

Peregrine

Get-Answers 4.1.2

User's Guide

For Windows, AIX, or Solaris

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Peregrine Systems, Inc.
3611 Valley Centre Drive San Diego, CA 92130
Tel 800.638.5231 or 858.481.5000
Fax 858.481.1751
www.peregrine.com



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Introducing Get-Answers

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 8.
- *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 25.

Chapter 3, *Creating Documents in Get-Answers* on page 37.

Appendix A, *Search Queries* on page 59

Typographical conventions

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

Convention	Meaning
Sans serif	Information that you must type exactly as shown, code examples, output, and system messages appear in a sans serif font.
Bold	Button names, field names, menu names, and menu options appear in bold.
<i>Italics</i>	Variables and values that you must provide appear in <i>italics</i> . New terms also appear in <i>italics</i> .

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

Element	Usage
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:

- *Get-Answers Release Notes* provides information about new features, corrected issues, and known issues. This is provided as a hard copy.
- *Get-Answers Installation Guide* provides information about installing Get-Answers and the Peregrine® Open Application Architecture (OAA) platform, the Get-Answers Search Engine, setting up your webserver and application servers, creating the Get-Answers database, and populating that database with sample data. This is provided as a hard copy.
- *Get-Answers Administration Guide* which provides information about controlling access to document collections and customizing Get-Answers.
- *Notification Services Quick Start Guide* and online help which 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 other Peregrine applications to enable users to send and receive notifications.

Contacting customer support

For help with this release, you can contact customer support, download documentation or schedule training.

Customer Support

For further information and assistance with Product Name Short in general, 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 of the Peregrine Customer Support web site.

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 via 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 Finding Information in Get-Answers

CHAPTER

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* on page 16
- *Advanced search options* on page 17
- *Performing an advanced search* on page 20
- *Browsing categories* on page 21
- *Submitting comments on a document* on page 22
- *Opening tickets in Get-Answers* on page 23

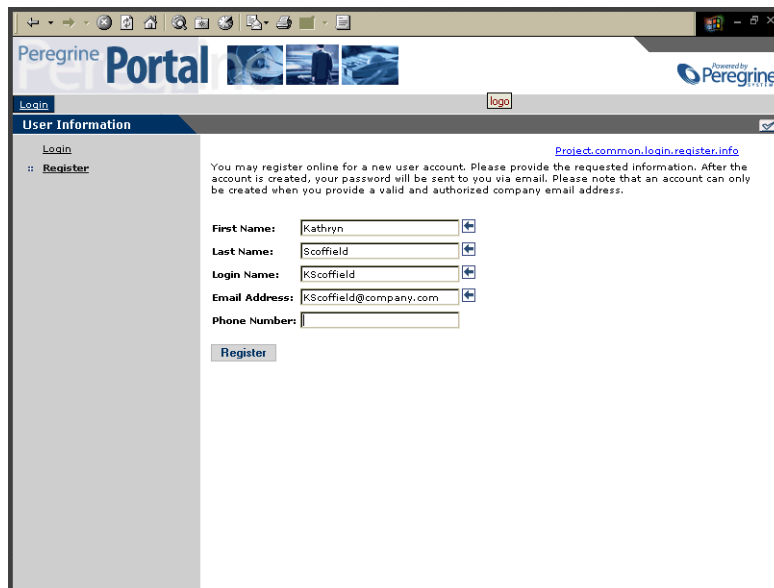
Note: The Glossary provides explanation of search terms, and the Appendix provides more details on basic and advanced search techniques.

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



The screenshot shows a web browser window displaying the 'Peregrine Portal' login and registration interface. The page title is 'Peregrine Portal' and it is powered by 'Peregrine'. The main content area is titled 'User Information' and contains a 'Register' link. Below the link, there is a registration form with the following fields: 'First Name' (Kathryn), 'Last Name' (Scofield), 'Login Name' (KScofield), 'Email Address' (KScofield@company.com), and 'Phone Number'. Each of the first four fields has a small arrow icon to its right, indicating they are required. A 'Register' button is located below the form. A message above the form states: '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.' A link for 'Protect common login/register info' is also visible.

- 3 Click **Register**.

A message appears indicating that you have been registered as a new user. A password will be e-mailed to you. See the section, *Changing Your Password* on page 103 for instructions for changing your password.

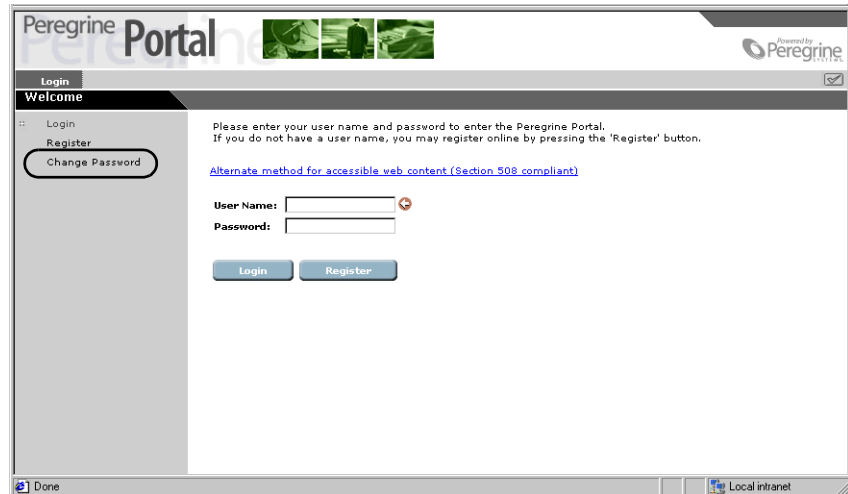
- 4 Click **Login** to access the login screen.

Changing Your Password

You can easily change your password from the Login screen Activity menu.

To change your password:

- 1 On the login screen Activity menu, click Change Password.



- On the form displayed, type your user login name and current password. Type the new password you want to use, and then repeat it in the second field for verification.

The screenshot shows the 'Change Password' form in the Peregrine Portal. The form is titled 'Change Password' and includes a navigation menu on the left with options for 'Login', 'Register', and 'Change Password'. The main content area contains the following text: 'Please enter your existing user name and password followed by a new password.' Below this text are four input fields: 'User Name' (containing 'jsmith'), 'Current Password' (containing asterisks), 'New Password' (containing asterisks), and 'Repeat New Password' (containing asterisks). There are two buttons at the bottom: 'Change Password' and 'Go Back'. The page header shows 'Peregrine Portal' and 'User: Admin'. The browser status bar at the bottom shows 'Done' and 'Local intranet'.

- Click **Change Password**.

The Peregrine Portal appears with a message that your password has been changed.

Performing a basic search

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 17 for more details about the search options available.

To perform a basic search:

- 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.

Enter your question:

Search Advanced Search

A list of documents matching your search request appears.

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

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 20.

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 Query field on the Advanced Search Query field. 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 18. For information on context-based queries, see *Submitting comments on a document* on page 22.

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 ungrouped 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.

Enter your question:

Search Type

Natural Language Search: **Concept Expansion:**
 Search for Spelling Variants: **Language:**
 Use Boolean Operators:

Document Metadata

Title:
 Summary:
 Type:
 Editorial Status:

Scope of Search

Subcategory:

Creation Date

Search by creation date:

Later Than:
 Earlier Than:

Expiration Date

Search by expiration date:

Later Than:
 Earlier Than:

- 3 In the Enter your question field, type words for your search.
- 4 In the Search Type field, make 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 Type field, enter the document's type.
 - In the Editorial Status list, choose either **Published Documents** or **Works in Progress**.
- 6 In the Scope of Search section, choose a category from the list.
 - 7 In the Creation Date section, click the **Search by creation date** check box, and then choose a date from the Earlier Than or Later Than fields.
 - 8 In the Expiration Date section, click the **Search by expiration date** check box, and then choose a date from the Later Than or Earlier Than fields.
 - 9 Scroll to the top of the page and click the **Search** button.
- Your results appear in the page that opens.

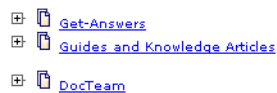
Browsing categories

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.

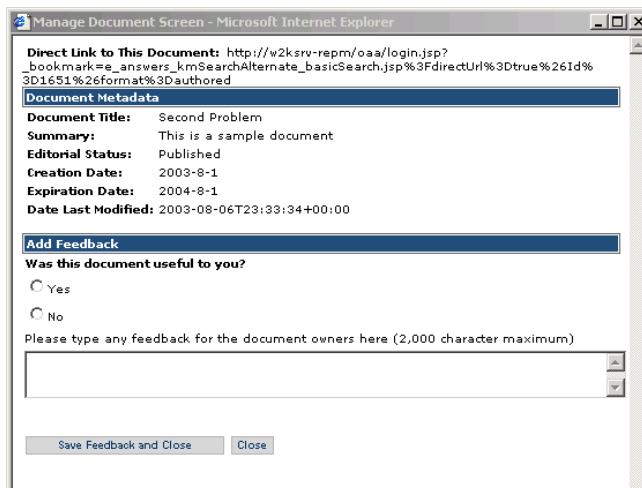
The Browse Categories page opens.



- 3 Select the desired main category and then the subcategory within it.
- 4 Select one of the documents and double click to to open it.
A summary of the document appears in the bottom section of the Browse Categories page.
- 5 Click the **Title** link to open the document in a document view window.

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

The Manage Document Screen window opens.



In this window, you can view the document's details such as status, creation date, expiration date, and date last modified. You can also add feedback to the document.

Submitting comments on a document

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

To submit comments on a document:

- From the Get-Answers home page, click the **Get-Answers** tab.
- In Get-Answers, click **Search** in the menu options or browse to the document if you know the document's categories and subcategories.
- Click the **Title** link to open the document in a document view window.
- Click the **Actions** button to open the document in the Manage Document Screen window.

The Manage Document Screen window opens.

- Answer the question asking if the document was useful to you.
- In the text box, enter your comments for improving the document.

- 7 Click **Save Feedback and Close** to submit the comments.

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 Working with Documents

CHAPTER

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 through 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 26
- *Links* on page 26
- *Managing your documents* on page 26
- *Submitting an external document for publication* on page 29
- *Working with document reports* on page 31

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.
- 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 on the file server
- A copy currently under revision (actively being edited) on the owner's client or workstation

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 member 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** A Get-Answers team member 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's ownership team 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 a Member of a document's Ownership Team downloads the working copy during a workflow, the team member revises the document on his workstation. When the Member finishes making changes to the document, the revised copy is uploaded during the workflow to replace the published copy.
- Step 6** The published copy is updated with the working copy and the working copy is deleted.
- 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 deleted and the document is no longer accessible to the system.

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 Manage Document window.

To use the Manage Document function to review comments and modify, transfer, or retire a document:

- 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 document by opening the folders for the appropriate category and subcategories.
- 4 Click the subcategory link.
A list of documents opens for the subcategory.
- 5 Click the **Actions** link for the document to review the comments for the document.

The Manage Document window opens.

Review feedback

Buttons used to manage documents.

Direct Link to This Document: http://w2ksrv-repm/oa/login.jsp?_bookmark=e_answers_kmSearchAlternate_basicSearch.jsp%3FdirectUrl%3Dtrue%26Id%3D2122%26format%3D

Document Metadata

Document Title: Sample: Reviewing Comments
Summary: This is a sample document to document how document feedback.
Editorial Status: Published
Creation Date: 2003-8-11
Expiration Date: 2004-8-11
Date Last Modified: 2003-08-11T22:47:36+00:00

Review Feedback	Date	User Name	Delete this Comment
This is a review comment.	2003-8-11	Owner, Otto	Delete: <input type="checkbox"/> Delete

Add Feedback

Was this document useful to you?

Yes
 No

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

Save Feedback and Close Modify Transfer Retire Close

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

- Review the comments and then save them or delete them.
- 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 selected team.
- 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).

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 38.

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.

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

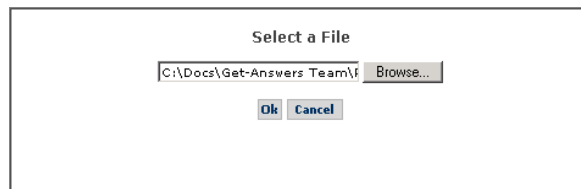
- 3 Click **External** to upload a document created outside of Get-Answers.

The Create New Document page opens.

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

- 4 In the Title field, type a name for the new document.
- 5 In the Summary field, enter a description of the document's purpose.
- 6 Use the Language drop-down list to select the document's language.
- 7 From the Document Ownership Team list, select the document ownership team for this document.
- 8 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.



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.

- 9 Click **Browse** to browse to the location of the file you are submitting.
- 10 Click **OK** to load the document.
- 11 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 45.

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.

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 system 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.
A search page opens.
- 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.

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

The Document Details page opens and displays the document details.

Document Title: Sample Document 2
Author: user, super
Published: Working Copy
Document Team: Get-Answers Team
Score:
Creation Date: 7/9/03
Expiration Date: 7/9/04

[Return To List](#)

To view document feedback:

- 1 Click the Document Feedback link.

The search page opens.

Please enter the search criteria and press the Search button.

Document Title:  

Date:  

Feedback:

[Search](#) [View All](#)

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

- 3 Click Search.

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 **Document Usage** 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.
- 4 In the Search Results page, click a document's link to see the information.
The Usage History Details page opens and displays the usage history of the document.

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.
- 4 In the Search Results page, click a document's link to see the information.
The Search History Details page opens and displays the search history of the document.

To view document team activity:

- 1 Click the **Document Team Activity Search** link.
The Search page opens.
- 2 In the Search page, use the fields to enter the search parameters for the document team.
- 3 Click **Search** or **View All**.
The Search Results page opens.
- 4 In the Search Results page, click a document's link to see the information.
The "Team Name" Activity Details page opens and displays the document title, document team, action, and date.

3 Creating Documents in Get-Answers

CHAPTER

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 you use 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 38.
- *Using the edit-on Pro Editor* on page 41.

Warning: The Authoring applet causes Netscape 6.2 and 6.2.1 browsers to fail with a General Protection Fault. All other Get-Answers features work properly. This possibility is noted in the Get-Answers User Guide. All Document Ownership Team Owners and Editors need to use Internet Explorer browsers until the next release of Get-Answers.

If, after starting the application server, you access the system by addressing the web server as “localhost” (e.g., <http://localhost/oa/login.jsp>), you will encounter licensing problems when attempting to access the Authoring applet. When logging into the application server, use the server name (e.g. <http://<servername>/oa/login.jsp>).

Creating a document

You can create documents within Get-Answers using the Contribute New Document menu option. You can only add documents using this feature that you create using the edit-on Pro editor and its associated functions.

To create a new document:

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

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

Please click on any item to view it in detail.

Name	Description
Problem/Solution	Description of a solution for a problem.
External	A document created outside of Get-Answers. Examples are MS Office Document
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
Test Case	This is sample document type for QA

- 2 Select a document type from the list. For example, Problem/Solution

Note: You cannot create an external document, but you can **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

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

The screenshot displays a web-based form for creating a document. At the top, there is an 'Entry Form' section with the following fields: 'Title' (text input), 'Summary' (text area), 'Document Type' (dropdown menu set to 'Problem/Solution'), 'Document Ownership Team' (dropdown menu set to 'Get-Answers Team'), and 'Expiration Date' (calendar icon and date input set to 'Jul 9 2004'). Below this is a 'Problem' section with an 'Add Content Choices' toolbar containing buttons for 'Link to Other Doc', 'Weblink', 'New Upload', 'Image', and 'Shared Content'. The main editing area for the problem is a WYSIWYG editor with a toolbar and a text area. A similar 'Solution' section follows, also with an 'Add Content Choices' toolbar and a WYSIWYG editor. At the bottom of the form, there are three buttons: 'Submit Document', 'Preview Document', and 'Go Back'.

- 3 Enter the title for document you are creating. This is required.
- 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, 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 41 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 document.

- 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 image or embedded in the document. A shared image is usually used by more than one document view.

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, a 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.

Sample Document 2		Peregrine Get-Answers
Summary : sample	Document Id :	
Author :	Creation Date :	
Document Type :	Expiration Date : 2004-7-9	
Problem : This is a sample.		
Solution : This is a sample.		
<input type="button" value="Close"/>		

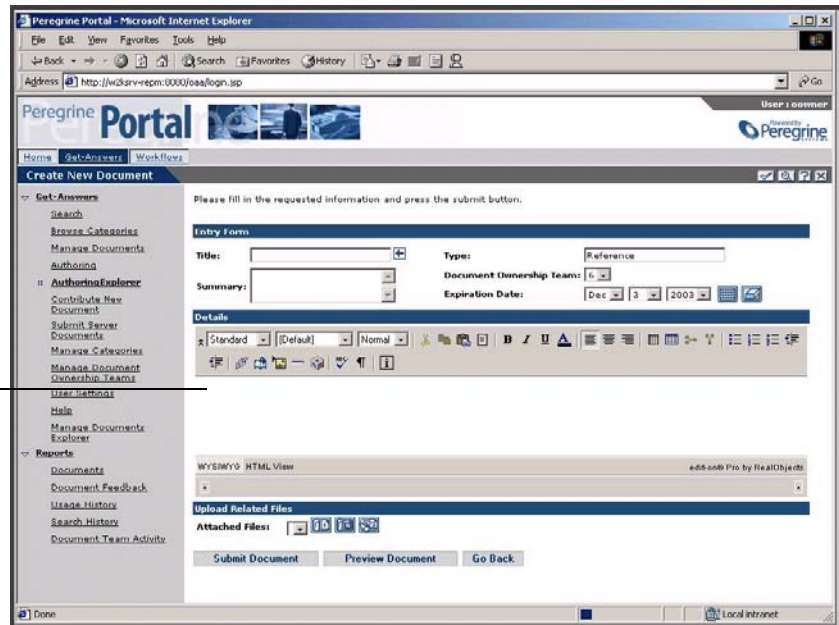
- 8 Click **Close** to close the Preview window and return to the Create New Document page.
- 9 Click **Submit Document** to add the new document to the file server and to Workflow.

The document has also been sent to the Triage Workflow for review and potential publication. For information on using Workflow, see [Chapter 4, Using the Worklist](#).

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 a knowledge of HTML or XML.

Section for creating and editing document content with edit-on Pro editor

























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 HTML code and is intended for expert users only with a strong knowledge of HTML.

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  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.
	Bold, italic, or underline the selected text.
	Make the selected text a subscript or superscript.
	Opens the style property window, which allows you to create or modify a style.
	Aligns the selected text: left, center, right, justified.
	Inserts a table.
	Inserts a table using the table wizard.
	Inserts a default table.
	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 ¶.
	Performs a spelling check of the document.
	When clicked, a new window opens to display the help file.
	Inserts a horizontal line at the position of the cursor.
	When clicked, a dialog opens with version and copyright information.

When you are entering a list item (number or bullet) or indenting a paragraph, you should first use the Shift+Enter key to insert a `
` in the html code.

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 + 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 <code>
</code> tag (available in WYSIWYG view only).

4 Using the Worklist

CHAPTER

When a document is submitted, 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 45
- *Accessing the worklist* on page 47.
- *Completing worklist items* on page 48.
- *Reassigning a work item* on page 53.
- *Viewing history* on page 55.
- *Viewing status* on page 55.
- *Delegating your worklist to another user* on page 57.

Worklists and roles

All documents submitted to Get-Answers go through a workflow, which determines how the documents are processed 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 role you have on the team or teams you belong to. Worklists contain the messages sent by the system to notify you of the tasks you have been assigned for documents submitted to Get-Answers. A Triage and Editorial workflows include the following roles and actions:

- Triage workflow

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 or its metadata. Editors can also view, add, and delete comments on 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 in the system.

To access your worklist:

- 1 Log on to Get-Answers to display the Navigation Menu on your Home page.
- 2 Click **Workflows** to display the My messages page.



- 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, depending upon the status of the processing for the item you selected.

Description of task processing.

Detail	History	Status
General Information		
To:	Owner	
Subject:	Using Problem/Solution	
Sent:	8/18/03 11:00 AM	
Due:	8/19/03 11:00 AM	
Detailed Description		
A document has been submitted to your team for review. Please decide what should be done with the document next. Title: Using Problem/Solution; Status: New document; Submitted by: Otto Owner; Document Ownership Team: Peregrine Get-Answers.		
Associated Business Object		
Description:	Using Problem/Solution; Peregrine Get-Answers; Triage Workflow	
<input type="button" value="Accept Group Assignment"/>		

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 (sorting documents) and Editorial work items (or documents). The Triage workflow is used by Owners to examine newly submitted documents that have never been published before. The Editorial workflow is used by Editors and Reviewers to review and edit an unpublished document and the document's metadata or to review and edit a working copy version of a published document

Note: The unpublished document might have been submitted by a user via the Contribute New Document menu item, or it may have been transferred from another Document Team.

Owner actions

When a document is submitted, it goes into the Triage workflow where the owner can decide on how it should be routed through the workflow process.

To complete a Triage work item:

- 1 Click the search icons or task entry.
In the Task Details page that opens.
- 2 If there are multiple owners in your Document Team, you can click **Accept Group Assignment**. If you are the only owner, the Triage Workflow Form opens instead of the Task Details page.

If you want to reassign the task to another user, see *Reassigning a work item* on page 53.

The **Triage Workflow Form** opens. Depending on whether you are looking at an external document or a new document, the top portion of the page varies.

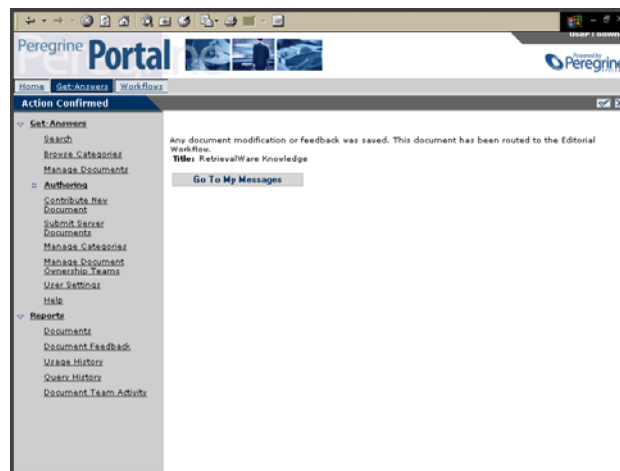
- 3 As an owner, you can adjust the document before passing it on to an editor. Specifically, you can do the following:
 - Decide whether to route the document into the editorial workflow.
 - Publish the document immediately into the desired category.
 - Transfer the document to a different document team.
 - Delete the document.
 - Save changes and return later.

- Don't do anything with the document at this time.

Note: Some of the changes you can make in the document depends on how the administrator has personalized the form, which may or may not allow you to change some of the fields.

- 4 When you decide on the action for the document, click the appropriate button:
 - **Save Changes and Perform Action**
 - **Go To Workflow Details**
 - **Go To My Messages**

If you select, Save Changes and Perform Action, the **Action Confirmed** page opens.



- 5 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, 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.

The screenshot shows a web interface for task details. It has three tabs: 'Detail', 'History', and 'Status'. The 'Detail' tab is active. Below the tabs are three sections:

- General Information:** A table with fields: 'To:' (Editor), 'Subject:' (Using Problem/Solution), 'Sent:' (6/18/03 11:12 AM), and 'Due:' (6/20/03 11:12 AM).
- Detailed Description:** A text area containing instructions: '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: Using Problem/Solution; Status: New document; Submitted by: Otto Orner; Document Ownership Team: Peregrine Get-Answers.'
- Associated Business Object:** A section with a 'Description:' field containing 'Using Problem/Solution; Peregrine Get-Answers; Editorial Work...'. Below this is a button labeled 'Accept Group Assignment'.

- 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.

- Review the instructions in the Detailed Description frame of the page.
- 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 4.

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.

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.

Edit metadata, update external file.

The screenshot shows an 'Entry Form' for an external document. It has several fields and buttons:

- Title:** A dropdown menu with 'External Document Sample' selected.
- Summary:** A text area with 'This is a sample document'.
- File:** A text area with 'toolbox.tbd' and a file icon.
- Document Ownership Team:** A dropdown menu with 'Peregrine Get-Answers' selected.
- Expiration Date:** A date picker showing 'Aug 10 2004'.
- Language:** A dropdown menu.
- Feedback:** A text area with the prompt 'Please type any feedback for the document owners here (2,000 character maximum)'.
- Buttons:** Four buttons at the bottom: 'Save and Mark as Complete', 'Save for later action', 'Go to Workflow Details', and 'Go To My Messages'.

Provide feedback

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.

- 5 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.

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:

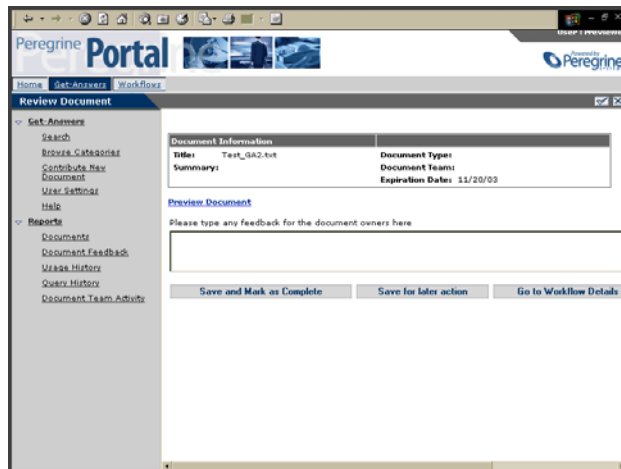
- 1 In your My Messages list, select a Review Document work item by clicking the search icon.

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

Detail	History	Status
General Information		
To:	Reviewer	
Subject:	External Document Sample	
Sent:	8/18/03 11:37 AM	
Due:	8/19/03 11:37 AM	
Detailed Description		
A document has been submitted to you for review. Please review the document to insure correct content, and add comments. Title: External Document Sample; Status: New document; Submitted by: Otto Owner; Document Ownership Team: Peregrine Get-Answers.		
Associated Business Object		
Description:	External Document Sample; Peregrine Get-Answers; Editorial Wo...	
Accept Group Assignment		

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

The Review page opens.



- 3 Review the document and provide any feedback in the text box provided.

Note: If there are multiple reviewers in your document team, click Accept Group Assignment. If you are the only reviewer, you see the form in step 2 instead of the group form in steps 1 to 3.

As a reviewer, you can view the document and its metadata, and view and add comments.

- 4 Click **Save and Mark as Complete** when you finish to send the document on to the Owner. If you need to stop and return to the document later, click **Save for later action**.

The Action Confirmed page opens.

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 is submitted back to the owner to publish, revert, 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.
 - Enter any comments you want to include.
 - Publish the document into the desired domain category.
 - Transfer the document to a different document team.
 - Delete the document if it is unpublished
 - Revert to the published version if it is a working copy of a published document.
 - Route the document back to the Editor.
 - 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 Click **Go To My Messages** to continue reviewing documents.

Reassigning a work item

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 57.




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

The Reassign Task page opens.

General Information	
To:	user, super
Subject:	New Test
Sent:	6/24/03 11:03 AM
Due:	6/25/03 11:03 AM

Select the person
  
Submit

- 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.

First Name: Last Name:

Last	First
Admin	Rome
Affannato	Henrietta
Alfreda	Henry
Balushansky	Lilly
Borahan	Allison
Boyle	Donna
Brobst	Chris
Burdick	Tammy
Cabaj	Candy
Caldeira	Larry

New Search

- 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.
- 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.

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 on the Workflows tab, click the search icon to see a work item task details.

The Task Details page for the selected work item opens.

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

Start Date	End Date	Subject	To	Status
6/24/03 2:07 PM		Another document	Owner / user, super	In progress
6/24/03 2:07 PM		Another document	Owner / Owner, Otto	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 work item.

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

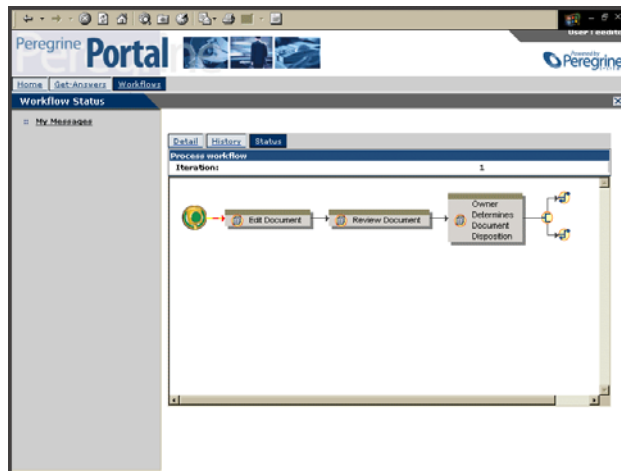
You can use the Task Details page to view the status of the activities for a message listed in your message queue.

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 Task Details page for the selected work item opens.

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



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.

Modifying a process instance workflow

There may be times that an activity needs to be added to a process instance, or other changes to the workflow are required for a worklist item.

Note: Not all users are allowed to modify a workflow. The **Modify Process Workflow** button only appears on the page when you have role that allows you to modify a workflow.

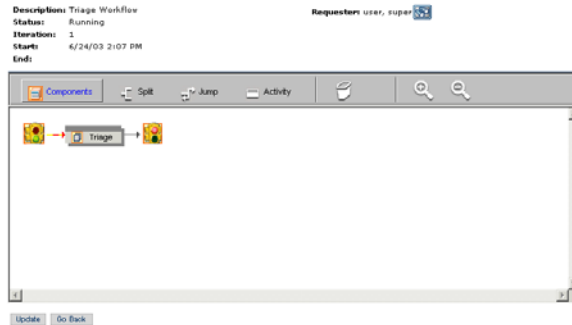
Changes to the process instance workflow do not change the workflow process template. After a process instance is started, it is no longer linked to the workflow template.

To modify the workflow for a process instance:

- From the My Messages page on the Workflows tab, click the search icon to see a work item task details for the worklist item whose process workflow needs to be modified.

The details page for the selected work item opens.

- 2 Click the **Status** tab to display a graphical representation of the process instance.
- 3 Click **Modify Process Workflow** to display the graphical workflow designer for the process instance.



- 4 Add activities using the toolbar icons, or modify or delete activities. See the *Get-Answers Administration Guide* for information on using the graphical workflow designer.

Note: You can only add, modify, or delete activities that are not completed or active for this iteration.
- 5 Click **Update** to save the changes, or click **Back** to cancel changes and return to the work item.

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 relation feature.

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:

[Add](#)

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

To User:



search
icon

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

- Until further notice
 Until specified date

End date:

Aug | 6 | 2003 |

- 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**.

A Search Queries

APPENDIX

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”).

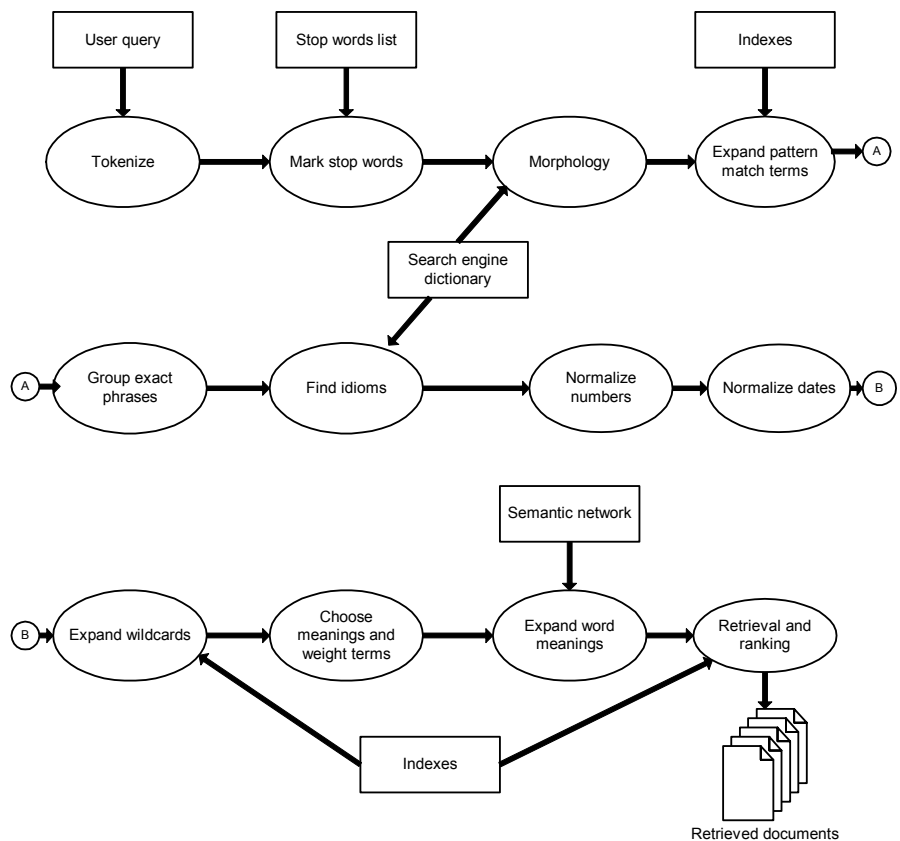
Also removed are certain small-function words called stop words (like “the” or “of”) that provide little value in locating the information you’re looking for. As the query words travel farther down the pipeline, they’re expanded via the dictionary and the links in the semantic network. When the search 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.



- **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
- Strongly related concepts (get, stop, ensnare, trap)
- Weakly related concepts (understand)

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 some 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: 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: 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. Wildcards 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 wildcards 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 <i>except</i> 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 aren't 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 databases 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:

- **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.”
- **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.
- **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 (“ ”).
- **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 (RDBMS)**- 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.
- **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

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

- 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.

Authoring Authoring is the ability to create new documents and edit the content using an RTF editor.

Audit data An historical record of the progress of process instances and activity instances.

Get-Answers collects the following information for process instances and activity instances:

Process Instance	Activity Instance
Date Started	Date Assigned
Date Ended	Date Due
	Date Ended

Automated activity An activity that is performed by a computer, without user intervention.

Business process 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.

Capabilities 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.

Deadline A time-based scheduling constraint where the work item for an activity must be completed by a specified time.

Categories Categories contain published documents. Each category is managed by one Ownership Team.

ECMAScript	Server-side scripting language. Used to write scripts for Get-Answers.
Editor	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.
Editorial workflow	The Get-Answers Editorial Workflow is used to edit and review an unpublished (working copy) document and its metadata.
Escalation	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 <i>Organization- al Role</i>).
Event	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.
External document	A document created outside of Get-Answers. Examples include MS Office documents, PDF documents, and HTML documents.
HTML	Hypertext Markup Language. A language used to compose Web pages, which can be read and displayed by a Web browser.
HTTP	Hypertext Transfer Protocol. 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	Java Authentication and Authorization Service: 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	Java Server Page. 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.
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	<p>A process definition represents a business process and consists of activities where the process tasks are defined.</p> <p>A process definition includes information about the activities and workflow users. Both manual activities and automated activities can be included in the process definition.</p>
Process instance	<p>A single instance of a process as defined by the process definition.</p> <p>A process that has been started is a process instance.</p>
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	<p>A representation of the status of a process instance. The Get-Answers workflow uses the following process states:</p> <ul style="list-style-type: none"> 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.
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.
- 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** Extensible Markup Language: 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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May 24, 2004