



Lotus Domino® Application



GeoCom® Electronic Delivery

Version 5.1 Build 42 – 17 June 2005

Manual for Librarians

Copyright ISG Information Systems GeoCom GmbH, 2001-2004

Table of Contents

| | | |
|----------|---|-----------|
| 1 | INTRODUCTION | 4 |
| 2 | OPEN THE DATA BASE | 5 |
| 2.1 | Location settings | 5 |
| 2.2 | Installation of the data base GeoCom® Electronic Delivery | 5 |
| 2.3 | Open the data base GeoCom® Electronic Delivery | 6 |
| 3 | MAINTENANCE OF THE MAIN DATA BASE | 7 |
| 3.1 | Manual entry of periodicals | 7 |
| 3.2 | Automatic data import | 9 |
| 3.3 | Edit existing entries | 9 |
| 3.4 | Deleting entries no longer required | 9 |
| 4 | REGISTRATION OF TABLES OF CONTENTS | 10 |
| 4.1 | View Tables of contents – scan requests | 10 |
| 4.2 | View Tables of contents | 10 |
| 4.3 | Creating a table of content | 11 |
| 4.4 | Release tables of contents | 12 |
| 5 | REGISTRATION AND DISTRIBUTION OF ARTICLES | 13 |
| 5.1 | View Articles – scan requests | 13 |
| 5.2 | View articles | 13 |
| 5.3 | Making article orders from within Notes | 14 |
| 5.4 | Processing an article scan request | 15 |
| 5.4.1 | Processing requests | 16 |
| 5.4.2 | Scan new articles | 16 |
| 5.5 | Finishing an article request | 17 |
| 6 | ADMINISTRATION | 18 |
| 6.1 | Configuration | 18 |
| 6.1.1 | Common | 18 |
| 6.1.2 | Interest areas | 20 |
| 6.1.3 | Locations | 20 |

| | | |
|------------|---|-----------|
| 6.1.4 | Bbrowser display settings | 20 |
| 6.1.5 | Outgoing messages | 21 |
| 6.1.6 | Special settings | 22 |
| 6.1.7 | License | 22 |
| 6.1.8 | Action "Default settings for new users" | 22 |
| 6.1.9 | Action "Database maintenance" | 23 |
| 6.2 | User management | 23 |
| 6.2.1 | Create user profile(s) | 23 |
| 6.2.2 | Delete user profile | 24 |
| 6.3 | Administration of personal subscriptions | 24 |
| 6.3.1 | Add journals to the personal subscription | 25 |
| 6.4 | Further administrator views | 25 |
| 6.4.1 | View admin - c. article orders | 26 |
| 6.4.2 | View admin - d. messages | 26 |

1 Introduction

GeoCom® Electronic Delivery is a content management system for subscribed periodicals. The application serves for electronic recording and distribution of both tables of contents and articles. It is thus convenient for lawyer co-partnerships with nation-wide locations.

Usually, when new issues of periodicals have arrived, the tables of contents are distributed to the interested readers. Afterwards they can order various articles as copy. This procedure is digitally depicted in GeoCom® Electronic Delivery regarding legally established conditions.

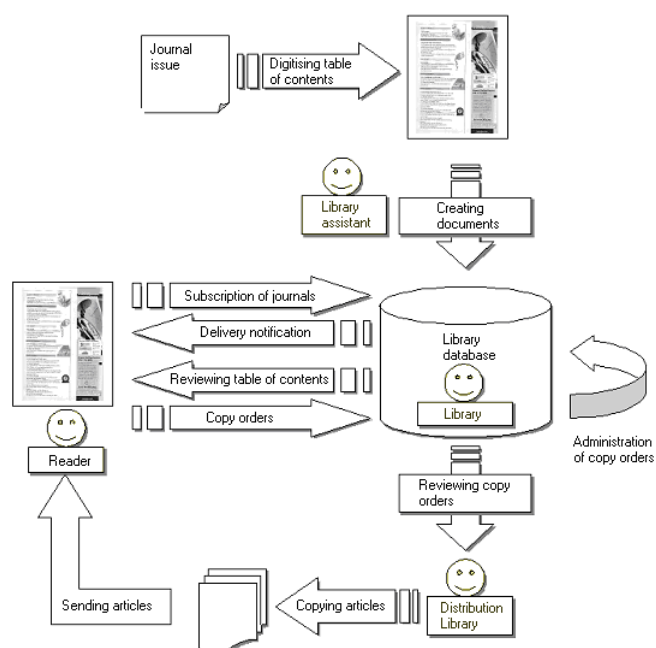


Illustration: Diagram workflow

Readers can access the current holding of periodicals via a web browser (e.g. Internet Explorer) and subscribe to interesting periodicals via mouse-click **(1)**.

These personal subscriptions are saved in the reader's profile. When a new issue has arrived a library assistant scans the index of this periodical **(2)** and provides it online to the subscriber **(3)**.

The subscriber gets automatically informed about the new issue **(4)**. Then he may open the table of content within the standard browser interface and mark those articles he is interested in **(5)** and send the edited table of content to the library **(6)**.

A library staff member processes the copy order **(7)** by scanning the specific article **(8)**. It will subsequently be sent back to the subscriber as an e-mail attachment **(9)**.

GeoCom® Electronic Delivery may be used together with other library data bases, e.g. GeoCom® Library, making benefits from the import- and synchronisation module. Moreover, GeoCom® Electronic Delivery can be used as an independent application. In this case the main data have to entered manually.

2 Open the data base

2.1 Location settings

To ensure full functionality of GeoCom® Electronic Delivery you have to specify "Microsoft Internet Explorer" as your standard browser within your Notes location.

To edit your Notes location, click onto the name of your location at the lower right of the screen. Select "Edit current..." from the menu.

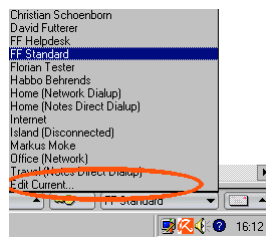


Illustration: Edit current location

The location settings dialog opens. Switch to the tab "Internet Browser" and select the value "Microsoft Internet Explorer" as your standard browser. Then click "Save & Close".

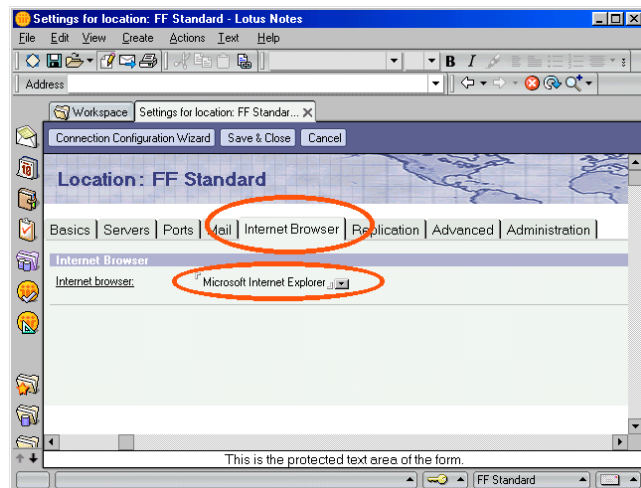


Illustration: Specify internet browser

2.2 Installation of the data base GeoCom® Electronic Delivery

To install the data base on the Notes user-interface, first select

File – Database – Open...

Then select the server on that the data base runs and mark it (GeoCom® Electronic Delivery). Following, click on the button "Add symbol".

2.3 Open the data base GeoCom® Electronic Delivery

The data base can be opened by double mouse-click on the corresponding Notes icon.

The following view appears:

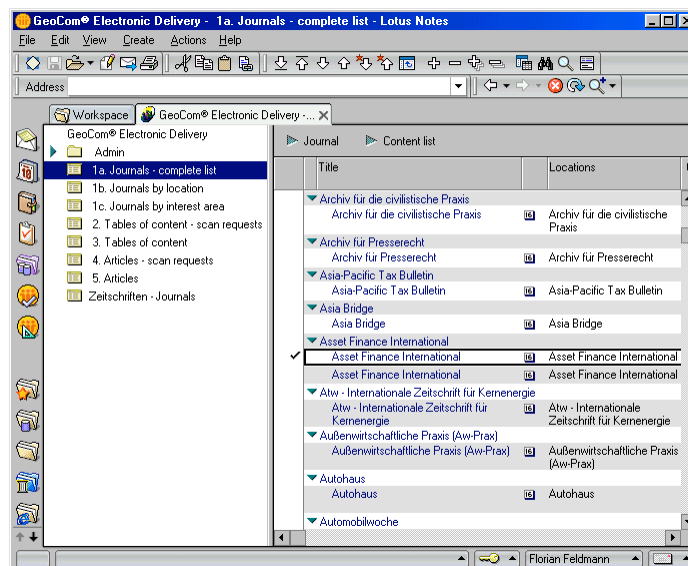


Illustration: View 1a. Journals – complete list

The navigator on the left hand side shows the existing views which you can easily access by a mouse-click. GeoCom® Electronic Delivery contains a total of 8 different views (plus a folder containing administrator views, for librarians with specific access rights).

The view "*1a. Journals – complete list*" shows a list of all periodicals registered in stock. The available issues of these periodicals are subordinated to the corresponding journal.

The view "*1b. Journals by location*" contains the complete list of all periodicals registered in stock sorted by names of locations which dispose of the journals.

In the view "*1c. Journals by interest area*" the in stock registered periodicals are sorted by interest area. Journals which cover more than one interest area, appear several times in this view, once in each corresponding interest area.

The view "*2. Tables of contents – scan requests*" shows, arranged by processing location, to which journals employees subscribed via the browser interface. Only these indexes have to be created separately (e.g. scanned).

The view "*3. Tables of contents*" contains all existing indexes. At arriving of new issues of subscribed journals library staff member first checks whether the requested table of contents is already scanned before the request is processed

The view "*4. Articles – scan requests*" shows the indexes which can be edited by the readers via browser interface. They are arranged by distribution location/person and date of request. Here, the library assistant who is responsible for the distribution can look up which articles they have to scan and send to the corresponding reader.

The view "*5. Articles*" contains the already scanned articles.

The view "*Journals*" lists the whole stock of all journals available in the data base. However, there are no actions for this view as it gives just an overview to the reader.

3 Maintenance of the main data base

The librarians' task is to maintain the periodicals collection within GeoCom® Electronic Delivery . This includes recording new journals, constantly updating the existing entries and deleting obsolete entries.

The view "1a. Journals – complete list" contains all journals currently saved in the stock of GeoCom® Electronic Delivery, including the existing issues.

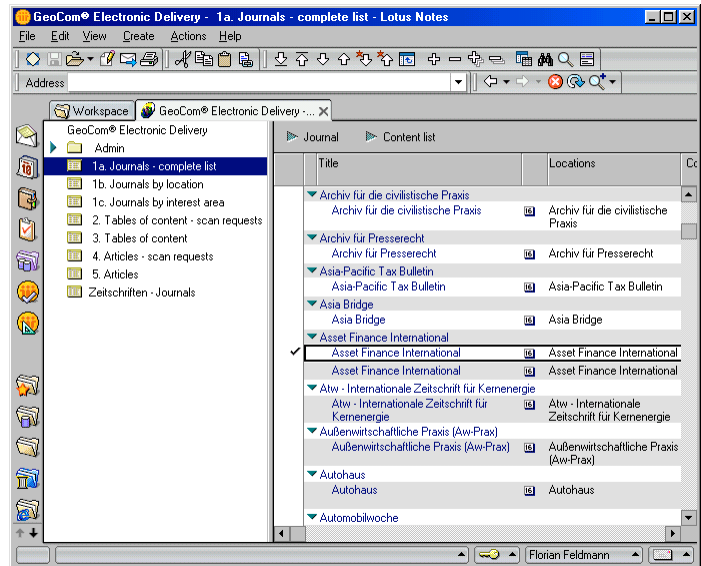


Illustration: View 1a. Journals – complete list

3.1 Manual entry of periodicals

If the holding of periodicals cannot be imported from a library data base, or if single entries, which should not appear in the library data base, are to be added, these entries have to be created manually.

Therefore, you may find an electronic form at your disposal by clicking on the button "Journal – Create Journal" where you can enter the corresponding data.



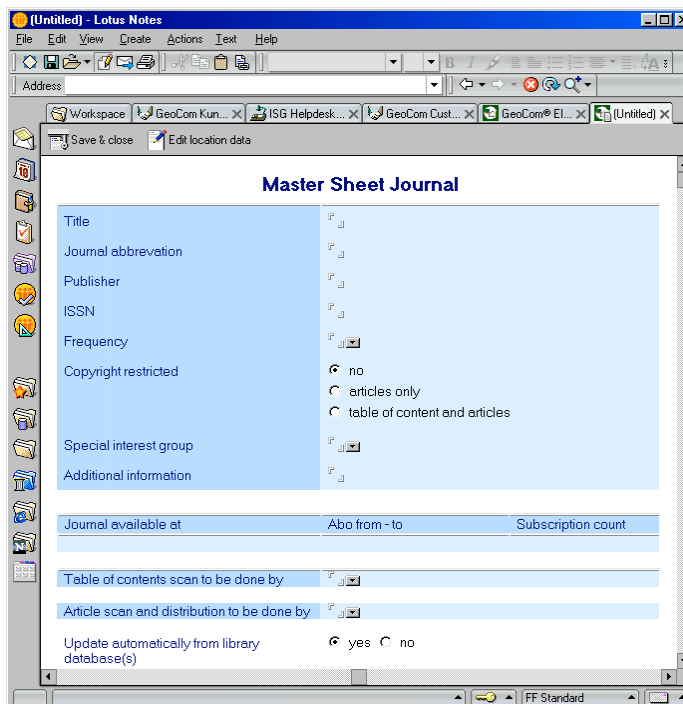


Illustration: Form create journal

First, insert the title of a journal, if necessary a journal abbreviation, as well as the publisher and the ISSN number (it is important for the holdings check). Journals that do not possess an ISSN number need a pseudo-denomination.

Optionally, you can indicate the intervals in which the journal is published using the field "frequency".

If you wish to block the digitisation, enable the copyright restriction for articles. The table of contents of this issue can still be distributed to interested readers, but not the articles. If, additionally the table of content is to be restricted, enable the restriction for directories and articles. Those periodicals cannot be subscribed by interested users and no indexes can be created!

The field "Special interest group" conduces to the cataloguing of the journals which later can be displayed by department. (e.g. within the browser interface for readers).

Using the button "Edit location data" a dialogue box is opened. It enables you to insert the duration and number of subscriptions for each location. Confirm your settings with "OK".

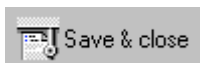
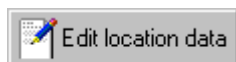
Then type in the persons' in charge for scanning and distributing articles. Depending on the configuration you can select the responsible location or reassign the responsibility to a person from the address list.

The field "Update automatically from data library base(s)" determines how the data belonging to the journal should be maintained.

Select "yes" so that you can neither change manually the entry's title, publisher, ISSN number and interval of publication nor the entries concerning the location. In the following those values are maintained by the import data base ED Import.

If it is not possible or wanted that the update of this journal is made automatically out of the library data base, choose "no". In that case the periodical is ignored by the update agent and all changes have to be made manually.

With a click on the button "Save & close" a new journal entry with the specified data is created.



3.2 Automatic data import

In case the data stock is already stored within a library data base (e.g. GeoCom® Library) the additional import module "ED Import" can be used to ease adoption of data from the library data base into GeoCom® Electronic Delivery.

3.3 Edit existing entries

By double clicking on an existing journal entry you open it on approval.

If you wish to change the data click on the button "Edit" or double click within the document.

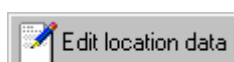


Now, you can change the following fields:

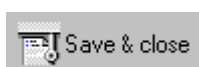
- Copyright restriction for article and/or table of content
- Special interest groups to allocate the journal to another category
- Responsibilities for the registration of tables of content
- Registration and distribution of articles

If in the field "Update automatically from library data base(s)" the option "no" is check marked, you can additionally change title, publisher, ISSN number and interval of publication and edit the location data.

Clicking on the button "Edit location data" you can change the location data.



After you have made the required changes click on "Save & close" to finish processing.



3.4 Deleting entries no longer required

Take care deleting documents! Even documents deleted by accident cannot be restored after deleted once!

The import- and update function – if configured – permanently transcribes new entries and changes from the stock of your library data base. However, entries which are deleted within the library data base are not automatically removed from GeoCom® Electronic Delivery!

If certain entries are no longer needed in GeoCom® Electronic Delivery, they have to be removed manually by a person with the access right to delete documents.

Therefore, select the document you want to delete (journal or single issue) by mouse-click and press then the delete key (usually "Del"). A trash icon appears next to the document. To remove the document definitively from the data base, press "F9" and confirm with "Yes".

4 Registration of tables of contents

Via browser interface readers can mark journals from the GeoCom® Electronic Delivery stock they are interested in.

Thus, the scan requests for tables of contents are to be processed by the librarians. Consequently, after a new issue of a journal has arrived, library assistants digitise the directory and make it online available.

4.1 View Tables of contents – scan requests

The view "2. Tables of content – scan requests" shows the journals, listed by processing location, which are subscribed by at least one reader.

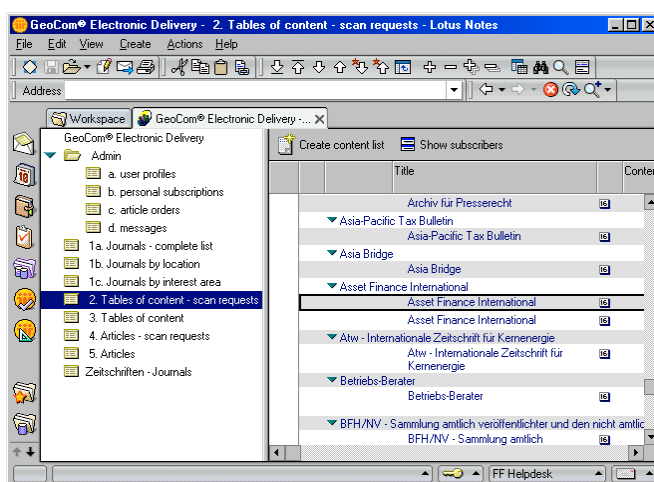
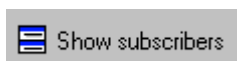


Illustration: View 2. Tables of content – scan requests



Using the button "Show subscribers" you can see who has subscribed to the selected document.

4.2 View Tables of contents

The view "3. Tables of content" contains all existing indexes. At arriving of a new issue of a subscribed journal, the library assistant first checks if the requested table of contents is already digitised before the order will be processed.

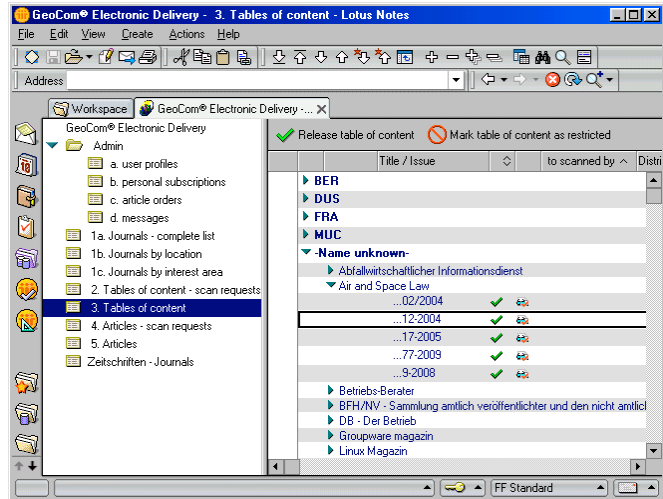


Illustration: View 3. Tables of content

4.3 Creating a table of content



Mark the journal of which a new issue has arrived in the view 1a., 1b., 1c. or 2. and click on the button "Create content list". The following form opens:

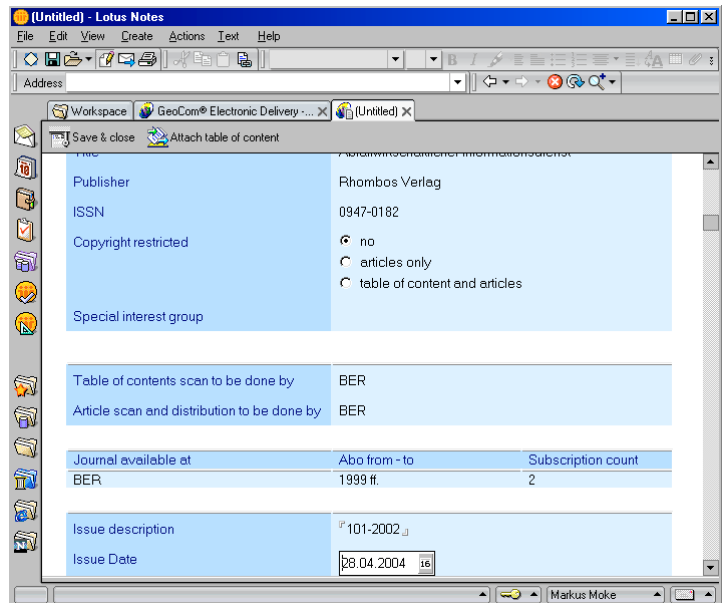


Illustration: Form create content list

The entries "journal", "publisher" etc. are directly taken from the corresponding journal document. Now, insert the current issue date and the description (e.g. "04/2004").

In the field "Table of content" you can insert contents as 'jpg' or 'gif'. (to print them, digitised pages are automatically scaled to A4 to place requests including title and comment on one page).

In exceptional cases you can link contents in the following three ways.

1. as an attachment as a 'html'- file (ending 'htm' or 'html'. Please note, that links relative to documents and pictures are not functional, respectively are not displayed. Links and pictures whose position is given absolute, can be displayed if an internet connection exists. The option "Order marks from browser allowed" has to be check-marked with "no".
2. as 'html'-source code (HTML-source code must be set in squared brackets. **Example:** [`<html><head><titel> table of content</titel></head><body>Text</body></html>`])
3. as text or picture via 'copy & paste' (This method might need a lot of memory. Pictures that are integrated that way, are not automatically scaled. Problems could occur at printing.)

To attach a file to a Notes document, do the following:

Mark the field you want to place the file in (here: "table of content"), and select from the menu:

File – attach

or use the quick-bar-Icon "Paperclip", respectively the button "Attach table of content".

Now, select the file you have saved before, and click on the button "create" to attach the file to the document.

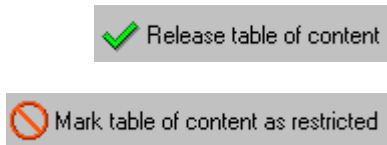
With a click on the button "Save & close" the table of content document is created



4.4 Release tables of contents

Then, you can select from the view "3. Tables of content" whether the directory should be accessible for online-monitoring (this is a default-setting) or not.

Restricted tables of contents do not appear online. You can declassify the tables of contents by selecting the concerning document and click on "Release table of content". If you do not want the index to appear in the online view you can block it by using the button "Mark table of content as restricted"



5 Registration and distribution of articles

When the tables of contents have been made online available, readers may access them via browser interface and process them using various text markers to indicate the articles they are interested in. The edited directories are then sent as a copy order to the library. To process these requests the articles are digitised and sent back to the reader.

5.1 View Articles – scan requests

In the view "4. Articles - scan requests" the tables of contents processed by the readers via browser interface are displayed. The library staff members who are responsible for the distribution of articles can see which articles they have to scan and send to the reader. Article orders can be sorted by distribution location and person in charge as well as by date.

The number of open orders per location will also be shown.

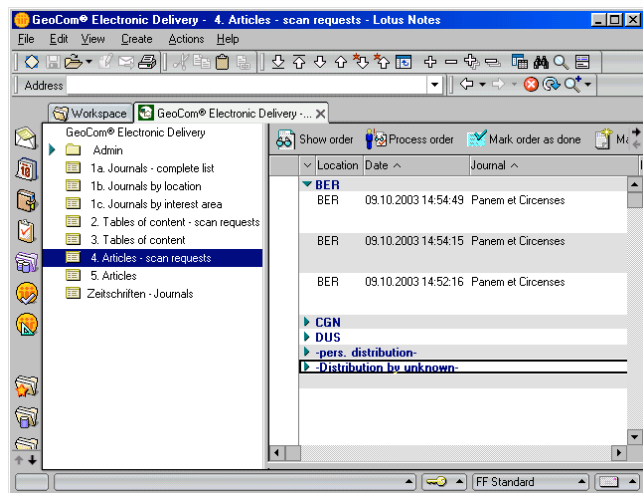


Illustration: View 4. Articles - scan requests

5.2 View articles

The view "5. Articles" contains the already digitised (scanned) articles.

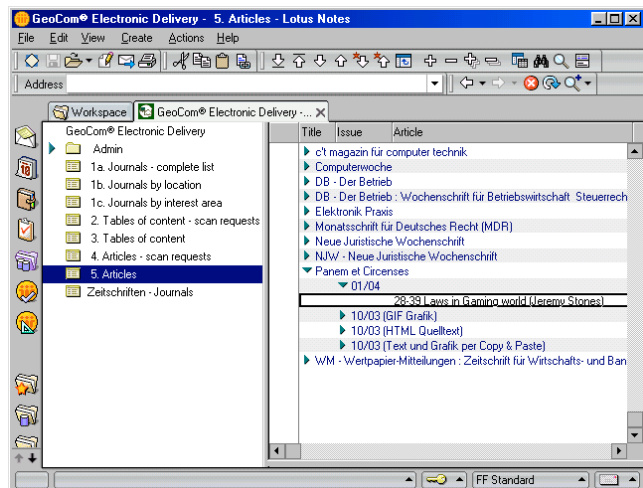


Illustration: View 5. Articles

5.3 Making article orders from within Notes

Aside to the 'normal' way of ordering articles via the web interface, a librarian can record an article order on behalf of an employee directly from within Notes.



For this purpose, the button "Make article order" is available from view "4. Articles – scan requests". Clicking the button opens this dialog:

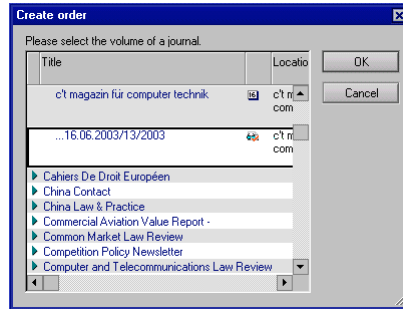


Illustration: Dialog Select journal issue

Once you have selected an issue and confirmed with "OK", another dialog opens in which you can create the order. Unlike to access via the web interface, librarians do not see the table of contents for marking. The desired articles can be specified within the field "Comment" (e.g. via page numbers).

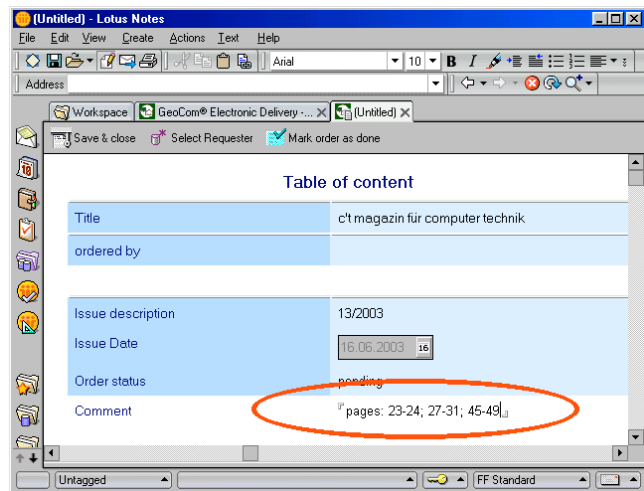
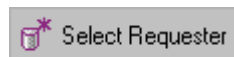


Illustration: Create article order from within Notes



Using the button "Select Requester" you will get a selection dialog from which you can pick one of the employees as requester.

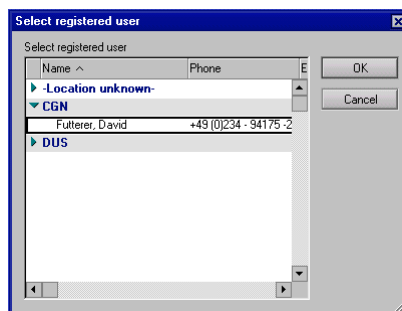


Illustration: Dialog Select requester

5.4 Processing an article scan request



You mark an article scan request in the view "4. *Articles - scan requests*" by clicking on it. Then use the button "Show order" to see the corresponding request.

For instance the following view appears:

Illustration: View article scan request

This view contains a header in which title and denomination of the journal can be seen. Moreover, the footer shows information concerning the request (reader, request date and status) and possible comments edited by the reader.

Simon Kruse 05.04.2004 07:46 - open - BER - +++ **urgent!!!!!!**

Illustration: Footer of an article request

The table of contents of a corresponding journal is also shown. The library assistant gets informed on the selected article by means of a marker.

Clicking on the button "Print preview" you see the browser's print preview. You may directly send the displayed request to the selected printer.

If the article already exists in the data base they can be sent to the re

quester, missing articles must be scanned before that

5.4.1 Processing requests

First, mark the request you wish to process and press then the button "Process order".

GeoCom® Electronic Delivery automatically checks whether there are articles of this journal already available. If so, a dialogue box opens and offers all items of this periodical.

Illustration: Dialog Send articles

Select all articles requested within the corresponding order. Clicking "OK" will send all selected articles to the requester. To attach a message for the requester, simply enter your message text into the field "Information for recipient". Contents of this field will automatically be attached to the articles.

If one or more requested articles are not yet available within the list, these articles have to be created first. In this case, you should not send any articles, but wait until all requested articles exist and can be sent at once.

5.4.2 Scan new articles

If articles which are not available in the data base are ordered, they obviously are not displayed in the dialogue box for sending articles. In this case you have got to create a new article document.

Select "--- Create new article ---" from the list and confirm with "OK". This way the article transmission is stopped and a dialog to create an article is opened.

Illustration: Form Create article document

Title and issue description of the journal are automatically copied from the journals document.

Insert the title of the article, the author and page info into the corresponding fields.

Digitise (scan) the article and save it into the corresponding file format (e.g. .pdf or .jpg).

Click then on the button "Attach article scan" to open a dialogue box. Select the digitised and saved file and click on "Create" to attach the article to the document.



If you have entered all relevant data concerning the article and attached the scanned document, click the button "OK" to store the article to the data base. You will automatically return to the dialog "Send articles" and can select your created entry for sending or you can create another article by following the same procedure.

5.5 Finishing an article request

If all requested articles are sent to the reader, the copy order process may be closed by clicking on the button "Mark order as done". If you confirm the appearing dialog with "Yes", the status of the selected order will be set to "done".

With this button you can change the order status of all selected orders at once.

Illustration: Dialog Modify status

Advice: Articles which are marked as "done" are not shown in the view "4. Articles - scan requests" any more. In the view "Admin c. article orders", however, processed articles as well as not processed articles are displayed.

6 Administration

Only users (readers) who dispose of administrator rights can use the following views and actions.

6.1 Configuration

To get to the configuration settings of GeoCom® Electronic Delivery select from the menu:

Actions – Configuration.

Here you can change the categories *Common*, *Interest areas*, *Locations*, *Browser display settings*, *Outgoing messages*, *Special settings* and *License*. The Action “Configuration” is only available from the “Admin” views.

6.1.1 Common

With the first check mark box you determine whether changes in the library data base should also influence the corresponding documents in GeoCom® Electronic Delivery.

The following two check boxes define whether scan requests for directories and/or scan requests for articles are processed dependent on location (check box: marked) or person (check box: deactivated).

In addition, you may define the return address for e-mail messages and determine whether in the Notes interface the location should be listed with the number of copies available there.

6.1.2 Interest areas

In the field "Interest areas" you can insert one interest area per line. These entries are at your disposal, as e.g. subject heading list when you create or process documents.

Via the button "Sort" you can sort the entries alphabetically.

The middle column holds the keywords, whereas the left and right column serve to format the display of interest areas within the browser. If a row should not contain a formatting tag, specify a minus sign "-".

Ex.: The screenshot below shows the configuration necessary to display "Corporate" in blue, "EPB" in red colour within the browser. All other entries will be displayed in normal (black) font.

Illustration: Configuration, section Interest areas

6.1.3 Locations

Likewise, in the field "Location (short form)" you can do one single entry per line. These entries are selectable as location entries.

The button "Sort" will sort all entries alphabetically.

6.1.4 Browser display settings

Given the name of the resource you can define the logo that should appear in the header of the web interface. Your own picture resources can be inserted in the data base at will. Please note, that the height of the picture must not exceed the height of the header frame.

Moreover, you can determine size, colour and font of the browser in

terface.

Via check boxes you can select whether all copies of a location should be listed (or only one location) and if the directory number should be linked to the corresponding journal.

Additionally, you can define the width (in pixels) which scanned tables of contents should be displayed within the browser window.

Finally, the symbol that will be used to mark the tables of contents in the browser interface, can be separately selected by each user.

Illustration: Configuration, section Browser display settings

6.1.5 **Outgoing messages**

In this section you can define, how many days sent messages (table of content notifications as well as sent articles) should be kept in the data base before they are discarded automatically.

Enter "0" to avoid automatic deletion of messages. Be aware, though, that in normal workflow the application usually generates multiple mes

sages, thus the data base size can soon exceed limits!

6.1.6 Special settings

Concerning their function, these settings accord to GeoCom® Library. For special settings, please send an e-mail to helpdesk@geocom.de.

6.1.7 License

These fields contain information about duration and character of using the license and cannot directly be edited.

Using the button "Update" you open the entry form in which you can enter the relevant data and the new license code in case of updating.

6.1.8 Action "Default settings for new users"

The default configuration for new users can be done by an administrator from the opened configuration document. Select from within the configuration document:

Actions – Default settings for new users

The form "Default settings for new user" will be opened. Enter all default values into this form.

Illustration: Form Default settings for new users

6.1.9 Action "Database maintenance"

Also from within the opened configuration document, the administrator can access the action "Database maintenance".

Activating this action will result in checking all documents for changes within their corresponding title documents.

Furthermore, this action checks all entries for duplicate ISSN numbers and will issue a corresponding warning when duplicate ISSN numbers are found.

Illustration: Warning dialog for duplicate ISSN numbers

6.2 User management

The view "Admin – a. User profile" provides you with all user profiles for the data base GeoCom® Electronic Delivery.

Illustration: View Admin – a. User profile

If a reader, who does not yet have a user profile, applies for the first time via browser interface, a new profile document with the default settings is created.

6.2.1 Create user profile(s)

The administrator can create profiles for already known readers in advance. Therefore he uses the button "Create user profile(s)" which opens the following form:

Illustration: Form Create user profile(s)

The users for whom you wish to create a profile are selected from the Notes address book and added to the list field. Common data of all users can be inserted now so that the users do not have to do it themselves. If there are no entries made in compulsory fields, readers are asked to complete their profile at their first registration.

6.2.2 Delete user profile

You can remove obsolete user profiles from the application by using the action "Delete selected user and subscriptions" from view "Admin – a. user profiles". This action removes the selected user as well as all personal subscriptions done by him or in his order, once you confirm the appearing dialog with "OK".

6.3 Administration of personal subscriptions

The view "*Admin - b. personal subscriptions*" gives an overview of all journals the concerning employee has subscribed to, arranged by subscriber.

Illustration: View Admin - b. Personal subscriptions

6.3.1 Add journals to the personal subscription

Using the button "Create personal subscriptions" a dialogue box is opened which enables you to add journals to the personal list of subscriptions.

Illustration: Dialog Adding journal to personal subscriptions

First, select the periodicals you want to add: Press then the "drop-down" button and select the relevant journals from the list by ticking them. Confirm with "OK" to adapt the entries. Now, select the reader whose personal subscription you want to edit. You do this proceeding the same way like choosing the journal entries.

Confirming with "OK" the selected periodicals are automatically added to the personal subscriptions of the readers, if these entries did not exist before.

6.4 Further administrator views

The views "*Admin - c.*" and "*Admin - d.*" mainly serve for statistical purposes.

6.4.1 View admin - c. article orders

Illustration: View Admin - c. Articles - article orders

This view contains, arranged by distribution location, all pending article orders which also appear in the views 4a. and 4b. Moreover, for processing the same buttons are at your disposal. Additionally, just as pending orders, all processed article requests can be seen and even marked as pending again.

6.4.2 View admin - d. messages

In this view you may find, arranged by reader, the messages sent informing about arrived issues as well as e-mails which contain the requested article.

Illustration: View Admin - d. messages