



# **CIRCABC** User guide





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# Welcome to the CIRCABC user guide!

This guide aims to help you in your daily use of CIRCABC. It intends for both **first-time and advanced users**.

If intending to manage your own CIRCABC private workspace and user community, you will also consult the "Interest Group Leader Guide".



### **Newcomers**

#### Welcome to CIRCABC!

### You said CIRCABC, didn't you?

**CIRCABC** ("Communication and Information Resource Centre for Administrations, Businesses and Citizens") is used to create collaborative workspaces where communities of users can work together over the web and share information and resources.

With CIRCABC you distribute and manage documents and files in any format, many languages and with version control

### So you can

- ✓ Deal with translations through version-controlled multilingual editions
- ✓ Search in multilingual documents
- ✓ Start discussion forums
- ✓ Manage documents and users through interactive forms

Furthermore, the members of a collaborative group can see only what they are allowed to. Depending on their user rights, they can also

- ✓ manage their individual workspace in a decentralised manner
- ✓ launch audit trail facilities
- ✓ create or answer surveys through the integration of CIRCABC with IPM (Interactive Policy-Making at http://ec.europa.eu/yourvoice/ipm/)

CIRCABC has been developed under programme <u>IDABC</u><sup>1</sup>. It is based on <u>Open Source Software</u><sup>2</sup>. It is distributed free-of-charge under the <u>EUPL V. 1</u><sup>3</sup> (European Union Public Licence).

# Whom is CIRCABC intended for?

CIRCABC is available free-of-charge for

- ✓ Public Administrations
- ✓ Businesses
- ✓ Citizens

<sup>&</sup>lt;sup>1</sup> The IDABC programme is presented at <a href="http://ec.europa.eu/idabc/">http://ec.europa.eu/idabc/</a>

<sup>&</sup>lt;sup>2</sup> Further information on OSS is available at <a href="http://www.osor.eu/">http://www.osor.eu/</a>

<sup>&</sup>lt;sup>3</sup> The EUPL V.1 is explained at http://www.osor.eu/eupl



### Can you speak CIRCABC?

CIRCABC calls an **Interest Group** (IG) the *private workspace* designed for and shared by a *community* of users.

Several Interest Groups and related information are grouped together in **categories**.

Some Interest Groups may be entirely or partly public (no authentication required). Others have their access reserved for their members.

An Interest Group is characterised by:

- ✓ A group of users (potentially unlimited)
- ✓ A set of services
- ✓ A collection of contents brought together under a main topic.

### A group of users

The user responsible for managing the Interest Group is known as the **leader**. Other users may be granted more or less rights depending on the **user access profile** the leader has assigned to them.

#### A set of services

**Library**: the library can be seen as a tree of folders (so-called 'spaces') filled with content. This is the place where the documents are stored, managed and shared. These can be viewed, downloaded, modified, versioned, sent by e-mail, etc. They can be grouped together with their translations into multilingual editions.

**Members**: this service provides information about your interest group fellow-members. It allows you to search, also, users who may apply for membership in your interest group. The members of an interest group can ask for their contact information to be hidden from or shown to other people.

**Newsgroups**: this is the place where you create forums and manage discussions. Note that you can have talks about individual documents, outside this service. The "start/view discussion" action, indeed, is attached to the documents uploaded in the Library.

**Events**: in a first time, this has to be considered as a mere calendar.

**Information**: this set of actions will be for customising the interest group presentation. **Surveys**: optionally, members can build and follow surveys through the integration of CIRCABC with IPM (Interactive Policy-Making).

#### A collection of contents

The documents you are working on are known by CIRCABC as "**contents**". The contents are grouped into **spaces** and/or **sub-spaces**.



# Accessing CIRCABC

### Requirement

CIRCABC is a web-based application, so you need an **internet connection** and a **browser** (Internet Explorer, Mozilla Firefox...).

You must use a **unique e-mail address** (several members of an association, for instance, cannot share their organisation's global email as registering in the CIRCABC OSS version).

## About the access systems

#### **About ECAS**

The registered users, external as well as European institutions' staff, log in CIRCABC through the European Commission's Authentication Service (ECAS). You need an ECAS username and password.

If you do not have any, you will register in ECAS (see page 7).

Otherwise, you follow the <u>link "Login"</u> (see page 10) Then, you select your user domain ("external", "European Commission", "European Court of Justice"...). Lastly, you enter your ECAS username and password. You are directed to CIRCABC.

### Is the access to CIRCABC public?

You get in CIRCABC...

Via public access:

You have logged in CIRCABC as a **guest**. No username neither password is required. But it should be noted that:

- ✓ you can only access the Interest Groups which have been granted public accessibility.
- ✓ you can only read and download documents.

If wishing to collaborate more closely in an Interest Group, you are warmly advised to apply for membership after registration in ECAS.

#### Via login:

The registered users have an opportunity to go further into CIRCABC since they may ask for membership of an Interest Group. Before joining any Interest Group, however, you may be granted very limited access rights by the Interest Group Leader.

It is for the interest group leaders to determine whether access to their group will be public or reserved for membership. They can choose between three alternatives:

- ✓ public access: anybody, whether or not registered, can get in the interest group
- ✓ registered access: those only who have a username and password can enter the interest group
- ✓ member access: those only who have got membership of the interest group can access.

# Getting an account

Sign up via ECAS

✓ you select **Login** in the CIRCABC main menu





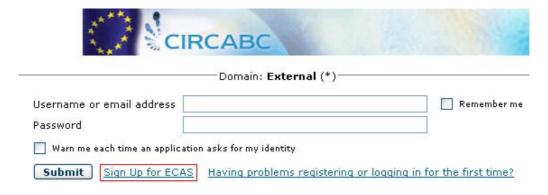
The ECAS login page is displayed showing by default the domain "European Commission".

✓ you change domain. You will find the link "use a different domain" in the bottom part of the page:



Having followed this link, you pick "**External**" out of the domain list and press on "Select". You are taken back to the ECAS login page.

✓ Now this shows the link "**Sign up for ECAS**".





✓ Having followed this link, you reach the **ECAS registration form**.

	Registration form	
	Fields marked with a * are r	mandatory
Username:	Chama911	
First name:	Victor-Hugo	*
Last name:	Romanesco	*
email:	cham911.trash@gmail.com	*
Security check:	Sapt Constitution of the C	
	Please, type in the characters appearing in the image  *	
		Create

Fill in the form according to the directions at screen and **submit**. All goes right? The message below comes up at screen:

ECAS password initialisation success Your ECAS password was successfully initialised!

✓ Some whiles later, you receive an **e-mail with an activation link**.

Dear Victor-Hugo ROMANESCO,

Your account has been created by the European Commission Authentication Service. Your user name is **Chama911**. Please follow this link to initialize your password.

If the above mentionned link does not work, you can copy-paste the following address (without any line break) in your browser address bar:

https://ecas.cc.cec.eu.int:7002/ecas/init/initialisePasswordLogin.do?wayf.domain=external&wayf. remember=checked&wayf.submit=Select&uid=nromanvi&resetCode=

fd54731628eb96703ee15caa04f72018a001d56a5d84658196a0dc9fe1bc

b3b1f89d3a6e179a9fc51bd690d7560e51701db9&service=https://circabc.europa.eu/faces/jsp/ extension/wai/ecas/ecaslogin.jsp

Sent to you by

European Commission Authentication Service



✓ Through this link, you go to a page where you can **set your initial ECAS password**.

Note: Please take great care in entering your new password. Once you have created it, you will only be able to change or reset it yourself after 1 day(s).

Domain External
Username Chama911

New ECAS password

Confirm new ECAS password

Submit

A unique username and password allow you to apply for membership in several Interest Groups.

#### Logging in CIRCABC

Now you are a registered user. You can enter CIRCABC through its "Login" menu CIRCABC main menu). You are directed to the ECAS login page. Having followed the ECAS "login" link, you select your user domain ("external") and enter your ECAS username and password.

Once successfully authenticated, you are taken back to CIRCABC. The option "Logout" comes along with your username in place of "Login".



#### What if I have forgotten my password?

Follow the link "Forgot your password?" that can be found on the ECAS login page.



Login

Please enter your username and your ECAS password:

Authentication requested by: CIRCABC





### How to change my password?

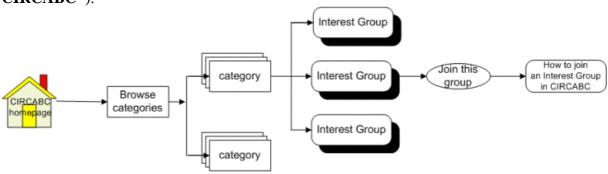
You can change your ECAS password through the "change password" link of the ECAS login page.



# Becoming a member of an Interest Group

# What is an Interest Group?

The Interest Group has been defined in <u>Can you speak CIRCABC?</u> (see "Welcome to CIRCABC").



Navigate and join an Interest Group

### Why to become a Member of an Interest Group?

What makes membership attractive is the possibility to perform a wide range of actions over the contents and to collaborate closely with people who are sharing your concerns and projects.



Membership is free-of-charge.

A unique username and password allows you to become a member of several Interest Groups.

Your rights to access and mange depend on the access profile the IG leader has assigned to you.

# Enter an Internet group in five steps

The below screenshots describe the successive steps from the authentication step to your Interest Group main page. Feel free to try at your own pace...

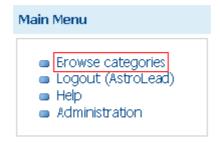
✓ You log in CIRCABC through



You are taken to the CIRCABC main page via the ECAS system:

Welcome in CIRCABC

✓ You click **Browse categories** from the left-top "**Main Menu**":

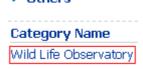


✓ On the next page, you choose a category name under which your category is listed:

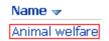




✓ Then you select the category you wish:



✓ Once you have selected the category, you access your interest group by clicking its name:



### Apply for membership

Once you have passed through the authentication step and browsed the categories, you reach the list of the Interest Groups available to you. These are classified under three headings mirroring the CIRCABC main access types:

- ✓ **Members**: shows the Interest Groups of which you have **Membership**.
- ✓ **Registered access**: lists Interest Groups of which you may **become a Member** of. These are only visible for authenticated users.
- ✓ **Public access**: lists the Interest Groups which are accessible to everybody irrespective of authentication.

The Interest Groups that are partly for public and partly for registered access are listed as "registered access".

Once authenticated, you choose an Interest group such as listed under "registered access" or "public access". Clicking "**Join this group**" from the list of the interest groups displays the "**Apply for membership**" page.

The "**Apply for membership**" page is split in two areas:

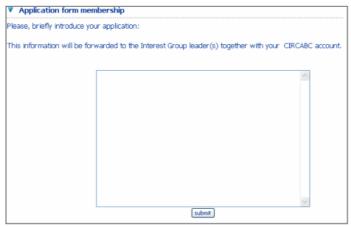
✓ The first one informs you about whom to contact for further details on the interest group:



**Contact the IG leader** 



✓ The second area allows you to apply and, optionally, to put forth the reasons for your application:



**Submit your application** 

Having filled out the application form, **you submit your application**. You get this message in return:

"Your application to the Interest Group has been taken into account. A mail is forwarded to the Interest Group Leader(s)".



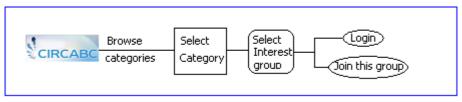
The interest group leader will then accept or refuse your application.

# First steps towards an Interest Group

The previous section has introduced the basics for accessing CIRCABC. You have membership of an Interest Group.

Now let us go on and discover our Interest Group.

#### First-time access

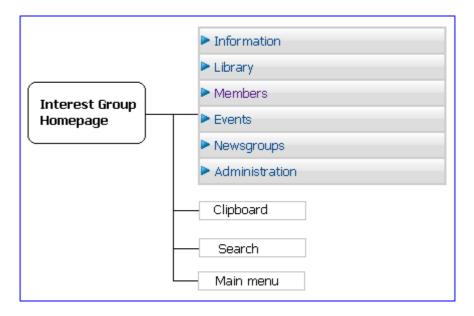


Browse and enter an interest group



Keep in mind that an interest group is characterized by a **group of users** (potentially unlimited), a set of **services** and a collection of **contents**.

Let us take a first glance at your interest group:



The services offered by your Interest Group

Your Interest Group is made of a number of services:

**Information**: you can present information about your interest group as web pages.

**Library**: this is the main service of your Interest Group. It receives your documentary

content.

**Members**: this lists the members of your Interest Group.

**Events**: you can choose the appointments and meetings you would like to attend.

**Newsgroups**: you take part into or create discussions.

**Administration**: this provides features for managing your Interest Group as well as your own account.

To make this list complete, we should add the optional service:

**Surveys**: this enables to participate in surveys published through IPM ("Interactive Policy Making").

Your ability to access each service, the actions you can perform, depend on the permissions you have obtained from your IG leader.



# **About the Library**

# How to deal with the Library

### What is this for?

The Library is the space where **contents** are stored, managed and shared.

-You said "content"... What do you mean?

-The content is the unit of information of the library.

Each **content item** carries a set of information structured as a semantic whole, a meaning supported by whatever type of medium (text, picture, video, sound, multimedia, a piece of software, a web page, etc).

# Whom is the Library intended for?

The IG Leader is free to grant public access to the Library. In this case any user, whether or not authenticated, can read contents.

Otherwise, any Interest Group member who has been

- ✓ authenticated
- ✓ granted access to the Library

can at least read contents.

Depending on the **role** they may play in the Library, the IG members can read only or perform further actions.

It should be noticed that the IG Leader can also deny access to the Library (or part of it) for some users, even authenticated.

The roles related to the Library are:

**Access**: only allows reading contents; you can only download contents as well as their properties.

**Edit only**: you can only edit contents; you cannot create nor delete any.

**Manage own**: you can create, edit and delete your own contents. You can only access the documents created and managed by the other members.

**Full edit**: you can create contents; you can edit any content whoever be its author. But you can delete only your own contents.

**Administrate**: basically, you have as many rights as the full-edit role. Additionally, you can delete any content. Moreover you can organise the Library and manage its users.

**No access**: the access to the Library is denied.

It should be noticed that the roles are not definitely assigned. They can be changed at the initiative of your Interest Group leader or on request.



### What does it look like?

The Library can be figured as a tree of folders (so-called "spaces") filled with content. In the example below, "LIBRARY" is the library of our Interest group. It includes sub-spaces at two levels with sub-space "biodiversity" including sub-space "wild Birds".

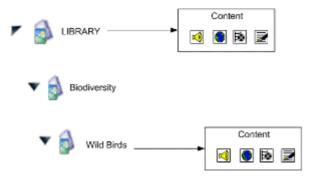
### Library>Biodiversity>Wild Birds



The Library can be split up into sub-spaces

You can add as many branches to this tree as you need...

You can upload content at any level of the tree, including the root of the library as shown below:



The Library structure: sub-spaces and content

Each **space** of a Library is characterized by:

**Properties** (name, description, creation date, modification date);

A set of **actions** authorized for the current user.

Each space can contain sub-spaces and content.

Each **content item** can be defined by:

**Properties** (title, description);

A set of **actions** authorized for the current user.



# Visit the Library

Feel free to jump to the chapter which more especially describes your <u>role</u> in the Interest Group:

Visit the Library through the ACCESS role (page 18)

Visit the Library through the <u>EDIT ONLY role</u> (page 19)

Visit the Library through the MANAGE OWN role (page 22)

Visit the Library through the FULL EDIT role (page 29)

Visit the Library through the <u>ADMINISTRATE</u> role (page 30)

Interest group leaders, please, read also the <u>Interest Group Leader guide</u>.

# Visit the Library with the ACCESS role

You have been given the most limited rights:

- ✓ You are only allowed to read and download contents from the Library.
- ✓ You can choose the language in which you would like to read the multilingual documents.
- ✓ You can view the details of any content but you are unable to modify their properties.

### How can I view the details of contents?

You click the "View details" icon ( ), next to the content name in the main page of the Library. By so doing, you display the content properties.

#### How can I read a multilingual document in my favourite language?

You will find further explanation in <u>selecting a language for the display of contents</u> (See p 32 "**Setting your language preferences**").

#### How can I download content?

You can download contents from the Library's content list by clicking their name.

You can also display its details page (via icon "View details") and click its **file format icon** as illustrated below:



To download content, click the file format icon

#### How to be notified about new content?

Notifications are sent whenever a document is uploaded in the Library of your interest group. An option in your user account allows you to enable or disable them.



Notifications are disabled by default. So, to enable them, select the administration service from the CIRCABC main menu:



The "administration" menu is accessible from the CIRCABC root

Then follow the link "Manage your account":



How to edit your user options

Your user information is displayed. Choose "enabled" in the "Global notifications" field of "User options" pane.



Once done, press on "Save" (at the top-right corner of page "Edit your CIRCABC account"). From now on, you will receive notifications about any new content loaded (initial uploads as well as updates) at the e-mail address which has been recorded in your account.

You are now aware of what you can do if given the lowest role. Let us try now some more active role...

### Visit the Library with the EDIT ONLY role

- ✓ You can read and update contents.
- ✓ You can neither create nor delete any content.



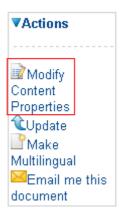
✓ You are allowed to modify the properties of any item (modify a description, change a title and so on).

### How to modify the content properties

You select a content item in the Library.

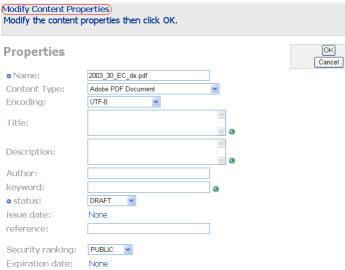
You click the **View details** ( $\sqsubseteq$ ) icon located next to the item name. In so doing, you display the content properties along with the actions allowed.

You pick "Modify Content Properties" from the action list.



Select "modify Content properties"

You are taken to the page "Modify Content Properties".



Customise the content properties

You key in the changes you need and press on the **OK** button: your changes are saved and you are taken back to the details of the document. Click "**Close**" on this page to come back to the main page of the Library.



### Update a document

The Editor can **update documents** in the Library (except for documents that have been temporarily locked).

### Wherefrom can I start the Update action?

You click the "Update" icon ( beside the name of the content in its space's main page:



Launch "update" from the main page of the space...

The "Update" action can be run, also, via the content properties: click "View details" (🖹). Then pick "Update" from the Actions list.



Or select "Update" from the "View details" page

#### How can I load a new version of a content?

By clicking the **Update** icon (**1**), you access the Update form:



Upload a new version of content "birds agreement"

Just select the document to be loaded and click **Upload**. The new version of the document is uploaded. A confirmation message is displayed and the Update button becomes active.





Confirm the updating

Click **Update** in order to validate the action. The content is updated with the document you have just uploaded. You are taken back to the main page of the Library.

Do not forget that you can give up any action before its term just by pressing the **Cancel** button that appears on each page of the action form.

Now for the actions allowed by the role "manage own" ...

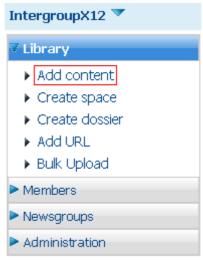
## Visit the Library with the MANAGE OWN role

- ✓ You are allowed to add contents.
- ✓ You may also create sub-spaces in the Library.
- ✓ Since you might have to modify the contents you add, you can edit your own contents. But you cannot edit contents created by others.
- ✓ You can also modify and delete your own sub-spaces.
- ✓ You can delete only your own contents.

#### Add content into the Library

#### Wherefrom can I start the "Add content" action?

You will find the "Add content" action under "Library", in your interest group services list.



Take a look at the Library title bar



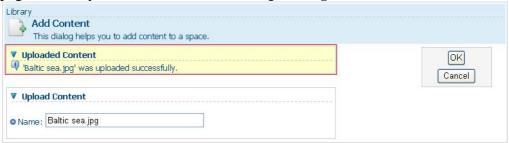
#### How can I add content?

You open the **Add content** dialog and browse your system to locate the file to be uploaded. Once done, you upload the selected file.



How to add content

The next page informs you about the state of the uploading:



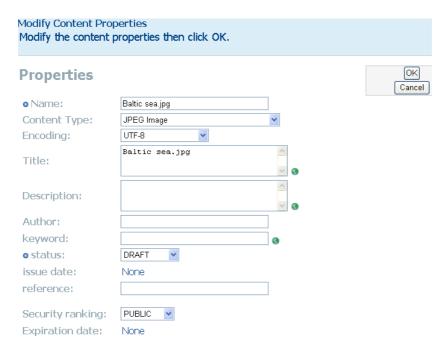
You can still correct the file name if this contains forbidden characters

- But... I really do not know which characters are forbidden!
- These are:

" \* \ > < ? / : |



If you agree with the file name, **press on the OK button**. This takes you to the "**Modify properties**" step.



If you do not wish to modify the content properties, click **OK** or **Cancel. The Name and Status fields are mandatory**.

- I have to manage a document together with its translations into various languages. Does the "Add content" process enable me to take into account the relationship between the original document and its translations?
- You can make multilingual any content you have uploaded (see on page 33).



### Create sub-spaces in the Library

#### From scratch

Once you have reached your interest group, select "**Library**" from the services list. Later, click "**create space**".



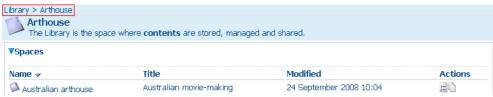
If you can add content, you can create spaces in the Library

You are requested for providing basic properties. The name is mandatory. Then press on **create space**. The new sub-space is definitely created.



Organise the library in sub-spaces

And now you can define another space in this new sub-space of the Library.



We have built space "Australian arthouse" in the Library sub-space titled "Arthouse"



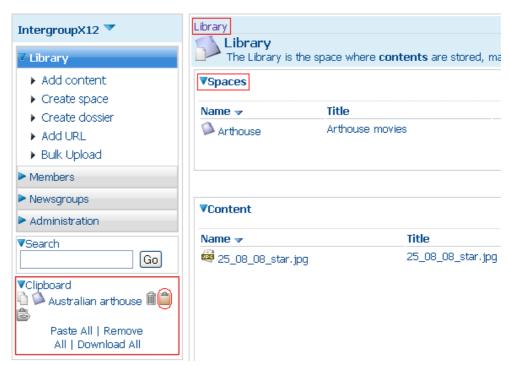
### By copying another space of the Library

You can copy and paste a space in the same way as you do for content.

For instance, let us create a new space in the Library by copying sub-space "Australian arthouse" of space "Arthouse".

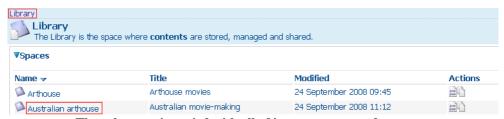
You display the properties of "Australian arthouse" from the main page of "Arthouse" ("View details" icon). You click to "copy" from the Action list of the "Australian arthouse" details page. You go back to the Library.

In the meantime, the clipboard has appeared on left hand, below the "main menu" and shows "Australian arthouse". Click icon in to paste this space to the Library.



Space "Australian arthouse" is ready for being pasted in the Library

The Library contains two spaces, now. If wishing to rename the pasted space, just display its properties (icon "View details" from the main page of the Library).



The sub-space is copied with all of its own spaces and contents



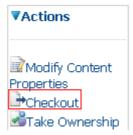
Please, note that in so doing, you copy not only the container but also its whole content, that is to say all of its sub-spaces and content.

#### Check out content and check in

"Check out" provides you with a working copy for adding changes while the main document remains locked for anybody but you. Once you have made all the changes you wish, you "check in" which unlocks the content.

#### Where can I run "Check out" from?

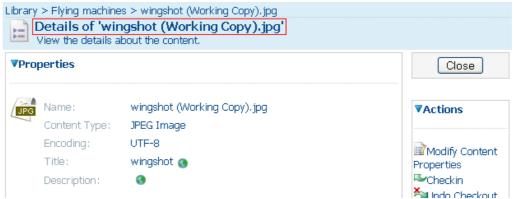
Display the "View details" page of the content to be modified. You find the "Actions" list wherefrom "**Check out**" is available.



"Check out" in the document properties page

#### How to check out?

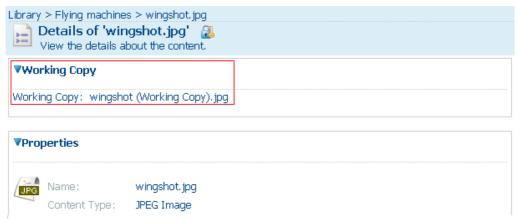
You have selected "check out"; a working copy is created. This copy looks like any other content with its properties, its information content and a set of potential actions.



The properties of the working copy include specific actions



A link to this working copy is added to the properties of the content being modified.



The working copy is accessible there...

Keep in mind, therefore, that the checked-out content has been locked as soon as you have created the working copy. It will remain locked so long as you will keep the working copy available.

Since you have created the working copy yourself, you can see the "locked by owner" icon ( ) in the title bar of its details page. For instance:

Details of 'wingshot.jpg'

The other IG members see the "locked" ( ) icon. So, Details of 'wingshot.jpg'

The "locked" icon is repeated next to the name of the checked content, on the main page of the space.

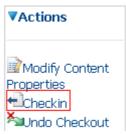
After modification, the content is ready for being checked in. This will unlock it.

What if I change my mind and wish not any longer to modify my document?
- While you have not checked in, you may give up the "check out" action. This can be achieved by displaying the "View details" page of the Working copy and choosing "**Undo check out**" () among the items of the Action list. The working copy is deleted and the content unlocked.



#### How to check in?

To upload the modified document and unlock the content, you **check in** the working copy. The "check in" icon ( ) is located in the Actions list of the "View details" page of the Working copy:



"Check in" in the document properties page

It can be found, also, next to the name of the working copy on the main page of the space.

As a result.

- ✓ The content of the working copy is moved to the original content.✓ The working copy is deleted.
- ✓ The original content item is unlocked.
- ✓ The version number of the content is upgraded (if versioning has been allowed on this content). For example, this number would be upped from 1.0 to 1.1 in case of a minor change. Otherwise it would become 2.0.

#### Delete contents or spaces

Keep in mind that you can delete only your own contents.

You go to the main page of the Library and select the content or space you wish to delete. You will click the "View details" icon () and launch the **Delete** action.

Please, do not forget that as deleting a space, you erase not only the container but also its whole content, that is to say all of its own sub-spaces and content.

### Visit the Library through the FULL-EDIT role

Authors receive this role by default. What can you do with the full-edit role? You can:

- ✓ create contents;
- ✓ modify your own contents;
- ✓ modify the contents of other members;
- ✓ delete only your own contents.

#### Add content

Please, refer to "Visit the Library with the "Manage own" role" (see "Visit the Library"; "Visit the Library with the "Manage own" role" on page 22).



#### Edit content

Please, refer to "Visit the Library with the "Edit only" role" (see "Visit the Library"; "Visit the Library with the "Edit only" role" on page 20).

#### Delete content

Please, refer to "Visit the Library with the "Manage own" role" (see "Visit the Library"; "Visit the Library with the "Manage own" role" on page 29).

# Visit the Library through the ADMINISTRATE role

Please, refer to the <u>Interest group Leader guide</u> to learn how to organise your Library and how to deal with its users.

You will read "Visit the Library with the full-edit role" (see "Visit the Library"; "Visit the Library with the "Full edit" role" on page 29) to know more about document management.



# How to deal with multilingualism

CIRCABC is fully multilingual. Its **User interface**, indeed, is available in several languages while it manages various translations of a same **content item** (content + properties).

In this chapter, you will learn how to deal with the multilingual features of both your User Interface and Library's content.

We shall see how to:

- change the language of the user interface;
- set your own linguistic preferences;
- make content multilingual;
- display the various language versions of a content;
- deal with the translations of a content.

# Which languages for CIRCABC?

### As the language of the User Interface

The User Interface is being translated to the 23 official languages of the European Union. These are ordered alphabetically and coded according to the ISO <u>"codes for the representation of names of languages"</u>--Part 1: Alpha 2 codes (ISO 639-1, alpha-2).

#### As content language

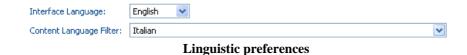
Your documents can be worded in the languages defined and listed in ISO 639-1, alpha-2. These languages are sorted alphabetically, in the following order:

- ✓ the official languages of the European Union;
- ✓ the official languages of the candidate countries;
- ✓ all the other languages defined in the ISO 639-1, alpha-2 standard.

### Setting your language preferences

You can draw your own linguistic profile and specify:

- ✓ the language in which you would like to read the menus;
- ✓ the language in which you would like to read the contents.



Who can use these options?

- Any user can change the User Interface language while only authenticated users can select a Content Language Filter.

### Selecting the language of the user interface

✓ Users, whether or not authenticated, can change the language of the user interface for at most the time of their CIRCABC session. To perform this action, pick a language out of the list presented at the top-right corner of the CIRCABC screen.





Change the language of the user interface, temporarily

✓ Authenticated users may change the language of the user interface for a longer time. To achieve this, choose the "Administration" service from the CIRCABC main menu. Then follow the link "Manage your account". You are taken to a page titled "Edit your CIRCABC account". Pick the language you wish out of the field "language" in the "user options" pane.

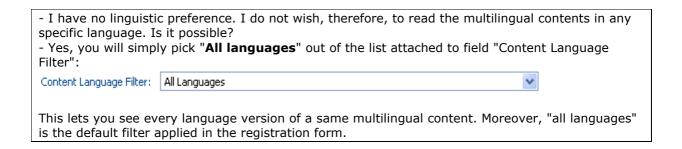


Save your favourite user interface language

### Selecting a language for the display of contents

The User options also allow you to read the contents in your favourite language. For that, you will set a **Content Language Filter**.

Only authenticated users may choose another "Content Language Filter".



✓ To change the Content Language Filter, you must be authenticated. So, once you have logged in, choose "Manage your account" from the CIRCABC "Administration" menu.

Scroll down to the "User options" area, expand "Content language filter" and pick one of the 165 languages listed.



A "Content language filter" is applied



Do not forget that this really makes sense when <u>applied to a group of translations</u> (see "**Displaying translations**"; "*Displaying translations only in your favourite language*" on page 39).

### Dealing with multilingual documents

First, let us learn how to make documents multilingual.

#### Making multilingual

The documents are monolingual by default. You can make them multilingual, if necessary.

### "Making multilingual"... What do you do?

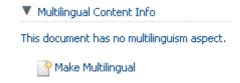
You associate a number of translations to a same original content in a manner which allows you to navigate easily from any translation to the original content and reversely. All of the elements of your so-obtained multilingual document share characteristics (so-called multilingual information) between them.

### Who can make multilingual a document?

Any Interest Group member who can create a document in the library can make it multilingual.

#### How to do?

You can make a content multilingual from its "Details" view: the "Make multilingual" command can be launched from either the Multilingual Content Info pane or via the Actions list.



Make multilingual via the "Multilingual content info" pane



Make multilingual via the "Actions" list



You click the "Make multilingual" command, what takes you to the Make multilingual dialog:



"Make multilingual" dialog

You must mention an author and a language (as expressed through "©", the "required field" symbol). As long as you will not have selected the language of the document, the "OK" button (at the right-top corner of the form) will remain greyed, preventing you from reaching the last step of this process.

Once you have mentioned the language of the document, you can **click OK**. In so doing, you are taken back to the content "Details" page.

Now, the "**Multilingual Content Info**" pane shows information relating to the original document. This information will be shared among all the translations to come later.



View of the "Multilingual content info"

The version number applies to the whole multilingual document.

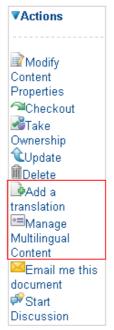
Another area is appeared in the "Multilingual Content Info" pane. This is a reference list of all the translations added into your multilingual document. In the screenshot below, you can only see the name of the pivot translation because no additional translation has been yet uploaded (do not forget that you have just made it multilingual).



New actions become available from the "Actions" list of the "View details" page. These are:

- ✓ Add a translation
- ✓ Manage multilingual content





Other actions appear in place of "Make multilingual"

### Adding translations

You go through two actions:

- ✓ You upload a file;
- ✓ You indicate the author and language of this new content. In the same time, the "related translations" part of "multilingual content info" is updated with the new translation.

#### How can I add translations?

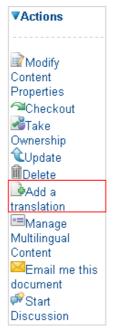
CIRCABC allows you to add translations from three possible starting points:

- ✓ from the "View details" page of any multilingual document;
- ✓ from the "Manage multilingual content" page;
- ✓ from any related translation.

### From the "View details" page of any multilingual document

"Add translation" may be run from the "Actions" list of the "View details" page of the multilingual document:





Add translations via the "View details" page

### From the "Manage multilingual content" page

Once you have picked **Manage multilingual content** out of the "Actions" list of the "View details" page, select "**Add a translation**" as shown below:



Add translations via "Manage multilingual content"

### From any translation

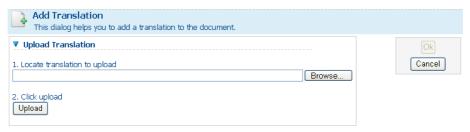
You can increase a series of translations starting from any related translation. You can reach the properties page of the selected translation by following the link "details of content" located next to the file name in "related translations". Then you find the command "Add translation" in the action list of this properties page.



#### How can I add a translation with content?

First, make sure that the content where you are about to add a translation is really multilingual. If not, make it multilingual following the "Make multilingual" procedure (see "**Dealing with multilingual documents**"; "Making multilingual"; "How to do" on page 33).

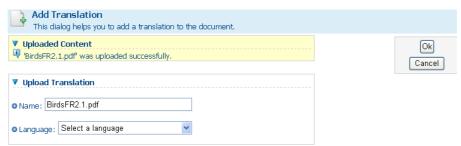
Run **Add translation** from any of the above-listed locations. Firstly, you are requested for providing a file.



How to add a translation with content... First step

Secondly, you detail the properties of the translation you are adding.

You can change the name of the translation. You must indicate its language. As soon as selected, each language is taken out of the list. **The reason why is that you may not add twice a same language version.** 

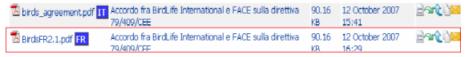


How to add a translation with content... Last step

Remember that symbol ("required field") means that the fields "Name" and "Language" are **mandatory**.

Once you have keyed in the right language and pressed on the OK button, you are proposed to **modify the content properties**. If you need not to modify anything, just press on "**OK**".

Now the translation is presented as a new content:



A new translation has been added

Please, note that:

- ✓ The language codes have been made visible because we have not selected any Content language filter ("Content language filter" option set to "All languages").
- ✓ By clicking either the PDF icon next to each content name or the content names themselves, you reach the full text of the translation.



#### Do not forget that:

✓ You can add another translation either from the original document or from any of its translations.

# Displaying the details of a translation

We shall focus now on the "Properties" and "Multilingual Content Info" areas. Each translation, indeed,

- ✓ includes its own properties;
- ✓ shares properties with every related translation; these shared characteristics are grouped within the "Multilingual Content Info".

# Displaying the properties of a translation

You display the details of a translation by clicking the "View details" icon () which appears next to its name, in the "contents" area of its parent space. Or you follow the link titled "details of content" located next to the file name in the "related translations" pane of the "multilingual content info" section of any other related translation.

The details page shows the following areas:

- ✓ Properties
- ✓ Multilingual information
- ✓ Related translations
- ✓ Version History
- ✓ Actions

The "Properties" pane only describes the current translation. Keep in mind that the "Language" field reads the language of the current translation. It does not refer to the original document (so-called "pivot translation"). Also the version label only refers to the current content.



The "Multilingual content information" includes:

- ✓ properties shared between all the translations;
- ✓ the list of all the translations related to one another.

Properties

Author: Plume

Version Label: 1.0

Auto Version: Yes

Pivot translation: Italian

Security ranking: PUBLIC

Expiration date:



Displaying "Multilingual content info"

The properties listed in "Multilingual Content Info" are common to the whole group of translations. The language field, here, refers to the "pivot translation", that is to say the source of all translations.

### Displaying translations

# How to display translations

You can reach the full text of translations starting from various locations.

### From the "Content items" area of the Library main page

Click either the content name or the file format icon.

### From the "Details" page

The file format icon is available from the **properties** area.



Download translation through the "file format" icon



The table "related translations" in the "Multilingual Content Information" pane of the content "details" page also provides with access to full text:

Click either the translation name or its language code (at end of each translation line)



Download translation from "related translations"

#### Through "Manage multilingual content"

Select the command "Manage multilingual content" from the "Actions" list of any translation of the original document.

The table "Translations" in page "**Manage multilingual content**" gives you an opportunity to download each related translation. This can be done by clicking the link of your choice:

- ✓ File name
- ✓ Language code
- ✓ "View" action



Displaying a translation through "Manage multilingual content"

#### Displaying translations only in your favourite language

As <u>previously explained</u> (see "selecting a language for the display of contents" on page 32), you can select a language for displaying the translations.

If you do not choose any language, each translation comes up with its own linguistic code.



Displaying translations through filter "all languages"



Now, let us imagine that you prefer reading the multilingual document in Hungarian. You pick "Hungarian" out of the list of the Content Language Filters (accessible through the "CIRCABC main menu", "Administration", "manage your account"). Once done, you display the multilingual document again:



Hungarian is the Content language filter

Only the Hungarian translation appears. No linguistic code is added.

What about the other related translations? You still can access them

- ✓ from the "Related translations" area of the "Multilingual content info" pane on the document "details" page
- ✓ from the "translations" pane of the "Manage multilingual content" page.

## Modifying a translation

Once uploaded, the translations are not definitely fixed. At a time, you will probably wish to modify either their text or their properties. This is partly equivalent to modifying monolingual contents. So, through the following lines, we shall just explain what is specific for multilingual documents.

# Who can modify a translation?

Those who are enabled to modify a document can modify translations (refer to **How to deal with the Library**" *for whom is the library intended?* on page 16).

### Modifying the properties of a translation

To change the properties of a translation, click "Modify Content Properties" from the Actions list in the "View details" page (accessible through icon.



Modify the translation properties



Most data can be changed just like in any monolingual document. Replacing the language information, therefore, is specific for the translations:

Since each language is taken out of the properties language list as soon as assigned to a translation, you are proposed a shortened list so as you have no chance of assigning twice a same language.

When modifying the properties of a translation, keep in mind that both translation name and language are compulsory data. So you cannot delete these fields.

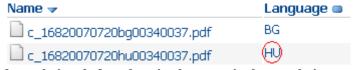
## **Automatic changes**

#### Related translations

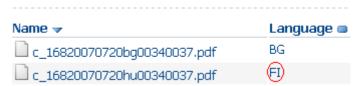
The list of related translations is automatically updated whenever

- ✓ you add or remove a translation;
- ✓ you change the name of a translation;
- ✓ you replace the language assigned to a translation.

For instance, we detail the properties of c\_16820070720hu00340037.pdf and replace Hungarian with Finnish. The list of related translations will read FI as the language of c\_16820070720hu00340037.pdf:



Related translations before changing language in the translation properties



Related translations after changing language in the translation properties

### Version history

The Version label is automatically incremented as soon as the translation has been checked in.

#### **Updating a translation**

You can update a translation as any monolingual content. Please, refer to <u>Update a document</u> (see **Visit the Library with the Edit only role**; *Update a document* on page 21) for more details.



## Checking out a translation

This action is similar to checking out any monolingual content. The "Check out any content content..." (see Visit the Library with the Edit only role; Check out any content and check in on page 27).

Once the new version of the translation has been loaded and saved (see "Check in" action in **Visit the Library with the Edit only role**; *Check out any content and check in* on page 29), the **version number** (visible in "Version label") is incremented.

Name: BirdsFR2.1.pdf
Content Type: Adobe PDF Document
Encoding: UTF-8
Accordo fra BirdLife International
e FACE sulla direttiva
79/409/CEE •

Description: bÿ •
Author: nobody
Size: 90.16 KB

Version Label: 2.0
Auto Version: Yes

During checking in, the version number of the translation is incremented

The **version number of the group of translations** which it belongs to (visible among the multilingual content properties) is not changed. This is changed only if we make a new edition (the edition being an image of a group of translations at a time).

#### **Deleting a translation**

You can delete translations like any monolingual content, just by clicking the Delete icon (iii) in the Actions list of the translation "Details" page (accessible through icon ii). The pivot translation, however, does not show any "Delete" icon. Please, keep in mind that you cannot delete the pivot translation as long as other translations are based upon it.

Reversely, deleting all of the related translations also enables you to clear the pivot translation (the Delete icon ( becomes available from the "Details" page of the pivot translation).

#### Managing the multilingual content

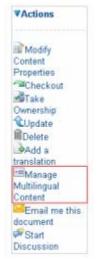
Remember that the multilingual content represents information common to both the original document and all its translations.

The "Multilingual content" area deals with the notion of edition. An edition could be defined like the image of a group of translations at a time. This means that any action performed over the multilingual content affects the whole group of translations.

Therefore, you must be prudent while managing the multilingual content.

The related actions are accessible through the "Manage multilingual content" command of the "Actions" (in the "details" page of the content).





Manage the information about a group of translations

Having selected "Manage multilingual content", you access a page showing:

- ✓ The properties of the multilingual content;
- ✓ The list of the translations of the original content;
- ✓ The edition history (history of the successive versions of the multilingual document);
- ✓ An action list.



Manage multilingual content

# Modifying the properties of the multilingual content

Do not forget that changing the properties of the multilingual content affects the whole edition in which the modifications are made.

In the example below, we change the language of the "pivot translation" (remember that the pivot translation is the original document, so the document all the other translations are based on).



CIRCABC allows you to change it under the following condition: You must choose the new original language among the related translations (see illustration above).

In our example, Irish is the language of the pivot translation. Both the Italian and Bulgarian texts, added later, are based upon it. For some reason, we consider that the translations added from now and onwards should be based on the Italian version. We choose Italian as the new "pivot translation".

Firstly, we select "Change Detail" from the Actions list of the page "Manage multilingual content" (see illustration above).

We can modify the following properties:

- ✓ Author;
- ✓ pivot translation;
- ✓ security ranking;
- ✓ expiration date.

We expand the language list attached to the field "Pivot Translation": the languages there match the language versions listed in the "Translations" pane of "Manage multilingual Content" (see illustration above).



How to change the original language



Once selected, the new pivot translation is shown in the multilingual content properties:



Italian replaces Irish as the pivot translation

#### Creating a new edition of the multilingual content

#### Let us remember...

What is an edition? This is an image of a group of translations at a given time. What is a pivot translation? This is the translation all the other translations are based upon. The pivot translation provides the multilingual properties of the document.

## **Specificities**

The new edition of a multilingual document is a new group of translations of a same document. So it remains a multilingual document.

One of the translations, including the pivot one, grouped in the current edition is chosen as pivot translation of the new edition. The other translations will be excluded from the new edition.

The other translations grouped in the current edition will not be available any more from the new edition.

#### How to do

We shall make a new edition of the multilingual document figured below.



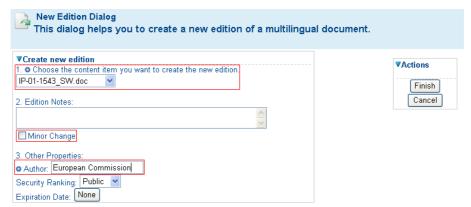


First edition

The current edition groups three translations of a same document (initially titled "Biofuels in transport; IP-01-1543"). These are Irish, Italian and Swedish.

We need to create a new group of translations based on one of the existing language versions. The translations we shall add later will be sourced in the Swedish text of the current edition.

First of all, you select "Manage Multilingual content" from the "Details" page of any of the three translations gathered in Edition 1.0. Then, you click command "New edition" in the Actions list of the "Manage Multilingual content" page (see illustration above). The "new edition" dialog is launched.



Building a new edition from edition 1.0 of a multilingual document

You are requested for providing the pivot translation of your new edition. This must be chosen among the translations existing in Edition1.0.In the example above, we take Swedish.

You are free not to create an edition full different: if you check "minor change", you will just build a sub-version of the previous edition. You will create Edition 1.1 from Edition 1.0, for instance.

If the changes are important enough to justify the creation of a totally new edition, you do not check "minor change". In so doing, you obtain Edition 2.0 from Edition 1.0.

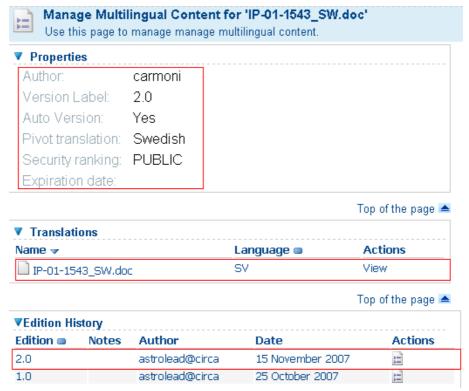
Finally, you enter the author of the new multilingual content and some other properties.



Both the author and the pivot translation are mandatory fields: they are marked as being "required" (symbol...).

You press on the button "Finish", the new edition is saved.

Before coming to an end, let us take a look at the resulting multilingual details:



Edition 2.0: multilingual content information

The "Edition history" has been incremented. It contains information on each edition.

The new edition starts with one translation, the pivot one.

The translations grouped in Edition 1.0 are not directly available from Edition 2.0.

The multilingual properties are similar to the properties of the pivot translation.

- Do you mean that the translations in Edition 1.0 are definitely lost?
- Not at all. You can access them through the "Edition History". Just click the "View details" action besides "1.0"

#### Copy multilingual content

In the below example, we copy a multilingual document which comprises two editions. The second edition contains three translations (respectively in Swedish, German and Dutch). The original document is in Swedish.

We copy the all three translations into another subspace of the library.





Multilingual content of the document we are about to copy

#### **Specificities**

The whole group of translations is copied at one time. In case of a multi-edition, however, only the current edition is taken into account.

#### How to do

You select "Manage multilingual content" from the "Details" page of any of the three translations. Then, you look for command "Copy" in the Actions list of the "Manage Multilingual content" page (see illustration above).

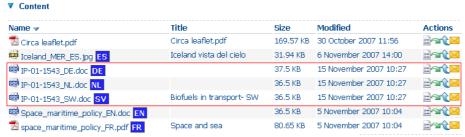
As a result, the page is refreshed and information is displayed at top of screen: "An item was added to the clipboard. There are now 1 item(s) in the clipboard..."

The clipboard is displayed in the left-hand column between the services list and the main menu. It contains the name of the file used as pivot translation and a series of icons symbolising actions. None of the other translations of the group is appearing there.



Once you have browsed to your target-space, you press onto the "paste" icon ( ). Having taken a look at the main page of the target-space, you notice that all the three translations of the group have been copied.

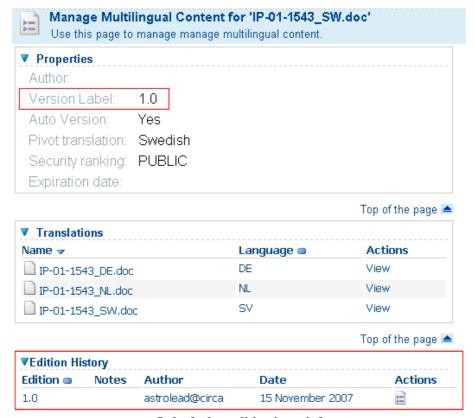




The whole group of translations has been copied

Displaying the multilingual content of any of the three translations confirms that the copied document is still multilingual and contains the same translations as the source document. Moreover this reveals that:

- ✓ The copy has a same pivot translation as the source document;
- ✓ The previous editions of the source document do not appear in the copy. The "edition history" of the copy is back to one.

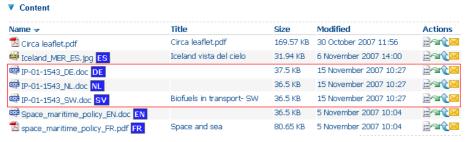


Only the last edition is copied



# **Delete multilingual content**

We decide to delete the multilingual document containing the three translations figured below:



#### **Specificities**

Deleting multilingual content means deleting the whole group of translations. It affects not only the current edition but all of them (in case of a multi-editions document).

#### How to do

You select "Manage Multilingual content" from the "Details" page of any of the three translations. Then, you look for command "Delete" in the Actions list of the "Manage Multilingual content" page.

You are requested for confirming the action of deleting the multilingual document along with all its translations and successive editions.



All translations and all successive editions are deleted

Once you have clicked "OK", each translation of the group is removed from its parent space (Library root or a sub-space of the Library).



The three related translations have been deleted at a time

Now you are proficient in managing the documents of your Interest Group. You can download, add or delete contents. You know how to modify their properties or the



information they contain. You can group them together with their translations in multilingual editions. Let us go on a few further and create direct paths to documents.

## How to deal with links and dossiers

# Create and manage links to contents

In CIRCABC, you can read and download contents. You can also create some kind of shortcuts to the documents (contents, discussions, spaces...) you would like to access quickly and directly. So you set links that will be used alone or grouped together into dossiers. We shall examine now how to make and manage such links.

#### Making links

First it is important to keep in mind that the links you create must point to documents **inside** your interest group.

Having accessed the library (or a library's subspace), you select and copy the contents or spaces you would like to link to. The copied items appear along with "paste" and "remove" icons, in the clipboard view, on left-hand.

Navigate to the space wherein you wish to have links recorded. Then click the icon "paste as link" (""]") besides each item name.



Click the icon "paste as link"

A link is built and pasted in the space you wish It is explicitly shown as "link to" and is symbolised with icon "".



A new link is available from the library

- What about multilingual documents? Can I link to a translation?
- Yes, you can. Such links however will be lost in case of a new edition of the related multilingual document.

# Viewing and editing the properties of a link

A link created in this manner is given a limited set of properties and actions. But we can see in "link destination" its most specific property: this informs you about the location of the linked content.



As for any content, the properties and actions can be seen through the link's "view details" page ("|=" icon).



Link properties such as displayed through the "view details" page

As usually, the actions you can perform over a link depend on the role you may play in the library. Those who have been granted the role "full edit" ("Libfulledit") or "administrate" ("Libadmin") can do the most. This means that they can create, cut, copy and delete links. They can also modify the name, title or description of the link.

#### Downloading through links

To download the linked document, just press the name of the link.

#### Editing links

You can move, copy/paste or delete links. But actions really specific of contents such as making multilingual or versioning are irrelevant.

Several links can be grouped together thematically. This is what we are about to explore by creating and managing dossiers.

# Create and manage dossiers

Take a glance at these pages. You will learn how to group contents together, virtually, in dedicated spaces of the Library.

## What do we call a "dossier"?

A dossier is a thematic group of links set to contents or spaces dispread throughout the library of your interest group. It is important to note that dossiers do not contain the documents themselves, only links.

## Where can you find dossiers?

A "dossier" is a **particular space** of the library. It is usually symbolised by icon ". Its properties are of a space, not of content, and you can only perform actions relating to spaces.



#### How to read dossiers?

You just need the library (or the space in which dossier has been created) to be accessible to you. In other words, you can read dossiers if you can visit the library through any of its associated roles except "no access" (see page 16).

You can browse a dossier as any space of the library, keeping in mind that "contents", in a dossier, means "links". The dossier, being a space, can include sub-spaces.

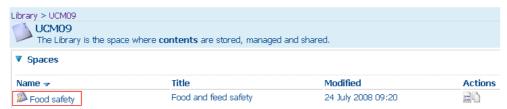
#### How to create dossiers?

## Who may create dossiers?

Creating a dossier requires that you may **create a space** in the library. To do so, you need to be granted the role "administrate" over the library.

#### How can I make a dossier?

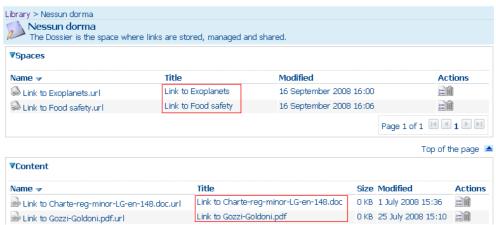
You open the library (or the sub-space of library where you wish to create a dossier). The option "**create dossier**" is shown under header "Library", in the services list. Clicking "create dossier" launches the space creation wizard. At this step, you make a new space. Once built, this space shows Icon "Description" so as to be typified as a dossier.



Dossier "Food safety" created in the subspace "UCM09" of the Library

Having built the structure, you start recording information in your new dossier. **Do not forget that you cannot add contents in this kind of space**. So you will establish links to the contents you would like to access from your dossier.

How can you achieve that? Just select and copy the contents or spaces you wish. Then, you display the dossier main page. Lastly you paste as links the selected contents and/or spaces. Remember that icon "Paste as link".



The dossier is populated with links to contents, spaces and other dossiers



It is important to note that you can set two links to a same document in a same dossier.

- Now what if I wish my dossier to refer to another dossier?
- You just set a link targeting this other dossier.



A link to dossier "linguae" is added into dossier "transportation"

#### How to deal with dossiers

Depending on the role you play over the library, you can perform actions ranging from viewing to deleting:

**Access**: you can display dossiers, follow and email links, view a discussion about a dossier. **Edit-only**: you can display and edit dossiers, follow and email links, edit links in a dossier, view a discussion about a dossier.

**Manage-own**: you can display and edit dossiers, follow and email links, view a discussion about a dossier. You can add, edit and delete your own links. You delete your own dossiers, only.

Full-edit: you have same rights as "manage own".

**Administrate**: you have same rights as "full-edit". Moreover, you start discussions about dossiers.

### How to modify the details of a dossier?

You will find the command "edit dossier properties" in the properties list of the dossier. This list is accessible through the icon "View details" next to the dossier name on the main page of its parent space, meaning the library or any Library's sub-space.

#### How to manage discussions over a dossier?

The procedure is quite similar to creating and managing discussions over whichever space of the library.



#### More actions

Following your role in the library, you can also cut or copy dossiers, in the way you cut/copy any space of the library.

# How to download or upload documents in bulk

# Bulk-download documents from the Library

# Who may bulk-download?

If you may download documents in single, you may also do it in bulk. In other words, you need to be granted at least the **role "access" for the Library**.

#### What can be bulk-downloaded?

Any kinds of items are available for bulk-downloading:

- ✓ spaces created in the Library
- ✓ documents non multilingual
- ✓ translations
- ✓ dossiers
- ✓ links

What you may not get this way is:

- ✓ the whole Library
- ✓ forums, not even single posts
- ✓ contents with a security ranking set to "internal" or "limited"

## How to do?

- ✓ you **select and copy documents** and/or spaces from any part of the library
- ✓ now, just focus on the clipboard: the items are copied there. In the below part, you find the link "**Download all**"



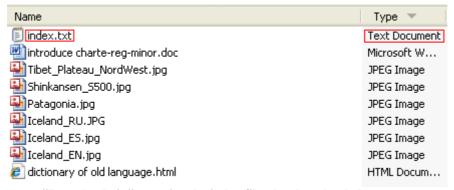
✓ you press on "Download all". A zip file, titled "**Download.zip**" is issued.



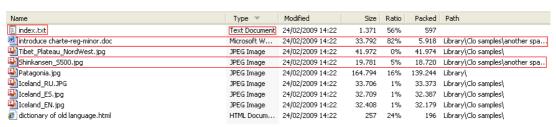
We bulk-download a space, a URL, translations, a link and a single document

## The file "**Download.zip**" contains:

- ✓ An index file. This text file gathers the properties of each downloaded document.
- ✓ Every downloaded document



"Download.zip" contains the index file plus downloaded contents



Each document of a space bulk-downloaded is listed separately



We have bulk-downloaded a link set to document "Patagonia". The file "Download.zip" presents the linked-to document (see figure above, document named "Patagonia.jpg").

- -What happens if the clipboard contains a **confidential document** among the items to be bulk-downloaded?
- -It does not matter. The confidential document is just ignored while the other items are downloaded.

# Bulk-upload documents into the Library

You bulk-upload through an archive made in an open file format, for instance, a .zip archive. This file contains

- ✓ An index file. This text file gathers the properties of each document to be uploaded. It is optional;
- ✓ The documents themselves.

In a first time, CIRCABC provides basic bulk-uploading. The index files will be processed in a further release. Therefore, this guide does not explain how to make them.

# Who may bulk-upload?

Those who may load documents into the Library can do bulk-uploads. In other words, you need to be assigned any of the following **roles over the Library**:

- ✓ Manage own
- ✓ Full-edit
- ✓ Administrate

### What can be bulk-uploaded?

You can load documents in any format. These will be documents non-multilingual as well as translations.

Wish to load links, dossiers or URLs? Please, be patient; this will be possible through a further version of CIRCABC.

- Can I manage my multilingual documents through the bulk upload?
- Making an index file allows you to **add translations** to an existent multilingual document. It also helps loading a full multilingual document comprising an original version and several translations. So these features will be available from a further version of CIRCABC.



#### How to do?

- ✓ You group the files to be uploaded and the index file in a **zip archive**
- ✓ Optionally, you define the **index file** which comes along with the files to be uploaded You put it at the root of the archive
- ✓ You enter your interest group and display the Library's space you want to start the upload into. You **launch the bulk-upload**.

# You group the files to be uploaded in a zip archive

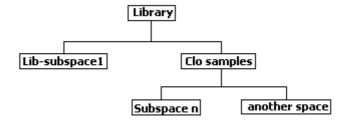
The path, in the zip archive, to the items to be uploaded defines the space structure that will be used for storing the documents in the Library.

In the example below we would like to upload some files at the root and others in subspaces of the Library, following the tree figured below:



We want to bulk-upload to each of these locations

- So the source folders on my system and the target spaces in the Library should have similar names. What if any of my source folders cannot find any equivalent space in the Library? Does the upload fail?
- In this case, the spaces required are created in the Library, automatically, as you run the upload.

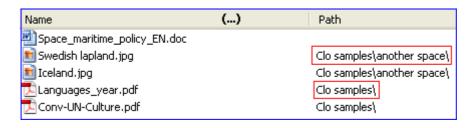


the structure of our Library, after the upload

Our file repository contains a folder so-called "Clo samples" which includes a sub-folder titled "another space".



The documents we want to store in CIRCABC are grouped in a zip archive a detail of which is shown below:



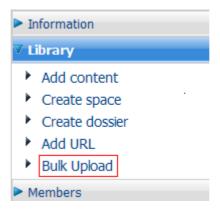
### Optionally, you define the index file

Not yet available

#### You launch the bulk-upload

You access your interest group and display the main page of the space from which the upload should start. In the current example, all of the paths of the files to be added are relative to the root of the Library. So you display the **main page of the Library**.

Once there, you select "Bulk upload" from the Library main menu:



You **input the zip archive**, titled "Upload.zip", that you have just built. You click "upload". The archive is loaded and analysed.

The uploading is evaluated; an **error report is issued**. This can contain two types of error:

- ✓ **Fatal**: this mistake prevents the documents to be added. You can only cancel the current bulk upload to take time to correct before trying again. Or you can go back to the previous step to choose another archive.
- ✓ **Warning**: this type of error is not blocking. You have no obligation to modify anything. The bulk upload is made as well.





Currently, we cannot provide any index

Not to provide any index file brings up only a warning since this index is optional. So this does not matter regarding the achievement of the bulk-upload.

If the evaluation results only in warnings or even in no error, you press on the **NEXT button** again. Lastly, you **press on FINISH**. The documents are stored to the Library subspaces defined according to the paths read from the archive. The spaces which did not yet exist are created, automatically.

The bulk upload has been completed. The right information can be found in the right place:

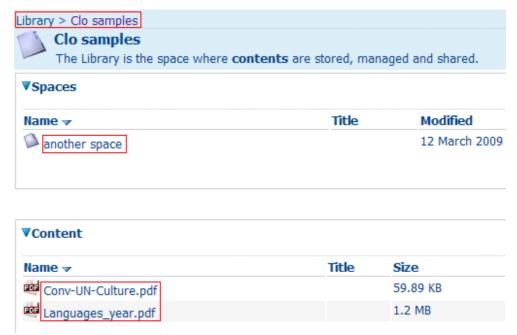
✓ The document "space\_maritime\_policy\_EN.doc" had no path detailed in the zip archive. This means that it was expected to be located at the root of the Library of the target interest-group. And this is the case:



Space\_maritime\_policy\_EN is accessible from the root of the Library



✓ The documents "languages year.pdf" and "Conv\_UN\_culture.pdf" are expected to be found at the root of folder "Clo samples". Such section, if not existing in the Library of the target interest-group, is created by CIRCABC. Then the documents are placed into it:



Both documents are contents of the space "Clo samples"

✓ The images "Swedish Lapland" and "Iceland" were accessible from the sub-folder "another space" of folder "Clo samples". The target interest-group reflects this structure:



Both images are contents of the sub-space "another space"



# About the newsgroups

You might wish to exchange your views with the other members of the Interest Group. This is possible thanks to the Newsgroups service.

Specific forums can also be launched from any content of the Library.

# Some more about the "Newsgroups"

# What is "Newsgroups"?

"Newsgroups" is one of the services of your Interest Group. It contains forums about any theme having raised the interest of your community of users.

# Who can participate in newsgroups?

Participating and performing actions in "Newsgroups" is conditioned by the role you are permitted to play in this service. Such role is assigned to you by any Interest Group administrator (your IG Leader, for instance).

Specific roles are attached to the Newsgroups service:

No Access: You cannot participate in any discussion, nor even read any message;

**Access**: You can read posted messages but are unable to post any;

Post: you can read and post messages;

**Moderate**: you can create topics and post messages. You can delete your own topics and messages; you can access moderated articles and approve or reject them. Please, note however that the article moderation is not yet implemented in CIRCABC.

**Administrate**: you can create, administrate and delete forums. You can create topics and post messages. You can delete any topic or message.

"Newsgroups" is accessible through the CIRCABC main menu.



**CIRCABC** main menu

# What does the Newsgroups service look like?

The newsgroups service is hierarchically structured as shown below:

Forums>Topics>Posts



A Forum is the place where the members of the Interest Group can read discussions or exchange their views.

A Topic is the subject of a group of messages.

A Post is an original message or a reply to a message.

Each forum contains "Topics". In each Topic, "Posts" are created, read and answered.

# How to manage newsgroups

# How to deal with forums

# Access forums

First of all, you select "Newsgroups" from the CIRCABC main menu. In so doing you access the "Newsgroups" welcome page where the forums are listed.



The Welcome page of "Newsgroups" presents Forums

### Create forums

Users who are granted the "Administrate" role over the Newsgroups service can create forums.

They choose "Newsgroups" in the interest group services list. Then they choose the option "Create forum".



Select "create forum" from the "Newsgroups" menu



# How to deal with topics

## Access and read a topic

The topics discussed in a forum are listed on its welcome page. To access a topic, you enter the "newsgroups" service and click the name of a forum of your choice. The topics developed in the forum are listed on its Welcome page.

You can see their name and the number of answers their initial message has received.



Topic "Expansion" contains one message plus one answer

By clicking either the name of a topic or its "Topic" icon (), you access its content, that is to say a list of related messages.

## Create a topic

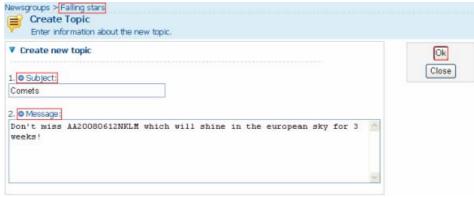
Those who have been given rights "Administrate", "Moderate" or "Post" over the "Newsgroups" service can create topics.

While the forum welcome page is displayed, the option "Create topic" is revealed under the "Newsgroups" option of the services list.



What you see if you are allowed to create topics

You press on "Create Topic" and access a form wherein you can add a new subject.



Create topic: both subject and message are mandatory



You must enter both a message and its subject. If any of them is missing, an error message is displayed and the new topic fails to be saved.

# The message will be shorter than 200 characters.

Click "OK" to validate the creation. You are then taken back to the forum welcome page where the new topic is listed.

# How to deal with posts

# Access and read a post

The messages can be accessed through the topics they depend on. To access a post, you enter the "newsgroups" service and click the name of any forum of your choice. Then you choose a topic and click its name or its "View topic" icon. The posts it contains are listed on its Welcome page.



The Welcome page of topic "Comets" presents Posts

You can see the text, author and posting date of each message. You can answer through the icon "post reply" if granted sufficient <u>permissions</u> (see on page 63).

#### Create a post

You can either answer a message or create a post from scratch.

To reply to a post of your choice, just click the "post reply" icon as suggested above. This displays the following form:



Reply to a post under Topic "Comets" in forum "Falling stars"

You cannot send an empty message. The message will be shorter than 200 characters. If you click OK, the message is "posted", that is to say, made available from the Topic Welcome page.



To create a post "from scratch", open a forum, click the name of a topic. Then, select "create post" from the "Newsgroups" option of the CIRCABC main menu.



Add a message into a Topic

The "create Post" form is displayed. You can fill it out, following the rules expressed above (no empty message; message shorter than 200 characters). You will finally click "OK" and the new post will be listed in the main page of the Topic.

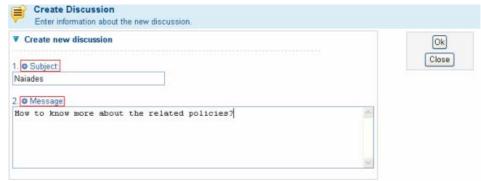
# How to manage the discussions launched over contents of the Library

These specific discussions are directly launched from contents of the Library. Users are given opportunity of viewing discussions, starting new ones and keeping them going. Start a discussion over a content means create a new discussion about some content of the Library. Only those who may create contents may start such discussions.

## How can I start a discussion?

You open the "**Details**" page of the content you wish to discuss about. You will find the icon "**Start discussion**" ( ) in the Actions list.

The "Create discussion" dialog is launched. You type in a subject as well as the text of your message. Both "subject" and "message" are mandatory.



A new discussion is started

Once you have posted a message, its subject is listed as a new topic. Other members can read it and reply.



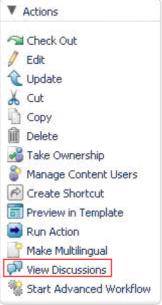
To create a new topic, click the "View discussions" icon from the actions list of the "Details" page. The list of topics is displayed while the "create topic" command is made available in the services list, under "Library":



Click "create topic" to broaden the discussion

# How can I participate in an ongoing discussion? Access and read messages

As soon as an IG member has posted a first message, the "View discussions" icon ( comes up in the action list of the content's "Details" page, in place of "start discussion":



View discussions

By clicking this icon, you can reach the discussion topic list

*In the example below, the discussion has just been started and contains only one topic:* 



Select a topic



To access and read a message, you click either its subject or the Ficon. You are then taken to the "Browse posts" page. This shows the message, its author, the date when it has been posted and the actions you may perform.



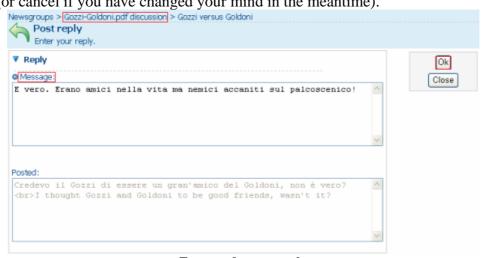
**Browse posts** 

If allowed to post messages, you can reply.

# Post a reply

To participate in the discussion, by sending a reply, you click the icon that can be seen in the "Browse posts" page (in the actions list, next to the message).

The post reply dialog is launched. You type in your answer or comment before clicking "Reply" (or cancel if you have changed your mind in the meantime).



Enter and post a reply

Your answer is then listed as a posted message. Other IG Members can read it and/or reply.



# About the notifications

Would you wish to keep yourself aware of any upload made into the library of your Interest Group? To follow at any time the conversations your fellow-members are exchanging through the newsgroups? If so you will subscribe to the "notification" service.

#### Some more about the notifications

Whichever role you play in your interest group, you can keep aware of some events occurring in the library and the newsgroups. You receive detailed alerts in your mailbox.

# What is notified?

You can ask for getting a notification whenever a member of the Interest Group:

- ✓ uploads a document in the Library
- ✓ expresses oneself via the Newsgroups

In the library, the notified uploads include:

- ✓ The initial uploading of new documents (standard, bulk or via e-mail)
- ✓ The updating of contents
- ✓ an existing document to be replaced by a new version
- ✓ a translation to be added to a multilingual document

In the newsgroups, are notified:

- ✓ the adding of a new topic in a forum
- ✓ the answer to a message posted via a forum

### What does a notification look like?

CIRCABC sends short e-mails showing a link to the notified content, its location and main properties. In the specific case of a topic in an ongoing conversation, the e-mail also contains the body of the message posted.



# Below are samples of notifications:

Dear DELBOSC Nelly,

Please note that booklet languages year.pdf, the below-described document, has just been uploaded in the interest group Intergroup X12 (category: Category12).

The properties of this document are listed below

- title: booklet\_languages\_year.pdf
- created: Wed Sep 10 08:14:07 MEST 2008
- modified: Wed Sep 10 08:14:17 MEST 2008
- security\_ranking: PUBLIC
- status: DRAFT
- direct acces url: https://circabc.development.europa.eu/w/browse/a99dbc65-7eff-11dd-b55a-49dd025873cf

Please do not reply to this message. This having been sent automatically, no one would receive and read your answer.

Best regards,

The CIRCABC Team.

#### A new content has been uploaded

Dear DELBOSC Nelly,

Please note that a new message has been posted under the topic <u>The future of young farmers</u> of the interest group <u>Intergroup X12</u> (category: <u>Category 12</u>).

AstroLead@circa has written

Where can I find more information about this topic? I'm highly interested in the evolution of this job and the role of managers of the landscape young farmers are now playing.

Please do not reply to this message. This having been sent automatically, no one would receive and read your answer.

Best regards,

The CIRCABC Team.

A new topic has been added in Newsgroups

# Who does receive notifications?

This service is reserved for the members of the interest group (the "access" profile is enough for being able to accept or reject notifications). The interest group leader may choose which users and which access profiles will receive notifications. But remember that the notification service is first of all tailored to your needs. Whatever was decided by the IG leader, you can at any time set your own user notification status.

# How to manage the notifications

# How can I start or stop receiving notifications?

Your notification status, indeed, indicates under which conditions you can or cannot get the notifying e-mails. It is made of:



- ✓ A global authorisation
- ✓ A user notification status
- ✓ A profile notification status

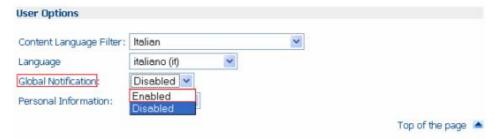


The notifications default to off

You can edit the two first options whereas only the IG leader is able to let a whole group of users (all users with a same profile) subscribe.

#### A global authorization

The notification service is disabled by default. To get a chance of ever receiving notifications, you must **enable them at the global level of your user account**. How to do that? As soon as you get connected, press the "**Administration**" link from the CIRCABC "main menu". Click the "**Manage your account**" option. Your user account is displayed. Scroll down to its "user options" section and turn "**Global notifications**" to "**enabled**". At last, press on the "**Save**" button at the top-right corner of the "Manage your account" form.



Enable the notifications to reach your mailbox

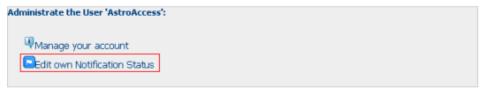
#### A notification status for user

Once you have set "global notification" to "enabled" (do not forget that this is a sine qua non of receiving notifications), you have to check your user notification status. This must be set to "subscribed" to let warnings reach your mailbox. This status, however, defaults to "unsubscribed". It can be defined by your interest group leader but you are free to change it. As a matter of notifications, indeed, users' wishes prevail.

Now let us see how to modify this profile.

You select "Administration" from the main menu of the interest group. You are proposed various actions, according to the role you may play. If you have been granted the lowest role in each service, that is to say "access", you can see at least the two options illustrated below.





How to subscribe the alert service for all or a part of your interest group

You choose "**Edit own notification status**". The three components of your status are then displayed. You can notice that "**notification profile for user**" is editable. Turn it to "**subscribed**".



Edit the notification status for user

Now you can receive the notifications about events occurring anywhere in the library and the newsgroups.

#### A notification status for profile

Your interest group leader can determine a notification status to be applied to all the users who share a same user profile. For instance, all of the "authors" will receive the notifications about documents uploaded into the library and none of them will be informed about the messages exchanged through some forum of the newsgroups service.

The interest group leaders are the only ones who may define or modify a profile notification status.

- So, let us imagine that, as a "contributor" I may not receive emails about documents loaded in a section of the Library. But I really wish to get them. What can I do?
- Do not worry about it! Just remember that your user notification status prevails over the profile status notification. So, you will just turn the user notification status to "subscribed".

## How can I receive only targeted notifications?

Would you prefer to be alerted to contents just loaded in a certain sub-space of the library? Or would you be interested in the messages sent via one forum, not others? This is really easy to obtain.

#### Being warned of events in one space of the interest group

We have just seen how to set your notification status at the root of the interest group (on page 72). This action covers the whole library and newsgroups. But the notification process can be limited to a space of the interest group, as well. This means that you can get (or the interest group leader can let you get) warnings concerning the only library or the only newsgroups service.



For instance, we shall consider that you wish to be informed about any new upload occurred in the library but you are not interested in the dialogs taking place in the various forums of the newsgroup service.

You simply select "Library" and then "Administration" from the main menu. Now you repeat, at the level of the library what was <u>explained above</u> (see page 72).

To make sure not to be notified of the newsgroups, repeat this process after having selected "Newsgroups" from the main menu of the interest group and set "user notification status" to "unsubscribed".

- I read "inherited" in my user notification status at the level of the library. What does it mean?
- "Inherited" means that you are granted, at the level of the library, same permissions as you have at the level of the interest group. If you are uncertain about your status at the root of the interest group and wish to check it, click on the name of the interest group in the CIRCABC main menu. Then go to "administration" and "Edit own notification status". If you can read "subscribed" besides "user notification status", do not change anything: you have inherited the permission of receiving notifications at the level of the library, as well. In the opposite, if "unsubscribed" is written, go back to the library and activate the "administration"/"Edit own notification status". Now turn "user notification status" from "inherited" to "subscribed". You will receive the notifications of new uploads.

#### Being warned of events in one sub-space of the library

The following explanation is also valuable for forums of newsgroups.

If you wish to keep aware of the life of only certain section(s) of the library, you browse to each these sections and repeat, at their level, the process <u>explained above</u> (see page 72). If, here too, you find "inherited" as a status, please look at the short <u>dialog above</u>.

Armed with such information, you can manage the notification system at your convenience, deciding by yourself what you wish to be warned of.



# About information service

### What information? Whom for?

With the information service, users outside the interest group, as far as granted rights enough, can browse an overview of your interest group as it was a website.

This service consists of two parts:

- ✓ A repository: information to be published is stored there;
- ✓ A publishing area: this is the place where links to information are published.

Users granted with the role "**infaccess**" can browse the service and look at the links placed in the publishing area.

Those who play a role as "infadmin" can

- ✓ upload, modify, remove documents on the repository;
- ✓ create links to be published in the publishing area;
- ✓ manage users' rights over the information service.

Leaders, look at the leader guide to know more about how to add content and publish links on the information service.

# Take a look at the information page

To browse information, users with role "infaccess" select "information" from the interest group main menu:



<sup>&</sup>quot;Information" is one of the services of the interest group just like "Library"



The content of the information page is displayed like a web page.

#### EU:photo gallery



See also http://europa.eu/abc/european\_countries/index\_en.htm





User has chosen service "information" from the main menu

Some of you cannot display such pages directly from the option "Information".

This is the case if your browser does not accept Java script or it has been configured to block pop-ups.

You can then reach the pages by following the link presented on the main page of the Information service:





## **About Events**

Events keep you posted about the meetings and various events that are organised in the frame of an interest group on CIRCABC. This is achieved through a calendar and notification system.

#### Whom does it address?

Specific roles have been defined for this service. So, depending on your access profile, you can you are granted with one of these roles:

- ✓ Administer ("Eveadmin")
- ✓ Access ("Eveaccess")
- ✓ No access ("Evenoaccess")

The IG Leaders are the only ones who can administer events. If you are an IG Leader, please, visit the Leader guide to know more about creating, managing or deleting events.

Most of the access profiles may access the calendar by default.

By default also, guests (those who have no username) and registered users external to the interest group may not access to the Events service.

Both "Eveaccess" and "Evenoaccess" can be configured by the interest group leader so that public at large, as well as any registered user, can look at the appointments made.

# Which type of events can I check?

Single or repeated events (meaning appointments, specific tasks, etc) are scheduled. You can also get information about meetings ((face-to-face as well as electronic). Events and meetings are independent from one another.



# Enter the "Events" service

You have got connected to your interest group and its main menu is displayed. Press on option "Event" in this menu.



Clicking there, you can check scheduled meetings and appointments

The first page you see is a calendar. This is divided in months, by default. It shows all meetings and events you could attend.

- ✓ Meetings are tagged with letter M
- ✓ Events are tagged with letter E

In the example below, we are potentially invited to

- ✓ A meeting which happens only once ("single meeting")
- ✓ A repeated meeting (happens every 5 days but not more than twice)
- ✓ An event which happens only once ("single event")
- ✓ A repeated event (happens at three times on a daily basis)



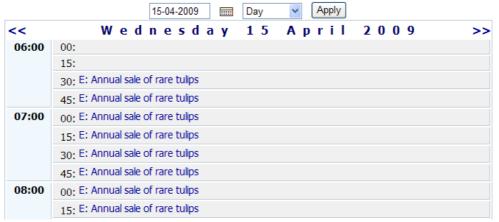
The current or requested day is coloured in light blue

You can change the layout of the calendar from "month" to any of these spans of time:

✓ Daily



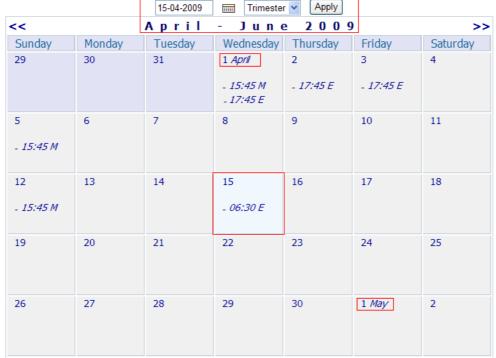
- ✓ Weekly
- ✓ Quarterly



We take an overview of events occurring on 15-04-2009



We check what is appointed for the week around 15-04-2009



We check appointments for the trimester 15-04-2009 is included in



## Check your meetings

#### Some more about "Meetings"

Everybody is liable to attend meetings scheduled in every interest group on CIRCABC.

Meetings can be "open" or "closed".

**Open** meetings are limited to the membership of your interest group. No request meeting is created in the event manager of your mailbox (unless the IG Leader specifically ask for a request to be created for every member of the interest group).

#### **Closed** meetings can bring together:

- ✓ members of your interest group
- ✓ members of any other interest group on CIRCABC
- ✓ registered users (users with an identifier) being not invited in any interest group
- ✓ anonymous users (users without identifier)

Every invitee receives a meeting request in the event manager of their email service.

The details of meetings are recorded in the Events service.

- You just told me that I may be invited to a meeting organised by a different interest group. Let us suppose I have no membership of this other group. How to get information about the meeting in question? How to confirm or refuse to participate?
- When invited to attend a closed meeting, you receive a meeting request giving you the opportunity to accept or decline invitation. You can also take advantage of this message for asking details about the appointment.

### Look at the details of a meeting

Enter your interest group and select the option "Events" from the main menu. Having selected a date on the calendar, click on the starting hour of the meeting. Its details are displayed.

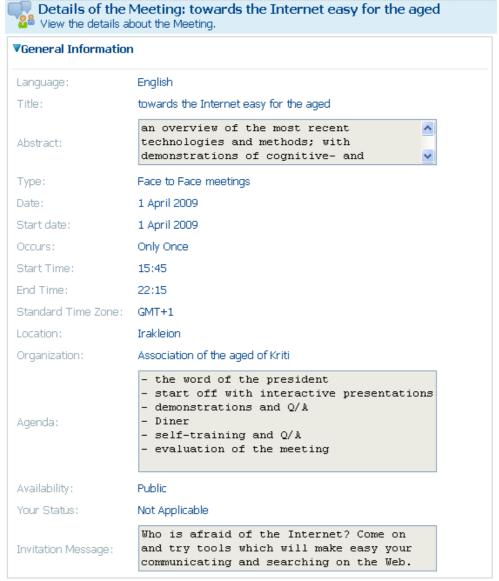
*In the following example, we want to know more about a meeting which starts at 15:45 on 2009-04-01:* 



We click "- 15:45 M"



*The link titled "- 15:45 M" takes us to the details of the meeting:* 



The general information is displayed among other details

The illustration above shows the details of a single meeting: the "date" and "start date" are the same. In the case of a repeated meeting, "date" contains the date of the occurrence you are checking.





Only one meeting request will be created, on the date of 05-04-09, with every occurrence listed

#### Make your choice

If the meeting is closed and you have received a meeting request (or an event has been created in your mailbox), you are free to reply and ask for further information or make your choice.

On the other hand, the view of the meeting details gives you an opportunity to answer to the invitation.



If you did not get any meeting request, you can answer as well

In the case of a closed, repeated meeting, you will accept/decline every occurrence at one time (the meeting request being created only once).

#### Check the events

#### Some more about "Events"

Events look like meetings, the only difference being that the invitees to an event **cannot** accept nor refuse to attend.

Like meetings, events can be <u>"open" or closed"</u>, <u>"single" or "repeated"</u>.

You can be notified by email. In this case, repeated events will be listed all together in a single message.



# **About searching**

CIRCABC enables you to find any space, content or post from anywhere in your interest group,

- ✓ The search engine reads the **full text** of the contents as well as the files name and title.
- ✓ It does not look at the "description" field.
- ✓ It explores only the last version of the contents.

"You seem to tell about searching over text. But what about finding images, sound-recording, etc? -No matter, such items are linked to textual metadata (i.e. their name). The search engine examines their name and some properties. Moreover the format of the file can be used as a search criterion.

# How to do a global search

You can start a search from any location in your interest group. You find text from the name, title and full text of any content and from the name of any space.



Enter search keys and click "go"

#### Search syntax: Proximity

You may want to find out two or more words next to one another? Just **double-quote the expression** you are looking for.

Let us look for the expression "Wild birds". We double-quote it into the search box. Our request comes up with one result, a space titled "Wild birds":





- The query was: "wild birds"
- "- But what if we **forget to double-quote** the search term and simply write wild bird?
   Nothing serious, indeed! The search is a little more "noisy" since the search engine looks for any space or content including **either or both these words** (as shown below)."



And there the query was: wild birds



# Search syntax: operators OR, AND, NOT

Keying **OR** between two terms allows you to find the items containing either or both these terms; typing **AND** means that you ask for the items which contain both these terms.

A blank character set between two words means "OR", the default Boolean operator.

The request Wild birds comes up with

- ✓ the items containing only the word "wild",
- ✓ the items containing only the word "birds",
- ✓ the items containing both "wild" and "birds" (not necessarily next to each other).

The request "wild birds" water provides

- ✓ items which contain only the expression "wild birds",
- ✓ items which contain only the word "water",
- ✓ items which contain both the expression "wild birds" and the word "water".

# Search syntax: the wildcard

The asterisk symbol (\*) may be used in place of one or more characters, existing or not. It can hide any part of a word:

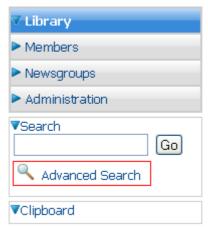
Cat\* stands for cat, cats, caterpillar, etc \*ouse stands for house, playhouse, grouse, etc C\*an stands for cetacean, cyan, can, etc

The general search enables you to perform the most frequent queries. And you can take advantage of the advanced search to execute fine-tuned requests.

#### How to conduct an advanced search

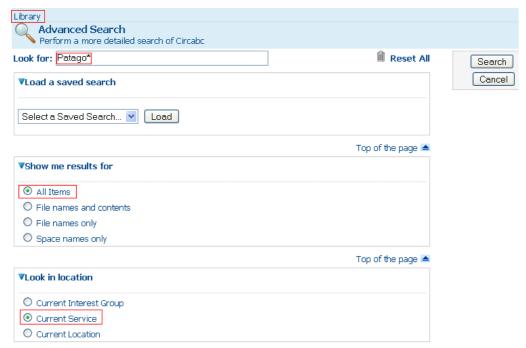
The queries you make through the **advanced search** can involve more criteria like dates, time spans, specific file formats ... You can also look at specific sub-spaces or retrieve only documents in a given language.





This option is available from the main menu

Clicking "advanced search" takes you to a detailed interface from which you can select various kinds of data. For instance, you can read the whole interest group or narrow the exploration to the service (Library, Newsgroups, etc) from which you have launched the advanced search. You can even limit the checking to a very location inside a service.



This request explores all spaces and contents of the Library

The various areas of the search mask are linked together with the operator "AND".

The other information potentially explored by the search engine are:

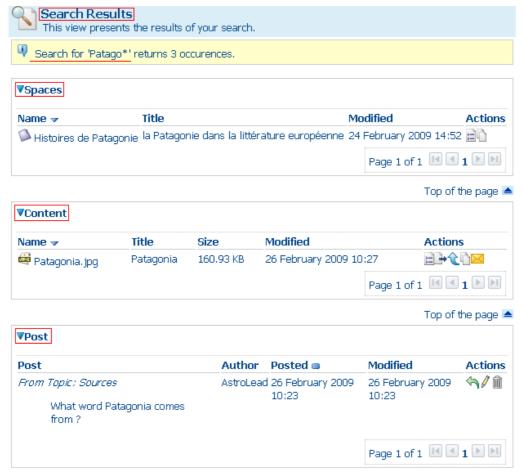
- ✓ title, description and author
- ✓ keywords assigned
- ✓ any type of date or time span
- ✓ the file format
- ✓ additional information such as the status, security ranking, reference or URL



You can also check documents written in

- ✓ all languages
- ✓ the content language you have set
- ✓ another language

The results are sorted into spaces, content and posts.



You can perform actions on the spaces and contents coming up as results

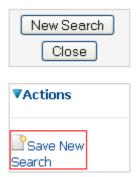
#### How to save and re-use searches

Once you have managed to build a complex request, you may want to launch it periodically. On CIRCABC, you can save and re-use search masks.



## Save your search masks

The command to save a search mask is accessible from the results page.



You can save global as well as advanced searches

First you build a mask and click search. Examining the results, you can evaluate how pertinent your research is. If you agree with the criteria you have previously chosen, follow the link "Save new search". This can be found in the "actions" list, below "new search" and "close".

You are requested for providing a name and description to the saved request.

Please, keep in mind that:

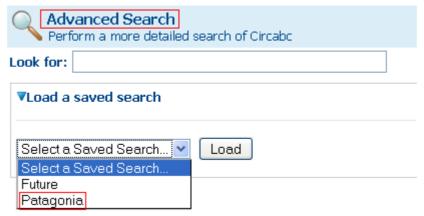
- ✓ You cannot give a same name to two different searches;
- ✓ You cannot delete a saved search

## Launch again saved searches

All saved requests, global as well as advanced, are available through the "Advanced search" page.

Once you have reached this page, select the name of the request to be loaded. The saved search mask comes up at screen.

You can launch it again as is or modify. Do not forget that you must save the modified search under a different name.



Load saved searches, global as well advanced



- I have inadvertently closed the results page and I would like to consult again. How to do?
- Follow the link titled "Last search" from the CIRCABC main menu:

