



VIEWS

ADMINISTRATION TOOL

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WHAT IS A GARGANTUA CUSTOM VIEW?

By default, all production objects are classified and displayed where they have been created by the Web Client users: this classification scheme implemented manually is called **default view**.

However logical and well hierarchized this default classification scheme may be, it is often useful to have alternative displays in order to reclassify and sort the production objects of a GARGANTUA database according to different criteria. For example, it may be interesting to view in alphabetical order contents sorted chronologically by default. Or, at the contrary, it may prove useful to display in chronological order objects initially sorted in alphabetical order and to restrict them to a given period a time.

This is what **custom views** are for: with them, the administrator can implement for each GARGANTUA database alternative classification schemes allowing to sort and display dynamically production objects according to the value of one or more of their attributes.



Custom views only apply to the active part of databases. For the archive part, only the default view is available.

CASE STUDY - WHAT CAN BE DONE WITH VIEWS?

DEFAULT VIEW - CREATING FOLDERS

The “HR” database default view relies on a chronological classification scheme, generated automatically at the end of a workflow process. The scenario is as follows:

Step 1 - Amy Smith, HR Assistant, is in charge of the administrative management of recruitments: when a new employee is hired, Amy gathers the related information and documents, and starts a GARGANTUA process allowing to create the employee HR personal file.

In the process form, Amy specifies the following information:

- **Identity and contact information:** first name, last name, phone number, e-mail address, and postal address;
- **Position:** department, position name, contract type, manager or not, contract start date and end date, if known; Amy also checks the “In office” checkbox, which will be unchecked when the person leaves the company;
- **Folder status:** Amy indicates whether the folder is complete or not, and, if it is not, which documents are missing.

The screenshot shows the 'HR Personal File' creation form. The interface is divided into three main sections: 'My tasks', 'Current task', and a sidebar.

My tasks: Shows a 'Start process' button and a list of tasks: 'fill in the form' and 'add documents'.

Current task: The main form area, titled 'HR Personal File'. It contains the following fields and options:

- Label:** FERGESON Michael
- Identity - Contact Information:**
 - First Name: Michael
 - Last Name: Fergesson
 - Phone Number: 646 550-1212
 - E-mail Address: michael.fergesson@mycompany.com
 - Postal Address: 43 West 33rd Street
 - Zip Code: 10001
 - City: New York
 - Country: United States
- Position:**
 - Department: Documentation
 - Contract Type: Permanent
 - Position Name: Technical Writer
 - Manager: ☒ Yes [Clear](#) ☐ No
 - In Office: ☒ Yes [Clear](#) ☐ No

At the bottom of the form, there are three buttons: 'Start process', 'Save', and 'Cancel draft'.

After filling the process form, Amy attaches the documents she has: CV, cover letter, highest diploma copy... For each document, she fills in the “HR Document” form, that allows to specify the document name and “Category”. In this case, the “Category” attribute gets the “Recruitment” value, but later on documents about “Training”, “Salary” or “Time Off” will be added to the employee HR personal file.

Add documents

Choose a document type: HR Document Reset

HR Document

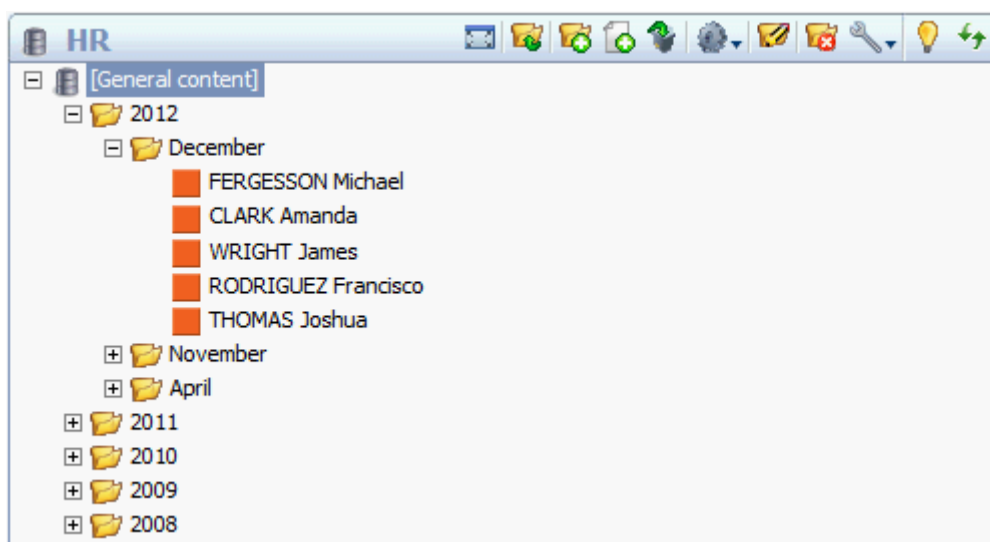
Label: CV

Category: Recruitment
Training
Time Off
Salary

Step 2 - When Amy has finished, she clicks the **Start process** button. The HR Legal Manager, Emily Anderson, then receives a new workflow task in her inbox. After accepting the task, Emily modifies the form if needed, and attaches the legal documents related to the recruitment with the “HR Document” form. When she has finished, she clicks the **Send** button.

Step 3 - The HR Manager, Salma Berkani, receives a new task: after accepting it, she makes sure the folder is valid, and clicks the **Send** button.

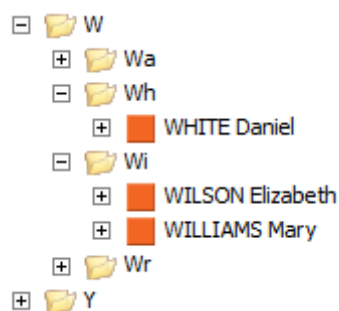
Step 4 - Finally, an EDM task automatically classifies the new employee folder in the “HR” GARGANTUA database, with the following classification scheme: recruitment year > recruitment month > employee last name and first name. The folder named with the employee last name and first name gets the process form and attributes, as well as the attached documents.



The default view thus generated is suited for archiving purposes. However, the HR Department members cannot use it to find the folder of an employee whose recruitment date they do not know. The GARGANTUA administrator therefore needs to create custom views, in order to make access to information easily.

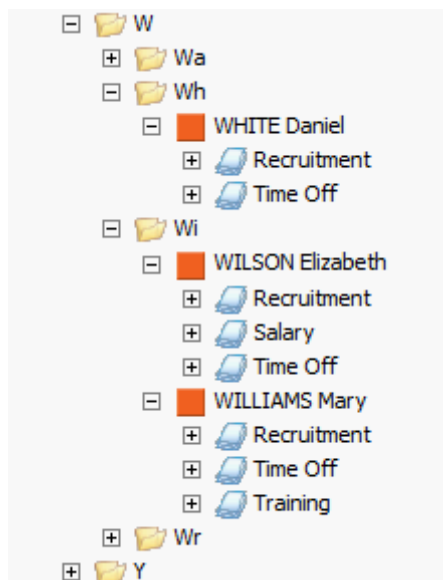
CUSTOM VIEW #1 - DISPLAYING IN ALPHABETICAL ORDER

The HR Department members need to find easily any folder from the name of the corresponding employee. The GARGANTUA administrator therefore creates a custom view that displays all the folders in alphabetical order. Besides, as there are many folders, he does not only sort the personal files themselves, but also creates virtual folders allowing to group them according to the first letter of the employee last name, and then the first two letters:

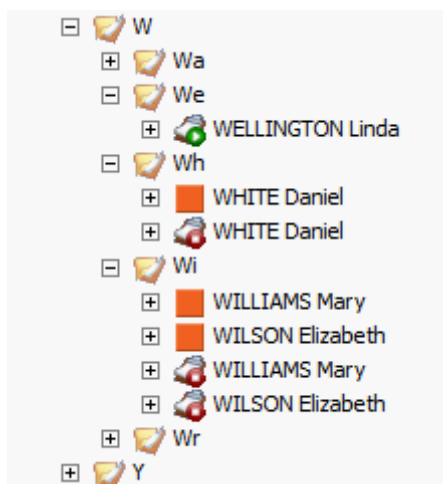


Virtual folders can be recognized by their color, paler than the actual folders'.

In the default classification scheme of the “HR” database, documents attached to processes are directly added to the corresponding employee personal file, whatever category they belong to (“Time Off”, “Recruitment”, “Training”...). However, thanks to the view features, the GARGANTUA administrator can implement a classification scheme for documents inside each folder, using the value of the “Category” attribute:



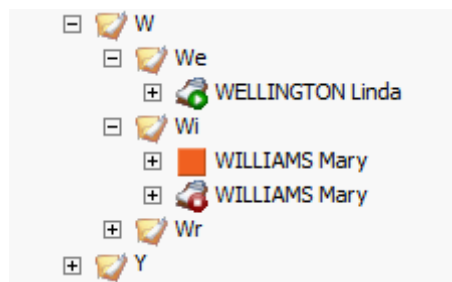
Finally, after consulting the HR Department members, the GARGANTUA administrator decides to modify the view in order to add to the folders the process instances contained in the database. The “HR” database view thus allows to access not only the folders of the employee that have been hired, but also those of the employee currently being hired:



Processes can be displayed in views, but contrary to folders, the list of documents they contain cannot be displayed.

CUSTOM VIEW #2 - SORTING INCOMPLETE FOLDERS

To perform efficiently some tasks, the HR Department members also need a quick access to incomplete folders. Custom views allow not only to reclassify the contents of a database, but also to filter it according to criteria. In the case of the “HR” database, the GARGANTUA administrator therefore creates a view identical to the alphabetical one, but with incomplete folders only:

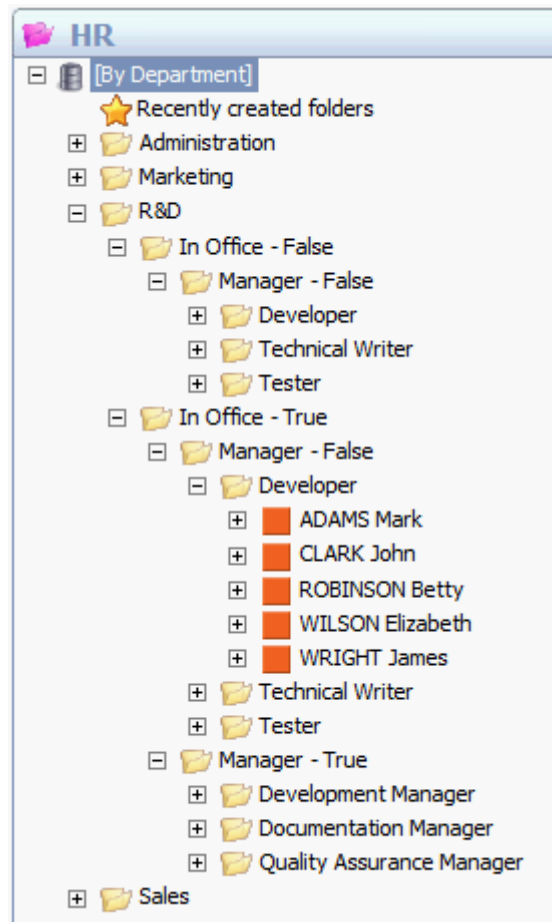


CUSTOM VIEW #3 - DISPLAYING BY DEPARTMENT/HIERARCHICAL LEVEL/ POSITION

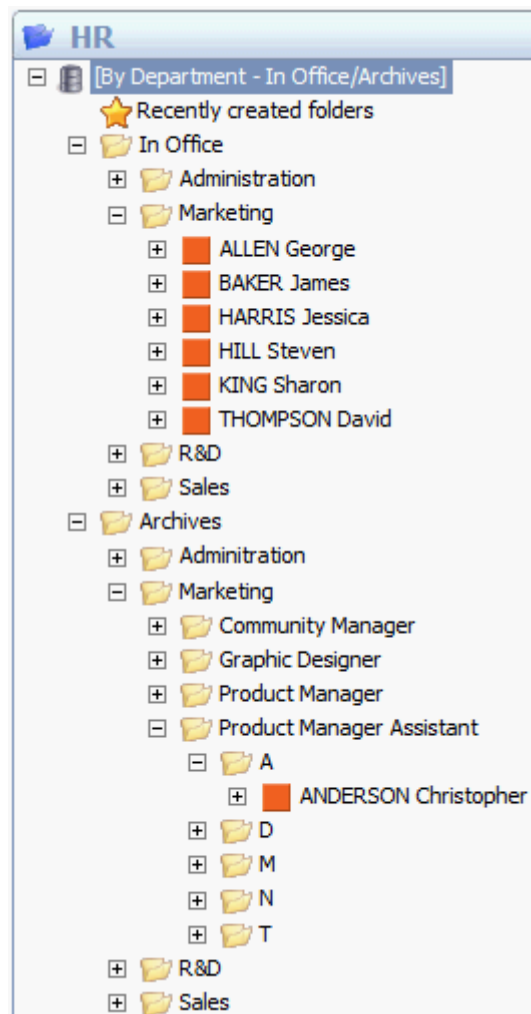
Finally, the HR Department members need to view the database content sorted according to the employee department, hierarchical level, and position name.

To do so, the GARGANTUA administrator creates 2 different views for them:

- A one-branch view, applying the same classification criteria to all folders;



- A two-branch view, separating the folders of employees in office from those of employees having left the company, and displaying them with 2 different classification schemes so as to take into account the fact that there are many more archives than active folders.



Views offer many options allowing to configure accurately the object display in the Web Client, in order to make accessing and processing information optimal. The rest of this chapter explains how to implement views using GARGANTUA Administration Tool.

MANAGING VIEWS

CREATING A NEW VIEW

To create a new GARGANTUA custom view, 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 **Views** sub-branch.

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

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

The new view management screen displays.

4. In the **Properties** tab, fill in the **Name** field, and, if you want, the **Description** field; optionally, add the view to a package in the **Package** field.
5. [Make the necessary assignments](#), so that one or more Web Client users can access the view.
6. In the **Content** tab, [add at least one view item in the Classification section](#).
7. Specify a **Name** and, if you want, a **Description** for the view item.
8. [Select the object types to be taken into account at the view item level](#): folders, documents, processes...
9. [Apply the necessary settings to this view item](#). In most cases, you need to set at least one classification criterion, indicating how to group and sort the objects at the view item level.
10. Create the other view items needed, if any, and configure them.
11. Click the **Apply** button in the bottom left corner of the right pane.

You can now deploy the view, in order for the Web Client users to use it to view the content of the corresponding database.

VIEWS MANAGEMENT SCREEN - AVAILABLE TABS

The **Views** management screen contains the following tabs:

- The **Properties** tab allows you to display the main features of a view: name, description, history, etc..
- The **Content** tab allows you to create the tree view of a view, and select the items that compose it (see from [Implementing a view classification tree](#)).
- The **Dependencies** tab allows you to display the items used by a view.
- The **Compilation** tab allows you to view the potential errors in a view.
- The **Summary** tab allows you to view the summary of a view.
- The **Log** tab allows you to view the list of all the operations performed on a view, and to filter them according to some criteria.

- The **Help** tab allows you to access the contextual help.

“PROPERTIES” TAB

The **Properties** tab allows you to name or rename a view (**Name** field) and to type a description (**Description** field).

The **Properties** tab also allows you to [match a resource to a view](#), with the help of the **Description URL** field and to affect it an icon (**Icon** drop-down list).

The **Properties** tab finally allows you to [affect a view to various users](#), in the **Assignments** field, and to view the history of its deployed versions (**Deployment history table**).

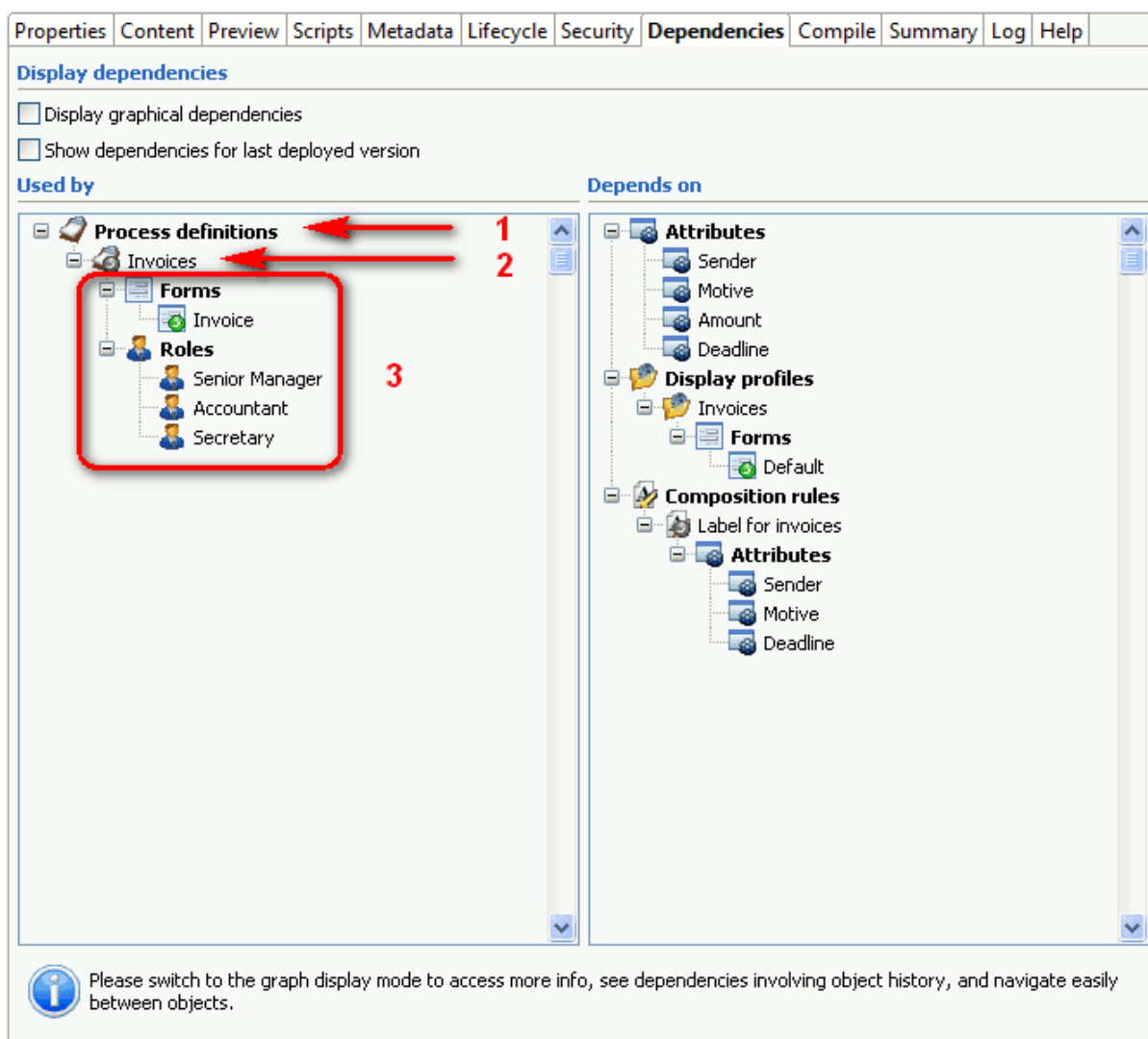
“DEPENDENCIES” TAB

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.

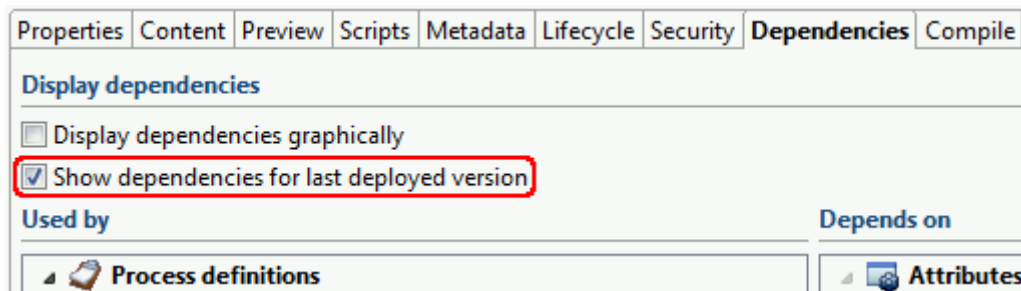
In the dependencies analysis screens as well as everywhere else in the interface, the  icon indicates whether an object is currently deployed and, if so, whether the deployed version is identical to the working copy:

- 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?

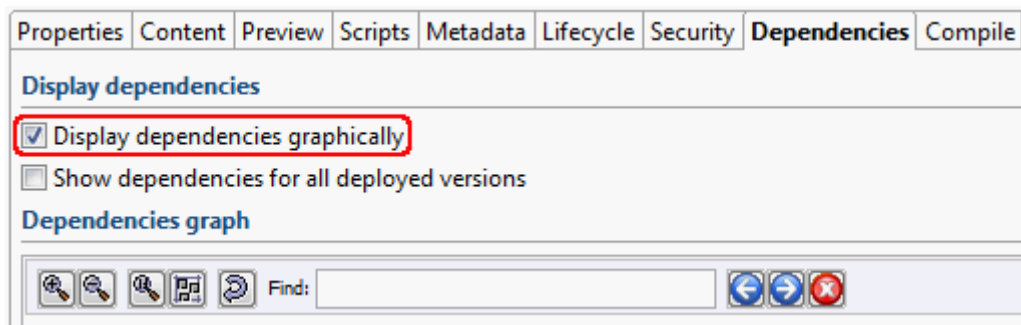
By checking the **Show dependencies for last deployed version** checkbox, you can choose to display the dependencies for the version of the object that is currently deployed, instead of the dependencies for the working copy.

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

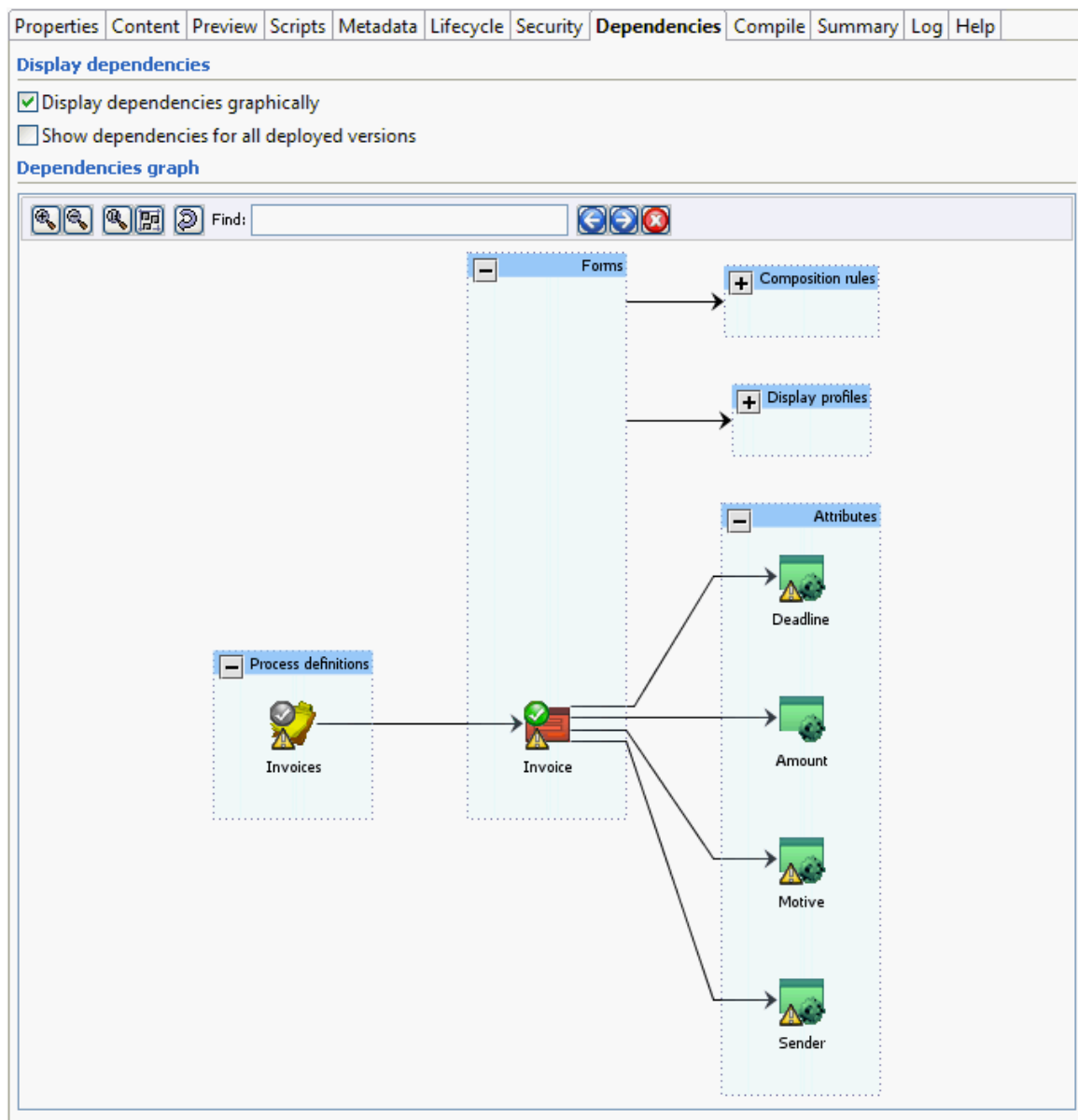


DISPLAYING DEPENDENCIES GRAPHICALLY

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:



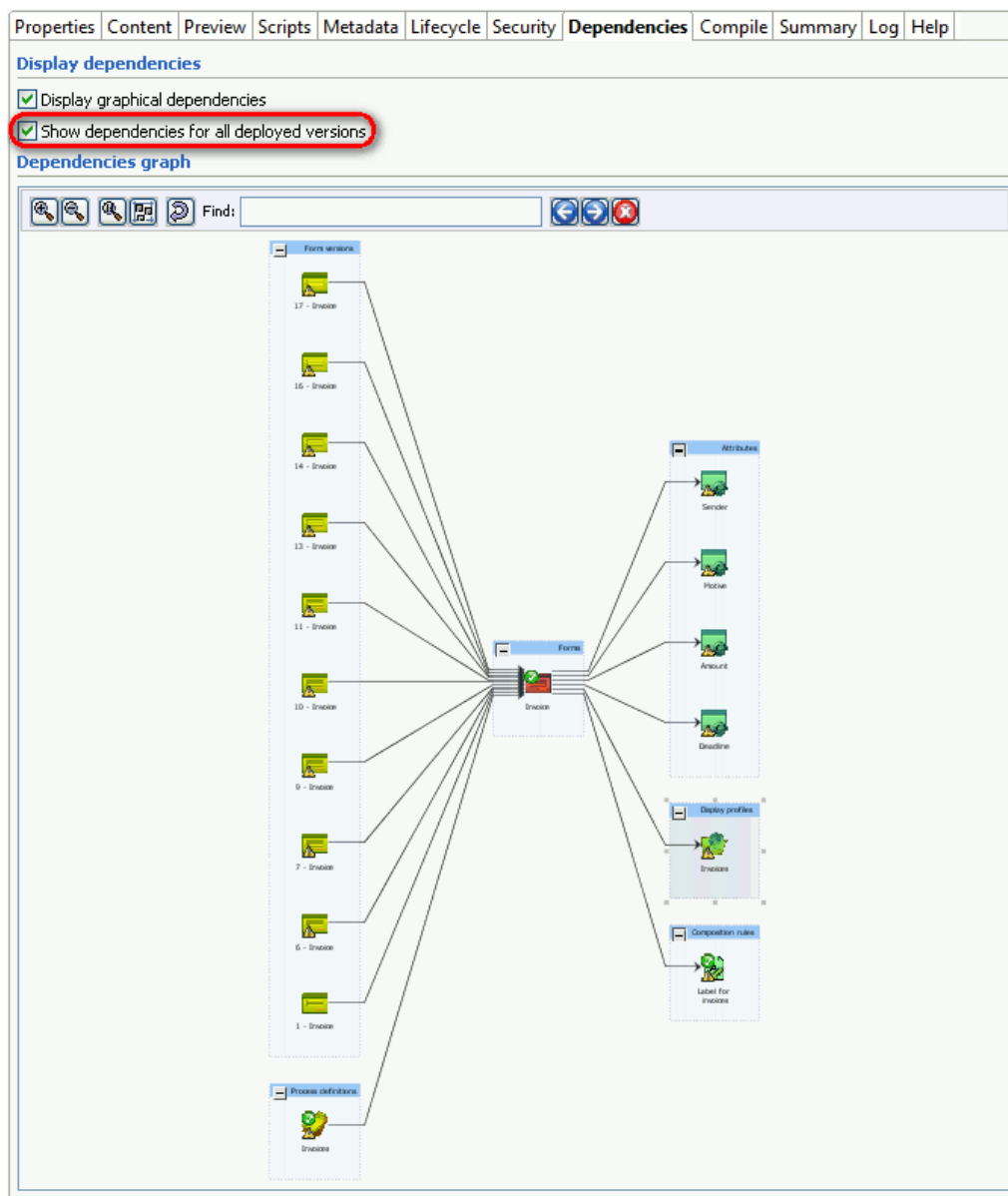
The toolbar above the graph allows you to:

- - 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:



“COMPILATION” TAB

The **Compilation** tab makes it possible to diagnose and solve errors and inconsistencies before an object is published. This feature is also available at database level, so that all objects can be compiled in a single move.

HOW AND WHEN TO USE THE GARGANTUA COMPILER

Before you deploy or redeploy a design object, you need to compile it in order to solve any potential errors or problems:

1. Click the name of the object you want to deploy in the left pane of the Administration Tool - or the name of a database, if you want to deploy all the objects it contains in a single move.

The corresponding management screen appears in the right pane.

2. In the lower part of the right pane, click the **Compilation** button.

The Compile tab opens and a list of messages appears.

3. If the list only contains success and/or information messages (see [Structure of the messages list](#)), you can proceed and deploy the object.

On the other hand, if the list contains error and/or warning messages (see [Structure of the messages list](#)), you must solve the corresponding problems before you deploy the object.

STRUCTURE OF THE MESSAGES LIST

The list of the compiler's messages contains the following information:

Properties	Assignments	Compile	IP Filters	Storage rules	Log	Database logging options	Help
3 errors, 2 warnings, 3 infos							
		Invoices by Sender : Incorrect criteria combinations (multiple actual objects for folders and/or processes)					
		Invoices					
		Invoices : The role assigned to this process is not assigned to the database					
		Invoices : Unlinked cancel thread					
		Validation					
		Finance : The database is using the default storage.					
		It is recommended that each Gargantua database use one or more dedicated storage areas, not the system default. You should create these storage areas and rules that make use of them. You cannot disable this message, only make it a warning.					
		Invoices by Sender : No actor(s) assignment(s) to view (the view is not public)					
		Invoices : No planner selected					
		Invoices : Expected an identifier and instead saw 'var'					Line: 2
		Invoices : Stopping, unable to continue (50% scanned).					Line: 2
1	2	3	4	5			

1. Icons indicating the type of each message:



- Success;



- Information;



- Warning;



- Error;

2. Icons indicating the type of the objects the messages are about;
3. Links leading to the management screens where the problems can be solved;
4. Details about the current problem;
5. If the object is a script, line where the problem occurs.

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.

IMPLEMENTING A VIEW CLASSIFICATION TREE

To implement a view classification tree, you need to create and hierarchize **view items** in the **Classification** frame: when configuring each view item, you will determine which production objects must be taken into account at this level, and which sorting criteria must be applied.

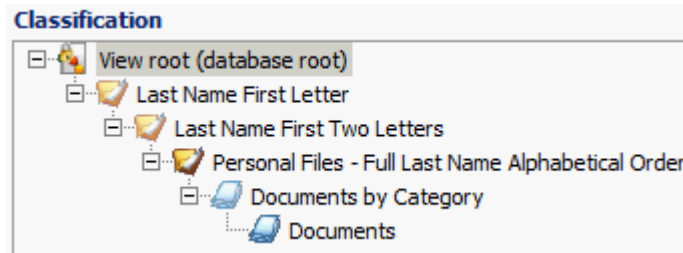
Proceed as follows:

- To create and hierarchize view items, use the buttons located on the right of the **Classification** frame:
 - Add a blank view item, without any setting, child of the view item currently selected;
 - Create a view item identical to the view item currently selected, with the same settings and at the same level;
 - Delete the view item currently selected, and all its children, if any;
 - Move up the view item currently selected without changing its level;
 - Move down the view item currently selected without changing its level;
 - Move the view item currently selected to the level above (the parent item becomes a sibling item);
 - Move the view item currently selected to the level below (the sibling item located right above becomes the parent item).
- To configure a view item, click it in the **Classification** frame, and fill in the sections located at the bottom of the **Content** tab: the information displayed here always corresponds to the view item currently selected in the **Classification** frame.

EXAMPLES

Here are the view items used to obtain the classification schemes of the case study [above](#):

- Alphabetical classification scheme, with or without filter:



The “Last Name First Letter” item takes into account the folders and processes stored in the database. It includes those for which the “Last Name” attribute has been filled, and groups them according to the first letter of this attribute. In the Web Client, virtual objects corresponding to the groups are created and sorted in alphabetical order. If the view is intended for incomplete folders only, a filter is set on this view item. The filter specifies that only the objects for which the “Folder complete” attribute has the “False” value are included.

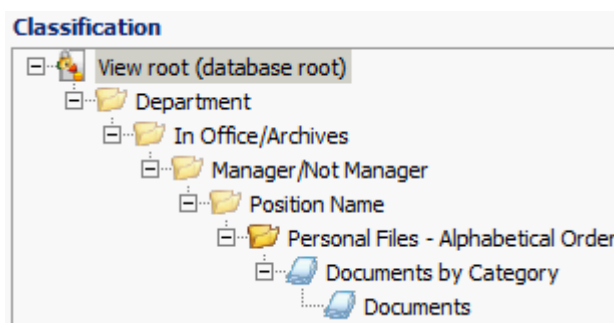
The “Last Name First Two Letters” view item is configured in the same way as the “Last Name First Letter” item, except that it groups objects according to the first two letters of the “Last Name” attribute value and that, in the case of the filtered view, it is not necessary to reapply the filter already set at higher level.

The “Personal Files - Full Last Name Alphabetical Order” view item does not correspond to virtual objects, but to actual folders and processes stored in the database. It sorts them in alphabetical order according to the value of the “Last Name” attribute.

The “Documents by Category” view item takes into account the documents stored in the actual folders classified by the view. It allows to sort them according to the value of the “Category” attribute. In the Web Client, virtual objects are created so as to group documents by category.

The “Documents” view item allows to display the actual documents stored in the folders: in the Web Client, it corresponds to the list of documents that displays in the right pane.

- Classification scheme by department/hierarchical level/position:



The “Department” view item takes into account the folders stored in the database. It includes the folders for which the “Department” attribute has been filled, and groups them according to the value of this attribute. In the Web Client, a series of virtual objects corresponding to the groups is created.

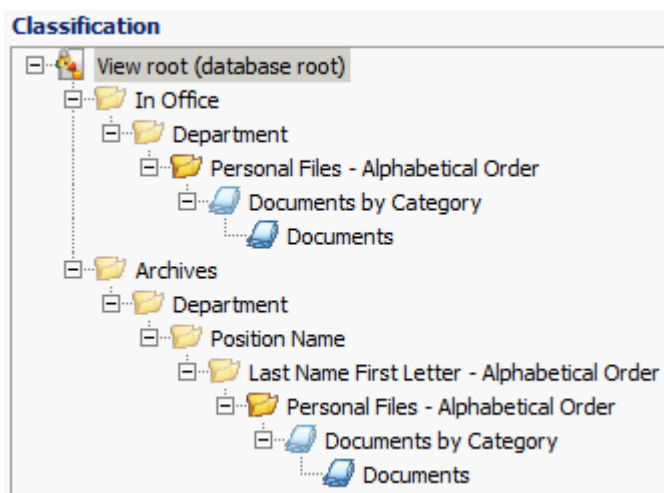
They receive as name the value of the “Department” attribute to which they correspond and are sorted in alphabetical order.

Among the folders included at “Department” level, the “In Office/Archives” view item takes into account the folders for which the “In Office” attribute has been filled, and groups them according to the value of this attribute (“True” or “False”). In the Web Client, inside each virtual folder corresponding to a department, new virtual folders are created in order to separate archives from active folders.

The “Manager/Not Manager” and “Position Name” view item work in the same way. For each of them, the view navigation tree in the Web Client gets a new level.

At the “Personal Files - Alphabetical Order” level, actual folders are displayed, grouped, and sorted, according to the criteria set at the higher levels. The “Documents by Category” and “Documents” view item work exactly in the same way as in the alphabetical order view.

- Classification scheme by department/hierarchical level/position, with active folders and archives separated:



This two-branch view allows to separate active folders from archive folders, in order to apply different classification criteria to them.

To do so, 2 sibling items are created: “In Office” and “Archives”. The “In Office” item has a filter allowing to include only the objects for which the “In Office” attribute has the “True” value. The “Archives” item has a reverse filter allowing to include only the objects for which the “In Office” attribute has the “False” value. The two branches can then be configured in a different way.

The other items work as explained for the views analyzed above.

SELECTING THE OBJECT TYPES THE CRITERIA WILL APPLY TO

When configuring a view item, one way to select the objects to include and sort is to specify the type of production objects to take into account at this level: folder, processes, folders and processes, or documents. It is

mandatory to make this choice, by selecting the corresponding radio button, under the **Description** field in the **Content** tab.

In the **Classification** frame, the view item gets an icon corresponding to the choice made (in the Web Client, the virtual object generated also gets this icon):

-  Item classifying folder objects;
-  Item classifying process objects;
-  Item classifying folder and process objects;
-  Item classifying document objects.

 *You cannot use a same view item to classify documents and other types of objects, even if they share attributes and/or have the same form. You can create two sibling view items at the same level in the classification tree, one for documents, the other for folders and/or processes. However, in that case, the Web Client will first display all the documents objects, and then the other objects, and you will not obtain a unified classification.*

PRACTICAL CONSIDERATIONS

Since a view works as a “funnel” where only objects included at higher level in the classification tree can be included at lower level, in most cases, you will select the same objects type for child items as for parent items.

However, there are counterexamples, one of the most frequent being described in the [case study](#) presented at the beginning of the chapter. In the 4 views created, folders and/or processes are classified, but after displaying the actual objects, a new classification is implemented for the documents stored in the folders: the view items corresponding to the highest levels of the classification tree take into account folder and/or process objects, while the 2 lowest levels correspond to documents.

DETERMINING IF A VIEW ITEM CORRESPOND TO ACTUAL OR VIRTUAL OBJECTS

By default, all the view item created correspond to virtual objects. If you want to display the production objects themselves, you need to check the **Display the actual objects** checkbox located in the **Unique criteria** section in the **Content** tab.

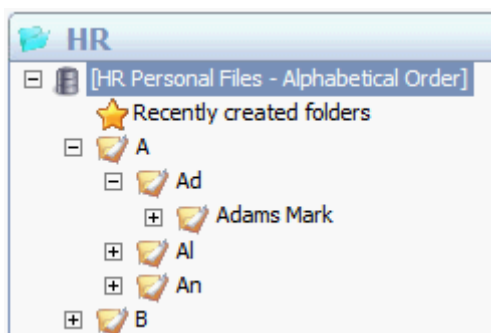
Once the checkbox is checked, the icon indicating the object type gets brighter: you can thus recognize easily the view items that correspond to actual objects.

 *In the Administration Tool, all the view items corresponding to virtual objects have a pale icon. However, in the Web Client, only the virtual objects corresponding to folders and/or processes have a pale icon: the virtual objects corresponding to documents have a bright icon.*

PRACTICAL CONSIDERATIONS

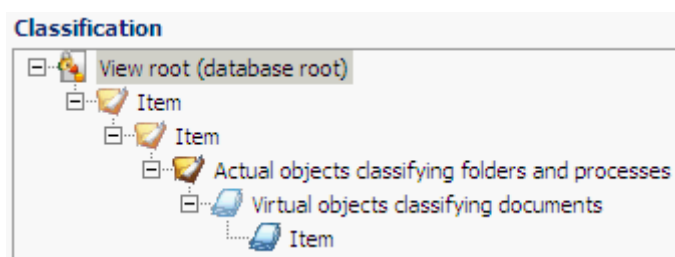
You could theoretically create a view without ever checking the **Display the actual objects** checkbox. However, if you do so, you will not be able to use the view to access the production objects (as they will not display), but only to see if production objects corresponding to the criteria do exist.

All the elements of the view below correspond to virtual objects. We can see that there is one or more folders for Mark Adams, but we cannot view them:



Most of the time, the **Display the actual objects** checkbox is checked for the view item located at the lowest level of the classification tree: first, objects are sorted, then, actual objects are displayed.

Indeed, when a view item corresponds to actual objects, it becomes impossible to add child items to it in order to perform further sorting. You cannot, for example, use new items to sort sub-folders inside an actual folder. However, you can classify the documents stored in actual folders. It is then possible to create child items of the item corresponding to actual folders:



DETERMINING THE CLASSIFICATION CRITERIA TO APPLY TO A VIEW ITEM

To get the result you want, you usually need to configure each view item in order to specify one or more criteria to apply at its level, and the display order of the corresponding objects.

To do so, use the table located in the **Unique criteria** section of the **Content** tab to set the following options:

- The attribute to use for the classification (**Attribute** column);
- The part of its value to take into account (**Operator** column);

- The sorting, increasing or decreasing, to apply to the display (**Sorting** column).



If you do not configure any classification criterion for a view item corresponding to virtual objects, you will get only one virtual object in the Web Client, containing all the objects meeting the other conditions set for the item (object types, filters...).

If you do not configure any classification criterion for a view item corresponding to actual objects, those will display in the order set in the default view.

OPTIONS AVAILABLE IN THE “ATTRIBUTE” COLUMN

In the **Attribute** column of the **Unique criteria** table, you can select any system or custom attribute of the database, as long as it belongs to one of the following types: string, integer, float, date, web address, boolean, e-mail or custom list. On the contrary, attributes belonging to the currency, text area or system list type cannot be selected as classification criteria.



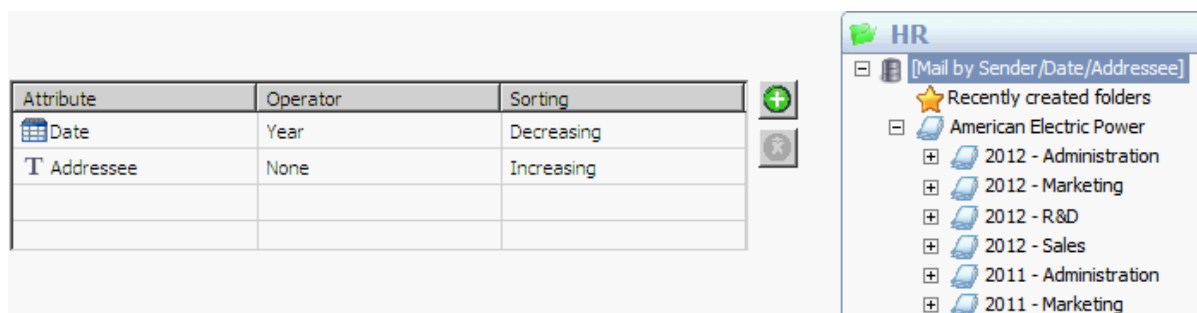
If an attribute is chosen as classification criterion, only the production objects for which this attribute has been filled can be displayed in the view. It is then recommended to make these attributes mandatory in order to structure the views.

You can select up to 3 attributes to use as classification and grouping criteria. If you select several attributes:

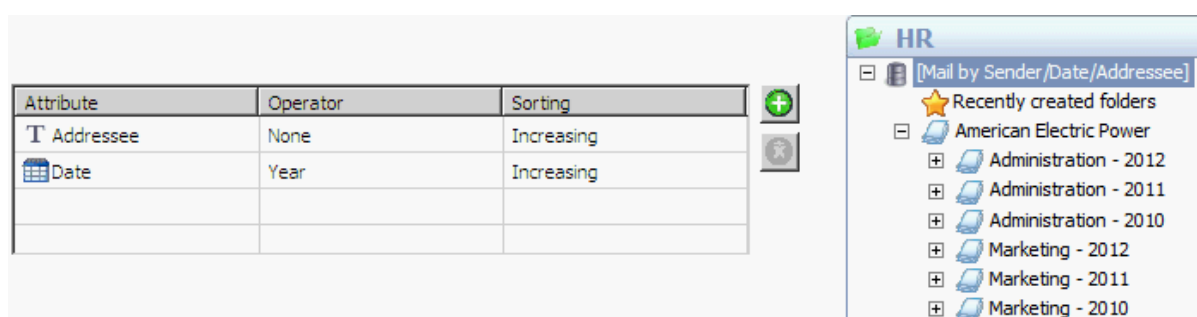
- The operator between the criteria is **AND**: only the objects with the same value for all the criteria will be classified together;
- The criteria order matters: objects are classified taking into account first criterion 1, then criterion 2, and finally criterion 3.

Here is an example allowing to understand better how multiple view items work. Let us consider a “Mail” GARGANTUA database, where the mail received by a company is classified according to the sender, and, as a second step, according to the date and the addressee.

By putting in place the criteria below, a virtual object combining “Date” and “Addressee” is obtained: pieces of mail sent at the same date to different departments are not grouped, and pieces of mail sent to a same department at different dates are not grouped either.



If the attributes order in the **Unique criteria** table is modified, the classification scheme is modified too: the "Addressee" attribute is now taken into account first:



OPTIONS AVAILABLE IN THE "OPERATOR" COLUMN

Options available in the **Operator** column of the **Unique criteria** table allow you to determine the part of the selected attribute value that will be taken into account to sort objects.

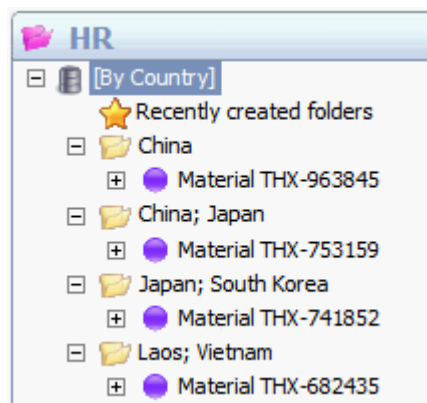
Options available are different according to the attribute type:

- For a string, e-mail or custom list criterion-attribute, the following operators are available:
 - None** - If you select this option, the entire attribute value will be taken into account.
 - First letter** - If you select this option, only the first character of the attribute value will be taken into account for the sorting. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the first character of the attribute value will be displayed.
 - First two letters** - If you select this option, only the first 2 characters of the attribute value will be taken into account for the sorting. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the first 2 characters of the attribute value will be displayed.
 - First letter capitalized** - If you select this option, only the first character of the attribute value will be taken into account for the sorting. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the first character of the attribute value will be displayed, in upper case.
 - First two letters capitalized** - If you select this option, only the first 2 characters of the attribute value will be taken into account for the sorting. Besides, if this criterion is used to

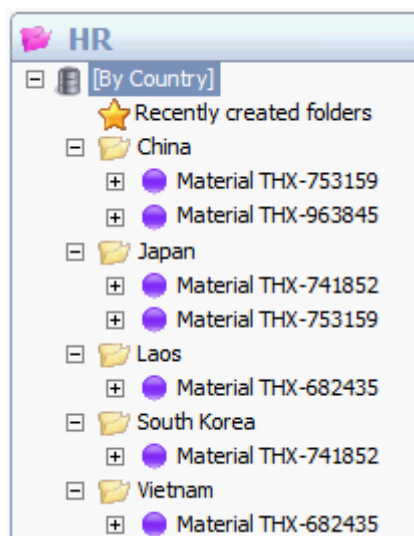
name **virtual** objects in the Web Client, only the first 2 characters of the attribute value will be displayed, in upper case.

- **First letter lower case** - If you select this option, only the first character of the attribute value will be taken into account for the sorting. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the first character of the attribute value will be displayed, in lower case.
- **First two letters lower case** - If you select this option, only the first 2 characters of the attribute value will be taken into account for the sorting. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the first 2 characters of the attribute value will be displayed, in lower case.
- **Tokenized** - This option can be used for view items that correspond to virtual objects and that use as criterion-attribute a list accepting several values. By default, in this case, the view generates as many virtuals objects as there are values combinations, and then displays the actual objects once in the relevant location. The **Tokenized** operator allows you to modify this behavior so that the view generates a virtual object for each value of the list: actual objects can then display several times, for each value of the list that they have.

Default display:



Tokenized display:



- For a date criterion-attribute, the following operators are available:
 - **None** - If you select this option, all the date items will be taken into account for the sorting: year, month and day.
 - **Year** - If you select this option, only the year of the date will be taken into account. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the year will display.
 - **Month** - If you select this option, only the month of the date will be taken into account. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the month will display, as numbers.
 - **Year and month** - If you select this option, only the year and the month of the date will be taken into account. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the year and the month will display in the following format: 📅 **201112**.
 - **Day** - If you select this option, only the day of the date will be taken into account. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the day will display.
 - **Month as text** - If you select this option, only the month of the date will be taken into account. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the month will display, as text.
 - **Day as text** - If you select this option, only the day of the week will be taken into account. Besides, if this criterion is used to name **virtual** objects in the Web Client, only the day of the week will display, as text.
- For a float, integer, web address or boolean criterion-attribute, no operator is available: the entire attribute value is taken into account.

OPTIONS AVAILABLE IN THE “SORTING” COLUMN

The **Sorting** column of the **Unique criteria** table offers 2 options, **Increasing** and **Decreasing**:

- For a string, web address, e-mail, custom list, or boolean attribute, these 2 options allow you to sort objects in alphabetical or reverse alphabetical order, respectively (in the case of boolean attributes, objects are sorted according to the “True” and “False” values).
- For a date string, these 2 options allow you to sort objects in chronological or reverse chronological order, respectively.
- For a float or integer attribute, these 2 options allow you to sort objects by increasing or decreasing numeric value.

TIP: HOW TO RECLASSIFY THE DOCUMENTS LIST?

Thanks to the view, you can control the display order of the documents list, available in the right pane of the GARGANTUA Explorer.

By configuring the view item corresponding to the actual documents, you can for example display the documents list in alphabetical order:

Unique criteria

☒ **Display the actual objects**

Display Profile

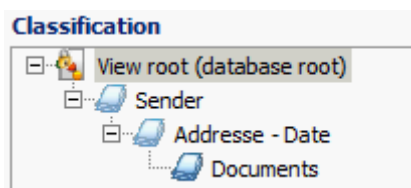
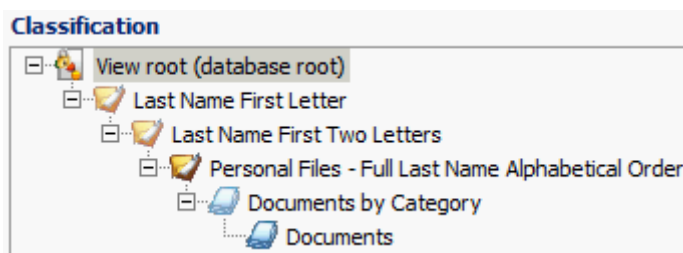
☐ Show subfolders

Attribute	Operator	Sorting
🔖 label	None	Increasing

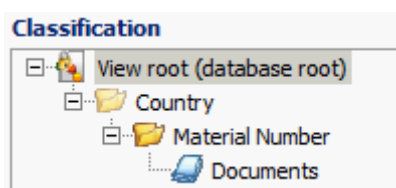
Recruitment							
				Label	Size	Modification	Creation
☐	1			Bachelor's Degree	2.68 Mb	20/12/2012	20/12/2012
☐	2			Cover Letter - Michael Fergesson - Technical Writer	0 bytes	20/12/2012	20/12/2012
☐	3			CV - Michael Fergesson - Technical Writer	303.12 Kb	20/12/2012	20/12/2012
☐	4			Master's Degree	2.68 Mb	20/12/2012	20/12/2012

However, this configuration is only possible if the parent item of the item corresponding to actual documents is used to classify documents and not folders and/or processes.

In the 2 examples below, the documents list can be sorted:



However, in the example below, it is not possible:



APPLYING FILTERS TO A VIEW ITEM

You may want to filter the objects to display in a view not only depending on whether given attributes have been filled or not, but also depending on the **value** of some attributes. In this case, you need to set one or several filters in the **Domain filter** table located in the bottom right corner of the **Content** tab.

You can set up to 3 filters for each view item. In case of multiple filters, the operator between the conditions is **AND**.



The “Domain filter” table is only active for the view items corresponding to virtual objects.

OPTIONS AVAILABLE IN THE “ATTRIBUTE” COLUMN

The **Attribute** column of the **Domain filter** table allows you to choose the attribute(s) to take into account to filter the objects that will be displayed in the view.

In this column, you can select any system or custom attribute of the database, as long as it belongs to one of the following types: string, integer, float, date, web address, boolean, e-mail or custom list.

However, currency, text area and system list attributes cannot be used to set filters.

OPTIONS AVAILABLE IN THE “OPERATOR” COLUMN

Options available are different according to the attribute type:

- For a string, web address, e-mail or custom list attribute, the following operators are available:
 - **Contains** - This operator allows you to include all the objects for which the attribute selected contains a given string.
 - **Not contains** - This operator allows you to exclude all the objects for which the attribute selected contains a given string.
 - **Equal to** - This operator allows you to include all the objects for which the attribute selected has a given value.
 - **Not equal to** - This operator allows you to exclude all the objects for which the attribute selected has a given value.
 - **Is null** - This operator allows you to include all the objects for which the attribute selected has not been filled.
 - **Is not null** - This operator allows you to include all the objects for which the attribute selected has been filled.
- For a float or integer attribute, the following operators are available:
 - **Less than** - This operator allows you to include all the objects for which the attribute selected has a value inferior to a given number.
 - **Greater than** - This operator allows you to include all the objects for which the attribute selected has a value superior to a given number.
 - **Equal to** - This operator allows you to include all the objects for which the attribute selected has a given value.
 - **Not equal to** - This operator allows you to exclude all the objects for which the attribute selected has a given value.
 - **Is null** - This operator allows you to include all the objects for which the attribute selected has not been filled.
 - **Is not null** - This operator allows you to include all the objects for which the attribute selected has been filled.
- For a date attribute, the following operators are available:
 - **Less than** - This operator allows you to include all the objects for which the attribute selected has a value inferior to a given number.
 - **Greater than** - This operator allows you to include all the objects for which the attribute selected has a value superior to a given number.
 - **Equal to** - This operator allows you to include all the objects for which the attribute selected has a given value.
 - **Not equal to** - This operator allows you to exclude all the objects for which the attribute selected has a given value.
- For a boolean attribute, the following operators are available:

OPTIONS AVAILABLE

Options available to set a name composition rule are the following:

- **Today** - The name of the objects corresponding to the view item will contain the date of the current day, in dd/mm/yyyy format.
- **Yesterday** - The name of the objects corresponding to the view item will contain the date of the day before the current day, in dd/mm/yyyy format.
- **One week back** - The name of the objects corresponding to the view item will contain the date of one week before the current day, in dd/mm/yyyy format.
- **One month back** - The name of the objects corresponding to the view item will contain the date of one month before the current day, in dd/mm/yyyy format.
- **One year back** - The name of the objects corresponding to the view item will contain the date of one year before the current day, in dd/mm/yyyy format.
- **First day of month** - The name of the objects corresponding to the view item will contain the date of the current month first day, in dd/mm/yyyy format.
- **First day of year** - The name of the objects corresponding to the view item will contain the date of the January 1st of the current year, in dd/mm/yyyy format.
- **Last day of month** - The name of the objects corresponding to the view item will contain the date of the current month last day, in dd/mm/yyyy format.
- **Last day of year** - The name of the objects corresponding to the view item will contain the date of the December 31st of the current year, in dd/mm/yyyy format.
- **Criterion 1** - The name of the objects corresponding to the view item will contain the value of the first attribute specified in the **Unique criteria** table.
- **Criterion 2** - The name of the objects corresponding to the view item will contain the value of the second attribute specified in the **Unique criteria** table.
- **Criterion 3** - The name of the objects corresponding to the view item will contain the value of the third attribute specified in the **Unique criteria** table.



If you selected an operator (first letter, first letter capitalized...) for a classification criterion-attribute, it will be taken into account for the name composition.

BUTTONS

To set a name composition rule, you can use the following buttons:

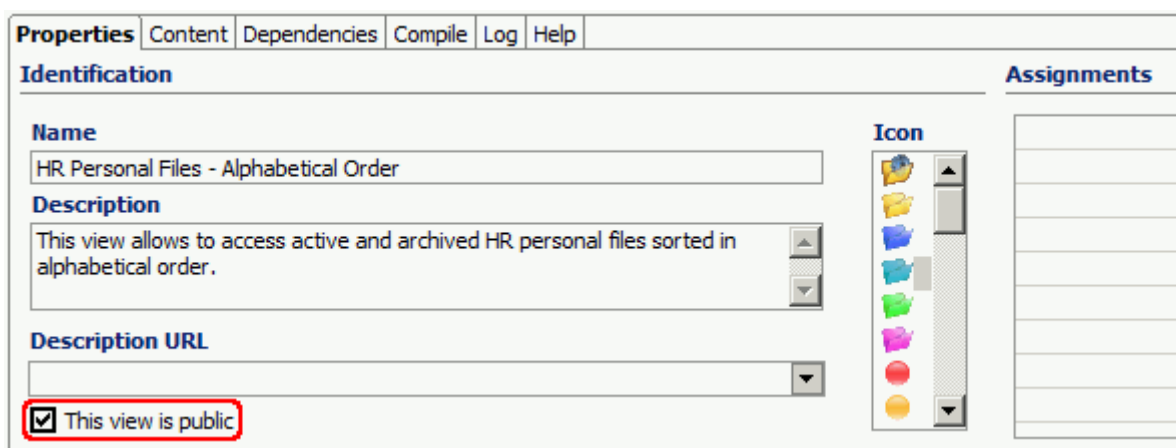
-  Insert a static string of characters in the objects name;
-  Move the item selected to the right frame in order to include it in the objects name;
-  Move the item selected from the right frame to the left frame in order to remove it from the objects name;
-  Move the item selected upwards in the right frame, so that it will be placed before in the objects

- name;
-  Move the item selected downwards in the right frame, so that it will be placed after in the objects name.

ASSIGNING USERS TO A VIEW

By default, a newly created view is not accessible to any Web Client user: you need to assign users to the view.

If you want the view to be accessible to all users without exception, check the **This view is public** checkbox in the **Properties** tab of the **Manage views** screen:



If you want only some users to be able to access the view, proceed as follows:

1. In the **Properties** tab, in the **Assignments** section, click the  **Add** button.
2. In the **Name** field that displays, type the first letters of the user, group, or role name that you want to assign to the view.
3. In the list that displays, double-click the name of the user, group, or role of your choice.
4. Repeat the operation for all the users, groups, or roles to assign.
5. If you want to cancel an assignment, select the corresponding row in the **Assignments** frame, and click the  **Remove** button.

ASSOCIATING A RESOURCE TO A VIEW

As for GARGANTUA databases, you can associate a resource (text, image...) to a custom view in order to display it in the right pane of the GARGANTUA Explorer, when it is empty.

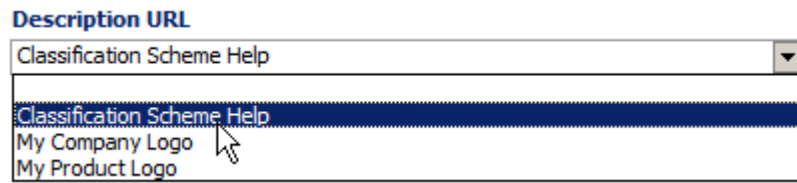
Proceed as follows:

1. Make sure that you have created the resource you need using the **Resources** branch of the Administration Tool.
2. In the left pane of the Administration Tool, click the sub-branch corresponding to the view of your

choice.

The view management screen displays in the right pane.

3. In the **Properties** tab, in the **Description URL** drop-down list, select a resource:



4. Click the **Apply** button in the bottom left corner of the right pane.

DUPLICATING A VIEW

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

Proceed as follows:

1. In the left pane of the Administration Tool, click the sub-branch corresponding to the view that you want to duplicate.

The view management screen displays in the right pane.

2. At the bottom of the right pane, click the **Duplicate** button.

In the left pane, a sub-branch named “xxx **(1)**” corresponding to the new view displays.

3. Click the new sub-branch: you can now start working on the new view.

(RE)DEPLOYING A VIEW

For a view to be accessible from the Web Client, you need to deploy it. In the same way, for the modifications applied to a view to take effect, you need to redeploy it.

To deploy or redeploy a view, proceed as follows:

1. In the left pane of the Administration Tool, click the sub-branch corresponding to the view that you want to deploy.

The view management screen displays in the right pane.

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

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

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

3. If you want to keep a backup of the former version of the view, 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 view will be replaced by the version you are about to deploy.

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

The **Properties** tab displays: the new version of the view has been deployed.

UNDEPLOYING A VIEW

To undeploy a view, proceed as follows:

1. In the left pane of the Administration Tool, click the sub-branch corresponding to the view that you want to undeploy.

The view management screen displays in the right pane.

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

The view deployment has been cancelled: the view is no longer available in the Web Client.

EXPORTING ONE OR MORE VIEWS IN .SXA FORMAT

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

To do so:

1. In the left pane of the Administration Tool, click the sub-branch corresponding to the view that you want to export.

The view management screen displays in the right pane.

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

A dialog allowing to select the objects to export displays.

3. In the **Object** column of the dialog, check the checkboxes corresponding to the views that you want to export.

The checkboxes corresponding to the objects they depend on are automatically checked.

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

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 view(s) selected and the objects they depend on have been exported in the folder you chose.

IMPORTING ONE OR MORE VIEWS IN .SXA FORMAT

To import one or more views in the .sxa format into a GARGANTUA database and/or onto another server, proceed as follows:

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

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

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

The file explorer displays.

3. Browse to the folder where you have saved the .sxa export, and click **Open**.

A dialog allowing to select the objects to import displays.

4. In the **Object** column of the dialog, check the checkboxes corresponding to the views that you want to import.

The checkboxes corresponding to the objects they depend on are automatically checked.

5. In the **History** column, check the checkboxes corresponding to the objects for which you want to import the history of former versions.

6. Click **OK**.

A confirmation message displays.

7. Click **OK**.

The view(s) selected and the objects they depend on have been imported in the database you chose.



If objects with the same name as imported objects already exist in the database, imported objects are renamed “xxx (1)”.

DELETING A VIEW

To delete a view, proceed as follows:

1. In the left pane of the Administration Tool, click the sub-branch corresponding to the view that you want to delete.

The view management screen displays in the right pane.

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

A confirmation message displays.

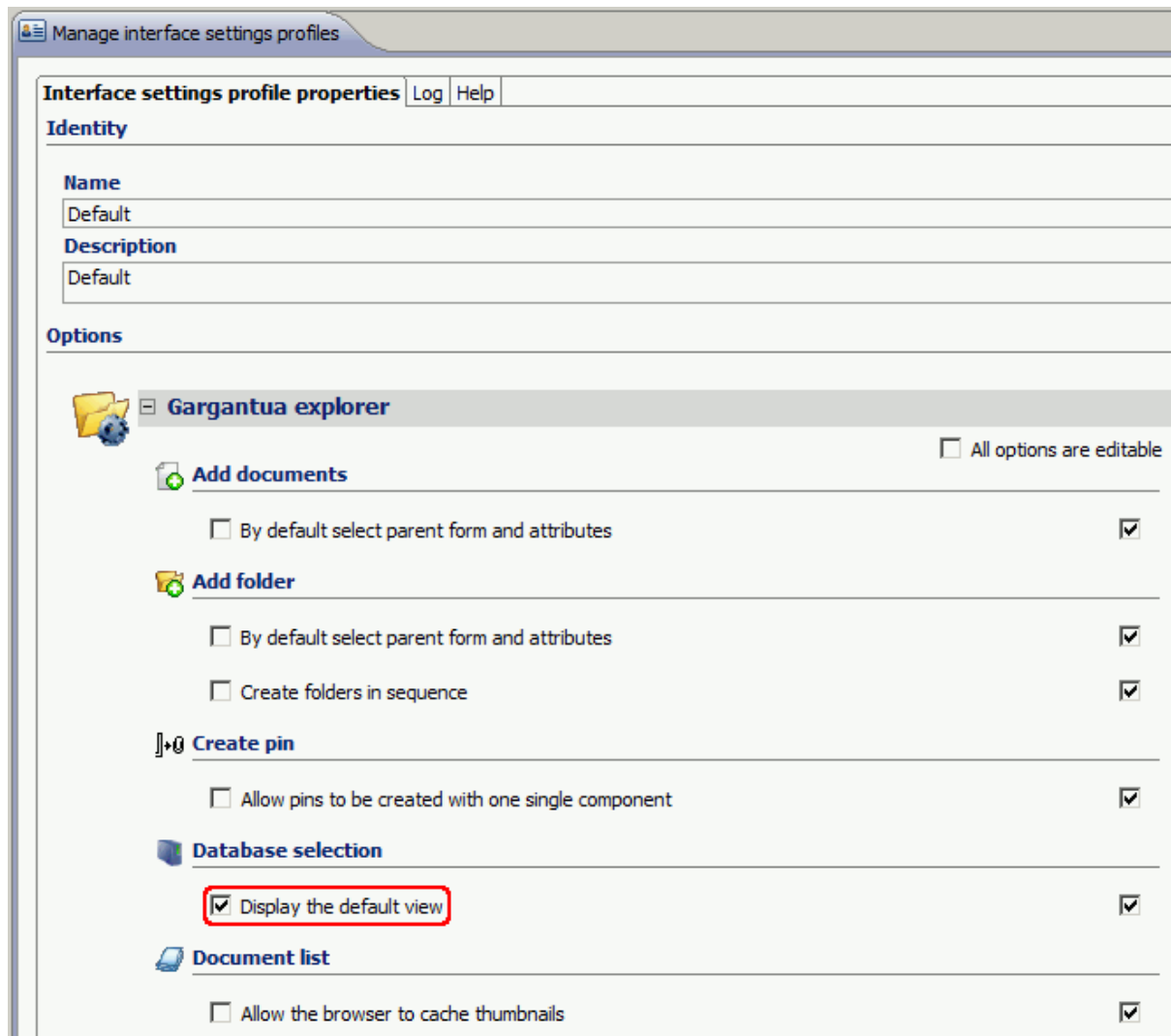
3. Click **Yes**.

The view has been deleted: it disappears from the left pane navigation tree.

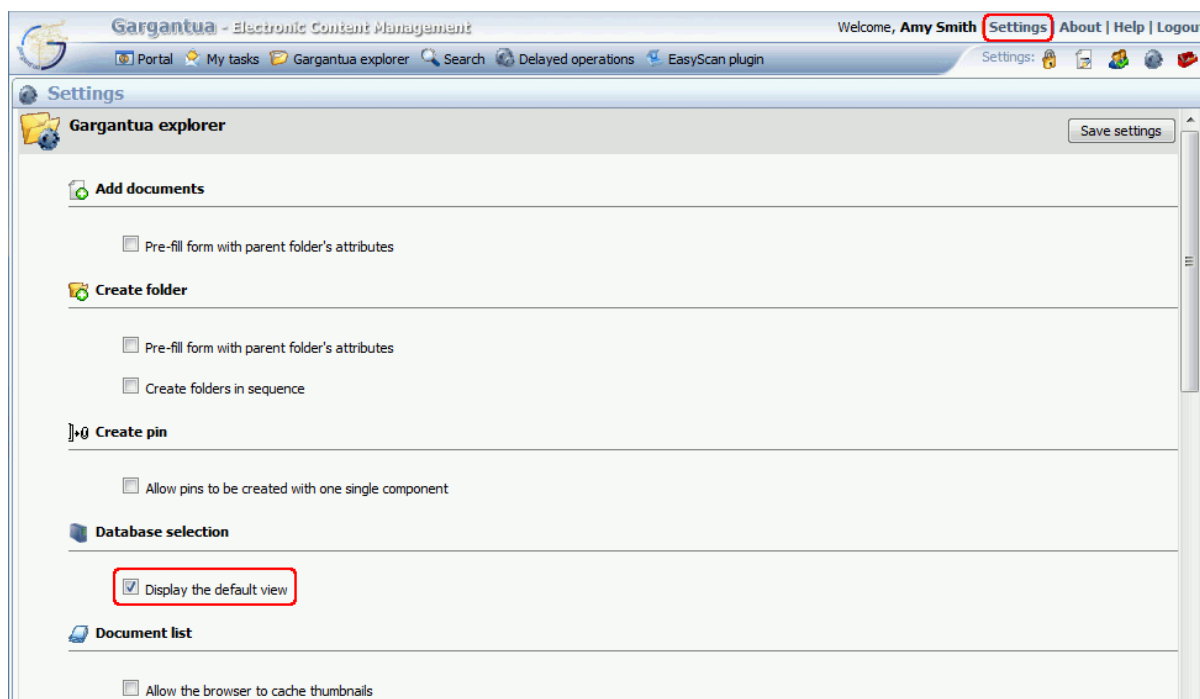
HIDING THE DEFAULT VIEW FROM THE WEB CLIENT USERS

Interface settings profiles allow you to hide the default view from one or several Web Client users, so that they can access the content of the GARGANTUA databases only from custom views.

To do so, uncheck the **Display the default view** checkbox in the **Gargantua explorer > Database selection** section of the corresponding interface settings profile:



If the checkbox making the option editable is checked, the Web Client users with the **Customize settings** privilege will be able to decide whether or not they want to use the default view:



PRACTICAL CONSIDERATIONS

If some Web Client users do not only view the content of a GARGANTUA database, but also contribute to it, it is usually better to give them access to the default view. Adding documents and/or folders through a custom view might cause problems.

GARGANTUA behavior is as follows:

- If a custom view contains actual folders, it is possible to add documents to them: the new documents will be available in the folders when switching to the default view.
- New folders can be added from a custom view, but in the default view they will be located at the root of the database: they cannot be created inside other folders.
- If a custom view only classifies documents, it is not possible to add new documents from it, because they would be located at the root of the database.



As a workaround, you can create from the default view a folder dedicated to adding documents and display it in the custom view.