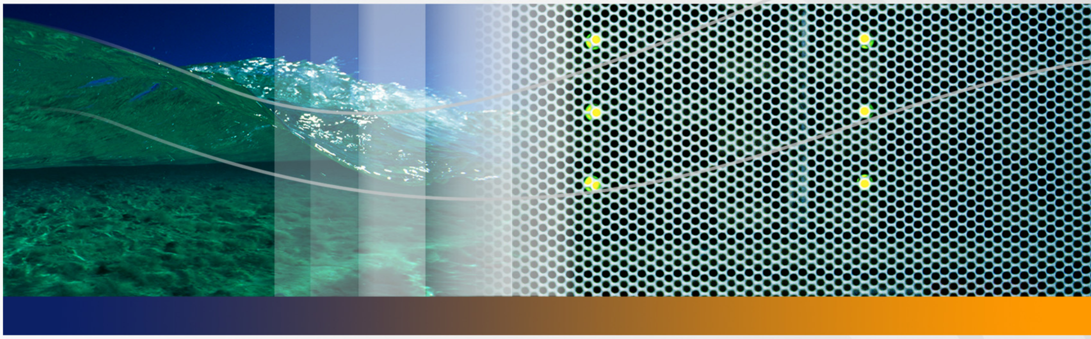
Product Documentation

Peregrine Systems, Inc.

Get-Answers 4.2



User's Guide

Part No. DGA-42-EN13

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Introducing Get-Answers

PEREGRINE

Get-Answers is a Knowledge Management, Web-based application used to manage and make available to authorized users the knowledge base of a company. Using Get-Answers can increase the quality and accuracy of information used by people in the company to get their jobs done.

This preface includes the following topics:

- Organization of this guide on page 7.
- Special elements on page 8.
- Related Documentation on page 9.
- Contacting customer support on page 9.

Organization of this guide

This guide includes the following chapters:

Chapter 1, Finding Information in Get-Answers on page 13.

Chapter 2, Working with Documents on page 71.

Chapter 3, Creating Documents in Get-Answers on page 29.

Appendix A, Search Queries on page 93.

Typographical conventions

This guide uses typeface conventions to indicate special terms and actions. These conventions and their meanings are:

Convention	Meaning
`monospace`	Information that you must type exactly as shown, code examples, output, and system messages appear in a `monospace` font.
Bold	Button names, field names, menu names, and menu options appear in **bold**.
Italics	Variables and values that you must provide appear in *italics*. New terms also appear in *italics*.

Special elements

This book uses special elements to help you locate information. These special elements and their uses are shown in the following table:

Element	Usage
Important:	Information that is required to complete a task
Note:	Information that is of general interest
Tip:	Information that can make a task easier or faster
Warning:	Information that is needed when there is a risk of losing data

Related Documentation

In addition to this guide, Get-Answers User Guide, the following documentation is available for the Get-Answers product:

Document	Description
Get-Answers Installation Guide	This manual describes installing Get-Answers and the Peregrine® Open Application Architecture (OAA) platform, the Get-Answers Search Engine, setting up your Web server and application servers, creating the Get-Answers database, and populating that database with sample data. This is a hard copy document. It is also on the CD or the Customer Support Web site as a downloadable pdf file.
Get-Answers Administration Guide	This manual describes setting up and managing Get-Answers, customizing Get-Answers, and administering Get-Answers users. This document is on the CD or the Customer Support Web site as a downloadable pdf file.
Notification Services Quick Start Guide	This manual explains concepts, provides step-by-step instructions, and describes tasks that you can complete in Notification Services. It also provides information on configuring and administering Notification Services. Notification services works with Get-Answers to enable users to send and receive notifications. This document is on the CD or the Customer Support Web site as a downloadable pdf file.
Get Answer Release Notes	This document contains information about new features, corrected issues, and known issues. This is a hard copy document. It is also on the Customer Support Web site as a downloadable pdf file.

Contacting customer support

For further information and assistance with this release, you can download documentation or schedule training.

Customer Support

For further information and assistance, contact Peregrine Systems' Customer Support at the Peregrine CenterPoint Web site.

To contact customer support:

1. In a browser, navigate to *http://support.peregrine.com*
2. Log in with your user name and password.
3. Follow the directions on the site to find your answer. The first place to search is the KnowledgeBase, which contains informational articles about all categories of Peregrine products.
4. If the KnowledgeBase does not contain an article that addresses your concerns, you can search for information by product; search discussion forums; and search for product downloads.

Documentation Web site

For a complete listing of current Get-Answers documentation, see the Documentation pages on the Peregrine Customer Support Web.

To view the document listing:

1. In a browser, navigate to *http://support.peregrine.com*.
2. Log in with your login user name and password.
3. Click either Documentation or Release Notes at the top of the page.
4. Click the Get-Answers link.
5. Click a product version link to display a list of documents that are available for that version of Get-Answers.
6. Documents may be available in multiple languages. Click the Download button to download the PDF file in the language you prefer.

You can view PDF files using Acrobat Reader, which is available on the Customer Support Web site and through Adobe at *http://www.adobe.com*.

Important: Release Notes for this product are continually updated after each release of the product. Ensure that you have the most current version of the Release Notes.

Education Services Web site

Peregrine Systems offers classroom training anywhere in the world, as well as "at-your-desk" training using the Internet. For a complete listing of Peregrine's training courses, refer to the following web site:

http://www.peregrine.com/education

You can also call Peregrine Education Services at +1 858.794.5009.

1

CHAPTER

Finding Information in Get-Answers

Using the Search option, you can perform basic and advanced searches on a set of documents in Get-Answers. A basic search consists of entering a natural language query (a question) that displays a “hit list” of documents related to the query. An advanced search provides a number of options to narrow your search. In addition, under special circumstances, if you cannot find the information you need, you can open a service ticket requesting the information.

Note: This feature is available only if you have installed ServiceCenter with Get-Answers.

Topics in this chapter include:

- Registering to use Get-Answers on page 14
- Changing Your Password on page 15
- Performing a basic search to find information on page 16
- Hit list for search results on page 17
- Advanced search options on page 19
- Performing an advanced search on page 22
- Browsing categories on page 24
- Submitting comments on a document on page 27
- Opening tickets in Get-Answers on page 28

Note: The Glossary provides explanation of search terms, and the Appendix provides more details on basic and advanced search techniques.

Registering to use Get-Answers

If your administrator has enabled the User Registration function in Get-Answers, you can register yourself if you are not already registered. When you register, a new user account with basic user login rights is created in the back-end system.

To register from the Login screen:

1 Click **Register**.

2 On the page that opens, type the following

   a User's first name - required

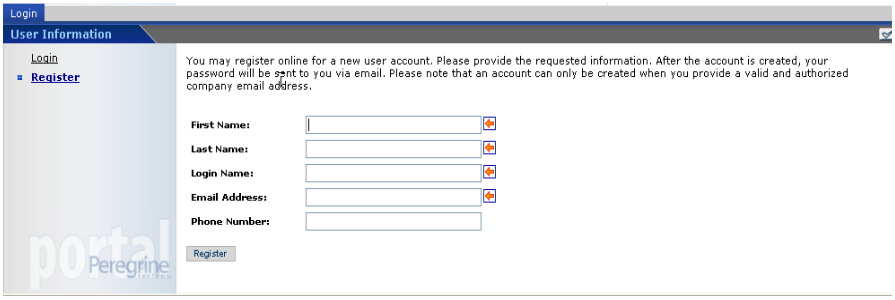
   b User's last name - required

   c User's log in name - required

   d User's E-mail address - required

   e User's phone number

Note: The first four fields are required, as indicated by the arrows to the right of each field.


Login
User Information
Login
Register
First Name:
Last Name:
Login Name:
Email Address:
Phone Number:
Register
portal
Peregrine

You may register online for a new user account. Please provide the requested information. After the account is created, your password will be sent to you via email. Please note that an account can only be created when you provide a valid and authorized company email address.

3. Click **Register**.

   A message appears indicating that you have been registered as a new user. A message containing your password is e-mailed to you.

4. Click **Login** in the Activity menu to access the login screen.

Changing Your Password

You can change your password from the Home tab on Activity menu.

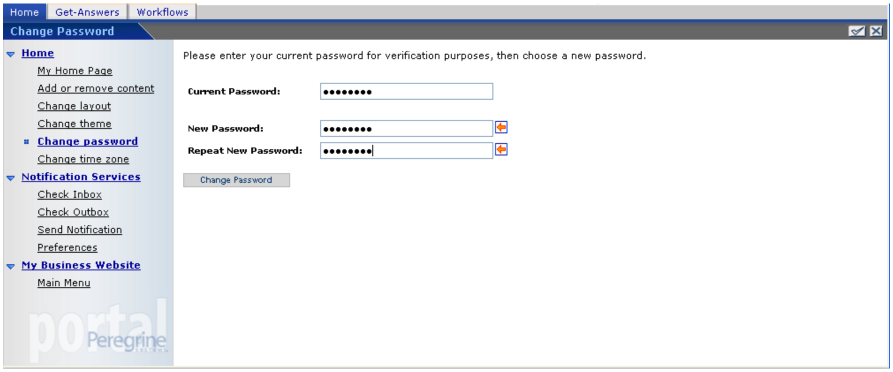
Note: The Change password option appears in the Activity menu only when the system administrator enables users to change their password.

To change your password:

1. Log in to Get-Answers.

2. On the Activity menu, click **Change password** under My Home Page.

   The Change Password window opens.


Home
Get-Answers
Workflows
Change Password
Home
My Home Page
Add or remove content
Change layout
Change theme
Change password
Change time zone
Notification Services
Check Inbox
Check Outbox
Send Notification
Preferences
My Business Website
Main Menu
portal
Peregrine
Change Password

Please enter your current password for verification purposes, then choose a new password.

Current Password: ••••••••

New Password: ••••••••

Repeat New Password: ••••••••

3. Type your current password, the new password you want to use, and the new password for verification.

4. Click **Change Password**.

   A message appears to confirm that your password has been changed.

Performing a basic search to find information

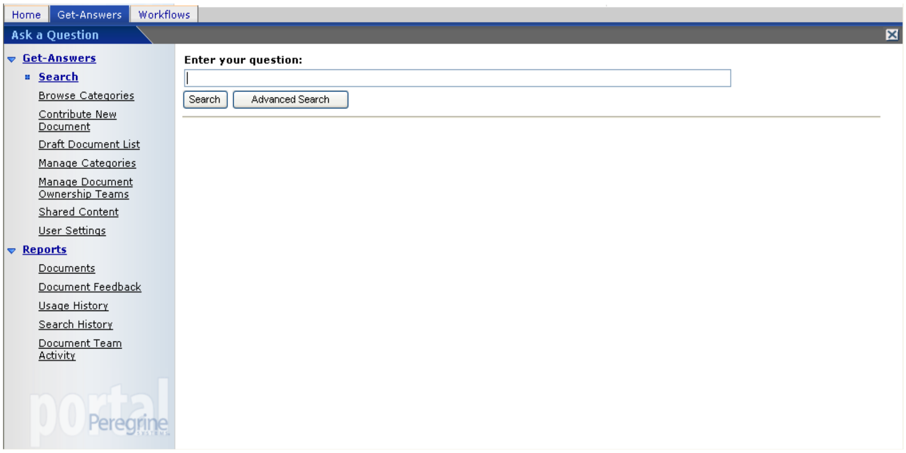
A basic search can provide a wide range of results which may be useful if you are unsure of the exact information you are searching for. When you perform a basic search for a phrase, the database is searched such that any documents containing any of the words in the phrase (an OR search) are returned. To search for documents containing only all the words together in your query, use a Boolean query in an advanced search. See Advanced search options on page 19 for more details about the search options available.

To perform a basic search:

1 From the Peregrine Portal, click the **Get-Answers** tab.

The Ask a Question page opens.

2 In the Ask a Question page, enter your text in the field provided and click **Search** to begin the search.


Home
Get-Answers
Workflows
Ask a Question
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Manage Categories
Manage Document Ownership Teams
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Enter your question:
Search
Advanced Search

A list of documents matching your search request appears.

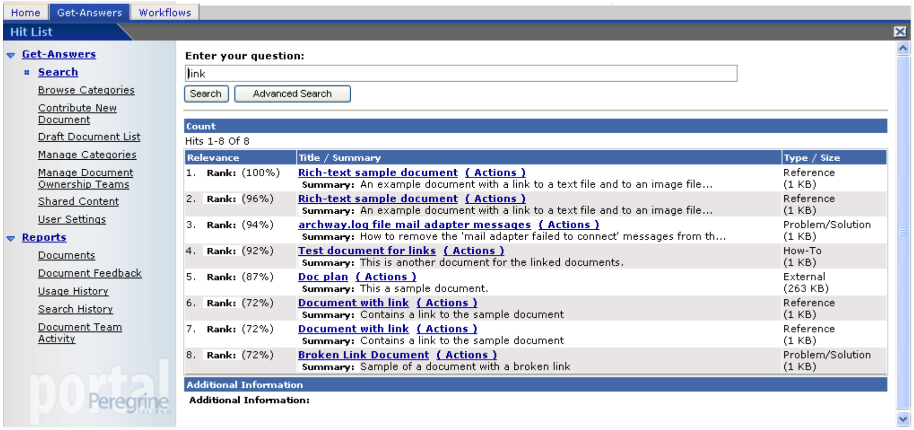
3 Select the desired document or click the **Actions** link for any document to obtain information on that document, such as the title, summary, file size, type, and other detailed information.

Note: Document ownership team members (by default) can search and find unpublished documents including working copies of published documents.

Hit list for search results

When you use the search feature and Get-Answers returns search results, you will find that the word or phrase you searched for is marked in the documents that match your search request. The text in the document appears in a different color than the rest of the document text. The default color is red. Hit highligting does not appear on an external document.

The following figure shows an example of a Hit List page for a search for the word "link."


Home
Get-Answers
Workflows
Hit List
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Manage Categories
Manage Document Ownership Teams
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Search
Advanced Search

Enter your question: link

Count

Hits 1-8 Of 8

Relevance	Title / Summary	Type / Size
1. **Rank:** (100%)	Rich-text sample document (Actions) **Summary:** An example document with a link to a text file and to an image file...	Reference (1 KB)
2. **Rank:** (96%)	Rich-text sample document (Actions) **Summary:** An example document with a link to a text file and to an image file...	Reference (1 KB)
3. **Rank:** (94%)	archway.log file mail adapter messages (Actions) **Summary:** How to remove the 'mail adapter failed to connect' messages from th...	Problem/Solution (1 KB)
4. **Rank:** (92%)	Test document for links (Actions) **Summary:** This is another document for the linked documents.	How-To (1 KB)
5. **Rank:** (87%)	Doc plan (Actions) **Summary:** This a sample document.	External (263 KB)
6. **Rank:** (72%)	Document with link (Actions) **Summary:** Contains a link to the sample document	Reference (1 KB)
7. **Rank:** (72%)	Document with link (Actions) **Summary:** Contains a link to the sample document	Reference (1 KB)
8. **Rank:** (72%)	Broken Link Document (Actions) **Summary:** Sample of a document with a broken link	Problem/Solution (1 KB)

Additional Information

Additional Information:

To view the hit results in one of the documents:

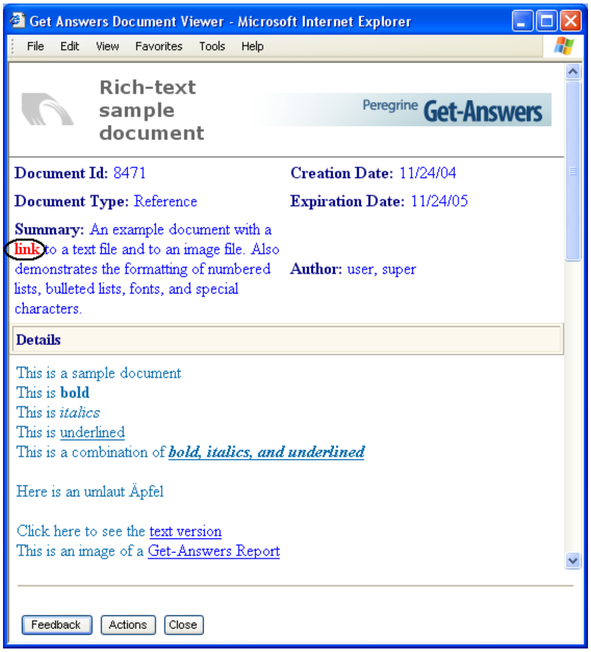
1 On the Get-Answers tab enter the search text in the field provided and click **Search** to begin the search.

The Hit List page displays a list of documents that contain matches to your search request.

Note: You can search only those documents to which you have access. Your access depends upon which document teams you are at least a member of. Your role on the document team and the status of the document determine the documents you can search and the actions you may perform on a particular document. For example, if you have role of owner on a document team, you can search unpublished documents that you own for all the document categories that you have access to as an owner.

2 Click the document title link to view the document.

The document opens in the Document View window. The word “link” appears in red (circled).


Get Answers Document Viewer - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Peregrine Get-Answers
Feedback
Actions
Close

Rich-text sample document

Document Id: 8471

Creation Date: 11/24/04

Document Type: Reference

Expiration Date: 11/24/05

Summary: An example document with a link to a text file and to an image file. Also demonstrates the formatting of numbered lists, bulleted lists, fonts, and special characters.

Author: user, super

Details

This is a sample document
This is **bold**
This is *italics*
This is underlined
This is a combination of ***bold, italics, and underlined***

Here is an umlaut Äpfel

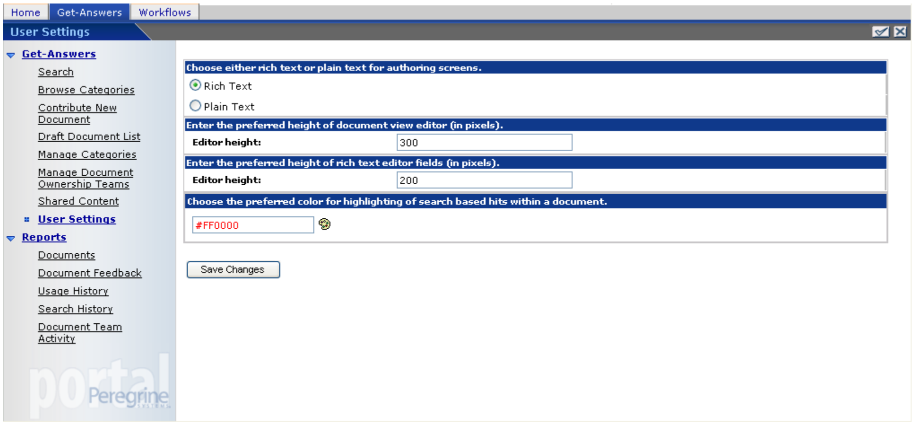
Click here to see the text version
This is an image of a Get-Answers Report

3 Use the hits identified to refine your search as required.

To change the color of the text marked as a hit:

1. On the Get-Answers tab, click the **User Settings** link.

   The User Settings page opens.


Home
Get-Answers
Workflows
User Settings
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Manage Categories
Manage Document Ownership Teams
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Save Changes

Choose either rich text or plain text for authoring screens.

● Rich Text

○ Plain Text

Enter the preferred height of document view editor (in pixels).

Editor height: 300

Enter the preferred height of rich text editor fields (in pixels).

Editor height: 200

Choose the preferred color for highlighting of search based hits within a document.

#FF0000

2. Click the color palette icon in the Choose the preferred color for highlighting of search based hits within a document section.

   The Color Picker window opens.

3. Select a color in the Color Picker window.

   The color code for the color you selected appears in the Choose the preferred color for highlighting of search based hits within a document text box.

4. Click **Save Changes**.

   A confirmation message appears.

Advanced search options

Get-Answers provides several options when performing an advanced search to obtain the information you are looking for. For example, you can change the type of search you want to use, you can search on a document's metadata (such as category and creation date), and you can narrow a document search by selecting nodes in the Table of Contents. This section describes these search types. For step-by-step instructions for performing an advanced search, see Performing an advanced search on page 22.

Performing a Boolean query

You can use Boolean operators to improve the power of a search. Include the terms where appropriate when you enter your text in the fields on the Advanced Search page. When using Boolean operators, only exact words and their tense or singular/plural variants are used in the query.

The terms you can choose from include:

- AND (or the symbol '&') — e.g., "jury AND duty" returns documents with both words, not documents with only one word.
- OR (or the symbol '|') — e.g., "jury OR duty" returns documents containing either or both words.
- NOT (or the symbol '^') — e.g., "jury AND duty NOT form" returns documents containing both the words "jury" and "duty" that do not contain the word "form."
- WITHIN N — e.g., "jury AND duty WITHIN 2" returns documents containing both words, where the words are within two words of each other in a document, not counting stop words, and in either order.
- ADJ N — e.g., "jury AND duty ADJ 2" returns documents containing both words, where the words are within two words of each other in the document, not counting stop words, where "jury" precedes "duty."

Note: The Relevance column in a boolean search always shows "0."

Performing a metadata query

You can choose from two methods to perform queries on document metadata. One method is to search for documents by specifying values for document metadata. Only documents with metadata matching the selection criterion are listed in the resulting hit list.

The following metadata fields are provided by Get-Answers:

- Title
- Summary
- Type
- Creation Date
- Editorial Status
- Category
- Expiration Date

The second method is to specify Boolean operators between metadata types. For example, the Owner of an Ownership Team might want to know what documents (owned by the team) from one particular category associated with the Ownership Team need attention over the next few days. The Owner can issue a query to view all published documents from one specific category associated with the Ownership Team that are set to expire within the next ten days.

Using pattern matching and spelling variants in a search

Use pattern matching to overcome misspellings (human error), problems introduced through the creation of documents using optical character recognition software (scanning), and searches for terms with difficult spellings (proper names, etc.).

You can use pattern matching in two different ways. First, you can indicate specific words to use pattern matching against in any query (in the Basic or Advanced Search screens). To do this, you need to precede the specific words with a "tilde" (~) character in the Query field. Second, you can choose to have all words in a query subjected to pattern matching by selecting Search for Spelling Variants on the Advanced Search page.

Performing a compound query

A compound query combines a natural language query with advanced search options such as queries on metadata and context-based queries.

For information on queries on metadata, see Performing a metadata query on page 20. For information on context-based queries, see Submitting comments on a document on page 27.

Using exact phrase matching

You can specify an exact phrase to search for by surrounding the phrase in quotation marks in the text box. For example, the query "white elephant" would return a list of documents containing that exact phrase. The hit list would not include documents containing the *concepts* "white" (and "pale", "Caucasian", etc.) and "elephant" (and "pachyderm", "Dumbo", etc.).

Using grouped terms

Use grouped terms to semantically group linked terms in the query together. Get-Answers returns documents related to any of the terms in the group, as well as the rest of the terms in the query, in the hit list. You can specify grouped terms by surrounding the set of terms with parentheses in the question text box on the Advanced Search screen.

For example, the query "(chemical gas mustard) attack" returns hits on any documents containing any of the concepts in the set "chemical gas mustard" and the concept "attack."

Note: This is useful when the words in a grouped set are not already semantically related in the dictionary (as in the example). If the words are already related, you basically get the same results as an un-grouped natural language query using the same words. To the system, the query "(dog canine hound) attack" is not much different from the query "dog attack.".

Performing an advanced search

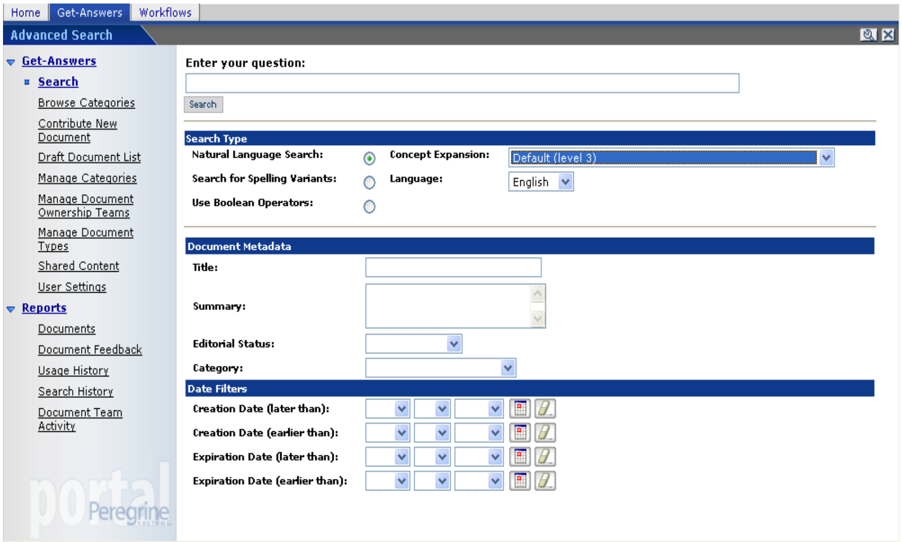
In the Advanced Search option, you can combine the advanced search types described in this section. In the following procedure, use one or more sections to narrow your search.

To perform an advanced search:

1 From the Get-Answers home page, click the **Get-Answers** tab.

2 In the Ask a Question page that opens, click **Advanced Search**.

The Advanced Search form opens.


Home
Get-Answers
Workflows
Advanced Search
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Enter your question:
Search
Search Type
Document Metadata
Title:
Summary:
Editorial Status:
Category:
Date Filters
Creation Date (later than):
Creation Date (earlier than):
Expiration Date (later than):
Expiration Date (earlier than):

Natural Language Search: ●
Search for Spelling Variants: ○
Use Boolean Operators: ○
Concept Expansion: Default (level 3)
Language: English

3 In the Enter your question field, type words for your search.

4 In the Search Type field, make one of these selections:

a Choose **Natural Language Search**, **Search for Spelling Variants**, or **Use Boolean Operators**. The Language drop-down is used for word expansion.

b Choose a concept parameter from the Concept Expansion list. For example, choose **1. Exact matches** to find exact matches to your search words.

c Choose a language from the drop-down language list.

5 In the Document Metadata section, complete one or more of these fields, if applicable:

- In the Title field, enter a document's name.
- In the Summary field, enter the document's description.

- In the Editorial Status list, choose either **Published** or **Working Copy**.
- In the Category drop-down list, select from the list of available document categories to which you have access.

6 In the Date Filters section, you can use the controls provided to set up date filters for your search.

- In the Creation Date (later than) specify a date to limit the search to documents create after the date specified.
- In the Creation Date (earlier than) specify a date to limit the search to documents created before the date specified.
- In the Expiration Date (later than) specify a date to limit the search to documents that expire after the date specified.
- In the Expiration Date (earlier than) specify a date to limit the search to documents that expire before the date specified.

7 Click the **Search** button.

Your results appear in the page that opens.

Browsing categories

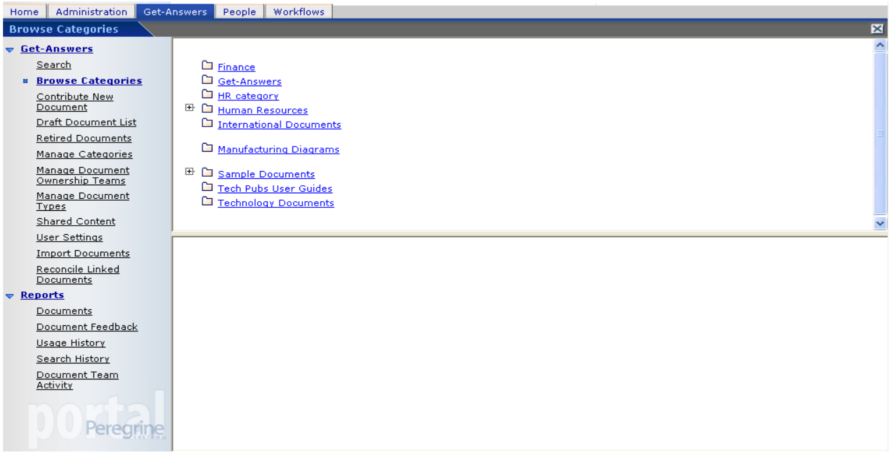
Using a table of contents, you can browse all of the documents to which you have access. Selecting a folder in the table of contents for the document categories causes a list of appropriate documents to appear. When you select one of the documents, it opens in the browser.

To browse categories:

1 From the Get-Answers home page, click the **Get-Answers** tab.

2 Click the **Browse Categories** link.

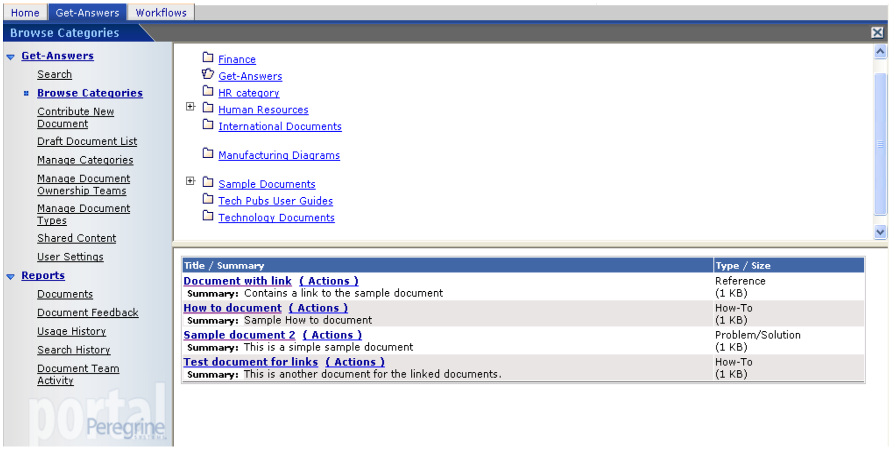
The Browse Categories page opens.


Home
Administration
Get-Answers
People
Workflows
Browse Categories
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal Peregrine
Finance
Get-Answers
HR category
Human Resources
International Documents
Manufacturing Diagrams
Sample Documents
Tech Pubs User Guides
Technology Documents

3 Select the desired main category and then the subcategory within it. A plus sign indicates that a category contains subcategory.

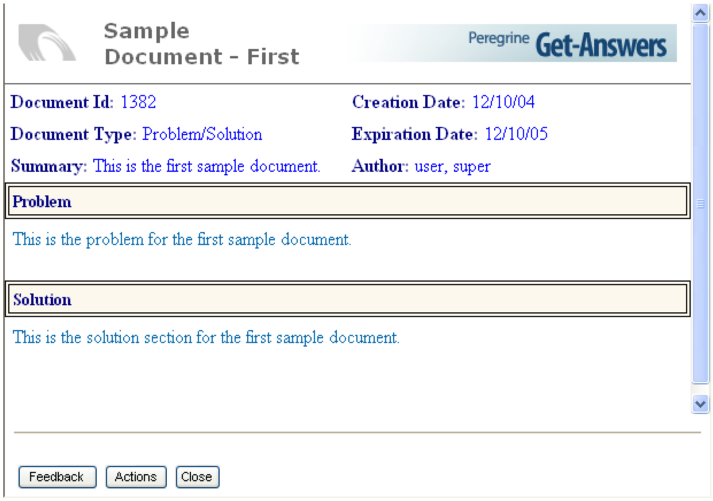
4 Click the category or subcategory open it.

A list of documents opens in the bottom section of the Browse Categories page.


Home
Get-Answers
Workflows
Browse Categories
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal Peregrine
Finance
Get-Answers
HR category
Human Resources
International Documents
Manufacturing Diagrams
Sample Documents
Tech Pubs User Guides
Technology Documents

Title / Summary	Type / Size
Document with link (Actions) **Summary:** Contains a link to the sample document	Reference (1 KB)
How to document (Actions) **Summary:** Sample How to document	How-To (1 KB)
Sample document 2 (Actions) **Summary:** This is a simple sample document	Problem/Solution (1 KB)
Test document for links (Actions) **Summary:** This is another document for the linked documents.	How-To (1 KB)

5 Click the **Title** link to open the document in a Document Viewer window.


Sample Document - First
Peregrine Get-Answers
Feedback
Actions
Close

Document Id: 1382

Document Type: Problem/Solution

Summary: This is the first sample document.

Creation Date: 12/10/04

Expiration Date: 12/10/05

Author: user, super

Problem

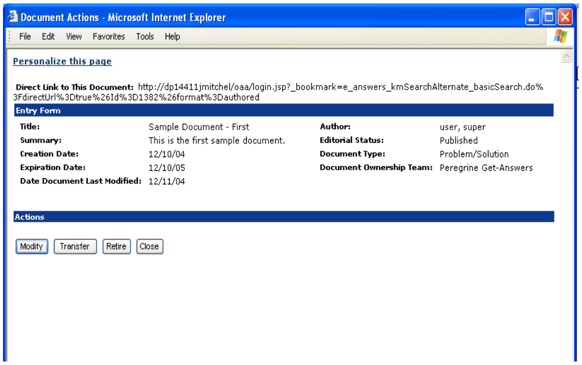
This is the problem for the first sample document.

Solution

This is the solution section for the first sample document.

6 Click the **Actions** button to open the document in the Manage Document Screen window.

The Document Actions window opens.


Document Actions - Microsoft Internet Explorer
File
Edit
View
Favorites
Tools
Help
Personalize this page
Entry Form
Actions
Modify
Transfer
Retire
Close

Direct Link to This Document: http://dp14411jmitchel/oaa/login.jsp?_bookmark=e_answers_kmSearchAlternate_basicSearch.do%3FdirectUrl%3Dtrue%26Id%3D1382%26format%3Dauthored

Title:	Sample Document - First	**Author:**	user, super
Summary:	This is the first sample document.	**Editorial Status:**	Published
Creation Date:	12/10/04	**Document Type:**	Problem/Solution
Expiration Date:	12/10/05	**Document Ownership Team:**	Peregrine Get-Answers
Date Document Last Modified:	12/11/04		

Note: This window can be personalized, which is usually done by the Get-Answers administrator. If the window has been personalized, it may contain additional information that does not appear in the sample screen above. If the **Personalize this page** link appears in the window, you can use Personalization function to modify the fields that display information in this window.

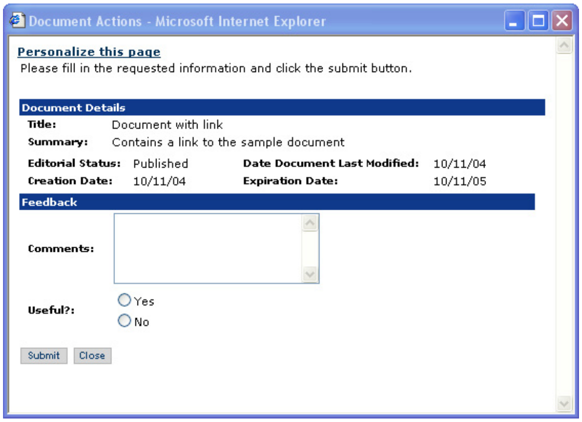
In this window, you can view the document's details such as status, creation date, expiration date, and date last modified. It may also can a list of documents that link to this document. You can also view the feedback for the document and depending on the status of the document and whether or not you own the document, you may be able to transfer this document to another document team.

Submitting comments on a document

You can provide suggestions for improving the documents you use in Get-Answers.

To submit comments on a document:

1. From the Get-Answers home page, click the **Get-Answers** tab.
2. In Get-Answers, click **Search** in the menu options or browse to the document if you know the document's categories and subcategories.
3. Click the **Title** link to open the document in a Document Viewer window.
4. Click the **Feedback** button to open the Document Actions window for feedback.



Please fill in the requested information and click the submit button.

Document Details

Title: Document with link
Summary: Contains a link to the sample document
Editorial Status: Published
Date Document Last Modified: 10/11/04
Creation Date: 10/11/04
Expiration Date: 10/11/05

Feedback

Comments:
Useful?: ○ Yes ○ No

5 In the text box, enter your comments for improving or modifying the document.

6 Answer the question asking if the document was useful to you.

7 Click **Submit** to submit the comments or **Close** to exit without entering any feedback.

Owners can access and review the comments submitted from users.

Opening tickets in Get-Answers

If your Get-Answers system is installed with Peregrine's Get-Services product, you can open a service ticket when you can't find the information you need by using a Get-Answers and Get-Services cross-over feature.

To open a ticket:

1 From the Basic Search, Advanced Search Document Details, or Search Results page, click the **Create New Ticket** button.

2 In the Get-Services page that opens, enter the information in the fields provided, and click **Submit**.

3 Click **Back** to return to the Get-Answers page.

2 CHAPTER

Creating Documents in Get-Answers

You can create documents and edit them from within Get-Answers itself. Using the **Contribute New Document** menu option, you choose a document type that consists of a template specifying the number, labeling, and layout of the entry boxes on the Web-based form used to create the new document. The RTF Editor lets you choose editing features such as:

- Bookmarks
- Fonts
- Headings
- HTML
- Hyperlinks
- Images
- Spell Check
- Tables

Topics in this chapter include:

- Creating a document on page 30.
- Draft documents on page 36.
- Using the edit-on Pro Editor on page 38.

Warning: The Authoring applet causes Netscape 6.2 and 6.2.1 browsers to fail with a General Protection Fault; however Netscape 7 works properly. All other Get-Answers features work properly. If, after starting the application server, you access the system by addressing the Web server as “localhost” (e.g., *http://localhost/oaa/login.jsp*), you will encounter licensing problems when attempting to access the Authoring applet (edit-on Pro). When logging into the application server, use the server name (e.g. *http://<servername>/oaa/login.jsp*).

Creating a document

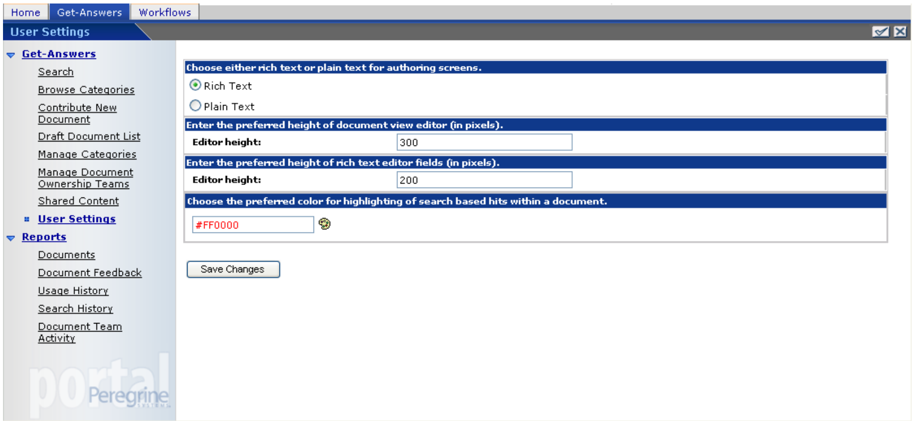
You can create documents within Get-Answers using the Contribute New Document menu option. You can add documents using this feature with the edit-on Pro editor and its associated functions, or you can contribute documents using the plain text editor. The out-of-box setting for authoring screens is rich text, which requires the edit-on Pro editor. For example, if you are working as a technican resolving tickets, you may only need to create brief notes without any special formatting, in which case the plain text editor may be sufficient. If you are creating documents for a wide audience that require some formatting, you should probably use the rich text editor (edit-on Pro).

Updating user settings for authoring screens

To change the user settings for authoring screens:

1 On the Get-Answers tab, click the **User Settings** link.

The User Settings page opens.


Home
Get-Answers
Workflows
User Settings
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Manage Categories
Manage Document Ownership Teams
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Save Changes

Choose either rich text or plain text for authoring screens.

● Rich Text

○ Plain Text

Enter the preferred height of document view editor (in pixels).

Editor height: 300

Enter the preferred height of rich text editor fields (in pixels).

Editor height: 200

Choose the preferred color for highlighting of search based hits within a document.

#FF0000

2. In the Choose either rich text or plain text for authoring screens section, select either Rich Text or Plain Text. If you select Plain Text, you will be able to create new documents in plain text.

3. Click **Save Changes**.

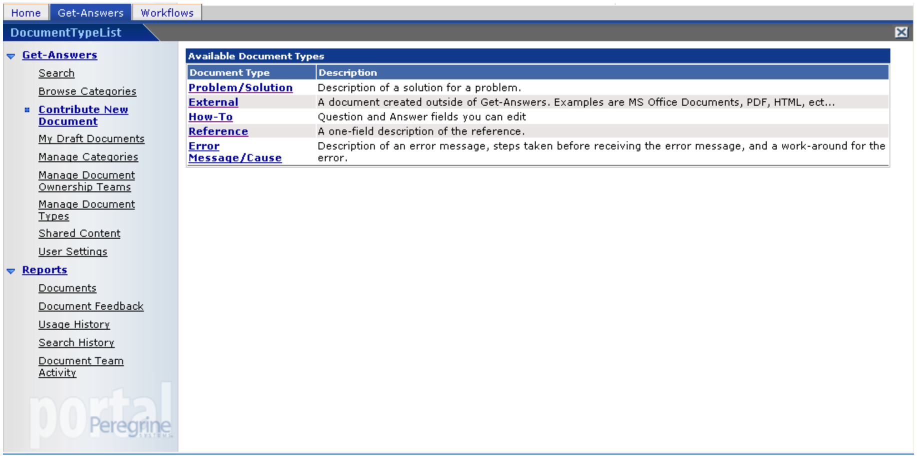
   A confirmation message appears.

Creating a new document with rich text editor

To create a new document using the rich text editor:

1. In Get-Answers, click **Contribute New Document**.

   The Document Type List page opens showing a list of available document types.


Home
Get-Answers
Workflows
DocumentTypeList
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine

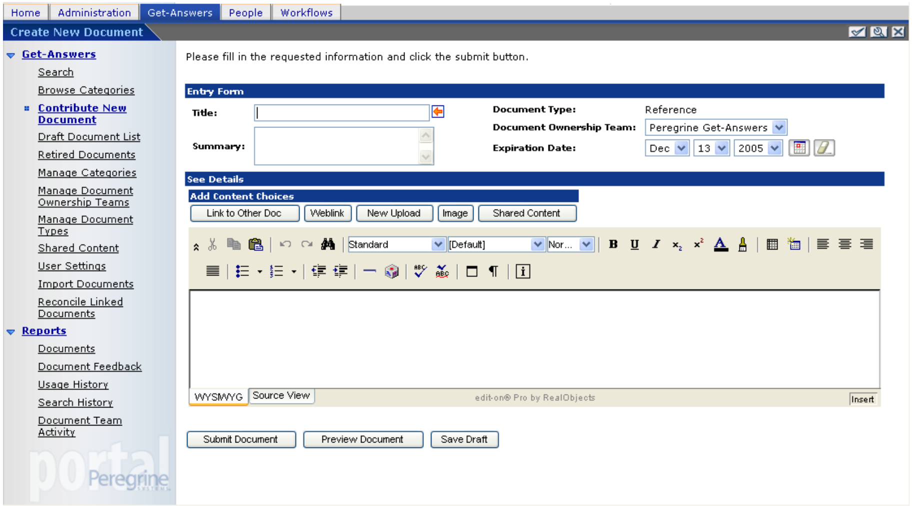
Available Document Types

Document Type	Description
Problem/Solution	Description of a solution for a problem.
External	A document created outside of Get-Answers. Examples are MS Office Documents, PDF, HTML, ect...
How-To	Question and Answer fields you can edit
Reference	A one-field description of the reference.
Error Message/Cause	Description of an error message, steps taken before receiving the error message, and a work-around for the error.

2. Select a document type from the list; for example, Reference.

Note: You cannot use the External document type to create an external document, but you can use the External document type to contribute an external document that you created in an application such as Notepad or Word.

The entry form for the document type you selected opens.



Home
Administration
Get-Answers
People
Workflows
Create New Document
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Entry Form
See Details
Add Content Choices
Link to Other Doc
Weblink
New Upload
Image
Shared Content
Standard
[Default]
Nor...
WYSIWYG
Source View
edit-on® Pro by RealObjects
Insert
Submit Document
Preview Document
Save Draft

Please fill in the requested information and click the submit button.

Title:

Summary:

Document Type: Reference

Document Ownership Team: Peregrine Get-Answers

Expiration Date: Dec 13 2005

3 Type a title for the document you are creating. This is a required entry.

4 Enter the following information to complete the Entry Form portion of the window.

- **Summary** - a brief summary of the document you are creating.
- **Document Ownership Team** - the name of the team that you are assigning ownership to for the document. This is required.
- **Expiration Date** - a date that the document expires and is no longer available in the system. The default is the current date plus one year, which in most cases should be updated.

5 Use the editing tool and associated controls to add the content for document. See Using the edit-on Pro Editor on page 38 for a description of how to use the features of the editing tool.

6 You can also use the buttons in Add Content Choices to add additional content to the new document. The buttons are:

  a **Link to Other Doc** - use this button to select a document to link to, based on document team and category.

  b **Weblink** - use this button to add a link (href) to another Web site.

  c **New Upload** - use this button to add an external attachment. The attachment is usually a Word document, txt file, PDF file or some other type of external document. Because this document is an attachment, it is not included in the index and does not appear in any search results.

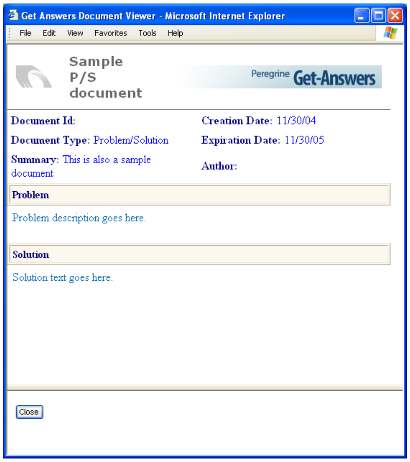
  d **Image** - use this button to add an image to the document view. The image can be either a shared or uploaded image and linked or embedded in the document. A shared image is usually used by more than one document.

Warning: When you add an image to a document, make sure the image name does not contain spaces.

  e **Shared Content** - use this button to add content that has already been uploaded to the database. For example, several documents might share the same PDF file.

7 Click **Preview Document** to open the Get Answers Document Viewer window to display a preview of the document you are creating. Examine the

formatting of the document, and if you need to change it, return to the Document View and make the necessary changes.


Get Answers Document Viewer - Microsoft Internet Explorer
File
Edit
View
Favorites
Tools
Help
Peregrine Get-Answers
Close

Sample P/S document

Document Id:

Creation Date: 11/30/04

Document Type: Problem/Solution

Expiration Date: 11/30/05

Summary: This is also a sample document

Author:

Problem

Problem description goes here.

Solution

Solution text goes here.

8 Click **Close** to close the Preview window and return to the Create New Document page.

9 Click **Save Draft** to save the current version of the document. You can use this feature when you need to save a document that you want to return to later to complete.

10 Click **Submit Document** to add the new document to Workflow.

The document has also been sent to the Triage Workflow for review and potential publication. For information on using Workflow, see *Chapter 3, Using the Worklist*.

Creating a new document with the plain text editor

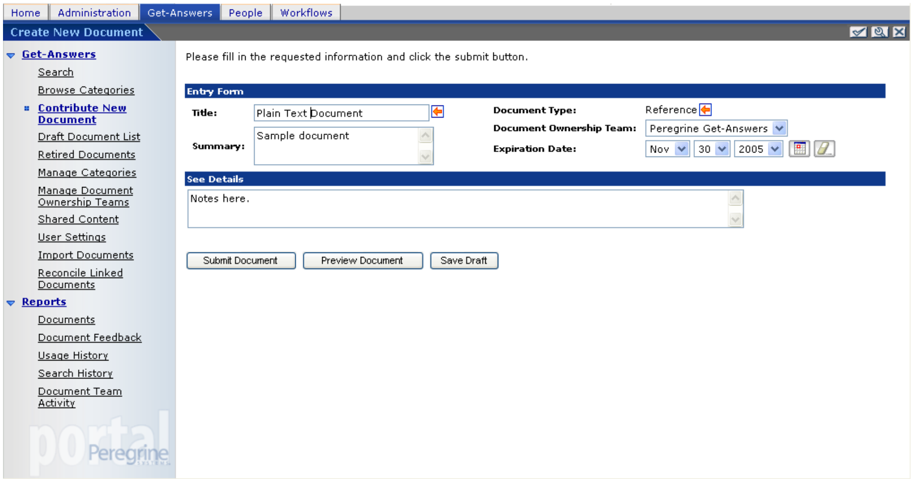
To create a new document using plain text:

1 In Get-Answers, click **Contribute New Document**.

The Document Type List page opens showing a list of available document types.

2 Select a document type from the list; for example, Reference.

The entry form for the document type you selected opens.


Home
Administration
Get-Answers
People
Workflows
Create New Document
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Submit Document
Preview Document
Save Draft

Please fill in the requested information and click the submit button.

Entry Form

Title: Plain Text Document

Summary: Sample document

Document Type: Reference

Document Ownership Team: Peregrine Get-Answers

Expiration Date: Nov 30 2005

See Details

Notes here.

3 Type a title for the document you are creating. This is a required entry.

4 Enter the following information to complete the Entry Form portion of the window.

- **Summary** - a brief summary of the document you are creating.
- **Document Ownership Team** - the name of the team that you are assigning ownership to for the document. This is required.
- **Expiration Date** - a date that the document expires and is no longer available in the system. The default is set by the Get-Answers administrator. Out-of-the-box the expiratior date is the current date plus one year.

5 Use the editor to add the content for document.

6 Click **Preview Document** to open the Get Answers Document Viewer window to display a preview of the document you are creating. Examine the formatting of the document, and if you need to change it, return to the Document View and make the necessary changes.

7 Click **Close** to close the Preview window and return to the Create New Document page.

8 Click **Save Draft** to save the current version of the document. You can use this feature when you need to save a document that you want to return to later to complete.

9 Click **Submit Document** to add the new document to Workflow.

The document has also been sent to the Triage Workflow for review and potential publication. For information on using Workflow, see *Chapter 3, Using the Worklist*.

Draft documents

There is a Save Draft button on the Create New Document page that allows you to save your a draft version of your document. There is a link to your list of draft documents (Draft Document List) on the Get Answers tab.

To save a draft version of your document:

- Click the **Save Draft** button on the Create New Document page.

  A message appears to confirm that you have saved your document. For example:

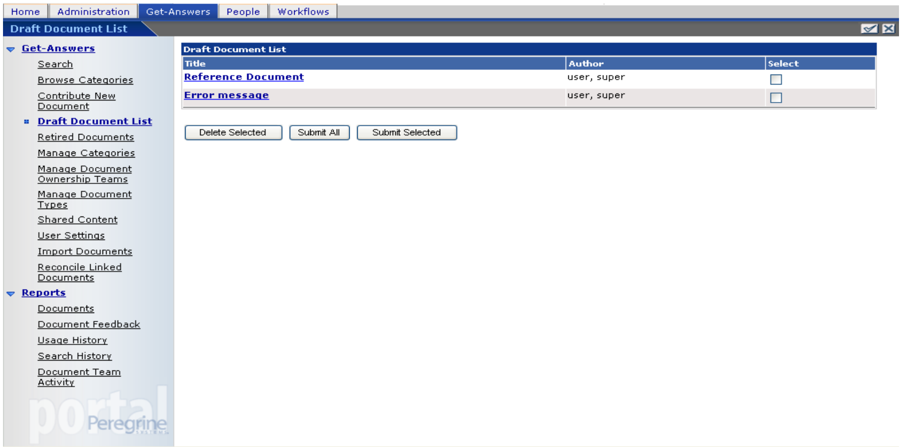
  New document created: Sample Draft Document

  You can now continue working on the document or exit from this task and return to it later.

To return to work on a draft document later:

1. On the Get-Answers tab, click the Draft Document List link on the Activity menu.

   A list of your draft documents appears.


Home
Administration
Get-Answers
People
Workflows
Draft Document List
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Delete Selected
Submit All
Submit Selected

Draft Document List

Title	Author	Select
Reference Document	user, super	☐
Error message	user, super	☐

2. To continue working on a document, click the document title link. For example, click **Sample Draft Document**.

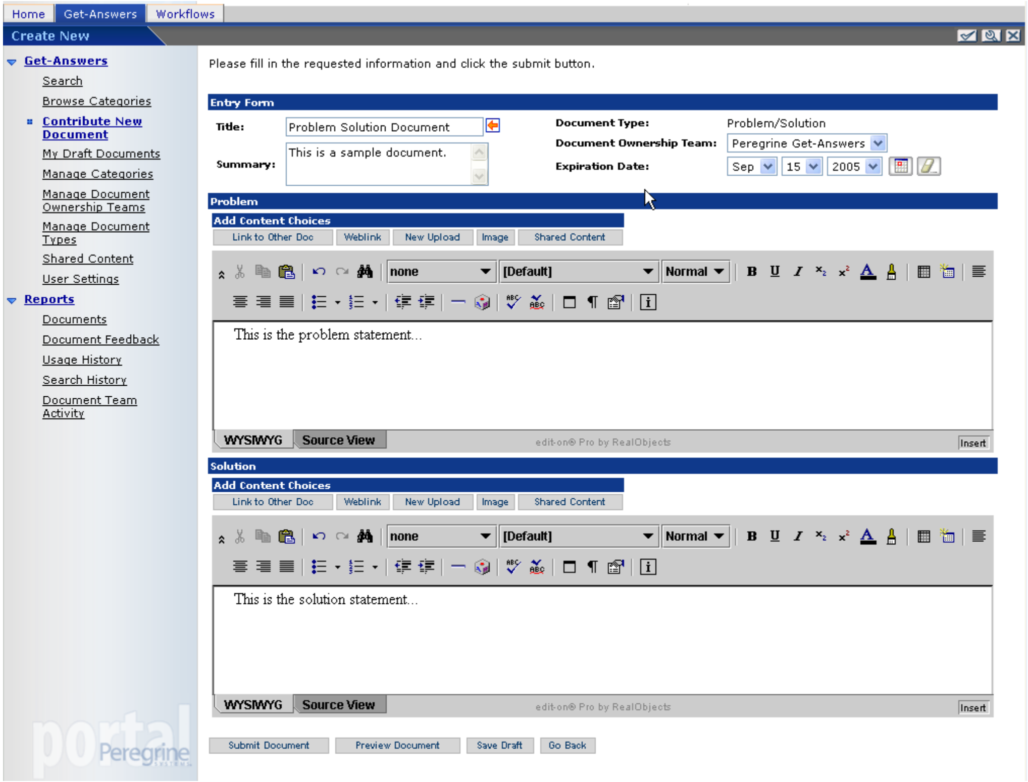
3. To delete any draft documents in the list, use the **Select** check box to select the documents and then click the **Delete Selected** button.

4. To submit one or more documents to workflow, use the **Select** check box to select the documents and then click the **Submit Selected** button.

5. To submit all of the documents in the draft document list, click the **Submit All** button.

Using the edit-on Pro Editor

When you are creating a new document, you use the edit-on Pro Editor to enter the text. This editor provides a way for users to enter content without some knowledge of XHTML.


Home
Get-Answers
Workflows
Create New
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
Entry Form
Problem
Add Content Choices
Link to Other Doc
Weblink
New Upload
Image
Shared Content
none
[Default]
Normal
WYSIWYG
Source View
edit-on® Pro by RealObjects
Insert
Solution
Submit Document
Preview Document
Save Draft
Go Back
portal
Peregrine

Please fill in the requested information and click the submit button.

Title: Problem Solution Document

Summary: This is a sample document.

Document Type: Problem/Solution

Document Ownership Team: Peregrine Get-Answers

Expiration Date: Sep 15 2005

Problem: This is the problem statement...

Solution: This is the solution statement...

edit-on Pro features

The edit-on Pro editor provides two views of the content of the document you are creating or editing in the edit window. The default view is on the WYSIWYG, and this is the view that you should use to create new documents or edit documents. The other view, Source View, displays the XHTML code and is intended for expert users only with a strong knowledge of XHTML.

Note: The 'source' created by the RTF editor is in XHTML format. This format is strict in its guidelines. If you manually edit the source for the rich text fields, ensure that your code conforms to that standard. The XHTML standard can be found at: *http://www.w3.org/tr/xhtml1/*.

Most of the formatting you do with edit-on Pro uses the standard word processing functions. These functions use the typical icons to identify each function on the toolbar at the top of the editing window. For example, if you want to make a word or phrase bold, select the text and then click the bold icon B on the toolbar.

The typical editing functions on the toolbar are as follows.

✂	Cut the selected text.
⧉	Copy the selected text.
📋	Paste the selected text.
↶ ▾ ↷ ▾	Undo or redo a recent action.
🔍	Find and replace a word or phrase.
B I U	Bold, italic, or underline the selected text.
x_2 x^2	Make the selected text a subscript or superscript.
≡ ≡ ≡ ≡	Aligns the selected text: left, center, right, justified.
▦	Inserts a table.
▦	Inserts a table using the table wizard.
⊞	Inserts a row into the table at the current cursor position. You must be in a table for this function to be available.
⊞	Inserts a column into the table at the current cursor position. You must be in a table for this function to be available.
☰	Inserts a number in front of each list item (ordered list).
☰	Inserts a bullet in front of each list item (bulleted list).
⇤ ⇥	Decrease or increase the level of indentation for the paragraph.
¶	When active, displays the control characters such as ¶.

ABC✓	Performs a spelling check on the current field.
≡	Inserts a horizontal line at the position of the cursor.
ℹ	When clicked, a dialog opens with version and copyright information.

Note: There are some practical limits to the size of any table you create using edit-on Pro. Creating tables that have more than ten rows and ten columns may degrade the performance of the editor and larger tables may at some point degrade the stability of the computer while the editor is running.

Using the edit-on Pro hotkeys

The following hot keys are available within the editor:

Ctrl + A	Select All.
Ctrl+I	Italicize selected text.
Ctrl+U	Underline selected text.
Ctrl+B	Bold selected text.
Ctrl + End	Go to the end of the document.
Ctrl + Home	Go to the beginning of the document.
Ctrl + R	Refresh the edit-on Pro editor.
Ctrl + X	Copy selected text into clipboard and delete it from editor (cut).
Ctrl + C	Copy selected text into the editor.
Ctrl + V	Paste clipboard contents into the editor.
Ctrl + Arrow Keys	Go to next/previous word.
Insert	Toggle between insert and overwrite mode.
Shift + Enter	Insert a <**br**> tag (available in WYSIWYG view only).

Modifying published documents

As documents become outdated or if user feedback indicates that a published document needs to be updated, you will need to modify a published document. It is the owner of the document that decides to modify published documents.

As the owner of the document, you should review the feedback and then submit the document to workflow when a documents needs to be revised and re-published.

To modify a published document:

1. Use either browse categories or search to list the document in the Search or Browse Categories hit list.
2. Click the **Actions** link for the document.

   The document opens in the Actions window.
3. Click **Modify.**

   The Submit Feedback windows opens. The text box in this window displays the document ID and title for the document.
4. Add any additional feedback that explains why the document needs to be modified.
5. Click **Submit to Workflow**.

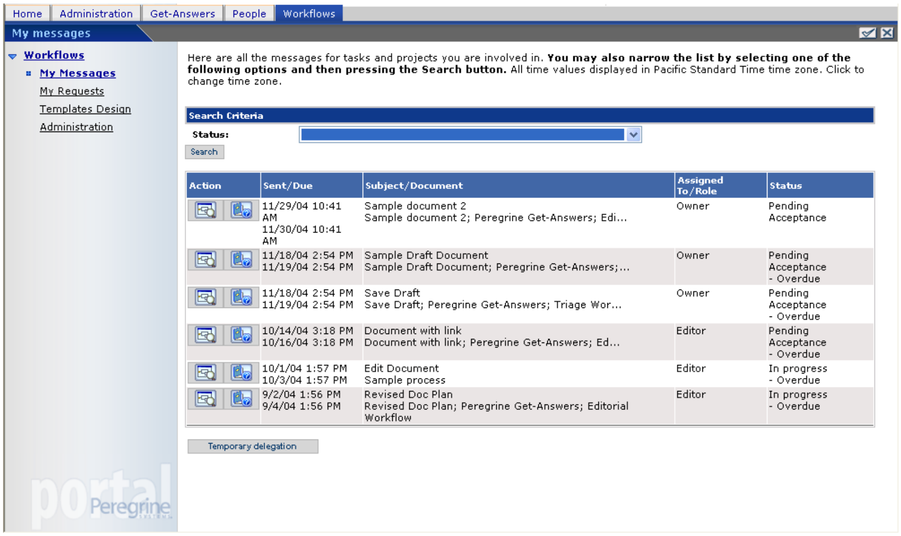
   A confirmation messages verifies that the document has been submitted to the editorial workflow.

This document now appears in the editor's workflow list for the document team that owns this document. The editor can make the changes to the document or re-assign the document to the document owner. The document goes through the standard workflow from editor to reviewer to owner. When the updates to the document are done, the owner can re-publish the document to the appropriate categories. The team responsibilities are:

- Owner team members - edits and publishes as described in the following steps.
- Owner/Editor team members - editor edits and the owner publishes.
- Owner/Review team members - reviewer reviews the revised document and adds comments as appropriate. The document owner publishes.

To re-publish the document:

1 In the Actions column, click the **view work flow item's detail** icon for the item on the Workflows tab.


Home
Administration
Get-Answers
People
Workflows
My messages
Workflows
My Messages
My Requests
Templates Design
Administration
Search Criteria
Search
Temporary delegation
portal
Peregrine

Here are all the messages for tasks and projects you are involved in. **You may also narrow the list by selecting one of the following options and then pressing the Search button.** All time values displayed in Pacific Standard Time time zone. Click to change time zone.

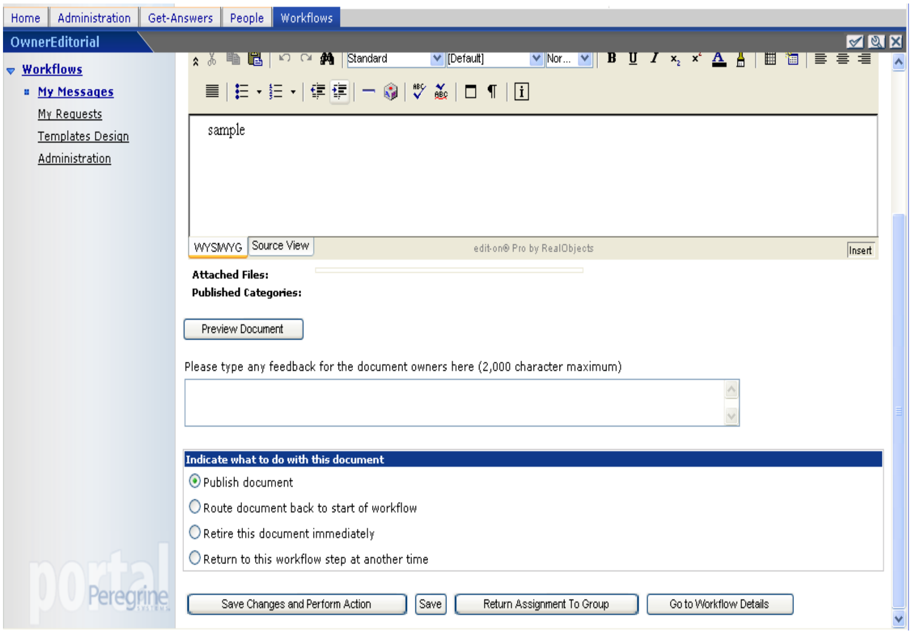
Status:

Action	Sent/Due	Subject/Document	Assigned To/Role	Status
	11/29/04 10:41 AM 11/30/04 10:41 AM	Sample document 2 Sample document 2; Peregrine Get-Answers; Edi...	Owner	Pending Acceptance
	11/18/04 2:54 PM 11/19/04 2:54 PM	Sample Draft Document Sample Draft Document; Peregrine Get-Answers;...	Owner	Pending Acceptance - Overdue
	11/18/04 2:54 PM 11/19/04 2:54 PM	Save Draft Save Draft; Peregrine Get-Answers; Triage Wor...	Owner	Pending Acceptance - Overdue
	10/14/04 3:18 PM 10/16/04 3:18 PM	Document with link Document with link; Peregrine Get-Answers; Ed...	Editor	Pending Acceptance - Overdue
	10/1/04 1:57 PM 10/3/04 1:57 PM	Edit Document Sample process	Editor	In progress - Overdue
	9/2/04 1:56 PM 9/4/04 1:56 PM	Revised Doc Plan Revised Doc Plan; Peregrine Get-Answers; Editorial Workflow	Editor	In progress - Overdue

The Task Details page opens.

2 Click **Accept Group Assignment.**

The OwnerEditorial window opens so you can publish the document or route it back into the workflow for additional changes.


Home
Administration
Get-Answers
People
Workflows
OwnerEditorial
Workflows
My Messages
My Requests
Templates Design
Administration
Standard
[Default]
Nor...
WYSIWYG
Source View
edit-on® Pro by RealObjects
Insert
Preview Document
Save Changes and Perform Action
Save
Return Assignment To Group
Go to Workflow Details
portal
Peregrine

sample

Attached Files:
Published Categories:

Please type any feedback for the document owners here (2,000 character maximum)

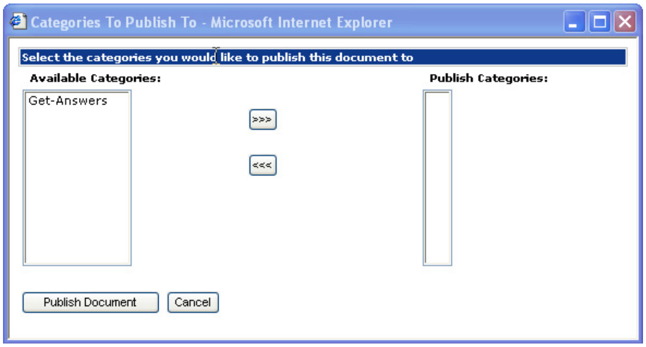
Indicate what to do with this document

- ● Publish document
- ○ Route document back to start of workflow
- ○ Retire this document immediately
- ○ Return to this workflow step at another time

3 If the document is ready to be published, select the **Publish Document** radio button.

4 Click **Save Changes and Perform Action.**

The Categories To Publish To window opens.



Categories To Publish To - Microsoft Internet Explorer
Select the categories you would like to publish this document to
Available Categories:
Publish Categories:
Get-Answers
>>>
<<<
Publish Document
Cancel

5 Select the categories you want the document published to.

6 Click **Publish Document.**

A confirmation message appears.

Submitting an external document for publication

Anyone with submitter permissions can submit a document for publication consideration. A document that is submitted is not immediately published, however. Document ownership teams must review the documents submitted and determine which documents to publish.

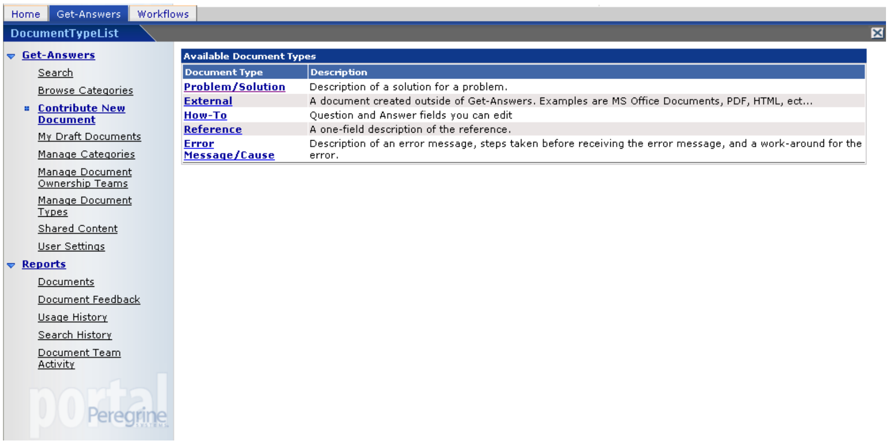
Note: Instead of uploading an existing document from outside of Get-Answers, if you have authoring permissions, you can create a document in Get-Answers. For instructions, see the section Creating a document on page 30.

To submit a document

1 From the Get-Answers home page, click the **Get-Answers** tab.

2 In Get-Answers, click the **Contribute New Document** link.

The Available Document Types list page opens.

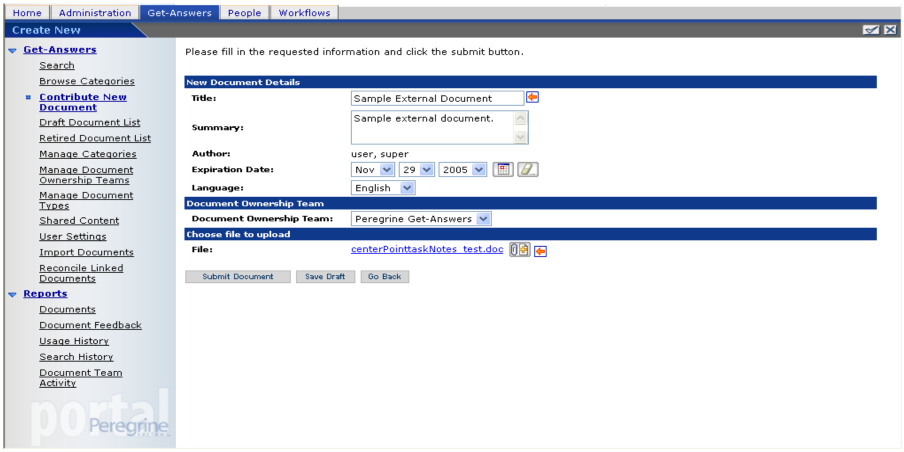

Home
Get-Answers
Workflows
DocumentTypeList
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal Peregrine

Available Document Types

Document Type	Description
Problem/Solution	Description of a solution for a problem.
External	A document created outside of Get-Answers. Examples are MS Office Documents, PDF, HTML, ect...
How-To	Question and Answer fields you can edit
Reference	A one-field description of the reference.
Error Message/Cause	Description of an error message, steps taken before receiving the error message, and a work-around for the error.

3 Click **External** to upload a document created outside of Get-Answers.

The Create New Document page opens.


Home
Administration
Get-Answers
People
Workflows
Create New
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Document List
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal Peregrine
Submit Document
Save Draft
Go Back

Please fill in the requested information and click the submit button.

New Document Details

Title: Sample External Document

Summary: Sample external document.

Author: user, super

Expiration Date: Nov 29 2005

Language: English

Document Ownership Team

Document Ownership Team: Peregrine Get-Answers

Choose file to upload

File: centerPointtaskNotes_test.doc

4 In the Title field, type a name for the new document.

5 In the Summary field, type a description of the document's purpose.

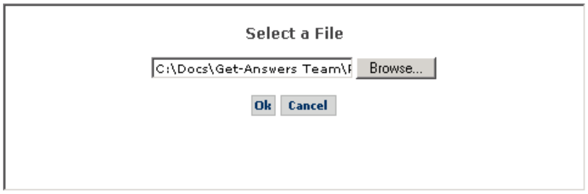
6 In the Expiration Date field, use the controls to enter an expiration date for the document.

7 Use the Language drop-down list to select the document’s language.

8 From the Document Ownership Team list, select the document ownership team for this document.

9 Click the **Plus** icon to select and upload the document file. The file name appears next to the icon.

The Select a File window opens.



C:\Docs\Get-Answers Team\

Note: The maximum file size you can upload is by default of unlimited size, but your system administrator can limit the size via a system parameter.

10 Click **Browse** to browse to the location of the file you are submitting.

11 Click **OK** to load the document.

12 Click **Submit Document**.

The Document Type List page opens and a message appears confirming that a new document was created.

The document is placed in a workflow where it can be made available for publication consideration. For information on documents in Workflows, see the chapter, Using the Worklist on page 47.

3

CHAPTER

Using the Worklist

When a document is submitted to Get-Answers, it becomes part of a workflow. As a member of a document team you will receive work items through a worklist. This chapter provides information on how to use your worklist and complete your work items.

Topics in this chapter include:

- Worklists and roles on page 47.
- Accessing the worklist on page 49.
- Completing worklist items on page 50.
- Reassigning a work item on page 59.
- Viewing history on page 62.
- Viewing status on page 63.
- Delegating your worklist to another user on page 65.

Worklists and roles

All documents submitted to Get-Answers go through a workflow, except External documents. In Workflow users are able to determine how the documents should be processed in the system until they become part of the document database. As a member of one or more document teams, you will participate in the workflow according to your assigned role you have on the team or teams to which you belong. Worklists contain the messages sent by the system to notify you of the tasks assigned to you for documents submitted to

Get-Answers. The Triage and Editorial workflows include the following roles and actions:

- Triage workflow includes submitted, transferred, expired, and unretired documents.

  Owner - First, a document owner examines a document and makes a decision about what to do with the document. Options include:

  - sending the document into an Editorial workflow,
  - publishing the document,
  - transferring the document to another document team, or
  - deleting the document. (Documents are either submitted by users through the Contribute New Document function or transferred from another document team.)

- Editorial workflow

  Editor - Once an Owner marks a document for an Editorial review, an Editor reviews the document and can change the document. Editors can also view and add comments for a document. If the ownership team has no editor, this step is skipped in the workflow.

  Reviewer - A Reviewer can view the document and its metadata, but cannot change the document or the metadata. Reviewers can also view and add comments. If the ownership team has no reviewer, this step is skipped in the workflow.

  Owner - After going through the review process, an Owner can reroute the document back to the Editor, publish the document, transfer the document, delete the document, or revert the document to its original state, if the document was previously published.

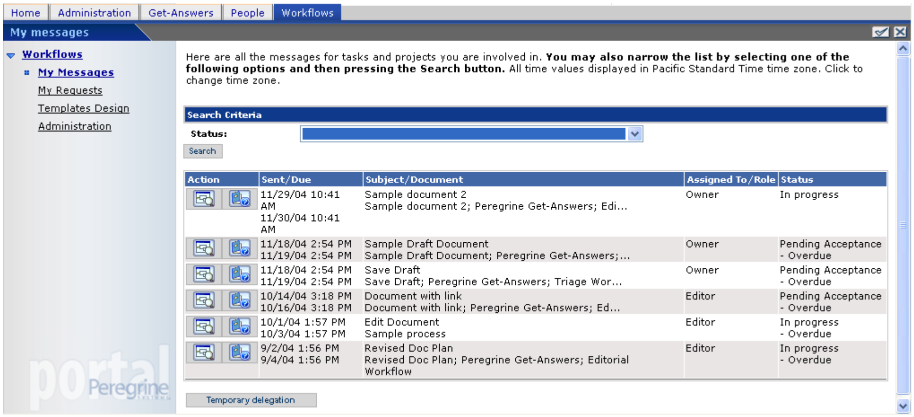
Accessing the worklist

As a workflow user, you receive work items through your worklist. The items you receive depends upon what role you have on a team.

To access your worklist:

1 Log on to Get-Answers.

2 Click the **Workflows** tab to display the My messages page.


Home
Administration
Get-Answers
People
Workflows
My messages
Workflows
My Messages
My Requests
Templates Design
Administration
portal
Peregrine
Search
Temporary delegation

Here are all the messages for tasks and projects you are involved in. **You may also narrow the list by selecting one of the following options and then pressing the Search button.** All time values displayed in Pacific Standard Time time zone. Click to change time zone.

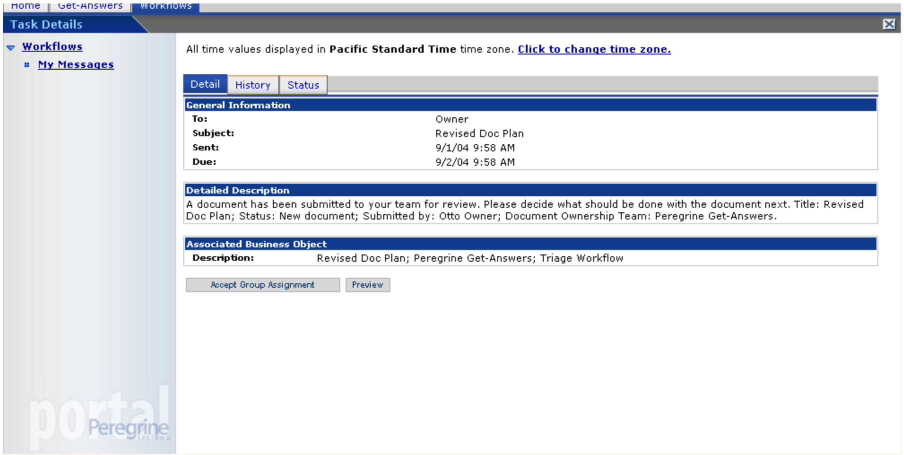
Search Criteria

Status:

Action	Sent/Due	Subject/Document	Assigned To/Role	Status
	11/29/04 10:41 AM 11/30/04 10:41 AM	Sample document 2 Sample document 2; Peregrine Get-Answers; Edi...	Owner	In progress
	11/18/04 2:54 PM 11/19/04 2:54 PM	Sample Draft Document Sample Draft Document; Peregrine Get-Answers;...	Owner	Pending Acceptance - Overdue
	11/18/04 2:54 PM 11/19/04 2:54 PM	Save Draft Save Draft; Peregrine Get-Answers; Triage Wor...	Owner	Pending Acceptance - Overdue
	10/14/04 3:18 PM 10/16/04 3:18 PM	Document with link Document with link; Peregrine Get-Answers; Ed...	Editor	Pending Acceptance - Overdue
	10/1/04 1:57 PM 10/3/04 1:57 PM	Edit Document Sample process	Editor	In progress - Overdue
	9/2/04 1:56 PM 9/4/04 1:56 PM	Revised Doc Plan Revised Doc Plan; Peregrine Get-Answers; Editorial Workflow	Editor	In progress - Overdue

3 Click any of the search icons or task entry for the work item.

The Task Details page opens for new messages in your list, or the Triage or Editorial page opens. The Task Details page is skipped if only one person is assigned a particular role. In this example, if the person logged in was the only owner in the Peregrine Get-Answers team, the Triage page would open.



All time values displayed in **Pacific Standard Time** time zone. Click to change time zone.

General Information

To:	Owner
Subject:	Revised Doc Plan
Sent:	9/1/04 9:58 AM
Due:	9/2/04 9:58 AM

Detailed Description

A document has been submitted to your team for review. Please decide what should be done with the document next. Title: Revised Doc Plan; Status: New document; Submitted by: Otto Owner; Document Ownership Team: Peregrine Get-Answers.

Associated Business Object

Description: Revised Doc Plan; Peregrine Get-Answers; Triage Workflow

The following sections explain the options and actions available for worklist items.

Completing worklist items

In Get-Answers, there are two types of workflows; Triage (for submitted, transferred, expired, and unretired documents) and Editorial work items (or documents). Document Owners use the Triage workflow to examine newly submitted documents that have never been published before. Editors and Reviewers use the Editorial workflow to edit and review unpublished documents and the document's metadata or to review and edit a working copy version of a published document. The Editorial workflow allows Editors and Owners to make changes to documents and Reviewers to request changes to documents.

Note: Unpublished documents can be submitted using the Contribute New Document process, or by being transferred from another document team.

Owner actions

When a document is submitted to Get-Answers, the document goes into the Triage workflow where the document is assigned to the owner based on the Document Type and Document Team for the Document Type. The owner determines how the document should be routed through the Triage workflow.

To begin the Triage workflow:

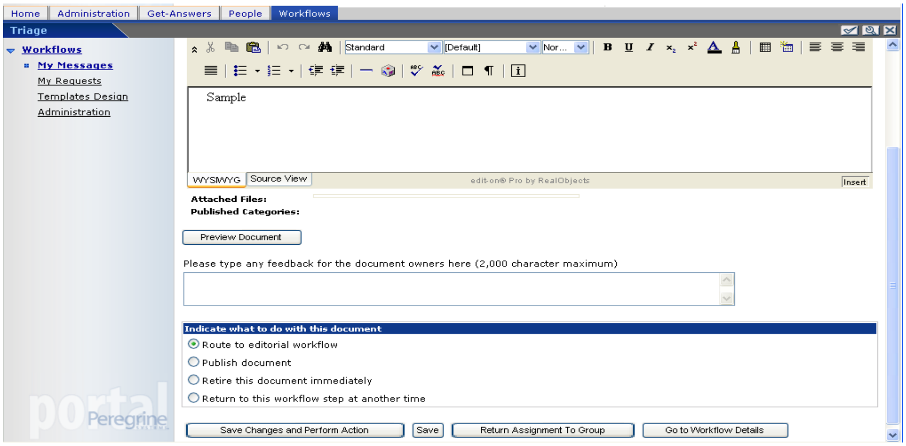
1. View the details of the document by clicking the task entry in the worklist on the My Messages page.

   The Task Details page opens.

   - You can click **Accept Group Assignment for the document**.
   - You can click **Preview**, to open the document in the Preview window

2. Or, click **Temporary delegation** to temporarily delegate you assignments on the worklist to another user. If you want to reassign the task to another user, see Reassigning a work item on page 59.

When you accept an assignment in the Triage workflow, the **Triage Workflow page** opens. Depending on whether you are looking at a external document or a new document that you create, the top portion of the page varies.


Home
Administration
Get-Answers
People
Workflows
Triage
Workflows
My Messages
My Requests
Templates Design
Administration
Standard
[Default]
Nor...
WYSIWYG
Source View
edit-on® Pro by RealObjects
Insert
Preview Document
Save Changes and Perform Action
Save
Return Assignment To Group
Go to Workflow Details
portal
Peregrine

Sample

Attached Files:

Published Categories:

Please type any feedback for the document owners here (2,000 character maximum)

Indicate what to do with this document

● Route to editorial workflow

○ Publish document

○ Retire this document immediately

○ Return to this workflow step at another time

1. As an owner of the document, you can change the document before making a decision on how to process the document. Specifically, you can do one of the following:

   - Route the document to the editorial workflow.
   - Publish the document immediately to the desired category. Ensure that you publish the document to the appropriate category or categories.
   - Transfer the document to a different document team. Ensure that you have selected the appropriate document team in the Transfer to Team drop-down list.
   - Retire the document from Get-Answers.
   - You can use the Entry Form section of the Triage page to edit any of the metadata (information about the document) on the form or to view the document and provide feedback about the document.
   - Return the document to the group for re-assignment.

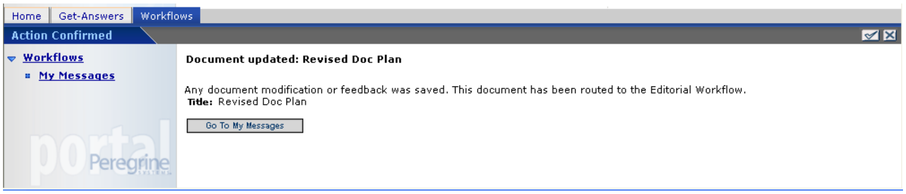
Note: Some of the changes you can make in the document depend on how your administrator has personalized the Entry Form section, which may or may not allow you to change some of the fields in the this section.

2. When you decide on the action for the document, click the appropriate button:

   - **Save Changes and Perform Action**
   - **Save**, which creates draft version of the document.
   - **Go To Workflow Details**
   - **Return Assignment to Group**

   If you select, **Save Changes and Perform Action**, the **Action Confirmed** page opens. When you select the Publish Document radio, the Categories

To Publish To Window opens, which allows you to select the appropriate cagtegories for the document.


Home
Get-Answers
Workflows
Action Confirmed
Workflows
My Messages
Go To My Messages

Document updated: Revised Doc Plan

Any document modification or feedback was saved. This document has been routed to the Editorial Workflow.
Title: Revised Doc Plan

3 Click **Go To My Messages** to continue reviewing documents.

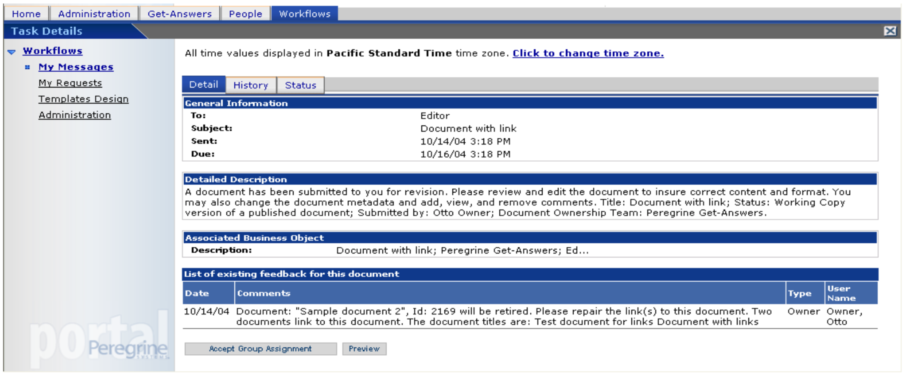
Editorial workflow for the editor

When you have a role as an editor for a document team, documents submitted to the Editorial workflow are routed to you. These messages appear in your message worklist.

To complete an editorial work item:

1 In My messages on the Workflow tab, select an Editorial work item by clicking the search icon or the View details link for the item.

The **Task Details** page opens if there are multiple editors on your document team.


Home
Administration
Get-Answers
People
Workflows
Task Details
Workflows
My Messages
My Requests
Templates Design
Administration
Detail
History
Status
Accept Group Assignment
Preview

All time values displayed in **Pacific Standard Time** time zone. **Click to change time zone.**

General Information

To:	Editor
Subject:	Document with link
Sent:	10/14/04 3:18 PM
Due:	10/16/04 3:18 PM

Detailed Description

A document has been submitted to you for revision. Please review and edit the document to insure correct content and format. You may also change the document metadata and add, view, and remove comments. Title: Document with link; Status: Working Copy version of a published document; Submitted by: Otto Owner; Document Ownership Team: Peregrine Get-Answers.

Associated Business Object

Description: Document with link; Peregrine Get-Answers; Ed...

List of existing feedback for this document

Date	Comments	Type	User Name
10/14/04	Document: "Sample document 2", Id: 2169 will be retired. Please repair the link(s) to this document. Two documents link to this document. The document titles are: Test document for links Document with links	Owner	Owner, Otto

2 Review the General Information frame of the page and determine if there is a date by which you need to complete the task.

The date due is optional and depends on the setting defined for the work item activity.

3 Review the instructions in the Detailed Description frame of the page.

4 Review the feedback.

5 Click **Accept Group Assignment** to take ownership of the document.

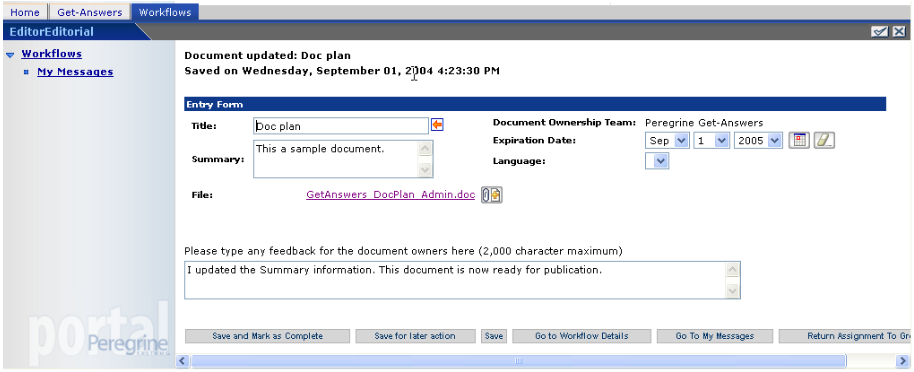
Note: If there are multiple editors in your Document Team, click Accept Group Assignment. If you are the only editor, you will not be presented with the group form in steps 1 to 5.

The **Editorial Workflow Form** opens. Depending on whether you are looking at a external document or a new document (created in the Contribute New Document option), the top portion of the page may vary.

External document

If the document is an External document, you can only edit the metadata.

The example below shows a external document in the Editorial Workflow. A newly authored document will look like the Authoring page with the same options available for you to use.


Home
Get-Answers
Workflows
EditorEditorial
Workflows
My Messages
Entry Form
Save and Mark as Complete
Save for later action
Save
Go to Workflow Details
Go To My Messages
Return Assignment To Gr
portal
Peregrine

Document updated: Doc plan
Saved on Wednesday, September 01, 2004 4:23:30 PM

Title: Doc plan
Summary: This a sample document.
File: GetAnswers_DocPlan_Admin.doc
Document Ownership Team: Peregrine Get-Answers
Expiration Date: Sep 1 2005
Language:

Please type any feedback for the document owners here (2,000 character maximum)
I updated the Summary information. This document is now ready for publication.

As an editor, you can change the document, change the document metadata, and view, add, or delete comments. Then you can send the document on to a reviewer.

To edit an external document:

1. Open the external document by clicking the document link in the Entry Form section.
2. In the File Download dialog box, click **Save** to save the document to your local PC.
3. Open the document with the appropriate application. For example, open a Word document with Word.
4. Make any required changes to the document and save the changes.

5. Click the add new file icon, to re-import the revised document.
6. Click **Save and Mark as Complete** when you finish. If you need to stop and return to the document later, click **Save for later action**.

   The Action Confirmed page opens.

Authored document

To edit an authored document:

1. Open the authored document by clicking the document link in the Entry Form section.
2. In the Editorial page, make any required changes to the document and save the changes.
3. Click **Save and Mark as Complete** when you finish. If you need to stop and return to the document later, click **Save for later action**.

   The confirmed appears at the top of the My messages page.

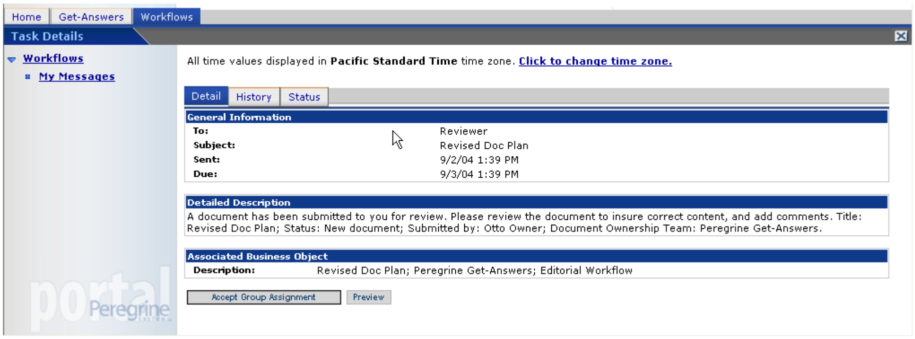
Editorial workflow for a reviewer

When you have a role as a reviewer for a document team, documents submitted to the Editorial workflow for the team are routed to you after the editor has reviewed them.

To review a work item:

1 In your My Messages list, select a Review Document work item by clicking **View details** for the document.

The **Task Details** page opens if there are multiple reviewers on your document team.


Home
Get-Answers
Workflows
Task Details
Workflows
My Messages
Detail
History
Status
Accept Group Assignment
Preview
portal Peregrine

All time values displayed in **Pacific Standard Time** time zone. Click to change time zone.

General Information

To: Reviewer
Subject: Revised Doc Plan
Sent: 9/2/04 1:39 PM
Due: 9/3/04 1:39 PM

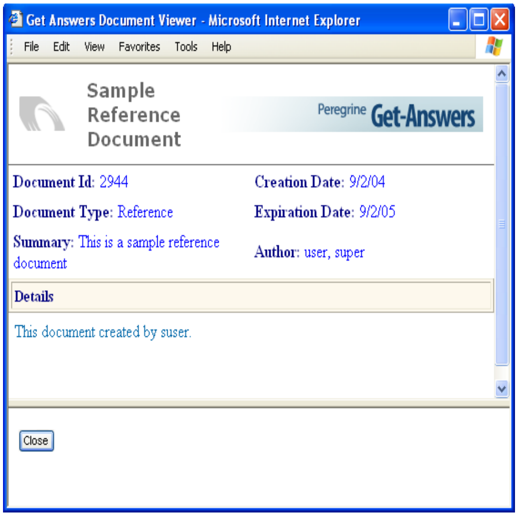
Detailed Description

A document has been submitted to you for review. Please review the document to insure correct content, and add comments. Title: Revised Doc Plan; Status: New document; Submitted by: Otto Owner; Document Ownership Team: Peregrine Get-Answers.

Associated Business Object

Description: Revised Doc Plan; Peregrine Get-Answers; Editorial Workflow

2 Use the **Preview** button to view the document in the Preview window.


Get Answers Document Viewer - Microsoft Internet Explorer
File
Edit
View
Favorites
Tools
Help
Peregrine Get-Answers
Close

Sample Reference Document

Document Id: 2944
Creation Date: 9/2/04
Document Type: Reference
Expiration Date: 9/2/05
Summary: This is a sample reference document
Author: user, super

Details

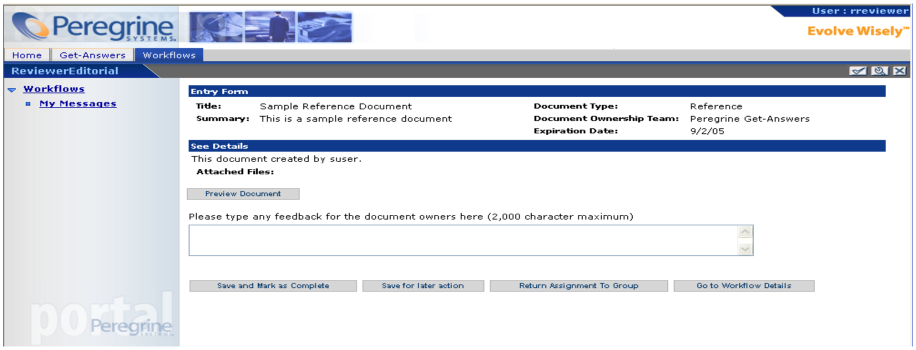
This document created by suser.

Note: Once you accept a document for review, you can no longer preview the document from this view.

3 Click **Close** to close the Preview window.

4 Click **Accept Group Assignment** to take ownership of the document.

The Review page opens.


User : rreviewer
Peregrine Systems
Evolve Wisely™
Home
Get-Answers
Workflows
ReviewerEditorial
Workflows
My Messages
Preview Document
Save and Mark as Complete
Save for later action
Return Assignment To Group
Go to Workflow Details
portal Peregrine

Entry Form

Title: Sample Reference Document
Summary: This is a sample reference document
Document Type: Reference
Document Ownership Team: Peregrine Get-Answers
Expiration Date: 9/2/05

See Details

This document created by suser.
Attached Files:

Please type any feedback for the document owners here (2,000 character maximum)

5 You can:

- Click **Save for later action**. If you have typed any review comments, they are saved **and become part of the reviewer comments for the document.**
- Click **Go to Workflow Details** to open the Task Details page where you can view the document's history and status in the workflow.
- Click **Return Assignment To Group** to return the document to the group for re-assignment to another reviewer.
- Click **Save and Mark as Complete** after you provide your feedback in the text box provided.

You are returned to the **My Messages** page to continue reviewing documents.

Editorial workflow for the owner

After going through the review process, a document returns to the owner to publish, revert to an earlier version, delete, transfer, or send the document back into the Editorial workflow for another review cycle.

To edit a document you own:

1 Select the desired work item by clicking the search icon.

2. If there are multiple owners in your Document Team, you click **Accept Group Assignment**. If you are the only owner, you see the Editorial Workflow page for owners.

   The Owner Editorial page opens. It looks very similar to the Triage Workflow Form, but it also contains the comments and changes submitted by the Editor and the Reviewer.

3. Do one the following as needed:

   - Change the metadata for the document.
   - Change the document.
   - Enter any comments you want to include.
   - Publish the document to the appropriate categories.
   - Return the document to the assignment group.
   - Retire the document .
   - Revert to the published version if it is a working copy of a published document.
   - Route the document back to the start of workflow.
   - Save changes and return to this workflow step later.
   - Don't do anything with the document at this time.

4. Click **Save Changes and Perform Action** when you finish.

   The **Action Confirmed** page opens.

5. If you selected Publish document, the Categories To Publish To window opens and you select the categories you want to publish to.

6. Click **Go To My Messages** to continue reviewing documents.

Reassigning a work item

You can reassign work items to another user, or you can return an assign to the group.

Reassigning a work item to another user

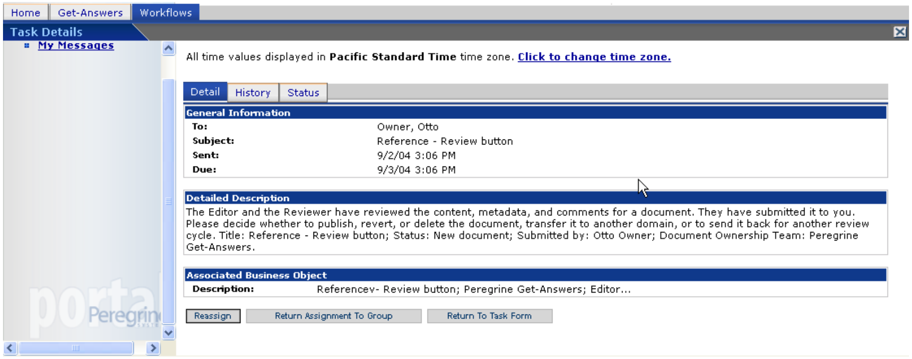
Reassigning a work item to another user adds the work item to the worklist of the other user and removes the work item from your worklist.

Note: To temporarily reallocate all of your work items to any user, see Delegating your worklist to another user on page 65.

To reassign a task to another user:

1. In the workflows page that opens when you selected the task from the My messages page, click **Go to Workflow Details**.

   The Task Details page opens.



Home
Get-Answers
Workflows
Task Details
My Messages
Detail
History
Status
portal
Peregrine

All time values displayed in **Pacific Standard Time** time zone. **Click to change time zone.**

General Information

To:	Owner, Otto
Subject:	Reference - Review button
Sent:	9/2/04 3:06 PM
Due:	9/3/04 3:06 PM

Detailed Description

The Editor and the Reviewer have reviewed the content, metadata, and comments for a document. They have submitted it to you. Please decide whether to publish, revert, or delete the document, transfer it to another domain, or to send it back for another review cycle. Title: Reference - Review button; Status: New document; Submitted by: Otto Owner; Document Ownership Team: Peregrine Get-Answers.

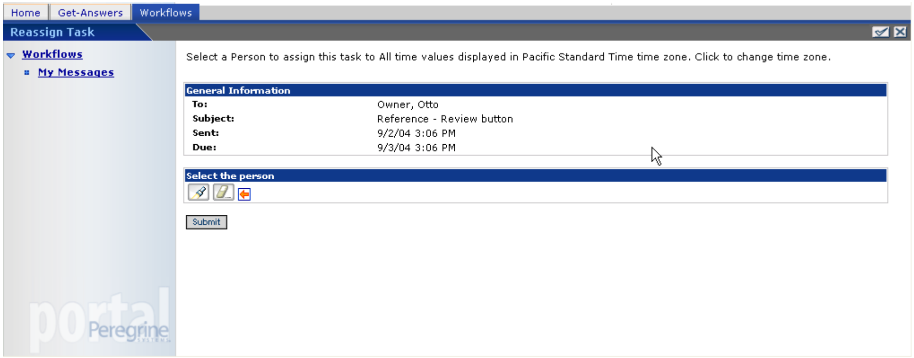
Associated Business Object

Description: Referencev- Review button; Peregrine Get-Answers; Editor...

Reassign
Return Assignment To Group
Return To Task Form

2. On the Details tab, click **Reassign**.

   The Reassign Task page opens.



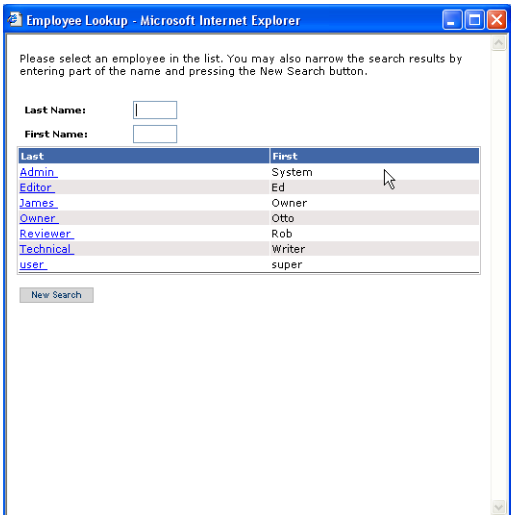
Home
Get-Answers
Workflows
Reassign Task
Workflows
My Messages
Select the person
Submit
portal
Peregrine

Select a Person to assign this task to All time values displayed in Pacific Standard Time time zone. Click to change time zone.

General Information

To:	Owner, Otto
Subject:	Reference - Review button
Sent:	9/2/04 3:06 PM
Due:	9/3/04 3:06 PM

3 In the Reassign Task page, click the search in the **Select the person** frame to display the Employee Lookup window.



Please select an employee in the list. You may also narrow the search results by entering part of the name and pressing the New Search button.

Last Name:

First Name:

Last	First
Admin	System
Editor	Ed
James	Owner
Owner	Otto
Reviewer	Rob
Technical	Writer
user	super

4 Using this window, select the person you want to reassign the work item.

The name of the person selected displays next to the search icon on the details page and in Employee Lookup window closes.

5 In the Reassign Task window, click **Submit**.

The work item is removed from your work list and appears in the work list of the user it was reassigned to.

Reassigning a work item to the group

Reassigning a work item back to the group makes the item available for assignment to any of the team members in the group. For example, if a reviewer accepted a document for review, but then found that they were unable to review the document, the reviewer can use Return Assignment to Group feature. This puts the item back in the list of work items to be accepted by a member or the group. In this example, members of the Reviewer group.

To reassign a work item back to the group:

1. In the Actions column of the In the My messages page, click the **view work flow item's detail** icon for the item you want to reassign to the group.

   The item opens in the Reviewer page.

2. Click **Return Assign To Group**.

   A confirmation message appears at the top of My messages page.

Viewing history

You can use the History tab on the Task Details page to view the history of the work items listed in your message queue.

To view the process instance history:

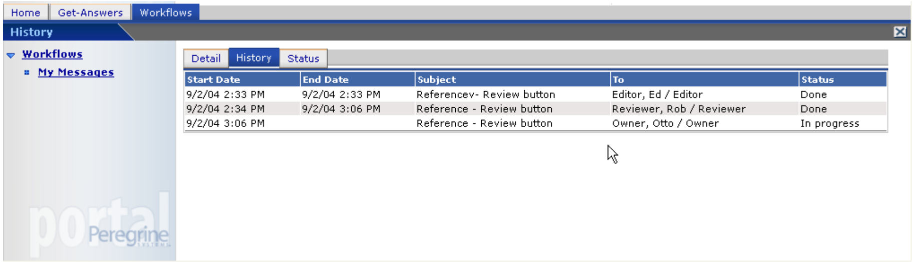
1. From the My Messages page, click the **view work flow item's detail** icon for the item to see a work item task details.

   The Reviewer Editorial page for the selected work item opens.

2 Click **Go to Workflow Details**.

The Task Details page opens.

3 Click the **History** tab to display the list process activities for the item you selected.



Start Date	End Date	Subject	To	Status
9/2/04 2:33 PM	9/2/04 2:33 PM	Referencev- Review button	Editor, Ed / Editor	Done
9/2/04 2:34 PM	9/2/04 3:06 PM	Reference - Review button	Reviewer, Rob / Reviewer	Done
9/2/04 3:06 PM		Reference - Review button	Owner, Otto / Owner	In progress

The history list contains the following columns for the previous work items and the current work item for that specific process instance:

Start Date—The date the work item was started.

End Date—The date the work item was completed.

Subject—A brief description of the document.

To—The name of the person or group assigned the work item.

Status—The status of the work item (such as, **Done** or **In progress**).

Viewing status

You can use the Task Details page to view the status of the activities for a message listed in your message queue.

To view the status of the process instance

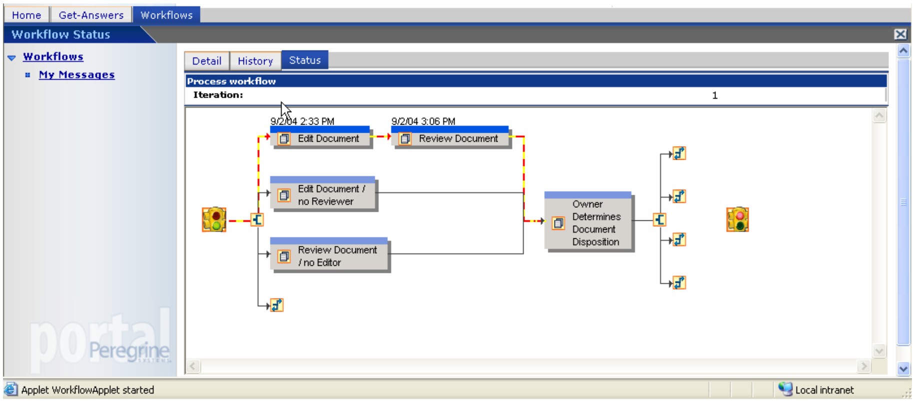
1 From the **My Messages** page on the Workflows tab, click the search icon to see a work item task details.

The Reviewer Editorial page for the selected work item opens.

2 Click **Go to Workflow Details.**

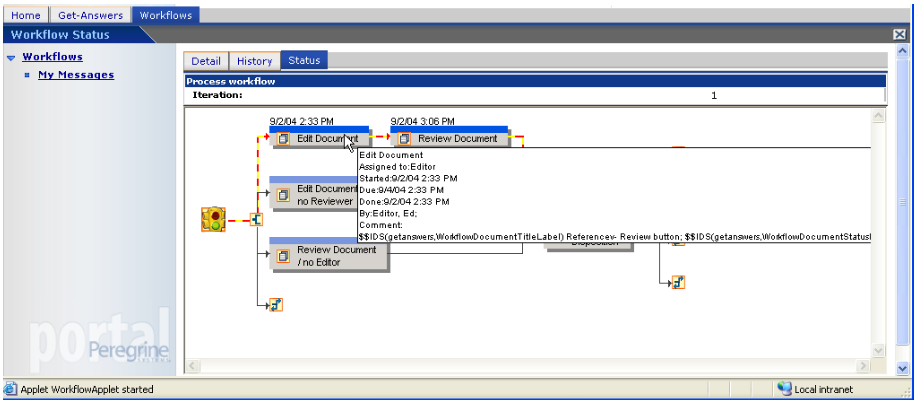
The Task Details page opens.

3 Click the **Status** tab to display a graphical representation of the process instance.


Home
Get-Answers
Workflows
Workflow Status
Workflows
My Messages
Detail
History
Status
Process workflow
Iteration: 1
9/2/04 2:33 PM
Edit Document
9/2/04 3:06 PM
Review Document
Edit Document / no Reviewer
Review Document / no Editor
Owner Determines Document Disposition
portal Peregrine
Applet WorkflowApplet started
Local intranet

Blinking yellow and orange arrows indicate the activities in the process instance that have been completed or are currently in progress. This is true for activities that are executed more than once because of an iteration or jump.

When the cursor is placed over an activity, a ScreenTip shows information about the activity.


Home
Get-Answers
Workflows
Workflow Status
Workflows
My Messages
Detail
History
Status
Process workflow
Iteration: 1
9/2/04 2:33 PM
Edit Document
9/2/04 3:06 PM
Review Document
Edit Document / no Reviewer
Review Document / no Editor
portal Peregrine
Applet WorkflowApplet started
Local intranet

Edit Document
Assigned to:Editor
Started:9/2/04 2:33 PM
Due:9/4/04 2:33 PM
Done:9/2/04 2:33 PM
By:Editor, Ed;
Comment:
$$IDS(getanswers,WorkflowDocumentTitleLabel) Referencev- Review button; $$IDS(getanswers,WorkflowDocumentStatusl

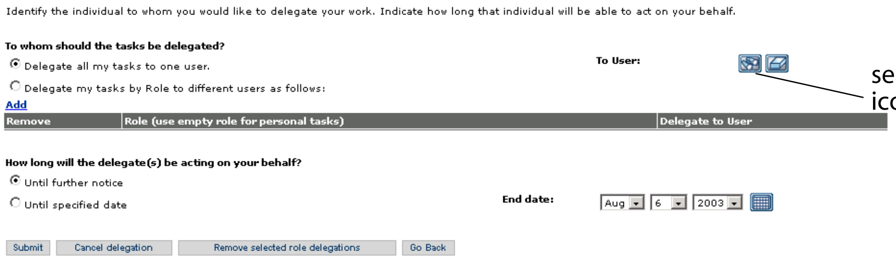
Delegating your worklist to another user

There may be times when you need to delegate your worklist items to another user; for example, when you go on vacation, or when you will be out of the office for several days. In these situations, you can use the temporary delegation feature. When you delegate your worklist to another user, you should select a user that has the same role on the documentation team as your role for the tasks you are delegating. You should refer other situations to the Get-Answers administrator, such as when there are worklist items for people who have left the company or are no longer assigned the same role on a documentation team.

To temporarily delegate your worklist items to another user:

1 Access the My messages page on the Workflows tab.

2 Click **Temporary Delegation** to open the Delegate Approval page.



Identify the individual to whom you would like to delegate your work. Indicate how long that individual will be able to act on your behalf.

To whom should the tasks be delegated?

● Delegate all my tasks to one user.

○ Delegate my tasks by Role to different users as follows:

To User:

Remove	Role (use empty role for personal tasks)	Delegate to User

How long will the delegate(s) be acting on your behalf?

● Until further notice

○ Until specified date

End date: Aug 6 2003

search icon

3 Click the search icon to open the Employee Lookup window.

4 Using this window, select the person to assign to your worklist.

The name of the person selected appears next to the search icon.

5 If you want the delegation to last until further notice, select the **Until further notice** option button.

6 To delegate the item to a specific date, select the **Until specified date** option button.

7 Select the end date from the **End date** drop-down lists.

8 Click **Submit**.

Your work items appear in the worklist of the person assigned in the delegation, and also continue to display in your worklist.

To cancel a delegation:

1 Open the My messages page on the Workflows tab.

2 Click **Temporary Delegation** to display the Delegate Approval page.

3 Click **Cancel Delegation**.

Working with linked documents

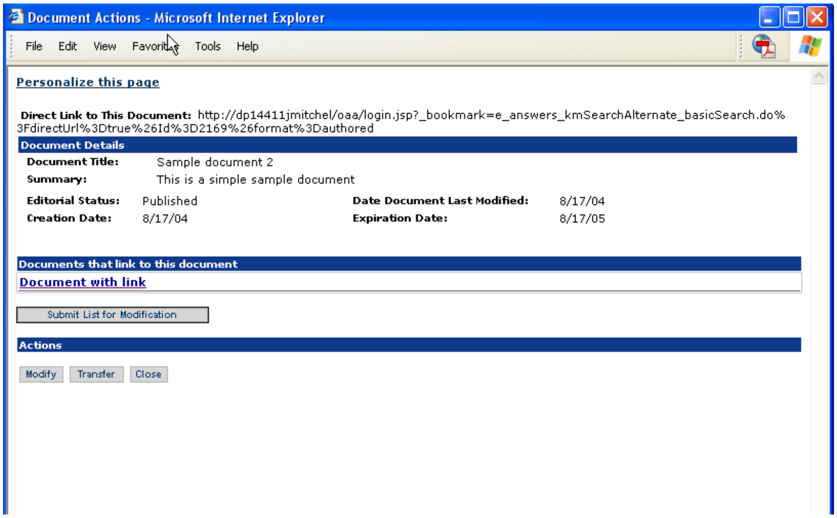
A document becomes linked when another document contains a link to the document. The document that is linked to by one or more other documents is then identified as a “linked document.” For example, if document A contains a link to document B and you view or manage document B, you will see document A listed in the Documents that link to this Document section. You can submit document A to workflow for editing to update or delete the links to document B. This way you can prevent broken links to documents that have been retired.

It is important to managing linked documents when the linked document is modified or retired from the system. All of the links to linked document need to be reviewed and possibly updated or deleted. When you are modifying or retiring a linked document, if you use the Submit List for Modification function, Get-Answers creates an editing tasks in workflow for the documents that link to the linked document. Only published documents are listed as linked documents.

To view a list of documents that link to a document:

1. On the Get-Answers tab, use either search or browse to display a list of documents.

2. Click the **Actions** link to open the document details in the Document Actions window. If the documents is linked to by other documents a list of linked documents appears in the Documents that link to this document section.



Direct Link to This Document: http://dp14411jmitchel/oaa/login.jsp?_bookmark=e_answers_kmSearchAlternate_basicSearch.do%3FdirectUrl%3Dtrue%26Id%3D2169%26format%3Dauthored

Document Details

Document Title: Sample document 2

Summary: This is a simple sample document

Editorial Status: Published

Date Document Last Modified: 8/17/04

Creation Date: 8/17/04

Expiration Date: 8/17/05

Documents that link to this document

Document with link

3. In the Documents that link to this document section you can click the document title to open the document with the link to verify the link or update it if required.

4. If you are the owner of the document (that is, your have rights to modify, transfer, or retire the document currently displayed in the Documents Actions window), the **Submit List for Modification** button appears at the bottom of the list of linked documents.

If you are deleting this document or if the list of documents linking to this document is no longer valid, you can send the list of linked documents to workflow.

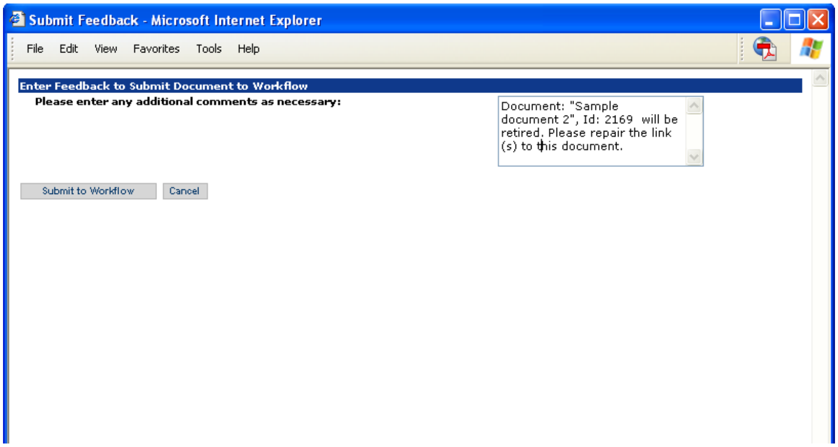
Note: Once the documents with invalid links are in workflow, the links need to be updated. In some cases, you may need the assistance of a Get-Answers

Administrator to use the Link Management utility to reconcile all of the links.

To update the list of linked documents:

1 Click the **Submit List for Modification** button at the bottom of the list of linked documents in the Document Actions window.

The Submit Feedback window opens.



Enter Feedback to Submit Document to Workflow

Please enter any additional comments as necessary:

Document: "Sample document 2", Id: 2169 will be retired. Please repair the link (s) to this document.

The text box in the Submit Feedback window contains text that defaults to the title and document ID for the linked document. The editor or owner of the linked document can use this feedback to update or delete the links in the document. You can modify or add more feedback to the text box as necessary.

Note: If there are any linked documents are in workflow, the feedback is added to any existing feedback in the open or working copy versions of the document.

2 Click **Submit to Workflow**.

The documents in the list of linked documents are submitted to workflow for editing. The documents are placed in the task list of the editor for the document team that owns these documents. See Editorial workflow for the editor on page 53 for a discussion of editing documents.

4

CHAPTER

Working with Documents

Get-Answers can index and search for documents created using the Get-Answers Authoring tool and documents created using other tools. Get-Answers supports the following types of documents:

- Microsoft Office Suite
- Visio (versions 4 or 5)
- Adobe Acrobat (PDF files)
- Plain text (TXT files)
- Rich text (RTF files)
- HTML
- XML

You can import documents in formats other than the ones listed above, but they are not accessible though the Search option. However, you do see these documents in the table of contents and various workflow capabilities.

Topics in this chapter include:

- Document IDs on page 72
- Links on page 72
- Managing your documents on page 72
- Working with document reports on page 77
- Using Get-Answers with ServiceCenter integration on page 85

Document IDs

Each document managed by Get-Answers has a unique Document ID. No two documents managed by an instance of Get-Answers share the same Document ID. Each time you open Get-Answers, a single, globally unique ID (or GUID) is associated with the document. The combination of the system GUID and the Document ID uniquely identify documents across Get-Answers installations. You can use this ID as a link from one document to another.

Links

Get-Answers does not modify external documents. The point of access to documents managed by Get-Answers is through your Web browser. Therefore, any links within external documents continue to work only if your web browser can follow them.

If a link is accessed from a document or web page outside of Get-Answers and you have not yet logged into Get-Answers, a login screen opens. Depending on the login you enter, one of three outcomes is possible:

- If you enter a valid login and have access to the target document, Get-Answers opens in your browser. The target document is displayed in the main document pane.
- If you enter a valid login, but do not have access to the target document, Get-Answers opens in your browser, but with a “permission denied” message in the main document pane.
- If your login attempt fails, an error message opens in your browser.

Managing your documents

Document owners can access and review all comments submitted for the documents for which they are responsible and modify, transfer, or retire documents. Owners can access a table of contents of all published documents managed by the document ownership teams in which they are an owner. Owners can do the following to manage documents:

- View a document.
- View the detail information for a document.
- Retire a document.
- Transfer a document.
- Place a document into an editorial workflow.

Up to three copies of a document can exist at any time. The copies include:

- The published copy
- A working copy in the database
- A copy currently under revision (actively being edited) on the owner's client or workstation (External documents only)

In general, the lifecycle of a document includes the following stages:

Step 1 A document is created within Get-Answers or uploaded from another location into Get-Answers.

Step 2 The new document goes through a review process in Get-Answers Workflows, in which the owner of a team can review the document and add comments before publishing the document or sending it on to another reviewer for approval.

Step 3 The document owner publishes the document. This means anyone with access to the categories in which the document is published can access the document.

Step 4 If a document owner decides a document needs reviewing, that team member creates a working copy. The published copy continues to exist in parallel with the working copy.

Step 5 When an editor or owner of the document makes changes to the document, the changes are made on the working copy of the document during workflow.

Step 6 When the owner publishes the document, the working copy replaces the published version.

Step 7 A member of the document's ownership team decides to retire the published copy of the document. When a document is retired, published copy is retired can only be restored (un-retired) by a user with Administration access.

Note: When you have a large number of documents in a category or subcategory, it may be more efficient and easier to locate the document that you want to review, modify, transfer, or retire by using the search function (Search link on the Get-Answers tab). You can search for a term or phrase in the document and then click the **Actions** link next to the document title in the list of documents returned by the search. The Actions link opens the Document Actions window.

Reviewing document feedback

Document owners can view document feedback to evaluate the usefulness of a document and to determine when a document may need to be updated or retired. Feedback is the combination of comments made about the document with the usefulness value. The usefulness value is a yes/no question.

Note: If there are no feedback comments for a document, the View Feedback button and function will not be available in the Document Actions window. If users have only selected Useful? Yes/No in the feedback form without a typed comment, the View Feedback button is not available.

To view document feedback:

1 From the Get-Answers home page, click the **Get-Answers** tab.

2 Click **Browse Categories** in the Get-Answers menu.

The categories table of contents opens in the Browse Categories window.

3 Use the table of contents to browse to a document by opening the folders for the appropriate category and subcategories. When present, click the **subcategory** link.

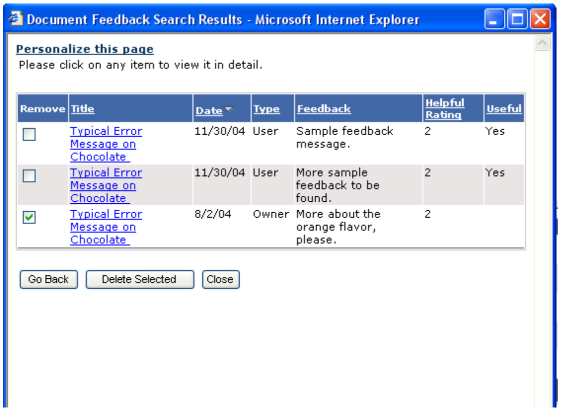
A list of documents opens for the category or subcategory.

4 Click the link for the category or subcategory folder.

5 Click the **Actions** link for the document.

6 In the Document Actions window, click the **View Feedback** button.

The Document Feedback Search Results window opens. You can view all of the feedback for the document in this window.


Document Feedback Search Results - Microsoft Internet Explorer

Personalize this page

Please click on any item to view it in detail.

Remove	Title	Date	Type	Feedback	Helpful Rating	Useful
☐	Typical Error Message on Chocolate	11/30/04	User	Sample feedback message.	2	Yes
☐	Typical Error Message on Chocolate	11/30/04	User	More sample feedback to be found.	2	Yes
☑	Typical Error Message on Chocolate	8/2/04	Owner	More about the orange flavor, please.	2	

7 Click the Title link to view the feedback details.

8 To delete feedback, select the item in the Remove column and click **Delete Selected**.

Modifying, transferring, or retiring documents

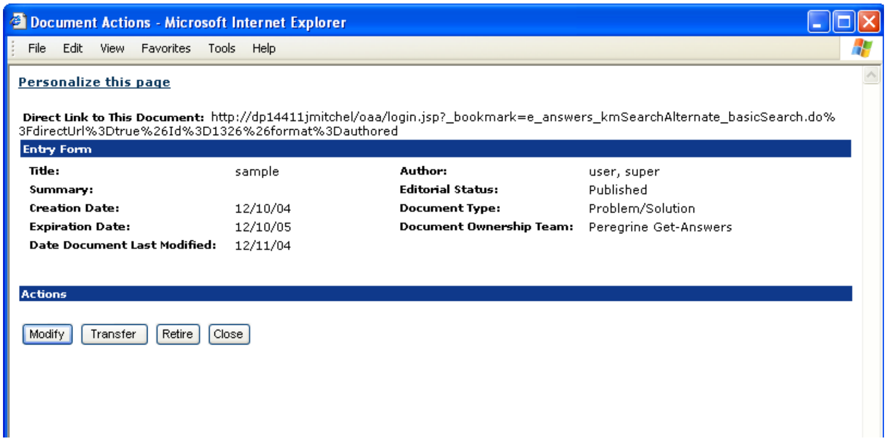
The owner role on a document team is typically responsible for modifying, transferring, or retiring documents as the information in the team's documents becomes out of date.

Note: If there is already a working copy of the document you want to modify, transfer, or retire in workflow, (for example, the working copy is in someone's edit or review task list) the modify, transfer, and retire buttons and functions are not available in the Document Actions window. Also, the Retire button does not appear if there are documents linked to a document.

To modify, transfer, or retire a document

1. From the Get-Answers home page, click the **Get-Answers** tab.
2. User **Search** or **Browse Categories to** find the document you want to modify, transfer, or retire.
3. Click the **Actions** link for the document.

   The Document Action window opens.



Direct Link to This Document: http://dp14411jmitchel/oaa/login.jsp?_bookmark=e_answers_kmSearchAlternate_basicSearch.do%3FdirectUrl%3Dtrue%26Id%3D1326%26format%3Dauthored

Entry Form

Title:	sample	**Author:**	user, super
Summary:		**Editorial Status:**	Published
Creation Date:	12/10/04	**Document Type:**	Problem/Solution
Expiration Date:	12/10/05	**Document Ownership Team:**	Peregrine Get-Answers
Date Document Last Modified:	12/11/04		

Actions

Note: If other documents link to this document, a list of those documents appears in this window. See Retiring linked documents on page 77 for more information.

Once you have the document in the Document Actions window, you can:

- Click **Modify** to place the document back in the editorial workflow and make updates to the document.
- Click **Transfer** to open the Select Document Team for Transfer window and use this window to transfer the document to a different team. This places the document in the Triage workflow for the you selected.
- Click **Retire** to open the Retirement Complete Confirmation window and then click **Close** to confirm that you want the document retired. This removes the document from the database.

Note: When you Retire a document, the HitList does not reflect the change until the search engine reindexes the document database (typically a maximum of 5 minutes).

Retiring linked documents

When you retire a document that is linked to by other documents you need to update those links to avoid having broken links. For a detailed description of updating linked documents, see Working with linked documents on page 66 in Chapter 3, Using the Worklist.

Working with document reports

Get-Answers provides a way to track feedback about documents in its documents reporting options. This section describes how to access this feature. It also describes the information you can get using the documents reporting feature. This information includes view a document's metadata, document feedback, document usage history, search history, and document team activity.

Accessing document reports

Document reports are available from the Reports section in Get-Answers. Certain users do not have the capabilities to see this information. Your Get-Answers administrator can grant you capabilities if you need them.

To access the documents reporting feature

1. From the Get-Answers Home page, click **Get-Answers**.
2. Click the **Reports** link on the left side of the page.

Using the links beneath the Reports link, click the type of information you want to see. For example, click **Document feedback** to see comments about documents.

This option...	Provides this information
Documents	Metadata about documents, such as state (published, working copy, and so on), creation date, or expiration date
Document feedback	Comments from readers who have evaluated the documents
Usage history	List of documents that have been downloaded and by whom. This information includes usefulness ratings.
Search history	List of documents that have been returned in user searches
Document team activity	The history of document team activities such as creating or publishing specific documents

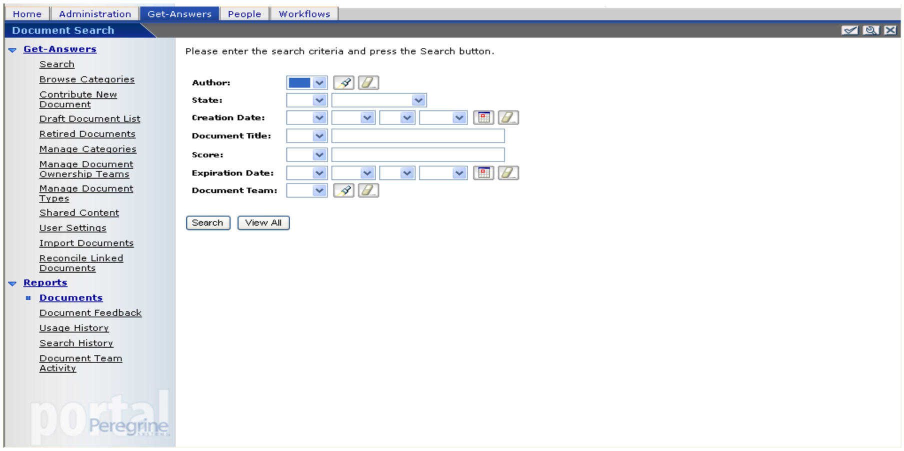
Using the document reporting options

You can use the Reports links in the Get-Answers page to access information about documents.

To view a document's metadata:

1. Click the **Documents** link.

   The Document Search page opens.


Home
Administration
Get-Answers
People
Workflows
Document Search
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Author:
State:
Creation Date:
Document Title:
Score:
Expiration Date:
Document Team:
Search
View All

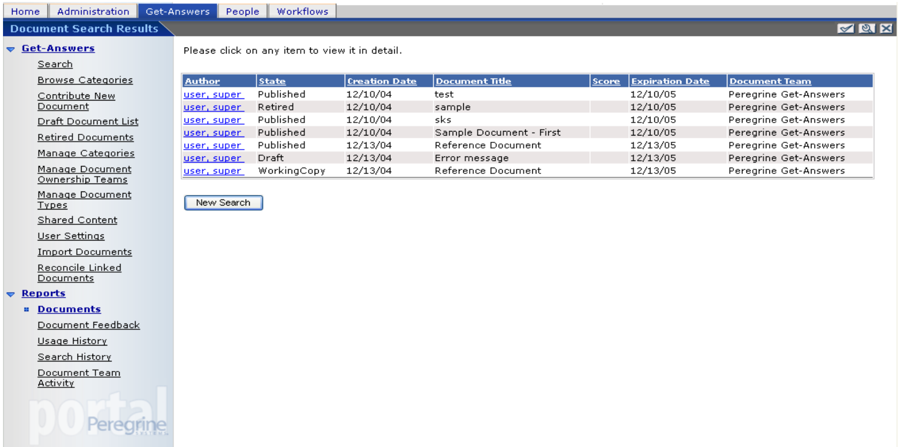
Please enter the search criteria and press the Search button.

2 In the Search page, use the fields to enter the search parameters for the document. The following search operators are available. Note that all string comparisons are performed character by character, from left to right.

Operator	Description
No operator	Equivalent to using the = operator.
=	Search for exact match.
> (greater than)	Search for all strings with a hexadecimal value greater than the string. The hexadecimal ASCII value of a string beginning with 0 (zero) is greater than the hexadecimal ASCII value of a string beginning with any other number or alphabetical character because the hexadecimal ASCII value of 0 (zero) is a tiny value, 0x30. The hexadecimal ASCII value of 9 is greater than that of A. The hexadecimal ASCII value of A is greater than that of Z. The hexadecimal ASCII value of Z is greater than that of the letter a. The hexadecimal ASCII value of the letter a is greater than that of the letter z.
< (less than)	Search for all strings with a hexadecimal ASCII value less than the string.
>= (greater than or equal to)	Search for all strings that have a hexadecimal ASCII value either greater than the string or an exact match.
<= (less than or equal to)	Search for all strings that have a hexadecimal ASCII value either less than the string or an exact match.
like	Search for the substring anywhere within the field where the string is enclosed in percent characters (%). For example, like %av% finds Dave and Avis and lavish; however, the search string like av (not enclosed in % characters) finds exactly either av or Av or aV or AV.

3 Click **Search**.

The Search Results page opens with a list of documents that match your search parameters.

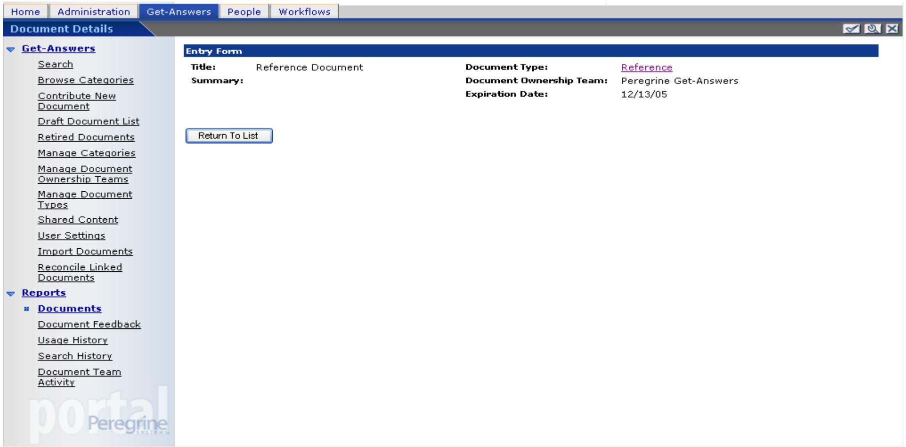

Home
Administration
Get-Answers
People
Workflows
Document Search Results
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
New Search

Please click on any item to view it in detail.

Author	State	Creation Date	Document Title	Score	Expiration Date	Document Team
user, super	Published	12/10/04	test		12/10/05	Peregrine Get-Answers
user, super	Retired	12/10/04	sample		12/10/05	Peregrine Get-Answers
user, super	Published	12/10/04	sks		12/10/05	Peregrine Get-Answers
user, super	Published	12/10/04	Sample Document - First		12/10/05	Peregrine Get-Answers
user, super	Published	12/13/04	Reference Document		12/13/05	Peregrine Get-Answers
user, super	Draft	12/13/04	Error message		12/13/05	Peregrine Get-Answers
user, super	WorkingCopy	12/13/04	Reference Document		12/13/05	Peregrine Get-Answers

4 In the Search Results page, click an Author link to view a summary information for the document.

The Document Details page opens and displays the document details.


Home
Administration
Get-Answers
People
Workflows
Document Details
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Entry Form
Return To List

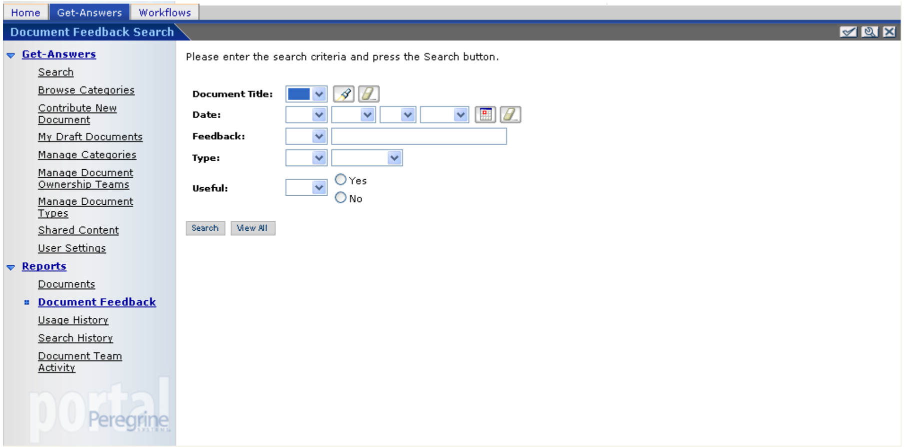
Title: Reference Document
Summary:
Document Type: Reference
Document Ownership Team: Peregrine Get-Answers
Expiration Date: 12/13/05

5 You can click the **Document Type** link to view the document or **Return to List** to select another document.

To view document feedback:

1 Click the **Document Feedback** link.

The search page opens.


Home
Get-Answers
Workflows
Document Feedback Search
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
Document Title:
Date:
Feedback:
Type:
Useful:
○ Yes
○ No
Search
View All

Please enter the search criteria and press the Search button.

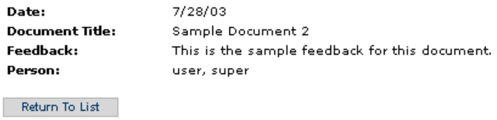
2 Use this page to enter search parameters to limit the search.

3 Click **Search to display a list of documents that match the search parameters,** or click **View All** to display a list of all the documents you own for which feedback is available.

The Search Results page opens.

4 In the Search Results page, click a document's link to see the information.

The Document Details page opens and displays the document feedback details.



Date:	7/28/03
Document Title:	Sample Document 2
Feedback:	This is the sample feedback for this document.
Person:	user, super

Return To List

To view document usage history:

1 Click the **Usage History** link.

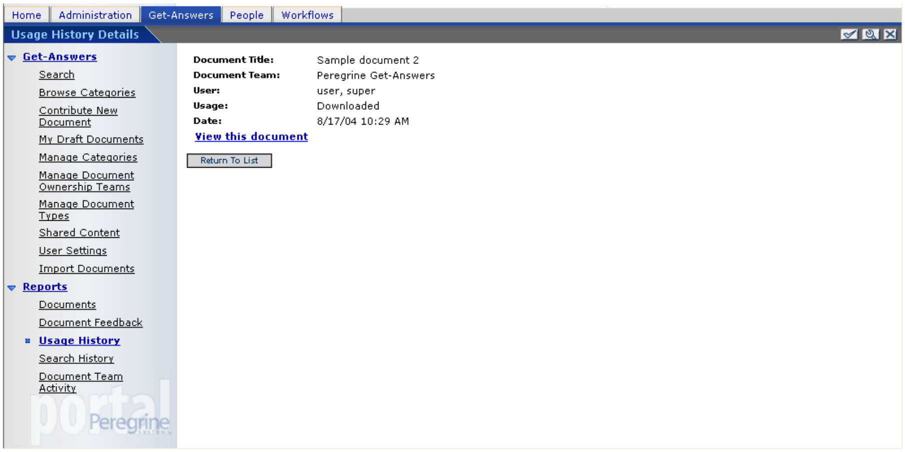
The Search page opens.

2 In the Search page, use the fields to enter the search parameters to search for a document.

3 Click **Search to search for a document or View All** to display a list of all the documents.

The Usage History Search Results page opens.

4 In the Usage History Search Results page, click the **Document Title** link to display the Usage History Details page for the document.


Home
Administration
Get-Answers
People
Workflows
Usage History Details
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
View this document
Return To List

Document Title: Sample document 2
Document Team: Peregrine Get-Answers
User: user, super
Usage: Downloaded
Date: 8/17/04 10:29 AM

5 Click **View this document**, to open the document in a preview window.

To view document search history:

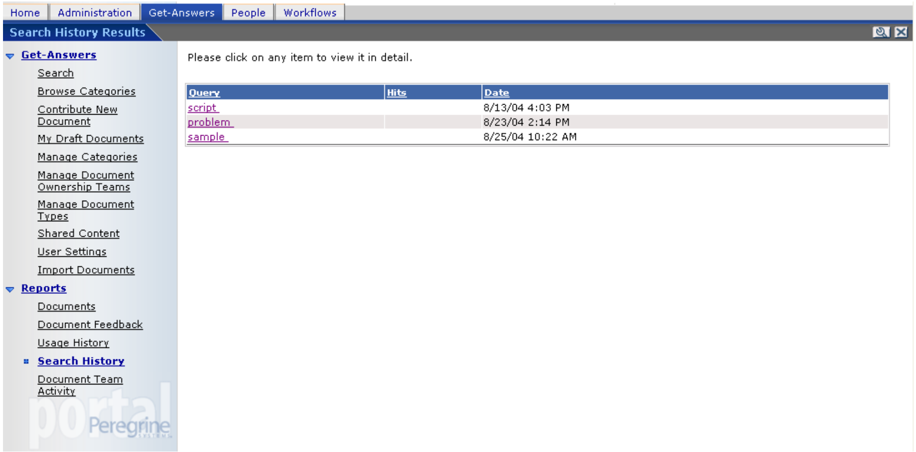
1 Click the **Search History** link.

The Search page opens.

2 In the Search page, use the fields to enter the search parameters for the document.

3 Click **Search or View All.**

The Search Results page opens. From this page you can see the number of times a document has been part of a search results list (hits).

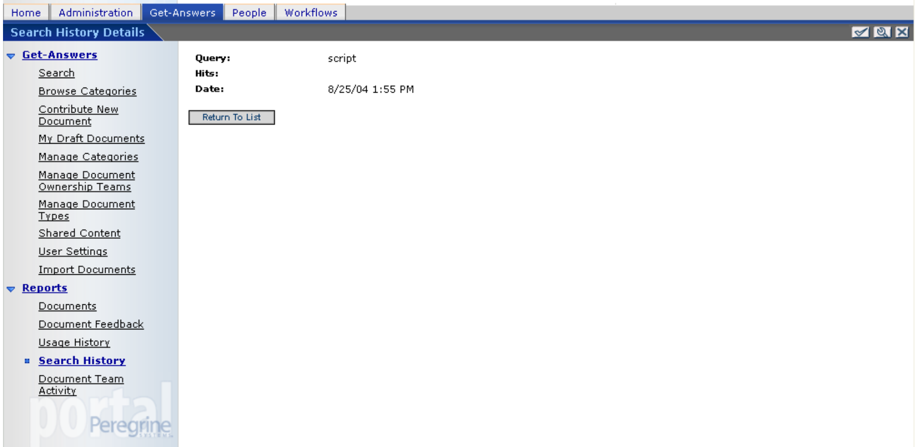

Home
Administration
Get-Answers
People
Workflows
Search History Results
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine

Please click on any item to view it in detail.

Query	Hits	Date
script		8/13/04 4:03 PM
problem		8/23/04 2:14 PM
sample		8/25/04 10:22 AM

4 In the Search Results page, click link in the Query column to view search history details for the query.

The Search History Details page opens and displays the search history for the document query. This information allows you to see what queries have been used to find the document.


Home
Administration
Get-Answers
People
Workflows
Search History Details
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
Return To List
portal
Peregrine

Query: script
Hits:
Date: 8/25/04 1:55 PM

To view document team activity:

1 Click the **Document Team Activity** link.

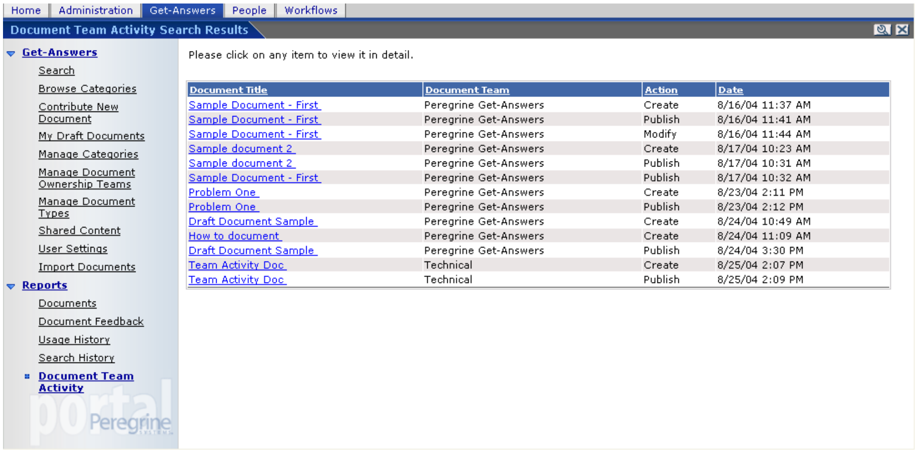
The Document Team Activity Search page opens.

2 In the Search page, use the fields to enter the search parameter or parameters for a specific document, a group of documents, or a document team.

- Action - the actions are Create, Modify, Publish or all actions (blank in the drop-down list).
- Date - the date of an action (create, modify, publish) on the document.
- Document Title - the title of the document.
- Document Team - the document team name.

3 Click **Search to view a document or set of document, or View All to list all of the documents**.

The Document Team Activity Search Results page opens.

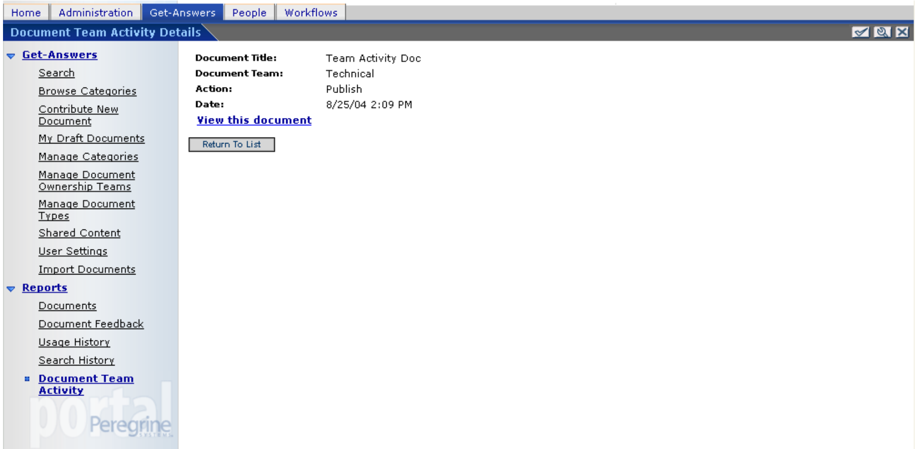

Home
Administration
Get-Answers
People
Workflows
Document Team Activity Search Results
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine

Please click on any item to view it in detail.

Document Title	Document Team	Action	Date
Sample Document - First	Peregrine Get-Answers	Create	8/16/04 11:37 AM
Sample Document - First	Peregrine Get-Answers	Publish	8/16/04 11:41 AM
Sample Document - First	Peregrine Get-Answers	Modify	8/16/04 11:44 AM
Sample document 2	Peregrine Get-Answers	Create	8/17/04 10:23 AM
Sample document 2	Peregrine Get-Answers	Publish	8/17/04 10:31 AM
Sample Document - First	Peregrine Get-Answers	Publish	8/17/04 10:32 AM
Problem One	Peregrine Get-Answers	Create	8/23/04 2:11 PM
Problem One	Peregrine Get-Answers	Publish	8/23/04 2:12 PM
Draft Document Sample	Peregrine Get-Answers	Create	8/24/04 10:49 AM
How to document	Peregrine Get-Answers	Create	8/24/04 11:09 AM
Draft Document Sample	Peregrine Get-Answers	Publish	8/24/04 3:30 PM
Team Activity Doc	Technical	Create	8/25/04 2:07 PM
Team Activity Doc	Technical	Publish	8/25/04 2:09 PM

4 In the Document Team Search Results page, click a document's link to view the document team activity details for the document action.

The Document Activity Details page opens and displays the document title, document team, action, and date.


Home
Administration
Get-Answers
People
Workflows
Document Team Activity Details
Get-Answers
Search
Browse Categories
Contribute New Document
My Draft Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reports
Documents
Document Feedback
Usage History
Search History
Document Team Activity
portal
Peregrine
View this document
Return To List

Document Title: Team Activity Doc
Document Team: Technical
Action: Publish
Date: 8/25/04 2:09 PM

5 Click **View this document**, to open the document in a preview window.

Using Get-Answers with ServiceCenter integration

This section describes how to use Get-Answers when it is being used a knowledge base for Peregrine's ServiceCenter.

Using ServiceCenter integration with Get-Answers

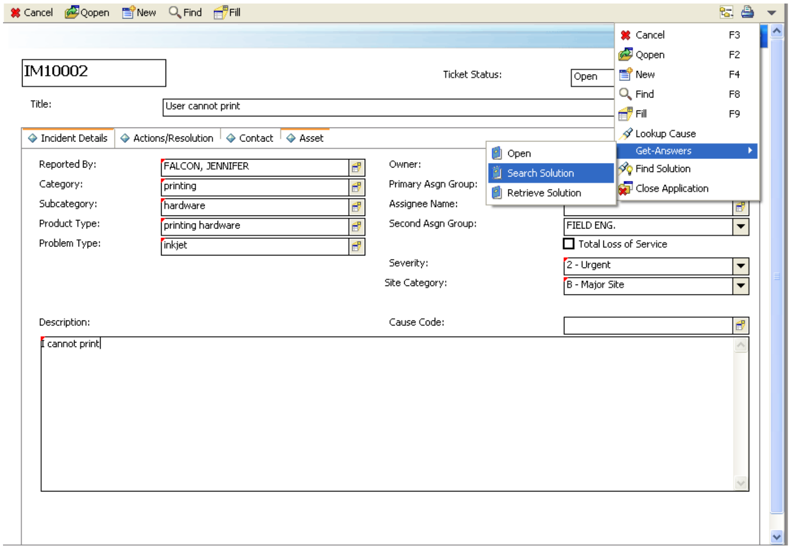
This section describe an example of how to use ServiceCenter integratiion with Get-Answers. In this example, there is a printer document in Get-Answers that provides a solution for someone having printing problems.

To use the ServiceCenter integration with Get-Answers:

1 Open a sample incident in Get-Services relating to a printer problem.

2 Complete the required information in the incident form.

3 Use the drop-down menu to select **Get-Answers** > **Search**.


Cancel
Qopen
New
Find
Fill
Cancel F3
Qopen F2
New F4
Find F8
Fill F9
Lookup Cause
Get-Answers
Find Solution
Close Application
Open
Search Solution
Retrieve Solution
Incident Details
Actions/Resolution
Contact
Asset

IM10002

Ticket Status: Open

Title: User cannot print

Reported By: FALCON, JENNIFER

Category: printing

Subcategory: hardware

Product Type: printing hardware

Problem Type: inkjet

Owner:

Primary Asgn Group:

Assignee Name:

Second Asgn Group: FIELD ENG.

☐ Total Loss of Service

Severity: 2 - Urgent

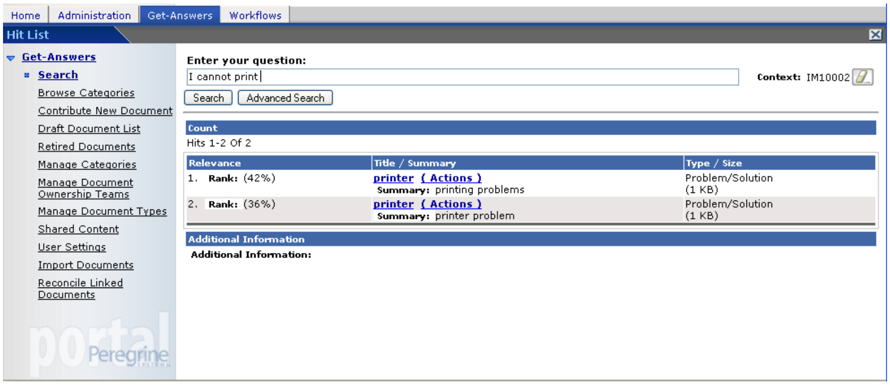
Site Category: B - Major Site

Description: I cannot print

Cause Code:

The Get-Answers portal opens. You may have to logon to Get-Answers if your system is not configured for automatic logon. In the Get-Answers portal you should see a search screen that displays a list of result for the search. Note that the Context field contains the associated Incident Management number that generated the search results.

Note: All ServiceCenter logons and Get-Answers logons have to be the same. See Chapter 8, Get-Answers Security for addition information on integrated logins.


Home
Administration
Get-Answers
Workflows
Hit List
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
portal
Peregrine
Search
Advanced Search

Enter your question: I cannot print

Context: IM10002

Count

Hits 1-2 Of 2

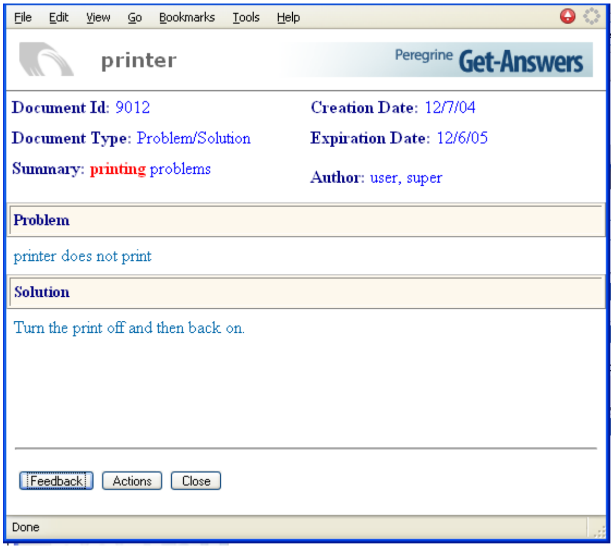
Relevance	Title / Summary	Type / Size
1. Rank: (42%)	printer (Actions) Summary: printing problems	Problem/Solution (1 KB)
2. Rank: (36%)	printer (Actions) Summary: printer problem	Problem/Solution (1 KB)

Additional Information

Additional Information:

4 Click the document link title to view the document.

The document opens in the Document Viewer window.


File
Edit
View
Go
Bookmarks
Tools
Help
Peregrine Get-Answers
Feedback
Actions
Close
Done

printer

Document Id: 9012

Creation Date: 12/7/04

Document Type: Problem/Solution

Expiration Date: 12/6/05

Summary: printing problems

Author: user, super

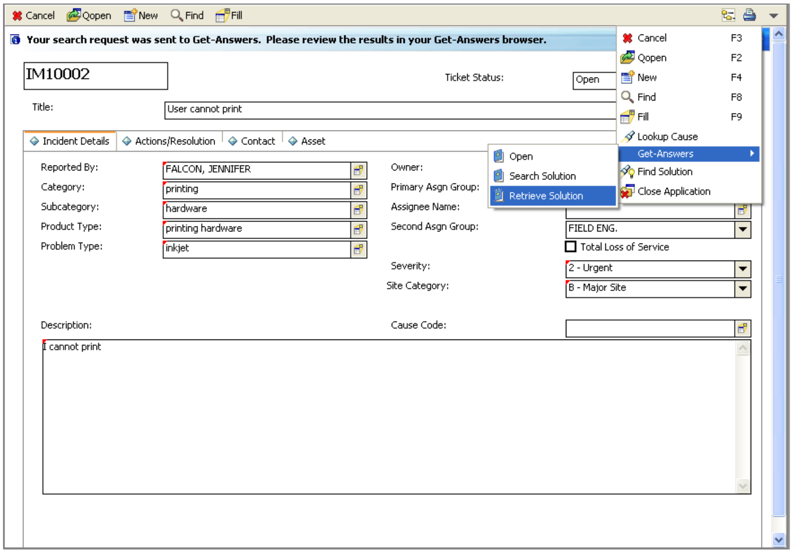
Problem

printer does not print

Solution

Turn the print off and then back on.

5 In ServiceCenter use the drop-down menu to retrieve the solution.


Cancel
Qopen
New
Find
Fill
Incident Details
Actions/Resolution
Contact
Asset
Cancel F3
Qopen F2
New F4
Find F8
Fill F9
Lookup Cause
Get-Answers
Find Solution
Close Application
Open
Search Solution
Retrieve Solution

Your search request was sent to Get-Answers. Please review the results in your Get-Answers browser.

IM10002

Ticket Status: Open

Title: User cannot print

Reported By: FALCON, JENNIFER

Category: printing

Subcategory: hardware

Product Type: printing hardware

Problem Type: inkjet

Owner:

Primary Asgn Group:

Assignee Name:

Second Asgn Group: FIELD ENG.

☐ Total Loss of Service

Severity: 2 - Urgent

Site Category: B - Major Site

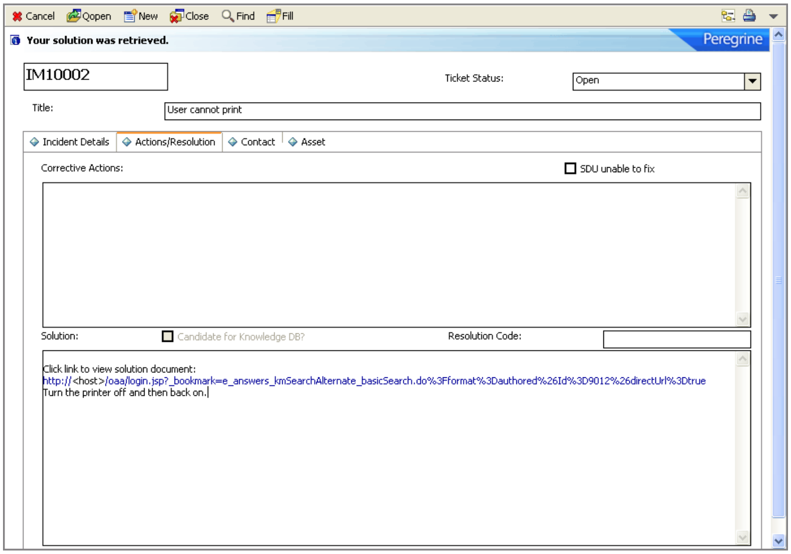
Description:

Cause Code:

I cannot print

6 Click the **Actions/Resolutions** tab.

The solution you retrieved from Get-Answers appears in the Solution text box.



Your solution was retrieved.

IM10002

Ticket Status: Open

Title: User cannot print

Corrective Actions:

☐ SDU unable to fix

Solution: ☐ Candidate for Knowledge DB?

Resolution Code:

Click link to view solution document:
http://<host>/oaa/login.jsp?_bookmark=e_answers_kmSearchAlternate_basicSearch.do%3Fformat%3Dauthored%26Id%3D9012%26directUrl%3Dtrue
Turn the printer off and then back on.

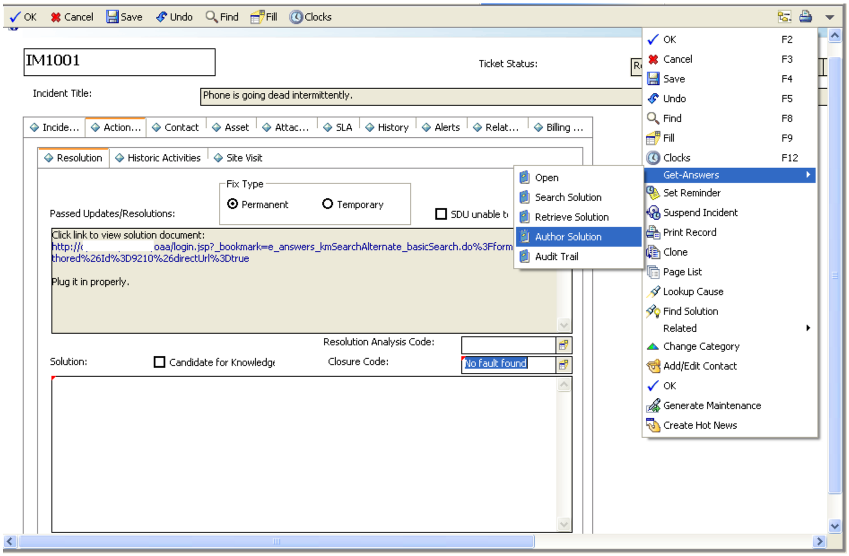
Publishing an incident resolution to the knowledge base

When you have integrated ServiceCenter with Get-Answers you can publish solutions to incidents that are resolved directly to the Get-Answers knowledge base.

To publish a resolution to an incident:

1 In ServiceCenter, use a closed or resolved incident to begin the process by finding a closed incident.

2 On the drop-down menu, select **Get-Answers** > **Author Solution**.


OK
Cancel
Save
Undo
Find
Fill
Clocks
Ticket Status:
Inside…
Action…
Contact
Asset
Attac…
SLA
History
Alerts
Relat…
Billing …
Resolution
Historic Activities
Site Visit
Fix Type
SDU unable t
Solution:
Candidate for Knowledge
Resolution Analysis Code:
Closure Code:
Open
Search Solution
Retrieve Solution
Author Solution
Audit Trail
OK F2
Cancel F3
Save F4
Undo F5
Find F8
Fill F9
Clocks F12
Get-Answers
Set Reminder
Suspend Incident
Print Record
Clone
Page List
Lookup Cause
Find Solution
Related
Change Category
Add/Edit Contact
OK
Generate Maintenance
Create Hot News

IM1001

Incident Title: Phone is going dead intermittently.

Fix Type: ● Permanent ○ Temporary

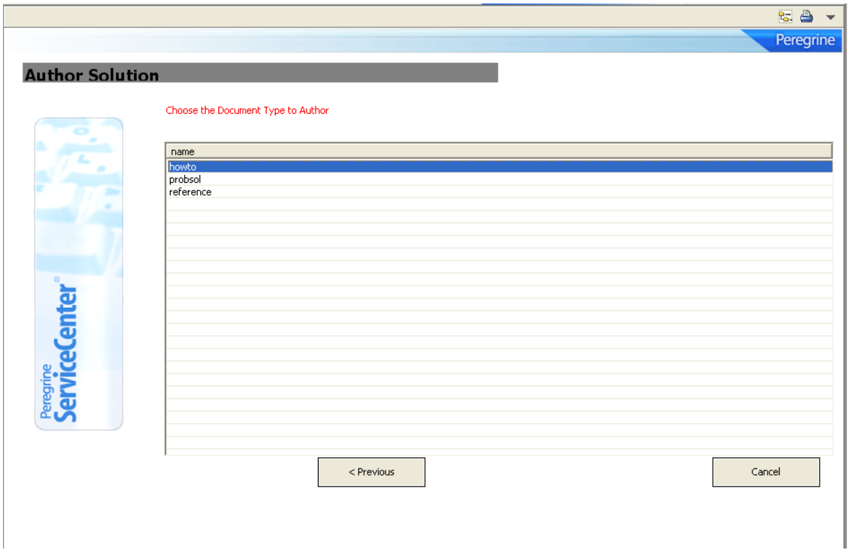
Passed Updates/Resolutions:

Click link to view solution document:
http://(oaa/login.jsp?_bookmark=e_answers_kmSearchAlternate_basicSearch.do%3Fform
thored%26Id%3D9210%26directUrl%3Dtrue

Plug it in properly.

Closure Code: No fault found

The Author Solution page opens.


Peregrine
Peregrine ServiceCenter
< Previous
Cancel

Author Solution

Choose the Document Type to Author

name
howto
probsol
reference

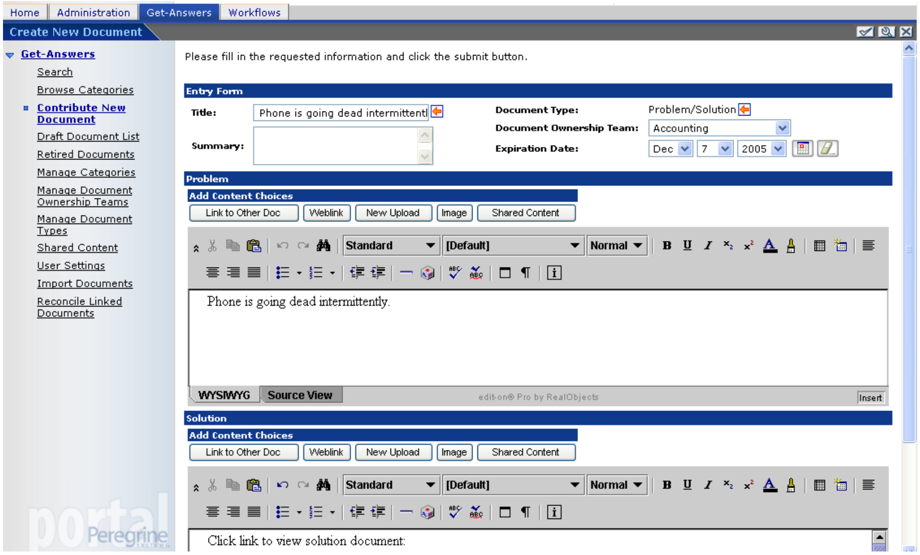
3 Select the document type from the list. These document types match the default document types available in Get-Answers.

Note: The available document types are configured in the getansdoctype table in ServiceCenter.

4 Double-click the document type. (For this example, probsol).

The Get-Answers Create New Document page opens in a browser window. The document type that opens serves as a model for the new document you are going to create.

Note: You may have to log on to Get-Answers if you are not currently logged on, or automatically authenticated.


Home
Administration
Get-Answers
Workflows
Create New Document
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
Entry Form
Problem
Add Content Choices
Link to Other Doc
Weblink
New Upload
Image
Shared Content
Standard
[Default]
Normal
WYSIWYG
Source View
edit-on® Pro by RealObjects
Insert
Solution
portal
Peregrine

Please fill in the requested information and click the submit button.

Title: Phone is going dead intermittentl

Summary:

Document Type: Problem/Solution

Document Ownership Team: Accounting

Expiration Date: Dec 7 2005

Phone is going dead intermittently.

Click link to view solution document:

5 Use Get-Answers to create a new document for the knowledge base.

Viewing the audit trail for an incident

You can use the Audit Trail feature to view what searches were performed and what documents were viewed or retrieved for an incident. This can help you better manage the knowledge base or search for other knowledge articles.

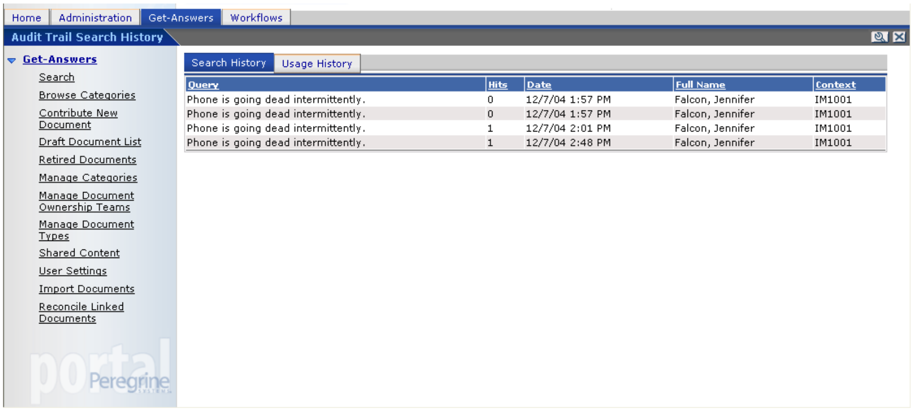
To view the audit trail for an incident:

1 In ServiceCenter, search for and display and incident ticket.

2 On the drop-down menu, select **Get-Answers** > **Audit Trail**.

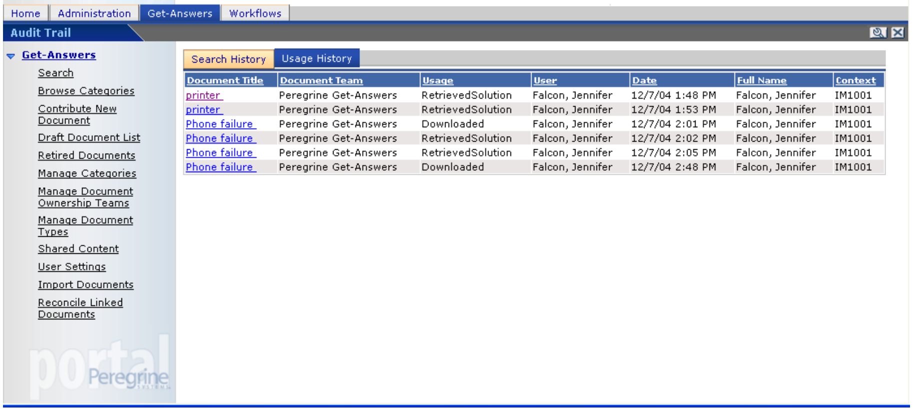
The Get-Answers Audit Trail Search History page opens in browser window.

Note: You may have to log on to Get-Answers if you are not currently logged on, or automatically authenticated.


Home
Administration
Get-Answers
Workflows
Audit Trail Search History
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
portal
Peregrine
Search History
Usage History

Query	Hits	Date	Full Name	Context
Phone is going dead intermittently.	0	12/7/04 1:57 PM	Falcon, Jennifer	IM1001
Phone is going dead intermittently.	0	12/7/04 1:57 PM	Falcon, Jennifer	IM1001
Phone is going dead intermittently.	1	12/7/04 2:01 PM	Falcon, Jennifer	IM1001
Phone is going dead intermittently.	1	12/7/04 2:48 PM	Falcon, Jennifer	IM1001

3 Click the Usage History page to view how the documents were used.


Home
Administration
Get-Answers
Workflows
Audit Trail
Get-Answers
Search
Browse Categories
Contribute New Document
Draft Document List
Retired Documents
Manage Categories
Manage Document Ownership Teams
Manage Document Types
Shared Content
User Settings
Import Documents
Reconcile Linked Documents
portal
Peregrine
Search History
Usage History

Document Title	Document Team	Usage	User	Date	Full Name	Context
printer	Peregrine Get-Answers	RetrievedSolution	Falcon, Jennifer	12/7/04 1:48 PM	Falcon, Jennifer	IM1001
printer	Peregrine Get-Answers	RetrievedSolution	Falcon, Jennifer	12/7/04 1:53 PM	Falcon, Jennifer	IM1001
Phone failure	Peregrine Get-Answers	Downloaded	Falcon, Jennifer	12/7/04 2:01 PM	Falcon, Jennifer	IM1001
Phone failure	Peregrine Get-Answers	RetrievedSolution	Falcon, Jennifer	12/7/04 2:02 PM	Falcon, Jennifer	IM1001
Phone failure	Peregrine Get-Answers	RetrievedSolution	Falcon, Jennifer	12/7/04 2:05 PM	Falcon, Jennifer	IM1001
Phone failure	Peregrine Get-Answers	Downloaded	Falcon, Jennifer	12/7/04 2:48 PM	Falcon, Jennifer	IM1001

4 You can click the document title link to open the document in the Document Viewer window. In this window, you can use the document feedback function and possibly other Get-Answers functions if you are a document owner.

A CHAPTER Search Queries

How the Get-Answers search works

The Get-Answers Basic Search provides a simple concept search. The Get-Answers Advanced Search provides three primary search types: Concept or Natural Language Search, Pattern or Search for Spelling Variants, and Boolean.

In Concept search mode in the Basic or Advanced Search Form, Get-Answers uses the English-language dictionaries and thesauri as a knowledge base from which to process your queries. These queries provide information about word meanings, syntax, word variations, and relationships between words. These defined relationships between words make it possible to link them together in a “semantic network.”

In the network, each word meaning has an associated list of words and link strengths, indicating how closely each word is linked to that meaning. Individual words can be linked to multiple meanings, at different strengths. You can control how many and which links are traversed by changing the expansion level, or by using no expansion at all.

The semantic network makes it possible for Get-Answers to search for *concepts, or units of meaning*, instead of searching for just exact matches to your query words. For example, a query of “job seeker” may also locate the similar concepts of “applicants,” “candidates,” “hired,” and “opening.” Because the search engine can search for concepts, it delivers a far more complete and relevant set of responses than other text retrieval programs.

In Pattern search mode in the Advanced Search Form, also known as "Search for Spelling Variants", you can search for *patterns* that match your query; this can be useful in situations where you have "dirty" OCR data, or words with various or difficult spellings.

Boolean mode in the Advanced Search Form is a fast way to look up documents with (or without) a specific term or terms.

The query pipeline

The Get-Answers search process can be viewed as a pipeline. At one end, you enter query words. During their journey down the pipeline, the query words undergo several phases of analysis and processing. This processing both contracts and expands the original list of query words, until at the end of the pipeline, a final search list is created.

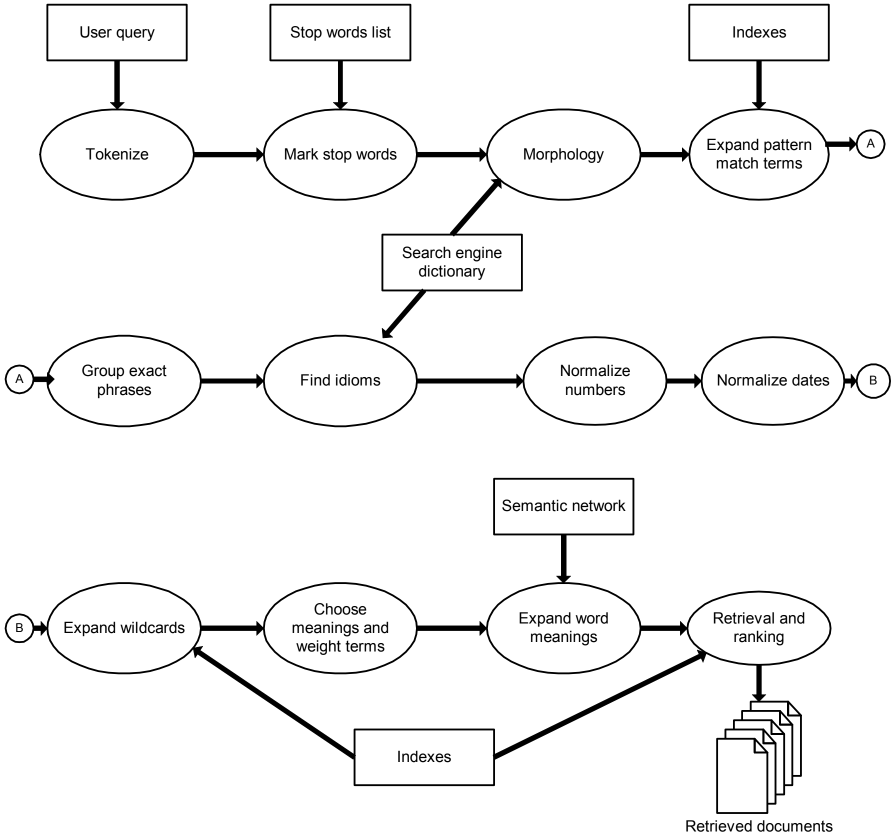
First, the words are tokenized (tokenization breaks strings of characters into words, including special forms such as dates or phone numbers). The dictionary is used for morphological analysis (reducing words to simpler forms by stripping off suffixes and re-spelling plurals) and idiom processing (translating phrases that have a meaning beyond that of the individual words, such as "real estate").

Also removed are certain small-function words called stop words (like "the" or "of") that provide little value in locating the information you're looking for. As the query words travel farther down the pipeline, they're expanded via the dictionary and the links in the semantic network. When the search engine expands words, it finds other terms and concepts related to the query words and adds them to the list of search terms. The list of words is ranked, so that exact query words are ranked highest, then closely related terms, then more distantly related terms. This ranked word list is used by the search engine program to search the indexes to the documents in the library. During the search, the program determines:

- How many of the exact query words are contained in a document
- How many related terms there are
- What the relationships are (strong synonym, antonym, related-to, etc.)
- The proximity (physical distance from each other) of relevant words within a document

Using this information, Get-Answers identifies and ranks the "hit words" in documents. Based on the strength and number of these hits, documents are found and ranked in order of probable relevance.

A summary diagram of the search process follows.


User query
Stop words list
Indexes
Tokenize
Mark stop words
Morphology
Expand pattern match terms
A
Search engine dictionary
A
Group exact phrases
Find idioms
Normalize numbers
Normalize dates
B
Semantic network
B
Expand wildcards
Choose meanings and weight terms
Expand word meanings
Retrieval and ranking
Indexes
Retrieved documents

- Tokenizing identifies strings of characters as words, dates, or numbers.
- Small-function stop words are marked within the query word list.
- Morphology reduces query words to their root forms.
- If any query word has a **pattern matching** operator (~), or if you're in Pattern search mode, the list of query words is expanded to include words in the library that match the pattern search word.
- Words enclosed in quotation marks (" ") are grouped so that they can be searched as **exact phrases**.

- **Idioms** (such as “real estate” or “ice cream”) are identified so that occurrences of the phrase are ranked higher than occurrences of the individual words.
- Numeric entries are normalized so that they can be searched on as **numbers or dates**, as appropriate.
- If any query word has a **wildcard** (*,?,[*search expression*], _, \, @, #, ^), the list of query words is expanded to include words in the library that match the wildcard.
- Using **semantic network expansion**, words related to the remaining query words are added to the query word list.
- Documents are **ranked by relevance** and displayed in a list.

Query recall

Using the search engine, you control the recall by setting the level to which words are expanded. Word expansion levels tell the system how “deep” into the semantic network to go when looking for terms related to your query words (and thus relevant to the search). Word expansion levels (and examples for a single definition of the word “catch”) are defined as follows:

- Exact word matches and morphological variants (catch, catches)
- Simple variations (caught, catching)
- Most strongly related concepts (beat, beaten, rest, rested)

  Example: beaten as in 'caught heck', rest as in 'catch a few winks or zzz' (English colloquialisms)
- Strongly related concepts (put across, imprison, put away. jail, incarcerate, land, isolate)

  Example: put across as in tricked or 'put one over me', land as in catch a fish
- Weakly related concepts (jam, obtrude, reel, cock, burn, fix firmly)

These examples for the word ‘catch’ depend on your search engine settings and the context of the search word in the document. For example, the higher you set the word expansion level on the Advanced Search screen, and the higher the system-wide Administration setting ‘Word List Expansion Limit’ is set, the greater the recall, but also potentially lesser the precision. The context of the word in the document as a noun or verb also determines the result list that you will see.

Understanding ranking

During the query process, the last activities performed by the search engine are “coarse grain” and “fine grain” ranking. During this process documents are retrieved and ranked. (This process applies only to Concept or Pattern queries, not Boolean.)

In *coarse grain ranking*, the search engine simply looks for the existence or absence of query words or related terms in the document. The program retrieves the top documents—up to the maximum number of documents you set—based on the coarse grain rank. The program then performs fine grain ranking on those retrieved documents.

In *fine grain ranking*, the search engine analyzes the retrieved documents to determine the exact document rank. This rank value is used to sort the documents so that you see documents in order of probable relevance.

The following explains more about how each of these processes works.

Coarse grain rank calculation

The coarse grain rank calculation takes into account the following factors. Each factor adds a certain relative “weight” to the document. Added together, these weights determine a document’s relevance.

Important: Completeness is the greater the number of query words (either exactly or by preference), the higher the weight.

A relevant document should contain at least one term or related term for each word in the original query. If the document contains only a fraction of the original words, then the maximum rank of the document is equal to this fraction. For example, if the document contains only 3 out of the 4 original terms in the query, then its maximum rank is 75%. Related terms contribute less weight than the original (exact) words. If you assign different weights to query words, these weights are factored into the completeness score.

If your query consists of three query terms, a document containing one instance of each of the three terms will be ranked higher than a document containing 100 instances of one of the query terms.

Important: Contextual evidence means the greater the number of related terms, the higher the weight.

Words are supported by their related terms. If a document contains a word and its related terms, the word is given a higher weight because it's surrounded by supporting evidence. For example, the word “charge” near the words “credit,” “debt,” and “card” is more likely to mean “charge card” than to mean “ward,” “battery energy,” or “to assign a task.”

Important: Semantic Distance means the more closely related the terms, the higher the weight.

The semantic network contains information on how closely two terms are related (for example, words that are synonyms of each other are more closely related than words that are defined as antonyms of one another). This is used to compute the amount of contextual evidence that supports a word. The closer the terms are in relationship to the query words, the more weight they are given. Thus, ranking order is adjusted accordingly based on semantic distance. Morphological variants, such as “supply,” “supplying,” and “supplies,” are treated as exact matches. Don't confuse the *semantic* distance of terms with the *physical* distance that separates hit words in a document—physical distance is used in fine grain ranking, as discussed below.

Fine grain rank calculation

The fine grain rank calculation looks at the physical location of query words and related terms within the document, as well as the total number of terms. By default, a document's fine grain rank is calculated using a formula that equally combines the factors described here.

Important: Proximity: The closer together the query words and related terms within the document, the greater the weight.

A document is judged more relevant if it contains related terms that occur close together, preferably in the same sentence or paragraph. The system computes a factor for physical proximity, which is greatest for adjacent terms, and lessens as terms become increasingly distant (physically) from each other. Thus, documents with many hits close together are ranked higher than documents where those same hits are present, but scattered very far apart.

Important: Hit Density: The greater the ratio of query words and related terms to the total number of words in the document, the greater the weight.

A document is judged more relevant if a large number of the total number of words in it are query words or related terms. Thus, short documents with many hits are ranked higher than longer documents where those same hits are present.

Important: Coarse Grain Value: The search engine uses the coarse grain value determined during the coarse grain ranking process. For details about coarse grain factors (completeness, contextual evidence, semantic distance), see "Coarse grain rank calculation" above.

Comparison of query types

All queries are processed in one of the three main query modes (Concept, Pattern or Search for Spelling Variants, and Boolean). There are other query types that may be used either in conjunction with the primary query, or after the initial query. Following is a comparison of ways to narrow or widen the search, ease of use, and general response time for each query, as well as conditions under which you might want to use that type of query.

Concept search

A primary query mode that lets you enter plain English queries with no operators automatically does semantic expansion on all query words to the level you set ranks returned documents for relevance

- Search is **narrowed** by:
  - setting a lower word expansion level and/or number of expansion words
  - including an exact phrase in double quotes

- Search is **widened** by:
  - setting the word expansion level and/or number of expansion words higher
  - using a special operator to designate a specific query word for pattern (~) or wildcard (*, ?, *[search expression]*, _, @, #, ^) expansion

- Search process is typically slower than Boolean searches, since ranking and semantic expansion are performed; however, recall and precision are higher, making response evaluation faster and easier.
- Most effective when:
  - you're first learning the system (it's one of the easiest searches to do)
  - you need to perform a "quick and dirty" search
  - you know the words you're searching for exist in the database (if semantic expansion is set to level 1, a Concept search almost always outperforms a Boolean search)

Pattern search or Search for Spelling Variants

A primary query type that also processes plain English queries, but tolerates spelling differences in either the body of the text or the queries; automatically does pattern expansion on all query words; ranks returned documents for relevance.

- Search is **narrowed** by:
  - setting a lower number of pattern expansion words
  - including an exact phrase in double quotes

- Search is **widened** by:
  - setting a higher number of pattern expansion words
  - using document metadata fields as filters (that are OR'd with the search words)
  - using a special operator to designate a specific query word for semantic expansion (!)

- Search process is typically slower than Boolean searches, since ranking and pattern expansion are performed; however, recall and precision are higher, making response evaluation faster and easier
- Most effective when:

  - you have "dirty" OCR data
  - you're looking for a word that is a proper noun with variant spellings
  - you're looking for a specific term or phrase, but you're not sure of the spelling

Boolean search

A primary query type that uses traditional Boolean operators to find exact matches for *all* query words you enter; no ranking of responses; no automatic expansion.

- Search is narrowed by:
  - using an exact phrase in double quotes
  - using certain Boolean operators (AND, NOT, WITHIN, ADJ, BETWEEN, and nested statements)
- Search is **widened** by:
  - using an OR operator
  - using a special operator to designate a specific query word for semantic (!), pattern (~), or wildcard (*, ?, *[search expression*], _, @, #, ^) expansion
- Query entry is more difficult and time-consuming than plain English queries, since Boolean operators and correct syntax are required Search process is almost instantaneous since no ranking and no automatic expansion are performed; however, it may take you longer to sift through a large response since the most relevant documents can appear anywhere on the list.
- Most effective when:
  - you’re looking for a proper noun only
  - you’re searching for words (such as a title) or a document you’ve seen before

Wildcard search

A query that substitutes part of a word, name, or number with a wildcard character (*, ?, *[search expression*], _, @, \, #, ^) to substitute for unknowns in the search terms or database, or to search for multiple terms. Wild cards can be used in Concept or Boolean mode (not Pattern), in full text search or field entries, in multiple words, and even multiple times in one word.

- Search is **narrowed** by:
  - setting a lower number of wildcard words to use in the wildcard expansion
  - Search is **widened** by setting a higher number of wildcard words to use

- Query entry is as easy as for the primary search type (Concept, Pattern, or Boolean)
- Search time is generally faster because no semantic expansion is performed on wildcard words; however, if wild cards are used too broadly (such as co*), or if you set the number of wildcard words very high, the search time can be long and the response too large to be useful.
- Most effective when you are:
  - searching for a proper name that you can't remember how to spell
  - searching for multiple terms that have several similar characters (such as model "C1050," "C1051," and "C1052")
  - not sure what form a particular word takes in the database, and want to make sure that all forms of it are found

Wildcard	Description	Example
@	match exactly one alpha character	c@re
#	match exactly one numeric character	#600
\	take the next character literally; not as an operator. This operator works only if the character following it has been indexed for searches.	john\@hotmail.com
*	match any character(s) (including nothing)	pharma*
-	match zero or one character	cho-se
?	match exactly one character	la?er
[]	search expression; can include a hyphen to indicate a range of letters or numbers; will match only one character within the brackets	A[1-5]
[^]	match any character *except* the next character	199[^1-3]

Grouped term search

A query (Concept or Pattern) in which terms related to a common concept are grouped together with parentheses in order to improve search accuracy. The words within the parentheses are expanded, matched, and ranked for relevance as a group, instead of as individual words.

- Options for narrowing or widening the search are the same as for whatever query
- mode you are using

- Query entry is as easy as for the primary search type (Concept, Pattern, or Boolean)
- Response time will be the same as for whatever primary query type you are using
- Most effective when:

  - you're searching for multiple related terms that are not in the dictionary (for example, `(JFK “John Kennedy” Kennedy) election`)
  - you're searching for multiple terms that aren't linked to one another in the dictionary (for example, `(motorcycle boat RV) trade shows`).

Concept expansion in Pattern or Boolean mode

To expand individual words via the semantic network when you're not in Concept mode, enter a semantic operator (!) following the word. That word will be expanded to query terms with related meanings, up to the expansion level you set in the Query page. For example, if you were to enter `child! psychology` in Boolean mode, the word "child" might expand to "youngster," "kid," and "children," and the word "psychology" would not be expanded.

Pattern matching in Concept or Boolean mode

To expand individual words to matching patterns when you're not in Pattern mode, enter a pattern operator (~) preceding the word. That word will be expanded to similarly spelled words in the library, up to the number of pattern match words you set in the Query page. For example, in Concept mode, if you weren't sure how to spell "psychology" you might enter `child ~psychology` to concept expand "child" and still pick up the word "psychology," even though you didn't spell it correctly.

Boolean words in Concept or Pattern mode (exact phrase search)

To keep specific query words from being expanded when you're not in Boolean mode, enter double quotes (“ ”) around the terms. The words in double quotes are not expanded, and multiple words in quotes must be found in the order they were entered. This can be useful when you're looking for a specific name or phrase. For example, if you were to enter `“child psychology”` magazine in Concept mode, the phrase `“children's psychology”` wouldn't match, because "child" wouldn't expand to "children." Likewise, `“psychology of a child”` wouldn't match, even though the stop words "of" and "a" are ignored, because the terms `“child”` and `“psychology”` are out of order. To simply prevent the expansion of multiple words—without the word order constraint—enclose each word in separate quotes (enter "`Justice`" "`Department`" cases to find both "`Justice Department`" and "`Department of Justice`"). You can also use double quotes around phrases in Boolean mode, as a way to restrict the order of words you find. For example, "child psychology" would match "`psychology of a child`" but "`child psychology`" would not because of the word order constraint.

General query guidelines

Because no two systems or language-specific dictionaries are exactly alike, there are no hard and fast rules for entering queries and adjusting query options. The following general guidelines may be useful until you become more familiar with the search engine's capabilities: If your query is simple, use a Basic Search or Concept mode in an Advanced Search with the "narrow" search style (word expansion set to level 2). About 50% of the time, a simple search such as this will return the results you need quickly and easily, especially if you're familiar with the database. If you're not familiar with the database, set expansion higher (level 4 or 5) to make sure you don't miss relevant documents.

- Word Expansion Level: Set at level 3 or lower
- To increase recall:

  set word expansion higher

- To increase precision:
  - choose pattern or wildcard expansions
  - use more search terms, and make them specific
- To increase query speed on until you become familiar with the document collection:
  - set word expansion lower
  - shorten the query
- To increase query speed after you are familiar with the document collection:
  - use document metadata fields
  - use exact phrases

Search Engine Terms

The following list provides a definition of the terms:

Term	Definition
Antonym	A word that means the opposite of a given word; antonyms of query words will be included in a Concept search when the word expansion level is set to 6 or higher.
Boolean mode	A query mode in which exact query terms are matched against the documents in the library (or against incoming documents, in the case of real time profiles); documents are not ranked for relevance; Boolean operators (AND, OR, NOT, WITHIN, ADJ, BETWEEN) can be used to control matching; special operators used with individual query terms enable concept (!), pattern (~), or wildcard (*, ?,[*search expression*], _, @, #, ^) expansion.
Coarse grain ranking	A query process during which documents in the library are retrieved and ranked for relevance according to how many query words are present, how many supporting (related) words are present, and the semantic distance (relationship) between the two; applies to Concept and Pattern modes, but not Boolean.
Concept expansion	A query process that adds related terms to the original query word list; in Concept mode, all query words are concept expanded; in Pattern and Boolean modes, you can concept expand an individual word by entering an exclamation point (!) after it.
Concept mode	A query mode in which search terms are expanded to related terms via the semantic network, then matched against the documents in the library (or against incoming documents, in the case of real time profiles); each document has a rank indicating its probable relevance to your query; special operators used with individual query terms enable pattern (~) or wildcard (*, ?, [*search expression*], _, @, #, ^) expansion, or disable expansion (" ").
Database	A collection of documents and structured fields against which your searches are performed. The documents are organized into a library named KMLib, and are integrated with a relational database. For purposes of this manual, the term "database" is synonymous with the term "library."

Term	Definition
Dictionary	A list of meanings, where each meaning contains syntactic information and a group of words that share that meaning.
Document Metadata or Field	Document heading or other information (like title, author, date, document type, etc.) that may be queried on separately from the body of the document.
Document rank threshold	A parameter set for real time profile queries that determines the minimum rank incoming documents must have in order to be considered a match of the query; applies to Concept and Pattern modes, but not Boolean.
Exact phrase search	A specialized query in which you can search for specific words or phrases you know exist in the library. Words enclosed in double quotes (" ") are not concept or pattern expanded, and must occur in the same order and proximity to be considered a hit. An exact phrase search can be used in any query mode (Concept, Pattern, or Boolean).
Expert	A person with specialized knowledge of a subject area that you associate with a category or categories.
Field or Document Metadata	Document heading or other information (like title, author, date, document type, etc.) that may be queried on separately from the body of the document.
Fielded search	A specialized query in which you can limit the scope of the search by entering search terms in fields (author, title, date, etc.) The system administrator must set up and index fields for each library before this type of query can be performed and determine whether each field will be a statistical or Boolean filter.
Fine grain ranking	A query process during which retrieved documents are assigned a final rank based on the coarse rank, along with hit proximity (how close hit words are to one another) and density (how many of the total number of words are hits). Fine grain ranking applies to Concept and Pattern modes, but not Boolean.
Fuzzy spelling	See “Pattern expansion”.
Grouped term search	A specialized query in which terms related to a common concept are grouped together with parentheses in order to improve search accuracy. The words within the parentheses are expanded, matched, and ranked for relevance as a group, instead of as individual words. This search applies to Concept and Pattern modes, but not Boolean.

Term	Definition
Hit	The words or phrases in a returned document that were matched to your search terms by the search engine program; the user can choose how hits are differentiated from non-matching text (color coding, italics, bold, etc.).
Idiom processing	A task performed by the The search engine program to identify phrases with meanings beyond their individual words (such as "real estate," "United States," and "ice cream").
Index	A file that stores information about all the words in the document library, including positional information about the words in each document; used by the search engine program during retrieval and ranking of documents.
Inflected form	A variation of a word to reflect a distinction such as case, gender, number, tense, person, mood, or voice; inflected forms (such as "caught" is to "catch," or "mouse" is to "mice") will be included in a Concept search when the word expansion level is set to list name of second level or higher.
Library	A collection of documents and fields which can be indexed and searched by the search engine; your library is named KMLib.
Morphological analysis	A process that removes word suffixes and changes spellings to reduce words to simpler forms found in the dictionary (such as "babies" to "baby," or "highest" to "high"); morphological variants of query terms are always included in any search (including Boolean and exact phrase searches).
Nested statements	A way of structuring Boolean queries that groups words or phrases within parentheses, for purposes of specifying conditions to narrow the search.
Pattern expansion	A query process that adds similarly spelled terms to the original query word list; in Pattern mode, all query words are pattern expanded; in Concept and Boolean modes, you can pattern expand an individual word by entering a tilde (~) in front of it; also called "fuzzy spelling."
Pattern mode or Search for Spelling Variants	A query mode in which search terms are expanded to words that are spelled similarly, then matched against the documents in the library; each document has a rank indicating its probable relevance to your query; special operators used with individual query terms enable concept (!) or wildcard (*, ?, [*search expression*], _, @, #, ^) expansion, or disable expansion (" ").

Term	Definition
Power Search	A type of query that allows you to narrow the search and increase precision by specifying which expansion words are added to your query, and by weighting certain query words higher than others. For concept expansions, you can choose certain meanings for expansion; for pattern and wildcard expansions, you can choose which word matches from the database to use for the query; can be used in any query mode (Concept, Pattern, or Boolean).
Precision	A measure of the text retrieval system's ability to return only relevant documents.
Query	The words or phrases you enter for a search, along with the various settings you choose, such as query mode and expansion level.
Query filter	The function performed by a field or group of Document Metadata fields when they are used to limit the results of a search to only those documents containing the fielded information, like summary and title.
Ranking	A process performed by the query program to rate retrieved documents in order of their probable relevance to the query; applies to Concept and Pattern mode but not Boolean.
Recall	A measure of the text retrieval system's ability to return all relevant Documents.
Related word	A word that is similar in meaning to a given word, but not strongly enough to be considered a synonym; related words will be included in a Concept search when the word expansion level is set to 5 (Weakly related concepts).
Relational database (RBDMS)	A set of data organized into tables, with rules governing the relationships between the columns, rows, and tables of data; the search engine provides full text searches of document metadata such as title and summary which are stored in the RDBMS.
Search for Spelling Variants or Pattern Mode	A query mode in which search terms are expanded to words that are spelled similarly, then matched against the documents in the library; each document has a rank indicating its probable relevance to your query; special operators used with individual query terms enable concept (!) or wildcard (*, ?, [*search expression*], _, @, #, ^) expansion, or disable expansion (“ ”).
Semantic distance	A measure of how closely two terms are related to one another.

Term	Definition
Semantic link	Connections between words or concepts in the semantic network; used by the search engine to find words and concepts related to your original search terms.
Semantic network	A structure that links together related dictionary terms and concepts; each concept or word sense is a node that is linked to other nodes through word relationships (synonym, antonym, etc.).
Stemming	A less sophisticated form of morphological analysis that reduces words to their root forms.
Stop words	A list of "small function" words and idioms that are not indexed and are automatically removed from queries prior to processing.
Synonym	A word that has the same meaning as a given word; synonyms will be included in a Concept search if the word expansion level is set to 3 (Most strongly related concepts).
Tokenize	A query process that divides a string of characters into words; it may include special processing for dates, phone numbers, and hyphens.
Weight	An option you can use on Advanced searches that tells the system the relative importance of each query word; applies to Concept and Pattern modes but not Boolean.
Wildcard expansion	A query process that adds terms matching a certain search pattern to the original query term list; in Concept and Boolean modes (not used in Pattern mode), you can wildcard expand an individual term by replacing part of the term's letters, numbers, or punctuation with one or more wildcard operators (*, ?, [*search expression*], _, @, #, ^); typically used to substitute for unknowns in the search terms or database.
Word expansion level	A query property that determines what level of related terms from the semantic network are used during a Concept search.

Glossary

PEREGRINE

This glossary contains general terms used when describing Get-Answers, OAA platform, and Workflow.

Term	Definition
Activity	A task or set of tasks that forms one logical step within the process definition. An activity can be a *manual activity* or an *automated activity*.
Activity instance	A single instance of an activity within a process instance. A process instance can include multiple activity instances. An activity that has been started is an activity instance.
Adapter	Provides a connection between the back-end database and the Web application, allowing data to pass back and forth from the database to the Web browser.
AND-Join	A point within the workflow where two or more parallel activities are joined and the next logical activity is executed (see Parallel routing).
AND-Split	A point within the workflow where a sequential route splits so that two or more parallel activities are formed for independent, simultaneous processing (see Parallel routing). An AND-Join is used to join the parallel activities when their processing is complete.
Application server	Processes data from a Web application database and delivers it to the Web server.
Archway	A Java servlet that listens to HTTP requests from clients and foreign servers, routes the requests to an appropriate server, and returns data or displayable documents. The requests supported by Archway can vary, but they fundamentally consist of queries, data updates, and system events. Archway processes HTTP requests and formats them into messages understood by the Get-Answers processing layer. The resulting messages are ultimately dispatched to a data store adapter which produces an XML formatted result set.

<table>
<tr><th>Term</th><th>Definition</th></tr>
<tr><td>Authoring</td><td>Authoring is the ability to create new documents and edit the content using an RTF or plain text editor.</td></tr>
<tr><td>Audit data</td><td>An historical record of the progress of process instances and activity instances.
Get-Answers collects the following information for process instances and activity instances:
<table>
<tr><th>Process Instance</th><th>Activity Instance</th></tr>
<tr><td>Dated Started</td><td>Date Assigned</td></tr>
<tr><td>Date Ended</td><td>Date Due</td></tr>
<tr><td></td><td>Date Ended</td></tr>
</table></td></tr>
<tr><td>Automated activity</td><td>An activity that is performed by a computer, without user intervention.</td></tr>
<tr><td>Business process</td><td>A set of linked activities that complete a business objective. A business process is defined in a process definition that can include both automated and manual activities.</td></tr>
<tr><td>Capabilities</td><td>Capabilities are the tasks that Members, Submitters, Readers, Reviewers, Editors, and Owners can perform. There are seven capabilities including read, create, update, revert, retire, publish, and transfer.</td></tr>
<tr><td>Deadline</td><td>A time-based scheduling constraint where the work item for an activity must be completed by a specified time.</td></tr>
<tr><td>Categories</td><td>Categories contain published documents. Each category is managed by one Ownership Team.</td></tr>
<tr><td>ECMAScript</td><td>Server-side scripting language. Used to write scripts for Get-Answers.</td></tr>
<tr><td>Editor</td><td>Editor is one of the four Document Ownership Team permissions. An editor has read, create, and update capabilities for any document owned by the Ownership Team. An Editor also has special responsibilities in the editorial workflow.</td></tr>
<tr><td>Editorial workflow</td><td>The Get-Answers Editorial Workflow is used to edit and review an unpublished (working copy) document and its metadata.</td></tr>
<tr><td>Escalation</td><td>A procedure that is invoked when a specific constraint or condition is not met. An escalation can be automated or manual and generally involves a higher level of authority (see Organizational Role).</td></tr>
<tr><td>Event</td><td>An occurrence that causes the workflow management software to take one or more actions. An event notifies the workflow engine of an internal or external action.</td></tr>
<tr><td>External document</td><td>A document created outside of Get-Answers. Examples include MS Office documents, PDF documents, and HTML documents.</td></tr>
</table>

Term	Definition
HTML	**H**yper**t**ext **M**arkup **L**anguage. A language used to compose Web pages, which can be read and displayed by a Web browser.
HTTP	**H**yper**t**ext **T**ransfer **P**rotocol. The communications protocol used to connect to Web servers. Sends HTML pages to the Web browser to be read and displayed. HTTPS can be used to provide extra data level security.
Iteration	A repetitive execution of one or more activities until a specified condition is met.
JAAS	**J**ava **A**uthentication and **A**uthorization **S**ervice: JAAS is used by Get-Answers to authenticate users. The set of services against which a user must be authenticated can be configured, and each service can be defined as REQUIRED, OPTIONAL, REQUISITE, or SUFFICIENT through login modules.
Java Run-Time Environment	A JRE is required to run Java programs. It consists of the Java Virtual Machine, the Java platform core classes, and supporting files.
JSP	**J**ava **S**erver **P**age. Allows separation of page content from the design and display of a page. HTML tags with embedded Java source code are executed by the Web or application server. JSP technology is an extension of Java servlet technology.
Manual activity	An activity that requires user resources for performance of the required tasks associated with the activity.
Member	Member is one of the two category permissions. A member has read access to any document published in the category.
Metadata	Metadata consists of information stored about each document, such as file name, title, file size, document type, version number, creation date, and editorial status.
OAA Platform	The software platform that the Peregrine Get-It products use. These products are Get-Answers, Get-Resources, and Get-Services. This platform provides features and functionality common to the Get-It employee self-service products. The OAA Platform is a software product included with any or all of the Get-It products and is not sold without them.
OR-Join	A point within the workflow where two or more alternative activity branches are joined into a single activity.
OR-Split	A point within the workflow where a sequential route splits based on a decision upon which branch to take. An OR-Split is conditional and the branch to the next activity is determined by the value returned.

Term	Definition
Organizational Role	A group of workflow participants having a specific set of attributes, qualifications, and skills. The participants within the group can perform work items that require a participant who has that set of attributes.
Owner	Owner is one of the four Document Ownership Team permissions. An owner has read, create, update, revert, retire, publish, and transfer capabilities for any document owned by the Ownership Team. An Owner also has special responsibilities in the editorial and triage workflows.
Ownership teams	Ownership Teams manage documents. There are four permissions associated with an Ownership Team. They include Reader, Editor, Owner, and Reviewer.
Parallel routing	A segment of a process instance where two or more activity instances execute in parallel. Parallel routing normally is created with an AND-Split and concludes with an AND-Join.
Peregrine Portal	The first screen displayed when starting a Peregrine Web application. Provides a login screen and access to the modules that make up the application.
Process	A set of process activities designed within the process definition according to the requirements of a business process.
Process definition	A process definition represents a business process and consists of activities where the process tasks are defined. A process definition includes information about the activities and workflow users. Both manual activities and automated activities can be included in the process definition.
Process instance	A single instance of a process as defined by the process definition. A process that has been started is a process instance.
Process role	A mechanism that associates workflow participants with workflow activities. The role defines how the user participates in a specific process or activity.
Process state	A representation of the status of a process instance. The Get-Answers workflow uses the following process states: **Running**—the process instance is running and one or more activities have started. **Completed**—the process instance has successfully completed all activities. **Error**—the process instance has encountered an error and stopped.
Reader	Reader is one of the four Document Ownership Team permissions. A reader has read access to any document owned by the team. Readers play no role in the editorial or triage workflows.

Term	Definition
Reviewer	Reviewer is one of the four Document Ownership Team permissions. A reviewer can read any document owned by the Ownership Team. A Reviewer also has special responsibilities in the editorial workflow.
Roles	Roles consist of a group of users. Permissions are given to roles and/or individual users.
Sequential routing	A segment of a process instance where several activity instances are executed in sequence.
Servlet	A platform-independent Java application component that is used by the system as needed to perform server-side processing (for example, to access a database).
subcategory	Sub-categories are sections within categories.
Submitter	Submitter is one of the two category permissions. A submitter has read access to any document published in the category, and can contribute new documents to the category.
Triage workflow	The Get-Answers Triage Workflow is used to examine newly submitted documents that have never been published before, in order to determine if the document should be further reviewed in an Editorial Workflow, published immediately, transferred to a different Document Team, or deleted.
Web application	An application that is displayed in a Web browser.
Web server	Reads data directly from a Web application or from the application server and converts it to a form that can be displayed by a Web browser.
Work item	The work to be processed by a workflow user, as defined in the associated activity. Work items for a user or group of users are accessed through the worklist.
Workflow	The automation of a business process where tasks are passed from one user to another, as defined by the process definition. Get-Answers workflow consists of the lifecycle stages of each document. Up to three copies of a document can exist at any time. They include the published copy, the working copy, and the copy currently under revision.
Workflow engine	A software service or "engine" that provides the run time execution environment for a process instance. The workflow engine interprets the process definition, creates process instances and manages their execution, and navigates activities and creates work items for their processing.
Workflow participant	A user that performs the work items assigned through the worklist. Each work item is represented by a workflow activity.

Term	Definition
Working copy	Working Copy is a version of the published document in an editorial status.
Worklist	A list of work items associated with a specific user or group of users.
XML	E**x**tensible **M**arkup **L**anguage: A documentation meta-language that allows you to author self-describing data documents, which can then be formatted with a style sheet for display in a Web browser or exchanged with foreign systems. Unlike HTML, you create your own XML tags and define their meaning to suit the application.

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