decisia
by **lexum**

Using the Decisia Administrative Interface (for Editors)

v. 4.4

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When using this guide, please be aware that most of Decisia's labels can be personalized. Therefore, some of the terminology employed may differ from the terminology found in your Decisia installation.

For example, you may see "Docket Number" in your Decisia installation instead of "File number", or "Style of cause"

instead of "Case name".

1. Logging into the Administrative Interface

[1] Use the login credentials and URL provided by Lexum, or an Admin user from your organization, to log into your Decisia administrative interface via the Login page (see Figure 1).

1.1 Forgotten Password

[2] Should you forget your password, there are two ways to generate a new one: automatically or manually. Generating the password automatically should be favoured.

1.1.1 Generating a New Password Automatically

[3] To automatically generate a new Decisia password, click on the "Forgotten Password" link on the Login page. Enter the email address associated to your user account and click on "Send Validation Code".
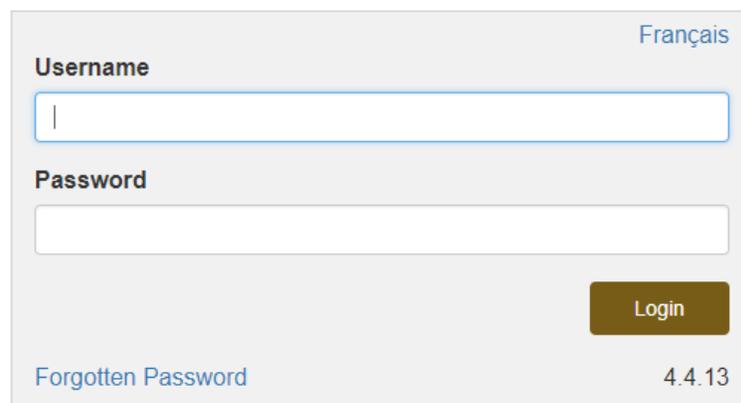
Figure 1 – Login Page

Figure 2 – Generating a new password automatically

[4] Soon after, you will receive an email containing a validation code.
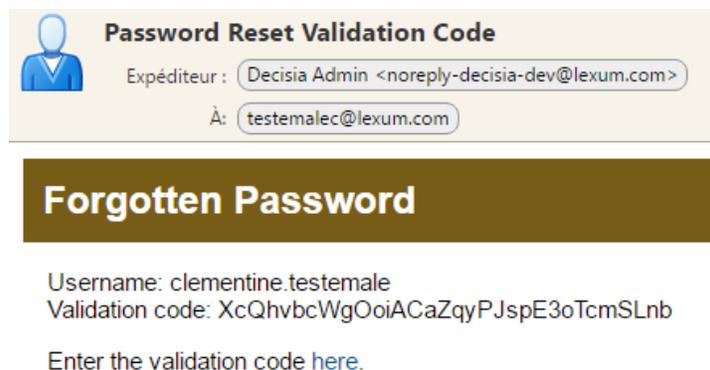
Figure 3 – Email for password reset

[5] Copy the validation code from the email and paste it into the field provided after clicking on the link "Enter the validation code here". Click on "Validate code and reset password". A new password will be generated and provided to you.
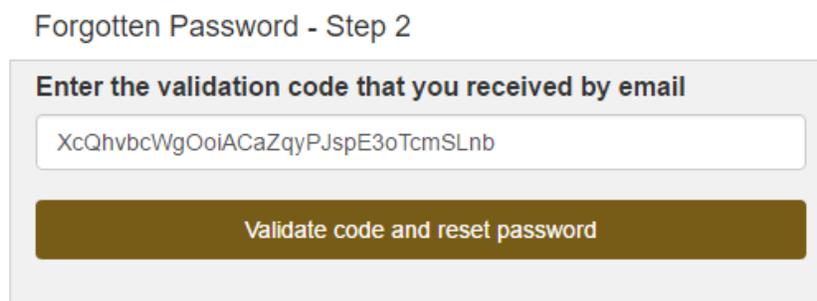

Figure 4 – Validation code for password reset

Figure 5 – New password automatically generated

[6] Copy your new password and click on the "Login link". This will bring you back to the administrative interface Login page (see Figure 1) where you can paste your new password and sign in successfully.

[7]   You can change this automatically generated password to a password of your choice via the "My Account" tab (see section 9).

1.1.2 *Generating a New Password Manually*

[8]   You can also ask an Admin user to access your login details and create a new password for you manually. When you log into the system for the first time with this new password, it is recommended that you change it in the "My Account" tab (see section 9) so that you are the only one who knows your password.

2. Main features of the Administrative Interface

[9]   Here is what you can expect to see when you log into your Decisia administrative interface:

Figure 6 – Decisia administrative interface

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1. Menu: You can navigate the Decisia administrative interface with the different menu tabs "Decisions", "Resources" (which you may or may not see, depending on the configuration of your Decisia installation), "Audit Trail", "My Account" and "Help".

2. Quick links: These links allow you to quickly navigate between the administrative interface and the website, change the language of the administrative interface (if you have a bilingual or multilingual installation) and log out.

3. "Add new decision": This button lets you access the Decisia form for adding a new decision to your database. An equivalent "Add new resource button" exists in the "Resources" tab.

4. These search fields allow you to search and find all the decisions that exist in your Decisia database. Depending on the configuration of your installation, you may be able to search with a few additional search fields (ex: Decision type). An equivalent section exists in the Resources tab.

   a. ID: Every decision published in Decisia is assigned a unique ID. This ID can be found in a decision's URL (ex: http://scc-csc.lexum.com/scc-csc/scc-csc/en/item/15478/index.do).

   b. Terms: This is a full text field that allows you to search for decisions by case name, neutral citation, file numbers, parties and decision-maker(s).

   c. Date between: This field, which offers a calendar widget but also allows you to enter dates manually (YYYY-MM-DD), lets you search for decisions by their date.

   d. Publication status: This drop-down field lets you search for decisions by publication status "Publish", "Hold" and" Do not publish".

   e. Groups assigned to decisions: This drop-down field lets you search for decisions by "Public users", "Intranet viewers" or any other personalized group.

f. Last modified: This field, which offers a calendar widget but also allows you to enter dates manually (YYYY-MM-DD), lets you search for decisions by the date they were last modified.

5. "Search" and "Reset": The "Search" button allows you to launch a search in your Decisia database and the "Reset" button lets you wipe clear all search fields.

6. "Export results into a file": See section 10.

7. "Results": The results pane is where the results of your database search will be displayed. Clicking on the header of a column in the results pane allows you to sort by that column.

8. "Modify selected decision": To modify a decision, select it from the Results pane and click on the "Modify selected decision" button. Alternatively, you can double-click on the decision you wish to modify.

9. "View history": By selecting a decision from the "Results" pane and clicking on the View history button, you can access the decision's audit trail history (see section 8.1).

3. Visibility of Documents on the Website: Groups

[10] The visibility of a document on the website depends on the group(s), as well as the collection, which are assigned to it. By default, Decisia comes with 2 groups: "Public users" (sometimes called "Unrestricted") and "Intranet viewers".

[11] This visibility is reflected in the "Summary of access rights" field in the "Add/Edit Decision" form (see section 4). The "Groups" and "Summary of access rights" fields become visible when the publication status of the decision is "Publish".

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Figure 7 – Publication status, Groups, Summary of access rights

3.1 To make a document visible to the public

A. Both the collection and the document must be labeled as "Public users".

3.2 To restrict access to a document to users with a username and password

B. At the collection level: if a collection is set to "Intranet viewers", there is no need to restrict the documents in that collection since all documents will inherit the collection's permissions.

C. At the document level: if a collection is set to "Public users", and you wish to restrict access to specific documents only from that collection, you may do so by assigning the documents in question to the group to which you want to make them accessible (ex: "Intranet viewers").

Scenarios	A.	B.	C.
Collection group	Public users	Intranet viewers	Public users
Document group	Public users	Public users	Intranet viewers

4.Adding a Decision

[12] To add a new decision, click on the Add new decision button. The "Add Decision" form will open.

Figure 8 – "Add Decision" form

1. Select the collection to which the decision should be added. The "Collection" field will not be visible if your Decisia installation only has one collection.

2. With a bilingual or multilingual Decisia installation, select the correct language tab and check the "Add document" box. The language specific metadata fields will become visible.

Figure 9 - Language specific metadata fields

3. Upload your decision's source file (Word, WPD, HTML or PDF) by using the "…" button or by dragging and dropping the file into the "Drop here" section.

4. If your Decisia installation uses the metadata extraction feature, click on the "Extract Metadata from the above file" button (see Figure 9). If not, proceed to the following step.

5. Manually fill in any metadata fields that require completion. Here are the different kinds of metadata fields you will find in the "Add Decision" and "Edit Decision" forms:

Types of metadata fields

Metadata Fields * indicates an obligatory field	**Field Type**

Case name*, Neutral citation and Report citation

Case name*

Figure 10- Short text input

File numbers and Other citations: Make sure to click on the "+" button once you've added information into the text field.

File numbers

Figure 11 - Multiple short text input

Representatives, Parties, Summary, Internal notes and 4 *ad hoc* text fields

Parties

Figure 12 - Text input

Notes :
Click the green button to see the HTM source and the red button to clear the field. Other rich text features will allow you to format the contents of the note (ex: font, alignment, etc.).

Notes

B *I* U x₂ x²   Background ▼ Foreground ▼ Font ▼ Size ▼
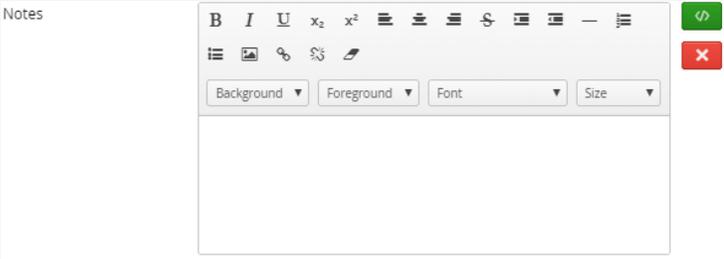
Figure 13 - Rich text input

Date*:
Can also be added in manually

Date*   YYYY-MM-DD

Figure 14 - Date-picker

Publication status*, Decision type, Decision status, Collection*, District, Publication status* and Announcement

Publication status*   Hold

Figure 15 - Single selection form list of values

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Decision-maker(s), Subjects, Laws and Groups: Either drag and drop options from the "Available" column into the "Selected" column or double-click on the desired options from any of these two columns.
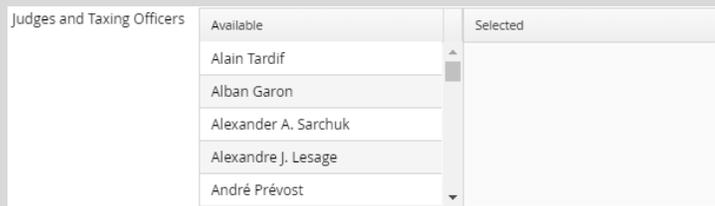
Figure 16 - Multiple selections from list of values

Relations: when you click on the + button de confirm the relation type chosen from the drop-down menu, the Search Decision form will appear. Search for the decision to be linked to the decision being added, select it from the Results table and click on Ok.
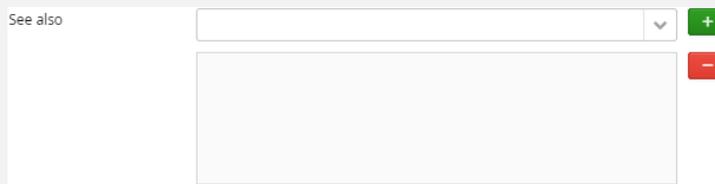
Figure 17 - Multiple selections from list of values + search in database

If any options for an existing metadata field are missing, please communicate with an Admin user who can create them for you.

For example, for the Decision-maker(s) metadata field, you may notice that a given decision-maker is not available to be assigned to a decision.

6. If you wish, you can use the "Preview" feature to visualize what a decision will look like on the website. Note that if your source file is a PDF, no preview will be generated. Also, the links in the Relations field are not functional in the preview.

7. Click on "Save" when you're done.

5. Editing a Decision

[13] You may want to edit a decision to update its source file or its metadata, or add its translation. To do so:

1. Use the search fields in the "Decisions" tab to find the decision in your Decisia database.

2. Select the decision to be edited. The "Edit Decision" form will open.

3. If you are working in a bilingual or multilingual Decisia administrative interface, make sure to select the correct language tab.

4. If you want to:

   a. Change the decision's source file: replace the current one by using the "…" button or the "Drop here" feature for the "Original document (Word, WPD, other)" field. Should you need to retrieve a previous version of a decision's source file, you can do so using the Decisia audit trail (see section 8).

   b. Add an HTML or PDF file that differs from the ones generated automatically by Decisia: replace the current HTML or PDF file by using the "…" button or the "Drop here" feature of the corresponding HTML or PDF fields.

   c. Update the decision's metadata: use the "Extract Metadata from the above file button" (if available in your Decisia installation) or manually update the desired metadata fields.

CAUTION: If you use the automatic extraction feature after having manually edited some of the information contained in the extracted field, these changes will be squashed.

5. Click on "Save" when you're done.

6. Deleting a Decision

[14] To delete a decision:

1. Use the search fields in the "Decisions" tab to find the decision in your Decisia database.

2. Select the decision to be deleted and click on the "Delete" button.

[15] If you have deleted a decision accidentally, you can retrieve its source file and its metadata with the Decisia audit trail (see section 8).

7. Using the Mailing List

[16] Decisia offers two different mailing lists: public and internal. If your Decisia installation is configured with these mailing lists, when adding or editing a decision, you will see the following check boxes. By default, they will be greyed out.

Send to internal mailing list ☑ *Decision never sent to mailing list

Send to public mailing list ☑ *Decision never sent to mailing list

Figure 18 – Mailing list check boxes

[17] To be able to send a decision via the public or internal mailing list, its publication status must be "Publish" and its group "Public users". To send a decision via the internal mailing list, its publication status must be set to "Publish" and its group "Intranet viewers".

[18] When adding a decision, setting its Publication status to "Publish" for the first time will automatically check off the "Send to internal mailing list and/or Send to public mailing list" check-boxes for you. Should you prefer to not send the decisions via one or both of these mailing lists, simply uncheck the check-boxes.

[19] The mailing lists are normally generated one time per day. They aggregate all of the decisions checked off for sending since the last mailing list was sent.

[20] After a decision has been sent via a mailing list, the appropriate "*Decision never sent to mailing list" message will be updated to indicate the day it was send.

[21] The mailing lists themselves provide links to the decisions included. To access an Intranet decision sent via the internal mailing list, click on its link in the mailing list and enter your login credentials when prompted.

Figure 19 – Email received via the mailing list

7.1 Using the Mailing List with the "Announcement" Field

[22] If your Decisia installation uses the "Announcement" field and you want to send a decision via a mailing list, the "Decision to appear as" drop-down menu must not be set to Unannounced. It must instead be set to "New decision", "Translated decision", or "Corrected decision".

8. Using the Audit Trail

[23] The Audit Trail function, accessible via the menu tab of the same name, lets you view the changes made within your Decisia database. In other words, it lets you view the history of a decision, resource or metadata option.

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Figure 20 – Decisia "Audit Trail"

[24] The "Audit Trail" search fields allow you to search by:

1. Modification made to: search by modified entity, that is to say by decisions, resources or metadata fields;

2. Modified by: search by Decisia user;

3. Modified between: search by date;

4. Type: search by type of action (ie. create, update, delete).

[25] You can also modify the number of results displayed on the Results pane ie. 10, 20, 50, or 100.

[26] The results displayed in the Results pane are revisions. A revision, which has its own unique ID number, is created every time the "Save" or "Delete" buttons are clicked.

[27] The image below shows that the user "Lexum Admin (elliotte)" updated documents 16499 and 16417 between 2017-01-01 and 2017-09-30.

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Figure 21 – Search via the "Audit Trail"

[28] Once you've found the decision you want to analyse, double-click on the decision or select it and click on the "View history" button. This will open the "History of" form.

8.1 Understanding a Document's History

[29] Here is an example of a decision's history:

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Figure 22 – Document's History

[30] Of note:

1. The "Modification Information" field provides information on the modification itself (date, time, type), as well as the user who made it.

2. The "Values" field provides information about the decisions modified ie. source files and associated metadata.

3. By default, only metadata fields that have been modified are displayed. Click on the "Show all fields" link to see all of the metadata fields.

4. Information added to a decision is indicated in green.

5. Information removed from a decision is struck through in red.

[31] In Figure 22, you can see that user elliotte:

1.   at 7:35 am on 2017-03-30, the user "Lexum Admin (elliotte)" added the decision in Decisia. The English and French source documents are .docx. The following metadata fields have been completed: Case name, Neutral Reference, Parties, Notes, Collection, On appeal from, Case number, Judges and Publication status. The mailing lists were not been checked off.

2.   At 9:45 am on the 2017-03-30, the user "Lexum Admin (elliotte)" changed the publication status of the decision to "Publish", assigned the group "Unrestricted" and checked the mailing list for sending.

3.   At 11:00 am on 2017-03-30, the decision was sent via the mailing list, the system (via the user "System User (system)") automatically unchecked the "Send to list public mailing list" field.

4.   The user "Lexum Admin (elliotte)" replaced the original files in English and French at 4:24 pm on 2017-03-30.

9. Modifying your Account Details

[32] You can update your first and last names, your email address, your login and your password via the "My Account" tab.

Figure 23 – Account details

[33] To do so, simply edit the corresponding field and hit Save.

[34] You'll notice that to update your password, there are two fields that need to be completed: "Password*" and "Password verification*". Both of these fields are blank because Lexum does not display Decisia passwords as a security measure.

10. Exporting Results into a File

[35] To easily view in an Excel file all of the metadata associated with a given selection of decisions, simply:

1. Search and find the desired decisions with the search fields in the "Decisions" tab;

2. Click on the "Exporting results into a file" button;

3. When asked "Are you sure you want to export all decisions from Results table?", click "Yes";

4. When the progress bar in the "Exporting results into a file" window indicates the processing is complete, click on the "Download exported file" link.

5. To finish, click "Close".

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[36] You can then open and consult the generated Excel file (named "export.xlsx") from where it was downloaded. You will notice that the Excel file contains a column for every metadata field activated in your Decisia installation. Any field that has not been populated will result in an empty cell in the exported Excel file.

11. Verifying your work on the website

[37] Once you've added, edited or deleted a decision in the administrative interface and wish to make sure that your changes have been duly reflected on the website, you can either:

1. Find the decision by browsing by Collection or Subject (browse by Date, by Case name, by Neutral citation, by Report citation), or by browsing via the "Recent additions" pages.

2. Find the decision via the search bar or by the "Advanced Search". Note that it can take up to five minutes for changes made in your Decisia database to be reflected in the search bar and "Advanced Search". This is because your Decisia installation's database is indexed every five minutes. It is this indexation that populates the search results.

12. FAQ

12.1 I would like to add a decision to Decisia but I do not yet have the source file. Is this possible?

[38] Yes, you can indeed add a decision that does not contain a source file. To do so, follow the instructions provided above in section 4 Adding a Decision, but skip steps no. 2 and 3. Decisia will automatically generate and display the message "There is no document available for this decision" where the decision would normally be displayed.

[39] When you obtain the source file, follow the instructions in section 5 Editing a Decision.

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12.2 The appearance of the decision I just added is not satisfactory on the website. What can I do to fix the problem?

[40] First off, Decisia's output can only be as good as what you input into it. If best editing practices are not used to prepare your decision (ex: paragraph alignment, indentation or spacing has been prepared by typing the Enter, Space or Tab keys as many times as need to obtain the preferred visual effect, as opposed to defining these characteristics in your Word template or with the Word alignment and spacing parameters in the Ms-Word Style ribbon or task pane), it can be expected that the display of the decision on the website will be negatively affected.

[41] If ever you notice a display problem on the website that you don't see in your original Word document, please save your Word document in HTML (use the "Web page, filtered" option if your Decisia installation does not use WCAG filters; use the "Web page" option if your Decisia installation uses WCAG filters).

[42] Does the display problem show up in the HTML version of your source Word document? If so, the problem must be addressed directly in your Word document. Examine the styles applied to the problematic portion of the decision. Does it have any characteristics that could explain the problem?

[43] Once the HTML generated by Word is satisfactory, resubmit the Word document into Decisia. If the decision is still being incorrectly displayed on the website, communicate with Lexum's support services.

12.3 I've just added a decision but can't find it in the Recent Additions list on the Home page. How come?

[44] The list of "Recent Additions" on the Home page displays the 5 most recent decisions in your Decisia database based on their date, as opposed to their publication date. If the decision in question is older than five other decisions published earlier in your database, it will not show up in the "Recent Additions" list.

12.4 I'm adding a French decision but all of the metadata options in the Add decision form are in English. How come?

[45] When you are logged into the administrative interface in English, all of the information presented to you will be in English. Inversely, if you are logged into the administrative interface in French, all of the information presented to you will be in French.

[46] On the website, the metadata information will none the less be presented in the language of the page being consulted.

13. Additional Information

[47] Every Decisia customer has access to support services, Monday to Friday, 9am to 5pm, EST.

[48] If you have any questions or require assistance, please communicate with Lexum's support services at support@lexum.com, 514.316.2100 or 1.855.316.2100.

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