



everis Big Content Portal - User guide

release 2019-05-09

Table of Contents

1. Introduction	1
1.1. Goals of this document	1
1.2. Target audience	1
2. What is the Big Content Front-end?	2
3. BC Portal structure	3
3.1. Header functionalities	5
3.1.1. Toggle menu section	5
3.1.2. Resize menu view	6
3.1.3. Document-Store selection	6
3.1.4. Select Language	6
3.1.5. User information	7
Advanced user information	7
User Log-out	8
3.2. Lateral Menu	9
3.3. Central view	9
4. BC Portal User Roles	10
4.1. Understating the Role access	11
4.1.1. ROLE_RW (generic user)	11
4.1.2. ROLE_ADMIN (Administrator user)	11
5. BC Portal Sections	13
5.1. Desktop View	13
5.1.1. Manage documents	13
Download document	13
Document online viewer	14
Delete document	14
Share document	15
5.1.2. Common actions of documents	16
5.1.3. Document/File online viewer	17
PDF file Viewer	18
Image file Viewer	18
Video file Viewer	19
Unknown file Viewer	20
5.1.4. Document search	21
Basic Search	21
Advanced Search	22

Search by General Metadata.....	22
Search by Category.....	23
Search by Content.....	24
5.2. Document detail view.....	25
5.2.1. Document details view elements	25
5.2.2. Create new version	26
5.2.3. Change the current version.....	26
5.2.4. Category Assignment	28
5.3. Audit trails view	29
5.4. Upload document view.....	30
5.5. Audit management View	31
5.5.1. Configure Audit trails:	32
5.6. Category management View	33
5.6.1. Create a new Category	33
Category name.....	34
Create attributes.....	34
Special type 'list options'	35
Create category	36
Confirm category creation.....	37
5.6.2. Edit Category	38
5.6.3. Delete category.....	38

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.

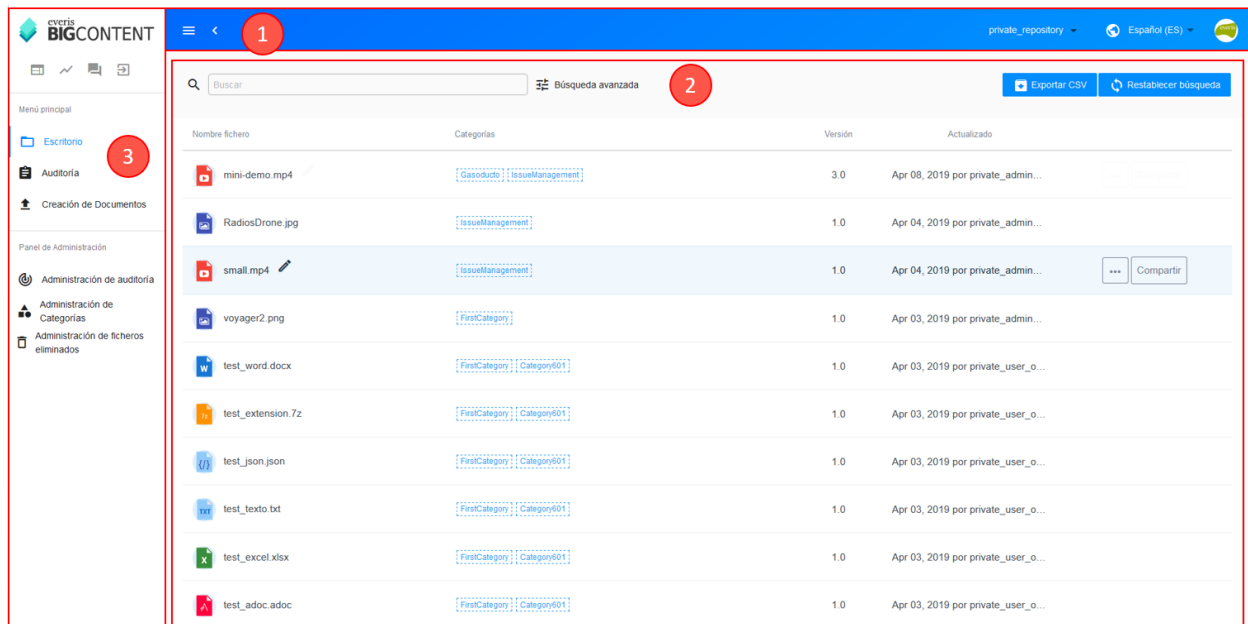
The main functionalities which can be carried out from BC Portal are:

- 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](#)

- [Category Assignment](#)
- Category Assigned Edition
- Category Assigned Removal
- [Versioning](#)
- Select the current version
- Logical Document delete
- Logical Version delete
- [Audit Event search](#)
- [Document creation](#)
- [Audit Management](#)
- [Categories Management](#)
- **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](#)

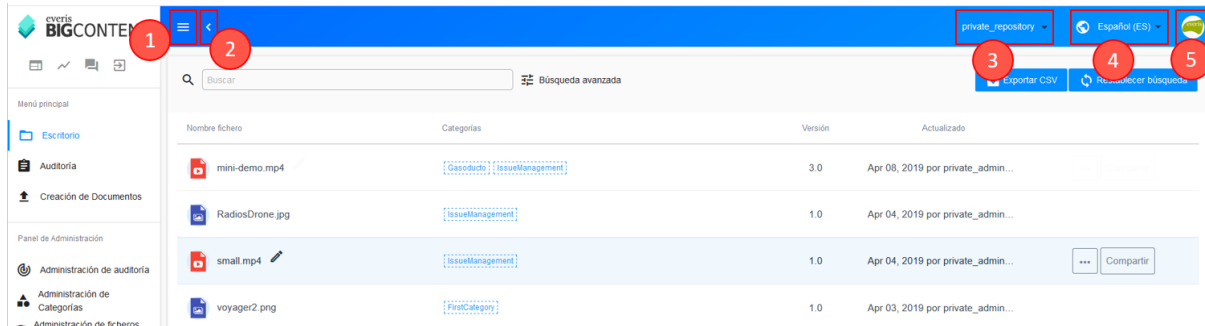
From the lateral menu, it is possible to access other BigContent external resources:

- 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.

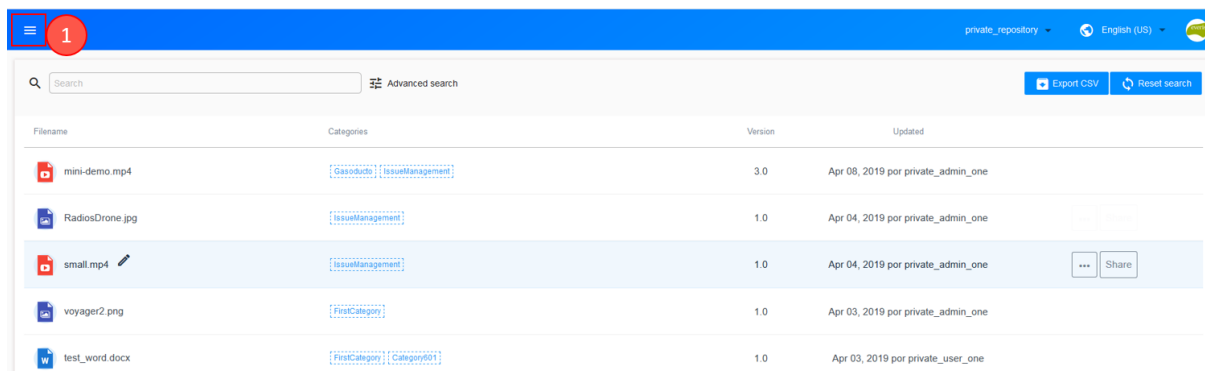
The main functions of the header are described below:



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

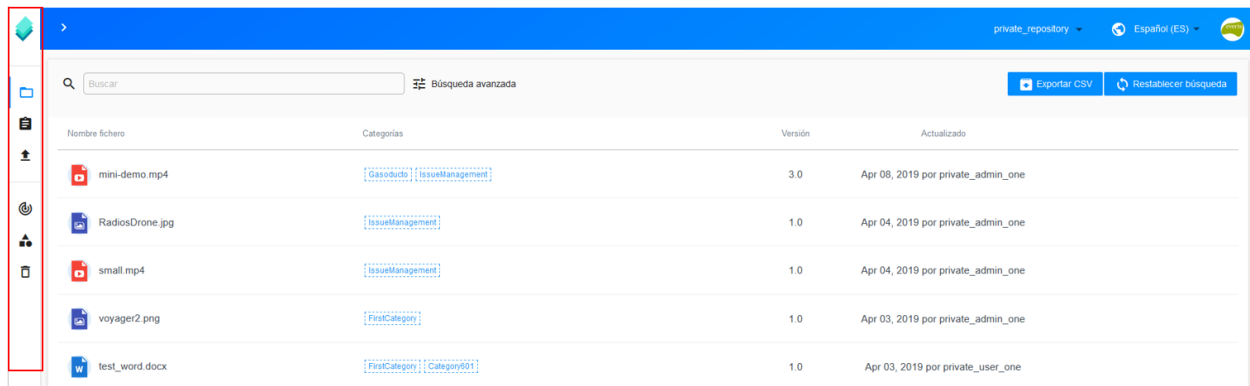
The users can show/hide completely the lateral menu view.



- (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.

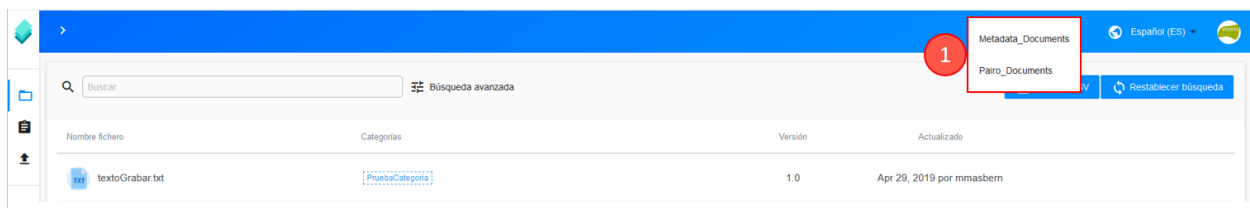


- (2) This button collapse the lateral menu view and provide more space in central view.

3.1.3. Document-Store selection

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

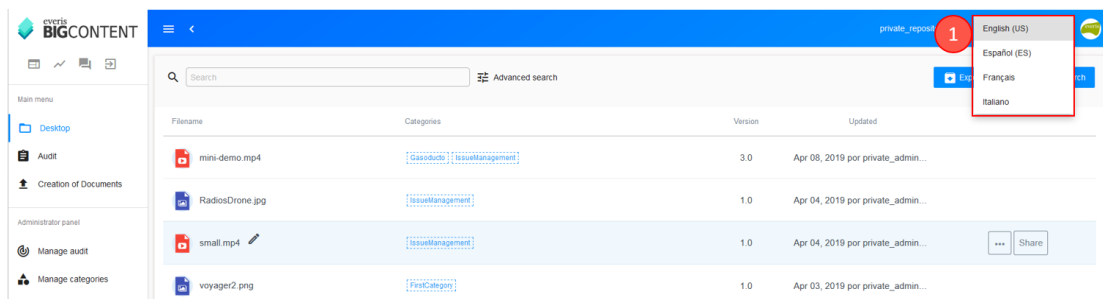
The list shows the repositories to which the user has access.



- 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

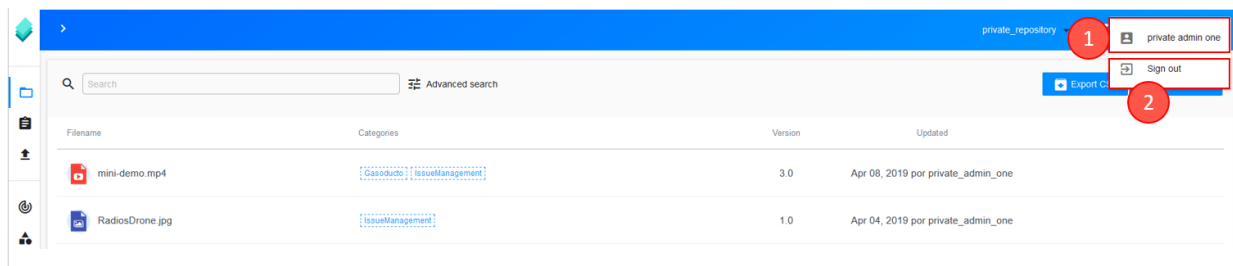
The users can select the BC Portal language choosing between: English, Español, Français, Italiano.



- 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

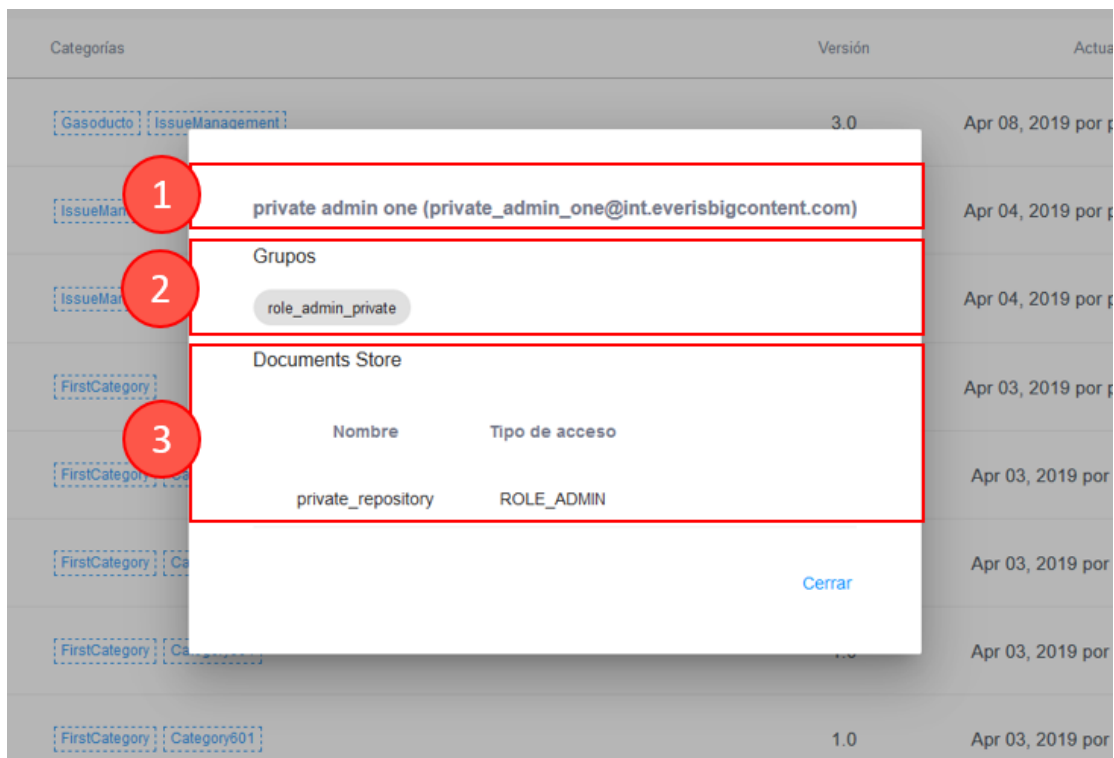
In this section any user can make two basic operations:



- (1) Show advanced user information (User profile).
- (2) Sign out application.

Advanced user information

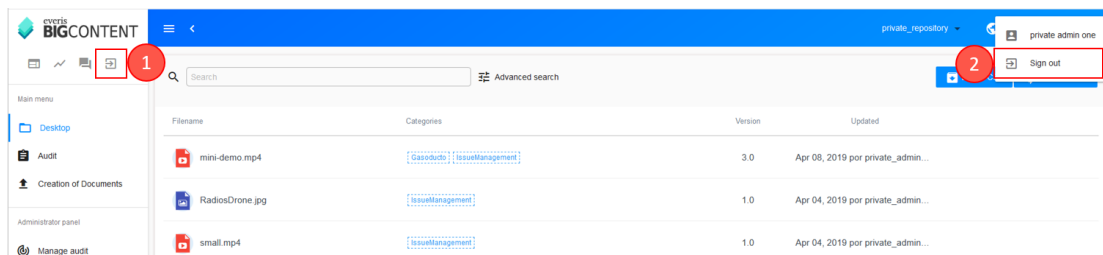
Internal information from user, domains and document store is shown.



- (1) Username and log in user.
- (2) List of groups.
- (3) Document Store and access role type information.

User Log-out

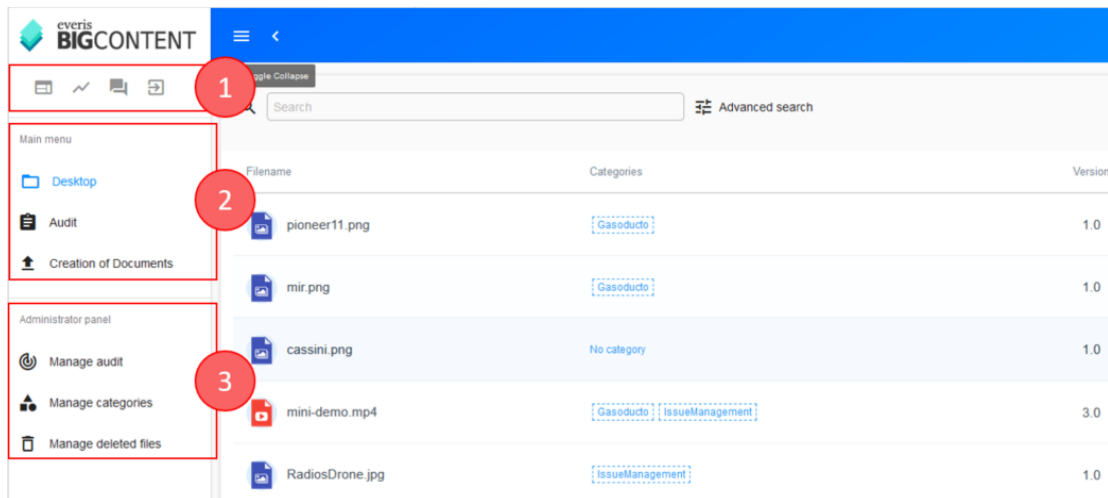
The users can leave the BC Portal from two different points in the application:



- (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

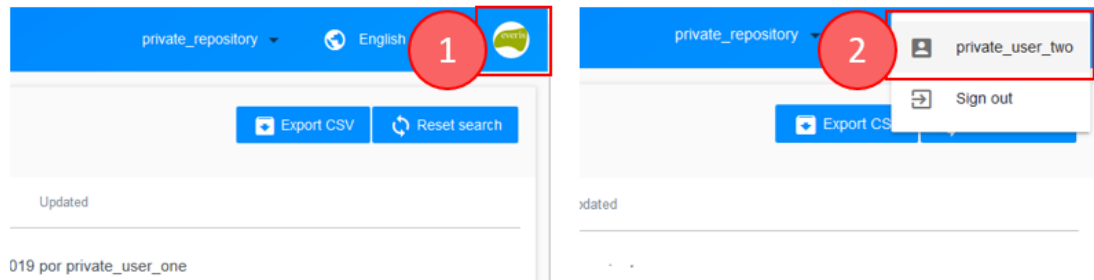
The central view is a container where the rest of the functionality screens are loaded.

By default, 'desktop' section with repository documents list is shown.

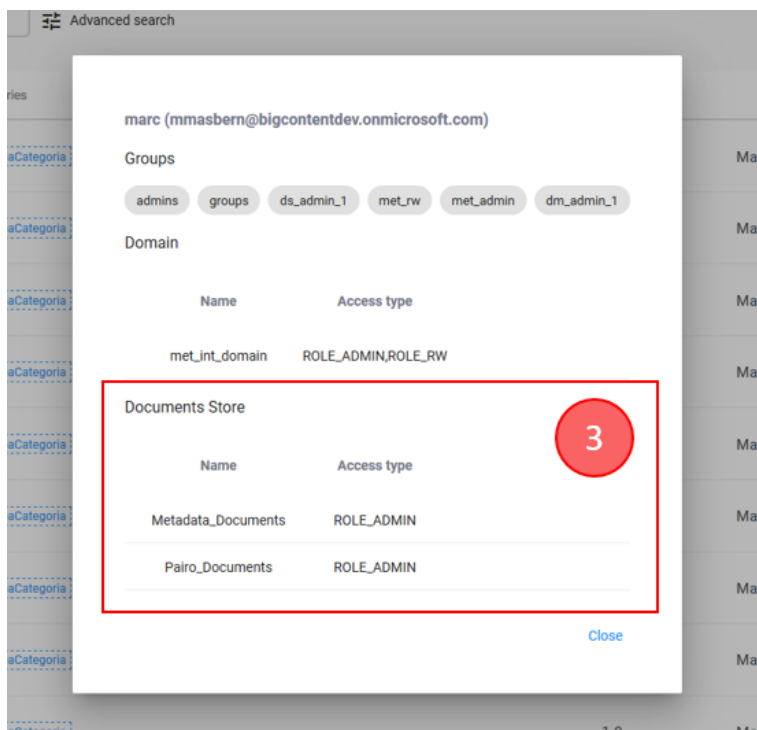
Chapter 4. BC Portal User Roles

There are two types of roles within the application: **ROLE_RW** and **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.

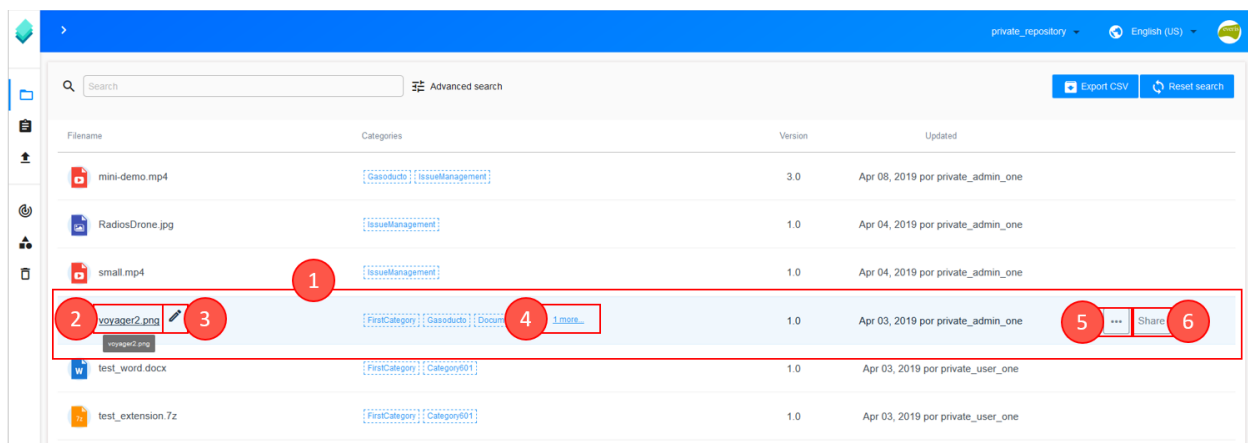
Chapter 5. BC Portal Sections

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

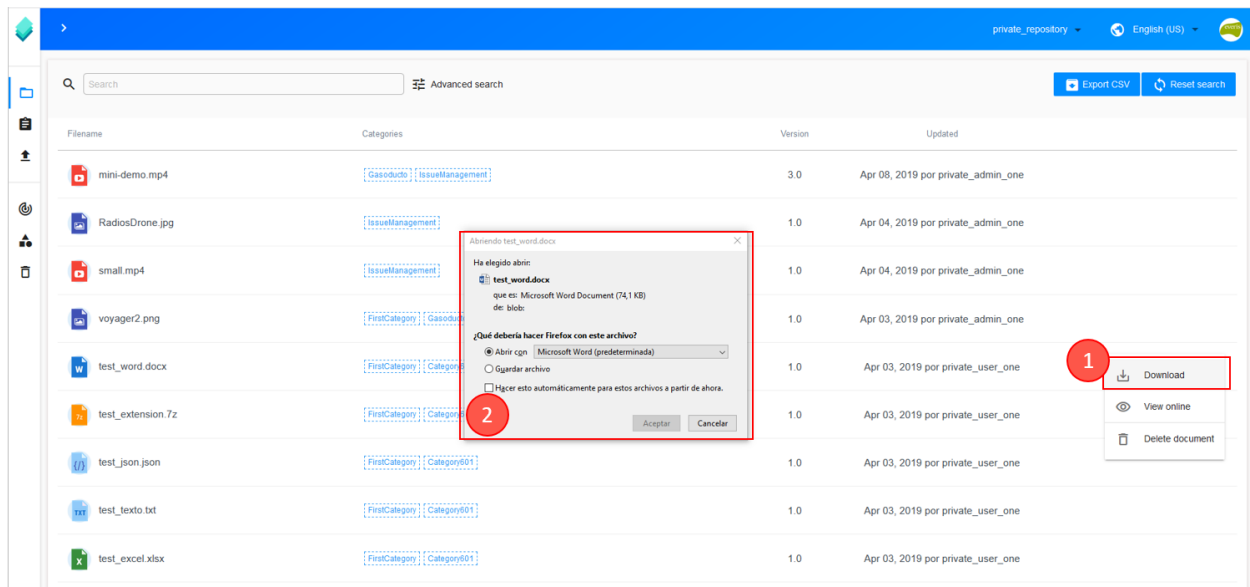
Big Content application provide a different actions to manage documents.



- (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.

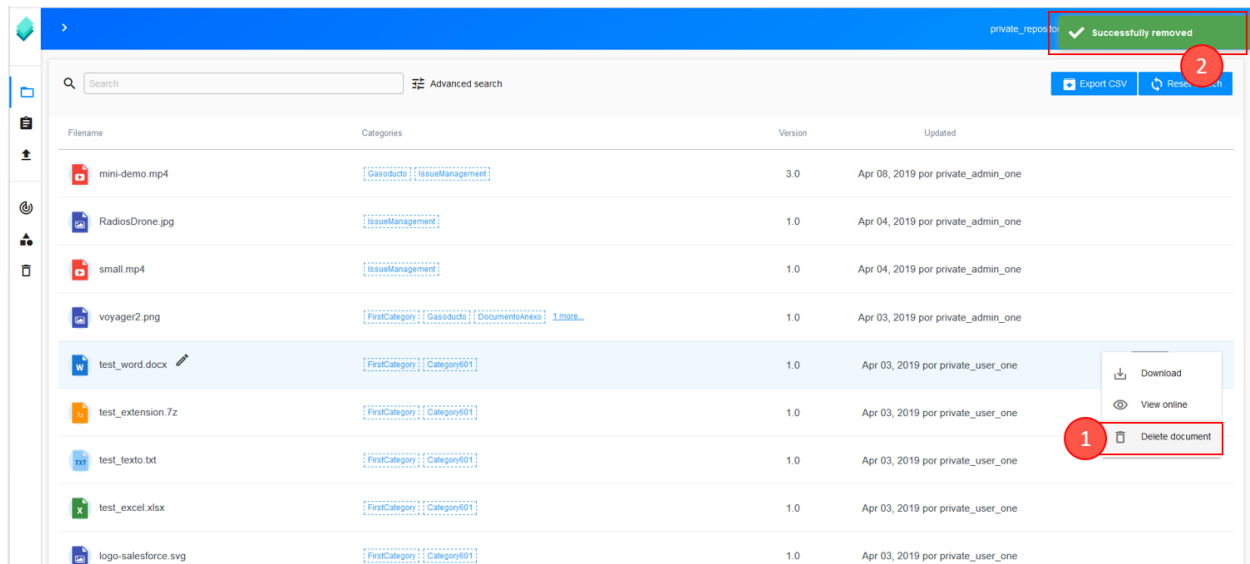


Delete document

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](#)

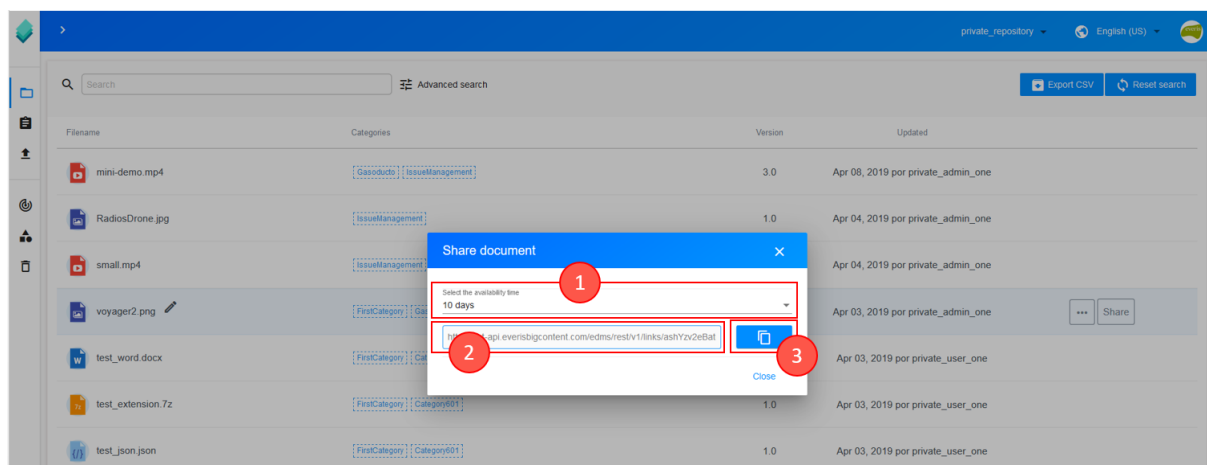


- (1) Contextual menu, delete document button
- (2) Show message

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

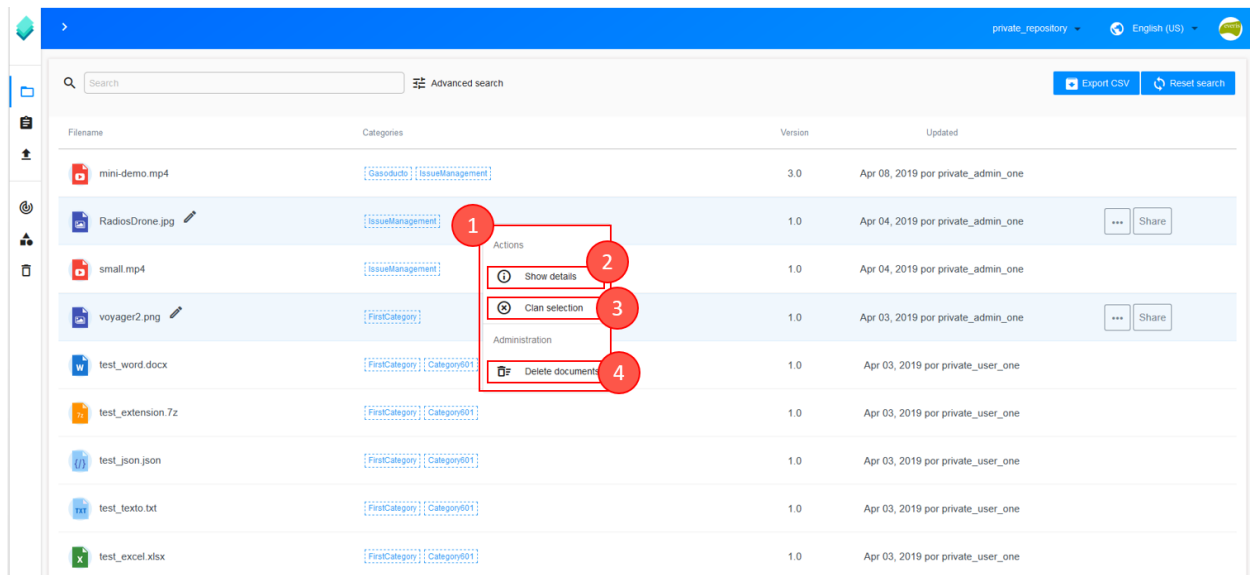


By default, the generated link is valid for 10 days.

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.

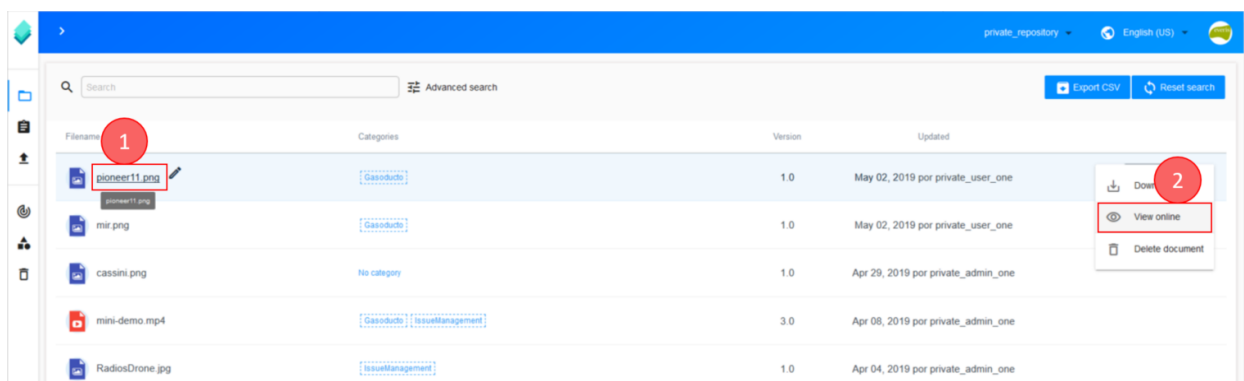
5.1.3. Document/File online viewer

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

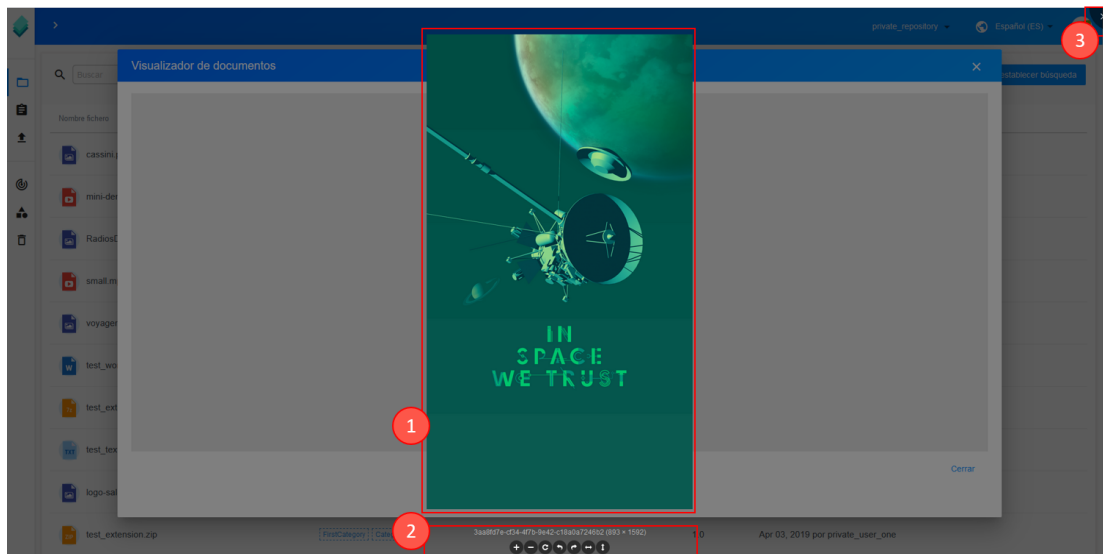
The application use the browser embedded pdf plugin into browser.



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

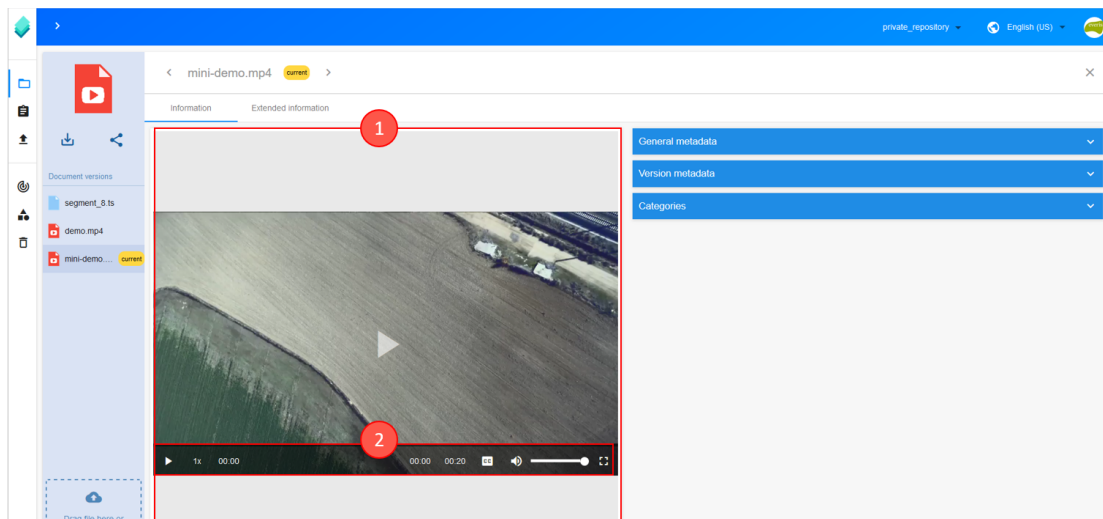
The application includes a complete image viewer with some options.



- (1) Image viewer.
- (2) Image controllers.
- (3) Close button or click out of image.

Video file Viewer

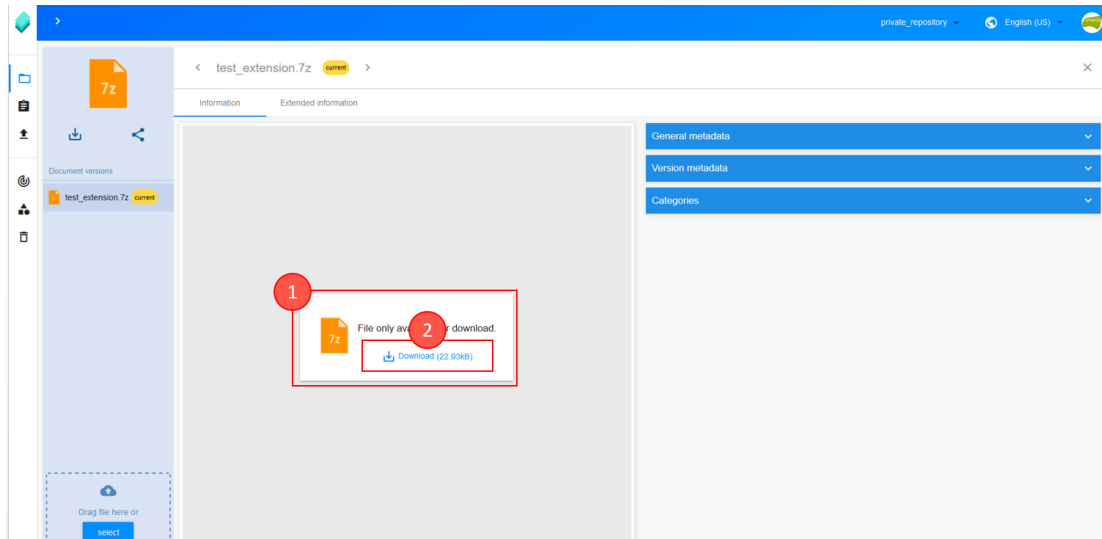
The application provide a video viewer.



- (1) Video viewer and container.
- (2) Video controls.

Unknown file Viewer

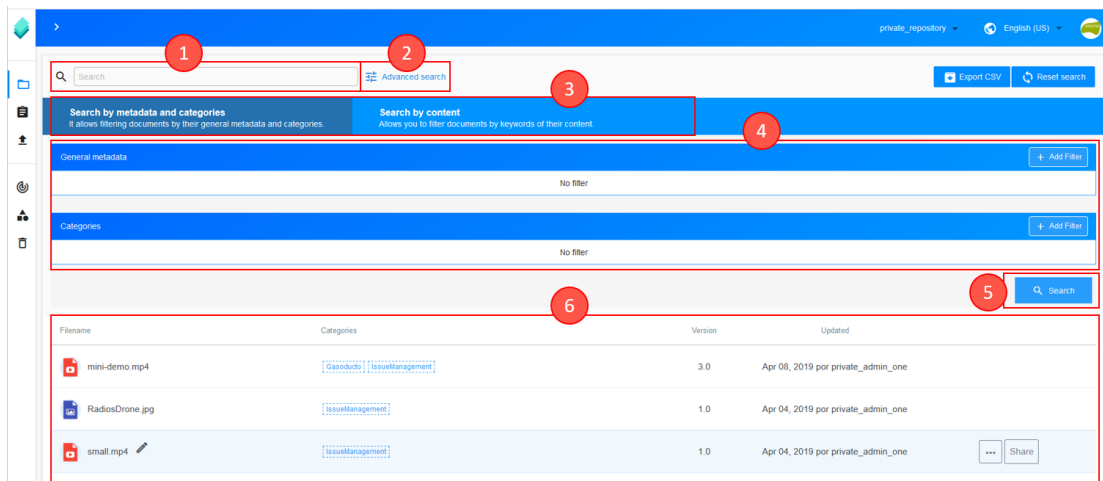
For unknown document type, the viewer allows to download the file:



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

5.1.4. Document search

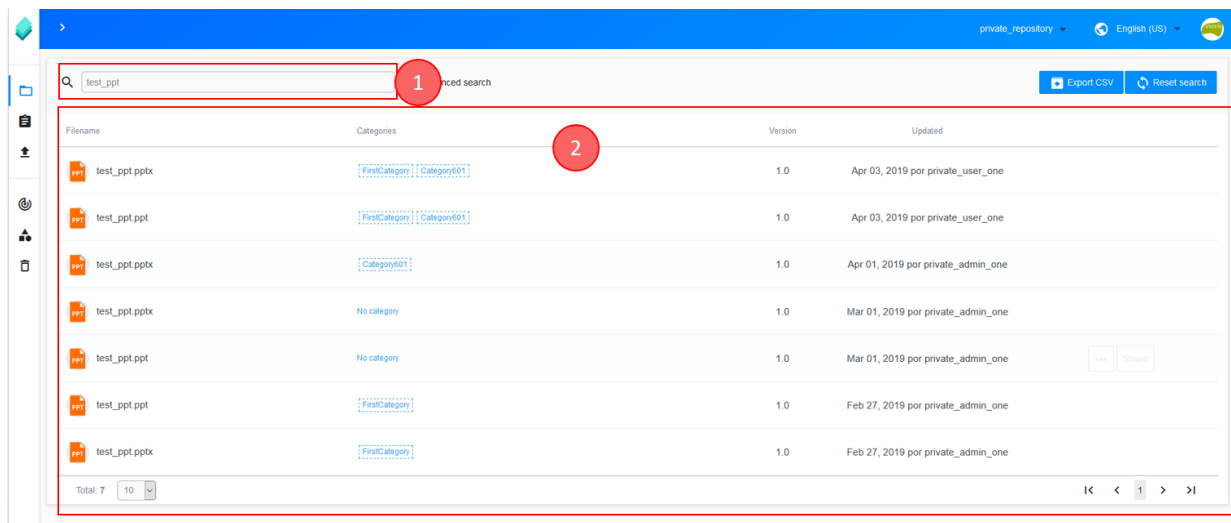
Search options are available in 'Desktop View':



- (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.

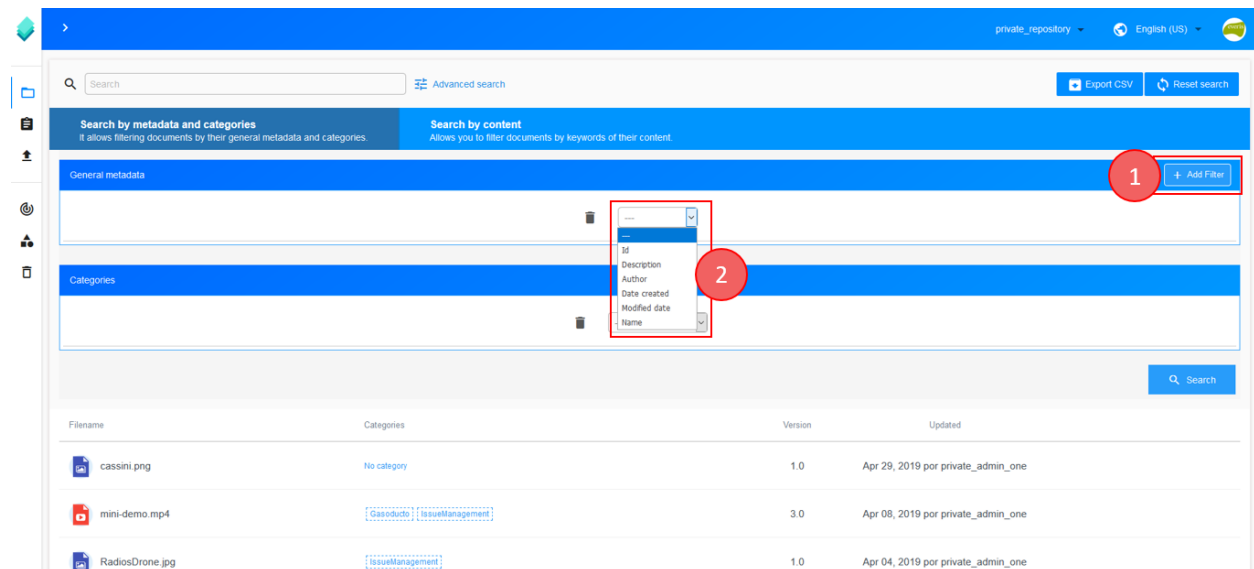
Search by General Metadata

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:

Field	Detail	Observations
Id	A unique ID auto generated that identifies the document	The advanced searcher allows the client to search by complete id or part of it.

Field	Detail	Observations
Name	Filename provided at the creation of the document	The advanced searcher allows the client to search by complete name of the file or part of it.
Creation Date	Date when the document was uploaded	The advanced searcher allows the client to search by complete name of the author or part of it.
Author	User account that uploaded the content to BigContent	The advanced searcher allows the client to search by complete name of the author or part of it.
Modification Date	Date when the document metadata was modified	The advanced searcher allows the client to search by Modification Date range
Description	A description provided by the author of the document at the creation of it	The advanced searcher allows the client to search by complete description or part of it.



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.

The screenshot shows the 'Search by content' section of the BC Portal. A red box highlights the search filters, and three red circles with numbers 1, 2, and 3 point to specific elements: 1 points to the 'CompleteCategory' dropdown, 2 points to the 'Text_Attribute' filter, and 3 points to the 'Numeric_Attribute' filter.

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.

The screenshot shows the 'Search by content' section of the BC Portal. A red box highlights the search filters, and three red circles with numbers 1, 2, and 3 point to specific elements: 1 points to the 'Content of the current version' dropdown, 2 points to the 'Content of the current version' search box, and 3 points to the 'Search' button.

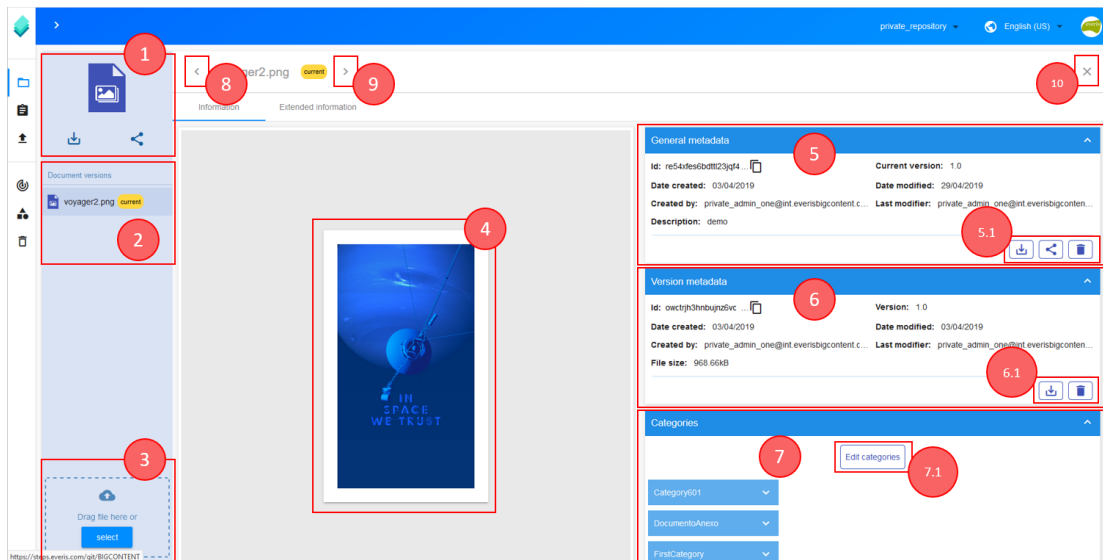
Filename	Categories	Version	Updated
cassini.png	No category	1.0	Apr 29, 2019 por private_admin_one
mini-demo.mp4	Gasoducto ; IssueManagement	3.0	Apr 08, 2019 por private_admin_one

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

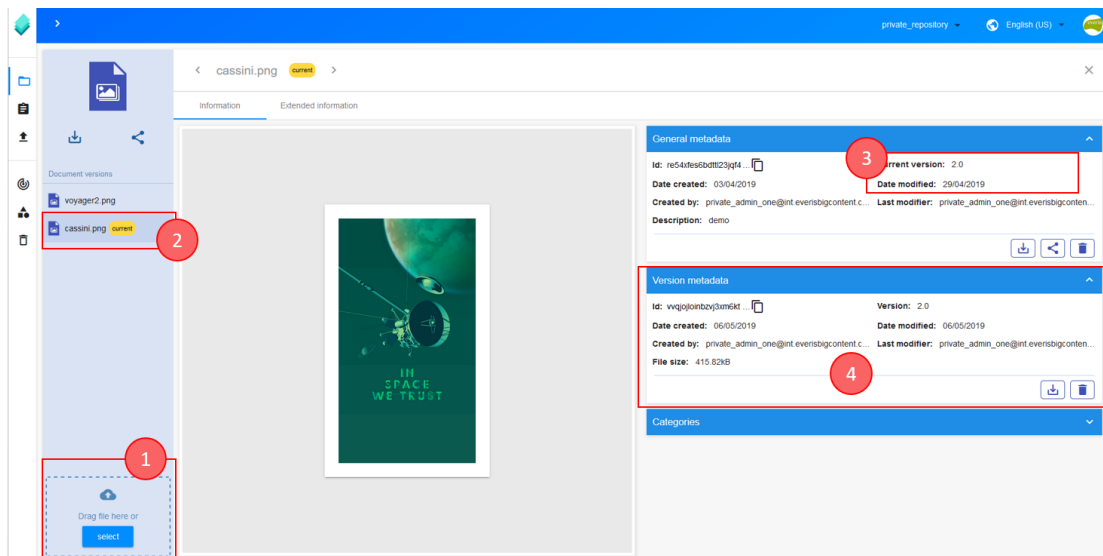


- (1) Icon and rapid actions to current version
- (2) List of version of document
- (3) Button to upload a new version of document
- (4) Document viewer
- (5) Dialog to show information about the current version
 - (5.1) Actions on current document
 - Download version
 - Create a share link
 - Delete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

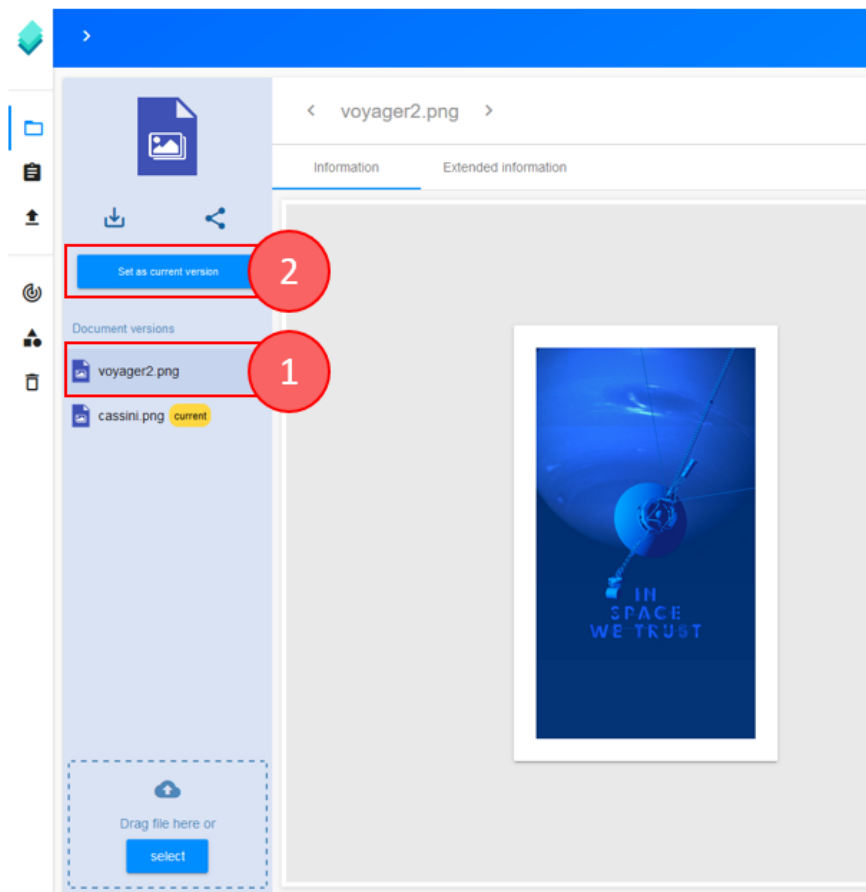


- (1) Click 'select' button to upload a new document from your computer.
- (2) 'New document version' it is marked as to 'current' version and show in the lateral menu with a yellow mark.
- (3) In the general information box, the current version, date.. and other information are updated.
- (4) This new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

5.2.3. Change the current version

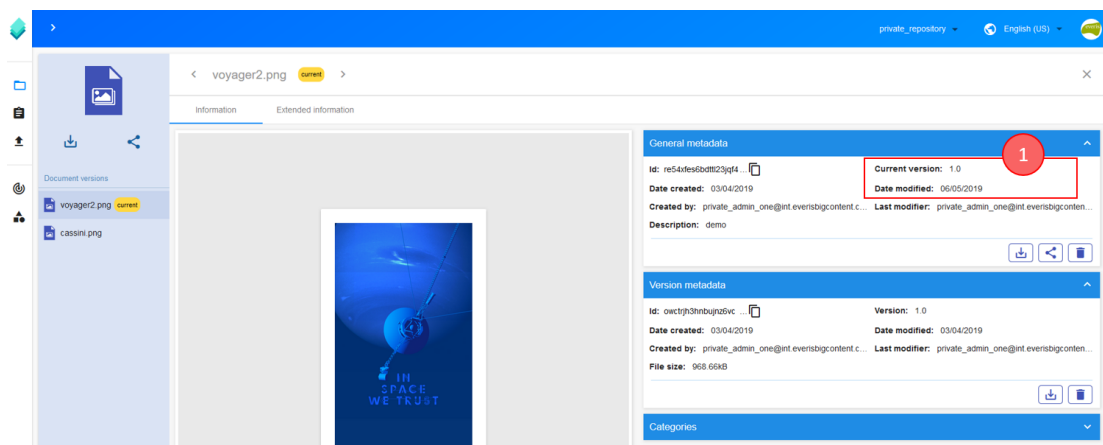
To change the current version of a document, just navigate to the desired version and click on the

option 'set as current version'



- (1) Select a version of document
- (2) Click in 'Set a current version'

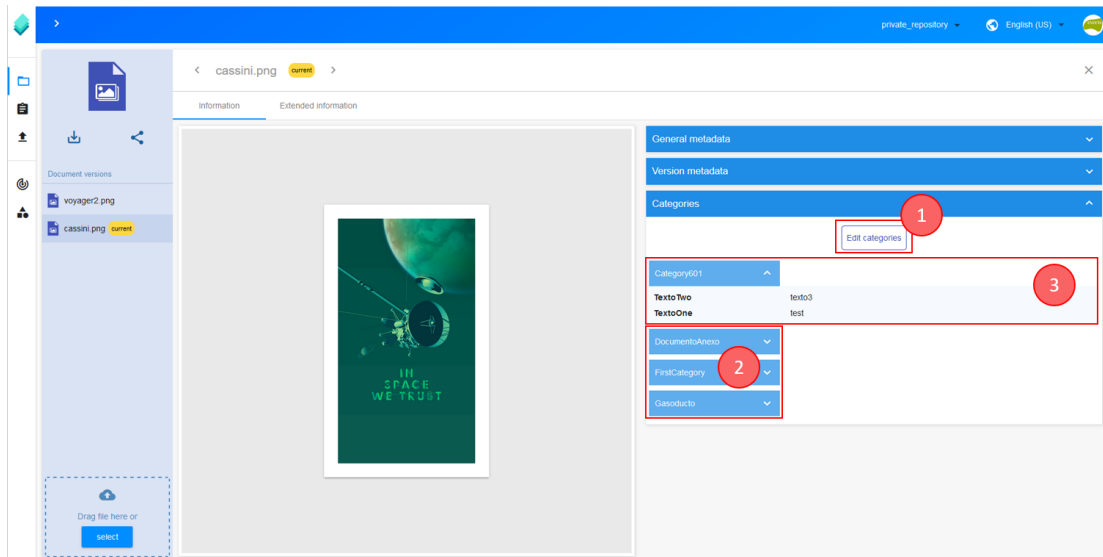
On general metadata box, current version 1.0 is shown.



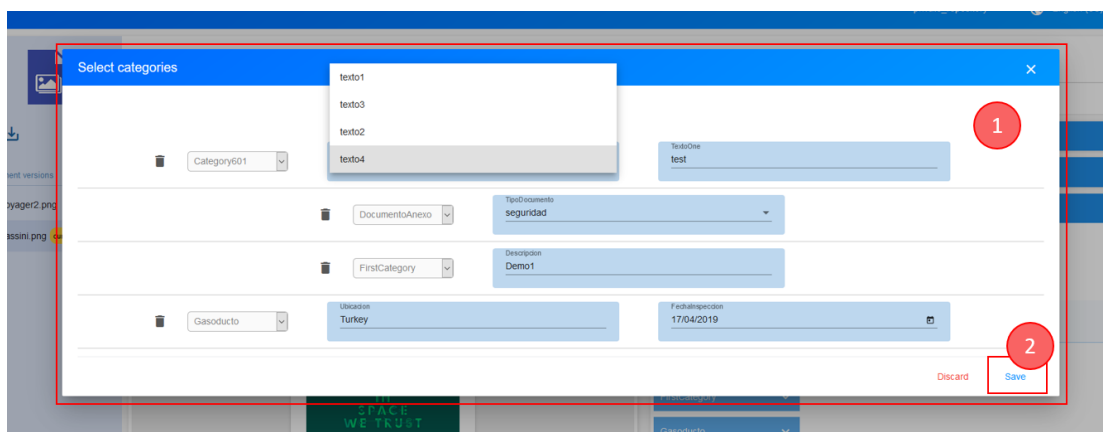
5.2.4. Category Assignment

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:

The screenshot shows the 'Advanced event search engine' interface. It includes a sidebar with navigation icons, a main search area with filters, and a results table. Red circles with numbers 1 through 7 highlight specific features: 1. Document store selection dropdown. 2. Date and time search filters. 3. Event type selection checkboxes. 4. Number of results dropdown. 5. Search button. 6. Object ID in the results table. 7. Extended information link in the results table.

Event	Object Id	Span Id	Date	User	Extended information
SEARCH	6	52c90f4b-22b9-4b54-a72d-df	03/05/2019 14:50:42	private_admin_one@int.everisbigcontent.c	7
SEARCH		4682c0b3-28c3-4ee8-a46e-ft	03/05/2019 12:45:09	private_admin_one@int.everisbigcontent.c	
SEARCH		eb918e7d-91a3-47d4-8da5-d	03/05/2019 12:45:04	private_admin_one@int.everisbigcontent.c	

- (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.

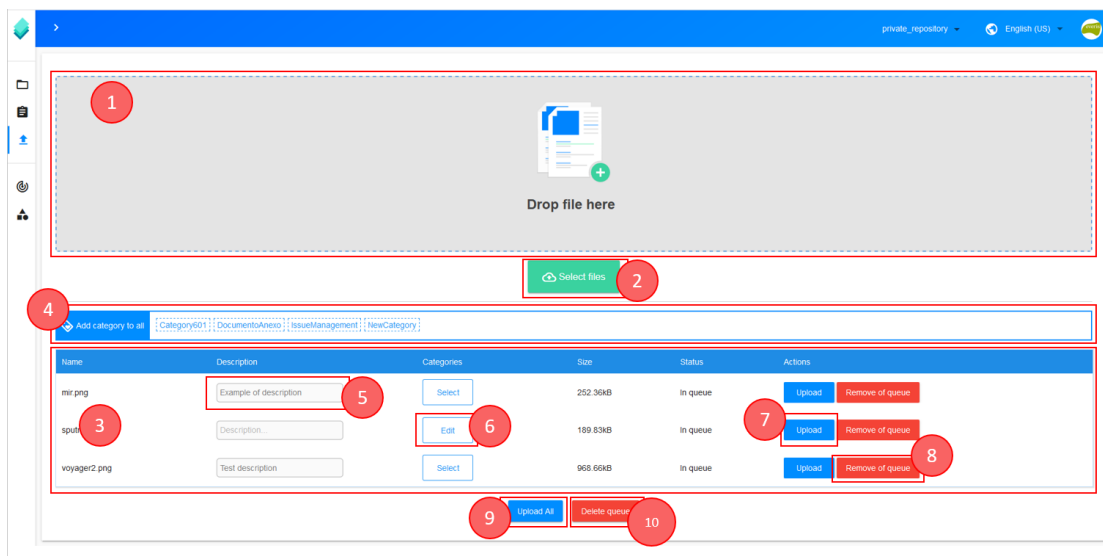
5.4. Upload document view

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-Store.

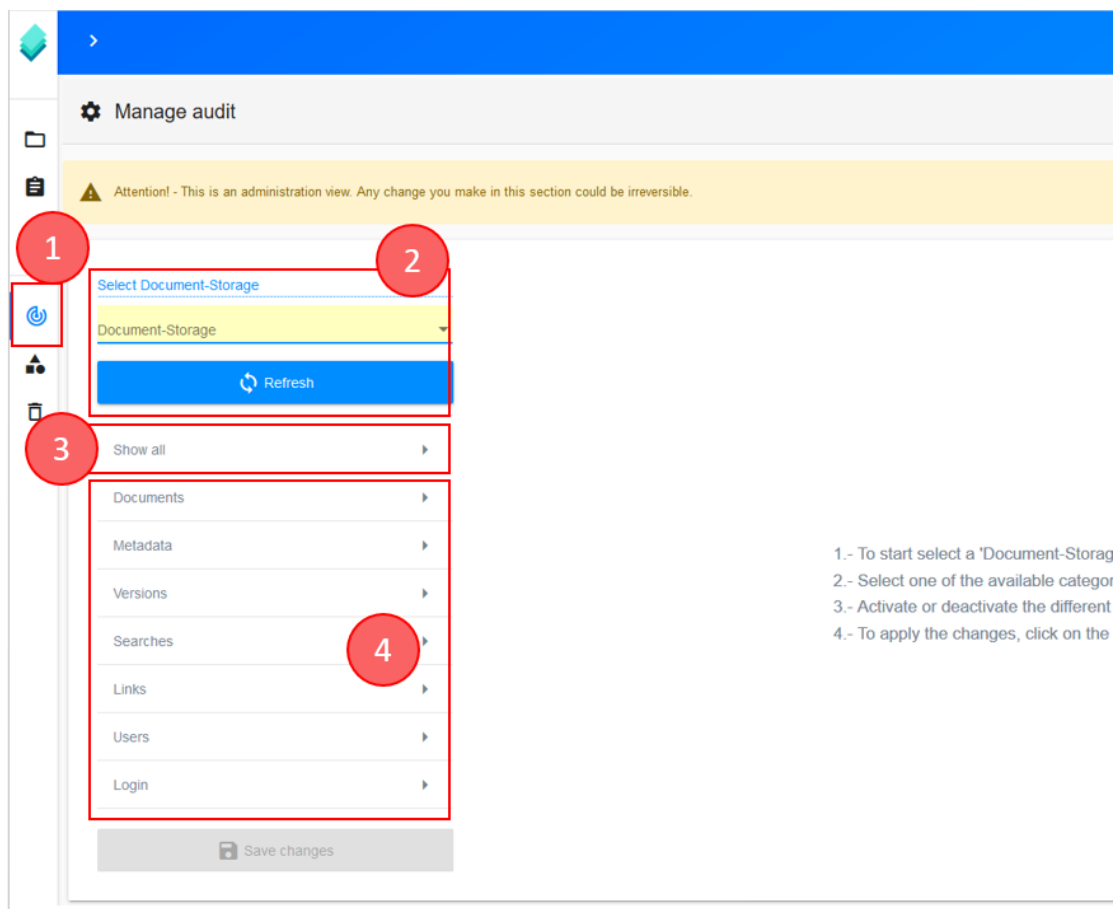
The user can configure the audit event, just selecting the desired event.

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:

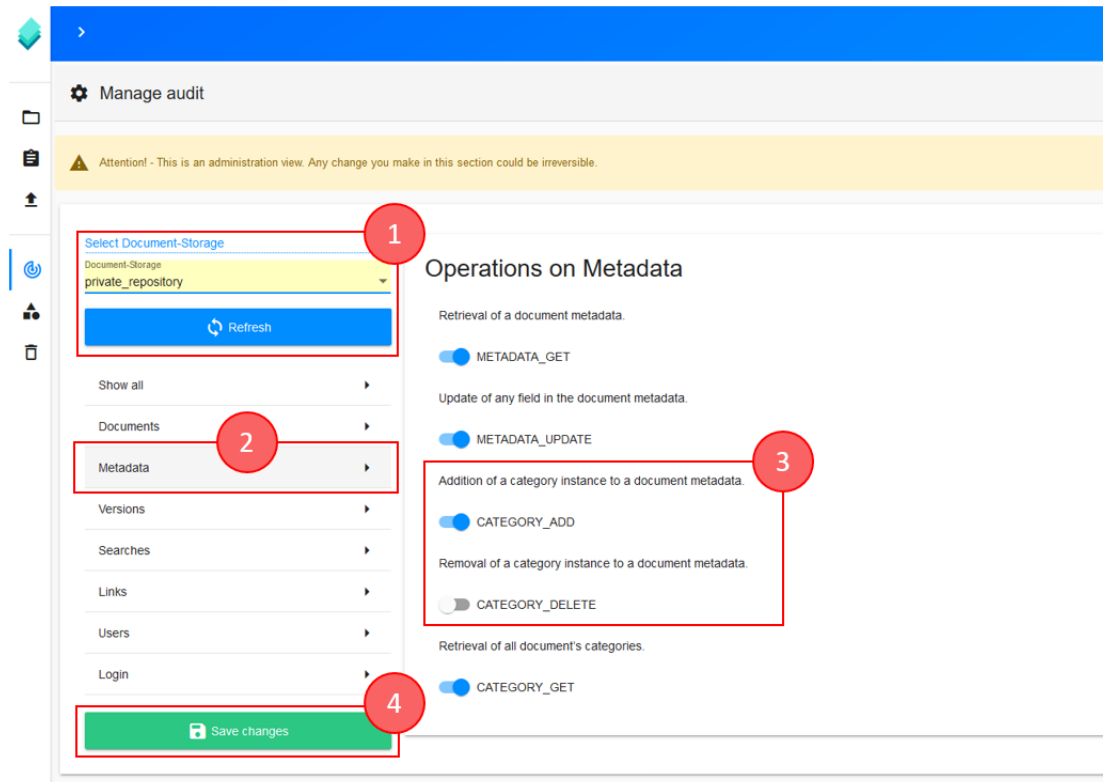


- (1) Access to Audit management view

- (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

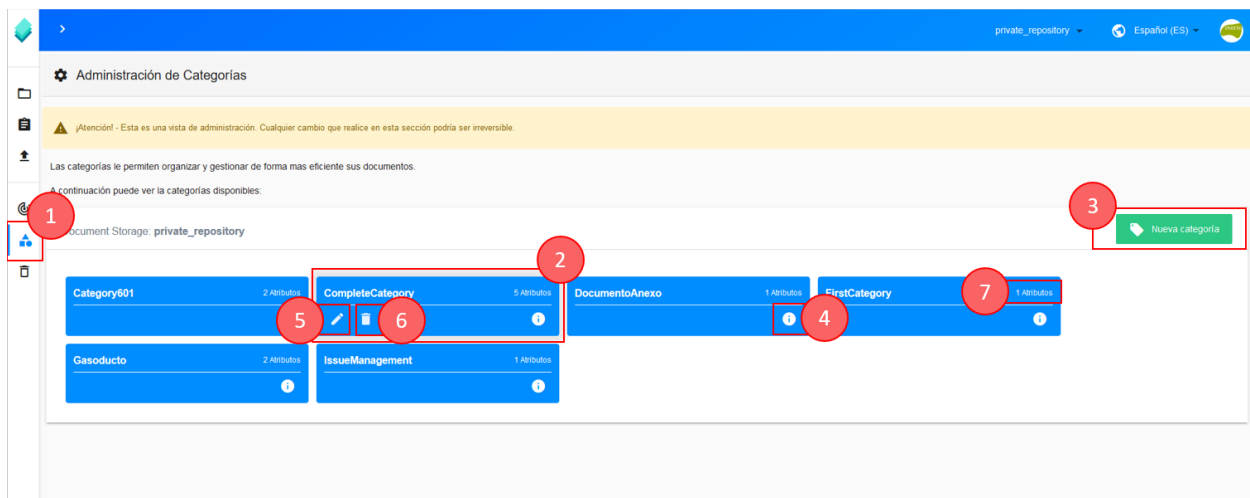
5.6. Category management View

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

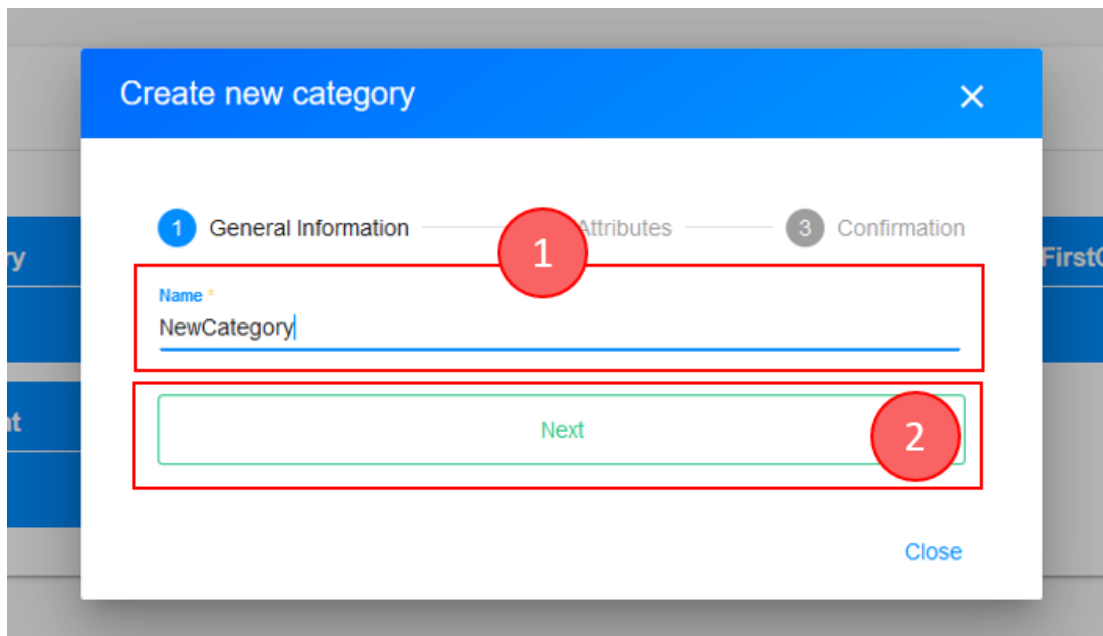
To create a new category, click on the green button 'new category' located on the right side of the

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.

ould be irreversible.

Category

ement

FirstCategory

Create new category

General Information — 2 Attributes — 3 Confirmation

Set attribute

1 Name *
Attribute-Numeric

2 Datatype
Numeric

3 ☐ Required attribute

4 Add attribute

5 Confirm attributes and continue

Close

- (1) Name of Attribute, the space and special characters are not permit.
- (2) Type o 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.

The screenshot shows a 'Create new category' dialog box with a blue header and a close button (X) in the top right corner. The dialog contains two main sections for creating attributes. The first section has a 'Datatype' dropdown set to 'Numeric', a checked 'Required attribute' checkbox, and a 'Set attribute' button with a trash icon. Below this is a 'Name *' field containing 'ListOfOptions', which is highlighted in yellow and marked with a red circle '1'. The second section has a 'Datatype' dropdown set to 'Text string', marked with a red circle '1'. Below it is a text area with the instruction '*Optional. Then you can add a list of allowed values.' and four buttons labeled 'Option1', 'Option2', 'Option3', and 'Option4', each with a close icon. This entire section is marked with a red circle '2'. At the bottom of the dialog are two buttons: 'Add attribute' and 'Confirm attributes and continue'. A 'Close' button is located at the bottom right of the dialog.

- (1) Type o 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).

Create new category

General Information — Attributes — 3 Confirmation

* Attention! By checking this box, the selected category will be created in all available Document-Store

☐ Create category in all repositories.

Save category

Close

- (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.

private_repository English (US)

Manage categories

Attention! - This is an administration view. Any change you make in this section could be irreversible.

The categories allow you to organize and manage your documents more efficiently.
Below you can see the available categories.

Document Storage: private_repository New category

NewCategory 2 Attributes 1	Category601 2 Attributes 1	CompleteCategory 5 Attributes 1	DocumentoAnexo 1 Attributes 1
FirstCategory 1 Attributes 1	Gasoducto 2 Attributes 1	IssueManagement 1 Attributes 1	

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.

