



Arco

Doma 6
Application administrator manual
10. Managed lists

A new era in document management.

Doma 6

Application administrator manual

10. Managed lists

Document reference: not assigned
Described Doma version: 6.5

Author: Arco Training Dept. - Kris Steenackers

Manual Modification Follow-Up

Ref.	Date	Author	Modification description
	11/05/2011	Kris Steenackers	Manual creation
	20/07/2012	Kris Steenackers	Global update of the manual

Contents

1	Introduction	6
1.1	What are managed lists? Definition of managed lists - use of managed lists.	6
1.2	Managed lists types	6
1.3	Why create a managed list?.....	6
1.4	Difference in configuration with other Doma properties	7
2	Configuration	8
2.1	Step 1: Configuration in the Doma admin module: Create a new Managed list	8
2.2	Step 2: Link the managed list to a property	9
2.2.1	Property parameters	10
2.3	Create managed list of the type LIST	11
2.3.1	Why create a managed list of this type?.....	11
2.3.2	Configuration in the Doma admin module	11
2.3.3	Edit list in WebInterface	12
2.3.4	Configuration of the list items in the web interface	13
2.3.5	Link the managed list to a property so it can be used in a category	13
2.4	Create a managed list of the type CODELIST	14
2.4.1	Configuration in the Doma admin module	14
2.4.2	Configuration of the list items in the web interface	14
2.4.3	Link the managed list to a property so it can be used in a category	15
2.5	Create a managed list of the type UDCLIST.....	16
2.5.1	Configuration in the Doma admin module	16
2.5.2	Configuration of the list items in the web interface	16
2.5.3	Link the managed list to a property so it can be used in a category	17
2.6	Create a managed list of the type THESAURUS.....	18
2.6.1	Definition and usage	18
2.6.2	Configuration in the Doma admin module	19
2.6.3	Configuration of the list items in the web interface	20
2.6.4	Link the managed list to a property so it can be used in a category	23
2.7	Create a managed list of the type CONCEPT TREE.....	25
2.7.1	Configuration in the Doma admin module	25
2.7.2	Configuration of the list items in the web interface	25
2.7.3	Link the managed list to a property so it can be used in a category	26
2.8	Edit a managed list.....	27
2.9	Delete a managed list	27
2.10	Export a managed list.....	28

1 Introduction

1.1 What are managed lists? Definition of managed lists - use of managed lists.

*Managed lists are DocRoom properties, more specifically list properties of which the content can be managed from the DocRoom web interface.
Basic configuration of the list is done in the Doma admin module. The management of the values is done in the web interface.*

1.2 Managed lists types

We can distinguish the next types of managed lists:

Item	Description
List	Plain list. The user sees a pre-defined list of values; the values appear in the language defined in the user's profile.
Codelist	Plain list. The user sees a pre-defined (alfa) numeric code and a value linked to this code in a list. It is possible to search on this code, so language barriers can be avoided.
UDC list	Structured list that contains (alfa)numeric codes in different levels, linked to a description. The user can select a pre-defined code out of a selection list that is presented as a tree structure.
Thesaurus	<p>A thesaurus is a lists of words grouped together according to similarity of meaning. The user can select a word for which relations (synonyms, translations, broader terms, narrower terms) are defined in the thesaurus. This allows users not only to search on that particular word, but also on the related words. For each word in a thesaurus, you can define a:</p> <ul style="list-style-type: none"> • <i>narrow term</i>: more specific word, defining a sub-class of your word, e.g. a narrow term of traffic is car. • <i>synonym</i>: word with the same meaning, e.g. a synonym of the word invoice is bill. • <i>translation</i>: word in another language, e.g. car is auto in Dutch, voiture in french. • <i>related term</i>: the word has some kind of relationship with the original word, e.g. wafels are related to Brussels. <p><i>Remark: not all of the thesaurus functionalities are available in the current version of DocRoom.</i></p>
Concepttree	The combination of all precedent types: all concepts are presented in a tree structure which contains a code and an explanation of the code. Each word can also have synonyms etc.

1.3 Why create a managed list?

- To administer a managed list, you don't need to have application administrator rights. Normal users or key user can thus administer one or more managed lists directly from the web interface.
- You can define translations for the words in your managed list. This means different language can be supported.

1.4 Difference in configuration with other Doma properties

To define and use a managed list property, you have to do the next steps:

1. Define a managed list in the Doma admin module or via the admin part of the webinterface.
2. Define a property of the type MNGDLIST in the Doma admin module and link this property to the managed list.
3. Link this property to a category.

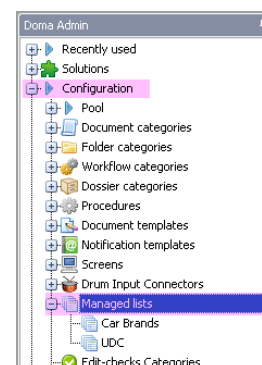
2 Configuration

Basic configuration of a managed list is possible in the Doma admin module, but administration of the list content is always done in the Doma WebInterface.

New managed lists can be created from the Doma admin module or from the admin part in the Doma Webinterface.

2.1 Step 1: Configuration in the Doma admin module: Create a new Managed list

- Open the Doma admin module.
- Select the item Managed lists in the Configuration part of the navigation tree.
- Click on the right mouse button. A menu pops up.
- Select the option New.




- A configuration screen appears at the right of the navigation tree.

Field name	Description
Name	Name of the managed list.
Type	Dropdown list that shows the different managed list types: list, codelist, UDClst, thesaurus and concepttree.
Multi Lingual	<p><i>All lists can be made multi-lingual. According to the language profile of the user, the list values will be shown in the corresponding language when the translation is available.</i></p> <p><input checked="" type="checkbox"/> The list is multi lingual. Synonyms can be added in the selected languages. When this option is enabled, the checkboxes E (English), N (Dutch), F (French) and G(German) can be selected. Select the languages you want to use.</p> <p><input type="checkbox"/> The list is mono lingual.</p>

Use synonyms	<p><i>It is also possible to define synonyms for list items. Users can then select an item on its initial value or on its synonym.</i></p> <p><input checked="" type="checkbox"/> Synonyms can be added for the lemata. <input type="checkbox"/> No synonyms can be added for the lemata.</p>
Category Dependant	<p><i>List items can be made category dependant. I.e. they will only be shown when the managed list is used for that particular category.</i></p> <p><input checked="" type="checkbox"/> The managed list is only available for a number of pre-defined Doma categories. For which categories it will be available is defined in the Doma WebInterface. <input type="checkbox"/> The managed list is available for all Doma categories.</p>
Allow new	<p><i>Users can add new list items if allowed by the list administrator. Depending on configuration, this can be with or without validation.</i></p> <p> <input checked="" type="radio"/> Not allowed: Users are not allowed to add new items to the managed list. (Only administrators can do this.) <input checked="" type="radio"/> Without validation: Users are allowed to add new items to the managed list. The new items are immediately added to the list without validation. <input checked="" type="radio"/> With validation: Users are allowed to add new items to the managed list. Before they are really added to the list, they have to be validated. </p>
Linked list	<p>Dropdown list that contains the other managed list. HIAAT</p>
Status	<p> <input checked="" type="radio"/> In production: The list is in production and thus available for the users. <input checked="" type="radio"/> Disabled: The list is not available for the users. </p>







Click on the button  in the ribbon above the configuration screen to edit the list items in the WebInterface.

2.2 Step 2: Link the managed list to a property

To be able to use a managed list, it has to be linked to a Doma property of the type **Managed List**.

- Open the Doma admin module.
- Open the item pool properties or the category detail where you want to add the Managed list to.
- Create a new property.
- Enter the **name** of the property in the field **Name**.
- Select the **type**: **ManagedList**.
- **Select** an existing managed list in the **dropdown box Managed list** at the bottom of the configuration screen.

2.2.1 Property parameters

Field name	Description
Default value	<i>Value that is shown by default in the field in the Doma web interface.</i>
Auto Complete	Contains: the system will automatically select the unique value that contains the text entered in the search box or list box Starts With: the system will automatically select the unique value that starts with the text entered in the search box or list box
Parts to hide <i>Remark: These settings apply when rendering the property in writable mode</i>	<input checked="" type="checkbox"/> (Select all): all options below are checked <input checked="" type="checkbox"/> AdvancedSearchBox: the property is rendered with a  button and a pop-up window to make a selection (only in combination with multi select option) <input type="checkbox"/> AdvancedSearchBox: no popup window available <input checked="" type="checkbox"/> SelectedBox: the selected values of the property are rendered in a table <input type="checkbox"/> SelectedBox: no table is shown for the selected values <input checked="" type="checkbox"/> Deletelcon: an  icon is added to be able to delete entries in the table with selections, applicable if <input checked="" type="checkbox"/> SelectedBox is checked <input type="checkbox"/> Deletelcon: no  is rendered. Deletion is not possible from the selected values. <i>If no option is checked, 'None' is displayed in DomaAdmin</i>
Display Style <i>Remark: These settings apply when rendering the property in writable mode</i>	Inline: the property is rendered as a dropdown list Popup: the property is rendered as a pop-up screen with a  button Both: Inline and Popup are active
Radio buttons Checkboxes	<i>Remark: Only available when Display Style = Inline.</i> <i>Remark: If this option is combined with multi select, Radio buttons will change into Checkboxes.</i> <input checked="" type="checkbox"/> The list items are presented as individual items with a radio button before them. If checked, the number of items per row needs to be entered <input type="checkbox"/> The list items are presented in a dropdown list.
Multi select	<input checked="" type="checkbox"/> The end user can select more than one item out of the list. <input type="checkbox"/> Only one item of the list can be selected by the end user.
Refresh on change	<input checked="" type="checkbox"/> The screen in the web interface will be automatically saved and refreshed when the end user selects a new value in this field. <input type="checkbox"/> The screen in the web interface will not be automatically saved and refreshed when the end user selects a new value in this field.
Managed List	Select the managed list (must be defined first in the DocRoom Web Interface)

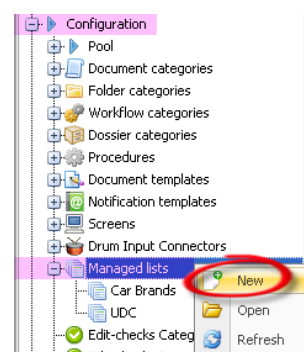
2.3 Create managed list of the type LIST

2.3.1 Why create a managed list of this type?

- To administer a managed list, you don't need to have application administrator rights. Normal users or key user can thus administer one or more managed lists directly from the web interface.
- You can define translations for the words in your managed list. This means different language can be supported, which is not the case with a property type list.


2.3.2 Configuration in the Doma admin module

- Start the **Doma Admin** module.
- Select the **Managed lists** item in the navigation tree.
- Click on the right mouse button - a menu appears: select the option **New**.




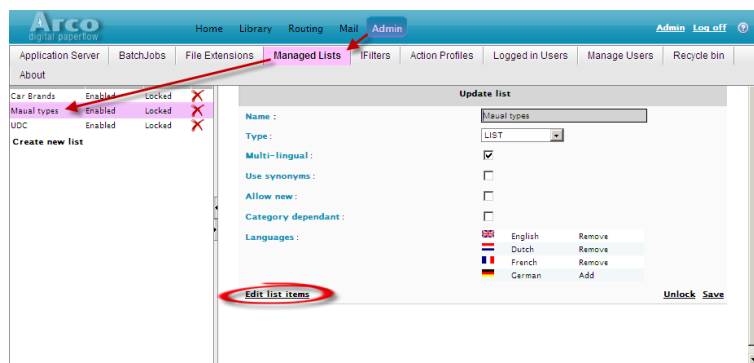
- The system opens a new configuration tab for a managed list.


- Enter a name for the managed list in the field **Name**.
- Select the type **List** in the dropdown list **Type**.
- Select the checkbox **Multi Lingual** if you want to enter words to the list with a translation to one or more of the next languages: English, Dutch, French, German.
- If you have selected the option multi lingual, the checkboxes E (English), N (Dutch), F (French) and G (German) become enabled. Select the languages for which you want to enter a translation.
- Select the checkbox **Use Synonyms** if you want to link a synonym to your word. This synonym can be used to catalogue a document under the correct term.
- Select the checkbox **Category dependant** if you want to link the list to a specific category. The list will then only be shown for that category.
- Define whether the user is allowed or not allowed to add new words to the list. If the user is allowed to add items, he/she can do so **without validation**, i.e. the new items will immediately be published in the list or **with validation**, i.e. the item will only appear in the list after they are validated by a key user.

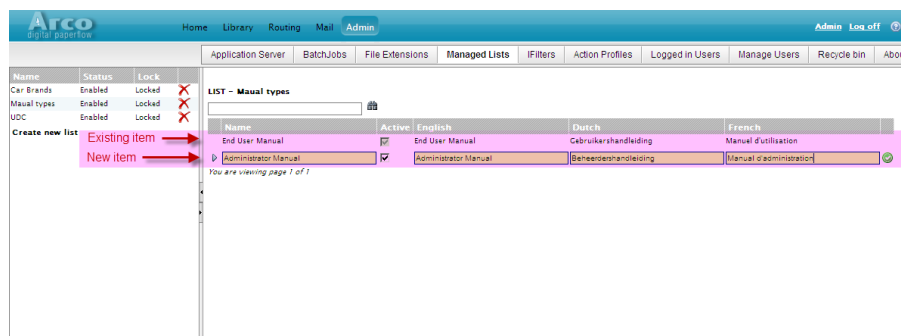
- Define whether you want to link another managed list to the current managed list. If so, you can select one from the dropdown box **Linked list**. Linked lists allow us to select only certain items in a list based upon a selection made in a previous list. (E.g. in one list you can select Europe and USA, in the second one you can select Belgium, Spain, Germany, Alaska, Texas, New York, etc. If the two lists are linked, you can limit the second list based upon the selection made in the first. E.g. if Europe was selected in the first, only the values Belgium, Spain and Germany will appear. **This functionality is not yet implemented in the current DocRoom version (v. 6.0.0).**
- Finally, update the status in the field **Status**: put the list in **production**, i.e. available to use or **disabled**, i.e. not available for use.
- Now click on the **save** button  in the toolbar of the tab of the managed list you created.

2.3.3 Edit list in WebInterface

- Click on the button  in the ribbon above the configuration screen to edit the list items in the WebInterface.
- The Doma webinterface opens. Select the item **Admin** in the green navigation bar.
- Then select **Managed lists** in the toolbar that appears below the green navigation bar.
- Then select the list you want to edit. (*Manual types* in the example)
- Click on the option **Edit list items** in the left lower corner of the screen.



- The list now appears, showing all existing item and one row in which you can enter a new list item. Enter all data of the new item and click on the icon  next to the row to save.



2.3.4 Configuration of the list items in the web interface

- Click on the button **Open list items** in the toolbar of the tab of the managed list you created.
- The DocRoom web interface opens: in the right pane, you see the message "Please enter list items" - enter a list item in the field below this message,
- Press the [Tab] key two times to focus on the green insert button at the right of the row, the press [Enter]
- .The value appears above the insert field.
- Repeat the insert action until you have entered all list items.
- Close the window.

2.3.5 Link the managed list to a property so it can be used in a category

- Create a property of the type MNGDLIST and select the corresponding managed list in the field. Managed List.

2.4 Create a managed list of the type CODELIST


How to create a managed list of the type Codelist using the Doma Admin module and the web interface.

2.4.1 Configuration in the Doma admin module

- Start the Doma Admin module.
- Select the *Managed lists* item in the navigation tree.
- Click on the right mouse button - a menu appears: select the option *New*.
- The system opens a new configuration tab for a managed list.
- Enter a name for the managed list in the field **Name**.
- Select the type **Codelist** in the dropdown list **Type**.
- Select the checkbox **Multi Lingual** if you want to enter words to the list with a translation to one or more of the next languages: English, Dutch, French, German.
- If you have selected the option multi lingual, the checkboxes E (English), N (Dutch), F (French) and G (German) become enabled in the administration part in the web interface. There you can select the languages for which you want to enter a translation.
- Select the checkbox **Use Synonyms** if you want to link a synonym to your word. This synonym can be used to catalogue a document under the correct term.
- Select the checkbox **Category dependant** if you want to link the list to a specific category. The list will then only be shown for that category.
- Allow new:
 - **Not allowed:** User is not allowed to add new values to the list.
 - **Without validation:** The user is allowed to add new items to the list without validation, i.e. the new items will immediately be published in the list.
 - **With validation:** The user is allowed to add new items to the list, but it will only appear in the list after it has been validated by a key user/
- Define whether you want to link another managed list to the current managed list. If so, you can select one from the dropdown box **Linked list**. Linked lists allow us to select only certain items in a list based upon a selection made in a previous list. (E.g. in one list you can select Europe and USA, in the second one you can select Belgium, Spain, Germany, Alaska, Texas, New York, etc. If the two lists are linked, you can limit the second list based upon the selection made in the first. E.g. if Europe was selected in the first, only the values Belgium, Spain and Germany will appear. ***This functionality is not yet implemented in the current DocRoom version (v. 6.1.5).***
- Finally, update the status in the field **Status**: put the list **in production**, i.e. available to use or **disabled**, i.e. not available for use.
- Now click on the **save** button in the toolbar of the tab of the managed list you created.

2.4.2 Configuration of the list items in the web interface

- Select the option **Admin** in the navigation bar of the web interface.
- The admin screen appears. Now select the option **Manage lists** in the file menu of this page.

- A new screen appears, containing an overview of all existing managed lists in a frame at the left; at the right of this frame, you see a screen to create a new managed list.
- Select the managed list you have created in the Doma admin module in the overview with a click on the name of the list.
- The details of this list now appear at the right.
- Click on the option **Edit list items** in the left lower corner.
- An insert screen appears for the code list.
- Enter the code in the first column, the name in the second column. If you have selected translations, you will see extra language columns. Here you can enter the translations for the item.
- Click on the insert icon  next to the row to save the item.
- A new line in h-which you can enter a next list item appears.
- Repeat the insert action until you have entered all list items.
- Close the window.

2.4.3 Link the managed list to a property so it can be used in a category

- Create a property of the type MNGDLIST and select the corresponding managed list in the field. Managed List.

2.5 Create a managed list of the type UDCLIST

2.5.1 Configuration in the Doma admin module

- Start the Doma Admin module.
- Select the Managed lists item in the navigation tree.
- Click on the right mouse button - a menu appears: select the option *New*.
- The system opens a new configuration tab for a managed list.
- Enter a name for the managed list in the field **Name**.
- Select the type **Codelist** in the dropdown list **Type**.
- Select the checkbox **Multi Lingual** if you want to enter words to the list with a translation to one or more of the next languages: English, Dutch, French, German.
- If you have selected the option multi lingual, the checkboxes E (English), N (Dutch), F (French) and G (German) become enabled. Select the languages for which you want to enter a translation.
- Select the checkbox **Use Synonyms** if you want to link a synonym to your word. This synonym can be used to catalogue a document under the correct term.
- Select the checkbox **Category dependant** if you want to link the list to a specific category. The list will then only be shown for that category.
- Define whether the user is allowed or not allowed to add new words to the list. If the user is allowed to add items, he/she can do so **without validation**, i.e. the new items will immediately be published in the list or **with validation**, i.e. the item will only appear in the list after they are validated by a key user.
- Define whether you want to link another managed list to the current managed list. If so, you can select one from the dropdown box **Linked list**. Linked lists allow us to select only certain items in a list based upon a selection made in a previous list. (E.g. in one list you can select Europe and USA, in the second one you can select Belgium, Spain, Germany, Alaska, Texas, New York, etc. If the two lists are linked, you can limit the second list based upon the selection made in the first. E.g. if Europe was selected in the first, only the values Belgium, Spain and Germany will appear. ***This functionality is not yet implemented in the current DocRoom version (v. 6.0.0).***
- Finally, update the status in the field **Status**: put the list **in production**, i.e. available to use or **disabled**, i.e. not available for use.
- Now click on the **save** button in the toolbar of the tab of the managed list you created.

2.5.2 Configuration of the list items in the web interface

- Click on the button **Open list items** in the toolbar of the tab of the managed list you created.
- The DocRoom web interface opens: in the right pane, you see the message "Please enter list items" - enter a list item in the field below this message,
- Press the [Tab] key two times to focus on the green insert button at the right of the row, then press [Enter]
- The value appears above the insert field.
- Repeat the insert action until you have entered all list items.
- Close the window.

2.5.3 Link the managed list to a property so it can be used in a category

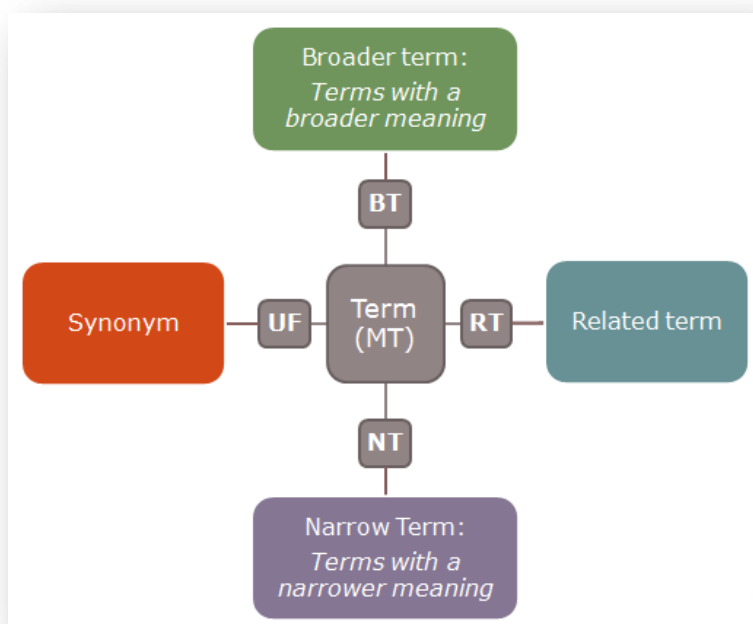
- Create a property of the type MNGDLIST and select the corresponding managed list in the field. Managed List.

2.6 Create a managed list of the type THESAURUS

2.6.1 Definition and usage

2.6.1.1 Definition

A thesaurus is a reference work that lists words grouped together according to similarity of meaning (containing synonyms and sometimes antonyms), in contrast to a dictionary, which contains definitions.



In a thesaurus we can distinguish the next items:

- Term (MT = Main term) = the lemma
- Narrow Term (NT) = term with a narrower meaning than the term.
- Broader term (BT) = term with a broader meaning than the term.
- Related term (RT) = term related to the term
- Synonym (UF = Use for) = term with the same meaning as the main term

Of course, broader term will be terms with their own narrow term, boarder term, etc.

2.6.1.2 Usage

The thesaurus functionality is currently limited to the presentation of the terms in an hiërarchichal structure. From this structure you can select the terms.

When using the thesaurus field for search, the system will serach on all translations and on the synonyms of the term (E.g. a user who searches on 'El Che' will find all documents that were indexed on 'che guevara' if the one is entered as a synonym of the other).

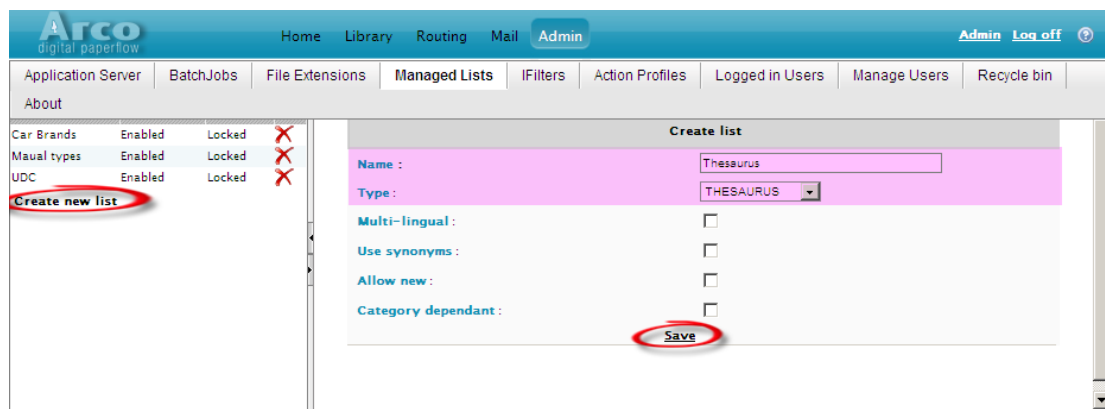
There is no possibility to use other thesaurus relations for search.

This means that the broader term and the narrow term relations can only be used in the vocabulary screen to find the correct term, but once the term has been found, you cannot search on the term and its broader and/or narrow terms.

2.6.2 Configuration in the Doma admin module

- Start the Doma Admin module.
- Select the Managed lists item in the navigation tree.
- Click on the right mouse button - a menu appears: select the option *New*.
- The system opens a new configuration tab for a managed list.
- Enter a name for the managed list in the field **Name**.
- Select the type **Codelist** in the dropdown list **Type**.
- Select the checkbox **Multi Lingual** if you want to enter words to the list with a translation to one or more of the next languages: English, Dutch, French, German.
- If you have selected the option multi lingual, the checkboxes E (English), N (Dutch), F (French) and G (German) become enabled. Select the languages for which you want to enter a translation.
- Select the checkbox **Use Synonyms** if you want to link a synonym to your word. This synonym can be used to catalogue a document under the correct term.
- Select the checkbox **Category dependant** if you want to link the list to a specific category. The list will then only be shown for that category.
- Define whether the user is allowed or not allowed to add new words to the list. If the user is allowed to add items, he/she can do so **without validation**, i.e. the new items will immediately be published in the list or **with validation**, i.e. the item will only appear in the list after they are validated by a key user.
- Define whether you want to link another managed list to the current managed list. If so, you can select one from the dropdown box **Linked list**. Linked lists allow us to select only certain items in a list based upon a selection made in a previous list. (E.g. in one list you can select Europe and USA, in the second one you can select Belgium, Spain, Germany, Alaska, Texas, New York, etc. If the two lists are linked, you can limit the second list based upon the selection made in the first. E.g. if Europe was selected in the first, only the values Belgium, Spain and Germany will appear. **This functionality is not yet implemented in the current DocRoom version (v. 6.0.0).**
- Finally, update the status in the field **Status**: put the list **in production**, i.e. available to use or **disabled**, i.e. not available for use.
- Now click on the **save** button in the toolbar of the tab of the managed list you created.

The same actions can be done in the Doma WebInterface, as you can see in the screenshots below:



Arco digital paperflow

Home Library Routing Mail Admin

Application Server BatchJobs File Extensions **Managed Lists** IFilters Action Profiles Logged in Users Manage Users Recycle bin

About

Car Brands	Enabled	Locked	✗
Maual types	Enabled	Locked	✗
UDC	Enabled	Locked	✗

Create new list

Update list

Name :

Type :

Multi-lingual : ☒

Use synonyms : ☒

Allow new : ☐

Category dependant : ☐

Languages :

	English	Add
	Dutch	Add
	French	Add
	German	Add

Edit list items (circled in red)

Unlock Save

2.6.3 Configuration of the list items in the web interface

- Click on the button **Open list items** in the toolbar of the tab of the managed list you created.
- The DocRoom web interface opens: in the right pane, you see the message "Please enter list items" - enter a list item in the field below this message,
- Press the [Tab] key two times to focus on the green insert button at the right of the row, the press [Enter]
- The value appears above the insert field.
- Repeat the insert action until you have entered all list items.
- Close the window.

Arco digital paperflow

Home Library Routing Mail Admin

Application Server BatchJobs File Extensions **Managed Lists** IFilters Action Profiles Logge

Name	Status	Lock	
Car Brands	Enabled	Locked	✗
Maual types	Enabled	Locked	✗
Thesaurus	Enabled	Locked	✗
UDC	Enabled	Locked	✗

Create new list

THESAURUS - Thesaurus

Expand info ▼ - Collapse info ▲
Expand all - Collapse all

THESAURUS - Thesaurus

Please enter list items

Abattoirs (circled in red)

You are viewing page 1 of 1

Arco digital paperflow

Home Library Routing Mail Admin

Application Server BatchJobs File Extensions **Managed Lists** IFilters Action Profiles Logge

Name	Status	Lock	
Car Brands	Enabled	Locked	✗
Maual types	Enabled	Locked	✗
Thesaurus	Enabled	Locked	✗
UDC	Enabled	Locked	✗

Create new list

THESAURUS - Thesaurus

Expand info ▼ - Collapse info ▲
Expand all - Collapse all

THESAURUS - Thesaurus

Abattoirs (circled in red)

You are viewing page 1 of 1

Arco digital paperflow

Home Library Routing Mail Admin

Application Server BatchJobs File Extensions **Managed Lists** IFilters Action Profiles Logged in U

Name	Status	Lock	
Car Brands	Enabled	Locked	✗
Maual types	Enabled	Locked	✗
Thesaurus	Enabled	Locked	✗
UDC	Enabled	Locked	✗

Create new list

THESAURUS - Thesaurus

THESAURUS - Thesaurus

Abattoirs

Edit

Translations

Synonyms

Relationships

Narrow terms

Delete

THESAURUS - Thesaurus

Name

Active

Abattoirs

You are viewing page 1 of 1

Arco digital paperflow

Home Library Routing Mail Admin

Application Server BatchJobs File Extensions **Managed Lists** IFilters Action Profiles Logged in Users Manage Users Recycle bin About

Name	Status	Lock	
Car Brands	Enabled	Locked	✗
Maual types	Enabled	Locked	✗
Thesaurus	Enabled	Locked	✗
UDC	Enabled	Locked	✗

Create new list

THESAURUS - Thesaurus

Abattoirs

Expand info - Collapse info

Expand all - Collapse all

List : THESAURUS - Thesaurus

Description : Abattoirs

Homonym :

Scope note :

Open in new window

Save

Translations Synonyms Relationships Narrow terms

Synonym

Please enter synonym

Slaughterhouses

English

You are viewing page 1 of 1

Arco digital paperflow

Home Library Routing Mail Admin

Application Server BatchJobs File Extensions **Managed Lists** IFilters Action Profiles Logged in Users Manage Users Recycle bin About

Name	Status	Lock	
Car Brands	Enabled	Locked	✗
Maual types	Enabled	Locked	✗
Thesaurus	Enabled	Locked	✗
UDC	Enabled	Locked	✗

Create new list

THESAURUS - Thesaurus

Abattoirs

Expand info - Collapse info

Expand all - Collapse all

List : THESAURUS - Thesaurus

Description : Abattoirs

Homonym :

Scope note :

Open in new window

Save

Translations Synonyms Relationships Narrow terms

Synonym

Please enter synonym

Slaughterhouses

English

You are viewing page 1 of 1

Abattoirs

List : THESAURUS - Thesaurus

Description :

Homonym :

Scope note :

[Open in new window](#) [Save](#)

Translations

Synonyms

Relationships

Narrow terms

Language	Description	Scope note
E		
N		
F		

Abattoirs

List : THESAURUS - Thesaurus

Description :

Homonym :

Scope note :

[Open in new window](#) [Save](#)

Translations

Synonyms

Relationships

Narrow terms

Synonym	Language
Slaughterhouses	E
<input type="text"/>	English English

You are viewing page 1 of 1

Abattoirs

List : THESAURUS - Thesaurus

Description :


Homonym :


Scope note :


[Open in new window](#) [Save](#)

Translations Synonyms **Relationships** Narrow terms

Description 1 Description 2 Link type



Abattoirs  [Add](#)

 Abattoirs [Add](#)

Abattoirs

List : THESAURUS - Thesaurus

Description :

Homonym :

Scope note :

[Open in new window](#) [Save](#)

Translations Synonyms Relationships **Narrow terms**

Name	Active	English	Dutch	French
Please enter list items	<input type="checkbox"/>			
<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

You are viewing page 1 of 1

2.6.4 Link the managed list to a property so it can be used in a category

- Create a property of the type MNGDLIST and select the corresponding managed list in the field. Managed List.

2.7 Create a managed list of the type CONCEPT TREE

2.7.1 Configuration in the Doma admin module

- Start the Doma Admin module.
- Select the Managed lists item in the navigation tree.
- Click on the right mouse button - a menu appears: select the option *New*.
- The system opens a new configuration tab for a managed list.
- Enter a name for the managed list in the field **Name**.
- Select the type **Codelist** in the dropdown list **Type**.
- Select the checkbox **Multi Lingual** if you want to enter words to the list with a translation to one or more of the next languages: English, Dutch, French, German.
- If you have selected the option multi lingual, the checkboxes E (English), N (Dutch), F (French) and G (German) become enabled. Select the languages for which you want to enter a translation.
- Select the checkbox **Use Synonyms** if you want to link a synonym to your word. This synonym can be used to catalogue a document under the correct term.
- Select the checkbox **Category dependant** if you want to link the list to a specific category. The list will then only be shown for that category.
- Define whether the user is allowed or not allowed to add new words to the list. If the user is allowed to add items, he/she can do so **without validation**, i.e. the new items will immediately be published in the list or **with validation**, i.e. the item will only appear in the list after they are validated by a key user.
- Define whether you want to link another managed list to the current managed list. If so, you can select one from the dropdown box **Linked list**. Linked lists allow us to select only certain items in a list based upon a selection made in a previous list. (E.g. in one list you can select Europe and USA, in the second one you can select Belgium, Spain, Germany, Alaska, Texas, New York, etc. If the two lists are linked, you can limit the second list based upon the selection made in the first. E.g. if Europe was selected in the first, only the values Belgium, Spain and Germany will appear. **This functionality is not yet implemented in the current DocRoom version (v. 6.0.0).**
- Finally, update the status in the field **Status**: put the list **in production**, i.e. available to use or **disabled**, i.e. not available for use.
- Now click on the **save** button in the toolbar of the tab of the managed list you created.

2.7.2 Configuration of the list items in the web interface

- Click on the button **Open list items** in the toolbar of the tab of the managed list you created.
- The DocRoom web interface opens: in the right pane, you see the message "Please enter list items" - enter a list item in the field below this message,
- Press the [Tab] key two times to focus on the green insert button at the right of the row, then press [Enter]
- The value appears above the insert field.
- Repeat the insert action until you have entered all list items.

- Close the window.

2.7.3 Link the managed list to a property so it can be used in a category

- Create a property of the type MNGDLIST and select the corresponding managed list in the field. Managed List.

2.8 Edit a managed list

How to edit a managed list

Administration of a managed list is done in the DocRoom WebInterface.

- Select the option **Admin** in the navigation bar of the web interface.
- The admin screen appears. Now select the option **Manage lists** in the file menu of this page.
- A new screen appears, containing an overview of all existing managed lists in a frame at the left; at the right of this frame, you see a screen to create a new managed list.
- Click on the name of the managed list you want to edit.
- The details of the managed list appear at the right. If you have sufficient rights, the option **Edit list items** will appear in the left lower corner.
- Click on this option to edit the list items.

2.9 Delete a managed list

How to delete a managed list...

... using the Doma Admin module.


- Start the Doma Admin module.
- Select the Managed lists item in the navigation tree.
- Click on the + icon at the left side of the item to unfold the sub-items.
- Select the managed list you want to delete.

Open the detail:

- Double click on the item in the navigation tree.
- OR
- Click on the right mouse button and select the option *Edit* in the window that appears.
- The system opens the configuration tab of the selected managed list.
- Click on the **Delete** button in the toolbar.
- A warning message "Are you sure you want to delete this list?" appears.
- Click **Yes** to confirm, No to cancel.
- If you confirmed, the list is deleted.

... using the Doma web interface

- Select the option **Admin** in the navigation bar of the web interface.

- The admin screen appears. Now select the option **Manage lists** in the file menu of this page.
- A new screen appears, containing an overview of all existing managed lists in a frame at the left; at the right of this frame, you see a screen to create a new managed list.
- Click on the delete icon  next to the name of the managed list you want to delete.
- The list is deleted without any warning.

Mind

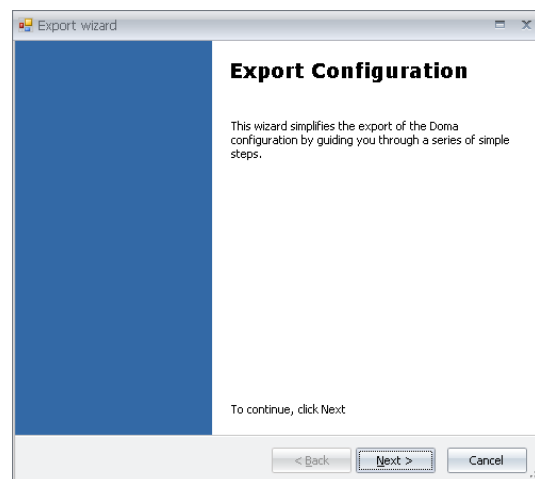
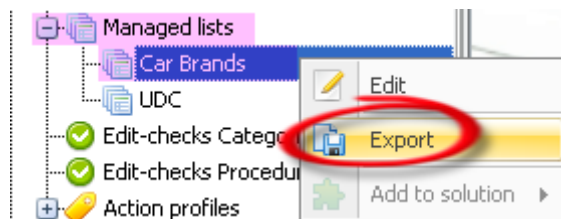
When you delete a list here, it will not be available anymore for the indexation of the categories where it was linked to.

2.10 Export a managed list

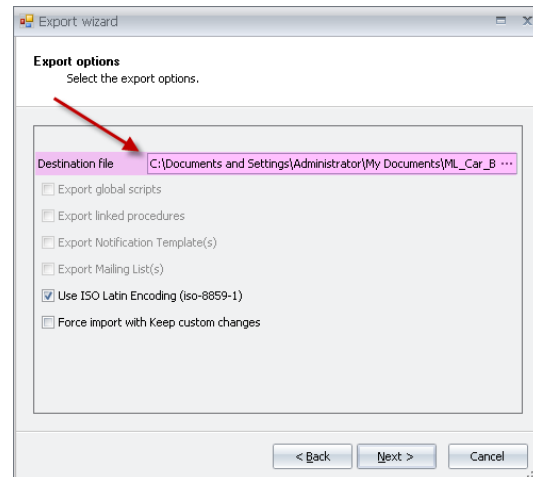
Managed list can be exported to reuse them in another Doma environment.

To export managed lists:

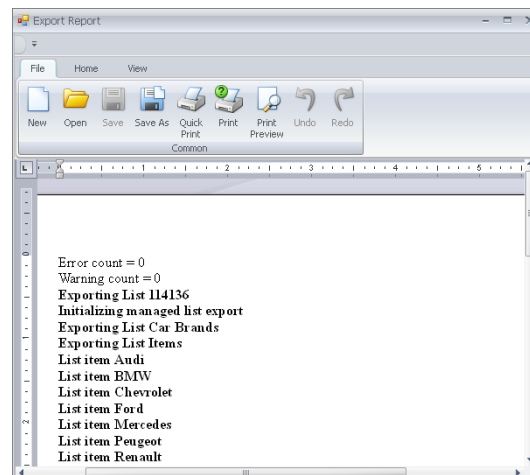
- Open the Doma Admin module.
- Select the item **Managed lists** in the **configuration** part of the navigation tree and click on the right mouse button.
- A menu will appear, select the option **Export**.
- The export wizard appears – click **Next** to continue.



- The export options appear.
- Enter the destination file: click on the **browse** button ... at the right of the field **Destination file** and select the location where the file must be saved. Then click **Next** to continue.



- A progress bar appears, showing the export progress.
- After the export, the export report appears, so you know whether the export succeeded or not. Close it after reading.



- The export status is shown. Click on the button **Finish**.

