



EUROPEAN COMMISSION
DIRECTORATE GENERAL
for INFORMATICS



CIRCABC OSS

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.

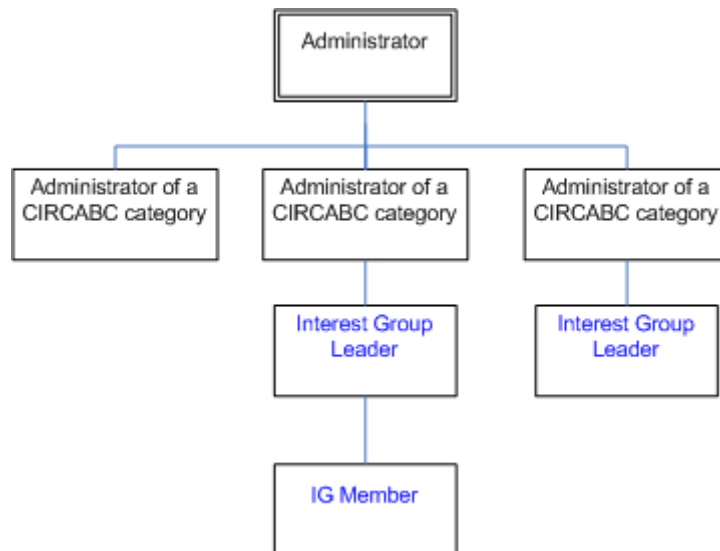
Guide main objective

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.
- the Interest Group members who have been granted administrative rights on any service.



The tree of responsibilities within CIRCABC

You have been granted **IG leader access profile or administrative rights** by:

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

¹ Further information on OSS is available at <http://www.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.

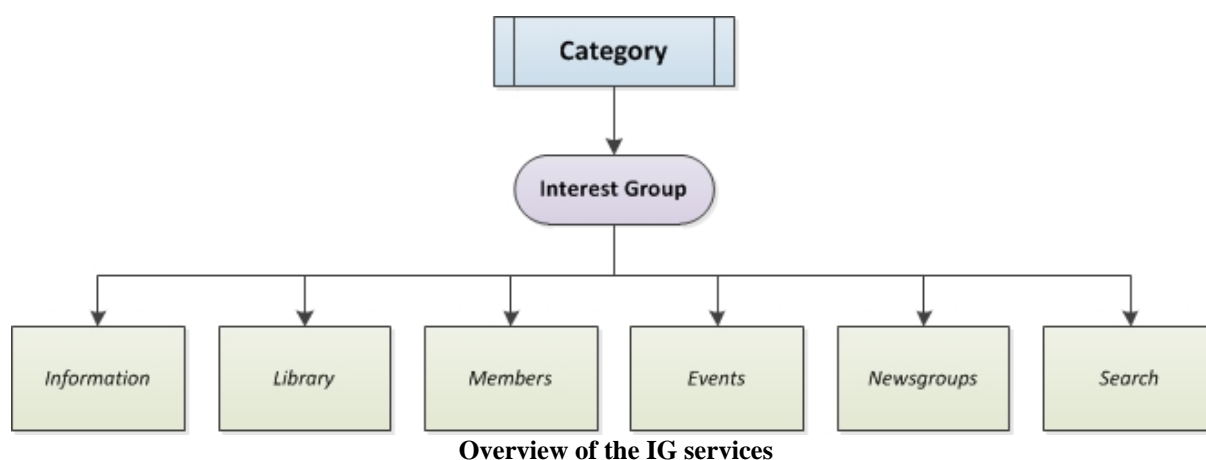
First-time leader

The administrator of a CIRCABC category or a leader of your interest group has assigned the profile 'Leader' to you..

First steps towards your interest group

The interest group (IG) you lead belongs to a category (CIRCABC category).

The interest group is characterized by a **group of users** (potentially unlimited), a set of **services** (Library service, Newsgroups, etc) and a series of **contents**.



Let us shortly present these services:

Information: to present your interest group as if it were a single website

Library: the place where your documents are stored

Members: lists the members of your interest group

Events: for scheduling and notifying events and meetings.

Newsgroups: enables to take part into or create discussions through forums potentially moderated.

Administration: provides with interest group management tools. Moreover, each service has its own administration page.

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



Any service can be reached from your interest group main menu

Who may access to your interest group?

You decide whether your interest group (or a part of it) will be public or reserved for membership.

[Every new interest group is only visible and accessible to its members.](#) You can change this by-default status through the service 'Administration'.

[Do not forget that the would-be members cannot see your group as long as you have not made it more widely visible. Consequently, they cannot apply for membership. You have to invite them.](#)

How to let people join your interest group

To get membership of any interest group, you must obtain:

- a login and password
- an access profile

To know more about the access profiles

About the access profiles

The access profile you allocate to new members defines how much actively they may 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 have membership 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 little permission.

You can define as many profiles as you wish. These are some examples:

Leader: they administer all the services of their interest group.
Author: they create, edit and delete contents (but may not delete the contents uploaded by other members). They may read and post news. They may only read the members' list.
Secretary: they administer the service 'Members'. They are unauthorised to the Library.
Access: they read and download from the Library. They can only read posts on the Newsgroups. They may only read the members' list.

Besides these standard profiles, you will find two additional ones:

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 (also called 'guests') have no username so that they cannot apply for membership. The interest group Leader, however, can set limited rights for public users.

About the roles

The roles are the smallest components of the access profiles. They are simple permissions.

Each access profile includes one role per service.

*The below table lists the roles allowed on the **Library**:*

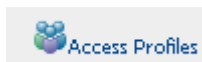
No-access: you cannot even read contents;
Access: read only; you can only download contents items as well as their properties;
Edit only: you can only edit any content item; you cannot create nor delete any.
Manage own: you can create, edit and delete your own contents. You can only read the documents 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.
Administer: you can manage the Library

How to manage access profiles

Define a new access profile

From the IG main menu:
[ADMINISTRATION > Access profiles](#)

From any other administration page:
[Go to Interest Group Administration Page > ADMINISTRATION > Access profiles](#)




Choose [Create access profile](#).



Enter a title and press on [Add to list](#). Then, you specify one role per service:

Library



Create a new Access Profile
Edit the access profile and click Finish to create it.

1. Specify profile titles

English

▼

Profil1

Add to List

Please to specify at least one Access Profile title.

2. Specify profile permissions

Service	Permission
Information	Manage Own ▼
Library	Administer ▼
Directory	Manage Members ▼
Events	Access ▼
Newsgroups	No Access ▼

To [add a multilingual profile](#), put the profile name, selecting its language from the left-hand list. Press on 'Add to list'. Repeat Step 1 for each new linguistic version.
Once you have entered the profile name in all of the languages you please, you complete Step 2 and confirm your choice by pressing 'OK'.

Library

Create a new Access Profile
Edit the access profile and click Finish to create it.

1. Specify profile titles

Bulgarian
▼

Add to List

Language	Name	
de	Profile	
en	Profile2	
fr	Profil2	

2. Specify profile permissions

Service	Permission
Information	Administer ▼
Library	Manage Own ▼
Directory	Access ▼
Events	No Access ▼
Newsgroups	No Access ▼

Modify an access profile

As an interest group administrator, you may

- ✓ Change roles on a profile
- ✓ Delete/add translated titles


From the IG main menu:
[ADMINISTRATION > Access profiles](#)


From any other administration page:
[Go to Interest Group Administration Page > ADMINISTRATION > Access profiles](#)





Change roles on a profile

Having clicked on 'Access profiles', you are taken to a page with a table whereon you can edit the roles of any profile (including IG leader).

You can change to more or to less permission on each service. To do so, just [click on icon](#) .

Profile Name	Information Role	Library Role	Directory Role	Event Role	NewsGroup Role	Actions
IGLeader	Administer	Administer	Administer	Administer	Administer	 
Secretary	No Access	No Access	Manage Members	Access	No Access	 
Access	Access	Access	Access	Access	Access	 
Profil1	Manage Own	Administer	Manage Members	Access	No Access	 
Profile2	Administer	Manage Own	Access	No Access	No Access	 

Keep in mind that the specific profiles 'Registered' and 'Guest' can only be set to either 'Access' or 'No Access'.

Registered	Access	Access	No Access	No Access	No Access	
Guest	No Access	No Access	No Access	No Access	No Access	

'Access profile' is also the page from which you will [make your interest group visible](#) to registered or public users.

Public/Registered Access Control

Public access to the Interest Group 'CIRCABC Leader 09-12' is currently:


Disabled 

Registered access to the Interest Group 'CIRCABC Leader 09-12' is currently:


Enabled 

Delete/add translated titles

Having clicked on 'Access profiles', you are taken to the list of the profiles listed in the language of the interface.

[Click on the icon](#)  at the end of the profile row.

On the area called 'specify profiles titles' you can delete existing translations or add new linguistic versions.

 **Edit the Access Profile 'Secretary'**
Edit the access profile and click Finish to apply changes.


1. Specify profile titles

French

▼

secrétaire

Add to List

Language	Name	
en	Secretary	







Press this button

Delete an access profile

You may delete the profiles which are not allocated to anybody.

On the example below, the profile, so-called 'Profil1' is not assigned to anybody while one member at least is accessing your group through profile 'Access'.
As a result 'Profil1' can be deleted whereas 'Access' cannot.

However, you may not delete the group called 'All_CIRCA_Users'

ALL_CIRCA_USERS	Access	Access	No Access	No Access	No Access	
Access	Access	Access	Access	Access	Access	 
Profil1	Manage Own	Administer	Manage Members	Access	No Access	  

- Can I delete any profile, really?
- You cannot delete the profiles 'registered' nor 'Public' (the 'delete' icon is not visible next to them).
As deleting the IG Leader, however, keep in mind that your group must contain at least one administrator. So, make sure that a different profile offers rights to administer the service 'Members' and the Library.

Now, you are ready to invite newcomers to take membership.

How to invite a new user to your interest group

You can add new members to your group

- ✓ By inviting registered users;
- ✓ By sharing a group of users with other interest groups of your category.

Invite users to your interest group

Anybody who has been granted with either the 'Manage Members' or 'Administer' role over service 'Members' can invite users and applicants to join the interest group. Bear in mind, however, that those who have the 'Manage members' role can only invite users. They are unable to create, modify neither delete 'Access profiles'.

A same user may get membership of several interest groups.

Whom to invite?

Users can be invited in two manners:

- ✓ A registered user contacts you through the 'Apply for Membership' procedure (see 'Apply for Membership' in the *CIRCABC User guide*);
- ✓ You invite a user on your own initiative.

Invite someone having applied for Membership.

A would-be member 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:

From the IG main menu:
[ADMINISTRATION > Member applicants](#)

From any other administration page:
Go to Interest Group Administration Page > [ADMINISTRATION > Member applicants](#)



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

CircABC > Category12 > IntergroupX12

Applications for membership
The table below shows the users who have applied for membership on IntergroupX12 Interest Group.

Name	Date	Message	Actions
Category10 Category10	22 September 2008	Hello, I would be so happy to share lessons of experience with you. Yours faithfully, M Greenyard	Refuse All Accept All

Page 1 of 1

You can opt for accepting or refusing to grant membership.

Invite someone who has not applied for membership.

You are free to invite anyone who has a CIRCABC username. You can define as many accounts as you need.

How to create a new CIRCABC user


- ✓ you can ask people to register
- ✓ you can create usernames by yourself

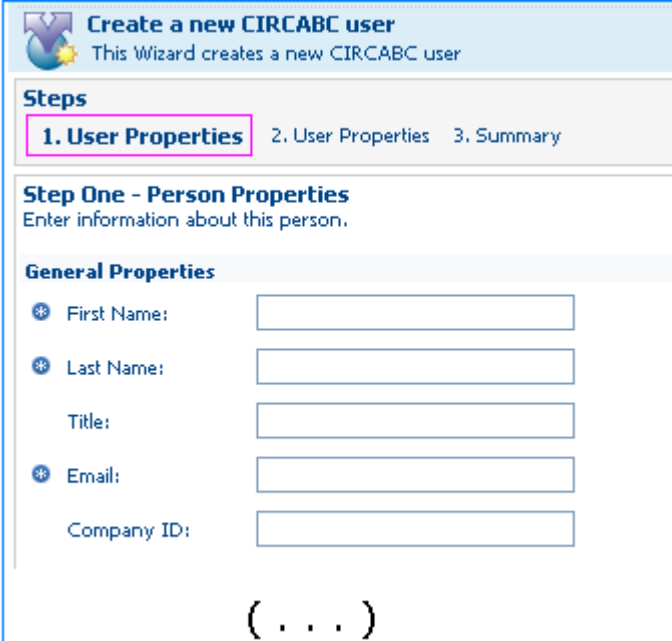
To create new usernames:

From the IG main menu:
[ADMINISTRATION > Create a new CIRCABC user](#)

From any other administration page:
Go to Interest Group Administration Page > [ADMINISTRATION > Create a new CIRCABC user](#)



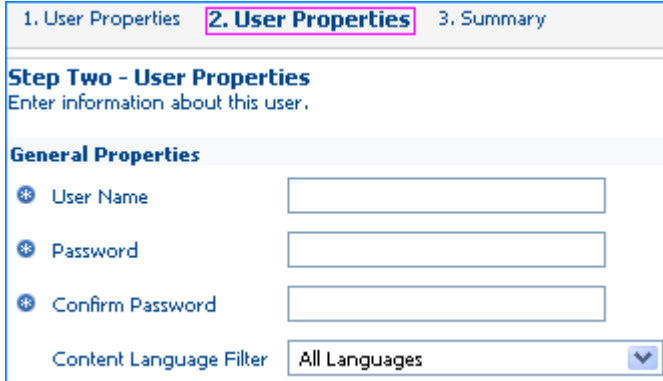
- ✓ To follow the link "Create a new CIRCABC user" takes you to the first step of the user-creation wizard. You put the user personal information. The mandatory data-fields are pointed out by the star sign (). You press "Next" to reach the second step.



The screenshot shows the 'Create a new CIRCABC user' wizard. The title bar says 'Create a new CIRCABC user' and 'This Wizard creates a new CIRCABC user'. Below the title bar is a 'Steps' section with three steps: '1. User Properties' (highlighted with a pink box), '2. User Properties', and '3. Summary'. The main content area is titled 'Step One - Person Properties' and 'Enter information about this person.'. Under the 'General Properties' section, there are five input fields: 'First Name:' (with a star icon), 'Last Name:' (with a star icon), 'Title:', 'Email:' (with a star icon), and 'Company ID:'. Below these fields is an ellipsis '(. . .)'.

Add the personal information for this user and press on NEXT

- ✓ On step two, you define a username and password. The username must contain between 5 and 32 characters. The password will be at least 8 characters long. You will choose from three out of four different groups (small caps, big caps, some special characters, digits...).



The screenshot shows the 'Create a new CIRCABC user' wizard, Step Two: User Properties. The title bar says '1. User Properties', '2. User Properties' (highlighted with a pink box), and '3. Summary'. The main content area is titled 'Step Two - User Properties' and 'Enter information about this user.'. Under the 'General Properties' section, there are four input fields: 'User Name' (with a star icon), 'Password' (with a star icon), 'Confirm Password' (with a star icon), and 'Content Language Filter' (a dropdown menu with 'All Languages' selected). Below these fields is a dropdown menu with 'All Languages' selected.

Choose also the language this user would like to read documents in

- ✓ Step three provides you with a summary of the creation

1. User Properties 2. User Properties 3. **Summary**

Summary
The information you entered is shown below.


Name:	Pierro Dallaluna
User Name:	pierross
Password:	*****
Home Space:	CircaBC

How to invite a new user

To invite users:

From the IG main menu:
[ADMINISTRATION > Invite User](#)

From any other administration page:
[Go to Interest Group Administration Page > ADMINISTRATION > Invite User](#)



The 'Invite CIRCABC user' dialog is launched and you follow the below steps:

- ✓ 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 group. This step is optional (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 on 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

All Users [v] [Search]

All Users
Applicants

Whom to invite?

You can look up people by

- first name
- last name
- username
- email address (provided that you type the '@' character).

Having selected a user, you allocate 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

Interest Group Leader
Author
Contributor
Reviewer
Secretary

Which access profile?

Once you have chosen both a user and an 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) [trash icon]

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.

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

- Can I select more than one user at a time?
- Yes, 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'.

4. Notify the invited users that, as from now, they are members of your IG. This is optional.

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

Use 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.

share a group of users with other interest groups of your category

A different way to add members to your group consists in sharing a group of users with another interest group of your category. You do so whenever you **export/import access profiles** (access profile meaning a group of users, all of them with the same access rights).


Export a profile

The administrators of the 'Members' service (so, those with 'administer' as access right on this service) may export a profile. In other words, they make a group of members of their own group ready to be included in different interest groups of the same category, all of them with a same access profile.











To export a profile:

From the IG main menu:
[ADMINISTRATION > Access profiles > Export](#)

From any other administration page:
[Go to Interest Group Administration Page > ADMINISTRATION > Export](#)

Icon 

List of defined profiles

Profile Name	Information Role	Library Role	Directory Role	Event Role	NewsGroup Role	Actions
Access	Access	Access	Access	Access	Access	 
Author	Access	Full Edit	Access	Access	Access and Post	  
Contributor	Access	Access	Access	Access	Access and Post	   
Registered	No Access	No Access	No Access	No Access	No Access	
Guest	Access	No Access	No Access	No Access	Access	
Reviewer	Access	Edit Only	Access	Access	Access and Post	  

Export this profile

Just press on the icon. The profile is now marked with icon (LX) which means that

- ✓ it is available for the other groups of the category
- ✓ you can revert to the status 'not exported'

In a same time, an application message confirms that the profile has been successfully exported.

You can export as many profiles as you need.

Import a profile

The administrators of the 'Members' service (so, those with 'administer' as access right on this service) may import any profiles.


To import a profile:

From the IG main menu:
[ADMINISTRATION > Access profiles > Import](#)

From any other administration page:
[Go to Interest Group Administration Page > ADMINISTRATION > Import](#)




You select an item from the list of the profiles available for importing. You confirm by pressing on the 'Import' button.

Import a profile

Import a profile: 


- Select one
- IG-Source:Profilator
- IntergroupX12:Access
- IntergroupX12:Reviewer**

The profile is listed on the below part of the 'Manage access profiles' screen.. It is shown with, before it, the name of its source interest-group.

List of imported profiles						
Profile Name	Information Role	Library Role	Directory Role	Event Role	NewsGroup Role	Actions
IntergroupX12:Reviewer	No Access	No Access	No Access	No Access	No Access	  

Profile 'Reviewer' is still available in the interest-group 'intergroupX12'

Now, you have to set the rights you want to allocate to this new group of users. This does not the source profile.

To undo the import, just click on the icon .

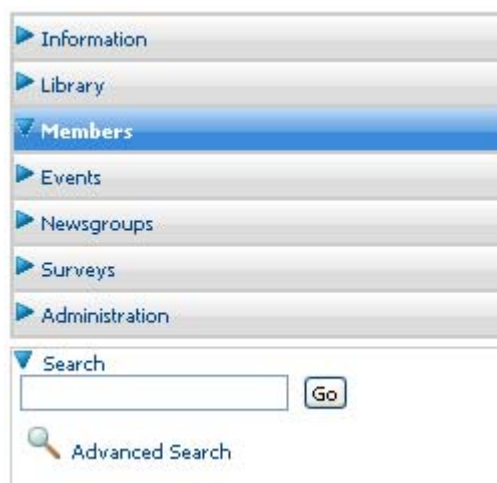
Keep in mind that you should not delete an interest group so long as some of its profiles are imported by other groups.

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 or even limit the exploration to one profile.

Search for members

Search for:

Filter by:

List of members

Surname	Firstname	Access Profile	Actions
BLACKDUST	Stella	Author	

Look up a member from any user domain

How to remove membership

You can remove membership from your own interest group. This does not affect the memberships removed members may have on 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 administrator**.

To remove membership:


From the IG main menu:
[ADMINISTRATION > Access profiles > Membership](#)

From any other administration page:
[Go to Interest Group Administration Page > ADMINISTRATION > Membership](#)
















Membership

You are taken to your interest group members list. Click the **Remove** icon () next to the member to be removed.

Profile filter

Filter on a specific Profile: <All profiles> 

Users and Profiles

Name ▼	Email	Profile	Actions
 Jim QUARCK	AstroClo2@gmail.com	Access	 
 Stella BLACKDUST	AstroClo0@gmail.com	Leader	 
 Pierre BEAUREGARD	Pierre.BEAUREGARD@ext.ec.europa.eu	Leader	 
 Bernice NÉBULE	AstroClo1@gmail.com	Author	 
 Claudine TAYOT	Claudine.TAYOT@ext.ec.europa.eu	Leader	 

From this view, you can remove or change access profiles

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

How to change a member's access profile

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 administrator**

Those who are provided the **Manage 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 modify membership:

From the IG main menu:
[ADMINISTRATION > Access profiles > Membership](#)

From any other administration page:
[Go to Interest Group Administration Page > ADMINISTRATION > Membership](#)



You are taken to your interest group members list. Choose the user whose access profile has to be modified. Click the **change** icon () next to the user's name and profile.

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

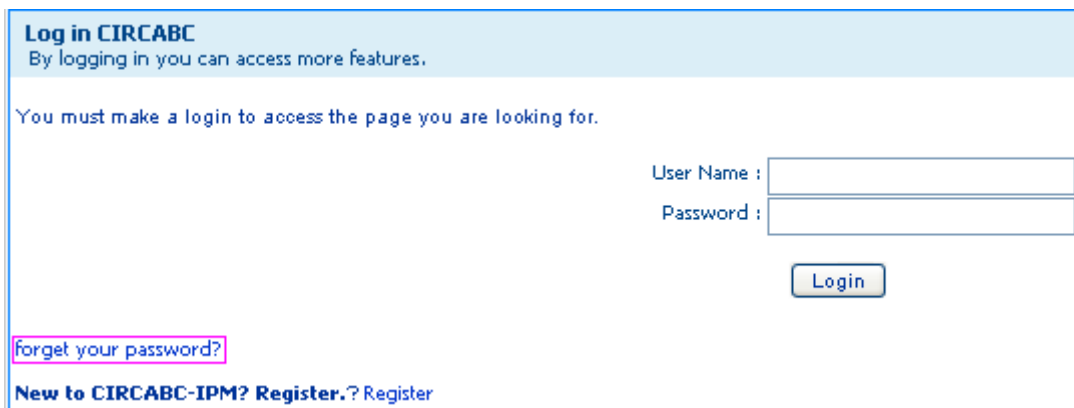
Help users with lost access codes

Help users with lost password

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

Self-Resent password

A user who has lost password follows the 'Forgot your password?' link from the LOGIN page. **You do not take any part in this procedure.**



Log in CIRCABC
By logging in you can access more features.

You must make a login to access the page you are looking for.

User Name :

Password :

[forgot your password?](#)

New to CIRCABC-IPM? [Register.](#) ? [Register](#)

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

The Library's corner

As a leader, you **administer the Library**. But you may share such permission with other members of your interest group. So, **anybody assigned with the 'Administer' role over the Library is able to manage this service**.

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

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*.

Organising a Library

Creating 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 '**Administer**', '**Full-edit**' and '**Manage-own**' roles enable to create 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

To recover deleted spaces:

From the IG main menu:
LIBRARY > Administration > Manage deleted items

From any administration page:
Go to the Library Administration Page > Manage deleted items



Are there restrictions in recovering spaces?

Those only who administer the Library can recover deleted spaces.

How to retrieve deleted items

You have reached the **Manage deleted items** page. You can search using various criteria.

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

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 definitely delete 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'.


 Recover Listed Items  Delete Listed Items

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?










 You may select a destination where you wish the recovered items to be placed. If you do not select a destination, the original location of the item is used. Recovery of an item may fail if the destination does not exist or you do not have permission to add items there.

Destination:

-  Go up
-  User Homes
-  LookandTry
-  secret

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 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	 

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

'Whynot' is now listed as a sub-space of space 'Secret'

Sharing spaces of the library

What does it mean?

One or more spaces of the Library can be shared with one or more other interest groups, all of them belonging to a same category.

Pay attention, however, that the top-level structure of the Library cannot be shared.

Who can manage the space sharing?


Users with role '[Administer](#)' over the Library of the host interest group can invite different interest groups to link to spaces of their Library.

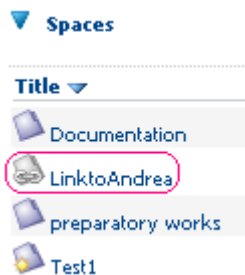
Users with role '[Administer](#)' over the Library of the guest interest group can set links to spaces on the Library of different interest groups.

Who can access shared spaces?

A shared space can be only accessed by:

- ✓ the members of its own interest group;
- ✓ the members of the invited interest groups
- ✓ any other user who has been granted the right to access the Library of both the 'guest' and 'host' interest group.

- How can I recognise that a space is pointing to a shared space?
- It is labelled with the icon 'paste as link' () in the Library of the 'guest' interest group.



Who is in charge of what?

As a Library administrator you can:

- ✓ check whether a space is shared or not;
- ✓ open a space of your Library to the members of different interest groups;
- ✓ modify the access permissions set to shared spaces;
- ✓ remove an invited interest group from the space sharing
- ✓ Link a space of your Library to a space hosted by a different interest group.

The other users can

- ✓ access the shared space depending on the access rights granted by the Leader of the host interest group.

Invite an interest group to link to a space of your Library

To invite an interest group to share a space you are creating :

From the 'Spaces' pane, depending on how the Library is customised:
Standard 'look & feel'

[LIBRARY](#) > [Create space](#) > tick case 'Share the space' > [Invite IG to share this space](#)

Share the space: 

To invite an interest group to share a space existing on your Library :

From the 'Spaces' pane, depending on how the Library is customised:
Standard 'look & feel'

[Spaces pane](#): icon  > [Manage shared space](#) > [Invite IG to share this space](#)

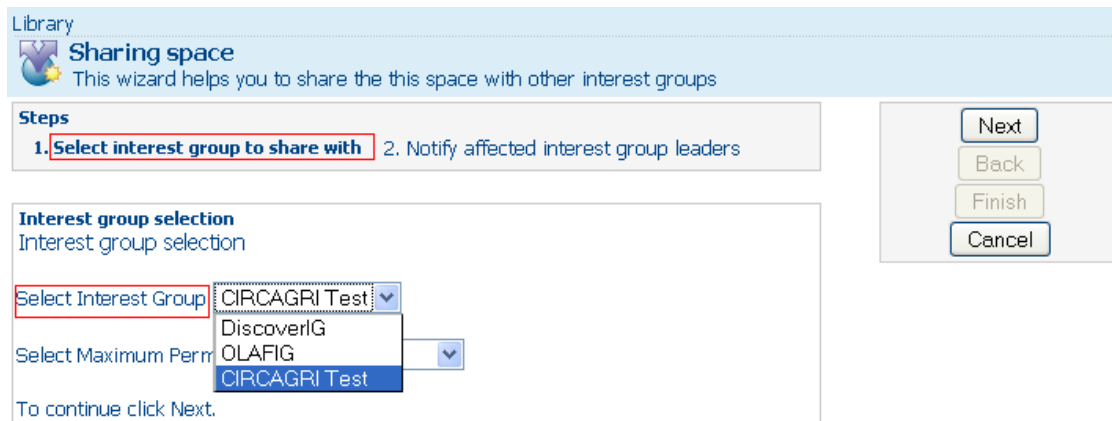
navigation preferences including icons to space sharing:

[Spaces pane](#) > icon  > [Invite IG to share this space](#)

On the page **Manage shared space**:

You are proposed

- ✓ to choose a 'guest' interest group



The members of 'CIRCAGRI Test' will be able to access the current space of 'Astronomy'

- ✓ to set the highest level of permission to be allocated to the members of the invited interest group
The library administrator of the host interest group grants the members of the guest interest group with access permissions:

Library

Sharing space

This wizard helps you to share the this space with other interest groups

Steps

1. **Select interest group to share with**
2. Notify affected interest group leaders

Interest group selection
Interest group selection

Select Interest Group: CIRCAGRI Test

Select Maximum Permission: LibAccess

To continue click Next.

Next
Back
Finish
Cancel

Whatever their original role is, the members of 'CIRCAGRI Test' cannot access the current space with a role higher than the one you set

If 'access' is selected as the right to access to the shared space every members of the guest interest group, whatever be their access profile, cannot do anything on this space but read and download.

If 'manage own' is defined,

- ✓ all of those who have been provided with the role 'access' on the Library of the guest interest group will keep the role 'access' on the shared space
- ✓ all of those who have a role higher than 'manage own' on the Library of the guest interest group ('full edit' for instance) will access to the shared space with the only role 'manage own'.

'Manage own' is the permission granted on the shared space	
Guest interest group	Host interest group (shared space)
Role ACCESS	Role ACCESS
Role EDIT ONLY	Role EDIT ONLY
Role MANAGE OWN	Role MANAGE OWN
Role FULL EDIT	Role MANAGE OWN
Role ADMINISTER	Role MANAGE OWN

- ✓ Optionally, you notify the Library administrators of the guest interest group.

The space is now open to consultations from the guest interest group while the rest of your Library remains available for the only members of your interest group.

How to link up to another interest group

Your interest group has been invited to share a space of the Library of another interest group. Now, you must link a relevant space of your Library to the targeted space on the host interest group.

To link to a space on the host interest group:

From the guest interest group
LIBRARY > Create space > Tick 'Share space link'

Space type:

☐ Space

☐ Dossier

☒ Share Space Link

You give a title to the linking space. Then you complete the stages illustrated below:

- ✓ A selection box shows the spaces available for sharing. You choose the space you would like to link to.

Share space link options

* Select a shared space:

The space 'Come on and read' of group 'Leonatest' will be accessible from the group 'Testfs'

- ✓ You press on button 'Create space'

A linking space is created. Its details show the path to the shared space.

> European Commission > CIRCABC > CIRCABC Training > testfs

Library

Details of the link Link to Come on and read.url
View the details about the link.

Properties



Title:	Go and see
Description:	Link to Come on and read.url
Name:	Link to Come on and read.url
Link Destination:	/Library/Come on and read
Creator:	CIRCABC SUPPORT
Created Date:	5 January 2011 14:37
Modifier:	CIRCABC SUPPORT
Modified Date:	5 January 2011 14:38

Now the space on the host interest group is shared with the members of the guest interest group

How to remove an interest group from the space sharing?


You can at any time remove your interest group from the file sharing.

Your own interest group welcomed others


To remove invited groups from the space sharing:

From the 'Spaces' pane, depending on how the Library is customised:

Standard 'look & feel'

Spaces pane: icon  besides the shared space > Manage shared space > click on the dustbin
besides the group to be removed

navigation preferences including icons to space sharing:

Spaces pane > icon  besides the shared space > click on the dustbin besides the group to be
removed

Your interest group is guest of another

To remove a link to a shared space :

From the 'Spaces' pane, depending on how the Library is customised:

Standard 'look & feel'

Spaces pane: icon  besides the linking space > Action 'Delete'  Delete

navigation preferences including the 'delete' icon:

Spaces pane > icon  besides the linking space

Managing the content of a library

As an administrator 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

CIRCABC 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 yet available, you have an opportunity to read its properties in your language.

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

How to add content

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

About bulk downloading

The contents are downloaded to a zipped archive along with an index file. The so-called 'index.txt' file contains the properties of the contents stored in the archive.

How to bulk download in three steps:

- select and copy contents
- click on link 'download all' from the clipboard
- open or save the resulting zip file

About bulk uploading

You could like to upload a series of documents all at one time. You will find a detailed explanation in the CIRCABC User guide.

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').


How to deal with content versioning

About Versioning

The contents are versioned, automatically. Any document, as soon as uploaded (or pasted from a different space), is shown as 'version 1.0'.

▼Version History				
Version ▼	Notes	Author	Date	Actions
1.0		TestLeader	18 December 2007 16:19	View Properties
Page 1 of 1 ◀ ◁ 1 ▷ ▶				

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	18 December 2007 16:19	View Properties
2.0		TestLeader	18 December 2007 16:43	View Properties
2.1		TestLeader	18 December 2007 16:44	View Properties

'2.0' corresponds to a major change while '2.1' represents a minor change

The number of the current version can also be seen on 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 contents

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*).

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.

- What is this for?
- You can, for instance, forbid the access to a specific space for some users while others will read only and some will upload documents.

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.

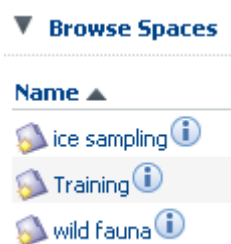
Full edit: you can create contents; you can edit any content whoever owns it. But you can delete only your own contents.

Administer: 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.

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'

Problem:

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 'Access' (meaning that they can only read/download contents). Those who are 'Authors', as for them, will not be allowed to upload into this space. They will read only (while keeping able to upload, edit and delete on thhe rest of the Library).

The registered and guest users, although being allowed to download from the library (role 'access' on the Library) should not see the space Wild Fauna.

Resolution:

- ✓ *the role 'Access' of access profile 'Access' will be changed to 'manage own' on the space 'Wild fauna';*
- ✓ *The role 'full edit' of profile 'Author' becomes 'access';*
- ✓ *Nothing changed on profile 'registered'*

To manage the rights to a specific space:

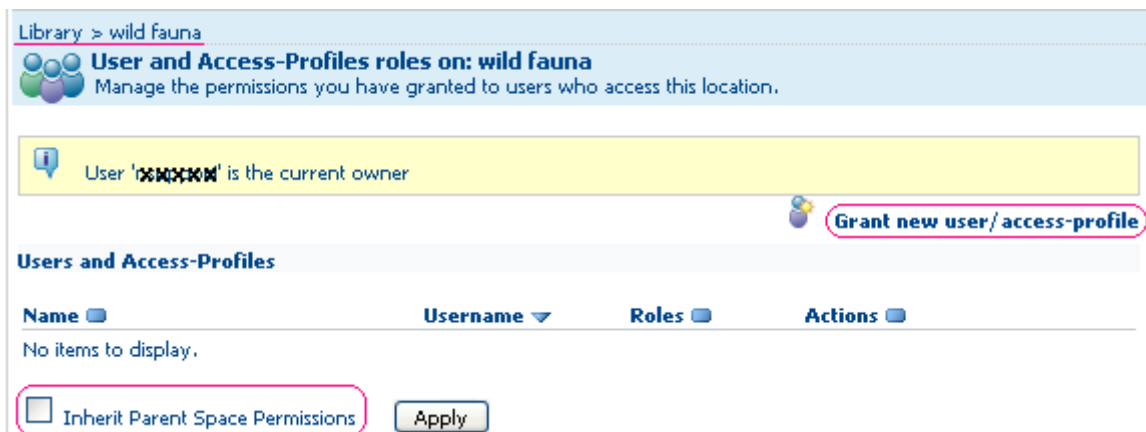
From the 'Spaces' pane, click on the space name/title. Then:

[Administration > Manage permissions](#)



The list of the access profiles is displayed. You will

- ✓ Tick off the option '[inherit parent space permissions](#)'
- ✓ Follow the link titled '[Grant new user/access-profile](#)'



The inheritance is deactivated: no profile can access any longer

You are taken to the 'Change rights' page. For each profile which is supposed to access to this space, you will:

- ✓ Select the profile
- ✓ Provide it with the role it should play on the space

You can repeat this operation as many times as you please, pressing on 'Add to list' after each selection of a pair profile/permission.

The profiles which are not selected cannot access to the space.

Once done, press on 'Next': you are proposed to notify the affected users.

At last, you press 'Finish'.

To complete the resolution above:

Select profile 'Access' and assign the right 'Manage own' to it

Select profile 'Author' and assign the right 'Access' to it

Do not select 'Registered' neither 'Guest'

Select the other profiles which should access without any change, and provide them with their initial role.

Library > wild fauna

Change access right

This wizard updates the access rights.

Steps

1. Step One - Modify the access right
2. Notify invited users

Step One - Modify the access right

Modify the access right about this person or profile

General Properties

Profile Search

Results for " " in 'Profile'. Clear Results

- Registered
- Guest
- Contributor
- Author
- External
- Access
- Secretary
- migrateur

Select Role

- Manage Own
- Edit Only
- Full Edit
- Administer
- Access

Add to List

Name
Access (LibManageOwn)
Author (LibAccess)
Contributor (LibAccess)
Leader (LibAdmin)

No access to this space for 'Registered' and 'Guest'

Once you have pressed on 'Finish', you can check the list of members or profiles allowed to access to this space.

Library > wild fauna

User and Access-Profiles roles on: wild fauna
Manage the permissions you have granted to users who access this location.

User 'nsupoci' is the current owner.

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

Users and Access-Profiles

Name	Username	Roles	Actions
Access		LibManageOwn	
Author		LibAccess	
Leader		LibAdmin	
Contributor		LibAccess	

☐ Inherit Parent Space Permissions [Apply](#)

Some more about the inheritance process

The rights to access the space are inherited from the first level up (root of the library or parent space). If the role you choose, at a lower level, are opposite to what is allowed at the highest level, the strongest rights take priority over the weakest. This means that in our example, keeping the inheritance activated would result in the following status for 'Access' and 'Author':

- ✓ The profile 'Access' would be given permission for accessing with 'manage own' rights on the space 'Wild fauna' while visiting the other parts of the Library in read-only mode.
- ✓ Although having been given the role 'Access' for 'Wild fauna', the profile 'Author' would access to it with its initial 'Full-edit' role. This because the role 'Full edit' takes precedence over the role 'Access'.

The reasons why you might have to tick off 'inherit parent space permissions', on a space, are:

- you have to assign to a profile a role lower than what is provided at the level of the parent space (or Library)
- some profiles should not see this space

The disadvantage of ticking off 'inherit parent space permissions' is that you have to invite to the space all of the users or access profiles which are supposed to access to it. You do that via the 'change rights' page (in the example above, 'Leader' and 'Contributor' are re-invited but receive their initial roles). This conditions their ability

How to give a single member specific permission for accessing a 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.

To modify, on a single space, the permission for accessing to the Library, without modifying the member's profile:

From the 'Spaces' pane, click on the space name/title. Then:

[Administration](#) > [Manage permissions](#)



The wizard for changing the access rights is launched. You click '[user](#)' instead of 'profile'. You look up the member and allocate a new role to him.

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](#)'.

To define a notification status:

From the root of the interest group, for the whole group
From the root of the Library or Newsgroups, for the whole Library or Newsgroups
From the main page of the space, for a single space

[ADMINISTRATION](#)> [Notification status](#)

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

Library

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

Close

Note that only SUBSCRIBED and UNSUBSCRIBED status are displayed. Users and profiles with the INHERITED status are not shown.

Define Notification Status

Type ▼	Name	Notification Status	Actions
User	beaurpi	Unsubscribed	
User	AstroLead	Subscribed	

Page 1 of 1

The notification profiles set on the Library

Define a new notification status

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

To add users or profiles to a notification list:

From the root of the interest group, for the whole group
From the root of the Library or Newsgroups, for the whole Library or Newsgroups
From the main page of the space, for a single space

[ADMINISTRATION](#) > [Notification status](#) > [Define notification status](#)



Select the user/profile and assign it a Notification Status

Profile

Results for 'contrib' in 'Profile'. [Clear Results](#)

Select Notification Status

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

To change a notification status:

From the root of the interest group, for the whole group
From the root of the Library or Newsgroups, for the whole Library or Newsgroups
From the main page of the space, for a single space

ADMINISTRATION > Notification status > action '**Edit status**'



You are proposed one option out of three:

'Inherited' means that users keep their by-default status (assigned for the whole group)

About keywords

CIRCABC allows users to describe documents via a set of multilingual keywords defined by the interest group leader.

Those who may create content may add keywords to the contents they upload or edit. This is only for the Library administrators, however, to create this controlled vocabulary.

Managing keywords

To define new keywords:

From the IG main menu:
[ADMINISTRATION > Keywords](#)

From any administration page:
[Go to the interest group administration page > Keywords](#)



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

- ✓ Type new keywords (optionally along with translations)
- ✓ Edit or delete the existing keywords

 **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 Réigiún, Regionsudvalget, Comitato delle regioni, Il-Kumitat tar-Reġjuni, Regionų komitetas, Regionide 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	 
Gol, Rad, But, Goal	 
Medio ambiente, Ambiente, Околна среда, Περιβάλλον, Environnement, Environment	 
Mexico, Messico, Mexique, Mexico	 
onopatulaku, Keyword, Karustra	 

Keywords are managed by the IG leader from this page

Create keywords

We wish to add the keyword 'design' to our list of descriptors. We also need to associate the equivalent Italian, Czech and Romanian keywords

To create keywords:

From the IG main menu:
[ADMINISTRATION > Keywords > Define new keywords](#)

From any administration page:
[Go to the interest group administration page > Keywords > Define new keywords](#)



From the page 'Define keyword', you select a language, put the relevant keyword and press '[Add to list](#)'. You repeat these actions until you have added all the linguistic versions you please. Finally, you press '[OK](#)'.

A new multilingual keyword is added

You are taken back to the page 'Manage document keywords' whereon you can see the new keyword.

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

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

 **Manage Document Keywords**
Manage the documentd keywords define in this Interest Group.

 [Define new keyword](#)



Keywords Defined

Language 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' before clicking on 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 the page 'Manage document keywords'.

Dealing with dynamic document properties

CIRCABC provides default properties for the content and spaces you insert into your interest group. Now you might 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**'.

Where can I manage them from?

To create, edit or delete dynamic properties:

From the IG main menu:
[ADMINISTRATION > Dynamic properties](#)

From any administration page:
[Go to the interest group administration page > Dynamic properties](#)



You access to the list of the dynamic properties already created. You are ready to add new or modify the existing 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
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

Include additional properties in your documents

To create new properties:

From the IG main menu:
[ADMINISTRATION > Dynamic properties > Define new property](#)

From any administration page:
[Go to the interest group administration page > Dynamic properties > Define new property](#)



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

We add a property for our catalogue references. We maintain three catalogues which are 'vegetables', 'flowers' and 'other seeds'. These may be read by Danish-, English-, Italian- and Maltese-speakers.

So we create a document property titled 'catalogue' and available in the above-listed languages.

We capture the **property description** in all the languages we need. So, 'catalogue' will be displayed in one language or another, 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 ▼ katalogu Add Description

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
- ✓ Text field (one line)
- ✓ Text area (a paragraph)
- ✓ Selection (user chooses between several options).

If using the type 'selection' 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') 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](#)' ('contents' pane of the parent space > 'view details' >

'Edit content properties'). For all the contents you will upload from now onwards, the property will be proposed through the page 'Modify content properties':

 **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:	tayotcl@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

To remove such an extra property:

From the IG main menu:

[ADMINISTRATION](#) > [Dynamic properties](#) > icon 

From any administration page:

[Go to the interest group administration page](#) > [Dynamic properties](#) > icon 

Modify a document dynamic property

To edit such an extra property:

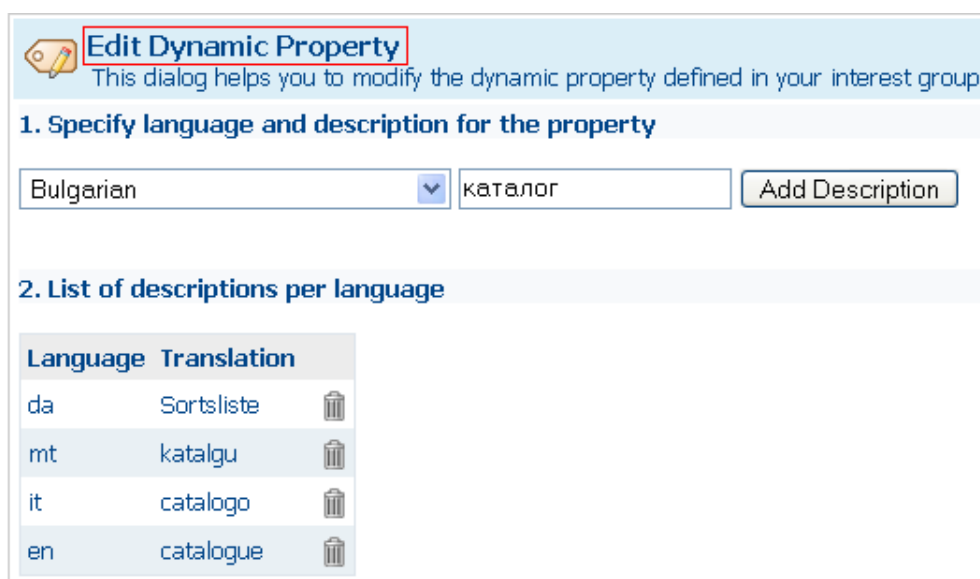
From the IG main menu:





[ADMINISTRATION](#) > [Dynamic properties](#) > icon 

From any administration page:

[Go to the interest group administration page](#) > [Dynamic properties](#) > icon 

You can take advantage of editing the property to add or remove translations.



Language	Translation	
da	Sortsliste	
mt	katalgu	
it	catalogo	
en	catalogue	

We add a new translation

Customising the navigation through your interest group

You may want to find your favourite actions, easily and quickly. Maybe, you would prefer to group all of the spaces of your Library on a same page, reach your posts in a few steps... You can customise the look and feel of services Library, Newsgroups and Information. In each case, you can modify the display of either the spaces or contents.

Adapt the Library interface to your needs




To display the Library's page as you please:

From the IG main menu:
[ADMINISTRATION](#) > [navigation preferences](#)

From any administration page:
[Go to the interest group administration page](#) > [navigation preferences](#)



- ✓ On the main page of 'navigation preferences', you will find options for changing the display of the spaces
- ✓ the contents
- ✓ the discussions relating to a content

Library Service	Contents (urls and documents)	/CircaBC	
Library Service	Discussions (topics on spaces or contents)	/CircaBC	
Library Service	Containers (spaces and dossiers)	Current Node	

The look of the spaces is customised

Display the spaces as you please

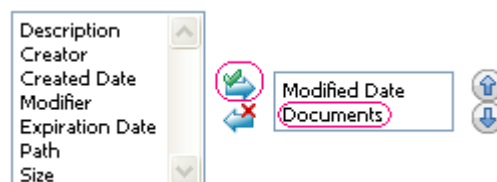
You choose 'Library service (...) Containers (spaces and dossiers)' and press the Edit icon ().

You can then [show the title of spaces](#), their name or both the title and name.

_ Does such an option make sense?

_ Just keep in mind that the name is by-default information that you cannot edit while you put the title you want and can modify it as often as you need. Displaying the titles, only, may help you organising the spaces following your own classification.

You can [display some space properties](#) on the main page of the space. Using that, you can take a look at the number of documents contained by the space, the path from the root of the Library...



Select a property and press the green-labelled arrow

The properties you select are added into the column at right-hand . You can change their order using the arrows up or down. The 'Reject' icon (✖) is for removing your selection.remove them from your selection.



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

Spaces

Title ▼	Modified Date	Documents
Consultation Labour Law	25 October 2007 11:05	6
Extonly	16 February 2010 08:31	1



We display the title, modification date and number of items per space

In a same way, you can display your favourite actions, change the number of spaces displayed per page,...



Specify actions

The action "View Details" will be displayed by default

Edit Properties
 Cut
 Take Ownership
 My Notification Status
 History
 View Discussions
 Start Discussion

Email me this dossier
 Delete
 Copy
 Manage shared space

Specify other options

Initial Sorting column: <First Column> ▼

Initial Sort descending: ☐

Row to display: 30 ▼

The links 'revert changes', 'load default values' or icon 'Reject' allow you to cancel the changes you made.

Display the contents as you please

You proceed similarly in order to display a set of properties and actions on the 'contents' pane of any parent space. You can manage the number of contents shown per page as well.

Display the discussions as you please

If you want to see, at a glance, how many replies a post received or if it was approved, you will organise the navigation preferences attached to the discussions attached to a content of the Library.

Other navigation options

The navigation inside forums or topics can be customised via 'Newsgroup service'.
The page for managing the information service can also be adapted to your preferences.

But...What is the 'Information service'?

Add, configure, remove logos

To deal with logos:

From the IG main menu:
[ADMINISTRATION > custom logo](#)

From any administration page:
[Go to the interest group administration page > custom logo](#)



How to manage logos

This is to be done in three major steps:

- ✓ you upload logos
- ✓ you configure the logo display (picture size, location...)
- ✓ you make the logo visible from the pages you want




You can make use of [different logos for the different services](#) of your interest group.

Upload a logo

You take it from your computer or from the Library of your interest group.

As soon as uploaded, the logo is stored to the 'list of available logos'. You can then make it the [by-default logo for your whole group](#).

List of available logos.

Preview	Name	Inherited from	Actions
	circabc_logo.gif	/CircaBC	 

To set the logo as by-default, press on icon 

Resize logo and put it to the right place

You customize the display of the logo for

- ✓ the homepage of the group
- ✓ the various services

Apply specific settings for Interest Groups Services

Service	Override	Display	Logo
Information	false	<input checked="" type="checkbox"/>	ig_logo.gif
Newsgroups	true	<input checked="" type="checkbox"/>	circabc_logo.gif
Library	true	<input checked="" type="checkbox"/>	circabc_logo.gif
Members	false	<input type="checkbox"/>	280px-Shinkansen_S500_1069309751024.jpg
Surveys	false	<input type="checkbox"/>	280px-Shinkansen_S500_1069309751024.jpg
Events	true	<input checked="" type="checkbox"/>	280px-Shinkansen_S500_1069309751024.jpg

'Override' is for displaying the selected logo in place of the default

Publishing your information page

What information? Whom for?

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

This service consists of two parts:

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

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

Those who play a role as **administrators of the information service** can

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

As a leader of your interest group, you have been given the role **administer**, by default.

Presenting information through the information service

In a few words

First you **create a mini website**, locally. Then you will **upload** its elements to the information service. Lastly, you **associate an index file** through which you set links to the documents to be browsed on the publishing area.

Creating an information page

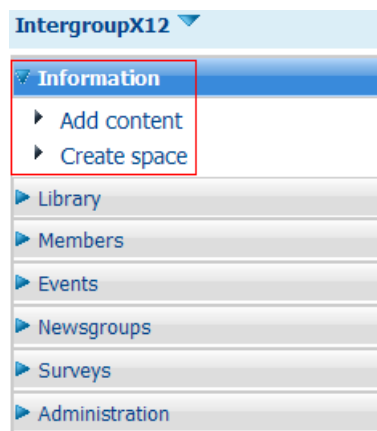
Before logging in CIRCABC, you will have designed your own web pages. Then you log in and go to your interest group.

To access to the document repository:

From the IG main menu:
INFORMATION > Browse repository



Having clicked on '**browse repository**', you can find the commands for uploading your information site:



Two commands and your information site takes shape

- ✓ You load your html file through command '**Add content**'. We add 'EU-gallery.htm', for instance.
- ✓ You **create a space** where you store the files originally placed in the files folder (this contains the documents you have inserted in your web page, such as pictures). Our folder 'EU-gallery_files' contains 5 pictures.
So we create the space titled 'EU-gallery_files' and upload the 5 images. A further release of CIRCABC will offer the opportunity to load these documents in bulk.




We upload web pages to the 'information' service

- ✓ Lastly, you **define the index page** which links together the documents you have just added.

To set the index file:

From the IG main menu:
[INFORMATION > Administration > Edit information service properties](#)

From any administration page:
[Go to Information administration page > Edit information service properties](#)



You are taken to the page titled '[Modify space properties](#)'. You put the exact name of your mini website in the field so-called 'index page'.

The screenshot shows the 'Modify Information Service Properties' form. The title 'Information' is circled in red. The form includes fields for 'Title' (set to 'Information'), 'Description' (empty), 'Name' (set to 'Information'), 'Owner' (set to 'Administrator'), 'Adapt' (checked), and 'Index page' (set to 'EU-Gallery.htm', which is circled in red). There are 'Translate' links next to the 'Title' and 'Description' fields. The instruction at the top says: 'Modify the Information Service top folder properties then click OK.'

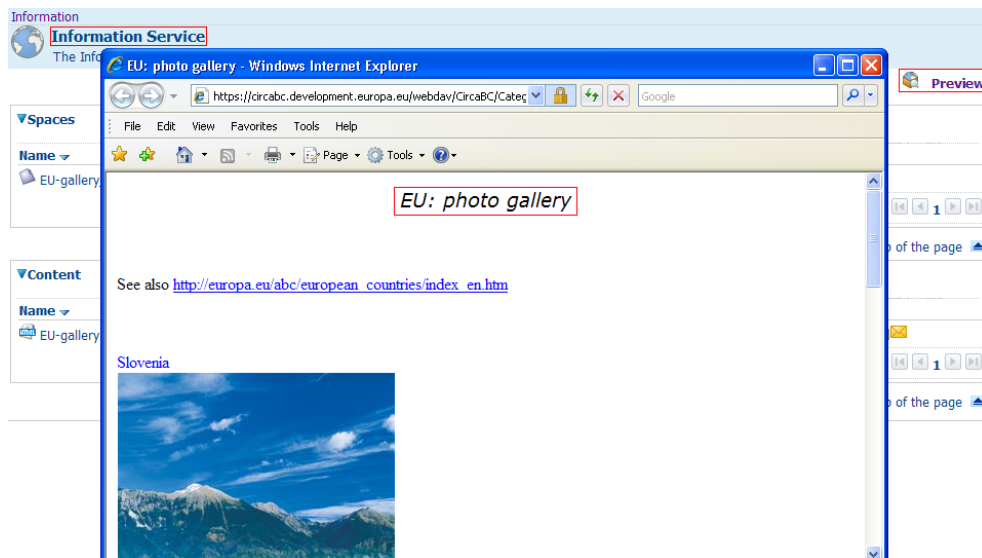
Tick 'Adapt' and the information page is displayed in the same window

You confirm the changes made and close '**Edit information properties**'.

- Well, but how to verify the lay out of my new information page?
- Through the link 'Preview' on the Information service main page



In the example below, '**Adapt**' was ticked off: the information page is opened in a new window.



Let's take a look at our new information page

Modifying an information page

The spaces in the information service look like those in the Library. You can edit even remove them in a same way.

The contents have properties similar to contents in the Library. You can perform similar actions on them.

About Events

General information about the events as well as how to check appointments can be found in the *CIRCABC user guide*.

The Leader guide will just explain what you can do as an administrator of the service 'Events'.

The role you play in events

The following roles have been defined for the service 'Events':

- ✓ Administer
- ✓ Access
- ✓ No access

- ✓ As IG Leader, you play by default the role 'Administer'. This means that you can [create, modify or delete appointments](#). Therefore you can access a menu the other users fail to see:



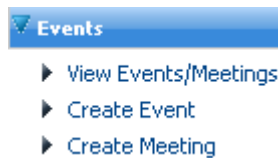
All what you need to administer events

Manage events

Create an event or a meeting

To schedule an event:

From the IG main menu:
[EVENTS > Create event / Create meeting](#)



Following the link 'create Event' takes you to a three-stepped creation wizard. You will successively

- ✓ [Enter general information](#)
- ✓ [Define an audience](#)
- ✓ [Provide details about the organiser](#)

Step one - Enter general information

You give a name and description, the degree of priority, the place where the event will occur...

Event Properties	
* Language:	English
* Title:	Fish & chips
Abstract:	Fishermen and cooks meet for lunch and discussion about the future of fishery.
* Type:	Appointment
* Priority:	High
* Date:	01 April 2009 Today
* Occurs:	<input checked="" type="radio"/> Only Once <input type="radio"/> Daily for times <input type="radio"/> Every Days for times
* Start Time:	11 : 30
* End Time:	21 : 00
* Standard Time Zone:	GMT+1
Location:	on board
Invitation Message:	Feel free to come and participate in the debate and samplings.

The title and abstract are not multilingual

During step one, you set up the occurrence rate of the appointment. On the illustration above, we prepared a single event: the option 'Only once' is checked in the field 'Occurs'. You set up a series of events, by combining a periodicity and a number of occurrences. In the example below, we scheduled a weekly appointment which was repeated at three times:



Various periodicities are possible

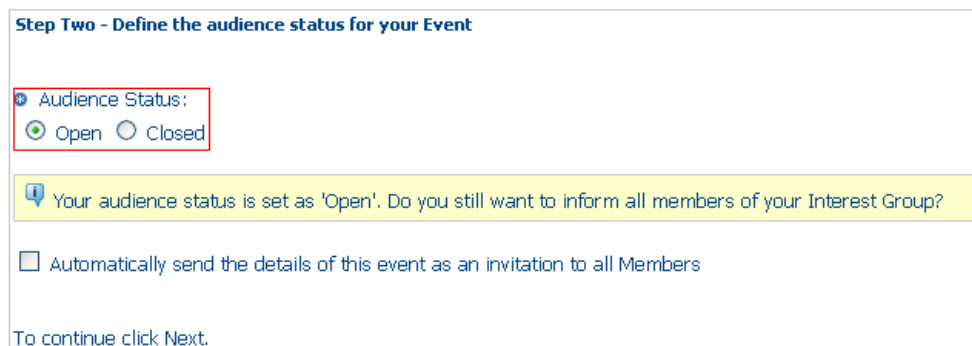
Step two - Define an audience

The event will be 'open' or 'closed'.

Open events are limited to the membership of your interest group.

Closed events can bring together:

- ✓ members of your interest group
- ✓ members of any other interest group on CIRCABC
- ✓ registered users (users who are logged into CIRCABC) being not invited in any interest group
- ✓ anonymous users (users without username or having not logged in)



Every member of the interest group may attend this event

In the case of a closed event, you are proposed to list your invitees:

Audience Status:
☐ Open ☒ Closed

The audience status has been set to 'Closed'. Please, specify the participants.

Part A: Write the emails of the external users (separated by 'Enter')

HBerlitz@yahoo.fr
Jphil.Rameau@barocco.fr

Part B: Select internal users

All Users Search

Results for 'lerouge' in 'All Users '. [Clear Results](#)

Erick LEROUGE (AstroCloA@gmail.com)

Add to List

Name
Amadeus WEBER
Aida VERDI

You can invite people from outside and inside CIRCABC

Step three - Provide details about the organiser

Now you check the information about the organiser. You are free to modify it as you please.
By default, you are the organiser of the event.

Step Three - Contact Information

* Name:

* Phone:

* Email:

URL:

To continue click Finish.

You can indicate an organiser different from yourself

Create a meeting

The difference between an event and a meeting is that, in the case of a meeting, users can accept or reject the invitation to attend.

Creating a meeting follows the steps described above plus another. This additional one gives you an opportunity to set a relation between the meeting you are scheduling and a space in the Library of your interest group.

As setting up the meeting properties, you can select a subspace of the Library:

Step Two - Relevant Space in the Library

You can optionally define a relevant space of the Library for this Meeting.

 Go up

☒  Landscapes

To continue click Next.

You could as well not to select any space

Later, the related space will be quoted on the details page of the meeting:

▼ Relevant Space

Relevant Space for the Meeting: Library/Landscapes/

Modify events

To edit an event or meeting

From the IG main menu:

EVENTS > View Events/meeting > icon  > actions 'Modify ...'



Change general information

You can modify almost every data. Keep in mind, however, that, presently, you cannot change the dates of a repeated appointment. Neither can the standard time zone.

Modify contact information

This allows you give a different e-mail, phone, etc for contact. The changes you introduce there are specific for the appointment you are scheduling. The CIRCABC user account of the contact is not affected.

Modify audience

You can swap an open audience for a closed one, and reversely.

Delete events

To cancel an event or meeting:

From the IG main menu:

EVENTS > View Events/meeting > icon  > action 'Delete'



- But what did you provide about repeated events? Should I delete the whole appointment?
- You are given the choice of removing either single occurrences or the series, as shown below.


We have scheduled a meeting which should be repeated daily between the 1st and 3rd May 2009.

M a y 2 0 0 9 >>				
day	Thursday	Friday	Saturday	Sunday
	30	1 May	2	3
		- 14:00 M	- 14:00 M	- 14:00 M

This meeting is expected to occur at three times

For any reason, we have to cancel the appointment of Saturday May, 2nd. We display the calendar and click the link '- 14:00 M' on the cell labelled '2'. Doing that comes up with the details of the meeting. We click 'delete' on the actions list. We are asked for what to delete.

Events

 **Delete Meeting**
To remove "Evolution of the language of IT" from the calendar, click "Finish".

You are about to delete a recurrent meeting. Do you want to delete all the occurrences of the recurrent meeting or just this one?

☒ Delete this occurrence.

☐ Delete only the future occurrences.

☐ Delete the series.

Presently, you can delete either one occurrence or the full series

We check the radio button besides 'Delete this occurrence' and confirm the operation.

M a y 2 0 0 9 >>				
day	Thursday	Friday	Saturday	Sunday
	30	1 May	2	3
		- 14:00 M		- 14:00 M

Once done, the only appointment of May, 2nd has been removed from the calendar

If you ever cancel the first appointment, the details of the meeting will be refreshed with the date of next occurrence. The field 'start date', however, will not.

About the general and advanced search

Which kind of search?

The search engine explores the metadata and contents.

The general search

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

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*).

Need further support?

European Commission's staff:

Support available via your local helpdesk (e-mail requesting to open a call for DIGIT CIRCABC SUPPORT, with copy to DIGIT CIRCABC SUPPORT).

Users outside the European Commission

Support available via EC-CENTRAL-HELPDESK@ec.europa.eu (e-mail with copy to DIGIT CIRCABC SUPPORT, requesting to open a call for DIGIT CIRCABC SUPPORT).

Please include the following information:

Name
E-Mail
Organisation
Telephone number
Description

