CONCLUSTER User Manual

All Concluster functions at a glance! In our user manual you will find more detailed explanations for all functions.

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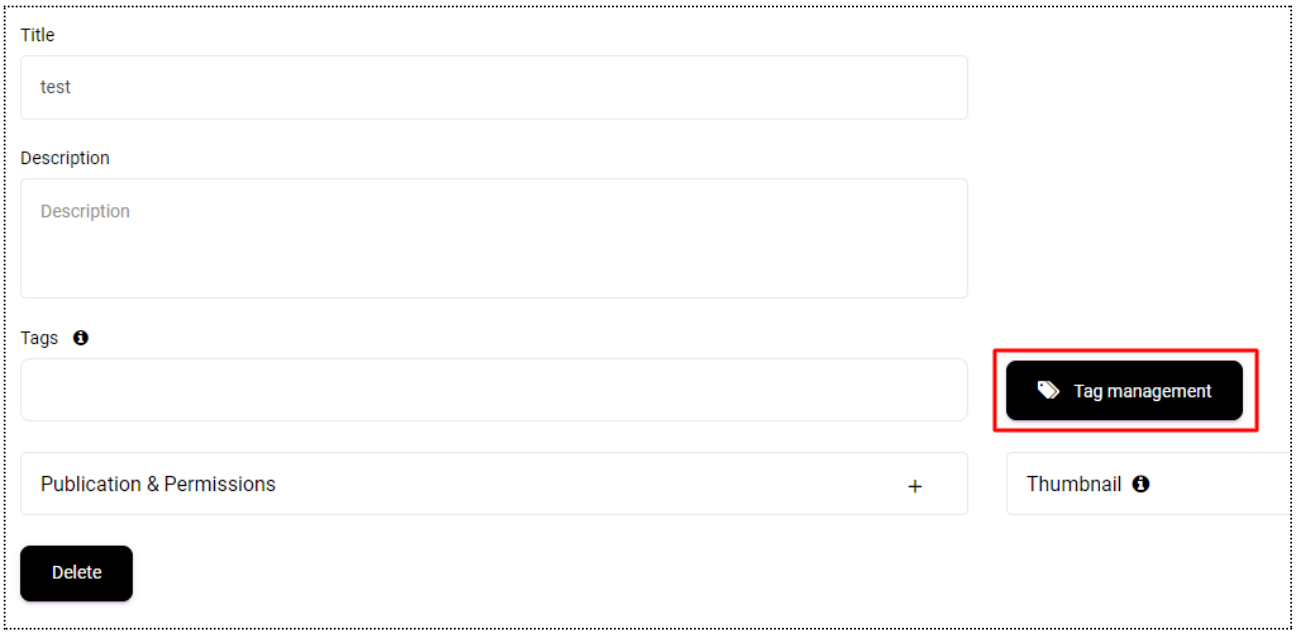
Cluster

A cluster is designed to display various content, documents, images or surveys and make them accessible to all members. You can share information, upload documents, create surveys, create appointments or upload videos in a cluster.

How to create a cluster:

1. go to the navigation item "Overview" and click on the plus to the left of the search bar.
2. define a suitable title for the content of the cluster
3. briefly describe the content of the cluster
4. select suitable tags for the content or create suitable tags in the tag management (for more information about the tag management, see "Tags")



5. select a suitable preview image so that it is immediately apparent what content is in the cluster.
6. select under "Publications & Permissions":
    a. whether the content should be published on the web,
    b. whether comments should be allowed
    c. who is the author
    d. for whom this content should be visible
    e. whether it should be published immediately or at a specific time

How to delete a cluster:

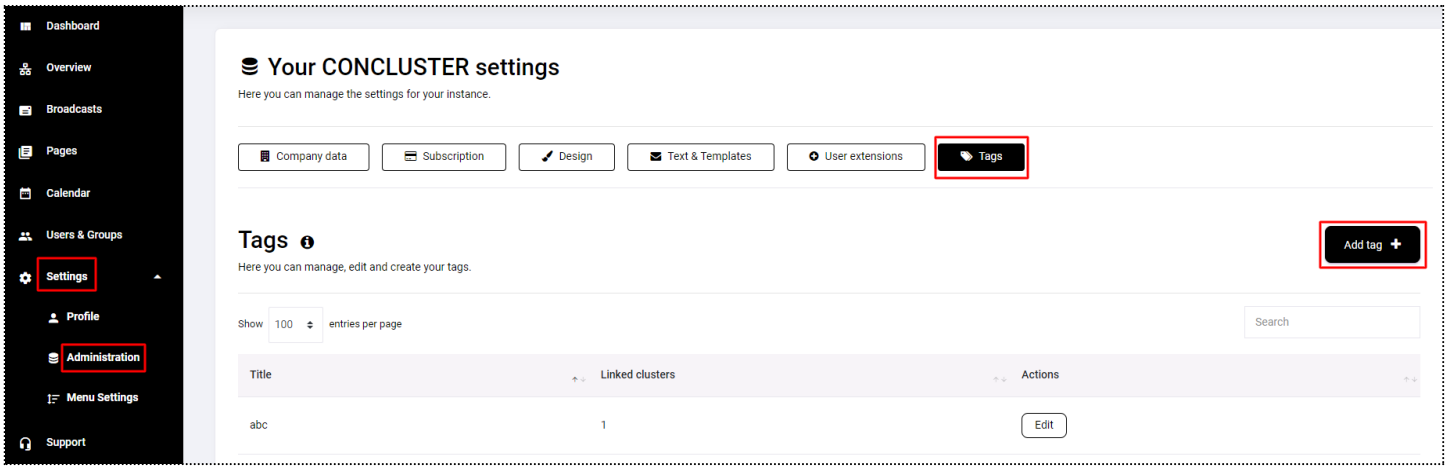
1. go to the navigation item "Overview" and press the button with the gear wheel
2. search for the cluster you want to delete
3. click on "Edit" > Delete

Tags

Tags provide structure to your clusters and can be compared to folders. A tag can be created for each subject area / company department and several clusters can be assigned to these individual tags.

How to create a tag:

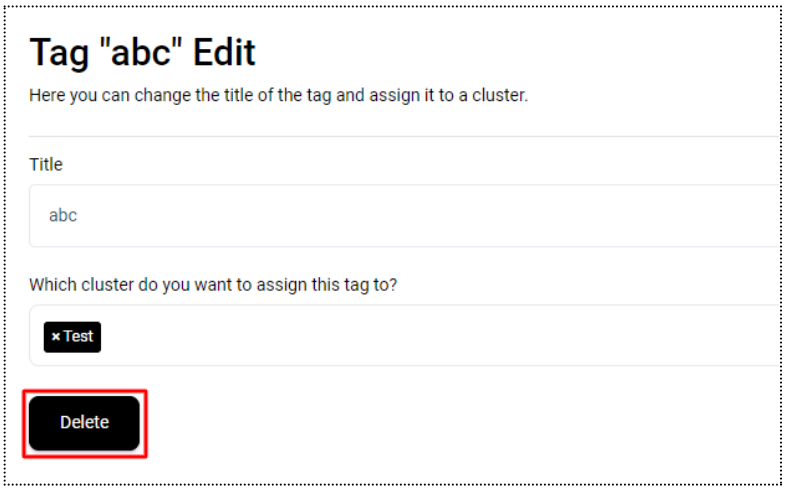
1. go to the navigation point "settings" > "Administration" and click on tags or manage your tags directly when creating a cluster in the "Tag Management".
2. click on the "Add tag" button in the upper right corner



3. give the tag a title and (if already present) assign different clusters to the tag

How to delete a tag:

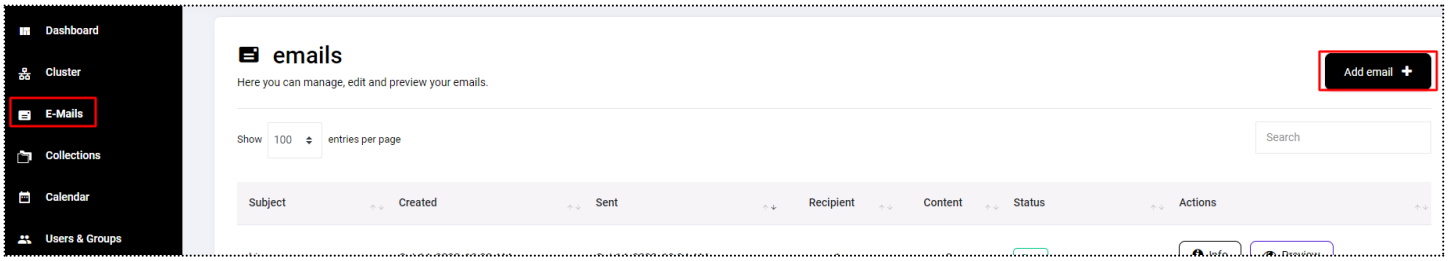
1. go to the navigation item "Settings" > "Administration" and click on Tags.
2. under Actions you will find the "Edit" button
3. at the bottom left you will find the "Delete" button



E-Mails

E-mails offer the possibility to send a message to all members of the group. However, you can also make the appropriate selection of members and groups and thus decide which members or groups should receive them.

How to add an E-Mail:

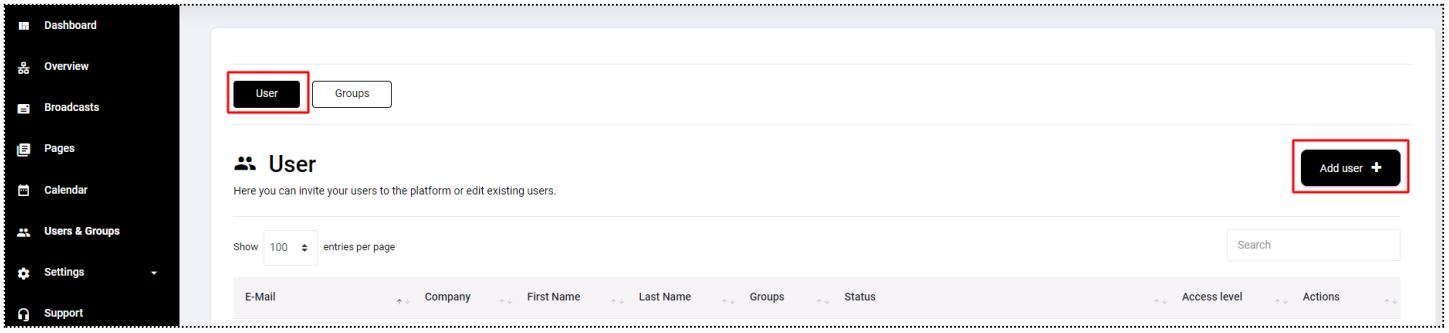


1. go to the "E-Mails" navigation item and click on the "Add email" button in the upper right corner.
2. define a subject that describes the content of the mailing
3. add a text & clusters matching the topic
4. select the desired distribution group or send the mailing to all members
5. optionally add a text below the content
6. to send the email, press the button "Continue to preview" and then "Send"

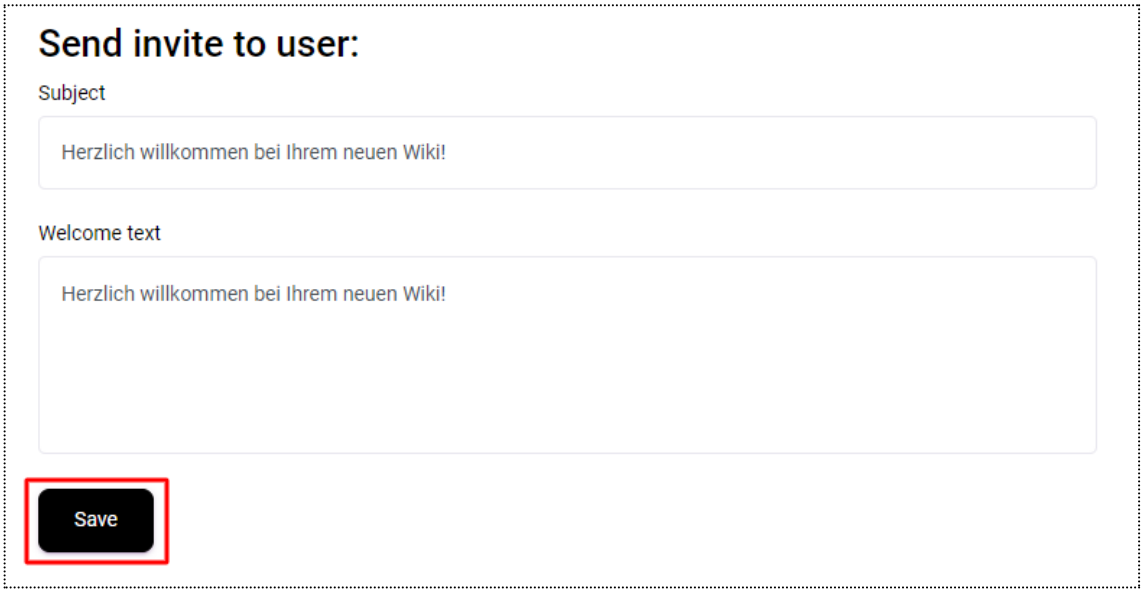
Users & Groups

Users are the people who can view or manage the site. Groups can be formed from the individual users - such as all employees from a department in your company.

How to create new users:



1. go to the navigation item "Users & Groups" and click on the button "Add User" in the upper right corner.
2. select if the user should be added manually or by file upload
3. enter all relevant data (e-mail, first name, last name, ...)
   Tip: Under Settings > Administration > User extensions you can create custom fields that will appear when creating a new user
4. select whether the new user should be a manager or a partner
   Attention: Managers have the right to manage the complete site!
5. change, if necessary, the text that appears in the email invitation
6. press save



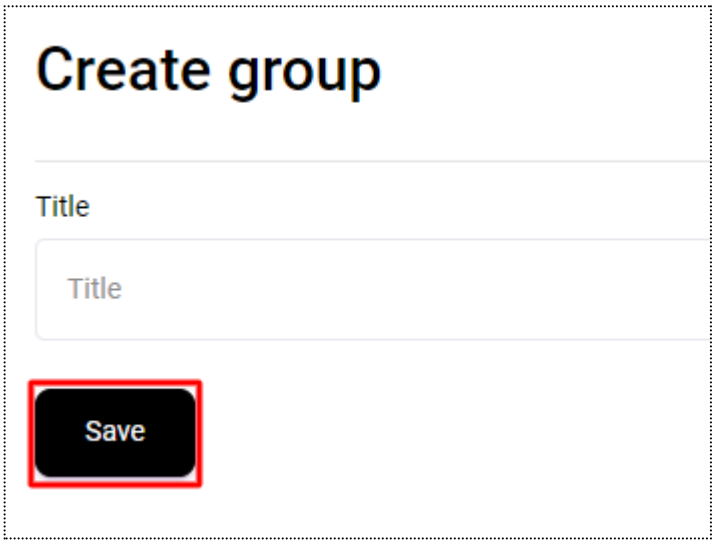
How to remove users:

1. go to the navigation item "Users & Groups”
2. select the user you want to delete and press the "Edit" button
3. at the bottom you will find the "Delete" button

Note: If you have deleted a user unintentionally, you can always add it again

How to create a group:

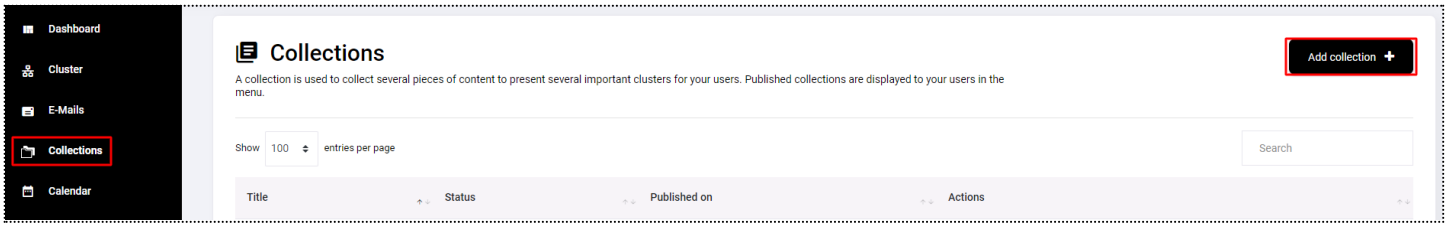
1. go to the navigation item "Users & Groups".
2. under groups you will find the button "Add group" on the right side
3. define a title for your group
4. under "Add members" select those members who should be part of this group
5. press save



Collections

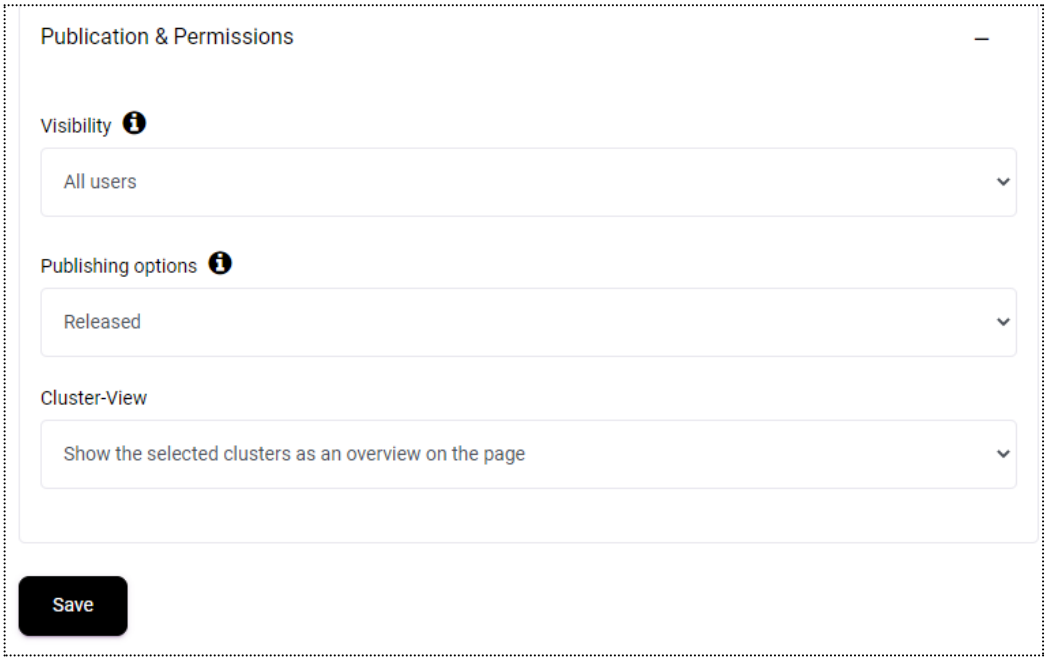
Collections are used to collect information belonging to the same subject area in a collection. Each created collection is then displayed on the left under the navigation items!

How to create a collection:



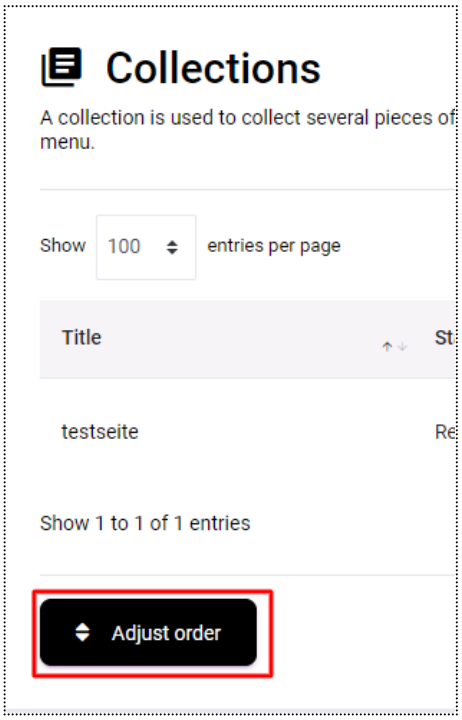
1. go to the navigation item "Collections”
2. press the "Add collection" button
3. define a page title and briefly describe the content of the collection
4. optional: add an image that matches the content of the collection
5. add all clusters that are relevant to the content
6. select who the collection should be visible to, when it should be published, and optionally change the page display under "Publishing & Permissions"

**If you select a specific group of users for visibility, the collection will ONLY be displayed to those users.*



How to change the order:

1. go to the navigation item "Collections”
2. press the "Adjust order" button in the bottom left corner



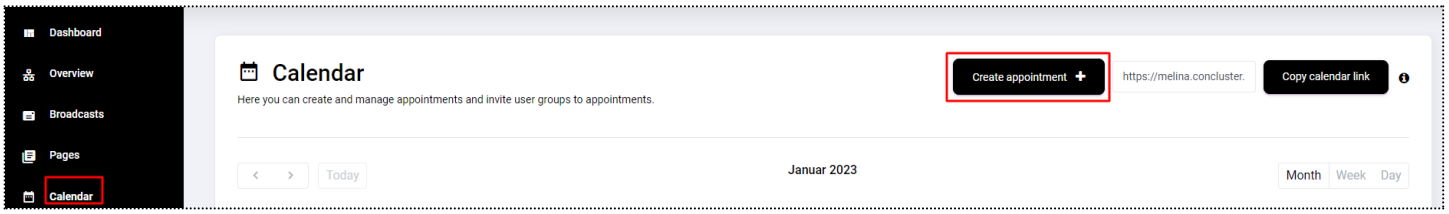
3. move the collections (Drag & Drop)

Calendar

The calendar allows you and all members to easily coordinate appointments. Create an appointment, it becomes a cluster visible to all selected members.

How to create a calendar entry:

1. go to the navigation item "calendar".
2. click on the "Create appointment" button in the upper right corner



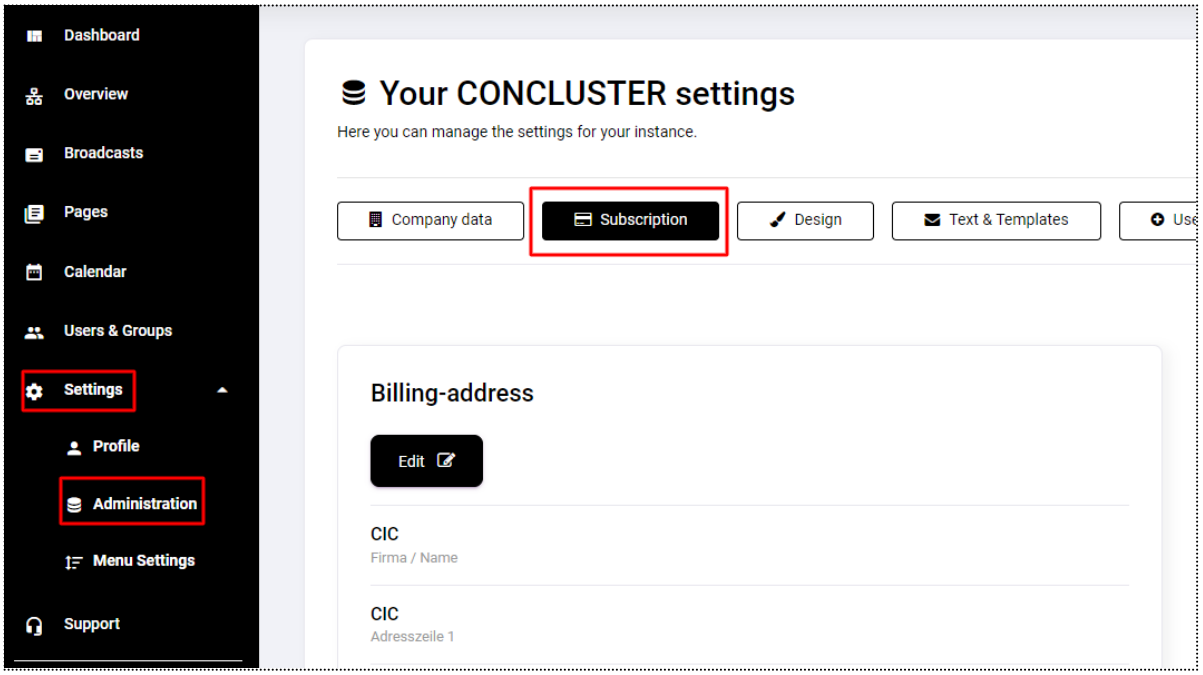
3. enter all relevant data (start date, time, place, …)
4. select for whom the calendar entry should be visible

**If you select a certain group of users for visibility, the calendar entry will ONLY be displayed to these users.*

Comments

Under each cluster there is a comment function that can be used for various purposes. For example, to release documents, for internal communication or further comments.

Subscription administration



1. go to Settings > Administration and click on "Subscription”
2. here you can see which subscription is currently valid and which ones are available
3. **Attention**: to change the subscription, you must first add a billing address and then a payment method.