

How To Use DUNE's Document Management Repository (DocDB)

Eileen Berman and Anne Heavey
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Introduction

DocDB is the document management repository in use by DUNE to store all types of files. DocDB provides backups and versioning of documents, and is web accessible. This document lists some of the basic functionality provided by DocDB. It is not meant to be an exhaustive list but a guide to the most commonly used functionality.

Getting Help

- DocDB has built in Help pages - there is a **'Help'** link along the top and bottom list of links on every page
- Terms listed in **red** on DocDB pages are links to additional information
- Questions, requests, issues, and suggestions for this document can be sent to
 - dune-communication@fnal.gov

Some Terms Defined

Access Permissions

- *Modifiable By* - Documents with this access permission can be updated by the listed groups
- *Viewable By* - Documents with this access permissions can be downloaded and opened by the listed groups

Approver

An approver is an individual that has been explicitly given the permissions to signoff on documents. A person can become an approver by sending email to dune-communication@fnal.gov.

Document

A document is a DocDB structure that relates one or more files with additional information (metadata) about the file(s).

Event

DocDB supports agendas of meetings etc, and associating documents with that event. New Events can be created by selecting the [Create or change documents or other information](#) link on the DocDB home page.

File

DocDB supports storing of files within a structure called a document. A file is an electronic file, and may contain any type of information (text, video, picture...). It is suggested that files stored in a document in DocDB include a format readable by all.

Group

A group is an access mechanism for setting permissions on who is allowed to view and who is allowed to modify documents. Most individuals who access DocDB use one or more group usernames and passwords. Individuals who access DocDB using

a certificate in their browser are assigned a set of groups to which they have access. Membership in a group is set on a person-by-person basis and can be changed by sending email to dune-communication@fnal.gov.

Keyword

A keyword is a mechanism for grouping documents into finer categories than a Topic allows. Keywords can be defined by anyone, and should be used with caution. Currently, the DUNE DocDB does not officially make use of keywords.

DB Info

Every document has several types of DB Info associated with it that provide information about the document. Some examples of the DB Info include; Title, Author(s), Document Type, associated Topics.

Related Documents

This feature provides a means to link documents within DocDB via hyperlinks.

Submitter

The submitter is the person who is creating/updating the document. The submitter must be chosen from the list of Submitters, which is a copy of the Author list.

Topic

A topic is a broad category that can be associated with a document. This enables all documents associated with that category to be listed on one page. Topics are nested and there may be more than one topic associated with each document. A new Topic can be requested by sending email to dune-communication@fnal.gov.

Accessing DocDB

The DUNE DocDB can be accessed by pointing your browser to –

<http://docs.dunescience.org>

and selecting one of the following options –

- **Public** – allows access to the publically viewable documents only; no authentication required.
- **Private** – allows access to protected documents according to the permissions associated with the username/password that is used.
- **Certificate Version of DUNE DocDB** – select this if you have a certificate loaded in your browser that you would like to use to authenticate to the DUNE DocDB. If this is the first time you have done this, click on the “**apply for access**” link. Your request for access may take as much as a few hours to be addressed.

Create a New Document From Local Files

- Select “**Create or change documents or other information**” on the DocDB Home page.
- Fill in the first line with the number of files that you will upload and press “**Create a New**”.
- Fill in the “**Title**” with the title of this DocDB document.
- Fill in the “**Abstract**” with a description of the information in the files in this DocDB document.
- For each file to upload, use the “**Browse**” button to browse to the location on your computer of the file to upload. As an option, fill in a title for this file in the “**Description**” line.
- Select a “**Document type**”
- Select your name in the “**Submitter**” box. You can begin typing your name in the Submitter box and it will jump to your name (or close to it).
- Select the “**Authors**” of the files in this document. You can select more than one by holding down the Control/Command key (Microsoft/Macintosh) and selecting the names.
- Select the access permissions for “**View**” and “**Modify**”. You can select multiple permissions, as for Authors. The default should be the DUNE group for both modify and view access, unless there is a good reason otherwise.
- Select one or more “**Topics**” that this document will be associated with. To select multiple topics in a given list, hold down the Control/Command key (Microsoft/Macintosh) and select them.
- If appropriate, fill in “**Related Documents**” with DocDB numbers of related documents (you only need to use the numbers), with multiples separated by commas.
- Press the “**Submit document**” button

Update a Document with Modified File(s)

This example shows you how to upload a new version of a file in a document. It does not show you how to change the DB Info associated with the document, but you can do that, too. All fields marked with an asterisk ‘*’ are required.

- Enter the DocDB number in the “**SHOW DUNE-doc-***” line on the DocDB Home page. You do not need to enter a version.
- Press the “**Show**” button. You will end up on the page corresponding to the latest version of the document.
- Press the “**Update Document**” button on the left hand side. If you do not see this button, then you do not have permission to modify this document.
- Fill in “**Notes and Changes**” with a short description about what is being changed.

- There may be multiple files in the DocDB document. For each file that requires a new uploaded version – use the “**Browse**” button to browse to the location of the new file to be uploaded. There will be one line for each file currently in the document. If you are not updating a file, you **MUST** check the box where it specifies copying the file from the previous version. For example, if you have 3 files in a document, and you want to upload a new copy of file2, and delete file3, you will –
 - Select the Copy from a previous version for file1
 - Fill in the “**File**” location with the new version of file2
 - Do nothing for file3
 - Check the box “**New version has fewer files**”
 - Note: if you only want to update a small subset of the files in the entry, click “**Copy all files from previous version**”, then unclick the “**Copy**” button for the individual files that you will replace with new versions.
- Select your name in the “**Submitter**” box. You can begin typing your name in the Submitter box and it will jump to your name.
- Press the “**Update document**” button

Modify the DB Info About a Document

All fields marked with an asterisk ‘*’ are required. This will only allow changes to the metadata, not allow you to change a file in the document.

- Enter the DocDB number in the “**SHOW DUNE-doc-***” line on the DocDB Home page. You do not need to enter a version.
- Press the “**Show**” button. You will land on the page corresponding to the latest version of the document.
- Press the “**Update DB Info**” button on the left hand side. If you do not see this button, then you do not have permission to modify this document.
- Fill in “**Notes and Changes**” with a short description about what is being changed.
- Select your name in the “**Submitter**” box. You can begin typing your name in the Submitter box and it will jump to your name.
- Change the DB fields (e.g., View, Topics, etc.) as necessary.
- Press the “**Update document**” button

Delete a File From a Document

An example of how to delete a file from a document was included in the section “**Update a Document with Modified Files**”. Unfortunately, DocDB will not let you just delete a file from a document; you have to upload a new version of one of the other files in the document as well. You can download one of the files and then treat it as a modified file and follow the instructions in the “**Update a Document with Modified Files**” section.

Search in DocDB

DocDB allows you to search for documents meeting many different criteria. Here are some of the commonly used methods for searching for documents in DocDB –

- Enter the DocDB number in the “**SHOW DUNE-doc-***” line on the DocDB Home page. You do not need to enter a version.
- Select “**Advanced**” on the DocDB Home page. This will allow you to search on combinations of DB Info.
- To search for all documents where a specific Author is listed, select “**Authors**” on the DocDB Home Page, and then select the author from the displayed list. You also can do this for Topics, Groups, Keywords, and Events.

Add an Author

A person needs to be explicitly added as an Author, before they show up as a choice in the Author list.

- Select “**Create or change documents or other information**” on the DocDB Home page.
- Select “**author**” from the “**Add an author**” line.
- Select the Institution from the Institution Box. If the institution is not listed, you will need to request that it be added to the list by sending an email to dune-communication@fnal.gov.
- Fill in the new authors first and last name.
- Press the “**Add Author**” button.

Make a Document Obsolete

A document should be marked obsolete when either or both of the following are true -

- the document's content is no longer valid or relevant for DUNE or LBNF
- the document is superseded by a different document

This does not affect the adding of new versions of documents, which should continue to occur as it does now. DocDB will keep versions of all documents; so updating an existing document by uploading new versions of it will still preserve the old version and allow access to them. Please use this mechanism and do not create new documents (with a new DocDB number), if you are only updating a current document.

In order to mark a document obsolete, send a request to dune-communication@fnal.gov including the following information -

- the DocDB number of the document to mark obsolete
- the reason why this doc is being set as obsolete

- the DocDB number of the superseding document if there is one

HOW TO TELL IF A DOCUMENT HAS BEEN MARKED OBSOLETE

You will be able to tell if a document has been marked obsolete because the link that you select to open the document will start with the word - OBSOLETE. The reason and superseding document will be listed on the documents DocDB page if it was included in the 'make this doc obsolete' request.

Use Signoffs For a Document

This feature will allow documents to list one or more individuals (approvers) that have to sign off on new or modified documents. The DUNE Project plans to use this feature for approving documents in the future.

IMPORTANT - approvers of documents must access DocDB using a certificate that is loaded in their browser.

If you choose more than one approver, the approvers will have to sign off serially in the order listed.

New Documents

At the bottom of the new document page there is a box labeled 'Signoffs'. There is also a link ('Signoff Chooser') to the list of all people that have been enabled to be approvers for the DocDB as a whole. This list can be added to by sending a request to dune-communication@fnal.gov.

If the submitter chooses to enable signoffs for a document, click the 'Signoff Chooser' link and pick one or more individuals to signoff on the document. You can do this by selecting the names on the pop-up window in the order in which the approvals should occur. Approvers will be sent email in that order.

The status of the document will be 'Unapproved' until signoffs have completed. The list of selected approvers is at the bottom of the DocDB page for the document, and includes the status of the signoff process.

Updated Documents

When updating a document, all prior signoffs (approvals) are cleared. You can retain the same list of approvers, or you are allowed to change the approvers required, including removing all approvers. Then update the document as needed and any signoffs will be handled as for new documents.

Updates to DB Info

When updating DB info, you are allowed to change the approvers required, including removing all approvers. Then update the DB info as needed and any signoffs will be handled as for new documents.

Add Files to a Document (we recommend this not be used)

Adding a file does not allow any changes to the list of approvers including adding approvers back on. If the last version of the document did not have approvers listed, then there will be no approvers allowed during the add files function.

NOTE: this function should be used with caution!

Approvers

Approvers will receive an email requesting they 'sign' the document. A url of the document page is included in the email. This document page contains a button to press next to the name of the approver. This is called 'signing' a document. Once all approvers have 'signed' the document, the status will change to 'Approved'.