

ELOQUENT SYSTEMS INC

Eloquent WebSuite™ Planning Guide

Volume WS1 –Administrator Functions



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This manual covers all the functions used by the administrator of any Eloquent WebSuite™ application.

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Introduction

Who should read this guide?

This volume of the planning guide is for the person responsible for the administration of any Eloquent WebSuite application – library, museum, archives, or records management. The information is not required for the public or a staff user performing daily functions only.

When should it be read?

Some of the information in this manual is required prior to installing the application, some is may be required on a monthly basis and other information is required to ensure high performance of the application.

What other volumes apply to all WebSuite applications?

The four Eloquent WebSuite applications share much of the software. As a result the following manuals apply equally to all applications.

- Volume WS1 – Administrator Functions
- Volume WS2 – Managing Authority Files
- Volume WS3 – Structuring Data for Output
- Volume WS4 – Pointers, Hierarchies & Hyperlinks

What is this volume about?

This manual does not cover the initial installation of WebGENCAT and the WebSuite. There is a separate document for that purpose to be used by the IT department. This manual contains information relevant to the performance of the applications, establishing certain configuration parameters, setting up users and user groups, and performing ongoing maintenance tasks.

License Information

How do I get a count of the records in each of the files in my system?

Go to menu item *General > Display license* for a table listing all the files in the WebGENCAT system. Some will not be relevant to your application. The prefix for the name indicate that they were designed specifically for one application: ARC – archives, LIB – library, MUS – museum, REC – records, and SUT – shared by all applications. In addition, your application may share a table designed for another application. The **Current capacity** column indicates how many records are in the table.

What are the most important files? What information do they contain?

The following are the main files:

- ARC – Archival Description contains all the descriptive records for Eloquent Archives.
- LIB – Titles contains all bibliographic records for books and other resources, including volumes and issues of journals.
- SUT – Authority contains the various topical subjects. For the library application it also includes proper names because that is the convention for MARC records.
- SUT – Name Authorities contains all the authorized proper names.
- SUT – Inventory Location includes all the storage spaces in a warehouse along with the other records that create the hierarchy.
- SUT – Items/Copies contains physical items for all the applications: copies of books for library, folders and boxes for archives and records, and artifacts for museum.

What other information on the license display is relevant to me?

Most of it may be of no interest. However, an Eloquent support person may ask you to relay it if they are trying to diagnose a problem. The content of the report will vary depending upon your unique license key.

File Resizing

Why is it necessary to resize data files?

The file management software in the Eloquent WebGENCAT is a product used in the banking industry, so must be very stable. It did not introduce automatic re-sizing of files until a recent version. Therefore, all Eloquent releases prior to v.5 require occasional re-sizing of files. If a lot of data has been added to files since they were first delivered the extra data goes into overflow tracks. As a result several reads may be required to find the record requested.

How frequently should I do it?

Do it whenever the number of records has been increased by 15% or more.

Do I have to re-index after resizing?

No, there is no advantage to re-indexing.

How do I do it?

If you are an Eloquent SaaS customer, you do not have to do anything. Eloquent maintains the system when required. If you are running the software on your own server you will require access to the server. That may mean asking for help from your IT department. The process is as follows:

1. Stop WebGENCAT.
2. For security, be sure you have a recent backup your system.
3. Go to the WebGENCAT start menu > Utilities > WebGENCAT TCL Prompt. A console window will open.
4. Type "`cd../data/[data folder]`," where *data folder* is replaced by your unique folder name, and press Enter. To find the correct substitution for [data folder], open Windows Explorer and go to WebGENCAT's installation root\data. Your data folder is a subset of this folder.
5. Type "`jrf -deovl`" and press Enter.
6. Some status information will be displayed. When you are able to type again, that means that the process was completed. Type "`exit`" and press Enter to close the console window.
7. Start WebGENCAT.

Do not hesitate to contact the Eloquent HELP Desk for assistance.

Performance Considerations

Do searches ever scan the entire table?

No, most access points are indexed fields, so scanning is not involved. If an un-indexed field is involved a limited number of records will be scanned. The results will contain a message that the search is not complete. You can specify the scan threshold.

Are the results of a search always sorted?

They usually are. The exception is when there is a large number of results. On those occasions you will probably re-do the search for more precise results. So, you are saved the sorting time. You are able to set the threshold number that determines the sort.

Is the default sort sequence efficient?

A number of data fields may be included in the sort sequence. Some may even be derived from other records and other tables. This can create a lot of overhead. If you are not getting satisfactory response time it may be because of the sort. Ask your Eloquent support person for recommendations. The sort may be unnecessarily complicated for your configuration.

How long is one browse page of search results?

A search returns the entire list of keys and then deals them out one page at a time. You can set the parameter that determines the number of items per page. A small number will mean faster response and possibly no scrolling.

How do I set the thresholds described above?

These parameters are usually set by Eloquent during the installation phase. However, after more experience with your application and the power of your hardware and network platform you may get better performance with the thresholds changed. Contact the Eloquent HELP Desk to get them changed. You may want to consider a change whenever you upgrade the software or are having some other custom tailoring done.

Creating Users & User Groups

How many different users can I create?

There is no limit. They can each have a personal name, password, email address, and branch affiliation.

What is the advantage of personalized users?

Their name will be stamped on each record they create or modify. This helps in quality control and training. Also, some output such as an Excel file of selected records, will be sent directly to their email address.

What does the branch affiliation control?

This will be active only if the **Branch Module** is installed. If it is active it controls the records the user creates and is permitted to see. Certain tables can be designated as branch-sensitive. Every record created for the table gets the appropriate branch code stamped on it and users will be restricted to seeing only the records for their branch. Some files/tables may have no restriction. Some users may be designated **Global** to have access to all records.

Can users change their own password?

Yes, there is a link on their **Menu** page for that purpose.

Can the administrative user see and change all passwords?

Yes, an administrative user has full control over all user function, including the creation and deletion of user.

Do all users get the same menu?

No, they get the same menu as everyone in their user group, but every group is usually different.

What other function is assigned to a user group?

The menus assigned provide most of the control related to the functions the user can perform. You can also assign a language and a read-only designation. Additional restrictions can be assigned. This requires an in-depth knowledge of the software, so should not be done without the assistance of an Eloquent support person.

What does the language designation control?

This feature is active if you have the **Multi-lingual Module**. All users in the group will have their entire user interface in the designated language. Also all other text from the database will be displayed in that language if it has been translated.

What does a read-only designation do?

The primary user is for the public user group. You do not want them to have the ability to write to the database or modify it. It is also of value for training new users. They will get access to all the data entry Web forms and will be able to bring existing data into the forms. They will also be able to read all the Help available at every prompt. However they cannot write to the database.

How many different user groups usually come with an Eloquent application?

The names may differ, but there are always the following three main user groups:

- **Public** – for internal and external researchers. They get read-only capability and usually gain access without a password. However, it could be just as secure as any other group.
- **Staff** – for people doing the day-to-day creation and maintenance of the knowledge base. This is sometimes divided into a senior and basic group. Also, read-only versions of staff users may be available for training purposes.
- **Administrator** – is usually for only one or two people that are responsible for the set-up of the application and ongoing maintenance. This volume of the planning guide describes some of their function.

Additional user groups are often available for the additional modules.

Does every customer for an application get exactly the same menu items?

No, it will depend on the modules provided by the license key. The user group and the license key determine the functions available to the user.

Can I get an overview of what is available for a specific user group?

Yes, Log in as a user for that group and request HELP for the initial menu. It gives you a brief description of what can be done with each menu item. A printable version of the HTML document is available.

Batch Email

How do I send batch Email to people?

You select the desired people from the people table and then from the browse list select the desired email from the **Go** process. An example may be all the people that have borrowed items that need to be returned. Or, all people that have donated items and require a thank-you letter.

How is the Email created?

A “form” Email is usually available with the application and custom tailored for you by Eloquent when the application is installed. The sending process merges relevant current data with the Email form to create the Email.

Who can I send email to?

You select the desired people from your “people” file/folder. Their records need to contain a valid email address.

Is email ever sent automatically?

Yes, in a situation where a “Member” places a request for something directly into the database an Email can be triggered to be sent back confirming the request. The **Member Module** is required to enable this function.

Can I see the batch of Email that gets sent out?

Yes, batch Email happens in a two-step process. The first step prepares each Email and places it in a file. In the second step a “mailer” routine sends the Email out on the Internet. They remain in the intermediate file, so another menu item gives you the ability to search and display them.

Do I need to purge the email file?

Yes, a good practice is to empty the file prior to sending out a new batch. Otherwise, the file will be in “overflow” and the process will dramatically slow down. There is a menu item for purging the old email.

Deleted Records (Eloquent Recycle Bin)

Can any user delete records from the application?

No, when users click the **Delete** key the record will only be flagged as deleted. A flagged record is as good as deleted for everyone except a user in the Administrator group.

Can a flagged record be restored?

Yes, a user belonging to the Administrator group can restore any flagged record.

How are records permanently deleted?

A user belonging to the Administrator group has batch processed to permanently delete flagged records.