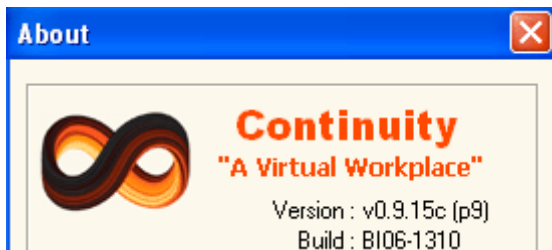
It is useful to find out the **Version** and the **Build** of your current Continuity client.

Help

Not yet available.

Projects

For Users with administrator privileges all the various Projects available are listed.
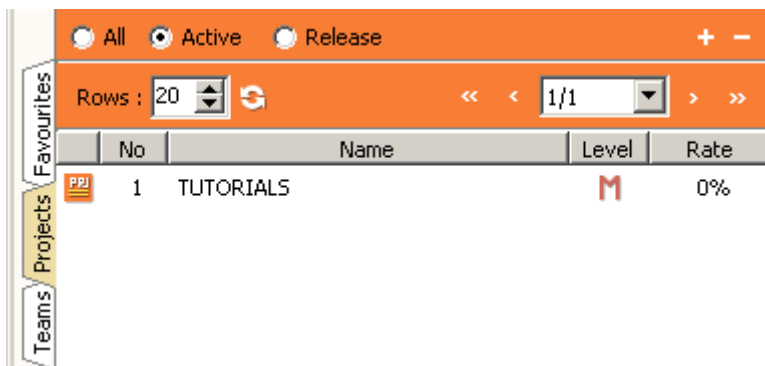
To **Open a Project** double-click on the Project name itself or right-click on the name and choose 'Open' from the menu that appears. The **Tree Window** and the **Viewer Window** of this Project will appear.

The toolbar at the top of the Projects list contain the amount of rows being displayed which you can increase or decrease and the page number currently being displayed:

Add New Project
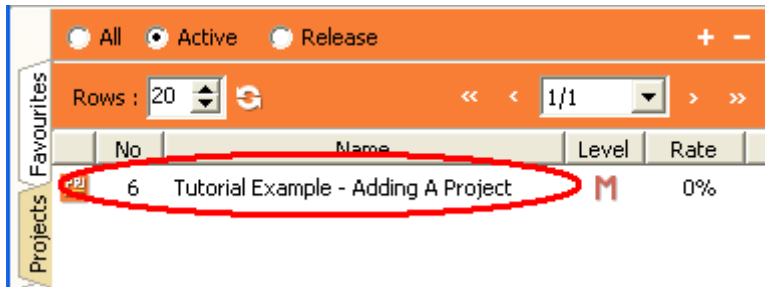
When you have purchased Continuity then this will be blank - as you will be adding your own Projects. To add a new project right-click in the project list and select **New** in the menu that appears. There are two types of projects: **Main Projects** and **Child Projects**. Child projects are to group a number of large, topically related projects together under one Main Project; they share the same repositories for example – if you wish to be able to access the same repository from a number of similar projects.

A window will appear with some empty fields to complete:

The properties that you can set up for your new project are identical to those offered when creating a new container (see 'Add New Container' under the Tree Window's Project View section).

When you are happy with your choices pick 'OK'. In the Lobby the Project you have added will appear at the top of the list.

Modify Project

Modifying/editing of project properties takes place in the **Tree Window** - this opens when you double-click on the Project Name in the Lobby.

Once in the Tree Window, select the Project container and right-click. A drop down menu will appear.
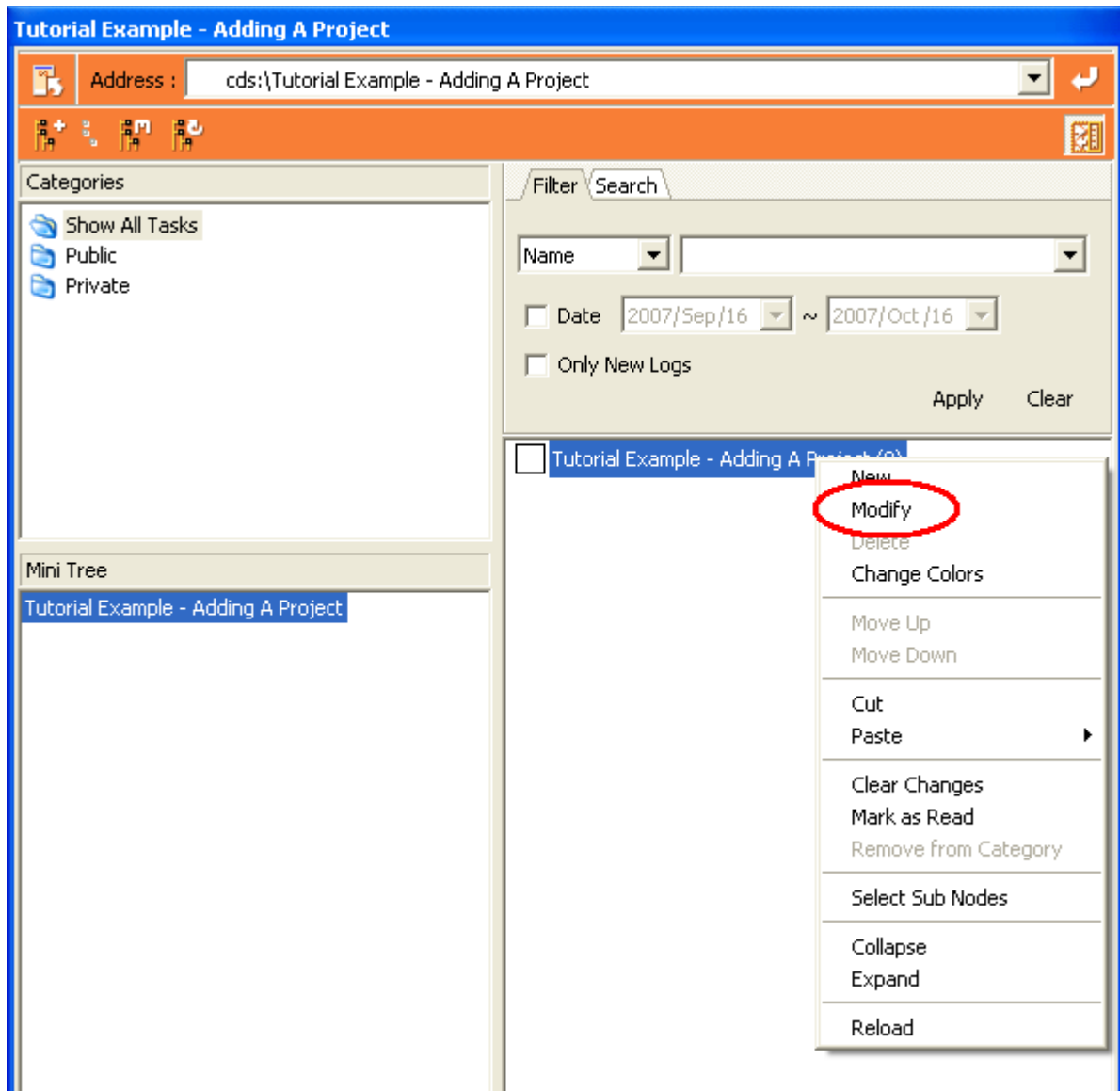
Select **Modify**.

The Modify Project Box will pop up and lets you modify any of its properties.

Client: Tree Window

The Tree

The Tree in the right hand side of the **Tree Window** (the Tree) allows you to view the Project View, the Coordinate View or the Search View as a hierarchy. To different extents, you are also able to modify these hierarchies in different ways.

Every entry in the tree makes up a **Task**. As you click on any Task its Logs, Gantt chart, time line or other content becomes visible in the **Viewer Window**.
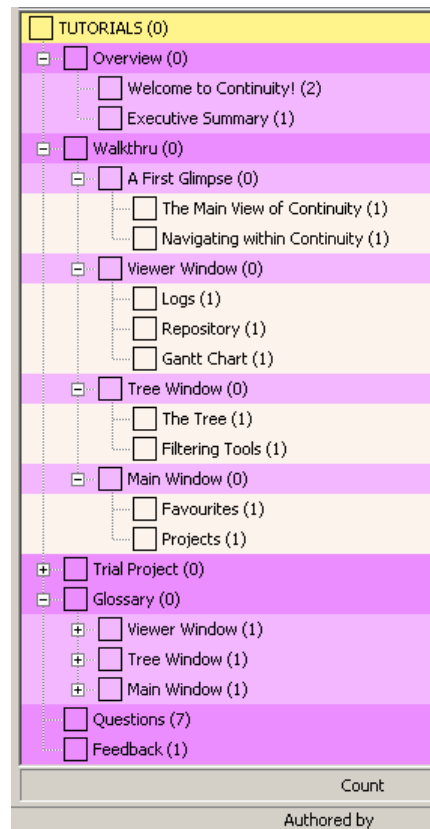
Hide/Unhide the Tree Window

If you have one monitor you can display one window at a time, in case you want to view them in full screen mode.

If you choose the full screen option you will need to use **F12** as a shortcut key to hide/unhide the Tree Window on top/behind the Viewer Window and then toggle between the two.

Filtering Tools

There are three tools that make it easier to view and work with the Tree: **Search**; **Mini Tree** and **Categories** – of which some exist in all Tree Window Views (Project, Coordinate and Search) and some only in a few of them.

These tools can be used independently or in combination with each other. Each filters the content in a different way that limits the Tree's display.

Mini-Tree

In the Project View and Search View there is the Mini-Tree.
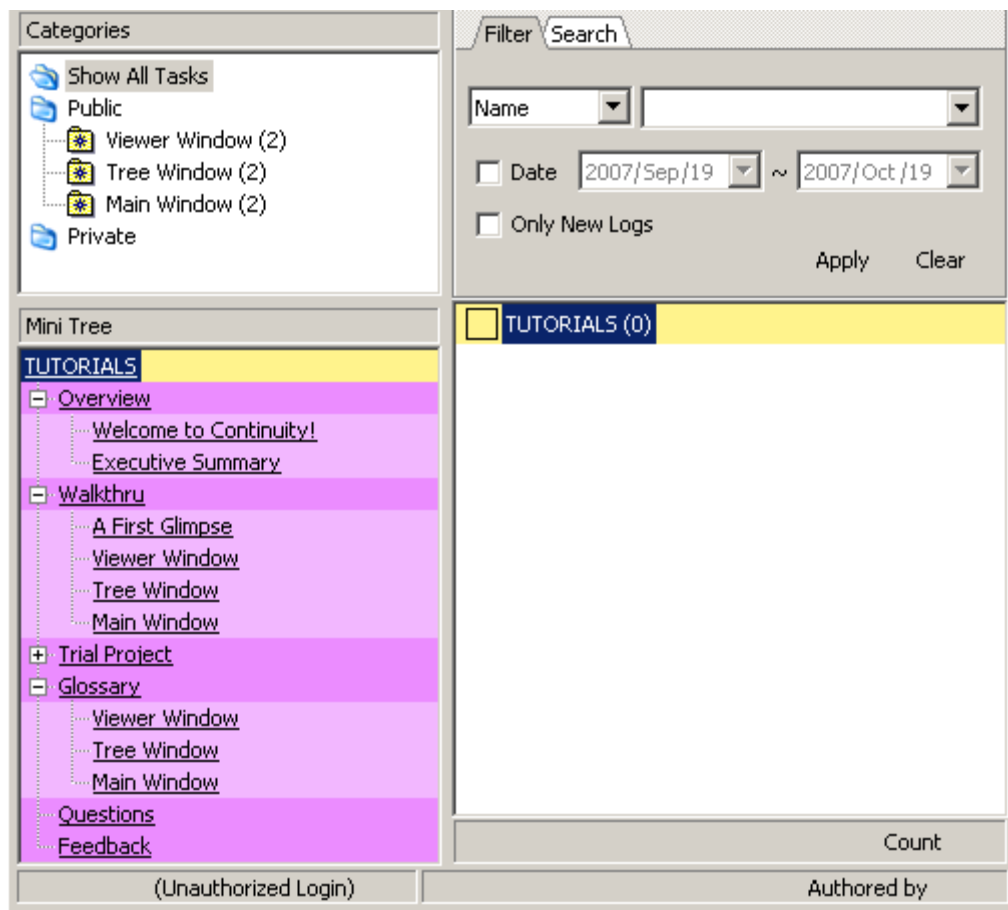
By clicking one of the Tasks in the Mini Tree, only its sub-Tasks will be displayed in the Tree. To get to another part of the Project instantly just click another Task in the Mini Tree.

By clicking the top Task ('TUTORIALS' in the example above), everything in the Project that you have access to will be displayed - as long as the Filter Tree is not

collapsed as above. To **expand** the Tree simply double-click on the Project name).

While the Mini-Tree in the Search View is dynamically determined by the Users search criteria, in the Project View the administrating User can drag the most important Tasks and drop them in the Mini Tree to the very left to set it up for all Users.

Search

At the top right of the Tree Window, directly above the Tree in all views (Project, Coordinate and Search) is the **Search** function indicated below circled in blue. It allows you to filter your view of the Tree by searching for a Task/Container by several different parameters.
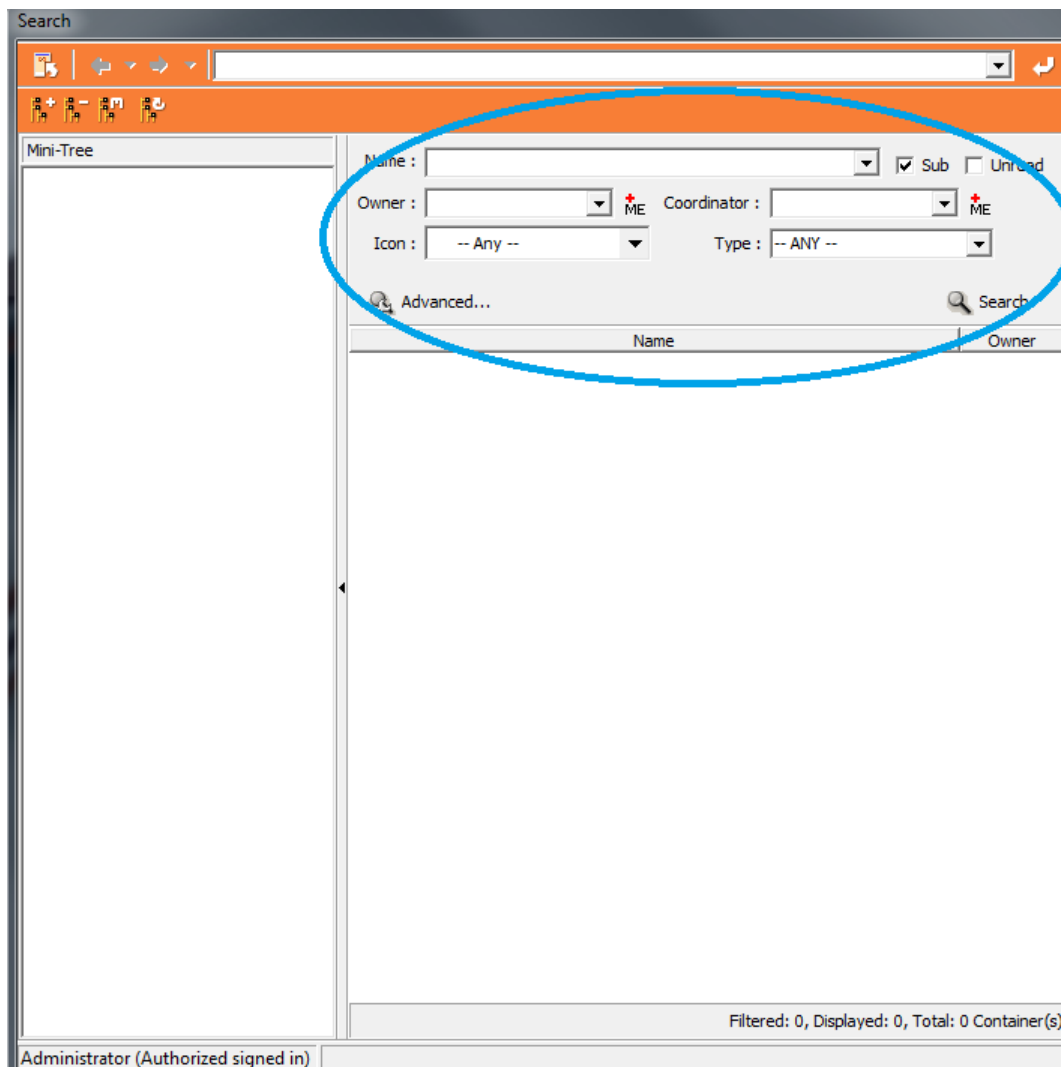
Enter the parameters you want to use to filter out/retain certain Tasks by choosing typing a name, owner, coordinator; picking an icon or.

The other tick-box next to these fields is **Unread**. If you tick this box, only the Logs that have been added since you last checked will appear. This is extremely useful for checking up on new additions without having to work your way through a large list.

Shown below is the drop down option for searching by Icon.
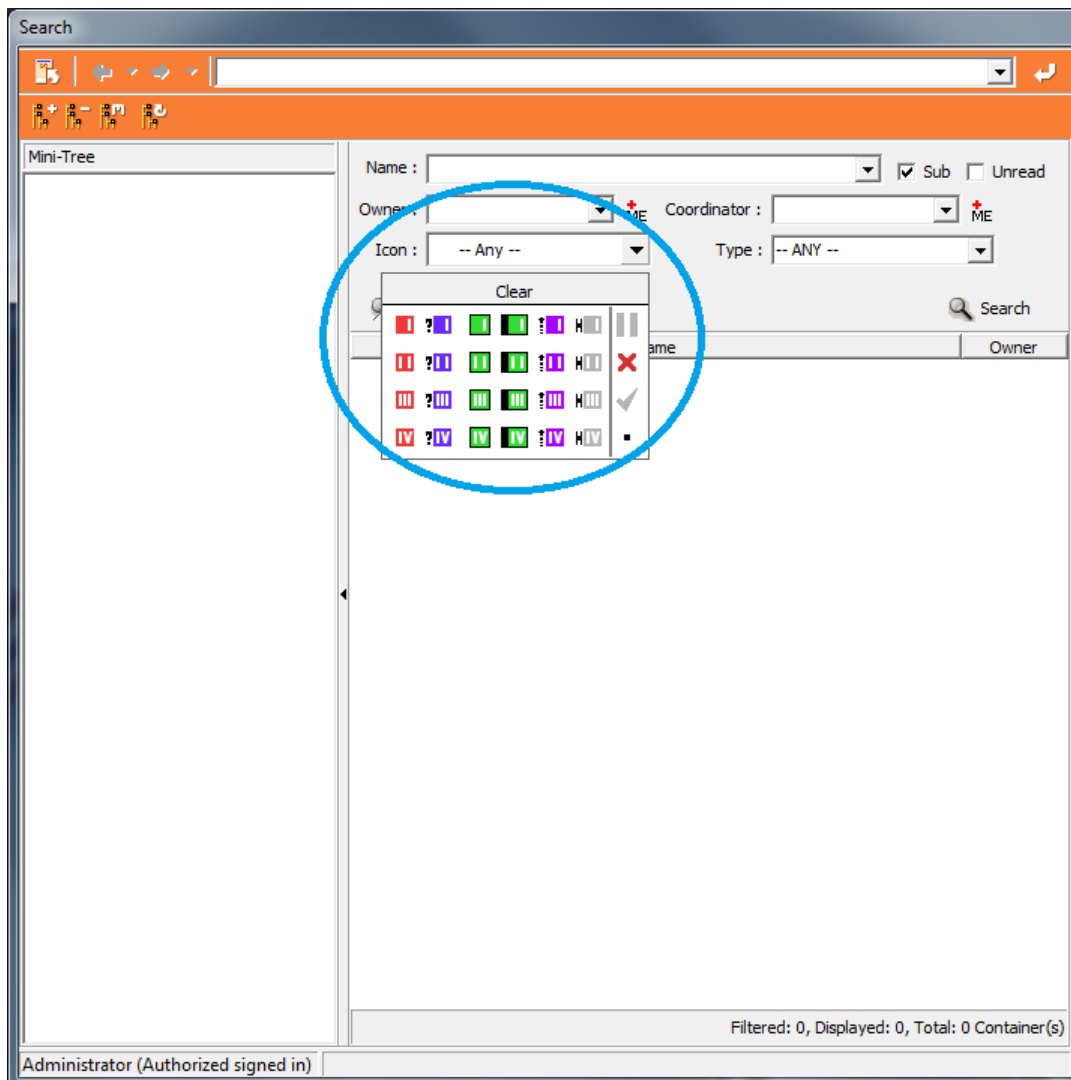
Once you have selected your search options, click **Apply**/**Search**.

For this example, we chose to search by the To-Do Icon. After selecting the Search icon to initiate the search, the results will be displayed as shown below.
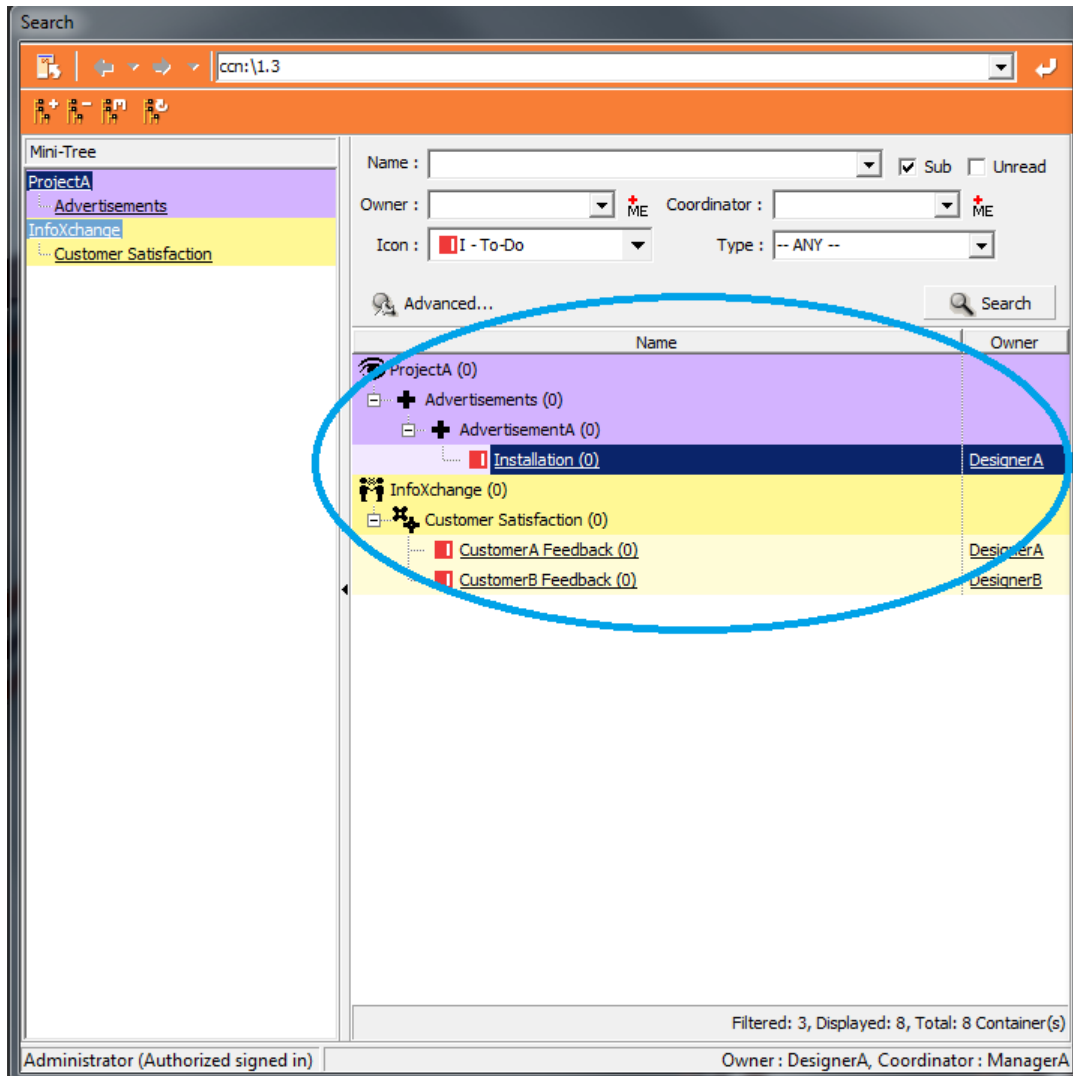
Advanced Search: If you want to narrow down your search criteria even further, you can use the Advanced Search option. To launch the Advanced Search, simply click on the icon circled in blue below at the bottom left of the Search panel.
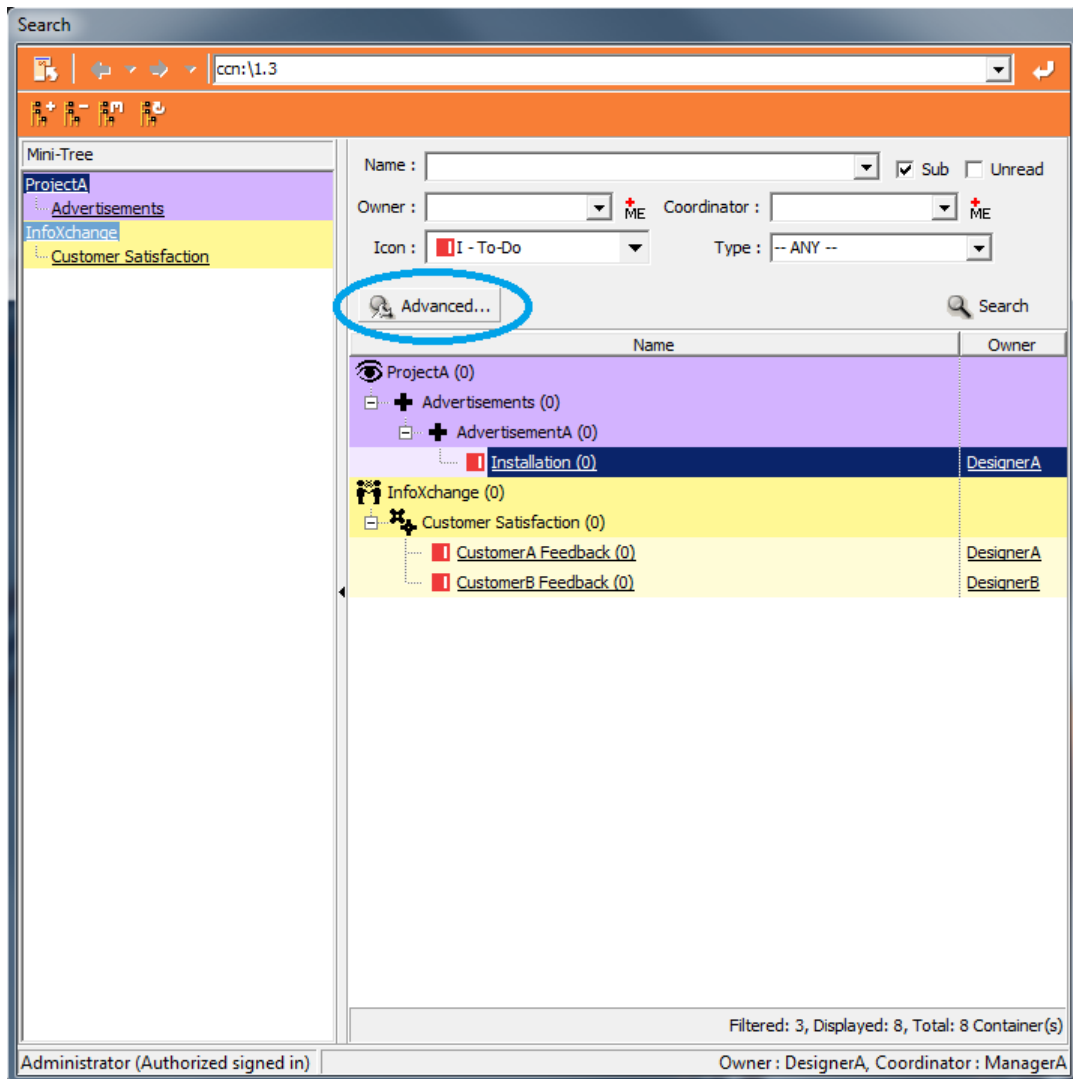
The below pop up window will appear. Select from the many different options which search criteria you require and click OK to initiate your search.

Your search results will be displayed. From here you can hit the Clear button to start a new search, or the Cancel button to take you back to the main view.

Project View

The Project View Tree Window is divided into four different areas: **Mini Tree**; **Tree**; **Categories** and **Search** - each with its own function.
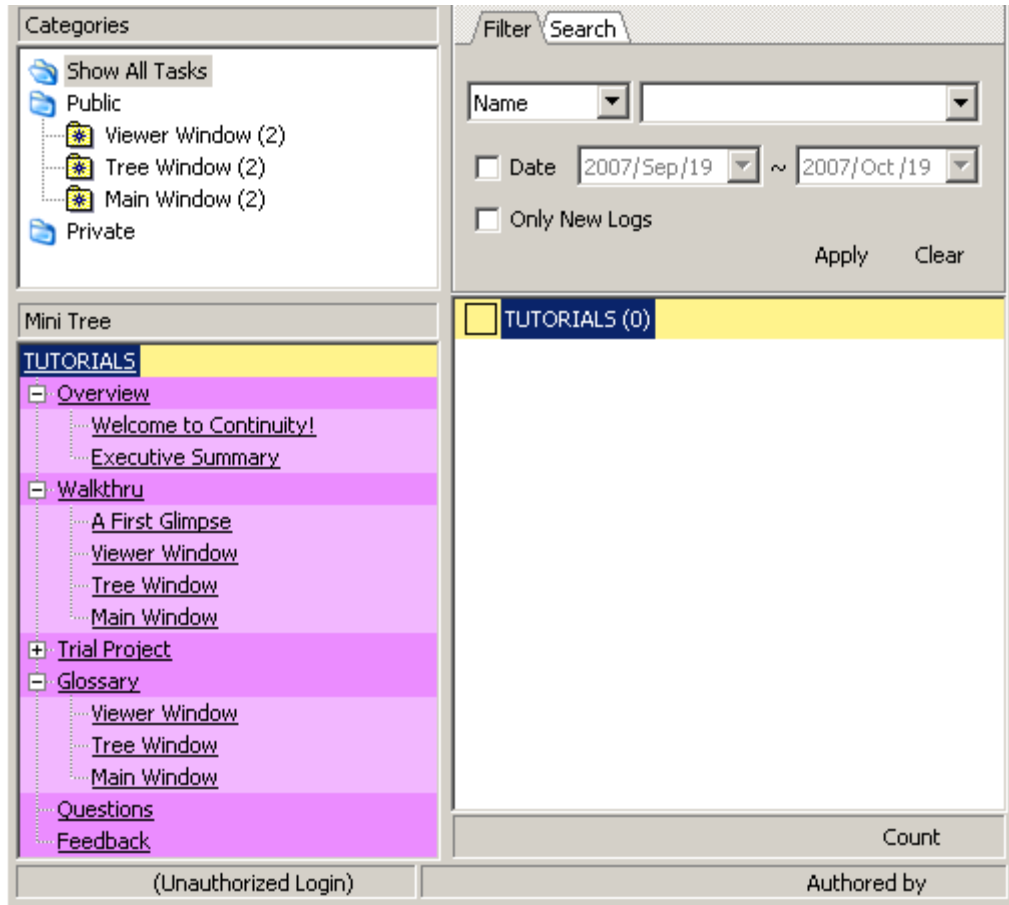
Mini Tree and Tree

The **Mini Tree** (bottom left) is displaying all the Main Tasks (we call them Tasks and/or Containers). Because on large projects there can be a lot of these in the **Tree** (bottom right) - the Mini Tree is set up to display as few or as many as you wish.

Click on any Task/Container title in the Mini Tree (In the example below we have clicked on 'Current Projects') and it appears in the Tree window. Tasks with sub-containers will display these sub-containers as well.

To the right of each Task/Container is a figure inside brackets - this tells you how many Log Entries there are in each Container.
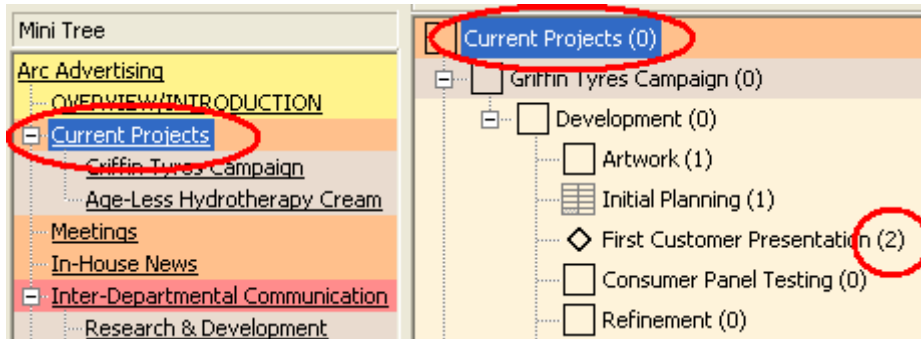
The Mini Tree is not populated automatically, and the reason for this is that the Mini Tree is best used as a brief summary of the Tasks in the Tree - so you can see all your most important Tasks at one glance. Therefore it is up to you to choose what Tasks you want displayed.

To populate the Mini Tree, select the Tasks you want to display in the Mini Tree and simply **drag** them across from the Tree - **and drop** them in place.

In the Example below, for instance, you can see that we have dragged and dropped the Tasks in yellow and purple but not their sub-Tasks (in beige).

Add New Container

To Add a Task/Container to any Project place the cursor over the Task in the Tree list where you want to add a new one and click on the top left New Container icon: . Or right-click in the Tree list and a drop-down menu will appear. Select New.
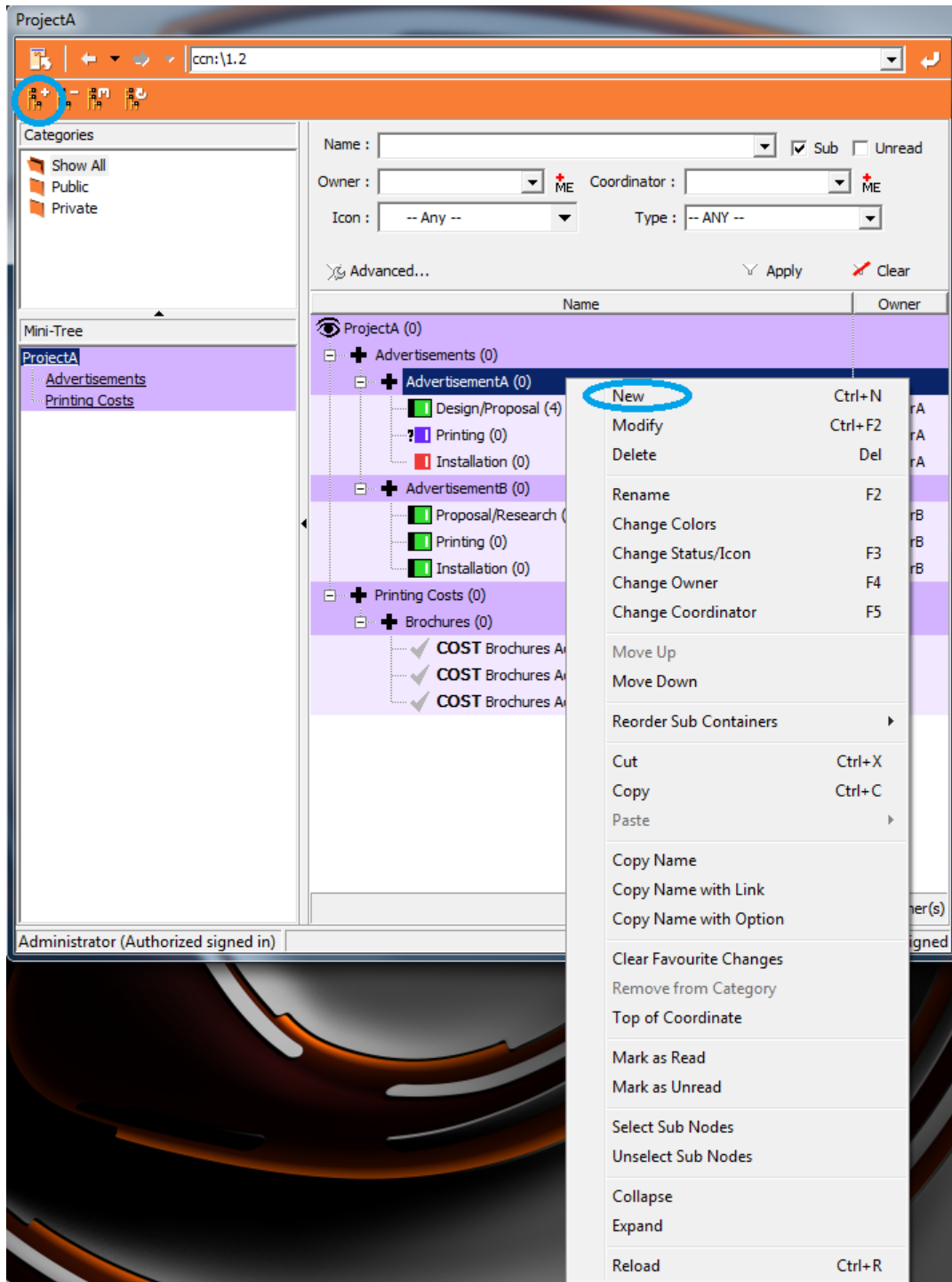
...or press simultaneously shortcut keys **Ctrl**+**N**.

A pop up window, like the one pictured below, will appear. The new window offers many different options and settings.

<u>Name</u>: Type in the name you want to call this container in the box indicated below.

If you click the down-pointing arrow, the name field extends down and allows you to create **multiple** containers in one go. This is also a very handy option if you have a list of some sort that you would like to convert into Continuity containers. You can simply paste a text-list stored in your system's buffer into this field. Each new line in this field will be the name of a new container once you've clicked Ok to confirm.

<u>Icons</u>: You can change the icon status depending on the progress of the container/task. There are two different types of Icons; Status & Supportive.

The **status** icons are a selection of color icons with varying levels of completion depending on the color/priority.
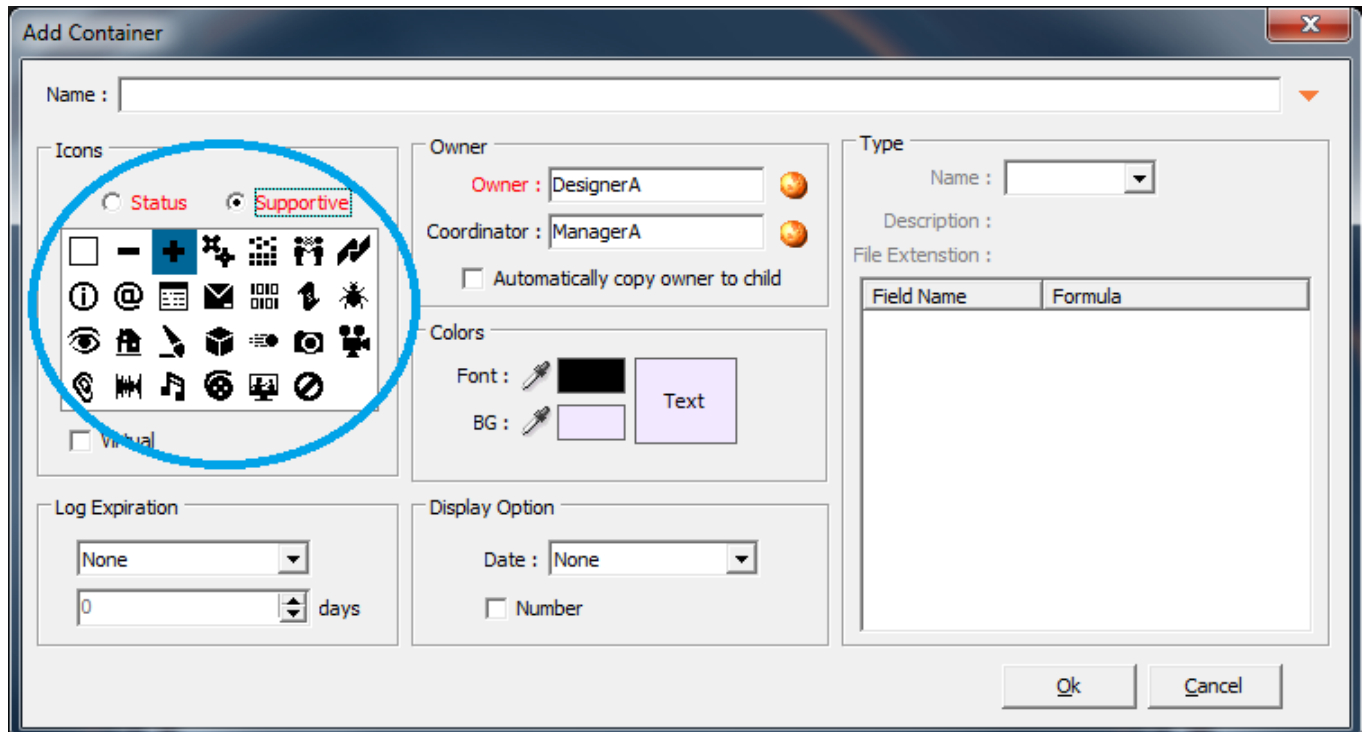
The **supportive** icons are a selection of figurine icons.

<u>Owner</u>: You can change the **Owner** of a container by clicking on the orange globe next to the Users name. A new window will appear giving you all possible Owners for this container. If you do not want to assign an owner, tick the tick-box at the bottom for 'unassigned'.

The same applies for changing the **Coordinator**. Simply click on the orange globe next to their name and select a new Coordinator. . If you do not want to assign a coordinator, tick the tick-box at the bottom for 'unassigned'.

If you check the tick-box 'Automatically copy owner to child', any container later created as a sub-container/child will automatically be assigned to the same owner. Also containers that are moved or pasted as sub-containers/children will automatically get the same owner property copied to them.
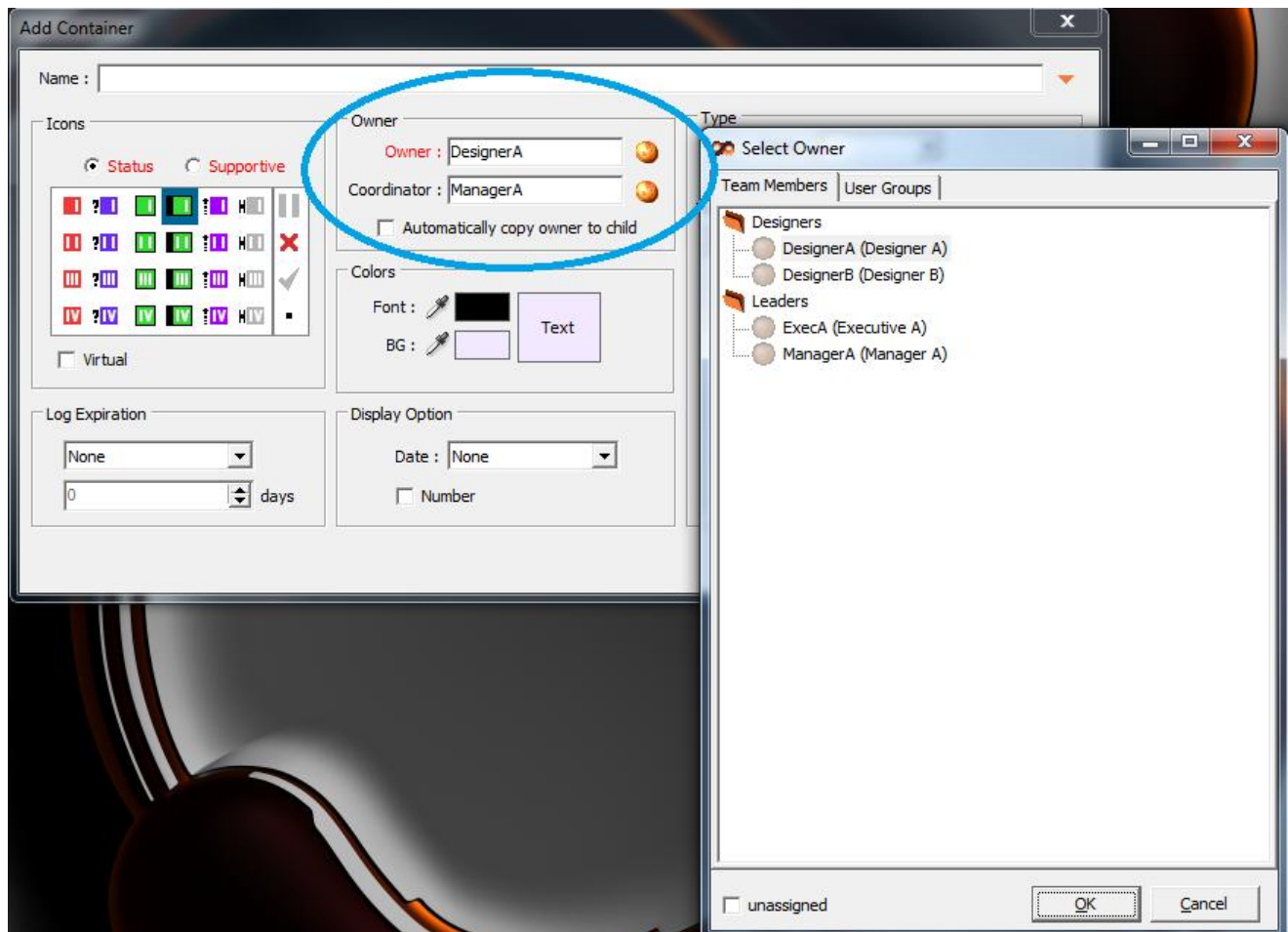
Type: You can choose one of the different container types defined by the administrator on the server to categorize different containers. Click on the drop down arrow to select the container type you require.

<u>Colors</u>: You can select both **Font** and **Background** Colors.

There's a really nifty 'color picker'. Put your cursor over the little eye-dropper to the right of 'Font' or 'BG' and with the left mouse key depressed drag it over the screen. You will see the color change as it passes over what is already there - whether in Continuity or not!) Release the button when you have found the desired color.

Alternatively, bring up the Color dialogue box (as in the image below) by clicking the rectangular field displaying the selected Font or Background color to the very right of the eye-droppers.
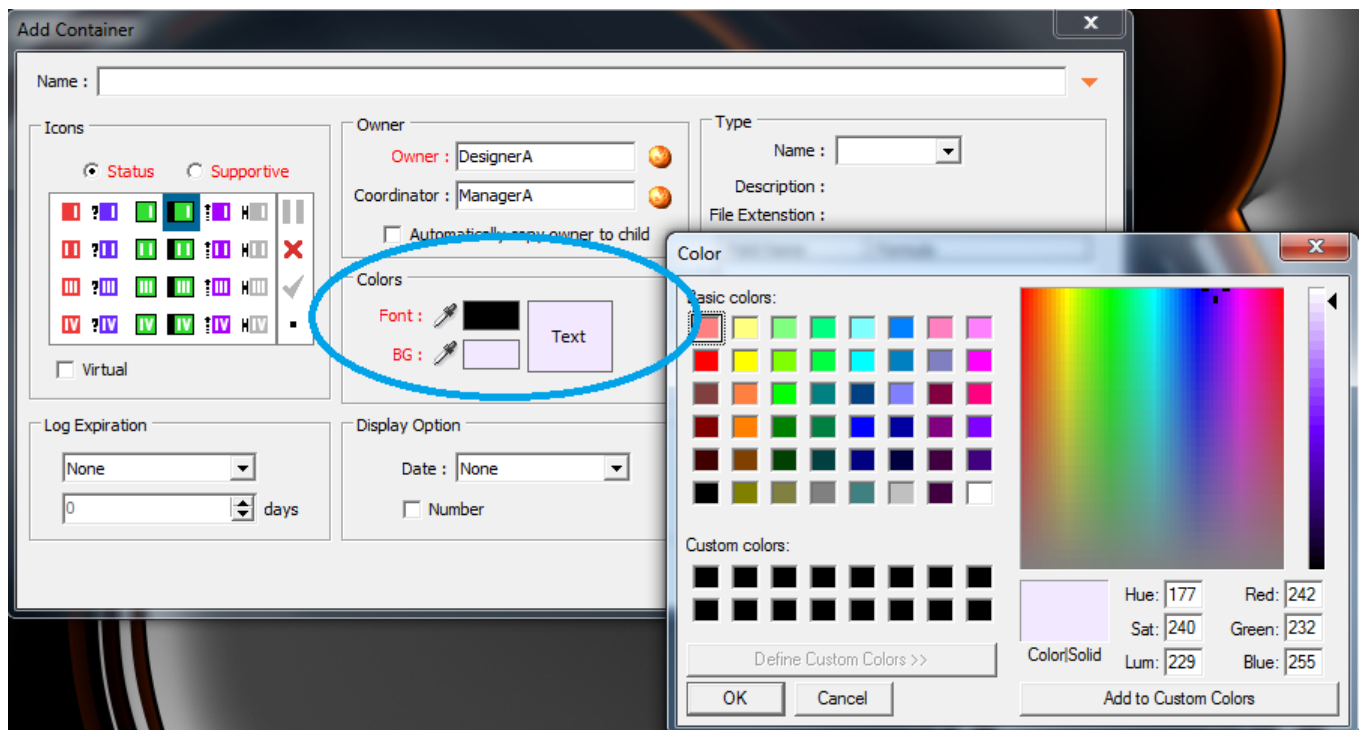
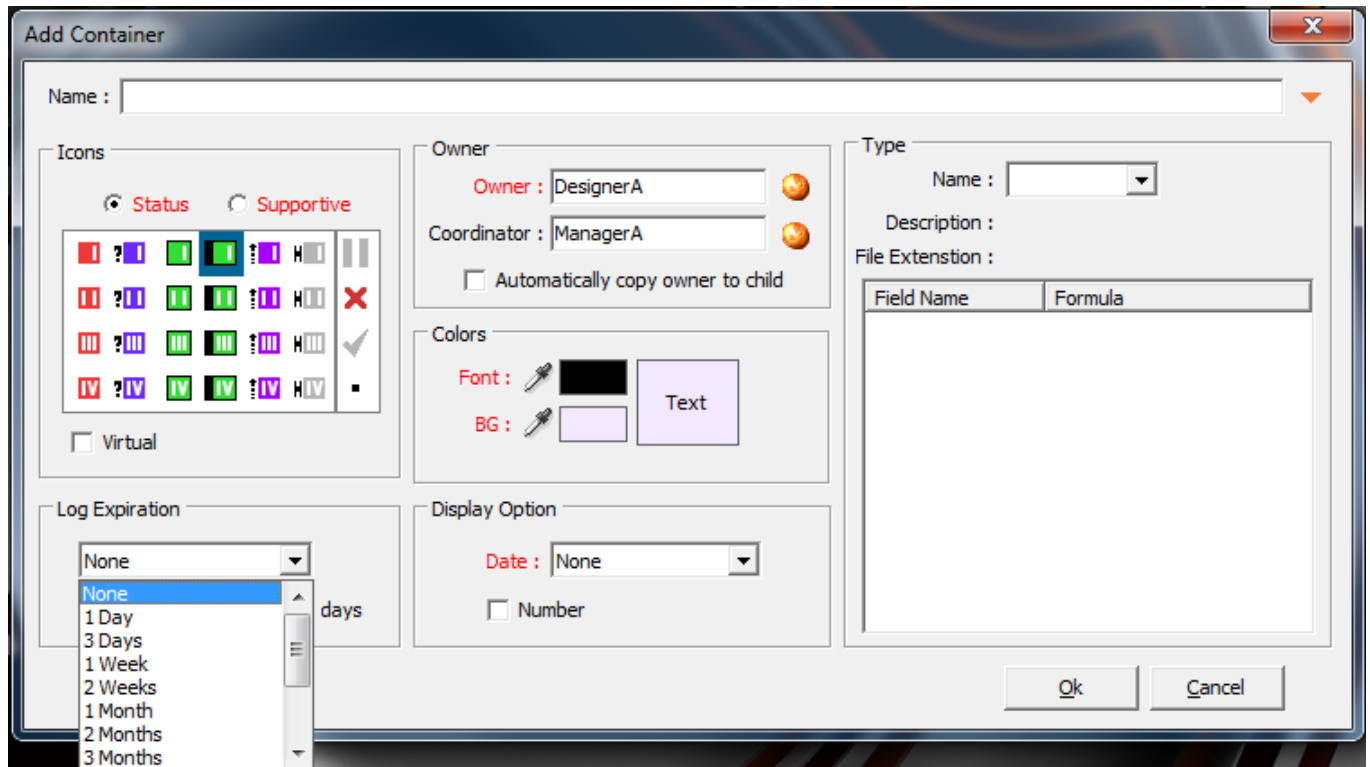Once you have selected your color scheme, click OK to confirm.

Log Expiration: You can choose to have an expiration date for the logs of your container. When a log expires, it will automatically be deleted off the server. Use this option if your want logs of a container to be automatically deleted every day or every three days, etc. There are two ways you can set an expiration date. Either use the arrow up/down keys to load in the number of days until expiration.

Or use the drop down arrow to bring up a selection of pre-defined time frames.

Once the container has been created in the tree, this clock icon: ☉ will then appear on top of the container's status/supportive icon to warn all users that logs of this cotnainer will expire and be deleted automatically.

<u>Display Option</u>: If you want the any of the two properties to be displayed in the tree view, choose kind of date or check the number tick-box.

Date gives you the options of None; Day; Month or Quarter. Choose this option if you want to display the date of a container as configured in the Gantt chart.

Number gives you the option of numbering the container by its unique container number. This can be useful when referring to numbers for different issues, software bugs, etc.
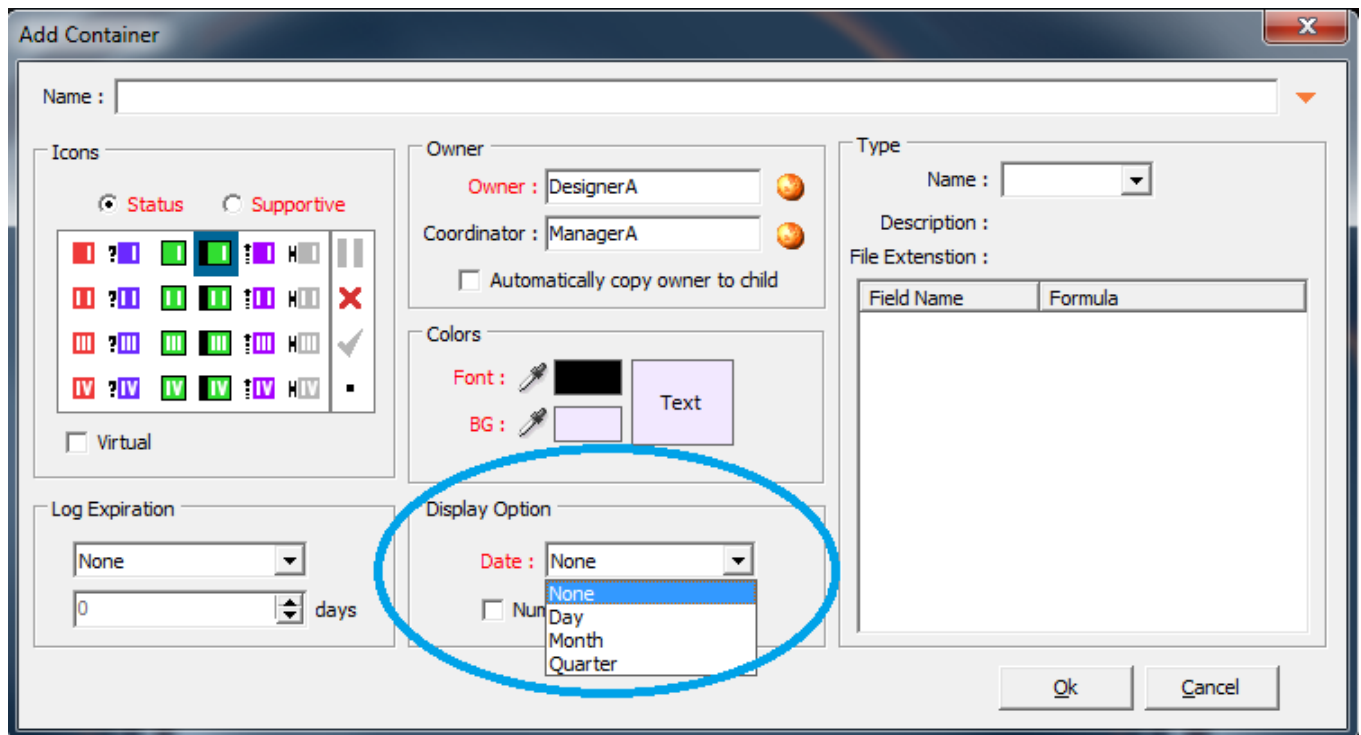
When you're done setting the container up, pick **Ok** or press simultaneously shortcut keys **Ctrl**+**S** for Save and the Task will appear on the Tree. It will appear sub of the Task you have chosen.
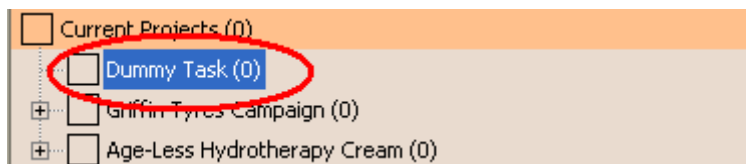
To cancel the operation click **Cancel** at the bottom of the Add Task pop-up box or hit shortcut key **Esc**.

Create Containers from Logs

When dragging one or multiple logs from one container and drop it onto another container, you are given two options: move logs (see the logs section) and create containers from logs. Create containers from logs allow you to select one log, dragging it onto a destination container and a new container will be created where the log title becomes the container title. The log will be moved to this new container as well as any replies that it has.

Modify Container

To Modify a Task/Container select the desired Task(s) in the tree and click on the top left Modify icon: .

Alternatively, right-click in the Tree list over the desired Task and a drop down menu will appear. Select Modify.
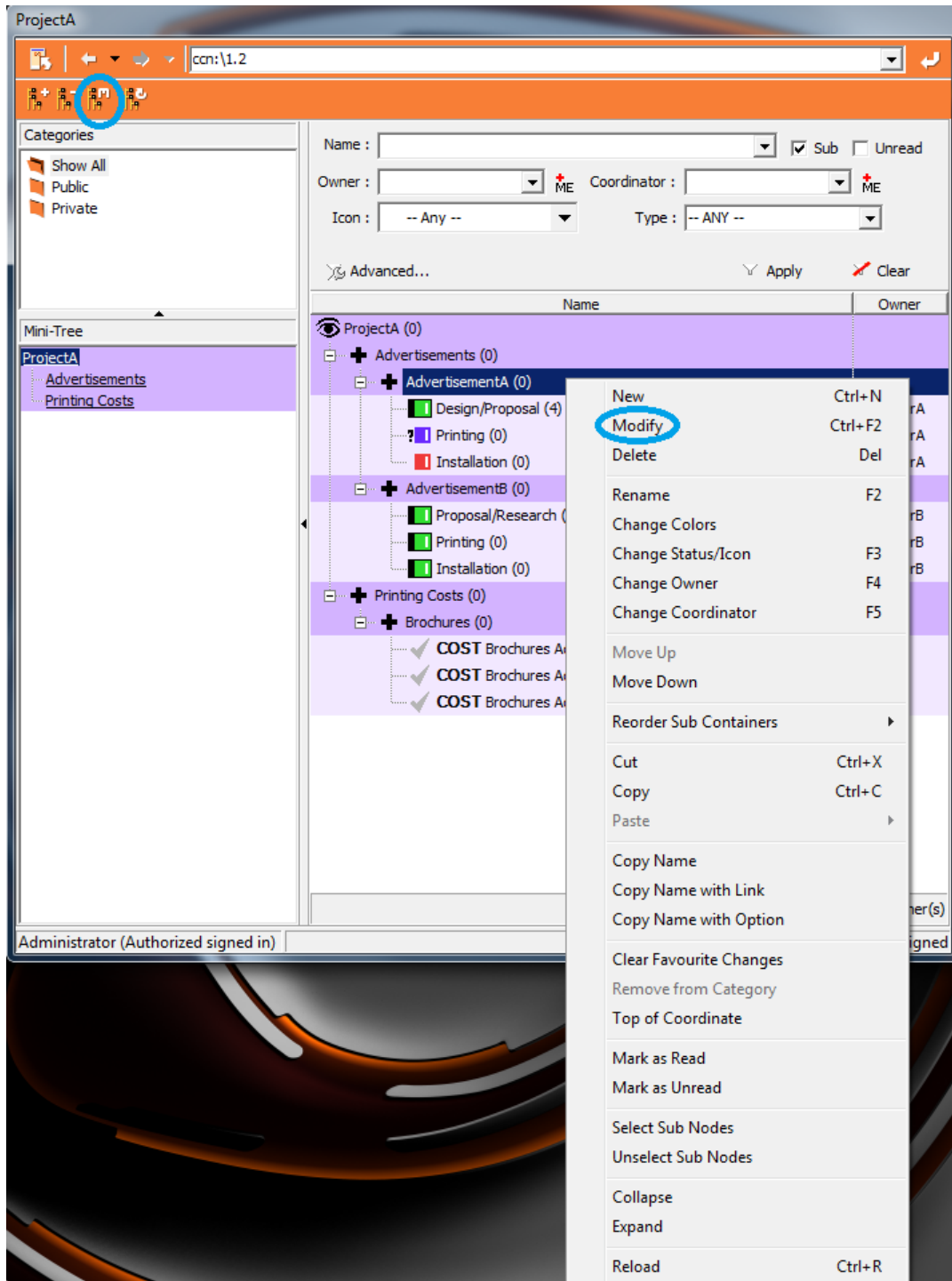

Or press simultaneously shortcut keys **Ctrl**+**F2**.

Once you have done any of the above a **Modify Task** window pops up, which lets you change all properties that the add new dialogue lets you set up.

As seen in the screenshots above, as soon as a container property (name, owner, etc) is changed in this dialogue box its name changes color to red. This is particularly useful when multi-selecting and so **modifying multiple containers at the same time,** which can be a **huge time-saver** if you wish to rename many containers to the same name, set up the same log expiration or display option for several containers, etc. But be aware, the new settings for changed properties in red will apply to all selected containers. If you make a mistake and do not want to change all the ones in red, simple click the Cancel button or hit Esc on your keyboard.

Delete Container

To Delete a Task/Container select the desired Task(s) and press shortcut key **Del**/**Delete** or click the top left **Delete Log** icon: or right-click in the Tree list over the Task and a drop down menu will appear. Pick **Delete**.
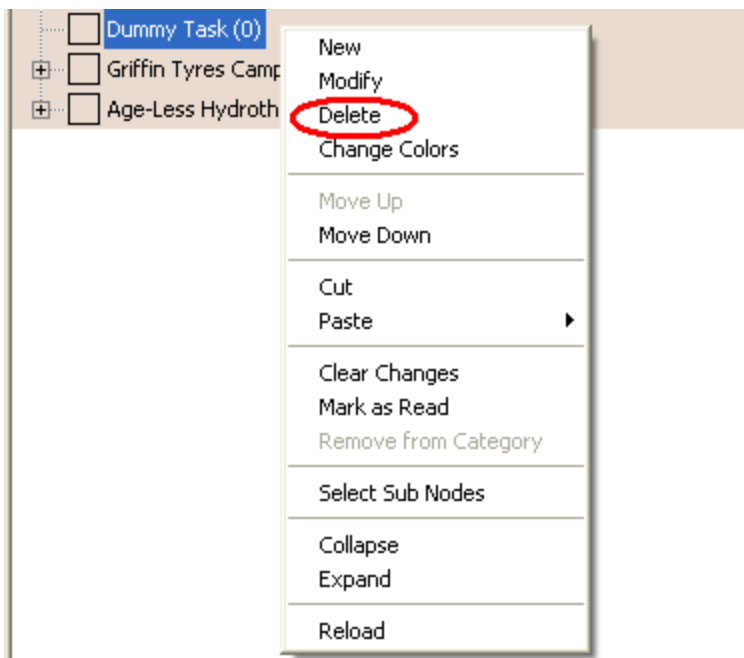
Once you have done any of the above a pop-up box will ask if you are sure first -
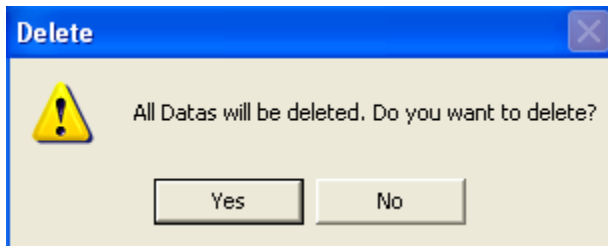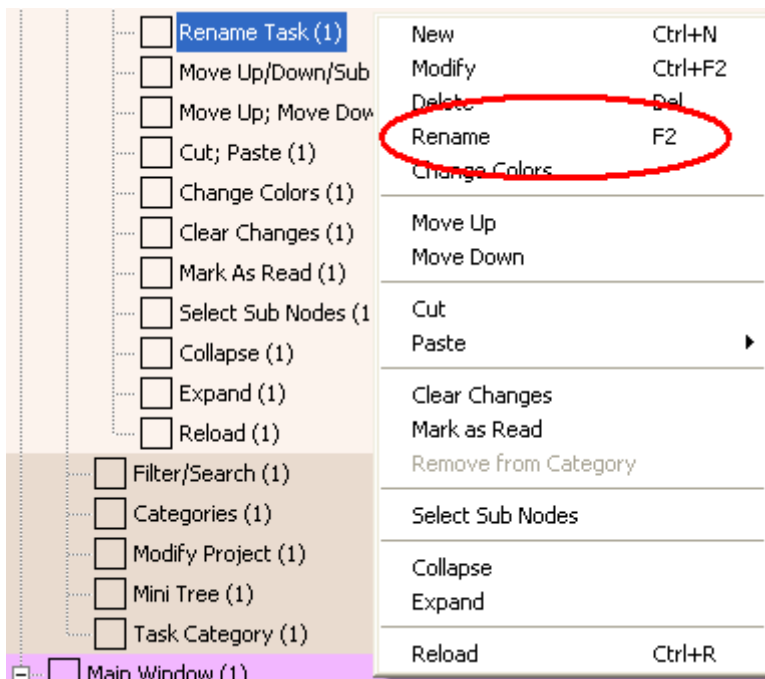

... and to prevent accidents you cannot delete a Task if it has sub-Tasks!

Rename Container

To rename a Task/Container select the desired Task and...

... press shortcut key **F2**

... or right-click over the desired Task and a drop down menu will appear. Select **Rename**.


You will be able to type in the new name. To confirm press **Enter** on your keyboard.

Move Up/Down/Sub

Tasks/Containers on the right hand side of the Tree Window (the **Tree**) can be moved and organized by a simple **drag and drop**.

Select the Task you want to move. Drag it to where you want it to be. The Tasks will change color as you move over them and a faint box outlines where the Tasks that you are moving is. Stop at the Task of your choice - in this case 'Griffin Tyres Campaign'...
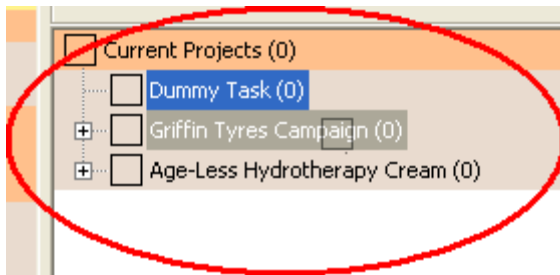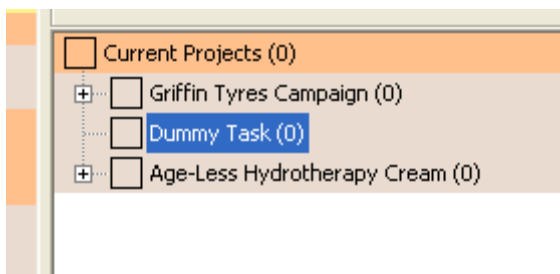

... and a further drop down menu will appear.
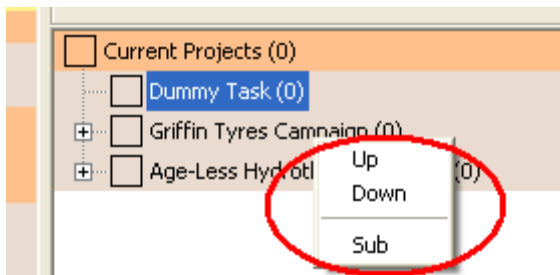
If you want it to be above the Task where you have stopped **Up**; for below choose **Down**; and if you want it to be a sub-container of 'Griffin Tyres Campaign' choose **Sub**.

I chose Down. Below you can see the Task in its new position.

(For this to work, make sure that you are on the correct hierarchical level. You cannot, for example, move a Task above or below the top hierarchy currently displayed in the Tree.)

Move Up; **Move Down**

When selected from the drop down menu this option moves the Task/Container you have chosen up (**Move Up**) or down (**Move Down**) by one place.

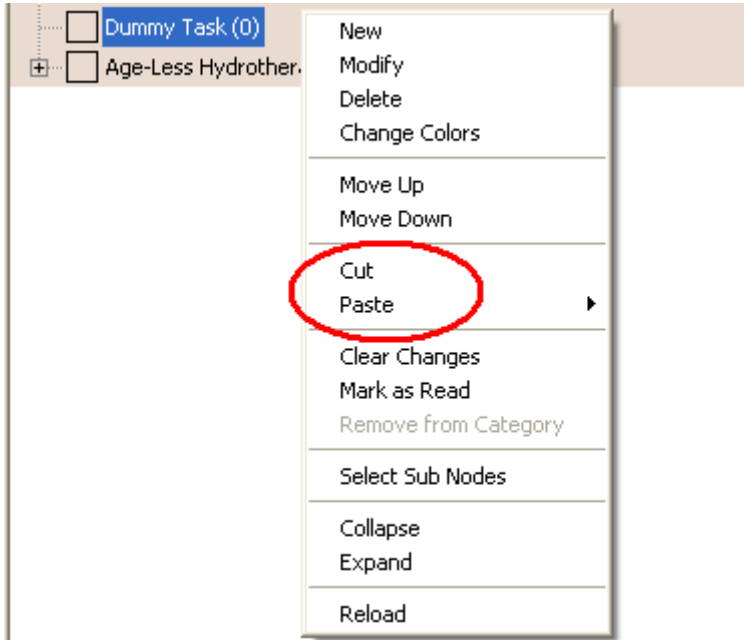To move a Task further than this use **drag and drop** (**Move Up/Down/Sub**).
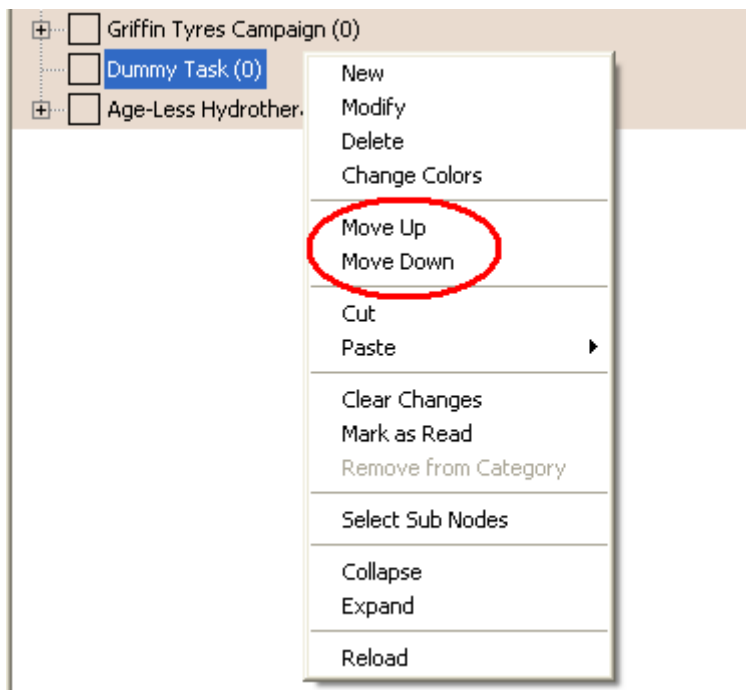
If the Task is at the top of its sub-container only 'Move Down' is visible.

If the Task is at the bottom of sub-container only 'Move Up' is visible.
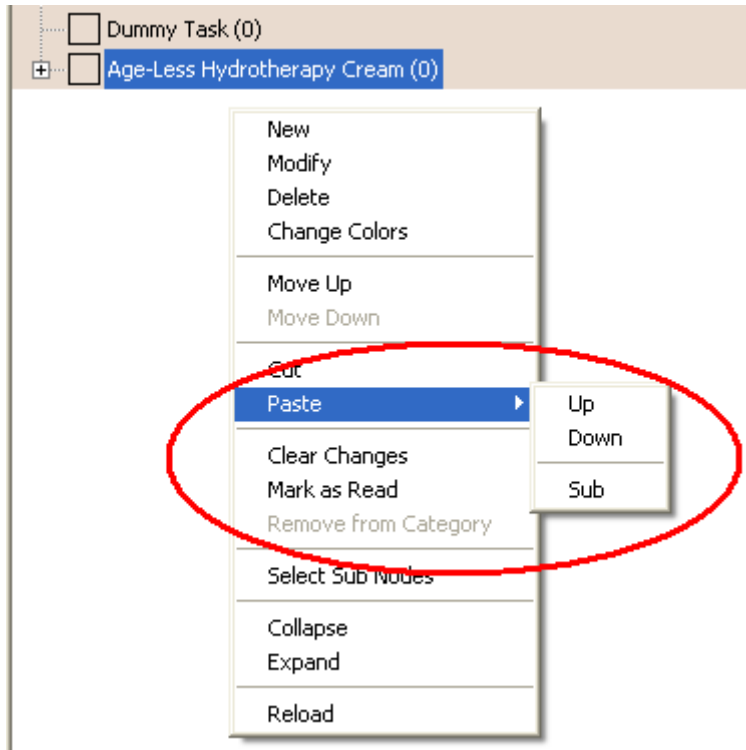
Cut; Paste

When selected from the drop-down menu allows you to cut and paste the Task/Container to another position.

Right-click the Task you want to move; select **Cut** from the drop down menu.

Then right-click the position you want to move the Task to and select **Paste** from the drop down menu.
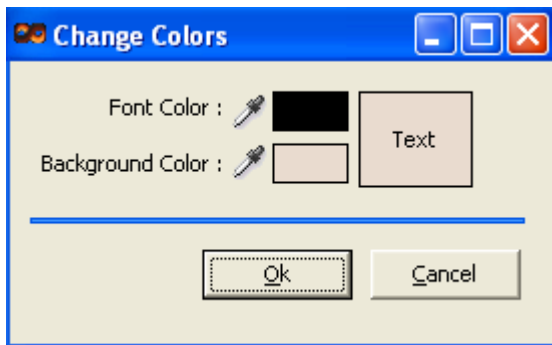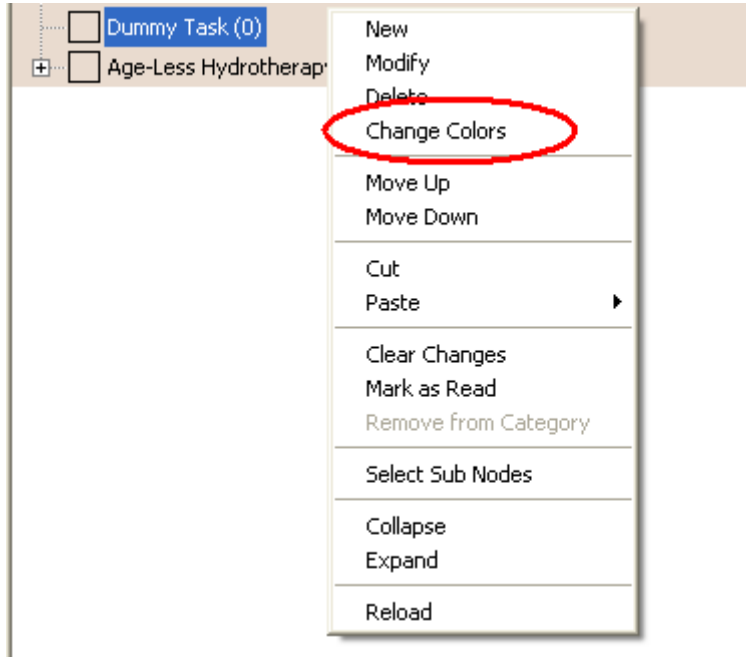
This brings up another sub-menu.

When you have the 'cut' container positioned in its new location you can choose whether to Paste it Above (**Up**) or Below (**Down**) the container you are over; - or whether to make it a sub-container (**Sub**) of that Task.

Change Colors

When selected from the drop down menu this option brings up the color picker on its own.

Put your cursor over the little eye-dropper to the left of 'Background' or 'Font' and with the left mouse key depressed drag it over the screen. You will see the color change as it passes over what is already there - whether in Continuity or not! Release the button when you have found the desired color. Then hit **OK**.

Clear Changes

Is used if you have made changes to the Task/Container - for example added a Log or renamed it - but you do not want people who track this Task in their Favourites to get a notification.
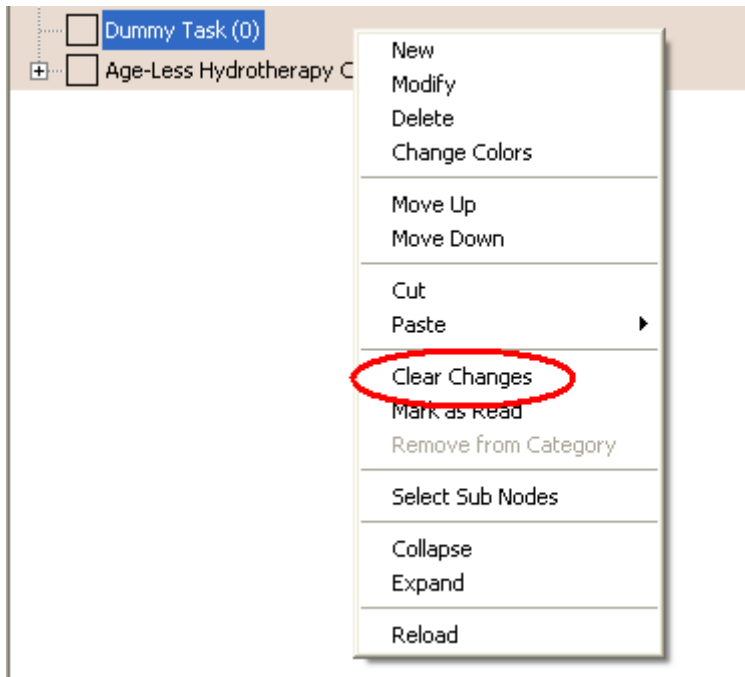
Changes that do not affect content - such as re-naming - don't need to be generally notified, for instance.

Mark as Read

When any changes have been made to a Task/Container or its contents the Container is **bolded** to make it easily visible - very useful when working with a lot of Tasks.

When selected from the drop down menu this feature allows you to unbold any Tasks without having to read the contents. This way it is easier to work with and view the Tree.
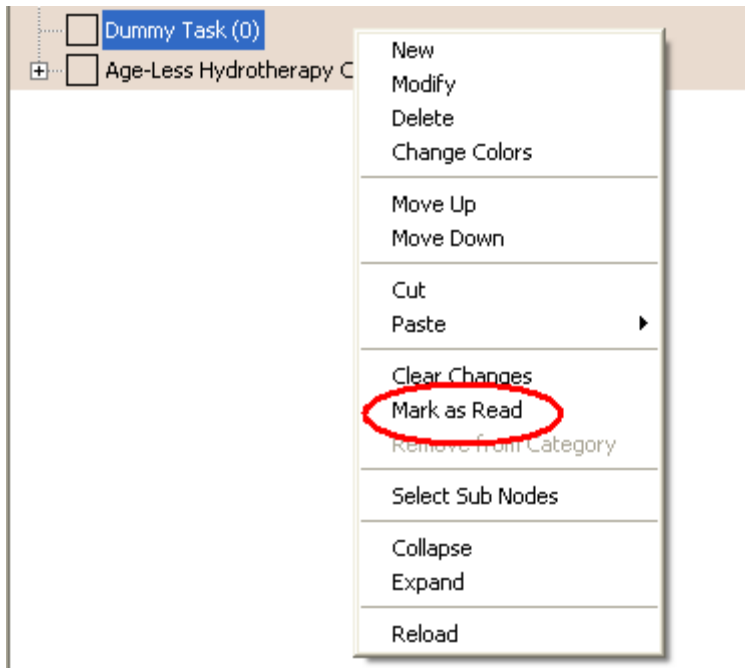
Select Sub Nodes

When selected from the drop down menu this option allows you to select a
Task/Container and all its sub-nodes for easier Modifying; Deleting; Changing
Colors; 'Clearing Changes'; 'Marking As Read'; etc.

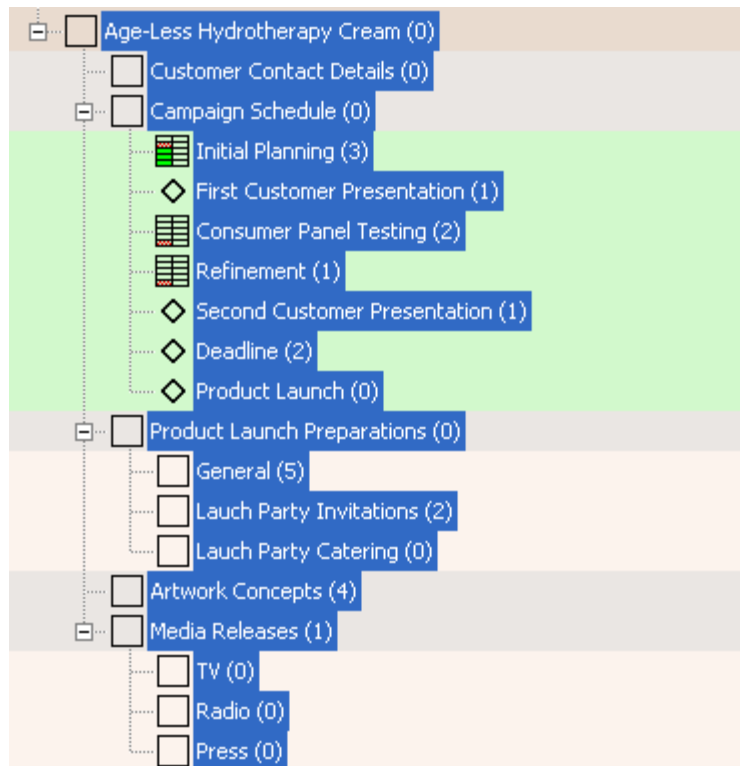- Age-Less Hydrotherapy Cream (0)
  - Customer Contact Details (0)
  - Campaign Schedule (0)
    - Initial Planning (3)
    - First Customer Presentation (1)
    - Consumer Panel Testing (2)
    - Refinement (1)
    - Second Customer Presentation (1)
    - Deadline (2)
    - Product Launch (0)
  - Product Launch Preparations (0)
    - General (5)
    - Lauch Party Invitations (2)
    - Lauch Party Catering (0)
  - Artwork Concepts (4)
  - Media Releases (1)
    - TV (0)
    - Radio (0)
    - Press (0)
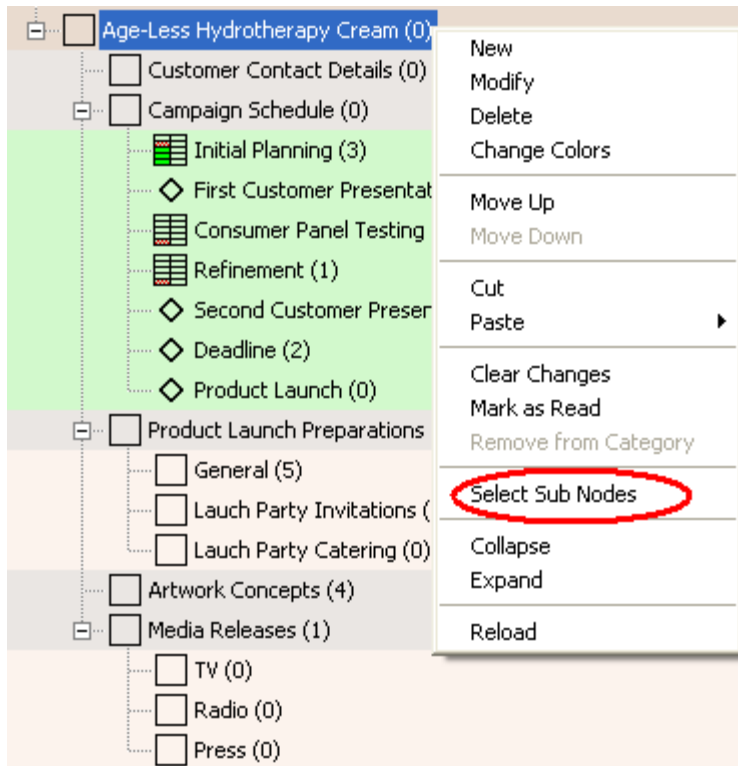
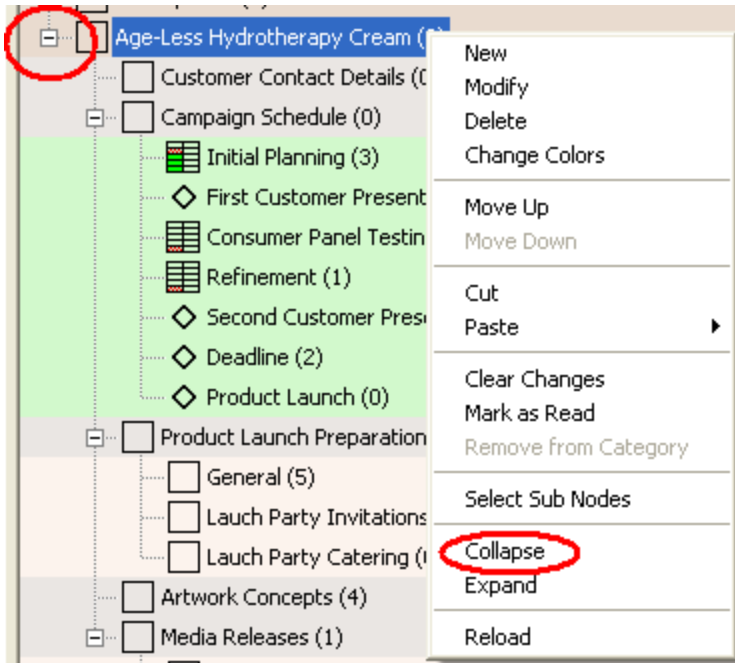## Collapse

When selected from the drop down menu this performs the same function as selecting the '-' on the left hand side of a Task/Container heading - it collapses all its sub-containers back into that one heading.

Another way of collapsing a Task is to **double-click its name**, in this example 'Age-Less Hydrotherapy Cream'.

Expand

When selected from the drop down menu **Expand** performs the same function as selecting the '**+**' on the left hand side of a Task/Container heading - it expands all the sub-containers of that heading and makes them visible.

Another way of expanding a Task is to **double-click its name**, in this example 'Age-Less Hydrotherapy Cream'.
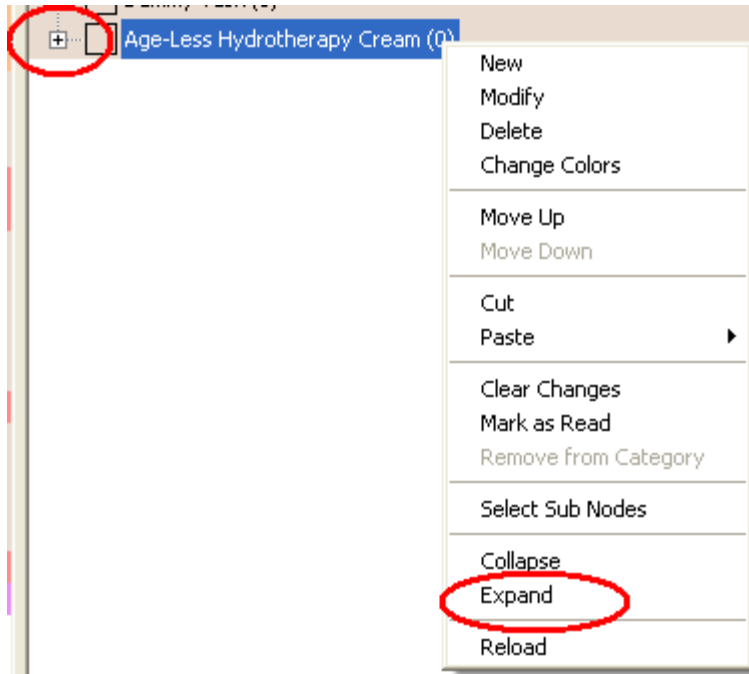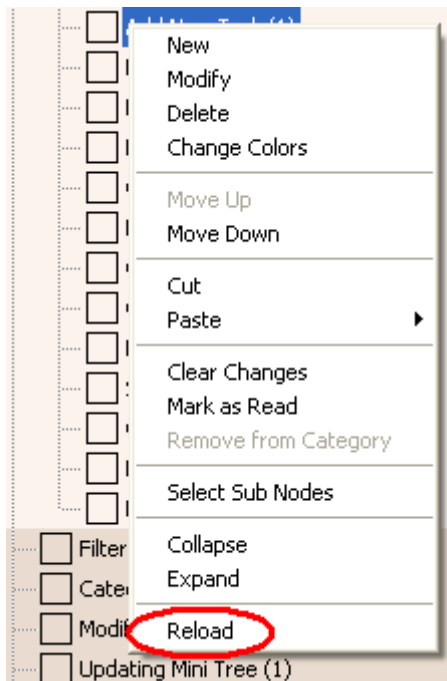
Reload

To reload the entire contents of the **Filter Tree** so you can see any changes...

... press simultaneously shortcut keys **Ctrl**+**R**

... or select the **Reload Task Lists** icon: 📊 the top left orange task bar

... or right-click on any container in the tree and a drop down menu appears. Pick **Reload**.

Once you have done any of the above this option reloads the entire contents of the **Tree**.
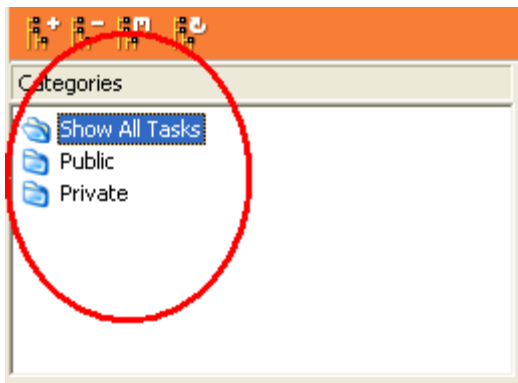
Categories

Categories is only available in the Project View. They provide another way of filtering content. Categories are particularly useful to group Tasks that do not follow the Project's Tree structure but are scattered across the whole Tree.

To use a Category, simply click on its name and the Tree will be filtered and only show the Tasks that belong to this Category.
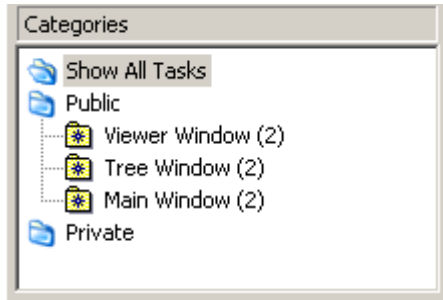
By default all Tasks of a Project will be displayed to you as 'Show All Tasks' is highlighted in the Categories-section at the top left. In case you have used a Category and so display a filtered view of the Project, but wish to see view all its containers again, simply click this 'Show All Tasks'-Category.
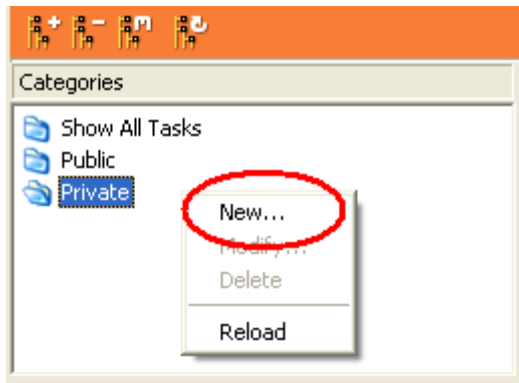

There are two types of Categories:

The **Public** Categories are set up by an admin and are visible to all users. Therefore, they tend to be helpful for most users.

Private Categories, on the other hand, can only be set up individually per user.

To **Create a Category**, place the cursor over Private. Right-click - and select **New**.
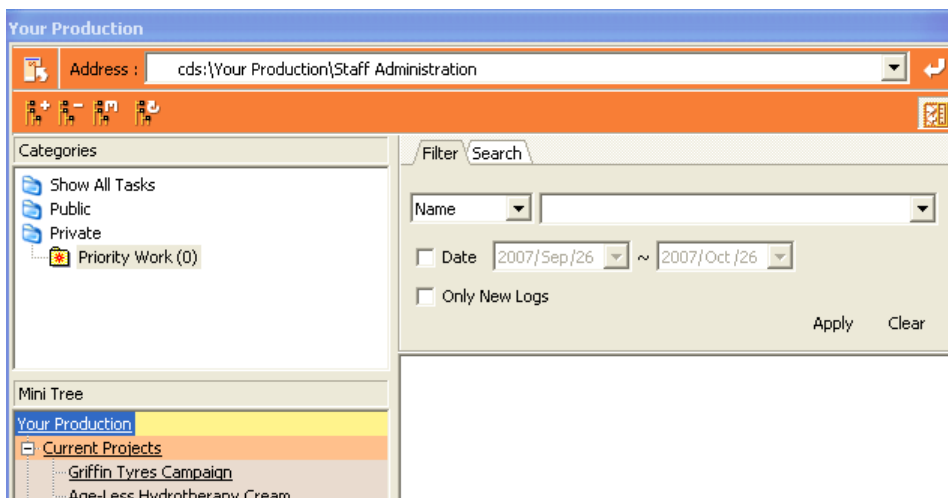

A pop-up box appears. Choose a name for your new Category. Here we've created one called 'Priority Work'.
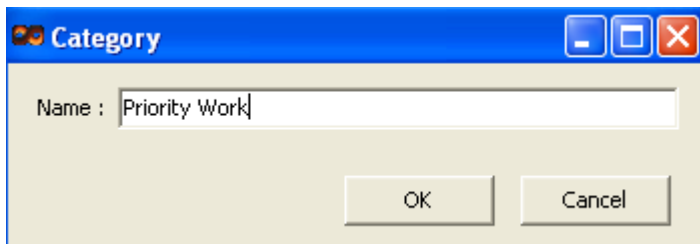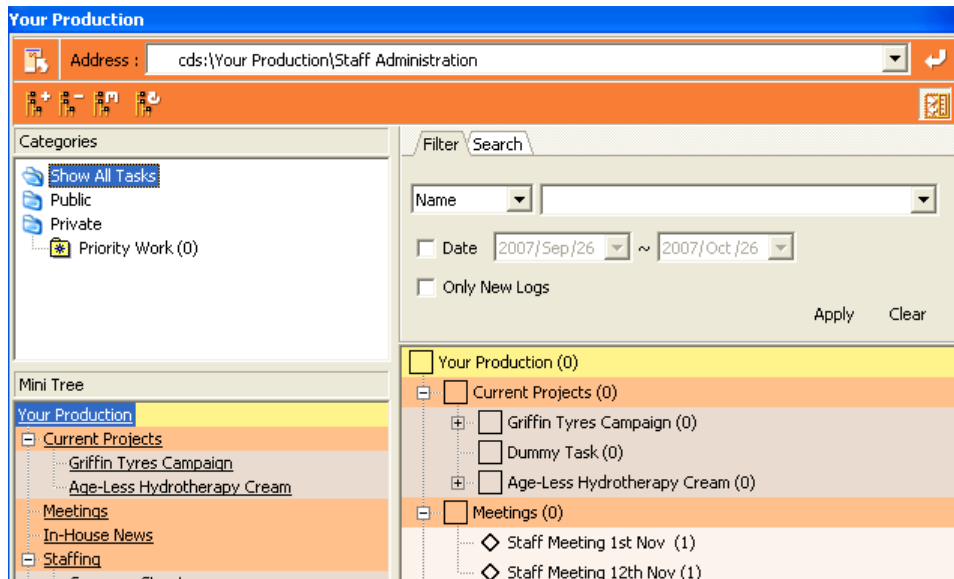

When you're satisfied with the title click **OK**.

You will see that the Tree on the right disappears. That's because the new category is selected and you haven't yet added any folders to this new category you've just created.

Move the Cursor back up to **Show All Tasks** and click. The Filter Tree reappears.


Choose the containers you want to include in your new Category by dragging and dropping them from the Tree list into your new Category 'Priority Work'. Here we're going to choose 'Dummy Task'.

Now when you click your new Category you will see the Task(s) you have placed there but only those! Like this:
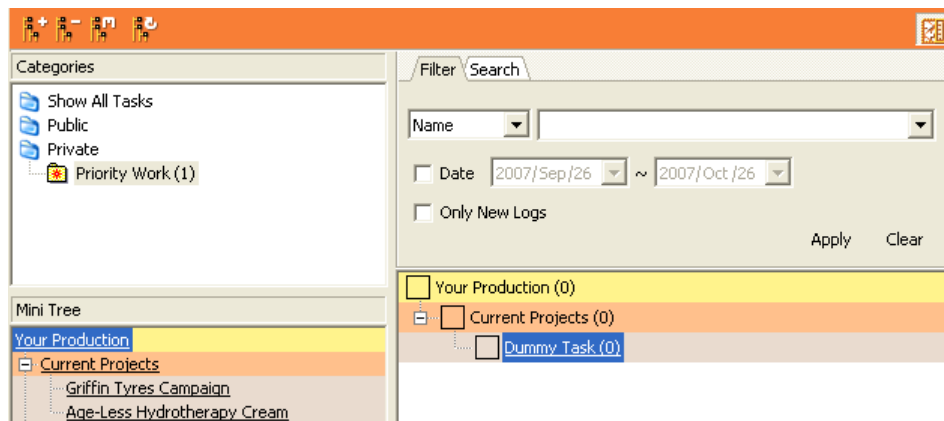
If you want to remove a Task Container from a Category right-click on the Container in the Tree, select **Remove from Category** - and it's gone!
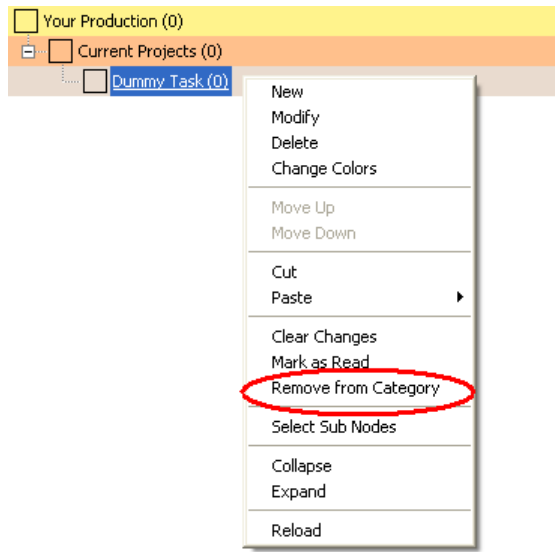
To **Rename** a **Private Category**, double-click its name and choose 'Modify'. Enter the new name and click 'OK'.

To **Delete** the **Private Category** altogether, click 'Delete' in the same scroll down-list and confirm by clicking 'Yes' in the pop-up box.

Coordinate View

Coordinate gives a view of containers organized by their assigned owner. It basically acts as a task list for each user. Only containers set to a status icon are displayed in coordinate - not those with a supportive icon. Unassigned containers do not appear in this view either.

To launch the Coordinate View, click on the ⬛ icon shown below.
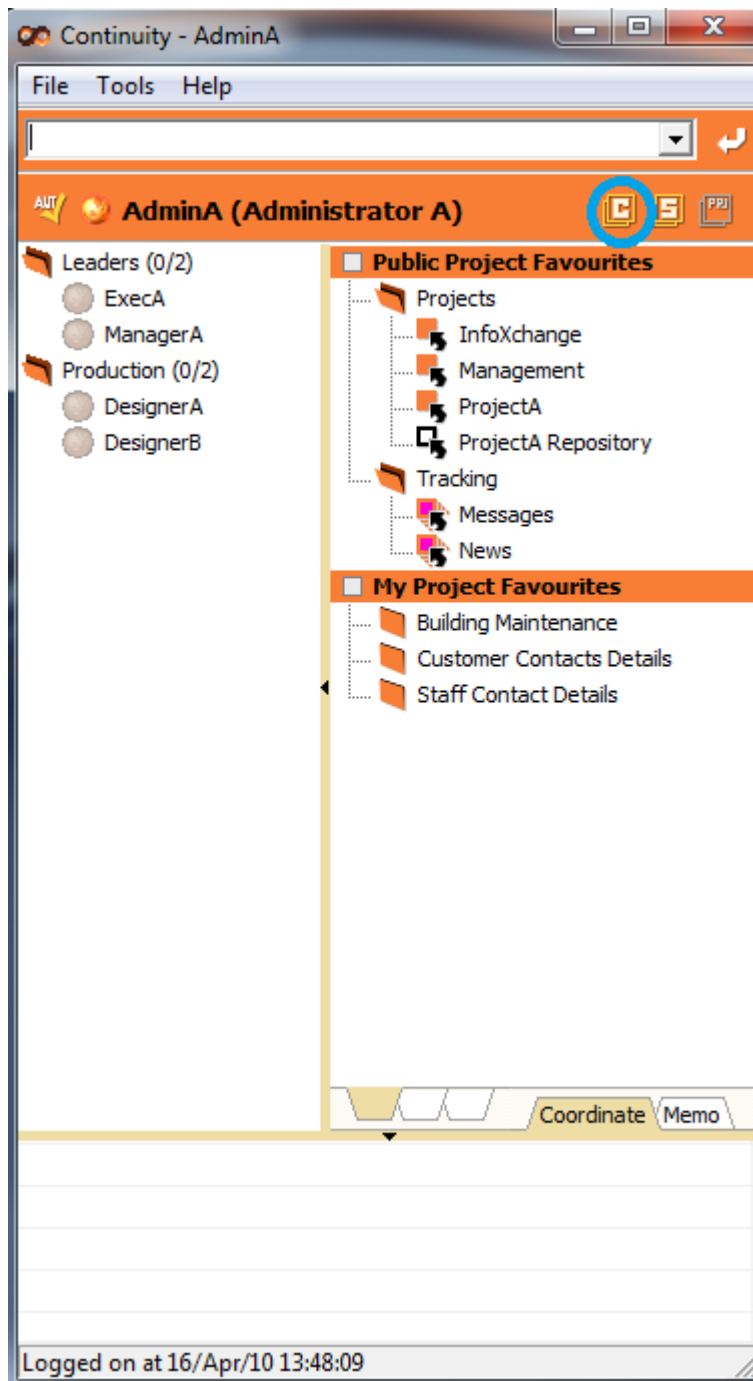
Two additional screens will pop up.
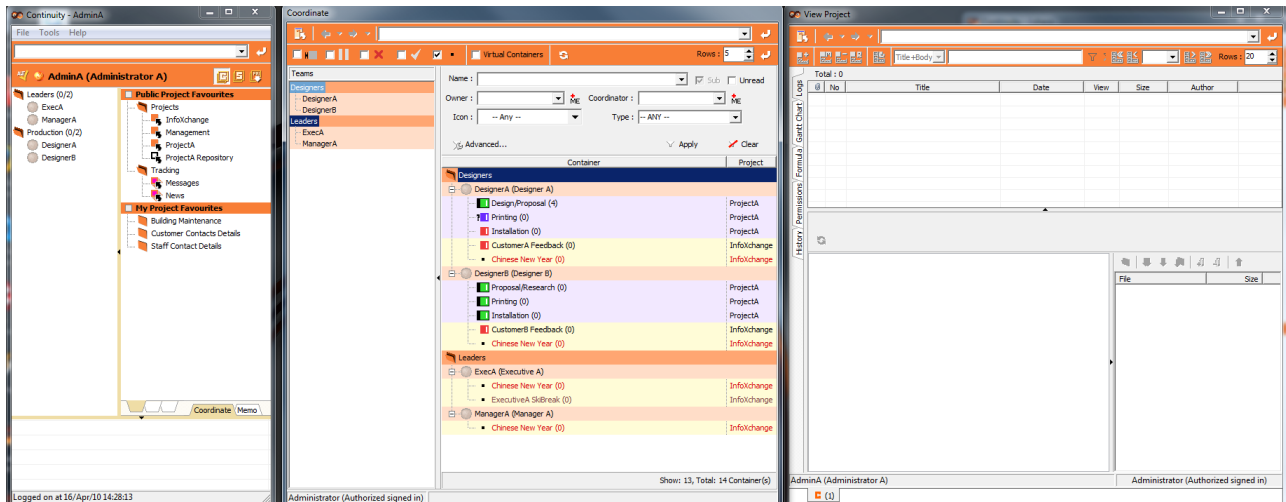
Create/Rename/Delete Teams
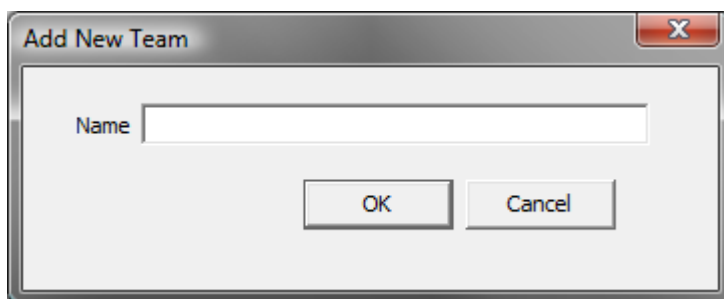
To create a new team of users - members - right-click in the left-most field called Teams. Select Create Team in the menu that appears.

| Create Team |
| Rename Team |
| Delete Team |
| Add Member |
| Delete Member |
| Select Root Nodes |
| Clear Selection |
| Collapse |
| Expand |
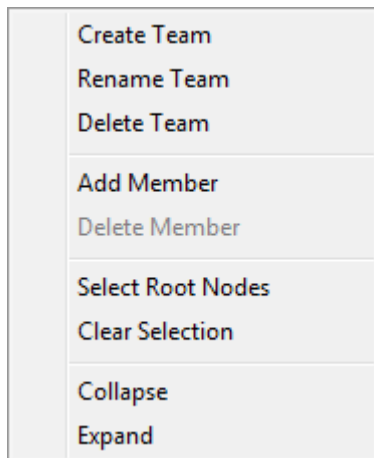
Give your new team a name in the window that pops up and click OK.

Add New Team

Name:

OK   Cancel

The same right-click menu can be used to rename an existing team. Select the team you wish to rename, choose the Rename Team option and the same window (above) will appear to allow you to enter a new name.

The right-click menu also allow for deleting teams. To delete a team, you must delete all its members first (see below). Then select one or multiple teams, right-click and choose Delete Team in the appearing menu.

Add/Delete Members

To add a new member to your team - right-click in the Teams field again. Select Add Member in the menu that appears. Select one or multiple users in the window that appears and click OK.

The same right-click menu can be used to delete one or multiple users from a team. Select the user(s) you want to delete in left-most field Teams, and choose Delete Member in the menu. Confirm by clicking OK in the window that appears.

Reorder Containers

Containers can be freely reordered as a tree structure. To manually reorder container, select the container(s) you wish to move, drag them to a destination container, and choose among the options in the menu that appear: up; down or sub.

Alternatively, select the container(s) you wish to move, right-click to bring up the menu and choose cut (or use shortcut key Ctrl+X). Select a destination container - in the same project OR in any other project - bring up the right-click menu and choose paste (or use shortcut key Ctrl+V) then up, down or sub. The container(s) will be **moved** to this destination.

If you wish to duplicate a container with all its properties, you can also use the copy function. Select the container(s) you wish to copy, select copy from the right-click menu (or use shortcut key Ctrl+C). Select a destination container - in the same project OR in any other project - bring up the right-click menu and choose paste (or use shortcut key Ctrl+V) then up, down or sub. The container(s) will be **copied** to this destination.

To automatically reorder a container's all sub-containers - either by name, status icon or Gantt chart date - select the container and right-click to bring up the menu. Choose Reorder Sub Containers, then make your choice between name, icon or Gantt chart date.

Name orders all sub-containers alphabetically by their container name.

Icon orders all logs by status icon. The higher priority the higher in the logs list (IV before I) and the statuses are ordered in the following order: To-Do before Review, then Signed I, Signed II, On-Hold, Finished, None, Not Used with Delete last.
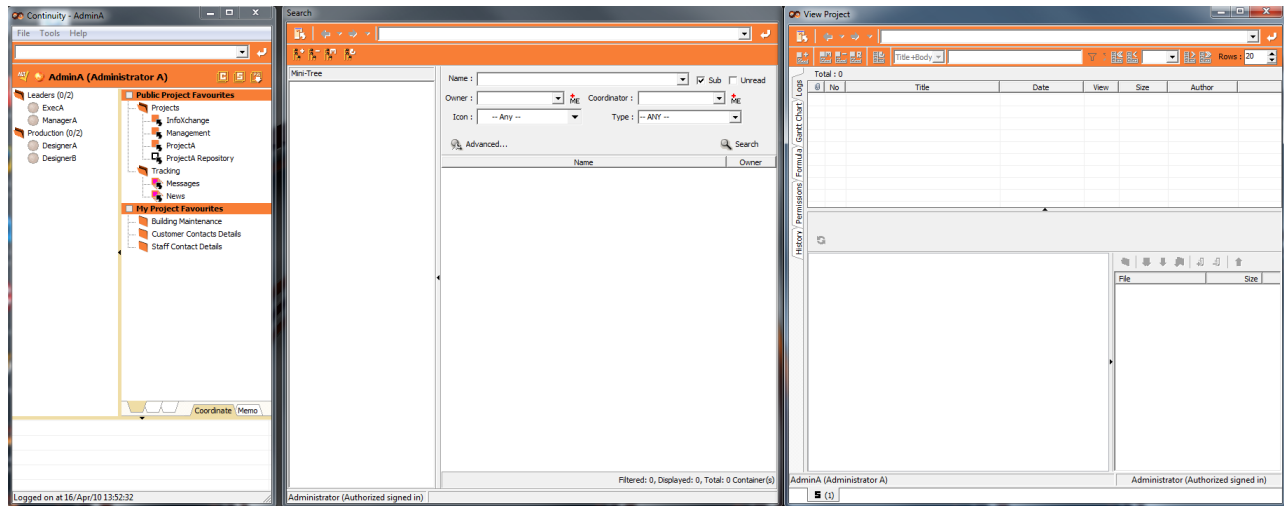
Gantt, Name orders all sub-containers by their date as set up on the Gantt chart. If there is more than one container with the same date information, these containers will be ordered alphabetically by their container name.
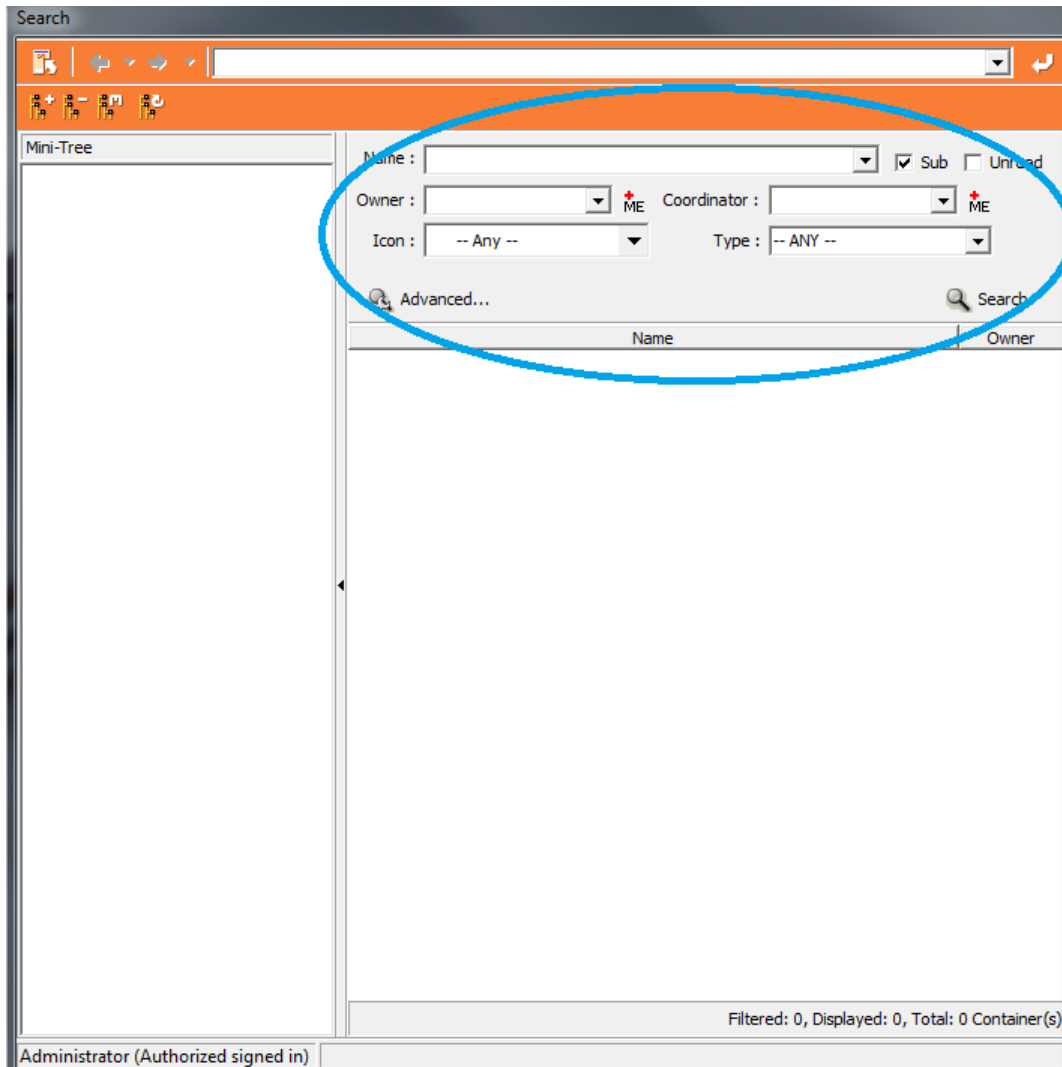
Search View

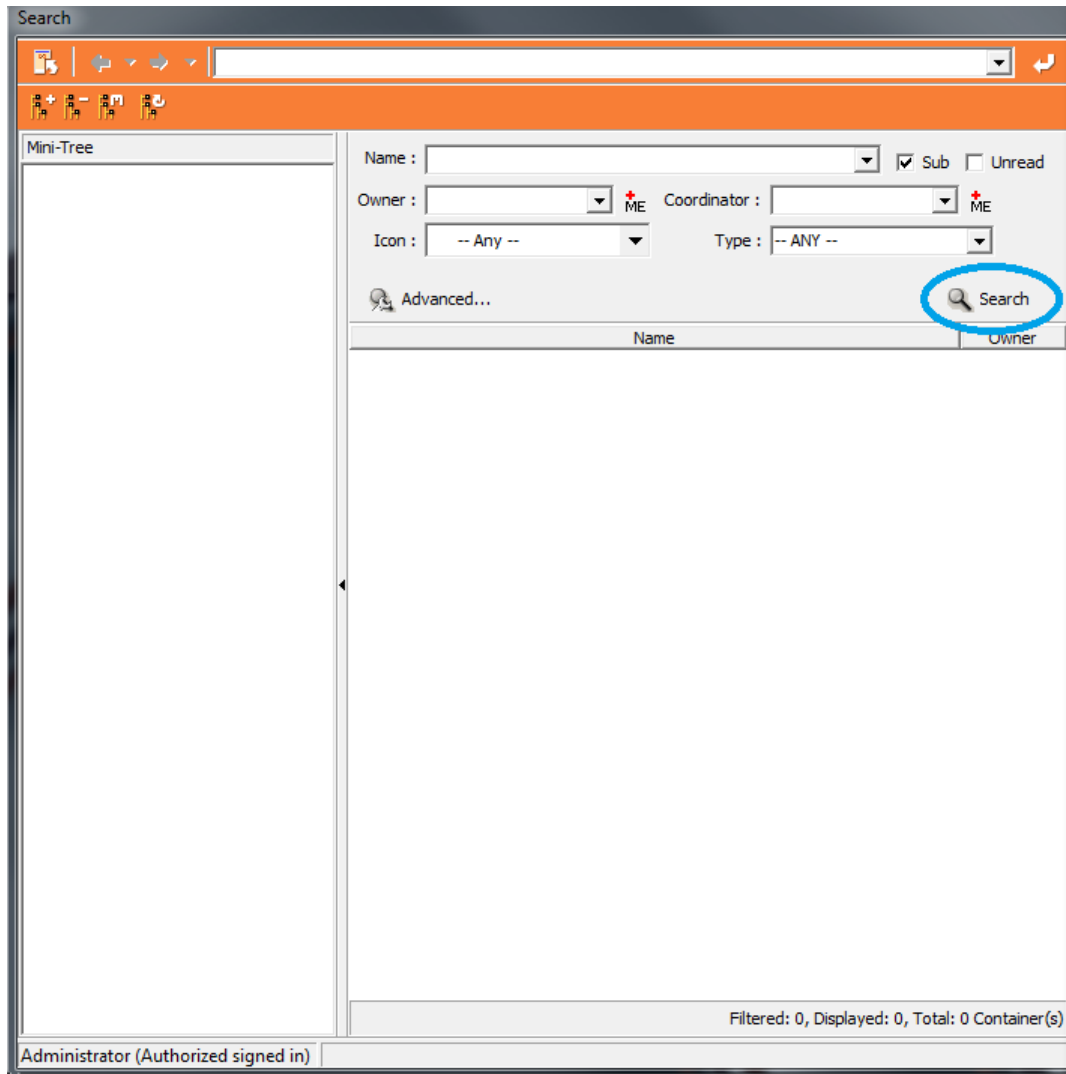To launch the Search View, click on the ▣ icon shown below.
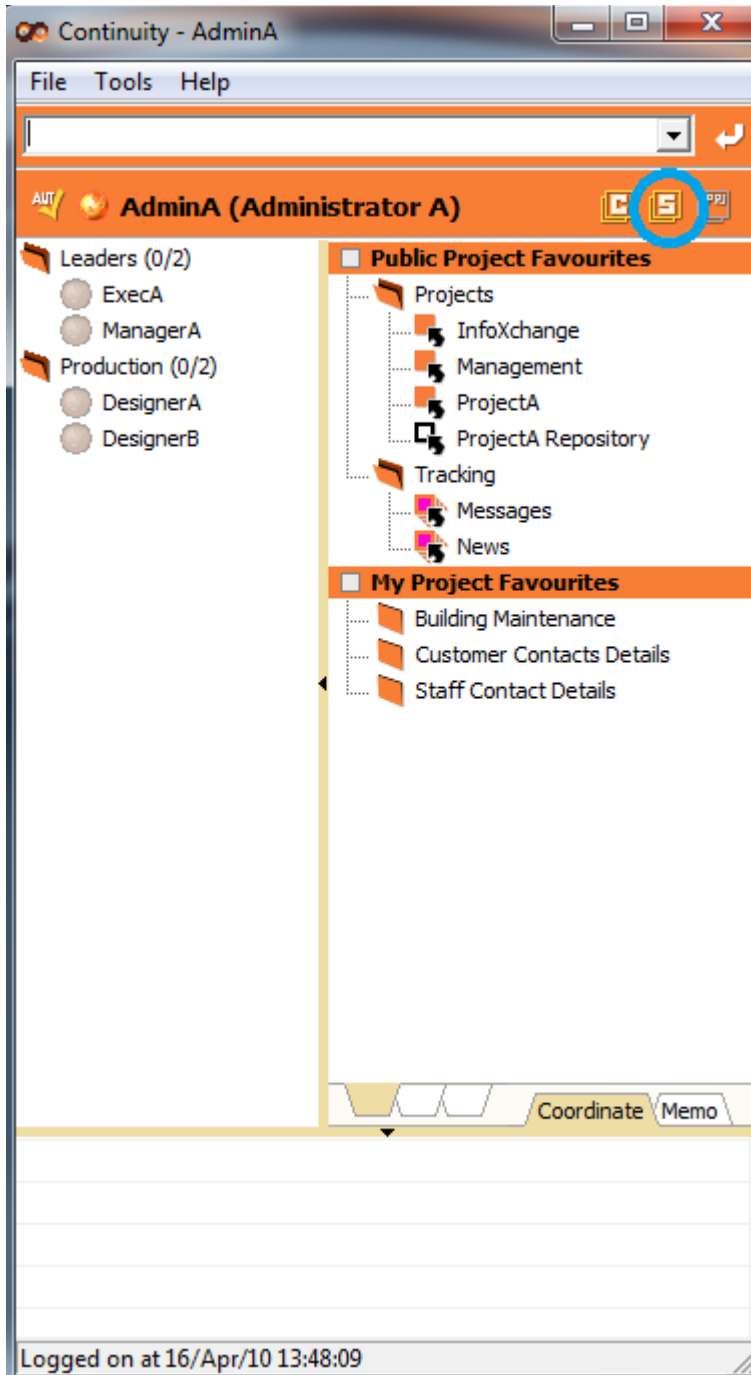
Two additional screens will pop up.

The panel you need to use within the Search View is from the centre screen, indicated below circled in blue.

Once you have selected your search options, click on the Search magnifying glass icon.

Further instructions on how to use the search function can be found under the Filtering Tools' Search section in the chapter "The Tree" above.

Client: Viewer Window

Logs

Logs allows the entering of information in any format - pictorial, charts, text - or even links to other locations within Continuity.

The main page is split into three: **Task List**; **Preview** and **Attachments**.

Task List

The top part shows the **Task List**: the Logs; creation date; how many times the Logs have been viewed; size and author.

@	Title	Date	View	Size	Author
M	Logs	07/09/19 21:45:41	7	23KB	🟠

Total : 1

If the Log Title is in **bold** print it means it is new or has been modified in some way since you last looked at it. This makes it easy to keep on top of changes and new entries.

There are two types of logs - Interactions and Manifests.

Interactions - which is the default setting for general logs.

Manifests - *which are perfect for important information. They really stand out as they are highlighted in pink and stay at the top of the Task Log List page*.

Total : 3

@	Title	Date	View	Size	Author
M	Feedback	25/Sep/07 20:18:23	5	1KB	🟠 c.herlin
M	Stina's feedback	14/Nov/07 10:24:20	1	6KB	🟠 c.herlin
M	Rick's feedback	30/Oct/07 23:04:39	1	1KB	🟠 c.herlin

Preview

The bottom left part shows the log itself - the **Preview** in view only mode. On the right hand side you can see the date it was created - and <u>exactly</u> when it was last modified. If several people are working on and updating a Log at the same time this feature is extremely useful.

Logs
Author 🟠   Created on the 19/09/2007 21:45:41 - Updated on the 26/09/2007 21:44:34

Logs

Attachments

The bottom right part shows any log attachments. To open a file attached to a log, select the file(s) you wish to open and hit the **download** icon: ⬇ or right-click and choose 'Download Selected Files' from the menu that pops up. Alternatively, double-click on the desired file listed with a paper clip icon in the right-hand field of the Preview, circled in blue below.

To download the selected files to a directory of your choice, click this icon: 🔻 or 'Download Selected Files to Custom Directory'. A window will pop up where you get to choose to what directory to download the selected file(s).
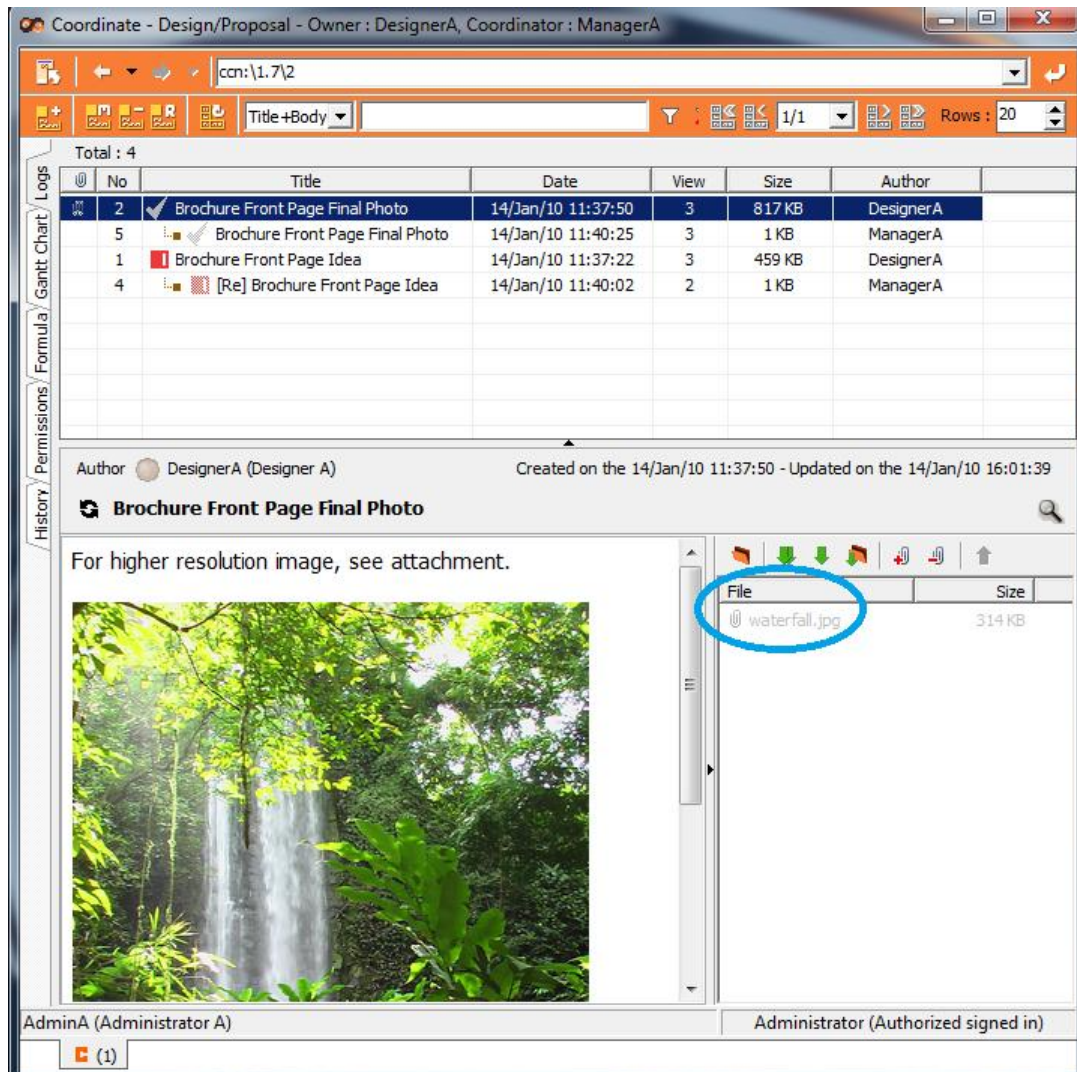
An easy way to download all attachments is to simply click the download all icon: ⬇ or right-click and select 'Download All Files' in the menu that pops up.

Clicking the open download directory icon will open this directory in Windows Explorer. The same option exists in the right-click menu, right click in the attachment field and choose 'Open Download Directory' in the menu that appears.

Navigate Log Pages and Rows

The toolbar's right side lets you select what page number to display if there is more than one page. It also contains the amount of rows being displayed (default is 20) which you can increase or decrease by entering the desired amount of rows in the Rows field – or use the upward/downward arrows to increase/decrease the amount by five rows at a time.

Reorder Logs

To manually reorder logs within a container, select the log(s) you wish to move drag them to a destination log, and choose among them options in the menu that appear: move up; move down or make a reply.

Alternatively, select the log(s) you wish to move, right-click to bring up the menu and choose cut (or use shortcut key Ctrl+X). Select a destination log - in the same container OR in any other container - bring up the right-click menu and choose paste (or use shortcut key Ctrl+V) then up, down or make a reply. The log(s) will be **moved** to this destination.

If you wish to duplicate a log, you can also use the copy function. Select the log(s) you wish to copy, select copy from the right-click menu (or use shortcut key Ctrl+C). Select a destination log - in the same container OR in any other container - bring up the right-click menu and choose paste (or use shortcut key Ctrl+V) then up, down or make a reply. The log(s) will be **copied** to this destination.

When dragging one or multiple logs from one container and drop it onto another container, you are given two options: move logs and create containers from logs. When you select move logs, the selected log(s) will be added at the top of the logs list in the target container. Create containers from logs allow you to select one log, dragging it onto a destination container and a new container will be created where the log title becomes the container title. The log will be moved to this new container as well as any replies that it has.

To automatically reorder all interaction logs - either by date or by priority (status) - right-click in the logs list and choose reorder interaction logs in the menu that appears. Then make your choice between date and priority.

Date orders all logs chronologically by their creation date with oldest log at the very bottom and the newest log at the very top.

Priority orders all logs by priority icon. The higher priority the higher in the logs list (IV before I) and the statuses are ordered in the following order: To-Do before Review, then Signed I, Signed II, On-Hold, Finished, None, Not Used with Delete last.
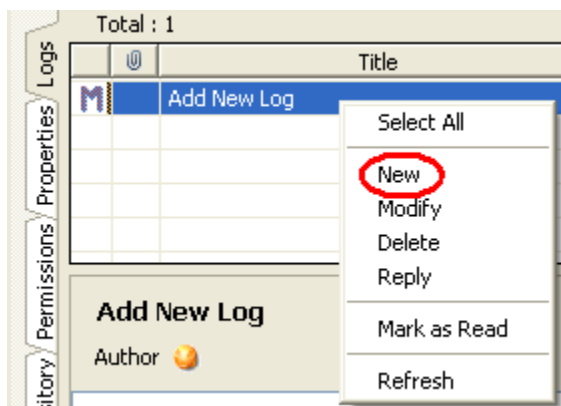
You will be asked to confirm that you really want to reorder <u>all</u> interaction logs in the container.

New Log

To create a new log, click on the New Log icon ![icon] shown below within the blue triangle.
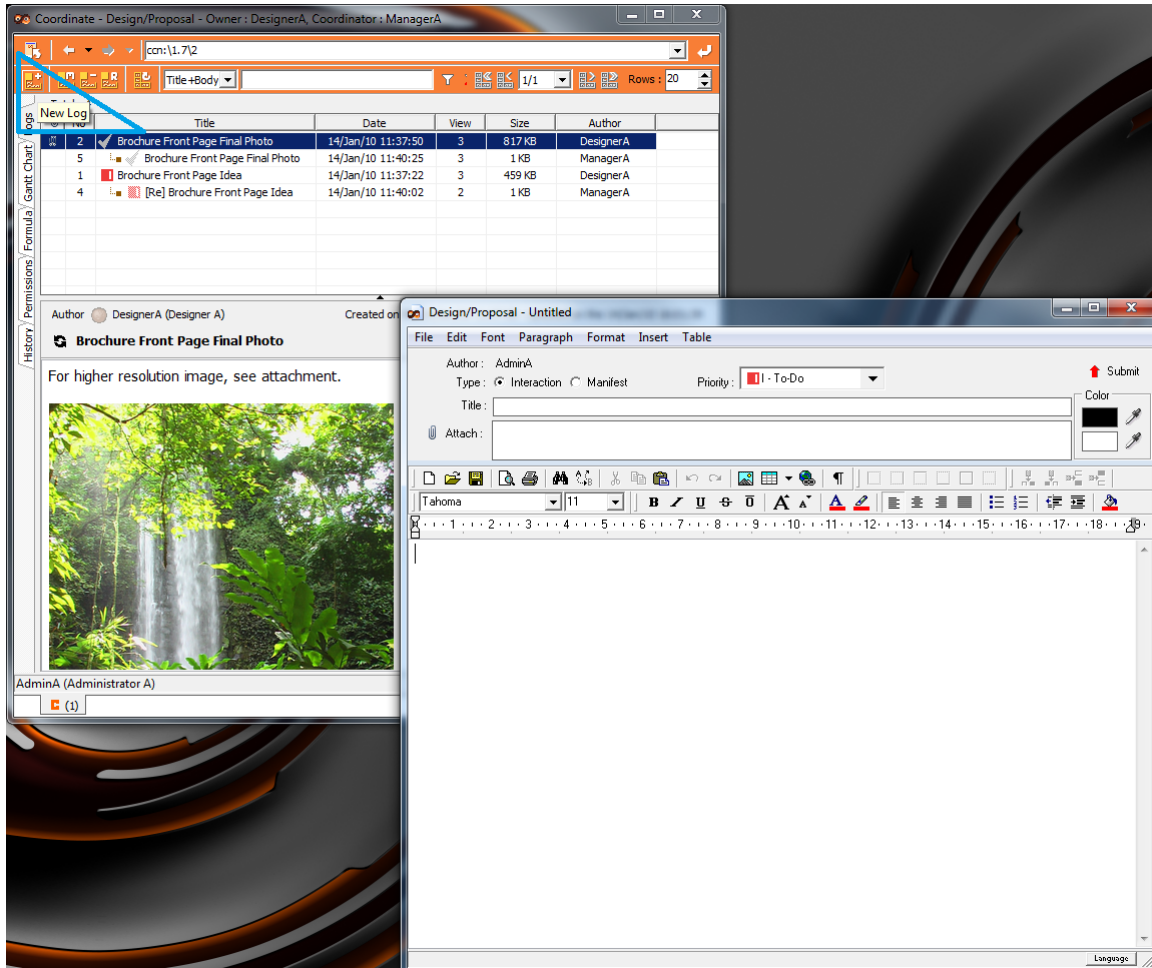
You can also place the cursor in the Log Task List on the top part of the page, right-click and choose **New** from the menu.

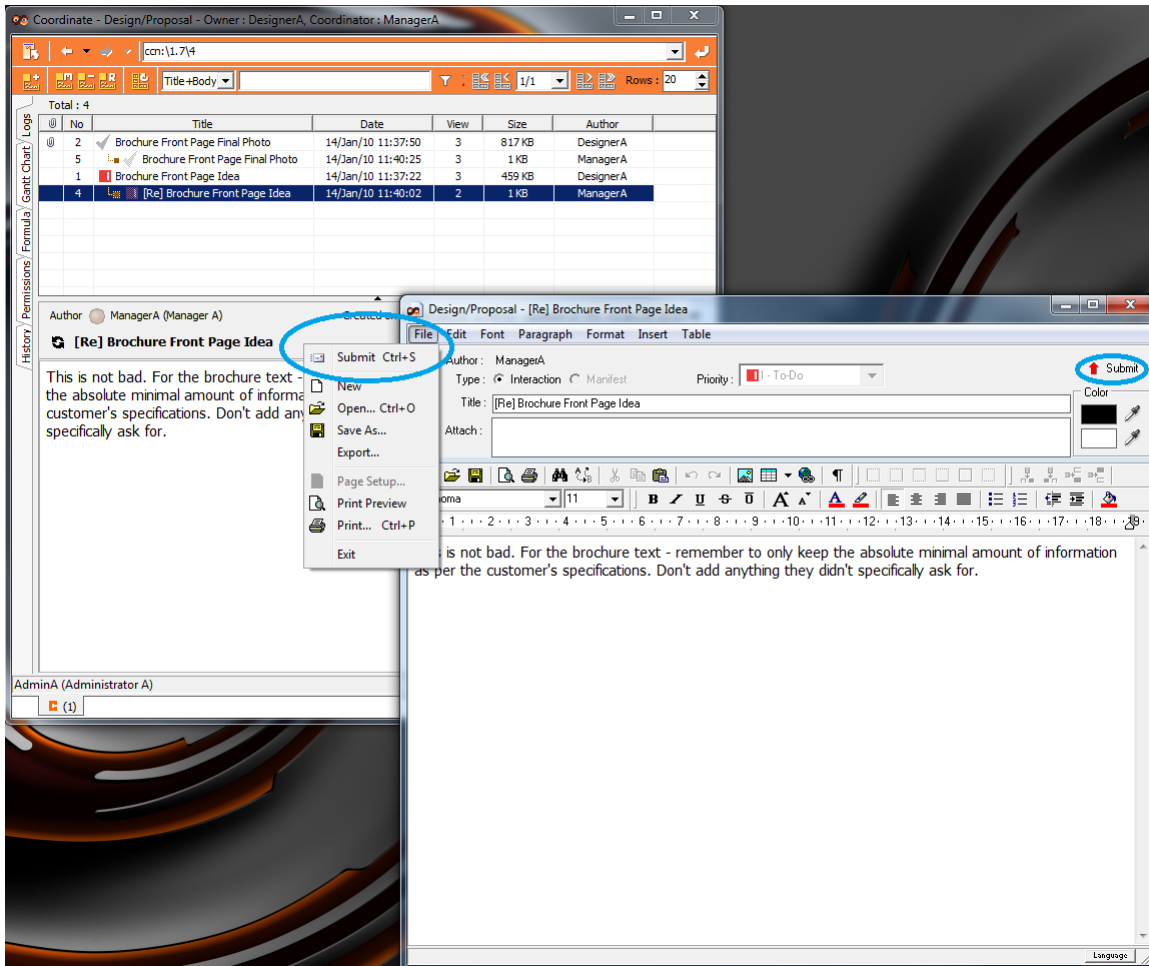Or use your Ctrl+N keys.

The New Task Log screen that appears will look quite familiar to anyone who has used e-mail. There is a title bar; space for attachments and an editing toolbar.
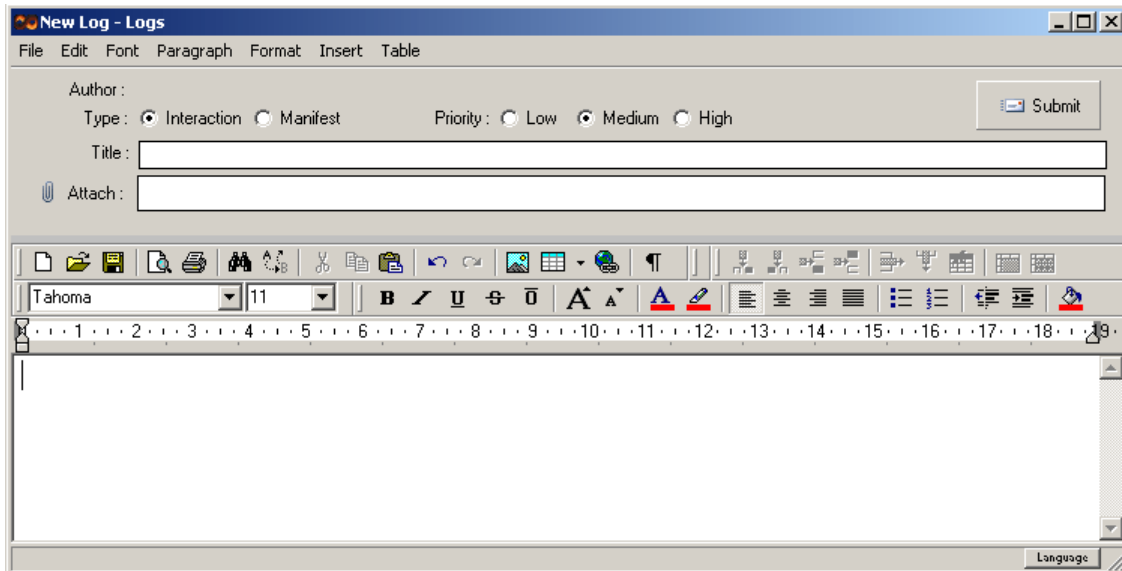
Once you have entered the text and title, you can click the "Submit" icon in the top right corner of your screen, use the Ctrl+S keys, or click on File and select "Submit" from the drop down window that appears.

It's now done and will appear at the top of the Task Log List, underneath any manifest logs.

Rename Log

To Rename An existing Log, simply right-click on the task heading, it will appear highlighted in dark blue, or use the F2 key to open the log you wish you rename. A pop up window like the one below will appear. Select rename.
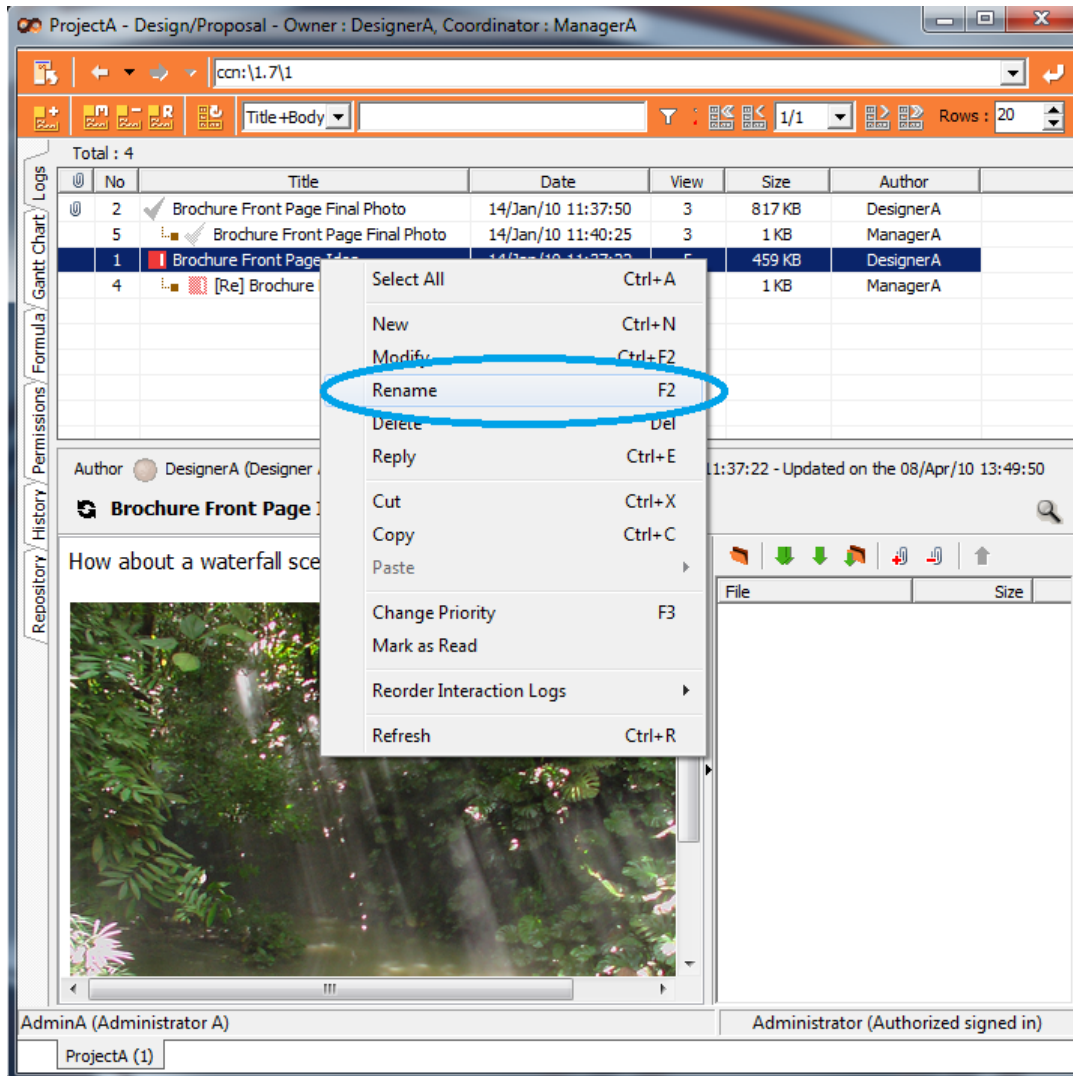
Over-type on the title line. Once you have made your changes to the log title, hit Enter.

Change Log Priority

To change the status of one or multiple logs in the logs list without opening the log(s), simply select them in the logs list then bring up the right-click menu and choose Change Priority. This, or shortcut F3, then brings up a window that lets you select a status for the selected log(s). Click OK to confirm.
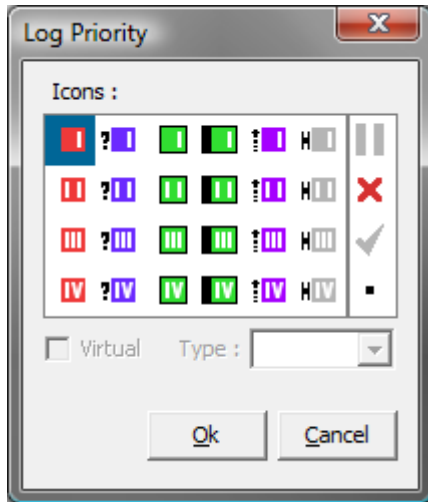
To change the priority of an open log that you are modifying, click the Priority drop-down box's downwards arrow and select one of the priority (status) icons that show up.

Modify Log

If you click on a Log that was previously created in the Task Log List you will see the Preview (which is view only).

To modify an existing log, you can either click on the Modify Log icon , indicated within the blue triangle below.

Or right-click for the drop down menu and choose **Modify**....
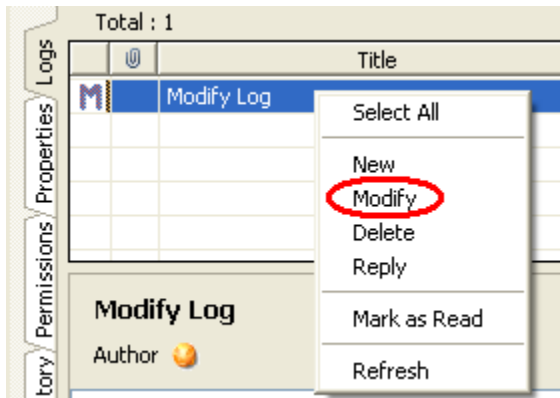
Or use your Crtl+F2 keys to open the log.

The existing message will appear in a pop up window for you to make your modifications too. Once you have completed any changes, submit your log.
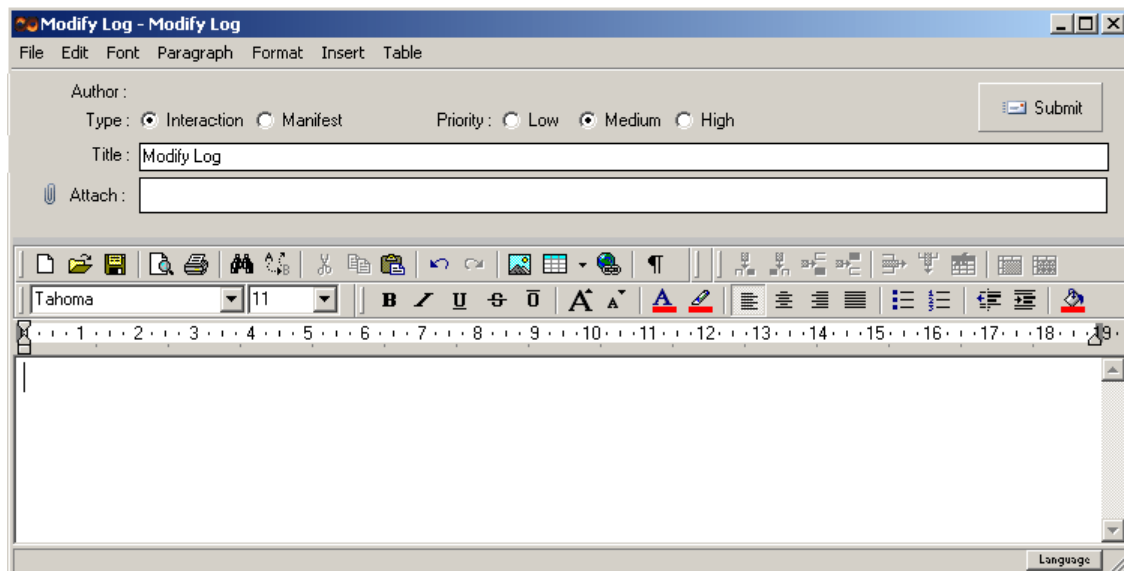
Reply Log

To Reply to a Log either choose the **Reply Log** icon: from the orange toolbar at the top of the page.
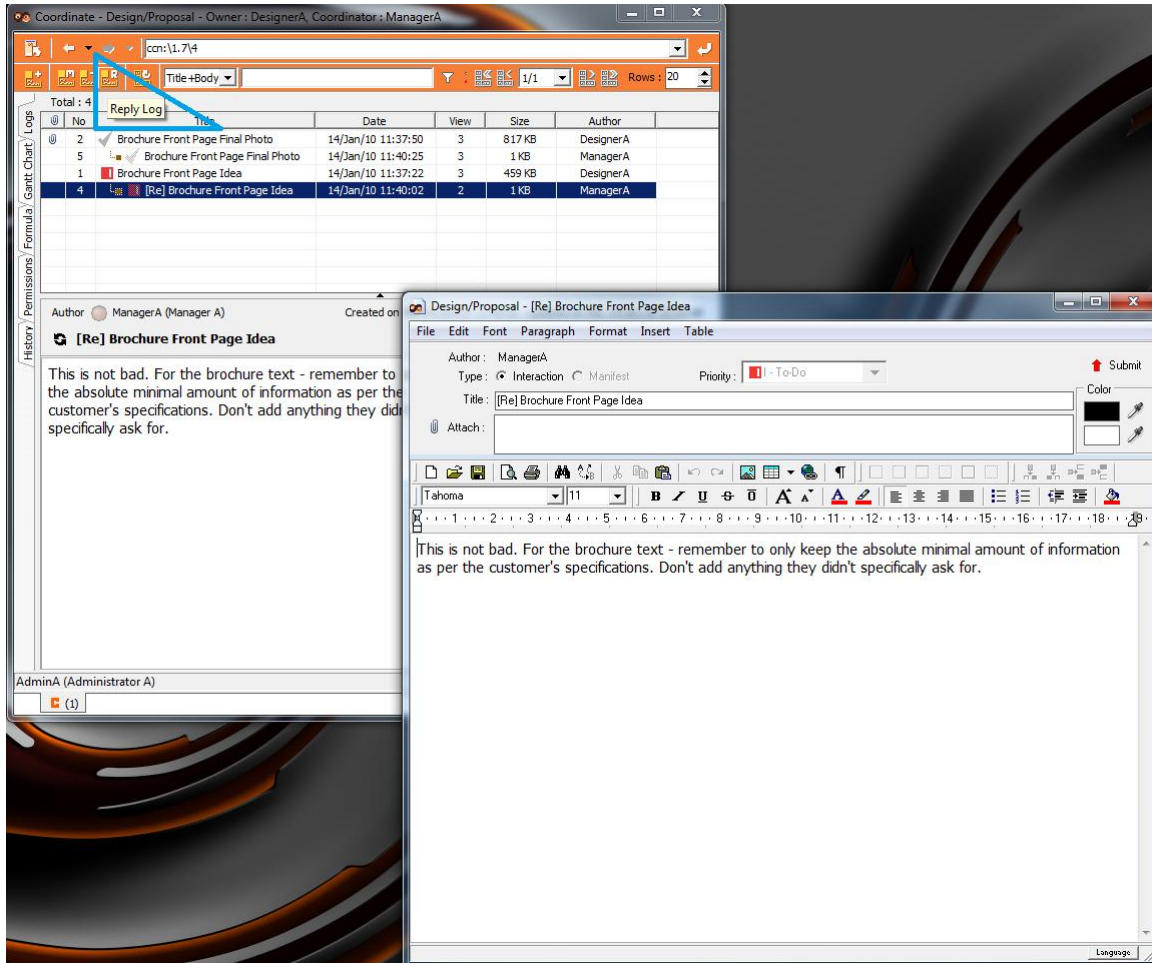
Or right-click over the Log on the Task Log List and select 'Reply' from the drop down menu.
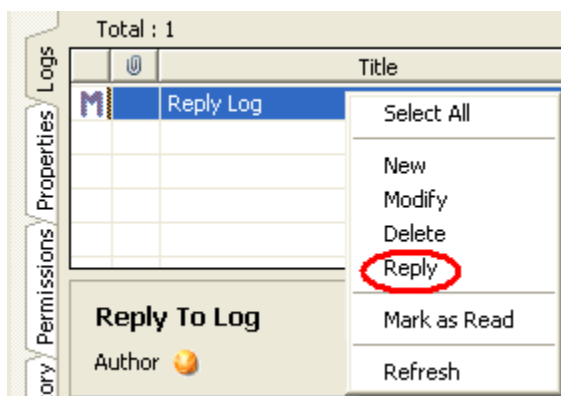
Or use your Crtl+E keys to open the log.

A New Task Log screen will appear. Write your reply then select 'Submit'. Your reply will appear as a sub-Log in the Task Log List.

To Rename a Log, simply right-click on the task heading, it will appear highlighted in dark blue, or use the F2 key to open the log you wish you rename. A pop up window like the one below will appear. Select rename.

New Log; Modify Log
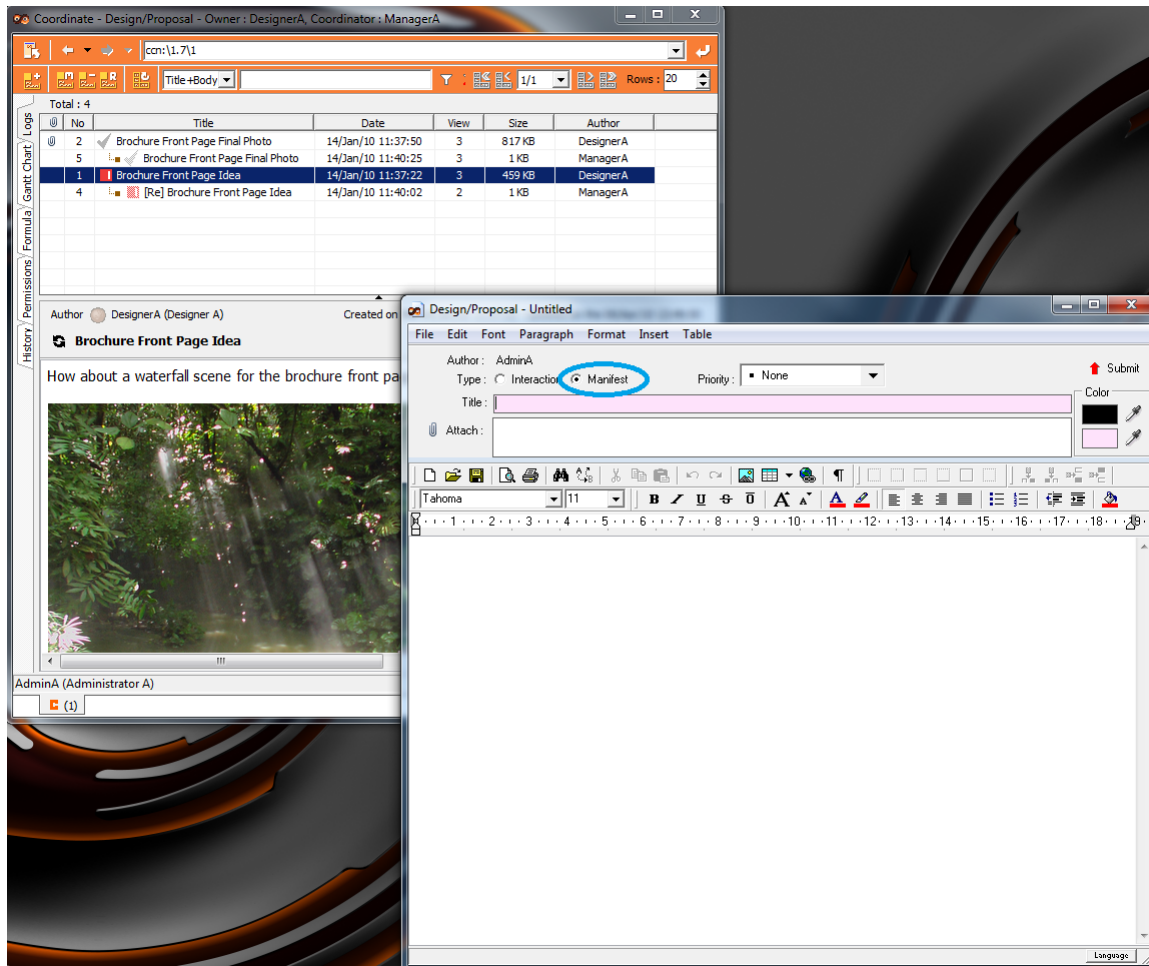
Type

At the very top you can choose whether you want the Log to be **Interactive** or **Manifest**.

Interactions can be replied to - and the latest entry will always be at the top of the Task Log List.

Manifests *stay at the top of the Task Log List page - and appear on every page if your Task Log List grown in size. They are highlighted in pink so they stand out.*

Attach

There are two ways of adding and removing file attachments: either *without opening the log* or thru an *open log* that you are currently modifying.

To add and remove attachments of a log in the logs list *without opening the log*, use the Attachment field to the bottom right of the screen.

To add a new attachment, or several new attachment files, to the currently viewed log, click the 'Queue Files for Upload' icon: ⬇️ . You then get to browse for files in a pop-up window. Once you have selected/multi-selected and clicked 'Open' in this window, these new files will be queued up for upload.

You can also bring up the drop down menu to add new attachment(s), by right-clicking in the right hand side Attachment field. Select 'Queue Files for Upload' in this menu, and you get to browse for files to add.

But maybe most conveniently, you can **drag and drop** one or multiple **files from Windows Explorer** into the attachment field to queue them up for upload.

To delete one or several attachments, from the currently viewed log, click the 'Queue Files for Delete' icon: ⬆️ . These file(s) will be queued up for deletion.

You can also select the attachment(s) you wish to delete, and bring up the drop-down menu by right-clicking in the right hand side Attachment field. Then select 'Queue Files for Delete' in this menu, and the selected file(s) will be queued up for deletion.

But maybe most conveniently, you can select the attachment(s) you wish to delete and simply hit the **Del**/**Delete** key on your keyboard, and the selected file(s) will be queued up for deletion.

To execute the changes that you've made to the attachment list (upload new files or delete files), click the **Execute Changes** icon: ⬆️ . Or bring up the drop-down menu by right-clicking in the right hand side Attachment field and select 'Execute Changes' from there.

The right-click menu also contains a **Select All** option, which is helpful when having a lot of attachments and you want to delete all of them or execute changes to all of them etc.

The right-click menu also contains a **Reload** option, which will reload the attachments view and display the files currently existing on the server.

To add attachments to an *open* log, use the box just above the toolbar. This is done by clicking on the paper-clip logo; choosing the files you want to attach from the pop-up box; and then selecting 'Open'. Alternatively you can drag and drop one or multiple files from Windows Explorer into the attachment field in the

opened log. To delete attachments from an *open* log, select the file(s) you want to delete and hit Del/Delete on your keyboard.

Submit

Once you have entered the text and **title** click the Submit button top right and it's done and will appear on the Task Log List.

Toolbar

Most of the toolbar functions that appear in 'New Log' and 'Modify Log' mode will be completely familiar to anyone who has used e-mail or a word processing program.

Some of them will remain 'grayed out' until their functions can be used (for example to use any of the functions that have to do with Tables, a Table has to be created first).

On the top toolbar if you run the mouse over the buttons from left to right you will find:

New Document; **Open Document**; **Save Document**; **Print Preview**; **Print**; **Find**; **Replace**; **Cut**; **Copy**; **Paste**; **Undo**; **Redo**; **Insert Picture**; **Insert Table**; **Hyperlink**; **Non-Printing Characters**; **Left Border**; **Right Border**; **Top Border**; **Bottom Border**; **All Borders**; **No Borders**; **Insert Column Left**; **Insert Column Right**; **Insert Row Above**; **Insert Row Below**; **Delete Rows**; **Delete Columns**; **Delete Table**; **Merge Cells**; **Split Cells**

On the lower toolbar you will find:

Font Style; **Font Size**; **Bold**; **Italic**; **Underline**; **Strikeout**; **Overline**; **Increase Font**; **Decrease Font**; **Text Color**; **Text Background Color**; **Align Left**; **Center**; **Align Right**; **Justify**; **Bullet Points**; **Numbering**; **Decrease Indent**; **Increase Indent**; **Paragraph Background Color**

Below this is the tab/indent/page edge ruler.

Most of these functions will need no explanation. However Hyperlink and Insert Picture are detailed below.

Hyper Link

Sometimes it's useful to be able to Link between logs in Continuity or to Hyper-Link to outside websites and this icon 🌐 - roughly central on the top toolbar - is the one to use.

Just follow these steps.

Go to the Continuity Document or Website etc that you want to be the destination of the Link, select the address path, right-click and choose 'Copy'.

Return to Continuity (if not there already).

Open the relevant Task Log.

Choose **Modify** from the drop down menu.

Place your cursor in a blank part of the screen where you want the start of the link to be.

Click the Hyperlink icon: 🌐. The following box will appear.
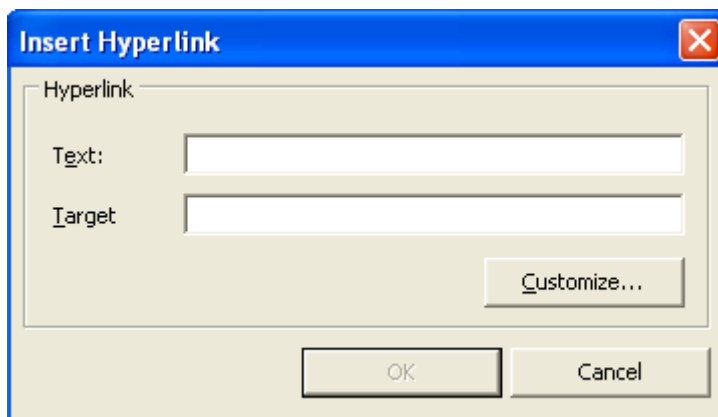
Put your cursor in the Target field, right-click and select 'paste' from the drop down menu to insert the address path you have already selected (or, if you prefer, you can enter it manually.)

Then place your cursor in the Text field and type the text you want to be the start of the hyperlink.
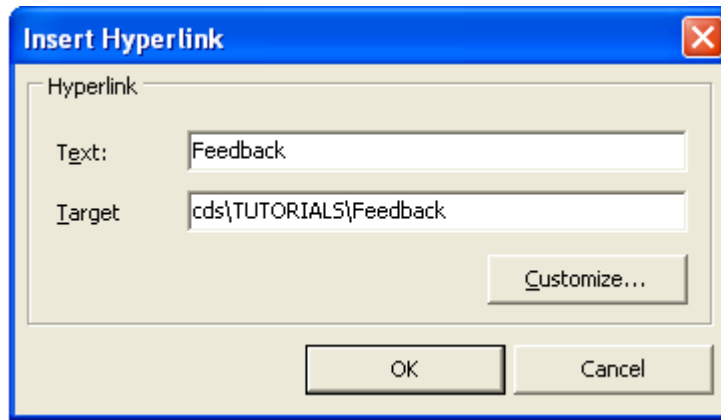
Then choose 'ok'. The text you typed in the Text field will appear in your document as the start of the link - like this: Feedback

It appears differently so it can be immediately identified as a hyperlink. If you want you can choose the customize key to select different text and background colors.

Now, from Preview mode, if you click the hyperlink you will be taken to the relevant document/website etc.

(**Note**: The Link only works from the 'Preview' Log screen - e.g. View Only mode - when in Modify Task Log clicking on the link does nothing as it assumes you are about to edit the text!)
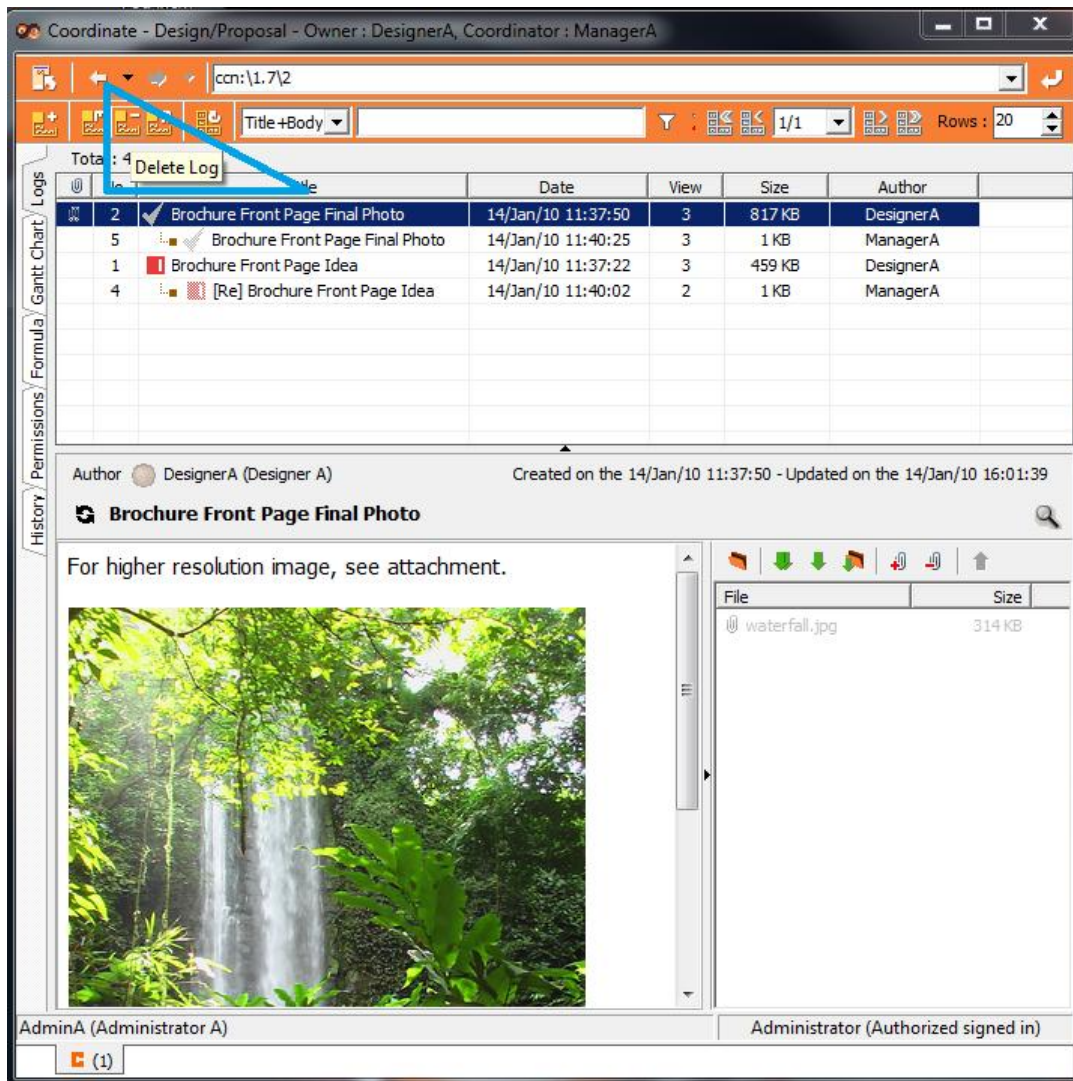
Insert Picture

Click this button and a box comes up from which you can select the file that contains the image you wish to insert.

Go to the relevant file containing the image, and double-click the file name and the image will automatically be inserted.

Delete Log

To delete an existing log, first select (or multi-select) the log you wish to delete by clicking on it. It will become highlighted in dark blue as the example below shows. Then click the Delete Log icon 📇, indicated within the blue triangle below.

As an alternative to delete the log(s), you can use the right-click menu within the log list and select the Delete option.
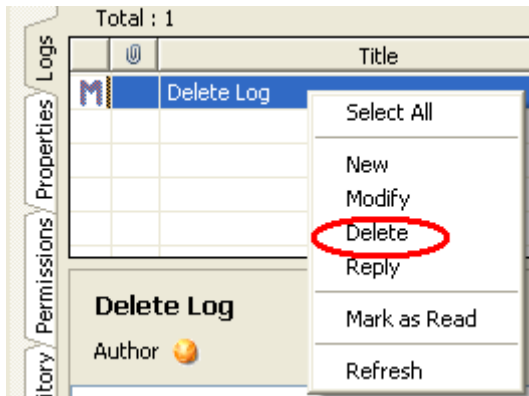
Or simply use the Del key. Whichever delete option you opt for, you will be asked to confirm whether you wish to delete the log with a Yes or No option, like the one pictured below.
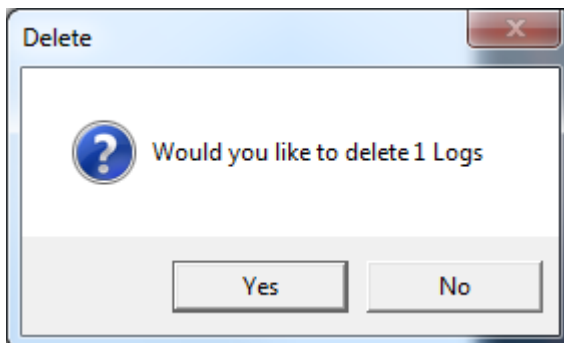
Reload Preview

To reload the Preview field only (the bottom left part of the Log View) click on the **Reload Preview** icon: in the orange toolbar at the top of the page.

Refresh Task Log List

To refresh the Task Log List click on the **Refresh Task Log List** icon: in the orange toolbar at the top of the page.

Select All

To select all the Logs in a Task Log List place the cursor in the list; right-click - and choose **Select All**.
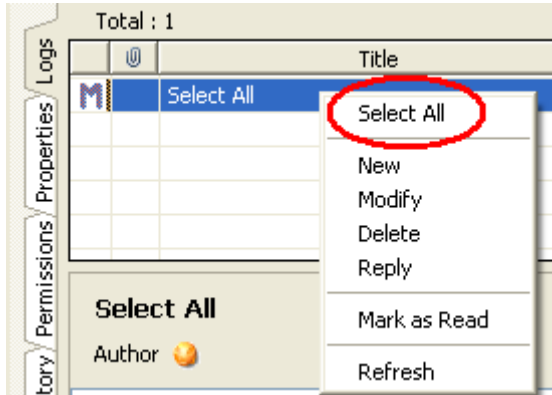
This can be useful if - for example - you want to **Delete** many Logs in one go.

...Or if you wish to mark them all as having been read (**'Mark As Read'**) without having to mark each Log independently.

Mark as Read

To Mark a Log as having been read without your actually opening and reading it - thus removing the bold type so it no longer stands out - select/multiselect the Log(s) in question; then right-click and select **Mark As Read**.
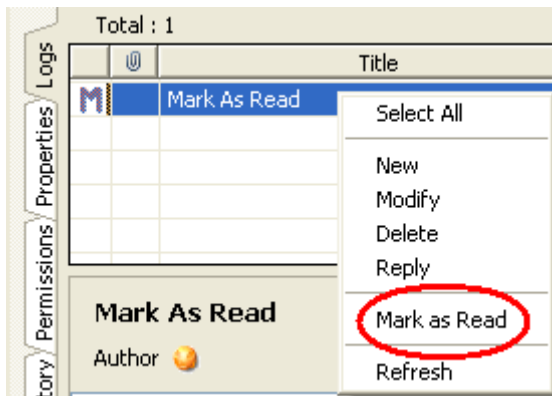
Copy (Preview)

Select the contents you wish to copy of a Log (**text** and/or **images**) in the Preview window at the bottom half of the Log View. The **Select All** option available in the right-click menu proves useful in case you wish to copy all the contents of the Log.

Once selected, right-click and select **Copy** in the menu that appears. Thereafter the text and or images are stored in your system buffer, and you are able to paste it into the desired target.

To **Copy a Single Image** need further explanations. To do so select the image, which you wish to copy, by double-clicking it...

...you will then see a faint colored frame appearing around the selected image, like this:
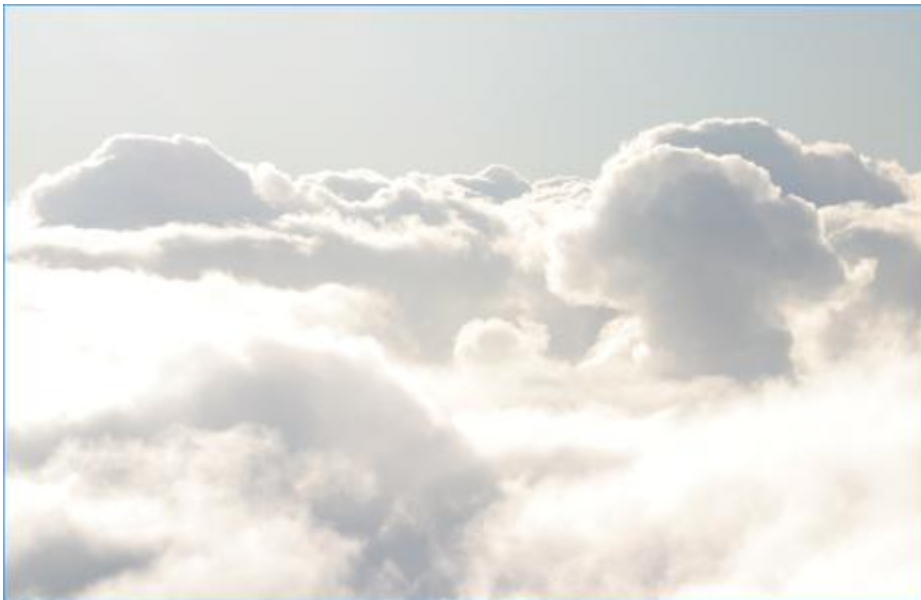
Note that on images that are darker than this example, the frame can be hard to distinguish. The frame is, however, always present at this stage, and its appearance so allows you to right-click within the image's frame, and to select **Copy** in the menu that appears.

Important now is to wait two to three seconds before switching to another application as this interrupts the copying-process. Thereafter the image is stored in your system buffer, and you are able to paste it into the desired target.

Select All (Preview)

To select all the contents of the Log (text and/or images) in the Preview window at the bottom half of the Log View, simply right-click in this window. Choose **Select All** in the menu that appears and it will all be selected.

This way it is easy to thereafter Copy all the Log's contents to your computer's buffer.

Gantt Chart

The Gantt chart can be used to plan and schedule projects, and shows time periods and goals displayed as a time line.

By clicking the Gantt chart tab, the **Viewer Window** changes into one; the right hand screen becomes an extension of the Tree where the Tasks' time periods and points in time are visually displayed in a time line...
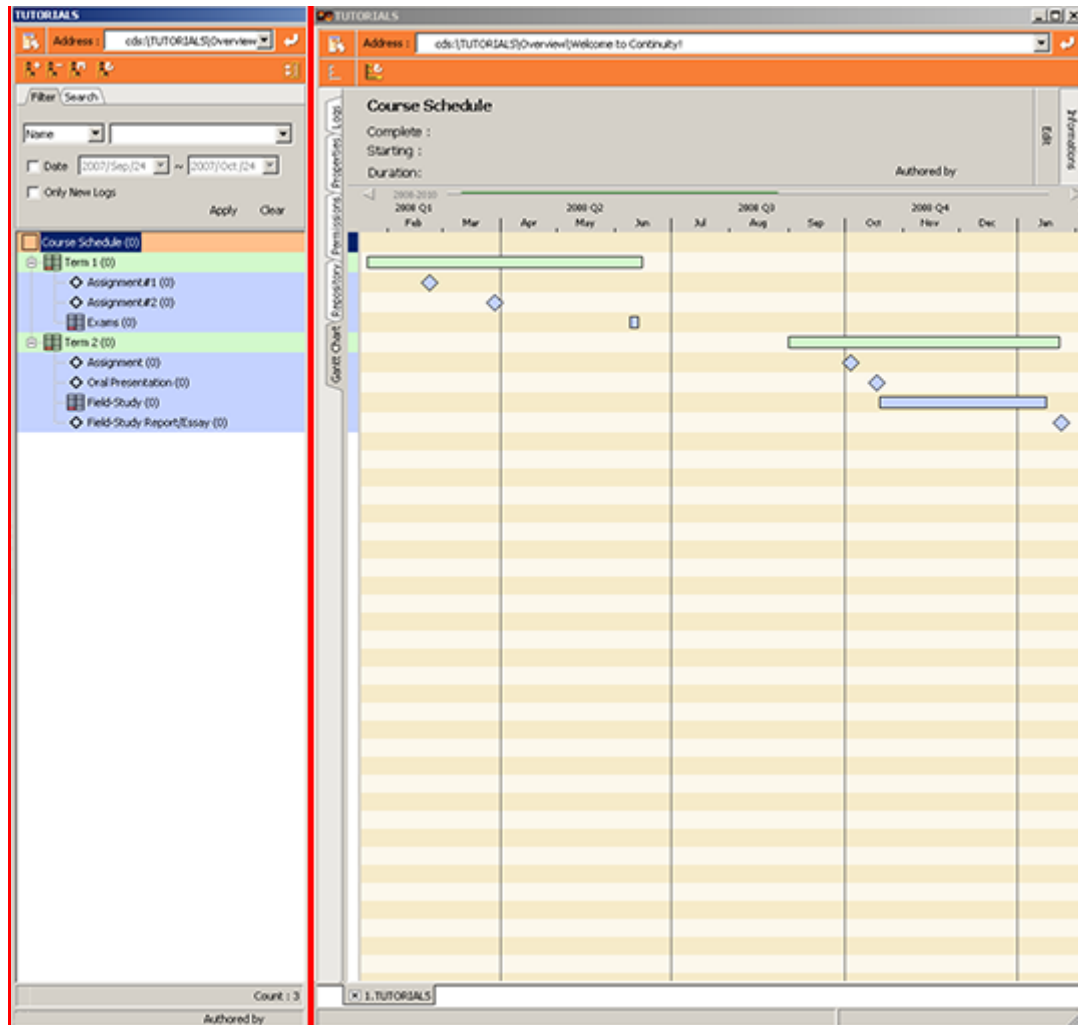
The idea is that the Gantt chart works as an extension of the **container tree**. While you are in the Gantt Chart View if you wish to include/exclude certain Tasks, go back to the Tree and make a new selection. The Gantt chart will consequently refresh.

Move/Zoom

The bar which displays time at the top of the Chart, the **Calendar Bar**, is used to control what time period is displayed on screen.
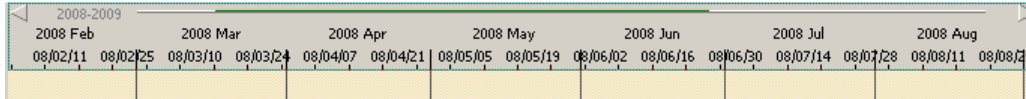
If you wish to **move in time**, simply position the cursor in the Calendar Bar and drag it left and right. By simultaneously pressing the 'Ctrl'-key, **zooming time** is done the same way.

By right-clicking in the Calendar Bar you also have the following pre-set options to **move** in time...

...and the following options to **zoom**...
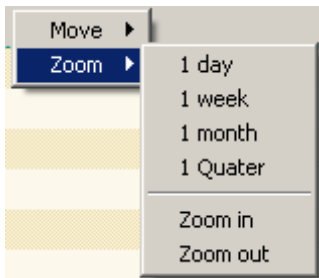
To move/zoom more precisely the 'Time Line Navigation' option on the top right of the Gantt Chart View is the best tool...
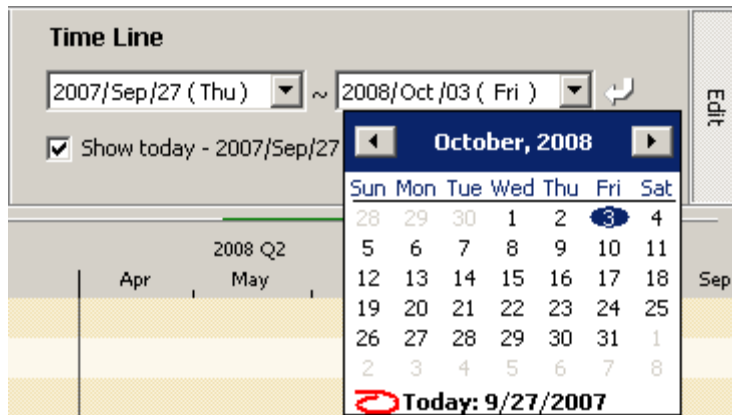
Here you can set an exact start date and end date for the displayed Time Line. This is done either by entering the desired date directly in the field, or by bringing up the true Calendar and picking a date. By clicking 'Today' at the bottom of the calendar, today's date will automatically be selected. Once you're happy with your time interval, hit enter on your keyboard or the enter-arrow-icon to the right.

A specific time interval can also be selected; an 'x' amount of week(s), month(s), quarter(s) or year(s) from a specified start date.

Edit Task

By default any changes that you make to the Gantt chart are automatically uploaded to the server every five seconds, so that you con continuously work in the Gantt chart view without having to save your changes all the time. If you want to shorten or prolong these five seconds – or turn auto save off completely – see the Gantt chart section under the Options in the Tools-menu. If you make a mistake while you are editing the Tasks in the Gantt chart, hit the refresh icon: 📋, this will take you back to the last uploaded settings.

If you do not use auto save you need to manually upload changes made to the Gantt chart, for instance after you have edited one or several Tasks. To do so simply click the upload icon: 📋.

To literally **move a Task in time** in the Gantt chart time line, first make sure that the Edit Mode tick-box is checked. By default it is off to prevent tasks to accidentally be moved. Then simply position the cursor on the time bar or the diamond symbol that you want to move and drag it horizontally on the screen.

To **modify the start and/or end date** of a time period, each bar's end can similarly be 'dragged' horizontally (as long as the Edit Mode tick-box is checked). This way the Task's time period can be extended or shortened.

To edit a Task's time attributes more precisely, the edit option on the top left of the Gantt chart window is the best tool.

For Tasks that are of a 'point in time' type, its specific date can be edited by using the start date field to the left. Here you can also set an exact start date and deadline date for a Task, which is a time period. This is done either by entering the desired date directly in the field, or by bringing up the true Calendar and picking a date. By clicking 'Today' at the bottom of the calendar, today's date will automatically be selected. Once you're happy with your selection, hit enter on your keyboard or hit the enter-arrow-icon to the right.

Working Days

By default the Working Days option is selected, which automatically takes into account weekends and Period Blocks (see below). To use this feature, make sure the Workings Days box, indicated below circled in blue, is checked and enter an amount of days in the field or use the arrow up/arrow down buttons, situated underneath the Working Days selection box, to allocate the number of days required to the task.
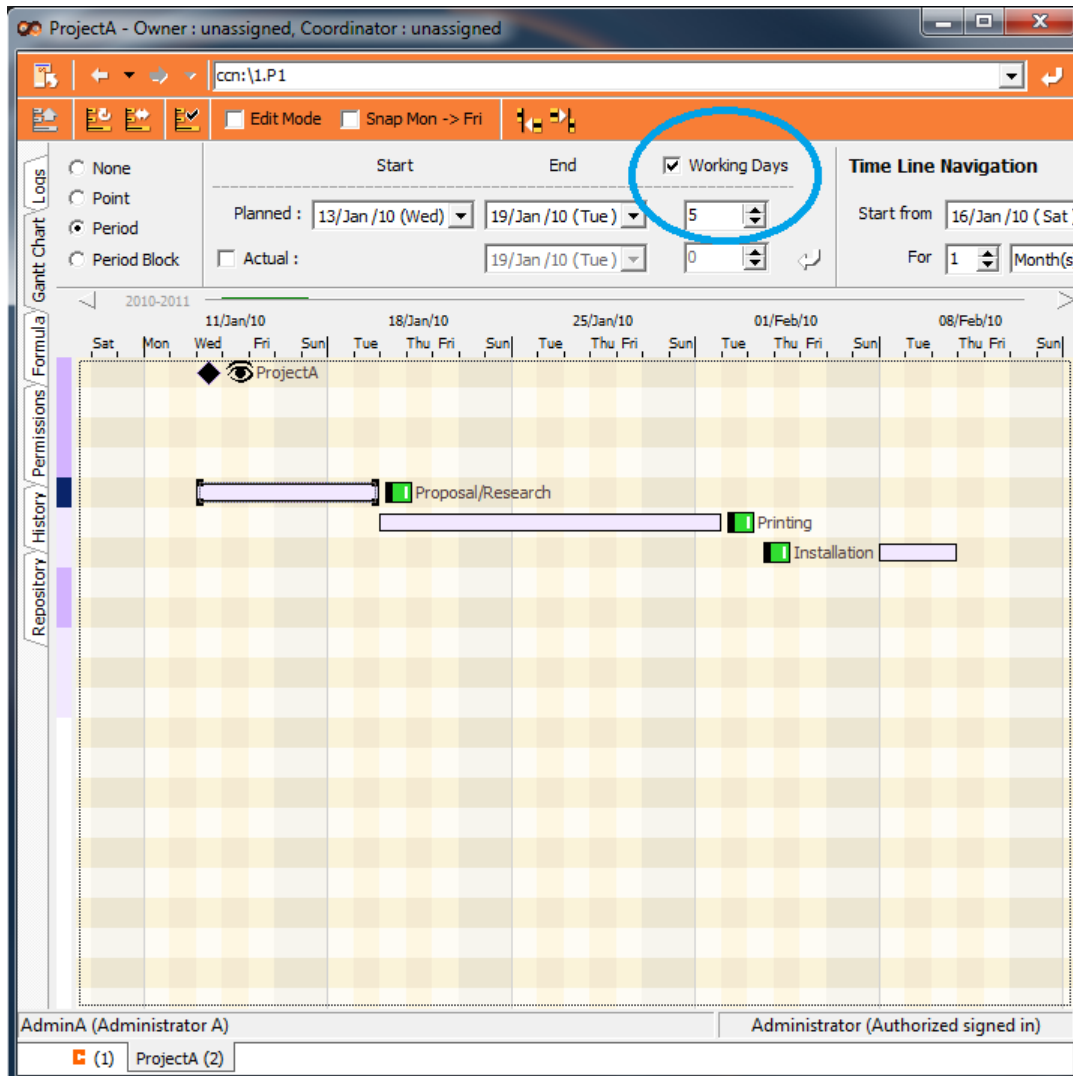
Actual

To enable you to track estimates versus actual for tasks that are of a 'period' type, you can select the Actual option, shown below circled in blue.

This allows you to enter an amount of working days or use the arrow up/arrow down buttons, situated below the number of working days, to allocate the amount of time the task took. Once you're happy with your actual value, hit enter on your keyboard or hit the enter-arrow-icon to the right.

The Actual time taken appears on the Gantt chart as a solid black line if the task is completed within the allocated time ▬▬▬▬ , or in red, if completion happens after the planned end date.
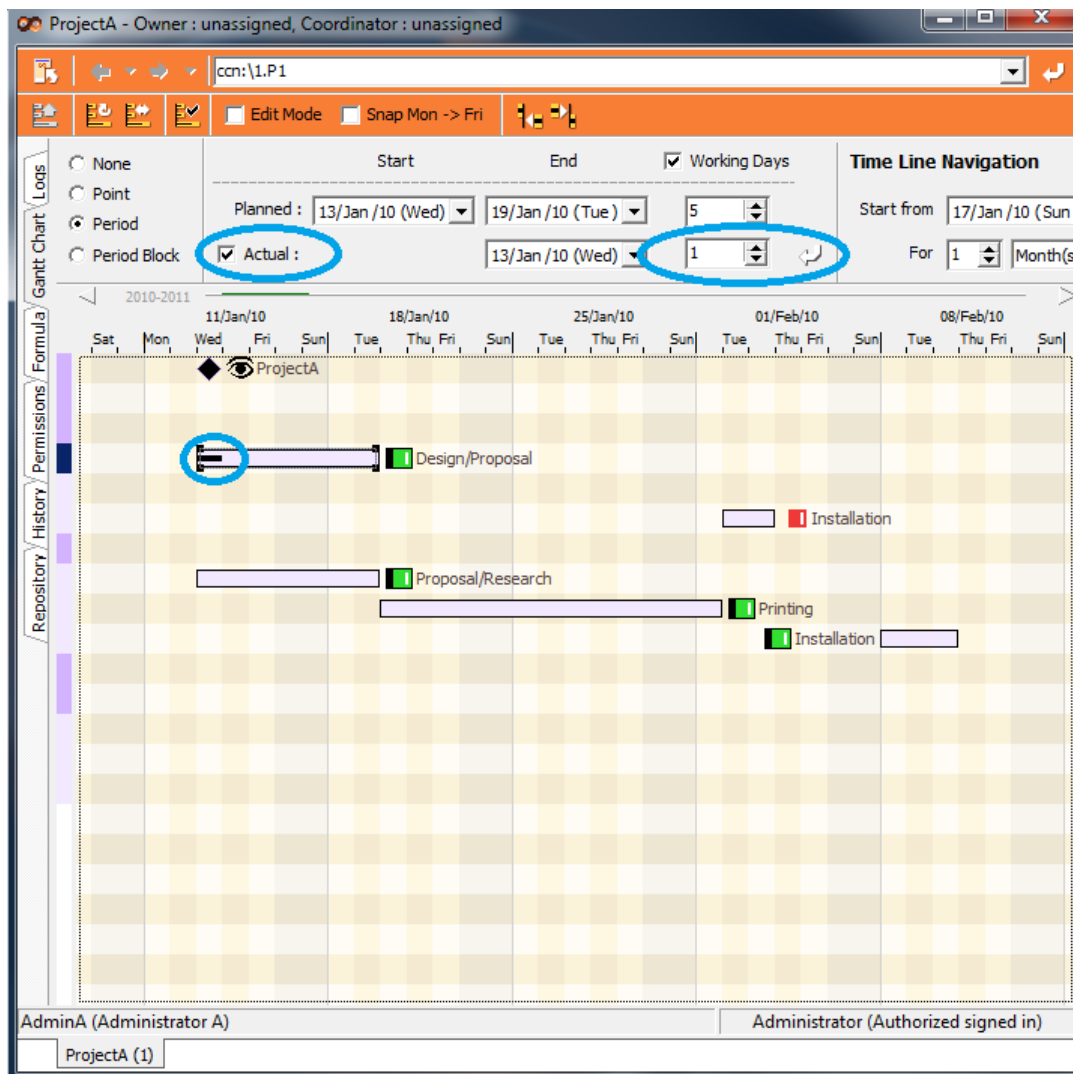
Gantt Chart Types

There are five different Gantt chart types: None, Point, Period, Period Block and Period Summary.

<u>None</u>: If the task does not require a timeframe to be set, then select the None option to the left hand side of the screen, shown below circled in blue. If None is selected, then the task will <u>not</u> appear on the Gantt Chart.
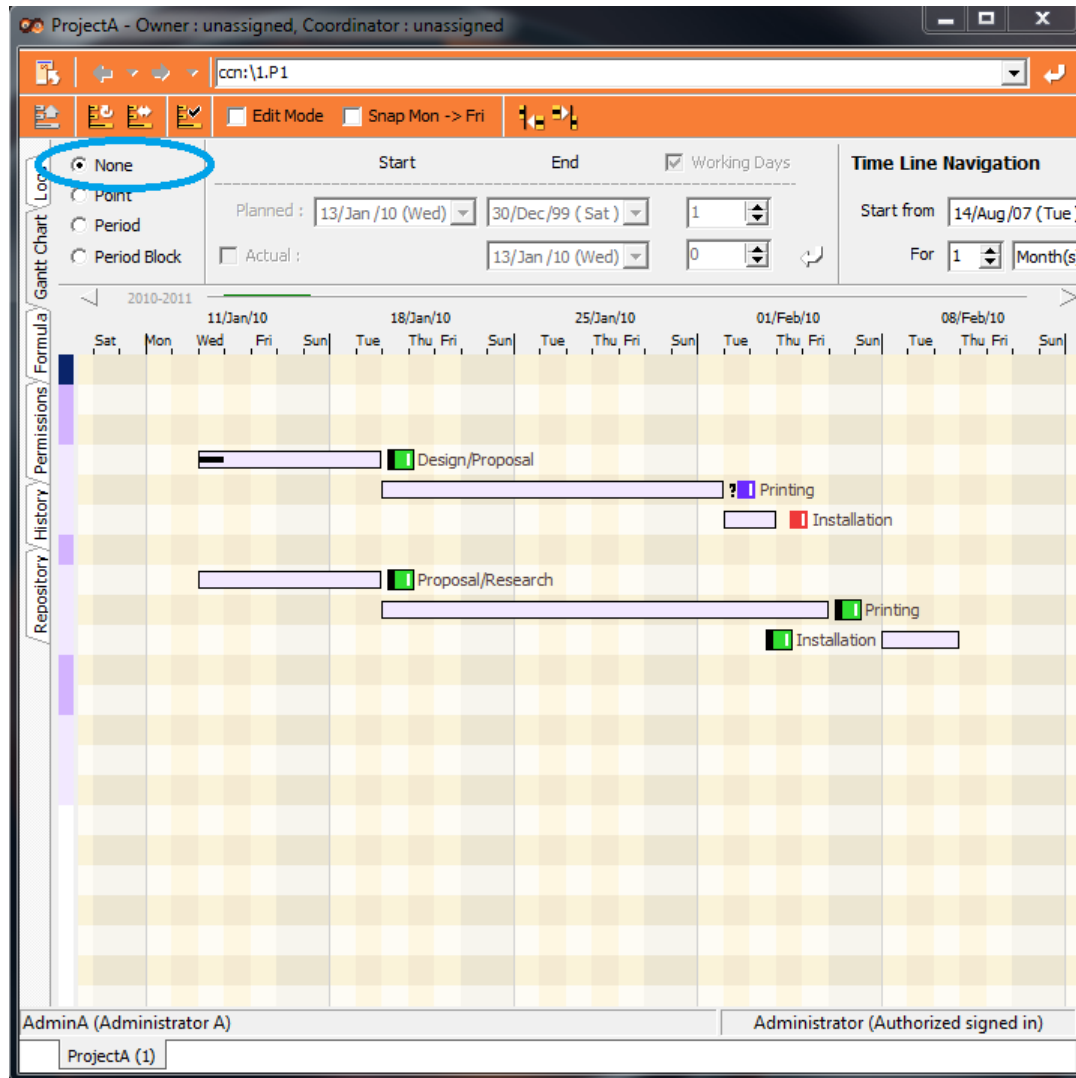
<u>Point</u>: When the task has a specific point/date (like the example below shows the start date for "Project A" as a Point) you can select the Point option. This point stands out whether it is by your selection of icon, the container's font color and/or the large diamond shaped dot ◇ .
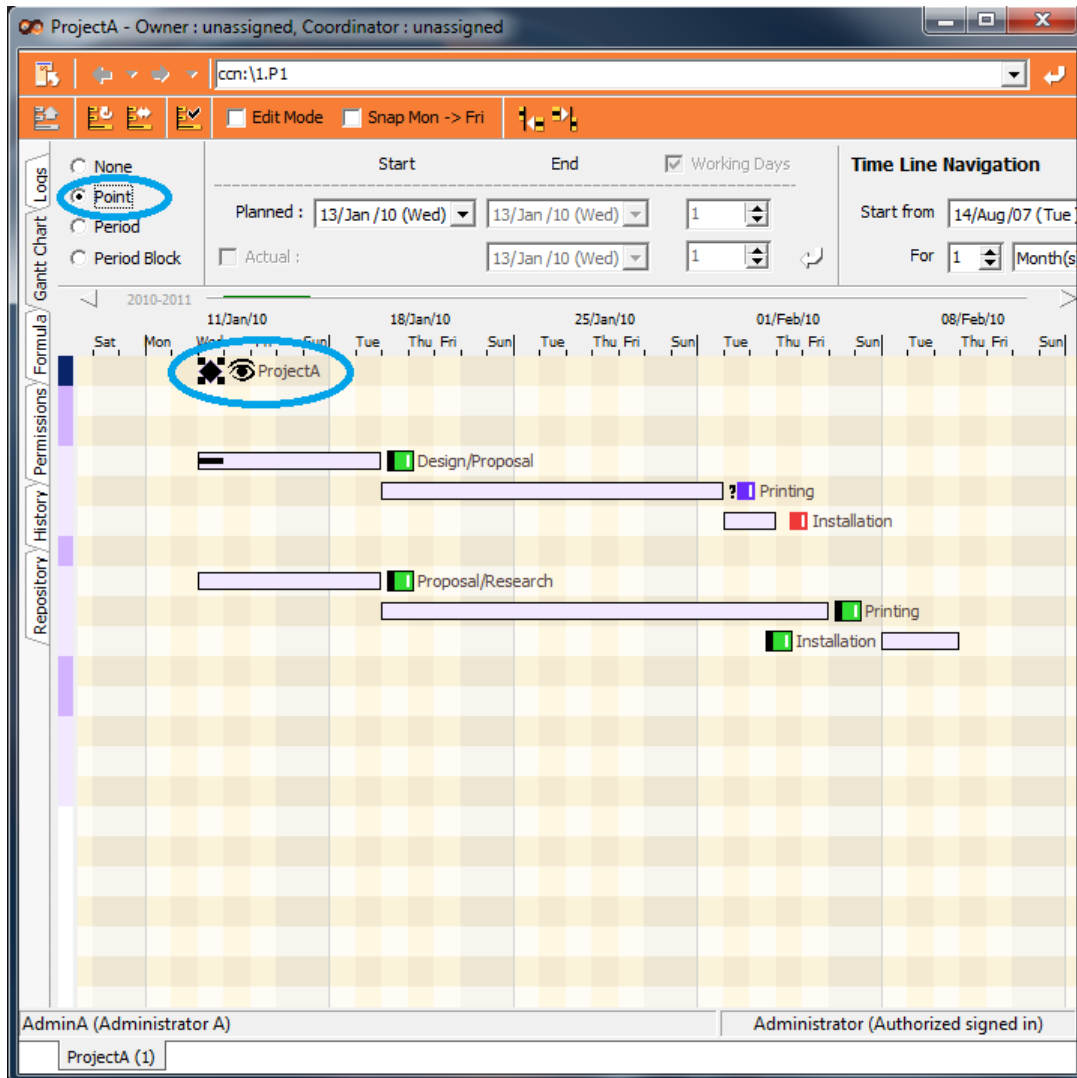
<u>Period</u>: If the task has a specific time period that you would like to keep track of, select the Period option. To select the start date, use the drop down option underneath the Planned Start box. Then enter the planned end date by using the drop down option underneath the Planned End box. All Period tasks appear on the Gantt Chart visualized as a bar ▭ and the length of this bar depends on its duration.
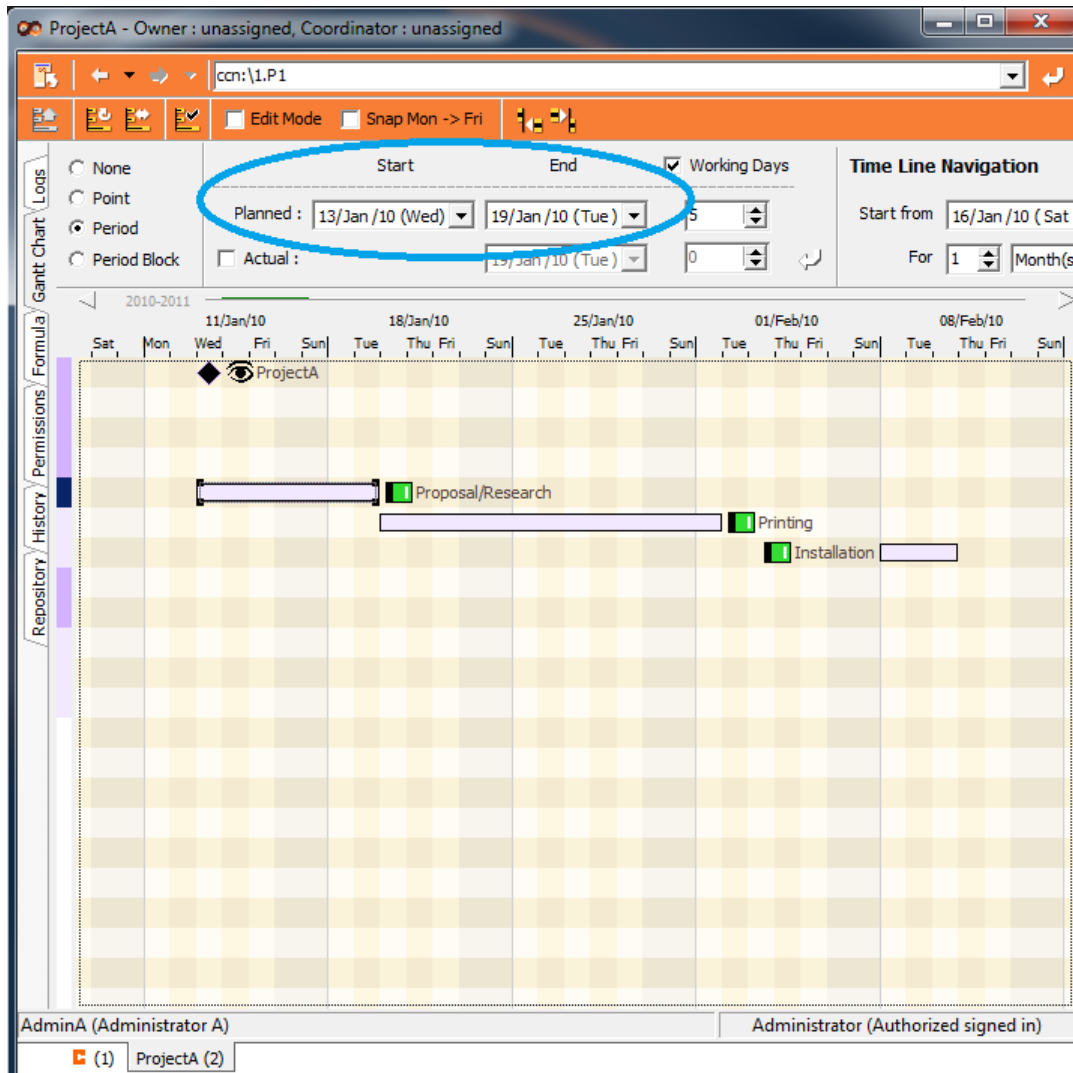
Period Block: A Period Block is the same as a Period, however the Period is never moved when the user utilizes any of the Line Up Tools (see below). Period Blocks are therefore very useful in instances such as statutory holidays, as they do not line up when using the Line Up tools. Instead, if any containers that have the working day option ticked happen to overlap with a Period Block (and the User uses the Line Up tool), the container's period extends as if it is a weekend, taking the holiday into account when calculating the end date.

To assign a period block to a task/container, simply select the circle shown below.
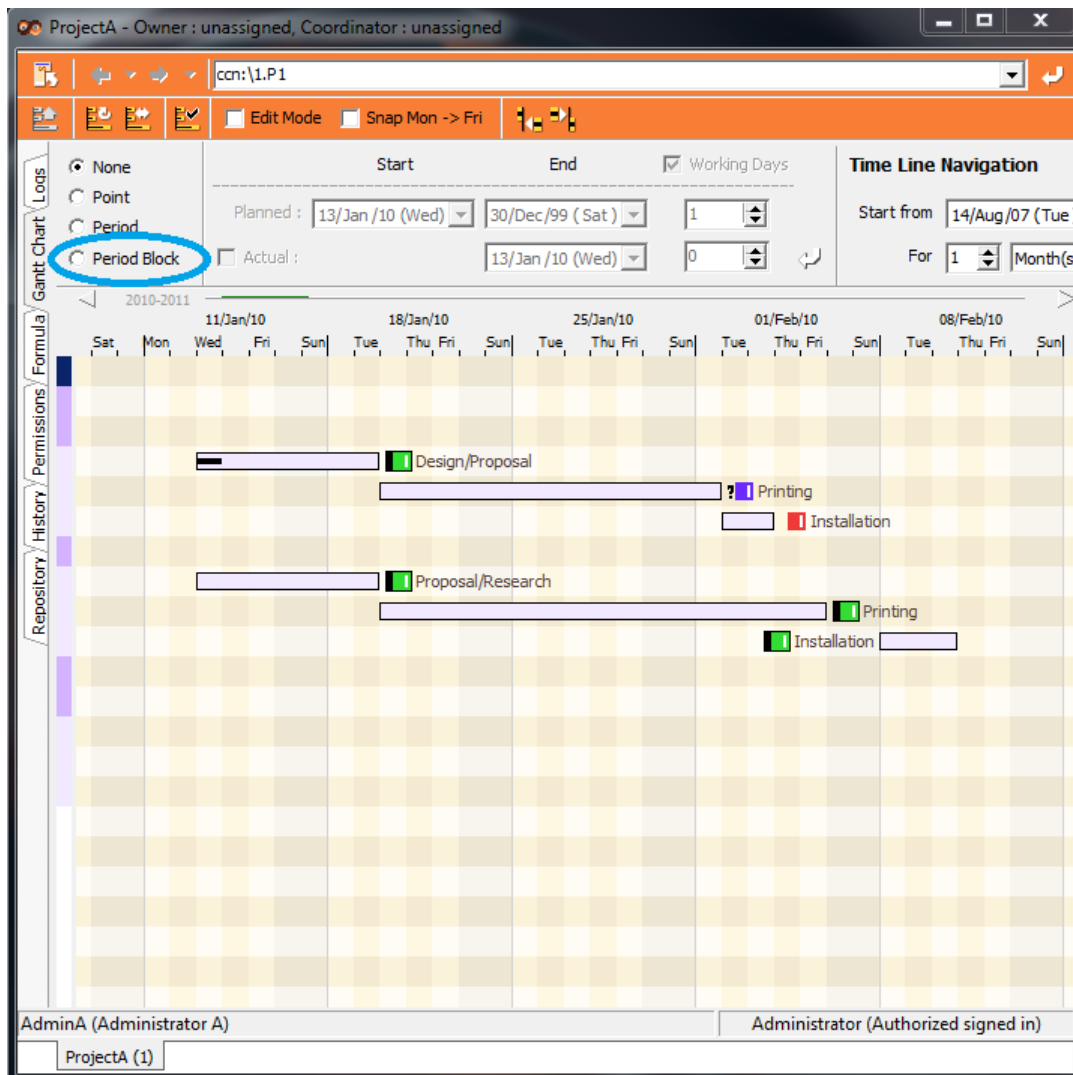
Period Summary: A good way of creating a particularly overseeable Gantt chart is to set a number of key containers to the Summary Period type. Such a container is displayed as a bracket summarizing its sub-containers. The summary bracket starts on the same day as the sub-container with the start date furthest back in time. Similarly, the sub-container with the end date furthest ahead in time is used as that of the summary bracket.

Period Bar Line-Up

With a number of containers ordered by Gantt date (either manually ordered or even easier automatically using the "reorder sub-containers by Gantt" options - see the Reorder Container(s) sections for Project View and Coordinate View), the period bar line-up tools are very useful for quickly setting the Gantt chart up. There are two tools:
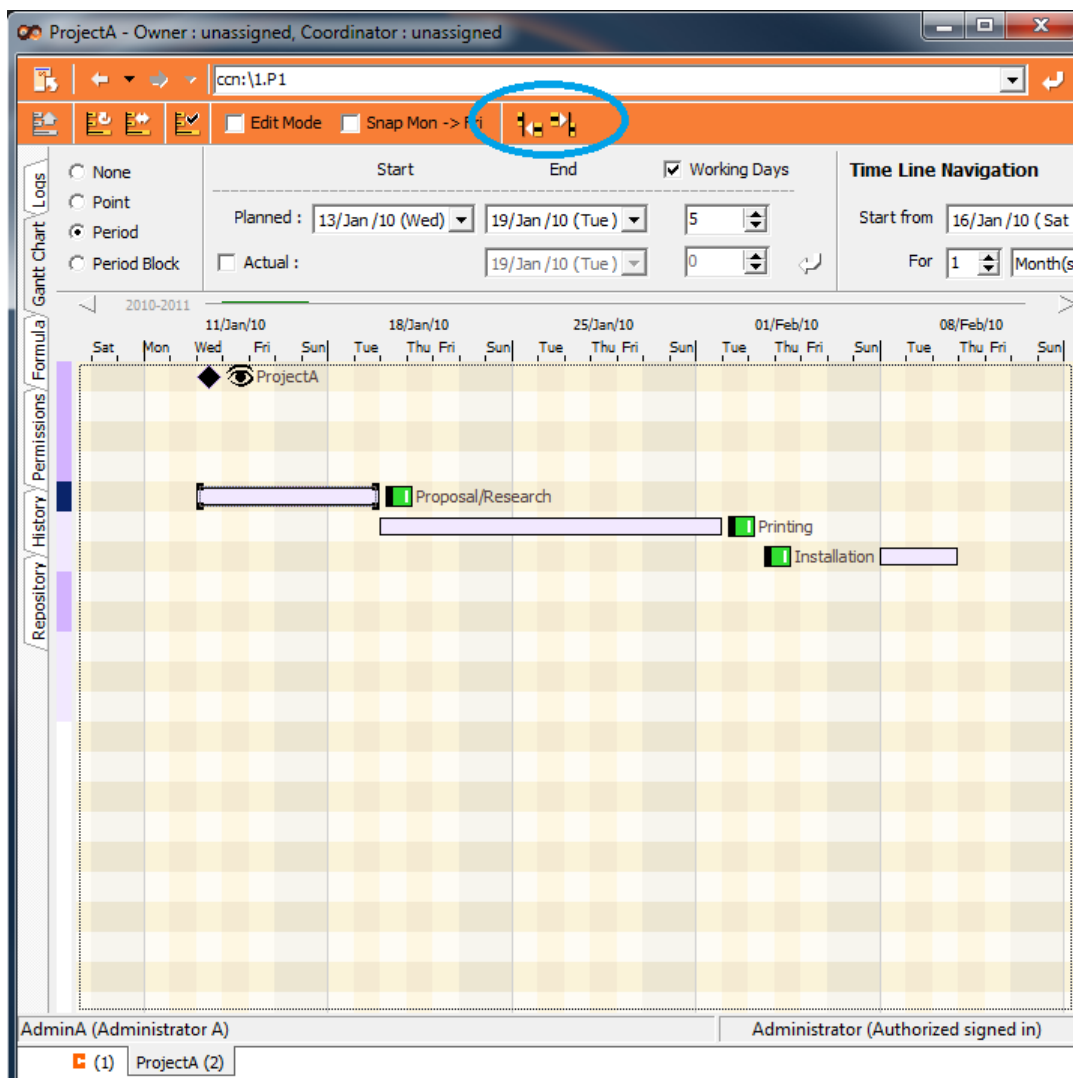
Based on Start Date

To use this option, select the containers that you want to line-up. To define a target container whose *start* date will be used for the line-up, make this the last selected container in the container tree. The last selected container is always highlighted in dark blue as opposed to the light blue of the rest of the selection. With this selection, press the left of the two line-up icons encircled in blue above. The selected containers will automatically line up one after the other based on the *start* date of the last selected - target - container.

In the case of one of the period bars ending on a Friday and you would like the next one to line up to start on the following Monday rather than Saturday - check the 'Snap Mon -> Fri' tick-box.

Based on End Date

To use this option, select the containers that you want to line-up. To define a target container whose *end* date will be used for the line-up, make this the last selected container in the container tree. The last selected container is always highlighted in dark blue as opposed to the light blue of the rest of the selection. With this selection, press the right of the two line-up icons encircled in blue above. The selected containers will automatically line up one after the other based on the *end* date of the last selected - target - container.

In the case of one of the period bars starting on a Monday and you would like the previous one to line up to start on the previous Friday rather than Sunday - check the 'Snap Mon -> Fri' tick-box.

Formula

All formulas are set up by the administrator on the server console based on container types.

For those container types used in one or multiple formulas, the columns defined by the administrator are displayed under the spreadsheet-style formula tab on the client. Most of the column cells can then be filled out on the client to supply the formulas with different values. The results are displayed either per column in the top field or in the right-most field called Global Formulas. Global formulas are very powerful as they allow for calculations involving more than one container type.

Permissions

Permissions have been designed to allow different user's access to varying information.

There are two permission **zones**: one more restricted green zone which requires each client to register a key on their system and one less restricted red zone which does not require any key registration. Keys are distributed by the administrator from the server. By allowing the same user or group access to different data for the different zones; more sensitive data can be limited to be used only in the office by registering a key on the office computer system, whereas less sensitive data can be accessed from anywhere: from a laptop, a home system or even from an Internet cafe.

The Permissions View accessed by the fourth tab down on the left hand side, shows the user what permissions they have been granted for the container currently selected in the tree window. The legend called **My Permission** lists the various permission categories that you can be granted. As you can see there are many different kinds of access - e.g.: read-only; creating your own tasks; modifying other people's tasks - and the top level after administrators - being able to grant other Users access. The value **True** is displayed where access is given and **False** where access is denied. Those users granted administrator level on the server console, automatically have full power everywhere.
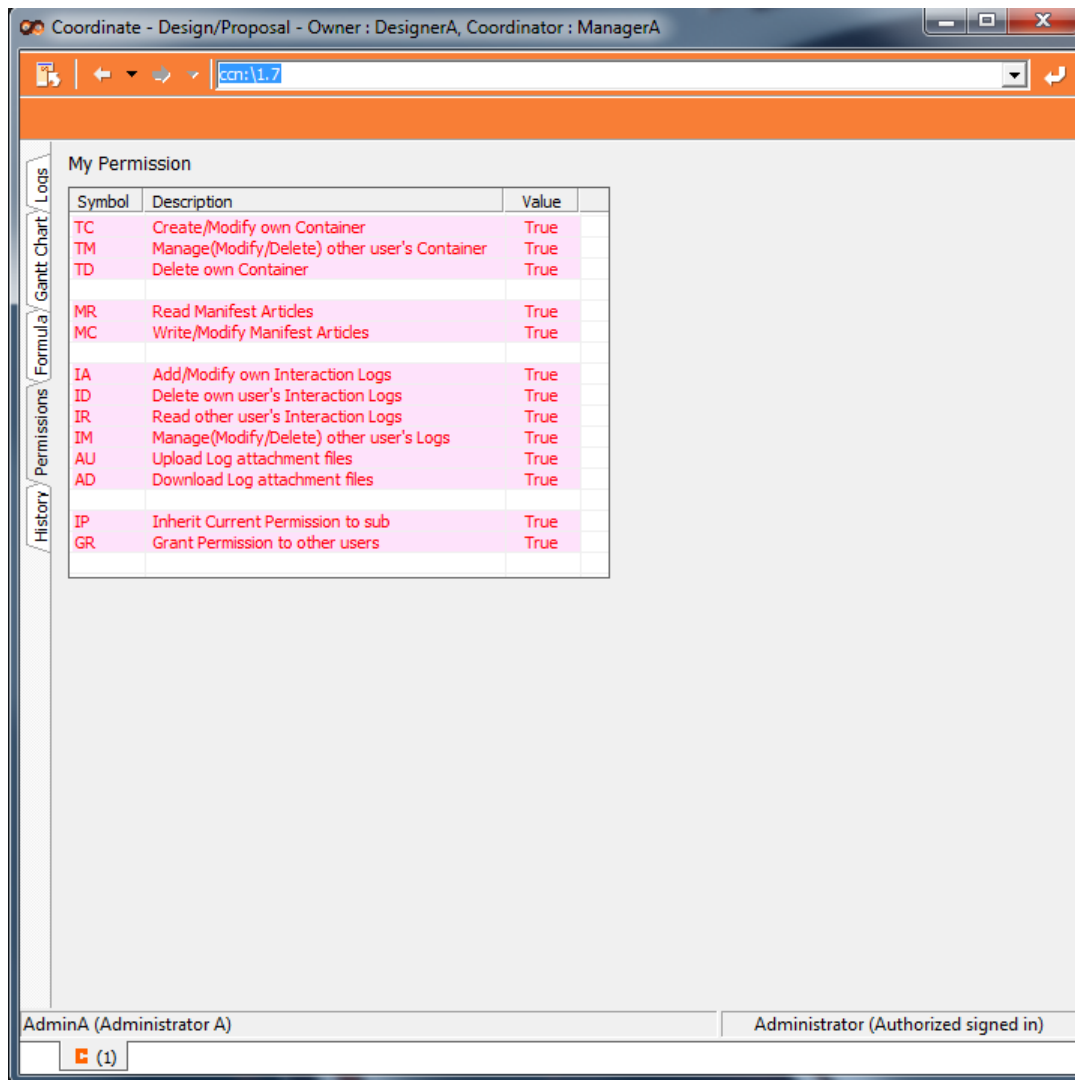
For user with the Permission to grant Permissions to other Users, this Permission View is split into two parts. The bottom part isn't interactive and shows the same permission legend as in the picture above whereas the top part of the View is interactive. The top part is where you decide who gets access to what.

Add User; Add Group

To add a User or Group to the Permission list click the Add User icon: in the top Toolbar or hold the cursor in the User list - right-click and select 'Add...'.
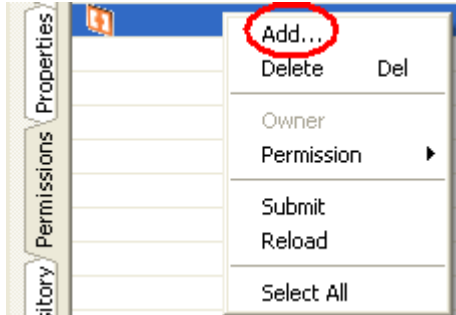
A new window - '**Select Group & User**' - appears with a list of all Users on the server below the default tab. The entire server's set-up 'Groups' can be found under the second tab.
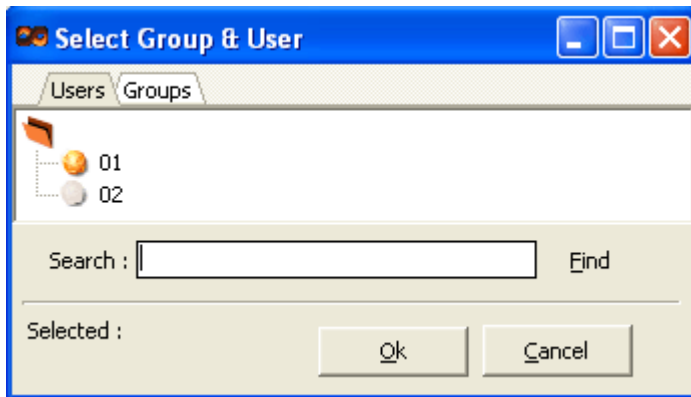
Select/Multiselect the User(s) or Group(s) you wish to add and click 'Ok' and it appears added to the list on the Permissions View. In this example User '01' was selected.

Set Permissions

Once here you can either manually 'check' the boxes that cover the access you wish to grant access. Once you have assigned the relevant Permissions (explanations of the abbreviated permission categories - all used in both the red and the green zone - are given in the My Permissions legend), then either click the **Submit User** button ⬛ in the top toolbar or right-click again and select **Submit** when you've finished.
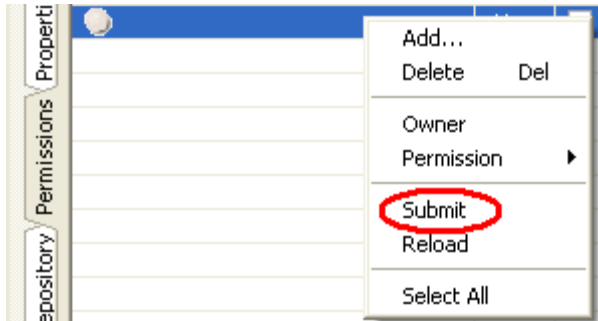
Delete User; Delete Group

To delete User(s) and/or Group(s) from the Permission list, select/multiselect the name(s) of the one(s) you want to remove; then either click on the Delete User icon: ⬛ on the top toolbar, or right-click and select Delete – or use the Del shortcut on your keyboard.
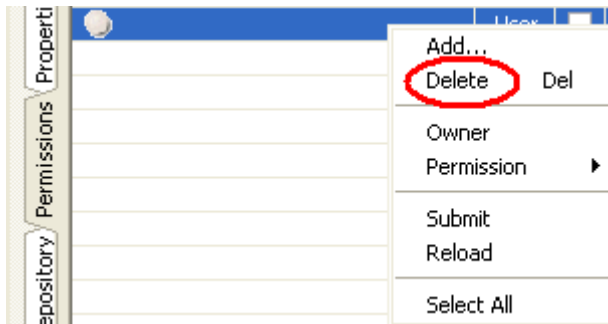
Then, to save your changes, either click the **Submit User** icon [image] in the top toolbar or right-click again and select **Submit**.
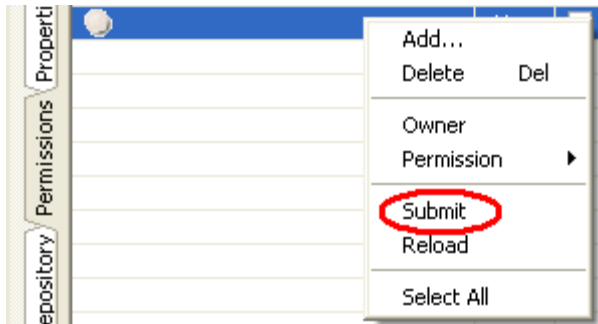
Reload

If you make a mistake and wish to reload/refresh the Permissions View with the latest configuration saved on the server, hit the Reload icon: [image] or right-click in the list of Users/Groups and select 'Reload'.
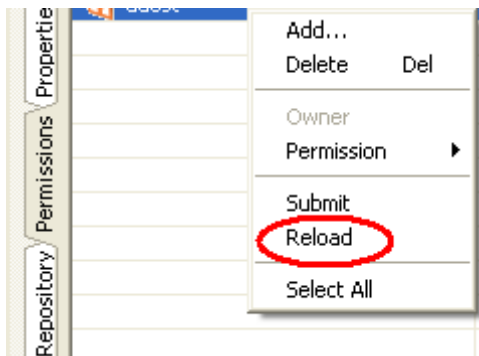
Select All

To select all the Users and/or Groups in the User list, either select them manually or right-click and choose **Select All**.
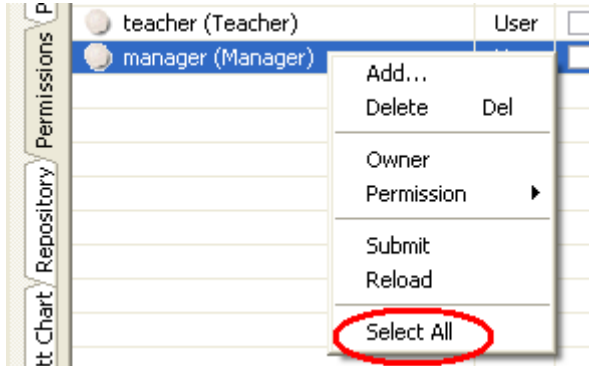
This can be useful if you wish to delete all users/groups or give all of them the same permission etc.

History

Under the bottom tab the history of all important changes made to the container is listed, which can be very useful if the user changes something by mistake and wants to revert to an earlier name, status icon, color, etc. It is also a good way to find out what other users have changed if you're notified that there is a change and the container name goes bold but you're unsure what is new.

Repository

General

The Repository has been designed as a place to allow you to upload, download, store and share large amounts of data.

The screen is divided in two. The top half of the screen shows what has already been uploaded <u>to</u> the Repository by you or other users, and so what is available for you to download <u>from</u> the Repository. The bottom half of the screen displays what is on your local computer, and so what can be uploaded to the Repository.

Both halves are further divided into two fields. The left field consists of **directories**, and the right one displays individual **files**.
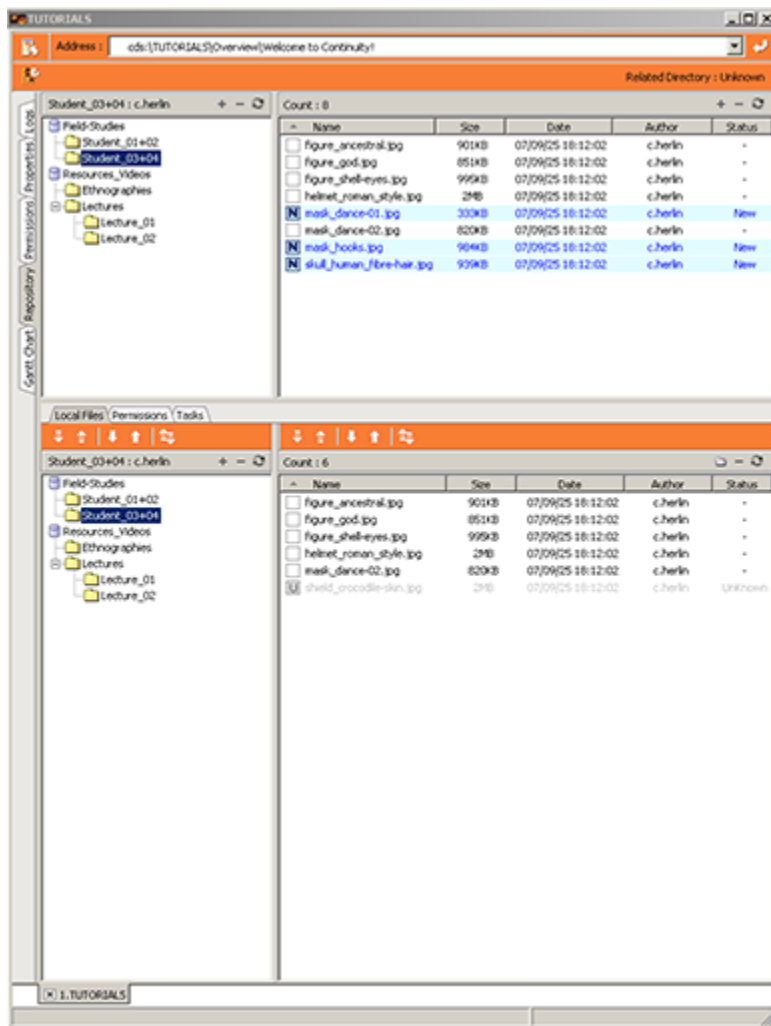
As you will soon notice, when you work in one file structure the corresponding one will display the equivalent directories and files (if available). Continuity also displays the status of the content of a Repository by using color coding. Blue means new/newer whereas red means older when compared to the opposite file structure.

This way it is easy to manage your local files versus the files which are to be uploaded to the Repository. For example, you can easily synch up the two sides by overwriting old directories/files with new ones.

Thanks to the Repository, you can work as normal - saving and editing files on your local computer - and then when you return to the Continuity screen they will be there waiting for you.

Just like the other parts of Continuity, the Repository comes with its own **Permissions** which control access. Users with the ability to grant permissions can thus control who can upload/download/modify etc what parts of a Repository.

Active

When you first go to the Repository View, it will appear quite 'empty' (faded/pale). Don't let this discourage you; it is simply because you have not yet activated any Repository.
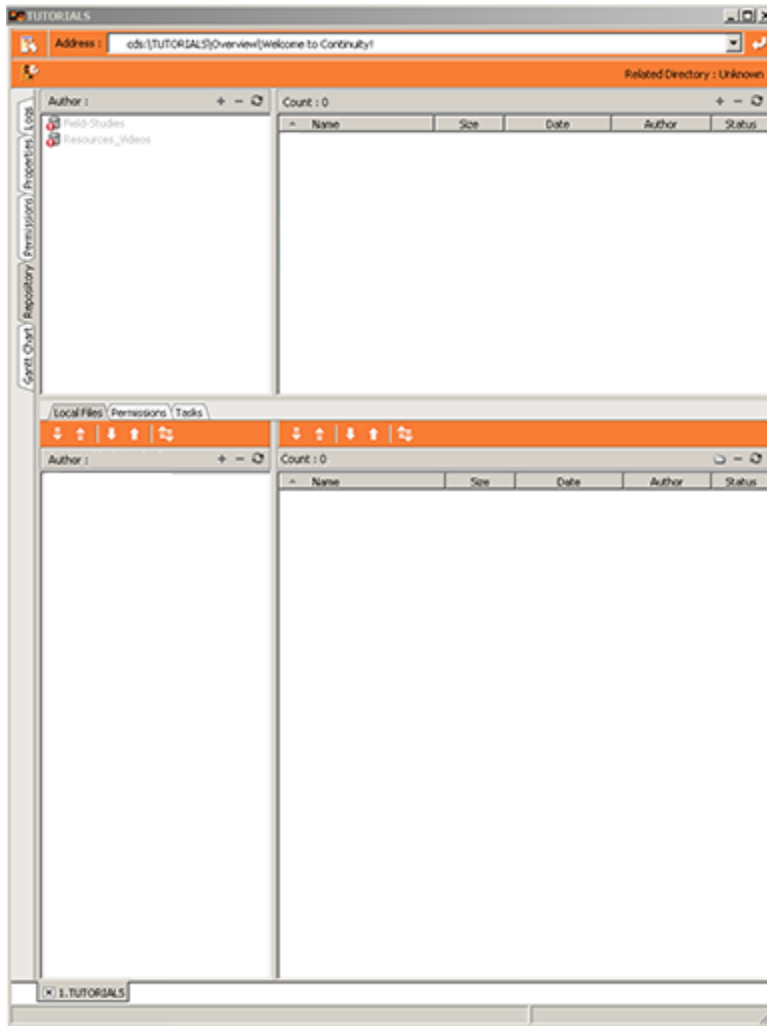
To **Activate a Repository** simply double-click on its name in the top left field. It has this icon next to it: ⬦ showing that it is inactive. It will still look quite faded, but its sub-directories will appear and a new Active icon will appear: ⬦.

Once you select one of these directories, the files that it carries will appear to the top right and it will not look so 'empty' anymore! If you then start downloading also the bottom half of the screen will start to be populated with directories and files.
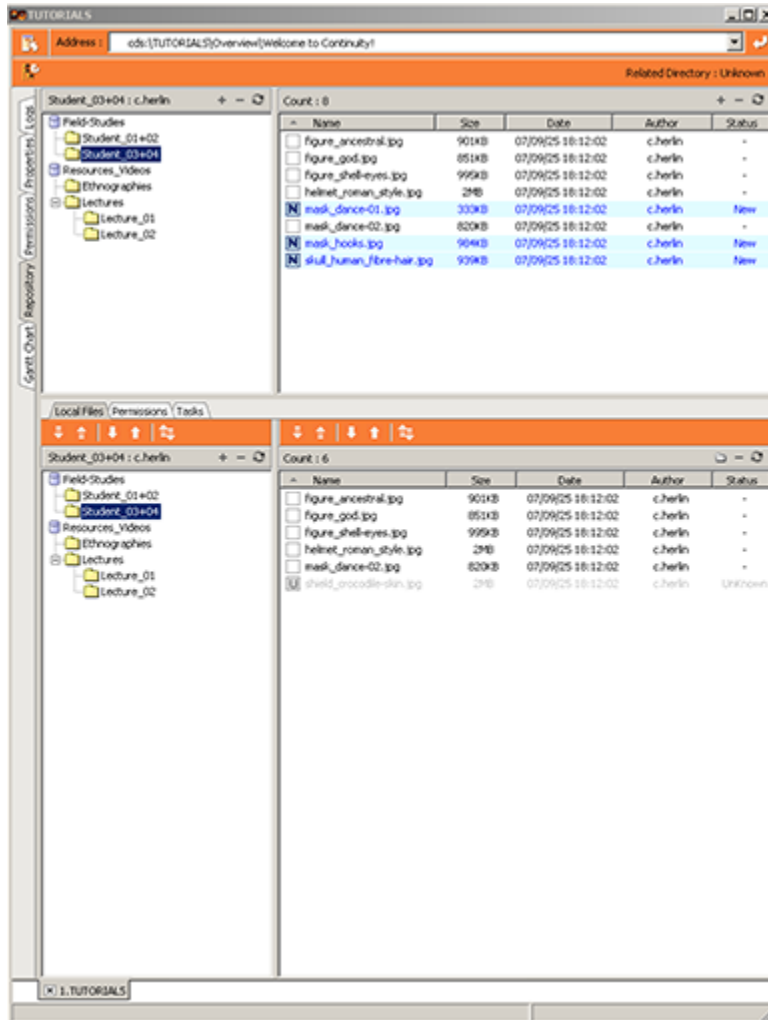
Select/UnSelect Sub Directories

Before you upload or download a directory where you also want to include sub-directories, it is important to select them either manually or by choosing '**Select Sub Directories**' in the drop-down menu. Place the cursor over the directory in question, then right-click and the menu will come up.

If the sub-directories of a directory are already selected and you wish to upload/download only the top directory, follow the same steps but choose '**UnSelect Sub Directories**' in the drop-down menu instead.

Upload; Smart Upload

To **upload** to the Repository, select the directories/files in the bottom part of the screen and click the upload icon: ⬆.

Smart upload means that you only upload the directories/files that do not already exists on the server and/or only overwrite different versions of the same files (**important** is that this includes older ones). To use this option, select the desired directories/files in the bottom half of the screen and hit the smart download icon: ⬆.

To upload, you can also right-click in the bottom half of the Repository View and choose "Upload" or "Smart Upload" from the drop down menu.

Download; Smart Download

To **download** from the Repository, simply select the desired directories/files in the top half of the screen and hit the download icon: ⬇.

Smart download means that you only add the directories/files that you do not already have downloaded on your disk and/or only overwrite different versions of the same files (**important** is that this includes older ones). To use this option, select the desired directories/files in the top half of the screen and hit the smart download icon: ⬇.

To download, you can also right-click in the bottom half of the Repository View and choose "Download" or "Smart Download" from the drop down menu.

Transfer Queue

Any time the user chooses to upload or download directories and files, the selected files are added to the transfer queue at the bottom of the repository view. **Before any transfer** of the queued files/directories takes place, the user needs to **press start** to initiate it. For large transfers of data or on slow connections this is very useful as it allows you to prepare a list of files/directories, press start and take a break until the transfer has concluded.

Create Directory

To create a new directory in either data structure, click the corresponding 'Add Directory' icon: ＋. To add one on the server, click the top-most icon, and to add a directory on the local disk use the icon located in the lower part of the screen. Then give this new directory a name and click 'OK'.

To bring up the drop down menu to create a new directory on the server, right-click in the top left field of the Repository View. Select 'Create Directory' in this menu, give this new directory a name and click 'OK'.

To do the same on the local disk, right-click in the left bottom part and follow the same steps.

Rename Directory

Select the directory that you wish to rename in either data structure and right-click. Select 'Rename Directory' in the menu that pops up, give this directory a name in the pop-up box that appears and click 'OK'.

You can also use shortcut key F2 to rename the currently selected directory and press enter on your keyboard to confirm.

Delete Directory

First select the directory/directories that you wish to delete in either data structure, and then click the corresponding 'Delete Directory' icon: −. To delete one on the server, click the top most icon, and to delete a directory on the local disk use the icon located in the lower part of the screen. Then confirm this by clicking 'OK' in the box that pops up.

Alternatively, bring up the drop down menu to delete a directory on the server after you've made your selection of directory/directories to delete, right-click in the top left field of the Repository View. Select 'Delete Directory' in this menu, and confirm this by clicking 'OK'.
To do the same on the local disk, right-click in the left bottom part and follow the same steps.

You can also select the directory/directories that you wish to delete in either data structure - then press the 'del'-key. You will be asked for confirmation on a pop-up box. Confirm by clicking 'OK'.

Rename File

First select the file that you wish to rename in either the top or bottom part of the Repository View. Then right-click as you hover on top of the file in question to bring up the drop down menu. Select 'Rename File' in this menu, give it a new filename and confirm this by clicking 'OK'.

You can also use shortcut key F2 to rename the currently selected file and press enter on your keyboard to confirm.

Delete File

First select the file/files that you wish to delete in either the top or bottom part of the Repository View, and then click the corresponding 'Delete File' icon: . To delete files on the server, use the top most icon, and to delete a directory on the local disk click the icon located in the lower part of the screen. Then confirm this by clicking 'OK' in the box that pops up.

Alternatively, first select the file/files that you wish to delete in either the top or bottom part of the Repository View. Then, to bring up the drop down menu to delete files, right-click in the relevant file field of the Repository View. Select 'Delete' in this menu, and confirm this by clicking 'OK'.

You can also select the file/files that you wish to delete in either the top or bottom part of the Repository View then press the 'Del'-key; and confirm this by clicking 'OK' in the box that pops up.

Synchronize

To **synchronize** the directories or files on the server and your local directories or files, select the relevant directories/files and hit the synchronize icon: .

To synchronize you can also right-click in any of the fields in the Repository View and select '**Synchronize**' after you've selected your directories/files.

This will make a transfer queue where directories/files that are newer on the server side will be queued up for download to overwrite the older client side equivalents and directories/files that are newer on the client side will be queued for upload to the server where it will overwrite directories files that are older.

Clean Up

This feature deletes files off your local disk that are of 'Unknown Status' and files off the server that are new in the sense of not yet recognized by the local Repository. In other words, it literally cleans up either Repository.

To clean up, select the directory/directories that you wish to clean up in the left hand column and right-click. Select 'Clean Up' in the menu that appears and confirm by clicking OK in the pop-up window.

Reload

To reload **all** open **repositories** simply click the Reload icon: , located at the top left of the Repository View.

To reload only the **repository** that you are currently working in, click the Reload icon: which is located to the <u>left</u> of the Repository View.
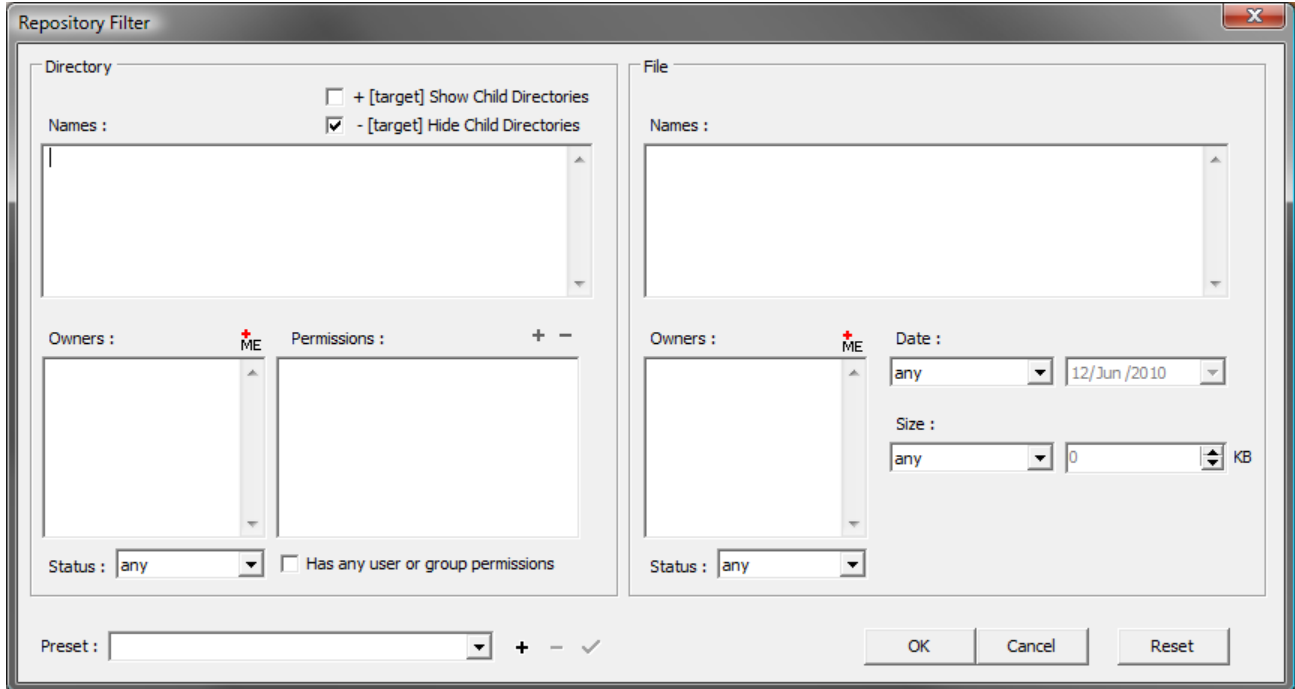
To reload only the **file lists** of the currently open/active repository, click the identical Reload icon: but the one which is located to the <u>right</u> of Repository View.

The other way of reloading the currently open view is to bring up the drop-down menu by right-clicking in the one of the four fields that you wish to reload and choose 'Reload'.

Repository Filter

When up/downloading a lot of files it is useful to be able to select parts of them. To do so, click the Filter icon: 🔻 at the top of the Repository View.

This will bring up the pop-up box below.

Type the name of directories you want to include in the selection in the top left hand field. If you wish to show or hid child directories, use the tick-box options to the top left of this field.

In case you want to include certain keywords but exclude other in your selection, list the ones you want to **include** with a '**+**' in front of them and the ones you wish to **exclude** with a '**-**' in front of the name. As an example: to include directories called "images" but exclude directories called "documents", enter:

+images
-documents

When you're happy with your filter selection click OK and the filter will apply to all repositories. To clear the filter, press this clear icon: 🔻.

The same goes for the file section to the left. Both sections feature a lot of other options as well that will be very useful to isolate repository directories and files.

Repository File Filter Thru Container Link

Another way of filtering files in the current directory is to link them to the name(s) of the container(s) currently selected in the container tree. This is useful if you have a directory with lots of files and you wish to display only files with certain name prefixes. To use this function create containers with those names in a project (unless they already exist), select them and then apply this filter in your directory. The inverse function is also available, to enable you to check what files do *not* match your prefix.

<u>Link Between File Names And Selected Container Names</u>

To **apply** the filter, select the containers of your choice and hit this link icon: and it will go white to indicate that the filter is applied. The result shows you all files whose prefix do match up with the name of the selected container(s).

To **clear** the filter, simply press the link icon again.

<u>*Inverse* Link Between File Names And Selected Container Names</u>

To **apply** the inverse to filter, select the containers of your choice and hit this icon: and it will go white to indicate that the filter is applied. The result shows you all files whose prefix do *not* match up with the name of the selected container(s).

To **clear** the filter, simply press the inverse link icon again.

Server

Create Repository

To create a Repository, firstly right-click in the top left hand side of the Repository screen. A drop-down menu will appear.

Choose 'Create Repository'. A pop-up box appears. Choose a name for this new Folder and specify a '**Home Directory**' on your own local disk, which will be used as the root path of this Repository.

Now tick the '**Fixed Home Directory**' option if you do not want other Users to be able to change the root path. If you do want them to be able to change the root path, leave this tick-box unchecked.

Click 'Ok' and your Repository is created!

Modify Repository

To modify a Repository, select this Repository in the top left field of the Repository View. Then right-click in this field and choose 'Modify Repository' in the drop down menu that shows up.

A pop-up box 'Repository Properties' appears. In the '**Name**' field you can rename this Repository.

In the '**Home Directory**' field you can modify the directory path either by entering a new one or by browsing for one. To browse, click the 'Change...'-button.

And in the tick box below you can toggle between using this as a '**Fixed Home Directory**' for all Users (that they cannot change) or not.

Delete Repository

To delete a Repository, select this Repository in the top left field of the Repository View.

Right-click in this field and choose 'Delete Repository' in the drop down menu that shows up.

The last step is to confirm that you want to delete this Repository altogether, which is done by clicking 'OK' in the box that pops up.

If you also have directories/files of the same repository on your local disk, it will give you the option to delete them too.

Add File

To add a new file, or several new files, in a directory on the Server, click the 'Add File' icon: + to the top right of the Repository View. You then get to browse for files in a pop-up window. Once you have selected/multiselected and clicked 'Open' in this window, these new files will automatically be queued up for upload without you having to copy them to the corresponding local Repository directory.

You can also bring up the drop down menu to add a new file on the server, by right-clicking in the top right field of the Repository View. Select 'Add File' in this menu, and you get to browse for files to add.

But maybe most conveniently, you can **drag and drop** one or multiple **files from Windows Explorer** into the server file field to queue them up for upload.

Local Files

Open Directory

Make sure the directory that you wish to open is selected. Click the Open Directory icon: ⬑ to the very right or right-click in the bottom half of the Repository View to bring up the drop down menu. Choose 'Open Directory'. This opens Windows Explorer for the relevant directory.

Open File

Select the File you wish to open in the right bottom field of the Repository View, and bring up the drop down menu through a right-click. Select 'Open File' in this menu and the file will be opened for you in the relevant program.

Or even easier, simply **double-click** on the **file**!

Change Root Path

If the user who created a Repository did not fix the home directory for this Repository, other users have the ability to change the root path of the home directory.

To do so, select the Repository in question in the bottom part of the Repository View, right-click and choose 'Change Root Path' in the drop down menu that appears. You will then get to choose a new directory in the pop-up window. This directory will thereafter be your home directory for this Repository – all directories and file will be downloaded to this new location.

Permissions

Permissions - the screen accessed by the second tab to the top right of the Repository View - is where you - as User and Administrator - decide who gets access to what in the Repository.

Just like with the Tree Window's container permissions, there are two permission **zones**: one more restricted green zone which requires each client to register a key on their system and one less restricted red zone which does not require any key registration. Keys are distributed by the administrator from the server. By allowing the same user or group access to different data for the different zones; more sensitive data can be limited to be used only in the office by registering a key on the office computer system, whereas less sensitive data can be accessed from anywhere: from a laptop, a home system or even from an Internet cafe.

The Repository Permissions View also shows the user what permissions they have been granted for the directory currently selected in the repository. The legend called **My Permission** lists the various permission categories that you can be granted. As you can see there are many different kinds of access - e.g.: read-only; creating your own directories; modifying other people's files - and the top level after administrators - being able to grant other Users access. The value **True** is displayed where access is given and **False** where access is denied. Those users granted administrator level on the server console, automatically have full power everywhere.

My Permission

Symbol	Description	Value
CD	Create, Delete, Rename Own Directory	False
MD	Manage(Delete, Rename) Other User's Directory	False
RF	Read(Download) File	False
AF	Add File + Manage(Add, Delete) Container Prefix	False
WF	Write(Overwrite, Delete) Own File	False
MF	Manage(Overwrite, Delete) Other User's File	False
CR	AF,WF,MF with Container Prefix Rule	False
IP	Inherit Current Permission to sub	False
GR	Grant Permission to other users	False

Add User; Add Group

To add a User to the Permission list click the 'Add User' icon: . A new window appears with a list of names. Select one or more names and click 'Ok'.

You can also hold the cursor in the list - right-click and select '**Add...**'. A new window appears with a list of names. Select one or more names and click 'Ok'.

Delete User; Delete Group

To delete Users from the Permission list select the name/names in question; then click on the Delete User icon: . You can also hold the cursor in the list - right-click and select 'Delete'.

Or even simpler, select the name/names in question; then right-click and hit '**Delete**' on your keyboard.
Then to save your changes, either click the Submit User icon in the top Toolbar or right-click again and select '**Submit**' in the right-click menu.

Set Permissions

When you've added a user or a group to, you will need to set the desired permissions. This is done by manually ticking the tick-boxes for the permissions that you wish to grant. You can also use the copy-paste commands accessed thru the right-click menu to copy permissions from one user/group to another.

Once you have assigned the relevant Permissions (explanations of the abbreviated symbols are given in the 'My Permission' legend), then either click the Submit User button in the top Toolbar or right-click again and select '**Submit**' in the right-click menu when you've finished.

Reload

If you make a mistake and wish to reload/refresh the Permissions View with the latest configuration saved on the server, hit the Refresh icon: .

Or right-click and select 'Reload' in the right-click menu.

Select All

To select all the names in the User list right-click and choose 'Select All'.

This can be useful if you wish to delete all users/groups or give all of them the same permission etc.

Logs

This shows the user a log of what repository actions they have taken since logged in; what directories they have added, what files they have downloaded, etc.

History

This shows the user a complete history log of what repository actions any user has taken in the directory they are currently viewing: what files have been overwritten, deleted, renamed etc.