



# OSS

## CIRCABC 3.6 - LEADER GUIDE



08 August 2014

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## About the CIRCABC Leader Guide

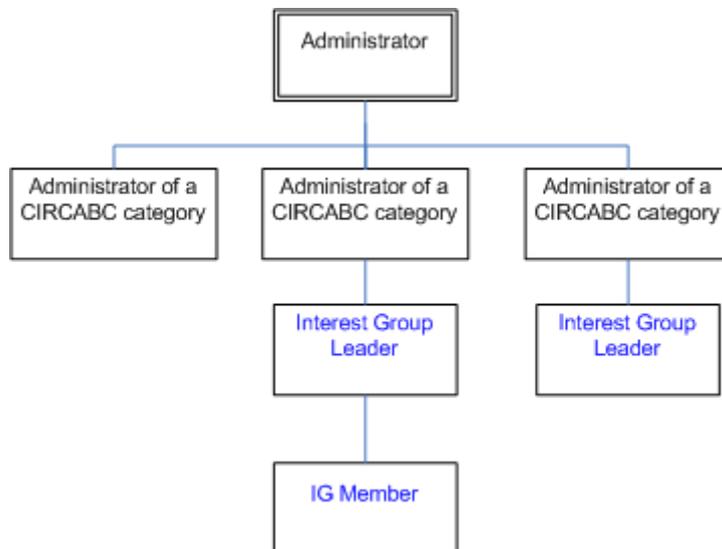
### Objective

This guide explains the actions Interest Group Leaders (IG Leaders) may perform in order to successfully manage the users, the services and the contents for their Interest Groups.

### Audience

*This Guide is intended for:*

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



**CIRCABC responsibilities tree**

IG Leader access profile or administrative rights can be granted by:

- ✓ An Administrator of your CIRCABC Category;
- ✓ Another Leader of the Interest Group.

### Structure

This guide complements the OSS CIRCABC User Guide and focuses on features specific to Interest Group Leaders.

*First-time leaders and users are warmly advised to consult the **OSS CIRCABC User Guide** at <https://circabc.europa.eu/w/browse/5b627009-61e7-4d9e-8c8a-689a33ac8955> first. The OSS CIRCABC User Guide will help you to better understand users' needs by describing what the members of an Interest Group can do.*

## First-time Leader

The administrator of a CIRCABC Category and Interest Group Leaders can assign the 'Leader' profile to members of the group.

## Responsibilities of Interest Group Leaders

The responsibilities of Interest Group Leaders include:

- Presenting the Interest Group via the Information Service
- Managing visibility and permissions
- Managing users and profiles
- Processing requests for membership
- Managing services
  - Library – spaces and contents
  - Newsgroups - forums and moderation
  - Events and meetings
- Setting IG default Notification status
- Assisting members with issues

## Creating a new Interest Group

An Interest Group (IG) belongs to a CIRCABC Category (a set of IGs).

An Interest Group is a *private workspace* shared by a *community* of users and is characterized by a **group of users** (potentially unlimited), a set of **services** (Library, Members, Events, Newsgroups, etc.) and a series of **contents**.

Interest Groups are created by Category Administrators after receipt of the following information:

- Name of the group: A short name that appears in the navigation bar to and within the group. It should be as short as possible (acronym, for instance). ex.: InfoHub
- Title of the group: long name of the group which is displayed on the Category's page. Ex.: "CIRCABC – Information Hub"
- At least one Leader: this Leader may invite other Leaders after the group has been created.
- Optionally: Light description (visible on the Category page) and description (Visible in the IG page)

## Brief overview of Services

**Information:** The place where leaders can host their website which can be visible to invited users only or to everyone.

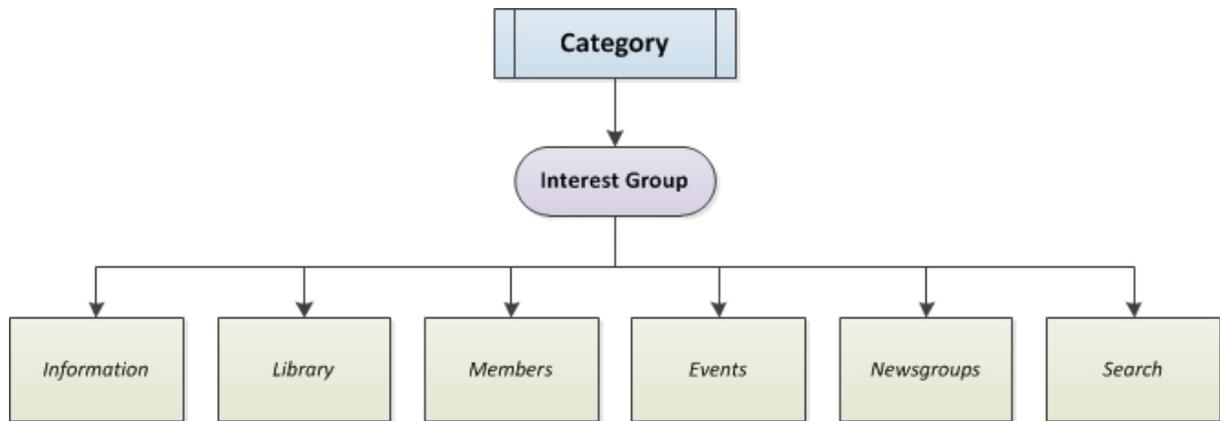
**Library:** the place where documents are stored

**Members:** lists the members of the Interest Group

**Events:** for scheduling and notifying events and meetings

**Newsgroups:** participate in or create discussions through potentially moderated forums.

**Administration:** management tools for the Interest Group and each individual service



Overview of the IG Services



Services can be reached from the Interest Group main menu

## Interest Group Access and Visibility

Leaders decide whether an Interest Group (or a part of it) is made public or reserved for membership.

**When Interest Groups are created they are only visible to and accessible by their members.** Leaders can change this default status in the 'Administration' service:

- ✓ **Log in** to CIRCABC and enter the Interest Group
- ✓ From the **Main page** of your Interest Group, Click **Administration > Access profiles**
- ✓ Change setting to '**Enabled**'

### Public/Registered Access Control

Public access to the Interest Group 'Infohub' is currently:

**Enabled**

Registered access to the Interest Group 'Infohub' is currently:

**Enabled**

**'Public'** access means that anonymous users (those not logged in) will see the title and description of the Interest Group **They will not see the content.**

**'Registered'** access means that users logged into CIRCABC will see the title and description of your Interest Group. **They will not see the content but they can apply for membership.**

*Potential members will not be able to see the Interest Group until it has been made visible to 'Registered users' or 'Public'. Consequently, they will not be able to apply for membership and will need to be invited by a Leader.*

## User Management

Obtaining a **username** and **password** is a prerequisite to becoming a member of an Interest Group. Information on how to register to CIRCABC can be found in the OSS User guide. After the CIRCABC account is created, Leaders can invite the user to join their Interest Group and the user can request to join Interest Groups.

Interest Group Leaders assign an access profile to each member of the group.

## Access Profiles and Roles

### *About access profiles*

Each **access profile** consists of a set of **rights** (permitted actions) on each of the various **services**.

A CIRCABC user may have memberships in several Interest Groups. **Users will have a separate and unrelated access profile for each Interest Group.**

Here are some examples of standard profiles:

<p><b>Leader:</b> Administer all services of the Interest Group.</p> <p><b>Author:</b> Create, edit and delete contents (but may not delete the contents uploaded by other members); read and post news; view the membership list.</p> <p><b>Secretary:</b> Administer the service 'Members'; not authorised to view the Library.</p> <p><b>Access:</b> Read and download from the Library; read posts on the Newsgroups; view the membership list.</p>
---

Besides the standard profiles above, there are two additional ones:

<p><b>Registered:</b> Users who have registered and can apply for membership. An Interest Group Leader can allow access to the contents.</p> <p><b>Public:</b> The public users ('guests') have no username and cannot apply for membership. An Interest Group Leader, however, can set limited rights for public users.</p>
--

Other custom profiles can be added as necessary.

### *About roles*

Roles are the smallest components of access profiles. They are simple permissions. **Each access profile includes one role per service.**

The table below lists the roles for the **Library**:

**No-access:** Cannot view contents  
**Access:** Read only; Download contents and their properties  
**Edit only:** Edit any content item; cannot create or delete any contents  
**Manage own:** Create, edit and delete own contents; Read the documents created and managed by other members.  
**Full Edit:** Create, edit and delete own contents; Edit any content of other authors.  
**Administer:** Manage the Library

	Read / Download	Upload Contents	Edit / delete own contents	Edit any contents	Delete any contents	Manage Library
No Access	Red	Red	Red	Red	Red	Red
Access	Green	Red	Red	Red	Red	Red
Edit only	Green	Red	Green	Red	Red	Red
Manage own	Green	Green	Green	Red	Red	Red
Full Edit	Green	Green	Green	Green	Red	Red
Administer	Green	Green	Green	Green	Green	Green

## 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 > Access profiles](#)



Choose [Create access profile](#).

**Create Access Profile** Enter an access profile title and click [Add to list](#). Then specify the role for each service:

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

**1. Specify profile titles**

English

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

## Multilingual profiles

CIRCABC has been designed to allow users to work in their preferred European Union official language. Please refer to the 'Manage multilingual editions' section of the *OSS OSS CIRCABC User Guide* for more details.

To [add a multilingual profile](#), enter the profile name, select the language from the left-hand list then click 'Add to list'. Repeat this step for each new linguistic version. Once the profile name has been entered in all of the preferred languages, complete this step and confirm the 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 [dropdown] [input field] [Add to List]

Language	Name	
de	Profile	[trash icon]
en	Profile2	[trash icon]
fr	Profil2	[trash icon]

**2. Specify profile permissions**

Service	Permission
Information	Administer [dropdown]
Library	Manage Own [dropdown]
Directory	Access [dropdown]
Events	No Access [dropdown]
Newsgroups	No Access [dropdown]

*As the profile is visible only for leaders it's not necessary to add a multilingual profile. Only the English version will then be visible.*

## Modify an access profile

Interest Group administrators may:

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

From the IG main menu:

[ADMINISTRATION > Access profiles](#)

From any other administration page:

[Go to Interest Group Administration Page > Access profiles](#)



### Change profile roles

Click 'Access profiles' to open the page with a table where the profile roles (including those of IG leader) can be edited.

The roles (permission levels) can be edited for each service by clicking the [edit icon](#) .

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

Note: For the Library the profiles 'Guest' can only be set to either 'Access' (able to see content) or 'No Access' (not able to see content). The profiles 'Registered' can get 'Access and Post'

<b>Registered</b>	Access	Access	No Access	No Access	No Access	
<b>Guest</b>	No Access					

'Access profile' is also the page where [Interest Group visibility](#) can be set for Registered and 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 profile titles

Click 'Access profiles' to view the list of the profiles in the interface language.

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

In the area called 'specify profiles titles' 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 ▼

Language	Name	Action
en	Secretary	

 Press this button

### Delete an access profile

Profiles which have not been allocated to any user can be deleted.

In the example below, the profile called 'Profil1' has not been assigned to anyone while at least one member has been granted the 'Access' profile.  
As a result 'Profil1' can be deleted (denoted by the trash can action icon) whereas 'Access' cannot.

The profile called 'All\_CIRCA\_Users' cannot be deleted or shared.

<b>ALL_CIRCA_USERS</b>	Access	Access	No Access	No Access	No Access	
<b>Access</b>	Access	Access	Access	Access	Access	
<b>Profil1</b>	Manage Own	Administer	Manage Members	Access	No Access	

Can any profile be deleted?

- The profiles 'Registered' or 'Public' cannot be deleted (the 'delete' icon is not visible for these).

- Groups must contain at least one administrator. Leaders must ensure that a different profile offers administer rights for the 'Members' and 'Library' services before the last IG Leader can be deleted.

## Inviting users

Any member assigned with either the '**Manage Members**' or '**Administer**' role for the Directory service 'Members' can invite users and applicants to join the Interest Group. Administrators can create, modify or delete 'Access profiles'.

**A user may have memberships in several different Interest Groups.**

Users can be invited in three ways:

- ✓ An authenticated user contacts the IG Leaders through the 'Apply for Membership' procedure (see 'Apply for Membership' in the 'Participate in an Interest Group' section of the *OSS CIRCABC User Guide*)
- ✓ Leaders invite a user on their own initiative
- ✓ Sharing a group of users with **other Interest Groups of the same Category**.

## **Invite Membership applicants**

A would-be member has followed the link 'Join this Group' from the list of available Interest Groups on the Category home page. The user has completed and submitted the application form.

For further information, refer to the 'Participate in an Interest Group' section of the *OSS CIRCABC User Guide*.

Leaders and administrators of the 'Members' service can view and accept or reject the pending applications:

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

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



The page 'Application for Membership' displays the list of applicants to be accepted or rejected. This can be done individually or for all at once.

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

**Leaders can opt to accept or refuse membership requests**

### **Invite a user who has not applied for membership**

Anyone who has a username can be invited to join an Interest Group. Potential members without an account will need to create one in order to be invited. Information on how to obtain a username and password can be found from the OSS user guide on the [CIRCABC Information Hub](#).

Leaders can invite users:

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

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



Follow the steps in the 'Invite CIRCABC user' dialog:

- ✓ Select the user to invite
- ✓ Select an access profile
- ✓ Verify that the right profile has been given to the right user
- ✓ Optionally, notify the selected user that he/she is now a member of your group.

### 1. Select the user 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.

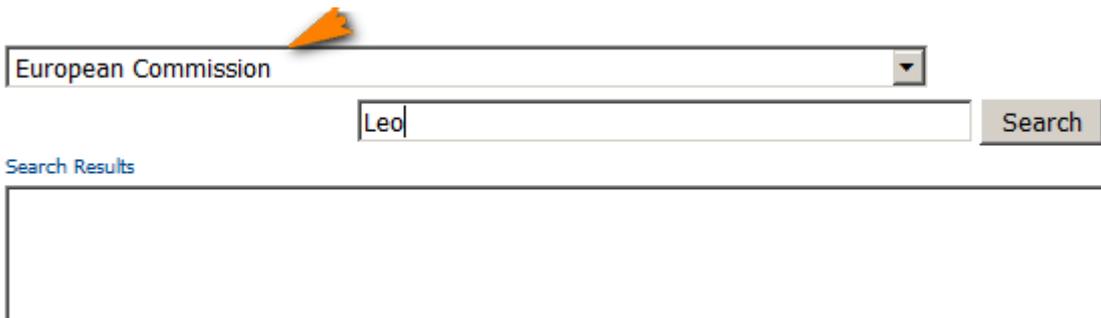
The same user cannot be invited twice (already invited users will appear in the list with the comment 'Already Invited').

*What if the user I want to invite has more than one account?*

*- Search the user by domain*

*- Check with the user on the preferred account*

*Note: It is strongly recommended that users with internally provisioned accounts (European Commission, European Parliament, etc.) use these over externally provisioned accounts.*

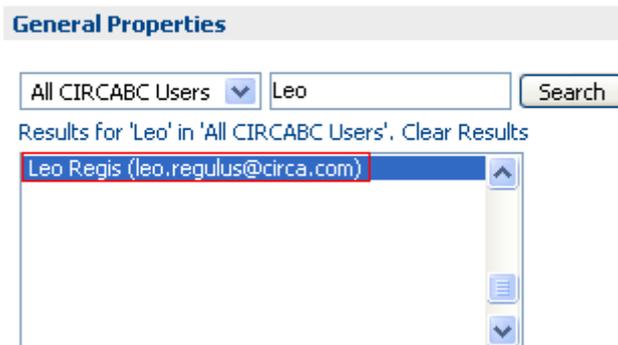


**Searching only in the European Commission domain**

Press **Search** to display the results in the selection box, and select the user to invite:

#### Step One - Select invited users and profiles

Select new users and associated profiles



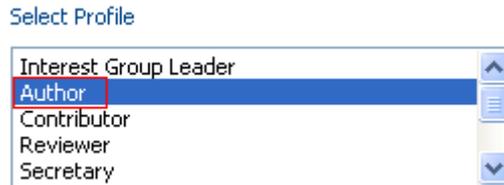
**Users to invite**

Search for a user by:

- ✓ First name
- ✓ Last name
- ✓ Username
- ✓ Email address (must include the '@' character).

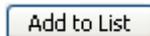
## 2. Select the access profile to be assigned

Select an access profile from the scroll down list then click [Add to list](#).



Which access profile?

Once both a user and an access profile have been selected, click [Add to List](#):



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

The page is refreshed to display the user identification and access profile in the **name** field at the bottom of the page:



Select new Member

If the information is not correct, click the trash can icon at the end of the 'name (access profile)' line to remove the selection.

When satisfied that the information is correct, click [Next](#).

*Can I select more than one user at a time?*

*- Yes, you can invite several new users at the same time. Repeat search user, 'Select Profile' and 'Add to List' as many times as necessary, then click 'Next'.*

#### 4. Optionally choose to **Notify new invited users** that they are now members of the IG.

##### 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

##### Choose whether to notify users

By default, the user will be notified, this can be changed by selecting No under 'Do you want to send an email to notify the invited users?'. The message text can be modified.

#### Bulk user invitation

Interest Group Leaders can invite multiple users (all with existing CIRCABC accounts) in 'Bulk' by:

- ✓ Inviting users from another Interest Group
- ✓ Inviting a list of users

From the IG main menu:  
[Administration > Bulk user invitation](#)

From any Administration page:  
[Go to Information administration page > Bulk user invitation](#)

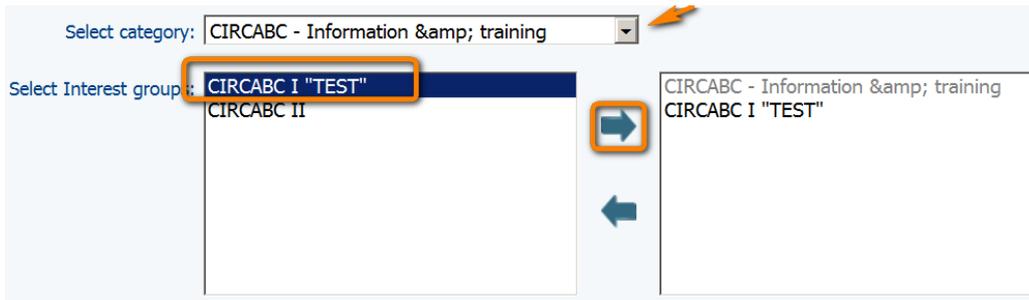
#### Import from another Interest Group

If a Leader has already invited a large number of members to an existing Interest Group and would like to invite the same users to a newly created group, it is possible to import these users.

The IG Leader of the new group with the permission 'Directory Access' to the IG from which the users will be invited is sufficient to be able to import the users.

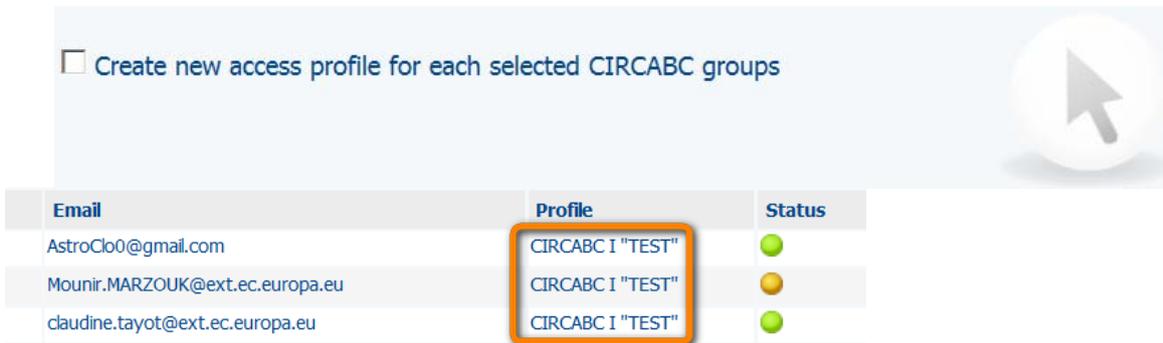
1. From the new Interest Group and select the Interest Group with the members that are to be invited

- ✓ **Select Category**
- ✓ **Select Interest Group** with the members to be invited
- ✓ Use the arrow to add the IG to the right hand box
- ✓ Click **Next**



Click the arrow to add or remove groups

2. Optionally choose "Create new access profile for each of the selected CIRCABC groups"

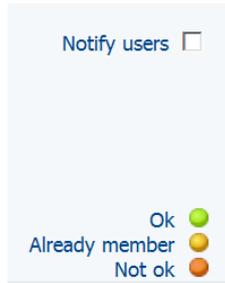


New profile has name of the selected IG

Allocate a profile to the new users:

- ✓ Select users
- ✓ Choose a profile
- ✓ Click **Update**





Newly invited users can be notified automatically. Status of each user is displayed

3. Click Finish to invite the users

### Bulk invite members

1. Download the empty template



	A	B	C	D	E
1	username	firstname	lastname	email	profile
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					

Empty template to be completed

2. Complete the Excel file

	A	B	C	D	E
1	username	firstname	lastname	email	profile
2	beaurpi	Pierre	Beauregard	Pierre.BEAUREGARD@ext.ec.europa.eu	Access
3	intyrja	Janet	MC INTYRE		Leader
4	zscheel		ZSCHERPEL	Elisabeth.ZSCHERPEL@ext.ec.europa.eu	Leader
5	MounirTest			marzouk.mounir@gmail.com	Leader
6	tayotcl				Coordinator
7	marzomr			Mounir.MARZOUK@ext.ec.europa.eu	
8	Smith.ben	Ben	Smith		Leader

Completed template to be uploaded

**Mandatory:**  
It is compulsory to complete one of the two fields:  
**Username or email**

username	firstname	lastname	email	profile
----------	-----------	----------	-------	---------

**Optionally:**  
You may complete both:  
**Username and email**  
First name, Last name are optional  
Profile is optional (Can be assigned later)  
If the profile does not exist CIRCABC will create a new one

3. Upload the completed template



4. Verify list of users

Users to be invited

select/unselect all users

Ig	Group	File	Username	Email	Profile	Status	Actions
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	beauipi	Pierre.BEAUREGARD@ext.ec.europa.eu	Access	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	intyrja	Janet.MC-INTYRE@ext.ec.europa.eu	Leader	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	zscheel	Elsabeth.ZSCHERPEL@ext.ec.europa.eu	Leader	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	MounirTest	marzouk.mounir@gmail.com	Leader	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	tayotcl	Claudine.TAYOT@ext.ec.europa.eu	Coordinator	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	marzomr	Mounir.MARZOUK@ext.ec.europa.eu	Mounir.MARZOUK@ext.ec.europa.eu	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	Smith.ben		Leader	<span style="color: orange;">●</span>	

Legend: ● Ok, ● Already member, ● Not ok

**Ben Smith will be ignored: Probably the CIRCABC account does not exist  
This user can be deleted**

5. Assign missing profile(s)

**Bulk operations**

Change access profile: Author Update selected users Notify users

Remove selected users

**Users to be invited**

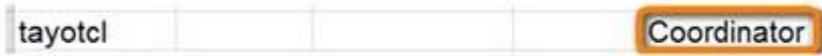
select/unselect all users

Ig	Group	File	Username	Email	Profile	Status	Actions
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	beauipi	Pierre.BEAUREGARD@ext.ec.europa.eu	Access	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	intyrja	Janet.MC-INTYRE@ext.ec.europa.eu	Leader	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	zscheel	Elsabeth.ZSCHERPEL@ext.ec.europa.eu	Leader	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	MounirTest	marzouk.mounir@gmail.com	Leader	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	tayotcl	Claudine.TAYOT@ext.ec.europa.eu	Coordinator	<span style="color: green;">●</span>	
<input checked="" type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	marzomr	Mounir.MARZOUK@ext.ec.europa.eu	<span style="border: 1px solid orange; padding: 2px;">Mounir.MARZOUK@ext.ec.europa.eu</span>	<span style="color: green;">●</span>	
<input type="checkbox"/>		C:\Users\marzomr\Desktop\_Temp\New members.xls	Smith.ben		Leader	<span style="color: orange;">●</span>	

To notify new members, select 'Notify users'



If the profile does not already exist, CIRCABC will create the new one



6. Click Finish to invite the members to the new IG

### Share a group of users

A different way to add members to a group is to share a group of users with **another Interest Group of the same Category**. This is done through the [export/import access profiles](#) functionality (access profile refers to a group of users with the same access rights).

### Export a profile (from an Interest Group 'IG1')

The administrators of the Members service (those with 'Administer' as access right on this service) may export a profile. In other words, they make a group of members with the same access profile in their own group ready to be included in different Interest Groups under the same Category.

To export a profile:

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

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

Select the 'Export this profile' icon. The profile is now marked with icon  which means that

- ✓ It is available for the other groups of the Category
- ✓ The status can be reverted to 'not exported'

An application message confirms that the profile has been successfully exported.

The export can be done for as many profiles as needed.

## Import a profile (from another Interest Group 'IG2')

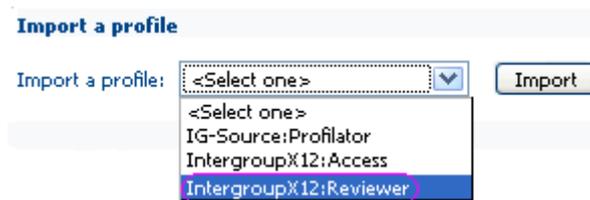
The administrators of the Members service (those with 'administer' rights on this service) may import any profiles to their Interest Group.

To import a profile:

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

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

Select an item from the list of profiles available for importing. Confirm by clicking 'Import'.



The profile is listed below the 'Manage access profiles' screen. The name of the source Interest Group and Profile is displayed.

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' remains available in the Interest Group 'intergroupX12'**

Then set the rights to be allocated to this new group of users. This does not affect the source profile.

To undo the import, click the icon  .

*An Interest Group should not be deleted as long as any of its profiles are imported by other groups.*

## Remove members

Removing a member from one Interest Group does not affect the user's memberships in other Interest Groups. Leaders cannot delete users from the CIRCABC user list.

Any type of member can be removed except for the last administrator in an Interest Group.  
**All Interest Groups must have at least one administrator.**

To remove membership:

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

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



The Administration Membership page displays the list of members of the Interest Group.  
Click the **Remove** icon () next to the member to be removed.

**Profile filter**

Filter on a specific Profile:  Search for:  Results per page:

**Change Profiles**

Assign new profile to filtered users:

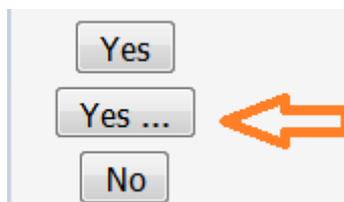
**Users and Profiles**

Surname	First Name	Email	Profile	Actions
 COLUMBRO	Gabriele	columbro@gmail.com	IGLeader	 
 DELALANDE	Romain	romain.delalande@alfresco.com	IGLeader	 
 FASSIAN	Margot	Margot.Fassian@ec.europa.eu	IGLeader	 
 MARZOUK	Mounir	Mounir.MARZOUK@ext.ec.europa.eu	IGLeader	 
 MC INTYRE	Janet	Janet.MC-INTYRE@ext.ec.europa.eu	IGLeader	 
 ORIGAS	Benoit	Benoit.ORIGAS@ec.europa.eu	IGLeader	 
 TAYOT	Claudine	Claudine.TAYOT@ext.ec.europa.eu	IGLeader	 
 ZSCHERPEL	Elisabeth	Elisabeth.ZSCHERPEL@ext.ec.europa.eu	IGLeader	 

**From this view, Leaders can remove or change access profiles**

Confirm the choice or cancel the action.

As this action can take some time, it is possible to run it in the background by clicking the **Yes ...** button.



*"Filter on a specific Profile" and "Search for" can be used to easily find the member that is to be removed*

## Change a member's access profile

The access profiles are not definitively assigned. The access profile of any member can be changed at any time.

Note: An **Interest Group must have at least one Administrator**

Those who are provided the **Manage Members** role in the 'Members' service may modify the access profile of any Interest Group member other than:

- ✓ A unique Interest Group Leader
- ✓ Their own membership

To modify membership:

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

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



The Interest Group members list is displayed. Modify the access profile for a user by clicking the **change** icon () next to that user's name and profile.

You can also use the "Assign new profile to filtered users" if you need to change the profile of several members at the same time:

**Change Profiles**

Assign new profile to filtered users:

*The user access profile is modified only for the current Interest Group.*

## Assist members with lost credentials

Lost, forgotten or mandatory resets of passwords are some of the most frequent issues users may be faced with. Fortunately, this can be easily solved through an automatic procedure.

### **Self-reset password**

Users who have lost their password follow the link 'Lost your password?' from the 'Login' page. **No action is required on the part of the IG Leader for this.** The action has to be done by the user.

### Log in CIRCABC

You must be authenticated to access all the features of CIRCABC.

Key in your User name and password such as provided by the CIRCABC administrator

User Name :

Password :

Did you [forget your password ?](#) Just fill in the appropriate form. Your password will be e-mailed back to you.

## Members Service

The Members service allows authorised users (**Access** or higher level role on this service) to search for members, to view and download the list of Interest Group members.



The main menu as seen by a user with rights to access all the IG services

## Search for users

User searches can be filtered by:

- ✓ Only members of the Interest Group
- ✓ Any CIRCABC user
- ✓ By user domain ('European Commission', 'External', 'All users'...)
- ✓ By 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**

*Can I list all the members of my Interest Group at one time?*  
*- Yes, if the Interest Group contains 1000 or less members.*  
*- The 'Members' search function is unable to display more than 1000 members at a time (even if 'all CIRCABC users', 'all domains' and 'all profiles' was requested). Once the limit has been reached, a specific warning message is displayed.*

## Library Service

Leaders, by default, **administer the Library**. This permission may be assigned to and shared with other members of the Interest Group. **Any member assigned with the 'Administer' role for the Library is able to manage the Library Service.**

### About the Library

The Library is where contents (documents, links, etc.) are stored, managed and shared.

Library administrators are able to:

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

Further explanation about the Library Service can be found in the 'About Library' section of the *OSS CIRCABC User Guide*.

### Organising the Library

The Library can be organised as a tree of folders (called Spaces), and contents.

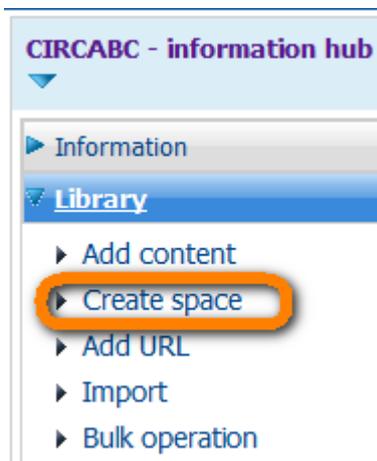
#### *Creating Spaces in the Library*

##### **Who can create Spaces?**

Users who have the right to add content are also able to create Spaces in the Library. The '**Administer**', '**Full-edit**' and '**Manage-own**' roles are all able to create Spaces in the Library.

##### **How to create a Space and sub-Space**

Browse to the **Library** or to the **Space** where a new space or sub-space is to be created, Click **Create space**



- ✓ **Name** the space
- ✓ Click **Create space** to confirm

**Space Properties**

\* Title:

Description:

\* Space type:  Space  
 Dossier  
 Share Space Link

*What is the difference between a 'Space' and a 'Dossier'?*  
- A **Space** can contain documents (text, picture, sound, web page, etc.)  
- A **Dossier** can only contain links (to spaces or contents)

Further explanation can be found in the 'Create spaces and add content' section of the *OSS 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 also delete them. It is also possible to recover a space that was deleted in error.

#### **Deleting a Library sub-space**

Further explanation can be found in 'Delete contents or spaces' in the *OSS CIRCABC User Guide*.

*A space was deleted by mistake. Is it definitively lost?*  
- It can be recovered by Library administrators through **Administer > Manage deleted items** until it is definitively deleted

#### **Recovering deleted Spaces and Contents**

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](#)



#### **Restrictions for recovering Spaces**

Only Library administrators can recover deleted Spaces.

## How to retrieve deleted contents

On the [Manage Deleted Items](#) page, search for the deleted item using various criteria.

Use the Search to find deleted items by name or content and use the filters to reduce the list.

When: All Today **Last 7 days** Last 30 days

Name	Original Location	Date Deleted	Actions
Viaglare	/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**: search with any part of the name.
  - Search by content**: search using 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').
- ✓ Search over a **time span** (the current day, one week or one month)
- ✓ **Show all** displays all deleted items

The search results display the name, location and deletion date for each item

## How to recover deleted Spaces

- ✓ Recover listed items  
If a search returns several relevant results, they can be recovered at the same time by clicking the **Recover listed items** icon () at the top of the results list.  
To definitely **delete** all of these spaces, click the **Delete listed items** icon ().
- ✓ Recover a specific item

*In this example we search for the spaces and contents that were deleted using specific date criteria. The space to be recovered is named 'Whynot'.*

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

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	
forestn2k_it.pdf	/Company Home/LookandTry	22 Май 2007 14:45	
whynot	/Company Home/LookandTry	22 Май 2007 09:25	

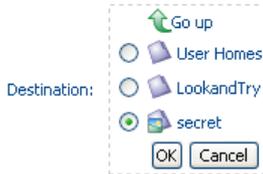
Space 'whynot' is ready to be recovered

*Choose the location where to restore the space*

*This can be either the original location or a different 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.



**Space 'whynot' will be recovered under space 'secret'**

*To recover the space to a different location, 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 results list**

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

## **Sharing Spaces of the Library**

### **What does sharing spaces mean?**

One or more spaces of the Library can be shared with one or more other **Interest Groups under the same Category**.

The top-level structure of the Library cannot be shared.

### **Who can manage space sharing?**

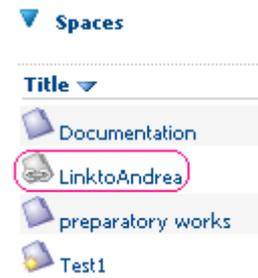
- ✓ Users with role '**Administer**' over the Library of the **host** Interest Group (Referred to as IG 1) can invite different Interest Groups to link to spaces of their Library.
- ✓ Users with role '**Administer**' over the Library of the **guest** Interest Group (Referred to as IG 2) can set links to spaces on the Library of different Interest Groups.

### **Who can access shared spaces?**

A shared space can be only accessed by:

- ✓ Members of its own (host) Interest Group
- ✓ Members of the invited (guest) Interest Group(s)
- ✓ 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.*



## **Actions on Shared Spaces**

Library administrators can:

- ✓ Check whether a space is shared or not
- ✓ Open a space of the Library to the members of different Interest Groups of the same Category
- ✓ Modify the access permissions assigned to shared spaces
- ✓ Remove an invited Interest Group from the space sharing
- ✓ Link a space of the Library to a space hosted by a different Interest Group

The other users can:

- ✓ Access the shared space to the level of access rights granted by the Leader of the host Interest Group.

## **Invite an Interest Group to share a space**

Sharing Library Spaces with other Interest Groups in the same Category is done in two steps:

**Step 1:** IG 1 Leaders or Authors invite IG 2 to share an existing space

From IG 1 **View details** icon for the Space to be shared:

- ✓ Click Manage shared space (right box)
- ✓ On top right of the page: Invite IG to share this space
- ✓ Select an Interest Group: Select an IG from your Category (this will be IG2)
- ✓ Select the Maximum permission to grant to IG 2 members
- ✓ Click on Next and Finish

**Maximum permission means that if IG 2 members have more rights to the Library they will have only the selected permission to the shared space,**



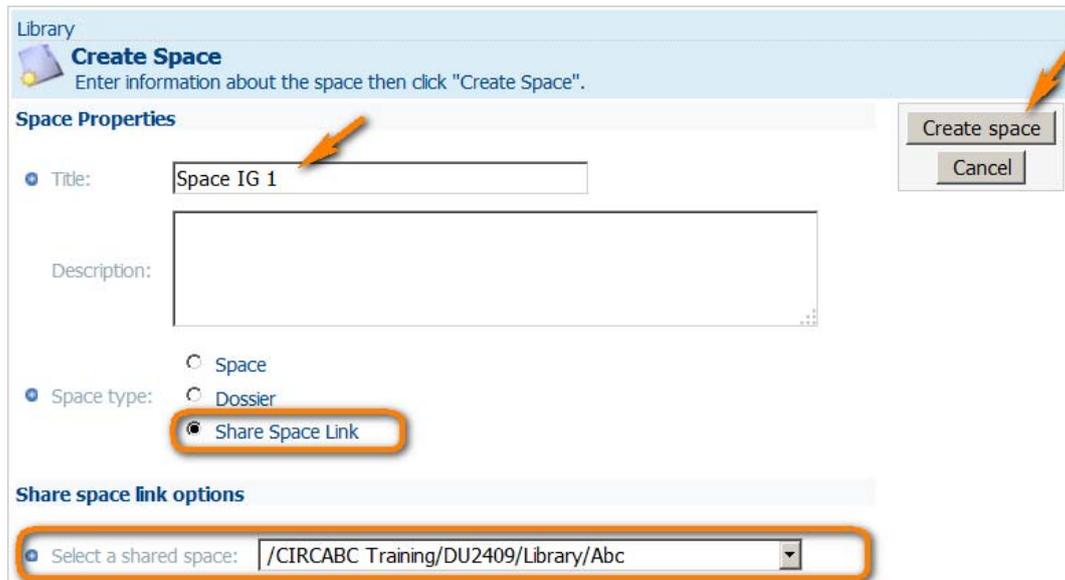
- ✓ Optionally, notify the Library administrators of the guest Interest Group.

**Step 2:** Leaders or Authors of IG 2 make the shared space available in IG 2

From IG 2, navigate to the Library or the Space where you want to create the shared space

**Create Space**

- ✓ Name your Space
- ✓ Select **Share Space Link** on Space type
- ✓ Then select the shared space from the list



**If the shared space does not appear in the list we recommend retrying step 2 in 15 minutes.**

The Space is now open to consultations from the Interest Group 2 while the other Spaces of Library that has shared the space remain available only to members of that Interest Group.

**How to remove an Interest Group from space sharing?**

At any time the Interest Group can be removed from space sharing.

### **Interest Group invited other Interest Groups**

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

## Interest Group is guest of another Interest Group

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 Library contents

An administrator can add, create, modify and delete content and also perform specific actions over content such as adding translations.

### *About multilingualism*

CIRCABC creates links between a given content and all of 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 *OSS CIRCABC User Guide* provides a detailed description of how CIRCABC handles multilingualism (see '*How to deal with multilingualism*').

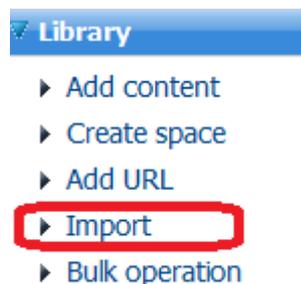
### *How to add content*

Information about adding content can be found in the 'Create spaces and add content' under 'Perform common actions in Library' section of the *OSS CIRCABC User Guide*.

### *Import contents*

#### **Import**

Files can be uploaded in bulk using the Import functionality.



A detailed explanation of how to upload a series of documents in one batch is available in the 'Download or upload documents in bulk' section of the *OSS CIRCABC User Guide*.

## Import via FTP

**From inside the European Commission only**, it is possible to request an FTP access to be able to upload a larger volume of documents.

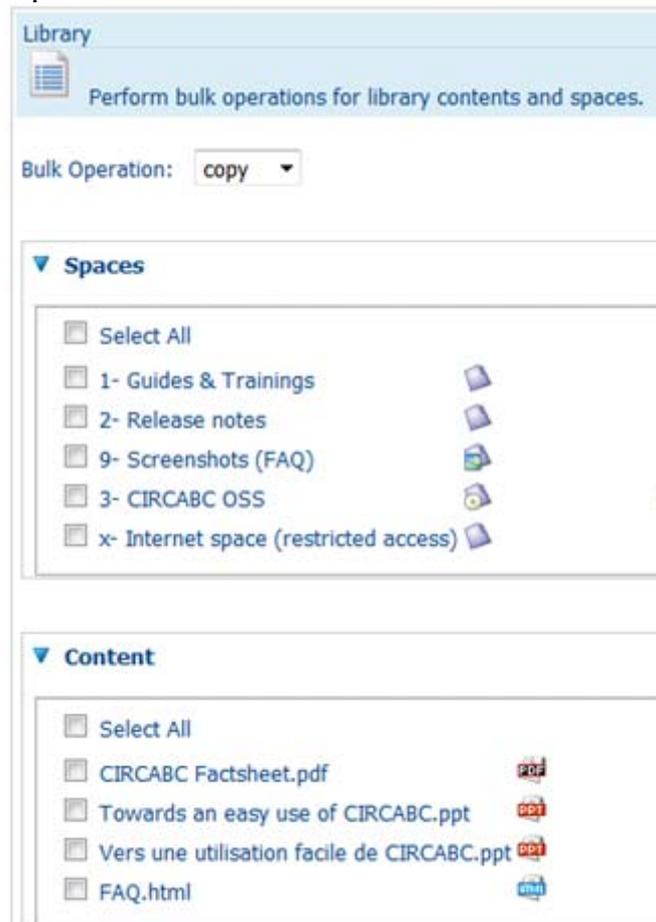
Note: when uploading via FTP there is no check box for enabling/disabling notifications.

- *If notifications are enabled, members will receive one email notification for each document uploaded.*
- *To avoid this disable the notification mechanism before uploading or cut the inherit parent space permissions for the space where the documents will be uploaded*

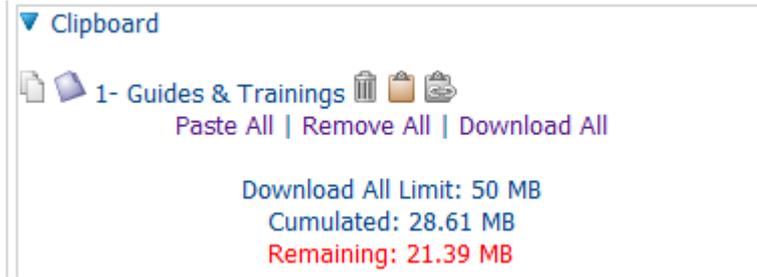
## Bulk Operations

Bulk Operations allows Library Spaces and contents to be copied, moved and deleted. The selected contents are placed in the Clipboard from where they can be placed in another section of the Library

The path Library > Bulk Operations will open a page with the list of spaces and documents to be selected plus the drop down menu of actions



After selecting the files to be copied, cut or deleted, click Ok to confirm the action. The selected files will appear in the Clipboard along with details on the remaining capacity.



Depending on the action to be performed:

### Move contents

Browse to the area of the Library where the space/contents are to be placed and select 'Paste All' to complete the move.

### Clear the Clipboard

'Remove All' removes the items from the Clipboard.

### Bulk download

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

Bulk downloading is done in three steps:

- ✓ Select and copy contents
- ✓ Click on link 'Download all' from the Clipboard
- ✓ Open or save the resulting zip file

## Content versioning

### About Versioning

The contents are automatically versioned when they are uploaded (or pasted from a different space). The first instance is displayed as version '1.0'.

Version	Notes	Author	Date	Actions
1.0		TestLeader	18 December 2007 16:19	View Properties

Page 1 of 1

All the versions of a same content are listed in the '**version history**' section of the 'content properties' page (accessible through icon ). The following is displayed for each version:

- ✓ Version number
- ✓ Notes
- ✓ Name of the author
- ✓ 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**

Note: Security Ranking is metadata for the document. In CIRCABC, all documents will be downloaded via https. Documents with the 'Internal' and 'Limited' rankings will be excluded from bulk downloads, however they can be downloaded individually. Restricting access to content and spaces is done with access profiles and roles.

## ***Modifying contents***

### **Updating a content**

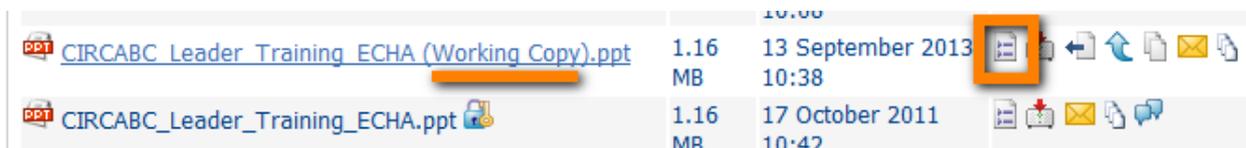
Detailed information is available in '*How to update contents*' in the *OSS CIRCABC User Guide*.

### **Check out and Check in contents**

**Check out** creates a **working copy** where the user make the changes while the main document remains **locked** for all other users. Once the changes have been made, the document is **checked in** which replaces the original document by the working copy, updates version and unlocks the content.

Leaders are also able to check in locked documents:

From the **View detail** of the working copy related to the locked document:



 CIRCABC_Leader_Training_ECHA (Working Copy).ppt	1.16 MB	13 September 2013 10:38		    
 CIRCABC_Leader_Training_ECHA.ppt	1.16 MB	17 October 2011 10:42		   

Click on **Undo checkout** or **Check-in**.

For additional information refer to the '*Check out and check in content*' section of the *OSS CIRCABC User Guide*.

## **Managing Library users**

'**User management**' deals with changing the rights for the whole Interest Group. The following is an explanation of how to modify the role played by a Member in the Library or even a part of the Library.

### *What is user management for?*

*- It allows you to restrict access rights to a specific space - some users will not be able to view the space, some will be able to read and download only and some will be able to upload and edit documents.*

### ***Library Roles***

The following **roles** can be assigned for the Library:

**No access:** Access to the Library is denied

**Access:** Able to read and download contents and view their properties

**Edit only:** Edit contents; cannot create or delete any contents

**Manage own:** Create, edit and delete own contents and access (read and download) the documents created and managed by other members.

**Full edit:** Create contents and edit the content of any owner; can only delete own contents.

**Administer:** Same rights as the full-edit role plus the ability to delete any content, organise the Library and manage users.

## *Changing a user or profile roles for a Space*

### **How to change the role of an access profile**

*In the following example, the Library of the Interest Group 'Antartica' contains three Spaces:*



**Spaces in the Library of the IG 'Antartica'**

#### *Problem:*

*The Interest Group Leader wishes to assign rights for the Space 'Wild fauna' as follows:*

- ✓ *'Access' profile can add their own documents in the space while being able to read/download contents in the rest of the Library.*
- ✓ *'Authors' will not be allowed to upload and will read only in this Space while retaining the rights to upload, edit and delete on the rest of the Library.*
- ✓ ***Registered** and **guest** users will not see the space Wild Fauna while still being allowed to download from the Library (role 'Access' for the Library).*

#### *Resolution:*

- ✓ *The role 'Access' of profile 'Access' will be changed to **'Manage own'** on the Space 'Wild fauna'*
- ✓ *The role **'Full edit'** of profile 'Author' becomes 'Access'*
- ✓ *No changes to profile 'Registered'*

To manage the rights for a specific Space:

From the 'Spaces' pane, click on the Space name/title, then:

[Administration > Manage permissions](#)



The list of access profiles is displayed:

- ✓ *Deselect (uncheck) the option **'Inherit Parent Space Permissions'***
- ✓ *Click **'Grant new user/access-profile'***



**The inheritance is deactivated: Access removed for all profiles on this Space**

On the 'Change access rights' page, select the new rights for each profile for this Space:

- ✓ Select a profile
- ✓ Assign the role
- ✓ Repeat this operation as many times as necessary, press 'Add to list' for each profile/permission pair
- ✓ The profiles which are not selected will not be able to access the Space
- ✓ When done, press 'Next' and choose whether or not to notify the affected users.
- ✓ Press 'Finish' to save the changes

*For the 'Wild fauna' space example above:*

- ✓ *Select profile 'Access' and assign the role 'Manage own'*
- ✓ *Select profile 'Author' and assign the role 'Access'*
- ✓ ***Do not*** *select 'Registered' or 'Guest'*
- ✓ *Select the other profiles which should retain the same access rights, and assign 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)

**'Registered' and 'Guest' will NOT have access to this Space**

*Press 'Finish' and verify the list of members or profiles allowed to access 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 'nsuppci' 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

## More about the inheritance process

The rights to access a Space are inherited from one level above – IG level > root of the Library > Space > Subspace > Contents.

If the lower level is assigned a right opposite to what is allowed at the highest level, the stronger rights take priority over the weaker ones. This means that in our 'wild fauna' example, keeping the inheritance activated would result in the following status for 'Access' and 'Author':

- ✓ 'Access' would be given permission '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'.

*Cutting 'inherit parent space permissions' for a Space can be used:*  
- To assign a profile with different role than is provided at the level of the parent Space (or Library)  
- To prevent a space from being viewed by certain profiles

The disadvantage of deselecting 'Inherit parent space permissions' is that for each space the users or access profiles need to be invited with the new access rights. This is done via the 'change rights' page (*in the example above, 'Leader' and 'Contributor' are re-invited and receive their initial roles*). This defines the actions that a user can perform.

## Permission to access a subspace

The same '**Manage space permissions**' procedure allows you to invite members of your Interest Group to a 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](#) > [Grant new user / access-profile](#)



This launches the wizard for changing the access rights. Click '[User](#)' instead of 'Profile' then search for the member and allocate a new role.

For more information about restricting spaces to subsets of user, refer to the CIRCABC – Information Hub under Tutorials <https://circabc.europa.eu/w/browse/c08dc5fb-022d-4983-8d62-3b288925d432>

- ✓ How to build a restricted access per space
- ✓ How to build a restricted and public access to the Interest group

## Events Service

General information about the events as well as how to check appointments can be found in the *OSS CIRCABC User Guide*.

The Leader guide explains the actions that only an administrator can do in the 'Events' Service.

## Events roles

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

- ✓ Administrator
- ✓ Access
- ✓ No access

IG Leaders by default are assigned the role 'Administrator'. This means that Leaders can [create](#), [modify](#) or [delete appointments](#) and can view the menu:



**Administer events menu**

## Manage events

### *View Events/Meetings*

View events or meetings over a selected time period:



## Create an event or a meeting

The main difference between Meetings and Events is that only Meetings offer the users the opportunity to accept or reject the invitation.

To schedule an event:

From the IG main menu:  
**EVENTS > Create event / Create meeting**

Follow the link 'Create event' to activate the three-step creation wizard:

- ✓ Enter general information
- ✓ Define an audience
- ✓ Provide details about the organiser

### Step 1 - Enter general information

Provide a name and description, degree of priority, the place where the event will occur and other details.

**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:  Only Once  
 Daily for times  
 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

Set the occurrence rate of the appointment:

*In the illustration above, we prepared a single event: the option 'Only once' is checked in the field 'Occurs'.*

Set up a series of events by combining a periodicity and a number of occurrences.

*In the example below, we scheduled a weekly appointment to be repeated three times:*



**Various periodicities are possible**

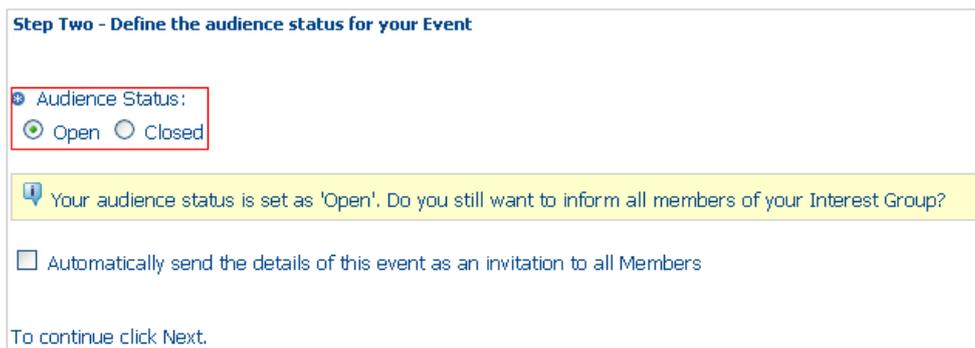
## **Step 2** – Define the audience

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

**Open** events are limited to members of an Interest Group.

**Closed** events can bring together:

- ✓ Members of your Interest Group
- ✓ Members of any other CIRCABC Interest Group
- ✓ Registered users - users who are logged into CIRCABC and are not members of an Interest Group
- ✓ Anonymous users - users without a username or are not logged in



**Every member of the Interest Group may attend this event**

In the case of a **closed** event, a screen is opened where the participants can be added:

The screenshot shows a web interface for adding participants to a closed event. At the top, under 'Audience Status', the 'Closed' radio button is selected. A yellow message box states: 'The audience status has been set to 'Closed'. Please, specify the participants.' Below this, 'Part A: Write the emails of the external users (separated by 'Enter')' contains a text area with the emails 'HBerlioz@yahoo.fr' and 'Jphil.Rameau@barocco.fr'. 'Part B: Select internal users' features a dropdown menu set to 'All Users', a search input field containing 'lerouge', and a 'Search' button. Below the search, it shows 'Results for 'lerouge' in 'All Users '. Clear Results' and a list box containing 'Erick LEROUGE (AstroCloA@gmail.com)'. An 'Add to List' button is positioned below the list box. At the bottom, a table lists internal users:

Name
Amadeus WEBER
Aida VERDI

Participants from outside and inside CIRCABC can be invited

**Step 3 - Provide details about the organiser**

By default, the person who created the event is the organiser. Verify and edit the information as necessary.

The screenshot shows the 'Step Three - Contact Information' form. It contains the following fields:

- Name: Stella BLACKDUST
- Phone: 1234567
- Email: AstroClo0@gmail.com
- URL: (empty)

At the bottom, it says 'To continue click Finish.'

A different organiser assigned

## Create a Meeting

Creating a meeting follows the same steps as for creating an event plus an additional step to set a relation between the meeting and a Space in the Library of the Interest Group.

In step 2 of setting up the meeting properties, optionally select a subspace of the Library:



You could as well not select any space

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



## Modify Events

To edit an event or meeting:

From the IG main menu:  
EVENTS > View Events/meeting > icon  > actions 'Modify ...'

-  Modify General Information
-  Modify Contact Information
-  Modify Audience

### Change general information

Almost all data can be modified with the exceptions of changing the dates of a repeated appointment and the standard time zone.

### Modify contact information

The organiser can provide different contact information (e-mail, phone, etc.). The changes are specific to this appointment only. The CIRCABC user account of the contact is not affected.

## Modify audience

It is possible to swap between open and closed audiences.

## Delete events

To cancel an event or meeting:

From the IG main menu:  
EVENTS > View Events/meeting > icon  > action 'Delete'

 Delete

*To cancel occurrences of repeated events, should the whole appointment be deleted?  
- It is possible to remove either single occurrences or the entire series (see example below).*

*We have scheduled a meeting which should be repeated daily between the 1<sup>st</sup> and 3<sup>rd</sup> 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 three times**

*If for any reason, we have to cancel the appointment of Saturday May, 2<sup>nd</sup>. We display the calendar and click the link '- 14:00 M' on the cell labelled '2' to display the details of this meeting. We click 'delete' in 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.

**Either one occurrence or the full series can be deleted**

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

May 2009 >>

day	Thursday	Friday	Saturday	Sunday
	30	1 May	2	3
		- 14:00 M		- 14:00 M

**When complete only the appointment of May 2nd has been removed from the calendar**

If the first appointment of a series is cancelled, the meeting details will be refreshed with the date of next occurrence. The 'start date' field will not change.

## **Newsgroups Service**

Newsgroups is the online discussion service of Interest Groups where members can hold conversations in the form of posted messages. The Newsgroups service is a collection of 'Forums' that contain 'Topics' and 'Discussions'.

Optionally, discussions can be moderated (messages need to be approved by a moderator before they become visible).

General information about Newsgroups and forums can be found in the *OSS CIRCABC User Guide*.

The *CIRCABC Leader Guide* explains only the actions that Newsgroup administrators can perform.

### **Managing Newsgroups Users**

#### ***Roles in the Newsgroups service***

Participating and performing actions in Newsgroups is conditioned by the role that has been granted for this service. The role is assigned by any Interest Group administrator (the IG Leader, for instance).

Specific roles for the Newsgroups service:

**No-Access:** Cannot even see "Newsgroups" listed in the main menu

**Access:** Can only read posts

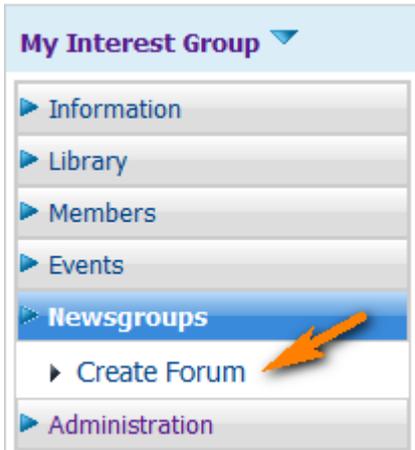
**Access and Post:** Can read and post message; can edit or delete your own posts

**Moderate:** In addition to creating topics and posts, can approve or reject any subject or message created in a moderated forum

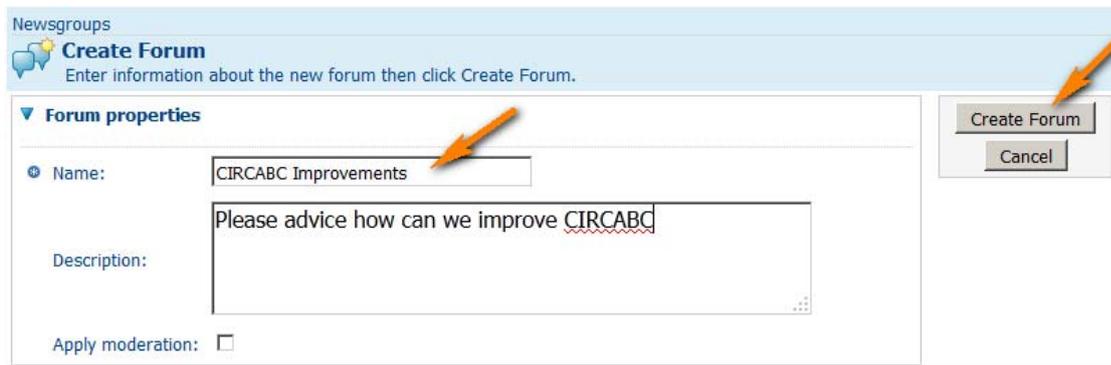
**Administer:** Can create, administer and delete forums. Consequently, can create topics and post messages; can also delete any topic or message.

## Create a Forum

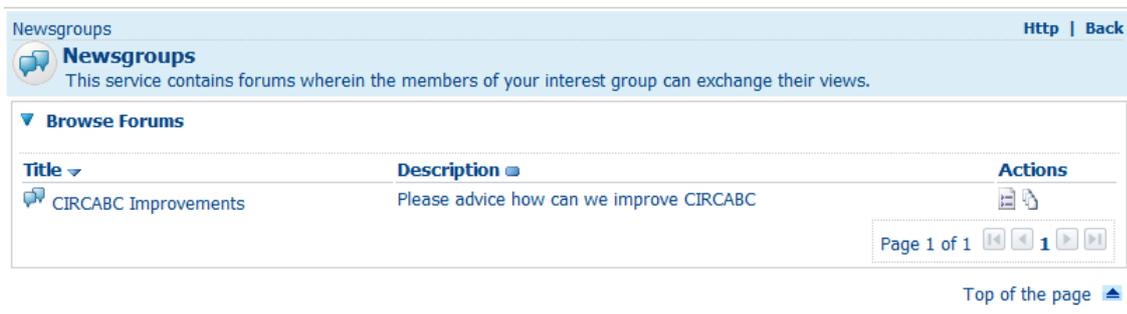
To enable discussions, a Leader must first create a new Forum:



**Name** the Forum and specify whether it is **moderated** or not (the description is optional).  
Then **Create Forum**:



A screenshot of the "Create Forum" form. The form has a title "Create Forum" and a subtitle "Enter information about the new forum then click Create Forum." Below this is a section titled "Forum properties" with a dropdown arrow. It contains two main fields: "Name:" with a text input field containing "CIRCABC Improvements" (indicated by an orange arrow), and "Description:" with a larger text area containing "Please advice how can we improve CIRCABC". Below the description field is a checkbox labeled "Apply moderation:" which is unchecked. To the right of the form are two buttons: "Create Forum" (indicated by an orange arrow) and "Cancel".



A screenshot of the "Browse Forums" section. It shows a table with columns for "Title", "Description", and "Actions". The table contains one row for the forum "CIRCABC Improvements" with the description "Please advice how can we improve CIRCABC". Below the table is a pagination control showing "Page 1 of 1" and a "Top of the page" link.

Title	Description	Actions
CIRCABC Improvements	Please advice how can we improve CIRCABC	 

Page 1 of 1   1  

[Top of the page](#)

## Moderated forum

Discussions can be moderated when messages need to be approved before becoming visible. The role 'Moderator' can be assigned by an Interest Group Leader.

The screenshot shows a forum post by Mounir MARZOUK with the subject 'Online editor'. The post content is 'I propose to add an on line documents editor,'. The post is in a 'Posts waiting for approval' state, indicated by a red box around the top right. A 'Watch this thread' button is also visible. The post was posted on 31 December 2013 at 11:58. There are icons for approving, rejecting, and deleting the post. A 'Signal an abuse' button is located at the bottom right of the post.

## Creating new topics

Navigate to the **forum** where the new topic is to be created.

*Leaders must first create a Forum, then Authors, Contributors or anyone with 'Access and Post' permission can create a Topic in the Forum*

## Delete a Forum or post

Click on **View detail** icon next to the Forum or Topic

The screenshot shows two sections: 'Browse Forums' and 'Browse Topics'. In the 'Browse Forums' section, there is a table with columns 'Title', 'Description', and 'Actions'. The first row shows 'CIRCABC Improvements' with the description 'Please advice how can we improve CIRCABC'. The 'Actions' column contains a 'View detail' icon (a document with a magnifying glass) which is circled in orange. Below the table is a pagination control showing 'Page 1 of 1'. The 'Browse Topics' section has a similar table with columns 'Title', 'Number of Replies', and 'Actions'. The first row shows 'Online Editor' with 0 replies. The 'Actions' column contains a 'View detail' icon, also circled in orange. Below the table is a pagination control showing 'Page 1 of 1'.

Click on **Delete Forum** or **Delete Topic**, or navigate to the topic and click on **delete** icon

The screenshot shows a forum post by Mounir MARZOUK with the subject 'Online Editor'. The post content is 'I propose to add an online documents editor,'. The post was posted on 31 December 2013 at 13:47. There are icons for approving, rejecting, and deleting the post. An orange arrow points to the delete icon (a trash can) in the top right corner of the post.



## **Information Service**

### **About the Information service**

The **Information Service** is where an Interest Group's website is hosted. This can be visible to invited users only or to everyone.

This service consists of two parts:

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

### **Information Service roles**

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

**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 for the Information service

By default, Interest Group Leaders are assigned the role **Administer**.

### **Presenting the Interest Group**

A **mini website is created** locally on a computer and the elements **uploaded** to the Information Service. Finally the elements are **associated with an index file** where links are set to the documents to be browsed on the publishing area.

#### ***Creating an information page***

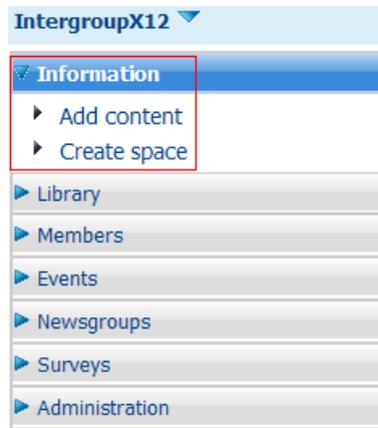
The web pages for the Information Service are created off-line then uploaded to the Interest Group Information Service repository.

To access the repository:

From the IG main menu:  
INFORMATION > Browse repository



Click on '[browse repository](#)' to find the commands for uploading to the information site:



**Two commands and the information site takes shape**

- ✓ Click '[Add content](#)' to load the html file.  
*In our example, we add 'EU-gallery.htm'.*
- ✓ Then '[Create space](#)' to create the space where the files will be uploaded. This space will be related to the htm(l) file loaded in 'Content' (similar to a 'file folder') and will contains the documents to be inserted into the web page, such as images.

*Our folder 'EU-gallery\_files' contains 5 pictures.  
We create the space 'EU-gallery\_files' and upload the 5 images.*

A future release of CIRCABC will offer the opportunity to load these documents in bulk.



Uploaded web pages on the 'Information service' repository

- ✓ Lastly, the content is linked to the space through an **index**.

Configure 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](#)



The index has the same name as the htm(l) file uploaded as content. On the page '[Modify space properties](#)', input the exact name of htm(l) file in the field 'Index page'.



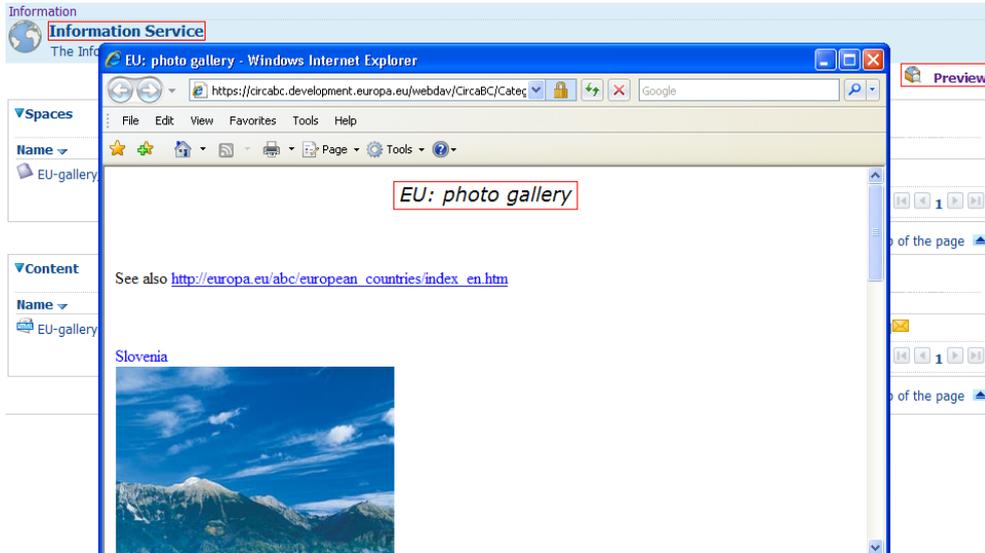
Tick 'Adapt' and the information page is displayed in the same window

Confirm the changes and close '[Edit Information Service properties](#)'.

*How can I verify the layout of my new Information page?  
- Through the 'Preview' link on the Information Service main page*



*In the example below, 'Adapt' was un-checked: the information page opens in a new window.*



**A preview of the new information page**

### ***Modifying an information page***

Spaces in the Information Service are similar to those in the Library and can be edited or removed in the same way.

Contents have the same properties as those in the Library and similar actions can be performed on them.



## Administer the Interest Group

Interest Group Leaders and Administrators can manage the group at the levels of the entire Interest Group, the services... using the Administration console.

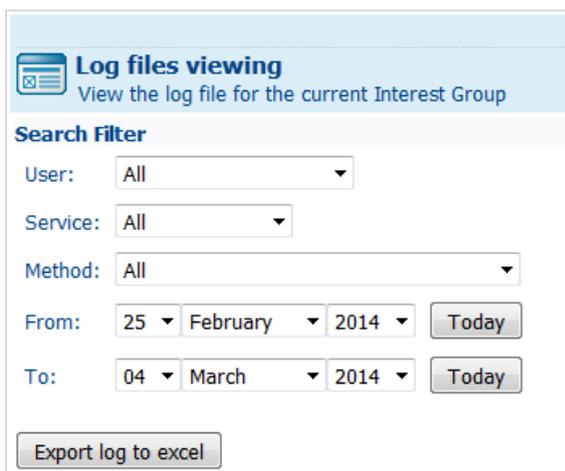
### Administer the Interest Group

The level Administer the Interest Group allows Leaders to configure settings over the group as a whole.



### *Log Files*

Log files allow administrators to view actions by user, by service, by method (type of action) and by date range.

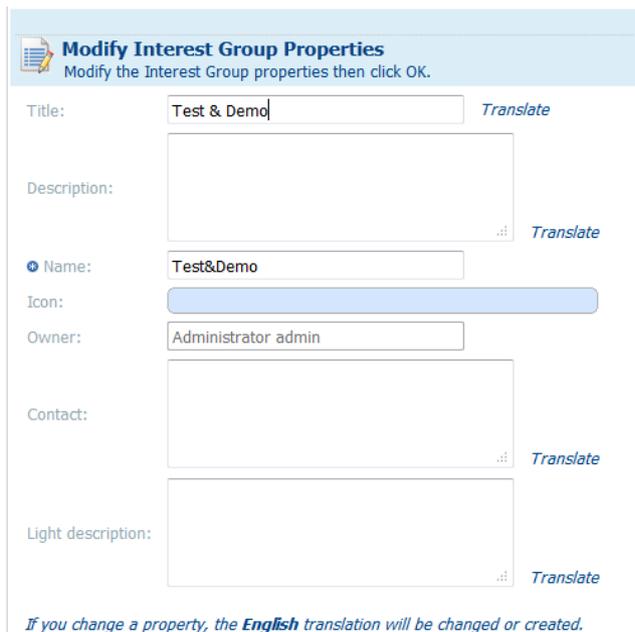
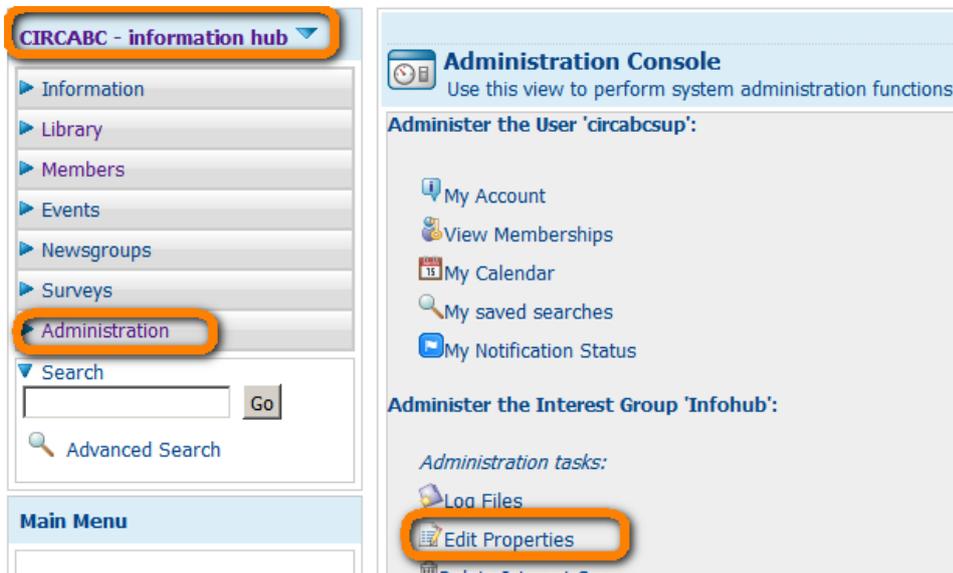


### *Edit Properties*

To change the title, description or contact information for the homepage of the Interest Group, proceed as follows:

Click on **Administration** (from the Interest Group homepage; from any other page of the group, follow this path: **Administration > Go to the interest group administration page**)

Click on **Edit properties** (under Administer the Interest Group "xxx"); make all the necessary changes  
Click **OK** to save the changes



### ***Interest Group summary***

The Interest Group Summary is where the IG Global statistics, Timeline activity and Interest group structure can be displayed and exported.

### ***Manage Auto-upload***

This is where uploads can be scheduled to automatically update documents from an FTP server.

More information related to auto uploads can be found in the OSS CIRCABC User Guide under 'Update via auto-upload' in the 'Perform common actions in the Library' section.

## ***Manage External Repositories***

This functionality is specific to European Commission users of the central repository 'Hermes' to facilitate registering of documents directly from CIRCABC. For more information, please contact DIGIT ARES SUPPORT.

## ***Manage documents***

The following actions, allow administrators to configure the following:

- Manage documents:**
- Keywords**
- Dynamic Properties**
- Notification Status**
- Manage paste notifications**
- Public saved searches for interest group**

## ***Keywords***

CIRCABC allows users to describe documents with a set of multilingual keywords defined by the Interest Group Leader as Library Administrator.

Content creators may add keywords from the list to the contents they upload or edit.

To define new keywords:

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

From any administration page:  
[Go to the Interest Group Administration page > Keywords](#)



Choosing keywords' takes you to the page '**Manage document keywords**' where you can:

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

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

 [Define new keyword](#)

**Keywords Defined**

Language Filter:

Value	Actions
Ausschuss der Regionen, alueiden komitean, Комитет на регионите, Committee of the Regions, Comité des Régions, Régiók Bizottsága, Coiste na Réigiún, Regionsudvalget, Comitato delle regioni, Il-Kumitat tar-Regjuni, Regionų komitetas, Regionide Komitee, Επιτροπή των Περιφερειών, Comitetul Regiunilor, Comité de las Regiones, Regionu 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](#)

 **Define new keyword**

From the page 'Define keyword', select a language, input the new keyword and press '**Add to list**'. Repeat these actions until all the preferred linguistic versions have been added. Finally, press '**OK**' to save the changes.

Language	Name
en	design
cs	designu

**A new multilingual keyword is added**

Click OK to return to the page 'Manage document keywords' to view the new keyword.

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

**The new keyword is displayed with the 'All Languages' filter**

*In the illustration below, we asked to display only the keywords in Czech.*

### Manage Document Keywords

Manage the document keywords define in this Interest Group.

[Define new keyword](#)

**Keywords Defined**

Language Filter:

Value	Actions
designu	 
Rad	 
Výbor regionů	 

**Only the keywords in Czech are shown**

## Edit keywords

Icons 'Edit' () and 'Delete' () allow keywords on the 'Manage document keywords' page to be modified/deleted.

To modify or delete only one linguistic version of a term, [select the relevant language 'Language filter'](#) then [click on the appropriate icon](#) beside the keyword to be deleted or modified. The corresponding dialog is launched.

*I would like to delete a keyword that was created in several languages. Does it need to be deleted language-by-language?  
- Not at all. Just select '**All languages**' as the 'Language filter' on the page 'Manage document keywords'.*

## Dynamic properties

CIRCABC provides default properties for contents and spaces, for instance: Name, Title, Description, Creator etc... To include additional properties (tags) specific to the IG needs, use '[Dynamic Properties](#)'.

By default, there are no 'dynamic properties' defined and these can optionally be created by an administrator of the group.

## Managing dynamic properties

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](#)



The list of already created dynamic properties is displayed for editing or deletion:

 **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;	 

[View the dynamic properties](#)

## Include additional properties in 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](#)



Type a [name](#), in as many languages as needed. Then [associate a value](#) to the name.

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

*We create a document property 'catalogue' available in the above-listed languages.*

We capture the *property description* in all the languages we need. The '*content language filter*' applied will determine which language the 'catalogue' will be displayed in.

**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

Click on Next, in step two we choose a *type* of property from the following:

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

If using the type 'selection' be sure to list each item on a separate 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: write one value per line

The records are displayed for validation. Press 'back' to edit or 'Finish' to accept the changes.

**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) katalogu

**If you agree, press 'Finish'**

The new property is now listed on the page 'Manage Dynamic Document Properties'.

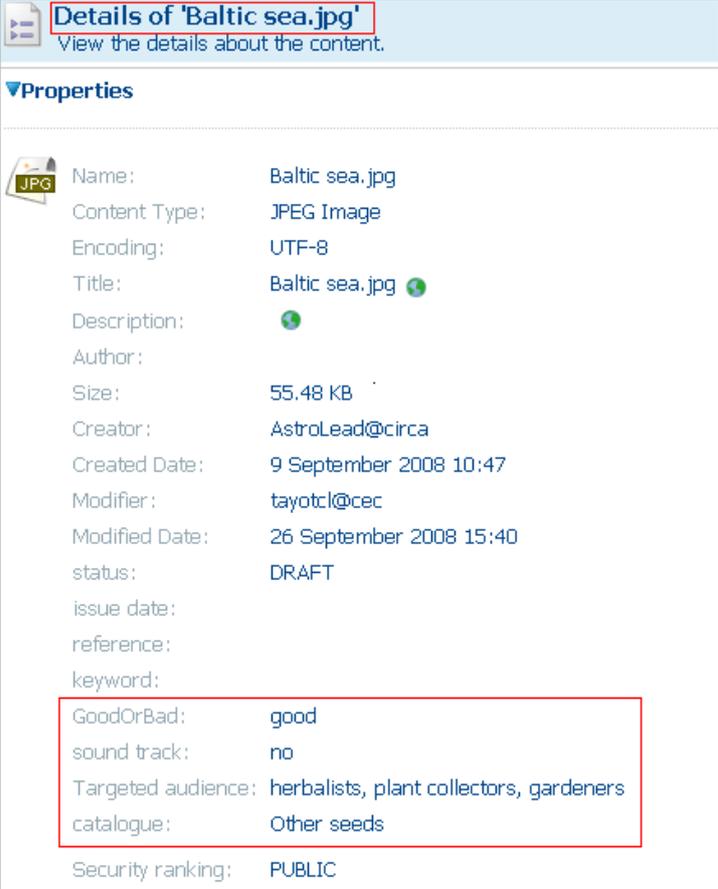
 **Manage Dynamic Document Properties**  
Manage the dynamic document properties defined in this Interest Group

 [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**

The dynamic properties are displayed with the details of Library contents. To add them retrospectively, run the action 'Edit content properties' ('contents' pane of the parent space > 'view details' > 'Edit content properties'). For all future uploaded contents the property will be proposed on 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 dynamic property***

To remove a dynamic 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 dynamic property***

To edit an existing dynamic property:

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

From any administration page:  
Go to the [Interest Group administration page](#) > [Dynamic properties](#) > [icon](#) 

It is possible to add or remove translations along with the actions to edit the property.

 **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	

**Add a new translation**

## **Notification status**

Interest Group Leaders can set up the global notification status for their users and profiles. To check or edit the members' notification profiles, and to define new profiles, use the 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, displays a list of the notification profiles already created.

Type	Name	Notification Status	Actions
User	beurpi	Unsubscribed	
User	AstroLead	Subscribed	

Page 1 of 1

The notification profiles set on the Library

### *Define a new notification status*

This allows Leaders to associate a notification status to specific users or access profiles.

*Providing the access profile 'Contributor' with status 'unsubscribed', for example, results in no Contributor receiving any notification. However, the 'Contributors' who wish to receive notifications anyway can override this status by individually subscribing to 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](#)

**Define Notification Status**

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	

**Contributors will not receive any notifications**

### ***Remove a notification status***

Use the '**Define notification status**' procedure to delete a status using the trash can icon beside the type of status to be removed.

### ***Modify notification status***

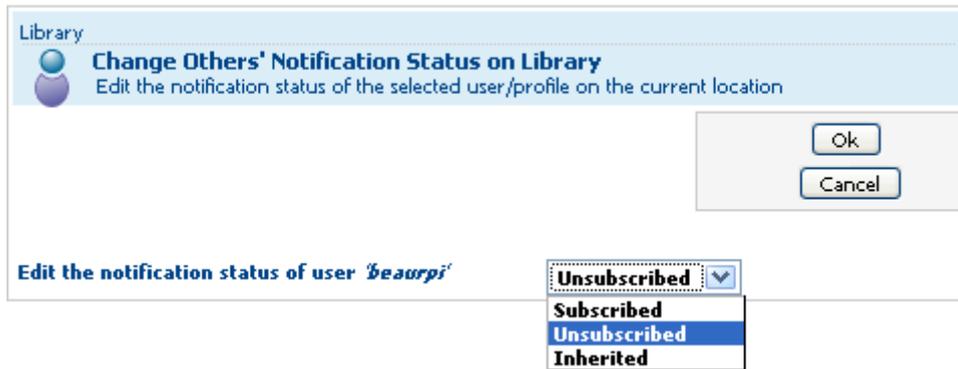
To change a notification status:

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**'



Three options are proposed:

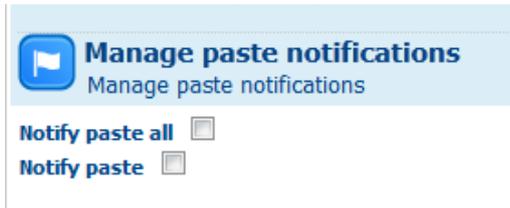


'Inherited' means users keep the status from one level above (default assigned for the whole group)

*The default notification for the Interest Group level is Unsubscribed*

## **Manage paste Notifications**

Allows administrators to select whether to notify users when documents are pasted in a space



## **Public saved searches for interest group**

Lists any saved searches for the IG

## **Manage look and feel**

The look and feel of the Library, Newsgroups and Information Services can be customised to make it easier to find favourite actions, group Library spaces on the same page, or reach posts in a few steps through the Administration console > Navigation preferences



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', there are options for modifying preferences for the different services:

Service	Type	Inherited from	Actions
Information Service	Contents (urls and documents)	/CircaBC	
Information Service	Containers (spaces and dossiers)	/CircaBC	
Library Service	Containers (spaces and dossiers)	/CircaBC	
Library Service	Contents (urls and documents)	Current Node	
Library Service	Discussions (topics on spaces or contents)	/CircaBC	
Newsgroup Service	Forums	/CircaBC	
Newsgroup Service	Topics	/CircaBC	

The customised items are displayed with the icon.

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 Containers (spaces) is customised

## Library interface preferences

The screenshot shows the Library interface with two main sections: Spaces and Content. The Spaces section has a table with columns for Title, Modified Date, and Actions. The Content section has a table with columns for Title, Size, Modified Date, Author, Version Label, Created Date, Status, and Actions. Callouts indicate where to specify optional columns, actions, and rows to display.

Title	Modified Date	Actions
Accessible		
Administer		
CIRCABC - user manuals	10 January 2013 10:43	
CIRCABC movies	18 March 2009 14:51	
direct-try	25 August 2009 08:34	
EMPL H4	25 November 2009 13:53	
essaipermissions	9 March 2010 08:35	
for testing purpose	28 May 2010 11:24	
GC-SANCO	7 December 2009 08:29	
GF-Estat	4 December 2009 08:10	

Title	Size	Modified Date	Author	Version Label	Created Date	Status	Actions
Assessment, monitoring and reporting under Article 17 of the Habitats Directive	341 KB	10 January 2013 10:58	Carlos Romão	1.0	10 February 2010 14:27	RELEASE	

### Customise the display of Spaces and Dossiers

Edit the Library Service – Containers (spaces and dossiers) to customise the display the Library's page:

#### Specify breadcrumb and navigation behaviour

Layout of breadcrumb

- Shortname  Title

With this option you can chose if the banner breadcrumb uses shortname or title to render the navigation list.

#### Specify mandatory columns

- Display the name.  
 Display the title.  
 Display both (name and title).  
 Display both (title and name).

*What is the difference between displaying name or title?  
The name is the file name.  
The title is either generated by the tool (e.g. Microsoft Word), or taken from the document metadata.*

Additional [properties can be displayed](#) on the main page of the space, such as the number of documents contained in the space, the path from the root of the Library...



Select a property and press the green-labelled arrow

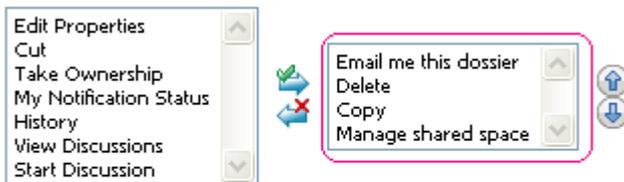
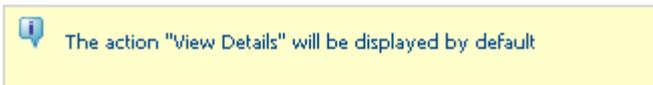
The selected properties are added into the right-hand column. Change the order by using the up or down arrows. The 'Reject' icon (✖) will remove the selection.



Display by title, modification date and number of items per space

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

#### Specify actions



#### Specify other options

Initial Sorting column: <First Column>

Initial Sort descending:

Row to display: 30

Changes can be cancelled by using the links ['revert changes'](#), ['load default values'](#) or icon ['Reject'](#).

### Contents display preferences

Proceed in the same manner to display a set of properties and actions on the 'contents' pane of any parent space. The number of contents shown per page can also be configured.

## Discussion display preferences

To view, at a glance, how many replies a post received or if it was approved, set this in navigation preferences for discussions attached to a content of the Library.

## Other navigation options

Navigation inside forums or topics can be customised using the 'Newsgroup service'. The page for managing the Information service can also be adapted to your preferences.

## Logos

Logos can be added to 'brand' the Interest Group and to distinguish between the different services.

To manage logos:

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

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



Managing logos is done in three major steps:

- ✓ Upload logos
- ✓ Configure the logo display (picture size, location...)
- ✓ Make the logo visible on the different pages

Different logos can be used for each service of the Interest Group.

## *Upload a logo*

Upload a logo from a computer or from the Interest Group Library. It will be stored in the 'list of available logos'. The logo can be made the [default one for the 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 

## *Configure and place the logo*

Customize the display of the logo for:

- ✓ the group homepage
- ✓ 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' displays the selected logo in place of the default logos**

## **About Search**

### ***Which kind of search?***

The search engine explores the metadata and content to facilitate finding spaces, contents or posts from anywhere in the Interest Group.

For additional information regarding the Search functionality, refer to '*About searching*' in the *OSS CIRCABC User Guide*.

### ***General search***

A **general search** allows you to ask for text to be retrieved from the name, title and/or content of any space or document. The general search enables you to perform the most frequent queries.

### ***Advanced search***

Use the **Advanced search** to execute finer searches built on queries involving dates, time spans, specific file formats ... You can also use it in order to search in specific sub-spaces.

## **Save and re-use queries**

General and advanced queries can be saved in CIRCABC for future use  
For more information refer to the '*How to save and re-use searches*' section of the *OSS CIRCABC User Guide*.



## **Need further support?**

### **FAQ's, Guides, Tutorials and Training Materials**

Additional resources are available on the public Interest Group ' CIRCABC – Information Hub' (under Category 'DIGIT'):

#### ***CIRCABC FAQs***

<https://circabc.europa.eu/webdav/CircaBC/Informatics/Infohub/Information/en/index.html>

#### ***OSS CIRCABC USER Guide (PDF) & LEADER Guide (PDF)***

<https://circabc.europa.eu/w/browse/5b627009-61e7-4d9e-8c8a-689a33ac8955>

#### ***Training (PPT) – Step 1 Manage your documents / Step 2 Manage your Interest Group***

<https://circabc.europa.eu/w/browse/1cc24c94-c571-4191-b414-8bdf766151ec>

If links in this document do not work in your browser or take you to the CIRCABC main page, please copy and paste them into the URL bar of your browser.

To browse to **CIRCABC – Information hub** step by step:

From the entry page <https://circabc.europa.eu> follow  
Browse Categories > DIGIT (under European Commission) >  
CIRCABC – Information hub

## **Contact DIGIT CIRCABC OSS**

Contact [DIGIT-CIRCABC-OSS](mailto:DIGIT-CIRCABC-OSS@ec.europa.eu) (DIGIT-CIRCABC-OSS@ec.europa.eu).  
Please include the following information:

Name  
E-Mail  
Organisation  
Telephone number  
Description

In addition please provide information to facilitate troubleshooting such as:  
Name of the CIRCABC Category and Interest Group  
The CIRCABC Service that is affected  
Attach a screenshot of the error message received  
Any other relevant information regarding the problem

