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Chapter 1. Introduction

Big Content Portal Application provide to any user a simple graphical interface to manage API content features.

This application allows to configure main administration operations available.

1.1. Goals of this document

The goal of the document is to show/describe in a simple way the main characteristics and functionalities of the application, through quick guides where the basic procedure of each functionality is described.

1.2. Target audience

This document is aimed at developers and administrators responsible for the configuration and management of Big Content integration.
Chapter 2. What is the Big Content Front-end?

The Big Content Front-end (BC Portal) is a graphic interface from which administrators are able to execute the main functionalities to manage the files of their Documents-Stores.

The main functionalities which can be carried out from BC Portal are:

• Search documents and content
  - By General Metadata
  - By Category
  - By Content
• Manage/Configure general metadata and metadata category of a specific document
• Manage file of a specific document
• Retrieve the binary file of a specific document
• Create/Delete Metadata Categories
• Configure the audit events related to a specific Document Store
• Search the audit events
• Upload new documents
• Configure and show the Audit trails
• … etc

Below, each of these functionalities and sections of the BC Portal will be described in detail.
Chapter 3. BC Portal structure

BC Portal home has three main sections:

• 1. **Header** Upper part of the BC Portal which allows us to:
  - Select the Document store
  - Choose the language of the BC Portal
  - View the permissions of the logged user
  - User Log-out
  - Resize the Central View section

• 2. **Central View** In the Central View section, the chosen functionality in the Lateral Menu is shown:
  - By default show all files and other General functionalities related to the management of the documents:
    - Basic & Advanced Search
    - File download
    - Share Link Generation
    - File Viewer
    - Document Information
3. **Lateral Menu** The lateral menu contains the links and access to the main functionalities of the BC Portal, which are shown in the Central View section.

- Access to Show All Files
- Access to Audit Event search
- Access to Content creation
- Access to Audit Management
- Access to Categories Management

From the lateral menu, it is possible to access other BigContent external resources:

- Big Content & BC Portal document portal
- Analytics and Monitoring portal - Grafana
- Technical support forum
- User log-out
3.1. Header functionalities

The header is visible in all the views of the application and all its elements are accessible from them.

The main functions of the header are described below:

1. (1) Toggle menu
2. (2) Resize menu
3. (3) Select Document-Store
4. (4) Select Language
5. (5) User information

3.1.1. Toggle menu section

The users can show/hide completely the lateral menu view.

- (1) From the Toggle Open/Hide Button the Lateral Menu can be hidden
3.1.2. Resize menu view

The users can resize the menu view from button two, located in the header section.

- (2) This button collapse the lateral menu view and provide more space in central view.

3.1.3. Document-Store selection

Users can select the repository (Document-Store), within the drop-down.

The list shows the repositories to which the user has access.

- To select the repository, click in (3) button, name of document-stores appears.
- (1) Click over the Document-Store dropdown list.

3.1.4. Select Language

The users can select the BC Portal language choosing between: English, Español, Français, Italiano.
To select the Language, click in (4) button, appear a name of language

(1) Click over the Language dropdown list

3.1.5. User information

In this section any user can make two basic operations:

(1) Show advanced user information (User profile).

(2) Sign out application.

Advanced user information

Internal information from user, domains and document store is shown.
• (1) Username and log in user.
• (2) List of groups.
• (3) Document Store and access role type information.

**User Log-out**

The users can leave the BC Portal from two different points in the application:

• (1) From the exit button in the Lateral Menu
• (2) From the Sign Out button which is shown when the profile icon is clicked.
3.2. Lateral Menu

In the lateral menu, appear three different sections, (1) access to different external services (bottom of logo), (2) Generic operations (Main menu section) and (3) Advanced management operations (Administrator panel section).

- (1) Access to external services. In this section you will find the links to external resources of Big Content:
  - Main portal of the asset.
  - Analytics and monitoring section.
  - Support forum.
- (2) Generic operations, available to all user.
- (3) Advanced management operations, only available to admins users.

3.3. Central view

The central view is a container where the rest of the functionality screens are loaded.

By default, 'desktop' section with repository documents list is shown.
Chapter 4. BC Portal User Roles

There are two types of roles within the application: \texttt{ROLE_RW} and \texttt{ROLE_ADMIN}

To see user access role in profile section:

1. Click in your profile icon
2. Select your name.
3. Appear the dialog with advanced user information. In the bottom view, in the section Document-Store, show a table with name and access type (role) for any Document-store associated.
4.1. Understating the Role access

4.1.1. ROLE_RW (generic user)

This kind of user can access to defaults options and perform a basic operations in the Big Content application.

- Access to Dashboard section
  - Perform simple and advanced search
  - Export result of search in CSV format
  - Generate share link on document
  - Download document
  - View categories assigned
  - View document online
  - Delete document and version
- Access to Document Detail view
- Access to Audit trails
  - Perform advanced event search
  - Show extended information
- Upload documents
  - Upload single or multiple documents.
  - Assign one or more categories to one or more documents.

4.1.2. ROLE_ADMIN (Administrator user)

This type of user can access and perform specific operations in addition to the generic user’s specifications on BC Api, and Big Content web application:

- Access to Audit management section
  - More description in specific section.
- Access to Category management section
- Create, show, edit or delete any category.
- More description in specific section.

- Access to Delete files section
  - Restore or permanently delete a document
  - More description in specific section.
Chapter 5. BC Portal Sections

5.1. Desktop View

Dashboard contain the main list of documents available in Big Content. It provides the different actions to manage documents: download, share, edit, view details. . . etc.

5.1.1. Manage documents

Big Content application provide a different actions to manage documents.

- (1) Document selected.
- (2) Document viewer: Click the name.
- (3) Navigate to document details.
- (4) Categories.
- (5) More actions: Manage document actions, navigate to detail of document, download or delete document.
- (6) Share document

Download document

The BC Portal allows the users to download the file associated with the document (current version). There are two different ways:
• (1) Download button
• (2) Appear new Window to show a document

**Document online viewer**

BC Portal application provide two forms to show a document.

**Delete document**

From the desktop view it is possible to delete the selected document.
Type of deletion is defined at the document-store level regardless of the permissions of the user with whom the operation is performed.

For more information about different types of deletion, visit types of deletion

- (1) Contextual menu, delete document button
- (2) Show message

**Share document**

'Share document' option generate links to documents. These links can be shared both with BC internal users and external users not associated with BC.

There are two ways in the BC Portal to generate links:
• (1) Select life time for share link.
• (2) Document share url generated
• (3) Copy url generated

By default, the generated link is valid for 10 days.

5.1.2. Common actions of documents.

Application allows you to apply actions on a group of selected documents.

Select group of items and right click on any of them, a new contextual menu will appear with the menu options.

• (1) Contextual menu.
• (2) Show details of documents selected: Show details of the documents and allow browsing among the selected documents.
• (3) Clean selection.
• (4) Delete selected documents: this options depends on permissions on document-store.
5.1.3. Document/File online viewer

The main formats which are viewed/reproduced from the BC Portal viewer are the following:

- Documents
  - PDF documents
  - TXT and open formats
- Image formats: jpeg, jpg, tiff, gif, bmp, png, svg.
- Video & Audio formats: MP4, AVI, OGG, MP3
- Other format: BC Portal generates a box that allows downloading the selected file.

There are two ways to view or reproduce the file associated with the document:

- From the view panel, we can access the viewer in two ways:
  - (1) Click in name of document
  - (2) Into the more option button, click “show online”

- In the document detail view, the document viewer appears by default.
  - (1) Online viewer
PDF file Viewer

The application use the browser embedded pdf plugin into browser.

If the user use the application in any old browser is possibility him can not view document. In this case is necessary the user update him browser. Old browsers are not supported.

Image file Viewer

The application includes a complete image viewer with some options.
• (1) Image viewer.
• (2) Image controllers.
• (3) Close button or click out of image.

**Video file Viewer**

The application provides a video viewer.

• (1) Video viewer and container.
• (2) Video controls.
Unknown file Viewer

For unknown document type, the viewer allows to download the file:

- (1) Document container.
- (2) Download document button.
5.1.4. Document search

Search options are available in 'Desktop View':

- (1) Basic search: This search allows the user to search for documents by their name (complete name or part of it).
- (2) Show/Hide advanced search: This button enabled the advanced search switcher.
- (3) Advanced search: This panel allows you to select the type of filtering to perform advanced searches; Search by metadata and categories or Search by content.
- (4) Filter panel: Allow to add different filters depending of advanced search type selected.
  - Search by metadata and categories:* Allow ‘Search by general metadata’ *(Id of Document, Name, Description, Author…etc)* and ‘Search by Category’.
  - Search by Content.
- (5) Search button: Execute the advanced search by filter.
- (6) List of results: Show the result of search.

**Basic Search**

This search allows to retrieve documents using their name (complete name or part of it). This search returns all files that match with the name filled into the search box (current and other versions).
• (1) Box of basic search.
• (2) List of results

Advanced Search

This search allows the user to search documents using General Metadata, Categories and Content.

Below, each of these advanced search types will be described in detail.

In the current version of the BC Portal, only the General metadata and Categories can be combined in one search, while the content search has to be launched on its own.

Search by General Metadata

General metadata search allows the users to find files by the common attributes shared by all elements of the Big Content.

This attributes are the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Detail</th>
<th>Observations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Id</td>
<td>A unique ID auto generated that identifies the document</td>
<td>The advanced searcher allows the client to search by complete id or part of it.</td>
</tr>
<tr>
<td>Field</td>
<td>Detail</td>
<td>Observations</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Name</td>
<td>Filename provided at the creation of the document</td>
<td>The advanced searcher allows the client to search by complete name of the file or part of it.</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Date when the document was uploaded</td>
<td>The advanced searcher allows the client to search by complete name of the author or part of it.</td>
</tr>
<tr>
<td>Author</td>
<td>User account that uploaded the content to BigContent</td>
<td>The advanced searcher allows the client to search by complete name of the author or part of it.</td>
</tr>
<tr>
<td>Modification Date</td>
<td>Date when the document metadata was modified</td>
<td>The advanced searcher allows the client to search by Modification Date range</td>
</tr>
<tr>
<td>Description</td>
<td>A description provided by the author of the document at the creation of it</td>
<td>The advanced searcher allows the client to search by complete description or part of it.</td>
</tr>
</tbody>
</table>

These attributes can be combined among them to adjust the search parameters.

**Search by Category**

Category search allows the users to find files by their associated categories or the attributes of these categories.
In the current version of the BC Portal only one category can be involved in the search.

Search by Content

Content search allows the users to find files by the content itself.

The features of this search are the following:

- The content can be searched over the current version of the document or over all versions of the document.

- Each word introduced in the content search box is a separated search. So it returns all the documents that have any of the specified words.

In the current version of the BC Portal, the content search cannot be combined with any other.
5.2. Document detail view

Documents are identified by metadata. The metadata includes, from one side basic information like the author, date of creation and on the other, the customized business information categories.

This information is shown in the Document Detail View.

5.2.1. Document details view elements

- (1) Icon and rapid actions to current version
- (2) List of version of document
- (3) Button to upload a new version of document
- (4) Document viewer
- (5) Dialog to show information about the current version
  - (5.1) Actions on current document
    - Download version
    - Create a share link
    - Delete document
- (6) Dialog to show information about version selected
  - (6.1) Actions on version selected
Download version of document
Delete version

- (7) Dialog to show and manage categories of document
  - (7.1) Actions to manage categories
- (8) Navigate to back document
- (9) Navigate to next document
- (10) Close view and navigate to dashboard view

5.2.2. Create new version

From the 'view detail option' it is possible to create new versions of documents easily and simply.

- (1) Click ‘select’ button to upload a new document from your computer.
- (2) ‘New document version' it is marked as to ‘current’ version and show in the lateral menu with a yellow mark.
- (3) In the general information box, the current version, date.. and other information are updated.
- (4) This new box, show the information about document version selected.

5.2.3. Change the current version

To change the current version of a document, just navigate to the desired version and click on the
option ‘set as current version’

(1) Select a version of document
(2) Click in ‘Set a current version’

On general metadata box, current version 1.0 is shown.
5.2.4. Category Assignment

The document categories created for a specific Document_store can be assigned to the document to classify the documents created in the Big Content from a business point of view.

Below sections are described:

- (1) To add or change categories in the document, click in ‘Add categories’ or ‘Edit Categories’. Below procedure are described:
  
- (2) Categories assigned on document

- (3) Show attributes

- (1) Change attributes or add a new category

- (2) Save changes
5.3. Audit trails view

The audit trails shown below are the result of the actions that are carried out on a «Document-Store».

Creation of documents, simple and advanced searches, visualization of content … etc

For more information about Audit Trails, visit Audit Trails

The procedure:

• (1) Select document store.

• (2) **Create a filter to search**: It is possible to indicate a range of dates and times, perform searches by the document identifier by a 'span-id' and others.

• (3) **Select audit trail**: If you want to search for a specific event, this is the time to indicate it. The search can only be carried out by type of event if it is configured and active in the audit.

• (4) Optional. Select number of result to search.

• (5) Button search.

• (6) Result search.

• (7) Show more information, only for operations available.
5.4. Upload document view

One of the most important views of the BC Portal application is the file upload screen. In this view, it is easier for any user to upload files to the repository.

It allows the configuration and assignment of categories to all these files, as well as the assignment of categories and descriptions of each document.

Procedure is described:

• (1) Container of Drop and upload document files.
• (2) Select file for computer.
• (3) List of document to upload.
• (4) Add global categories.
• (5) Input to create a description of document.
• (6) Select individual category.
• (7) Upload single document selected.
• (8) Delete document of list.
• (9) Upload multiple files.
• (10) Delete all files of list.
5.5. Audit management View

In this section, the administrator allowed can create and configure the audit for all operations available in the selected Document-Sotore.

The user can configure the audit event, just selecting the desired event.

The events that are currently being audited appear in blue, gray is for those that are not configured.

To improve accessibility and avoid errors, the user can see all available audit events organized by individual categories, by default all events are displayed.

For more information about Audit Configuration, visit Audit Configuration

Sections are described below:

• (1) Access to Audit management view
• (2) Document Store selector
• (3) Show all configuration sections
• (4) Select and show a single section to configure

5.5.1. Configure Audit trails:

Sections and procedure are described below:

• (1) Select valid Document Store
• (2) Select ‘Show all’ or single section to configure the parameters
• (3) Toggle the checkbox to enable or disable any option, appear in blue color when is enable and gray if the option is disabled.
• (4) Save all changes
5.6. Category management View

This view, only accessible for administrators, provide the options to create and manage of the categories stored in the Document-store.

From this view, it is possible to create, edit attributes, delete, and view all available categories.

For more information about Categories, visit Categories

This sections is described below:

- (1) Access to Category management view
- (2) Category container: This box displays information about the category and shows actions, edit, delete and display information. The box is shown in green when it is newly created (24 hours) and in blue the rest.
- (3) Create a new category
- (4) Show more information about category.
- (5) Edit category: To add new attributes.
- (6) Delete category: Only user admin can delete a category. If the category is in use, it can not be eliminated.
- (7) Show quickly number of attributes.

5.6.1. Create a new Category

To create a new category, click on the green button 'new category' located on the right side of the
screen, next to the name of the document-store where you want to create the new category.

Next, the assistant will appear that will guide you in the process, you just have to follow the steps:

**Category name**

To generate the category name, necessary to take into consideration that neither the name of the category nor the name of the attributes can’t contain spaces or special characters, except '_' and '-'

- (1) Name of Category
- (2) Continue to add attributes

**Create attributes**

To create an attribute follow the steps, you can create as many attributes as you want, by clicking on 'add attribute'.

To delete an attribute, click on the trash can icon.

Once the structure is defined, click on "save changes and continue".

In any moment it is possible to add or delete any attribute, as long as it is done before the end of the process.
• (1) Name of Attribute, the space and special characters are not permit.

• (2) Type of Attribute:
  - Numeric
  - Date
  - Boolean
  - Text String

• (3) Mark this check to indicate that attribute is required.

• (4) Add more attributes to this category

• (5) Save changes and navigate to create category

**Special type 'list options'**

Text String: This type of data, can provide creation of list of values permitted, this option is show in application as a selectable.
• (1) Type of Attribute.

• (2) List of values permitted.

• (3) Delete attribute: in any time before create category, this user can delete any attribute.

Create category

BC Portal application allows you to create the newly configured category in all available Document-Store (administrator permissions are mandatory).
• (1) Mark this check to create this category in any document store available.
• (2) Create category

Confirm category creation

Once category has been created, will be shown in the list of categories.

During a period of 24 hours it will be shown in green color and will appear in first position, after this period the category will automatically be sorted in the list alphabetically.
5.6.2. Edit Category

The BC Portal application allows you to edit any category available in the Document-store.

To ensure the consistency of data, it is not allowed to delete or delete attributes already assigned in a category, but it is possible to add new attributes.

Adding a new attribute is done in a similar way to the category creation process.

- (1) Adding a new attribute
- (2) Simple dialog to create and manage the various type of attribute available.

5.6.3. Delete category

Only ROLE_ADMIN role can delete a category. To guaranteed stability the document storage, categories in use can´t be eliminated.
Elimination of category 'Gasoducto'

Attention: You are about to eliminate a category. This is an irreversible operation and could have fatal consequences in the organization of your documents.

Permanently eliminate 'Gasoducto'

Error - This category is attached to some documents. This category is present in several documents and may cause problems if deleted.

Close