siatel

Gargantua Databases - Lists, Attributes, Forms

Administration Tool

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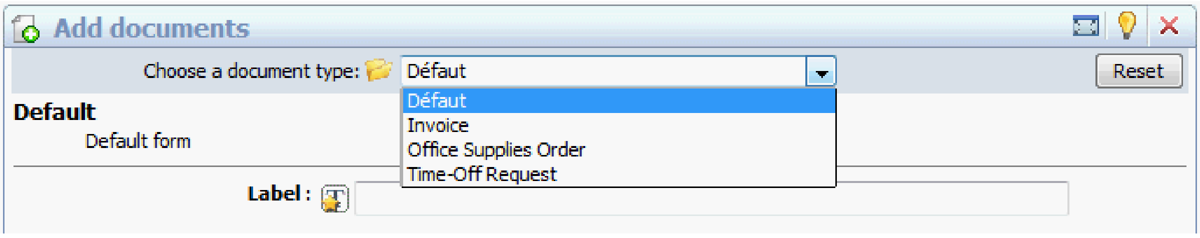
REMINDER ABOUT PRODUCTION OBJECTS INDEXING IN GARGANTUA

INDEXING FROM THE WEB CLIENT

When a Web Client user creates a new folder or document, he first needs to select a form which will determine the type of the newly created production object:



Indeed, each GARGANTUA form contains fields allowing to collect relevant and standard information about each object depending on its type: with these attribute/value pairs, it is then possible to carry out searches and easily find any production object stored in a database.

Form attributes can have different types of values: for example, fragments of text of varying lengths, numbers, dates, or one or more items selected in a list of values...

IMPLEMENTATION FROM THE ADMINISTRATION TOOL

To get this result in the Web Client, administrators need to create beforehand the corresponding forms, attributes, and lists, if some attributes rely on selection lists.

To do so, they must analyze the number and nature of the forms, attributes and lists that will be needed, according to the characteristics of the documents to process, knowing that a same attribute or list can sometimes be used in different contexts.

Then, as forms use attributes and attributes might use lists, it would make sense to create the lists first, then the attributes and, finally, the forms, following the procedures described in this guide.

EXAMPLE

A company wants to implement a “Mail” GARGANTUA database in order to store and classify incoming and outgoing mail.

After consideration, the company's employees determine that they need to include on each document the following information:

- Incoming mail: “Received On”, “Subject”, “From”;

- Outgoing mail: “Sent On”, “Subject”, “Sender”, “Addressee”.

Therefore you need to have:

- 2 forms: “Incoming mail” and “Outgoing mail”;
- 6 attributes:
    - “Addressee” - Attribute of open list type, containing the names of the usual correspondents;
    - “Sender” - Attribute of open list type, containing the names of the company's employees;
    - “From” - Attribute of open list type, suggesting to the user a predefined list of contacts while allowing him to enter new values;

    > ***It is often better to use a selection list rather than a text field. Indeed, lists reduce the amount of time spent typing, limit the number of typing errors, and increase the efficiency of the searches while ensuring that the same information always displays in the same form (for instance, “John Smith” instead of “J. Smith”, “Smith” or “Mr. Smith”).***

    - “Subject” - Attribute of text type, common to both forms;
    - “Sent On” - Attribute of date type;
    - “Received On” - Attribute of date type;
- 2 lists: “Employees” and “Contacts”, the latter being used by the “From” and “Addressee” attributes.

Once the analysis is carried out, administrators can create the necessary design objects: they first create the lists, then the attributes and, finally, the forms.

LISTS

CREATING A NEW LIST

To create a new list designed to be associated with one or several database attributes, proceed as follows:

1. In the left pane of the Administration Tool, expand the sub-branch corresponding to the GARGANTUA database of your choice.
2. Click the **Lists** sub-branch.

   The **Manage lists** screen displays in the right pane.

3. In the bottom left corner of the right pane, click the **New** button.

   The management screen of the new list displays.

4. Configure the new list using the fields and tools available.
5. When you are finished, click the **Apply** button at the bottom of the right pane.

   The new list has been created. You can go back to this screen later to modify and complete the settings if needed.

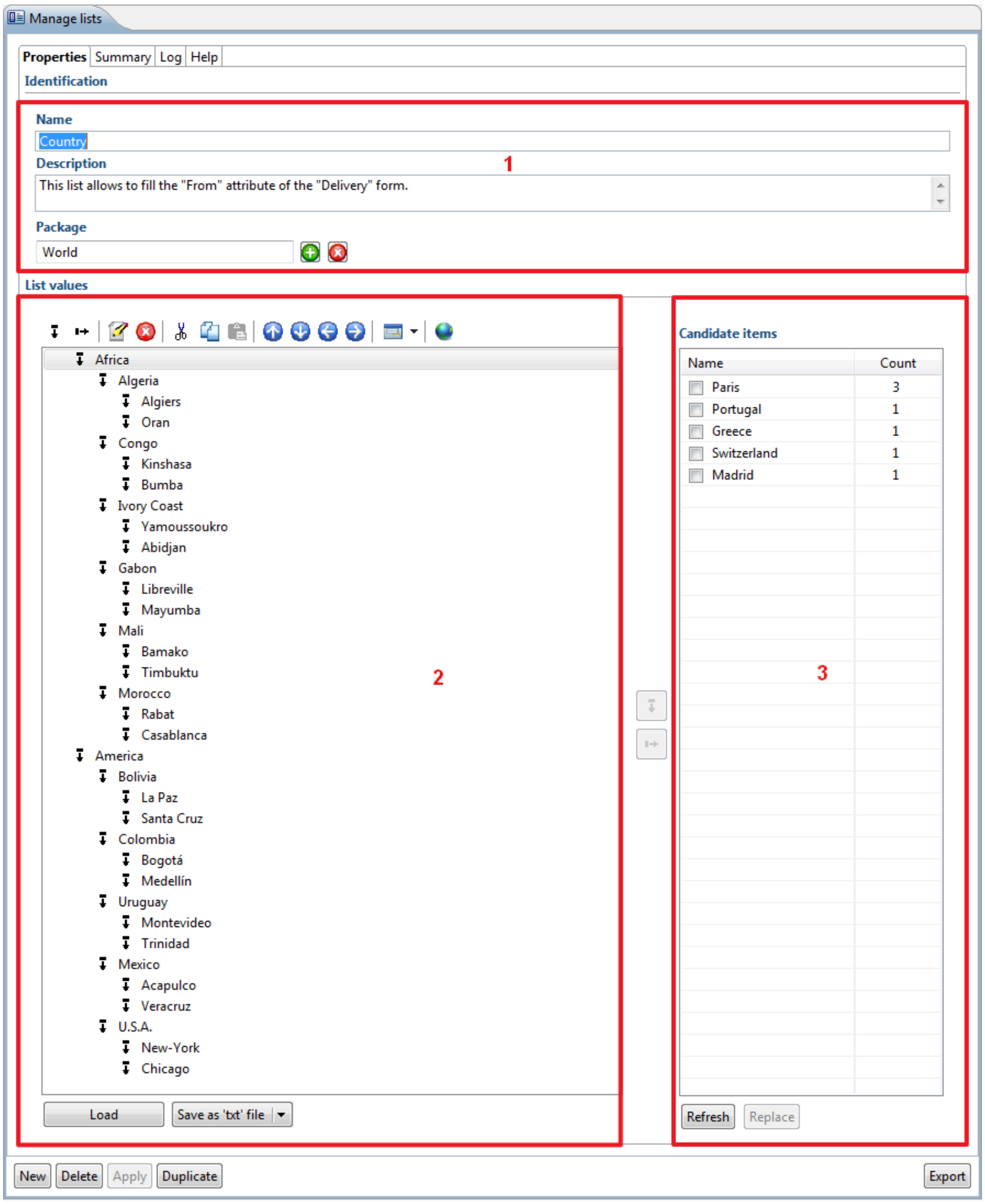
LIST MANAGEMENT SCREEN – AVAILABLE TABS

The management screen of a list contains the following tabs:

- The **Properties** tab gathers the list main settings: name and description, list values, etc.
- The **Summary** tab contains a summary of the list information. The PDF version of the summary can be used as a reference about the list design. It can be sent to users who do not have access to GARGANTUA Administration Tool.
- The **Log** tab allows you to view the list of all the operations performed on the list, and to filter them according to some criteria.
- The **Help** tab allows you to access the contextual help.

“PROPERTIES” TAB

The **Properties** tab of a list management screen is as follows:



1. Fields containing basic information about the list: name, description and package;
2. Editing area of the list;
    - The **Load** and **Save as ‘txt’/’xml’ file** buttons respectively allow you to import and export the list values as a .txt or .xml file. You can thus export the values of a list and import them again to create another similar list, possibly in another database.

> ***Please note that if you import a set of values in .txt or .xml format, the values already included in the list will be overwritten and lost.***

- The lists editing tool bar allows you to perform the following operations:
  - Add an item at the same level as the item currently selected in the list;
  - Add an item of n-1 level compared to the item currently selected in the list;
  - Edit the name of the item currently selected in the list;
  - Delete the item currently selected in the list;
  - Cut the item currently selected in the list;
  - Copy the item currently selected in the list;
  - Paste the last cut or copied item at the n-1 level compared to the item currently selected in the list;
  - Move down the item currently selected in the list;
  - Move up the item currently selected in the list;
  - Depending on the option selected, sort in ascending or descending alphabetical order the whole list, the level of the currently selected item, or the n-1 level compared to the selected item.
  - Switch to **Translation** mode. Display a table for translating the list values in the languages of your choice. Thus, when you switch to another language in the Web Client, the list values will be displayed in the selected language.

> *If it is possible to allow users to enter freely values that are not in the list in normal mode, it is not possible to do it in Translation mode: users must select a value from the list.*

> *You can switch again the list in normal mode, by clicking on the button, but this will erase all translations.*

3. Area allowing to include in the list candidates items freely entered by the Web Client users;

   This area is helpful to progressively complete a list when, for some form attributes, the **Open list** option is chosen, allowing users to enter values other than those suggested in the list.

   The **Count** column indicates how many times each candidate item has been used.

ADDING "CANDIDATE ITEMS" ENTERED BY USERS TO A LIST

To add candidate items entered by one or several Web Client users to a list, proceed as follows:

1. Below the **Candidate items** table, click the **Refresh** button to make sure you have the latest values contained in the forms.
2. In the **Name** column, check the checkbox corresponding to one of the candidate items you want to add to the list.
3. If you want to add the new item at the same level as the item currently selected in the list, click the

button.

If you want to add the new item at the n-1 level compared to the item currently selected in the list, click the button.

4. Repeat the operation as many times as needed in order to insert all the candidate items of your choice.

   If several items need to be added at the same level of the same tree structure, you can check and add them simultaneously.

5. When you are finished, click **Apply** to save the list.

Replacing “candidates items” with list items in the forms

To replace “candidates items” entered by Web Client users with list items in the forms, proceed as follows:

1. Below the **Candidate items** table, click the **Refresh** button to make sure you have the latest values contained in the forms.
2. In the **Name** column, check the checkboxes corresponding to the candidate items you want to replace.
3. Below the **Candidate items** table, click the **Replace** button.

   A dialog prompting you to enter the administration password displays.

4. Enter the “Admin” user password and click **OK**.

   The **Replace candidates type** dialog displays.

5. In the frame located at the bottom of the dialog, select the list item that will be used to replace the candidates items.
6. Click the **Replace** button.

   A dialog informing you that the operation might take time displays.

7. Click **Yes**.

   A confirmation message displays. The candidates items have been replaced by the list item.

How to import one or more lists in the .sxa format?

To import one or more lists in the .sxa format into a Gargantua database:

1. In the left pane of the Administration Tool, expand the sub-branch corresponding to the Gargantua database of your choice.
2. Click the **Lists** sub-branch.

   The **Manage lists** screen displays in the right pane.

3. In the bottom right corner of the screen, click the **Import** button.

The file explorer displays.

4. Browse to the folder where you have saved the .sxa archive, and click **Open**.

   The **Import objects** dialog displays, with all the database lists in the **Object** column.

5. Check the checkboxes corresponding to the lists that you want to import, or the checkbox corresponding to the **Lists** sub-branch if you want to import all the lists of the export.
6. If you want to override the lists of the target database that have the same name as imported lists, check the **Overwrite** checkbox.

   Otherwise, leave the checkbox unchecked. The lists imported will be renamed as “xxx **(1)**” if lists with the same name already exist in the database.

7. Click **OK**.

   A confirmation message displays.

8. Click **OK**.

   The **Manage lists** screen displays: the selected lists have been imported.

HOW TO EXPORT ONE OR SEVERAL LISTS IN THE .SXA FORMAT?

As for most GARGANTUA databases design objects, you can export or import the definitions and values of one or several lists as .sxa archives, for instance, to use them in another database.

To do so:

1. In the left pane of the Administration Tool, expand the sub-branch corresponding to the GARGANTUA database of your choice.
2. Click the **Lists** sub-branch.

   The **Manage lists** screen displays in the right pane.

3. In the bottom right corner of the screen, click the **Export** button.

   The **Export objects** dialog displays, with all the database lists in the **Object** column.

4. Check the checkboxes corresponding to the lists that you want to export, or the checkbox corresponding to the **Lists** sub-branch if you want to export all the database lists.
5. When you are finished, click **OK**.

   The file explorer displays.

6. Browse to the local or remote folder where you want to save the .sxa export, and click **Save**.

   A confirmation message displays.

7. Click **OK**.

   The .sxa export of the objects selected has been saved on your disk.

How to delete a list?

To delete a list, proceed as follows:

1. Make sure the list you want to delete is not being used by any attribute, or you will not be able to delete it.
2. In the left pane of the Administration Tool, expand the sub-branch corresponding to the Gargantua database of your choice.
3. Click the **Lists** sub-branch.

   The **Manage lists** screen displays in the right pane.

4. Click the row of the list you want to delete.
5. In the bottom left corner of the right pane, click the **Delete** button.

   A confirmation message displays.

6. Click **Yes**.

   The selected list disappears: it has been deleted.

"Summary" tab

The **Summary** tab allows you to display a summary of an item that presents its main features, like its manager, form, priority, content, etc.

The **Summary** tab is particularly helpful to have a general insight of the item, without having to browse through each tab.

The **Summary** tab also has a saving option in PDF format, which allows to view the summary of an item without the Gargantua Administration tool.

"Log" tab

The **Log** tab allows you to view a list of all the operations performed in one of the branches of Gargantua Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.

2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

*You can also click on the **"Week audits"**, **"Month audits"**, **"Year audits"** and **"All audits"** icons, so as to view the operations performed in larger periods of time.*

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.
3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

*You can tick the **"Show login/logout events"** box to display the users connections and disconnections. This functionality is only available for the **"Users"** and **"Server log"** branches.*

*You can tick the **"Only Show error audits box"** to only display the failed operations.*

*The **"Reset"** button allows you to cancel the last filtering.*

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

ATTRIBUTES

SYSTEM VS. NON-SYSTEM ATTRIBUTES

There can be two different kinds of GARGANTUA attributes:

- The **system attributes** are automatically created when installing GARGANTUA, without the administrator intervention. Afterwards, they are automatically entered for all the production objects added to the databases, without the administrator having to explicitly add them to the forms and without the Web Client users intervention.

  System attributes cannot be either deleted or modified. In the GARGANTUA interface, they are labeled with a icon.

  The system attributes are the following:

  - **Archive date**: date when the object was archived in the database;
  - **Create date**: date when the object was added to the database;
  - **Expire date**: date when the document of a validation cycle expires, as defined in the **Publication** stage;
  - **Flags**: information about document status (represented by status flags in the documents list: **CD archived**, **Locked**, **Notes**, / **Checked-out by the connected user/another user**, **Forum**);
  - **Label**: object name;

    > ***This system attribute is special: it must be manually entered by the Web Client user and must display in all the forms.***

  - **Modified by**: last user who modified a document or a folder;
  - **Modify date**: date when the object was last modified;
  - **Published date**: date when the document of a validation cycle was published;
  - **Requested by**: name of the user who started the validation cycle of the current document;
  - **Security profile**: security profile applied to the object, if any;
  - **Owner**: name of the user who created the object or to whom its ownership was transferred;
  - **File size**: size of the file corresponding to the object, if any;
  - **File type**: extension of the file corresponding to the object, if any;
  - **Type**: name of the form associated to the object;
  - **URL**: access path of the file on GARGANTUA server, if any;
  - **Validated by**: name of the user who validated the document, at the end of a validation cycle;
  - **Validation date**: date when the document of a validation cycle was validated;
  - **Validity time**: validity time of the document of a validation cycle, as defined in the **Publication** stage;

- **Version**: modified documents version number, if any;
- **Expired**: indicates, if checked, that the expire date (as defined in a validation cycle) of the selected document has expired;
- **Operative**: indicates, if checked, that the selected document has been published by a validation cycle, and that its expire date has not expired;
- **Published**: indicates, if checked, that the selected document has been published by a validation cycle ;
- **Validated**: indicates, if checked, that the selected document has been validated by a validation cycle ;
- **Being validated**: indicates, if checked, that the selected document is being validated.

- The **non-system attributes** can be deleted and some of their properties can be modified.

TYPES OF GARGANTUA ATTRIBUTES

There are different types of non-system attributes that can be created by administrators:

- **String**: to store strings limited to 512 characters, including spaces;
- **Integer**: to store positive or negative whole numbers;
- **Float**: to store positive or negative decimal numbers;
- **Date**: to store dates in the mm/dd/yyyy format;
- **Timestamp**: to store dates in the mm/dd/yyyy format and hours in the hh:mm format;
- **Time of day**: to store system hours in the hh:mm format;
- **Time delay**: to store delays in the 000d 00h 00m;
- **Web address**: to store URLs in the http:// or ftp:// format;
- **Boolean**: to store Yes/No, True/False values in the form of two radio buttons or a checkbox;
- **Email**: to store email addresses;
- **Currency**: to store values corresponding to currency units;
- **Text area**: to store strings of more than 512 characters; the length is not limited; text can be formatted;

> ***The "text areas" attributes can be searched only if full-text search is enabled on the corresponding database.***

- **Counter**: to insert a counter to the objects added to a database;
- **Opinion**: to give an opinion on a document in a process, or to grade it;
- **Users list**: to store one or more values selected in the **Users** branch;
- **Roles list**: to store one or more values selected in the **Roles** branch;
- **Groups list**: to store one or more values selected in the **Groups** branch;
- **Document templates list**: to store one or more values selected in the **Document templates** branch;
- **E-mail templates list**: to store one or more values selected in the **E-mail templates** list.

Creating a new attribute

To create a new attribute, proceed as follows:

1. In the left pane of the Administration Tool, expand the sub-branch corresponding to the Gargantua database of your choice.
2. Click the **Attributes** sub-branch.

   The **Manage attributes** screen displays in the right pane.

3. In the bottom left corner of the right pane, click the **New** button.

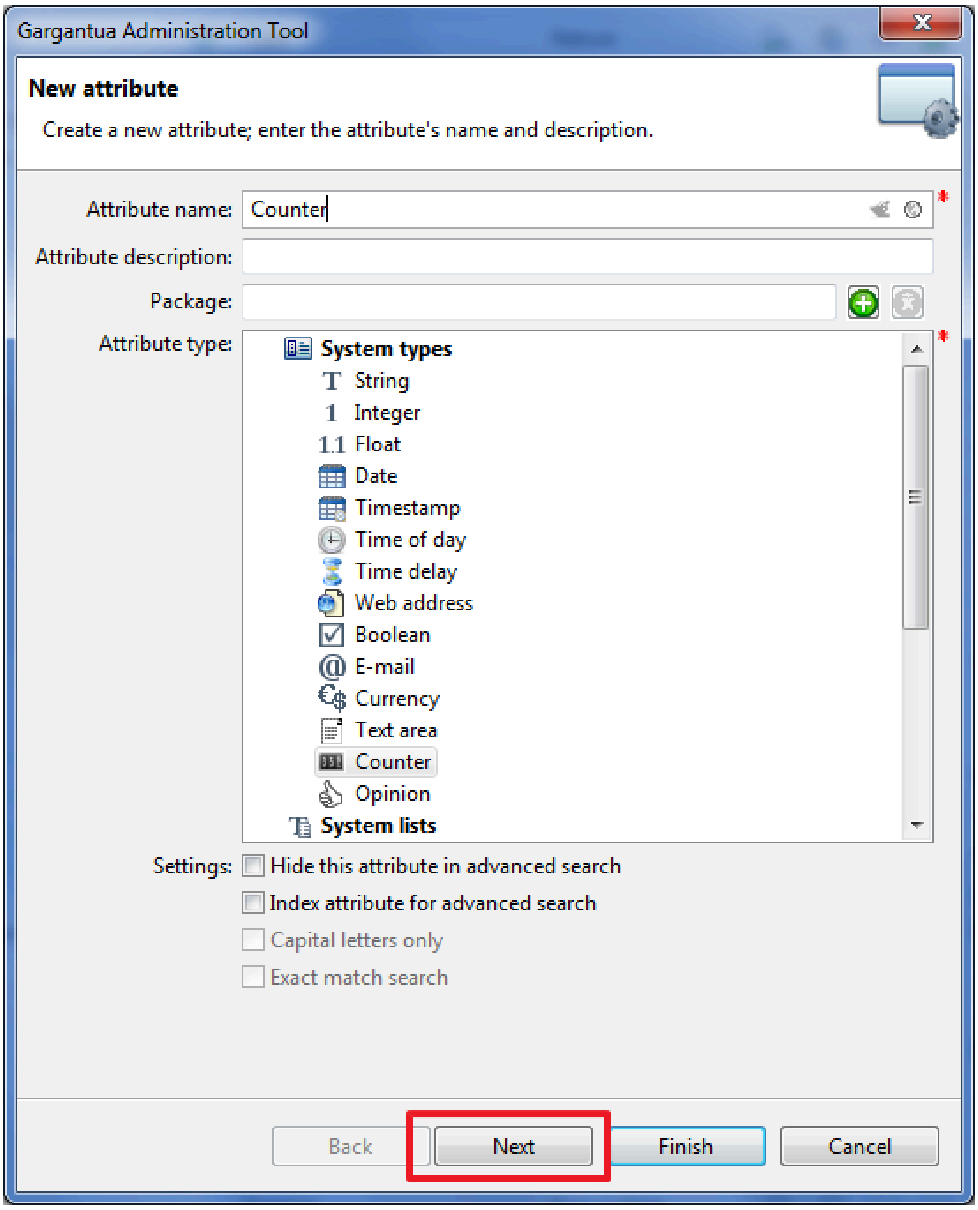
   The management screen of the new attribute displays.

4. In the dialog that displays, enter the **Attribute name** field and, if necessary, the **Description** field.
5. In the **Attribute type** field, select the most suitable option depending on the information to be stored.
6. If you want to index the attribute to speed up advanced searches that use it, check the **Index attribute for advanced search** checkbox.
7. When you are finished, click the **Add** button to close the dialog.

   The new attribute has been created: it now displays in the list.

ATTRIBUTE ADVANCED OPTIONS

Some attributes have advanced options that you can set at their creation. Once that you have selected one of the following attributes, the **Next** button of the **New attribute** dialog box becomes clickable, and allows you to access the attribute advanced options.



Currency attribute

1. Fill in the following fields:
    - **Currency** field: a three-letter international code: USD, EUR...;
    - **Precision** field: number of decimals allowed when entering amounts;
    - **Decimal separator** field: comma or point.
2. Click on **Finish**.

Counter attribute

1. Fill in the following fields:
   - **Start** field: counter starting figure, it is not mandatory to start with 1;
   - **Increment** field: counter increment between each added object. If the increment is 1, then the counter will go from 1 to 2, from 2 to 3, etc. as the objects are added;
   - **Reset** field: counter reset period: can be the maximum value, daily, weekly, etc. As soon as the counter reaches the indicated value, it starts all over again;
   - **Digits** field: number of figures that the counter can reach: if you choose 2, then the counter will not exceed the 99 number, if you choose 3, then the counter maximum value will be 999, etc. Choosing 0 allows you to have an almost infinite counter value, it is useful when you do not want the counter to be reset;
   - **Use padding** checkbox: the counter will always have the same number of figures as indicated in the **Figures** field. For instance, if you chose 3 digits and the counter has reached number 7, then it will be displayed as 007;
   - **The counter applies to folders/documents/processes** checkboxes: enables the counter attribute for created folders/documents/processes;
   - **Preserve existing value for an object in paste operations** checkbox: allows you to preserve the counter value for when you copy/paste a document/folder in another location. If you leave the checkbox empy, then the counter will have a new value.
2. Click on **Finish**.

Opinion attribute

1. Fill in the following fields:
   - **Review type** field: allows you to define the way of validating or reviewing a document: Yes/No, grade from 1 to 5, or 1 to 10. Or else, you can choose the **Custom** review type, that corresponds in reality to the customized lists created in the database. In a process **Reviewer** task, you will not be asked to validate or review a document, but instead, to choose an element from a customized list.

     For example, in the framework of a process in which users are asked to choose the ideal destination for a professional training course, users will be able to choose a city that is included in a customized list called Training course destination. Therefore, depending on all the user choices, the managers will decide of the ideal city for the training course.
2. Click on **Finish**.

Users/roles/groups list attributes

1. Fill in the following fields:
   - **No filter** field: no filter will be applied to the lists: all users, groups and roles will be suggested. This value is checked by default.
   - **Groups** field: enter the name of one or several group(s). Allows to restrain the list values

according to the group(s) entered. Only the users (for a Users list attribute) or roles (for a Roles list attribute) assigned to the group(s) entered will be suggested.

For example, if you choose to enter the Development group, only the users or roles assigned to the Development group will be suggested.

- **Roles** field: enter the name of one or several role(s). Allows to restrain the list values according to the role(s) entered. Only the users (for a Users list attribute) or groups (for a Groups list attribute) assigned to the role(s) entered will be suggested.

  For example, if you choose to enter the HR role, only the users or groups assigned to the HR role will be suggested.

- **Users** field: enter the name of one or several user(s). Allows to restrain the list values according to the user(s) entered. Only the groups (for a Groups list attribute) or roles (for a Roles list attribute) assigned to the user(s) entered will be suggested.

  For example, if you choose to enter user Peter Quinn, only the groups or roles assigned to Peter Quinn will be suggested.

- **Include also inherited assignments** checkbox: allows you to also include inherited asignments for users and groups, in a drop-down menu.
- **Custom** field: allows you to filter in a custom way the suggested content of a list, with the help of any regular expression.

  For example, for a group filter of a Users list, enter the expression "Service" so only the users assigned to the groups that include the word "Service" are suggested: finance service, accountability service, reception service, etc.

- **Label / Real name** checkboxes: the regular expression entered above will be only applied to the names of groups and roles, and real names for users.

2. Click on **Finish**.

E-mail templates list

1. Fill in the following field:
   - **Filter**: allows you to filter the content of an e-mail template list, with the help of a regular expression. Only the e-mail templates whose names match the regular expression will be suggested.

     Example 1: if you want your list to only display e-mail templates whose names contain "Aknowledgement of receipt", enter the expression "Aknowledgement of receipt".

     Example 2: if you want your list to only display e-mail templates whose names contain "Invoice" OR "Mail", enter the expression "Invoice|Mail".

If you do not fill the Filter field, then all the e-mail templates created in the E-mail templates branch will be suggested in the list.

Particularity: to run properly on Microsoft SQL Server, the admin must enter the following code in the console:

```
sp_configure 'show advanced options', 1;
sp_configure 'Ole Automation Procedures', 1;
sp_configure 'show advanced options', 1;
RECONFIGURE;
```

2. Click on **Finish**.

Attributes Management Screen – Available Tabs

The attributes management screen contains the following tabs:

- The **Attributes** tab allows you to manage all the GARGANTUA database attributes.
- The **Dependencies** tab allows you to know in which objects use each attribute is used.
- The **Summary** tab contains a summary of the information on all the GARGANTUA database attributes. The PDF version of the summary can be used as a reference about the GARGANTUA database attributes. It can be sent to users who do not have access to GARGANTUA Administration Tool.
- The **Log** tab allows you to view the list of all the operations performed on the GARGANTUA database attributes, and to filter them according to some criteria.
- The **Help** tab allows you to access the contextual help.

"Attributes" Tab

The **Attributes** tab of the attributes management screen contains the following options:

- **Group by type** - This checkbox allows you to sort the attributes by type (string, integer, date...). By default, attributes are listed in alphabetical order.
- **Hide system attributes** - This checkbox allows you to hide the system attributes. By default, they are visible.

The table listing the attributes contains the following columns:

- **Name** - This column indicates the attribute name.
- **Localized names** - This column indicates if the attribute name has been translated in at least one language (grey check mark) or in all available languages (green check mark). The attribute name translations will be visible in:
    - Forms with default layout mode (preview and Web Client);
    - Custom columns of display profiles;

    - Displayed attributes of Workflow inbox.
- **Type** - This column indicates the attribute type (string, integer, date...).
- **Nature** - This column indicates the attribute nature (system or non-system).
- **Hide this attribute in advanced search** - This checkbox allows you to hide an attribute in the advanced searches. By default, this checkbox is not checked and the attribute is available as a search criterion for the Web Client users.
- **Index attribute for advanced search** - This checkbox allows you to index the attribute in order to make the advanced searches using this attribute quicker. By default, this checkbox is not checked and the attribute is not indexed.

  > ***This option is useful if many objects have this attribute in their form.***

- **Capitals letters only** - This checkbox allows you to authorize only upper case when typing the attribute value in the Web Client. If the user uses lower case, it is automatically changed to upper case. By default, this checkbox is not checked and the original case is kept.
- **Exact match search** - This checkbox allows you to only authorize the **Equals** and **Is empty** operator for the attribute in the advanced searches. By default, this checkbox is not checked and all the operators are available.

  > ***This option is useful if many objects are indexed with this attribute, because the searches with the other operators can take a lot of time.***

- **Format** - This column indicates the other properties of the attribute, if any: for example, the currency and the number of precisions allowed for the attributes of currency type.
- **Description** - This column contains the attribute description (entered when creating it).

MODIFYING THE PROPERTIES OF AN EXISTING ATTRIBUTE

After creating an attribute, some of its properties can be modified: its name, its description, its availability among advanced search criteria, its indexation, and its limitation to upper case.

To modify the name or description of an attribute:

1. In the table with the attributes list, click the relevant box.

   The cursor is positioned in the box, which is now editable.

2. Make the modifications of your choice, and click outside the table.
3. In the bottom left corner of the right pane, click the **Apply** button.

   The name or description of the attribute have been modified.

To prevent an attribute from being used as an advanced search criteria:

1. In the **Hide this attribute in advanced search** column of the attributes list, check the checkbox corresponding to the attribute you want to hide.
2. In the bottom left corner of the right pane, click the **Apply** button.

   The attribute will not display anymore when setting up advanced searches. To make it display again, uncheck the checkbox.

To index an attribute :

1. In the **Index attribute for advanced search** column of the attributes list, check the checkbox corresponding to the attribute of your choice.

   A dialog informing that the operation might take time and that the database will be temporarily offline displays.

2. Click **Yes**.

   A clock icon replaces the checkbox until the end of the indexation.

3. In the bottom left corner of the right pane, click the **Apply** button.

   The attribute is now indexed. Advanced searches using this attribute will now be quicker.

To allow only upper case when typing an attribute's value:

1. In the **Capital letters only** column of the attributes list, check the checkbox corresponding to the attribute of your choice.
2. In the bottom left corner of the right pane, click the **Apply** button.

   When filling this attribute in the Web Client, the user will only be able to enter upper case letters.

Deleting an attribute

Reminder: the system attributes can never been deleted, neither can the attributes used in one or more versions of forms.

To delete an attribute, proceed as follows:

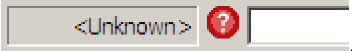
1. In the table with the attributes list, click the line corresponding to the attribute you want to delete.

   The line is highlighted.

2. In the bottom left corner of the right pane, click the **Delete** button.

   A confirmation message displays.

3. Click **OK**.
4. If the attribute is not used in any form, it disappears from the list: you are finished.

If the attribute is used only in one or more undeployed versions of forms, a warning message displays: click **OK** if you do want to delete the attribute; it will be labeled as unknown in the form where it was used: 

.

If the attribute is used in one or more deployed versions of forms, or if it is a system attribute, a message saying it cannot be deleted displays: click **OK** to close the dialog.

MERGING TWO ATTRIBUTES

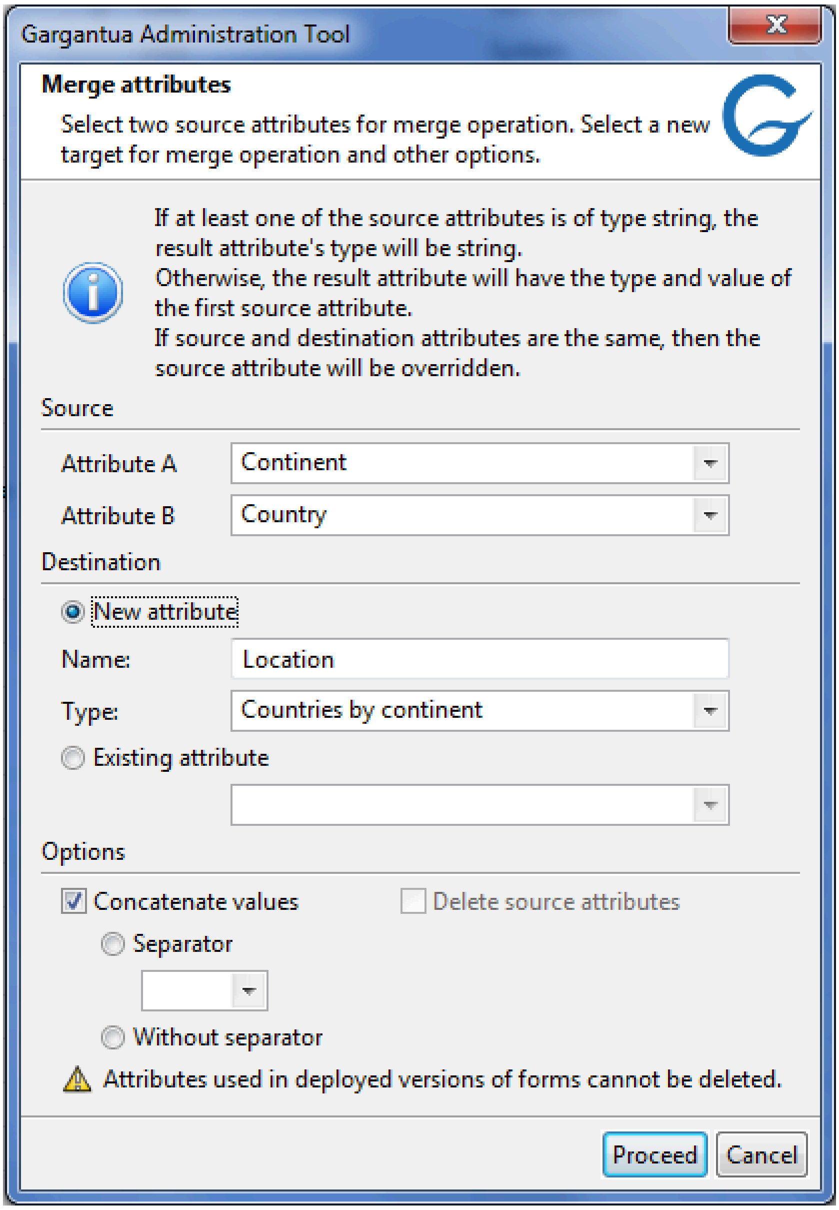
After using GARGANTUA for a while, you may realize you have created too many attributes and that some information could be aggregated: this is why the GARGANTUA Administration Tool allows you to merge two existing attributes in a third one, which will inherit all the values stored in the database for both merged attributes.

To merge two attributes, proceed as follows:

1. In the bottom left corner of the **Manage attributes** screen, click the **Merge** button.

   The **Merge attributes** dialog displays.

2. In the **Source** section, select both existing attributes you want to merge, with the help of the **Attribute A** and **Attribute B** drop-down lists.



3. In the **Destination** section, you need to set the attribute resulting from the merge. To do so, you may:
   - Create a **New attribute**: in this case, enter its name in the text field and select its type in the drop-down list; the attribute will be automatically created and added to the forms as a replacement for both source attributes when you complete this procedure;

     > ⚠ *If the new attribute relies on a custom list, the latter should have been created beforehand, from the **"Lists"** branch of the Administration Tool.*

   - Use an **Exist attribute**: in this case, select it in the drop-down list.

> *If, for a given object, there are values in databases at the same time for the source attributes and for the existing attribute chosen as a merge destination, the value stored for the destination attribute will be **overwritten and replaced** by the value(s) of the source attributes.*

4. In the **Options** section, you need to decide what the destination attribute will contain. You can check the **Concatenate values** checkbox to use the values of both source attributes in the destination attribute.

   > *If you do no check the **"Concatenate values"** checkbox, only the **"Attribute A"** value will be used in the destination attribute.*

5. If you have checked the the **Concatenate values** checkbox, you can:
   - Choose the **Separator** option, and select the character to be inserted in the corresponding drop-down list;
   - Choose the **Without separator** option: in this case, the values of the source attributes will be directly positioned one behind the other, without separator or space.
6. If the **Delete source attributes** checkbox is active, you can check it: the source attributes will then be completely erased from the database. Otherwise, they will be replaced by the destination attribute in the forms which currently use them, but they will remain available so as to be inserted in other forms in the future.

   > *The **"Delete source attributes"** option is available only if these attributes are not used in any deployed version of a form.*

7. When you are finished, click **Proceed** to close the dialog.

   A warning message displays.

8. Click **OK**.
9. If the source attributes are included in deployed forms, a new warning message appears: click **OK**.
10. Redeploy the form(s) concerned by the modification.

    The source attributes have been merged in the selected destination attribute.

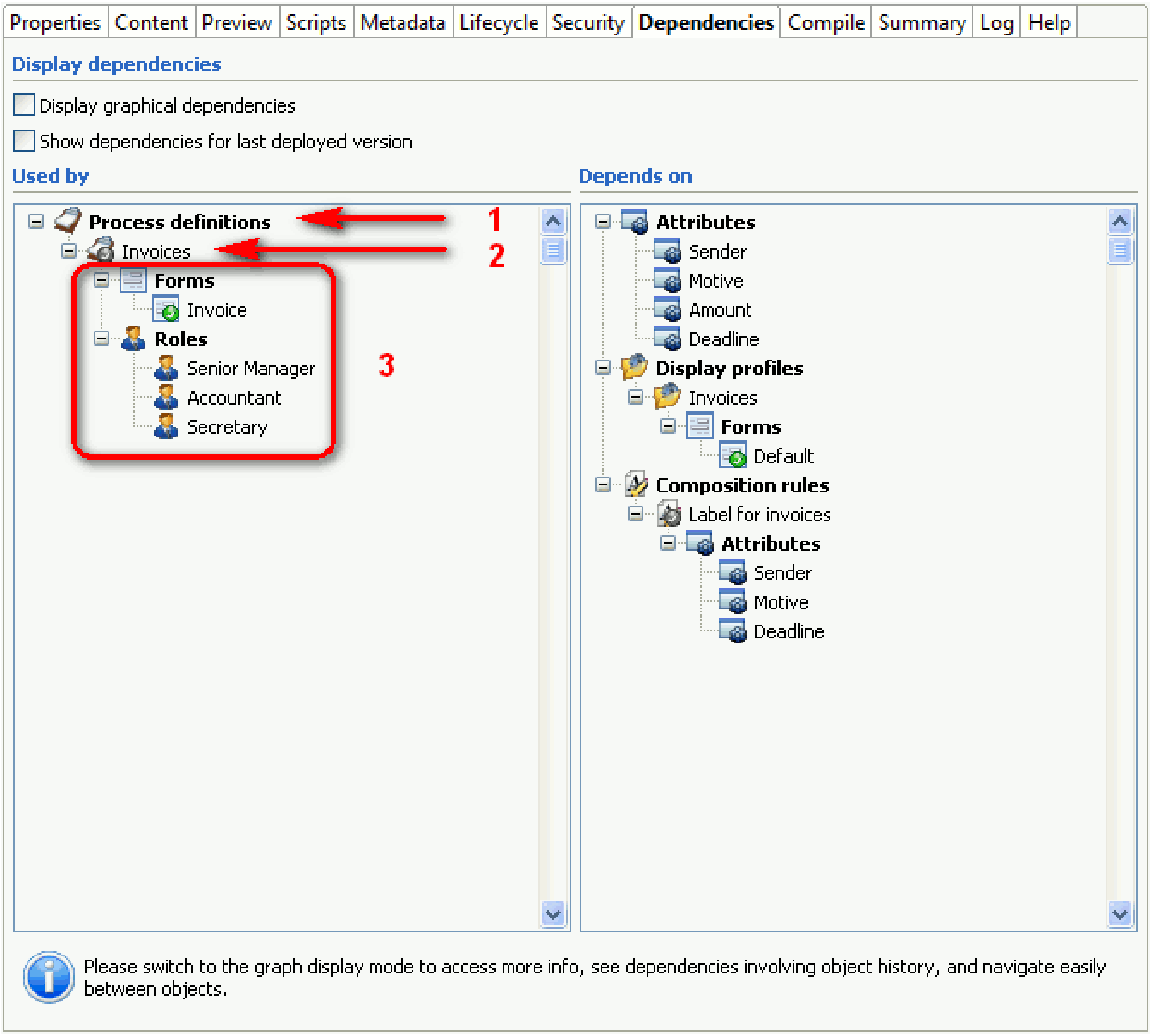
"Dependencies" tab

The **Dependencies** tab allows you to know which other objects rely on or are used by the current design object.

Displaying dependencies in list mode

By default, dependencies are displayed in **list mode** and the **working copies** of the objects are taken into account.

Depending on whether the current object is used by and/or relies on other objects, dependencies are displayed in 1 or 2 columns. If there are 2, the objects that rely on the current object are listed in the left column, and the objects that are used by the current object appear in the right column:



1. Some objects in this category have dependencies to the current object.
2. This object has a dependency to the current object, that is the “Invoices” process uses the “Invoice” form.
3. Here is the list of all objects that have a dependency to the “Invoices” process.

In the dependencies analysis screens as well as everywhere else in the interface, the icon indicates whether an object is currently deployed and, if so, whether the deployed version is identical to the working copy:

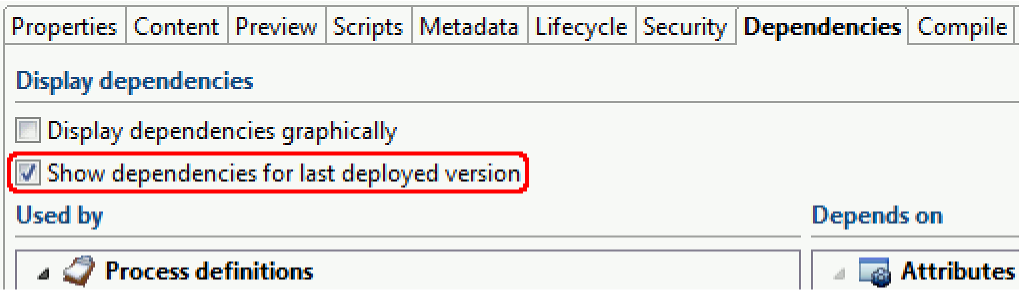
- No icon - The object is not deployed.
- - The object is deployed and there is no difference between its last deployed version and its working copy.

- - The object is deployed but its last deployed version is not identical to its working copy.

What is the "Show dependencies for last deployed version" option for?

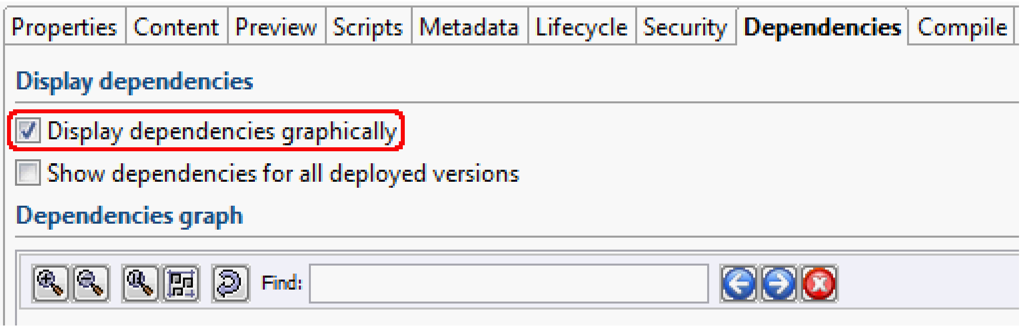
By checking the **Show dependencies for last deployed version** checkbox, you can choose to display the dependencies for the version of the object that is currently deployed, instead of the dependencies for the working copy.

This option is only available in list mode, for objects that support the **Deployment history** feature:

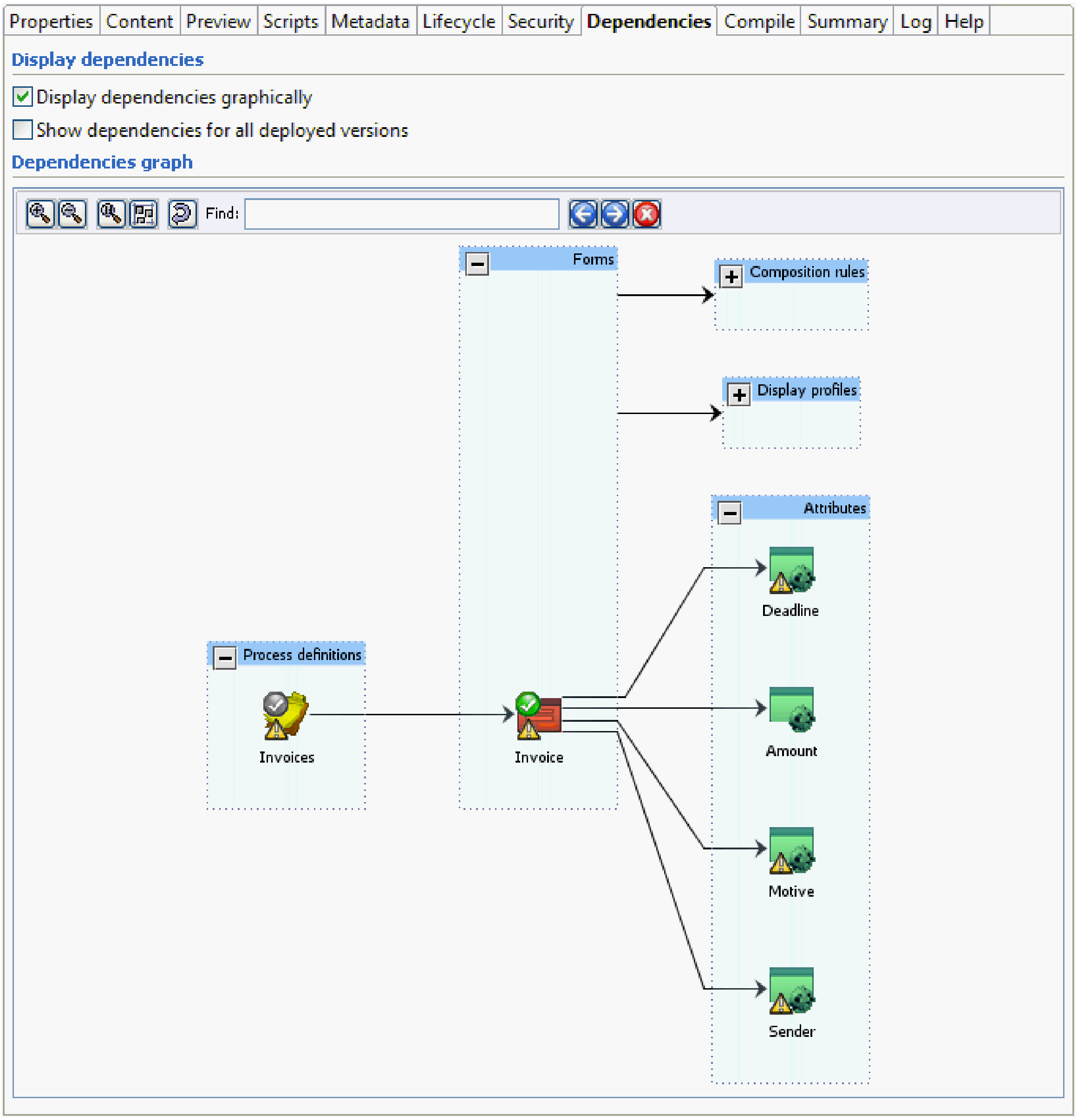


Displaying dependencies graphically

In order to switch from the list mode to the graphical display, check the **Display dependencies graphically** option:



The dependencies between the working copies of the various objects now take the form of a graph:



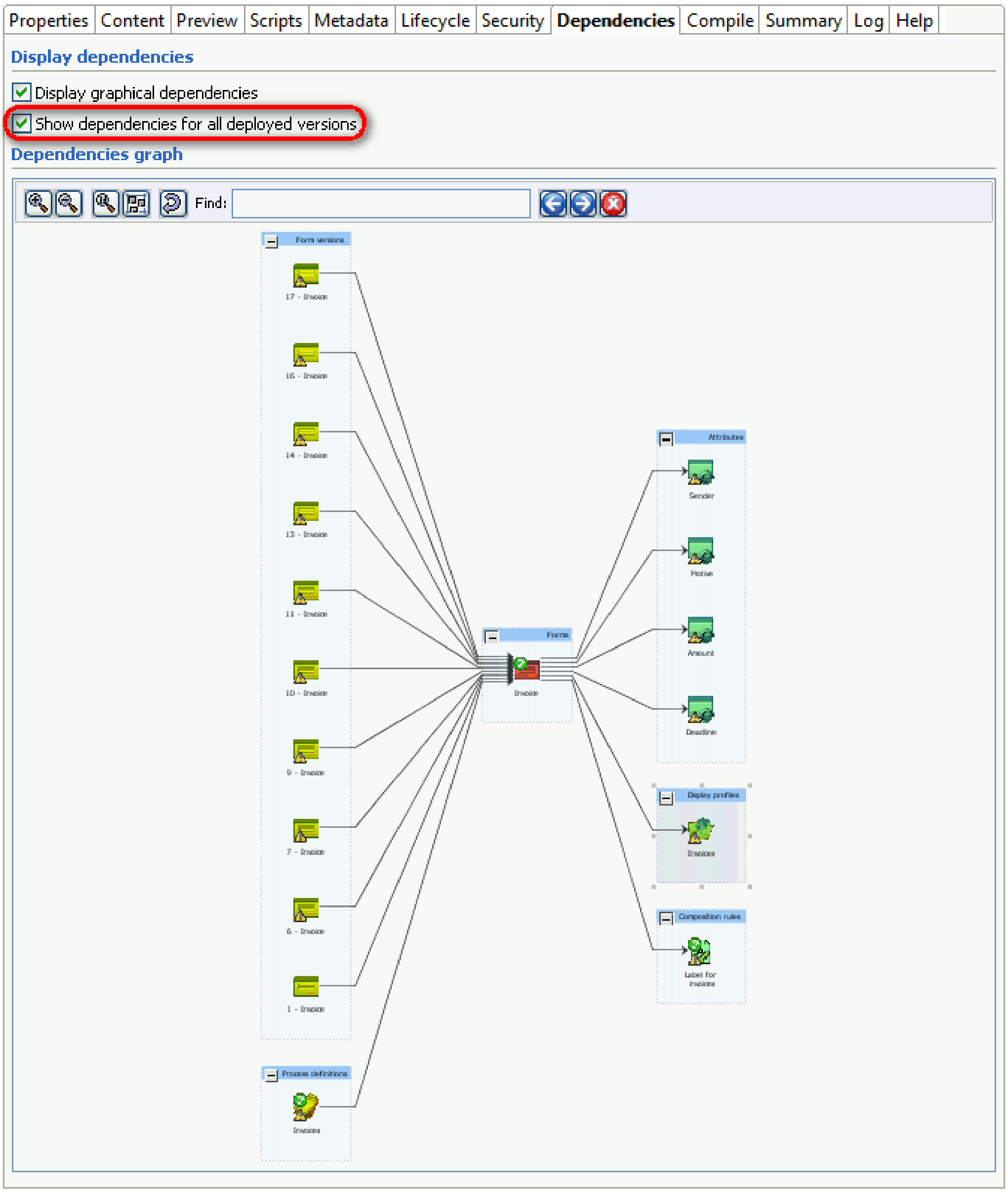
The toolbar above the graph allows you to:

- - Enlarge the graph;
- - Make the graph smaller;
- - Restore the default size for the graph;
- - Optimize the size of the graph;
- - Refresh the graph;
- Find: - Search the names of the objects in the graph for a particular string; the objects that match the search criterion are highlighted in pale blue;
- - - Navigate between the objects that contain the search string;
- - Reset the search results so that no more objects are highlighted.

What is the "Show dependencies for all deployed versions" option for?

If you check the **Show dependencies for all deployed versions** box, the dependencies graph will include all previously deployed versions of the objects, instead of just their working copies. If the current object supports the **Deployment history** function, then the list of all its previously deployed versions will also appear in the graph.

This option is only available when dependencies are displayed graphically:



"Log" tab

The **Log** tab allows you to view a list of all the operations performed in one of the branches of Gargantua Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

*You can also click on the **"Week audits"**, **"Month audits"**, **"Year audits"** and **"All audits"** icons, so as to view the operations performed in larger periods of time.*

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.
3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

*You can tick the **"Show login/logout events"** box to display the users connections and disconnections. This functionality is only available for the **"Users"** and **"Server log"** branches.*

*You can tick the **"Only Show error audits box"** to only display the failed operations.*

*The "**Reset**" button allows you to cancel the last filtering.*

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

Forms

Role and properties of the default form

When you create a new GARGANTUA database, a first **Default** form is automatically created and deployed, so that the Web Client users may immediately insert in the database some production objects labeled in a minimal way.

The **Default** form has only one attribute, the **label** attribute. Unless it has been set otherwise with **Display profiles**, the **Default** form is always suggested as a default form when adding a new production object to the database.

> ⚠ ***The "Default" form cannot be subjected to any operation and always keeps the status with which the system created it: for instance, it cannot be either deleted, modified, renamed, or undeployed.***

Creating a new form

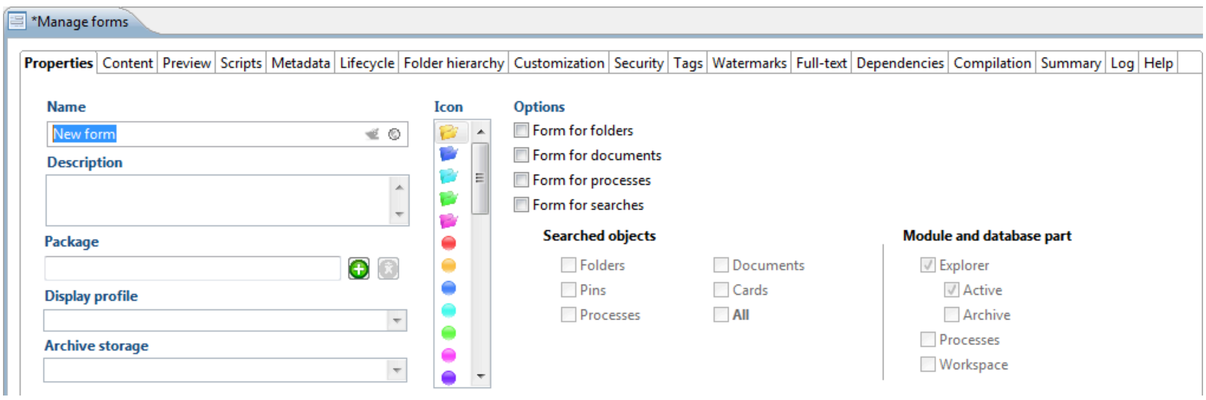
To create a new form containing different attributes and intended for a specific use, proceed as follows:

1. In the left pane of the Administration Tool, expand the sub-branch corresponding to the GARGANTUA database of your choice.
2. Click the **Forms** sub-branch.

   The **Manage forms** screen displays in the right pane.

3. In the bottom left corner of the right pane, click the **New** button.

   A new form is created and its management screen displays in the right pane.

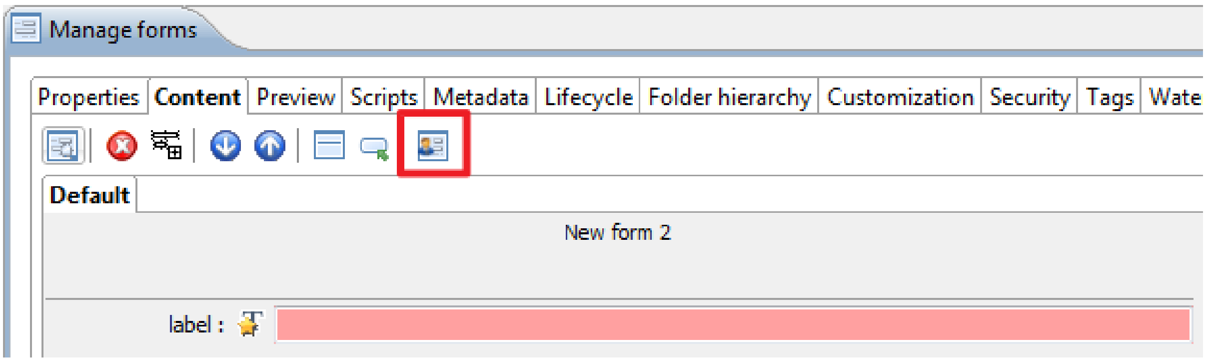


4. In the **Properties** tab, enter basic information about the form.
5. In the **Content** tab, use the **Convert to custom form layout** icon to switch to the custom form layout

mode for the form editing.

More complex, the custom form layout mode offers many additional options for the formatting and behavior of the form fields.

Once that you have enabled the custom form layout, you cannot come back to the default form layout.



6. Using the form editor, whether it be a default or custom form layout, set up the form.

The size of each form page is limited: if you notice your form does not display in the Web Client once deployed, try to delete some of the items it contains.

7. When you are finished, in the bottom left corner of the right pane, click the **Apply** button.

Your new form has been created: you can now modify it (by using again the same tools as to create it) and/or deploy it in order to make it available for the Web Client users.

FORM MANAGEMENT SCREEN – AVAILABLE TABS

The management screen of a form contains the following tabs:

- The **Properties** tab gathers the form main settings: name, description, icon, type...
- The **Content** tab allows you to specify the form attributes and layout.
- The **Preview** tab allows you to see how the form will display in GARGANTUA Web Client.
- The **Scripts** tab allows you to write scripts using the GARGANTUA API to get advanced custom features (for more information on form scripts, see the **Scripts** branch help).
- The **Metadata** tab allows you to fill automatically some attributes with the metadata of its associated file.
- The **Lifecycle** tab allows you to manage the evolution of the objects associated to the form.
- The **Folder hierarchy** tab allows you to associate a folder and sub-folder hierarchy to a form.
- The **Customization** tab allows you to customize the way the documents that use this form will be

displayed in the Web Client.

- The **Security** tab allows you to apply security profiles to the objects associated to the form.
- The **Tags** tab allows you to tag the documents associated to the form.
- The **Watermarks** tab allows you to apply watermarks to the files associated to the form.
- The **Dependencies** tab allows you to analyze the form dependencies, in order to know which objects use it and/or depend on it.
- The **Full-text** tab allows you to define full-text rules for the documents that use this form.
- The **Compilation** tab allows you to view the compiler messages and to know if some settings of the form might cause problems.
- The **Summary** tab contains a summary of the form information. The PDF version of the summary can be used as a reference document about the form design. It can be sent to users who do not have access to GARGANTUA Administration Tool.
- The **Log** tab allows you to view the list of all the operations performed on the form, and to filter them according to some criteria.
- The **Help** tab allows you to access the contextual help.

"PROPERTIES" TAB

The **Properties** tab of a form management screen contains the following fields:

Form name

In this field, enter a name for the form.

Description

In this field, you can enter a description for the form.

Package

In this field, you can add the form to a package.

Archive storage

In this drop-down list, select the storage area where objects with this form will be transferred after they have been **archived**, either manually or automatically with a lifecycle.

> ***It is possible to implement the automatic transfer of objects to one or more storage areas using the lifecycle. It is then recommended, when selecting a storage area in the "Archive storage" field, to make sure to be consistent with the storage areas selected for transfer operations in the lifecycle.***

Icon

If you want to use a specific icon to identify the production objects created with this form in GARGANTUA Web Client, click this icon in the list.

If you do not select anything, the default icon will be used: .

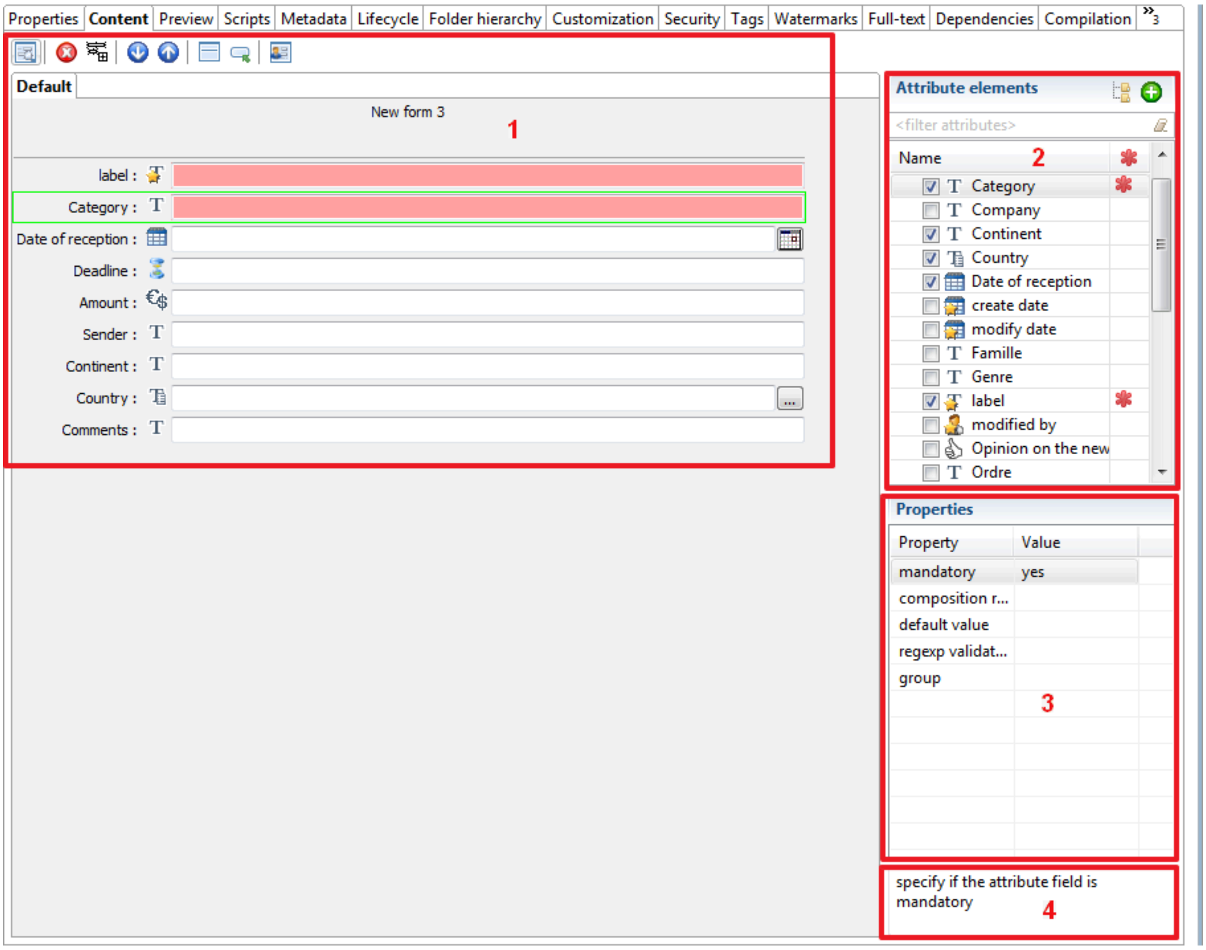
Options

In this section, check the checkboxes corresponding to the use intended for the form: Will it apply to EDM folders? Documents? Processes? Will it be available in the **Search with forms** utility?

"CONTENT" TAB

DEFAULT FORM LAYOUT MODE - STRUCTURE OF THE FORM EDITOR

In default form layout mode, the form editor is as follows:



1. Area allowing to format the form; the toolbar allows you to perform the following operations:
   - Display the form preview;
   - Delete the currently selected item;
   - Select all the items of the form;

> *To select several items, hold down the Ctrl or Shift key, and click the different items to be selected.*

  - Move down the currently selected item;
  - Move up the currently selected item;
  - Add a horizontal line; lines are always added at the bottom of the form;
  - Add a command button; the button behavior must be set up through a script;
  - Switch to custom form layout.

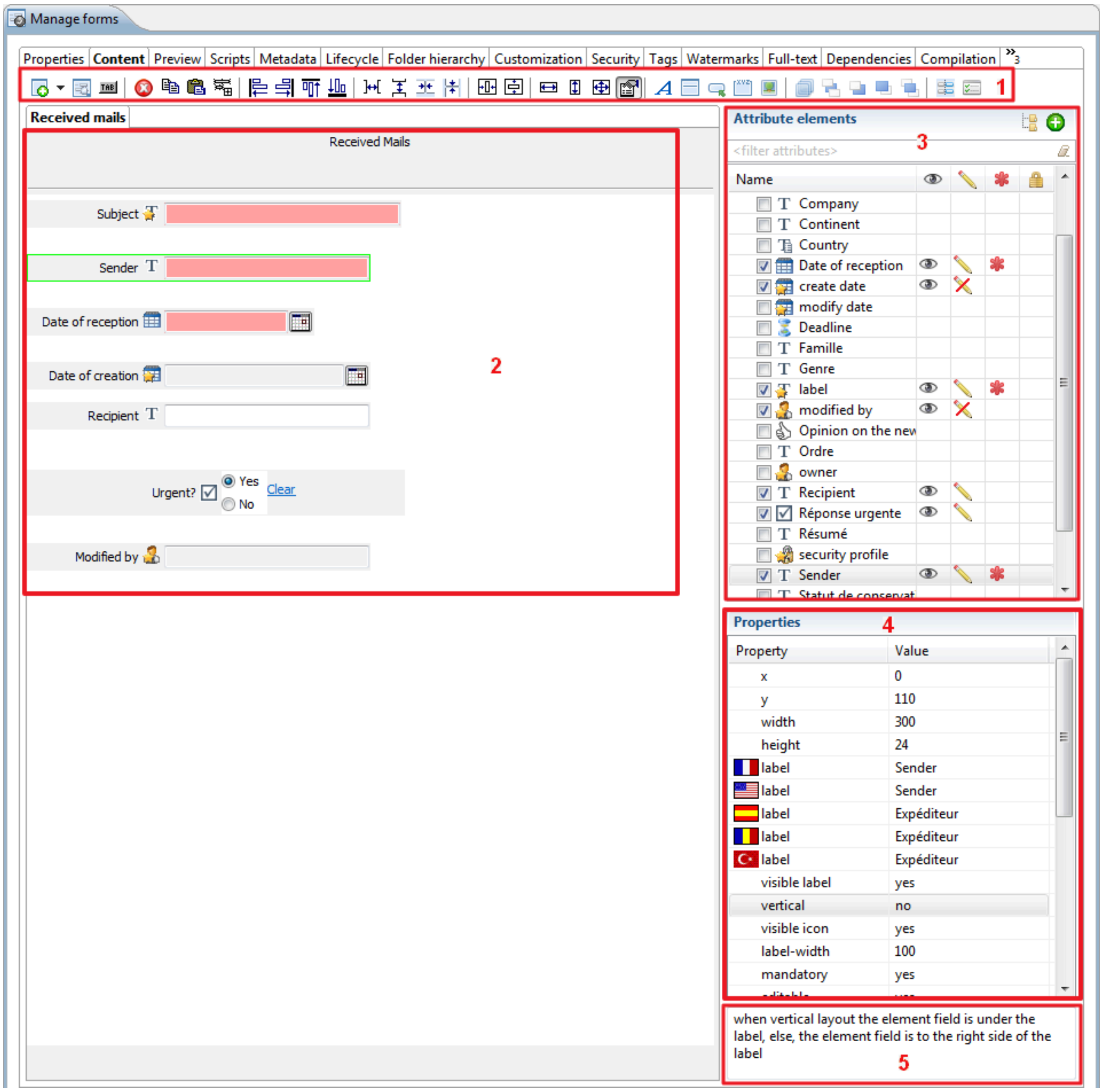
2. Checkboxes allowing to select the attributes to include.
   - Aggregate attributes by type (string, date, currency, etc.);
   - Create a new attribute;
   - <filter attributes> Filter attributes: enter the first letters of an attribute to find it. The rubber allows you to erase what has been entered in the field;
   - The icon next to an attribute indicates that the attribute is mandatory.
3. Area allowing to set attributes' properties;

   The properties displayed correspond to the attribute currently selected in the formatting area.

4. Explanatory text about the currently selected property.

CUSTOM FORM LAYOUT MODE - GENERAL LAYOUT OF THE FORM EDITOR

In custom form layout mode, the form editor is as follows:



1. Toolbar allowing to perform the following operations:
   - Add a new blank page to the form;

> ***Multi-page forms are helpful for Workflow processes: you can assign to each task a given page of the form, with a set of attributes and formattings adapted to the task.***

> *When adding a new page to a form, administrators are prompted to give the page a name and decide if it is the default page. The default page is the one that displays automatically when accessing the **"Content"** tab of the **"Manage forms"** screen. This page also displays by default for the creation of production objects in the GARGANTUA Explorer, and for all the Workflow tasks, if not set otherwise.*

Select the form page to be displayed and edited;

- Duplicate the current form page, with all its attributes and formattings; the new page is automatically added to the selection list and is named "xxx **(1)**";
- Delete the current form page;
- Modify the name of the current form page and/or give it the "default page" status;
- Organize form pages;
- Import form pages;
- Display the form preview;
- Define the order in which to switch from an item to another with the **Tab** key (see Tabstop property);

> *After clicking the tool, click the items of the form in the order of your choice and, when you are finished, click the tool again to come back to the form editing mode.*

- Delete the currently selected item;
- Copy the currently selected item in order to paste it on another form page;
- Paste the form item you have just cut;
- Select all the form items;

> *To select several items, hold down the Ctrl or Shift key, and click the different items to be selected.*

- Align the selected items on the left edge of the green-framed reference object;

> *If you use the Ctrl + click shortcut to select the objects to be aligned, the reference object will be the last object selected. Conversely, if you use the Shift + click shortcut to select the objects to be aligned, the reference object will be the first object selected.*

- Align the selected items on the right edge of the green-framed reference object;
- Align the selected items on the top edge of the green-framed reference object;

- Align the selected items on the bottom edge of the green-framed reference object;
- Make uniform spaces between the selected objects horizontally;
- Make uniform spaces between the selected objects vertically;
- Center horizontally the selected object(s);
- Center vertically the selected object(s);
- Make the selected object(s) of the same width as the green-framed reference object;
- Make the selected object(s) of the same heigth as the green-framed reference object;
- Make the selected object(s) of the same size as the green-framed reference object;
- Hide/display the areas located in the right column of the forms editor (**Attributes**, **Properties**);
- Add a text area;
- Add a horizontal line;
- Add a button; the button behavior must be set up through a script;
- Add a frame allowing to visually gather a set of attributes;
- Add an image frame to the form; then, you need to create the corresponding resource-image from the **Resources** branch of the Administration Tool, and to import it in the form using the **Image** property;
- Send the selected object to background, behind all the other objects of the form;
- Send the selected object back one level in the stacking order;
- Bring the selected object up one level in the stacking order;
- Bring the selected object to foreground, before all the other objects of the form.

2. Area allowing to format the form;
3. Checkboxes allowing to select the attributes to be inserted.
    - Aggregate attributes by type (string, date, currency, etc.);
    - Create a new attribute;
    - <filter attributes> Filter attributes: enter the first letters of an attribute to find it. The rubber allows you to erase what has been entered in the field;
    - The / icons next to an attribute indicate that the attribute is visible / invisible;
    - The / icons next to an attribute indicate that the attribute is editable / non editable;
    - The icon next to an attribute indicates that the attribute is mandatory;
    - The icon next to an attribute indicates that the attribute is locked.
4. Area allowing to set the form's properties and items; the properties displayed correspond to the item currently selected in the formatting area or to the form if you click an area where there is no item;
5. Explanatory text about the currently selected property.

SETTING THE FORM PROPERTIES AND THE ITEMS PROPERTIES

A large range of properties is available to configure the appearance and/or the behavior of the forms and their items.

To set up a property:

1. In the area allowing to format the form, click the item you want to configure or the form itself.

   A green frame displays around the selected item, if any.

2. In **Properties** table, in the **Value** column, click the box corresponding to the property you want to configure.

   The box turns into a drop-down list or a text field.

3. Select or enter the value of your choice, and click outside the box.

   The property has been configured: the new setting will be stored when saving the form.

Default form layout mode - Properties of attributes

In default form layout mode, the properties allowing to configure the attributes are the following:

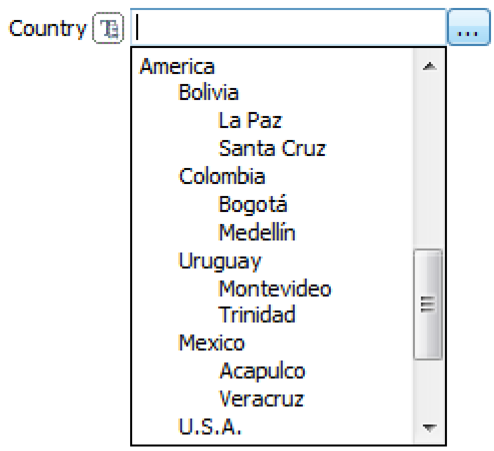
- **Mandatory**: This property allows you to specify if the Web Client user necessarily needs to fill out a value for this attribute, or if he can leave it blank.

  This property is available for all the non-system attributes. It gets implicitly the **Yes** value for the **label** system attribute.

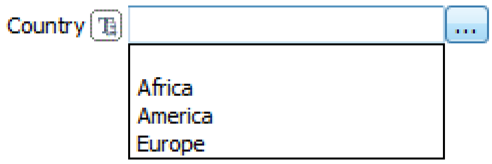
- **Closed**: This property is available for all the attributes of list type. It allows you to specify if the Web Client user necessarily needs to select one of the values already in the list, or if he is allowed to enter a new value.
- **List type**: This property allows you to specify the behavior of the attributes of list type:

  The **List type** property applies to all the attributes of list type but only the **as it is** and **multiple choice** values are available for the attributes based on the system lists.

  - **As it is**: The list is displayed in the Web Client as it has been created by the GARGANTUA administrator, with all its levels and sub-levels.

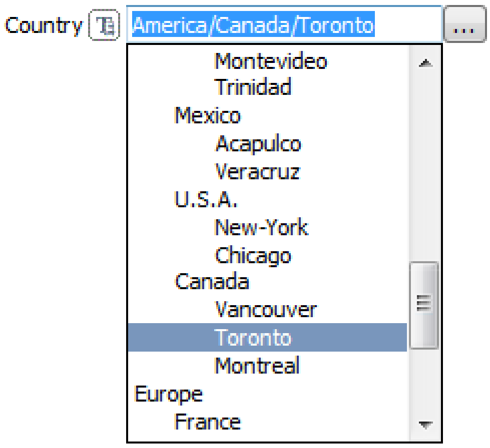


  - **1st level**: the values corresponding to the sub-levels of the list are hidden from the Web Client user.

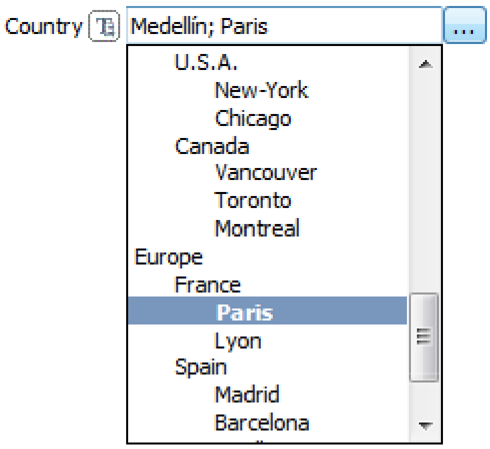


- **Full path**: When the Web Client user selects a value in a sub-level of the list, the items of the corresponding higher levels are added to the entry.

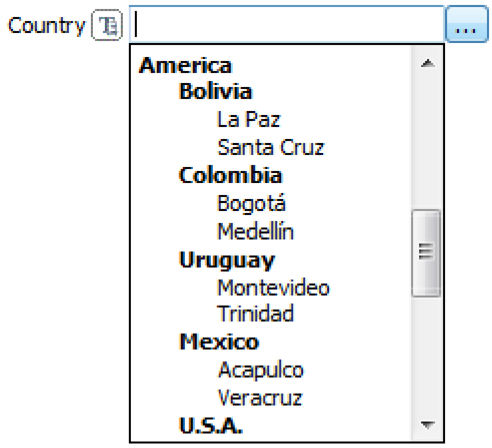
  Example: If a user selects "Toronto", the attribute automatically gets the "America/Canada/ Toronto" value; the corresponding object can be found through one of the three values when searching.



- **Multiple choice**: The Web Client user can select several values in the list.

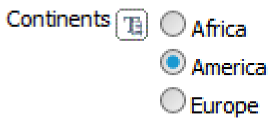


- **Category**: The list is displayed in the Web Client as it has been created by the GARGANTUA administrator, with all its top levels in bold. The bottom levels are displayed normally.



◦ **Multiline**: The list values are directly displayed over multiple lines in the Web Client, without having to click on the … button.

◦ **Radio buttons**: The list values are displayed as radio buttons, aligned vertically.



◦ **Inline radio buttons**: The list values are displayed as inline radio buttons, aligned horizontally.

- **Composition rule**: If composition rules have been created in the GARGANTUA database, this property allows you to select one, so that the value of the attribute is entered automatically each time a production object is created with the form.

  This property is available for the attributes of alphanumeric type, as well as for the custom lists (provided that the **Closed** property has the **No** value).

> *To display the list of the available composition rules, double-click the box corresponding to the* ***"Composition rule"*** *property in the* ***"Value"*** *column.*

- **Default value**: This property allows you to enter a value that will be displayed by default in the field of the attribute. When filling in the form, the user can either keep this value, or replace it by a different one.

- **Regexp validation**: This property allows you to enter a regular expression in a **string attribute**. When a user fills this field, he has to respect the rules stated by this regular expression. If the rules are not respected, then the form cannot be validated.

  Example: for an attribute called Name, you enter the following regular expression: ***[A-Z]****. *Thus, the users will have to enter capital letters. The name will therefore be entirely entered in capital letters.*

- **Link**: This property allows you to link the current attribute to another one, so that the values suggested for the current attribute are filtered according to the value previously selected for the other one.

- This property is available only for the attributes of custom list type and users/groups/roles lists, if at least two form attributes are based on the same list. In order to work properly, the list must have at least two levels.

Example:

In a GARGANTUA database, we create a "Geographic location" with names of continents, countries and cities, ranked on three levels. Afterwards, based on this list, we create three attributes, "Continent", "Country" and "City", then we insert them in a form. Finally, thanks to the Link property, we link the "Country" attribute with the "Continent" attribute and the "City" attribute with the "Country" attribute. Therefore, when a Web Client user selects the "Europe" value for the "Continent" field, only the part of the list corresponding to the European countries is suggested for the "Country" field and, when he selects "Italy" for the country, only the Italian cities are suggested for the "City" field.

Combining the Link property with the List type = 1st level option, the Web client user might only see the list items of "Continent" level when he fills in the "Country" field. As for the ***mandatory*** *and* ***closed*** *properties, it would be better to select the* ***yes*** *value for the "Continent" and "Country" attributes, so that the "Country" and "City" fields may always be filled in and in order to prevent wrong values from being entered.*

- **Autocomplete**: If this property is on: in a system list, a user who enters the first letters of a word will have all the list possible values that begin with these letters suggested. This property is only available for the attributes of a system list.

  Example:

  In a form, we have added a ***Roles*** *system list, that has all the roles available in the Administration tool. We find roles such as "Project Manager", "Developer", "Tester", "Translater". When the user enters the letter "t", the "Tester" and "Translator" roles will be suggested. If he enters the letters "tr", only the "Translator" role will be suggested.*

- **Lockable**: If this property is on, a checkbox is displayed near the attribute's field, when indexing a sub-package in Intelligent Capture. If this checkbox is checked, then the value filled in this camp will be displayed by default in this field, when indexing the next sub-package.

Custom form layout mode - Import form pages

In custom form layout, you can import pages from another form in the selected form:

1. Click on **Import form pages**.

   The Import form pages window is displayed, with the list of all the database forms.

2. Check the form pages that you want to import. If you check the form names in bold, all the pages of this form will be imported.
3. Check, optionally, the following checkboxes:
   - **Import and overwrite existing scripts**: when you import a page from form A to form B, that have at least one script in common, then the scripts of form A will be imported to form B and will overwrite the existing scripts.
     - **Comment existing scripts before overwriting**: the existing scripts will not be overwritten, but will be inserted as script comments.

       Only the scripts specific to the form attributes and buttons ("click", "change", "focus", ...) will be overwritten. The scripts specific to the form ("load", "common", ...) are not affected by this feature.

   - **Overwrite existing attribute labels**: when you import a page from form A to form B, that have at least one attribute in common, but two different labels, then the attribute label of form A will overwrite the same attribute label of form B.

     *For example, an attribute called **Date** has the label **Mail date** in form A, and the label **Mail date of reception** in form B. If you import form B to form A, then the **Mail date** label will be overwritten by **Mail date of reception**.*

4. Click on **OK**.

   You have imported pages of another form to the selected form.

Custom form layout mode - Advanced properties of attributes

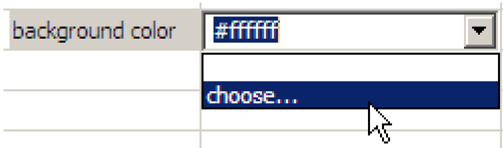
In custom form layout mode, the GARGANTUA administrators have the same properties as in default form layout mode, plus the following advanced properties:

- **x**: This property allows you to specify the distance from the left edge of the form (in pixels). It is available for all the form items.
- **y**: This property allows you to specify the distance from the top edge of the form (in pixels). It is available for all the form items.

- **Width**: This property allows you to set the width of the item in pixels. It is available for all the form items, and for the form itself.
- **Height**: This property allows you to set the height of the item in pixels. It is available for all the form items, and for the form itself.

> *You may also position and resize graphically the items after selecting them by clicking in the formatting area of the form.*

- **Printing page type**: This property allows you to select the format of the sheet to be used for the form printing: A2, A3, A4 or A5.
- **Background color**: This property allows you to set the color used for the form background. You can either enter the hexadecimal code of the color of your choice, or click **choose...** to use the color chart (chart dialog box).



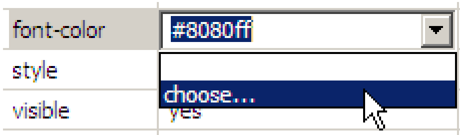
- **Label**: This property allows you to enter the accompanying text of the form items. It is available for the attributes, text areas and groups, in French, English, Spanish, Arabic, Romanian, Russian and Turkish.

> *The "label" property is especially available for the "label" system attribute. If you change its default value, choose an expression that helps the Web Client users identify easily the "label" attribute in the form: otherwise, the* ***"search in the label attribute"*** *feature will not be effectively used.*

- **Visible label**: This property allows you to hide the label text. It is available only for attributes.
- **Label-width**: This property allows to define the label width (in pixels). It is available only for attributes.
- **Vertical**: This property allows you to place the label text above the corresponding field (and not on the same line) or, for the boolean attributes, to display the alternative in the form of two radio buttons (instead of a checkbox). This property is only available for attributes.
- **Visible icon**: This property allows you to hide the icon indicating the type of each attribute; it is only available for attributes.
- **Font**: This property allows you to set the font face used for the item label: Arial, Times New Roman, Verdana... This property is only available for the items of area text and group type.
- **Font-size**: This property allows you to set the size used for the item label (in points). This property is available only for the items of text area or group type.
- **Font-weight**: This property allows you to set the weight to be used for the item label: in ascending order, **lighter** > **normal** > **bold** > **bolder**; the **inherit** option allows you to use for the label the same weight as for the parent HTML item. This property is available only for the items of text area or group type.

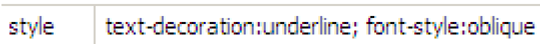
> ***The "lighter" and "bolder" values are not accepted by all the fonts; so they are respectively displayed as "normal" and "bold" values.***

- **Font-color**: This property allows you to set the color used for the item label. You can either enter the hexadecimal code of the color of your choice, or click **choose...** to use the color chart (chart dialog box). This property is only available for the items of text area and group type.

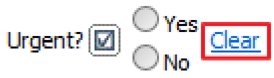


- **Horizontal alignment**: This property allows you to set the horizontal alignment of a label text: **left**, **center**, or **right**. This property is only available for the items of text area type.
- **Vertical alignment**: This property allows you to set the vertical alignment of a label text: **top**, **middle**, or **bottom**.

> ***This property is only available for the items of text area type. Setting this property does not modify the form appearance in the formatting area: the changes made at this level will only be visible in the Web Client.***

- **Style**: This property allows you to further refine the formatting of the items labels, using the CSS syntax; for example: 

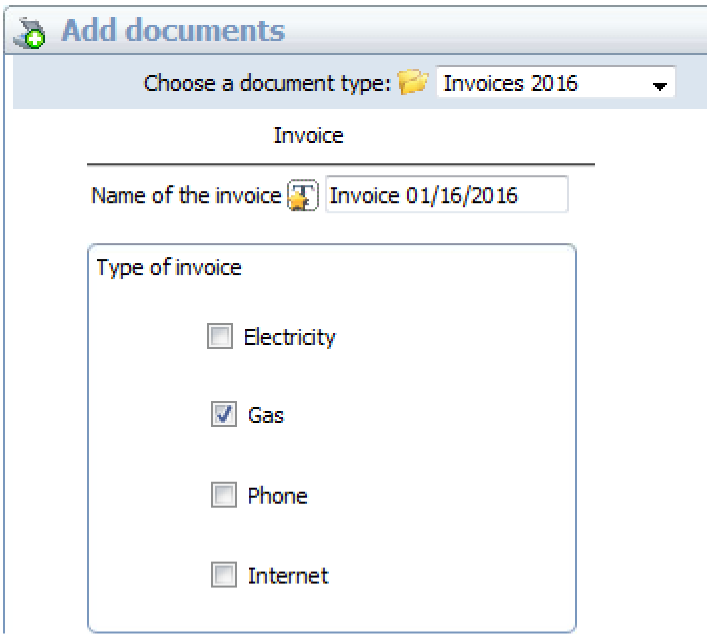
. This property is only available for the items of text area, group and image frame type.
- **Image source**: This property allows you to select the resource to be inserted in an image frame. It is only available for this attribute type.
- **Editable**: This property allows you to set whether or not a field is editable by the Web Client users: thus, you can protect a field entered automatically thanks to a composition rule, or allow the modification of a field on some pages of the form but not on the others. This property is available for all the items of attribute type.
- **Visible**: This property allows you to hide a form attribute to the Web Client users. For example, the attribute can be entered automatically with a script: then the information is contained in the form but is kept confidential; or the attribute can be hidden on some pages of the form but visible on others, so that, in a process, only the appropriate roles have access to some information. This property is available for all the items of attribute type.
- **Tabstop**: This property allows you to determine if an attribute will be stopped on when a user browses the attributes with the **Tab** key (see Custom form layout mode - General layout of the form editor). When this property is set to **yes**, the attribute will be stopped on. When it is set to **no**, the attribute will be skipped. By default, this property is set to **yes** for non-system attributes, and **no** for system attributes.
- **Reset**: When a boolean attribute displays as two radio buttons, this property allows you to display or hide the reset link of the two radio buttons. This property is only available for boolean attributes.



- **Group**: This property, combined with the Vertical property, allows you to enter a name of group for several boolean attributes displayed as checkboxes, in order to create a link between them. In this group, the choice will be exclusive: it will be possible to check only one checkbox.

> *The form needs to have at least two boolean attributes. These attributes must have the same name in their* ***"Group"*** *property, and their* ***"Vertical"*** *property must be set to* ***"no"****.*

For example, a company that files its invoices in a GARGANTUA database, wants to know their type when viewing their form attributes. Therefore, the company will create a form in which a frame called Type of invoice is displayed, and that includes several boolean attributes (Electricity, Gas, Phone, Internet). Then, the company will set their Vertical property to no, to turn them into checkboxes. Finally, the company will enter the same name of group (Invoice type) for each boolean attribute. Therefore, the user that files the invoices in the explorer will be able to select one and only one value among the four.



- **Width**: This property allows you to set the width of the line (in pixels) for the items of horizontal line type. It is only available for this attribute type.
- **Multiline**: This property allows you to display the content of the text fields on several lines, by inserting carriage returns; the value of the **height** property then determines the number of visible lines. The **multiline** property is available only for string attributes.
- **Grid URL**: This property allows you to import tables in the GARGANTUA forms. It is available only for the attributes of text area type.

Custom form layout mode - Shortcuts

In custom form layout mode, the following keyboard shortcuts are available:

Shift + Right arrow

Resize the selected item horizontally by +10 pixels.

Ctrl + Shift + Right arrow

Resize the selected item horizontally by +1 pixel.

Shift + Left arrow

Resize the selected item horizontally by -10 pixels.

Ctrl + Shift + Left arrow

Resize the selected item horizontally by -1 pixel.

Shift + Down arrow

Resize the selected item vertically by +10 pixels.

Ctrl + Shift + Down arrow

Resize the selected item vertically by +1 pixel.

Shift + Up arrow

Resize the selected item vertically by -10 pixels.

Ctrl + Shift + Right arrow

Resize the selected item vertically by -1 pixel.

Ctrl + C

Copy the selected items.

Ctrl + V

Paste the copied items on a different page of the same form.

Ctrl + A

Select all the items.

Del

Delete the selected items.

> *The “Label” attribute cannot be deleted.*

H

Align the selected items side-by-side horizontally.

V

Align the selected items side-by-side vertically.

L

Create a label for the selected item (see **Label**). The **Visible label** property is automatically set to **no**.

> ***This operation can only be performed on attribute items.***

P

Apply the current properties to all the selected items. The current properties are those of the last selected item. They display in the **Properties** frame.

T

Show/hide the Tab order working mode. The Tab order is the order in which to switch from an item to another with the **Tab** key. Tab order working mode allows you to change the Tab order of the form items. It hides the items that will be skipped when a user browses the attributes with the **Tab** key (see **Tabstop**).

Z

Show/hide the Z order working mode. This working mode allows you to change the stacking order of the form items (see the corresponding tools in Custom form layout mode - General layout of the form editor).

+

Change Z order: bring the selected item up one level in the stacking order.

Ctrl + +

Change Z order: bring the selected item to foreground, before all the other items of the form.

-

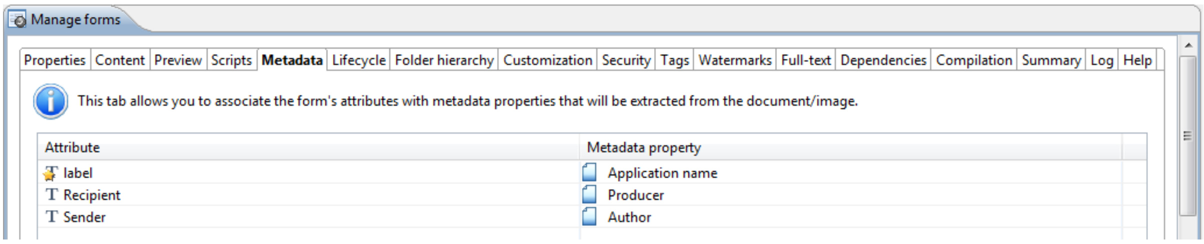
Change Z order: send the selected item back one level in the stacking order.

Ctrl + -

Change Z order: send the selected item to background, behind all the other items of the form.

“METADATA” TAB

In the **Metadata** tab, you can associate form attributes with the metadata (for example, the document title or author, the image width...) of the files uploaded with this form. When uploading files, the corresponding attributes will be automatically filled with the metadata.



- For images, only the files with the .jpg extension are supported.
- For documents, only the files with the .doc, .docx, .xls, .xlsx and .pdf extensions are supported.
- For mails, only the files with the .msg or .eml extensions are supported.

*To view a file’s metadata, right-click it, select **“Properties”**, and access the **“Summary”/ “Details”** tab.*

To associate form attributes with file metadata, proceed as follows:

1. In the management screen of the form of your choice, click the **Metadata** tab.

   The **Metadata** tab displays. The **Attribute** column lists all the compatible attributes in the form: they need to be of **String** or **Custom list** type.

2. In the **Attribute** column, locate an attribute to which you want to associate a metadata.
3. In the **Metadata** column, select in the drop-down list the metadata that will be used to fill the attribute. You can choose between image, document and mail metadata.
4. Click the **Apply** button.

   When uploading files with this form in the Web Client, the attributes will be automatically filled with the files’ metadata.

Mails particularity:

The Outlook and Thunderbird extensions to send mails to GARGANTUA do not support the automatic filling by metadata.

It is then necessary to save the mail in the extension of your choice (.msg or .eml.), from your mail client. Then, you will be able to import it in the Web Client, as if it was a normal file.

"FOLDER HIERARCHY" TAB

The **Folder hierarchy** tab allows you to associate a folder and sub-folder hierarchy to a form. Thus, when a folder that uses this form is created, this folder will be automatically integrated in the defined hierarchy. The folder hierarchy will be constituted of the different values used in this form.

Example:

*A company wishes to classify all of its received mails, in a **Received mails** database. The company wants its mails to be classified first by sender, then by arrival date, and finally by subject.*

*Then, the company will create a form that contains these attributes. After that, the company will create a folder hierarchy that gathers these attributes, in the following order: **Sender** / **Arrival date (month)** / **Arrival date (day)** / **Subject**.*

Thus, all the folders that will be created with the form will be classified according to this hierarchy.

By default, no hierarchy folder is associated to the form. You can:

- Create a hierarchy folder that will be applied to all the folders associated to the form;
- Set conditions that the attribute values must fulfill for a sub-folder to be created.

APPLY A FOLDER HIERARCHY TO THE FOLDERS ASSOCIATED TO THE FORM

To create and apply a folder hierarchy to the folders associated to the form:

1. In the form management screen of your choice, click on the **Folder hierarchy** tab.

   The **Folder hierarchy** tab is displayed.

2. Select the **This folder is always a hierarchical folder** option.

   It is in the table below this option that you will create the folder and sub-folder hierarchy associated to the form.

   > ***Checking the "User choice" checkbox will allow the user to choose whether he wants to use the folder hierarchy or not, when creating a folder with this form.***

3. Notice that a folder with the same name as the form is displayed under the **Root** folder.
4. To add and configure a sub-folder to the root folder or to the folder of the form, select the folder of your choice, then click on .

   The **Folder properties** dialog box is displayed.

5. Select the form you want to assign to the sub-folder, in the **Form** field.

6. Check optionally the **Copy attributes** checkbox, so all the attribute values of the sub-folder are displayed when a user checks its attributes.

7. Select one or several attributes that you want to use to create the sub-folder, in the left column of the **Composition rule definition** table.
8. Click on to transfer them to the right column.
9. Cliquez on **OK** to validate.

   The sub-folder is added under the first selected folder.

10. Repeat steps 4 to 8 for the other sub-folders, until you are done creating the folder hierarchy.
11. Click on **Apply**.

   You have created and applied a folder hierarchy to all the folders associated to the form.

APPLY FOLDER HIERARCHIES ACCORDING TO CONDITIONS

To configure conditions to fulfill to know whether a sub-folder should be created:

1. Double-click on a sub-folder of the folder hierarchy.

   The **Folder properties** dialog box is displayed.

2. To add a condition, click the button, at the right of the **Conditions** table.
3. In the **IF/NOT IF** column, select **IF** if the value has to be as described in the **Attribute**, **Operator** and **Value** columns, or **NOT IF** if the value must not be as described in these columns.
4. In the **Attribute** column, select the attribute which value will be checked.
5. In the **Operator** column, select the operator which will be used to relate the attribute and the value.
6. In the **Value** column, enter the value to use.
7. If you want to add another condition, click again the button, in the **AND/OR** column, select the **AND** or **OR** boolean operator to establish a relation with the previous condition, and repeat steps 4 to 9. Add as many conditions as needed.
8. Click **OK**.

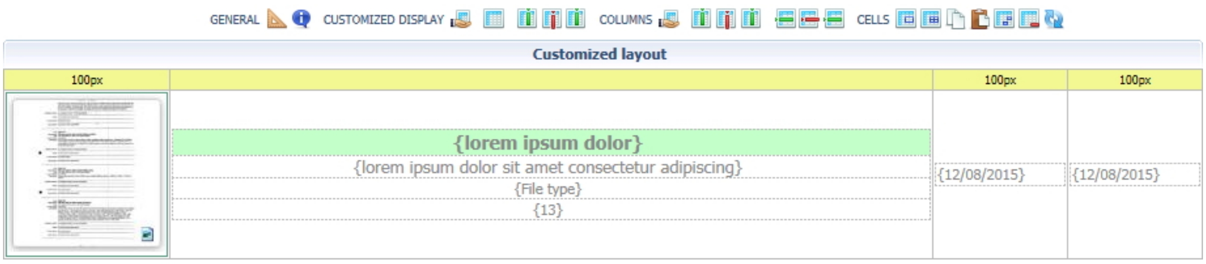
   The conditions created display in the table. You can delete them using the button.

   The conditions for creating the sub-folder have been applied to the sub-folder.

"CUSTOMIZATION" TAB

The **Customization** tab allows to customize the way the documents will be displayed in the Web Client. For this, it is possible to "fragment" the display in a table, in which you can fill the rows and columns with the attribute values that you want to be displayed in the Web Client: name, file format, date of creation, etc.

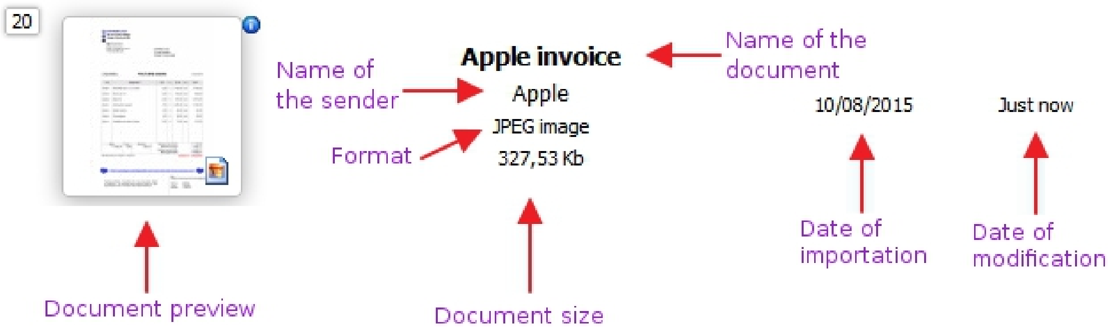
Below is an example of fragmentation:



Note here that the table is made up of four columns:

- The first column shows a **preview** of the document;
- The second column contains four rows, aligned at the centre of the column. Each row includes a different **attribute**:
    - First row: name of the document, in bold;
    - Second row: name of the sender;
    - Third row: document format;
    - Fourth row: document size.
- The third column shows the **date of importation** of the document in the database;
- The fourth column shows the date of the document **last modification**.

Below is the result of this customized display in the Web Client (the purple arrows and captions have been added):



You must enable the Display in custom mode option in the Web Client to display a document in the customized way. Otherwise, the document will be displayed in the standard way.

Display customization toolbar

The toolbar offers various possibilities to customize the display.

The toolbar icons allows you to perform the following actions:

General

- **Show/Hide markers**: click this icon to show/hide the table rows and columns. Showing them allows to customize them more easily; hiding them allows to view the display as it will be shown in the Web Client;
- **Legend**: click this icon to display the keyboard shortcuts list.

Customized layout

- **Customized display properties**: click this icon to show the display properties: events and number of columns;
- **Reset layout**: click this icon to delete the current layout and to go back to a blank table;
- **Insert column before**: click this icon to insert a column at the left of the table;
- **Delete column**: click this icon to delete the selected column;
- **Insert column after**: click this icon to insert a column at the right of the table.

Columns

- **Column properties**: click this icon to display the column properties: number of rows and cells, width, style, and vertical align;
- **Insert column before**: click this icon to insert a column at the left of the selected column;
- **Delete column**: click this icon to delete the selected column;
- **Insert column after**: click this icon to insert a column at the right of the selected column;
- **Insert a row above**: click this icon to insert a row above the selected row;
- **Delete row**: click this icon to delete the selected row;
- **Insert a row below**: click this icon to insert a row below the selected row.

Cells

- **Merge cells**: click this icon to merge two or more selected cells;
- **Undo merge cells**: click this icon to undo the merger of the selected cells;
- **Copy cell**: click this icon to copy the selected cell;
- **Paste cell**: click this icon to paste a cell;
- **Select merged cells**: click this icon to select the cell containing the merged cells (you need to be in the column containing these cells before using this option);

- **Reset cells**: click this icon to delete the content of the selected cell;
- **Randomize cells content**: click this icon to change the random text that is shown in the table preview.

CREATING THE CUSTOMIZED TABLE

When you open the **Customization** tab of any form, a default layout is already configured as a table. You can choose to customize the display from this default layout, or start a new one from a blank table.

- To start the layout from a blank table, click the **Reset layout** button in the toolbar.
- Then, use the toolbar options to create or change your table: add columns, cells, etc.
- Finally, configure each element of the table: choose a font, a background color, an icon, etc.

CONFIGURING THE CUSTOMIZED TABLE

Once you have created the structure of your table, you can configure its columns and cells.

> ***Before configuring your table, make sure of displaying the markers. The markers allows to show the location of the table elements.***

- To configure a column:

1. Select the column that you want to configure, by clicking the top yellow line.

   All the column rows are highlighted. A table appears at the bottom of the right pane.

   Properties - [Column]

rows	8		
cells	3		
width	1000	vertical align	
style			

2. Fill in the fields of the table:

   - **Rows**: field automatically filled, depending on the number of rows inserted in the column;
   - **Cells**: field automatically filled, depending on the number of cells (or sub-columns) inserted in the column;
   - **Width**: width of the column. Can be expressed in pixels or percentages. You can choose a value, or click the field to open a list of the possible values;
   - **Vertical align**: vertical alignment of the column content, in relation to the content of the biggest column. The alignment can be done at the top, middle or bottom of the column;

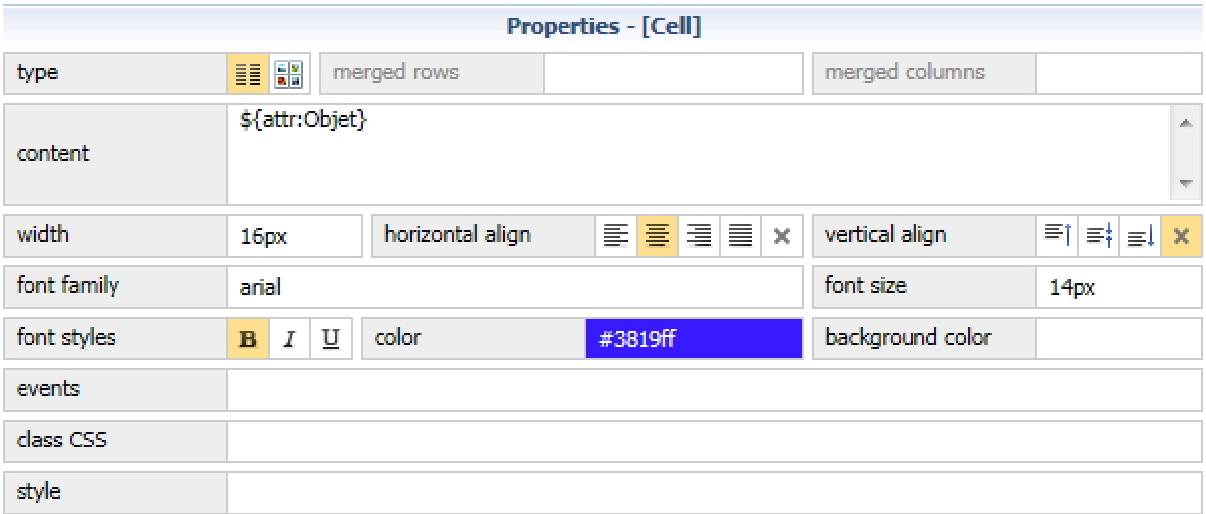
- **Style** : CSS style of the column.

  You have configured a column.

- To configure a cell:

1. Select the cell that you want to configure.

   The cell is highlighted. A table appears at the bottom of the right pane.



2. Fill in the fields of the table:

   - **Type**: choose to display a text or an image in the cell. The image or the text must then be added in the **Content** field;
   - **Merged rows**: field automatically filled, depending on the number of merged rows to create the cell;
   - **Merged columns**: field automatically filled, depending on the number of merged columns to create the cell;
   - **Content**:
     - Text: the text can be free, or can be an attribute value. To choose the attribute, click the field to open a list of the available attributes;
     - Image: the image can be a preview of the document, a server resource or one of the available icons in the list. To choose the image, click the field to open a list of the available images;
   - **Width**: width of the column. Can be expressed in pixels or percentages. You can choose a value, or click the field to open a list of the possible values;
   - **Horizontal align**: alignment of the cell content. Can be aligned on the left, right, centered or justified;
   - **Vertical align**: vertical alignment of the cell content. Can be aligned at the top, bottom or centre;
   - **Font family**: font of the cell content;
   - **Font size**: size of the font;

- **Font styles**: style of the font (bold, italic or underlined);
- **Color**: color of the font;
- **Background color**: background color of the cell;
- **Events**: JavaScript event of the cell;
- **Class CSS**: CSS class of the cell;
- **Style**: CSS style of the cell.

  You have configured a cell.

- Once that you have finished configuring your table, click on **Apply**, then on **Deploy**.

"SECURITY" TAB

By default, there is no security profile applied to the form. You can:

- Always apply the same security profile to the form;
- Set conditions that attributes' values will need to meet in order to determine the security profile.

> *You can also apply security profiles to documents automatically according to the criteria of your choice in the **"Lifecycle"** tab. Make sure that the security profiles applied in the **"Security"** tab are consistent with those applied in the **"Lifecycle"** tab.*

APPLYING A SECURITY PROFILE TO ALL THE OBJECTS ASSOCIATED TO THE FORM

To always apply the same security profile to the form, proceed as follows:

1. In the management screen of the form of your choice, click the **Security** tab.

   The **Security** tab displays.

2. Select the **The form is** option.
3. Select the **Always associated to the same security profile** option.

   The **Security profile** drop-down list displays.

4. Select the security profile that will apply to the objects associated to the form.
5. Click the **Apply** button.

   The security profile has been applied to the form.

APPLYING SECURITY PROFILES ACCORDING TO CONDITIONS

To set conditions to meet in order to determine the security profile, proceed as follows:

1. In the management screen of the form of your choice, click the **Security** tab.

   The **Security** tab displays.

2. Select the **Associated to one or more security profiles according to defined criteria** option.

   A table displays.

3. To add a condition, click the button.

   The **Security profiles conditions** dialog displays.

4. In the **Security profile** drop-down list, select the security profile for which you want to set a condition.
5. If you want the security profile to also apply to the sub-folders and/or documents contained in the folder or pin associated to the form, check the **Recursive** checkbox.
6. In the **IF/NOT IF** column, select **IF** if the value has to be as described in the **Attribute**, **Operator** and **Value** columns, or **NOT IF** if the value must not be as described in these columns.
7. In the **Attribute** column, select the attribute which value will be checked.
8. In the **Operator** column, select the operator which will be used to relate the attribute and the value.
9. In the **Value** column, enter the value to use.
10. If you want to add another condition, click again the button, in the **AND/OR** column, select the **AND** or **OR** boolean operator to establish a relation with the previous condition, and repeat steps 4 to 9. Add as many conditions as needed.
11. Click **OK**.

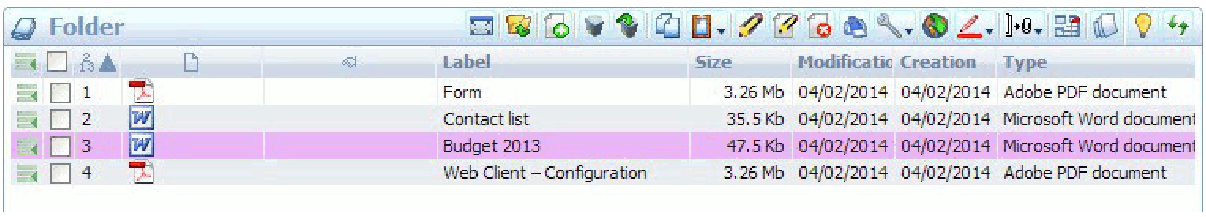
    The conditions created display in the table. You can modify them using the button or delete them using the button.

12. Click the **Apply** button.

    The security profiles has been applied to the form.

“TAGS” TAB

The **Tags** tab allows you to apply a background or font color to the documents associated to the form. In GARGANTUA Web Client, the tag applied will be visible in the documents list, on the document's row or thumbnail:



By default, the documents that use a form are not tagged. You can:

- Always apply the same tag to the documents associated to the form;

- Set conditions that attributes values will need to meet in order to determine the tag to apply.

> ***You can also apply tags to documents automatically according to the criteria of your choice in the "Lifecycle" tab. Make sure that the tags applied in the "Tags" tab are consistent with those applied in the "Lifecycle" tab.***

Applying a tag to all the documents associated to the form

To always apply the same tag to the documents using the form, proceed as follows:

1. In the management screen of the form of your choice, click the **Tags** tab.

   The **Tags** tab displays.

2. Select the **Documents using this form are** option.
3. Select the **Always marked with the same tag** option.

   The **Tag** drop-down list displays.

4. Select the tag that will apply to the documents using this form.
5. Click the **Apply** button.

   The tag has been applied to the documents using this form.

Applying tags according to conditions

You can set different styles to the documents indexed with the form, according to the value of some of their attributes.

Example: For "Invoice" documents, if the "Reminder" attribute contains "Yes", the document line will display in red. Otherwise, it will display in green.

Proceed as follows:

1. In the management screen of the form of your choice, click the **Tags** tab.

   The **Tags** tab displays.

2. Select the **Documents using this form are** option.
3. Select the **Marked with one or more tags according to defined criteria** option.

   A table displays.

4. To add a condition, click the button.

   The **Tags conditions** dialog displays.

5. In the **Tag** drop-down list, select the tag for which you want to set a condition.

6. In the **IF/NOT IF** column, select **IF** if the value has to be as described in the **Attribute**, **Operator** and **Value** columns, or **NOT IF** if the value must not be as described in these columns.
7. In the **Attribute** column, select the attribute which value will be checked.
8. In the **Operator** column, select the operator which will be used to relate the attribute and the value.
9. In the **Value** column, enter the value to use.
10. If you want to add another condition, click again the button, in the **AND/OR** column, select the **AND** or **OR** boolean operator to establish a relation with the previous condition, and repeat steps 4 to 9. Add as many conditions as needed.
11. Click **OK**.

    The conditions created display in the table. You can modify them using the button or delete them using the button.

12. Click the **Apply** button.

    The tags have been applied to the documents using this form.

"Watermarks" tab

The **Watermarks** tab allows you to set one or more watermarks (image added over the printed file) for the form. These watermarks will be automatically applied to the files associated to the form. By default, the files associated to the form do not have any watermark.

You can:

- Always apply the same watermark to the files associated to the form;
- Set conditions that attributes values will need to meet in order to determine the watermark to apply.

*You can also apply watermarks to files automatically according to the criteria of your choice in the **"Lifecycle"** tab. Make sure that the watermarks applied in the **"Wartermarks"** tab are consistent with those applied in the **"Lifecycle"** tab.*

Applying a watermark to all the files associated to the form

To apply the same watermark to all the files associated to this form, proceed as follows:

1. In the management screen of the form of your choice, click the **Watermarks** tab.

    The **Watermarks** tab displays.

2. Select the **Documents using this form are** option.
3. Select the **Always marked with the same watermark** option.

    The **Watermarks** drop-down list displays.

4. Select the watermark that will apply to the objects associated to the form.
5. Click the **Apply** button.

   The watermark has been applied to the files associated to this form.

APPLYING WATERMARKS ACCORDING TO CONDITIONS

To set the conditions to meet in order to determine the watermark to apply, proceed as follows:

1. In the management screen of the form of your choice, click the **Watermarks** tab.

   The **Watermarks** tab displays.

2. Select the **Documents using this form are** option.
3. Select the **Marked with one or more watermarks according to defined criteria** option.

   A table displays.

4. To add a condition, click the button.

   The **Watermarks conditions** dialog displays.

5. In the **Watermark** drop-down list, select the watermark for which you want to set a condition.
6. In the **IF/NOT IF** column, select **IF** if the value has to be as described in the **Attribute**, **Operator** and **Value** columns, or **NOT IF** if the value must not be as described in these columns.
7. In the **Attribute** column, select the attribute which value will be checked.
8. In the **Operator** column, select the operator which will be used to relate the attribute and the value.
9. In the **Value** column, enter the value to use.
10. If you want to add another condition, click again the button, in the **AND/OR** column, select the **AND** or **OR** boolean operator to establish a relation with the previous condition, and repeat steps 4 to 9. Add as many conditions as needed.
11. Click **OK**.

    The conditions created display in the table. You can modify them using the button or delete them using the button.

12. Click the **Apply** button.

    The watermarks have been applied to the files associated to this form and which meet the defined conditions.

"FULL-TEXT" TAB

The **Full-text** tab allows you to define full-text rules for documents that use the selected form. This tab also allows you to configure the default action of the Web Client for indexing documents in full-text.

> ***In order to apply full-text rules or the Web client default action, you must activate the Full-text feature at the database level.***

To define the Web client default action for indexing documents in full-text:

1. In the management screen of the form of your choice, click on the **Full-text** tab.
2. Check the default action you want to assign to the Web client, under the Conditions table:
    - **Index documents content**: documents that use the selected form are, **by default**, indexed in full-text.
    - **Do not index documents content**: documents that use the selected form are, **by default**, not indexed in full-text.
    - **Allow user to decide**
        - **Default index documents**: user can choose to index or not documents in full-text, but the **Prepare for content search** will be checked by default.
        - **Default do not index documents**: user can choose to index or not documents in full-text, but the **Prepare for content search** checkbox will not be checked by default.
3. Click on **OK**, then on **Deploy** or **Redeploy**.

   You have defined the Web client default action for indexing documents in full-text.

Indexing documents in full-text according to conditions

To create a full-text condition:

1. In the management screen of the form of your choice, click on the **Full-text** tab.
2. Click on ⊕, at the right of the conditions table.

   The Full-text conditions window opens.

3. Check the action to associate to the condition that you want to create:
    - **Index documents content**: documents that use the selected form are indexed in full-text, if the condition is fulfilled.
    - **Do not index documents content**: documents that use the selected form are not indexed in full-text, if the condition is fulfilled.
    - **Allow user to decide**
        - **Default index documents**: user can choose to index or not documents in full-text, if the condition is fulfilled, but the **Prepare for content search** checkbox will be checked by default.
        - **Default do not index documents**: user can choose to index or not documents in full-text, if the condition is fulfilled, but the **Prepare for content search** checkbox will not be checked by default.
4. Click on ⊕, at the right of the Conditions table, to add a condition.

   A new condition is added in the table.

5. In the **IF/NOT IF** column, select **IF** if the value has to be as described in the **Attribute**, **Operator** and **Value** columns, or **NOT IF** if the value must not be as described in these columns.
6. In the **Attribute** column, select the attribute which value will be checked.
7. In the **Operator** column, select the operator which will be used to relate the attribute and the value.
8. In the **Value** column, enter the value to use.
9. If you want to add another condition, click again the button, in the **AND/OR** column, select the **AND** or **OR** boolean operator to establish a relation with the previous condition, and repeat steps 4 to 9. Add as many conditions as needed.
10. Click **OK**.

    The conditions created display in the conditions table. You can delete them using the button.

11. Click on **Save**, then **Deploy** or **Redeploy**.

    Full-text conditions have been created and associated to documents that use the selected form.

"SUMMARY" TAB

The **Summary** tab allows you to display a summary of an item that presents its main features, like its manager, form, priority, content, etc.

The **Summary** tab is particularly helpful to have a general insight of the item, without having to browse through each tab.

The **Summary** tab also has a saving option in PDF format, which allows to view the summary of an item without the GARGANTUA Administration tool.

"LOG" TAB

The **Log** tab allows you to view a list of all the operations performed in one of the branches of GARGANTUA Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

*You can also click on the **"Week audits"**, **"Month audits"**, **"Year audits"** and **"All audits"** icons, so as to view the operations performed in larger periods of time.*

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.
3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

*You can tick the **"Show login/logout events"** box to display the users connections and disconnections. This functionality is only available for the **"Users"** and **"Server log"** branches.*

*You can tick the **"Only Show error audits box"** to only display the failed operations.*

*The **"Reset"** button allows you to cancel the last filtering.*

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

Deploying a form

When you are satisfied with a form you have just created or modified, you need to (re)deploy it so that your work will be taken into account in the Web Client.

Proceed as follows:

1. In the right pane of the Administration Tool, at the bottom of the form management screen, click the **Compilation** button in order to check that your form does not contain any error likely to prevent its deployment.

   The **Compile** tab displays.

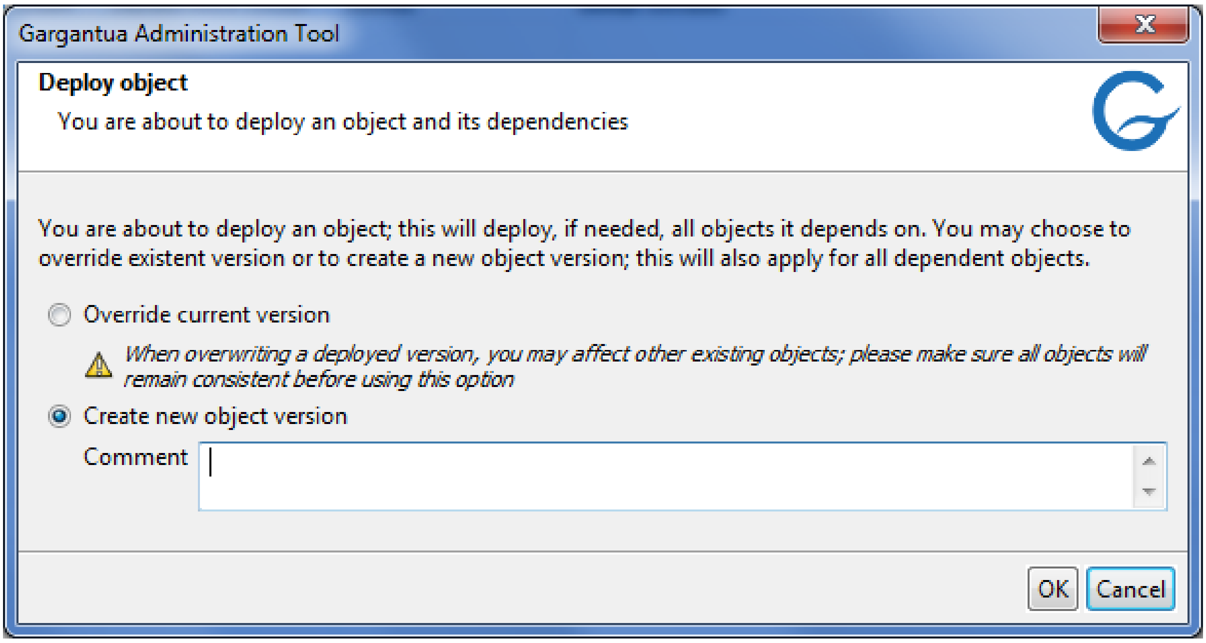
2. If the **Compile** tab contains error or warning messages, solve the problems first: you cannot deploy the form as is.

   If the **Compile** tab does not contain any error or warning messages, go to the next step of this procedure.

3. At the bottom of the right pane, click the **Deploy** or **Redeploy** button.

   If this is the first time that this form is deployed, the procedure is complete.

   Otherwise, the **Deploy object** dialog displays: perform the next steps of this procedure.



4. If you want to keep a backup of the former version of the form, select the **Create new object version** radio button. You can add a comment allowing you to identify later the new version that you are about to create.

   Otherwise, select the **Override current version** radio button: the former version of the form will be replaced by the version you are about to deploy.

5. The (re)deployment of a form automatically causes the (re)deployment of the composition rules it depends on. If other design objects (views, processes, IntelliScan jobs...) depend on the form, an additional frame displays at the bottom of the dialog, allowing you to select them in order to redeploy them. If you do not select them, only their working copy will be automatically updated: they will get the icon.

6. When you are finished, click **OK** to close the dialog.

   The new form version has been deployed.

Working copy vs. deployed versions of the forms

You may want to create a new form and to save it, without making it immediately available to the Web Client users. You may also need to modify a form, without all the changes to be directly applied in the Web Client.

This is why Gargantua makes a distinction between:

- The **working copy** of a form, that is its latest saved version, accessible via the Administration Tool;
- The latest **deployed version** of a form, that is the current form version used in the Web Client to create production objects.

Three icons allow you to know at first glance the relation between the working copy and the latest deployed version of a given form:

- The form has not been deployed yet or has been undeployed: the working copy is accessible via the Administration Tool and no deployed version is currently applicable.
- The form has not undergone changes since its latest deployment: the working copy and the latest deployed version are the same.
- The form has undergone changes since its latest deployment: the working copy visible in the Administration Tool is different from the deployed version applicable in the Web Client.

Undeploying a form

If you want to make sure a form does not display anymore in the Web Client, but not to delete it from the Administration Tool, Gargantua allows you to undeploy it, for instance in order to modify and redeploy it later on.

Proceed as follows:

1. Check that the following two conditions are met:
   - No production object has been created yet with the form.
   - No other deployed design object (view, process, IntelliScan job...) depends on the form.

   If these two conditions are not met, you will not be able to undeploy the form.
2. In the left pane of Gargantua Administration Tool, click the form you want to undeploy.

   The form management screen displays in the right pane.

3. At the bottom of the right pane, click the **Undeploy** button.

   The icon displays next to the form name in the left pane of the Administration Tool: the form deployment has been cancelled.

Assigning a display profile to a form

With the display profiles, you can customize the appearance of the documents list and the behavior of the GARGANTUA Web Client for one or more folders or processes categories, depending on the documents to be stored and your working habits.

To do so, you need to apply the appropriate display profile to the form used to create the corresponding folders or processes.

Proceed as follows:

1. In the left pane of the Administration Tool, expand the branch corresponding to the GARGANTUA database of your choice.
2. Click the **Forms** sub-branch.

   The **Manage forms** screen displays in the right pane.

3. In the **Properties** tab, select the display profile of your choice in the **Display profile** drop-down list.
4. When you are finished, in the bottom left corner of the right pane, click the **Apply** button.

   You can now click the **Deploy** or **Redeploy** button so that the modification is taken into account in the Web Client.

Duplicating a form

You may want to duplicate a form, in order for example to create a slightly different one from the copy.

To duplicate a form:

1. In the left pane of the Administration Tool, click the **Forms** sub-branch.

   The **Manage forms** screen displays in the right pane.

2. In the list, click the row of the form that you want to duplicate.

   The row is highlighted.

3. In the bottom left corner of the right pane, click the **Duplicate** button.

   A new form named “xxx **(1)**” displays in the list: you can now rename and modify it as you want.

Exporting forms

You may want to export forms as an archive in .sxa format, in order to import them later into another database or onto another server.

To export one or more forms, proceed as follows:

1. In the left pane of the Administration Tool, expand the branch corresponding to the GARGANTUA database of your choice.
2. Click the **Forms** sub-branch.

   The **Manage forms** screen displays in the right pane.

3. In the bottom right corner of the right pane, click the **Export** button.

   A dialog allowing to select the objects to export displays.

4. In the **Object** column of the dialog, check the checkboxes corresponding to the forms that you want to export.
5. In the **History** column, check the checkboxes corresponding to the forms for which you want to export not only the version currently deployed, but also the history of former versions.
6. Click **OK** to close the dialog.

   The file explorer displays.

7. Browse to the local or remote folder where you want to save the .sxa export, and click **Save**.

   A confirmation message displays.

8. Click **OK**.

   The .sxa export has been saved on your disk: you can now reimport the forms into another database or onto another server.

IMPORTING FORMS

To import one or more forms in the .sxa format into a GARGANTUA database, proceed as follows:

1. In the left pane of the Administration Tool, expand the branch corresponding to the GARGANTUA database of your choice.
2. Click the **Forms** sub-branch.

   The **Manage forms** screen displays in the right pane.

3. In the bottom right corner of the right pane, click the **Import** button.

   The file explorer displays.

4. Browse to the folder where you have saved the .sxa archive, and click **Open**.

   A dialog allowing to select the objects to import displays.

5. In the **Object** column of the dialog, check the checkboxes corresponding to the forms that you want to export.
6. In the **History** column, check the checkboxes corresponding to the forms for which you want to export not only the version currently deployed, but also the history of former versions.
7. If you want to override the forms of the target database that have the same name as imported forms,

check the **Overwrite** checkbox.

Otherwise, leave the checkbox unchecked. The forms imported will be renamed as “xxx **(1)**” if forms with the same name already exist in the database.

8. Click **OK**.

   A confirmation message displays.

9. Click **OK**.

   The operation has been successfully completed: the forms imported are now available in the database.

DELETING A FORM

To permanently delete a form, proceed as follows:

1. Check that the following two conditions are met:
   - No production object currently relies on one of the deployed versions of the form.
   - No deployed version of another design object (view, process, IntelliScan job...) depends on the form.

   If these two conditions are not met, you will not be able to delete the form.
2. In the left pane of GARGANTUA Administration Tool, click the name of the form to delete.

   The form management screen displays in the right pane.

3. In the bottom left corner of the right pane, click the **Delete** button.

   The form disappears from the navigation tree in the left pane of the Administration Tool: it has been successfully deleted.