

Ourlive

User Manual

June 18, 2023

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1. User Hierarchy

This platform has 3 types of users.

1.1. Employee

Typically, represents a company employee that could potentially receive email campaigns. This is the only type of user not able to log in on this platform.

1.2. Admin

Admins represent the users that are content creators. This type of user has access to all the tabs and is able to create email campaigns, automatic messages, templates, web tv contents, sending or scheduling emails and creating or managing the employees.

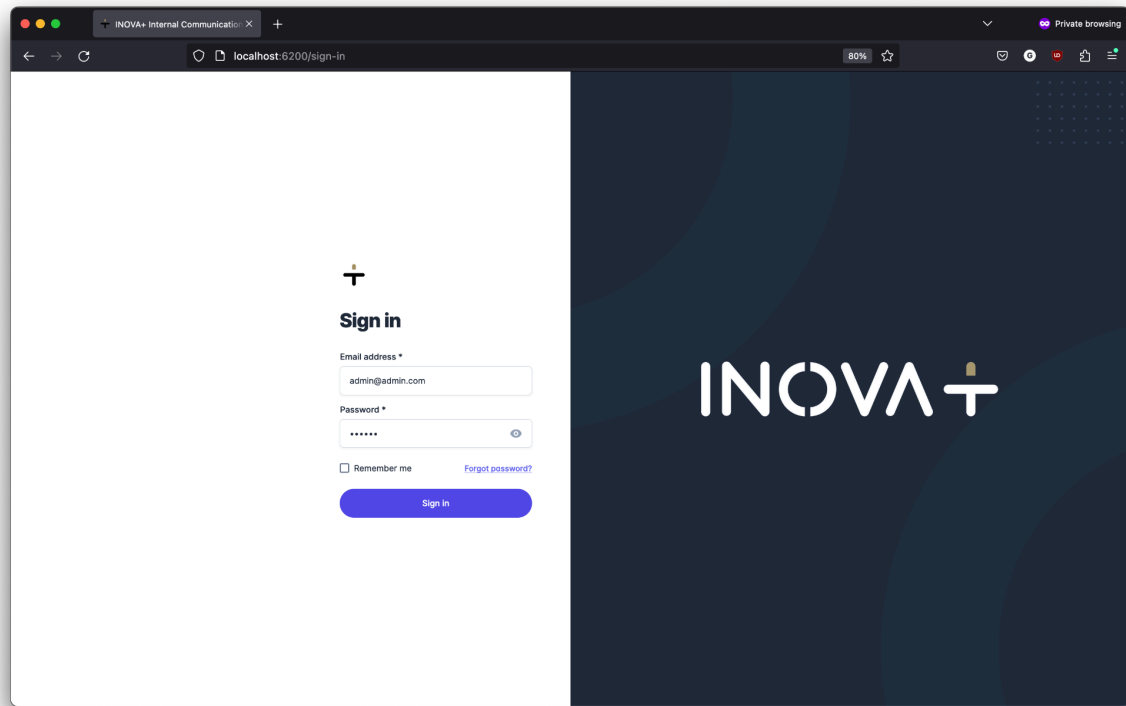
1.3. Super-Admin

Can only access the [Employees Tab](#), being able to create, edit and delete users (which by default are employees). The Super-Admin is the only type of user that can promote employees to admins, giving them access to the platform, and demote admins to employees, revoking their access.

2. Home Page

2.1. Login Area

When you are not logged in, you will find the login page.



If you input your credentials correctly, this page will redirect you to [Employees Tab](#).

Otherwise, it is going to display a message saying that the given credentials are invalid.

Sign in


Wrong email or password

Email address *

2.2. Forgot Password

If you are either an admin or a super-admin, you can reset your password by clicking on the *Forgot password?* link on the login page.

Password *


☐ Remember me [Forgot password?](#)¹

This will redirect you to a page where you can input the email associated with your account.



Forgot password?

Fill the form to reset your password

Email address *

Return to [sign in](#)

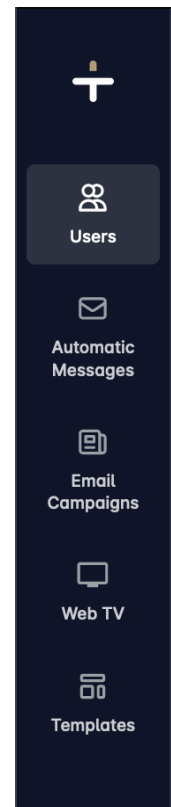
After sending the request, you should shortly receive an email with a link where you can reset your password.

Notice that you only have **10 minutes to use that link**, as it'll become invalid after that.

3. Navigation Bar

There are two navigation bars:

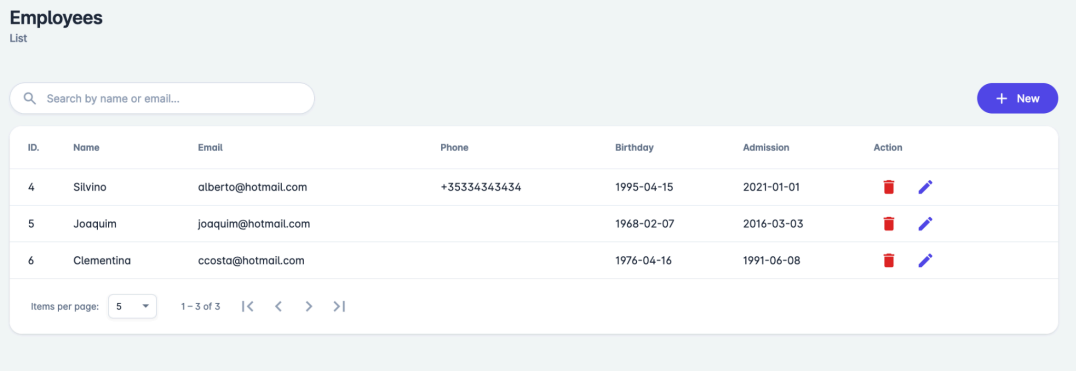
- The **vertical bar**, located at the left, where you can navigate to different pages. These are the **Employees Tab**, **Automatic Messages**, **Email Campaigns**, **Templates** and **Web TV**. For Super-Admins, only the first one will appear. This bar can be collapsed using the 3 lines button.
- The **horizontal bar**, located at the top, where you can check the name of the logged in user or **log out**.



4. Employees Tab

4.1. Create a new User

To create a new email campaign, click the “+ **New**” button on the right side of the screen, after which you should be presented with a pop-up, prompting you to fill in necessary information.

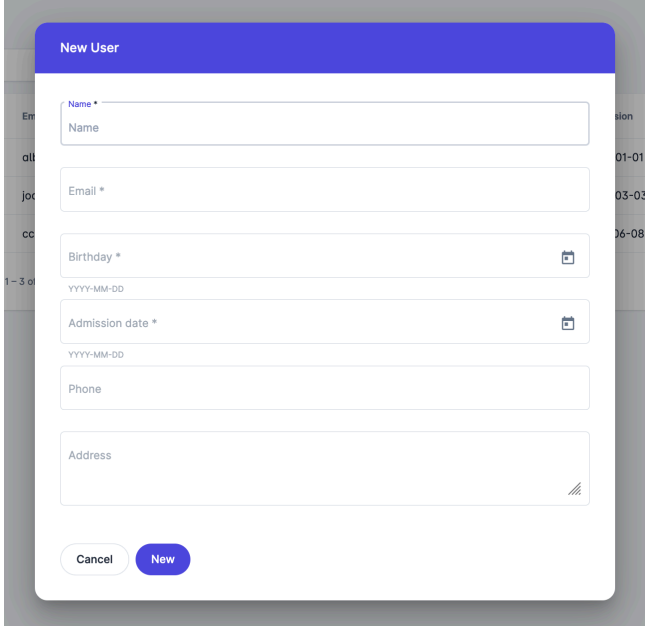


The screenshot shows the 'Employees' list interface. At the top, there's a search bar with the placeholder 'Search by name or email...' and a '+ New' button. Below is a table with columns: ID, Name, Email, Phone, Birthday, Admission, and Action. The table contains three rows of employee data. At the bottom, there's a pagination control showing 'Items per page: 5' and '1 - 3 of 3'.

ID	Name	Email	Phone	Birthday	Admission	Action
4	Silvino	alberto@hotmail.com	+35334343434	1995-04-15	2021-01-01	
5	Joaquim	joaquim@hotmail.com		1968-02-07	2016-03-03	
6	Clementina	ccosta@hotmail.com		1976-04-16	1991-06-08	

In the pop-up, you are able to fill in necessary information such as the:

- **Name** of the user
- **Email** of the user, to where the content will be potentially sent
- **Birthday** of the user
- **Admission date**, that is the date that the user joined the company
- **Phone** number of the user
- **Address** of the user



The screenshot shows a 'New User' pop-up form. It has a blue header with the title 'New User'. The form contains several input fields: 'Name *', 'Email *', 'Birthday *' (with a calendar icon), 'Admission date *' (with a calendar icon), 'Phone', and 'Address'. At the bottom, there are two buttons: 'Cancel' and 'New'.

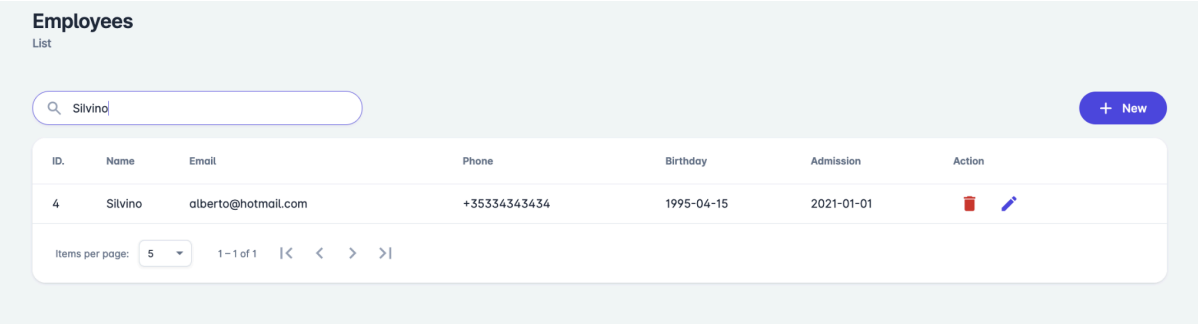
The created user will have the type *Employee* and will be added to the table.



4.2. Manage Users

After creating a user, you are able to view some information about each one, and manage a few aspects. Notice that **only super-admins are able to see admins** listed on this page.

Each entry has 6 columns:

1. **ID** - This is automatically assigned to each entry, and serves for clear identification purposes
2. **Name** - Name of the user.
3. **Email** - Email of the user.
4. **Phone** - Phone number of the user.
5. **Birthday** - Birthday date of the user.
6. **Admission** - Date that the user joined the company.
7. **Action** - This section includes two actions:
 - Delete, represented by the red bin icon, which removes the user from the database
 - Edit, represented by the purple pencil, which reveals the popup used to edit the user's details.





ID.	Name	Email	Phone	Birthday	Admission	Action
4	Silvino	alberto@hotmail.com	+35334343434	1995-04-15	2021-01-01	 

Items per page: 5 1 - 1 of 1 |< < > >|

Additionally, use the **pagination UI** to limit the amount of automatic messages you choose to display.

4.2.1. Super-Admin User Management

ID.	Name	Email	Phone	Birthday	Admission	Action
1	Jorge	user@user.com	+35123456789	1983-03-20	2021-01-01	
3	Joana	admin@admin.com	+35334343435	1995-04-15	2021-01-01	
4	Silvino	alberto@hotmail.com	+35334343434	1995-04-15	2021-01-01	
5	Joaquim	joaquim@hotmail.com		1968-02-07	2016-03-03	
6	Clementina	ccosta@hotmail.com		1976-04-16	1991-06-08	

Only super-admins can view and manage **admins**, as well as regular users.

They are also capable of:

- **Demoting admins** to employees (1), revoking the access to the platform for that admin.
- **Promoting employees** to admins (2), in which the user will receive an email to set the password to get access to the platform.

Super-admins also have a filter dropdown on the left of the *New* button to filter for the type of user (Employees, Admins, All).

4.3. Search for a User

There is a search bar that can be used to filter the users for their name or email address.

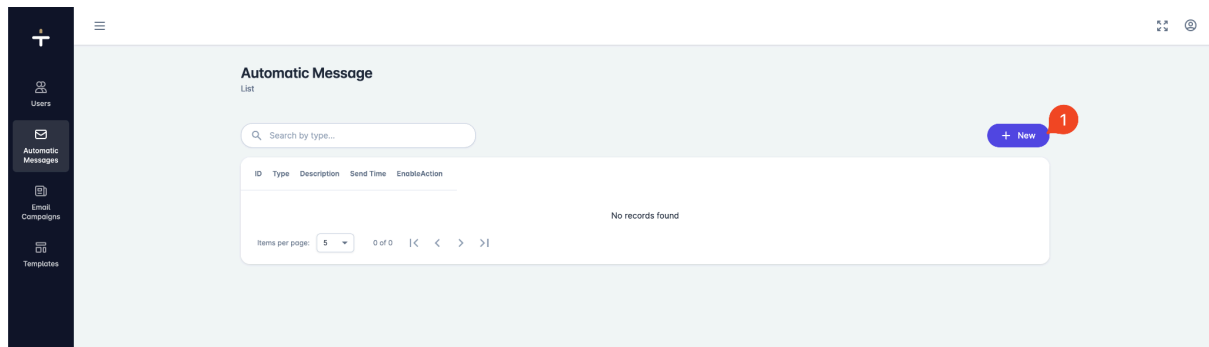
ID.	Name	Email	Phone	Birthday	Admission	Action
4	Silvino	alberto@hotmail.com	+35334343434	1995-04-15	2021-01-01	

5. Automatic Messages

An automatic message is a special type of message sent either on a users' **Birthday** or company **Admission Anniversary**.

5.1. Create an Automatic Message

To create a new automatic message, click the “+ New” button on the right side of the screen, after which you should be presented with a pop-up, prompting you to fill in necessary information.



In the pop-up, you are able to fill in necessary information such as the:

- **Type** of the automatic message (either **Birthday** or company **Admission Anniversary**)
- **Description** of the automatic message.
- The contents of the message itself. This is what the user will receive and see. In this section you can also make use of dynamic variables such as `${user}` and `${age}`.

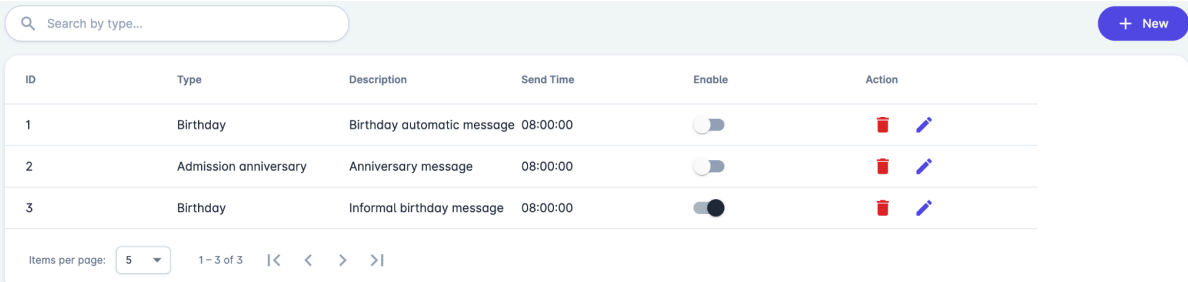
Note that each automatic message will be sent on the users' respective Birthday or company Admission Anniversary at **8:00am**, as denoted by the “Time” variable on the pop-up.







A screenshot of a 'New Automatic Message' pop-up form. The title bar is blue with the text 'New Automatic Message'. The form has two input fields at the top: 'Type' (a dropdown menu) and 'Time *' (a text field containing '08:00:00'). Below the 'Time' field is the text 'Trigger every day at this time'. The next field is 'Description *', a large text area. Below the description field is a rich text editor toolbar with buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Indent Left, Indent Right, Link, Unlink, Clear, and Source Code. Below the toolbar is a large text area with the placeholder text 'Enter text here...the variables are: \${user}, \${age}'. At the bottom of the form are two buttons: 'Cancel' and 'New'.

5.2. Manage Automatic Messages

After creating some automatic messages, you are able to view some information about each one, and manage a few aspects. Each entry has 6 columns:

1. **ID** - This is automatically assigned to each entry, and serves for clear identification purposes
2. **Type** - Either "Birthday" or "Admission Anniversary". This will ultimately decide the date at which the automatic message will be sent, each year.
3. **Description** - A short summary of the automatic message.
4. **Send Time** - The time at which the message will get sent, at the target date.
5. **Enable** - Toggle switch to manage which messages will get sent, and which are disabled. This allows for certain variation, such as a formal vs. informal message.
6. **Action** - This section includes two actions:
 - Delete, represented by the red bin icon, which removes the message from the database
 - Edit, represented by the purple pencil, which reveals the popup used to edit the automatic message's details.



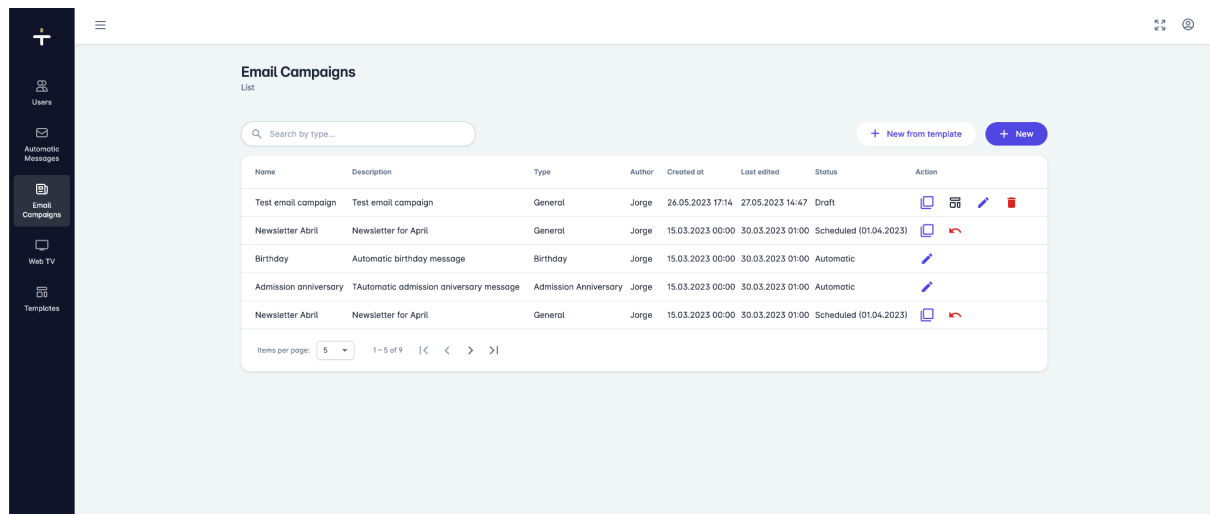
ID	Type	Description	Send Time	Enable	Action
1	Birthday	Birthday automatic message	08:00:00	<input type="checkbox"/>	 
2	Admission anniversary	Anniversary message	08:00:00	<input type="checkbox"/>	 
3	Birthday	Informal birthday message	08:00:00	<input checked="" type="checkbox"/>	 

Items per page: 5 1 - 3 of 3 |< < > >|

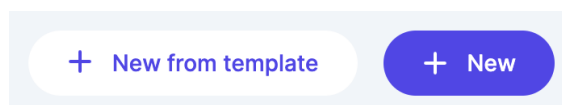
Additionally, you can also search for a specific entry, using the top left **search bar**, and use the **pagination UI** to limit the amount of automatic messages you choose to display.

6. Email Campaigns

Email campaigns allow for the creation and management of email campaigns and newsletters.



6.1. Creating a new Email Campaign



6.1.1. New Email Campaign (from scratch)

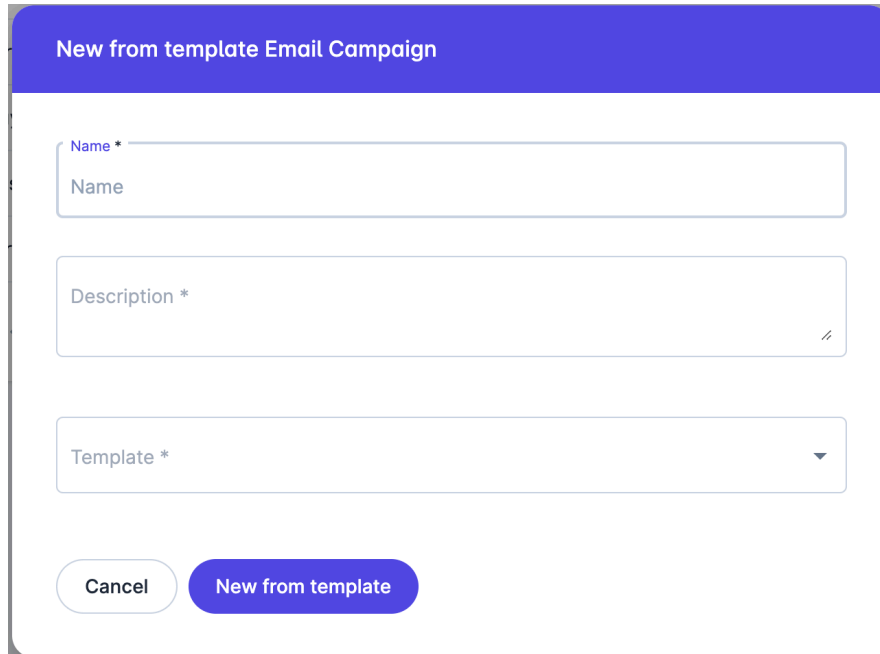
To create a new email campaign from scratch, click the “+ **New**” button on the right side of the screen, after which you should be presented with a pop-up, prompting you to fill in necessary information.

In the pop-up, you'll have to provide a **name** and **description** of the email campaign you are creating. After creating the campaign, you'll be redirected to the [Content Editor](#).

A screenshot of the 'New Email Campaign' pop-up form. It has a blue header with the title 'New Email Campaign'. Below the header are two input fields: 'Name *' and 'Description *'. The 'Name' field contains the placeholder text 'Name'. The 'Description' field is empty. At the bottom of the form are two buttons: 'Cancel' and 'New'.

6.1.2. New Email Campaign (from a Template)

Alternatively, you may choose to create a new campaign based on an already existing template, by clicking the “+ **New from template**”.



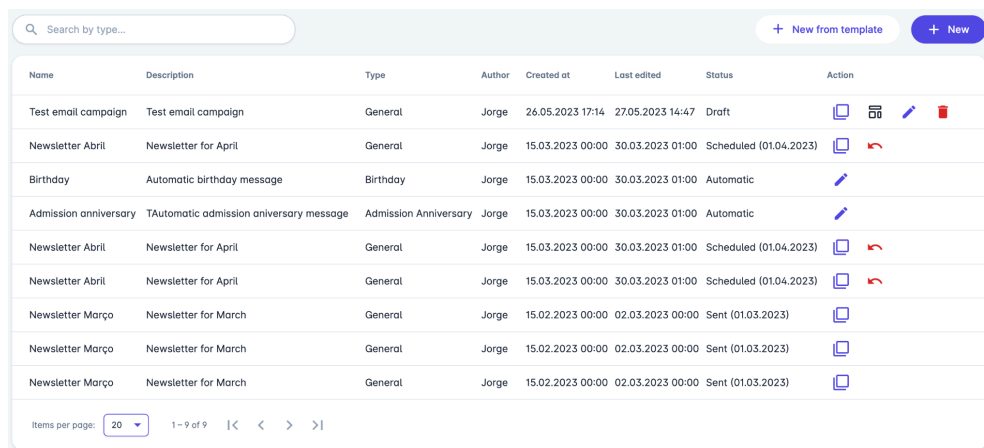
The form is titled "New from template Email Campaign" in a blue header. It contains three input fields: "Name *" (text), "Description *" (text area), and "Template *" (dropdown menu). At the bottom, there are two buttons: "Cancel" and "New from template".

The pop-up is similar to the previously mentioned popup, where you also provide a **name** and **description** of the email campaign you are creating. However here, you must also select which template your email campaign will be based on.















Learn more about templates on the [Templates](#) section of this document.






6.2 Managing Email Campaigns

After creating some email campaigns, you are able to view some information about each one, and manage a few aspects. Each entry has 8 columns:



The table displays a list of email campaigns with the following columns: Name, Description, Type, Author, Created at, Last edited, Status, and Action. The table includes several entries, such as "Test email campaign", "Newsletter Abril", "Birthday", and "Admission anniversary". The Action column contains icons for editing, deleting, and other actions. The table is paginated, showing 1-9 of 9 items.

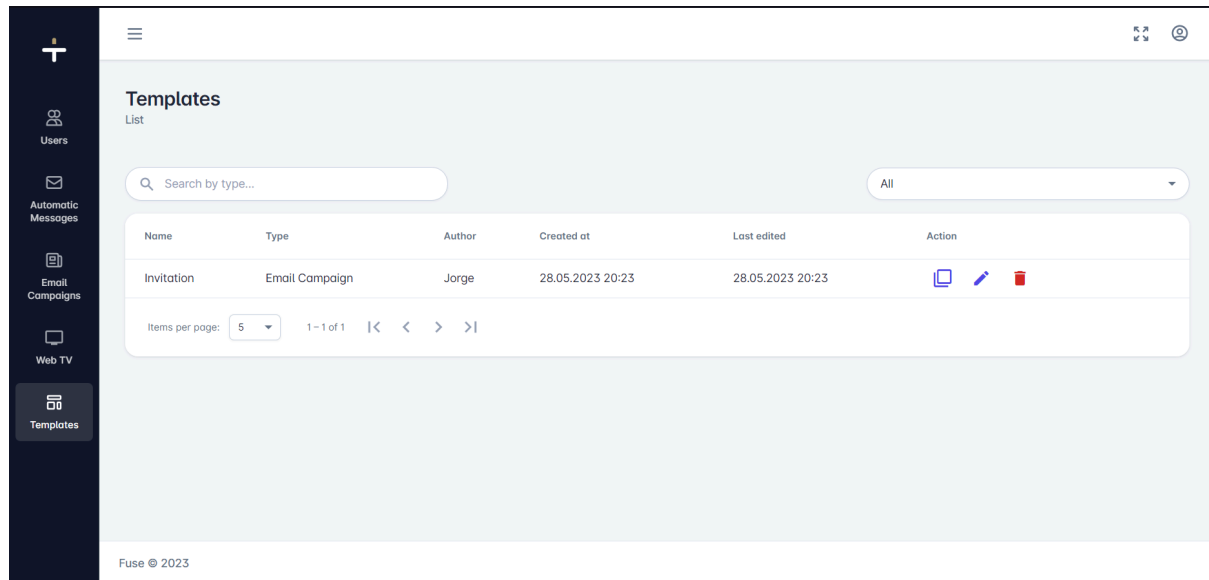
Name	Description	Type	Author	Created at	Last edited	Status	Action
Test email campaign	Test email campaign	General	Jorge	26.05.2023 17:14	27.05.2023 14:47	Draft	  
Newsletter Abril	Newsletter for April	General	Jorge	15.03.2023 00:00	30.03.2023 01:00	Scheduled (01.04.2023)	 
Birthday	Automatic birthday message	Birthday	Jorge	15.03.2023 00:00	30.03.2023 01:00	Automatic	
Admission anniversary	Automatic admission anniversary message	Admission Anniversary	Jorge	15.03.2023 00:00	30.03.2023 01:00	Automatic	
Newsletter Abril	Newsletter for April	General	Jorge	15.03.2023 00:00	30.03.2023 01:00	Scheduled (01.04.2023)	 
Newsletter Abril	Newsletter for April	General	Jorge	15.03.2023 00:00	30.03.2023 01:00	Scheduled (01.04.2023)	 
Newsletter Março	Newsletter for March	General	Jorge	15.02.2023 00:00	02.03.2023 00:00	Sent (01.03.2023)	
Newsletter Março	Newsletter for March	General	Jorge	15.02.2023 00:00	02.03.2023 00:00	Sent (01.03.2023)	
Newsletter Março	Newsletter for March	General	Jorge	15.02.2023 00:00	02.03.2023 00:00	Sent (01.03.2023)	

1. **Name** - The email campaign name
2. **Description** - A short description of the email campaign
3. **Type** - The email campaign type. All email campaigns created are assigned the "general" type attribute.
4. **Author** - The name of the author who created the email campaign. In other words, this is the name of the user who was logged in, at the time the campaign was created.
5. **Created at** - The date and time of the creation of the email campaign.
6. **Last edited** - The most recent date and time the email campaign was edited.
7. **Status** - The current status of the email campaign. A email campaign can have one of the following statuses:
 - **Draft** - An "in progress" campaign.
 - **Sent (DD.MM.YYYY)** - An email campaign which has already been sent at the specified date.
 - **Scheduled (DD.MM.YYYY)** - An email campaign which is scheduled to be sent at the specified date.
 - **Automatic** - Email campaigns which are recurring automatic messages, such as those with type "Birthday" or "Admission Anniversary". These email campaigns are created via the previously mentioned [Automatic Messages](#) tab.
8. **Action** - Actions which can be performed to manage existing email campaigns. There are a few actions available:
 -  - **Duplicate** - Creates a copy of the email campaign.
 -  - **Edit** - Edit the name and description of the email campaign.
 -  - **Delete** - Remove the email campaign from the database.
 -  - **Undo** - Cancel a scheduled send email campaign, and revert its state to a "draft" email campaign.
 -  - **Add Template** - Make the email campaign a template. This template will be added to the Template section, with the name provided by the user.

Additionally, you can also search for a specific entry, using the top left **search bar**, and use the **pagination UI** to limit the amount of email campaigns you choose to display.




7. Templates

Templates allow for the creation and management of templates which can be used not only in the Email Campaign and Web TV Content sections, but also in the editor with the Single and Group Sections.



At the Templates section you can see all templates, filter by type or search by name. You are also able to view some information about each one, and manage a few aspects. Each entry has 6 columns:

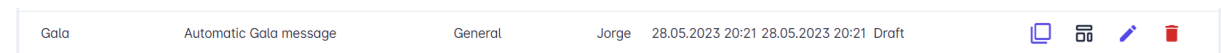
1. **Name** - The template name
2. **Type** - The template type. The type of the template is the same as what the user is creating when creating the template having the following possibilities : Email campaign, Web TV Content, Single Section, Group Section.
3. **Author** - The name of the author who created the template. In other words, this is the name of the user who was logged in, at the time the template was created.
4. **Created at** - The date and time of the creation of the template.
5. **Last edited** - The most recent date and time the template was edited.
6. **Action** - Actions which can be performed to manage existing templates. There are a few actions available:

-  - **Duplicate** - Creates a copy of the template.
-  - **Edit** - Edit the name of the template.
-  - **Delete** - Remove the template from the database.

7.1 Creating a new Template

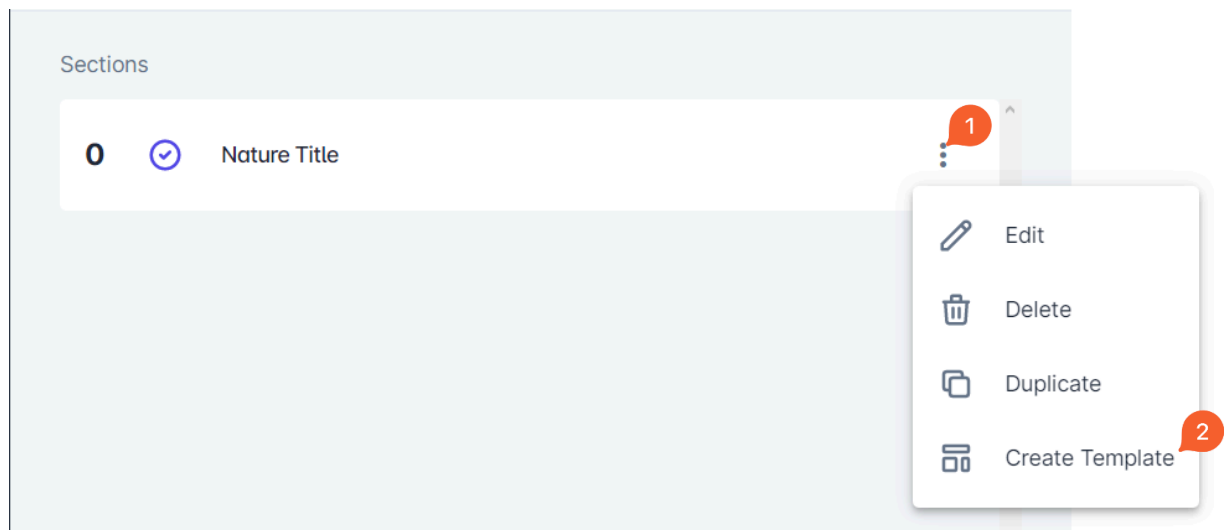
Templates can be created in several ways. Each way creates a template type, which can be Email Campaign, Web TV Content, Single Section and Group Section.

7.1.1. Creating a new Email Campaign/Web TV Content Template



To create a new email campaign or Web TV Content template, you need to go to the respective section and click on the  button. Web TV contents or email campaigns without this button cannot be used to create a template.


7.1.1. Creating a new Group Section/Single Section Template

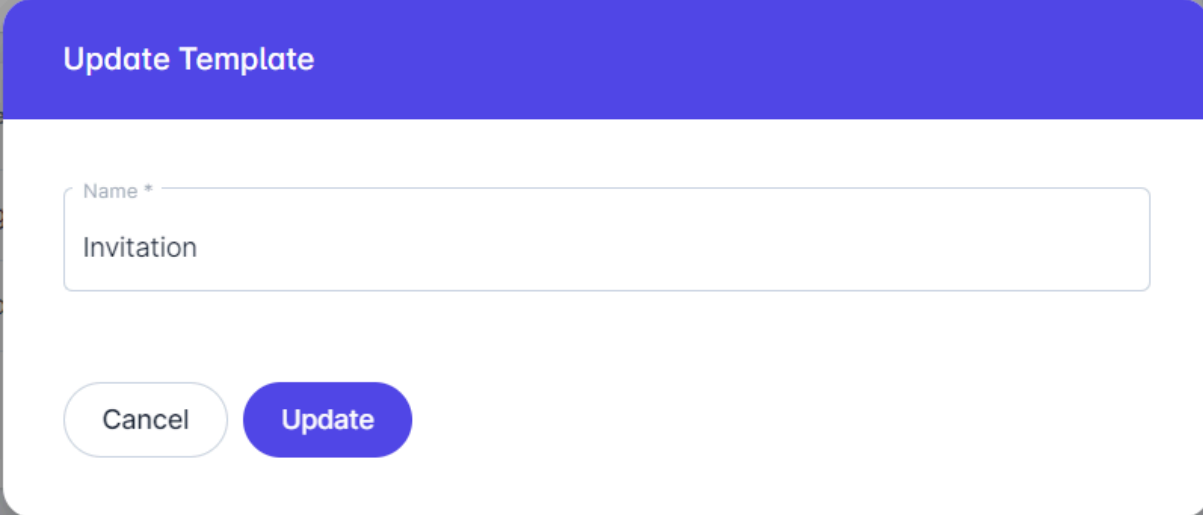


To create a new Group Section or Single Section template, you need to go to the editor and click on the (1) button and then on the (2) **"Create template"** button.

After pressing on any of the **"Create template"** buttons, a pop-up will open where you can define the new template's name. Then you just need to click on the **"New template"** button.

7.1 Editing Template

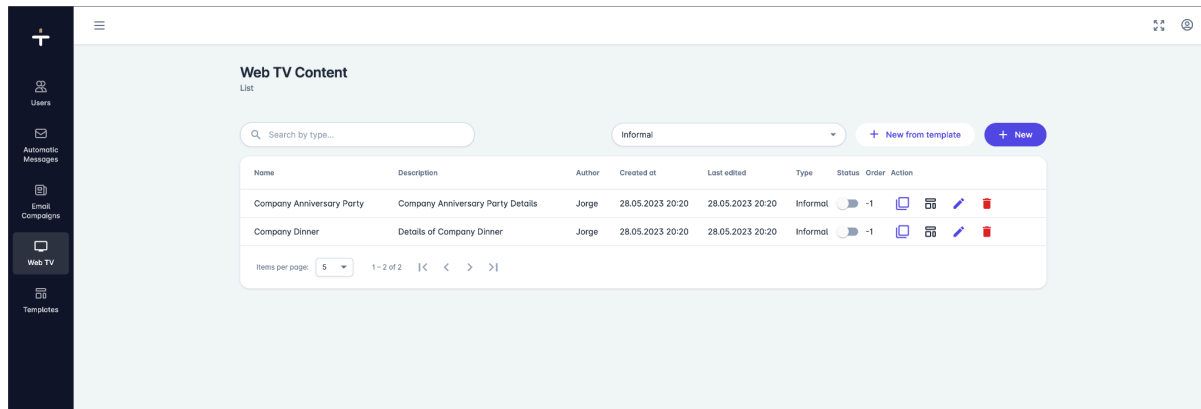
To edit a template, you need to go to the templates section and press on the  **"Edit"** button.

A screenshot of a 'Update Template' dialog box. The dialog has a blue header bar with the text 'Update Template'. Below the header is a text input field with a light blue border. Above the input field, the text 'Name *' is displayed. The input field contains the word 'Invitation'. At the bottom of the dialog, there are two buttons: a white button with a blue border labeled 'Cancel' and a solid blue button labeled 'Update'.

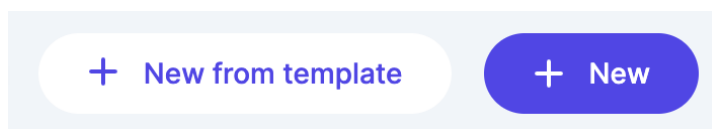
This will open a pop-up that will allow you to update the template name. After changing the name to your liking, press the **"Update"** button to save.

8. WebTV

The WebTV section allows users to create content for physical TVs, usually set up in common areas of a premises. Content created in this section is publicly viewable, and information regarding this can be found in the [Interfaces](#) section of this document.



8.1 Creating a new WebTV Content



8.1.1. New WebTV Content (from scratch)

To create a new WebTV content from scratch, click the **" + New "** button on the right side of the screen, after which you should be presented with a pop-up, prompting you to fill in necessary information.

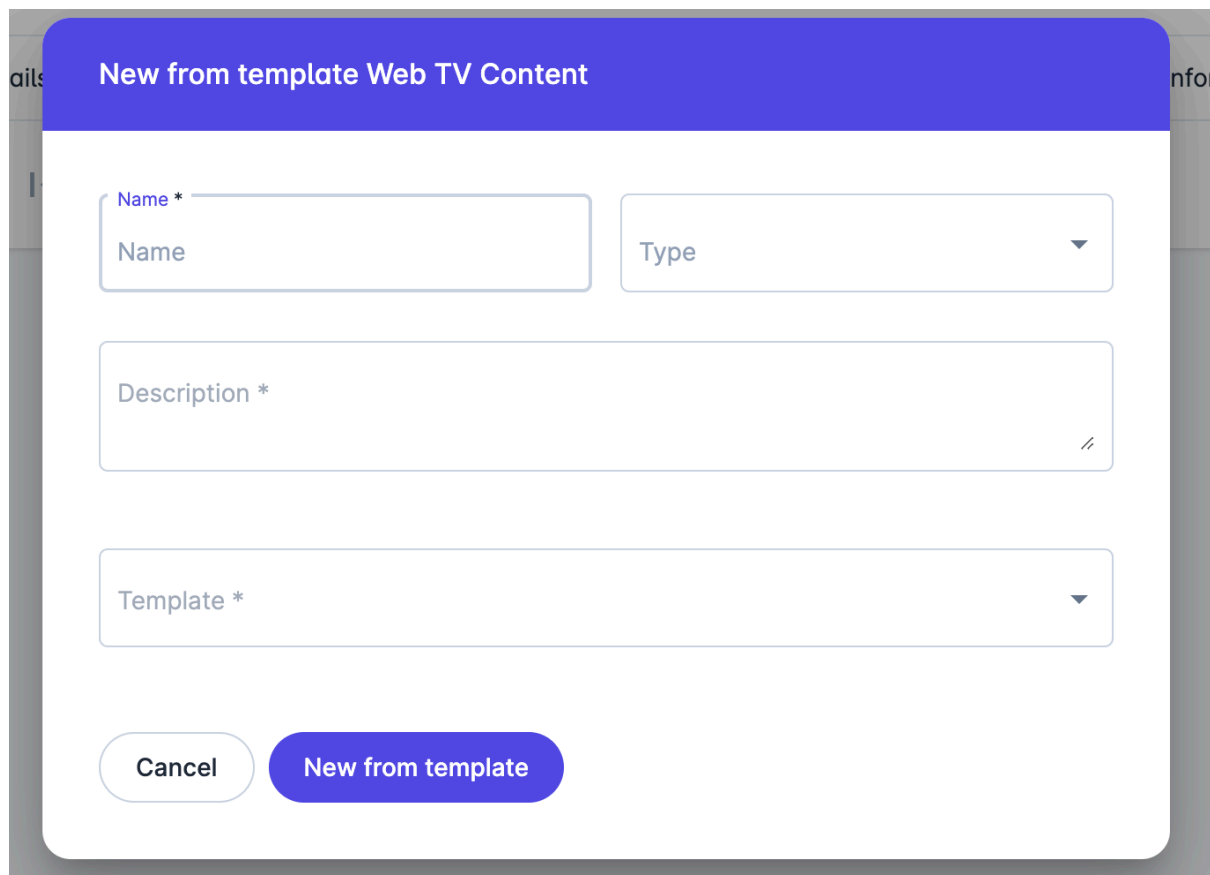
In the pop-up, you'll have to provide a **name**, a **type** (formal or informal), and a **description** of the email campaign you are creating. Learn more about how the **type** will be relevant in the [Interfaces](#) section of this document.

After creating the campaign, you'll be redirected to the [Content Editor](#).

A screenshot of the 'New Web TV Content' form. It has a blue header bar with the title 'New Web TV Content'. Below the header, there are three input fields: 'Name *' (a text box), 'Type' (a dropdown menu), and 'Description *' (a larger text area). At the bottom of the form are two buttons: 'Cancel' and 'New'.

8.1.2. New WebTV Content (from a template)

Alternatively, you may choose to create a new WebTV content based on an already existing template, by clicking the “+ **New from template**”.

A screenshot of a web application modal titled "New from template Web TV Content". The modal has a blue header bar with the title in white. Below the header, there are four input fields: "Name *" (a text box), "Type" (a dropdown menu), "Description *" (a larger text area with a small icon in the bottom right), and "Template *" (a dropdown menu). At the bottom of the modal, there are two buttons: a light blue "Cancel" button and a dark blue "New from template" button.

The pop-up is similar to the previously mentioned popup, where you also provide a **name**, **type**, and **description** of the WebTV content you are creating. However here, you must also select which template your email campaign will be based on. Learn more about templates on the [Templates](#) section of this document.

Note: you can create an **informal** WebTV content from a **formal** WebTV template, and vice-versa.

8.2 Managing WebTV Contents

After creating some WebTV contents, you are able to view some information about each one, and manage a few aspects.

In order to organize each type of WebTV content, make sure to select the "Type" of the content you wish to view on the top bar, to either "Formal" or "Informal".

Web TV Content
List

Search by type... Informal + New from template + New

Name	Description	Author	Created at	Last edited	Type	Status	Order	Action
Company Dinner	Details of Company Dinner	Jorge	28.05.2023 20:20	28.05.2023 21:04	Informal	<input checked="" type="checkbox"/>	0	
Summer Holidays	Summer Holidays Celebration	Jorge	28.05.2023 21:04	28.05.2023 21:04	Informal	<input checked="" type="checkbox"/>	1	
Company Anniversary Party	Company Anniversary Party Details	Jorge	28.05.2023 20:20	28.05.2023 21:05	Informal	<input checked="" type="checkbox"/>	2	
After Hours Party	Small business party	Jorge	28.05.2023 21:05	28.05.2023 21:05	Informal	<input type="checkbox"/>	-1	

Items per page: 5 1 - 4 of 4 < > >|

After creating some WebTV contents, you are able to view some information about each one, and manage a few aspects. Each entry has 8 columns:

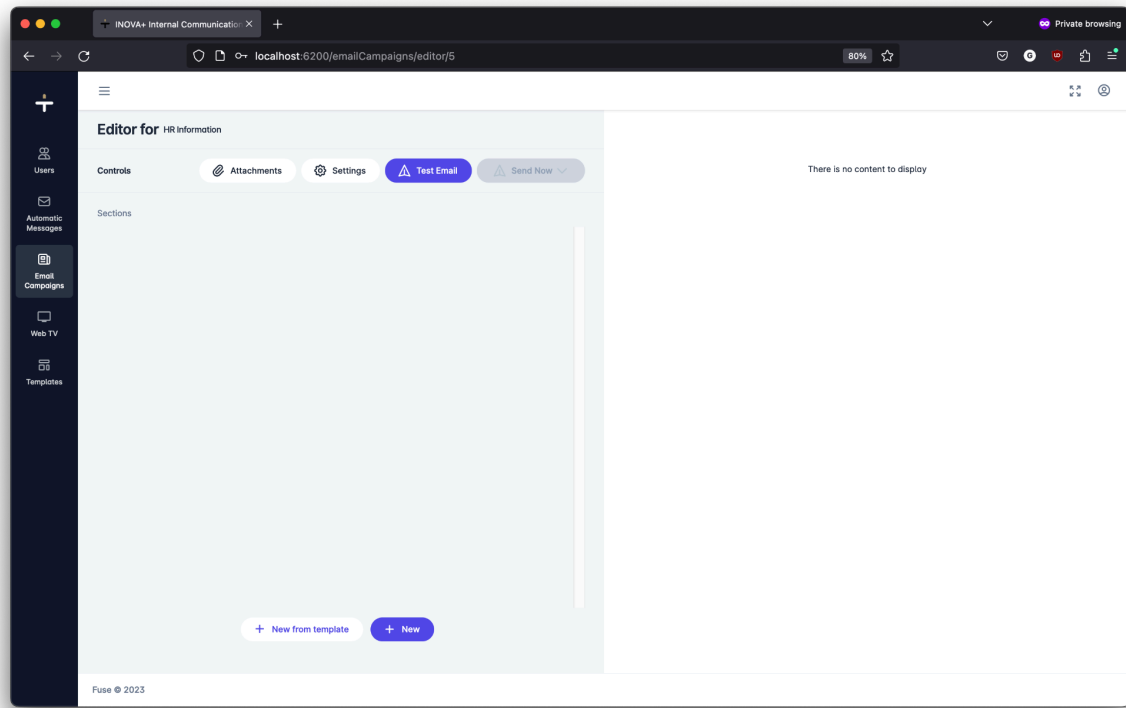
1. **Name** - The WebTV content name
2. **Description** - A short description of the WebTV content
3. **Author** - The name of the author who created the WebTV. In other words, this is the name of the user who was logged in, at the time the campaign was created.
4. **Created at** - The date and time of the creation of the WebTV.
5. **Last edited** - The most recent date and time the WebTV was edited.
6. **Type** - The WebTV content's type. The type can either be "Formal" or "Informal".
7. **Status** - The enabled / disabled status of the WebTV, represented by a toggle switch. This will determine whether this content will display in the WebTV interface. Learn more about interfaces in the [Interfaces](#) section of this document.
8. **Order** - The order in which the WebTV content will be displayed in the WebTV interface. Disabled WebTV contents will display a "-1" order number. On the right side of the order number, you can change the order of each WebTV content.
9. **Action** - Actions which can be performed to manage existing WebTVs. There are a few actions available:

- **Duplicate** - Creates a copy of the WebTV.
- **Edit** - Edit the name and description of the WebTV.
- **Delete** - Remove the WebTV from the database.
- **Add Template** - Make the WebTV a template. This template will be added to the Template section, with the name provided by the user.

Additionally, you can also search for a specific entry, using the top left **search bar**, and use the **pagination UI** to limit the amount of WebTVs you choose to display.

9. Content Editor

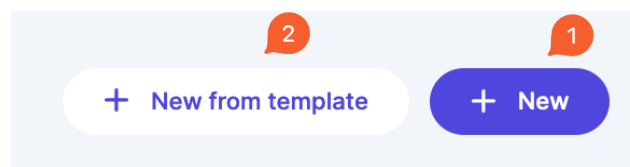
9.1. Introduction



In the editor, content can be created by composing different **sections**. These sections can either be **single** or **group**.

The output can be previewed on the right half of the window

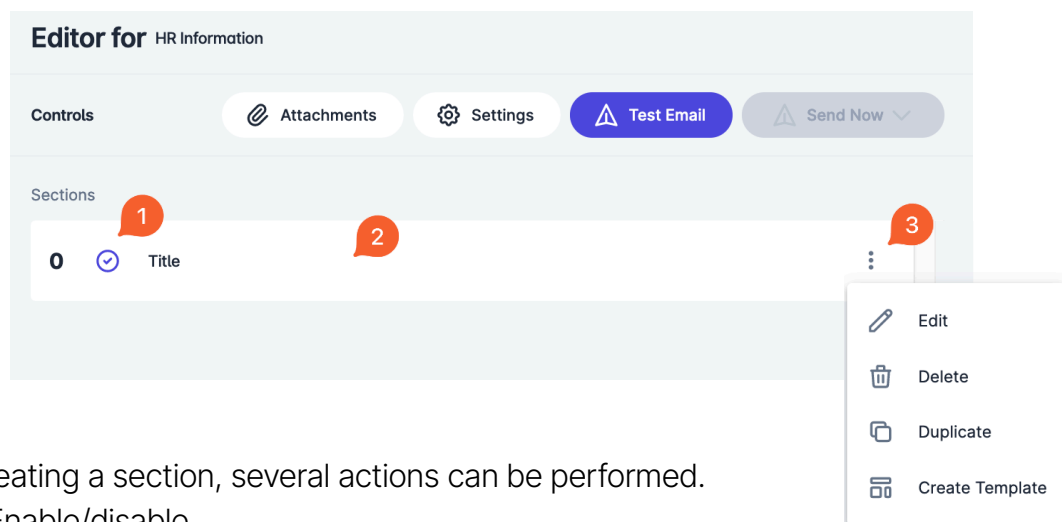
9.2. Create a Section



1. Create from scratch (1) or from a template (2)

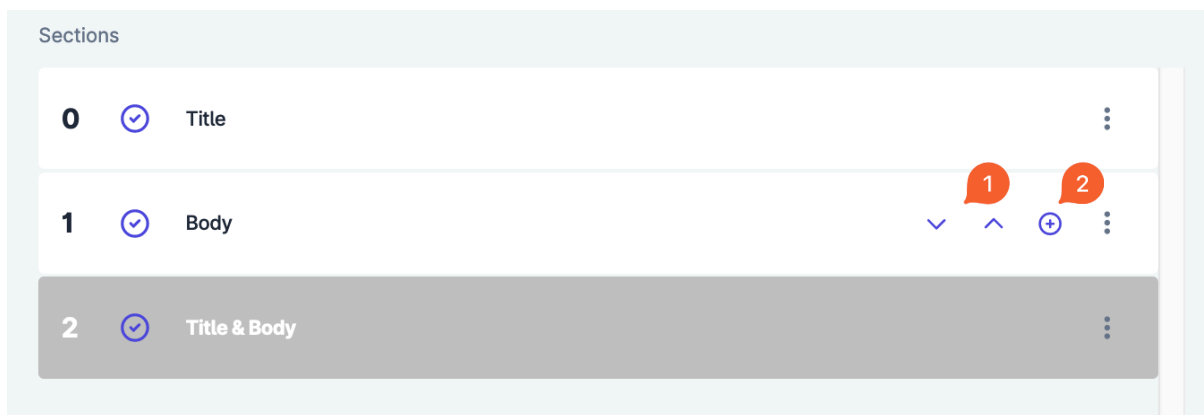
2. Set the section title and choose if it is a [group section](#) (single sections are the default)

9.3. Section Actions



After creating a section, several actions can be performed.

1. Enable/disable
2. [Edit the section contents](#)
3. More Actions:
 - a. Edit its name
 - b. Delete
 - c. Duplicate
 - d. Create a template

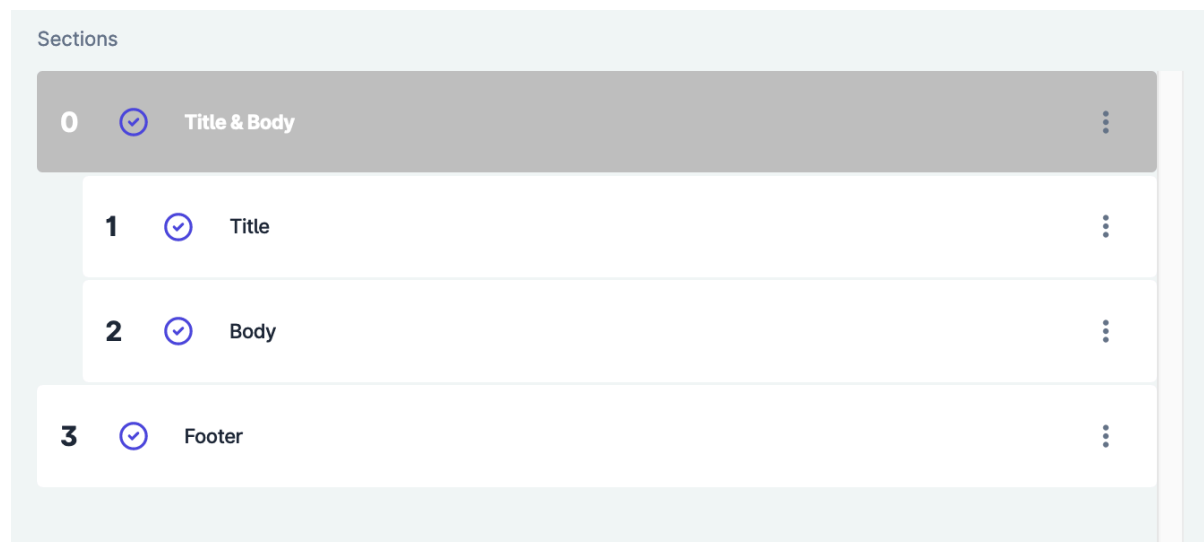


While hovering a section, more options will appear:

1. Move the section
2. Add it to a [group section](#)

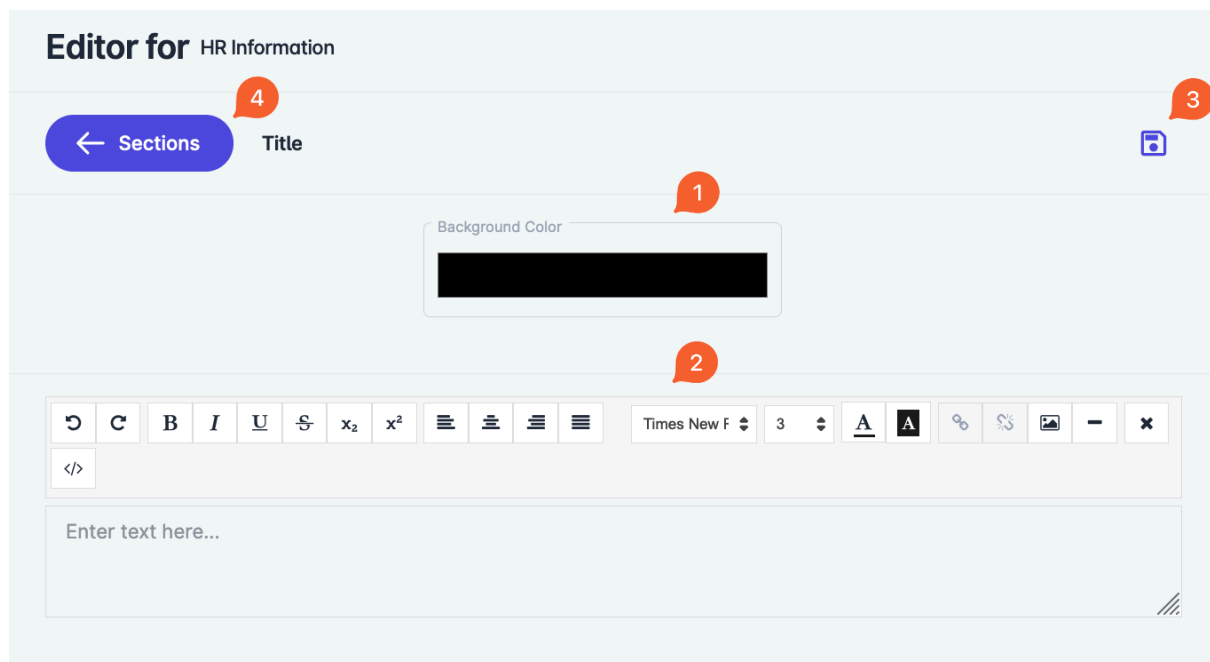
9.4. Email Campaign Editor

9.4.1. Single vs Group Section



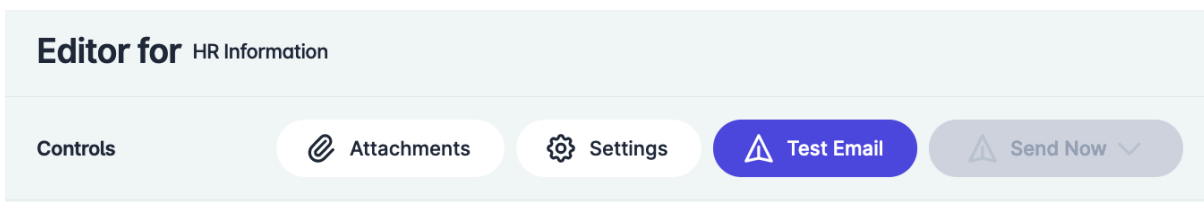
Group sections are visually told apart from single sections because of their darker background. Group sections allow grouping of single sections. In the [Web TV editor](#), they also allow slide-showing between their children sections.

9.4.2. Section Editor



1. Set a background colour (the default is **no** background)
2. Write and format text (unavailable in group sections)
3. Save changes
4. Go back to the editor main page

9.4.3. Controls panel



The Controls bar allows:

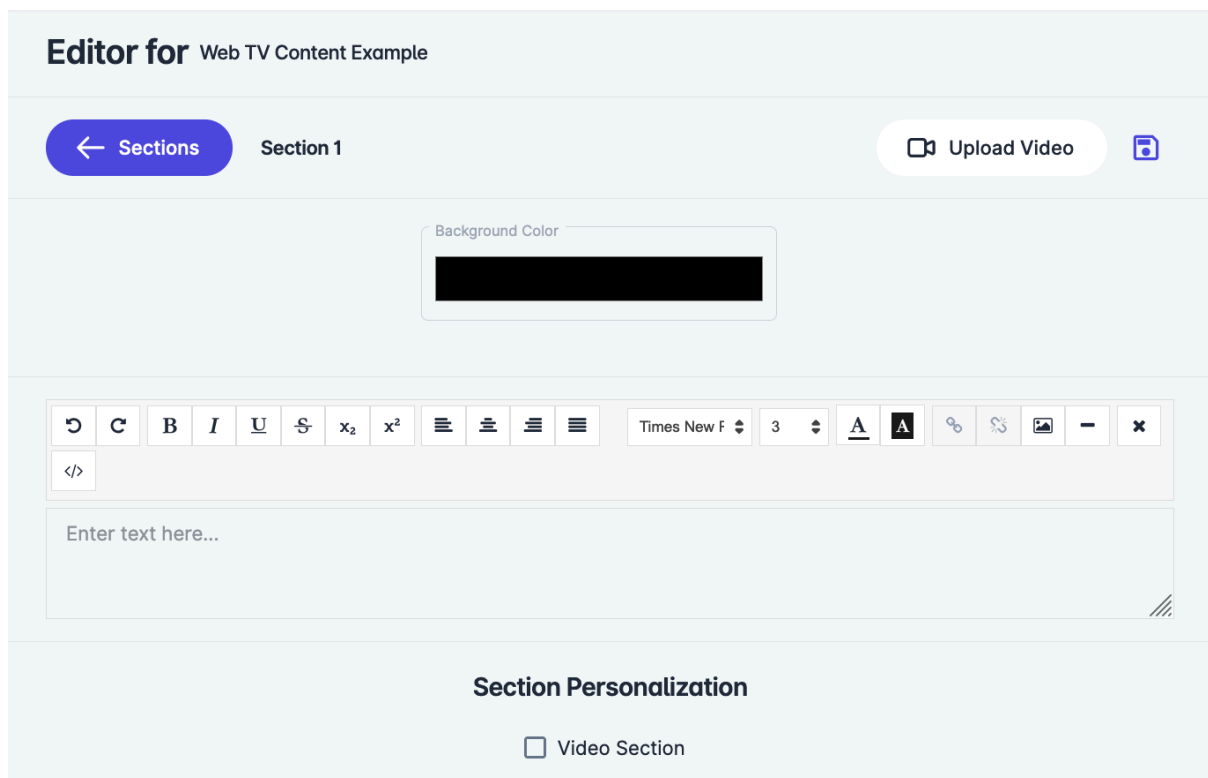
1. Uploading attachments
2. Changing the email settings (sender and recipient information, subject as well as SMTP server name and port)
3. Sending a test email
4. Send immediately or schedule send

9.5. Web TV Editor

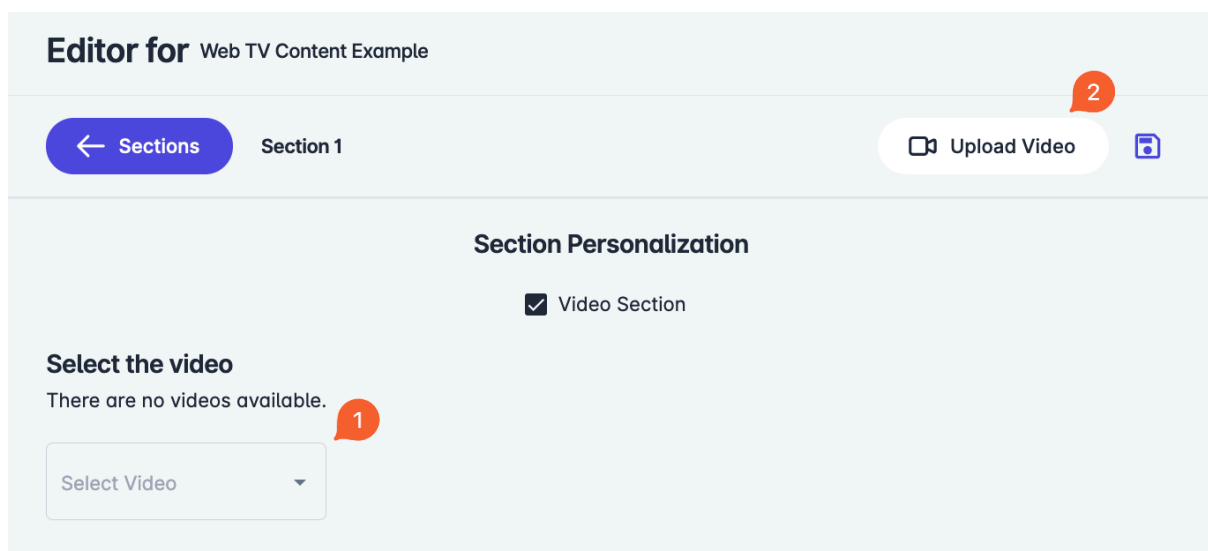
The Web TV editor shares many features with the [Email Campaign editor](#).

This section mentions only the distinctions which include: video section, slideshow section and the Controls panel

9.5.1. Video Section



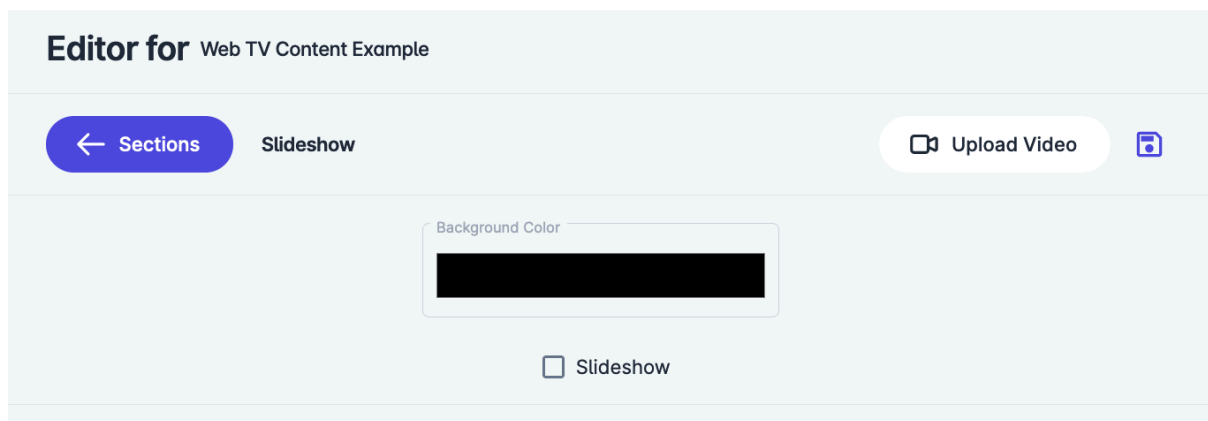
In the Web TV editor, single sections can be turned into video sections.



Video sections can play previously uploaded videos.

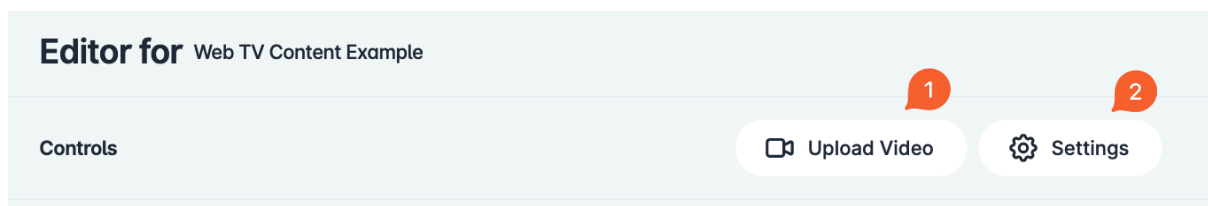
1. Select a video to play
2. Upload a video

9.5.2. Slideshow Section



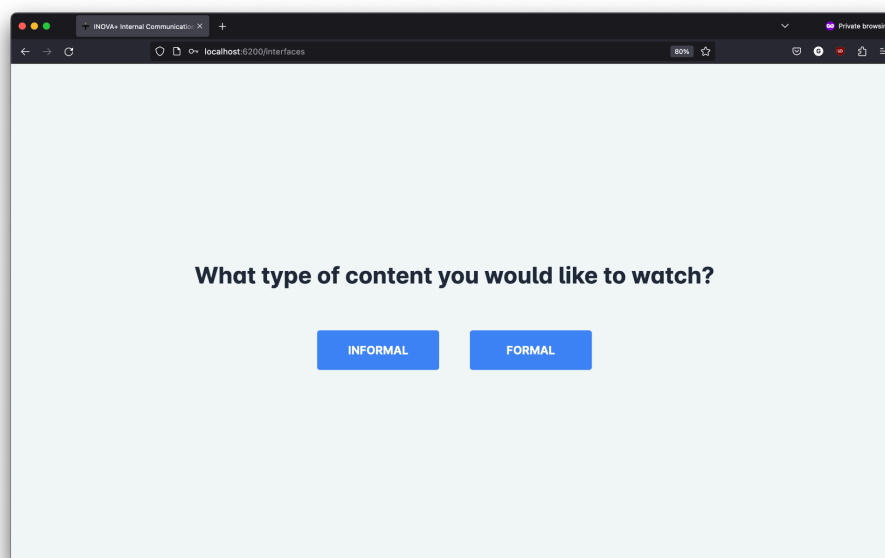
In the Web TV editor, group sections have an additional option *Slideshow*, which enables the slide-showing of children sections.

9.5.3. Controls panel



1. Upload a video that can be used in a [video section](#)
2. Set the content duration

10. Interfaces



By accessing the */interfaces* path, active content can be viewed.