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CIRCABC Leader guide



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About the CIRCABC Leader guide

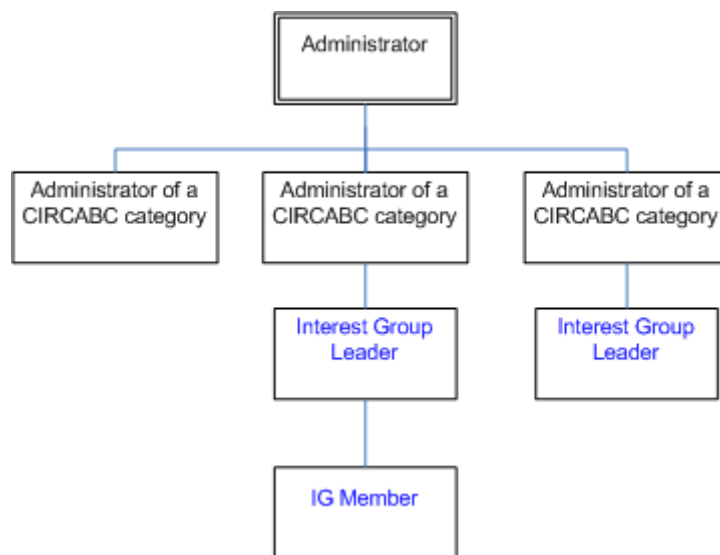
Before coming to reading this guide, it is highly recommended to consult the [Alfresco](http://www.alfresco.com/products/docs/) tutorial (<http://www.alfresco.com/products/docs/>), CIRCABC being developed on top of an *Alfresco* platform, an [Open Source Software](#)¹. It is also recommended to read the CIRCABC User guide.

Guide main objective

This guide explains the actions the Interest group Leaders (IG Leaders) perform in order to successfully manage the users, the services and the contents which are under their responsibility.

Audience

This guide is intended for the **Interest group Leaders**. First-time leaders will find there all what they need to know for the daily management of their Interest group (also called IG). Advanced leaders, who are used to navigate in CIRCA, can find information about features specific to CIRCABC.



The tree of responsibilities within CIRCABC

You have been granted **IG leader access profile** by:

- ✓ Either the administrator of your CIRCABC category;
- ✓ Or another Leader of this Interest group.

¹ Further information on OSS is available at <http://osor.eu/>

Structure

This guide complements the User Guide with features specific for the Interest group Leaders.

Those who are both first-time leader and first-time user are warmly advised to consult the [CIRCABC User Guide](#), first. The CIRCABC User Guide will help you better understand your users' needs by describing what the members of an Interest group can do.

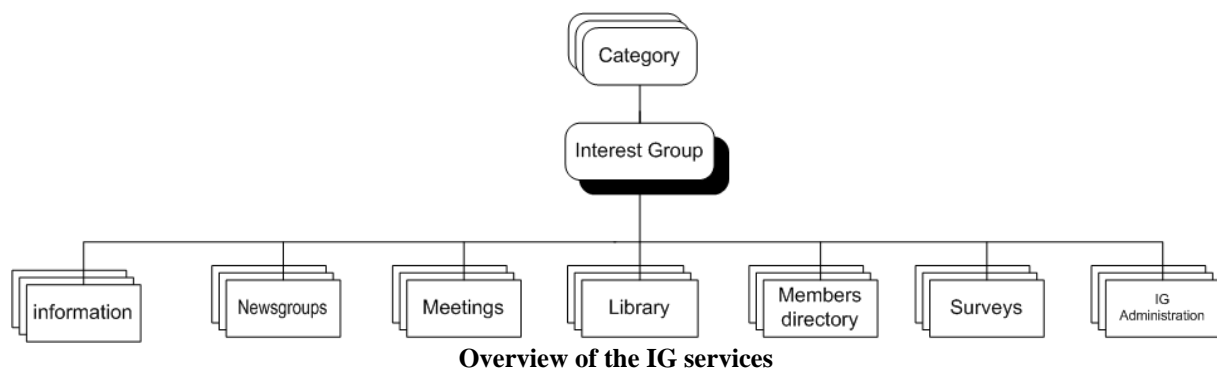
First-time leader

The role of the leader of an interest group has been assigned to you by either the administrator of a CIRCABC category or another leader of this IG.

First steps towards your IG

The Interest group (IG) you shall lead is an element of a category of Interest groups (CIRCABC category).

Any IG is characterized by a **group of users** (potentially unlimited), a set of **services** (Library service, Newsgroups, etc) and a collection of **contents** based on a main theme.



The services will be detailed from the standpoint of the Leader. Before coming to more information, let us shortly present each of them:

Library: the main service in your IG. It receives your documentary content.

Members: lists the members of your Interest group.

Information: short description of the IG; public information about how to join the IG (for further release).

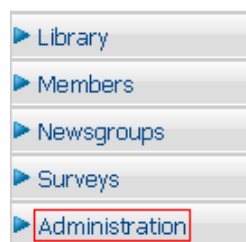
Newsgroups: enables to take part into or create discussions.

Meetings: for organising and attending virtual meetings. This service will be delivered with a further version of CIRCABC.

Surveys: allows preparing, launching or answering surveys through a link to IPM (Interactive Policy Making).

Administration: provides with IG management tools.

All of these services can be reached through the "main menu" of your Interest group Welcome page.



Click "Administration" in the main menu and find tools to manage your IG and its members

It is for you to manage users who participate, or wish to participate, in your own Interest group. The services offered by your IG are under your responsibility.

Notice however that acting as the leader of your Interest group does not provide you with any right on the other Interest groups.

For whom will your Interest group be available?

As an IG leader, you decide whether your Interest group (or a part of it) will be public or for membership.

"Membership" is the default status of every just created interest group. To change this status, you will select the service "Administration".

If you opt for membership, you will have to invite CIRCABC users to join your Interest group.

How to let people join your Interest group

Each member can access the IG services proportionally to the role they are expected to play. In this prospect, each newcomer is granted with an **IG access profile**.

We shall learn some more about the access profiles and about how to manage them. Once you will fluently use, modify, even create or delete access profiles we shall see how to assign them to anybody who would like to participate in the life of your Interest group.

To know more about the access profiles

About the access profiles

The access profile you assign to new members should mirror the way in which they would like to participate in your interest group:

Each **access profile** consists of a family of **rights** to collaborate in the various **services** of your interest group.

Each CIRCABC user may be a member of several interest groups. **Users have then an access profile per Interest group**. For instance, you may invite as leader a colleague who participates in other Interest groups with very few permissions.

Your IG is delivered to you with a set of default access profiles. These are:

IG Leader: the IG leaders administrate all the services of their Interest group.

IG Author: the authors participate in the Library and in the Newsgroups. They can create contents; they can edit any content but delete only their own contents. They can access and post news. They can access the Members service. They can encode surveys.

IG Contributor: the IG contributors participate in the Library and in the Newsgroups. They can only download contents. They can access and post news, access the Members service and encode surveys.

IG Secretary: the secretaries administrate the Members of the interest group. They cannot create content in the Library.

IG Reviewer: users granted with this profile can edit, but not create nor delete, contents. They can access and post news, participate in a discussion and access the Members service. They can encode surveys.

IG Access: those who are only given the IG Access profile can just read and download contents of the Library. They can only read posts in the Newsgroups, browse the Members service and access surveys.

Besides these, there are two additional profiles:

Registered: users who have registered may apply for membership. The Interest group Leader can provide them with access to the contents.

Public: The public users have no user name nor password so that they cannot apply for membership. The Interest group Leader, however, can set rights for public users.

About the roles

The roles are the smallest components of the access profiles. **Each access profile includes one role per service.**

The roles will be further described in the detailed presentation of each service. *However, the below table of the roles available for the **Library** provides an example of the rights attached to some roles.*

No access: this means that you cannot even read contents;
Access: read only; you can only download contents items as well as their properties;
Edit only: you can only edit any content item; you cannot create nor delete any.
Manage own: you can create, edit and delete your own contents. You can only access the documents created and managed by the other members.
Full Edit: you can create, edit and delete your own contents; you can edit any content whoever be its author.
Administrate: you can manage the service to which this right is applied.

How to customise access profiles

On creation by a CIRCABC category administrator, your interest group has been implemented with [default access profiles](#). You can use them as-is or customised. For instance you can, for a given profile, narrow down the right to access the library while extending access to the newsgroups... You can even set access profiles from scratch.

Do not forget, however, that modifying an access profile affects all the members who have been assigned this profile.

Further to customising, access profiles with a same name but depending on different Interest groups may differ from one another. So, keep in mind that the access profiles you define are known by your interest group, only.

How to customise default access profiles

You are allowed to

- ✓ Change some (or all) of the roles it is made of.

Do not forget that you cannot

- ✓ Rename neither delete any Default Access Profile;
- ✓ Modify nor delete the IG Leader profile;
- ✓ Attach rights other than 'Access only' or 'no access' to the 'Public' or 'Registered' profiles.

To edit the default access profiles, select the "Administration" service and click "**manage access profiles**". It takes you to a list of the access profiles. As shown below, you can select a different role for each profile in each IG service. Once done, you validate the modifications by clicking OK.

Profile internal name	Visibility Role	Library Role	Directory Role	NewsGroup Role
IGLeader	Visibility	LibAdmin	DirAdmin	NwsAdmin
Author	Visibility	LibFullEdit	DirAccess	NwsPost
Contributor	Visibility	LibAccess	DirManageMembers	NwsPost
Reviewer	Visibility	LibEditOnly	DirAccess	NwsPost
Secretary	Visibility	LibNoAccess	DirManageMembers	NwsNoAccess
Access	Visibility	LibAccess	DirAccess	NwsAccess
Registered access	Visibility	LibAccess	DirNoAccess	NwsNoAccess
Public access	NoVisibility	LibNoAccess	DirNoAccess	NwsNoAccess

We change the role attached to the "Members" service for the access profile "Author"

How to create and modify dynamic access profiles

Creating a Dynamic Access Profile means:

- ✓ attach one role to each service of your IG;
- ✓ give a name to the access profile so created.

The Dynamic Access Profiles you have created only apply to the interest group for which they have been defined.

Select the "Administration" service and click **"manage access profiles"**. You will simply give a name to the new profile and select a role per service.

Profile internal name	Visibility Role	Library Role	Directory Role	NewsGroup Role
IGLeader	Visibility	LibAdmin	DirAdmin	NwsAdmin
Author	Visibility	LibFullEdit	DirAccess	NwsPost
Contributor	Visibility	LibAccess	DirAccess	NwsPost
Reviewer	Visibility	LibEditOnly	DirAccess	NwsPost
Secretary	Visibility	LibNoAccess	DirManageMembers	NwsNoAccess
Access	Visibility	LibAccess	DirAccess	NwsAccess
Registered access	Visibility	LibAccess	DirNoAccess	NwsNoAccess
Public access	NoVisibility	LibNoAccess	DirNoAccess	NwsNoAccess
DynX12A	Visibility	LibAccess	DirManageMembers	NwsModerate

Create a dynamic Access profile

Once done, you click **"Add profile"**. The new profile is now listed among the access profiles available for your interest group.

Profile internal name	Visibility Role	Library Role	Directory Role	NewsGroup Role
IGLeader	Visibility	LibAdmin	DirAdmin	NwsAdmin
Author	Visibility	LibFullEdit	DirAccess	NwsPost
Contributor	Visibility	LibAccess	DirAccess	NwsPost
Reviewer	Visibility	LibEditOnly	DirAccess	NwsPost
Secretary	Visibility	LibNoAccess	DirManageMembers	NwsNoAccess
Access	Visibility	LibAccess	DirAccess	NwsAccess
Public access	NoVisibility	LibNoAccess	DirNoAccess	NwsNoAccess
Registered access	Visibility	LibAccess	DirNoAccess	NwsNoAccess
DynX12A	Visibility	LibAccess	DirManageMembers	NwsModerate
	Visibility	LibAccess	DirManageMembers	NwsModerate

Access profile "DynX12A" has just been created

Modifying a dynamic access profile follows the below rules:

- ✓ You can modify any dynamic access profile;
- ✓ You can rename it;
- ✓ You can delete it only if it is not currently assigned to any member.

By creating and modifying **dynamic access profiles**, you can keep in line with the needs of your interest group's fellow-members, enabling them to collaborate in whatever way. Keep in mind, however, that the more profiles, the more complex the IG management...

Now, you are able to manage access to the IG services. You are ready to invite newcomers to take membership.

How to invite a new user to your IG

As an IG Leader you can invite new users to your interest group and assign access profiles to them. In fact, anybody who has been granted with either the "Manage Members" or "administrate" role over service "Members" can invite users to join the Interest group. Please, note however that those who have the "Manage members" role can only invite. They are unable to create, modify neither delete "Access profiles".

Please, keep in mind that **a same user may get membership of several interest groups**. By offering membership, you simply provide rights to collaborate in your IG.

Whom to invite?

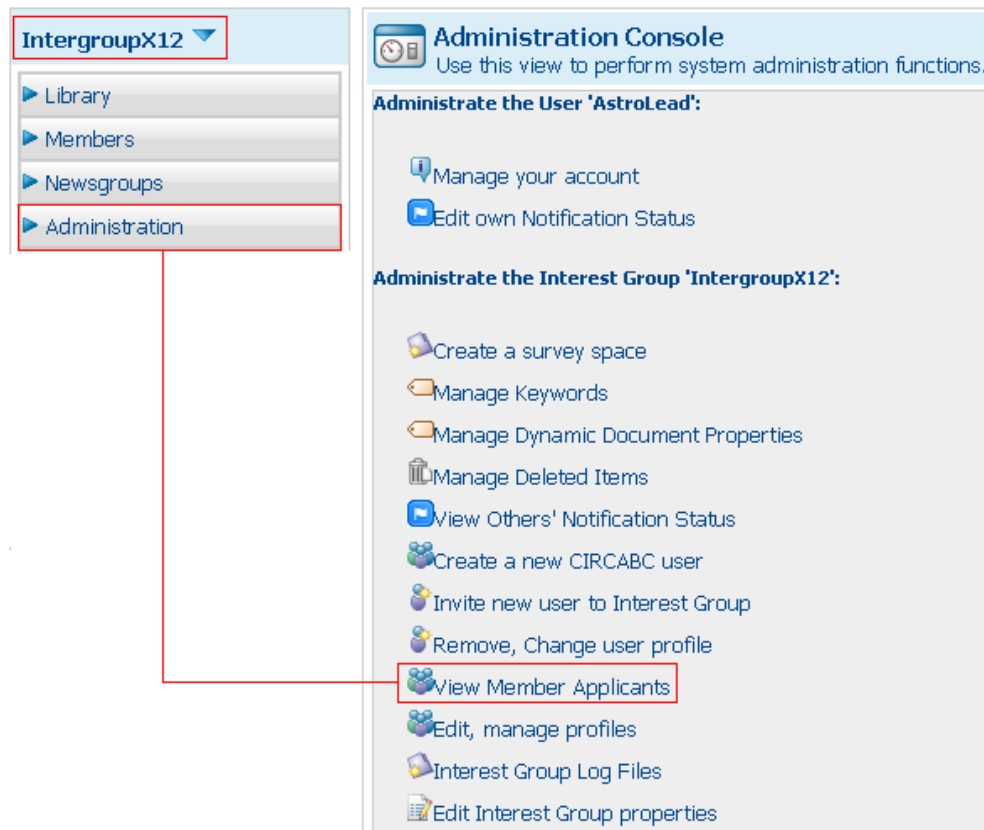
Users can be invited in two manners:

- ✓ An authenticated user contacts you through the "[Apply for Membership](#)" procedure (see "Apply for Membership" in the *CIRCABC User guide*);
- ✓ You invite (or create and invite) a user on your own initiative.

Invite someone having applied for Membership.

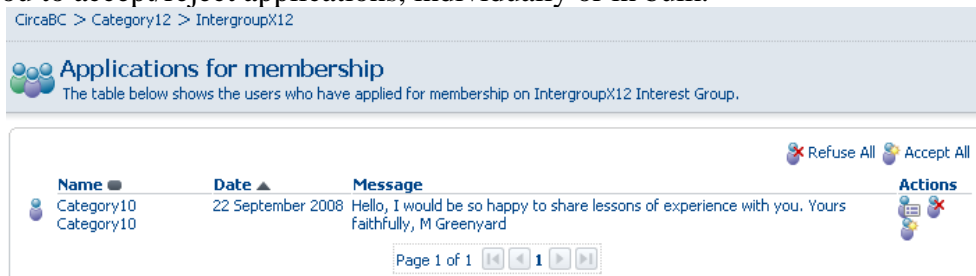
A would-be user has followed the link "Click here to join this group" available from the welcome page of your interest group. Then user has filled out and sent the application form (for further information, see "[Apply for Membership](#)" in the *CIRCABC User guide*).

To check the pending applications, select "Administration / **View Member applicants**" from the main page of your interest group.



Check pending applications for membership in IG "IntergroupX12"

The page "Application for Membership" lists your Interest group's would-be members and allows you to accept/reject applications, individually or in bulk.



You can opt for accepting or refusing to grant membership.

Invite someone who has not applied for membership.

You are free to invite anyone having not applied for membership, even if existing not yet in your CIRCABC system. In the latter case, you will first create this new user in CIRCABC and then invite him/her to join your Interest group.

How to create a new CIRCABC user

Select the "**more actions/ create a new CIRCABC user**" command from the top-right angle of the "Administration" service welcome page...

This procedure runs over 3 steps:

Step 1:

You are requested for **recording the properties** of the new user. You will put there the **person properties**.

The first name, last name, postal address, phone and e-mail fields are **mandatory**.

Create a new user; person properties

The top line indicates the current step. Once you have keyed in the requested data, press onto **Next** (in the top right box) in order to reach "**step two**".

Step 2:

You are now expected to assign a **user name** and a **password** to the new user. **Both User name and password are mandatory.**

Forgotten the rules applying to user name and password? Just take a look at the '[Register procedure](#)' (see 'Getting a CIRCABC account', in *CIRCABC User guide*).

You can also select the language in which the user will read the contents ("Content language filter" option). The users are able to change it through the "User options" section of the "Manage your account" form (available from the CIRCABC "main menu").

Create a new user; user properties

Once you have filled out this second form, click again on **Next** in order to be taken to **step 3**.

Step 3:

Now you have reached the last step of "create users". This is the **validation step**. This provides you with a **summary** of your transaction.

Create a new user; summary

- ✓ If you agree with the data in the summary, just click **Finish**. The new user is recorded as a new CIRCABC user.
- ✓ If you ever disagree and wish to modify any data, click **Back**. Then you modify the form and click again on **Next**. If you now agree with the data you have put, click **Finish** in order to confirm the creation of a new user.
- ✓ If you simply wish to quit the creation process and not to validate the new record, click **Cancel**.

The new user has been created in CIRCABC, you can now invite him/her to join your Interest group.

How to invite a new user

Whichever user you invite, you follow the "Invite user" procedure.

You can then select any existing user, no matter whether he/she is already a member of any other Interest group.

From the top toolbar of your IG welcome page, select "**More actions / Invite new user to Interest group**"; this launches the "Invite CIRCABC user" dialog. By following the below steps, you manage invitations to membership:

- ✓ Select the user you wish to invite;
- ✓ Select an access profile;
- ✓ Check that the right profile has been given to the right user;
- ✓ Notify the selected user that he/she is now a member of your IG. This last step is not mandatory (except for inviting applicants).

1. Select the user you wish to invite:

Insert any part (3 characters or more) of the user first or last name in the "**search**" field of the "**Select invited users and profiles**" pane.

You cannot not invite twice a same user (once invited, user is removed from the list of the searchable people).

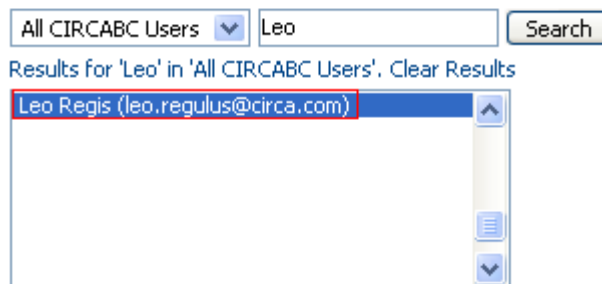
You can select and invite up to 1000 users at a time.

Press onto the **Search** button. The search results are displayed in the results box so that you can select the one you wish to invite:

Step One - Select invited users and profiles

Select new users and associated profiles

General Properties



Whom to invite?

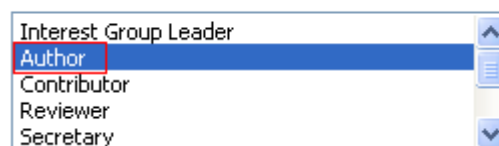
Please, notice that the user search engine reads only the first names and last names. So, do not use the User name as a search key.

Once you have selected a user, you provide him/her with an access profile:

2. Select the access profile you wish to assign

Select an access profile from the scrolling list; click **Add to list**.

Select Profile



Which access profile?

Once you have chosen both a user and the access profile, press the **Add to list** button:

Add to List

3. Check that the right access profile has been given to the right user

You have clicked on **Add to list**; the page is refreshed so that the user identification and access profile are displayed in the **Name** field, at the bottom of the page:



name
Leo Regis (Author) 

Select new Member

If you ever change your mind and definitely decide not to invite the selected user, click the bin at the end of the "name (access profile)" line.

You can invite several new users at a same time. You repeat "search user", "select profile" and "add to list" as many times as necessary. Then you click only once on "next".

Having passed through Step one, you push the top-right **Next** button.

4. Notify the invited users that, as from now, they are members of your IG. This is optional.
In the example below we have opted for notify:

Step Two - Notify new invited users

Compose your notification message

General Properties

Do you want to send an email to notify the invited users?

☒ Yes ☐ No

Email message

Subject You have been invited to '/Company Home/CIRCABC/HaveaLook/Linguistics' by cla

Use Template

Select a template...

Insert Template

Discard Template

Message

You have been invited to '/Company Home/CIRCABC/HaveaLook/Linguistics' by claudine claudine.
leoreg@circa is invited as Contributor

Notify or not to notify

Now, you are able to create new users, invite newcomers to participate in your interest group and assign them an access profile defining the extent of their collaboration.

So, let us go further with managing users.

List the members of your Interest group

If looking for a member of your Interest group ...

If wishing to list all of its members...

You will consult the **Members** service. This can be accessed through the services list of your interest group.



The main menu such as seen by anybody who may access all the IG services

- Can I list all the members of my interest group at a time?
- If your interest group contains less than 1001 users, you can. The "Members" search function, indeed, is unable to display more than 1000 members at a time (even if you have asked for "all CIRCABC users", "all domains" and "all profiles"). Once this limitation has been reached, you are warned by a specific message.

You can narrow your search to the only members of your interest group or look for any CIRCABC user. You can explore one or more domains (CIRCABC, CEC...), limit the exploration to one profile, etc.

The results are listed just below the search form.

The image shows a web interface for searching users. At the top is a section titled 'Search for users' with a search input field containing 'Bérénice', a 'Filter by' dropdown set to 'Members only', a 'All domains' dropdown, an 'Author' dropdown, and a 'Search' button. Below this is a section titled 'List of users' containing a table with four columns: Surname, Firstname, Access Profile, and Actions. The table has one row with the values 'Nébule', 'Bérénice', and 'Author'. The 'Actions' column contains a small icon. At the bottom right of the table is a pagination bar showing 'Page 1 of 1' and navigation icons.

Search only the members of your internet group

How to remove membership

You can remove membership only from your own interest group. Removed members keep the membership they may have in other interest groups. You cannot delete users from the CIRCABC user list.

You can remove any type of member. Keep in mind, however, that **your Interest group must have at least one IG Leader**.

The "**remove membership**" procedure can be launched through the "Administration" service. Select "**Remove, change user profile**" from the "Administration" main page. You get a list of the members of your Interest group. Click the "Remove" icon (🗑️) next to the member to be removed.

Users and Groups			
Name	Username	Profile	Actions
topsitu@circa	topsitu@circa	Access	
stephane@circa	stephane@circa	Author	
marius@circa	marius@circa	Access	
leoreg@circa	leoreg@circa	Contributor	
claudine@circa	claudine@circa	IGLeader	

Page 1 of 1

From this view, you can remove or change an access profile

You are asked for confirming your choice or cancelling the action.

How to change the access profile of a member

The access profiles are not definitely assigned. You can change the access profile of any member, at any time.

Keep in mind, as noticed above, that **your Interest group must have at least one IG Leader**.

Those who are provided the '**DirManage Members**' role in service "Members" may modify the access profile of any interest group member other than:

- the interest group leader if unique
- themselves.

To change access profiles, you make use of the "**Remove, change user profile**" command (reachable by selecting service "Administration" at the root of the interest group). Choose the user whose access profile has to be modified. Click the "**change**" icon () next to the user's name and profile.

Users and Groups			
Name	Username	Profile	Actions
AstroSecret@circa	AstroSecret@circa	Secretary	
astrolead@circa	astrolead@circa	IGLeader	
AstroContri@circa	AstroContri@circa	Contributor	
astroauthor@circa	astroauthor@circa	Author	
AstroAccess@circa	AstroAccess@circa	Access	
andiamoac@circa	andiamoac@circa	Access	

This member has received the access profile "Access"

Once done, you can select another access profile.

Edit the profile for the user **andiamoac@circa**








Access

- Interest Group Leader
- Author
- Contributor
- Reviewer
- Secretary
- Access

OK Cancel

We change his access profile

You validate the modification by clicking on "**OK**" at the top-right angle of the "Change Member's access profile" page.

Users and Groups			
Name	Username	Profile	Actions
 AstroSecret@circa	AstroSecret@circa	Secretary	
 astrolead@circa	astrolead@circa	IGLeader	
 AstroContri@circa	AstroContri@circa	Contributor	 
 astroauthor@circa	astroauthor@circa	Author	 
 AstroAccess@circa	AstroAccess@circa	Access	 
 andiamoac@circa	andiamoac@circa	Secretary	 

Now, this member is assigned the access profile "Secretary"

Not to forget that the user access profile is replaced only for the current interest group.

Help users with lost access codes

Help users with lost password

Losing password is probably one of the most frequent issues users may happen to meet. Fortunately, this can be easily solved through an automatic procedure.

Self-Resent password

A user who has lost password tries the "Did you [forget your password?](#)" link. A new password is e-mailed to the address stored in the Members directory. For a security purpose, the user name is not e-mailed along with the password. **You do not take any part in this procedure.**

Now you know how to create new users. You are able to modify or even remove their access rights. It's time to go and explore the library.

The Library's corner

The library is the main service of your Interest group.

As a leader, you **administrate the Library**. But you may share such permission with other members of your interest group. So, anybody who is assigned the "**administrate**" **role over the Library** is able to manage this service. "Administrate" means that you will be responsible for maintaining the library. You will **manage content** as well as **users**. You can modify the structure of the library by adding subspaces.

What shall we learn?

We shall see how to:

- Organise a library (create and modify sub-spaces)
- Manage content (create, add or modify content)
- Manage users

The CIRCABC User guide offers a chapter dedicated to multilingualism (see '[How to deal with multilingualism](#)', in *CIRCABC User guide*).

What is this for?

Further explanation can be found in '[How to deal with the library](#)' in *CIRCABC user guide*.

Whom is the Library intended for?

Further explanation can be found in '[How to deal with the library](#)' in *CIRCABC user guide*.

What does it look like?

Further explanation can be found in '[How to deal with the library](#)' in *CIRCABC user guide*.

Now you are familiar with the structure of the Library; let us go further and learn more about how to manage it.

Organising a Library

Creating sub-spaces in a library

Who can create spaces?

Can you add content? If so, you can also create spaces in the Library. In fact, the "**Administrate**", "**Full-edit**" and "**Manage-own**" roles enable to create sub-spaces in the Library.

How can I create a sub-space in the library of my interest group?

Further explanation can be found in '[Create sub-spaces in the Library](#)' in the *CIRCABC user guide*.

How to delete or recover sub-spaces:

In the same way as you can add sub-spaces to your Library, you can delete some. On the other hand, you may wish to recover a space that you have cancelled too swiftly. To know more about, just read below.

Deleting a sub-space of the Library

Further explanation can be found in [Delete contents or spaces](#) in the *CIRCABC user guide*.

"I have deleted a space by mistake. Is it definitely lost?
- No; you can recover deleted spaces through "**Search for deleted items**"

Let's see how to recover deleted spaces.

Recovering the deleted spaces

"**Manage deleted items**" enables you to recover or definitely suppress the spaces or content items that you have deleted during a period which may date back to 30 days.

Are there restrictions in recovering spaces?

Only those who can delete spaces can recover them.

Notice that you can recover only the spaces you have yourself deleted.

Where is this function available from?

"**Manage deleted items**" can be accessed through the "**Administration**" service. You find it by selecting "Administration" from the interest group main page.

How to retrieve deleted items

You have reached "**Manage deleted items**" from the "**Administration**" main page. The **Manage deleted items** interface is displayed, enabling you to search with various criteria.

Name	Original Location	Date Deleted	Actions
Viaggiare	/Company Home/CircaBC/CloTry/Andiamo/Library	18 December 2007 10:17	

User is looking for the items deleted within the last 7 days

- ✓ Deleted spaces or contents can be searched by their **name** or their **content**.

Search by name: you can search with any part of the name.

Search by content: you must use whole words. The search engine deals with proximity: the expressions or sentences can be quoted (i.e. 'task force'). The dash in the compounded words is simply ignored by the search engine (right-handed will be found whether searched with word "right", or with word "handed" or even with the string "right handed").

- ✓ You can search over a **time span** (the current day, one week or one month).
- ✓ **Show all** allows you to display all what you have deleted.

The search fields can be **combined**. By ex., we can ask for a space containing the character string "2007" and having been deleted within the seven last days.

The search comes up with a **result list** showing, for each item, its name, location and deletion date.


This result list gives us an opportunity to either recover or delete definitely the deleted items.




Definite choice

How can I recover deleted spaces?

- ✓ Recover listed items


We have looked for some spaces. Our research comes up with several results, all of them relevant. So we should like to recover all of these deleted spaces at one time. This is possible by clicking the **Recover listed items** icon () at the top of the results list.













Otherwise, if we prefer to delete definitely all these spaces, we click the **Delete listed items** icon ()

- ✓ Recover a specific item

We have looked for all the spaces and contents we have deleted today. We decide to recover only one space. In the below figure, the space to be recovered is titled "Whynot".

We click the **Recover** icon () next to "Whynot".

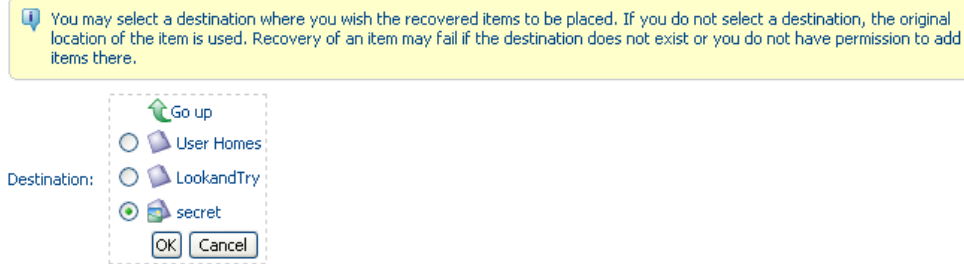


Name	Original Location	Date Deleted	Actions
 New energies	/Company Home/LookandTry	22 Mai 2007 14:46	 
 Gozzi-Goldoni.pdf	/Company Home/LookandTry	22 Mai 2007 14:45	 
 forestn2k_it.pdf	/Company Home/LookandTry	22 Mai 2007 14:45	 
 whynot	/Company Home/LookandTry	22 Mai 2007 09:25	 

Space "whynot" is ready for recovering

We are proposed to **choose the location where the space should be restored**. This place, indeed, may be different from the initial one.

Are you sure you want to recover "whynot" from the deleted file store?

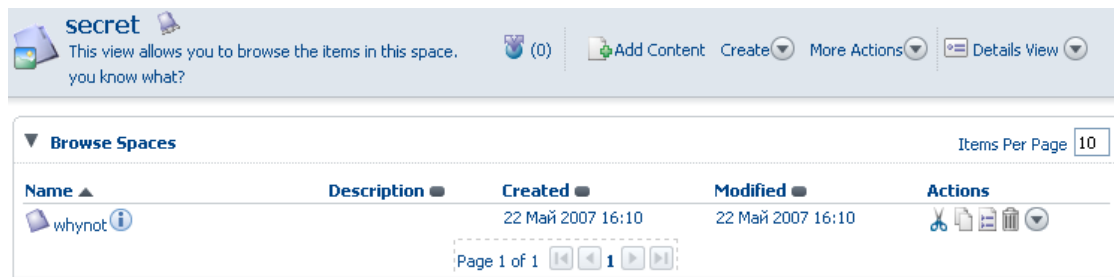


Space "whynot" will be recovered under space "secret"

If need be, we indicate the destination before confirming our wish to recover "Whynot"(top right **ok** button).

Name	Original Location	Date Deleted	Actions
New energies	/Company Home/LookandTry	22 Май 2007 14:46	
Gozzi-Goldoni.pdf	/Company Home/LookandTry	22 Май 2007 14:45	
forestrn2k_it.pdf	/Company Home/LookandTry	22 Май 2007 14:45	

Once recovered, "whynot" is removed from the result list



It is now listed as a sub-space of space "Secret"

We have now come to an end with the delete/recover spaces of your IG Library.

The **more actions** menu of the library allows some common actions such as cutting, copying spaces while the properties allow you to change the name or description of any space.

Some more actions (move, rename)


How to move a sub-space


To move a sub-space to another space is very easy. Just click the **cut** icon in the **more actions** menu (to be selected from the toolbar of the space welcome page).

Once cut, the space appears in the clipboard (accessible through "navigator"/"shelf"). The clipboard contains the "Paste" and "Remove" options. Notice that "remove" simply means the removal of the item from the clipboard. This will not delete it from the Library.

How to rename a sub-space

You may change the name of any space.

To do so, you select **view details** () from **more actions** (in the toolbar of the space welcome page). The details of the Library are displayed.

You press the "modify" icon () in the top bar of the "**properties**" pane. The "**Modify Space Properties**" dialog is launched. You put a new name. Notice that you are free to change other parameters such as the space icon, title and description.

Then just click **OK** in order to validate the changes.

Managing the content of a library

As an IG leader you can add, create, modify and delete content. You can run specific actions over the content such as adding translations.

About multilingualism

Dealing with multilingualism

Dealing with multilingualism is one of the CIRCABC main features. CIRCABC indeed sets relations between a given content and all its translations. This means that you can display contents in your favourite language. If the requested translation is not available, you can read content properties in your language.

The *CIRCABC User guide* provides a detailed description of how CIRCABC deals with multilingualism (see "[How to deal with multilingualism](#)").

Some more about multilingual spaces

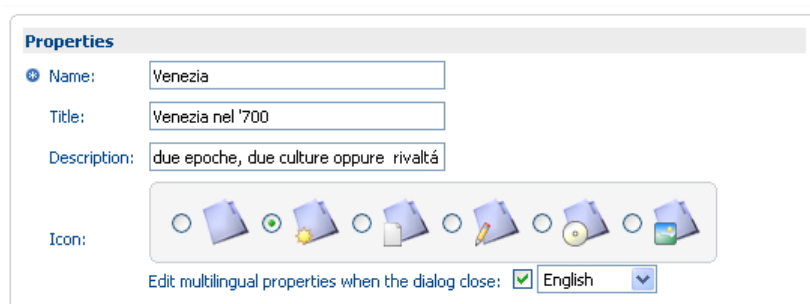
What is a multilingual space?

CIRCABC enables you to create multilingual spaces. These spaces have some of their properties (title and description) translated in the languages you wish so that most members of your multilingual interest group can browse spaces in their native language.

How can I make a space multilingual?

In the Library menu, click **Create space**. The "create space" dialog is opened. At first glance, the creation procedure is quite common. You are asked for providing name, title and description for the new space. You can notice, however, two green circles besides field "Title" and "Description". Press on them and you will know how to make the space multilingual.

In the example below, the properties have been initially created in Italian. We need to add their translation in English and in German:

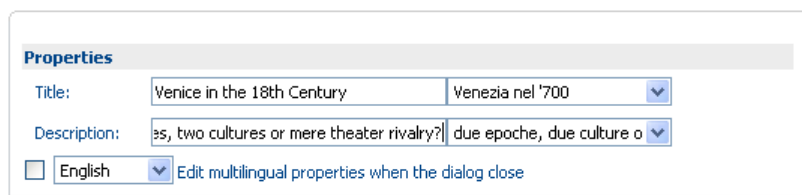


Creating a multilingual space

To say the truth, it is not really difficult. It just requires that you take care of the order of the steps to be completed:

- ✓ First, we key in the properties in the original language (Italian, in the example below) and click "create space".

- ✓ Then, on the main page of the Library, we click the "View details" icon besides the name and title of the concerned space.
- ✓ We click "Administration" and "Manage my account" from the services list on left hand. We choose a second language for our space (English, in the example below). We save our choice and close the "Administration" page.
- ✓ We select "edit space properties" from the list of actions in the main page of the space (can be reached through "View details").
- ✓ We repeat this for each language we wish to add.



Adding properties to a multilingual space

The properties are edited as a two-column table. The column on right contains the just-added linguistic version while the column on left remains empty. The language we have chosen for the new translation appears at the bottom of the "edit properties" pane. In the example above, we add an English translation. As we wish to add also a German version, we cross again "Edit multilingual properties (...)" and select "German". Then we click "create multilingual space". So long as you cross the "Edit multilingual properties (...)", you are given the opportunity to add properties in other languages. Once you have created the title and description in all the languages you need, just press the "create multilingual space" without crossing this option any longer.



Now the space properties will be displayed in English for the members who will consult your IG in this language while the German or Italian speakers will be able to read the space title and description in their own language.

How to add content

You can learn how to load content in "[Add content into the Library](#)" (see *CIRCABC User guide*).

Deleting or recovering content

Deleting content

You display the properties of the content by pressing onto the "**View details**" icon (). Then pick the command "**Delete**" () out of the actions list of the "content properties" page. The "delete" function applies independently of the nature of the item (space as well as content). Detailed information can be found in "[deleting a sub-space](#)" (in "How to delete or recover sub-spaces").

Recovering deleted content


You select "**Manage deleted items**" from "**More actions**" in the top toolbar of the "Administration" service welcome page. Detailed information is provided in "[recovering deleted items](#)" (in "How to delete or recover sub-spaces").

Well! Now you are able to organise the spaces in your Library. As a leader, you can perform more complex actions.

How to deal with content versioning

About Versioning

Versioning means numbering a series of versions of a same content. What's more, "versioning" enables us to read both this content and its properties, at any state of its elaboration.

It is for you to make contents "versionable" (except multilingual contents, which are "versionable" by default). To make a content ready to receive a version number, you display its properties (via the icon ). You will notice, among other details, a pane dedicated to "**version history**". Such "version history" is set by default to status "**Allow versioning**".



Version properties before the content to be made "versionable"


By pressing on the link "**Allow versioning**", you initiate the versioning of the content. The properties page is refreshed and area "version history" is updated with a version number which is automatically incremented whenever a "check out" is applied to the content.



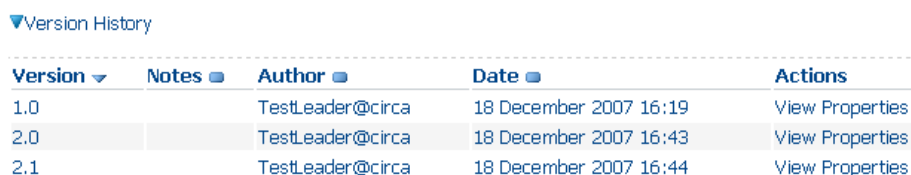
▼Version History				
Version ▼	Notes	Author	Date	Actions
1.0		TestLeader@circa	18 December 2007 16:19	View Properties
Page 1 of 1 				

The version history once user has clicked "Allow versioning"

How to follow up the versioning of a content

All the versions of a same content are listed in the "**version history**" section of the "content properties" page (accessible through icon ). Each of them comes along with:

- ✓ its number;
- ✓ notes;
- ✓ the name of its author;
- ✓ its creation date;
- ✓ access to the full text of the corresponding content (link "View");
- ✓ access to the properties of the corresponding content (link "properties").





▼Version History				
Version ▼	Notes	Author	Date	Actions
1.0		TestLeader@circa	18 December 2007 16:19	View Properties
2.0		TestLeader@circa	18 December 2007 16:43	View Properties
2.1		TestLeader@circa	18 December 2007 16:44	View Properties

How to follow up a document

In the above example, "2.0" corresponds to a major change while "2.1" represents a minor change.

The number of the current version can also be seen in the **content properties** (in "Details" view), under '**Version label**'.

Name:	2003_30_EC_2de.pdf
Content Type:	Adobe PDF Document
Encoding:	UTF-8
Title:	
Description:	
Author:	
Size:	120.89 KB
Version Label:	2.1
Auto Version:	Yes
Creator:	TestLeader@circa
Created Date:	14 December 2007 16:00
Modifier:	TestLeader@circa
Modified Date:	18 December 2007 16:44
status:	DRAFT
Issue date:	
reference:	
Security ranking:	PUBLIC
Expiration date:	

The current version is listed among the content properties

How to update, edit and modify a content

Updating a content

Detailed information is available in "[Update a document](#)" (*CIRCABC User guide*).

Check out/in

This process has been explained in "[Check out any content and check in](#)", (*CIRCABC User guide*).

How to deal with keywords

CIRCABC provides with the possibility to describe documents via a set of multilingual keywords defined by the interest group leader.

Those who may create content may apply keywords to the contents they upload or edit. This is only for the IG leader, however, to create this controlled vocabulary.

Managing keywords

This function allows you to create new keywords with or without related translations. The command "**Manage keywords**" can be reached from the "**Administration**" service (select "Administration" from the interest group main page).

Choosing "Manage keywords" takes you to a page titled "**Manage document keywords**" from which you can

- ✓ Capture new keywords
- ✓ Edit or delete the existing keywords

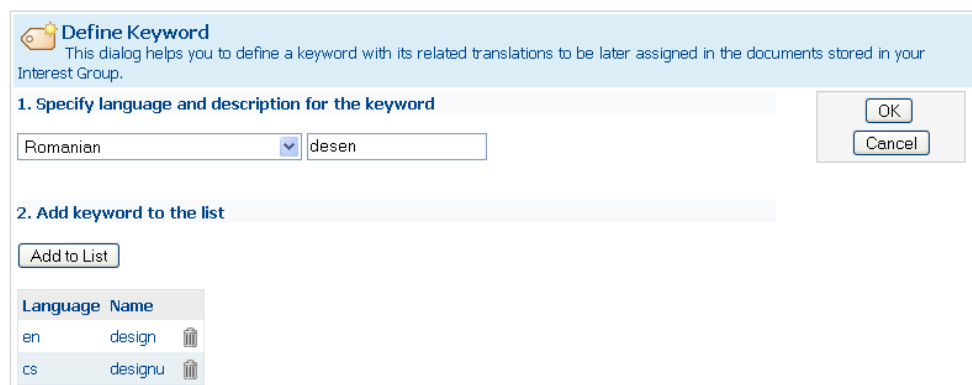


Keywords are managed by the IG leader from this page

Create keywords

We wish to add keyword "design" to our list of descriptors. Design is the English version of this term. We need to associate the equivalent Italian, Czech and Romanian keywords

On page "**Manage document keywords**", we click "**Define new keyword**" which leads us to page "Define keywords". Once there, we select a language, put the keyword in this language and press "**Add to list**". The new descriptor appears at the foot of the page. Then we repeat this action until we have added all the linguistic versions we need.



A new multilingual keyword is added

Just after having added the last translation we wanted, we finally press the **OK** button. We are taken back to the page "Manage document keywords" on which we can see the new keyword.

Manage Document Keywords
Manage the document keywords defined in this Interest Group.

[Define new keyword](#)

Keywords Defined

Language Filter: All Languages ▾ filter

Value ▾	Actions
Ausschuss der Regionen, alveiden komitean, Комитет на регионите, Committee of the Regions, Comité des Régions, Régiók Bizottsága, Coiste na Réigiúin, Regionsudvalget, Comitato delle regioni, Il-Kumitat tar-Regjuni, Regionų komitetas, Regionoide Komitee, Επιτροπή των Περιφερειών, Comitetul Regiunilor, Comité de las Regiones, Regiónu komitejas, Výbor regiónov, Odbor regij, Regionkommittén, Výbor regionů, Comité das Regiões, Comité van de Regio's, Komitet Regionów	
designu, design, design, desen	
Gol, Rad, But, Goal	
Medio ambiente, Ambiente, Околна среда, Περιβάλλον, Environnement, Environment	
Mexico, Messico, Mexique, Mexico	
onopatulaku, Keyword, Karustra	

The new keyword is displayed through the "All languages" filter

In the illustration below, we have asked for displaying the only keywords in Czech.

Manage Document Keywords
Manage the document keywords defined in this Interest Group.

[Define new keyword](#)

Keywords Defined

Language Filter: Czech ▾ filter

Value ▾	Actions
designu	
Rad	
Výbor regionů	

The only Czech version is shown

Edit keywords

Icons "Edit" () and "Delete" () allow you modifying your keywords from the "Manage document keywords" page.

To modify or delete only one linguistic version of a term, select the language you wish from "Language filter". All the descriptors which have been created in this language are listed under "value". Click the relevant icon besides the keyword you want to delete or modify. The corresponding dialog is launched.

- I would like to delete a descriptor I had created in several languages. Should I delete it language by language?
- Not at all. Just select "**All languages**" as "Language filter" on page "Manage document keywords".

Managing the Library users

The "**User management**" section deals with changing the rights for the whole Interest group. We shall now explain how to modify the role played by a Member in the only library or even a part of the Library.

Which roles for the Library?

Let us take an eye to the range of **roles** that may be offered to IG members in the Library:

No access: the access to the Library is denied.

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

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

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

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

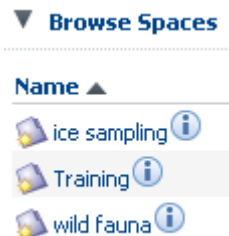
Administrate: basically, you have as many rights as the full-edit role. Additionally, you can delete any content. Moreover you can organise the Library and manage its users.

The roles in the library are related to the **access profiles** ([default](#) or created by yourself or any other Member administrator).

Changing a user's or access profile's role in a space of the Library

How to change role for an access profile

In the following example, the Library of the interest group "Antartica" contains three sub-spaces:



Spaces in the Library of the IG "Antartica"

The interest group leader wishes to allow any member with "Access" as an access profile to add their own documents in the space "Wild fauna" though they keep entering the rest of the Library with the role "Libaccess" (meaning that they can only read/download contents from the Library). So the role "Libaccess" of access profile "Access" will be changed to "manage own" only in the space "Wild fauna".

Invited users management on 'Antartica'
User 'admin' is the owner of the current space.
Invited users management.

Name	Username	Profile
WhiteOrso@circa	WhiteOrso@circa	Access
TestLeader@circa	TestLeader@circa	Reviewer
monfipa@cec	monfipa@cec	Author
Huskymir@circa	Huskymir@circa	IGLeader

User WhiteOrso can only read/download from the Library

We enter the Interest group. We go to the welcome page of the Library sub-space "Wild fauna". Once there, we choose **"Administration"/"manage space permissions"**.

The list of the members who have been granted a specific role in "Wild Fauna" is displayed.

User/Access-Profiles roles on: 'wild fauna'
User 'AdmiCtry@circa' is the current owner of this space.
Manage the permissions you have granted to users who access your space.

[Grant new user/access-profile](#)

Name	Username	Roles	Actions
WhiteOrso@circa	WhiteOrso@circa	Access	

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☒ Inherit Parent Space Permissions

No access profile has any role specific for "Wild fauna"

We click **"Grant new user/access profile"**. This launches the wizard which allows us to assign another role in the Library to an existing access profile.

Step One - Modify the access right
Modify the access right about this person or profile

General Properties

Profile: access Search

Results for 'access' in 'Profile'. Clear Results

Access

Select Role

LibAdmin
LibAccess
LibEditOnly
LibFullEdit
LibManageOwn

Add to List

name

Access (LibManageOwn)

Change role over a subspace of the Library

Having selected "profile", we look for access profile "access". Then we select role "LibManageOwn".

We confirm the changing role by pressing the button "next". This takes us to a second step through which you can notify all the IG members with profile "access". Such notification is optional.

At the end, the list of the access profiles specific for "wild fauna" is updated:



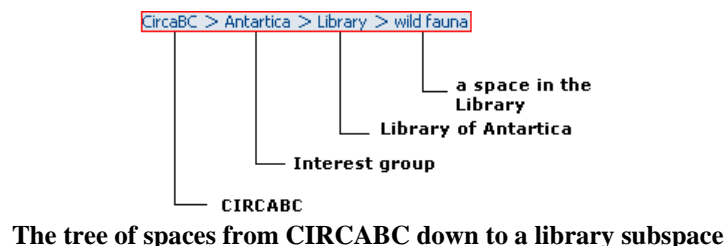
Now the concerned users can add content in "wild fauna" though they can only read/download from the rest of the Library.

How to invite a new user only to a specific sub-space of the Library

The same "**Manage space permissions**" procedure allows you to invite members of your interest group to one subspace of the Library with a role which does not match their access profile.

You browse to the sub-space of the library you wish to make accessible under specific conditions to some members of your interest group. Once you have reached the main page of this space, you click "**Administration > Manage space permissions > Grant new user/access profile**". The wizard which allows modifying the access rights is launched. You click "user" instead of "profile". You look for the one to who will be granted a role different from what his access profile provides.

For example, M Snowfriend is a biologist who is about to enrich the section "wild fauna" of the library of our interest group "Antartica".



We think that he should be able to add and edit content. But he is supposed to only read or download information from the other parts of the Library. Originally, M Snowfriend has been granted "Access" as access profile. In our IG, "Access" is a standard access profile which only allows the role "LibAccess" (read/download) over the Library. We change this role over space "Wild fauna", providing the role "LibFullEdit".

We follow the same procedure as explained above, selecting "user" rather than "profile" on the form "Modify the access right":

Step One - Modify the access right
Modify the access right about this person or profile

General Properties

User Search

Results for 'Mishka' in 'User'. Clear Results

Mishka Snowfriend (MS@socool.com)

Select Role

LibAdmin
LibAccess
LibEditOnly
LibFullEdit
LibManageOwn

Add to List

name

Mishka Snowfriend (LibFullEdit)

Providing an IG Member with a role specifically for one space

Then, we notify or not the concerned user. Later we click "Finish". The list of access profiles and users of the space "Wild fauna" is updated.

User /Access-Profiles roles on: 'wild fauna'
User 'AdmiCtry@circa' is the current owner of this space.
Manage the permissions you have granted to users who access your space.

Grant new user/access-profile

Users and Access-Profiles

Name	Username	Roles	Actions
Mishka Snowfriend	WhiteOrso@circa	LibFullEdit	
Access		LibManageOwn	


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☒ Inherit Parent Space Permissions

Close

M Snowfriend has role "LibFullEdit" instead of "LibAccess" on this library's subspace

M Snowfriend's access profile for the rest of the interest group remains unchanged. This means that he keeps playing the "LibAccess" role over the rest of the Library.



Users and Groups				Close
Name	Username	Profile	Actions	
WhiteOrso@circa	WhiteOrso@circa	Access		
TestLeader@circa	TestLeader@circa	Reviewer		
monfipa@cec	monfipa@cec	Author		
Huskymir@circa	Huskymir@circa	IGLeader		

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☐ Inherit Parent Space Permissions

M Snowfriend keeps having "Access" as access profile


That is all what you need for starting with the library management. Working in the Library, you or any of your IG members will also need to make searches. This is the main topic of next chapter.


Managing your interest group... What else?


About the notifications




As IG leader, you have a possibility to set up global notification status for any user and profile of your interest group. To check or edit your fellow-members' notification profiles, to define new profiles, you make use of option "Others' notification status". This is available from the "Administration" service main pages at the root of the interest group.

Selecting this command, you display a list of the notification profiles already created.

 **View Others' Notification Status on Astrophysics**
In the current location the following users have set its notification status.

 Only explicit SUBSCRIBED and UNSUBSCRIBED status are displayed. Default inheritance at the root of the interest group is "UNSUBSCRIBED".

 **Define Notification Status**

Type ▾	Username ▾	Notification Status ▾	Actions
Profile	DynPro2	Unsubscribed	
Profile	Author	Subscribed	
User	AstroAccess@circa	Subscribed	

Option "Others' notification status" displays the list of the global notification profiles

Define a new notification status

This allows you associating a notification status to some users and access profiles. *Providing the access profile "Contributor" with status "unsubscribed", for example, results in no contributor to receive any notification.* Keep in mind, however, the "contributors" who wish to get notifications anyway may bypass this status simply by subscribing notifications as "users" at the level of a service or lower.

Select the user/profile and assign it a Notification Status

Profile Search

Results for 'contrib' in 'Profile'. Clear Results

Contributor

Select Notification Status

Subscribed
Unsubscribed

Add to List

Type	Username	Notification Status	
Profile	DynPro2	Unsubscribed	
Profile	Author	Subscribed	
User	AstroAccess@circa	Subscribed	
Profile	Contributor	Unsubscribed	

The contributors will not get any notification

Remove a notification status

You call the "**Define notification status**" procedure to delete a status as well. You will find a small trash can besides each status.

Modify notification status

The action "**Edit status**" () on page "**Others' notification status**" allows you changing the notification status previously assigned to a user or group of users (access profile).

Edit the notification status of profile 'Author'

Subscribed
Subscribed
Unsubscribed


Turn the authors' notification status to unsubscribed


Dealing with dynamic document properties







CIRCABC provides default properties for the content and spaces you insert in your interest group. Now you may need additional properties, specific to your own documents. To help you customising your interest group, CIRCABC also offers the possibility to add what is called "dynamic properties". These properties apply to any kind of space (common space as well as dossiers) or content in the Library.

Where can I manage them from?

Having browsed to your interest group main page, you pick out "**Administration**" from the services list. You choose "**Manage dynamic document properties**" from the Administration's option list.

 **Manage Dynamic Document Properties**
Manage the dynamic document properties defined in this Interest Group

 [Click here to define a new property](#)

Name	Type	Languages	Valid Values	Actions
GoodOrBad	SELECTION	[en, bg]	good; BAD;	 
Targeted audience	TEXT_AREA	[en, fr]		 
sound track	SELECTION	[en, fr]	yes; no;	 

Take a look at your dynamic properties

You access a list of the dynamic properties already created detailing their name, type, value as well as the kind of actions you can run.

So you are ready to build new such properties.

Include additional properties in your documents

Follow link "**click here to define a new property**" from the page "**Manage dynamic document properties**". You reach the wizard for constructing your own document properties.

You are asked for adding a name, in as many languages as you need. Then, you associate a value to this name.

The last step is for verifying what you have entered and validate definitely or go back to first or second step in order to change anything.

We add a property showing in which of our catalogues our documents are referenced. We dispose of three catalogues which are "vegetables", "flowers" and "other seeds". The languages used by our interested group fellow members interested in classifying seeds are Danish, English, Italian and Maltese. All of our documents are supposed to be read in any of these languages.

So we create a dynamic document property titled "catalogue", with translations in the three other languages and which let users select one of our catalogues.

We capture the **property description** in all the languages we need so as "catalogue" is displayed in one language depending on the "content language filter" applied.

Steps
1. Define Descriptions 2. Specify Type 3. Summary

Step One - Define Descriptions
Specify language and description for the property

Maltese katalgu

List of descriptions per language

Language	Translation	
en	catalogue	
it	catalogo	
da	Sortsliste	

The property name will be displayed in one of these languages

In a second time, we take a **type** of property from

- ✓ Date field (expects for a date)
- ✓ Text field (one line of text will be entered)
- ✓ Text area (user puts several lines of text)
- ✓ Selection (user chooses between several possibilities).

Applying type "selection" implies an additional step. You must indeed indicate the items to be selected by users. Take care of putting one item per line in the dedicated textbox.

Steps
1. Define Descriptions 2. Specify Type 3. Summary

Step Two - Define the property type
Define the property type

1. Specify the property type

Selection

2. Specify valid values for the property

Flowers
Vegetables
Other seeds

Selection: take care of writing one item per line

The third step simply shows our record for review (press "back" until the step to be corrected) or definite validation (press "Finish").


Steps
1. Define Descriptions 2. Specify Type **3. Summary**


Step Tree - Summary
The information you entered is shown below.









Property type: Selection
Property description: (en) catalogue, (it) catalogo, (da) Sortsliste, (mt) katalgu

If you agree, press button "Finish"

The new property is now listed on the page "Manage document properties".


 **Manage Dynamic Document Properties**
Manage the dynamic document properties defined in this Interest Group

 [Click here to define a new property](#)


Name	Type	Languages	Valid Values	Actions
catalogue	SELECTION	[da, mt, it, en]	Flowers; Vegetables; Other seeds;	 
GoodOrBad	SELECTION	[en, bg]	good; BAD;	 
Targeted audience	TEXT_AREA	[en, fr]		 
sound track	SELECTION	[en, fr]	yes; no;	 



A new key is available for document analysis

It can be seen among the details of each content of the Library. To fill it retrospectively, you run the action "Edit content properties" from the "actions" list of the "view details" page of any content previously loaded. For all the contents you will load from now onwards, the property will be proposed on the "Modify content properties" page shown as a second step of the uploading contents.

 **Details of 'Baltic sea.jpg'**
View the details about the content.


▼Properties



Name:	Baltic sea.jpg
Content Type:	JPEG Image
Encoding:	UTF-8
Title:	Baltic sea.jpg 
Description:	
Author:	
Size:	55.48 KB
Creator:	AstroLead@circa
Created Date:	9 September 2008 10:47
Modifier:	tayotck@cec
Modified Date:	26 September 2008 15:40
status:	DRAFT
issue date:	
reference:	
keyword:	
GoodOrBad:	good
sound track:	no
Targeted audience:	herbalists, plant collectors, gardeners
catalogue:	Other seeds
Security ranking:	PUBLIC

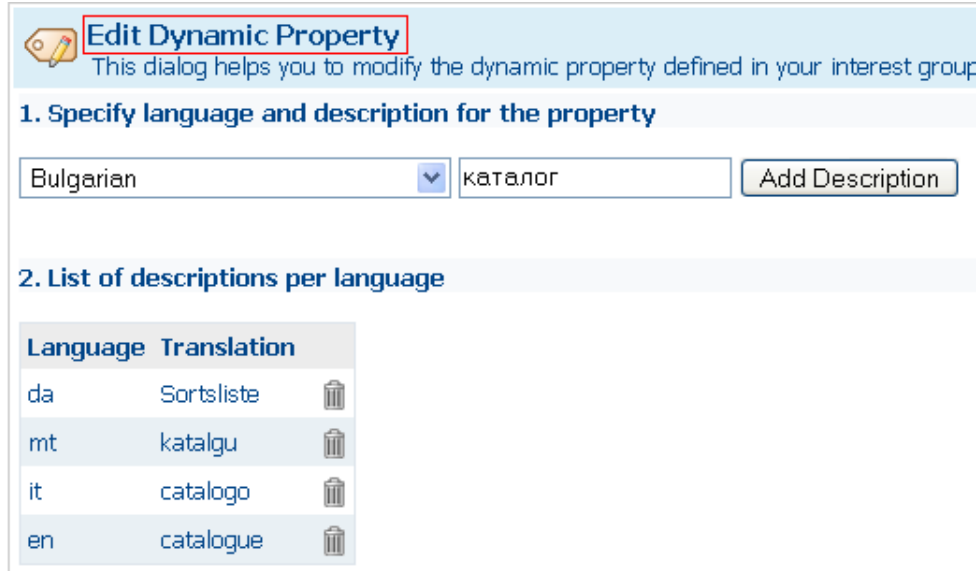
These properties only belong to our interest group

Remove a document dynamic property

You call the page "**Manage dynamic document properties**" and click the icon showing a small trash () , next to the property description. In so doing, you launch the "Delete" dialog.

Modify a document dynamic property

The action "**Edit property**" () on page "**Manage dynamic document properties**" allows you adding or removing translations. So, to modify the description in a language, you have to remove the concerned translation and create it again.







Edit Dynamic Property
This dialog helps you to modify the dynamic property defined in your interest group

1. Specify language and description for the property

Bulgarian ▼ каталог Add Description

2. List of descriptions per language

Language	Translation	
da	Sortsliste	
mt	katalgu	
it	catalogo	
en	catalogue	

We add a new translation

Now you can customise your library and describe your documents with your own criteria.
Next section will show how to deal with searching.

About the general and advanced search

Which kind of search?

The search engine explores both the properties and the contents of your IG content.

...You are telling about text search. But what about the items which consist exclusively of information other than text?

- No matter, such items are put in relation with textual data (their name or description, for instance). The search engine explores their name. What's more, the advanced search offers you to ask for the engine to select only files in a given format (sound, picture, email, etc).

The general search

The **general search** allows you to ask for text to be retrieved from the name and/or the informational content of any space or content.

The general search is run from the search box in the up right corner of the screen.

You will know more about how to deal with the General Search by reading "[About the general Search](#)" (*CIRCABC User guide*).

Build detailed queries with the advanced search

The general search enables you to perform the most frequent queries. Therefore, you can take advantage of the Advanced Search to execute finer searches.

The **advanced search** is purposed to building queries involving dates, time spans, specific file formats ... You can also use it in order to only search in specific sub-spaces.

You can find some more about how to deal with the Advanced Search in "[About the advanced search](#)" (*CIRCABC User guide*).

Save and re-use queries

CIRCABC enables you not to repeat iterative searches. You can save your general and advanced queries for further re-use.

This matter is explained in "[Save and re-use queries](#)" (*CIRCABC User guide*).

As a manner of conclusion

This Leader guide helps you to deal with the main features of CIRCABC Version 1.0. The CIRCABC Leader guide will be updated so as to match the evolution of CIRCABC. So, if encountering any difficulty, do not hesitate to take another look at it!