GETTING STARTED MANUAL



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OTHER CINDOC DOCUMENTATION

- CinDoc Administrator Reference Guide
- CinDoc User's Guide
- CinDoc Client System Manual
- CinDoc Server System Manual (Windows NT/2000/XP/2003)
- CinDoc Server System Manual (Linux)
- CinDoc WEB System Manual
- CinDoc Toolkit Manual
- CinDoc Automation Object Model and User Exit Technical Documentation
- CinDoc ODBC Driver Technical Documentation
- Migrating to CinDoc Version 4
- CinDoc Error Codes and Diagnostics Reference Guide
- CinDoc Thesaurus Manager Guide

All the CinDoc manuals are available as electronic files in Acrobat format (PDF extension) which enable you to browse using hypertext links and carry out full-text searches.

We welcome your comments

In order to provide greater customer satisfaction and ensure product quality, we encourage any comments on the technical content and new presentation of the CinDoc documentation.

A questionnaire is available for this purpose on our web site and can be accessed by clicking on the following link: <u>http://www.cindoc.fr/questionnaire/questionnaire-eng.asp</u>

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GENERAL INFORMATION ABOUT CINDOC WEB

CinDoc WEB operates with a Web server to enable existing CinDoc databases (archives) to be distributed over Internet and Intranet networks. It is a text-based information processing software package which offers Electronic Document Management (EDM) functions. By working in conjunction with a Web browser, it offers effective, powerful and user-friendly features enabling you to retrieve and manage structured and unstructured information, stored in binders and folders, respectively. All these features can be configured by the administrator. Information input, storage, restoration, search, acquisition, processing, archival and viewing facilities are available for all types of documents. Users are therefore able to manage binders as well as the documents which they link to these binders.

CinDoc Web 4.3 offers a new intuitive, simple and user-friendly interface for the CinDoc product in a Web environment. This interface responds to a widespread need to CUSTOMIZE different installations. The following items in CinDoc WEB can be completely customized by your Web administrator:

- Accessible data and documents (CinDoc archives, fields, descriptions, etc.).
- Data presentation (HTML templates, graphics, style, images, etc.).
- Functions available to a connected user.

All these settings are detailed in Part III of the CinDoc WEB System Manual.

Important additional features have also been integrated in CinDoc WEB 4.3. These include:

- Viewing additional descriptions for each CinDoc archive in the list of available archives (Figure 4)
- With related archives, possibility to view their linked binders (Figure 27)
- Possibility to export binder data directly in Word format from the List View, Tile and Document Selection screens
- The possibility to print in different formats: List View, Tile, Document Selection and detailed view formats (individual binders and documents)
- With archives containing different data categories, automatic display and input using dynamic masks (sets of fields), activated according to the particular data type (Figure 38)
- The possibility to have optional search functions containing specific queries (recent binders created over the
 past specific number of days, etc.). These are accessed through additional commands displayed in the side
 menu to the left of the different pages (Figure 6)
- Quick access to index contents via letter or number (Figure 14 or Figure 40)

This list is not exhaustive but simply provides an overview of the main new features.

Information Management Structure



Figure 1 – Organizational chart illustrating the general CinDoc data structure

In CinDoc, the term EDM (Electronic Document Management) refers to the ability to link folders to binders, and to manage the contents of folders. EDM can be activated in the settings of each archive.

What is a CinDoc Archive?

An archive is a document-based database which can be configured in a Windows client interface to meet the user's requirements.

Each archive contains:

- A data file that stores information in the form of <u>binders</u>, which all have the same structure.
- Information on the structure of this data file
- Any <u>indexes</u> associated with this data file
- The associated documents organized into <u>folder(s)</u>.

What is a CinDoc Binder?

A binder is similar to a record in a traditional computer file or database. Each binder contains a number of data **fields**, specified and structured by the user who is an owner of the particular archive. Binders are limited to **9000** characters each. The field contents may contain an unlimited number of characters, provided that the limit for the binder itself is not exceeded.

Fields can contain text, numeric or date information, or other types of data. For text fields, field contents may be separated where applicable by a special character: the item separator.



<u>NOTE:</u> Only the first field, the access key field, has a fixed length. Its contents are unique per file and it enables CinDoc to identify each binder.

- Access keys can be either **numeric** (automatically assigned by CinDoc) or **alphanumeric** (assigned by the user who creates the binder).
- When EDM is activated for an archive, CinDoc automatically creates a field called GED_LNK in the archive which cannot be modified and contains the number(s) of the folder(s) linked to each binder.

[See Figure 1]

What is a CinDoc Folder?

A folder is a logical set of one or more documents grouped together by the user according to his/her needs. Folders can contain different types of documents (files). These files can be a single page, as with a scanned TIFF file, or several pages long, as with a Word or Excel file.

Note that folders are not necessarily linked to binders as they can exist in a non-archived state, i.e. pending association to a particular binder. If the archive is configured for this purpose, archived folders can be modified. If this is the case, the archived folder to be modified must be placed in revision by the **archivist** (see archive revision). Once it has been modified, you can choose either to replace the original folder or create a new version of the original folder, which will then still be accessible.

[See Figure 1]

What is a CinDoc Index??

This is a specific CinDoc file which reproduces the contents of one or more fields in a file or relevant results set in alphabetical order. These field values are either retrieved as is or reformatted, and then associated with particular fields in the binder, usually the access key field. They are used as aids during querying and field input as well as for sort display.

Indexes are created and configured from the Windows client interface by the CinDoc administrator (or a user who is an owner of the particular archive).

[See Figure 1]

About the Pages in the CinDoc Web Interface

The CinDoc Web interface contains pages for accessing and presenting CinDoc data via your Web browser window.

There are different ways to display data and you can choose between viewing binders or documents. Two different views now enable you to access binder data: detailed view of the current binder (which may or may not have linked documents) and list view of a set of binders. Two other views grant access to document data: detailed view of a document (which may or may not be linked to a binder) and tile view of a set of documents.

The different pages assigned to assisted querying, expert querying, searching multiple archives, adding binders, list view, tile view and document selection can be activated or deactivated (via commands displayed as hypertext links) for all users or particular user profiles. This enables you to have different levels of information available.

Page sequencing can also be configured according to the published CinDoc archives and/or user profiles. For example, a particular view can be activated after a query for a user who is very familiar with how CinDoc WEB functions.



Figure 2 - Schema of all the pages linked to functions that can be performed on an archive with CinDoc WEB

Legend:

Green: pages displaying information; **dark blue:** assisted query pages; **black**: data input/archiving pages; **red**: input assistance pages; **pink**: document selection page; **light blue:** document viewing window; **brown**: Send by E-mail window.

The CinDoc WEB screen shots in this manual are shown in a Microsoft Internet Explorer® window and mainly involve the EDMDEMO demonstration archive provided with the default templates and settings configured on installation. These could therefore differ from your own installation, depending on how CinDoc WEB has been customized. However, the different functions described are used in the same way.

ACCESSING CINDOC DATA



CinDoc data is accessed from the home page which by default, groups together all the main pages accessible in the Web interface.

You may find that the CinDoc WEB administrator has configured pages asking you to log on with your user ID and open one of the available archives before the home page is displayed. It is also possible that a default ID and archive may be configured.

About CinDoc Access Control

Access control enables authorized users, either individually or as members of a user group, to access CinDoc archives declared for the Web by means of specific CinDoc access rights and user profiles configured by the Web administrator.

Only the CinDoc archive administrator (*super*) and all *As Super* users can create users and user groups and assign them passwords as well as access rights through the CinDoc Windows Access Management utilities.

Access rights to a particular archive range from 0 to 5 and are a combination of the basic rights described below. In CinDoc Web, these rights are the following:

- **1**. VIEW an archive: search for and view binders in standard or sorted display together with their associated documents (with an EDM-activated archive).
- **2**. PRINT binders (in CinDoc WEB, all users able to access an archive, even those with read-only access, can print a binder through their Web browser and send items by e-mail).
- **3**. MODIFY individual binders
- 4. ADD a binder
- 5. DELETE individual binders



<u>NOTE:</u>

- If a user has not been assigned any rights to a particular archive, this archive will not be accessible when he/she logs on.
- These levels are not hierarchical. You can have level **4** rights for input without having level **3** rights for modifications.
- Additional users exist with a particular status:
 - As Super users have the same rights as the CinDoc archive administrator: they can manage all archives and all users.
 - Archive *owner* users are automatically assigned all rights to these archives.

In addition to these five access rights which determine the types of actions which users can perform within an archive, CinDoc has an additional <u>security</u> system which enables you to *filter* the information contained in your archives by controlling access to binders.

About EDM Rights

These include acquiring, modifying, deleting and archiving documents and are assigned to users with *archivist* status for a particular archive.

This status can be specifically assigned to users and user groups (by the CinDoc archive administrator or *As Super* users) or be automatically conferred on a user when he/she creates an archive.



<u>NOTE:</u> If the same archivist user logs on several times (with write access) to a particular archive, CinDoc will only award him/her the rights associated with archivist status once for this archive (when he/she first logs on).

Connecting to CinDoc

A CinDoc data server is accessed from a CinDoc Web client by means of a specific URL defined by the CinDoc administrator and activated using your Web browser.



<u>NOTE:</u> CinDoc connections can be configured by your Web administrator to be automatic for a particular user with specific permissions or manual, requiring you to enter login information.

With manual connections, the connection screen will look as follows:



Figure 3 - CinDoc WEB client connection screen

As indicated in this screen, you will need to identify yourself in order to access CinDoc data.

Entering your User Name

If no user name is present, or if you wish to select a different user name, click in the user name text box and enter a CinDoc user name exactly as defined by the CinDoc archive administrator, i.e. user names are case-sensitive.

[See Figure 3]

Entering your Password

Once you have entered your user name, you must then enter the corresponding password, if one has been assigned by the CinDoc archive administrator.

To access the password text box, click directly in this box or press the tab key.

Type each character exactly as indicated, i.e. passwords are case-sensitive. The characters entered will be displayed as asterisks (*) for security reasons.

[See Figure 3]

Saving ID Information

This option may not always be configured.

Check the *Save user and password* box to activate it. This avoids having to retype your user ID if you remain on the same Web client workstation.

To deactivate this function, simply uncheck this box by clicking on it once more.

[See Figure 3]

Defining your Connection Mode

This option may not always be configured.

If you wish to add or update data in a CinDoc archive for which you have write and/or archiving rights, check the *Write access* box to activate a CinDoc Web connection with write access (input license).

Do not check this box if you only wish to view data in the particular CinDoc Web session.

[See Figure 3]

Confirming your Connection

Once you have selected the required logon settings, click on OK.

If there is no such user name or status or if the password is incorrect, CinDoc will display an error message in the page.

If no more CinDoc Web input licenses are available (depending on how many were purchased with the CinDoc Web product) when you attempt to log on, your connection will be denied and an error message displayed. You can then either uncheck the *Write access* box and click on **OK** or wait until an input license connection is freed.

However, if the connection is accepted, the <u>list of archives</u> available to you at this particular time will be displayed. This list can vary depending on the settings configured by the Web administrator.

[See Figure 3]

Disconnecting from CinDoc

All CinDoc operations in the current session will be completed correctly and no confirmation message will be displayed.

To log off from CinDoc WEB, click on the **End session** command situated on the left of the home page and the page listing the available archives.

When you are not logged on with write access, you can also log off as follows:

- Closing your Web browser window.
- Changing the Web address.

CinDoc Web can also log off automatically if the program remains idle after a specified lapse of time. Irrespective of the operation performed, you will always be returned to the connection screen. The session timeout is configured by the system administrator; this function can also be deactivated by your Web administrator.

Opening a CinDoc Archive

Once you have successfully logged on, a choice of archives to open are displayed in a separate page.



<u>NOTE:</u> If you only have access to one CinDoc archive published on the Web, this will be opened automatically and the home page displayed.

Only the archives declared for the Web and to which you have at least CONSULT rights will be displayed.



Figure 4 - List of CinDoc archives available for the connected user

To open a particular archive, click on the link for its name (as shown in the above figure) and/or its description. The Home page will then be displayed.

Before doing this, you can also check the *Save as default* box (if the administrator has configured this to be available). When you next log on, the Archive List screen will be bypassed and CinDoc WEB will switch directly to the selected archive.

To select a different available archive at a later stage, click on the <u>Archives</u> link to the left of the home page. To deactivate this function, simply uncheck this box by clicking on it once more then open the selected archive.

About the Home Page Enabling Access to CinDoc Data

This is the main page for accessing information; it groups together all the other pages in the CinDoc Web interface and includes the functional component to be used.

This screen is accessed either by entering a new user ID and selecting a particular archive or directly, depending on the settings configured by the Web administrator.

The home page consists of a side section containing links to the main CinDoc WEB data access functions (depending on your rights) and a central section that displays information according to the active functional component. A header indicates the name of the archive you are currently working on.

Depending on the configured settings, the home page will display items in the centre enabling you to:

- Perform a <u>Multiple Archive Search</u> (where users compose their queries according to a set format and submit them to several accessible archives)
- <u>Assisted Query</u> (where users compose their queries according to a set format)
- Expert Query (where experienced users compose their queries freely)
- List View for viewing the set of results for a query defined by the Web administrator
- Tile for viewing the set of relevant documents for a query defined by the Web administrator
- Add for switching to add/new binder/document folder mode (if the user has the required permissions)



Figure 5 – Home page including the assisted query component for searching CinDoc data in the current archive

SEARCHING FOR INFORMATION



The different querying modes enable you to retrieve relevant information according to specific search criteria.

CinDoc offers three types of search facilities enabling you to submit queries: simple and direct searching of a set of configured fields in the archive; assisted searching using a form configured according to the fields in the archive (or several archives) and expert searching enabling users to compose their own query histories and search a particular archive.

The Web administrator can also set up preconfigured queries.

Submitting a Preconfigured Query

When this option has been configured by the Web administrator, one or more links will be displayed in the side menu, each containing a preconfigured query to search data in the current archive.



Figure 6 – Side command menu containing preconfigured queries

The query contents and label are configured by the Web administrator of the current archive. Such queries can be simple or complex.

To retrieve the results of a preconfigured query, simply click on its particular link.

Depending on the configured settings, CinDoc WEB will then display the <u>List view of relevant binders</u>, <u>Tile view of documents linked to the relevant binders</u> or <u>Tile view of relevant documents</u>.

Simple Search: Submitting a Query Directly

When this function has been configured, CinDoc WEB enables you to submit a simple query to retrieve data from the Search section located in the header of all the main pages (once an archive has been activated).

| Search | Industry art | icles and pho | otos |
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| | | | |

Figure 7 – Simple search header section

You compose your query according to the search criteria configured by the Web administrator for this archive. With this query mode, you can search for a string of characters in one or more fields in the archive (binder search) and/or in the linked documents (Full-Text searching of archived documents linked to the binders).

The value to be searched for is entered directly in the text box using the keyboard (you do not have to type any field names); to submit the query, click on OK.

By default, the Web administrator chooses the Boolean operator (AND or OR) to be used to combine the configured fields.

Depending on the configured settings, CinDoc WEB will then display the <u>List view of relevant binders</u>, <u>Tile view of documents linked to the relevant binders</u> or <u>Tile view of relevant documents</u>.

Assisted Query: Searching via a Form

Assisted query mode enables you to search for one or more criteria in the indexed fields of an archive and/or configured by the Web administrator via an automatically generated form and is very simple to use. The different query criteria are then grouped to form an overall result.

To activate this query mode, click on the <u>Assisted Query</u> link in the side section of your CinDoc WEB page (if configured) or call up the Home page (*Home* link) if this function has been implemented.



Figure 8 – Assisted query mode form

Selecting the Search Criteria

SEARCHING FOR DESCRIPTIVE DATA IN BINDERS

To search the contents of binders, enter the search criteria in the text boxes to the right of the appropriate fields. You can enter the criteria using the keyboard or the <u>query assistance</u> by index or hierarchical list tools, which are assigned to the fields. Only indexed, queryable fields will be displayed.

In the example in Figure 8, 2 binder search criteria have been defined:

- The language of the document being described (LANGUAGE field = English OR French)
- The document descriptors (KEYWORD field = EDM OR DOCUMENT MANAGEMENT)



<u>NOTE</u>: The total length of the query (including all criteria) cannot exceed 500 characters. The **Clear** button enables you to erase the content of the current query text box; the O button on the top right will reset the entire query page.

SEARCHING FOR FULL-TEXT DATA IN ARCHIVED DOCUMENTS

If <u>Full-Text searching</u> is activated for a particular CinDoc archive, a FULLTEXT text box will be available, which enables you to query the contents of the documents linked to the binders in the particular archive. You can also search binders at the same time, as in the example in <u>Figure 8</u>, where the term COMPUTER is searched for.

[See Figure 8]

Choosing the Operator to Combine the Criteria

When the option to choose the inter-field operator has been configured.

If you select several binder criteria, you must choose how you wish the criteria to be combined (<u>Boolean</u> <u>operators</u>):

- Choosing the **AND** operator will search for all the binder criteria: all the criteria will be combined to form a results set in which each binder must meet ALL the criteria searched for.
- Choosing the **OR** operator will search for at least one of the binder criteria: all the criteria will be combined to form a results set in which each binder must meet AT LEAST ONE of the criteria searched for.

ATTENTION: The AND operator will automatically be used to combine the Full-Text and binder criteria: only the binders linked to relevant documents and which fulfill ALL or AT LEAST ONE of the binder criteria will be retrieved in the overall results.

[See Figure 8]

Submitting the Query and Viewing the Results

Click on **OK** at the bottom of the form. CinDoc will then display the results for individual criteria together with the overall results. Click on the relevant number of results to view them in the screen configured by the administrator:

- List View
- <u>Tile View</u>
- Detailed view with browsing from relevant binder to relevant binder
- Detailed view of relevant document per relevant document.

In the example in <u>Figure 8</u>, the query was submitted to the current archive, EDMDEMO, and 3 overall results were returned. The overall results are a combination of the relevant binders for each of the 2 binder criteria and the binders linked to the relevant documents retrieved in the FULLTEXT search:

(First 20 results [out of 25] OR 6 results) AND 5 Full-Text results = 3 overall results.

[See Figure 8]

Searching Multiple Archives

To activate this search function, click on the <u>Multiple Archive Search</u> link (if present in the side section of your CinDoc WEB page).

A search screen enables you to query several archives at once using a specific form. This consists of fields/criteria shared by the archives that are selected by the Web administrator and which you can access. The different query criteria are then grouped to form an overall results set.

This function operates in a similar way to assisted query mode; each text box is input directly from the keyboard but there is no <u>query assistance</u> as this is specific to a particular archive. When necessary, you may be asked to choose the Boolean inter-field operator.

Submitting the query will call up the configured results screen but no matter what this screen, results will always be grouped per archive.

In this way, you can query various archives with similar structures using the same selection criteria and then return to the original archive should you wish to.

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Figure 9 – Multiple archive search form

Advanced Querying: Expert Query Mode

Advanced querying in expert mode enables you to submit more complex queries using multiple criteria to search all fields, including non-indexed fields, in the current archive. You should use this mode if you are familiar with query syntax.

The query results are saved as successive steps that can be combined with other criteria to form new queries; this search strategy can then be stored in a history file for use in later CinDoc sessions.

The criteria used can be particular values, parts of values or character strings. They function with identity or comparison operators, e.g. =, < or >, and can be combined with logical operators, i.e. "AND", "OR" or "NOT".

To activate this query mode, click on the **Expert Query** link in the side section of your CinDoc WEB page (if configured) or call up the Home page (*Home* link) if this function has been implemented.

If you do not select a particular history file, a temporary history file will be automatically used for each CinDoc archive (this will be empty at the start of the CinDoc session for the particular archive).

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| • End session | OK Clear | |
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Figure 10 – Expert query mode screen

You have 2 text input sections: *Search Binders* and *Search Documents* (for submitting a <u>Full-text query</u>); you can either submit one type of query at a time or combine the two.

ATTENTION: The AND operator will automatically be used to combine Full-Text and binder criteria: only binders linked to relevant documents and which satisfy the binder query criteria will be returned.

To send a binder query, click on the long name of the field (or its real name) in the drop-down list and select the items in the associated <u>query assistance</u> list, if available.

As well as building a query as described above, the query can be entered manually in the query box, in the following format: Long field name = VALUE or FIELD = VALUE



<u>NOTE</u>: Long field names (and their real names) are case-sensitive. The **Clear** button enables you to erase the contents of the current text box.

Terms will be searched for as they have been typed unless a character simplification table has been applied to an indexed field, in which case all the terms will be automatically converted into either UPPER or lower case and you can type them as you wish.

Including Logical Operators in your Query

You can carry out a **multiple item** search (several words in the same field simultaneously) and/or a **multiple field** search (in several fields).

Enter or click on the command buttons for the AND, OR or NOT logical operators, so as to group the different values and/or fields together.

Examples:

KEYWORD=EDM AND OCR

LANGUAGE=English AND KEYWORD=EDM

In this case, only the binders containing **both** terms will be retrieved:

KEYWORD=EDM **OR** OCR LANGUAGE=English **OR** KEYWORD=EDM Binders containing <u>at least</u> one of the two terms will be retrieved:

KEYWORD=EDM NOT OCR

LANGUAGE=English NOT KEYWORD=EDM

Only binders containing the first term **<u>but not</u>** the second will be retrieved:

[See Figure 10]

Including Comparison Operators in your Query

Comparison operators < (less than) and > (greater than) can be used in querying. They must always be used together with the equal sign; =< implies less than or equal to and => greater than or equal to. These operators are used particularly to query fields containing values of a constant length, such as dates, to enable a range of values to be searched.

Examples:

DATE=>1975* and DATE=<1990*

Only binders whose dates are equal to or between 1975 and 1990 will be selected.



<u>NOTE:</u> For numeric fields whose content is not a standard length, the query VAL=>235 will select all binders where VAL is equal to 300, 999 or 235, for example, but also all the fields where VAL is equal to 90, which is incorrect. This is because the first character in the field (9) is greater than the first character of the criterion (2).

With non-numeric fields, these operators should be used to compare the alphabetical order of character strings.

Bernard will therefore be considered greater than Andrew, Vernon greater than Nicki and Nichelle greater than Mark.

[See Figure 10]





Ensemble 2

Ensemble 1

Combining Different Operators in a Query Using Parenthesis

Different operators can be used within the same query provided there is no ambiguity, i.e. *opening and closing parenthesis* is used correctly to distinguish the search priority.

Example:

In this example, the position of the parenthesis is important as the result obtained is not the same:





 $\underline{\textit{NOTE:}}$ You can use several nested levels of parenthesis depending on the complexity of the query.

[See Figure 10]

[©] Defining an Exact Value to be Searched for: Using Apostrophes

VALUES CONTAINING SEVERAL TERMS

Sometimes, you may need to search for a term containing AND, OR or NOT, which you do not wish to be interpreted as a Boolean operator, or parentheses not to be interpreted as syntactic characters. In this case, you will need to <u>enclose</u> the value to be searched for in **apostrophes** (or single quotation marks).

Examples:

| 'Behavioral and Brain Sciences' | will select all articles containing the exact phrase <i>Behavioral and Brain Sciences</i> |
|--|---|
| 'D-Day (60 th anniversary)' | will select articles containing this exact value as written |
| VALUES CONTAINING APOSTROPHES | |

- First, you will need to add an additional apostrophe for all the existing apostrophes in this value
- Second, you will need to enclose the value to be searched for in apostrophes

Examples: To search for the value Henry's you would type 'Henry''s' in the query You would type ''Gray''s Anatomy'' in the query



<u>NOTE:</u> For binder queries, only apostrophes or single quotation marks and not double quotation marks must be used, unlike with Full-Text queries.

[See Figure 10]

Substituting for a Character String: Using Truncation

The asterisk * or *truncation* can be used to substitute for any number of characters to be searched for.

| Examples: | | | | |
|-----------|----------------------------------|------------|---------------|------------|
| PLAN* | will select the following items: | PLAN | PLANTATION | |
| | but not | REPLANTING | G | |
| *PLAN | will select the following items: | PLAN | BUSINESS PLAN | |
| | but not | PLANTATIO | V | |
| *PLAN* | will select the following items: | PLAN | PLANTATION | REPLANTING |
| | but not | PLIANT | | |
| PL*AN* | will also select the item: | PLIANT | | |
| | but not | COMPLIANT | | |

*P*A*

will also select the following items: COMPLIANT EMPTY HANDED



<u>NOTE:</u>

Placing the asterisk on either side of a word (*PLAN*) enables you to select not only a single value but any character string in a text field. For example: ABSTRACT=*agriculture* will select all the binders containing the word "agriculture" in the summary field, no matter what the context.

Due to the special role of the asterisk character for truncation, it cannot be searched for directly in a CinDoc archive; you cannot request it to be treated as an ordinary character, even by enclosing it in apostrophes.

SEARCHING FOR A NON-EMPTY FIELD

For example, to retrieve ALL the binders where the ABSTRACT field contains information, even if this is only a single character, you would submit the following query: ABSTRACT = *

SEARCHING FOR AN EMPTY FIELD

For example, by querying the access key field (REF in this example) of your archive, and only using truncation, you can very easily obtain the list of binders containing an EMPTY field (here AUTHOR): REF = * NOT AUTHOR = *

[See Figure 10]

The Masking a Particular Character in a Search

The question mark character (?) can also be used to substitute for any <u>single</u> character at one time at the point at which it is positioned:

| AIX?EN?PROVENCE | will select | AIX EN PROVENCE |
|-----------------|-------------|-----------------|
| | | AIX-EN PROVENCE |
| | | AIX EN-PROVENCE |
| | | AIX-EN-PROVENCE |
| | | |

The question mark character can also be combined with the asterisk:

| AIX?L* | will select | AIX LA CHAPELLE |
|--------|-------------|-----------------|
| | | AIX-LA CHAPELLE |
| | | AIX LES BAINS |
| | | AIX-LES-BAINS |
| | but not | AIX-EN-PROVENCE |
| | | |



<u>NOTE:</u>

A question mark represents a single character: n consecutive question marks would therefore be needed to mask n characters.

Due to the special role of the question mark character for masking, it cannot be searched for directly in a CinDoc archive; you cannot request it to be treated as an ordinary character, even by enclosing it in apostrophes.

Due to the special role of these two characters, they cannot be searched for in a file and you cannot request them to be treated as ordinary characters.

See Figure 10

Building your Search Strategy Step by Step

Click on **OK** to save and submit your binder and/or Full-Text queries as you enter them.

Separate results sets will be returned for binder and Full-Text queries, which will be numbered in ascending order; if both types of queries are submitted, a results set (\$ set) combining the two will also be created.

Each results set will indicate the query syntax and the number of resulting binders.

You can also combine queries submitted earlier (if they returned results) by clicking directly on each selected \$ set link or entering the relevant dollar sets in the binder query text box. This will form a new step in the query history, for example \$1 AND \$3. You can also combine an existing \$ set with another search criterion, for example \$4 NOT TITLE = *

Click on the desired results link to display the results screen configured for this type of query:

- List View
- <u>Tile View</u>
- Detailed view with browsing from relevant binder to relevant binder
- Detailed view of relevant document per relevant document.

Remember that you can save your entire <u>query history</u> to a file to enable you to re-use it at a later stage.

[See Figure 10]

Submitting a Full-Text Query to Archived Documents

CinDoc offers Full-Text querying within archived documents in text format. The advantage of this is that their entire contents are automatically indexed, thereby enabling you to search for any term these documents may contain. This facility is only available if Full-Text has been specified along with a working language when the archive was created. The working languages currently supported are English and French.

With queries in <u>expert</u> or <u>assisted mode</u> in a Full-Text enabled archive, a specific section for entering Full-Text queries for documents can be displayed.

Setting Up a Simple Query

By default, Full-Text querying will apply the grammatical rules of the language chosen with regard to word meanings and plural recognition, for example.

Examples in English:

If you search for the following query term: *new* The search engine will also retrieve: *news, newly...*

The character string which you wish to locate in the archived documents must be typed in the Full-Text query box. Any characters can be used, including spaces.

If no operators are specified, the terms will be searched for next to each other in the indicated order (default position operator: BEFORE 1). A term is defined as any string of characters situated between two spaces.

Full-Text querying is not case-sensitive provided that the query term is typed entirely in upper case or lower case letters. However, should the query contain both upper and lower case letters, the terms will be searched for as they have been typed.

[©] Defining an Exact Value to be Searched for: Using Double Quotation Marks

You can <u>enclose</u> a set of terms in double quotation marks " in order to search for the entire character string according to the grammatical rules of the particular language. All the characters in the string will be searched for: parentheses, mask and truncation characters will not be interpreted as syntactic and AND, OR, NOT, BEFORE, NEAR, etc. terms will not be interpreted as operators.

Example: ... "EDM AND THE WORKPLACE"...

When you send the Full-Text query, a numbered results set will be created.

G Using the Masking and Truncation Characters

The asterisk * is used for <u>truncation</u> as a substitute for any alphanumeric characters. It cannot be used to the left of a word with Full-Text querying.

The **?** character (question mark) is used for <u>masking</u> as a substitute for a single character at the point at which it is positioned. You must use as many question marks as there are characters to mask.



<u>NOTE</u>: With Full-Text queries, these characters will not be interpreted as syntactic if they are in a string enclosed in quotation marks.

Including Search Operators in a Full-Text Query

LOGICAL OPERATORS

The <u>logical operators</u>, **AND**, **OR** and **NOT**, can also be entered directly in the Full-Text section and function in the same way as described for binder queries except that in this case, the contents of documents will be searched.

POSITION OPERATORS

These two operators can only be entered directly in the Full-Text query text box (or activated by clicking on the **NEAR** and **BEFORE** commands).

To use the NEAR operator, the character strings to be located in a relevant document must be separated by a specified number of words. A word is defined as a text item separated from the next text item by one or more spaces.

If you select the BEFORE operator, the first character string will only be retrieved in the relevant document when it occurs in front of the second character string, separated by the specified number of words.

In both cases, you can specify the exact number of words to separate the character strings: simply type the required number (ranging from 1 to 1024) immediately after the operator.

If you do not specify a number, this range will be set at **8** terms. If you do not specify an operator, the **BEFORE1** operator will be selected by default.

Example:

A document containing the words:

...COMPANY SPECIALIZED IN EDM AND SEARCH ENGINES...

will be retrieved as a relevant document for the following Full-Text queries:

EDM NEAR COMPANY

COMPANY NEAR3 EDM

(SEARCH BEFORE1 ENGINE*) NEAR (COMPANY OR FIRM)

COMBINING LOGICAL OPERATORS

This is possible provided that the same parenthesis consistency rules are applied as for querying binders. By using parenthesis, you can define subsets so as prevent any ambiguity in the query which would confuse CinDoc.

Example:

EDM AND (HUNGARY OR SLOVAKIA) would not select the same documents as: (EDM AND HUNGARY) OR SLOVAKIA

Viewing the List of Relevant Documents Retrieved by a Full-Text Query

When you submit a Full-Text query, CinDoc WEB enables you to identify the relevant documents in a folder by assigning them a relevance rate (between 0 and 100%); the closer the rate is to 100%, the more relevant the document.

The relevance rate is calculated by the Full-Text engine using complex statistical methods. Elements taken into consideration include the number of terms searched for, the length of the document and the terms retrieved according to the lemmatization rules.

Depending on the parameters configured by the administrator, when you click on a Full-Text results link, you can view the relevant documents in List view which displays the binders they are linked to or in Tile view, which only displays the actual documents.

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Figure 11 – Tile view of relevant documents returned for a Full-Text query

<u>NOTE</u>: When you view the relevant documents in Tile view, ALL the relevant documents will be displayed, per page, in descending order of relevance.

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Figure 12 – List view of binders linked to relevant documents returned for a Full-Text query



<u>NOTE</u>: Depending on the EDM display settings configured by the Web administrator for List View, certain relevant documents will not be able to be displayed directly if they are not the first document in the first EDM folder for the binder (as in the above figure).

Creating and Using Query Histories

CinDoc enables you to save query strategies in CinDoc WEB history files specific to each archive and each user; these are only available from the <u>expert query</u> screen.

Opening a History File

By default, you are positioned on a temporary history file to carry out a new search.

Click in the drop-down list situated at the top of the expert query screen and select the history of your choice in order to re-submit the queries it contains and automatically update the results returned compared to queries submitted in previous sessions.

The name of the active history file, the number of existing steps in the search strategy (\$ sets) and its content (queries submitted and results returned) will then be displayed in the expert query table.



Figure 13 - Screen displaying a CinDoc WEB search history strategy

You can create as many histories as you like for each archive, i.e. by modifying then saving their contents or deleting them (as they are not accessible to other users).

When you open a file of this type, its content is automatically updated and refreshed on screen according to all the binder and Full-Text queries and search strategies it contains.

Saving Query Results

This operation is required should you wish to keep the list of queries and results in a history and re-use them in later CinDoc sessions.

Click on the Save command on the top right of the expert query screen. A dialog box, which differs according to your Web browser, will then be displayed, requesting you to enter a new name for your history file.

ATTENTION: This name must not contain the following unauthorized characters: $\backslash / : * ? < > |$ and is restricted to **50** characters.

When using the current history file, this function enables you to save your new binder queries and add them to the existing query strategy.

See Figure 10

Removing/Deleting a History

To delete the active history when you no longer need it, click on the Solution Delete command on the top right of the expert query screen.

[See Figure 10]
General Information on Querying Aids

Three types of querying aids are available to help you select items according to the different field types and the settings configured by the CinDoc WEB administrator:

- <u>Index assistance</u> (most commonly used)
- Hierarchical List assistance
- CinDoc Thesaurus Link assistance

The query assistance functions do not depend on the query mode and are activated by clicking on the putton to the right of the field you wish to query.

When you confirm the items selected using the querying aids, the query will be automatically submitted, and the results displayed in the active query mode window.

Using Querying Assistance by Index

The assistance page opens in a separate window; it contains the list of <u>index</u> words for the particular source field(s) and a text box to help you find items according to their initial letters. You can then select a set of terms (words or items) which will be used to form the query (shown in the selection section at the bottom of the window).



The number of occurrences of each index item is also indicated for information purposes after each term [an occurrence is counted each time the item is present at least once in the source field(s) of the binder(s)].

Closing the Assistance Window

Click on the **Cancel** command or the **I** close button in the top right-hand corner of this window. You will be returned directly to the query screen without affecting its contents.

G Browsing through/Positioning on the List of Index Items

When this window is first opened, you will be positioned on a list of index items, arranged in alphabetical order (by default, the first 20 terms are displayed, unless modified by the Web administrator).

- A vertical scrollbar is available for browsing through the items in the list according to the configured amount displayed per page.
- To browse between different pages of index terms, use the standard browse commands, also situated at the bottom of the screen: <u>First</u>, <u>Previous</u>, <u>Next</u> and <u>End</u>.
- To position the cursor at a particular point in the list of items, carry out one of the following operations:
 - Enter the first few characters of the desired index item in the text box provided for this purpose then press **Enter** (or click on **OK**).
 - Click directly on the particular letter or number that the search word begins with

When the desired item (or character) does not exist, the list will be positioned on the next highest existing item after the entered characters, in alphabetical order.

Selecting/Deselecting Index Items

1) To select an item in the current page of an index list, click on the desired item followed by the \checkmark button. The item will then be inserted in the Selection section at the bottom of the assistance window. If you have Microsoft® Internet Explorer®, you can also double-click on an item to select it.



<u>NOTE</u>: Item(s) are deselected manually in this list by clicking on the particular item (or several items using the Ctrl or Shift keys) followed by the $\frac{4}{2}$ button.

2) If you have selected more than one item, select the (AND or OR) that will be used to link these items (OR is the default operator).

3) Click on **OK** to close the assistance window, display the original query window and submit the query. The index items selected in the list will be inserted into the query. Each item will be separated from the next by the intra-field Boolean operator, chosen from the list of available operators.

In the example in <u>Figure 14</u>, *field X* will be searched, with *OR* as the selected Boolean operator to link the different query items within this field, namely: **PROPOSAL OR GLOSSARY**

Using Querying Assistance by Hierarchical List

This function displays an additional screen containing a hierarchical list of words arranged in a tree-like structure. It enables you to select a set of items which will then be used to form the query.

A hierarchical list is created separately in the Windows interface by the CinDoc administrator (or archive owner) using a specific module.

| | 🗿 iD CinDoc Web - Hierarchical list assistance - Microsoft Internet Explorer 📃 🗖 🗙 | |
|--|--|---|
| List for browsing through/selecting items in the hierarchy | Africa Armerica Armerica Armerica Armerica Armerica Armerica Armerica Armerica Armerica Benelux British Isles Fieland Fieland Central Europe East Meditersnean Countries Fast Meditersnean Coun | |
| Commands for selecting/deselecting items | Add British Isles/Ireland/United Kingdom Delete OK | Selected items Commands for applying the selection/query to be submitted and closing the |
| | Figure 15 – Query assistance using a hierarchical list | assistance window |

Closing the Assistance Window

Click on **Cancel** or the *in the dedicated assistance window to return to the original query screen.*

^C Browsing through/Positioning on the Hierarchical List of Items

When this window opens, all the first level hierarchical terms are displayed along with a vertical scrollbar, if necessary.

Click on a term in a hierarchical level to view all the terms in the level immediately below it, if any.

Items which have not yet been expanded will be indicated by a plus sign \textcircled ; those that have been expanded will be indicated by a minus \boxdot sign; items at the bottom of the hierarchy, which cannot be expanded further, will be indicated by a \blacksquare symbol.

Selecting/Deselecting Terms in the Hierarchical List

1) When you click on the item you wish to select in the list, it will be highlighted.

If you select a particular item in the list, its NARROWER terms may also be inserted, i.e. those situated DIRECTLY below it in the hierarchy. This is the case if the auto-insertion of narrower terms option has been selected for querying in the hierarchical list. The selected term, and any automatically inserted terms (separated by the item separator character for the archive), will be displayed on a single line indicating the entire hierarchy, ready to be inserted in the selection section below when you click on the **Add** button.



<u>NOTE:</u> To deselect an item in this list, click on the item followed by the Delete button. To select several lines at once in the selection section, click on each of these lines while holding down the Ctrl or Shift keys then click on the Delete button as many times as required to delete each line one by one. You can enlarge the assistance window to view all the items in the expanded or selected hierarchy.

2) Click on **OK** to perform the following operations:

- Close the assistance window
- Insert the selected terms in the CinDoc WEB query page, each separated by the OR intra-field operator
- Submit the resulting query criteria

If the same items have been inserted more than once, either due to errors or the <u>auto-insertion</u> function, any duplications will be removed (*query mode only*) before the query is sent.

In the example in <u>Figure 15</u>, *field X* will be searched, for the following items: 'British Isles' OR Ireland OR United Kingdom OR France

Using Querying Assistance by CinDoc Thesaurus

CinDoc enables you to use the thesauri configured for the archive for query assistance. In this way, you can make use of all the synonym, associative and hierarchical relationships and perform the following operations:

- 1. Explore a thesaurus and select terms in one of 3 specific lists, by browsing through the hierarchical structure of a thesaurus and/or searching for a particular concept via the preferred term (or indirectly via a synonym or one of its relevant words).
- 2. View the semantic environment for a particular term, i.e. its hierarchical context and any information on usage enabling you to verify its meaning.
- 3. Select the term(s) you wish to use (preferred term or concept descriptor) to create your query.

When you select a field that has a thesaurus assigned to it for querying, the assistance window shown below will open. Even if this field is assigned to an index, the index will not open. However, this index will be used when the query is actually sent.



Figure 16 – Thesaurus link assistance dialog box: selecting terms to create a query

Closing the Assistance Window

Click on the **Cancel** command at the bottom of the dedicated assistance window to return to the query screen directly without modifying its content (unlike the **OK** button). Closing the assistance window using these 2 commands will save the current settings of the particular thesaurus on the workstation for the user's next session (size and position of window, active thesaurus list, semantic environment shown or hidden and active viewing language).

However, none of these settings will be saved if the inclusion of the top right-hand corner of this window is used.

Searching for a Concept in the Alphabetical List of Thesaurus Terms

Activating the *Alphabetical List* option in the drop-down list is particularly useful when you wish to position DIRECTLY on the descriptor term of a particular concept, situated far down the hierarchy, without scrolling through the hierarchical list of thesaurus terms.

ONLY the preferred terms (updated descriptors), obsolete descriptors and synonyms (non-descriptors) in the thesaurus will be displayed in an alphabetical list sorted in ascending order of the INITIAL CHARACTERS of these terms, irrespective of their typography.

Non-descriptors (synonyms) will be displayed in the list with cross-references to their appropriate descriptor terms; each cross-reference is displayed on a new indented line and preceded by the **[USE]** code when the working language is English ([EM] code for French).

Likewise, obsolete descriptor terms will be displayed in the list with cross-references to their updated descriptor terms; each cross-reference is displayed on a new indented line and preceded by the **[EQ]** code (historical equivalent to be used).



<u>NOTE:</u> When the concept defined by a non-descriptor is described by several preferred terms, each term will be displayed on a new indented line.

Each time the list is activated, you will be positioned on the first page of terms.

There are 2 ways of browsing through this list:

- To browse through pages of terms in the list in ascending alphabetical order, you can use the scrollbar and the <u>Next page</u> and <u>Previous page</u> links.
- To position dynamically on the desired concept in the list, enter the FIRST (FEW) LETTER(S) OF A TERM in the Find box above then click on **OK**.

If the first few characters entered cannot be found, the page will be positioned on the next closest term in alphabetical order.

[See Figure 16]

Searching for a Concept in the Permuted List of Relevant Terms

Selecting **Permuted List** in the drop-down list is particularly useful when you are not the thesaurus designer and you wish to search for a particular concept for which you are not sure of the indexing term.

ONLY the preferred terms (updated descriptors), obsolete descriptors and synonyms (non-descriptors) in the thesaurus will be displayed in an alphabetical list sorted in ascending order of the INITIAL CHARACTERS of all the relevant words in these terms, irrespective of their typography.

A separate entry will be created for each word in the list; a descriptor term or synonym consisting of several words will therefore be repeated in the list for each of its constituent relevant words and positioned (vertically and horizontally) in alphabetical order of each of these words.

Non-descriptors (synonyms) will be displayed in the list with cross-references to their appropriate descriptor terms; each cross-reference is displayed on a new indented line and preceded by the **[USE]** code when the working language is English ([EM] code for French).

Likewise, obsolete descriptor terms will be displayed in the list with cross-references to their updated descriptor terms; each cross-reference is displayed on a new indented line and preceded by the **[EQ]** code (historical equivalent to be used).

<u>NOTE</u>: When the concept defined by a non-descriptor is described by several preferred terms, each term will be displayed on a new indented line.



Alphabetical sort in ascending order of the main words in the terms, centered in the list

Figure 17 – Permuted list of thesaurus indexing terms (semantic environment hidden)

Each time the list is activated, you will be positioned on the first page of permuted terms.

There are 2 ways of browsing through this list:

- To browse through pages of terms in the list in ascending alphabetical order, you can use the scrollbar and the **Next page** and **Previous page** links.
- To position dynamically on the desired concept in the list, enter the FIRST (FEW) LETTER(S) OF A RELEVANT WORD in the Find box above then click on OK.

If the first few characters entered cannot be found, the page will be positioned on the next closest relevant word in alphabetical order.

In the example in <u>Figure 17</u> above, entering the characters INF has positioned the page on the first relevant word found, INFORMATION for the term CIRCULATION DE L'**INF**ORMATION ; entering INFU (not present) would have positioned the page on the term containing the next closest relevant word in alphabetical order, INITIATION.

Searching for a Concept in the Hierarchical List of Thesaurus Terms

Selecting *Hierarchical List* in the drop-down list will display the constituent terms of a thesaurus in a tree structure which organizes concepts from the general (broader term) to the specific (narrower term). By default, the terms in the first level of the thesaurus are displayed.

To search for a specific concept in the hierarchical list, you must go down the hierarchy, starting from the highest level and moving sequentially through the various subordinate levels. CinDoc also enables you to position directly on a particular descriptor in the hierarchy through the <u>synchronization</u> command.



<u>NOTE</u>: To expand a hierarchical level in the tree structure, click on the 1 icon; to collapse it, click on the \boxdot icon. The \square symbol indicates that the particular branch contains no further subordinate levels.

In addition to descriptor terms and their synonyms, and depending on the settings and structural organization of the thesaurus, a hierarchical list can contain terms used ONLY to classify the different hierarchies (macro classification by domain and/or microthesauri) or create intermediate divisions within the different hierarchies (facet indicators); the following types of terms can be displayed:

- Domain name identified by the 🔍 icon: this term cannot be selected and must be situated on the 1st hierarchical level in a thesaurus.
- *Microthesaurus name* identified by the ^{*} icon: this term cannot be selected and must be situated on the 2nd hierarchical level in a thesaurus if it has domains; otherwise, it must be on the 1st level.
- *Facet indicator* identified by the 🗵 icon: this term cannot be selected and may be situated on any hierarchical level in a thesaurus except macro classification levels when they are present.
- Descriptor term identified by the 🗐 icon: this term can be selected and may be situated on any hierarchical level in a thesaurus except macro classification levels when they are present.
- Obsolete descriptor term (or historical equivalent) identified by the ^[] icon: this term can be selected and is cross-referenced to its updated descriptor term. It will be situated on the hierarchical level directly subordinate to its replacement descriptor term which it remains linked to.
- *Non-descriptor term* identified by the 🗐 icon: this term can be selected and is cross-referenced to the preferred descriptor term. It will be situated on the hierarchical level directly subordinate to the descriptor term it is linked to.

When there are many terms of the same type in the same hierarchical level, these terms (descriptors, synonyms and facet indicators) will be grouped together to facilitate viewing.



Figure 18 – Hierarchical list of thesaurus terms with macro classification of concepts by microthesaurus (semantic environment hidden)



<u>NOTE</u>: With a thesaurus that supports polyhierarchy for its descriptors, a descriptor term representing the SAME SEMANTIC CONCEPT can be present in several hierarchies.

The number of terms displayed in the list will depend on the size of the thesaurus link assistance window. To view all the terms as you move down the different levels in a hierarchy, you can hide the semantic environment workspace for the particular term you are positioned on in the list.

Showing/Hiding the Semantic Environment Workspace for a Term

You can hide the semantic environment workspace, situated to the right of the assistance window, in different ways:

- Dragging the bar separating the list from the semantic environment with the mouse
- Clicking directly on the **<u>Semantic environment</u>** link:

If the dedicated semantic environment workspace is not shown for a term, CinDoc WEB will then display it to the right of the assistance window.

If it is currently displayed, the dedicated semantic environment workspace will be hidden and only the active list will be displayed in the assistance window.

This workspace will ONLY be updated according to the Descriptor (\blacksquare updated or 1 obsolete) or \blacksquare Synonym you click on in one of the thesaurus lists (see above sections).

The semantic environment displays additional characteristics saved for the term in order to clarify its meaning and indicate any related concepts:

1) With an obsolete DESCRIPTOR term, you will only see its *updated descriptor term* in the workspace.

2) With an updated DESCRIPTOR term, the following can be displayed:

- **Scope note**: definition or comment by the thesaurus designer or manager specifying the usage of the descriptor term.
- *History note*: comment by the thesaurus designer or manager specifying how the term has changed at DIFFERENT STAGES in the development of the thesaurus.
- *Macro classification* [domain and/or microthesaurus which the term forms part of] and top term for the hierarchy the term belongs to, if it is not a top term itself (or list of its domains/microthesauri/top terms with a polyhierarchy).
- **Broader term** DIRECTLY superordinate to the particular term (or list of DIRECTLY superordinate broader termS with a polyhierarchy); the semantic environment of the broader term(s) can be accessed by hypertext link.
- **Narrower term(s)** DIRECTLY subordinate to the particular term; the semantic environment of the narrower term(s) can be accessed by hypertext link.
- **Related descriptor term(s)**: descriptor(s) with a related meaning, not generally belonging to the same hierarchy, which indicate to the user other concepts that may be employed; the semantic environment of the related term(s) can be accessed by hypertext link.
- **Synonym(s)**: terms used as entry points in a thesaurus which are cross-referenced to the relevant preferred terms by the thesaurus designer; the semantic environment of synonyms can be accessed by hypertext link.
- **Obsolete descriptor term(s)** the descriptor is linked to.



Figure 19 - Viewing the semantic environment of a descriptor term

<u>NOTE:</u> The semantic environment workspace enables you to position on the environment of another term present in this workspace via hypertext link, activated by clicking on the particular descriptor (or synonym).

3) With a SYNONYM, you will only be able to see its *preferred descriptor term* (or terms in the case of a complex concept defined by a combination of descriptors) in this workspace.

| 嶜 iD CinDoc Web - Thesaurus assistance - | - Microsoft Internet Explorer | |
|--|-------------------------------|--|
| Hierarchical List 💙 <u>Synchronize</u> Search: OK | 2 | <u>Options Semantic environment</u> Language: English 💙 |
| OOO1 HEALTH OOO2 ECONOMY OOO3 SCIENCES A AGRONOMY ASTRONOMY ASTRONOMY ASTRONOMY ASTRONOMY ACOUNTARCY ACOUNTARCY ACOUNTARCY ACOUNTARCY ACOUNTER SCIENCE ACOUNTER SCIENCE | Selected term PROGRAM | Used for term SOFTWARE |

Figure 20 - Viewing the semantic environment of a non-descriptor term

Synchronizing the Hierarchical List with the Current Descriptor Term

Click on the <u>Synchronize</u> link when you have positioned on a descriptor term via a hypertext link in the semantic environment workspace or through a direct search in the alphabetical or permuted list.

CinDoc enables you to synchronize the descriptor currently being viewed in the workspace to the right of the main window with the hierarchical list so as to avoid any time-consuming and complex searching through the different hierarchical levels.



<u>NOTE:</u> If the descriptor belongs to several hierarchies, it will be synchronized with the FIRST of these hierarchies.

Selecting the Descriptor Term(s) to Insert in the Query

When the assistance window is opened, the selection section at the bottom of the window will be empty.

SELECTING ITEMS

Terms can only be selected in one of the 3 thesaurus lists. You can only select ONE term at a time and the selected term can only be a DESCRIPTOR or a SYNONYM; click on a term to highlight it in one of the thesaurus lists then click on the **Add** button.



<u>NOTE:</u> Each term selected in a particular thesaurus <u>working language</u> will be systematically translated in the selection list according to the indexing language configured by the archive administrator/owner in the CinDoc Admin interface.

Descriptor(s) automatically inserted for the selected term (according to the configured settings, see $\frac{Viewing}{Changing}$ the selection settings of the thesaurus link) will be placed on a single line in the selection section of the assistance window (Figure 16).

<u>NOTE</u>: If you select a SYNONYM or an OBSOLETE DESCRIPTOR, its UPDATED DESCRIPTOR term will be inserted in the selection section instead. <u>When the synonym represents a complex</u> concept defined by a combination of descriptors, these descriptors will be placed on the same line and separated by + signs.

REMOVING SELECTED ITEMS

To remove an item from the selection section, click on the relevant line then click on the **Delete** button. ALL the terms in the selected line will be removed at once.



<u>NOTE</u>: With Microsoft Internet Explorer $\$ (versions 5.0 and later), you can also double-click on a particular line to remove it directly from the selection section.

To select several lines at once in the selection section, click on each of these lines while holding down the **Ctrl** or **Shift** keys then click on the **Delete** button as many times as required to delete each line one by one, beginning with the last selected line.

CONFIRMING AND CLOSING THE WINDOW

Closing the assistance window will save the current settings of the particular thesaurus on the workstation for the user's next session (size and position of window, active thesaurus list, semantic environment shown or hidden and active viewing language).

Click on **OK** in order to add the terms in the selection section to your query and close the assistance window. If the same term is present more than once, any repetitions will be automatically removed.

1 – In general:

When the selected terms are inserted into the query text box, they will be separated by the OR logical operator and placed in parenthesis.

In the example in <u>Figure 16</u>, confirming the following selection (with the forward slash as the item separator for the archive):

BIOLOGY/MEDECINE/BIOTECHNOLOGY

will create the following query for *field X*:

BIOLOGY OR BIOTECHNOLOGY OR MEDECINE

2 – In particular:

When a combination of terms is selected, 3 + signs one after the other will be placed between the descriptors; this symbol, used as a separator, will be replaced by the AND operator when the term is inserted in the query.

When you confirm the selection of the following combination (for the *BYZANTIUM* concept): *ISTANBUL*+++ANTIQUITY

will create the following query for *field X*:

ISTANBUL AND ANTIQUITY

Changing the Working Language of a Multilingual Thesaurus

With a multilingual thesaurus and when the thesaurus link administrator has configured several languages, a drop-down list will be displayed to the right of the assistance window enabling you to select an appropriate working language to search and view the semantic and hierarchical environment of a concept.



<u>NOTE:</u> The choice of working language will not prevent the selected terms from being systematically translated into the indexing language configured by the administrator according to the field contents.

Any change in the working language will be saved on the workstation for future sessions for the current thesaurus and particular connected user. This will be automatically selected over the default working language which is the same as the indexing language.

G Viewing/Changing the Selection Settings of the Thesaurus Link

Click on the **<u>Options</u>** link; a dialog box will be displayed enabling you to view and modify (provided you have the required permissions) the default term selection settings for the current session.

| iD CinDoc Web - Microsoft Internet Explorer | |
|--|-----------|
| Auto-insertion of broader terms: none , narrower terms none Extend search to related terms: Yes Extend search to historical equivalents: Yes | OK Cancel |

Figure 21 – Dialog box for viewing the query assistance by thesaurus link settings

ATTENTION: A CinDoc query cannot exceed 500 characters. This limit can be reached if a descriptor is selected for which numerous terms are inserted automatically or when the final query is submitted; in both cases, CinDoc WEB will display a message in order for you to modify your selection by removing the selected items directly or defining the settings more specifically (if authorized by the archive administrator/owner).

There are 2 sets of selection settings for querying:

- Auto-insertion settings for the hierarchical levels starting from the selected term
- Settings which extend the query to related terms and historical equivalents

THE MORE SETTINGS AND HIERARCHICAL LEVELS YOU SELECT, THE BROADER YOUR QUERY WILL BE AND THE LESS RELEVANT THE RESULTS WITH REGARD TO THE ORIGINAL CONCEPT; HOWEVER, PROVIDED THE CINDOC QUERY CHARACTER LIMIT IS NOT REACHED, YOU WILL BE SURE TO RETRIEVE ALL RESULTS OF ANY RELEVANCE.

1) AUTO-INSERTING HIERARCHICAL TERMS

- Activating auto-insertion of **Broader** terms will automatically insert the selected descriptor AND its broader term(s) into the selection list, depending on the number of superordinate levels requested and the position of the descriptor in the hierarchy.
- Activating auto-insertion of *Marrower* terms will automatically insert the selected descriptor AND its narrower term(s) into the selection list, depending on the number of subordinate levels requested and the position of the descriptor in the hierarchy.

The set of narrower and/or broader terms automatically inserted for the selected descriptor will be placed on a single line, in order of the hierarchy, with each term separated by the item separator character for the archive. The selected descriptor will be inserted in its hierarchical position.



<u>NOTE</u>: When all the superordinate levels are requested, if one of the terms belongs to another hierarchy (with polyhierarchical thesauri), this hierarchy will also be included; each hierarchy will then be displayed on a separate line.

Choosing both auto-insertion options together with numerous levels increases the likelihood of reaching the CinDoc query character limit.

2) EXTENDING THE QUERY TO RELATED TERMS OF THE SELECTED DESCRIPTOR

Activating this option enables the selected descriptor AND any of its related terms to be automatically inserted in the selection list; all the terms will be inserted on a single line and separated by the item separator character for the archive.

3) EXTENDING THE QUERY TO HISTORICAL EQUIVALENTS OF THE SELECTED DESCRIPTOR

Activating this option enables the selected descriptor AND any of its historically equivalent descriptor terms (or obsolete descriptors) to be automatically inserted in the selection list. All the terms will be inserted on a single line and separated by the item separator character for the archive.

The query will therefore be extended to any descriptor terms representing the SAME concept but which have since been modified in the thesaurus. This option is useful with archives that have been created a certain time ago and whose indexes have voluntarily not been updated by the archive owner.



CinDoc WEB enables the Web administrator 4 options for displaying relevant binder and archived document information:

- List View
- <u>Tile View</u>
- Detailed view with browsing from binder to binder
- Detailed view of document information per document

Viewing Binders in an Archive in List View

This screen offers an overview of query results involving binder data. Depending on the settings configured by the Web administrator, List view is automatically activated after a binder query and manually from the <u>List View</u> link, if displayed in the side menu to the left of your CinDoc WEB page.

The middle section of this screen provides an overview of several binders at once (by default, 5 per page, but this figure is modifiable). The content displayed per binder depends on the fields selected for this purpose by the CinDoc WEB administrator. Each binder is displayed on a separate line and the total number of binders to view is indicated on the top left of the screen, along with the query description. With EDM-activated archives, the

administrator can configure the display of 2 additional columns: undicating the number of EDM folders linked to the binder, and *Documents* column, which displays the <u>thumbnail</u> (or icon) of the first document in the first folder (or the thumbnails of all the documents in each of the folders).



Figure 22 – CinDoc WEB List View screen for viewing the list of binder

Direct searching hypertext link configured for the field



<u>NOTE:</u> For system performance reasons, ONLY THE FIRST 100 BINDERS will be listed; this setting (MAXROW parameter) can be modified by your CinDoc Web administrator. Whatever the binder display limit, CinDoc Web will inform you when it is reached.

In the example in Figure 22, List View displays 5 binders per page and the first binder has 3 EDM folders linked to it with the first document in the first folder displayed.

Browsing through List View Data

To browse through the binders in the list, proceed as follows:

- To view binders on a particular List view page, use the vertical/horizontal scrollbar in your browser window. These will be displayed depending on the number of binders and their field contents.
- You can also browse through the pages using the **First**, **Previous**, **Next** and **Last** links.

[See Figure 22]

Changing the Binder List Display Order

If no sort is applied, binders are displayed in ASCENDING order of the access keys or results set order numbers.

When the sort option has been configured by the Web administrator, you can simply click on the name or description of the fields displayed as hypertext links in the List view table header; the original list of binders will then be automatically sorted in alphabetical order of the index keys located for these binders. The active sort order will be indicated in the header of the selected column: the \triangle symbol indicates ascending order and the ∇ symbol descending order.



Figure 23 – Example of a sorted binder list in CinDoc Web

In the above figure, the binders have been sorted in ascending order of the contents of the *Document author* field.

If the Web administrator has configured **server** sorting (as opposed to **client** sorting), when the sort field is empty in a particular binder, the binder will not be displayed in the newly sorted list.

Unless otherwise configured by the Web administrator, when the sort field is multi-item with **server** type sorting, the items will be scattered and EACH item will then be used for the sort: a binder which contains several items in the chosen sort field will therefore appear in the newly sorted list as many times as there are items in this field, in the sort order of these particular items. If **client** sorting has been configured, however, field contents will be treated as a whole and sorted in order of their initial letters.

For each of the lists sorted according to a different field, the same number of binders will not necessarily be displayed but all will belong to the original list of binders.

Performing Operations on Data in List View

VIEWING A BINDER IN DETAIL FOR THE CURRENT PAGE

Click on the selected binder. The particular binder will then be displayed in detail.

SEARCHING DIRECTLY USING INFORMATION CONTAINED IN A BINDER

The items in each of the indexed fields configured by the Web administrator can appear as hypertext links, enabling you to search the archive directly for binders containing the exact item you click on (without going into the <u>query</u> menus and screens). A new set of binder results will then be displayed in List View.

MARKING DATA

You can create and save a random selection of binders/documents for later use:

- 1. To select an item, check the box to the left of it on each particular page.
- Then click on the selection button. CinDoc WEB will then temporarily save the binders/documents you have checked on the various pages. The <u>Selection</u> link in the side menu to the left of the screen will indicate how many items have been selected (in parenthesis).

RETRIEVING SELECTED DATA

You can download selected binders and their linked documents onto your workstation from the CinDoc server:

- 1. Select these items by checking their checkboxes; selected items will be saved for each page you view.
- 2. Then click on the appropriate command on the top right of the page:
 - It is a selected binder data.
 - to retrieve the Word file of the selected binder data.
 - Ito retrieve the compressed file containing the selected documents.



<u>NOTE:</u> All the items (binders/documents) in the archive selected for marking or data retrieval will be saved for the entire session.

Depending on the configured settings, the **Select all** and **Unselect all** links may only concern items in the active page.

PRINTING SELECTED DATA

You can print (¹ command) data in the binders you have selected in List View.

[See Figure 22]

Viewing a Binder in Detail

The detailed binder display screen offers you a detailed view of all the data accessible after adding a binder (<u>Figure 35</u>) or submitting a query in the List view window (<u>Figure 22</u>). This screen also enables you to browse through all the archived document folders linked to the binder and all the folder versions (if configured).

The order number of the binder in the original list is indicated to the left of the header in this screen; navigation buttons are available in the header for browsing through this list.

The main section displays the full binder details, field per field, according to the settings configured by the Web administrator. The first column indicates the name or description of the selected fields while their contents are displayed in the second column.

Each archived document folder linked to the binder can be presented below the binder in a specific section: the folder is identified by its description and archiving date. The documents it contains are displayed in the form of <u>thumbnails</u> depicting their contents; below each of them, the original document name and size (in kilobytes) is displayed.



Figure 24 – Detailed binder display according to the configured fields

In the example in the above figure, detailed binder display consists of 6 fields, 1 of which is configured for <u>direct searching</u> by hypertext link; this binder is linked to a folder containing one image document.

Browsing through the Details of Each Binder in List View

Using the **I** avigation commands situated on the top right of each detailed display page, you can view the details of each binder in the original List (sorted or unsorted) without having to switch back to the screen depicting this list:

- Will show the details of the first binder in the original list
- Will show the details of the binder before the current one in the list
- Will show the details of the binder after the current one in the list
- Will show the details of the last binder in the original list

Using these commands will have no effect if the list only consists of one binder.

Displaying the Different Versions of an Archived Document Folder

By default, ONLY the latest version of an archived folder is displayed. To automatically display ALL the existing versions of a folder in the detailed binder display screen, click on the <u>Old versions</u> link at the bottom of this window for the particular folder (if configured). The different versions of a particular folder will be displayed from the most recent to the oldest; the different folder versions are assigned a code from 1 to n, with 1 being the oldest version.



<u>NOTE:</u> You may find that the number of the current version does not correspond to the total number of versions (i.e. there appear to be fewer versions than the apparent total): this indicates that at least one older version has been deleted.



Figure 25 - Detailed binder display enabling the previous versions of an EDM folder to be viewed

In the example in the above figure, 2 document folders are linked to the current binder (EDM numbers 33 and 58). The first folder named *Tornado information and map* containing 3 documents has 2 previous versions you may view: the most recent (version 7) contains 2 documents; the oldest version (version 5) contains 1 document.

[See Figure 24]

Performing Operations on Current Data

Using the command buttons situated on the top right of the detailed display page, you can perform the following operations:

- Temporarily <u>mark</u> (^X command) the binder (and ALL its documents) for subsequent use in the active selection.
- <u>Send by e-mail</u> (^{IM} command) and <u>print</u> (^{IM} command) data in the current binder (and/or its documents).

Depending on your <u>CinDoc rights</u> to the archive and the CinDoc WEB connection settings, you can manage data individually: <u>modify</u> the binder (\checkmark command), <u>duplicate</u> the data in the current binder in the archive (🖻 command) or <u>delete</u> the current binder (🕅 command).

[See Figure 24]

Browsing through Related Archives: Viewing Linked Binders

A relation is a link based on a common value between *2 fields in 2 CinDoc archives* where the master archive (with its linking field) accesses the slave, linked archive (with its target field). *The master and slave relationship can be between separate archives or within the same one*.



<u>NOTE:</u> A single master archive can have several relations to other archives and itself be a slave archive to other master archives.

Viewing a Relation

If configured by the Web administrator, the detailed Binder and Document pages enable you to view any links that may exist between the different archives you are authorized to access in CinDoc WEB. If any links exist between binders, a hypertext link will be displayed in the linking field of the master archive in the relation.



ToolTip for the relation

The total number of binders linked to the current binder will be indicated in parenthesis to the right of the "linked binders" link in the linking field. Should a particular binder in the target archive configured for a relation contain more than one common value with the linking binder, it will only be counted ONCE.

A tooltip will display the main information on this relation as follows: *Linking field->Target archive.Target field*

Viewing Linked Binders

When you click on the <u>Linked binders</u> link when viewing a binder in detail in the master archive, CinDoc WEB will display this set of binders in List View in the target archive, as shown in the figure below:

| | Reminder o linl | f numbe king bin | er of bin der in th | ders linked to the Master arc | o the chive | CodPers ta | rget field | in the N | lamPers s | lave archive | |
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| | 🛃 iD CinDoc Web - M | icrosoft l | nternet E | cplorer | | | | | | | × |
| | Elle Edit View Favorites Iools Help | | | | | | | | | | |
| | Address 🕘 http://anglotrad/cind web/ | | | | | | | | 50 | | |
| Command for switching back to the original | Cine Archives | COM [°] | Organi: search distribu me code | ee, and te structured da descriptions Linked Binders | and documents | | | Lis Y BI | at View | | () |
| Master | Multiple Archive | Select | all - Dese | ect all | | _ | | | | | - |
| archive | Search Assisted Query | (31) | | REF | Sumame | First Name | Coc | Pers | Intle | | |
| | Expert Query List View | | | 00005 | ANDREOTTI | Philippa | DAN | | Mr. | | |
| | <u>Tile</u> <u>Selection</u> | a | | 00004 | ROMAIN | Didier | DRO | | Mr. | | |
| | • Add | Q | | 00003 | СНАТОЦ | Virginia | vсн | | Ms. | | |
| | • End session | | | | First - Previou | is - Next - Last | · | | : | | • |

Figure 27 – List View displaying linked binders

The target archive will then become the new current archive and the field headers or long field names configured for this archive will therefore be displayed in List View. To view a particular linked binder in detail, proceed as normal by clicking on the subtron; any other available commands (search functions, adding binders, etc.) will be applied to the target archive.



<u>NOTE</u>: You can switch back to the master archive at any time by clicking on the new **Master archive** link displayed in the side menu to the left of the target archive page.

Viewing Archived Documents in Tile Form

This screen enables you to view query results with priority given to displaying documents, which may be relevant documents in themselves or documents linked to relevant binders. Depending on the settings configured by the Web administrator, Tile view is displayed automatically after a query and manually from the **<u>Tile</u>** link, if displayed in the side menu to the left of your CinDoc WEB page.

The middle section of this screen displays thumbnails of archived document folders linked to binders in tile form (the number of thumbnails per page can be configured; default 4 with minimum of 2 thumbnails horizontally). The total number of documents displayed is indicated in the submitted query with their order numbers displayed to the right of each thumbnail.

Certain main fields selected by the CinDoc WEB administrator can also be displayed in this screen. Binder information is displayed line per line to the right of each document thumbnail. The same binder information can therefore be displayed as many times are there are documents linked to this binder.



<u>NOTE:</u> For performance reasons, ONLY THE DOCUMENTS LINKED TO THE FIRST 100 BINDERS are displayed by default; this limit (MAXROW parameter) can be modified by your CinDoc Web administrator.

In the example in the above figure, the tile is configured to display binder information and enable direct searching by hypertext link.

The last three documents in this example are linked to the same binder (reference 000029).

Browsing through Tile Data

- To browse through a particular page, use the vertical/horizontal scrollbar in your browser window. These will be displayed depending on the number of documents and the field contents.
- You can also browse through the pages using the **<u>First</u>**, **<u>Previous</u>**, **<u>Next</u>** and <u>Last</u> links.

[See Figure 28]

Performing Operations on Tile Data

The operations available for data in Tile view are carried out in a similar way to those described for List view, particularly <u>direct searching</u> by hypertext link, <u>marking documents</u> and <u>retrieving data</u>.

To view <u>detailed</u> information on the document in the current page, simply click on the simply glass for the particular document. To view a document directly, simply click on its <u>thumbnail</u>.

To print the tile of previously selected documents, click on the 🦉 printing command button.

[See Figure 28]

Viewing Detailed Information on a Document

A specific screen enables you to view the detailed information assigned to a document per individual document; depending on the settings configured by the administrator for the archive, this information can be accessed after confirming adding a binder with archived documents (Figure 35) or after a query viewed in Tile form (Figure 28).

The order of the document in the original tile is indicated to the left of the header in this screen; navigation buttons are available in the header for browsing from document to document. A <u>thumbnail</u> containing all the document details (file name and size) is displayed at the top of the page with the details in all the main fields of its linked binder displayed line by line below. The first column indicates the name or description of the selected fields with their contents displayed in the second column.

An additional section, configurable by the Web administrator, is displayed at the bottom of the page, enabling the image document to be displayed (if it is in JPEG, GIF or PNG format).



Direct searching hypertext link configured for the field

Figure 29 - Screen displaying detailed information on a document

In the above figure, the page shows the second document in the tile: this is a JPEG image file with binder details from 4 fields, 1 of which is configured for <u>direct searching</u> via hypertext link. You can <u>perform operations</u> on the current document and its linked binder using the command buttons situated on the top right of the detailed display page.

Opening a Document to View It

To view the contents of a document (image or office document) in a folder, simply click on its <u>thumbnail</u>. EDM documents are viewed in a separate window specific to the Web browser installed on your workstation. JPEG and GIF display formats are supported by most browsers.

IF YOU HAVE PROBLEMS VIEWING a particular image document or office file (i.e. originating from a word processing or spreadsheet package) on your workstation, you will either need the CinDoc WEB administrator to add the relevant plug-in or ActiveX technology to increase your browser's viewing capacity or install software that supports this particular file format on your machine.

MANAGING DATA SELECTIONS



This function enables you to select (or deselect) any data (binders and all types of archived documents) retrieved when browsing through binders and folders in an archive and save this data in selection directories for future use. These selection directories will be saved on the Web server and retained for future CinDoc sessions. Individual selection directories can contain data originating from different EDM archives (multiple-archive selection).

Data selections are specific to the CinDoc users who create them.

Retrieving the List of Data in a Selection

Click on the <u>Selection</u> link if displayed in the side menu to the left of the CinDoc WEB screen. The selection screen displays the previously selected items (documents and binders):

- A binder with no attached documents, selected in List view or in detailed binder display: the selection displays 1 item for this binder.
- A binder with attached documents, selected in List view or in detailed binder display: as many items as there are documents linked to this binder are displayed in the selection.
- A document and its linked binder, selected in Tile view or detailed document display: the selection displays 1 item for this document and its binder.

Items are displayed horizontally in each page of the selection as <u>thumbnails</u> for documents (by default, 4 documents per page) with the main binder details displayed to the right. These details are configured by the Web administrator specifically for each archive, thereby enabling you to distinguish the items in each archive more easily should your selection be taken from several archives. Title of the current selection with number of items it contains



Figure 30 – Document selection page showing tiled documents

The name and size of the underlying document file (in a tooltip) together with a selection checkbox (for performing operations on these documents in the selection) will be displayed for each thumbnail.



<u>NOTE:</u> By default, CinDoc WEB displays the following in your selection page: - A thumbnail marked with a red cross for all documents that no longer exist in the particular CinDoc archive.

- "Binder deleted" in red for all binders that have been deleted from the CinDoc archive.

Managing the Current Selection

The name of the current selection is displayed in the header of the selection page. With each new CinDoc WEB session, a new temporary active selection will be created. To activate an existing selection saved earlier, simply select it in the drop-down list of selection pages.

SAVING A SELECTION

You can create and manage an unlimited number of selection directories. These enable you to create distinct sets of documents or binders, save them for later sessions and use them from any CinDoc WEB client workstation.

When the current selection is a [New selection] not yet saved on the Web server:

Click on the 🐱 Save selection button on the top right of the selection page. A dialog box that depends on your Web browser will then be displayed, prompting you to enter a new, more specific name for this selection and save it for later sessions. Any newly saved selection is automatically activated.

ATTENTION: This name must not contain the following unauthorized characters: $\backslash / : * ? < > |$ and is restricted to **50** characters.

DELETING A SELECTION

When you no longer need to keep a particular document selection, you can delete it permanently from the Web server.

Click on the Delete selection button on the top right of the selection page. A confirmation request will be displayed. After confirmation, the selection will be deleted from the server and removed from the list.

[See Figure 30]

Using Data in a Selection

You can perform a range of operations on the items in a selection from their thumbnails (or carry out <u>direct searches</u> by hypertext link on binder data, if configured); any changes to the contents of a selection will be systematically saved for this selection on the Web server.

Besides the functions available in your Web browser, accessed by right-clicking on a particular document thumbnail (saving to disk, <u>printing the document</u>) or clicking once on a thumbnail to <u>view</u> it in a separate window, additional CinDoc WEB functions described below are also available.

Before activating these functions, you must select the desired items by checking their respective checkboxes. Depending on the configured settings, the <u>Select all</u> and <u>Unselect all</u> links may only concern items in the active page. The following operations can be performed:

DELETING A SELECTED ITEM

Click on the \bowtie Delete button on the top right of the selection page to delete the selected document or binder. This will be directly removed from the selection after confirmation. A message will be displayed informing you of the results of this operation. This function can prove very useful for removing items in your selection that no longer exist in the particular CinDoc archives.

COPYING A SELECTED ITEM TO ANOTHER SELECTION

Select the target selection directory in the *Copy to* drop-down list then click on the **b** Copy command. A particular selection cannot contain more than one copy of the same archived document or binder with no linked documents. A message will be displayed informing you of the results of this operation.



<u>NOTE</u>: You can add a selected document to a new selection by choosing [New selection] in the drop-down list. Your Web browser will then display a dialog box enabling you to enter the new name for your selection.

RETRIEVING SELECTED DATA

You can download and retrieve binder data and archived documents selected in the selection screen onto your workstation by clicking on the appropriate command on the top right of the selection page:

- b to retrieve the text file of the selected binder data.
- 🎽 to retrieve the Word file of the selected binder data.
- *b* to <u>retrieve the compressed file</u> containing the selected documents.

PRINTING SELECTED DATA

You can print (¹ command) data you have selected previously in the selection screen.

[See Figure 30]

PRINTING/SENDING BY E-MAIL/ DOWNLOADING DATA



CinDoc WEB enables you to print binders you are currently viewing and documents displayed via your Web browser (provided your browser version enables printing). You can also send data by e-mail via CinDoc WEB if your workstation has a mail server connection.

Printing Binders and their Linked Folders

- Using the print function in the pop-up menu that depends on your Web browser (accessed by right-clicking in the current page), you can print the entire page or a previously selected section of it.
- Alternatively, click on the CinDoc WEB printing command button in the detailed binder/document display pages as well as the List View, Tile and Document Selection pages (provided you have selected data beforehand). CinDoc WEB will then load the binder (and attached archived document) data in a separate window as it will appear when printed, which depends on the screen the Print command was selected from.



<u>NOTE:</u> Depending on your print settings, certain data displayed may not be printed, and vice-versa.



Figure 31 – Example of single binder printout format in CinDoc WEB

The Print dialog box for your particular printer driver will also be displayed enabling you to select the appropriate printer and printing options.

Printing a Document

Note that this function requires you to have software capable of processing the particular document format installed on your workstation.

You can print a document in two ways:

- Right-click on its <u>thumbnail</u> then select the print function in the pop-up menu displayed in your browser window.
- When viewing the document in an external window displayed by your Web browser, select the print function in the main menu or toolbars.

The Print dialog box for your particular printer driver will then be displayed enabling you to select the appropriate printer and printing options.

If you have problems printing a particular picture document or office file (i.e. originating from a word processing or spreadsheet package) from your workstation, you will either need to ask the **CinDoc WEB administrator** to add the relevant plug-in or ActiveX technology to your machine so as to increase your browser's viewing capacity, or install software that supports this particular file format on your machine.

Sending CinDoc Data to be Viewed Directly

If you wish to send data to someone who does not have CinDoc, you can send them the information in the binder you are currently viewing in the active archive via e-mail.

Sending Data by E-mail

Click on the Send E-mail button in the <u>detailed binder display</u> or <u>detailed document display</u> pages. The send form will then be displayed:



Figure 32 - Form for sending a binder and its linked archived documents by e-mail

You must then enter the recipient's address or addresses, each separated by a semi-colon. You can also enter your full name and add a specific message if you wish to.

An option enables you to choose to send only the data in the current binder or send this data together with all its associated documents: each document will be sent as an attached file. If you choose to send documents, make sure they are not too large so as not to overload your network.

Receiving Data by E-mail

By default, data sent via CinDoc WEB will appear in your inbox as a message with a [CinDoc Web] subject.



Figure 33 – Example of a binder and linked document e-mail reception form

In the message body, the data from the original detailed binder display is presented in standard CinDoc format: name of field (or field description/long field name) in the archive followed by its contents.

The names of the associated EDM folders, if any, are indicated next; the folder names are followed by their EDM numbers (in parenthesis). The name(s) of the documents making up the folder will appear attached to the message and can be opened automatically with a double click provided your workstation has the appropriate file association registered.

Downloading CinDoc Data

CinDoc WEB enables you to download CinDoc binder data and archived documents, selected in the <u>Selection</u>, <u>List View</u> and <u>Tile</u> pages, into files from the server to your Web client workstation. This function enables you to revise data and format it outside of CinDoc for specific purposes.

Exporting Selected Binder Data

Click on the binder export command:

- As a text file 🏙, or
- 🛛 In Microsoft Word format 🏙

The data from the selected binders will be exported according to the settings configured by the Web administrator for the particular fields and the format of the results file, which you can either save directly on your workstation or open in the configured viewer.

By default, the text file is named *exporttxt.csv* and can be opened in Excel type spreadsheets and the Word file is named *exportword.doc*.

| 🗿 http:// | anglotrad/cindocweb/TemporaryFiles/t5 | 6/DL_026587/exportword.doc - Microsof | t Internet Explorer | | | | | |
|-----------|--|---|--|--------------------|--|--|--|--|
| Eile Eo | lit <u>V</u> iew Insert F <u>o</u> rmat <u>T</u> ools T <u>a</u> ble Tr | ado <u>s M</u> ultiTerm G <u>o</u> To F <u>a</u> vorites <u>H</u> elp | | | | | | |
| Address | Address 🕘 http://anglotrad/cindocweb/TemporaryFiles/t56/DL_026587/exportword.doc 🛛 🖌 🄁 Go | | | | | | | |
| 8.1.17 | ☆ | | | | | | | |
| ŧ | | | | | | | | |
| REF | Author | Source | Title | Language | | | | |
| 000043 | TURNER, L. | NSSDC | View of Saturn | English | | | | |
| 000027 | TECHGUIDE.COM | HTTP:/WWW.TECHGUIDE.COM | Document management glossary of terms | English | | | | |
| 000029 | TARRAS-WAHLBERG, N / STENHAGEN, G / LARKŌ, O / ROSÉN, A / WENNBERG, A / WENNERSTRÖM, O. | JOURNAL OF INVESTIGATIVE DERMATOLOGY | Changes in ultraviolet absorption of sunscreens after ultraviolet radiation | English | | | | |
| 000014 | ROWLING, F. | CLIENT | Production printing | English / Dutch | | | | |
| 000023 | ROBERTSON, J. | DOCUMENT WORLD | Document Management and ERP | English | | | | |
| ≡ 6 8 3 |](| | | • | | | | |

Figure 34 - Example of a set of binders exported in Microsoft Word format

The file created will contain a header indicating the exported data (fields in the archive or descriptions of these fields). By default, the selected binders are added line by line and each item of information in them will be separated by a specific character configured by the administrator for the particular CinDoc archive.

Exporting Selected Documents

Click on the 🏙 document download command.

For improved performance, a compressed file will be created (by default, *archive.tar*) containing all the selected document files; the compression format and the file name can be modified by the Web administrator according to the installed programs to ensure the appropriate decompression software can be used to open the results file.

MANAGING BINDER DATA



Users' ability to manage binder data depends on their <u>access rights</u> for the particular archive and their <u>connection mode</u>. In CinDoc WEB, only one binder can be managed at a time.

Adding a New Binder (Standard Mode)

Depending on how the current archive has been configured, the binder addition function is accessed by clicking on the <u>Add</u> link in the side menu to the left of the main page.



<u>NOTE</u>: When dynamic input masks have been preconfigured for a CinDoc archive, the **Add** link is replaced by the *New* option which lists each of the values for the object types to be described (see Figure 37).

The standard input screen (and archiving if you are an archivist for the archive) contains ALL the fields in the binder, or particular fields configured by the Web administrator, in the upper section of the screen. The actual binder will be empty or only contain default input values. Depending on the Web administrator's settings, specific explanations can be inserted in the Add page above particular text boxes, as in the figure below.

The archiving section in the lower part of the screen will be described in § <u>Acquiring and Archiving</u> a New Document Folder.

| | 🗿 iD CinDoc Web - N | Aicrosoft Internet Explorer | | | | |
|------------------------------------|--|--|---|-----------------------------|--------|---------------------------------|
| | File Edit View Fav | vorites Tools Help | | | | |
| | Address 🕘 http://anglo | trad/cindocweb/ | | | 🗙 ᠫ Go | |
| | Cinco | Organize, search and distribute structured | I data and documents | | | |
| Configured | 1 | Search Industry artic | | Add | | Command for |
| section | • Archives | | | | - / | canceling the |
| ToolTip listing the field input | Home Multiple Archive Search Assisted Ouerv Expert Querv Selection | Document author Multi-Rem Separator / Uppercase | Enter the author's name here 2 ollowed by the document source | | | Field input |
| Grandotoriotios | • <u>Add</u> • <u>End session</u> | Document title * | Title of document | | | command |
| | | Number of pages | Number of pages ? | | | |
| User's option to activate or | | Abstract | Lastly | | | |
| | | Activate field controls | | | | |
| validation | | Û. | | | | |
| | | Folder label | New folder (Fiona) | | | Commands for |
| Document folder | | Documents | Next document | OK Clear | | confirming the current addition |
| archiving | | | | | | and clearing the |
| section for the current binder | javascript:ClickInforma | ations() | | Second Second Second Second | et 🥫 | latest values entered |

Figure 35 – Binder input (and archiving) screen in CinDoc WEB

As with all the CinDoc WEB screens, there is a side menu enabling you to perform an operation by clicking on the appropriate link. Performing any other operation will automatically cancel the current input; the same applies if you carry out a simple search in the header of this screen or if you click on the X button at the top of the page.



<u>NOTE:</u> If the CinDoc archive is configured with <u>security settings</u>, you will be able to define these settings in specific text boxes (see <u>Figure 56</u>).

Defining the Binder Access Key

If the Numeric access key input section is displayed, it will indicate *auto>*: the access key will be generated automatically by the program. This is to prevent different users from entering the same access key for a binder. When the binder is applied (**OK** button situated at the bottom of the binder input screen), the access key assigned will generally be incremented by one (depending on the increment configured for the particular archive).



<u>NOTE:</u> You can always enter a particular numeric value directly in the access key text box, provided this value is not already used in the archive.

With alphanumeric (User) numbering, you will need to assign an access key to the binder yourself (the access key input section will be empty by default).

[See Figure 35]

[©] Viewing the Characteristics of the Fields to be Input

Roll the mouse over the relevant field name or description – a tooltip will then be displayed indicating its characteristics: type, format, REQUIRED property and item separator for the archive.

In addition to the reference field (access key), and depending on the structure of the particular archive, you can have up to 6 types of fields that can be input:

FREE FORM TYPE

These are fields which are likely to contain only text in any format. They are used mainly for viewing purposes, such as for a summary field.

SINGLE OR MULTI-ITEM TYPE

These fields are intended mainly for querying where items as a concept are essential, for example author or keyword fields for documents.

Unlike a multi-item field, a single-item field can only contain ONE value. The different values in a multi-item field will be separated by the item separator defined by the archive administrator. Input aids and controls are often assigned to this type of field.

DATE TYPE

These fields are designed to contain one or more uniform items specifically formatted to match the current date settings. When a date field contains several date values (same format), these will be separated by the item separator defined for the archive.

CinDoc will automatically verify that the correct format is used for these values.

NUMERIC TYPE

These fields are designed to contain ONE item of formatted numeric data, which will be verified, to which a unit can be added at the end of the field if desired.

LINK TYPE

Link type fields are used to set up a link between a CinDoc binder and various other types of documents, which can be accessed via this binder in a CinDoc Windows client.

The GED_LNK field is used exclusively to store the numbers of the document folders linked to the current binder. This field is therefore read-only; it will be automatically updated when you archive a new document folder, irrespective of whether you are in binder addition or modification mode.

BOOLEAN TYPE

A Boolean type field can contain one value out of a possible two values predefined by the archive administrator. <u>Example</u>: Yes/No



<u>NOTE</u>: Required fields will be displayed with an asterisk * to the right of their names; this property does not concern Boolean or office link type fields.

[See Figure 35]

Inputting Fields

To enter data in a particular field, proceed as follows:

- Click in the text box of the field. You can input data in whatever order you like and leave fields blank should you wish to.
 - ATTENTION: Certain fields may only be input using the input assistance tools configured for them, such as closed vocabulary index controls, default values that you may or may not be able to change, or drop-down lists of values, e.g. Booleans fields.
- Click on the content be activate the input assistance configured for the field and made available by the archive creator/owner. These aids ensure uniformity and speed up data input. <u>Input aids</u> can be in the form of indexes, simple lists, hierarchical lists or thesaurus links.

[See Figure 35]

Controls Performed when a Binder is Applied

Input controls can also have been configured for the archive. These controls are carried out when the binder is applied (OK button). The following elements are verified:

- Fields configured to contain a single value (single-item fields)
- Required input fields, and their contents.
- The format of numeric and date fields.

CinDoc will display an error message if it detects any inconsistencies, i.e. when the archive controls have been ignored. You will not be able to apply the binder input unless you correct these errors. The offending fields will be displayed with a different background color and when you roll the mouse over the field name(s), a tooltip will be displayed explaining the error in red:

| | | Date | | |
|---|---|---------------------------|-----|---|
| | Date | 12/10/20 | 004 | |
| ĸ | Date Separato Format YYYY Don't add extr | r / .MM.DD :a zeros | | - |

Figure 36 – Example of a tooltip indicating a field input error

| 1000 | - |
|-------|-------|
| | - |
| 1 A A | 100 C |

<u>NOTE</u>: Depending on the settings configured by the Web administrator, input controls may have been automatically deactivated or, on the contrary, automatically activated (in which case you will have to abide by the input restrictions). Binder creators may also be given the choice to activate these controls or not: the *Activate field controls* checkbox will then be displayed at the bottom of the field input section and you will be able to bypass the controls for this binder by unchecking this box.

Once the binder has been added to the archive, CinDoc WEB will either switch to a new binder for input (default) or present the newly created binder in one of the 4 display modes (depending on the configured settings).

[See Figure 35]

Adding a New Binder Using a Dynamic Mask

If configured by the archive owner, this function enables you to have a set of fields (input mask) specific to the type of object being described to be displayed automatically in the Add page.

D

NOTE: All binder creators in the same connection profile access the same CinDoc WEB individual binder addition screen. When input masks have been configured for the archive, creators will have access to the same preconfigured masks.

| Book | × |
|------------|--|
| Book | |
| Periodical | |
| CD-ROM | N. Contraction of the second s |
| Мар | 74 |
| Microfiche | v |
| Multimedia | |

Figure 37 – Drop-down list of the different values for which masks have been preconfigured in the archive

To enable the CinDoc WEB interface to display the appropriate fields dynamically for the new binder you are adding, you will first need to select a preconfigured value describing the type of data. This value is selected from the drop-down list to the right of the field for which mask(s) have been configured.

The upper section of the Binder addition screen (and archiving, if you are an archivist for the archive) will display the fields that have been preconfigured in the mask for the type of data being described. Except for the field containing the selected type of data, the new binder will be empty or only display default values that may have been configured.

The archiving section in the lower part of the screen will be described in § <u>Acquiring and Archiving</u> a New Document Folder.
| Din CinDoc Web - M File Edit View Fav Address Address http://anglo | Nicrosoft Internet Explorer Vorites Tools Help trad/cindocweb/ | | | | - D A | 7 |
|--|---|--------------------------|---|----------------|-------|-----------------|
| Cincor | Organize, search and distribute structured d | ata and documents | | No Contraction | | ^ |
| 1 | Demonstration Medi | a Library | | Add | | |
| Archives Home | | | | × | | |
| Assisted Query Expert Query | Type of media * | CD-ROM Book | × | | | Preconfigured |
| • Selection | Description of media | CD-ROM Map | 2 | | | mask (6 fields) |
| Add End session | Location in library | Microfiche Multimedia | | ? | | CD-ROM object |
| | Field of application | | | ? | | |
| | Date of publication | | | | | |
| | Descriptors | | | 2 | | |
| | 🗹 Activate field controls | | | | | |
| | Û | | | | | |
| | Folder label | New folder (Fiona) | | | | |
| | Documents | Next document | | Browse | | |
| | | | | OK Clear | | V |
| ど Done | | | | Second Intra | anet | |

Figure 38 – Example of a dynamic binder input mask (with archiving)



<u>NOTE:</u>

In binder addition mode, the dynamic mask displayed depends on the selected object type. If you do not wish to describe this object, you will have to cancel the input (**X** cancel button) then select the link for a different object in the side menu.

Field input and controls function in the same way as described in §Adding a New Binder (Standard Mode).

[See Figure 43]

Modifying a Binder

To access this function, switch to <u>detailed binder display</u> or <u>detailed document display</u>, then click on the modification button at the top of the page (available depending on your <u>CinDoc rights</u> to the archive). You will then switch to individual binder modification mode for the archive.



<u>NOTE:</u> If other users attempt to modify the same binder at the same time as you, they will obtain an error message indicating that they are denied write access to the binder, i.e. the binder will be LOCKED. They will continue to be denied access until you exit modification mode for this binder by applying or canceling your changes.

A modify screen (and archiving/folder revision if you are an archivist for the archive) is then displayed. By default, this contains ALL the fields in the binder or the particular fields specifically configured by the Web administrator or present in the preconfigured mask. Depending on the Web administrator's settings, specific explanations can be inserted in the Modify page above each text box, which is not the case in the figure below. The section for archiving/modifying EDM folders linked to the current binder is described in §.

| | iD CinDoc Web - N | Aicrosoft Internet Explorer | | | | |
|---|---|-------------------------------------|--|------------------|----|--|
| | Address 🙆 http://anglo | trad/cindocweb/ | | ~ | Go | |
| | | Search Industry artic | es and photos | Modify | | Command for |
| Configured | Archives Home Multiple Archive Search Assisted Query Expert Query List View | Document author Document title * | Author COULDWELL, C. 7 Title Tornado devastates Cincinnati suburbs | ×4 | | canceling the current modification |
| binder input section for | • <u>Selection</u> • <u>Add</u> | Date of publication | 09.04.1999 | | | |
| modification | • <u>End session</u> | Information source * | Source DIALOGUE | 2 | | Field input |
| | | Abstract | Abstract Press cutting of tornado report plus map of area affected by the damage | | | assistance command |
| | | Keywords | CINCINNATI/ CINCOM/ TORNADO | ? | ш | |
| User's ontion to | | Status | ARCHIVED | | | |
| activate or | | Language | English | ? | | |
| | | → 🗹 Activate field controls | | | | |
| validation | | Û | Tornado information | | | |
| | | | Select operation for this folder 💌 | | | |
| Document | | Folder label | Tornado information | | | |
| folder revision and archiving section for the | | Documents | Tornado TITIF (1100Kb.) Gindinatijpg (60Kb.) | | | Commands for confirming the modification |
| current binder | | Keep old versions | | | | and deleting |
| | | | | OK Clear | ~ | any changes |
| | 🔊 | | | S Local intranet | | carried out |

Figure 39 – Modifying a binder (and its folders) in CinDoc WEB

You will not be able to modify the binder access key field if configured to be displayed in this page. Field input/modification, <u>input controls</u> and any associated <u>input aids</u> operate in the same way as described in <u>§Adding</u> <u>a New Binder</u> (Standard Mode).



<u>NOTE:</u> The **Cut/Copy/Paste** functions available in your Web browser can also be used between fields, binders and archives.

Click on the **Clear** button to ignore any changes carried out and return to the original binder. Click on **OK** to save any of your changes and return to the original detailed binder display screen (List View or Tile). Performing any other operation will automatically cancel the current changes; the same applies if you carry out a simple search in the header of this screen or if you click on the **X** button at the top of the page.

Deleting a Binder

This function for deleting individual binders requires you to be positioned on the particular binder in <u>detailed</u> <u>binder display</u> or <u>detailed document display</u>. Then click on the $\boxed{2}$ Delete button at the top of the page (available according to your <u>CinDoc rights</u> to the archive).

This delete function is potentially dangerous as it deletes all the following elements:

- The current binder in the archive
- Any links between the binder and archived document folders
- Any archived document folders linked to the binder (including all versions of each particular folder, if any). When these archived documents are stored on devices external to the CinDoc server, they will not be physically deleted.

A message will be displayed requesting confirmation for the delete operation.



<u>NOTE:</u> When the binder to be deleted contains links to documents, you will not be able to delete it unless you are an archivist for the archive. Furthermore, you will not be able to delete the binder if it is linked to any folders currently in revision. If you cannot delete a binder (e.g. binder locked by another user, document folder in

revision or user not an archivist for an EDM-activated archive), a message specifying the error will be displayed.

Once the binder has been permanently deleted from the archive, a message will appear in the header of the detailed binder display page for this deleted binder.

Note that you must resubmit the original query to view the right number of results after a delete operation.

Duplicating a Binder

This <u>binder addition</u> function is useful for creating a new binder based on an existing one; it avoids having to retype any common data while allowing you to update only the appropriate data.

To access this function, switch to <u>detailed binder display</u> or <u>detailed document display</u>, then click on the duplication button at the top of the page (available depending on your <u>CinDoc rights</u> to the archive). You will then switch to the Add binder page (<u>Figure 35</u>) with the text boxes already input according to the original binder and the fields configured by the Web administrator for this addition.



<u>NOTE:</u> Any archived documents linked to the original binder will not be linked to the new duplicated binder.

General Information on Binder Input/Modification Assistance Controls

4 types of input aids (used as input controls) are available to facilitate item selection during binder input, depending on the field and the settings selected by the owner of the particular archive. These aids are activated

by clicking on the *button* to the right of the particular field text box in <u>binder addition</u> and <u>modification</u> mode. The following are available:

- Assistance by index
- Hierarchical List assistance
- CinDoc Thesaurus Link assistance
- Simple List assistance

When you activate input assistance, any terms already present in the particular field will be retrieved in the selection section at the bottom of the assistance window.

If you wish to select a new term not present in the index or simple list, you will need to enter it directly in the particular field.

Using Input Assistance by Index

A separate input assistance window will be opened.

This screen consists of the list of items in the <u>index</u> associated to the control for the particular field, a text box enabling you to search quickly for an item by entering the first few letters of the desired item and a selection section, situated at the bottom of the screen.



The number of occurrences of each index item is also indicated for information purposes after each term [an occurrence is counted each time the item is present at least once in the source field(s) of the binder(s)].

Closing the Assistance Window

Click on **Cancel** or the **S** close button in the dedicated assistance window to switch directly back to the original screen without modifying it.

Browsing through/Positioning on the List of Index Items

When this window is first opened, you will be positioned on a list of index items, arranged in alphabetical order (by default, the first 20 terms are displayed, unless modified by the Web administrator).

- A vertical scrollbar is available for browsing through the items in the list according to the configured amount displayed per page.
- To browse between different pages of index terms, use the standard browse commands situated at the bottom of the screen: <u>First</u>, <u>Previous</u>, <u>Next</u> and <u>End</u>.
- To position the cursor at a particular point in the list of items, carry out one of the following operations:
 - Enter the first few characters of the desired index item in the text box provided for this purpose then press **Enter** (or click on **OK**)
 - Click directly on the particular letter or number that the search word begins with

When the desired item (or characters) does not exist, the list will be positioned on the next highest existing item after the entered characters, in alphabetical order.

Selecting/Deselecting an Item for a Single-Item Field

To select ONE item in the current page of the index list:

1) Click on the desired item followed by the \checkmark button. The item will then be inserted in the Selection section at the bottom of the assistance window. If you have Microsoft® Internet Explorer®, you can also double-click on an item to select it directly.

2) Click on **OK**. The assistance window will then close directly. The selected index item will be inserted in the relevant field in the binder addition or modification page. Any existing items will be replaced.

<u>NOTE</u>: In binder modification mode, any items already present in the particular field will be automatically inserted in the Selection section at the bottom of the input assistance window. To deselect an item in this list, you can either click on this item followed by the \clubsuit button or you can simply select a different item, which will automatically replace the previously selected item.

Selecting/Removing Items for Multiple Item Fields

1) To select an item in the current page of an index list, click on the desired item followed by the \checkmark button. The item will then be inserted in the Selection section at the bottom of the assistance window. If you have Microsoft® Internet Explorer®, you can also double-click on an item to select it.

To select a set of items in the current index page, click on the desired items while holding down the **Ctrl** or **Shift** keys. The selected items will then be highlighted in the page. To insert them in the Selection section, click on the \checkmark button.



<u>NOTE:</u> In binder modification mode, any items already present in the particular field will be automatically inserted in the Selection section at the bottom of the input assistance window. Item(s) are deselected manually in this list by clicking on the particular item (or several items using the Ctrl or Shift keys) followed by the $\stackrel{\frown}{\sim}$ button.

2) Then click on **Close** – this will close the input assistance window. The index items selected in the list will be inserted in the relevant field in the binder addition or modification page. If several items are selected, they will be separated by the item separator character configured for the particular archive.

Using Input Assistance by Hierarchical List

This function displays an additional screen containing a hierarchical list of words arranged in a tree-like structure. It enables you to select a set of items which will then form the field contents.

A hierarchical list is created in the Windows interface by the CinDoc administrator (or archive owner) using a specific module.



Figure 41 – Input assistance using a hierarchical list

Closing the Input Assistance Screen Without Inserting Items

Click on **Cancel** or the **X** button in the dedicated assistance window.

Browsing through/Positioning on the Hierarchical List of Items

When this window opens, all the first level hierarchical terms are displayed along with a vertical scrollbar, if necessary.

Click on a term in a hierarchical level to view all the terms in the level immediately below it, if any.

Items which have not yet been expanded will be indicated by a plus sign 1; those that have been expanded will be indicated by a minus $\boxdot{1}$ sign; items at the bottom of the hierarchy, which cannot be expanded further, will be indicated by a \square symbol.

Selecting/Deselecting Terms in the Hierarchical List

1) When you click on the item you wish to select in the list, it will be highlighted.

If you select a particular item in the list, its BROADER terms may also be inserted, i.e. those situated above it in the hierarchy. This is the case if the auto-insertion of broader terms option has been selected for the hierarchical list. The selected term, and any automatically inserted terms (separated by the item separator character for the archive), will be displayed on a single line indicating the entire hierarchy, ready to be inserted in the selection section below when you click on the **Add** button.



<u>NOTE:</u> When modifying a binder, any items already present in the particular field will be automatically inserted in the Selection section at the bottom of the input assistance by hierarchical list window. To deselect an item in this list, click on the item followed by the Delete button. To select several lines at once in the selection section, click on each of these lines while holding down the Ctrl or Shift keys then click on the Delete button as many times as required to delete each line one by one.

You can enlarge the assistance window to view all the items in the expanded or selected hierarchy.

2) Then click on **Close** – this will close the input assistance window. The items selected in the list will be inserted in the relevant field in the main CinDoc WEB window in binder addition or modification mode. If several items (or a hierarchy of items) are selected, they will be separated by the item separator character configured for the particular archive.

If the same items have been inserted more than once in *binder addition/modification mode*, either due to errors or the auto-insertion function, two scenarios can occur:

- If the Unique terms only option has been configured by the archive owner, any repetitions will be removed before being inserted in the field. Furthermore, any terms already existing in the field will not be inserted. When repetitions are removed, this can modify the hierarchical order of the items as displayed in the item selection section of the hierarchical list window.
- However, if this option has not been selected, the selected term, together with any terms inserted with it automatically, will be inserted on a new line in the field. The same term can therefore appear several times in the same field. However, the hierarchical order of the terms will be retained if the <u>auto-insertion of broader terms</u> option (only applicable to binder addition/modification mode) has been selected for the particular hierarchical list.

Using Input Assistance by Simple List

This function displays an additional input assistance screen containing a list of items. ALL the items in the list are displayed, in the order in which they were typed.

A simple list is created in the Windows interface by the CinDoc administrator (or archive owner) using a specific administration module.



Figure 42 – Input assistance using a simple list

Simple list input assistance functions in the same way as <u>index controls</u> except that you cannot display the number of item occurrences and you cannot search for the initial characters of an item (simple lists are in any case restricted in size and therefore in the number of items they contain).

Using Input Assistance by CinDoc Thesaurus

CinDoc enables you to use the thesauri configured for the archive as input assistance tools for a particular field. In this way, you can make use of all the synonym, associative and hierarchical relationships and perform the following operations:

- 1. Explore a thesaurus and select terms in one of 3 specific lists, by browsing through the hierarchical structure of a thesaurus and/or searching for a particular concept via the preferred term (or indirectly via a synonym or one of its relevant words).
- 2. View the semantic environment for a particular term, i.e. its hierarchical context and any information on usage enabling you to verify its meaning.
- 3. Select the indexing term(s) you wish to use (preferred term or descriptor for a concept) to populate a field used to index a document.

The following assistance window will be activated:



Figure 43 - Thesaurus link assistance dialog box: selecting terms for field content

Searching for a Concept and Viewing the Semantic Environment of a Thesaurus Indexing Term

Concepts can only be searched for in one of the 3 thesaurus lists activated in the drop-down list.

The functioning of these lists is described in the following sections of the 'Searching for Information' chapter:

- § Searching for a Concept in the Alphabetical List of Thesaurus Terms,
- § Searching for a Concept in the Permuted List of Relevant Terms,
- § Searching for a Concept in the Hierarchical List of Thesaurus Terms.

Details on the thesaurus term workspace are provided in the <u>Showing/Hiding the Semantic Environment</u> <u>Workspace for a Term</u> section.

Selecting the Descriptor Term(s) to Insert in the Binder

The selected items and those that already exist in the field will be stored in the selection area at the bottom of the assistance window.

SELECTING ITEMS

Terms can only be selected in one of the 3 thesaurus lists. You can only select ONE term at a time and the selected term can only be a DESCRIPTOR or a SYNONYM; click on a term to highlight it in one of the thesaurus lists then click on the **Add** button.



<u>NOTE:</u> Each term selected in a particular thesaurus <u>working language</u> will be systematically translated in the selection list according to the indexing language configured by the archive administrator/owner in the CinDoc Admin interface.

Descriptor(s) automatically inserted for the selected term (according to the configured settings, see $\frac{Viewing/Changing}{Viewing/Changing}$ the term selection settings for input) will be placed on a single line in the selection section of the assistance window (Figure 43).



<u>NOTE</u>: If you select a SYNONYM or an OBSOLETE DESCRIPTOR, its UPDATED DESCRIPTOR term will be inserted in the selection section instead. <u>When the synonym represents a complex</u> concept defined by a combination of descriptors, only these descriptors will be inserted on a single line, separated by the item separator character for the archive.

REMOVING SELECTED ITEMS

To remove an item from the selection section, click on the relevant line then click on the **Delete** button. ALL the terms in the selected line will be removed at once.



<u>NOTE</u>: With Microsoft Internet Explorer® (versions 5.0 and later), you can also double-click on a particular line to remove it directly from the selection section.

To select several lines at once in the selection section, click on each of these lines while holding down the **Ctrl** or **Shift** keys then click on the **Delete** button as many times as required to delete each line one by one, beginning with the last selected line.

CONFIRMING AND CLOSING THE WINDOW

Closing the assistance window will save the current settings of the particular thesaurus on the workstation for the user's next session (size and position of window, active thesaurus list, semantic environment shown or hidden and active viewing language).

Click on \mathbf{OK} in order to add the terms in the selection section to your query and close the assistance window.

2 scenarios are possible, depending on whether the UNIQUE TERMS ONLY option has been configured for the field by the CinDoc archive administrator):

1 - WITHOUT Unique terms only option:

TERMS WILL NOT BE SORTED. The hierarchical structures will be retained: each hierarchical group containing the selected term and any automatically inserted broader terms will be inserted as is into the field in PARAGRAPH form.

In the example in <u>Figure 43</u>, confirming the selected terms would insert the following 2 lines into the field:

COMPUTER SCIENCE / SOFTWARE COMPUTER SCIENCE / HARDWARE / NETWORK

2 - WITH Unique terms only option:

All the selected terms will be verified when the selection is confirmed to ensure no repetitions are inserted; the terms will then be inserted in the field one after the other ON A SINGLE LINE, SORTED ALPHABETICALLY and separated by the item separator character for the archive.

In the example in <u>Figure 43</u>, confirming the selected terms would insert the following into the field: COMPUTER SCIENCE / HARDWARE / NETWORK / SOFTWARE

Viewing/Changing the Term Selection Settings for Input

Click on the **<u>Options</u>** link at the top of the page; a dialog box will be displayed enabling you to view and modify (provided you have the required permissions) the default term selection setting for the current session (with input assistance for multi-item fields).

| 🗿 iD CinDoc Web - Microsoft Internet Explorer | 🛛 |
|---|-----------|
| Auto-insertion of broader terms: All | |
| | OK Cancel |
| | |
| | |

Figure 44 – Dialog box for viewing/modifying the auto-insertion of broader terms level for input assistance by thesaurus link

Activating auto-insertion of <u>**B**</u>*roader* terms will automatically insert the selected descriptor AND its broader term(s) into the selection list, depending on the number of superordinate levels requested and the position of the descriptor in the hierarchy.

The set of broader terms automatically inserted for the selected descriptor will be placed on a single line, in order of the hierarchy, with each term separated by the item separator character for the archive. The selected descriptor will be inserted in its hierarchical position.

In the example in Figure 43, selecting the descriptor *NETWORK* would also insert all its superordinate hierarchical terms, up to the configured number of levels (with the slash as the item separator for the archive): *COMPUTER SCIENCE / HARDWARE*



<u>NOTE</u>: When all the superordinate levels are requested, if one of the terms belongs to another hierarchy (with polyhierarchical thesauri), this hierarchy will also be included; each hierarchy will then be displayed on a separate line.

MANAGING DOCUMENTS



Viewable documents can be black and white or color images, which may have been scanned in to CinDoc, or office documents containing text or other items. To manage documents, you must be an **archivist** with the Write access <u>connection mode</u> activated.

Acquiring and Archiving a New Document Folder

In CinDoc WEB, this function involves retrieving existing electronic files and organizing them into a new <u>folder</u>, which will be both archived on the CinDoc server and linked to the <u>current</u> binder, rendering it accessible to all CinDoc users with access to the archive.

All these operations can only be carried out, step by step, if you are declared an **archivist** for the archive by an owner and when <u>adding</u> or <u>modifying</u> a binder.

| | <u>۵</u> |
|--------------|------------------|
| Folder label | New folder (FMB) |
| Documents | Browse |
| | OK Clear |

Figure 45 – CinDoc WEB Add page: Document acquisition/archiving section

| | Û | [New folder of documents] | |
|-------------------|---|---|----------------------------|
| Folder label | | XYZ Engine Specifications | |
| Documents | | D:\vir16_15.pdf D:\bse24_en.pdf D:\Stateful Inspection.htm Next document | Browse Browse Browse |
| Keep old versions | | | OK Clear |

Figure 46 – CinDoc WEB Modify page: Document acquisition/archiving section

The Create new document folder function is accessed from the bottom of the Add page (or from the Modify page after selecting the operation to be carried out) and is completed in 3 stages:

- 1) Selecting the documents in the folder to be archived
- 2) Creating a folder label
- 3) Archiving the folder

G Acquiring Existing Electronic Documents

Carefully select each file you wish to place in your folder, IN THE DESIRED ORDER: should you select the wrong file or select a file in the wrong order, you will need to close this screen and start again. Files are selected in the dialog box displayed by clicking on the appropriate **Browse** button. The characteristics of this box will depend on your operating system. To select a new document, click on the **Next document** link – a new Browse button will then be displayed enabling you to select your document.

[See Figure 46]

Adding a Folder Label

You can enter a label for the folder (free form text, maximum of **70** characters) for identification purposes.

You are not required to enter a label for a folder but this is recommended. Labels enable you to provide a more detailed description of the folder contents, in addition to the internal EDM folder number assigned to the binder/archived folder link.

[See Figure 46]

Archiving a Folder

Click on \mathbf{OK} in order to create a link between the newly created or modified binder and the active folder containing the selected documents.

During this operation, the files of the selected documents will be uploaded to the Web server and the folder created then placed in the archiving section defined for the archive on the CinDoc server.

The folder and the documents it contains will then be available to all users with access to the archive.

This stage completes the archiving operations. CinDoc WEB then reverts to detailed binder display, which now indicates the newly archived EDM folder.

In CinDoc WEB, an archived folder can only be linked to a single binder, the current binder.

[See Figure 46]

About Document Thumbnails

Thumbnails are archived automatically on the CinDoc server when documents are acquired. This enables the transfer and display time of the documents they represent to be optimized.



If documents are archived in the CinDoc Windows client interface, or if the document thumbnails are regenerated for the archive using the external CinDoc utility, these thumbnails will display the actual contents of the underlying document (**picture** documents) or the first page of the particular document (**office** documents).



Figure 52 – Example of a thumbnail representing a picture document



Figure 53 – Example of a thumbnail representing an office document

<u>NOTE</u>: The display quality of a thumbnail in CinDoc WEB depends on the settings selected for thumbnail generation by an archive owner in the CinDoc Windows client interface. Thumbnail sizes are configured by the Web administrator for the display screens.

Irrespective of the thumbnail type, you can click on it to <u>view the contents</u> of the underlying document. You can also right-click on a thumbnail to access the pop-up menu specific to your Web browser and thereby save the target document on your workstation or <u>print</u> it, if required.

Managing an Archived Document Folder Linked to the Current Binder

CinDoc WEB enables *archivists* for the particular archive to manage each archived folder linked to the current binder when <u>modifying</u> this binder by either deleting or modifying these folders.

Only an archived folder that is not in revision (i.e. not locked by another archivist) and only the latest version of an archived folder can be modified.

At the bottom of the Modify page is a specific folder management section.

You will need to perform the following operations here:

- 1) Select the document folder to be modified (when the binder contains several folders)
- 2) Select the operation to be carried out on this folder
- 3) Apply the changes to the binder and operation performed on the folder

Labels in the archived folder selection list for the current binder may appear as follows:

- If the folder label is displayed in red with the words (folder not modifiable) in parenthesis, this indicates
 that the archived document folder originates from a storage device external to the CinDoc server;
 consequently, IT WILL NOT BE ABLE TO BE PLACED IN REVISION and only the delete folder function will be
 available.
- If the folder label is displayed in red with the words (folder in revision) in parenthesis, this indicates that the archived document folder is currently being modified by someone else and you will therefore not be able to view it.
- If the folder label is displayed in green, this indicates that it can be placed in revision or deleted. Note that it can be locked by another archivist between the time you select it and when you apply your changes.



Figure 54 – CinDoc WEB Modify page:

Archived folder section showing a folder placed in revision by another archivist





Teleting the Selected Archived Folder

This delete function is potentially dangerous: the archived folder (and any versions of this folder) will be physically deleted from the archiving area on the disk. When these archived documents are stored on devices external to the CinDoc server, they will not be physically deleted. The archived folder number link will be permanently removed from the current binder.

- 1) Click on *Delete folder* in the drop-down list in order to delete ALL versions of the particular folder linked to the binder from the server.
- 2) Then click on **OK**. This will complete all the binder and/or EDM operations (without any request for confirmation before deleting the folder) then return you to the original detailed display screen.

[See Figure 54]

Deleting a Document in the Active Folder

- 1) Click on *Delete selected document* in the drop-down list then click on the radio button next to the thumbnail of the particular document. Only ONE document can be selected at a time.
- 2) Then click on **OK**. This will complete all the binder and/or EDM operations and return you to the original detailed display screen.



<u>NOTE:</u> You cannot use this operation to delete the last document in the current folder. By deleting all the documents, you effectively delete the actual folder. To do this, you should therefore use the function provided specifically for this purpose (see previous section).

[See Figure 54]

Adding a New Document to the Active Folder

- 1) Click on *Insert new document* BEFORE or AFTER selected document in the drop-down list then click on the radio button next to the thumbnail of the particular document.
- 2) Carefully select the new file to be added: use the Windows Browse button supplied for this purpose.
- 3) Then click on **OK**. This will complete all the binder and/or EDM operations and return you to the original detailed display screen.

[See Figure 54]

Replacing a Document in the Active Folder

- 1) Click on *Replace selected document by* in the drop-down list then click on the radio button next to the thumbnail of the particular document.
- 2) Carefully select the new file to replace the selected one: use the Windows **Browse** button supplied for this purpose.
- 3) Then click on **OK**. This will complete all the binder and/or EDM operations and return you to the original detailed display screen.

[See Figure 54]

BINDER SECURITY



This function is only enabled if security has been activated for the particular archive by the CinDoc supervisor. Two security modes are available for the binders in an archive:

- Assigning maximum security access levels to user groups. These range from 0 to 9, with 9 being the most confidential level. Archive owners can then apply a particular level to binders and thereby control access to them and their linked documents. For example, a group with a maximum access level of 5 for a given archive will be able to view all the binders and their linked folders which have been assigned levels ranging from 0 to 5.
- Using **restriction lists**. Archive owners can then determine which CinDoc user groups, and which users within these groups, may access particular binders and their linked folders.

The two modes can be used together, in which case a user will have to fulfill both conditions to access the particular binder (and by extension, any of its associated document folders). Security settings are configured in the CinDoc Windows client interface by the CinDoc administrator.

About Default Binder Security Settings

The security settings applied using the access level and/or restriction list methods are automatically saved in the relevant system fields of the CinDoc archive <u>each time a binder is created</u>.

Each time an archive is opened and the Add binder command selected, the minimum security settings will be applied to the binder, namely access level **0** and/or a restriction list setting for the **[Public Group]**, to which all users belong.

Assigning Security Settings for a Binder

CinDoc WEB automatically displays the *Security level* and *Restriction list* fields in the <u>Add</u> binder page, below the field input section, enabling you to assign the appropriate security settings.

In the <u>Modify</u> binder pages, these additional fields (or field) will only be displayed for the **creator of the current binder** and ALL **archive owners**; only they will be able to assign security settings different from the default ones.

| Security level | Security level | Access level security settings |
|------------------|------------------|--------------------------------|
| Restriction list | Restriction list | Restriction list security |
| | [Public Group] | settings (for authorized |
| | | users) |

Figure 56 – Security display and assignment section (both security modes configured)



<u>NOTE:</u> In the above figure, both security modes (i.e. access levels and restriction lists) have been configured for the current archive. Only the items relevant to the security mode(s) configured for the particular archive will be displayed here.

Assigning/Selecting a Security Access Level

In order to view or modify this code, the access level security mode must be activated for the current archive.

Then click on the drop-down list to select a new level for the current binder. This list contains 10 figures, ranging from 0 (no security) to 9 (maximum security).

[See Figure 56]

Viewing/Selecting Authorized Users

In order to view or modify the selected users, the restriction list security mode must be activated for the current archive.

The authorized users can be *CinDoc group names* (enclosed in square brackets) and/or *CinDoc user names*; these can be viewed in a non-modifiable drop-down list.

An assistance window can be displayed by clicking on the ? button to the right of the *Restriction list* field.



Figure 57 – Dialog box for creating security restriction lists

ADDING CINDOC USER GROUPS

Selecting a group will render ALL users belonging to this group authorized users. Groups are selected individually:

Go to the list of available groups and double-click on the group you wish to add (with Microsoft Internet Explorer® versions 5.0 and later). It will then be inserted in the restriction list section

on the right. Alternatively, click once on the desired group then click on the Add m k button.



<u>NOTE</u>: It serves no purpose adding different groups if [Public Group] has been added to the restriction list as this group contains ALL the declared CinDoc users.

Adding CinDoc Users

Users are added individually:

- 1) Go to the list of available groups and select the CinDoc group to which the desired user belongs.
- 2) Go to the list of users belonging to the selected group and double-click on the user you wish to add. It will then be inserted in the restriction list section on the right. Alternatively, click once on the desired user then click on the Add button.



<u>NOTE</u>: It serves no purpose selecting a particular user if you have selected the group(s) to which he/she belongs.

REMOVING SELECTED CINDOC GROUPS AND USERS

CinDoc groups and users must be deselected individually:

Double-click on the item you wish to remove in the group or user restriction list section. It will
then be removed directly. Alternatively, click once on the desired item then click on the
Remove button.

CONFIRMING AND CLOSING THE WINDOW

- Click on **Cancel** to close the user selection box and return to the original screen without modifying the initial list of authorized users.
- Click on **OK** to add the selected users and close the selection box. The list of authorized users will then be updated on the screen. User groups will appear in square brackets and each item will be separated from the next by a semi-colon.



<u>NOTE:</u> You can click on OK even if no group/user has been selected. In this case, the binder will only be accessible to its creator and ALL owners of this archive.

See Figure 57

Saving your New Security Settings

When you save the binder with the <u>OK</u> command, the selected security settings will be assigned to the current binder; these settings will be immediately applied for users who are not archive owners. CinDoc WEB will automatically update the list of binders accessible to each connected user.

[See Figure 56]

Viewing the Authorized Data for an Archive with Security Settings

Binders which are not authorized for the particular user will not be displayed. Users who search for data for which they do not have the required permissions will not have any results returned.



<u>NOTE</u>: Only archive owners and the CinDoc administrator/supervisor will be able to view all the data in the archive. Binder creators will always be able to access the binders they create, irrespective of the security settings subsequently assigned to these binders. If you are not an archive owner, you could find that you are no longer able to access a binder if the security settings are altered for the current archive. In this case, you will need to close the current archive and/or open another, accessible archive.

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