EUROPEAN COMMISSION
DIRECTORATE GENERAL
for INFORMATICS

iDABC
Pan-European
eGovernment Services

CIRCABC User guide

CIRCABC

Welcome to the CIRCABC user guide!

This guide aims to help you in your daily use of CIRCABC. It is complemented with the "**CIRCABC Interest Group Leaders Guide**", the manual for the users in charge of managing CIRCABC communities of users with their private workspace.

The User Guide intends for **first-time and advanced users**. It is not aimed for the Interest Group leaders. If you are about to lead an Interest Group, you should also read the "CIRCABC Interest Group Leaders Guide".

The CIRCABC User guide is currently offered in English. It will be translated into the other official languages of the European Union, in the same time as the CIRCABC user interface.

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.

It is intended to replace CIRCA (Communication and Information Resource Centre for Administrations), an e-government solution supporting the online collaborative activities of the European Union's public administrations. Since 1997, CIRCA has been running as an IDA(BC) service and has been used by more than 30 Directorates-General and in particular by the committees and consultative bodies established to support collaboration between the Member States and the EU institutions. More than 70 national administrations have received a free licence and use it for their own needs.

The CIRCABC groupware enhances the performance of CIRCA in terms of capacity, security, availability and interoperability. Its user interface will be available in 23 languages. Moreover it is adapted to the needs of people with disabilities.

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

- ✓ Manage translations: these can be uploaded and modified through version-controlled multilingual editions
- ✓ Search in multilingual documents
- ✓ Start discussion forums
- ✓ Manage both documents and users, easily, through interactive forms

Furthermore, CIRCABC

- ✓ Ensures advanced access control: the members of a collaborative group can see only what they are allowed to
- ✓ Provides authentication mechanisms
- ✓ Enables audit trail facilities
- ✓ Offers decentralised and easy management of the individual workspace
- ✓ Allows surveys to be created and managed through the integration of CIRCABC with IPM (Interactive Policy-Making at http://ec.europa.eu/yourvoice/ipm/)

CIRCABC has been developed under programme IDABC[1] . It is based on Open Source Software [2]. It is distributed at no licensing cost under the EUPL V. 1[3] (European Union Public Licence).

Whom is CIRCABC intended for?

CIRCABC is available free-of-charge for:

- ✓ Public Administrations
- ✓ Businesses

[1] The IDABC programme is presented at http://ec.europa.eu/idabc/
[2] Further information on OSS is available at http://ec.europa.eu/idabc/en/document/2627/5894
[3] The EUPL V.1 is explained at http://ec.europa.eu/idabc/eupl

- ✓ Citizens

Can you speak CIRCABC?

CIRCABC calls an **Interest Group** (IG) the *private workspace* designed for and shared by a *community* of users, which means people working together in order to reach a common goal. Several Interest Groups and related information are gathered into **categories**.

An Interest Group may be entirely or partly public (no authentication required) or with registered access (access reserved for its members).

An Interest Group is characterised by:

- ✓ A group of users (potentially unlimited);
- ✓ A set of services (see below);
- ✓ 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 access rights depending on the **user access profile** the leader has assigned to them.

A set of services

Library: the library can be described as a tree of folders (so-called 'spaces') filled with content. This is the place where the documents are stored, managed and shared. They 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 registered users (who can apply for membership in any Interest Group). The members of an Interest Group can ask for their contact information to be hidden from or shown to the other members.
Newsgroups: these groups provide forums where the members of an Interest Group can discuss a topic or the documents they are sharing.
Meeting spaces: a meeting space is made available for announcements and agendas. It includes a chat room to host virtual meetings.
Information pages: web pages enable users to present data in an attractive format. They can include a short presentation of the Interest Group as well as contacts for information.
Surveys: optionally, users can build and follow up surveys through the integration of CIRCABC with IPM (Interactive Policy-Making).

A collection of contents

The contents are grouped into **spaces** and/or **sub-spaces**. The so-called spaces are simply folders.

Coming into CIRCABC

Requirement

CIRCABC is a web-based application, so, obviously, you need an **internet connection**. You also need a **browser** (Internet Explorer 5 or higher, Mozilla Firefox…).
You must use a **valid and unique e-mail address.**
And you should know at least the **URL of your CIRCABC application**.

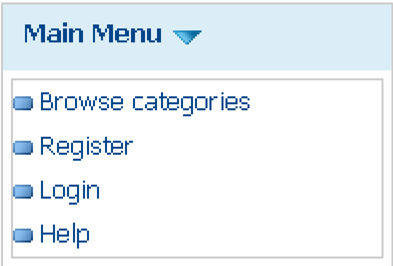
About the access systems

Circa users are spread into **two domains** according to the way they access CIRCABC:

- ✓ **The Commission's civil servants and external staff working "intra muros"** are not requested for any initial registration to CIRCABC. They directly log into CIRCABC and apply for membership in any Interest Group (IG). Moreover, they benefit of the **single sign on**. That allows them to authenticate only once through the European Commission's Authentication Service (ECAS).

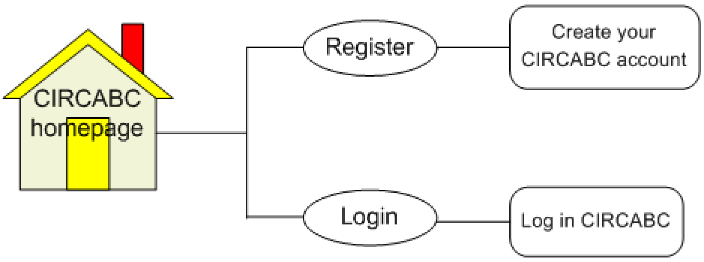
- ✓ The **external users** access through the **CIRCABC** own authentication system.

First-time user: should I register?



Why both "Register" and "Login"?

Register means to get a CIRCABC account, that is to say a username and password. You will register only once. Once you have got an account, you can log in via "Login" and ask for membership in one or several Interest Groups. Later, clicking on "Login" will become your usual way to get into CIRCABC.



Register or login?

Is the access to CIRCABC public?

Although working in a private workspace, certain interest groups enable public access to some of their documents. So these are accessible to every user, whether or not authenticated. The other documents can be read only by authenticated users.

You get in CIRCABC…

Via public access:

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

- ✓ Not all the Interest Groups have documents available this way: you can only access the contents which have been granted public accessibility.
- ✓ You can only read the documents.
- ✓ You cannot participate in the life of any Interest Group.

If wishing to collaborate more closely in an Interest Group, you are warmly advised to **register**.

Via authenticated access:

Before joining any Interest Group, you may be granted very limited access rights by the Interest Group Leader.

The registered users, however, may submit applications for membership in an Interest Group.

Getting a CIRCABC account

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

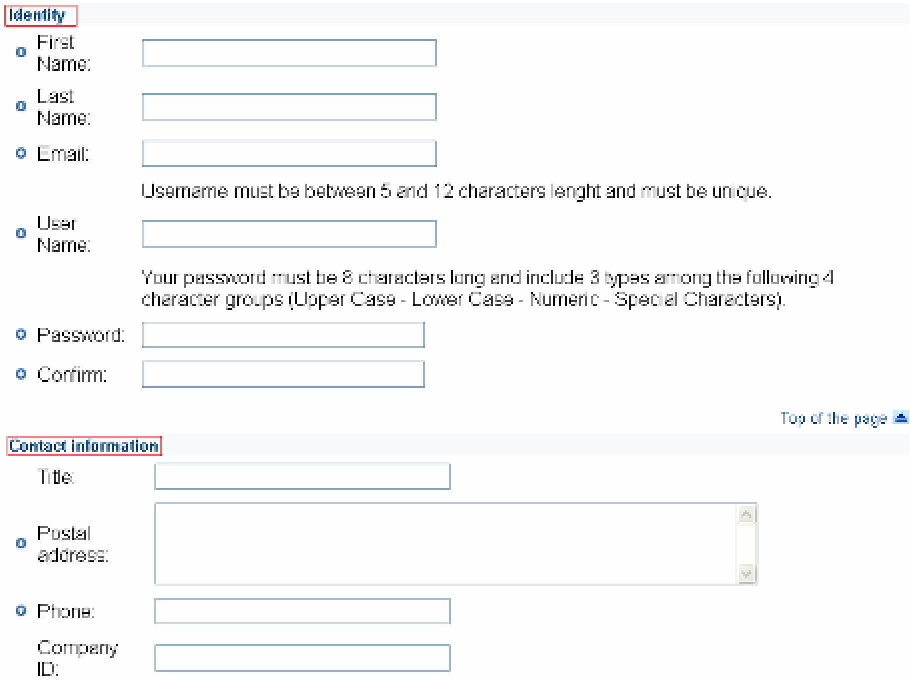
Register procedure

You can obtain your own CIRCABC account by following the "Register" procedure.

You click **register** from the CIRCABC main menu (see left column of the homepage).

This takes you to a registration form which consists of the following areas:

- ✓ Identity (personal data and information required to let you be identified as a CIRCABC user);
- ✓ Contact information (this will help to keep in touch with your Interest Group's fellow members);
- ✓ User options (this allows you to read the user interface and the contents in your favourite language);
- ✓ Verify your registration (information needed for checking purpose).



The registration form: areas "Identity" and "Contact information"

All of the fields marked with symbol "star" (⚙) are **`mandatory`.**

The e-mail address field must contain only one e-mail address.

You create your own password and user name.
Your user name must be unique. It will be more than 7 characters long.
Your password must contain 8 characters or more chosen from at least three types of characters in the four following:

- ✓ upper case (A to Z);
- ✓ lower case (a to z);
- ✓ numeric (0 to 9);
- ✓ special characters (namely, !"#$%&'()*+?-./:;<=>?@[\]^_`{|}~).

For instance, we choose "pa88worD" as a password.

What does the "Verify your registration" area mean?

The registration form: area "Verify your registration"

This CAPCHA test verifies that the current register has not been issued by a robot programmed for running bulk registrations. An equivalent audio message is played for blind and visually-impaired users.

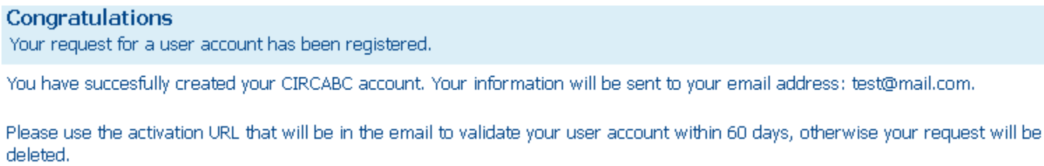
Some more about visibility of your personal information

If you wish to be easily contacted by the other members of the Interest Group and let them know more about your domains of excellence, for instance, you will choose to authorize everybody in the IG to see your user information.
If not, you will deny such authorization. Only the Interest Group leader, category administrator and CIRCABC administrator will be able to access your whole user information. All the other members of the Interest Group will see only your user name, first and last name.

Register

If you have filled out all the mandatory fields, if your password complies with the password rules and if… you are not a robot, you have just to **confirm your request for an account** by pressing on the "**Register"** button.

Your request for registration has been recorded and processed. The message below is displayed:



Congratulations! Your request for a user account has been registered.

If you ever get an error message ("password does not match", "e-mail missing", etc)… just correct and validate again through the "Register" button.

How and when do I receive my CIRCABC account?

Once you have filled out and submitted the registration form, you receive an e-mail with a hyperlink towards CIRCABC.

```
Thanks Claudine Gribouillis for having signed-up for CIRCABC. Please find
below your personal user name and activation link that will let you access
CIRCABC:

User Name : griboucla
Activation Link:
http://wlsdev3.cc.cec.eu.int:8111/circabc/faces/jsp/extension/activation.js
p?user=griboucla&akey=4c13a4ec-9127-11dc-9a3d-133171f7b6da

Warning: You must login to the CIRCABC service within 60 day(s), or your
account will be DELETED.
```

You receive an activation link...

How to activate my account?

You follow the activation hyperlink. It takes you to the "Login" page. You type in the **user name** and **password** you have created as registering. Your account is activated.

If not yet activated after 60 days, your CIRCABC account will be removed.

What if I have forgotten my user name?

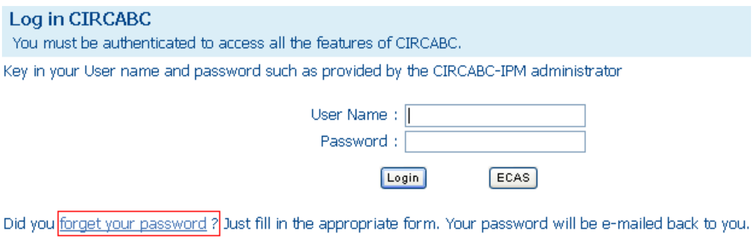
Go back to the activation e-mail you have received from the IG leader. Now if you have also lost this e-mail…

Had you already activated your account? You will then contact the IG leader.

If you had not yet passed through the activation step, try the CIRCABC contact (see CIRCABC homepage)…

What if I have forgotten my password?

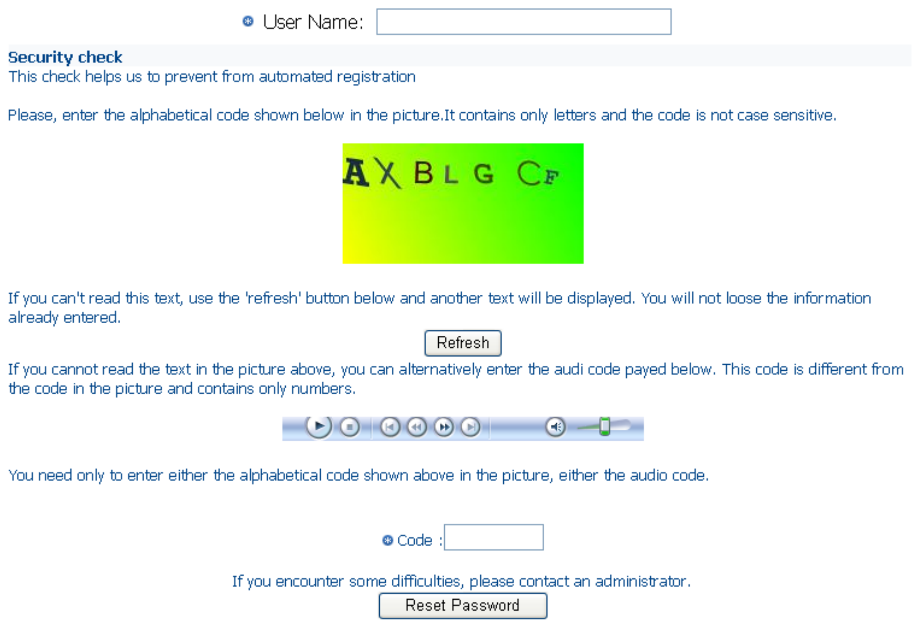
You can reset it by yourself, very easily. You follow the "**forget your password?**" link that can be seen on the Login page.



Did you forget your password?

This takes you to a "**reset password**" page whereon you are requested to:

- ✓ enter your user name;
- ✓ enter either an alphabetical code or its equivalent audio message.



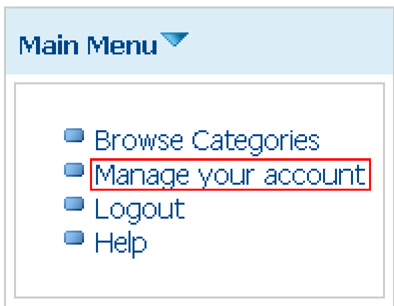
How to reset password

You press onto the "**Reset password**" button, located at the bottom of the page. Your lost password is then e-mailed to you. For security reasons, the e-mail does not contain your user name.

As an alternative, you can contact your IG Leader.

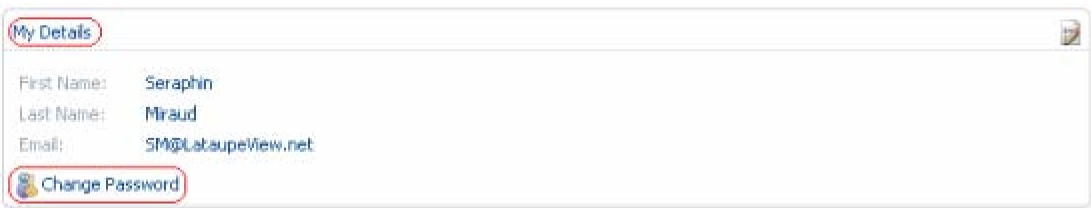
How to change my password?

You can change it only if you are a member of an interest group. You log in your interest group. You select "**Manage your account**" from the CIRCABC main menu so as to be taken to the page "**User options**".



Click here to access "change password"

Once there, you click the link "**Change password**" that can be found at the bottom of the "My Details" section.



How to change password

The dialog "**Change password**" is launched. You are expected to put and confirm a new password. Once done, you click "**Finish**" and your new password is saved.

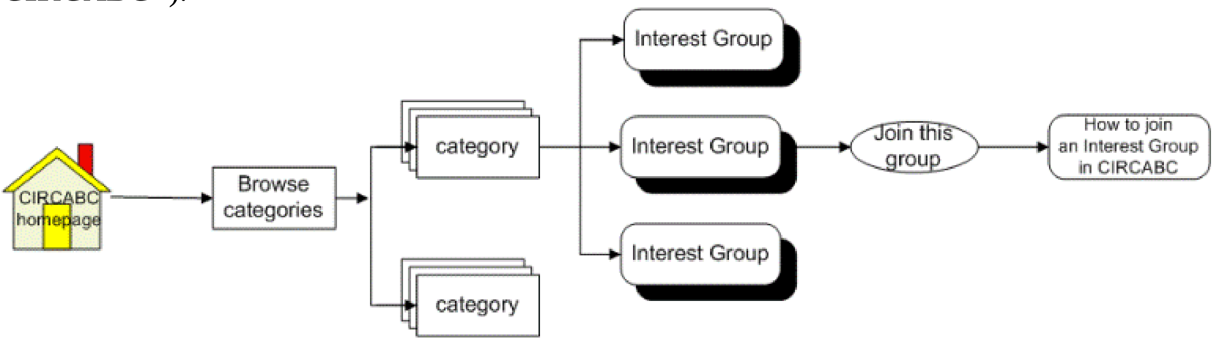
Enter and confirm a new password

You click **Next** which takes you to a summary of your personal information. You press on **Finish**.

Becoming a member of an Interest Group

What is an Interest Group?

The Interest Group has been defined in Can you speak CIRCABC? (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, to be able to exchange views with the other members, so, to be able to collaborate closely with people who are sharing your concerns and projects.

Membership is free-of-charge. A unique user name and password allows you to become a member of several Interest Groups

Your rights to access contents will differ according to the access profile the IG leader will have assigned to you.

Access to an Internet group in five steps

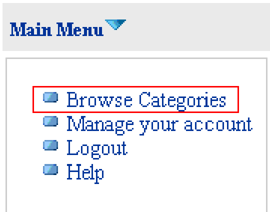
From the authentication step to your Interest Group main page, you pass through 5 steps that are:
Login CIRCABC > Browse categories > Browse category names > Select a category > Select an Interest Group

The below screenshots describe the successive steps from the authentication 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:

- ✓ 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:

- Having missed a step, I have pressed the BACK button in the browser toolbar. Why did this result in an error?
- **The BACK function is not supported by CIRCABC**. It is recommended to navigate through the CIRCABC menu and navigation bar

Apply for membership

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

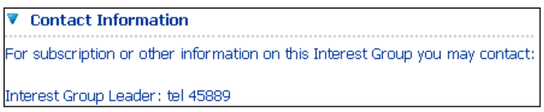
- ✓ **Members**: shows the Interest Groups for which you have **Membership**. This does not appear if you are not a member of any IG.
- ✓ **Registered access**: lists Interest Groups of which you may **become a Member** and which are visible for authenticated users, only. This does not appear if you have not registered.
- ✓ **Public access**: lists the Interest Groups which are accessible to everybody irrespective of authentication. This is displayed in any case.

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 its welcome page displays both the "**contact information**" pane and "**Apply for membership**" form.
Now, if you click "**Join this group**" without being authenticated, you are just led to the "**Contact information**" pane.

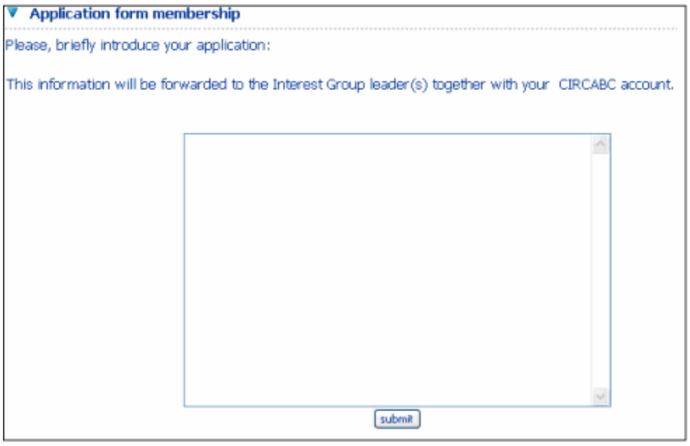
The "**Apply for membership**" page is split in two areas:

- ✓ The first one informs you about how to contact the IG leader:



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**. The application reacts by displaying the following message:
"Your application to the Interest Group has been taken into account. A mail is forwarded to the Interest Group Leader(s)".

Confirmation message

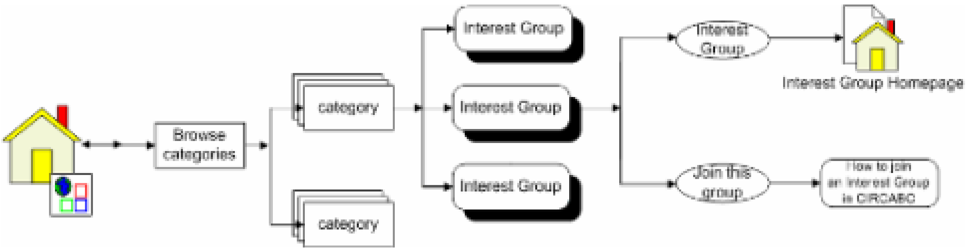
You are now a member of an Interest Group. You are ready to participate in the life of your Interest Group.

First steps towards an Interest Group

The previous section has introduced the basics for accessing CIRCABC. You have now registered (if not an ECAS user) so that you have a CIRCABC user name and password. You have then asked for becoming a member of an Interest Group.
Now let us go on and discover our Interest Group.

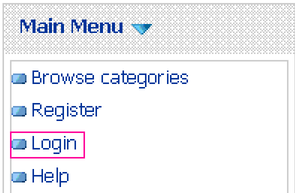
First-time access

This figure shows how to navigate from the CIRCABC homepage to an Interest Group for which you have membership.



Navigate and come in your IG

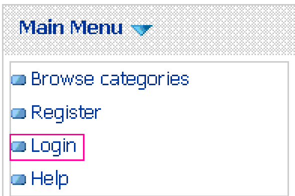
You click "**Login**" in the main menu of the CIRCABC homepage and type in your user-name and password.



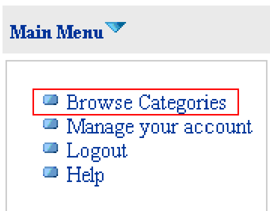
Click Login and authenticate

The paragraph below guides you from the authentication step toward an interest group (titled "Animal welfare").

First you click Login (in the CIRCABC main menu):



Later, you browse the categories:



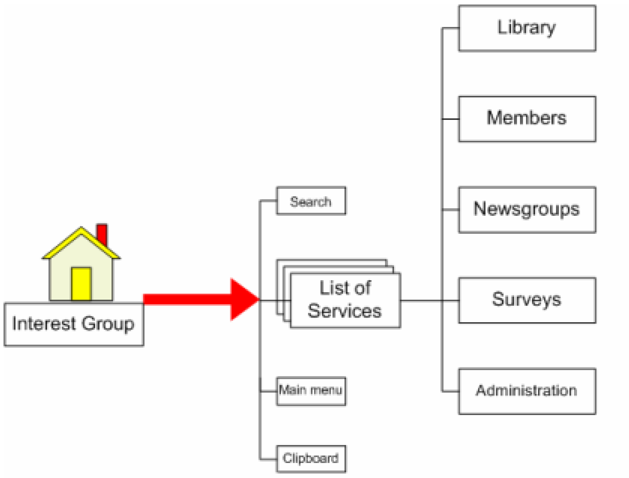
You choose a category header ("Others", in this example)...

... and then a category of interest groups ("Wild Life Observatory", here):

Finally you access the interest group you are looking for ("Animal welfare"):

Keep in mind that an Interest Group is characterized by a **group of users** (potentially unlimited), a set of **services** (Library service, News, etc) and a collection of **contents** based on a same theme.

You can now take a first glance at your Interest Group. Its structure is figured below:



The services offered by your IG

Your Interest Group is made of a number of services:
Library: this is the main service of your Interest Group. It receives your documentary content.
Members: this lists the members of your Interest Group.
Newsgroups: this service enables to create or simply take part into discussions.
Surveys: this enables to participate in surveys published by IPM ("Interactive Policy Making"). This will come with a further release.
Administration: this provides features for administrating the Interest Group.

Your access to each service, as well as the actions you can perform, depend on the permissions you have received 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).

For whom is the Library intended?

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 associated with the Library are:
> **No access**: the access to the Library is denied.
> **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 read and write on the whole Library; 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.

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.

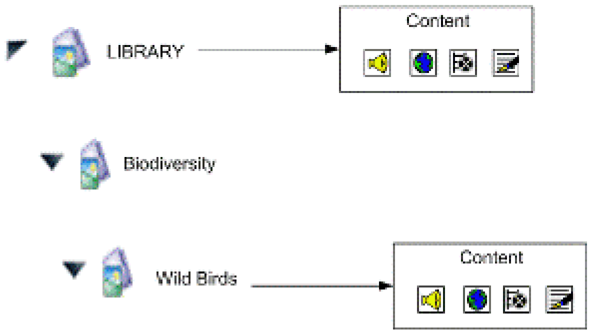
What does it look like?

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".

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/or content.

Each **content item** can be delineated 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 role in the Interest Group:
Visit the Library through the ACCESS role (page 21)
Visit the Library through the EDIT ONLY role (page 22)
Visit the Library through the MANAGE OWN role (page 27)
Visit the Library through the FULL EDIT role (page 29)
Visit the Library through the ADMINISTRATE role (page 29)

If you are the interest group Leader, please, read also the Interest Group Leaders guide.

Whatever access rights you have been granted, you are assumed to meet the following pre-requisites:
You are registered so that you have a user-name and password.
You have been invited to participate in at least one Interest Group.
You have typed in the URL of your CIRCABC application; you have logged in; you have accessed the relevant Interest Group.

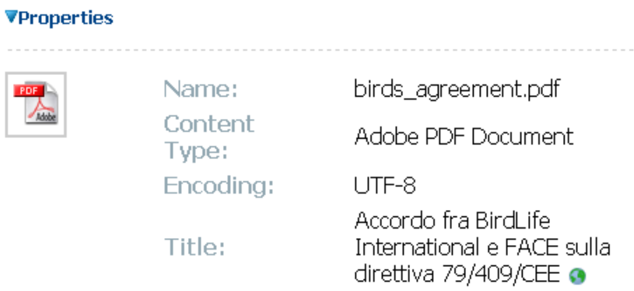
Visit the Library with the ACCESS role

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 doing so, you display the content properties.

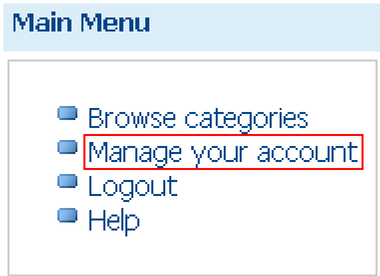
How can I read a multilingual document in my favourite language?
You will find further explanation in selecting a language for the display of contents (See p 31 "**Setting your language preferences**").

How can I download content?
You can download a content by clicking its **file format icon**. This can be found besides the content properties, on the "View details" page as illustrated below:



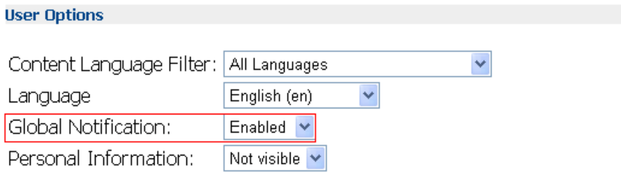
To download content, click the file format icon

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, pick "**Manage your account**" from the CIRCABC main menu.



To enable notifications, click this option…

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



and choose "enabled"

Once done, press on "**Save**" (at the top-right corner of the CIRCABC account management page).
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…

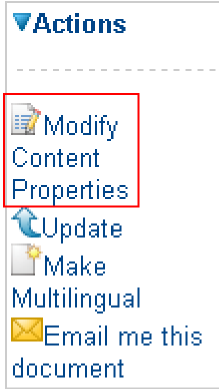
Visit the Library with the EDIT ONLY role

- ✓ You can read and modify any content.
- ✓ 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).

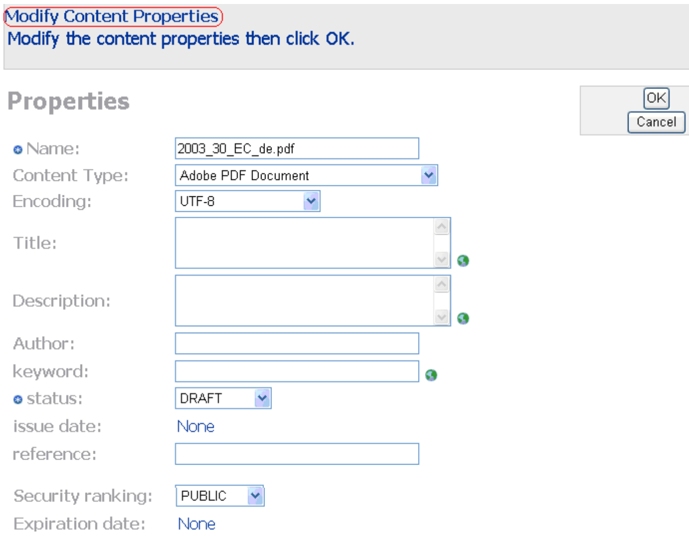
How to modify the content properties

You select a content item from the Library "browse" page.
You click the **View details** ( ) icon located next to the item name. In so doing, you display the properties of the content as well as the list of the actions you can perform over this document.
You select "**Modify Content Properties**" from this actions list.



Select "modify Content properties"

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



Modify Content Properties

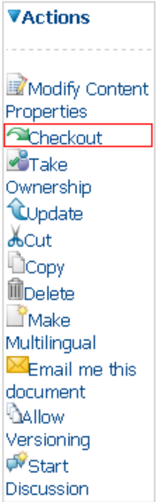
You key in the changes you need and press on the **OK** button to validate your action: your changes are saved and you are taken back to the details of the document. Click "**Close**" on this page to come back to the main page of the Library.

Check out any 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, so that nobody else can modify the concerned content before you unlock it by yourself. You save the working copy, locally. You make all the changes you wish in the replicated content. Once done, you "**check in**".

Where can I run "Check out" from?

"**Check out**" is available from the "Actions" list of the "View details" page of the content to be modified.



"Check out" in the "View details" page

How to check out?

You have selected "check out"; a working copy is created either in the current space or in any space of your choice. This copy looks like any content with its properties, its information content and a set of potential actions.
You are proposed to edit the working copy to your own system so that you can add changes at your convenience. You can also decide to edit later.
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 ( ) next to the content name. For instance,

IP-07-498_ES.doc

Every other IG member only see the "locked" ( ) icon. So,

IP-07-498_ES.doc

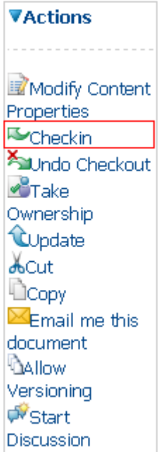
After having captured all the modifications you need into your locally stored replication of the working copy, you will be ready to check in. At this stage, the other IG members cannot work on the content you have modified.

What if I change my mind and wish not any longer to modify my document? - While you will not have checked in, you will be given a possibility to give up the "check out" action. To do so, you display the "View details" page of the Working copy and select "Undo check out" (Undo Check Out) from the Actions list. The working copy is deleted.

How to check in?

To upload the modified document and unlock the content, you **check in** the working copy.

To so doing, just click the "check in" icon ( ).
This is located in the **Actions list of the Working copy "View details" page**:



"Check in" in the "View details" page

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 **automatically unlocked**.

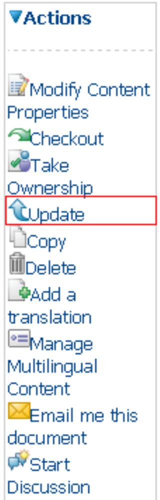
Update a document

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

Wherefrom can I start the Update action?

Let us go on with the above example. Let us imagine that we have to load a new version of the document titled "Birds agreement". We click the "Update" icon ( ) from the "content item" short description as shown in the "content items" area of the Library "Browse" page.

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



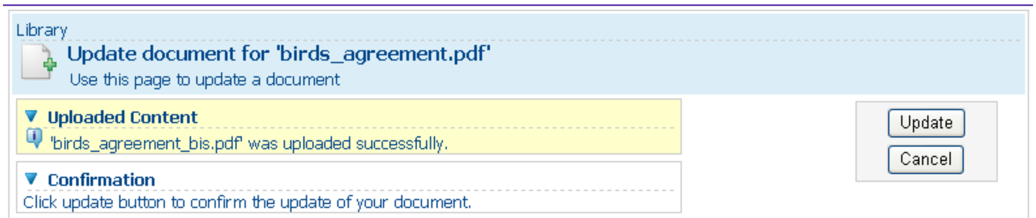
Select "Update" from the "View details" page

How can I load a new version of a content?

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

Update a content with new information

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**.



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.

Notice 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 the contributor may perform over the contents…

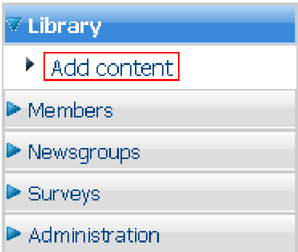
Visit the Library with the MANAGE OWN role

- ✓ You have been invited to increase the Library with new contents. So you are allowed to add contents.
- ✓ Since you might have to modify the contents you add, you can edit your own contents. But you cannot edit contents created by other members.
- ✓ 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 the header "Library", from your interest group services list. To add content to a sub-space of the Library, display this sub-space and use the "Add content" function you can see in its title bar.



Take a look at the Library title bar

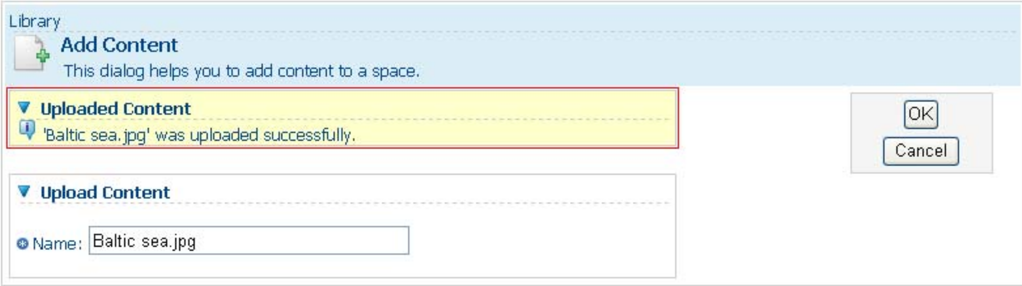
How can I add content?

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 pages:

- ✓ Inform you about **the state of the uploading**; for instance:

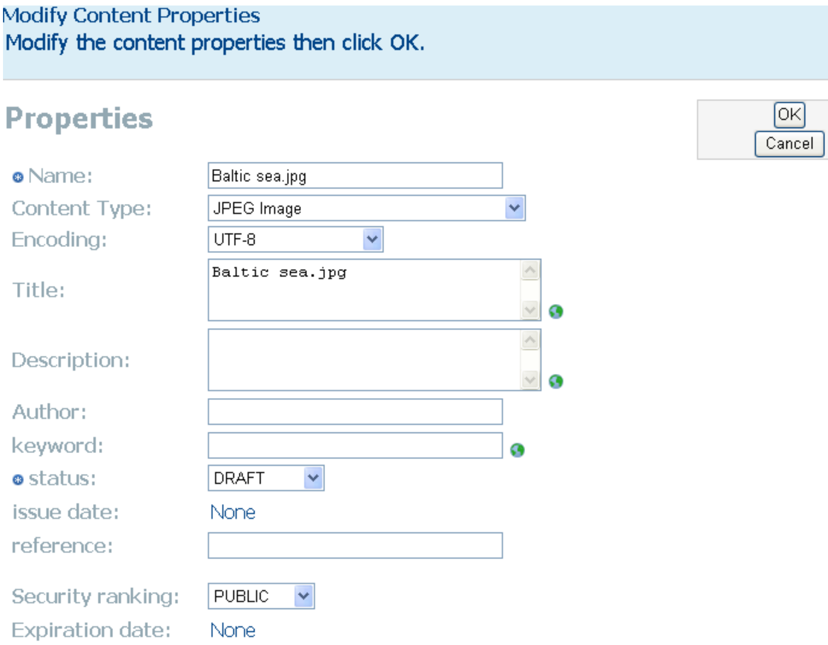


At this stage, you can still correct the file name if this contains forbidden characters.

- But… I really do not know which characters are forbidden! - These are: **" * \ > < ? / : |**

✓ **List the properties** of the new content and allow you to **modify them**.

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, simply click **CANCEL.** Notice that **the Name and Status fields are mandatory**.

The Library main page is displayed back with the just-added content listed among the "Content items".

- 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 32).

Delete contents

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

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

Visit the Library through the FULL-EDIT role

This is the typical role an author may be assigned. 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 or create content

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

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*").

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*").

Visit the Library through the ADMINISTRATE role

Please, refer to the Interest Group Leaders Guide 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*") 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 can manage 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 your Library's content.

In this chapter, you will learn how to deal with the multilingual features of both your User Interface and your Library's content.
We shall see:
- How to change the language of your user interface;
- How to set your own linguistic preferences;
- How to make content multilingual;
- How to display the various linguistic versions of a content;
- How to deal with the translations of a content.

What are the criteria for a language to be taken into account in CIRCABC?

At the User Interface level

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 "codes for the representation of names of languages"--Part 1: Alpha 2 codes (ISO 639-1, alpha-2).

At the content level

CIRCABC deals with 165 languages, defined and listed in ISO 639-1, alpha-2.
These languages are ordered as follows:
- ✓ The official languages of the European Union appear at the top of the languages list;
- ✓ The official languages of the candidate countries come in a second position;
- ✓ They are followed by all other languages defined in the ISO 639-1 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.

Two linguistic preferences

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

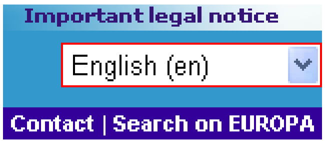
Registering gives you an opportunity to save your favourite User Interface language. But any user, whether or not authenticated, can change the user interface language, temporarily:

- ✓ The language of the user interface is one of the "**User options**" you are proposed to select and save as filling out the **registration form**. Whenever you authenticate, the CIRCABC User Interface is displayed in the language you have saved as a user option.

Registration form: save your favourite User interface language

Your choice, therefore, is not definitely fixed:

- ✓ As any user, whether or not authenticated, you can change the User Interface at any time and from any CIRCABC page. To do so, you use the language menu presented at the top-right corner of screen.



Change the language of the User interface, temporarily

In the above example, we have selected "English". This means that all the menus and pages of your User interface will be worded in English. You can change again the User Interface language at any time.

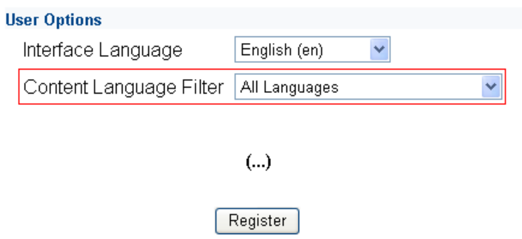
- ✓ The language of the user interface can also be changed through the "language" field of the "User options" section in the "Manage your account" page (accessible via the CIRCABC main menu).

Selecting a language for the display of contents

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

Only authenticated users may apply a "Content Language Filter".

- ✓ You can save your linguistic choice while registering. To do so, you select a **Content Language Filter** from the "**User options**" section of the registration form. The multilingual contents are then displayed in the selected language whenever you have authenticated and this, until you select another **Content Language Filter**.



Saving a Content Language Filter as registering

- I have no linguistic preference. I do not wish, therefore, to read the multilingual contents in any specific language. Is it possible?
- Yes, you will simply pick "**All languages**" out of the list attached to field "Content Language Filter":

No "Content language filter" is applied

This lets you see every linguistic version of a same multilingual content. Moreover, "all languages" is the default filter applied in the registration form.

✓ To change the Content Language Filter, you must be authenticated. So, once you have logged in, choose "**Manage your account**" from the **CIRCABC main 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 applied to a group of translations (see "**Displaying translations**"; "*Displaying translations only in your favourite language*").

Dealing with multilingual documents

First, let us learn how to make multilingual any document.

Making multilingual

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

"Making multilingual"… What do you do?

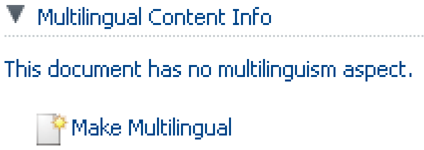
You associate a number of translations to a same original content in a manner which allows you to navigate easily from any translation to the original content and reversely. Every element of your so-obtained multilingual document shares characteristics (so-called multilingual information) further to their own properties.
This action can be applied to the contents in your Library or in any of its sub-spaces.

Who can make multilingual a document?

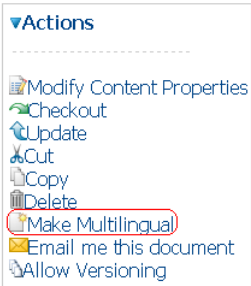
Any Interest Group member who can create a document in the library can make it multilingual.

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.

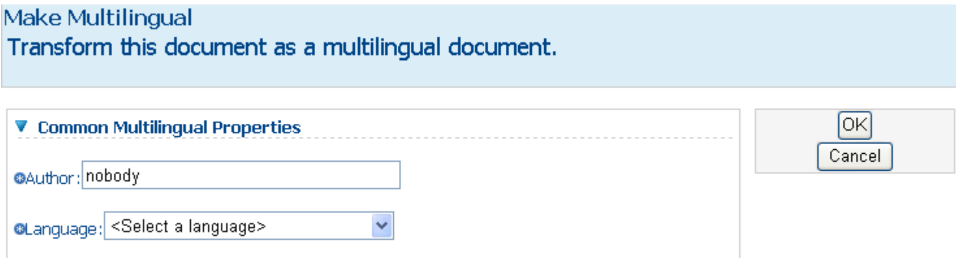


Make multilingual via the Multilingual content info pane



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.

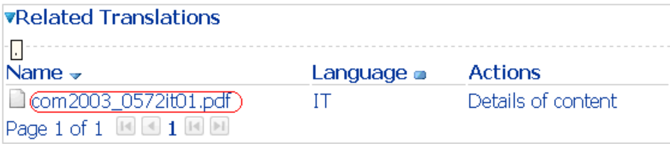
Once you have mentioned the language of the document, you can **click OK**. In so doing, you are taken back to the content "Details" page.

Now, the "**Multilingual Content Info"** shows information relating to the original document and shared by all the translations that will be added later.

View of the "Multilingual content info"

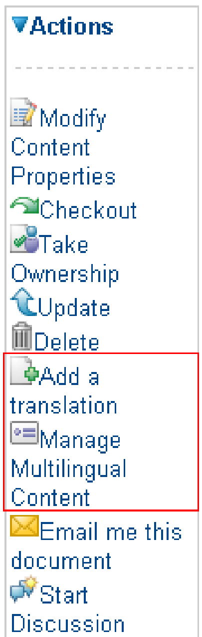
The version number applies to the whole multilingual document (to be discussed further).

A new area is appeared below 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).



Further to making a document multilingual, "Make multilingual" is removed from the "Actions" list of the "View details" page whereas new actions become possible. These are:

- ✓ Add a translation
- ✓ Manage multilingual content



Other actions appear in place of "Make multilingual"

Adding translations

This process goes through two actions:

- ✓ You will upload a file in the same way as you add content;
- ✓ The concerned multilingual document will be updated with the translation. So relations will be built between the translation, the original document and the other existing translations.

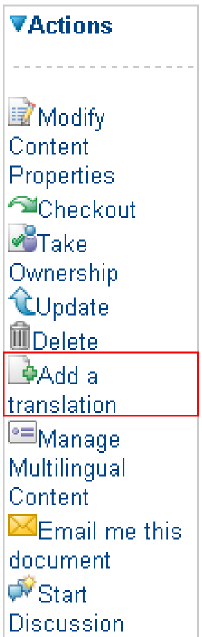
How can I add translations?

CIRCABC allows you to start the "Add translation" process from three possible starting points:

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

From the "View details" page of any multilingual document

"Add translation" may be run from the "Actions" pane 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"

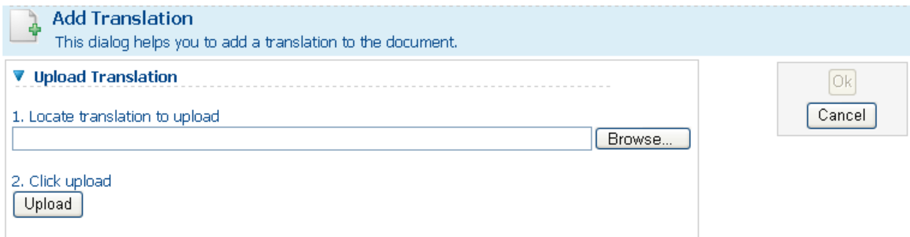
From any other translation of the original document

You can increase a series of translations starting from any related translation since each of these is a multilingual document.

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").

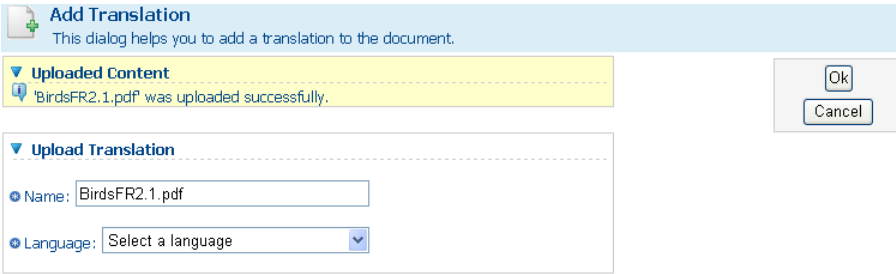
Run **Add translation** from any of the above-listed locations. As a result, the first screen of the "Add translation" form is displayed, requesting you for providing the file to be uploaded.



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

You **select** the translation file to be added and confirm your decision by pressing on the **"Upload"** button. This leads you to the second step of the "Add translation" process which consists of detailing the properties of the translation you are adding.

A bar at the top of this second screen informs you about the success (or failure) of the upload. You can change the name of the translation. You are requested for indicating the language of the uploaded content.



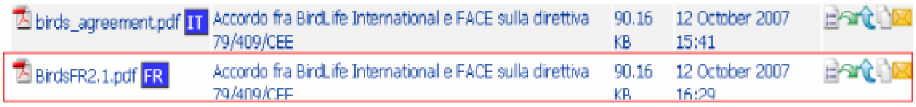
How to add a translation with content... Last step

The symbol ("required field") next to "Name" and "Language" indicates that both these fields are **mandatory**.

You are requested for **detailing the language of the translation**.
As soon as selected, each language is taken out of the list. **The reason why is that you may not add more than one of each linguistic version.**

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 appears as a new content:



A new translation has been added

Please, notice 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 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 the related space.

The details page shows the following areas:

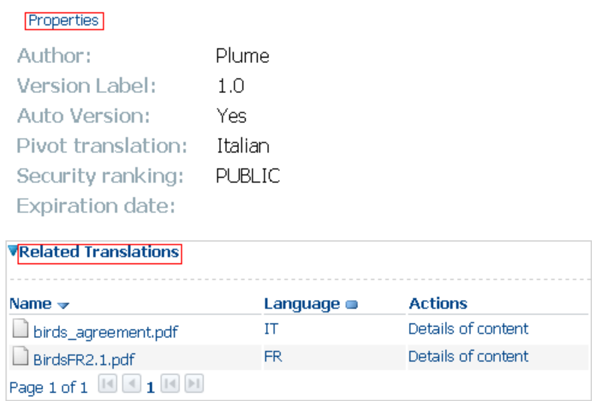
- ✓ Properties
- ✓ Multilingual information
- ✓ Related translations
- ✓ Version History
- ✓ Actions

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.

Most properties of the just-added translation

The "Multilingual content information" includes:

- ✓ properties shared by all the translations;
- ✓ a reference list of the translations;



Displaying "Multilingual content info"

The properties listed in "Multilingual Content Information" 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

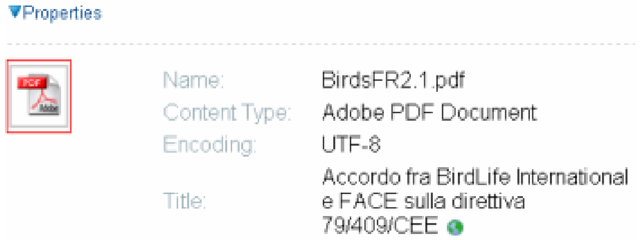
You can reach the full text of translations starting from various locations.

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

Download translation from "related translations"

Through "Manage multilingual content"

You can display the "Manage multilingual content" page by selecting 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. To do so, just click the link of your choice:

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

Translations

Name	Language	Actions
BirdsFR2.1.pdf	FR	View

Displaying a translation through "Manage multilingual content"

Displaying translations only in your favourite language

As previously explained (see "selecting a language for the display of contents"), you can select a language for displaying the translations. Remember that, by-default, CIRCABC displays all the linguistic versions of a group of translations ("all languages" is the default content language filter).
Each translation comes along with its own linguistic code:

Content

Name	Title	Size	Modified	Actions
c_16820070720bg00340037.pdf BG	c_16820070720bg00340037.pdf	112.17 KB	10 October 2007 10:07	
c_16820070720hu00340037.pdf HU	c_16820070720hu00340037.pdf	95.15 KB	10 October 2007 10:10	
enzymes_ESC opinion.pdf EN	c_16820070720en00340037.pdf	79.48 KB	10 October 2007 09:14	

Displaying translations with default "all languages" setting

Now, we prefer to read our multilingual documents in Hungarian, only. We pick "Hungarian" out of the list of the Content Language Filters (accessible through the option "manage your account" of the CIRCABC "main menu"). Once done, we display the multilingual document again:

Content

Name	Title	Size	Modified	Actions
c_16820070720hu00340037.pdf	c_16820070720hu00340037.pdf	95.15 KB	10 October 2007 10:10	

Hungarian is the Content language filter

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

What about every other related translation? You still can access them

- ✓ from the "Related translations" area of the "Multilingual content info" pane of 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 (refer to "**How to deal with the Library**"; "*for whom is the library intended?*") can modify translations.

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 as 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 to two different linguistic versions. The language of the current translation, however, keeps appearing.

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:

Name	Language
c_16820070720bg00340037.pdf	BG
c_16820070720hu00340037.pdf	HU

Related translations before changing language in the translation properties

Name	Language
c_16820070720bg00340037.pdf	BG
c_16820070720hu00340037.pdf	FI

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 Update a document (see **Visit the Library with the Edit only role**; *Update a document*) for more details.

Checking out a translation

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

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*), the **version number** that you can read among the translation properties is incremented.

Name:	BirdsFR2.1.pdf
Content Type:	Adobe PDF Document
Encoding:	UTF-8
Title:	Accordo fra BirdLife International e FACE sulla direttiva 79/409/CEE
Description:	by
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 as you do with any monolingual content, just by clicking the Delete icon ( ) in the Actions list of the translation "Details" page (accessible through icon).
The pivot translation, however, does not show any "Delete" icon. Please, keep in mind that you cannot delete the pivot translation as long as it has translations based on it.
So if you have to clear the content on which the other translations are based, you should first of all select another translation as the new pivot translation.

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 at least a 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" list available from the content "details" page (accessible through icon).

Manage the information about a group of translations

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

- ✓ The properties of the multilingual content (such information is shared by all the translations of the original content);
- ✓ The list of the translations of the original content;
- ✓ The edition history (history of the successive versions of the whole group of translations);
- ✓ An actions list.

Manage multilingual content

Modifying the properties of the multilingual content

Do not forget that changing 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" (that is to say the translation every other translations are based on).

CIRCABC allows you to change it under the following condition:
You must choose the new source-language between the languages of the translations that are listed in the "Translations" pane of "Manage Multilingual Content" (see illustration above).

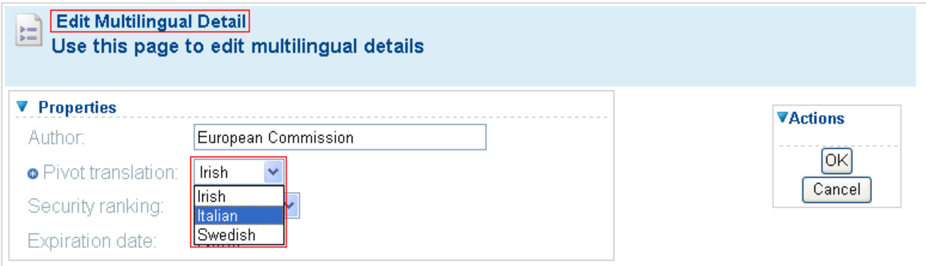
In our example, Irish is the language of the pivot translation. Both the Italian and Bulgarian texts, added later, are based on it. For some reason, we consider that the translations added from now and onwards should be based on the Italian version. We choose Italian as the new "pivot translation".

First, 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 languages list attached to the field "Pivot Translation": the languages there match the linguistic 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 language field of 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 a translation on which all the other items of a group of translations are based. The multilingual properties of the document are based on its details.

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 grouped in the current edition is chosen as pivot translation of the new edition (you may chose the same pivot translation if you need so). The other translations grouped in the current edition will not be available any more from the new edition.

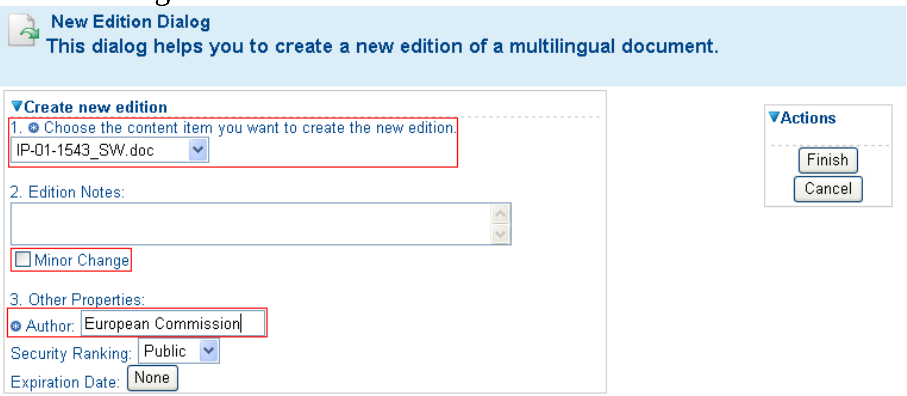
How to do

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

First edition

The current edition gathers three translations of a same document (initially titled "Biofuels in transport; IP-01-1543"). These are Irish, Italian and Swedish.
For some reason, we need to create a new group of translations based on one of the existing linguistic versions. The translations we shall add later will have to be based on 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 look for and 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, that is to say the content on which the new group of translations will be based. This must be chosen among the translations existing in Edition1.0.

You indicate how much change next edition will bring to its predecessor: 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.

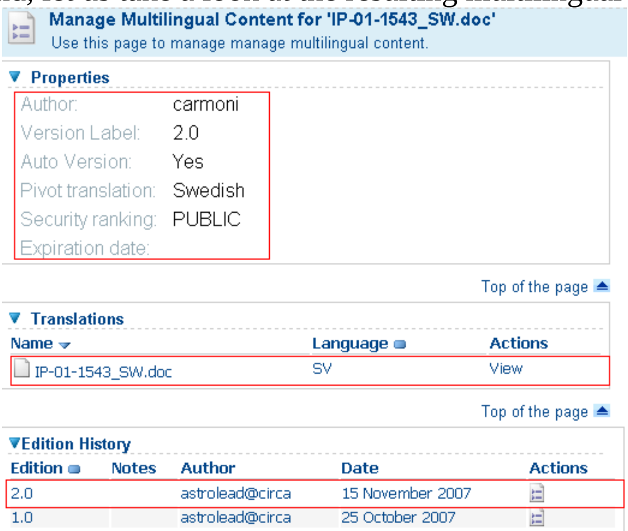
If the changes are important enough to justify the creation of a totally new edition, you do not check "minor change". In so doing, you obtain Edition 2.0 from Edition 1.0.

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

Both "Author" and the basis for the other translations are mandatory data: they are marked with the "required field" 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 one which will serve as a basis for later-added translations). The translations grouped in Edition 1.0 are not available from Edition 2.0.
The multilingual properties are those 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

The below example consists of copying a multilingual document of which we have made two editions. The new edition contains three translations (respectively in Swedish, German and Dutch). The German and Dutch translations are based on the document in Swedish.
We copy the all three translations from the Library root into a Library sub-space.

Multilingual content of the document we are about to copy

Specificities

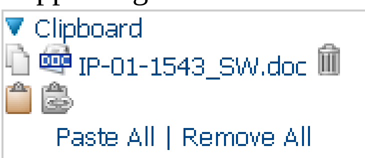
The whole group of translations is copied at a time. If you had made a new edition, however, remember that the current edition only is taken into account. This will be detailed below.

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. To paste all collected items navigate to the desired space then from the menu under 'More Actions' select 'Paste all'."

The clipboard is displayed in the browsing 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. It should be noticed, at this stage of the copy process, that none of the other translations of the group are appearing there.



Once you have navigated to the desired Library sub-space, you press onto the "paste" icon ( ). Taking a look at the main page of the target sub-space, you can notice that all the three translations of the group have been copied.

Content

Name	Title	Size	Modified	Actions
Circa leaflet.pdf	Circa leaflet.pdf	169.57 KB	30 October 2007 11:56	
Iceland_MER_ES.jpg ES	Iceland vista del cielo	31.94 KB	6 November 2007 14:00	
IP-01-1543_DE.doc DE		37.5 KB	15 November 2007 10:27	
IP-01-1543_NL.doc NL		36.5 KB	15 November 2007 10:27	
IP-01-1543_SW.doc SV	Biofuels in transport- SW	36.5 KB	15 November 2007 10:27	
Space_maritime_policy_EN.doc EN		36.5 KB	5 November 2007 10:04	
space_maritime_policy_FR.pdf FR	Space and sea	80.65 KB	5 November 2007 10:04	

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

Manage Multilingual Content for 'IP-01-1543_SW.doc'
Use this page to manage manage multilingual content.

Properties

Author:	
Version Label:	1.0
Auto Version:	Yes
Pivot translation:	Swedish
Security ranking:	PUBLIC
Expiration date:	

Top of the page

Translations

Name	Language	Actions
IP-01-1543_DE.doc	DE	View
IP-01-1543_NL.doc	NL	View
IP-01-1543_SW.doc	SV	View

Top of the page

Edition History

Edition	Notes	Author	Date	Actions
1.0		astrolead@circa	15 November 2007	

Only the last edition is copied

Delete multilingual content

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

Content

Name	Title	Size	Modified	Actions
Circa leaflet.pdf	Circa leaflet.pdf	169.57 KB	30 October 2007 11:56	
Iceland_MER_ES.jpg ES	Iceland vista del cielo	31.94 KB	6 November 2007 14:00	
IP-01-1543_DE.doc DE		37.5 KB	15 November 2007 10:27	
IP-01-1543_NL.doc NL		36.5 KB	15 November 2007 10:27	
IP-01-1543_SW.doc SV	Biofuels in transport- SW	36.5 KB	15 November 2007 10:27	
Space_maritime_policy_EN.doc EN		36.5 KB	5 November 2007 10:04	
space_maritime_policy_FR.pdf FR	Space and sea	80.65 KB	5 November 2007 10:04	

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).

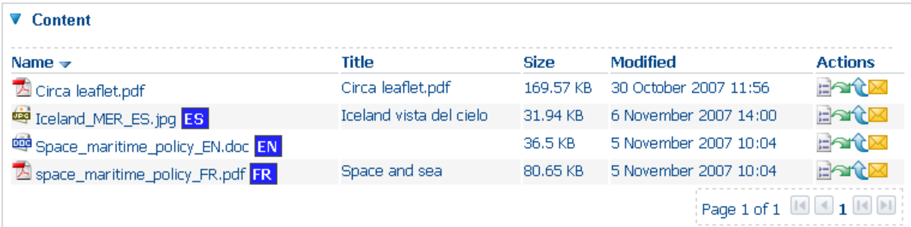
How to do

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 the Interest Group to which you have membership. 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 to other languages.

Lets us go on a few further and create your own 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's 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) of your interest group, 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 where 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 (the Library or any of its subspaces). It is explicitly shown as "link to" and is symbolised with icon "".

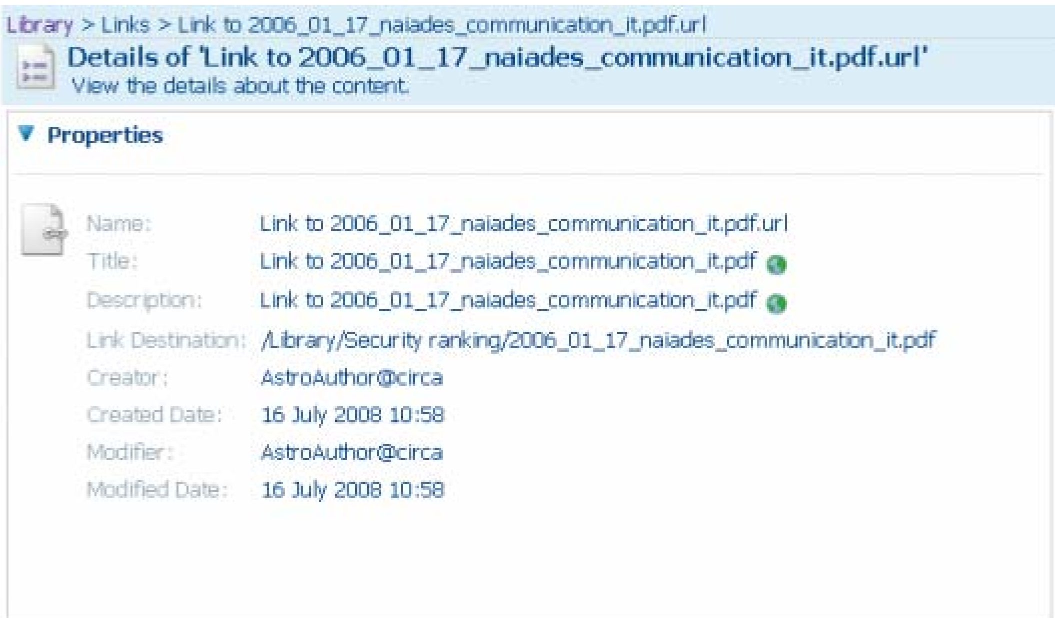
A new link is available from the library

- What about multilingual documents? Can I link to a translation?
- Yes, you can. Please, note however that such links 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 so is given a limited set of properties and actions. We can see in "link destination" its most specific property. This informs you about the location of the linked-to 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-to document, just press the name of the link from the library's main page (or the main page of the space containing 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 regarding links.

Several links can be grouped together thematically. This is what we are to explore now through the creation and management of 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 (or a sub-space in a space of the library). It is usually symbolised by icon "". Its properties are of a space, not of content, and you can only perform on it actions usually applied 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".

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

How to create dossiers?

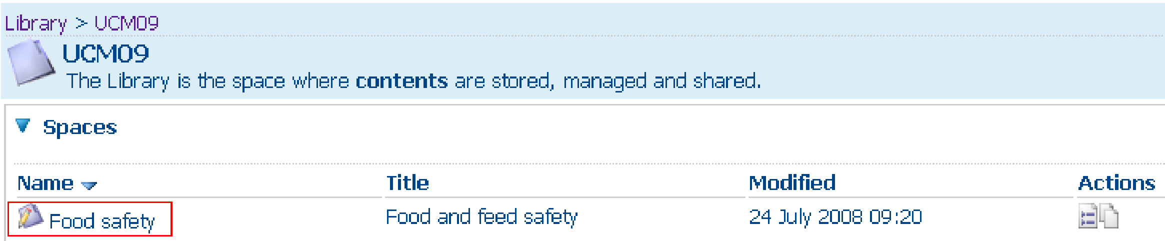
Who may create dossiers?

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

How can I make a dossier?

You connect 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 "" so as to be recognized as a dossier.



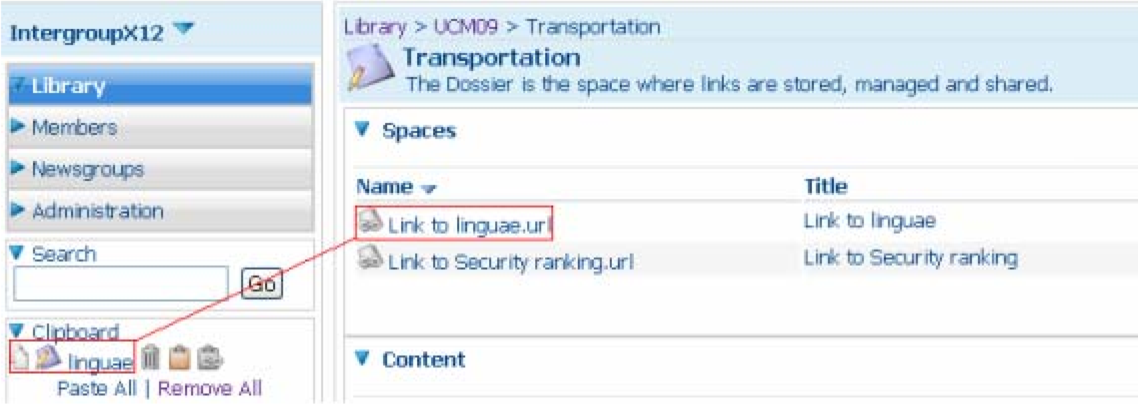
Dossier "Food safety" created in the subspace "UCM09" of the Library

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.
To do so, just select and copy the contents or spaces you wish. Then, you display the dossier main page. Now you paste as links the selected contents and/or spaces. Remember that "**Paste as link**" is symbolised by icon "".

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 same way as you cut/copy any space of the library.

How to deal with searching

Whatever role you may play in the Interest Group, you can build more or less complex requests and find any kind of content or identify other users.

We shall find, in this section, more information about:
- running a quick search for a content
- building a precise request

Extent of the explored content

CIRCABC enables you to retrieve any content, stored in any format.
The search engine explores the **full text** of the contents as well as the files names and titles.
Notice that the "description" field is not read by the engine.
It reads only the last version of contents.

"You seem to tell about textual search. But what about the items which exclusively consist of data other than text?
-No matter, such items are linked to textual metadata (i.e. their name). The search engine explores their name and some properties.

About the general search

The **general search** allows you to ask for text to be retrieved from the name and/or the informational content of any space or content. The general search is run from the search box which can be found in the left column on the Interest Group Welcome page, just below the IG services list. Such location allows you to reach it from anywhere in your Interest Group Library.

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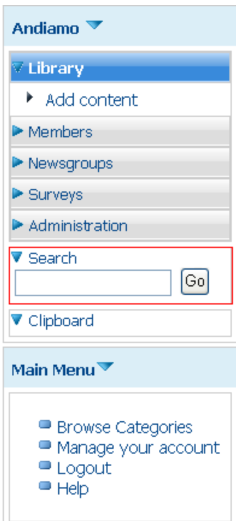


Between services and clipboard, the search box

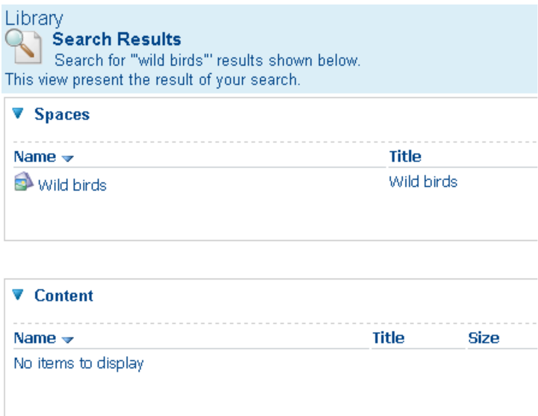
Search syntax

We shall: - Look for words next to each other or words in a same phrase; - Build queries by using Boolean operators; - Combine search terms; -get familiar with advanced search options.

The **general search** explores by default the whole Library. It reads the name and full content of each explored entity (spaces, content, discussions about content, etc)
All of the most frequent syntax combinations are allowed. The engine deals with proximity, makes use of Boolean operators and manages parenthesized expressions.

Proximity
Would you wish to find two or more words next to each other? Just **double-quote the expression** you are looking for.

Let us look for the expression "Wild birds". As can be seen, we double-quote this expression and introduce it into the "General search" box. Our request comes up with one result, a space titled "Wild birds":



Look for "wild birds"

"- But what if we **forget to double-quote** the search term and simply write wild bird? - Nothing serious, indeed! The search engine will understand our search as a request for any space or content including **either or both these words** (as shown below)."

Look for wild birds

Since no double quotes have been detected, the blank between the two words has been understood as "OR", the default Boolean operator.

Boolean operators (OR, AND, NOT)

About Boolean operators:

Please, keep in mind that, **currently, the search engine associated to CIRCABC_IPM only accepts the implicit OR**. The other Boolean operators such as "AND" and "NOT" will probably be implemented later.

"**OR",** because the **default** operator, is **implicit**. Although implicit, it may be written in full, as well. In the following example:
Bat bird
Is correct and is expected to be equivalent to
Bat or bird

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

Bat and bird**

Comes up with documents containing both:
- any word starting with bat
- any word starting with bird

Classically enough, the **NOT** operator excludes from the results set, the documents containing the word it introduces.

Combining Boolean operators

You can build a query by combining Boolean expressions. You will then use parentheses:

For instance:
We are looking for items which contain "sustainable hunting" or both "birds" and "bats":
"sustainable hunting" or (birds and bats)

We are looking for items which contain:
either the words "sustainable " and "hunting
or the word " bird" and any word starting with "bat".
(sustainable and hunting) or (bird and bat)*

Wildcard searching:
The ***** symbol may be used in place of one or more characters, whether those exist or not.

"*****" can only replace the right part of any word; you can put it at any place, but after the first two characters of the word.
This means that the search word **bat*** accounts for words like:

- ✓ bat
- ✓ bats
- ✓ Bates
- ✓ battle
- ✓ etc

What if I search over multilingual documents?
The results are displayed differently according to whether or not you select a content language filter:

The monolingual documents are displayed in any case.

The multilingual documents are displayed differently depending on your linguistic selection:

- ✓ If you do not select any content language filter:

The results list shows all the linguistic versions of each multilingual document.

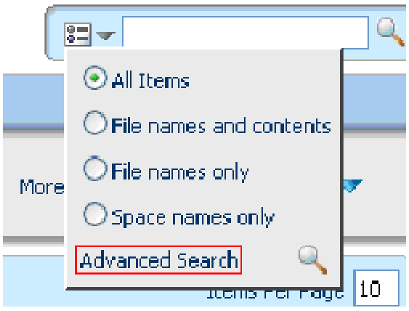
- ✓ If you select a content language filter:

The results list contains the translations that match your content language filter.
They are displayed in the language you have selected as a filter if they have a translation matching this filter.
Now let us imagine that a search comes up with a multilingual document which contains no translation in the language you have selected as a filter. If so, only the original document is listed as a result. The language code of the original document is then displayed next to the document name.

About advanced searching

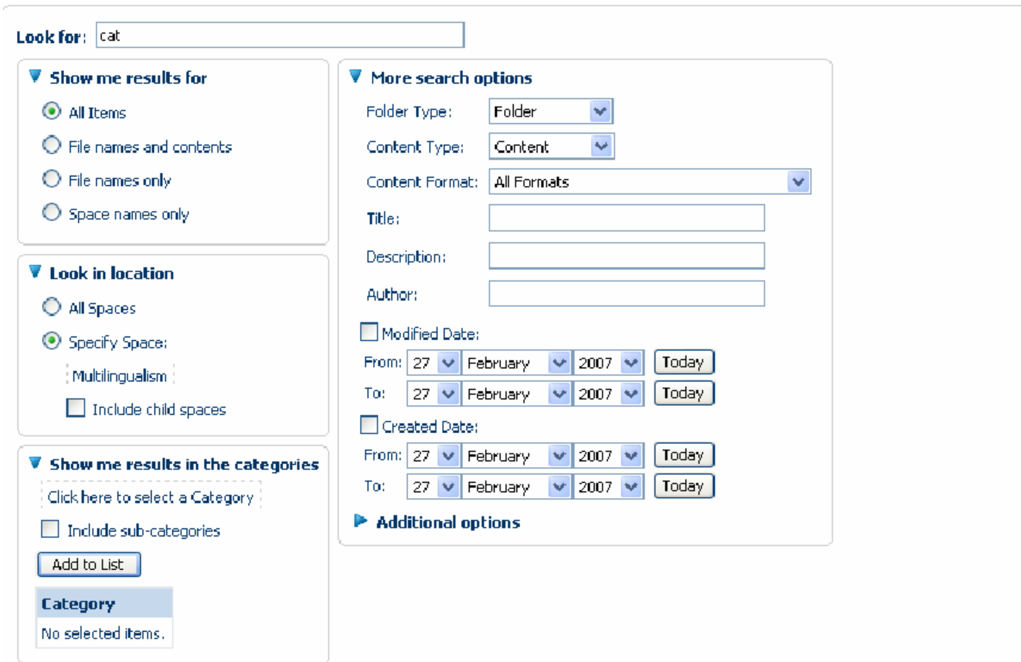
The general search enables you to perform the most frequent queries. Therefore, you can take advantage of the Advanced Search to execute finer searches.
The **advanced search** is purposed to building queries involving dates, time spans, specific file formats … You can also use it to search in specific sub-spaces or retrieve documents only in a given language .

How can I perform an advanced search?



where to run the Advanced search from

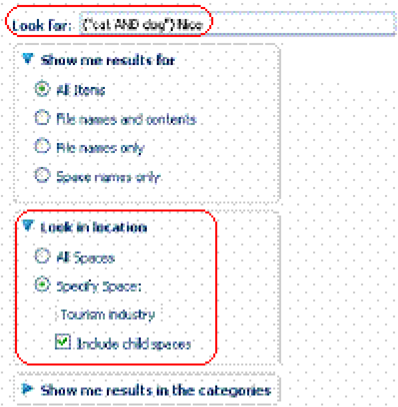
Only those who can access the "administration" service can perform advanced searches.
The advanced search can be launched through the icon which can be found besides the "General Search" box in the Alfresco native user interface (accessible through "administration").



The Advanced search interface

The advanced search interface offers you various sets of options, grouped in a single search screen.
You key in a query in the **Look for** search field;
Additionally, you can select filters from the various options …

Search only in a specific space (including or not its sub-spaces)



search in a specific space

In this example, we try and find items which contain either 'Nice' or both 'cat' and 'dog'.
Notice that, an implicit truncation being applied, the plural form (cats, dogs) is taken into account.

We expand '**Look in location'** to narrow searching to the space titled 'Tourism industry'. By crossing **Include child spaces**, we request for its sub-spaces to be explored, also. We wish to have the **all items** explored.
The results will be listed in any view of your choice ('detailed view', 'icon view', etc).

Search documents in a specific language

The Advanced search enables you to filter your search according to the language of the documents.
With the Language search options, you can narrow your search to the results that have a version in your current language filter or in any language you wish. Alternatively, you can choose to search on documents in "all languages".

Detailed information about searching documents in a specific language will be released further.

Search on dates or time-span

We can search any item (space as well as content) with its creation or modification date. If we are in a doubt about the precise date, we shall search over a period.

To do so, we expand **More Search options** and make use of the search assistant.
This allows us to ask for items created/modified

- ✓ Today
- ✓ On a given day
- ✓ Within a given time-span

search with dates or periods

This may be combined with any other Advanced Search action such as looking for a content stored in a precise format.

Search with the content format
This could be of some use to those who are working with a great variety of file formats. For example, that provides an easy way to retrieve audio or multimedia contents, more quickly.

We press on the icon and we choose the Advanced Search mask. We expand **More search options**. Then we scroll down the 'Content format' list and pick out a format.

Although you have reached a stage where you are skilled in building complex queries, you would certainly appreciate not to repeat such task whenever you need to launch a same search. Fortunately, you can save your requests.

Save and re-use queries

Saving General and advanced searches
Please, note that only those who can access the "Administration" service can save searches.

You create and run a query through the Alfresco native user interface. Having looked at the results and appreciated the degree of relevance of your search, you decide to save it. You stay on the **Search Results** page and expand **More Actions**. Then you click **Save New Search**. You are requested for giving a name to your search. You can add a description if you wish so. The saved search, indeed, will be considered a specific item. This will be explored by the search engine as any other item and may come as a result of some other search.

- So, how to recognize a saved search among the search results? - The icon comes along with each saved search on the results page.

More attractive is the **public/private option**.
As saving a search, you can choose to let it available for any other IG user or, at the opposite, keep it for your personal use.
To allow the other IG users, whatever be their access profile, to search with your saved request, you cross the **Save as a public search available to all users** option.

Accessing a saved request
If you know its name, why not to use the General Search and look for words in the 'files names'?
If not, you will follow a path a few longer but not less efficient:

Once you have reached your library first page, you click the up right Search icon () and pick 'Advanced search' out of the options list.
The advanced search mask is displayed with its toolbar proposing you to **'Select a saved search**'. By expanding this, you can see the list of both the public and your personal searches.

Retrieving a saved search

Modifying saved searches

Basically, this runs in four steps:

- ✓ **retrieve** and display the search to be modified;
- ✓ **make changes** in the query;
- ✓ **check** the modified search by running it once;
- ✓ **save** the modified search.

The last step, however, will slightly vary depending on whether you are the author of the search to be modified.

For example, we use a search titled "Food safety":
Step 1: we select **Advanced search** via the icon. Then we expand **My saved searches options** and click

- ✓ **Your searches**, if we had limited access to ourselves;
- ✓ **Public searches**, if we had made our search available to every member.

We choose "Your searches".
We expand **Select a saved search** which comes along with all of the saved searches that are only for personal consultation. We select "Food safety".

Step 2: the search criteria saved under "Food safety" are displayed. We make the changes we wish.

Step 3: we run the modified search in order to test it. If it comes up with relevant results, we click **More actions** (at the top of the results page).

Step 4: we are the author of the saved search you are about to modify; no matter whether we have made it public or not.
We click "**Save modified search**" (in **More actions** menu). We have then to make a choice between **overwriting the old version** with the modified one and **saving** the latter **as a new search**.

If we are working with a public search built by someone else:
we have no choice. We may not overwrite a search that has been created by anybody else. We can only **save the modified version as a new search**.

You are able to deal with any kind of search in CIRCABC. To build complex requests is not any longer a secret to you.

You know how to share queries with the other users and you are able to identify the other members of the IG. Now we shall learn how to communicate with the other users: we shall see how to participate in a discussion about the content of the IG.

About the newsgroups

You may wish to exchange your views about a specific content with the other members of the Interest Group. This may be 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 is delivered to you along with the 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 about topics chosen independently of the contents of the Library.

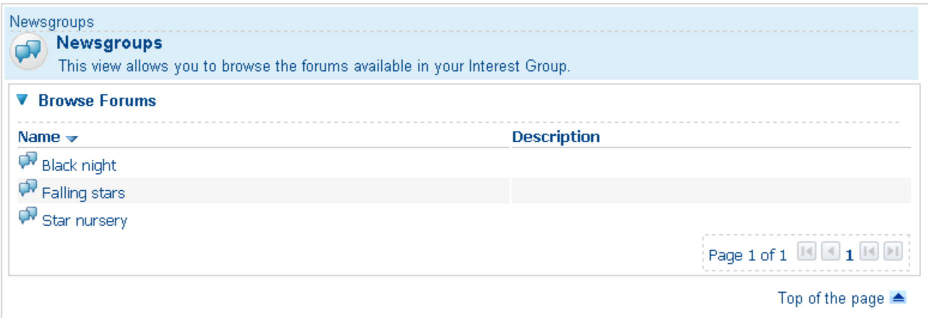
A Topic is the theme of a group of messages.
A Post is an original message or a reply to a message.
Each forum contains "Topics". In each Topic, "Posts" are created, read and answered.

How to manage newsgroups

How to deal with forums

Access forums

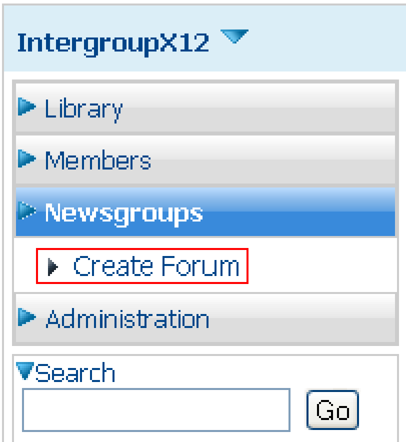
First of all, you select "Newsgroups" from the CIRCABC main menu. In so doing you access the "Newsgroups" welcome page where the forums are listed.



The Welcome page of "Newsgroups" presents the Forums

Create forums

Users who are granted the "Administrate" role over the Newsgroups service can create forums.
They choose "Newsgroups" in the services list of the interest group. 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 (to be selected from the interest group services list) and click the

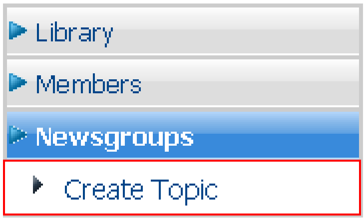
name of a forum of your choice. The topics developed in the forum are listed on its Welcome page.
You can see their name and the number of answers they have given rise to.

The Welcome page of forum "Falling stars" presents Topics

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 to be discussed.

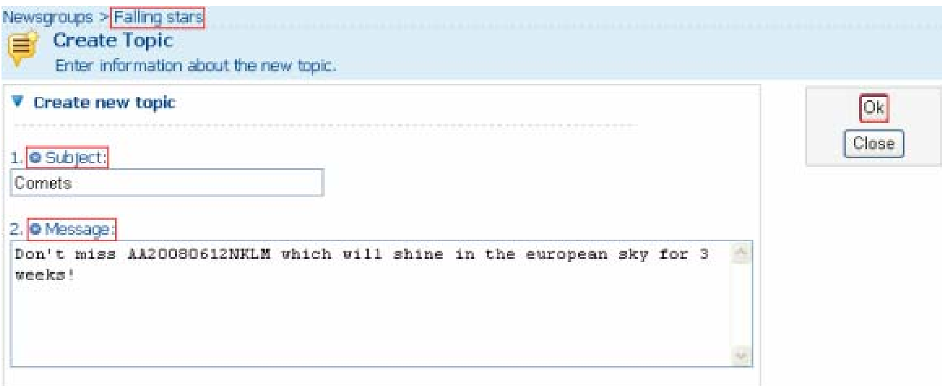
While the forum Welcome page is displayed, the option "Create topic" is revealed under the "Newsgroups" option of the services list.



What you see if you are allowed to create topics

It should be noticed that, according the CIRCABC principle of "what you see is what you may do", those who may not create topics do not see any command under item "Newsgroups".

You press on "Create Topic" and the "create topic" form appears.



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 a 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.

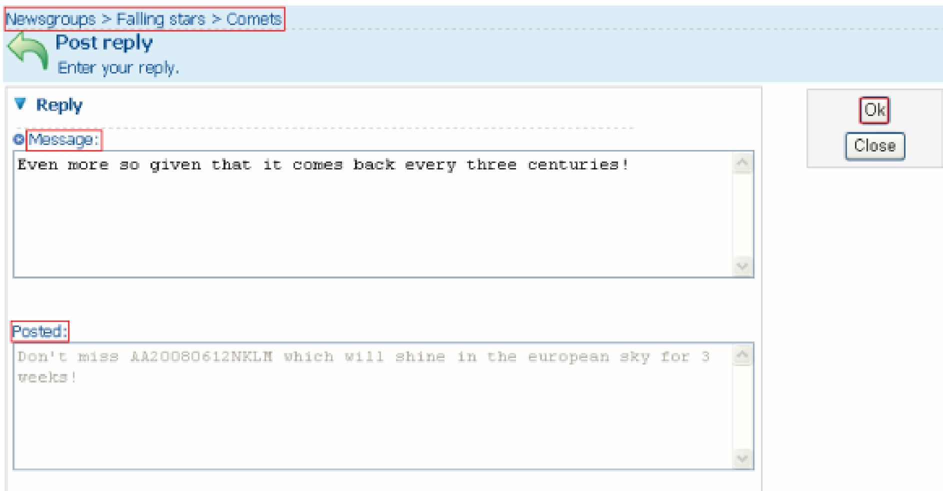
The Welcome page of topic "Comets" presents Posts

You can see the text, author and posting date of each message. You can answer through the icon "post reply" if granted sufficient permissions.

Create a post

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

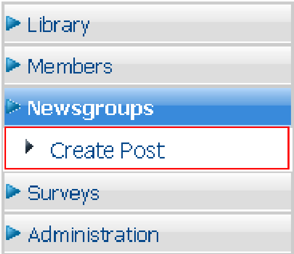
To reply to a post of your choice, just click the "post reply" icon as suggested above. This displays the following form:



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.
View a discussion means viewing and answering the items posted during a discussion already started.
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 discussions on these contents.

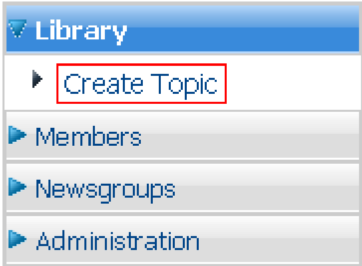
How can I start a discussion?

You open the "**Details**" view of the content you wish to discuss about. You will find the "**Start discussion**" icon () 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 IG 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 under "Library" in the services list:

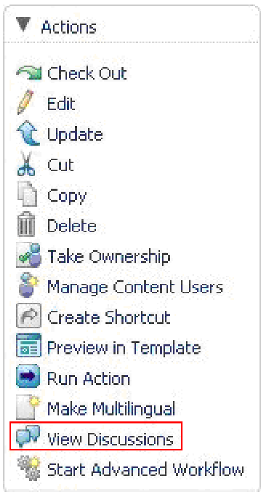


Click "create topic" to broaden the discussion

How can I participate in an ongoing discussion?

Access and read messages

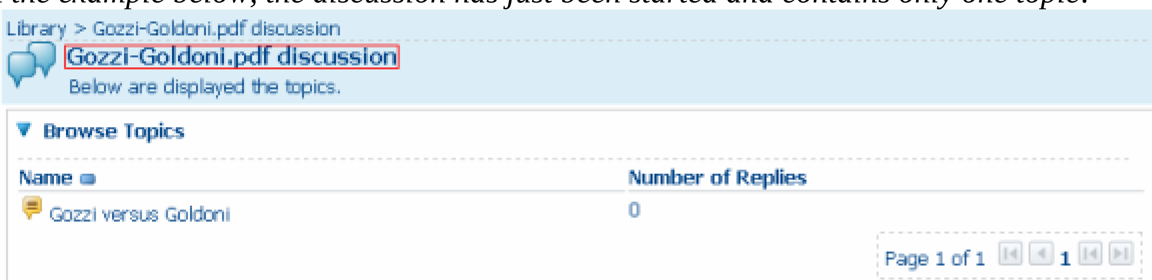
As soon as an IG member has posted a first message, the "**View discussions**" icon ( ) comes up in the action list of the content's "Details" page, in place of "start discussion":



View discussions

By clicking this icon, you can reach the discussion topics 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 icon. 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.

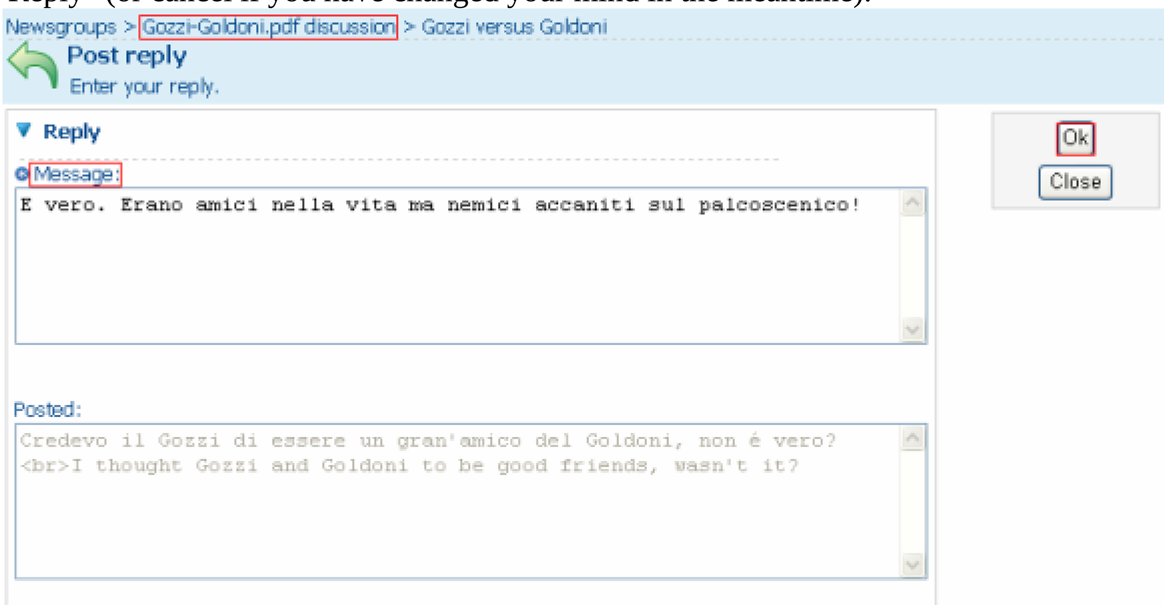
Browse posts

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 warnings 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 IntergroupX12 (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 The future of young farmers of the interest group IntergroupX12 (category: Category12).

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 type of users 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

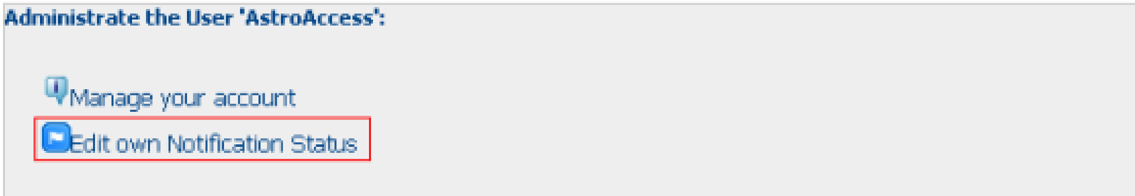
The notification service is disabled by default. To get a chance of ever receiving notifications, you must enable them at the global level of your user account. How to do that?
As soon as you get connected, press the "Administration" link from the CIRCABC "main menu". Click the "Manage your account"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

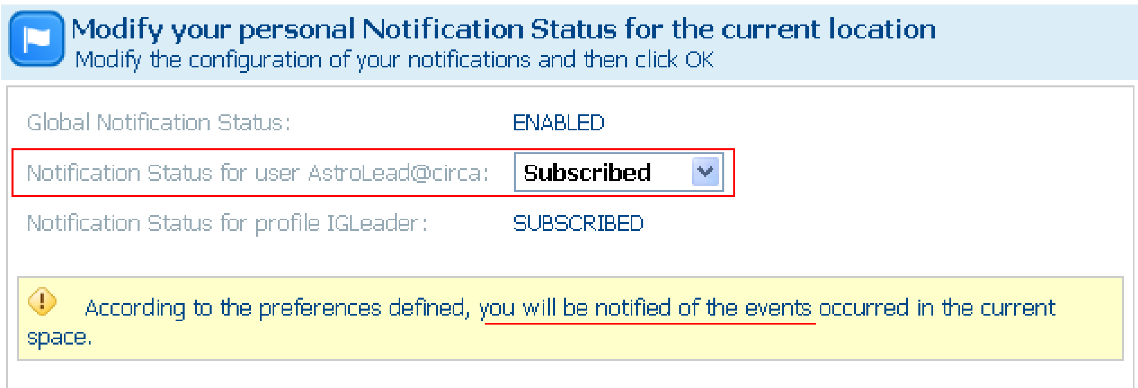
Once you have set "global notification" to "enabled" (do not forget that this is a sine qua non of receiving notifications), you have to check your user notification status. This must be set to "subscribed" to let warnings reach your mailbox. This status, however, defaults to "unsubscribed". It can be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

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" if it is still in its default position and that you wish to be warned of new uploads.



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 such or such 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 let it worry you! 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 the interest group

We have just seen how to set your notification status at the root of the interest group. 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 for a 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 explained above.

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 left-handed 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" at this level. Now turn "user notification status" from "inherited" to "subscribed". You will receive the notifications of new uploads without receiving anything about the messages going off and on through the newsgroups.

Being warned of events in one sub-space of the Library

The following explanation is valuable for one forum (or even some forums) of Newsgroups as well.
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 explained above.
If, here too, you find "inherited" as a status, please look at the short dialog above.

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

How to use the surveys

For further release