



Administrator's Manual

Table Of Contents

Administrator's Manual	1
1 Introduction	1
About @CUMEN	1
The role of the administrator	2
How to use help	3
Conventions used in Help	3
Navigating Help	4
Contact us	6
2 Membership	7
About changing personal preferences	7
Reviewing a member's details	8
Reviewing changes to members' details	9
Reviewing contact details	10
Reviewing a member's account details	11
Reviewing a member's account history	12
Deleting a member's account	13
Reviewing a member's log-in history	14
Reviewing a member's favourite categories or experts	15
Reviewing user names and passwords	16
Reviewing system preferences	17
Reviewing question preferences	18
Reviewing question and answer alerts	19
Reviewing a member's public name	20
Adding notes to a member's details	21
Restricting members to specific IP addresses	22
Setting administrator alerts	23
What is an expert?	24
Reviewing expert details	25
Reviewing an expert's areas of expertise	27
Approving Areas of Expertise	27
Deleting areas of expertise	27
Reviewing an expert's qualifications	28
Adding a qualification to the system	28
Deleting an expert's qualification	30
Reviewing an expert's skills	31
Reviewing profiles	32
Adding a formatted profile	33
Reviewing an expert's web site	34
Displaying experts flags	35
Finding out who likes/dislikes a specific expert	36
Hiding experts from searches	37
Managing live consultations	39
About the rating system	40
Reviewing an expert's ranking	41
Finding groups of members	42
Finding a specific member	43

3 The Hierarchy & categories	45
About the Hierarchy	45
Using browse hierarchy options	46
Indicating which subcategories appear in the root of the hierarchy	46
Adding categories	47
Linking categories	48
Copying categories	49
Editing a category	50
Hiding categories	51
Deleting categories	53
Selecting categories	54
Listing members' favourite categories	55
Reviewing categories suggested by members	56
4 Questions	59
About the KnowledgeBase	59
Searching for outstanding questions	60
Searching for resolved questions	62
Viewing questions	63
Viewing answers	65
5 Documents & uploaded files	67
About the Document Library	67
Listing uploaded files	68
Searching for documents	69
Opening & viewing documents	70
Reviewing CV's & other files	72
Indexing & publishing CV's	74
Uploading an expert's CV	75
Deleting an expert's CV	76
Listing uploaded images	77
Reviewing photos & other images	78
Deleting an expert's photo	79
Resizing photos	80
Uploading an expert's photo	81
6 The Messaging system	83
About the @CUMEN messaging system	83
Sending messages	84
Formatting messages	85
Searching messages	86
7 Global settings	87
Reviewing global settings	87
About eligibility & similarity checks	88
Types of eligibility check	88
Defining eligibility checks	88
Defining similarity checks	89
About system settings	90
About e-mail settings	92
About log-in settings	93
About search settings	94
About image settings	95
About question settings	96
About global expert settings	97
About administrator reviews	98

Inactive experts, documents and questions	99
Inactive Experts	99
Inactive Documents	99
Inactive Questions	100
Enabling & disabling the rating system	101
8 System tasks	103
Changing the administrator password	103
Sending e-mail to all members	104
Updating the list of qualifications	105
Adding a qualification	105
Changing an existing qualification	105
Updating the information required from members	107
Updating the message of the day	109
Managing automated processes	110
Stopping and starting automated processes	112
Updating full text searches	113
Running Technical Support scripts	115
Examining login records	116
Viewing activity reports	117

1 Introduction

About @CUMEN

@CUMEN makes it easy for you to find the information you need, when you need it. It is a knowledge-sharing tool based on the most successful way of getting information - asking questions.

The main players in @CUMEN are:

- Inquisitors who ask questions
- Experts who answer questions

The main elements of @CUMEN are:

- The @CUMEN Hierarchy An electronic filing system used to categorise questions & answers and document solutions under topics to make them easy to find
- The @CUMEN KnowledgeBase A searchable archive of questions and answers
- The @CUMEN Document Library A searchable archive of document solutions
- The @CUMEN Messaging System Use to send and receive messages without using your e-mail system.
- The @CUMEN Search Engine Searches questions and answers, document solutions and experts details to find answers to your questions



To learn how to use @CUMEN, have a look through the Getting Started book in the online help, or check out the Getting Started online tutorial.

The role of the administrator

The administrator maintains the @CUMEN system and facilitates and encourages knowledge sharing.

Some key tasks are:

- Create and maintain a hierarchy under which information is organised
- Review new category suggestions
- Use global settings to customize @CUMEN to suit the organisation
- Set the administrator password, and maintain a secure system by changing it regularly.
- Review member details
- Review uploaded files, CV's, images and documents
- Help people solve basic problems

To encourage knowledge sharing, the administrator should regularly search for outstanding questions and prompt experts to answer them. This also prompts experts and inquisitors to declare their expertise.

You can do this in several ways:

- Use the Message of the Day
- 'Advertise' required information on @CUMEN
- Send global messages or e-mails
 -
 - The video tutorial "What does the administrator do?" gives you an overview of the role of the administrator.

How to use help

@CUMEN includes complete documentation in an accessible HTML-based help system. Our online Help guides you through @CUMEN concepts, tools, commands and features. Click the Help menu option in the top right of any page to get help with that topic.

Conventions used in Help

Typefaces

We use different typefaces so that you can distinguish between text that appears on @CUMEN pages, and text that you key in yourself:

- Any text that you see on @CUMEN pages appears in ***bold***. For example, page titles, menu options and field names.
- Sentences that introduce step by step instructions are in ***bold italic***.
- The text you key into boxes on @CUMEN pages appears in italic.

Noteboxes

Noteboxes provide extra information:



Warnings to help you avoid making mistakes, or wasting your time.








Tips to help you work smarter.



Notes draw attention to details that you might easily overlook.

Navigating Help

Use the **Contents**, **Index**, **Search**, or **Glossary** buttons on the toolbar to navigate @CUMEN Help.

 Contents	Use the Contents button to browse Help topics on pages in an electronic book. The Table of Contents appears in the left hand pane. Click on the + symbol against a book to open the chapters or pages it contains.
 Index	Use the Index button to browse an alphabetical list of keywords. Each keyword links to one or more topics. To open a topic, click the keyword. If the keyword appears in more than one topic, a dialog opens so you can select the topic to view.
 Search	Use the Search button to search for topics using words the topic might contain. <i>To search for a topic:</i> <ol style="list-style-type: none">1. Type in the word(s) to search for. @CUMEN searches all topic text for the words you type.2. Click the  button to search. Click a topic title in the left pane to open the topic in the right pane.
 Glossary	The glossary contains definitions for the terms we use in @CUMEN.

The @CUMEN help system is designed to give you the help you need, when you need it. So topics often contain links to more information. @CUMEN uses the following types of links:

Hotspots

Click on a Hotspot title to reveal more information. Click on the Hotspot title again to hide the information.

Popups

Click on popup title to open a new window containing more information.

Hyperlinks



Click on a hyperlink to jump to another topic.

Related Topics

Click the  button to display more Help topics.

- If there is a single related topic, @CUMEN takes you directly to that topic.
- If there is one more than one related topic, Help displays a list of topics. Click a topic title to open it.



- Click the **Back** button in your browser to return to the previous topic.
- Use your browsers **Back** and **Forward** buttons to move through recently viewed topics.
- The  icon appears on some pages (for example, against some fields you need to complete on the **Expert Details** page). Click the  icon to get help with that specific element on the page.

Contact us

We value your feedback, suggestions, even your complaints! You can contact us at:

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2 Membership

About changing personal preferences

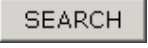
Members use their personal preferences to control how they use @CUMEN. For this reason, you should only change a member's personal preferences when a member asks you to do so, or in exceptional circumstances.

If you do change a member's personal preferences, use the Messaging System to tell them what changes you have made.


Reviewing a member's details

The administrator can view or change a member's details using their member number or other details.

If you don't have the member's number:

1. Go to the Members and Membership section of the main menu.
2. Click **Search members** to open the **Search members** page.
3. Enter the information you have. This might be a last name, first name, or phone number. For example, to search for a member whose last name is "Jones", type *Jones* in the Name field.
4. Click the  button.
5. If only one member matches your search, @CUMEN opens that member's details. Otherwise, @CUMEN displays a list of members that match your search criteria.
6. Click on a member's name on the list to open their details:


If you have their member number:

1. Go to the **Members and Membership** section of the main menu.
2. Click **View/Update member details** to open the **View/Update member details** page.
3. Enter the member number.
4. Click the  button.
5. @CUMEN opens the member's details.

Reviewing changes to members' details


The administrator can set @CUMEN to display a prompt when a member changes their details. This prompt will appear at the bottom of the main menu:

To review changes to a member's details:

1. Go to the main menu and click the **reviewed** link in the prompt.
2. @CUMEN displays a list of members waiting for review.
3. Click an entry in the **Review** column to review the changes. @CUMEN opens the **View/Update Member Details** page. The  icon marks the details the member has changed.
4. When you have finished reviewing the member's details, close the **View/Update Member Details** page. Show me
5. On the **Review Member Details** page, notice that @CUMEN has ticked the **Done?** checkbox against the member's name.
6. Click **Return to Admin Menu** to return to the main menu.

Reviewing contact details

To view or change a member's contact details:

1. Open the member's details. Show me
2. Go to the **Member** section to update:
 - **Name**
 - **Office address**
 - **Country**
 - **Flag:** An administrator can assign flags to members to indicate where they are located. This is useful if you have offices in different countries. Show me
 - **Telephone number**
 - **E-Mail address:** Tick the **Include in profile** checkbox to show the member's e-mail address to other members:
3. Click in any field to change that entry.
4. Click the  button to save the changes.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Reviewing a member's account details


The **Account Details** section of the **View/Update Member details** page shows the date that the member opened their @CUMEN account. You cannot change this date.

The administrator can view and change the status of a member's account:

The options are:

Option	Account status
Normal	
On hold	The member can log in, but cannot ask or answer questions.
Suspended	The administrator or @CUMEN itself might temporarily prevent a member from logging in.
Closed	The member cannot log in.

To view or change the status of a member's account:

1. Open the member's details.
2. Go to the **Account details** section of the **View/Update Member details** page.
3. Click an account status option.
4. Click the  button to save the changes.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

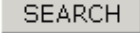
Reviewing a member's account history

The administrator may occasionally need to view the history of changes made to a member's account.

To view a history of changes made to a member's account:

1. Open the member's details.
2. Click the **Member History** menu option at the bottom of the page.
3. @CUMEN opens the **View Member History** page. This is where you specify the information you are looking for:

Field	Description
Updated by	Who changed the member's details? The options are: <ul style="list-style-type: none">• Account created• System• Member• Administrator
Date	Enter the date range you want to search.
Fields	To only display changes to specific fields: <ul style="list-style-type: none">• Tick Display changes to these fields only.• Select the fields you are interested in. To select more than one field, hold down the Ctrl key while you click each field. To display changes to all fields: <ul style="list-style-type: none">• Tick Display all changes. Do not select any fields. To display changes when a particular field is changed: <ul style="list-style-type: none">• Select a field name.• Tick Display all changes.



4. Click the  button.
5. @CUMEN displays a list of changes to members' details, including:
 - **Date**
 - **Updated by**
 - **Member number**
 - **Fields** lists the fields that were changed.
6. If you selected the **Display all changes** option, click an entry in the **Fields** column to view more information on the changes to the member's details. Close the popup window when you are done.
7. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Deleting a member's account

The administrator can only delete a member's account if:

Condition	More information/online Help topic
Allow Sensitive Deletes is set to Yes	
Their account status is Closed	Reviewing a member's account details
Members cannot search for them.	Hiding experts from searches
They are not any member's favourite or least favourite expert.	Check out their Popularity in the Expert Details section of the View/Update Member Details .
They have no questions or answers on @CUMEN.	Check this by: Searching for outstanding questions Searching for resolved questions
A member has not picked them to answer an outstanding question.	
Any messages they have sent to members have been deleted.	
The administrator has not advertised an unanswered question that they have posted.	Updating information required from members

To delete a member's account:

1. Open the member's details.
2. Go to the @CUMEN **Details** section of the **View/Update Member details** page.
3. Go to **Settings**, click  in the dropdown field, then click **Delete Member's Account**.
4. Click the  button.
5. @CUMEN confirms that the member's account has been deleted. You cannot restore the member's account. If they want to use @CUMEN again, they will need to create a new account.
6. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Reviewing a member's log-in history

The administrator can check when a member logged in and logged out of @CUMEN, as well as the IP address of the computer they used to access @CUMEN.

To review a member's log-in history:

1. Open the member's details. Show me
2. Click the **Login History** menu option at the bottom of the page.



You can also go to the **Housekeeping & Reporting** section of the @CUMEN **Administration** main menu and click **Examine Login Records**.

3. To view information from a specific date range, go to **Date:** in the **View Login/Logout records** window. Use the date format dd/mm/yyyy. For example, enter 20/01/2003 for 20 January, 2003.



To view a member's log-in history from a specific date to the current date, enter a date in the **From** field and leave the **To** field blank.

4. @CUMEN displays the member's log-in history.
5. Click **Return to Admin Menu** to return to the main menu.

Reviewing a member's favourite categories or experts


Members can list and change their favourite categories and experts on **My HomePage**. The administrator can view, but not change these favourites.

To view a member's favourites:

1. Open the member's details. Show me
2. Go to the **Personal Preferences** section of the **View/Update Member details** page.
3. Go to **Favourites** and click on **Favourites** or **Experts**.
4. @CUMEN opens the **List Favourites** page with the appropriate checkboxes ticked.
5. Tick or clear the checkboxes to indicate the member's favourites you want to view or change.
6. Click the **Fetch** button.
7. @CUMEN displays the results of your search on the **List Favourites** page.
8. Close the **List Favourites** page to return the to member's details.
9. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Reviewing user names and passwords

To view or change a member's:

- **User name**
 - **Password**
 - Password hint
1. Open the member's details. Show me
 2. Go to the **Login details** section of the **View/Update Member details** page.
 3. Click in any field to change that entry.
 4. When you have finished, click the  button to save the changes.
 5. Click **Return to Admin Menu** to close the member's details and return to the main menu.



Remember to tell the member their log-in details have changed!

Reviewing system preferences

System preferences are a member's e-mail and log-in preferences. An administrator can view and change these preferences. Tick a checkbox to enable the preference. Clear the checkbox to disable it. The options are:

Option	Description
Receive Global Mailings	Member receives messages sent to all members using the @CUMEN messaging system or the e-mail system.
Avoid E-Mail	Do not send this member e-mail. Use the @CUMEN messaging system instead.
Login to "My HomePage"	When a member logs in, @CUMEN opens My HomePage .


To view or change a member's system preferences:

1. Open the member's details. Show me
2. Go to the **Personal Preferences** section of the **View/Update Member details** page.
3. Tick or clear one or more **System preferences** checkboxes.
4. When you have finished, click the button to save the changes.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Reviewing question preferences

@CUMEN uses a member's question preferences as the default options when the member asks a question.

To view or change a member's question preferences:

1. Open the member's details. Show me
2. Go to the **Personal Preferences** section of the **View/Update Member details** page.
3. Tick a **Question preferences** checkbox or radio button to set each of the options members have when they ask a question.
4. Tick the **Confirm** checkboxes against those options that @CUMEN should ask members to confirm each time they ask a question.
5. Click the  button to save the changes.
6. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Reviewing question and answer alerts


Members can choose to receive alerts that:

- A member has posted a question in their area of expertise
- An expert has answered their question

The options are:

Option	Description	Advantage
None	Does not send an alert. Inquisitors must check their Outstanding Questions to see if any of their questions have been answered. Experts must look for questions to answer using the Browse and Search options.	
Messaging System	Sends the message using the @CUMEN Messaging system. It also creates an alert on the member's My HomePage .	@CUMEN messages can include direct links to @CUMEN elements, such as questions, answers, and uploaded files. Does not use your external e-mail system.
E-mail	@CUMEN sends an e-mail to the member using an external e-mail system (e.g. Microsoft Exchange)	The member receives alerts even if they are not logged in to @CUMEN. This works best if the e-mail system delivers mail immediately.
Both	@CUMEN sends messages using the Messaging system and the external e-mail system.	


To view or change a member's question and answer alerts:

1. Open the member's details.
2. Go to the **Personal Preferences** section of the **View/Update Member details** page.
3. Go to **Answer Alerts** or **Question Alerts**.
4. Click an option to select it.
5. When you have finished, click the  button to save the changes.
6. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Reviewing a member's public name

A member's public name is the name that other members see. It is usually their first and last name. For example, *John Littlewood*.

To view or change a member's public name:


1. Open the member's details. Show me
2. Go to the **@CUMEN Details** section of the **View/Update Member details** page.
3. Type a name in the **Public name** field, exactly as you want it to appear to @CUMEN members.
4. Click the  button to save the changes.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Adding notes to a member's details

Members can add a note to themselves on the **Settings** page of @CUMEN. This appears in the **Public note** field in their member's details.

The administrator can add a **Private note** to a member's details. This note is only visible to the administrator.

To view, change, or add a note to a member's details:

1. Open the member's details. Show me
2. Go to the **@CUMEN Details** section of the **View/Update Member details** page to view or change the **Public** or **Private note** fields.
3. When you have finished, click the  button to save the changes.
4. Click **Return to Admin Menu** to close the member's details and return to the main menu.


Restricting members to specific IP addresses

On a network that uses fixed IP addresses, the administrator can specify the IP address of the computer the member can use to log in to @CUMEN.



Talk to your network administrator if you need information about how your computer network uses IP addresses.

To specify the IP address a member can use to log in:

1. Open the member's details. Show me
2. Go to the @CUMEN **Details** section of the **View/Update Member details** page.
3. Type an IP address in the **IP Restrictions** field. To enter more than one IP address, enter each IP address, separated by commas.
4. Click the  button to save the changes.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

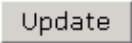


To find out what IP address(es) a member uses, review their login history.

Setting administrator alerts

@CUMEN can notify the administrator when a member next logs in, or each time they change their details.

To receive this type of alert:

1. Open the member's details. Show me
2. Go to the **@CUMEN Details** section of the **View/Update Member details** page.
3. Go to **Settings**.
 - Tick **Notify admin when they change their details** to have @CUMEN notify you every time the member changes their details.
 - Tick **Notify admin next time they login** to have @CUMEN alert you once the next time the member logs in. You will need to re-activate this alert each time you want to be notified the member logs in.
4. Click the  button to save your changes.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.
6. @CUMEN displays the alert below the main menu:

What is an expert?

Potential experts are members with useful skills or knowledge that they want to share with others. Chances are that all your members are experts in some field!

Members become experts by declaring their expertise and knowledge on the @CUMEN system.

As the administrator, one of your roles is to encourage members to declare their expertise and knowledge, and keep their profiles up to date. You can do this by:

- Advertising questions that are not being answered. This encourages people to recognize how valuable their skills and knowledge are.
- Using the message of the day to prompt members to become experts.
- Regularly check out your experts, so members have faith in their expertise.
- Send messages to members you believe can provide information on useful topics.

Reviewing expert details

The administrator can review an expert's details to check things like spelling and accuracy.




Spelling mistakes in keywords, profiles and expert details decrease the chances of members finding that expert.

To view or change a member's expert details:

1. Open the member's details. Show me
2. Go to the **Expert details** section to review these details:

Field	Description/More information
Expert since	The date and time an administrator first approved the member as an expert. You cannot change the information in this field.
Skill set	Reviewing an expert's skills
Qualifications	Reviewing an expert's qualifications
Areas of Expertise	Reviewing an expert's areas of expertise
Ranking	Reviewing an expert's ranking
Rating	Finding out an expert's rating You cannot change the information in this field. You can also see ratings for each of the expert's areas of expertise on their Areas of expertise page.
Logged in	Displays the date and time the expert last logged in. You cannot change the information in this field.
On holiday	The start and end date of the expert's holiday. While on holiday, experts: <ul style="list-style-type: none"> • Do not receive question alerts. Tick the Send question alerts checkbox to have @CUMEN continue to send question alerts to the expert while they are on holiday. • Are not available to answer questions • Cannot go on call, or hold live consultations
Brief profile	Reviewing an expert's profiles
Full profile	
Website	Reviewing an expert's web site
Keywords	Keywords are searchable. Add keywords to help member's find experts to answer their questions.
Generally online	The periods when the member is usually logged in.

Field	Description/More information
Photograph	The file name and location of the expert's photograph.
CV	The file name and location of the expert's CV. Reviewing CV's and other documents
Popularity	Finding out who likes/dislikes a specific expert

3. Click the  button to save the changes.
4. Click **Return to Admin Menu** to close the member's details and return to the main menu.



Reviewing an expert's areas of expertise

Experts select their areas of expertise from the hierarchy. This helps members or the administrator find them when they browse for experts to answer specific questions.

The administrator can choose to approve all areas of expertise before they appear in experts' public profiles.


Approving Areas of Expertise

To approve an expert's Area of Expertise:

1. If you have chosen to approve areas of expertise, @CUMEN displays a link at the bottom of the main menu when a member changes or adds areas of expertise to their expert details. Click the link to review the member's areas of expertise.
2. Alternatively, open the member details *Show me*. Go to the *Expert Details* section of the *View/Update Member Details* page. Click on *Areas of Expertise*
3. To approve all the areas of expertise, click the  button.
4. To approve single areas of expertise, click the *Approve?* checkbox next to the area of expertise.
5. Click the  button to save the changes.

Deleting areas of expertise

To delete an expert's Area of Expertise:

1. Open the member's details. *Show me*
2. Go to the *Expert details* section on the *View/Update Member Details* page. Click on *Areas of Expertise*
3. To temporarily remove an area of expertise without removing it, clear the *Approve* checkbox.
4. Click the *Delete* checkbox next to the area of expertise.
5. Click the  button to save the changes.



Members need experts to answer their questions, so it is important that you review newly-posted areas of expertise quickly.



Experts with fewer areas of expertise are listed higher when members browse for experts to answer their questions on specific topics.

Reviewing an expert's qualifications

Generally, formal qualifications increase an expert's credibility. Qualifications also demonstrate the expert's level of expertise. @CUMEN searches an expert's qualifications when members search for an expert to answer their questions. The administrator can choose to approve qualifications before they appear in experts' public profiles.

If an expert cannot find their qualification on the list, they select the **Other** option in the qualification **Level**, **Subject**, or **Institution** fields when entering their expert details. They then enter a description in the **Other details** field. When reviewing the expert's qualifications, the administrator can:

- Edit and add the qualification for that particular expert
- Add the qualification to the system list



You can also add new qualifications from the main menu and delete an expert's qualification.

To review an expert's qualification:

1. If you have chosen to approve qualifications, @CUMEN displays a link at the bottom of the main menu when a member changes or adds qualifications to their expert details. Click the link to review the member's qualifications.
 1. Alternatively, review the member's details and go to the **Expert details** section on the **View/Update Member Details** page. Click on **Qualifications** to open the **View/Update Expert's qualifications** window.
2. In the **View/Update Expert's Qualifications** pane, check and edit the text in the description box at the top of the page and the **Other Details ...** box. *Show me.*
3. If you want to, use this information to add new system qualifications.
4. If you added a new system qualification, select it from the relevant drop down list.




Leave the description box empty to have @CUMEN create a description based on the components you have selected from the drop-down list boxes. The description will read `<level> in <subject> from <institution>`. For example, *BA (Hons) in Biology from Aston University*.

5. Tick the **Accepted** checkbox next to the qualification.
6. Click the button to save the changes.

Adding a qualification to the system

To add a qualification to the system qualifications:

1. Go to the **View/Update System Qualifications** pane in the lower half of the window.
2. Scroll down the page, and click the button.

3. @CUMEN adds the information in the **Other Details** box on the **View/Update Expert's Qualifications** pane to the system qualifications. Check the information is correct. If the expert has used the **Other** option in more than one field, @CUMEN may not be able to determine which information to add to the system qualifications.
4. Click the  button in the **View/Update System Qualifications** pane to save your changes.
5. You can now select the qualification from the system list in the **View/Update Member's Qualifications** pane in the upper half of the window.



If the expert has used the **Other** option in more than one field, you can only add one of those options here. To add the other, use the Add qualifications option on the main menu.



You can also add system qualifications from the main menu.

Deleting an expert's qualification

To permanently delete an expert's qualification:

1. Open the member's details.
2. Go to the **Expert details** section on the **View/Update Member Details** page. Click on **Qualifications**.
3. Tick the **Delete** checkbox next to the qualification.
4. Click the button to save your changes.



To temporarily delete an expert's qualification, clear the **Approved** checkbox next to the qualification.

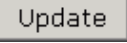
Reviewing an expert's skills

The **Skill Set** lists the expert's skills, knowledge and experience. Expert's submit and maintain this information themselves. Each skill set consists of a topic and one or more sub topics, e.g.


- Marketing
 - ERP Marketplace
 - CRM Marketplace

Experts can list as many topics as they wish. The Skill set can include topics that do not appear in the @CUMEN Hierarchy. @CUMEN adds the topics to the expert's keywords.

To view or update an expert's skill set:

1. If you have chosen to approve skills, @CUMEN displays a link at the bottom of the main menu when a member changes or adds skills to their expert details. Click the link to review the member's skills.
2. Go to the **Expert details** section on the **View/Update Member Details** page. Click on **Skill Set** to open the **View/Update Expert's Skill Set** window.
 1. Alternatively, open the member's details and go to the **Expert details** section, then click the **Skill Set** link.
3. Change or add new skills.
4. If you make any changes, click the  button to save them.

To add new skills to a Skill set:



1. On the **View/Update Member's Skill set** page, click an empty main topic field. Then type in a new topic. Type in any sub topics.
2. If you make any changes, click the  button to save them.
3. When you have finished adding skill sets, close the window.

Reviewing profiles

Members must create both brief and full profiles to become an expert. The brief profile is a summary of their work and life experience. The full profile contains more detail. Other members can see both profiles as soon as the expert creates them.

The administrator can view or change both brief and full profiles.

To view or change an expert's profiles:

1. If you have chosen to approve profiles, @CUMEN displays a link at the bottom of the main menu when a member changes or adds profiles to their expert details. Click the link to review the member's profiles.
2. Go to the **Expert details** section. Click the  icon against the **Full profile** or **Brief profile** fields to see how the profile appears to other members.
3. You can change the text in the **Full** or **Brief** profile fields. For example, you might want to correct spelling or punctuation.
4. When you have finished, click the  button to save the changes.



Both the full and brief profiles appear as simple running text in @CUMEN. They do not contain formatting such line breaks, blank lines, bold, underline and italic fonts, etc. The administrator can add a formatted full profile to an expert's details.




Adding a formatted profile

Both the full and brief profiles can contain basic formatting such as line breaks and blank lines. An administrator can also use HTML to create more advanced formatting, such as different fonts, bold, italic, underline, and tables.



Advise experts that they can upload HTML-formatted versions of their full profiles.

To add a formatted profile:

1. Go to the **Members & Membership** section of the main menu.
2. Click on **Advanced Account Management**. Against **Enter field to update**, click  and click **Expert's Full Profile**.
3. Enter the member's number. How do I find the member's number?
4. Click the  button.
5. Cut and paste the expert's formatted version of their profile into the **Enter formatted version here:** text box.
6. Click the  button to view the profile in your web browser.
7. Close the browser window. Show me
8. Click **Return to Admin Menu** on the **Format Expert's Full Profile** page to return to the main menu.



The formatted profile should only contain tags that are allowed in the body of an HTML document. See the online help for the full list.

- When an expert uploads a new copy of their full profile, it overwrites the formatted profile. Remind them to also send you a new HTML formatted version.

Reviewing an expert's web site

Experts can include a link to their web site in their profile. They can use their web site to provide extra information to members.



The administrator can choose to approve web sites before they appear in experts' public profiles.

@CUMEN creates and tests the link.



Check that the web site name is correctly formed. It should begin with http://



To approve a web site:

1. Go to the **Expert details** section on the **View/Update Member Details** page.
2. Go to the **Website** field.
3. To check the link is correct, click  to view the web site in a new browser window.
4. Tick the **Approved** checkbox next to the **Website** field.
5. Click the  button to save the changes.
6. Click **Return to Admin Menu** to return to the main menu.

Displaying experts flags

The administrator can set @CUMEN to display flags for all experts. This may be useful if your company has offices in several countries.

To display flags for all experts:

1. Go to the **Members & Membership** section of the main menu.
2. Click **Set experts flags**. @CUMEN displays a list of countries that experts have included in their profiles.
3. Click  and select the country flag to use from the dropdown list.
4. Click the  button.
5. @CUMEN tells you how many flags it has set.
6. Click **Return to Admin Menu** to close the member's details and return to the main menu.




Contact Technical Support if you need to add a country's flag to this list.

Finding out who likes/dislikes a specific expert

Members can indicate their favourite and least favourite experts.

To find out which members like or dislike a specific expert:


1. Open the member's details. Show me
2. Go to the **Expert details** section on the **View/Update Member Details** page.
 - To find out which members have listed the expert as a favourite, click **Who likes him/her?**
 - To find out which members have listed the expert as a least favourite expert, click **Who doesn't like him/her?**
3. @CUMEN opens the **List Favourites** window. Notice how the your option is already ticked in the **Listing** search options. For example, if you click **Who likes him/her?**, the option **Is a Favourite Expert** is ticked.
4. Click the  button to search for the relevant members.
5. @CUMEN displays a list of the relevant members.
6. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Hiding experts from searches

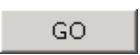
The administrator can hide experts so that they do not appear when members search for experts to answer their questions. Members can still see the expert when they browse for experts.

What do you want to do?

To make an expert non-searchable:

1. Go to the **Housekeeping & Reporting** section of the main menu.
2. Click **View/Update full text searches**. @CUMEN opens the **View/Update Full Text Searches** page.
3. In the **Expert Details** section, click **Make the following expert's details non-searchable**, and enter the member's number. How do I find the member's number?
4. Click the  button.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

To make an expert searchable:

1. Go to the **Housekeeping & Reporting** section of the main menu.
2. Click **View/Update full text searches**. @CUMEN opens the **View/Update Full Text Searches** page.
3. In the **Expert Details** section, click **Make the following expert searchable again**, and enter the member's number.
4. Click the  button.

Click **Return to Admin Menu** to close the member's details and return to the main menu.

Finding out which experts are logged in

The administrator can check which experts are logged in to @CUMEN. This is useful:

- To check who is using the system
- To log out experts who have forgotten to log out, particularly if they are on call. If members do not use @CUMEN for a certain period of time, their connection will expire and they will no longer be available, even though they appear to be logged in.

To find out which experts are logged in:

1. Go to the **Miscellaneous** section of the main menu.
2. Click on **Search/Update Logged in Experts**. You can narrow your search using the following search criteria:
 - **Date Logged In:** Enter a start and end date to search for the member using the dates they logged in and/or out of @CUMEN.
 - **Period Logged In For:** Click then click an option from the dropdown list. For example, *6 hours or more*
3. Click the button.
4. On the **Search/Update Logged in and On call Experts** page:
 - Click a member's name to open the **View/Update Member's Details** page. Close the page to return to the **Search/Update Logged in and On call Experts** page. Show me
 - Tick the **Terminate** checkbox against the member's name to log them out of @CUMEN.
5. Click the button.
6. Click **Return to Admin Menu** to return to the main menu.

Managing live consultations

A member can request a live consultation with an expert who is logged in or on call. An expert can also answer a member's question using a live consultation. The administrator can:

- **Prevent an expert from holding live consultations.** This means the expert cannot hold live consultations with anyone.
- **Allow or prevent member's requesting live consultations with a specific expert.** This only prevents any member from requesting a live consultation with a particular expert. The expert can still offer to answer a question with a live consultation.

To prevent an expert from holding live consultations:

1. Open the member's details.
2. On the **View/update Member details** page, go to the **Account details** section.
3. Against **Live consultations**, check the **NotAllowed** button.
4. Click the **Update** button to save the changes.
5. Click **Return to Admin Menu** to close the member's details.

To allow or prevent members from requesting live consultations with a specific expert:

1. Go to the **Members & Membership** section of the main menu. Click **Advanced Account Management**.
2. On the **Advanced Account Management** page, click against **Enter field to Update**, and click **Allow Requested Live Consultations** on the dropdown list.
3. Enter the member's number.
4. Click the **Fetch** button.
5. Tick one of the following options on the **Advanced Account Management** page:
6. Allow member's to request live consultations with this expert
7. Prevent member's from requesting live consultations with this expert
8. Click the **Update** button.
9. @CUMEN confirms your changes.
10. Click **Member Details** to return to the **View/Update Member Details** page.
11. Click **Return to Admin Menu** to return to the main menu.

About the rating system

Members can rate:

- Answers they have received to questions they have posted
- KnowledgeBase answers and library documents

Experts with higher ratings appear earlier in lists, for example when inquisitors browse or search for experts to answer their questions. The rating system also helps members evaluate experts' answers to their questions and gives valuable feedback to experts.

The highest rating is 10/10, the lowest is 0/10. **Not Rated** indicates that experts have not received any ratings for their answers.

The administrator cannot change an expert's rating.

To find out an expert's overall rating:

1. Open the member's details.
2. Go to the **Rating** field in the **Expert details** section. @CUMEN lists the expert's rating. It also tells you how many questions the expert has answered, and how many categories they have listed in their areas of expertise.
3. Click **Return to Admin Menu** to close the member's details.

To find an expert's rating in a specific category


1. Open the member's details.
2. Click the **Areas of Expertise** link. The **View/Update Areas of Expertise** page opens. It lists the expert's ratings under each category, if they have been rated.
3. Close the **View/Update Areas of Expertise** page.
4. Click **Return to Admin Menu** to close the member's details.

Reviewing an expert's ranking

An expert's ranking affects where they appear in lists, for example, when members browse or search for experts. The higher their ranking, the higher they appear in the list. The number of areas of expertise an expert declares and the rating they receive from inquisitors also affect where they appear in lists. Those with fewer areas of expertise appear higher in lists.

By default, @CUMEN gives the same ranking to all experts. The administrator can change an expert's ranking. For example, you might want to encourage members to consult a new expert who has valuable knowledge or skills.

To view or change an expert's ranking:

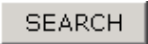
1. Open the member's details. Show me
2. Go to the **Expert details** section on the **View/Update Member Details** screen. In the **Ranking** field, enter a lower number to improve an expert's ranking, or enter a higher number to reduce their ranking.
3. Click the  button to save the changes.
4. Click **Return to Admin Menu** to return to the main menu.



Remember, enter lower values to move the expert higher up the list, higher values to move them down the list.

Finding groups of members

To find groups of members:


1. Go to the **Members and Membership** section of the main menu.
2. Click **Search Members** to open the **Search members** page.
3. Click in any field to enter your search criteria.
4. To limit your search, tick the checkboxes in the **Limit to** section of the page.
5. Click the  button.
6. @CUMEN displays a list of the members who satisfy your search criteria.
7. Click on a member's name on the list to open their details.



- Tick the **All except the above members** checkbox to exclude members that satisfy your search criteria. For example, enter 'Jones' in the name field, then tick the **All except the above members checkbox**. @CUMEN displays all members who are not called 'Jones'.
- With some browsers you can open several members details in different windows. Hold the mouse pointer over an expert's name, then right click to open the member's details in a new window.

Finding a specific member

To find a specific member:

1. Go to the **Members and Membership** section of the main menu.
2. Click **Search members** to open the **Search members** page.
3. Enter the information you have. This might be a last name, first name, or phone number. For example, to search for a member whose last name is "Jones", type *Jones* in the **Name** field.
4. Click the  button.
5. If only one member matches your search, @CUMEN opens that member's details. Otherwise, @CUMEN displays a list of members that match your search criteria.
Show me
6. Click on a member's name on the list to open their details.

3 The Hierarchy & categories

About the Hierarchy

The @CUMEN hierarchy makes it easier to find information. It does this by breaking information down into categories. Conventional libraries use a similar reference system to enable you to find information on precisely the subject you want to know more about.

Categories appear at the top level of the hierarchy. For example, *Computers & the Internet* is a category. Categories break down into subcategories, which contain smaller, more specific chunks of information. So you might have *Computers & the Internet > Programming & Languages > C & C++*

The administrator builds the hierarchy by linking categories.

The administrator can:

- Add new categories and subcategories to the hierarchy
- Create keywords for categories
- Link categories or subcategories

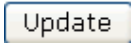
Members can request new categories and sub-categories. The administrator must review and approve new categories before they become available to other members.

Using browse hierarchy options

Use the browse hierarchy options to indicate:

- Which top-level categories to show on the main home page
- Which subcategories to show in the root of the hierarchy

To indicate which top-level categories to include on the main home page:


1. Go to the **Categories & Postings** section of the main menu.
2. Click **Define Hierarchy Options** to open this page:
3. Tick the **Include in home page?** checkbox against the category name.
4. Click the  button.
5. Click **Return to Admin menu** to return to the main menu.


Indicating which subcategories appear in the root of the hierarchy

When members browse the @CUMEN Hierarchy, they see each top-level category, followed by several subcategories. The administrator can indicate which subcategories appear.

To indicate which subcategories appear:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **Define Hierarchy Options** to open this page:
3. Under **Include in hierarchy root?**, tick the checkboxes against the subcategories you want to display under a top level category when members browse the hierarchy.





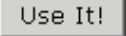
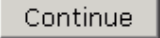
4.  5. Tick the ... option ... in the hierarchy root to show members that there are more subcategories. You will find this option at the end of each list of subcategories.

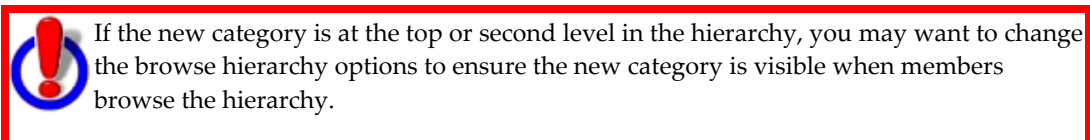
6. Click the  button.
7. Click **Return to Admin menu** to return to the main menu.

Adding categories

The administrator can add categories to the @CUMEN hierarchy.

To add a category to the hierarchy:

1. Go the **Categories & Postings** section of the main menu.
2. Click **View/Update Hierarchy**.
 - To add a top level category, navigate to the hierarchy root and click the  button.
 - To add categories below the top level, navigate to the category below which you want to add a new category, then click  and click **Add New Category** on the dropdown list, then click .
3. @CUMEN opens the **Add New Category** page. Enter the:
 - **Category Name** - The name that appears in the hierarchy.
 - **Description** - This should be as complete as possible, but at least a proper sentence.
 - **Keywords** - Additional keywords, separated by commas.
4. To link to other categories, click  then click CHANGE... to open the **Select category** window. To create the link, navigate to the category and click the category name. Click the  button. @CUMEN creates the link and closes the **Select category** window.
5. Click the  button to save the new category. @CUMEN confirms that it has added the new category.
7. Click **Return to the Hierarchy** to continue adding categories.
8. Click **Return to Admin menu** to return to the main menu.





Linking categories

The @CUMEN hierarchy works in the same way as a family tree. Each category has a parent category directly above it. For example, *Home > Shopping* is the parent category for *Auctions* (*Home > Shopping > Auctions*).



The administrator can also create or change additional links to other categories within the hierarchy. A category can only have one parent category, but it can have links to many categories.

@CUMEN displays a category's links in the **Linked to** fields in the **Edit Category** window.

To create or change links between categories:

1. Open the category in the **Edit Category** window. Show me
2. In the **Link to** fields, click  then click **CHANGE...** on the dropdown list to open the **Select category** window. This is where you change the category's links to other categories or subcategories in the hierarchy.
3. Click the  button to save the changes.

To delete a link:

1. Open the category in the **Edit Category** window.
2. In the **Link to** fields, click  then click the empty line after **CHANGE...** on the dropdown list.
3. Click the  button to save the changes.

Copying categories

The administrator can copy an existing category or subcategory to a different location in the hierarchy, retaining its keywords and links.



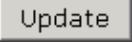
To copy a category:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **View/Update Hierarchy**.
3. Click on the top-level category that contains the category you want to edit.
4. Continue to click through the category levels until you find the category you want to copy. Click and click **Edit This Category...** on the dropdown list.
5. Click the **GO!** button. @CUMEN opens the **Edit Category** page.
6. At the bottom of the page, click against **Save to:**, then click **CHANGE...** on the dropdown list.
7. @CUMEN opens the **Select Category** page. Navigate to the category under which you want to place the copy of the current category.
8. Click the **Use It!** button. @CUMEN returns to the **Edit Category** page. The new category location appears in the **Save to:** field.
9. Click the **Update** button.
10. Click **Return to the Hierarchy** to continue working with categories.
11. Click **Return to Admin Menu** to return to the main menu.

Editing a category

The administrator can change category names and descriptions, add keywords and change a category's parent category and links.

To edit an existing category:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **View/Update Hierarchy**.
3. Click on the top-level category that contains the category you want to edit.
4. Continue to click through the category levels until you find the category you want to edit. Click  and click **Edit This Category...** on the dropdown list.
5. Click the  button. @CUMEN opens the **Edit Category** page. This is where you can change the:
 - **Category Name** - The name that appears in the hierarchy.
 - **Description** - This should be as complete as possible, but at least a proper sentence.
 - **Keywords** - Additional keywords, separated by commas.
 - **Links**
5. Click the  button to save your changes.
6. Click **Return to the Hierarchy** to continue working with categories.
7. Click **Return to Admin Menu** to return to the main menu.

Hiding categories

The administrator can hide categories. Members cannot see hidden categories when they browse the @CUMEN hierarchy. You must hide categories before you can delete them.

You can only hide a category if:



Condition	More information/online Help topics
It does not appear in the system home page or the hierarchy root	Clear the Include in Home Page and Include in hierarchy options checkboxes in the browse hierarchy options. 'Reviewing browse hierarchy options'
It has no visible subcategories	It can contain hidden subcategories.
No other categories link to it	'Linking categories'
It is not any member's favourite category	'Listing members' favourite categories'
No experts have declared expertise in the category	
No questions have been posted in the category	
You set the Allow sensitive deletes global setting.	'About system settings'
There are no suggested categories that link to it or that are waiting to be added underneath it in the hierarchy	'Reviewing categories suggested by members'

If you try to hide a category that does not satisfy these conditions, @CUMEN will tell you why it cannot hide the category.

To hide a category:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **View/Update Hierarchy**.
3. Click the top-level category that contains the category you want to hide. Continue to click through the category levels until you find the category you want to hide.
4. When you find the category you want to edit, click in the dropdown field, then click **Make this Category Invisible**.
5. Click the **GO!** button.
6. To hide the category, click the **Confirm Make Invisible** button.
 - @CUMEN only hides the category you selected.
 - If the category has subcategories, @CUMEN alerts you that those subcategories are still visible.

7. Click **Return to the Hierarchy** to continue working with categories.
8. Click **Return to Admin menu** to return to the main menu.




 To make a hidden category visible, click  in the dropdown field, then click **Make this Category Visible**.

Deleting categories

The administrator can delete categories from the @CUMEN hierarchy if:

- It is hidden
- It does not have subcategories (delete them first)
- The **Allow sensitive deletes** global setting is set Show me


To delete a category:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **View/Update Hierarchy**.
3. Click the top-level category that contains the category that you want to delete. Continue to click through the category levels until you find the category to delete.
4. Click  in the dropdown field, then click **Delete this category**. If the category has not been made invisible, you will not see the **Make this category invisible** option instead.
5. Click the  button.
6. Click the  button to save the changes.
7. Click **Return to the Hierarchy** to continue working with categories.
8. Click **Return to Admin menu** to return to the main menu.

Selecting categories

The **Select Category** page opens in a new window when you need to select an existing category from the hierarchy, for example, when you link one category to another.




To select a category:

1. On the **Select Category** page, navigate to the category you want to use, then click the  button.
2. @CUMEN closes the **Select Category** window.

Listing members' favourite categories

Members can create a list of links to favourite categories on **My HomePage**. The administrator can create a list of members who have chosen a category as one of their favourites.

To list favourite categories:

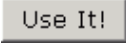
1. Go to the **Categories & Postings** section of the main menu.
2. Click **View/Update Hierarchy**.
3. Navigate to the category you are interested in. Click  and click **Show Favourites** on the dropdown list.
4. Click the  button to open the **List Favourites** page.
5. Click the  button to list the members who have listed the category as a favourite category.
6. Click **Return to Admin Menu** to return to the main menu.

Reviewing categories suggested by members

Anyone who uses @CUMEN can suggest categories to add to the @CUMEN hierarchy. The administrator must always review and approve categories before they become available to @CUMEN members.

@CUMEN displays an alert below the main menu when there are new categories to review. You can also list suggested categories and those that have already been reviewed.

To review new categories suggested by members:

1. Click the **reviewed** link on the main menu:
Or:
 - Go to the **Categories & Postings** section of the main menu.
 - Click **List Suggested Categories**. @CUMEN displays a list of categories that have been reviewed by the administrator.
 - Scroll down to the bottom of the screen and click **Review new category suggestions**.
2. @CUMEN displays a list of new categories suggested by members.
3. Click on a category name to review the suggested category. @CUMEN opens the **Review New Category Suggestion** page. Go to the **Actual Category Details** section.
4. To move the category to a different parent category, click against **Parent category**, then click **CHANGE...** on the dropdown list.
 - On the **Select Category** page, navigate to the category below which you want to move the suggested category. To move the suggested category, click the  button.
 - On the **Review New Category Suggestion** page, check that the **Parent category** field contains the new location.
5. Change the following fields, if you need to:
 - **Intervening Categories** - Members can suggest categories they want to appear between the category they suggest and the existing higher level category. The administrator can also create intervening categories. *Why would I do that?*
You may find it useful to add intervening categories even if a member does not suggest them. Doing so may help you position the category appropriately in the hierarchy.
 - **Category Name** - The name that appears in the hierarchy.
 - **Description** - As full a description as possible. At last a complete sentence.
 - **Keywords** - additional keywords, separated by commas.
6. You can also link the new category to other categories in the hierarchy. Show me

7. To add the suggested category to the hierarchy, tick the **Add to Hierarchy** checkbox, then click the button.
8. @CUMEN confirms that the new category has been added to the hierarchy. If the new category or its parent category is a top level category, the system prompts you to review the hierarchy options.
9. If you want to, click the button to send a message to the member who suggested the category. Tell them if you did or did not add the category.
10. The **Send Message** page opens. Change the message it contains, if you need to. Notice that the message contains a link which the member can click to view the new category in the hierarchy, if you added it.
 - Tick the **Allow Reply** checkbox if you want the member to be able to reply to your message.
11. Click the button. @CUMEN confirms that your message has been sent.
12. Click **Return to Admin Menu** to return to the main menu.

To list suggested categories that have been reviewed:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **List Suggested Categories**. @CUMEN displays a list of categories that have been reviewed by an administrator.
3. Click a category name to open the category in the **Review Old Category Suggestion** page.
 - To approve a category that the administrator has rejected:
 - Make any changes you need to, as you would when initially reviewing categories suggested by members.
 - Tick the **Add to the Hierarchy** checkbox. To add the category to the hierarchy, click the button.
 - To delete a category suggestion:
 - Tick the **Delete this category suggestion** checkbox and click the button.
4. Click **Return to Admin Menu** to return to the main menu.

4 Questions

About the KnowledgeBase

The @CUMEN KnowledgeBase is an archive of questions that experts have answered. Members can search and browse the KnowledgeBase to find the information they need. If their question has already been answered, this is much faster than posting a question on @CUMEN.

Both the member who asked the question and the expert who provided the answer must agree to add an answered question to the library.

Answered questions typically expire after a period of time. Members cannot search expired questions.

Searching for outstanding questions

Outstanding questions are questions that have not been answered, or ones where the member is still waiting for an acceptable answer.

Ensuring that questions are answered encourages members to use @CUMEN to find out what they need to know.

Searching for outstanding questions regularly helps ensure that questions are answered. Once the administrator knows what information people are looking for, they can:



- Update the page banner displaying the information required from members. This also encourages members to declare their expertise
- Use e-mail or the messaging system to prompt individual experts to answer outstanding questions

To search for outstanding questions:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **Search Postings**.
3. On the **Search Postings** page, enter any of the following search criteria to narrow down your search:

Search criteria	Description/More information
Submitted between ... and ...	Enter a date range. The earliest date in the first field, the latest date in the second field. Use the date format dd/mm/yyyy. For example, 20/01/2003 for 20 January 2003.
Inquisitor	The member number of the member who asked the question(s).
Expert	The member number of the expert who has been asked to answer the question(s).
Title	Words or phrases from the question title.
Question text (or document description)	Words or phrases from the question text.
Responses	Click <input type="checkbox"/> and click an option: <ul style="list-style-type: none">• List questions with no responses• List questions with one or more responses
Status	Click <input type="checkbox"/> and click an option to indicate the status of the question. The options are: <ul style="list-style-type: none">• Not submitted An inquisitor has saved the question, but has not yet submitted it• Normal An inquisitor has submitted the question• On Hold An inquisitor has saved the question, but has temporarily made it

Search criteria	Description/More information
	<p>invisible</p> <ul style="list-style-type: none"> • Expired The question has expired. It may or may not have been answered • Pending answer A member has selected an expert to answer their question, but the expert has not yet submitted their answer • Answered

4. In the **Search** field click  and click the **Outstanding Questions** option.
5. Click the  button.
6. @CUMEN displays a list of questions that have not been answered, or ones where the member is still waiting for a suitable answer.
7. Click on a question title to open the question on the **View Question Details** page.
Show me
8. Click **Return to Admin menu** to return to the main menu.



Searching for resolved questions

Resolved questions are questions that have been answered, or questions that the inquisitor deleted before they were answered. They may or may not have been added to the KnowledgeBase.

To search for resolved questions:

1. Go to the **Categories & Postings** section of the main menu.
2. Click **Search Postings**.
3. On the **Search Postings** page, enter any of the following search criteria to narrow down your search:

Search criteria	Description
Submitted between ... and ...	Enter a date range. The earliest date the question could have been submitted in the first field, the latest date in the second field.
Inquisitor	The member number of the member who asked the question(s).
Expert	The member number of the expert who answered the question(s).
Title	Words or phrases from the question title.
Question text (or document description)	Words or phrases from the question text.
Answer text (or document solution)	Words or phrases from the answer text.
Responses	Use these fields together or separately to refine your search. See the online help for examples.
Status	

4. In the **Search** field click  and click the **Resolved Questions** option.
5. Click the  button.
6. @CUMEN displays a list of questions that have been resolved. Click on a question title to open the question on the **View/Update Question Details** page.
7. Click **Return to Admin Menu** to return to the main menu.

Viewing questions



The administrator can open the **View Question Details** page in several ways:



To view question details from any page that contains a list of questions

Click on a Question Title:

- *On the View postings page when you search for outstanding questions, or resolved questions*
- *On the View Recent Questions page when updating information required from members*

If you have the question number:

1. *Click the View Question Details option in the Categories & Postings section of the main menu.*
2. *Against Select database, click  and click Resolved Questions or Outstanding Questions.*
3. *Enter the Question number.*
4. *Click the  button.*
5. *@CUMEN opens the question in the View Question Details page.*

 **TIP** To open another question, change the question number, then click the  button.

The **View Question Details** page contains the following information:

Field	Description
Date asked	The date the inquisitor asked the question.
Inquisitor	The member number of the member who asked the question, followed by their public name.
Category	The category where the member placed the question
Title	The question title
The Question	The question text
Attachment(s)	Details of any files the inquisitor attached to the question: <ul style="list-style-type: none"> • Name the file name • Size the file size • Searchable? Yes indicates that @CUMEN can search the file text Only one attached file can be searchable.
Expires	The date the question expires. A member can limit the amount of time the question remains on

Field	Description
	@CUMEN by specifying an expiration date. Never indicates that the member did not indicate an expiration date.
Eligibility	<p>Indicates which experts the inquisitor will allow to answer the question:</p> <ul style="list-style-type: none">• All eligible experts all experts who have declared their expertise within the same category as the question can answer• Favourites only the member's favourite experts can answer• Any eligible expert apart from the member's least favourite experts can answer <p>If any additional experts who may be able to answer the question have been identified, the results appear here. For example, <i>No additional experts (of 2 found) have been made eligible to answer the question.</i></p>
Options	<p>The options the member chooses when asking the question:</p> <ul style="list-style-type: none">• How they will select the answer• Whether they want to participate in a live consultation• If @CUMEN should notify the member by e-mail when someone answers the question• Whether to restrict viewing of full question details to eligible experts• Whether to add the question to the KnowledgeBase.
Activity	Indicates the date and time somebody last opened or rated the question.
Responses	The number of responses to the question. See Viewing answers.
Status	<p>The question status. This can be:</p> <ul style="list-style-type: none">• Not submitted An inquisitor has saved the question, but has not yet submitted it• Normal An inquisitor has submitted the question• On Hold An inquisitor has saved the question, but has temporarily made it invisible• Expired The question has expired. It may or may not have been answered• Pending answer A member has selected an expert to answer their question, but the expert has not replied• Answered

Viewing answers

To view answers:

1. Open the **View Question Details** page and click the number in the **Responses** field.
2. The **View Answers to Question** page opens. It contains the following information:

Field	Description
Date asked	The date the inquisitor asked the question.
Inquisitor	The member number of the member who asked the question, followed by their public name.
Category	The category where the member placed the question.
Title	The question title.
The Question	The question text.
Answer Number	The answer number.
Date Answered	The date the question was answered.
Expert	The name of the expert who answered the question. Click the expert's name to open their expert details.
The Answer	The expert's answer.
Attachments	Any documents or files the inquisitor attached to the question.
Rating	The rating the inquisitor gave to the expert's answer.
Options	Whether the inquisitor chose to add the question to the KnowledgeBase and if the inquisitor will accept/requires a live consultation.
Status	<p>The answer status. This can be:</p> <ul style="list-style-type: none"> • Not yet submitted - inquisitor has not yet accepted an expert's offer to answer the question. • More info requested - an expert has asked for more information. • Submitted An expert has submitted the answer, but the inquisitor has not yet accepted it. • Accepted - The inquisitor has accepted the expert's offer to answer the question, but the expert has not yet fcompleted their answer. • Completed - The answer has been submitted by the expert and accepted by the inquisitor.

5 Documents & uploaded files

About the Document Library

The @CUMEN Document Library is an archive of documents that members can search for answers to their questions. @CUMEN searches all text in uploaded documents. Experts can upload documents they believe will be useful to other members, and make the documents searchable.

The administrator can choose to review uploaded documents before they become available to other members.

@CUMEN can search the following document types:

Software/file type	Version
Adobe Acrobat (.PDF) PDF files that have security features enabled by the creator (such as encryption) may not be searchable	3, 4
Applix Word (.AW)	4.2, 4.3, 4.4
Corel Quattro Pro (.WB2)	7, 8
Corel Presentations (.SHW)	7, 8
Corel WordPerfect for Windows (.WPD)	5.x, 6, 7, 8
Corel WordPerfect for Macintosh	2, 3
Lotus 123 for DOS (WK1)	2, 3, 4, 5, 96, 97
Lotus Ami Pro (.SAM)	2, 3
Lotus Freelance (.PRZ)	96, 97
Lotus Word Pro (.LWP)	96, 97
MS Excel (.XLS)	3, 4, 5, 95, 97, 2000
MS Powerpoint (.PPT)	4, 95, 97, 2000
MS Rich Text Format (.RTF)	N/A
MS Word for Windows (.DOC)	2, 6, 95, 97, 2000
MS Word for Dos (.DOC)	4, 5, 6
MS Word for Macintosh	4, 5, 6
MS Write (.WRI)	1.0
Text files (.TXT, .HTML, .SGML, .XML)	N/A
XYWrite (.XY)	4.12

Listing uploaded files

Experts can upload the following types of files to the system:

- Their CV
- Documents to add to the @CUMEN Document Library.
- Files attached to answers

Inquisitors can attach files to questions.



When there are uploaded files waiting for review a link appears at the bottom of the main menu.

To list uploaded files:



1. In the **Housekeeping & Reporting** section of the main menu, click **List uploaded files**.
2. @CUMEN displays a list of files that have been reviewed by an administrator (if necessary) and uploaded. Click a file name to view the file details.
3. Click the underlined link in **List uploaded files** to return to the list of uploaded files.
4. To review files that are waiting to be reviewed by an administrator, click the underlined link in **List files waiting to be reviewed**.
5. Click **Return to Admin Menu** to return to the main menu.

Searching for documents

To search for documents:


1. Go to the **Categories & Postings** section of the main menu.
2. Click **Search Postings**.
3. On the **Search Postings** page, enter any of the following search criteria to narrow down your search:

Search criteria	Description
Submitted between ... and ...	Enter a date range. The earliest date the document could have been submitted in the first field, the latest date in the second field.
Expert	The member number of the expert who uploaded the document.
Title	Words or phrases from the document title.
Question text (or document description)	Words or phrases from the document description.
Answer text (or document solution)	Words or phrases from the document solution.
Responses	Leave blank.
Status	Leave blank.

4. In the **Search** field click  and click the **Documents & Resolved Questions** option.
5. Click the  button.
6. @CUMEN displays a list of questions that have been resolved and documents that have been uploaded.
7. Click on a question title to open the question on the **View/Update Question Details** page.
8. Click **Return to Admin Menu** to return to the main menu.

Opening & viewing documents

The administrator can open the **View Library Document** page from any page that contains a list documents. For example, you can click on a **Document Title** on the **View postings** page.

 To open the **View postings** page, use the **Search Postings** menu option on the main menu and search for document solutions.

If you know the document number of the document you want to view, you can also use the **View Document Details** option in the **Categories & Postings** section of the main menu.

The administrator can view the following information on the **View Library Document** page:

Field	Description
Date added	The date the expert uploaded the document solution.
Category	The category in which the document appears
Title	The document title
Description	A description of the document or the problem the document addresses.
Solution number	The document solution number.
Last updated	The date the file was last changed.
Expert	The expert who provided the document solution. Click the expert's name to view their details.
The solution	How the document solution addresses the problem.
The documents	The files included in the document solution, including the following details: <ul style="list-style-type: none">• Name the file name• Size the file size• Searchable? Yes indicates that Bumperbrain can search the file text Only one attached file can be searchable.
Rating	The document's rating.
Options	Various document options, including the document's availability in the Document Library.
Activity	Indicates the date and time a member or expert last opened or rated the document solution.
Status	The document status. This can be: <ul style="list-style-type: none">• Available Inquisitors can view the document solution.• Removed/Expired The document has expired or has been removed. A member can limit the amount of time the document remains on @CUMEN by specifying an expiration date.

Field	Description
	<ul style="list-style-type: none"><li data-bbox="591 241 1328 367">• Pending Review The expert has submitted the document. The administrator has chosen to review the document before it becomes visible to members. The administrator has not yet reviewed the document.



The administrator cannot delete documents from the Document Library. You can choose to have @CUMEN remove inactive documents, or the document owner can delete the document from the Document Library by setting the expiration date to **Now**.

Reviewing CV's & other files

Experts can upload the following types of files to the system:

- Their CV
- Documents to add to the @CUMEN Document Library.
- Documents attached to answers


Inquisitors can attach files to questions.

The administrator can choose to review these files before they become visible to other members.

@CUMEN displays a prompt below the main menu when there are experts' CV's, uploaded files, or other documents waiting for review.

To review an expert's CV or other uploaded files:

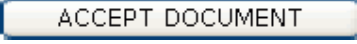


1. Click the **reviewed** link in the prompt below the main menu.
2. @CUMEN displays a list of files waiting to be reviewed.
3. Click an entry in the **Name** column. @CUMEN opens the **View Uploaded File** page, which contains information about the file.
4. Click the **File name** to view the file. Your browser opens and downloads the file.
5. To accept or reject the file:
 - Click the **ACCEPT FILE** button to add the file to @CUMEN
 - Click the **REJECT FILE** button to prevent the file being added to @CUMEN
5. Click **List files waiting to be reviewed** to continue reviewing files.
6. Click **Return to Admin Menu** to return to the main menu.

 **NOTE**

- Windows uses the file extension to determine which program to use to open the file. For example, files with the extension .doc open in Microsoft Word.
- @CUMEN stores experts' CV's in the experts profile. Uploaded documents are stored in the Document Library.

To review an uploaded document:

1. Click the **reviewed** link in the prompt below the main menu.
2. @CUMEN displays a list of documents waiting to be reviewed.
3. Click an entry in the **Title** column. @CUMEN opens the **View Library Document** page, which contains information about the document.
4. Click the document **Name** to open it.
5. To accept or reject the file:


- Click the  button to add the document to the Document Library.
 - Click the  button to prevent the document from being added to Document Library.
5. Click **List documents waiting to be reviewed** to continue reviewing documents.
 6. Click **Return to Admin Menu** to return to the main menu.
- 
 - Windows uses the file extension to determine which program to use to open the document. For example, files with the extension .doc open in Microsoft Word. If you don't have the appropriate software, you will not be able to open and view the uploaded document.

Indexing & publishing CV's




@CUMEN indexes expert's CV's by searching through them and picking out keywords that define the expert's skills and knowledge and areas of expertise.


- Indexing makes the CV searchable.
- Publishing makes the CV visible to other members.

When they upload their CV, members specify if they want their CV to be indexed and published, or only indexed. The administrator can also index and publish an expert's CV. For example, you might want to index and publish an expert's CV if they have sent it directly to you, rather than uploading it to @CUMEN.

 You will need the member's number to continue.

To index and/or publish an expert's CV:

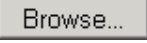
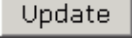
1. Go to the **Members & Membership** section of the main menu and click **Advanced Account Management**.
2. Against **Enter field to update**, click  and click **Expert's CV properties** on the dropdown list.
3. Against **Enter member number**, enter the member's number.
4. Click the  button.
5. @CUMEN opens the **Advanced Account Management** page. Notice that it displays a message telling you if the member has uploaded their CV.
6. Against **CV instructions**, click an option:
 - **Index & Publish the CV** makes the CV searchable and visible to other members
 - **Index only** indexes the CV without publishing it. This makes the CV searchable, but hides it from other members
7. Click the  button.
8. @CUMEN confirms that the member's CV properties have been updated.

 You can choose to index and/or publish a member's CV even if they have not uploaded one yet. @CUMEN will index and/or publish the CV when they do, unless the member indicates otherwise.

Uploading an expert's CV




Experts can upload their own CV's. The administrator may occasionally need to upload an expert's CV for them.

To upload an expert's CV:

1. Ask the expert to send you their CV using e-mail.
2. Review the CV, if necessary.
3. Save the file containing the CV to your hard disk and note the filename and location.
For example, C:\TEMP\CV.doc
4. Open the member's details. Show me
5. Go to the **Expert Details** section of the **View/Update Member Details** page.
6. Against **CV**, click the  button.
7. In the **Choose file** dialog box, locate the CV and double-click the filename.
8. @CUMEN closes the **Choose file** dialog box and returns to the **View/Update Member Details** page.
9. Click the  button to upload the expert's CV.
10. Click **Return to Admin menu** to return to the main menu.

Deleting an expert's CV

To delete an expert's CV:

1. Open the member's details.
2. At the bottom of the page, click the  in the field to the left of the  button. Select **Delete Member's CV** from the dropdown list.
3. Click the  button.
4. @CUMEN confirms that the expert's CV has been deleted. You cannot restore the CV.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Listing uploaded images

Experts can upload their photos and other images. The administrator can list all uploaded images.

To list uploaded images:

1. In the **Housekeeping & Reporting** section of the main menu, click **List uploaded images**.
2. @CUMEN displays a list of images that have been reviewed by the administrator (if necessary) and uploaded. Click an image title to view the image.
3. Click **List uploaded images** to return to the list of uploaded images.
4. To review images that are waiting to be reviewed by the administrator, click the underlined link in **List images waiting to be reviewed**.
5. Click **Return to Admin Menu** to return to the main menu.





The administrator can choose to review uploaded images before they become visible to members.

Reviewing photos & other images




The administrator can choose to review photos and other images before they become visible to other members. @CUMEN displays a prompt below the main menu when there are experts' photos or other images waiting for review.

To review an expert's photo or other uploaded images:

1. Go to the main menu and click the **reviewed** link in the prompt.
2. @CUMEN displays a list of images waiting to be reviewed.
3. Click an entry in the **Name** column. @CUMEN opens the **View Uploaded Image** page, which contains information about the image.
4. Click **View Current** to open a pop-up window showing the image members currently see on @CUMEN.
5. You may need to resize the image and then upload the file using the **Upload** field. Depending on the global settings you have used may then need to approve the image:
 - Click the  button to add the photo to the expert's profile.
 - Click the  button to prevent the image being added to @CUMEN
6. Click **List images waiting to be reviewed** to continue reviewing images.
7. Click **Return to Admin Menu** to return to the main menu.

Deleting an expert's photo

To delete an expert's photo:

1. Open the member's details. Show me
2. Go to the **@CUMEN Details** section on the **View/Update Member Details** page.
3. At the bottom of the page click the  in the field next to the  button.
4. Select **Delete Member's Photograph** from the dropdown list.
3. Click the  button.
4. @CUMEN confirms that the expert's photo has been deleted. You cannot restore the photo.
5. Click **Return to Admin Menu** to close the member's details and return to the main menu.

Resizing photos

Images that are too large to fit in a browser window will not display correctly. The administrator can:

- Fix the size of all images that members upload to @CUMEN. This forces the web browser to display the image as the correct size. This may produce distorted images.
- Manually resize photos. This is the safest option, but takes more of your time.

To manually resize a member's photo:

1. Open the photo in the **View Uploaded Image** page. Show me
2. Right-click the photo and click **Copy** on the dropdown menu. This copies the file to the Clipboard.
3. Paste the image from the clipboard to your image editing software and resize it to 100 X 100 pixels.
4. Save the photo as a jpg file.
5. You will then need to upload the photo. You may also need to review the photo.

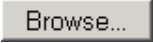
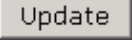


- For help using your image editing software, read the software documentation.

Uploading an expert's photo

Experts can upload their own photos. The administrator may occasionally need to upload an expert's photo for them.

To upload an expert's photo:

1. Ask the expert to send you their photo using e-mail.
2. Resize the image if necessary.
3. Save the file containing the photo to your hard disk and note the filename and location. For example, C:\temp\photo.jpg
4. Open the member's details. Show me
5. Go to the **Expert Details** section of the **View/Update Member Details** page.
6. Against **Photo**, click the  button.
7. In the **Choose file** dialog box, locate the photo and double-click the filename.
8. @CUMEN closes the **Choose file** dialog box and returns to the **View/Update Member Details** page.
9. Click the  button to upload the expert's photo.
10. Click **Return to Admin menu** to return to the main menu.



Images that are too large to fit in a browser window will not display correctly. The administrator can:

- Fix the size of images that members upload to @CUMEN. This forces the web browser to display the image correctly
- Manually resize photos

6 The Messaging system

About the @CUMEN messaging system


Members can use the @CUMEN messaging system to communicate with other members without using an external e-mail program (such as Microsoft Mail). This also means that they can keep their e-mail address private.

@CUMEN messages can include direct links to @CUMEN elements, such as questions, answers and uploaded files.


Sending messages

The administrator can use the @CUMEN Messaging system to send messages to individual members or groups of members.

To send a message to a single member using the @CUMEN Messaging system:

1. Open the member's details. Show me
2. Click **Send Message option** at the bottom of the page.
3. @CUMEN opens the **Send Message** page. Enter the subject and the message text.
4. Tick the **Send as formatted HTML** checkbox to use HTML formatting such as **bold**, italic, or underline. Only use this option if you are familiar with HTML formatting.
5. Tick the **Allow reply** checkbox if you want the member to be able to reply to your message.
6. Click the  button.
7. @CUMEN confirms that your message has been sent.
8. Click **Member details** to return to the member's details page. Or, click **Return to Admin menu** to return to the main menu.

To send a message to groups of members using the messaging system:

1. Go to the main menu.
2. Click **Send Message** on the **Members and Membership** menu.
3. @CUMEN opens the **Send Message** page.
4. Tick one or more checkboxes to send a message to:
 - **Members** - all members and experts
 - **Experts** - only members who are experts
 - **Inquisitors** - any member who can ask questions
5. Enter the subject and the message text.
6. Tick the **Send as formatted HTML** checkbox to use text formatting such as **bold**, italic, or underline.
7. Tick the **Allow reply** checkbox if you want members to be able to reply to your message.
8. Click the  button.
9. @CUMEN confirms that your message has been sent.
10. Click **Return to Admin menu** to return to the main menu.

Formatting messages

Messages can contain basic formatting such line breaks and blank lines. The administrator can also use *HTML* to create more advanced formatting, such as different fonts, bold, italic, underline, and tables.

Only use the following HTML tags to create formatted profiles:

<ADDRESS>...</ADDRESS>

...

<BLOCKQUOTE>...</BLOCKQUOTE>

<CENTER>...</CENTER>

<DIR>...</DIR>

<DIV>...</DIV>

<DL>...</DL>

...

<H1>...</H1>

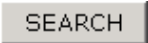
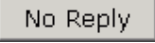



<H2>...</H2>

<H3>...</H3>

Searching messages

The administrator can search for messages sent and received by members or themselves, as well as new messages. For example, a member may ask you to trace a message that they believe they have sent to the wrong person.

To search for messages:

1. Go to the **Housekeeping & Reporting** section of the main menu and click on **Search messages**.
2. @CUMEN open the **Search Messages** page. Enter the information you have in the appropriate fields:
 - **Recipient:** Enter the member number of the person receiving the message. Leave blank to list all recipients.
 - **Sender:** Enter the member number of the person sending the message. Leave blank to list all senders.
 - **Message date:** Enter a date range. The earliest date the message could have been sent in the **Start** field, the latest date in the **End** field. Leave blank to list all message dates.
3. Select a button to search **Old Messages** or **New Messages**.
4. Click the  button.
5. @CUMEN displays a list of messages. Click a message title in the **Subject** column to open a message.
 - To return to the **Search Message** page without replying to the message, click the  button.
 - To reply to messages, click the  button.
 - Enter your message text, then click the  button.
 - @CUMEN confirms that your message has been sent.
 - To view more messages, click the  button.
6. Click **Return to Admin Menu** to return to the main menu.

7 Global settings

Reviewing global settings


Global settings affect the entire @CUMEN system. The administrator can view or change these settings.



To view or change global settings:

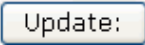
1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**.

You can review settings that affect:

- System maintenance and appearance
- Mail
- Logging in
- Searches
- Images
- Questions
- Experts
- Administrator reviews

3. Each time you change a setting, click the  button next to it to save your changes.
4. When you have finished, click **Return to Admin Menu** to return to the main menu.

-  • If you accidentally type in text, or select an option from a dropdown list, click the  button to undo your changes.

• You cannot undo your changes after you have clicked the  button against a setting.

About eligibility & similarity checks

When an inquisitor or the system searches for additional experts who may be able to answer an outstanding question, @CUMEN uses the Eligibility Checks global settings to define the search results.

When an inquisitor or the system searches for answered questions in the KnowledgeBase that are similar to an outstanding question, @CUMEN uses the Similarity Checks global settings to define the search results.

The administrator can use these settings to define which experts and KnowledgeBase questions appear in search results and lists.

Types of eligibility check

There are several types of eligibility check:

- **Expert:** @CUMEN suggests experts whose profile matches the question keywords and title with a given degree of relevance. For example, enter 45% to have the system suggest experts who are 45% relevant or more.
- **Document:** @CUMEN suggests experts who uploaded documents that match the question keywords or title with a given degree of relevance. For example, enter 45% to have the system suggest all experts who have uploaded a document that is 45% relevant or more.
- **Question:** @CUMEN suggests experts who answered any question in the KnowledgeBase that match the outstanding question's keywords and title with a given degree of relevance. For example, enter 45% to suggest all experts who have previously answered a question that is 45% relevant or more to the outstanding question.

Defining eligibility checks

To define eligibility checks:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings** to open the **Update Global Settings** page.
3. Use the **Eligibility Checks** options to indicate the additional sources of information you want @CUMEN to use, and control how @CUMEN identifies additional experts. Tick the buttons against the options you want to use. The options are:

Option	Description
Do not search for additional experts...	@CUMEN does not search for additional experts.
Do not search the @CUMEN Document Library	@CUMEN does not search the Document Library.
Do not search the @CUMEN KnowledgeBase	@CUMEN does not search the KnowledgeBase.

Option	Description
Suggest experts that match with a relevance of ...	@CUMEN suggests experts whose details match the question keywords or title. Enter a relevance value. For example, enter 45% to have @CUMEN list information that is 45% relevant or more.
Match documents that have a relevance of ...	@CUMEN suggests documents that contain the question keywords or title with a match of xx.
Match questions that have a relevance of ...	@CUMEN suggests questions that contain the question keywords or title with a match of xx.

4. Click the button to save your changes.
5. Click **Return to Admin Menu** to return to the main menu.

Defining similarity checks

The administrator can have @CUMEN display an alert to inquisitors that the system contains similar questions to the one they have asked.

To define similarity checks:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings** to open the **Update Global Settings** page.
3. Use the **Similarity Checks** options to indicate the what actions to take:




Option	Description
Do not search the KnowledgeBase for similar questions	@CUMEN does not search for similar questions.
Alert the inquisitor if any questions have a relevance of $A\%$ then list questions that had a relevance of $B\%$ or more	@CUMEN searches the KnowledgeBase for answered questions that match the keywords and title of the outstanding question and lists those that match with a given degree of relevance (B), or more. If any match with a degree of relevance above the value in A , @CUMEN alerts the inquisitor. A cannot be lower than B . To always alert the inquisitor, give A and B the same value. To reduce the list of results, increase B .

4. Click the  button to save your changes.
5. Click **Return to Admin Menu** to return to the main menu.

About system settings

To view or change global settings:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**. The administrator can view or change the following global settings that affect system maintenance:

Field	Options
System maintenance	<p>The administrator can shut down @CUMEN. For example, to backup the system.</p> <p>Click  then click an option in the dropdown list:</p> <ul style="list-style-type: none"> • Not scheduled • Soon... Stops members from logging in • Now! Shuts down @CUMEN immediately • Done! Restarts @CUMEN <div style="border: 2px solid yellow; padding: 5px; margin-top: 10px;">  To minimize any disruption, Run the Soon option to stop members from logging on, then wait a few minutes before running the Now! option. </div>
Page banner	<p>Click  then click an option in the dropdown list:</p> <ul style="list-style-type: none"> • List of information that is required An administrator can advertise topics that members have searched for, or asked questions about. <i>Show me</i> • None • Message of the day
Automated tasks	<p>To have @CUMEN send you an e-mail when it completes all automated processes:</p> <p>Enter your e-mail address in the Notify E-Mail Address field.</p> <p>Notify all tasks:</p> <p>Click Yes to have @CUMEN always notify you when it attempts to run a task, even if there is nothing to do.</p> <p>Click No to only receive notification when the task changes data.</p>
Allow Sensitive Deletes	<p>Click Yes to allow an administrator to delete critical information such as categories and member accounts.</p>


3. Click the  button to save your changes.

About e-mail settings

To view or change global email settings:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**. The administrator can view or change the following global settings that affect e-mail:

Field	Description
Administrator's E-Mail Address	All e-mail sent from @CUMEN is sent from the administrator's e-mail address. It may also appear on @CUMEN telling members how to contact the administrator.
(Send)Mail Server	The name of the mail server to use when sending e-mail from @CUMEN.


3. Click the  button to save your changes.
4. Click **Return to Admin Menu** to return to the main menu.

About log-in settings

To view or change global log-in settings:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**. The administrator can view or change the following global settings that affect log-ins:

Field	Description
Record User Logins	Click Yes to record user log-ins if you want be able to view a member's Login History.
Suggest alternative login name	Click Yes to have @CUMEN suggest an alternative login name if someone tries to use a name that already exists.
Record admin logins	Click Yes to have @CUMEN maintain a record of each time the administrator logs in.
Suspend failed logins	Tick Yes to have @CUMEN suspend a member's account if they enter incorrect login information 3 times in a row. @CUMEN alerts the administrator about failed login attempts, even if you do not select this option.


3. Click the  button to save your changes.
4. Click **Return to Admin Menu** to return to the main menu.

About search settings

To view or change global search settings:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**. The administrator can view or change the following global settings that affect searches:

Field	Description
Expert Search Limit	To limit the number of experts @CUMEN displays when members perform searches, enter a number in the Searches should return at most ... experts box. Or Tick the Searches should return all ... setting.
Document Search Limit	To limit the number of document titles @CUMEN displays when members perform searches, enter a number in the Searches should return at most ... documents box. Or Tick the Searches should return all ... setting.
Question Search Limit	To limit the number of KnowledgeBase questions @CUMEN displays when members perform searches, enter a number in the Searches should return at most ... questions box. Or Tick the Searches should return all ... setting.
Save Expert Searches	@CUMEN saves members' searches so that the administrator can use them to update the information required from members. If the administrator is not going to analyse searches to advertise for required information, click the No setting for all these options.
Save Document Searches	
Save Question Searches	


3. Click the  button to save your changes.
4. Click **Return to Admin Menu** to return to the main menu.

About image settings

Images that are too large to fit in a browser window will not display correctly. The administrator can:

- Manually resize photos. This is the safest option, but takes more of your time.
- Fix the size of all images that members upload to @CUMEN. This forces the web browser to display the image as the correct size. This may produce distorted images.

To fix the size of all images:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**.
3. Against **Fixed-Size User Images**, click one of the following options:
 - **Yes** to display all images at that fixed size of 100 x 100 pixels. ou may need to review uploaded images to ensure they are not distorted.
 - **No** to display all images exactly as they are uploaded. You may need to review and manually resize uploaded images to ensure they are an appropriate size.
4. Click the  button to save your changes.
5. Click **Return to Admin Menu** to return to the main menu.

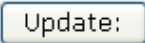
About question settings

To view or change global question settings:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**.

The administrator can view or change the following global settings that affect questions:


Field	Description
Lifespan in Library	To have @CUMEN remove questions from the @CUMEN KnowledgeBase after a certain period of time, click the Questions should expire after months button. Remember to enter the number of months! To prevent questions being automatically removed from the KnowledgeBase, click the Questions should not expire button.


3. Click the  button to save your changes.
4. Click **Return to Admin Menu** to return to the main menu.

About global expert settings

To view or change global expert settings:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**. The administrator can view or change the following global settings that affect experts:

Field	Description
Least favourite experts	<p>Click Enabled to allow members to indicate their least favourite experts.</p> <p>@CUMEN displays the  icon to indicate least favourite experts on any list of experts. For example, when a member browses or searches for an eligible expert to answer a question.</p> <p>Members can also choose to prevent their least favourite experts from answering when they ask a question.</p>

3. Click the  button to save your changes.
4. Click **Return to Admin Menu** to return to the main menu.

About administrator reviews


The administrator can choose to review specific information that experts upload to @CUMEN, before it becomes visible to other members, including:

- Expert details
- CVs
- Images
- Attachments
- Documents

To specify the type of administrator review you want to use:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings**.
3. In the **Administrator Reviewed** section, select the review options you want to use:

Option	Description
Required - must be approved manually	Experts can upload the information, but the administrator must review it before it becomes visible to members.
Enabled, but automatically approved	Experts can upload the information. It is visible to members immediately. @CUMEN notifies the administrator that the information has been uploaded and the administrator can still review it.
Disabled	Experts can upload the information. It is visible to members immediately. @CUMEN does not notify the administrator that the information has been uploaded.

4. Click the  button to save your changes.
5. Click **Return to Admin Menu** to return to the main menu.

Inactive experts, documents and questions

To speed up searches, the administrator can specify how @CUMEN handles inactive experts, documents and questions.

- Inactive experts are experts who have not answered a question for the number of months you specify.
- Inactive documents and questions are ones which have not been viewed or rated for the number of months you specify.

To specify how @CUMEN handles inactive experts, documents and questions:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update Global Settings** and go to one of the following sections:

Inactive Experts

To hide inactive experts when members search for experts to answer their questions:

- Click **make inactive experts non-searchable after**, and enter a number of months in the box.

This hides the expert from searches, but they remain visible when members browse for experts.

Inactive Documents

To hide or remove inactive documents from the Document Library, follow the steps below:

Step	Method
Define inactive documents	<ul style="list-style-type: none"> • Tick "Check for documents that haven't been..." • Click <input type="checkbox"/> and click an option on the dropdown list: <ul style="list-style-type: none"> • rated • accessed • Enter the number of months in the text box.
Specify what happens to inactive documents	<ul style="list-style-type: none"> • Click <input type="checkbox"/> in the second box, and click and option on the dropdown list: <ul style="list-style-type: none"> • make them non-searchable - hides the document from searches, but they remain visible when members browse the Document Library. The document becomes searchable again if an inquisitor opens or rates it. • remove them from the

Step	Method
	library - the expert is not visible when members search or browse documents.

Inactive Questions

To hide or remove inactive questions from the KnowledgeBase, follow the steps below:

Action	Method
Define inactive questions	<ul style="list-style-type: none">• Tick "Check for questions that haven't been..."• Click <input type="checkbox"/> and click an option on the dropdown list:<ul style="list-style-type: none">• rated• accessed• Enter the number of months in the text box.
Specify what happens to inactive questions	<ul style="list-style-type: none">• Click <input type="checkbox"/> in the second box, and click and option on the dropdown list:<ul style="list-style-type: none">• make them non-searchable - hides the KnowledgeBase question from searches, but they remain visible when members browse for questions. The question becomes searchable again if an inquisitor opens or rates it.• remove them from the library - the question is not visible when members search or browse questions.

Enabling & disabling the rating system

The administrator can enable or disable the rating system, or only have it visible to administrators.

To manage the rating system:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update global settings**.
3. Against **Ratings**, click and click an option:

Option	Description
Ratings are enabled and can be seen by everyone	All inquisitors can rate the answers experts provide to their questions. All members can see experts' ratings.
Ratings can only be seen by the administrator	All inquisitors can rate the answers experts provide to their questions. Only the administrator can see experts' ratings.
The rating system is disabled	Inquisitors are not asked to rate the answers experts provide to their questions.

4. Click the button to save your changes.
5. Click **Return to Admin Menu** to return to the main menu.

8 System tasks

Changing the administrator password

The administrator can change the password they use to maintain @CUMEN.



If you have more than one @CUMEN administrator, remember to let the others know that you have changed the administrator password!

To change the administrator password:


1. Go to the **Miscellaneous** section of the main menu.
2. Click **Change administrator password**.
3. Enter the current administrator password.
4. Enter the new password, then re-enter the new password.
5. Click the button.
6. @CUMEN confirms the password has been changed.
7. Click **Return to Admin menu** to return to the main menu.



If you see the message 'Password incorrect', try entering the current administrator password again.

Sending e-mail to all members

To send an e-mail message to all @CUMEN members:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Send global e-mail**.
3. On the **Send Global E-Mail** page, click one or more options against **To:**
 - **All members**
 - **All experts**
 - **All inquisitors:** All members who are not experts.
4. Enter a subject and the message text.
5. Tick the checkbox **Use the messaging system for members avoiding e-mail**, if required.
6. Click the  button.
7. @CUMEN confirms that your message has been sent.

Updating the list of qualifications

The administrator can update the list of qualifications that expert's can add to their expert details. You can add qualifications or change existing ones. You cannot delete qualifications.

Qualifications are made up of these components:

- The level of the qualification. For example, *BSc (Hons)*.
- The name of the University, college or other institution that awarded the qualification, For example, the *University of Glasgow*.
- The main subject studied. For example, *Botany*.

To update the list of available qualifications:

1. Go to the **Housekeeping** section of the main menu.
2. Click **View/Update System Qualifications**.

Adding a qualification

To add a qualification


1. In the **View/Update System Qualifications** window, click the component you want to add:
 - **Level**
 - **Subject**
 - **Institution**
2. Click the **Fetch** button to open a list of existing qualifications.
3. Scroll down to the bottom of the list, then enter the qualification level, subject or institution in the blank field at the bottom of the list.
4. Click the **Update** button to save your changes.
5. @CUMEN adds the qualification to the list of available qualifications.
6. Click **Return to Admin Menu** to return to the main menu.

Changing an existing qualification

The administrator can view or change existing qualifications. For example, you might want to correct a spelling error, or change capitalization. Think carefully before making major changes to existing qualifications, because members may have already listed them in their profiles.

To view or change an existing qualification:

1. On the **View/Update System Qualifications** page, click the component you want to view or change:
 - **Level**
 - **Subject**
 - **Institution**
2. Click the **Fetch** button to open a list of existing qualifications.

3. Change the qualification, then tick the **Update** checkbox against it.
4. Click the  button to save your changes.
5. Click **Return to Admin Menu** to return to the main menu.



Think carefully before making major changes to existing qualifications, because members may have already listed them in their profiles.

Updating the information required from members

One of your main roles is to increase the amount of information available on @CUMEN. To find out what topics your members find useful, and pick out topics that require more information, the administrator can search recent searches and questions. You can then advertise any or all of these topics to your members.

You can choose to display a request for information on one topic on the @CUMEN page banner. Members can find the requests for information for all topics on the **Are you an Expert** tab on the @CUMEN home page.


The request for information also appears in the **Information Required** section of **My HomePage** when members log in.

It useful because it:

- Prompts members and experts to share their knowledge with others
- Prompts members to declare their expertise and become experts
- Alerts members that there are questions they could answer
- Increases the amount of information available on @CUMEN
- Reminds experts of knowledge and information that they could add to their profile

The first step is to search for recent searches and questions. Then you can move on to advertising any of these topics to your members.

To update information required from members:

1. Go to the **Housekeeping** section of the main menu.
2. Click **View/Update Required Information**. @CUMEN opens the **View/Update Required Information** page.
3. Enter your search criteria in the **Analyze Recent Questions** and **Analyze Recent Searches** sections. See the online help for more information.
4. Click the  button.
5. @CUMEN opens a window split into two panes. The top pane contains the **View/Update Required information**, the bottom window contains **Recent Questions**.
6. Review the **Recent Questions** in the bottom pane.
 - To see all the question details in the **View/Update Question** page, click the **Question Title**.
 - To send the inquisitor a message, click the **Member** name in the **View/Update Question** page. @CUMEN opens the **View/Update Member's Details** page. Click **Send Message** at the bottom of the page.
 - Remember to close the **View/Update Question** page when you are done.


7. Click the **List Recent Searches** and **List Recent Questions** buttons to toggle between searches and questions. Use the **Next** and **Previous** buttons to scroll through the lists of searches and questions. Click the following to open a window containing more information (close the window when you are done):
 - **Question Title** to open the full question details.
 - **Member** name to open the member's full details. To send them a message, click **Send Message** at the bottom of the page.
8. If you decide not to add any questions or searches to the **Required Information**, click **Return to Admin Menu** to return to the main menu.
9. For each question or search that you want to add to the **Required Information**:
 - Click the **Use This!** button against the question or search.
 - Go to the **View/Update Required Information** pane. Change the information in the **Question**, **Member**, and **Information** fields if you need to. See the online help to find out what to enter in these fields.
 - Click the **Add:** button
10. When you have finished adding recent questions and searches, click the **Done** button in the **View Recent Questions** or **View Recent Searches** pane.
11. To update the topics shown on the @CUMEN home page:
 - Go to the **View/Update Required Information** pane and if any of the required information is important, tick the **Major Requirement** checkbox against the most important topics. You should only mark one or two pieces of information as important topics, particularly if you are advertising it on the page banner.
 - Change the **Label** at the top left of the window if you need to. This is the message that will introduce the list of required information.
 - Click the **Save Changes** button. @CUMEN confirms that it has updated the request for information message. Click the **here** link in the confirmation message to see how the request for required information will appear to members.
12. Click **Return to Admin Menu** to close both panes and return to the main menu.
13. To show the **Required information** on the page banner, use the global settings to set the **Page banner** field to show required information.

Updating the message of the day

The administrator can create a message to appear on the page banner at the top of every page in @CUMEN, or on a flag on the home page. For example, this might be a simple greeting, or a note to alert members that @CUMEN will close for maintenance at a specific time.

The administrator chooses to display the message of the day on the page banner in the system settings.

To update the message of the day:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Update message of the day**. @CUMEN opens the **View/Update Message of the Day** page.
3. Enter the **Header Text** and **Message Text**.
4. You can create links in the message of the day using the **Links** field. Show me, Contact Technical Support for help inserting links in the message of the day.
5. Click the  button.
6. @CUMEN confirms that the message of the day has been updated.
7. Click **Return to Admin Menu** to return to the main menu.



Remember to activate the message of the day in the system settings!

Managing automated processes

@CUMEN automatically runs maintenance processes at specific times. These processes are set up and scheduled for you when we install @CUMEN. If you need to change the times these processes run, please contact Technical Support.

Occasionally you may need to manually stop, start, or run one of these processes.

You can have @CUMEN send you the results of automated processes using global settings.

@CUMEN can run these automated processes:

Process	Description
Update the status of experts who have returned from holiday	If it is later than the date an expert specified they would return from holiday on the Expert Details page, @CUMEN updates their status. While on holiday, experts: <ul style="list-style-type: none">• Do not receive question alerts• Are not available to answer questions• Cannot go on call, or hold live consultations
Update the status of outstanding questions that have expired	@CUMEN does not display outstanding questions that have passed their expiration date when experts browse or search for outstanding questions.
Remove expired questions & documents from libraries	<ul style="list-style-type: none">• @CUMEN removes questions that have exceeded the Lifespan in Library specified in the global settings• @CUMEN removes documents that have passed the expiration date specified by the member who uploaded them Members can no longer search or browse for these questions or documents.
Refresh search text for the categories in the hierarchy	Recent changes to the hierarchy will appear in search results when members search for categories.
Refresh experts' search text	Recent changes to the expert's details will appear in search

Process	Description
	results when members search for experts.
Refresh search text for the KnowledgeBase	Recent changes to the KnowledgeBase will appear in search results when members search for questions and answers.
Refresh the search text for the Document Library	Recent changes to the Document Library will appear in search results when members search for documents.
We look for experts who may potentially be able to answer outstanding questions, and for questions in the @CUMEN KnowledgeBase that are similar to outstanding questions	<p>@CUMEN uses the global search settings to search for experts who might be able to answer outstanding questions still waiting to be answered, and to search for questions in the KnowledgeBase that are still waiting to be answered. The administrator will be alerted if any additional experts or similar questions are found.</p> <p>This process runs for each question:</p> <ul style="list-style-type: none"> • At the end of the day the question is posted • At the end of any day the inquisitor changes the question title or keywords • Once a week if the inquisitor does not change the question title or keywords • This process stops 6 weeks after the question is posted.
Archive or delete data that is no longer needed	<ul style="list-style-type: none"> • Does the following: <ul style="list-style-type: none"> • Archives administrator messages that have been read and are 1 month old • Archives user messages that have been read and that are 3 months old • Deletes reviewed images that are 6

Process	Description
	<p>weeks old</p> <ul style="list-style-type: none">• Deletes reviewed files that are 6 weeks old• Deletes old category suggestions that are 6 weeks old• Deletes login records that are 1 month old•• Deletes member history records from longer than 2 months ago• Deletes saved searches that are 6 months old
We check for and filter out inactive or underused information	Makes inactive or underused experts, documents and questions non-searchable.

Stopping and starting automated processes


To stop, start, and run automated processes:

1. Go to the **Miscellaneous** section of the main menu.
2. Click **Automated processes**.
3. The **Automated Processing** page lists the processes that are scheduled to run.
 - To run a process immediately, click the **Run Now** button
 - To run the process at the scheduled time, click the **Start** button
 - To prevent a process from running at the scheduled time, click the **Stop** button
4. Click **Return to Admin Menu** to return to the main menu.

NOTE The **Start** and **Stop** buttons work like switches. For example, once you have stopped a process, it will not run again until you click the **Start** button.


Updating full text searches


Members can search for experts, answered questions, documents, and categories to find out what they need to know. The administrator runs the **Update full text searches** routine to ensure searches are fast and search results are up to date.

 If your members are complaining that searches are slow, it's probably time to run the **Update full text searches** routine.

To update full text searches:

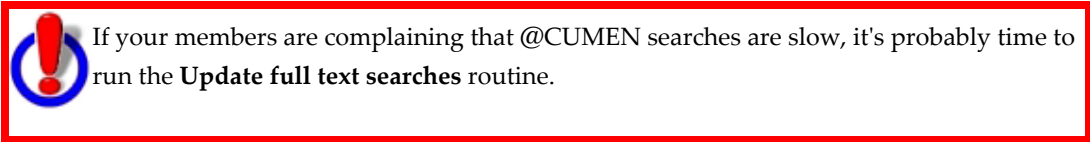
1. Go to the **Housekeeping & Reporting** section of the main menu and click the **View/Update full text searches** option.
2. @CUMEN opens the **View/Update Full Text Searches** page. Here you can update full text searches for:
 - Expert details
 - Categories in the hierarchy
 - The @CUMEN KnowledgeBase
 - The @CUMEN Document Library
3. Each section offers several options:

Option	Description
Create/Regenerate	Completely rebuilds the search text in a database (for example, the KnowledgeBase). It creates search text for new data (for example questions) and regenerates search text for existing data. This option can take a long time. Please contact Technical Support before using this option.
Refresh/Update	Updates existing items that have changed since the last time the full text was updated, either manually or by an automated process. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p> Use this option when you need to update existing items manually, rather than waiting for the automated process to do it automatically.</p> </div>
Optimise	Purges and reorganizes items so that searches run more quickly.
Repair	Repairs any corrupt items.

4. Click an option, then click the  button.
5. @CUMEN notifies you:
 - If the database did not need maintaining
 - If the routine ran successfully
6. Click **Return to Admin Menu** to return to the main menu.

Running Technical Support scripts

If you report a problem to @CUMEN Technical Support, our staff may ask you to run a script to diagnose or fix the problem.



To run the script:

1. Save the script we send you to your local hard disk.
2. If Technical Support ask you to go into maintenance mode:
 - Go to the **Miscellaneous** section of the main menu and click **Update Global Settings**.
 - Click **Soon...** to stop members from logging in
 - Wait a few minutes, then click **Now!** to shut down @CUMEN
3. Go to the **Miscellaneous** section of the main menu. Click **Technical Support**.
4. Follow the instructions on the **Technical Support** page to run the script we sent to you.


Examining login records

@CUMEN records the time and date each time a member logs in or logs out of the system. It also records the IP address of the computer the member uses.


To examine login records:

1. Go to the **Housekeeping & Reporting** section of the main menu.
2. Click **Examine login records**.
3. Use the fields on the **View Login/Logout Records** to find the information you need:

Field	Description
Member number	Enter a member number. Leave blank to see the login records of all members.
Date from ... to	Use the to and from fields to find the date range of the information you need. You can: <ul style="list-style-type: none">• Enter a value in both fields to specify a date range.• Enter a date in the From field and leave the to field blank to see all login records starting from a specific date.• Leave the From field blank and enter a date in the to field to see all login records from when the system was installed until a specific date.• Leave both fields blank to see all login records.

4. Click the  button to find the information you need.
5. @CUMEN displays a list of login records that contains the following information:


Column	Description
Member number	The member number of the member who logged in. Click the member number to open the member's details.
Logged in	The date and time the member logged in.
Logged out	The date and time the member logged out.
Remote address	The IP address of the computer that the member used to access @CUMEN. Talk to your network administrator to find out more about IP addresses.

4. Use the  button at the bottom of the list to scroll through the login records.
5. When you have finished, click **Return to Admin Menu** to return to the main menu.

Viewing activity reports

The administrator can create summary and detailed reports on @CUMEN activity.

To create reports:

1. Go to the **Housekeeping & Reporting** section of the main menu.
2. Click **View Reports**.
3. See the online help topic 'Viewing activity reports' to find out what information you need to enter for each type of report.
4. To display the report, click the  button.
5. Click **Return to Admin Menu** to return to the main menu.

