

CQ5 Document Library User Manual (Draft)

Migration of the old webDMS:

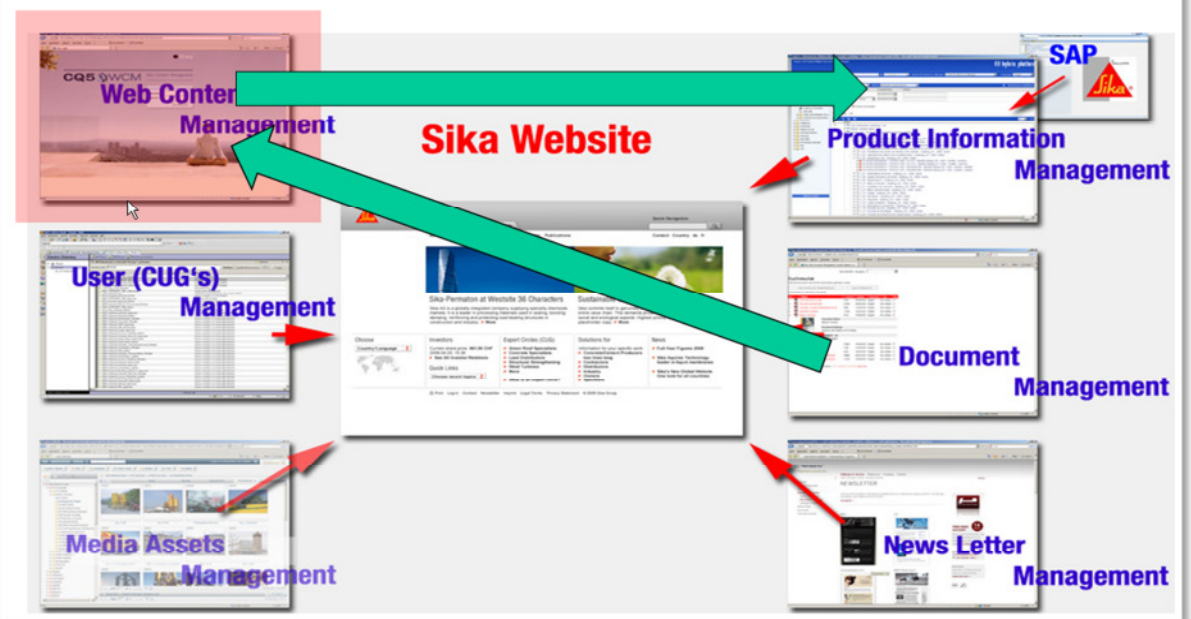


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1 The new Asset (Document) Library in CQ5

After the data migration from the old webDMS into the CQ5 system, all existing documents will be in the DAM of the Adobe CQ5 system. Additionally, you will see a new folder, called DMS in the navigation tree on your website.

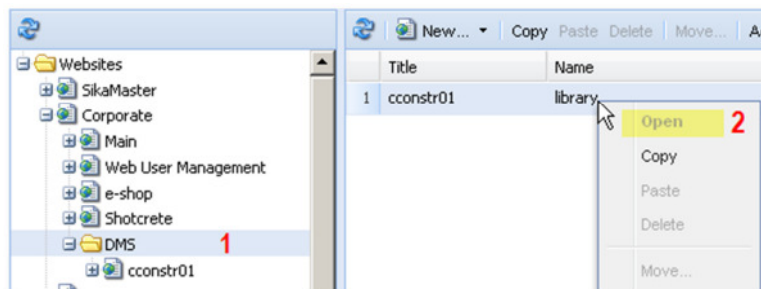
Your existing document classification (now also called document tagging), as well as the document types and the linking, between document types and classification, will now be also transferred to CQ5.

2 How to Enter the Document Library

The document library is the page where you can manage your documents, i.e.:

- Search for documents by classification or full text.
- Upload new documents.
- Edit documents (classify, activate and deactivate, update etc.)

In the navigation tree of your website explorer you will find the new folder DMS. Click on that folder and open the page *library* on the right. As opposed to websites the library page cannot be opened by doing a right click, due to permission reasons. Please open the page by double clicking on the page itself.



Picture: Entering the Document Library (Example Corporate)

1. Click on the folder icon DMS

2. The **Open** link in the right mouse click menu is not active, please open the page by double clicking on it.

The library will open in a new tab or a new window of your browser; this depends on the settings you have defined.

Note:

It will take some seconds before the page has been fully loaded. Without doing a search limitation, CQ5 will load the information of all existing documents in the background.



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Please enter keywords(s) Page 1 of 14 »

Search Results
320 results for "keyword(s)" found.

No	Download Name	Doctype	Lang	Format	Size	
1	Ballasted Roof	Sika at Work	English	pdf	0.58 MB	
2	100 Years of Durability: Sika-1 to Sik...	Brochures	English	pdf	4.53 MB	
3	200 Central Park South, New York, U...	Sika at Work	English	pdf	0.91 MB	
4	67 Meter Slip Forming Chimney	Sika at Work	English	pdf	0.69 MB	
5	76 Morgan Street Wagga Wagga HS...	Sika at Work	English	pdf	0.14 MB	
6	Abu Dhabi International Airport	Sika at Work	English	pdf	0.60 MB	
7	Adhered Roof Public Building Austr...	Sika at Work	English	pdf	0.30 MB	
8	Adhered Roof, Spalladium Arena Split	Sika at Work	English	pdf	0.45 MB	
9	Al Areen Water Park, Bahrain	Sika at Work	English	pdf	1.02 MB	
10	Automotive Industry	Brochures	English	pdf	1.10 MB	
11	Award Winning Stadium Restoratio...	Sika at Work	English	pdf	0.70 MB	
12	Basement Waterproofing at La Mala...	Sika at Work	English	pdf	1.02 MB	
13	Basement Waterproofing at Sky Offi...	Sika at Work	English	pdf	0.51 MB	
14	Basement Waterproofing at the Gol...	Sika at Work	English	pdf	0.98 MB	
15	Bitexco Financial Tower Ho Chi Min...	Sika at Work	English	pdf	1.21 MB	
16	Bridge Strengthening	Sika at Work	English	pdf	0.36 MB	
17	Bridge Strengthening	Brochures	English	pdf	0.99 MB	
18	Bridge Strengthening with CFRP	Sika at Work	English	pdf	1.49 MB	
19	Bridge and Jetty Case Studies	Sika at Work	English	pdf	0.45 MB	
20	Brinker, Hedgcoxe & Daffron Eleme...	Sika at Work	English	pdf	0.49 MB	
21	Brisbane Airport Link-Waterproofin...	Sika at Work	English	pdf	0.71 MB	
22	Bypass Lungern, Switzerland	Sika at Work	English	pdf	0.94 MB	
23	Car Park Solutions UK	Sika at Work	English	pdf	0.59 MB	
24	Car Park Specified Solutions	Sika at Work	English	pdf	1.20 MB	

Limit your Search Results
Please select topics to limit your search results.

- Language
- Doctypes
- Classifications
 - Application Field
 - Brandfamily
 - Country
 - Hard Fact Edition
 - Keyword
 - Project Type
 - Year

Search for missing information

- Missing doctype
- Missing classification
- Missing language

Actions

- Edit Asset
- Activate
- Upload
- Deactivate
- Delete

Picture: Document (Asset) library

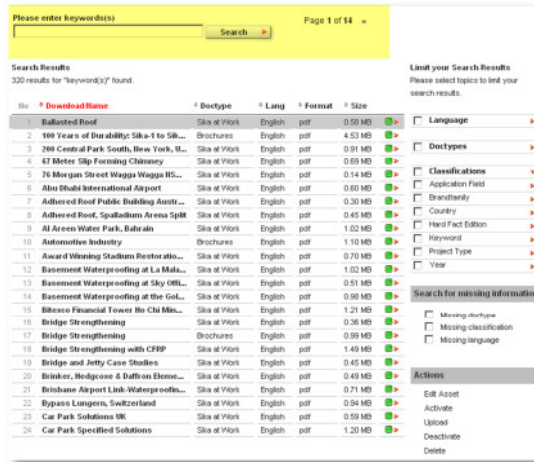


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2.1 Activities in the Document Library

2.2 Full Text Search

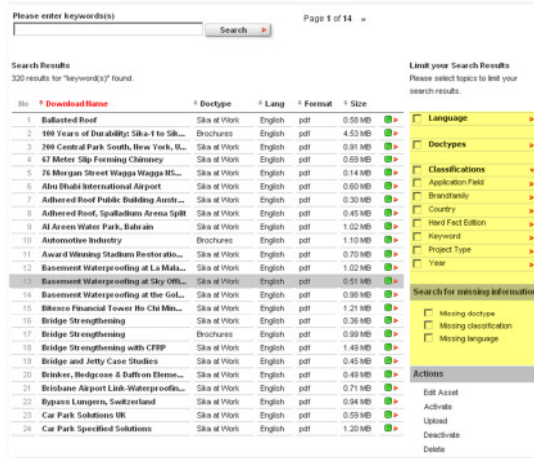


Picture shows the full text search field

In the top area you have the possibility to do a full text search for a document. All information of a document will be included in the search, i.e.:

- File name
- Document content
- Meta-tags of the document

2.3 Search by Classification



Picture shows the search by classification area

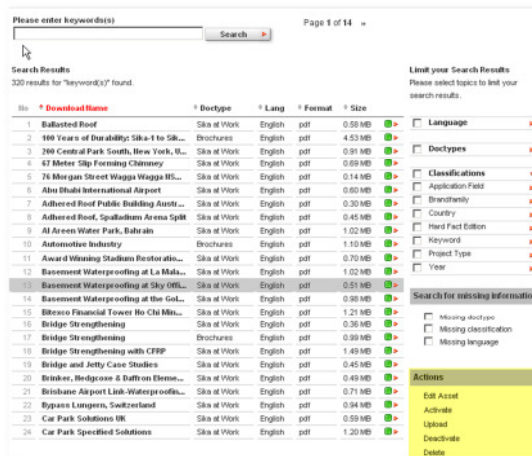
On the right of the page you can search for a document by choosing the language, document type and/or classification.

It is also possible to search for documents without any classification or document type in the area Search for missing information.



2.4 Document Actions

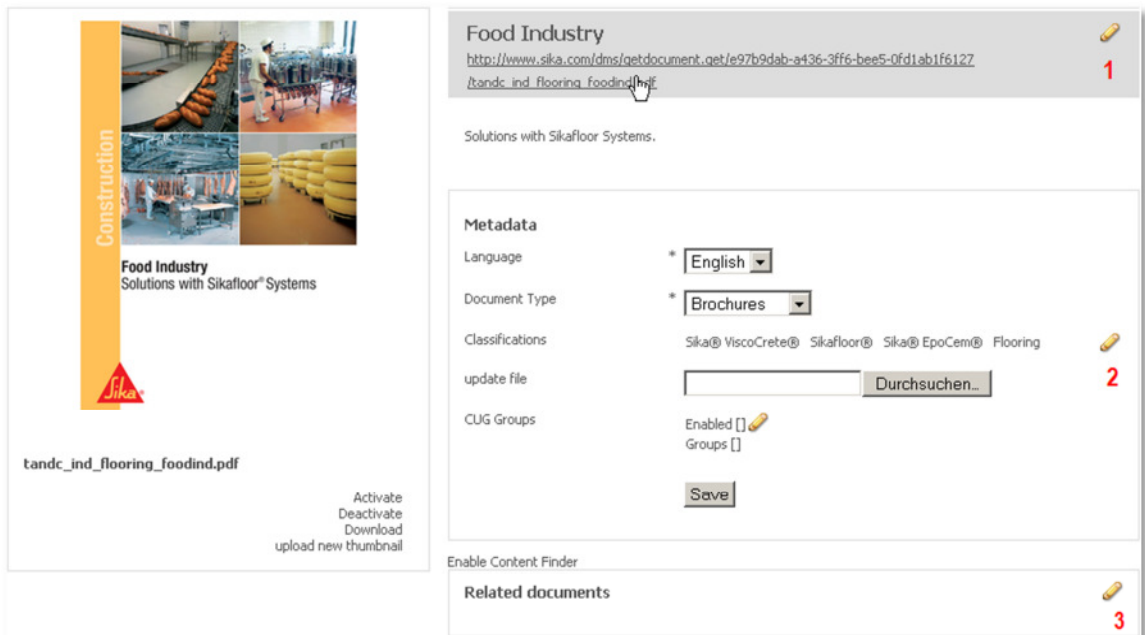
The section 'Actions' shows all the tasks available for documents.



Pictures show Actions area

2.4.1 How to Edit an Asset (Document)

After choosing a document (click once on the document) in the search result list, you will be able to Edit the Asset, when you click on the Edit Asset link. The system will open the document in a new window or tab.

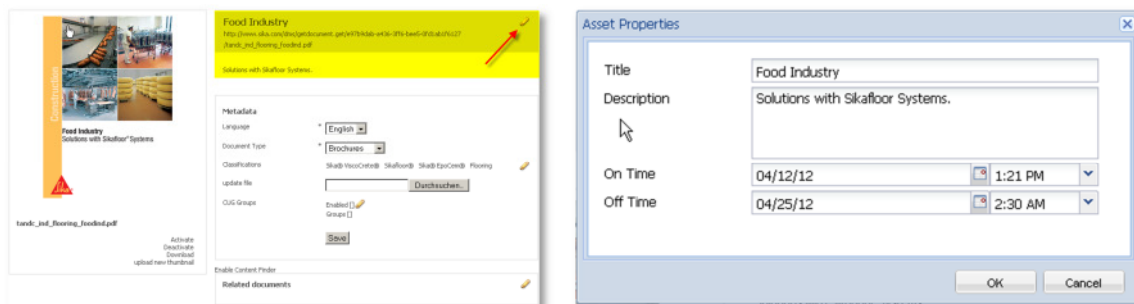


Picture shows the Asset (Document) edit window.

As you can see, the preview icon of the document is created automatically by CQ5, but you have the possibility to replace the actual icon with one of your choice. Additionally, here it is possible to activate, deactivate or download the document.



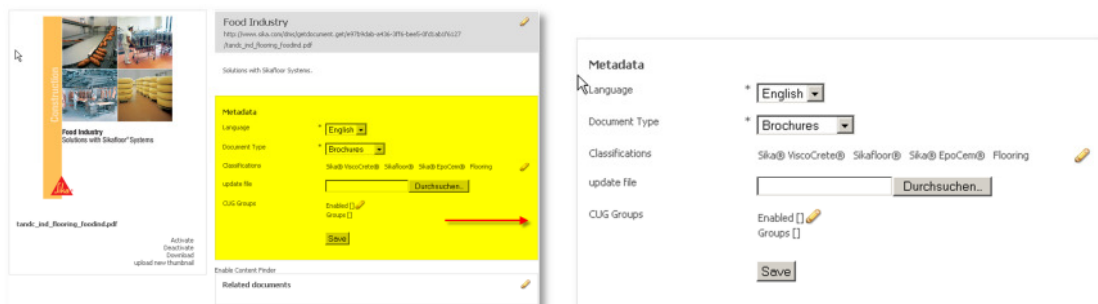
If you would like to add or change the document properties, click on the pen icon in area **1**:



Picture shows the Asset (Document) properties window.

Field	Description
Title	Add or change the title of the asset.
Description	Add or change the short description of the document.
On time	If needed, set publishing date and time.
Off Time	If needed, set publishing end date and time.

In area **2** you can change or add different document meta data:



Picture shows the Asset (Document) Metadata window.

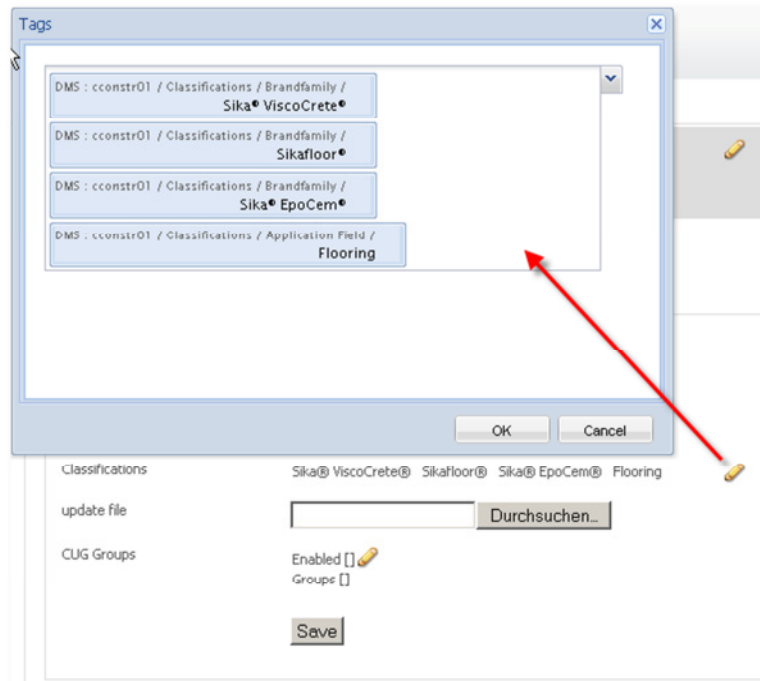
Field	Description
Language	Choose the right language for the document.*
Document Type	Choose the right document type.*
Classification	Define here the tagging of the document out of the predefined tags.*
Update file	Upload a new version of the existing document.
CUG (Closed User Groups)	If the document is only relevant to a specific closed user group, choose the right group by clicking on the pen icon.

*How to add, delete or change a language, document type or a classification, please read in chapter 3.



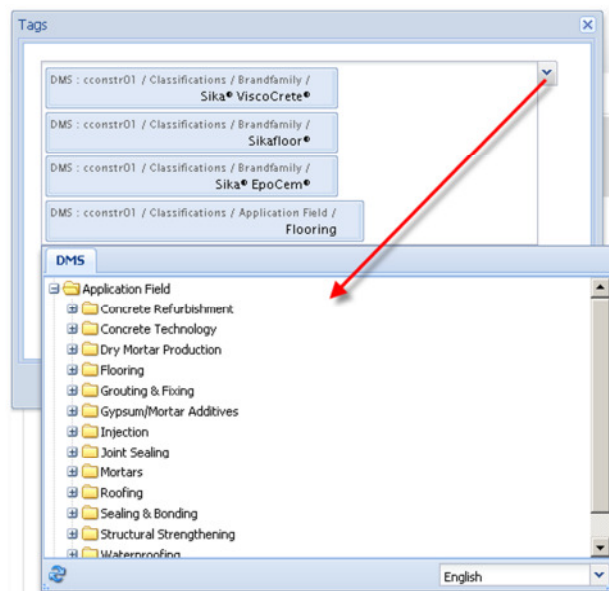
Note:

When you have added language and document type, you first have to save the data before you can add the classification values (tagging).

2.4.1.1 Description how to classify a document:

Picture shows the classification values of the asset.

In the pop up window you see the defined classification values. If needed, add more classification tags by clicking on the dropdown button.



Picture shows the classification values window.

To add a new tag just click on the tag name and the system will add it to the list in the root



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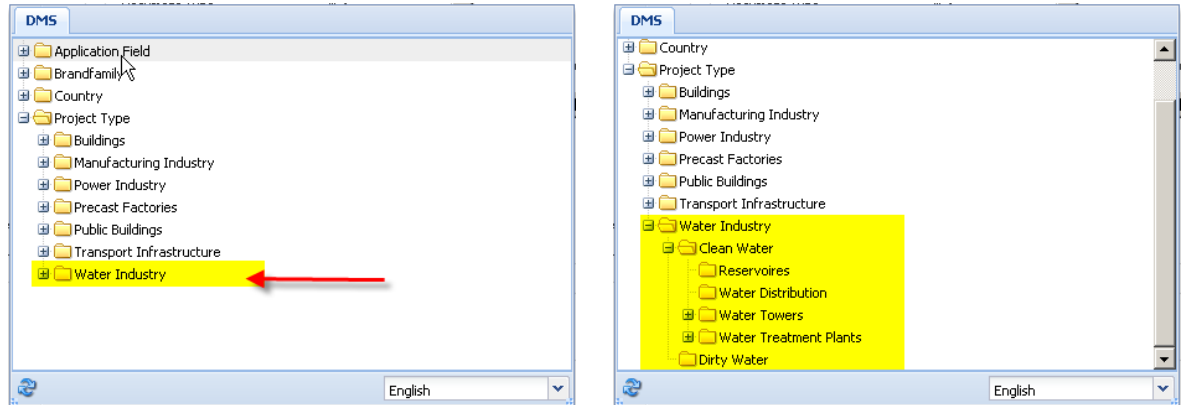
window.

To close the DMS window, just click in the area of the Tags window and do not forget to save the changes by clicking the OK button.

Note:

Ensure that you always add the lowest level of the classification structure, otherwise the system will add all tags from the lower level.

Example:

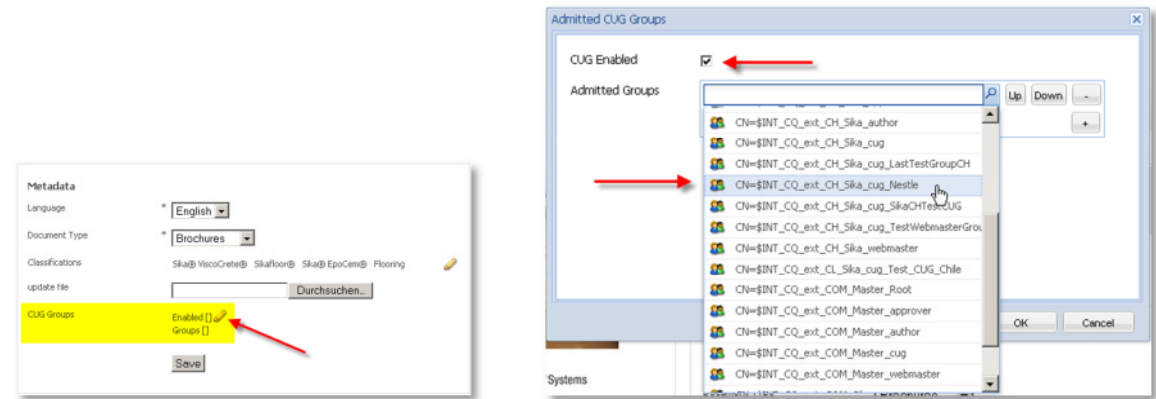


For example if you choose 'Water Industry', the system will add all sub tags underneath 'Water Industry'.

Unfortunately, in front of an empty folder there is also a + icon, this comes from the system and cannot be changed.

2.4.1.2 How to handle documents for CUG (Closed Use Group):

If the document is only relevant to a specific closed user group or more than one group, choose the right group by clicking on the pen icon.



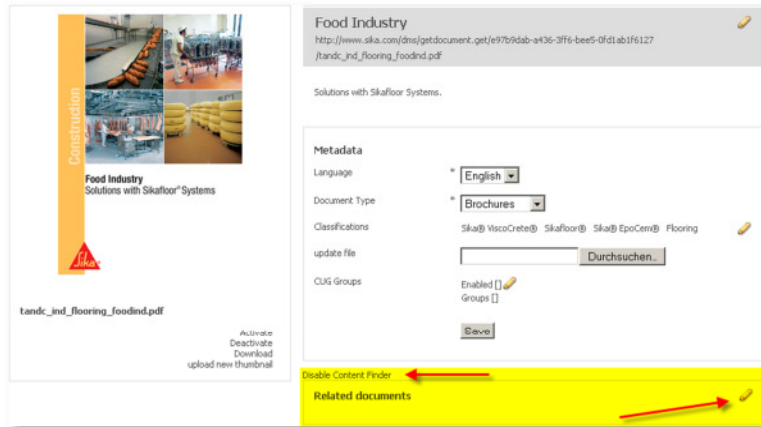
Field	Description
<i>CUG Enabled</i>	Tic the box if the document is relevant to a CUG.
<i>Admitted Groups</i>	Choose the CUG



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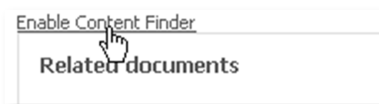
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2.4.1.3 How to add related documents:

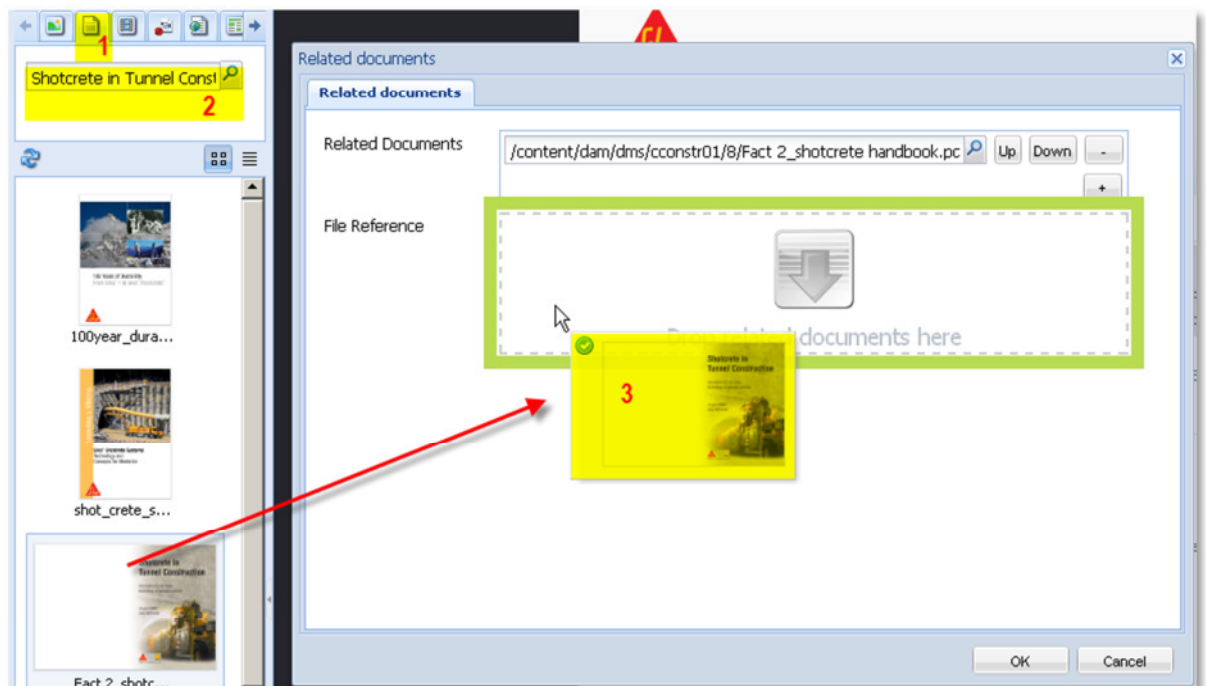


Picture shows the area to add related documents

To add related documents, first click on Enable Content Finder at the top of the highlighted area, in case it is actually not activated:



Then click on the pen icon to open the 'Related documents' window.

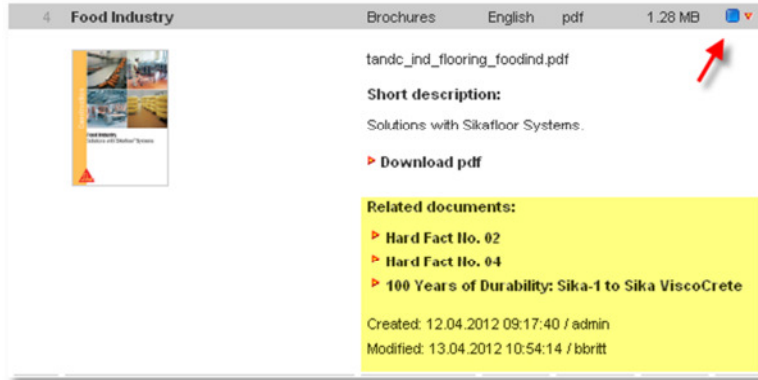


Picture shows how to move a related document out of the content finder.

- Step 1:** Activate the Documents tab.
- Step 2:** Enter the search information for the document such as file name, document title, some specific text, etc.
- Step 3:** Move the related document to the 'Related documents' window



You immediately see the result in the document list:

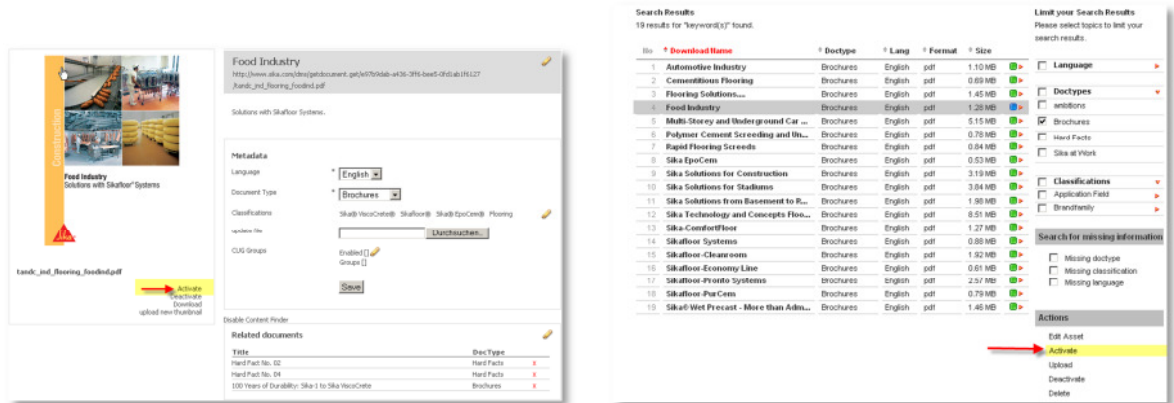


Picture shows the information change after adding some related documents.

The related document information is also shown in the new CQ5 document components, see chapter 4.

Note:

After changing some document properties, the document status will be changed to modified. If you would like to publish the changes, activate the document either in the *document edit window* or in the search result list in the section *Actions*:



Picture: activate the document modifications in the document edit window or in the search result list

2.4.2 How to activate a document

No.	Download Name	DocType	Lang	Format	Size	Actions
13	Basement Waterproofing at Sky Offi...	Sika at Work	English	pdf	0.51 MB	Activate
14	Basement Waterproofing at the Gol...	Sika at Work	English	pdf	0.98 MB	Activate
15	Bitexco Financial Tower Ho Chi Min...	Sika at Work	English	pdf	1.21 MB	Activate
16	Bridge Strengthening	Sika at Work	English	pdf	0.36 MB	Activate
17	Bridge Strengthening	Brochures	English	pdf	0.99 MB	Activate
18	Bridge Strengthening with CFRP	Sika at Work	English	pdf	1.49 MB	Activate
19	Bridge and Jetty Case Studies	Sika at Work	English	pdf	0.45 MB	Activate

Picture: Deactivated document

If a document has been uploaded, the status will be deactivated and therefore it will not have been published on the internet. Deactivated documents are marked with a small red icon in the search result list.

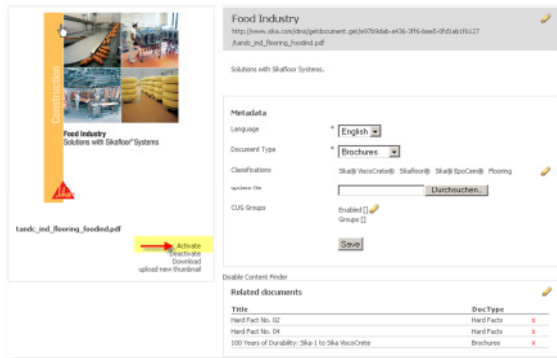
To activate the document just click the word *Activate* in the **Actions** corner. After refreshing the page you will see the change:



								Actions
13	Basement Waterproofing at Sky Offi...	Sika at Work	English	pdf	0.51 MB			
14	Basement Waterproofing at the Gol...	Sika at Work	English	pdf	0.98 MB			Edit Asset
15	Bitexo Financial Tower Ho Chi Min...	Sika at Work	English	pdf	1.21 MB			Activate
16	Bridge Strengthening	Sika at Work	English	pdf	0.36 MB			Upload
17	Bridge Strengthening	Brochures	English	pdf	0.99 MB			Deactivate
18	Bridge Strengthening with CFRP	Sika at Work	English	pdf	1.49 MB			Deactivate
19	Bridge and Jetty Case Studies	Sika at Work	English	pdf	0.45 MB			Delete

Picture: Activated document

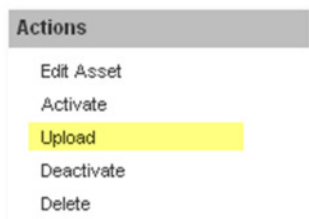
It is also possible to activate a document directly after the upload in the document edit page:



Picture: Activate a document directly after the document upload

To activate a document right after uploading and classifying (tagging) it, you just have to click on the word *Activate* in the left area of the window.

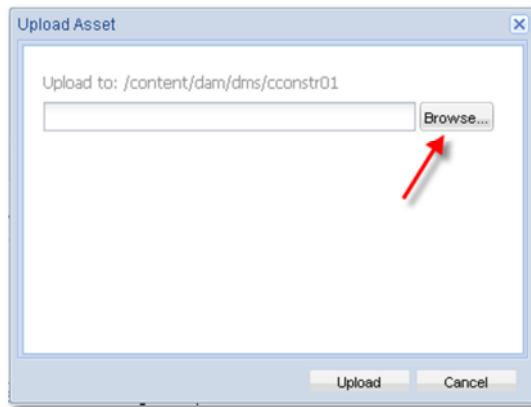
2.4.3 How to upload one or more documents



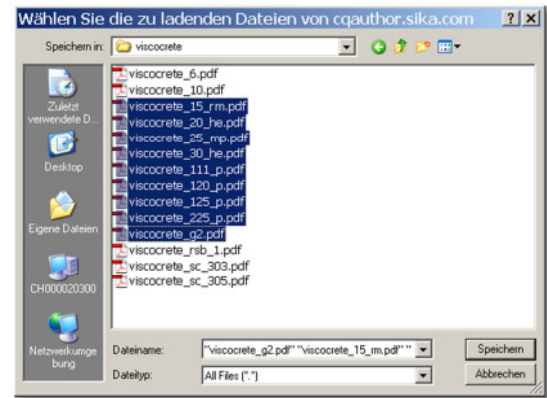
Picture: How to upload documents

If you need to upload one or more new documents to the library just open the upload window by clicking the word *Upload* in the **Actions** area. You will then be able to browse for one or several documents from your local hard disc or server.





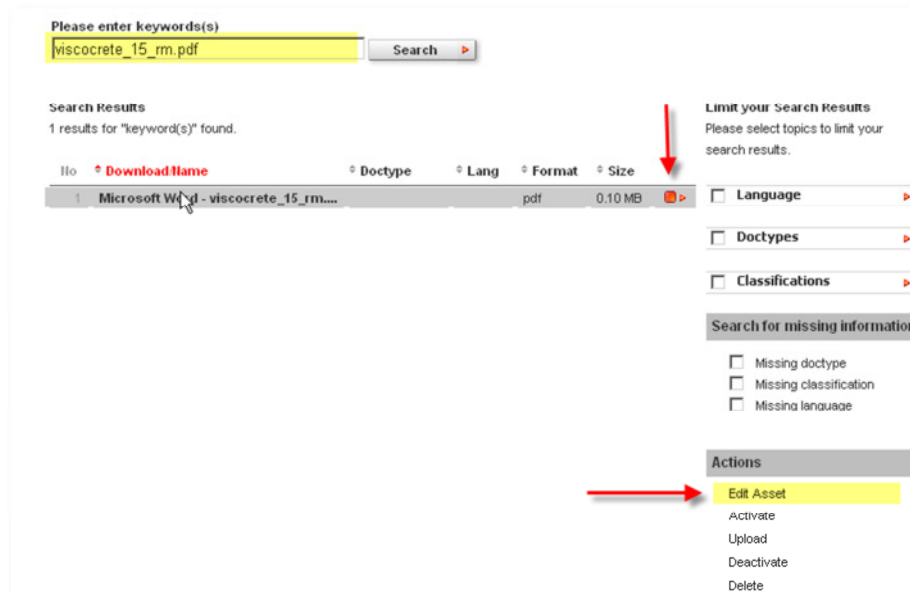
Picture: Browse for new documents



Picture: Choose one or several documents

After uploading the documents you have to classify them. If you have only uploaded one, the system will show you the document edit window, where you can add all important document information. Read chapter 2.4.1 how to do this.

If you have uploaded more than one document you have to search for it first. The best way is to copy and paste the document file name in the full text search field and press the search button:



Picture: After uploading more than one document, search it by pasting the document file name in the full text search field.

Now click once on the document and click on 'Edit Asset' to add document information and define the classification.

Note:

Please do not forget to activate the document!

2.4.4 How to proceed for a mass document upload

Every year you maybe have to review your PDS or MSDS documents and to upgrade the



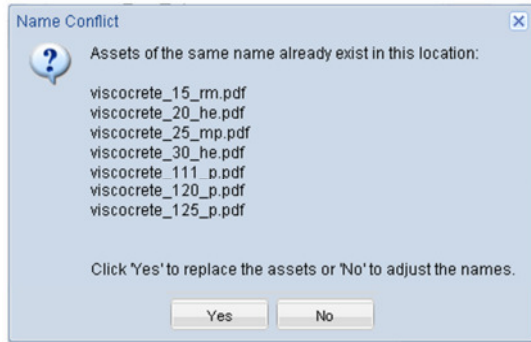
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existing ones. In the new CQ5 library there is an easy way to do this. The important thing is, that the file names of the new documents are exactly the same as the existing ones in the CQ5 library.

Before you start the upload process, put all files in one directory on your local hard disc or local server. Then proceed in the same way as you do when you upload one or more documents (see chapter 2.4.3).

When you click on the upload button, CQ5 will recognize that you are starting to upload existing documents and will ask if you really want to replace all the documents.



Picture: Replacing existing documents in the CQ5 library

Click yes to agree and to start the update for all documents. As far as we know, there is no limitation of the number of documents which you can update in that way.

Note:

We strongly recommend creating a naming concept for the documents which you regularly have to update in your country.

2.4.5 How to deactivate a document



Picture: Deactivating a document

To deactivate a document, search for it and after highlighting the document in the search result list, click on deactivate. After reloading the page you will see, that the colour of the icon has changed from green to red:



Picture: After searching for the document click on deactivate and reload the page.



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							Actions
18	Bridge Strengthening with CFRP	Sika at Work	English	pdf	1.49 MB		
19	Bridge and Jetty Case Studies	Sika at Work	English	pdf	0.45 MB		Edit Asset
20	Brinker, Hedgecoxe & Daffron Eleme...	Sika at Work	English	pdf	0.49 MB		Activate
21	Brisbane Airport Link Waterproofin...	Sika at Work	English	pdf	0.71 MB		Upload
22	Bypass Lungern, Switzerland	Sika at Work	English	pdf	0.94 MB		Deactivate
23	Car Park Solutions UK	Sika at Work	English	pdf	0.59 MB		Delete
24	Car Park Specified Solutions	Sika at Work	English	pdf	1.20 MB		

Picture: Reloading the page shows the colour change of the icon.

2.4.6 How to delete a document



Picture: The document delete button in the document actions area

To delete a document in the CQ5 library just search for the document, highlight it in the search result list and click on the word *Delete* in the *Actions* area. The system will warn you in a pop-up window which you have to accept by clicking the yes button.

3 How to use the Library related Components

In the CQ5 system, three new components are implemented to display documents or document groups:

- QueryBuilder component used to create the download center
- Document List component used to display a specific document group
- Document View component used to display a single document

3.1 The Sika DMS QueryBuilder Component

What it is for:

The component *Sika DMS QueryBuilder* has the functionality of a document download center. It shows the full document list and enables the user to limit the search result to document types and classifications. It also includes a field for a full text search.

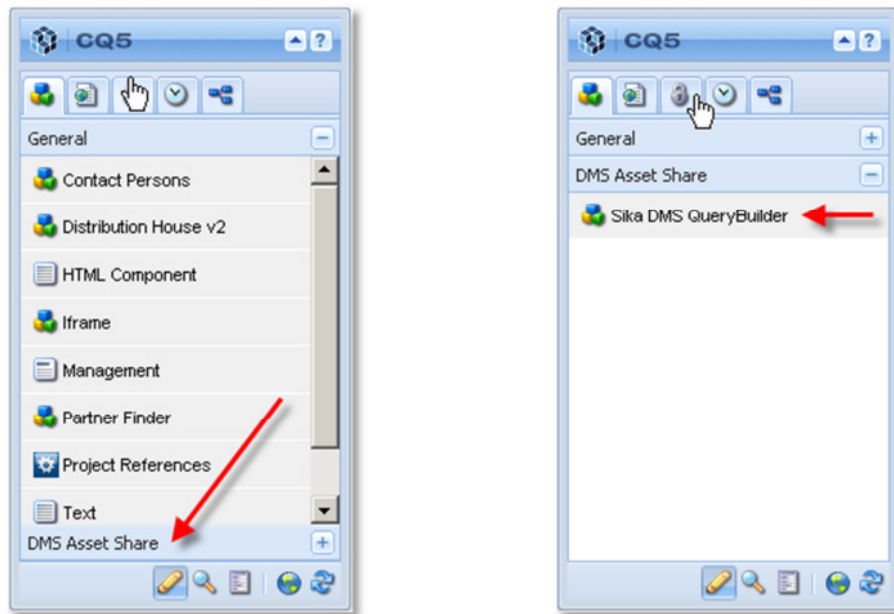
How to add it:

The component can only be added to a *Wide Content Page*. Create the page and move the component out of the sidekick into the page.

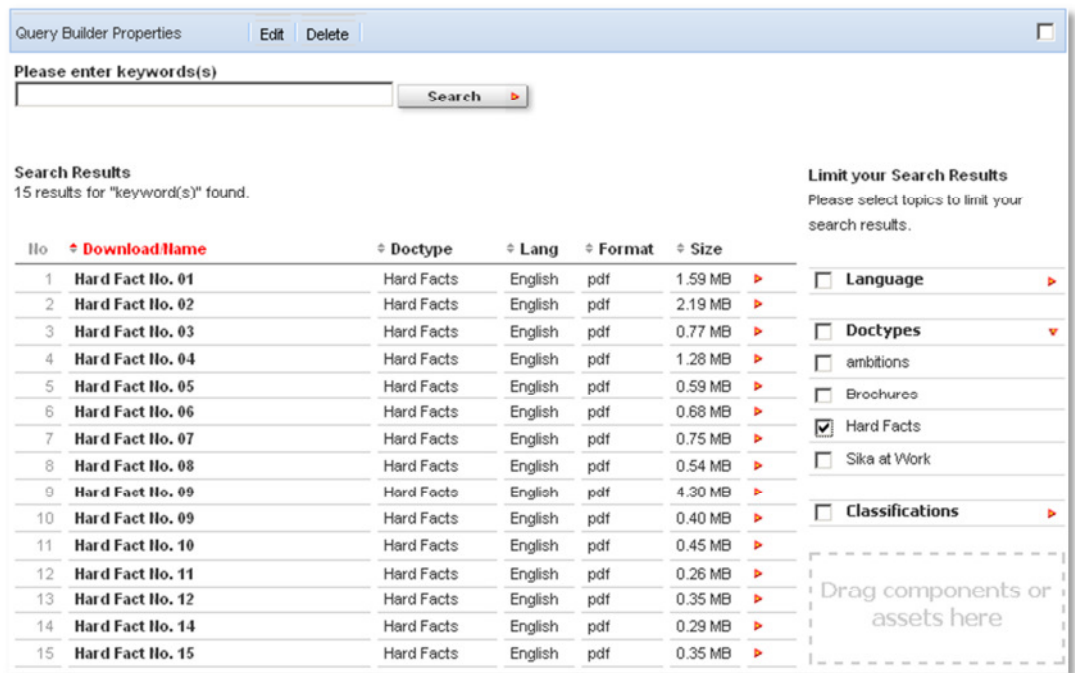


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Picture shows the component Sika DMS QueryBuilder in the sidekick.



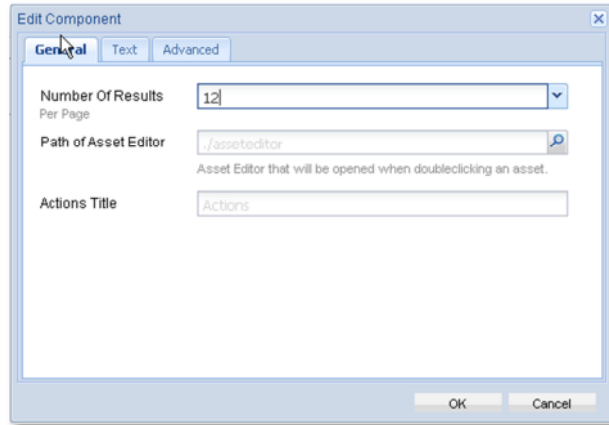
Picture shows the Sika DMS QueryBuilder component



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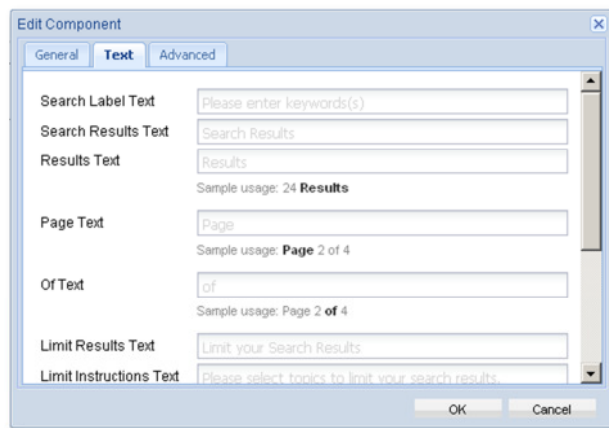
3.1.1 Sika DMS QueryBuilder Settings: General



Picture: Sika DMS QueryBuilder, settings General

Field	Description
<i>Number of Results</i>	Set the number of result lines displayed in one page.
<i>Path of Asset (Document) Editor</i>	No action needed
<i>Actions Title</i>	No action needed

3.1.2 Sika DMS QueryBuilder Settings: Text

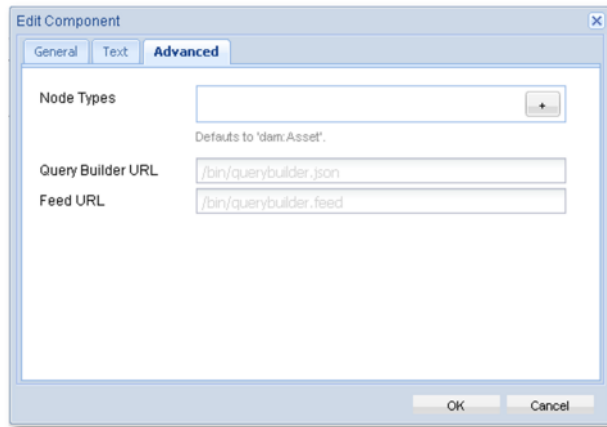


Picture shows the Sika DMS QueryBuilder, settings Text

Field	Description
<i>Results Text</i>	No action needed
<i>Page Text</i>	No action needed
<i>Of Text</i>	No action needed



3.1.3 Sika DMS QueryBuilder Settings: Advanced

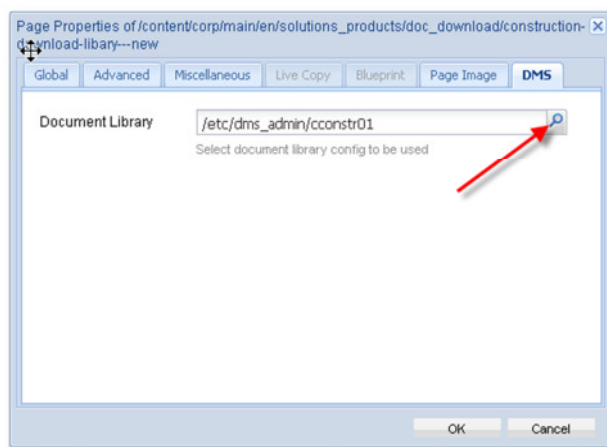


Picture shows the Sika DMS QueryBuilder, settings Advanced

Field	Description
Node Types	No action needed
Query Builder URL	No action needed
Feed URL	No action needed

3.1.4 Adding the Path to your Library

To set the path to the library, access the page properties:



Picture shows the page properties in the tab DMS, to define the path to the used DMS.

The path to your CQ5 library must be defined in the properties of the page where you want to implement the Query Builder Component. The name of the library is always the old name given in the old webDMS:

Example: The old URL for the webDMS was <http://webdms002.ch.sika.com:8080/my01>. The yellow highlighted string is now the name of the DMS in CQ5.

Note:

Keep in mind that it is only possible to place the Query Builder Component in a wide content



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page.

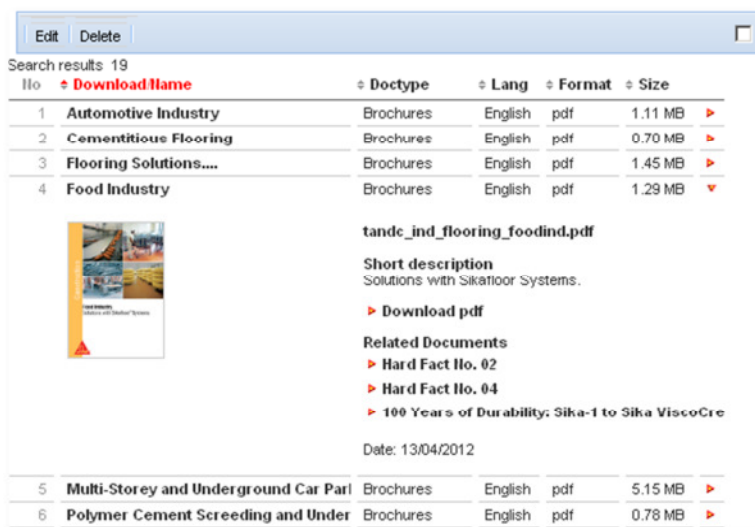
3.2 The Document List Component

What it is for:

The *Document List* component allows you to show a list of assets (documents) from your library, based on an individual defined search query.

How to add it:

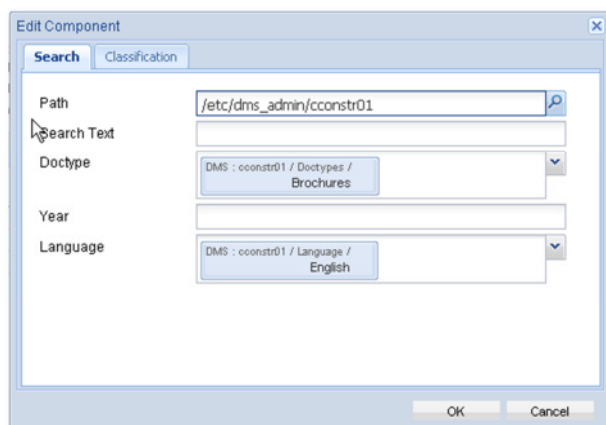
Choose the component *Document list* from the sidekick and move it to the page content area in the middle of the page. The *Document list* component can only be placed on a page based on the content page template.



Picture: Shows the result of a Document List component.

In the 'Edit Component' window you now have the possibility to define a specific search (or also called a query) to a group of documents.

3.2.1 Document List settings: Search



Picture shows Document List settings Search

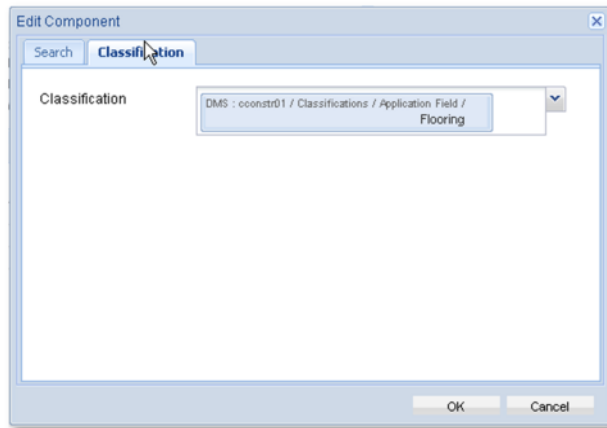


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Field	Description
<i>Path</i>	Select the document library
<i>Search Text</i>	Enter some search text
<i>Doctype</i>	Select none, one or more doctypes
<i>Year</i>	n.a. (bitte ALo fragen)
<i>Language</i>	Enter a document language

3.2.2 Document List settings: Classification

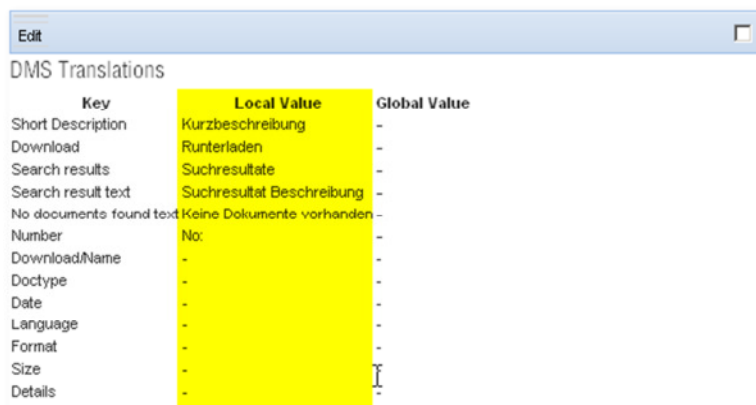


Picture: Document List, settings Classification

Field	Description
<i>Classification</i>	Select none, one or more classifications

Note:

Check out the language template of your website if you would like to translate or change some predefined text in the document list component:



Picture: Language template
If necessary translate the given terms in the DMS Translation section.



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3.3 The Document View Component

What it is for:

The *Document View* component is used to show a single asset (document) from your document library.

How to add it:

Choose the component *Document view* from the sidekick and move it to the page content area in the middle of the page. This component can also only be placed on a page based on the content template.

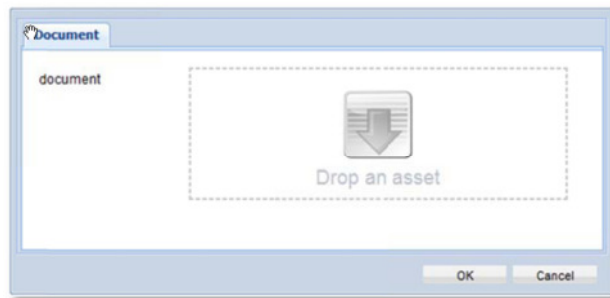


Picture shows the Document View component:

- 1 Document title set in the old webDMS
- 2 Document file name
- 3 Short description out of the old webDMS
- 4 Automatically generated link
- 5 If related documents are defined for the main document, it will also be displayed here.

Additionally the SEO important picture <alt> information is also automatically created out of the document title.

3.3.1 Document View settings: Search



Pictures show the Document View component

Window	Description
Document	Drag and drop any document from the content finder on the left

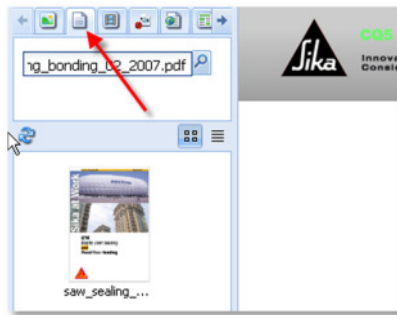
Note:

The best way to find a specific document is by entering the file name in the search field of the content finder on the left!



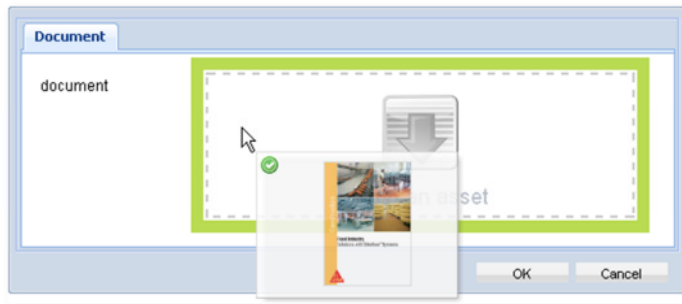
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Picture shows search for a document in the content finder.
Chose the second tab called Documents.

Enter the file name or part of it in the search field.



Picture shows move the Document view component.

Note:

Check out the language template of your website if you would like to translate some predefined text:

Key	Local Value	Global Value
Short Description	Kurzbeschreibung	-
Download	Runterladen	-
Search results	Suchresultate	-
Search result text	Suchresultat Beschreibung	-
No documents found text	Keine Dokumente vorhanden	-
Number	No:	-
Download/Name	-	-
Doctype	-	-
Date	-	-
Language	-	-
Format	-	-
Size	-	-
Details	-	-

Picture: Language template

If necessary translate the given terms in the DMS Translation section.

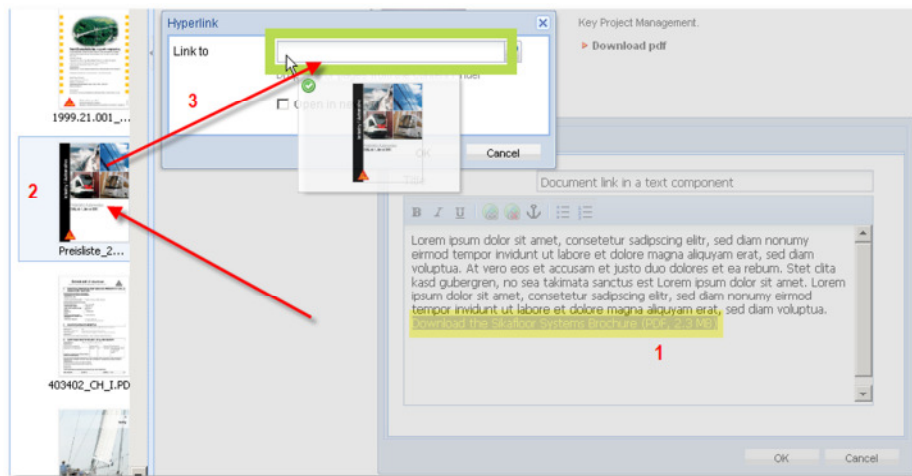
3.4 Adding a Document Link in a Text Component

It is also possible to add a document link in a component that includes some text.



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Picture: Language template

- 1 Create a link text in a text field and press on the link icon in the tool bar
- 2 Choose the document in the content finder
- 3 Move the document icon by drag and drop to the link field

In the same way you can add a document link to a *picture text* component.

Note:

If you would like to add a link to a document that is stored in the CQ5 library to a *Linklist* component or a *Double Quick Linklist* component, first search for the document in the library and then copy the complete URL to the document edit window.



Picture: Complete document URL in the document edit window of the CQ5 library



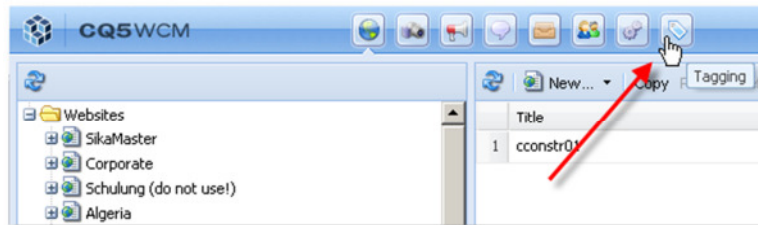
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4 How to maintain Document Types and Classifications

Adding a new language, document type or a new classification has to be done in CQ5 in the Tagging area.

4.1 CQ5 Icon: Tagging

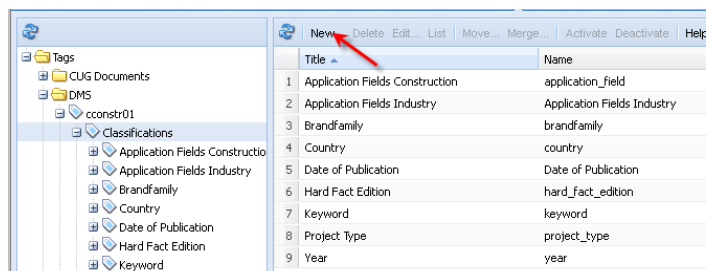


Picture: Click the Tagging icon in the tool bar to add or change language, document types or classification values.

Click on the tagging icon in the tool bar to enter the tagging area.

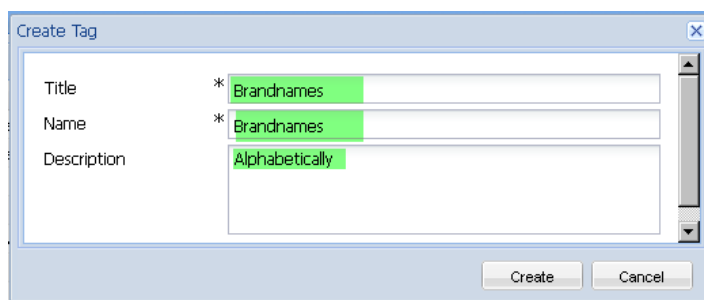
4.2 Create new Classification

Select "Classification" and click on "New".



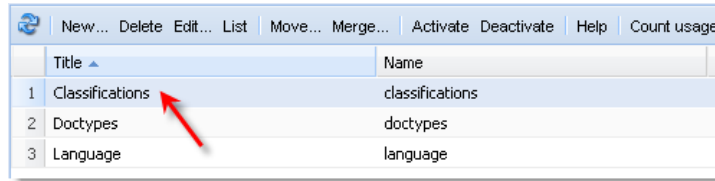
Picture: Create new Classification

Add in now the Title and Name. The Description is not mandatory. Click on "Create".



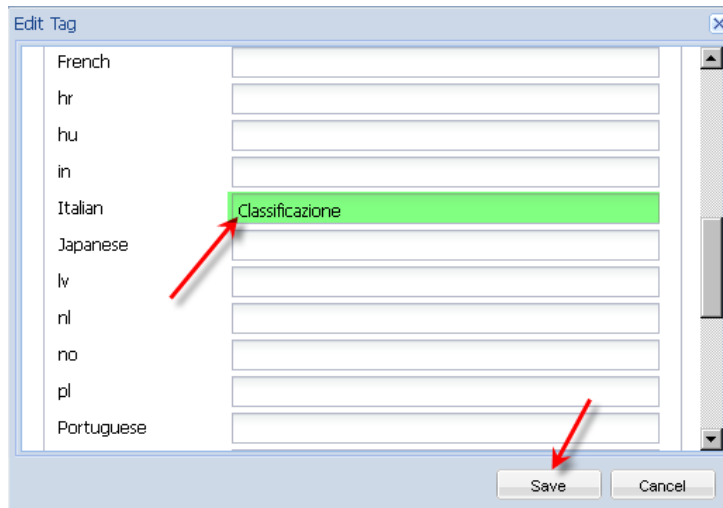
Picture: Create new Classification – add in title and name

Translation: Make a double click e.g. "Classification"



Picture: Select the tag e.g. classification

Search for your country language and add in the text in your country language

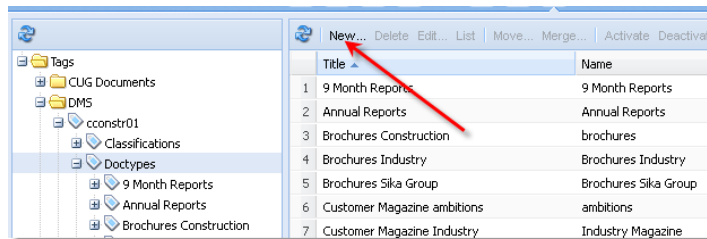


Picture: Translate the document name into your country language



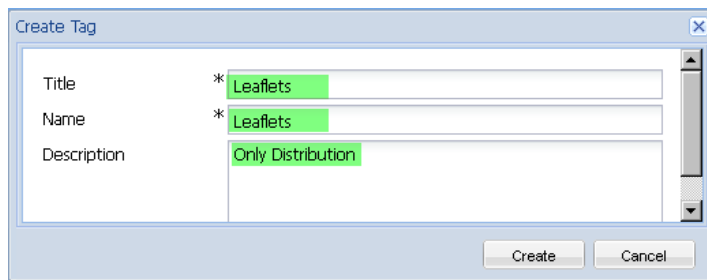
4.3 Create new Document Type

Select “Doctypes” and click on “New”.



Picture: Create new Doctype

Add in now the Title and Name. The Description is not mandatory. Click on “Create”.



Picture: Create new Doctype – add in title and name

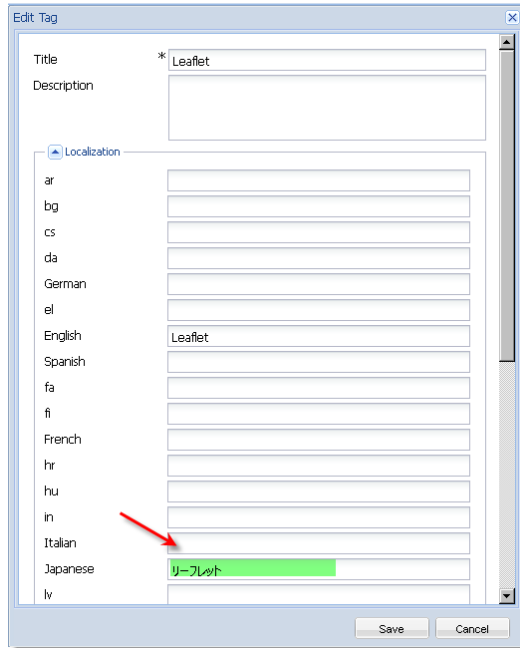
Translation: Make a double click e.g. “Leaflet”

	Title	Name
1	Brochure	brochure
2	Colour Chart	colour_chart
3	Leaflet	leaflet
4	Material Safety Data Sheets	material_safety_datasheets
5	Newsletter	newsletter
6	Product Data Sheets	product_data_sheets
7	Publication	publication

Picture: Select the document



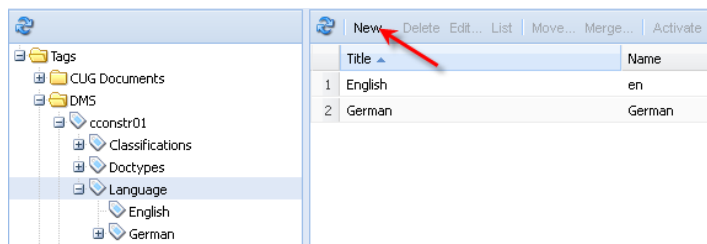
Search for your country language and add in the text in your country language



Picture: Translate the document name into your country language

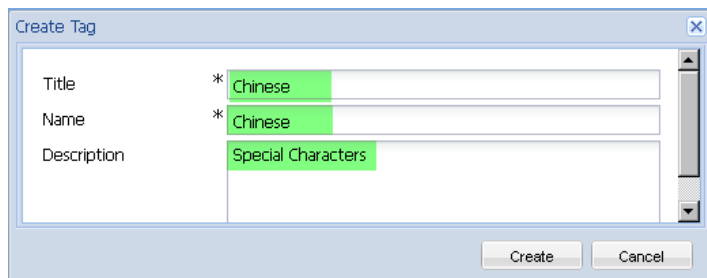
4.4 Create new Language

Select "Language" and click on "New".



Picture: Create new Language

Add in now the new language. The Description is not mandatory. Click on "Create".

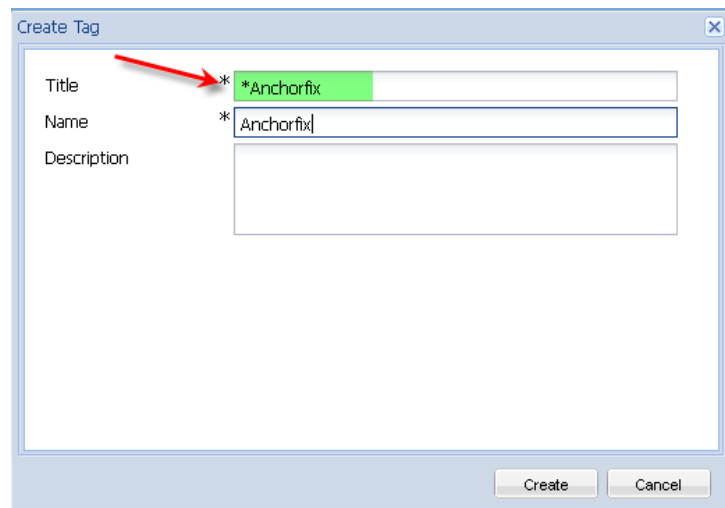


Picture: Create new Language – add in the name of language



4.5 Create new Product- or Product Family Name

Note: If you create new Product- or Product Family Names then you can add such a name with an asterisk only in the Title line. In the Name line you must add the name without an asterisk.



The screenshot shows a 'Create Tag' dialog box with three input fields: 'Title', 'Name', and 'Description'. The 'Title' field contains the text '*Anchorfix', with the asterisk and the word highlighted in green. A red arrow points to the asterisk. The 'Name' field contains the text 'Anchorfix'. The 'Description' field is empty. At the bottom right, there are two buttons: 'Create' and 'Cancel'.

Picture: Create new name



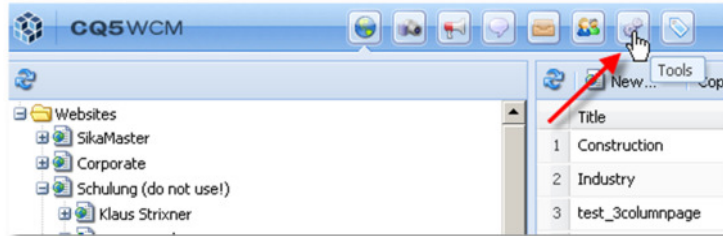
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5 How to match Document Types to Classifications

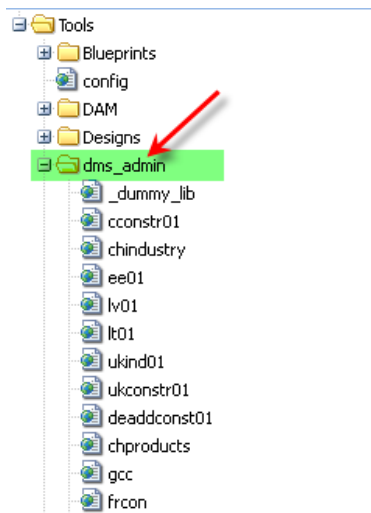
5.1 Matching Document Type and Classification

Click on the Tools icon in the tool bar to enter the Tools area.



Picture: Click the Tools icon to do the matching between document types and classifications

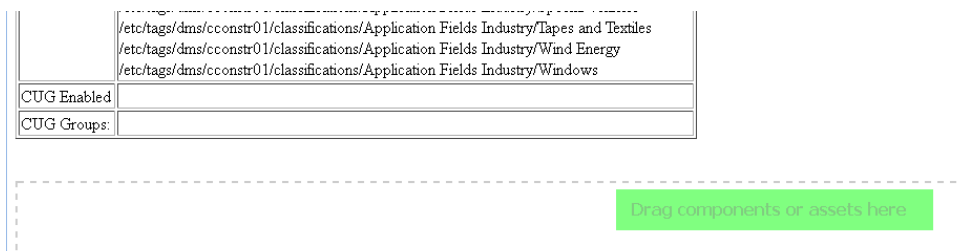
Select and open your country library



Picture: Select Country Library

5.1.1 Create a new matching

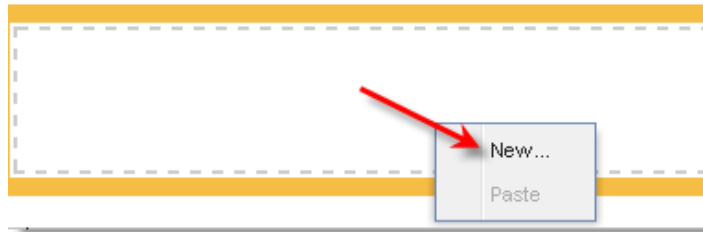
Scroll down to the end of this page



Picture: Create a new matching

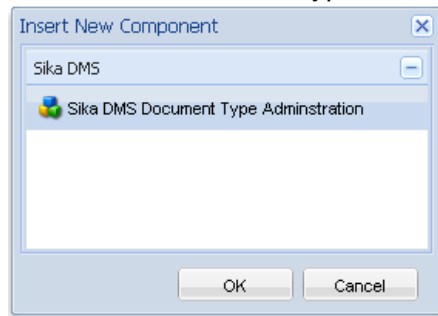


Click on "New"



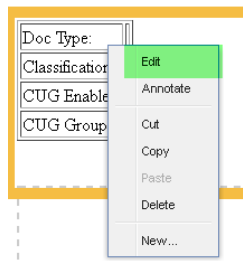
Picture: Create a new document type

Select "Sika DMS Document Type Administration" and click on OK



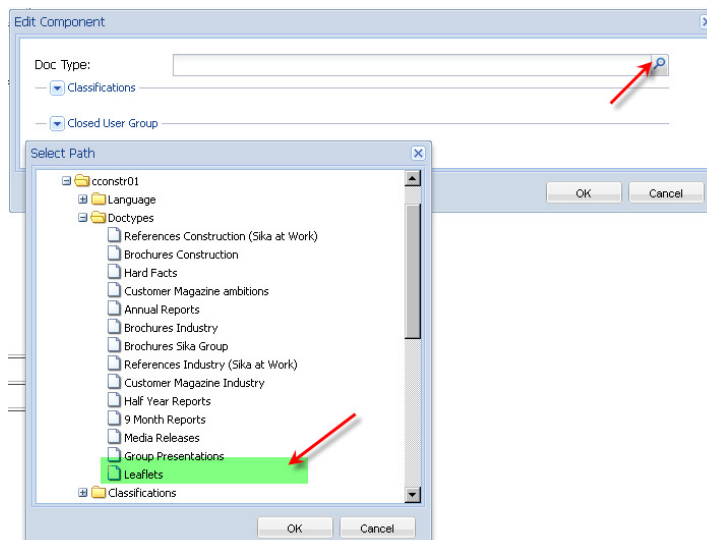
Picture: Insert new component

Click now on "Edit"



Picture: Edit new Doc Type

Click on the magnifying glasses icon, select e.g. "Leaflets" and then click on "OK"



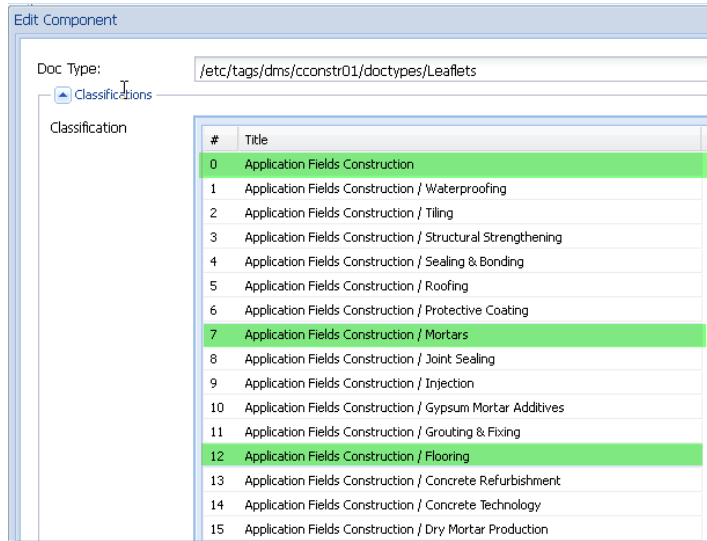
Picture: Select DocType



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Select then e.g. the Application Fields. **“Use Ctrl” key** for this selection.



Picture: Matching Application Fields

After clicking OK, the system creates the new matching.

Doc Type:	/etc/tags/dms/cconstr01/doctypes/Leaflets
Classifications:	/etc/tags/dms/cconstr01/classifications/application_field /etc/tags/dms/cconstr01/classifications/application_field/flooring /etc/tags/dms/cconstr01/classifications/application_field/mortars
CUG Enabled	
CUG Groups:	

Picture: Created first matching

Note:

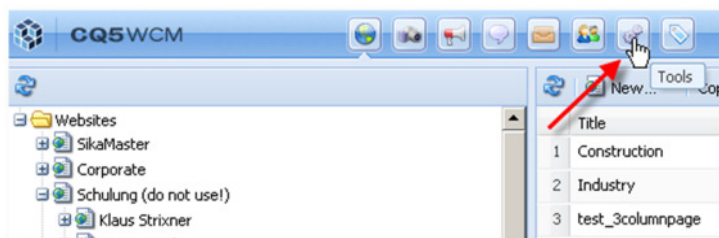
it is possible that you can select more then one search criterias if you create a new matching,

Note:

CUG Enabled/CUG Groups is only for documents in defined CUG's.

5.1.2 Adjustments or additions in an existing matching

Click on the Tools icon in the tool bar to enter the Tools area.



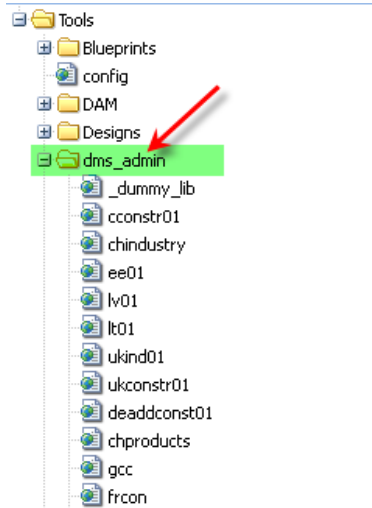
Picture: Click the Tools icon to do the matching between document types and classifications



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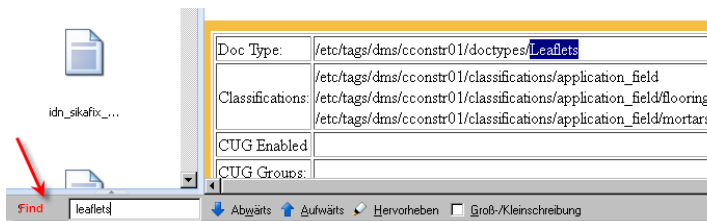
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Select and open your country library



Picture: Select Country Library

Find the corresponding doctype section. Use “Ctrl” + “F” keys to search for the Doctype.

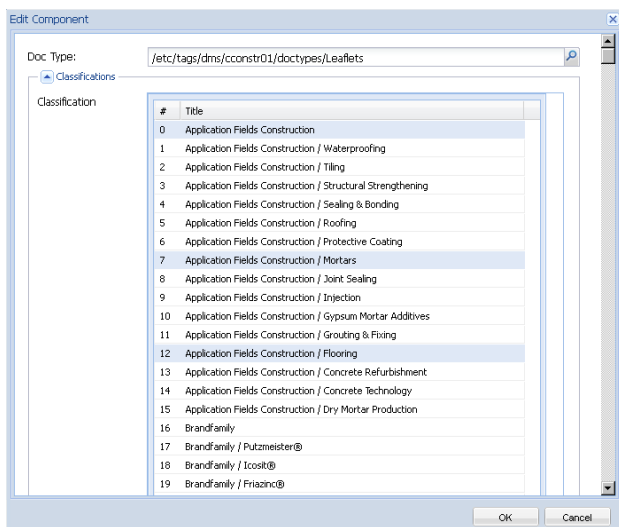


Picture: Find the existing Doc Typ

Open the component. Scroll through the list and find the new classification which you want to add.

Note:

Notice the existing classifications are highlighted in blue. To add the new classification, you need to press and hold the “Ctrl” key and click on the classification.



Picture: Add new classification



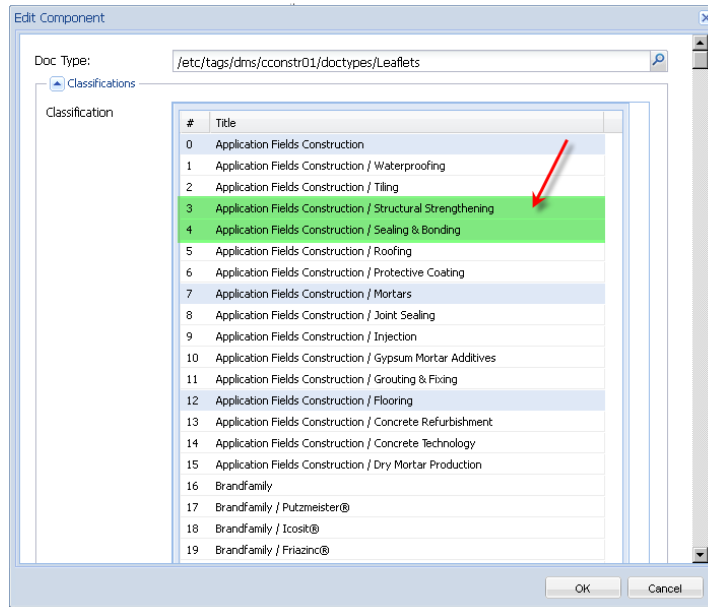
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The green marked Applications Fields are now selected as new search criterias. After the new classification is highlighted in blue you can press the okay button.

Note:

Before you press the OK button, make sure the existing classifications are still highlighted. Otherwise you will loose the existing classifications when clicking the OK button.



Picture: New selected Doc Typ

Check if the new classification is matched to the doctype.

Doc Type:	/etc/tags/dms/cconstr01/doctypes/Leaflets
Classifications:	/etc/tags/dms/cconstr01/classifications/application_field /etc/tags/dms/cconstr01/classifications/application_field/mortars /etc/tags/dms/cconstr01/classifications/application_field/flooring /etc/tags/dms/cconstr01/classifications/application_field/structural_strengthening /etc/tags/dms/cconstr01/classifications/application_field/sealing_bonding
CTUG Enabled	
CTUG Groups:	

Picture: Check new selection



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