



EUROPEAN COMMISSION
DIRECTORATE GENERAL
for INFORMATICS



CIRCABC 1.0 Configuration Guide



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1. Preamble

Objective of this guide

This guide intends to enable you to configure your CIRCABC 1.0 beta environment and create your own categories and Interest Groups.

Short presentation

The CIRCABC 1.0 beta Configuration Guide explains step-by-step how to

- ✓ Create category headers
- ✓ Create the root of CIRCABC
- ✓ Make a template for creating Interest Groups
- ✓ Create CIRCABC categories
- ✓ Create an Interest Group in a CIRCABC category

Audience

This guide is intended for the administrators of a CIRCABC 1.0 beta environment. It is also addresses those who will create CIRCABC categories or Interest Groups.

So, the intended readership includes

- ✓ The EUPL licence-holders who will have to configure and maintain their CIRCABC 1.0 beta environment;
- ✓ The CIRCABC category administrators.

Some more advice

It is highly recommended to [read the Alfresco tutorial](#) before configuring CIRCABC. This is available from the Alfresco "GUEST HOME" section at <http://servername:portnumber/circabc/faces/jsp/login.jsp>

2. Manage your CIRCABC 1.0 environment

This chapter is intended for the [CIRCABC administrator](#).

A matter of vocabulary

Before going further with how to create your CIRCABC environment, you are warmly advised to read this short paragraph that will save you from confusing one another the Alfresco and Circabc structures.

Alfresco contains [spaces](#).

A space looks like a folder. It is characterized by properties, by a content and a set of actions. It can be split down to sub-spaces. Several spaces are grouped together in a category.

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Alfresco calls category a property to which hierarchical value is assigned. Several spaces can have a same category applied to.

CIRCABC therefore calls a category a group of interest groups focusing on a same domain. The CIRCABC categories correspond to the Circa Virtual Circas. **Several CIRCABC categories are grouped under a same header.**

On the standpoint of Alfresco, the CIRCABC "category headers" look like a classification.

Alfresco point of view	Corresponds to	CIRCABC point of view
category		The list of the Category headers
A sub-category		Each category header
A group of spaces classified under a same sub-category		A category of interest groups

The screenshot below shows an example of CIRCABC categories and category headers:

The screenshot displays the 'Browse CIRCABC-IPM Categories' page. It features a list of category headers on the left and a detailed view of the 'European Commission' categories on the right. A callout box highlights the list of headers, and another callout box highlights the list of categories under the 'European Commission' header.

Category Name

- European commission
- Other institutions and decentralised bodies
- Interinstitutional projects
- Interinstitutional Offices
- Others

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European Commission

Category Name	Category Name	Category Name
Agriculture	EuropeAid Co-operation Office	Join Interpreting and Conference Service
Budget	European Anti-Fraud Office	Joint Research Centre
Competition	Eurostat	Justice, Freedom and Security
Delegation	External Relations	Legal Service
Development	Fisheries	Paymaster Office
conomic and Financial Affairs	Financial Control	Personnel and Administration
Education and Culture	Health and Consumer Protection	Press and Communication
Employment and Social Affairs	Humanitarian Aid Office	Regional Policy
Energy and Transport	Informatics	Research
Enlargement	Information Society	Secretariat General
Enterprise	Internal Audit Service	Taxation and Customs Union
Environment	Internal Market	Trade

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Figure 1 what the CIRCABC categories of Interest Groups look like

Create the category headers


Access your CIRCABC server to configure your environment

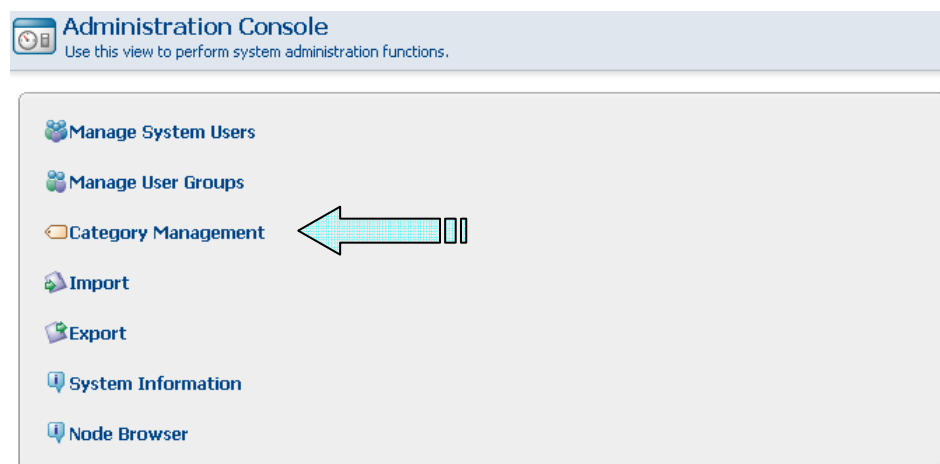
You access your CIRCABC server through

<http://servername:portnumber/circabc/faces/jsp/login.jsp>

where servername:portnumber represents the name and port number of your CIRCABC server.

You log in as an **Alfresco administrator**.

Once you have reached the main page of the Alfresco user interface, click the **administration console** icon () in the top toolbar and select **Category management**.



You can **add a new Alfresco category header** through the **Add category** menu.

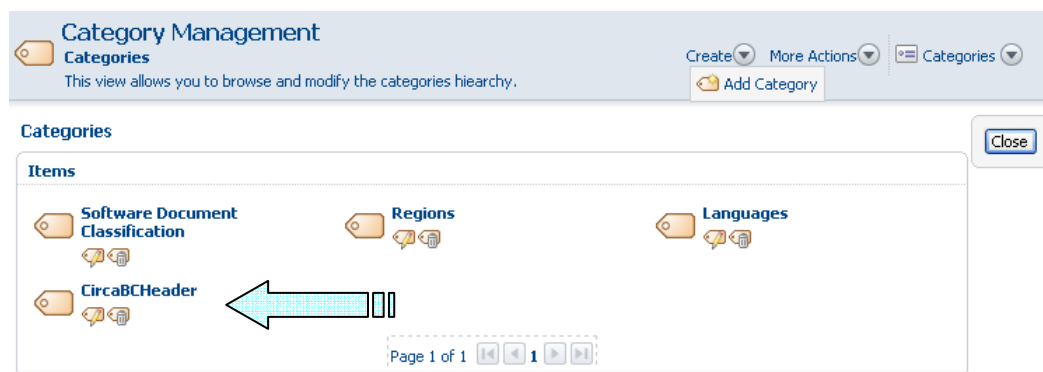
Having clicked **Add category** you are requested for keying in a name and description. Please, notice that the **"Name" field is case-sensitive**. **CircaBCHheader** is the default name.

The screenshot shows a 'Category Properties' dialog box. It has two input fields: 'Name' and 'Description'. The 'Name' field contains the text 'CircaBCHheader' followed by an asterisk (*). The 'Description' field contains the text 'category headers'. To the right of the dialog box, there are two buttons: 'New Category' and 'Cancel'.

By clicking **New category** you confirm the creation of your Alfresco category header.

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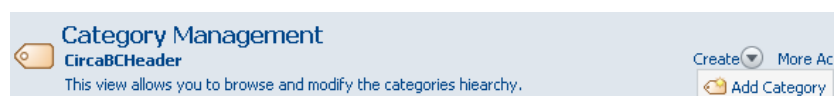
This appears as a header under which **CIRCABC category headers** will be stored:



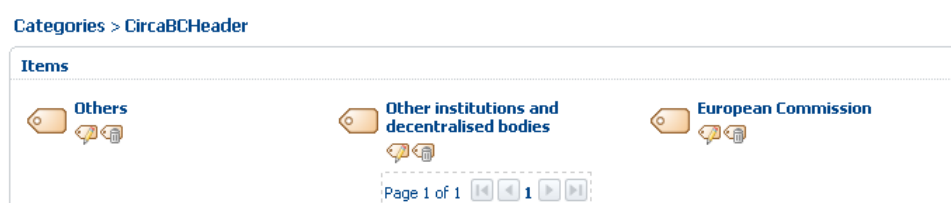
Should you change your mind, you can delete it simply by clicking the specific [Delete category](#) icon (🗑️). If you simply wish to modify it, choose the [Edit category](#) icon (✏️).

So the next step is for **adding CIRCABC category headers under the just-created Alfresco category header**. From the categories pane (you stay in [administration console / category management](#)), you click the name of the just-created Alfresco category (that is to say *CircaBCHeader*).

In so doing, you enter the main page of *CircaBCHeader*. You choose [Add category](#):



Now you can create all of the CIRCABC category headers you need. These will be listed under the Alfresco header previously created.



You can as well modify (✏️) or delete (🗑️) category headers.

Then close [Category management](#) by pressing on the [close](#) button.

Create the root of CIRCABC

The main page of the Alfresco user interface being displayed, select [Company home](#) from the top left toolbar, as shown below:



Let us create a CIRCABC root space.

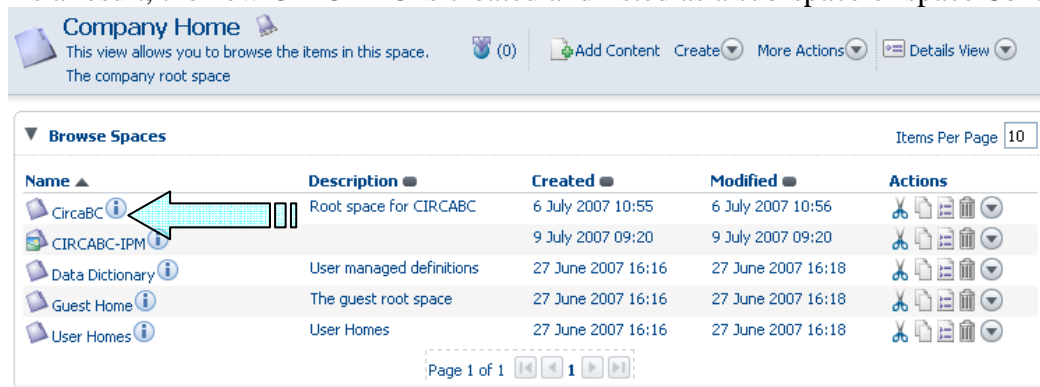
Once there, you click commands [create/create circabc](#).

The "create CIRCABC" dialog is launched; you are requested for giving a name, title and short description to your CIRCABC. Only the name is mandatory.

CircaBC is the default name.

Pressing the "finish" button confirms the creation of your CIRCABC.

As a result, the new CIRCABC is created and listed as a sub-space of space *Company Home*.



Later you are requested for defining a CIRCABC administrator. To do so, you will create and invite a new CIRCABC user.

Let us create users

First you move to the space "CircaBC".

Once there, you choose the menu [more actions](#) and click [create a new CIRCABC user](#). You fill in the "person properties" form and click [Next](#). Secondly you provide a user name and password (the password must contain three types of characters in four; for instance, small letters, caps and figures. It must be long between 8 and 12 characters). You click [Next](#) and get a summary of the action. And now you press on [Finish](#) to confirm the creation (or [back](#) to modify data before confirming again).

Let us invite the CIRCABC administrator

CIRCABC has to be managed by a specific user. This one is known as the **CIRCABC administrator**. So you will invite the user created on the previous step to participate in CIRCABC as its administrator.

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You select [invite new user to CIRCABC](#) from the [more actions](#) menu of the CIRCABC main page.

To invite means search for users and assign a profile to each of them. This profile describes what the user may do in CIRCABC. At this stage of the CIRCABC creation, you are proposed to invite any user and assign the profile "CIRCABC administrator".

You look for the user created previously: put the first letters of the name in the search box and click [Search](#). The name of the user comes up in the results box below the "search" button. Select it and click [CircaBC Admin](#) as profile (this is the one and only profile available from the [select profile](#) scrolling list). You click [add to list](#) to validate your choice and then press on [next](#) to reach the second step which allows you to [notify the user](#) (to notify is optional). At last, you confirm the whole invitation process by pressing the [Finish](#) button.

Step One - Select invited users and roles
Select new users and associated roles

General Properties

All Circa Users

Results for " in 'All Circa Users'. Clear Results

Circabc Administrator (circabcadmin@circa)
Digit Administrator (digitadmin@circa)
Mary Farewell (circajmadm@circa)
Circabc IG Leader (circaleader@circa)
Leo Lupo (wlifeadm@circa)

Select Profile

CircaBC Admin

name
Mary Farewell (CircaBC Admin) <input type="button" value="Delete"/>

To continue click Next.

Choosing a CIRCABC administrator

Your CIRCABC is now managed by a CIRCABC administrator who will build the categories where interest groups will be created and invite users as category administrators.

Create the CIRCABC categories

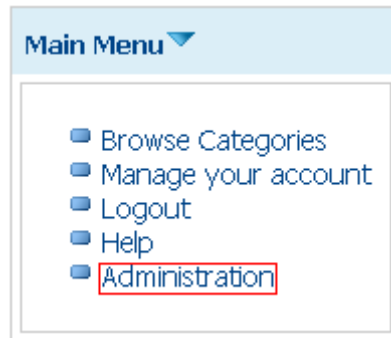
You access your CIRCABC via

<http://servername:portnumber/circabc/faces/jsp/extension/welcome.jsp>

where servername:portnumber stands for the name and port number of your CIRCABC server.

You log in as as the **CIRCABC administrator** (whom you have just created).

Once logged in CIRCABC as the CIRCABC administrator, you click [Administration](#) in the CIRCABC main menu:



You are taken to the Alfresco user interface and CIRCABC home space.

Let us create the CIRCABC category administrator

Before defining a CIRCABC category, you will create the user whom you will provide with the "category administrator" user profile.

To do so, you use the "Create a new CIRCABC user" procedure accessible through menu "more actions" (see [Let us create users](#)).

Let us create a CIRCABC category

You choose [Create/create category](#) from the menu bar of the CIRCABC home space.



Create a CIRCABC category

The "create category" dialog is launched. You follow the steps listed below:



Create a CIRCABC category in 4 steps

Step 1: Enter information

You [give a name and title](#) to the category. Then you press on [Next](#) in order to complete step 2.

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Step 2: Select Category header

You [choose the header](#) under which the new CIRCABC category will be stored.

Step 3: Select administrators

You are proposed to [select a CIRCABC user](#) to whom you assign the profile "Category Admin".

Practically, you search and select a user, select the only profile available and click [Add to list](#). The pair "user name/ profile" is repeated under "Name". If you ever change your mind, you can cancel your selection by pressing on the "bin" icon besides the name and profile. To confirm the selection, you press on button [next](#) which takes you to step 4.

Step Three: Select the Administrators for the new Category

Pick first the user you want as Administrator and later click "Add to List".

Specify Users/Groups

1. Select user/group and their role(s)

Circa Domain

Results for 'jim' in 'Circa Domain'. [Clear Results](#)

Jim Quarck (jim@notturmo.com)

Selected Category Administrators

name
Jim Quarck (CircaCategory Admin) <input type="button" value="bin"/>

Select a user as category administrator

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Step 4: Notify administrators

You are free to notify or not to notify the new administrators about their profile.

In the example below, we have created the categories "DIGIT" and "Acceptance" under the header "European Commission".

Browse Categories
This view allows you to browse the Categories.

▼ **Browse CIRCABC Categories**

Category Name
European Commission
Other European Institutions
Others

▼ **European Commission**

Category Name
DIGIT
Acceptance

▼ **Other European Institutions**

Category Name
No items to display.

▼ **Others**

Category Name
No items to display.

New categories under header "European Commission"

Having defined all the CIRCABC categories you wish, you log out.

Create an Interest Group

The **Category administrators** are in charge with building Interest Groups in their own category.

You log in CIRCABC at
<http://servername:portnumber/circabc/faces/jsp/extension/welcome.jsp>
as a **CIRCABC category administrator**.

Let us create an "Interest Group Leader" user

First, you will create the user whom you will later provide with the "Interest Group Leader" user profile.

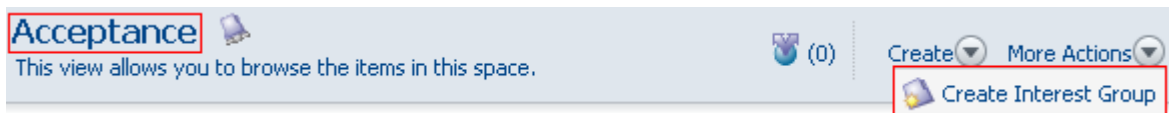
To do so, you use the "Create a new CIRCABC user" procedure accessible through menu "more actions" (see [Let us create users](#)).

Let us create an Interest Group

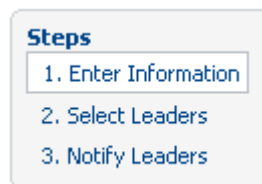
We create an Interest Group titled "Bujito". This will be classified under category "Acceptance".

You log in as the administrator of category "Acceptance" and select [Browse categories](#) from the CIRCABC main menu. You go to the welcome page of category "Acceptance". Once there, you click the option [Administration](#) in the main menu. In so doing, you switch to the Alfresco native user interface.

You select [Create/Create Interest Group](#) from the menu bar of the category main page.



The "Create Interest Group" dialog is launched. You have to complete the three steps listed below:



Create an interest group in 3 steps

Step 1: Enter information

You give a name and title to the new Interest Group (only the name is mandatory). You click [Next](#).

Enter the name and title of the Interest Group

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Step 2: Select Leaders

Now you [invite an Interest Group Leader](#). So you search and select a user (previously created) to whom you give the profile "IG Leader".

Step two: Select the Leaders for the new Interest Group
Pick first the users you want as Leaders and later click "Add to List".

Specify Users/Groups
1. Select user/group and their role(s)
All Circa Users | Per | Search

Results for 'Per' in 'All Circa Users'. Clear Results
Anne Percheron (AP@solipedes.com)

Add to List

Selected Interest group leaders

name
Anne Percheron (Interest Group Leader)

To continue click Next.

Next
Back
Finish
Cancel

You select user "Anne Percheron" as IG Leader

First, you select the user's name from the results box. Then, you press on [Add to list](#). The user's name is listed under "Name" along with the access profile assigned ("Interest Group Leader"). You click [Next](#) to confirm your choice. The "Back" button allows you to go back to step one.

Step 3: Notify Leaders

You are free to notify or not to notify the new Interest Group Leaders about their profile.

Step three: Notify Interest Group Leaders
Do you want to send an email to notify Interest Group Leaders?

General Properties
Do you want to send an email to notify the invited users?
☐ Yes ☒ No

Email message
Subject: You have been invited to '/CircaBC/Acceptance/Bujito' by AcceptAdmi AcceptAdmi

Use Template: Select a template... | Insert Template | Discard Template

Message: You have been invited to '/CircaBC/Acceptance/Bujito' by AcceptAdmi AcceptAdmi.
{0} is invited as {1}

To continue click Next.

Next
Back
Finish
Cancel

You choose not to notify

Now you press on the button [Finish](#) and the Interest Group is definitely created. It appears on the welcome page of the category it depends on. It defaults as a "registered" interest group. This means that the non-authenticated users cannot access it. You will be free to change this status. To do so, please, refer to the CIRCABC Users guide.

Category: Acceptance

This view allows you to browse the Interest Groups in this category.

...

▼ Member Access

Name ▼

Bujito

Description

By default, the new Interest Group is for members only

3. As a manner of conclusion

Your CIRCABC is now configured. The Interest Group leaders are ready to add other Interest Groups. Before coming to an end, we would like to wish you nice sharing information and resources through CIRCABC.