Central Repository and Search Engine

User Manual

Version 1.0.2

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Central Repository & Search Engine
CR 2.0

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Overview

Knowledge is a valuable asset of your company. The challenge is to find it when you need it. CR 2.0 is a Central Repository and Search Engine (CR/SE) server software application, which turns a company's distributed network file system into a secured and globally available knowledgebase portal. CR enables your company to better organize and manage the documents generated through the company's operations, accumulating data and growing a knowledgebase according to your organizational infrastructure and company policies.

What is CR/SE?

Central Repository and Search Engine (CR/SE) is a server software application to store and organize company data in a consistent manner such that data generated by the company through numerous projects may be carried forward as valuable knowledge for all employees, customers and business partners. With a state-of-the-art search engine technology, the accumulated data in CR becomes easily searchable and readily available to authorized users through a secured Internet connection.

Product Description

CR 2.0 is a turnkey solution that sits over your current network file system and creates a global knowledgebase for everyone in your company. With CR 2.0, you can access authorized information anywhere, anytime through a Web browser. It enhances global team communication and collaboration, and improves workplace productivity. CR 2.0 enables you to

- **Search corporate information globally**. The Google-like search engine enables you to easily find relevant information anywhere, anytime. CR 2.0 maps onto your corporate network to include documents from engineering, marketing, sales, customer support, human resources and others.
- **Establish security framework for document control**. CR 2.0 models flexibly multiple security classes and levels granting accesses to authorized users based on their departments, roles and on a need-to-know basis. As a result, just-in-time and relevant information are available and provided to the users.
- **Ensure high quality and consistency**. Standardized document classes and structures can be defined and reused for similar projects or products. Replication ensures corporate-wide consistency and meeting quality requirements.

- **Create a self-maintained knowledgebase**. There is no learning curve or change of user behavior in using CR 2.0; documents in the corporate network are automatically indexed and become searchable to users. CR 2.0 quietly and intelligently grows your corporate knowledgebase by including data from all disciplines of your business.

Central Repository User Model

Users logon through a Web Browser to access the Central Repository (CR 2.0) application. There are two types of users in CR, namely the site administrator and regular users.

Site Administrator

The CR site administrator (Admin) is responsible to set up the initial CR environment for all users. Admin can create and delete *project space* in the repository. A project space is a container that categorizes and holds the data files in the repository. Admin can also add or delete users and change the roles of the users in the CR application.

Admin is set up when CR is first deployed on a server machine in a domain. The Admin is identified by his/her user id and password. Since Site Administrator is a role in CR, conceptually you can have multiple people playing the Admin role. However, for best management practice, it is recommended to assign only one employee within a CR domain to be the Admin of that domain.

Regular User

Apart from the Admin, all the other users in CR are regular users. A person who has access to the CR application on the Web environment (for security reason, CR is usually set up behind the company firewalls although this is not a requirement) can submit a new user registration by clicking on the New User link on the CR home page. If CR is configured to enable automatic new user registration approval, the new user request will get processes automatically and immediately, otherwise, the Admin will receive a notification email to approve for the registration request. Once user has a CR account, which is identified with a User ID and a password, s/he can logon to CR and start accessing information stored in the CR application.

User Roles

Users play different roles in CR. A user can play multiple roles depending on the needs of the company. The following are the different supported roles and its semantics.

- **Site Administrator**. The role to initialize the CR environment for all other users. Admin has the right to add and remove all objects in CR. Admin can also change other users' profile including grant/revoke access authority to files in CR. S/he may also change the roles of other users.
- **Program Manager**. Program Manager (PM) role has all the right of a project coordinator, who is the owner of a project space. A PM may change a project

plan, project team and add or delete files from the project. We will talk about project space and project coordinator in later chapters of this document. A PM cannot change other users' profile or grant/revoke other users' access authority.

- **Add Project**. The Add Project role is given to users to create a new project space. Admin may grant this role to a group leader or project leader for a short period of time to allow them to create a project space on CR.
- **User**. The User role enables a person to access authorized areas and files in CR. All users have a user ID and a password to logon to CR.
- **Guest**. If the GUEST_SEARCH option is turned on in CR, then anyone who has access to the CR front page can use CR as a guest to perform search. Refer to the chapter on CR Configuration about changing the CR system configurations.

CR Project Space Security Model

The information stored in CR is organized by Project Spaces. A project space is like a directory in a file system. There are sub-nodes or sub-folders underneath a project space. These sub-nodes are called tasks, which holds the various file attachments within the project space. The layout of these tasks in a project space looks like an upside-down tree. This layout is called the *project plan* of the project space.

Project Space and Project Plan

A company uses project spaces to map to different products, projects or cases that are managed by the company. Files pertaining to the different projects or products are stored in the sub-tasks within the project space. All the sub-tasks together formed a project plan layout. This project plan may be changed over time.

Each project space has an owner called the Project Coordinator (PC). The PC may assign different users to be the owner of different tasks in the project plan. The task owner is responsible for the changes of the corresponding task.

Public and Private Project Space

A project space may be *public* or *private*. A public project is seen by all users logon to CR. A private project can only be seen and changed by project team members.

Project Team and Project Coordinator

A project space has a *project team*. A project team is made up of users in CR. The user who first created the project space is called the Project Coordinator (PC). The PC may later transfer his PC responsibility to another user within the project team. The PC has the right to make changes to the project plan and the project team.

In changing the project plan, the PC may add, delete, move and change the name of the tasks within the project plan. He may also post or remove file attachments from the tasks.

In changing the project team, the PC may add or remove users from the project team.

The PC may also assign any of the project team members to be owner of tasks of the project plan. A task owner is responsible for the change of that task. In CR, that means s/he can delete file attachments from the task.

All team members are allowed to upload files to the various tasks of a project plan. Whether they can open a file or not is controlled by the File Attachment

Authorization and has nothing to do with the Project Space Security Model. In other words, if a user is not authorized to access a certain file type, even if the file is stored in a task that he owns, or if s/he is the project coordinator, s/he still cannot open the file. The separation of the file access authorization model and the project space security model provides a high security protection to company documents. You may consider the project space architecture is for the sake of logically organizing data in the Central Repository. But accesses to the data are a totally different matter; data accesses are protected by the Document Authorization Model. A clear understanding of the separation of the Project Space Security Model and the Document Authorization Model is essential in gaining most benefits from the CR application.

Project Options

The PC may set different project options for his/her project. This will affect the experience of all users coming into this project space. There are three project options that may be set for each project space.

- **Submit project plan change by members**. Setting this option will allow project team members to submit a project plan change request to the PC for approval.
- **Expand project tree at start**. By default, when users click into a project space, a project plan will display only the top level of the project plan. If this option is set, when users click into the project space, the project plan display will expand to all levels of sub-tasks.
- **Notify all team members on new file postings**. This option enables CR to send notification email to all team members when someone uploaded new files to any of the tasks of this project space.

By default all three options are turned off when the project space is first created.

CR Document Authorization Model

CR uses a Document Authorization Model (DAM) to control users accessing documents stored in the Central Repository. The DAM supports document classification by type (or departmental type). In DAM, a company can flexibly define numerous document types. CR users are granted with one or more document type access authority. At the time of uploading a document, users tag the document with a certain combination of the document types. Authorization of (read) accesses is granted to a user when there is a type match between the document tag and the user's authorized type.

The following is an example of DAM.

In this example, a company defines three document (departmental) types:

- GENERAL
- ENGINEERING
- FINANCE

Let's assume that user X is given the authority to access GENERAL and ENGINEERING documents.

The following are some sample documents.

- Document A has type GENERAL.
- Document B has type ENGINEERING.
- Document C has type FINANCE.
- Document D has type GENERAL and FINANCE.

When user X tries to access each of these documents, the result is shown in the following table. The matching type is highlighted in boldface and is underlined.

Document's Type	User X Authority	Result
A: <u>**GENERAL**</u>	<u>**GENERAL**</u>, ENGINEERING	Access granted
B: <u>**ENGINEERING**</u>	GENERAL, <u>**ENGINEERING**</u>	Access granted
C: FINANCE	GENERAL, ENGINEERING	Access denied
D: <u>**GENERAL**</u>, FINANCE	<u>**GENERAL**</u>, ENGINEERING	Access granted

Note that as long as there is one match in the comparison between document's type and the user's authority, access is granted. Access is denied only if there is no match at all.

Default Document Types in Project Space and Task

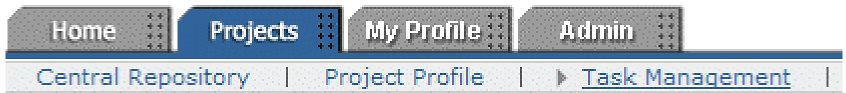
Project coordinator, Program Manager and Task Owner may specify default document types in project spaces and tasks. This is done either in the Update Project Profile or in Task Management Page, which are described in the chapter on Project Space in this document.

The default document type of Project Space is used to set up the default document type of its sub-tasks. The default document type of the task is used as the default document type of the file attachment at the time when file upload is done. Note that you can override the default at the time of upload by changing the Department value on the screen. This is described in the next chapter on Project Space under the section: Upload File Attachment to Task.

Project Space

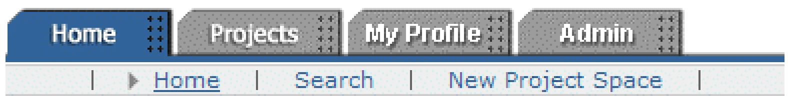
Project spaces are used as organized containers in CR to organize stored documents. Companies use project space to map to their projects, products, cases, or anything they logically used to handle their groups of data.

Click the **Project Tab** to go into the Project Space.



Create Project Space

Administrator, Program Manager and users with Add Project role may create project space on CR. For these authorized personnel, the **New Project Space** sub-menu item appears under the top menu bar when they login to CR.



View Project Plan

All the project space that a user is involved with will appear on the Home Page after s/he login. Clicking on the name of these project space will display the page to view the Project Plan. The page is labeled **Central Repository** on the top left-hand corner. Note that users may expand the project plan tree by clicking on the plus sign (+) next to the label **Task Name**. Likewise, clicking on the plus/minus sign (+/-) next to each of the task name will expand or shrink the corresponding sub-node.

Update Project Plan

The project coordinator may update the project plan at any time. To do that, click on the link **Update Plan**, which is located on the top right-hand corner of the **Central Repository Page** (i.e. the View Project Plan Page).

Once the user is in the Update Plan Page, s/he may choose to change the name of the task, delete a task, insert a task or append a task. Simply click on the corresponding link to perform these functions; the process should be self-explanatory.

You may also desire to move a task from one level or position of the plan to another. To do that, simply click **Change** of a particular task in the Update Plan Page. When the next page open up, instead of changing the name of the task, type the desired new heading numeric that you would like this task to move to. For example, to move the task 1.2 to 2.1.1, simply change the task by entering the Change Task Page and type 2.1.1 in the text box.

After you have made all the necessary changes to the project plan, submit the change by clicking the **Submit Button**. The changes will be shown to you. You may key in any comments related to this plan change, and then click the Submit Button on this page. CR will then publish the changes for you.

If the project option of allowing team members to submit project plan change is selected, then a team member may also go through the above process to make changes to the plan. However, when s/he submitted the change, only a request will be sent to the project coordinator. The PC may click the link in the email notification to access CR and approve or reject the request. Upon approval of the change by the PC, the change will be published. If the PC reject, there is no effect to the project plan. In either case, the request submitter will receive an email notification about the outcome of his/her request.

Saving Project Plan Template

Over time companies would have developed various project spaces for different types of projects or products. These are valuable knowledge representing the best management practice defined through company culture and experience. The Admin can save the project plans into the **CR Template Library**.

To save a project plan, logon as Admin and click into a particular project space that you would like to save. On the Central Repository Page (i.e. the View Project Plan Page), there is a link on the top right-hand corner available only to Admin. It is called **Save Plan Template**. Click on that and follow the instructions to name the template and identify its type. You may also further add/delete/modify the plan before saving it. When you are done, click the **Submit Button** to review the plan. When you are satisfied with the template, click the **Save** button to store the plan in the template library. From then on, users who create new project space may choose from the template library the saved plan template as their project plan.

View Project Profile

When you are sitting in the repository of a project space (the View Project Plan Page), there is a sub-menu item on top of the page called **Project Profile**. Click that and you will see the general information of the project space such as the coordinator, the project team, the type of the project and others.

Update Project Profile

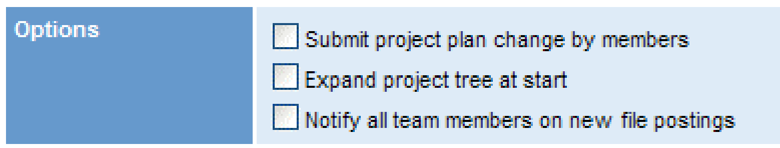
Project Coordinator, Project Manager and Admin are authorized to update the project profile. When you are viewing the project profile, if you are authorized to update this project profile, there is a link on the top right-hand corner called

Update Project Profile. Click on that link and follow the instruction to update the project profile. You may transfer the project coordinator responsibility to other team members here.

Update Project Options

One of the things you can update in the project profile is the project option. There are three project options available. Simply check marks the checkbox next to the option to select it. These options include:

- Submit project plan change by members
- Expand project tree at start
- Notify all team members on new file postings

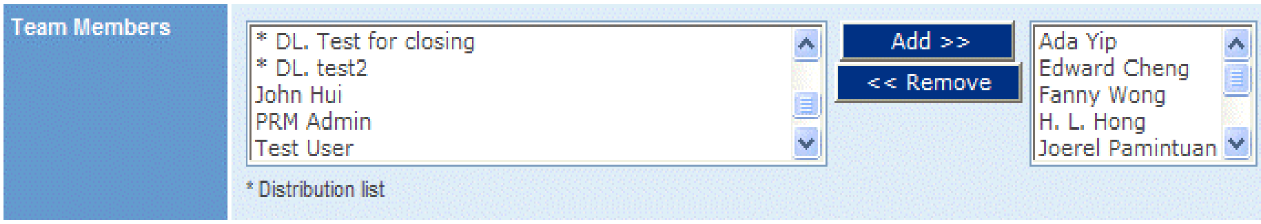


View Project Team

The project team members are listed on the right in the **View Project Profile Page**.

Add / Delete Members From a Project Team

To add or delete members from the project team, simply go to the project space and Update Project Profile. Follow the instruction on the page to change the project team.



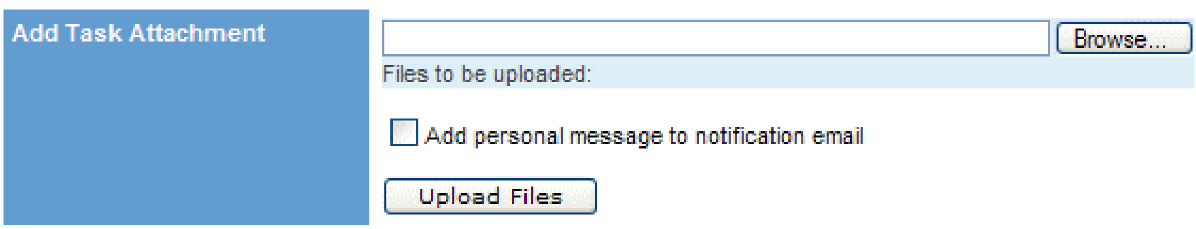
Task Management and Task Update

Tasks are sub-nodes within a project plan tree. The project coordinator and task owner are authorized to update the task. To perform task management and update, simply click on the corresponding task name on the Project Plan Page.

Note that all team members are authorized to upload files to a task, but only PC and the task owner are authorized to delete files in the task.

Uploading File Attachment to Task

To upload a file into CR, you upload it to a particular task. Go to the Task Management Page to upload the files. Note that you can browse and select multiple files before clicking the **Upload File Button**.

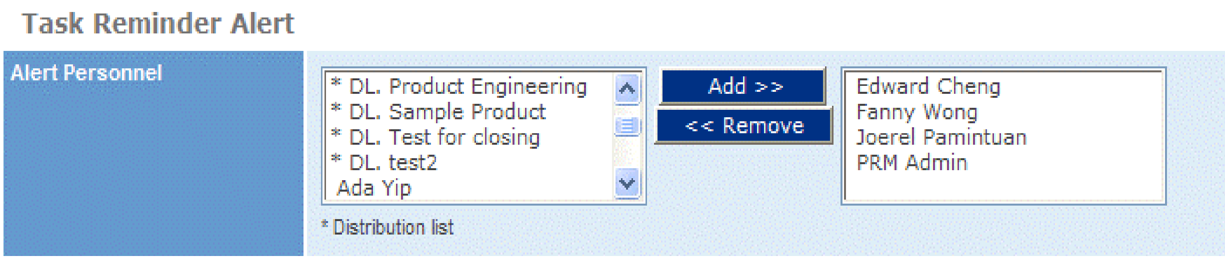


When uploading a file to a task area, make sure the **Department** is selected correctly to reflect the desired file type (department type) of the uploaded file. This controls the document authorization in CR. To see more about the CR Document Authorization Model, please review the chapter on CR Document Authorization Model in this document.

Task Alert Personnel

When uploading file to a task, if the task has specified a list of users in the **Task Reminder Alert Personnel** list, then these users will receive an email notification.

The Project Coordinator, Program Manager and Task Owner are authorized to add/delete from the Task Reminder Alert Personnel of the task.



File Attachment

The purpose of CR is to store and organize data files from company operations. This includes files from the finance department, engineering, marketing, sales, customer supports, services, internal operations, IT, human resources and others. These documents are classified into their corresponding departmental types. Note that the file types do not have to match exactly the departmental infrastructure of the company. However, it is a common practice to use company departments as a guideline when you decide what file classes or types you want to include in the company.

Users can add, delete, open or search for a file that is stored in CR.

Add a File to CR

Files are added to the sub-tasks of a project space. Team members of a project space are allowed to add files to the tasks. To do that, click into a project space and then click on the name of a task in which you desire to upload files. This will put you in the **Task Management Page**. Follow the instruction in the page to upload multiple files.

CR 2.0 supports versioning. When a user upload a file for the first time, the file will be of version 1, the name of the file will be appended with the version number:

- AP_3543 Design Spec(1).PDF

Note the numeric in parenthesis, (1), is added to the filename because of versioning. When users upload another file of the same name, “AP_3543 Design Spec”, to CR, the filename of the newly uploaded file will be:

- AP_3543 Design Spec(2).PDF

Email Notification on File Upload

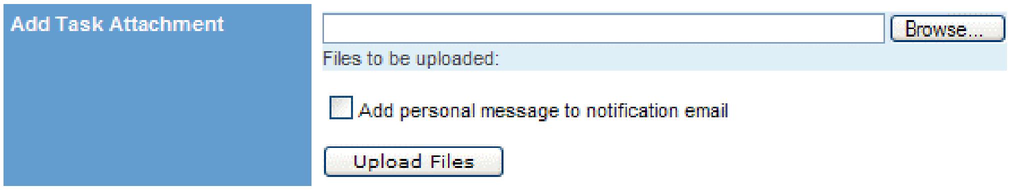
A notification email will be sent to users in one of the two cases:

1. The project option of *sending email notification to project team members* is turned on.
2. There is a list of alert personnel being specified in the task in which file is being uploaded.

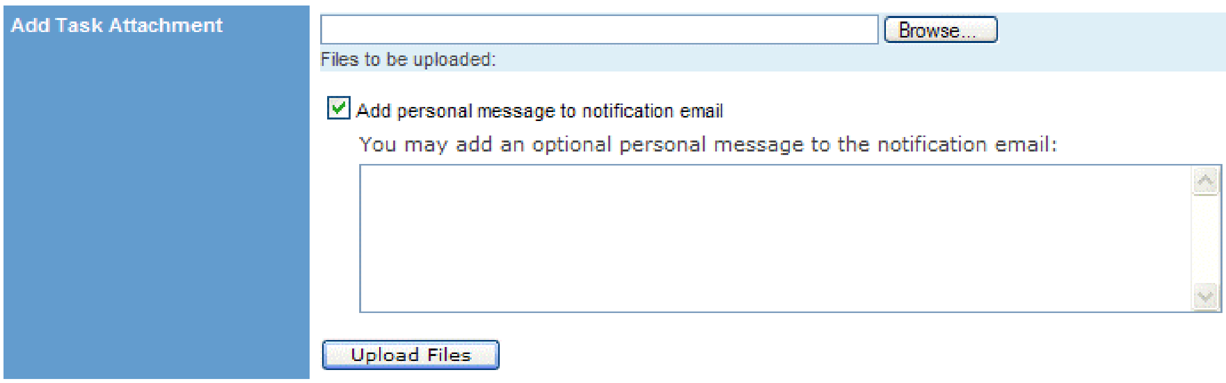
In the first case, the email will be sent when files are uploaded to any of the tasks within the project, and the mail is sent to the team members. In the latter case, email is only sent on a per-task basis. And the recipients are specified in the corresponding task.

Refer to the corresponding sections about details on setting project options and on updating task alert personnel.

When uploading file, if CR detected that email is to be sent, an option will appear near the file upload area.



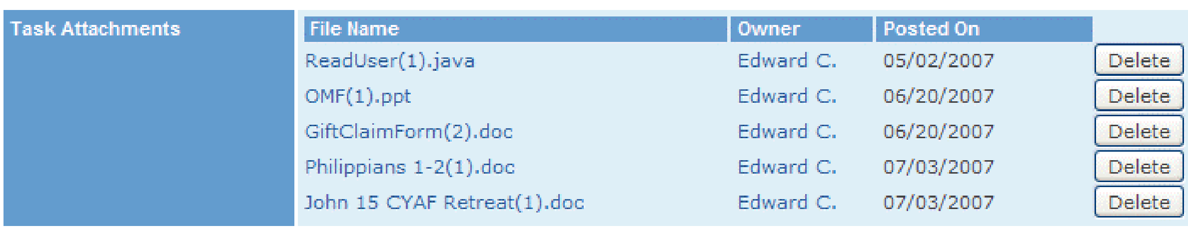
Check the “Add personal message to notification email” option will allow you to type a text message to be included in the email notification.



The email notification will be sent out automatically when you click **Upload Files Button** to finish the upload.

Delete a File from CR

You have to be the Project Coordinator, Program Manager or Task Owner to delete a file. Note that even the file owner (the person who uploaded the file into a task) is not authorized to delete the file once the file is submitted to CR. A **Delete Button** will appear after the filename in the **Task Management Page** if the user is authorized to delete the file.



Task Attachments

File Name	Owner	Posted On	
ReadUser(1).java	Edward C.	05/02/2007	Delete
OMF(1).ppt	Edward C.	06/20/2007	Delete
GiftClaimForm(2).doc	Edward C.	06/20/2007	Delete
Philippians 1-2(1).doc	Edward C.	07/03/2007	Delete
John 15 CYAF Retreat(1).doc	Edward C.	07/03/2007	Delete

Open a File

To open a file for read, simply click on the filename. The file would usually open up in the Web browser. You may also right click on the filename and choose **Save Target** and save the file onto your local disk drive.

Search for a File

There is a search icon on top of most of the pages in CR. You may type a keyword in the search box and press Return to perform a search.

Alternatively, you may click the magnify glasses icon next to the search box to open up the **Advanced Search Page** to specify a more detailed search query. For detail syntax of the search query, refer to the chapter on Search Engine in this document.

Change Document Type of a File Attachment

For security reason, the document type of a file attachment <u>is not allowed to be changed</u>. To move a document of a certain document type to another, only users who are authorized to access the document may download the file and then upload it again and specify the desired document type.

Search Engine

When you approach the Central Repository, if you know which file you are looking for, you will probably find the file by going to the project space and opening the task where the file is located. But what if you don't know exactly what you are looking for? The Search Engine can help you in this case to narrow the files you are looking for.

CR 2.0 has an advanced corporate Search Engine (SE) to search for relevant files for the user. SE is continually doing background work to organize the data and extract search index information to enable a rapid location of relevant information. This indexing algorithm is essential for SE to perform search over hundreds of thousands of files for users and satisfy their requests within seconds. The way it works is very similar to how a library is providing an index for patrons to locate the desired books they are looking for. However, the indexing system of SE is more advanced and intelligent when compared to the library index. Instead of only supporting search by Title or Author, with SE you can search by content, by date of upload, by project, or based on who had accessed the files.

Submit a Search Query

There is a search box on the top right-hand corner of most of the pages in CR.

To submit a simply search query, type a keyword in the box and press Enter. The search result will return to you on the next page. You may then click on the filename to access any of the files.

If the configurable option AUTO_WILDCARD is chosen in the CR configuration, then the wildcard character (*) will be added to the beginning and end of the single keyword you type. And whenever there is a wildcard in the beginning of the search clause, the search will only cover filename search. Without the AUTO_WILDCARD option, wildcard will not be added automatically around the search keyword and the search will cover both content search and filename search.

Note that the AUTO_WILDCARD option only takes effect when a single keyword is entered. For multiple keywords, this option has no effect. You can also turn off AUTO_WILDCARD by surrounding the keyword with double-quotes, e.g. "workflow" – note the use of double-quote (") around the keyword.

Search Syntax

You specify a search by entering one or more keywords.

- **Single Keyword Search**

You may enter a single keyword in the search box. E.g.

workflow

The search engine will return all documents that have the word "workflow" in the document content or in their filename.

You may add wildcard character (*) at the beginning or the end or both of the keyword:

workflow*

In this case, all files that contain "workflow" or "workflows" or "workflowXYZ" will return. In other words, as long as the file content or filename contains a string beginning with the characters "workflow" will return.

Note that if you begin a search clause with a wildcard character, only filename will be searched.

*workflow

In this case, only files with filename containing the string beginning with "workflow" will return. File content is not searched at all.

- **Multiple Keywords Search**

  You may enter multiple keywords separated by spaces. E.g.

  test workflow

  In this case, files that contain either one of these two words will return. When multiple keywords are specified, SE will return when any keyword is matched. However, the files that contain most keywords matched will be on top of the return list.

- **Phrase Search**

  To search for files that have an exact match of a phrase (multiple keywords), simply surround the phrase with double-quote ("). E.g.

  "workflow server"

  Note the double-quote surrounding the two keywords. In this case, only files that contain the two words "workflow server" in the exact order, either in the filename or the file content, will return.

Advance Search

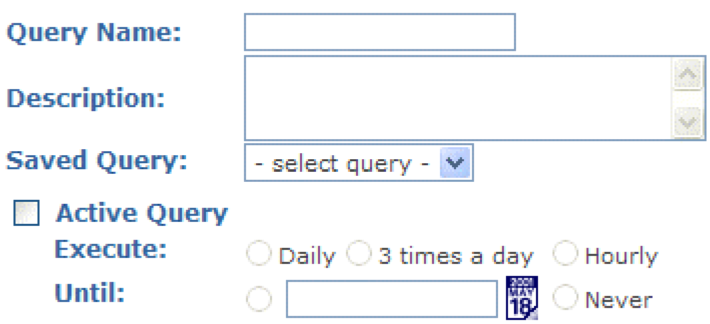
To use the advanced search feature, click the magnify glass icon on the left of the search box. Alternatively, when you are reviewing the search result, click on the link **Show Filter**, which is located right above the text box that contains the keywords. The advanced search filter will open up for you to specify detailed search conditions.

In advanced search, you may limit your search by project, date posted, posted by (owner of the file) and by accessed by (specify the person who had accessed the files).

Active Search Query

CR 2.0 supports a continuous lived search query called Active Search Query. Once you specify an active query, it will continue to exist in the system until your specified end time. With the active query, CR will periodically search the repository for you based on the search criteria you specified. When new files are posted that satisfy your search criteria, CR will send you a notification email and provide to you links to the latest found files. Active search query enables users to create continuous query to serve them in the background.

To specify an active search query, fill out the information on the **Advanced Search Page**.

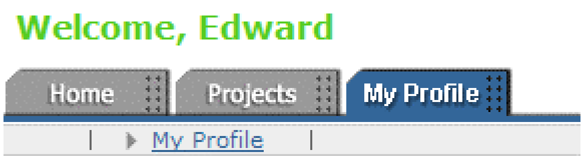


To create a new active query, first specify the search criteria on the Advanced Search Page. This may include information such as *keywords*, *project*, *date posted*, *owner*, and *accessed by*. You have to provide a name for this active search query, optionally also provide a description of what you are search for; the description is for your future reference only. Then check the checkbox to indicate this is an active query, and specify the execution frequency and the stop date for this long-lived query. After that, click the Save button under the keywords textbox bar. The newly created active query will be saved in CR and it will be run every so often as specified previously.

You may also edit a previously saved active query by selecting it in the **Saved Query** selection box. Make sure to save the change after you are done.

User Profile Management

A user in CR has a login ID, password and email address. The user profile contains other information such as his/her role, authorized departmental file type, first name, last name, telephone number and others depending on the specific CR configuration and customization.



Add a New User

To add a new user, simply go to the index page of CR and click on the New User link located on the upper right-hand corner. Follow the instruction on the page to fill out the necessary information. The Department Name indicates the authorized file type for this user. The Project List specifies the projects this user is to be a team member of. You must provide Email, First Name and Last Name for the new user. Optionally you may also specify who is the manager of this new user. Click the **Submit Button** when you are done.

If the NEW_USER_AUTO_APPROVAL option is selected in the CR configuration, then the new user registration request will be approved automatically and immediately by CR. Otherwise the email address specified in the CR configuration (under the key FROM) will receive a notification email. Upon clicking the link in this email, the delegated person may approve or reject the new user request.

Forgot Password

If a user forgot his/her CR password, s/he may reset and retrieve a temporary password by clicking on the **Forget Password** link located on the upper right-hand corner of the CR index page. The user may provide either his email (must be the one s/he used in his/her CR user profile) or his/her CR login ID to retrieve password. The information will be sent to his/her email account.

Show User Profile

After the user login to CR, s/he may click the **My Profile Tab** on the menu bar, which is located near the top of the Home Page. The **User Profile Page** will be shown. If s/he has subordinates that are reporting to him/her, their information will also be shown on the page.

Update User Profile

A user may update his/her user profile by clicking on the link **Update User Profile** that is located on the upper right-hand corner of the User Profile Page. Follow the instruction to update user profile information such as first name, last name, email address and others.

Change User Password

To change user password, go into the **Update User Profile Page** and provide your old password and new password. Then click the **Submit Button** to submit the change.

Change User Roles

Only the CR Site Administrator can update user roles for users. Please contact your CR Admin if you need additional user roles.

For Admin, simply login as Admin, and then click the **My Profile Tab**, which will display all the users on the page. Click on the person that you want to change his/her role, when that user's User Profile Page appears, click on the link to Update User Profile. As an Admin, you will be able to update the user's roles.

Grant / Revoke User Authority on File Accesses

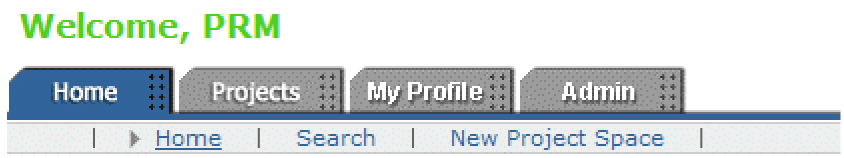
Only the CR Site Administrator may grant or revoke users' authority on file accesses. Please contact your CR Admin if you need to change your file access authority.

For Admin, simply login as Admin, and then click the **My Profile Tab**, which will display all the users on the page. Click on the person that you want to change his/her role, when that user's **User Profile Page** appears, click on the link to **Update User Profile**. As an Admin, you will be able to add/remove from the user's Department list.

Administrator Functions

The Admin person in CR may perform certain administrator functions in addition to all of the functions that are described in this document.

When you login as Admin using the Admin ID and password, you will see an additional tab on top of the screen called Admin.



Click on the **Admin Tab** and you can perform the following administrative functions.

Add New User

The Admin's add new user process is very similar to New User registration process described in this document. However, regardless of whether the NEW_USER_AUTO_APPROVAL option is selected or not, Admin's new user request will be approved and processed immediately.

To add a new user, click the **Add New User** link on the **Admin Function Page**. Follow the instruction on the page to fill out the necessary information. The Department Name indicates the authorized file type for this user. The Project List specifies the projects this user is to be a team member of. You must provide Email, First Name and Last Name for the new user. Optionally you may also specify who the manager is of this new user. Click the **Submit Button** or the **Add More User Button** when you are done.

Delete User

Admin is the only person authorized to remove users from CR.

To delete a user, click the **Delete a User** link on the **Admin Function Page**. Type the user ID in the textbox and click the **Submit Button** to delete. If you don't know the user ID of the person, go to **My Profile Page** and see from the list of all users to find the right user ID to be deleted.

View User Activities

Admin may review users' login activities on the site. To review user activities, click the **View Users By Project** link on the **Admin Function Page**.

CR System Configuration

CR 2.0 is a highly configurable server software application. To change the CR system configuration, first request all users to logoff from CR, then shutdown the Application Server or the CR application. Refer to the Application Server User Manual about procedures to shutdown the Application Server.

The options are specified in the property file called pst.properties. This file is located in the properties.jar, which is placed in the library directory of the CR Web application. The following sections describe the different configurable parameters of CR 2.0.

Search Engine Configuration

Document Authorization Departments

The DEPARTMENTS key specifies the various departmental file types supported in the CR domain. The list is separated by semi-colons (;).

DEPARTMENTS = ENGINEERING; MARKETING; SALES; FINANCE

Index Network Drives

The SE_INDEX_DIRS key specifies the network drives that CR/SE is going to include in the repository. Note that you may optionally specify the file type of the files in a particular directory by appending "*@@Department_Name*" at the end of a drive specification. Again, the list is separated by semi-colons (;).

SE_INDEX_DIRS = S:/temp/engr@@ENGINEERING;
ftp://209.108.198.1/Product@@MKG; T:/biz@@MARKETING-SALES;
T:/general

Remove Unidentified Attachment Object

Users may add or delete files from the network drive if they are given the operating system privileges to do so. There is an option in CR that you can set to clean up the CR database when users have removed a previous file from the network drive. This helps to maintain a clean database for CR.

REMOVE_ATT_OBJ = true

Index File Location

CR constantly refresh the index of the repository in the background. The index is stored in a file. The SE_INDEX_PATH specifies the directory path in which the index file is located.

SE_INDEX_PATH = C:/temp/index

Allow Guest Search

To allow users to search for files without log in, set GUEST_SEARCH to true. Note that although guest users may perform search with this option, when s/he tries to open the file, access will be denied if s/he doesn't have the authority. In this case, a guest can only open files that do not have any file type.

GUEST_SEARCH = true

Automatically Insert Wildcard Character

When this option is turned on, CR will automatically insert wildcard character in the beginning and at the end of a single search keyword. Note that if the search keyword or clause has a space, asterisk (*), double-quote (") or semi-colon (;) in it, then this option key will have no effect.

AUTO_WILDCARD = true

User Registration Configuration

Automatic Approval on New User Registration

The NEW_USER_AUTO_APPROVAL key determines whether a new user request will be approved automatically by CR or a real person has to be involved in approving the request. If this key is set to true, CR will look into the pst.properties file (see above for the location of this file) and extract the email address that is specified in the FROM key. An email will be sent to this address to request for approval of the new user registration. An example of these key values is shown below.

FROM = john.smith@bigBurger.com

NEW_USER_AUTO_APPROVAL = false

Notification on New User Registration

Optionally, a number of managerial or administrative users might desire to receive an email notification when there is a new user registered. You may specify a list of email addresses to receive such a notification email.

SEND_ALERT_ON_NEW_USER = paul.eckert@yahoo.com; sam.hui@bigBurger.com; john.smith@bigBurger.com