



Using the Qweri Administrative Interface

v. 1.14

November 2016

1. Getting Started

[1] Qweri is supported by the most recent versions of Chrome, Firefox and Safari Mobile, as well as Internet Explorer 11. Make sure you're using one of these browsers when using all of Qweri's interfaces.

[2] The Qweri administrative interface is displayed in English or French, depending on your browser's language settings. Changing your browser's language will change the language of your Qweri administrative interface.

[3] Lexum will provide you with the URL of your Qweri administrative interface, as well as create an initial Admin user account. This first Admin user can create additional user accounts, Admin or not, as required (see [section 2.2.3 Users](#)).

1.1 Getting a Qweri Admin User Account

[4] To obtain an Admin user account, you'll have to provide your full name and email address to an existing Admin user.

[5] The existing Admin user will create your Admin user account, and either (1) provide you with your password or (2) send an email providing you with a link to the Select a new password page so you can create and confirm your own password.

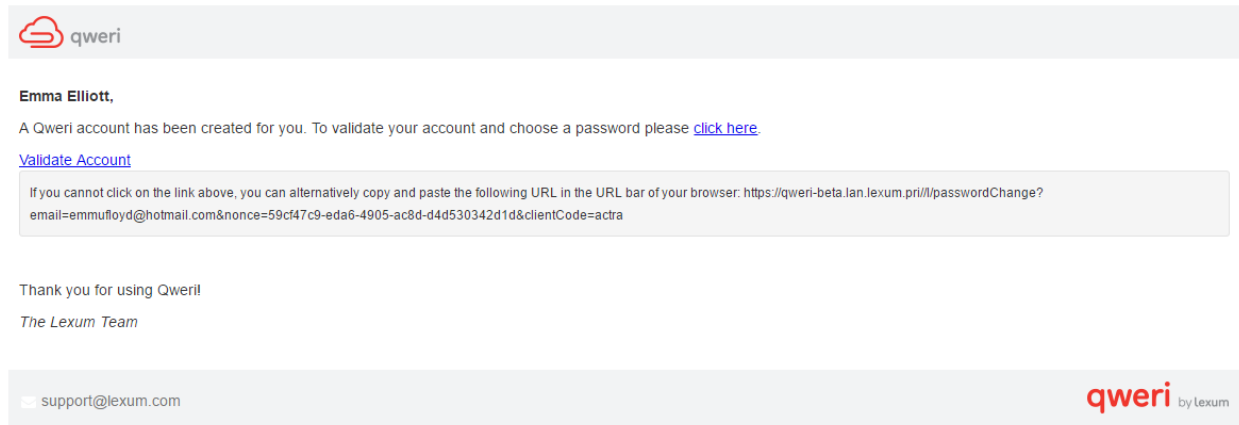


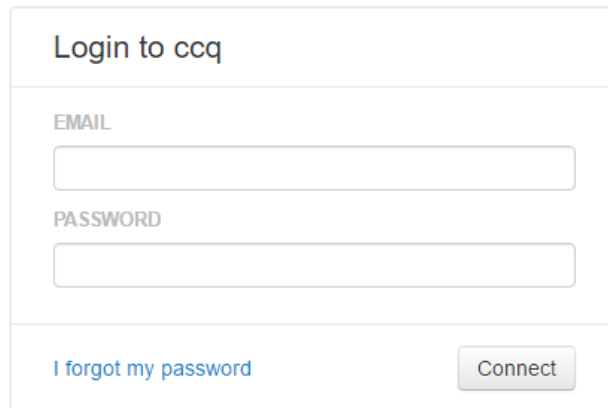
Figure 1 - Account validation email

The image shows a web form titled "Select a new password". Below the title, it says "Please enter a new password for [emmufloyd@hotmail.com]". There are two input fields: "NEW PASSWORD" and "CONFIRM". Each field has a small eye icon to its right, likely for toggling password visibility. At the bottom right of the form is an "Ok" button.

Figure 2 - Select new password page

1.2 Logging Into the Administrative Interface

[6] With the URL provided by Lexum, you'll be able to access your Qweri administrative interface's login page where you'll be asked to provide your email account and password.



Login to ccq

EMAIL

PASSWORD

[I forgot my password](#)

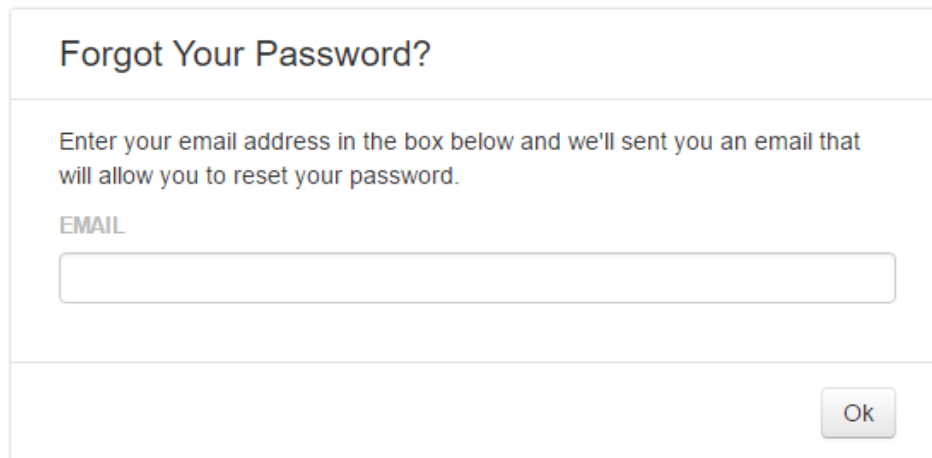
Figure 3 - Login page

1.2.1 Forgotten Password

[7] Should you forget your password, you can either generate a new one for yourself, or ask another Admin user to assist you.

1.2.1.1 *Generating a New Password Yourself*

[8] To automatically generate a new Qweri password, click on the I forgot my password link on the login page (see [Figure 3](#)). You'll be asked to provide the email address associated to your Qweri user account on the Forgot Your Password? page. After you click on Ok, you'll receive confirmation that the email was successfully sent.



Forgot Your Password?

Enter your email address in the box below and we'll sent you an email that will allow you to reset your password.

EMAIL

Ok

Figure 4 - Forgot Your Password? page

An email allowing you to reset your password was sent to emmufloyd@hotmail.com.

Figure 5 - Password reset confirmation message

[9] You'll receive a password reset email that will allow you to access the Select a new password page (see [Figure 2](#)) where you'll be able to choose and confirm your new password.

[10] Once your new password is confirmed, you will be automatically connected to Qweri.

1.2.1.2 Generating a New Password with Admin Assistance

[11] Alternatively, you can also ask another Admin user to access your user account in the Qweri administrative interface, and send you the password reset email described above. You'll select and confirm your new password via the same Select a new password page (see [Figure 2](#)).

2. The Qweri Administrative Interface

2.1 Admin User Drop-down

[12] By clicking on your user name in the upper right corner of the administrative interface, you will access a drop-down menu allowing you to perform the following actions:

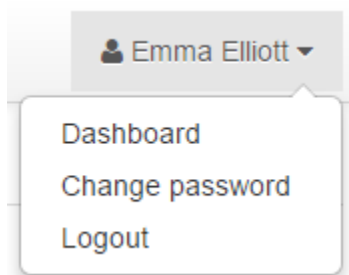


Figure 6 - User drop-down menu

1. **Dashboard:** Access the Dashboard of your Qweri installation (see [section 2 Using the Qweri Dashboard](#) of the User interface guide). When you're in the user interface, you'll instead see Administration to return back to the administrative interface.
2. **Change password:** Update your current password with the "Change Password" pop-up. Simply provide your current password, enter and confirm your new password and click on the "Change password" button.

 A screenshot of a "Change Password" pop-up form. The form has a title "Change Password" at the top. Below the title are three input fields: "Current password" (with a visibility icon), "New password" (with a strength indicator icon), and "Confirm password" (with a strength indicator icon). At the bottom right, there are two buttons: "Cancel" and "Change password".

Figure 7 - Change Password pop-up

3. **Logout:** Sign out of Qweri.

2.2 Main Features of the Qweri Administrative Interface

[13] The Qweri administrative interface is made up of 5 different sections: Documents, Groups, Users, Metadata and Settings. You can navigate between the different sections by clicking on the corresponding tab.

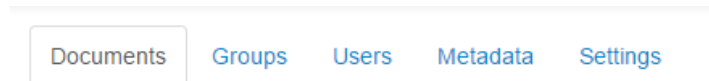


Figure 8 - Administrative interface sections

[14] Changes made in the Qweri administrative interface, no matter what section you're in, are saved automatically.

[15] You will be advised of the success or failure of a change via a text box at the top right hand corner of a given section. For example, when creating and updating a document in the Documents tab, you may see one of the following messages above the Title field (see [section 2.2.1 Documents](#)):

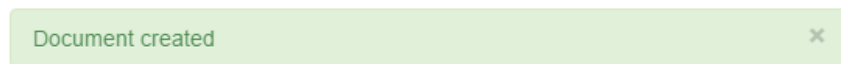


Figure 9 - Document creation success message

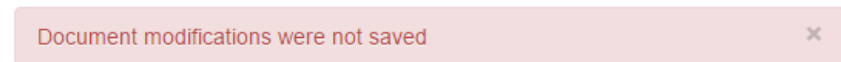


Figure 10 - Document update failure message

2.2.1 Documents Section

[16] The Documents section lets you add, update and delete documents from your Qweri installation.

The screenshot shows the 'qweri Administrator | userguides' interface. At the top, there are navigation tabs for 'Documents', 'Groups', 'Users', 'Metadata', and 'Settings'. A search bar is located below the tabs. On the left, a list of documents is displayed, with the selected item 'Using the Qweri Administrative Interface' highlighted in blue. Below the list are '+ Add' and 'Delete' buttons. On the right, the details for the selected document are shown, including fields for Title, Product Number, URL, Language, Access Permissions, User Membership, and Group Membership. At the bottom right, there is a 'File information' section with upload details and a 'Document Access' section with download options. A dashed box indicates a file upload area.

1 final user guide qweri en
DOC1

2 user guide fr qweri
DOC2

Using the Decisia Administrative Interface (fr)
DecisiaEditors

3 Using the Qweri Administrative Interface
QweriAdminInterface

Using the Qweri User Interface
QweriUserInterface

Utiliser l'Interface Administrative Qweri
QweriInterfaceAdmins

Utiliser l'Interface Usager Qweri
QweriInterfaceUsager

4 Title **4.a**
Using the Qweri Administrative Interface

Product Number **4.b**
QweriAdminInterface

URL: <https://qweri-beta.lan.lexum.pri/w/userguides/QweriAdminInterface> **4.c**

4.d Add metadata

Language **4.e**
English

Access Permissions **4.f**

Disabled

Public

Visible to:

User Membership **4.g**

Group Membership **4.h**

File information **4.g**

- Uploaded at 2016-11-09 @ 11:55 AM
- 16 pages 24 headings

Document Access **4.h**

- Original document
- Qweri
- PDF
 - Allow download
- ePub
 - Allow download

Click here or...
Drag file here to update

Figure 11 - Documents section

[17] In the left-hand menu, you'll see:

- The list of all the documents published in your administrative interface. Each list item displays the document's title, product number and a logo representing its access permission (see [section 4. f. Access Permissions](#)). The item selected will be highlighted in blue.

2. The search bar lets you quickly search within document titles and product numbers to locate a given document. The list of documents in the left hand menu will be narrowed down as you type in your search terms.

3. The Add and Delete buttons let you create new documents or remove existing ones.

[18] In the right-hand side of the Documents section, you can manage all metadata and options associated to a given document, as well as your document source files:

4. You will find the following fields:

a. **Title:** A document's title is displayed in its user interface header. Documents can be searched for by title in the administrative interface, as well as in the dashboard of the user interface.

b. **Product Number:** A product number is a unique combination of letters and digits that identifies a document. It can contain periods and hyphens. A default product number, with a format DOC#, is assigned to each document. It is wise to avoid changing a product number once the document is in use because the product number is used to create the document's URL. The product number is case sensitive.

c. **URL:** This is the URL to access the document online in the user interface.

d. **Add metadata button:** When additional metadata fields have been created in the Metadata section, they can be assigned to an individual document with the Add metadata button (see [2.2.4 Metadata Section](#)).

e. **Language:** A document can be set to English or French. This field helps optimize Qweri's search engine for each individual document.

f. **Access Permissions:** A document's access permissions are set by selecting the desired radio button:



Disabled:

Only Admin users logged into Qweri can access Disabled documents.



Public:

Public documents can be accessed by anyone who has a document's URL, no need to be logged into Qweri.

When a document is set to Public, a checkbox will appear that makes it possible to allow the document to be indexed by web search engines.

Allowing a document to be indexed means that it can appear as a Google search result, or that of any other search engine.



Visible to:

Documents can be made visible to restricted sets of users or groups of users via the User Membership and Group Membership fields respectively. These users must be logged into Qweri to access their documents.

When the Visible to option is selected, the User Membership and Group Membership fields will be enabled and no longer grayed out. Place your cursor in a field and select one or many users or groups from the drop-down list provided (see [2.2.2 Groups Section](#) and [2.2.3 Users Section](#)).

g. **File Information:** File information lets Admins see when a document was last updated, as well as how many pages and headings it contains. It is also here that Admins can upload a document, either by dragging and dropping the file into the Drag file here to update section, or by using the Click here functionality and selecting the file from wherever it's stored.

h. **Document Access:** All of a document's formats can be accessed via the links in the section of the Document's tab. More specifically:

Original document:
Qweri:

Download the Word document that is published in Qweri.
Access the HTML version of the document in the user interface.

PDF and ePub: Download the PDF and ePub formats generated from the

original Word document.

The Allow download checkbox allows you to make these versions of a document available or not for download in the user interface (see [section 3.5 More](#) of the user interface guide).

2.2.1.1 Adding a New Document

[19] To add a new document:

1. Click on the Add button and a new Untitled document with a default Product Number will be created;
2. Provide a title to the document and personalize the product number if desired;
3. If metadata fields have been created for your Qweri installation, you can click on the Add metadata button and choose the desired field from the Select a metadata drop-down:

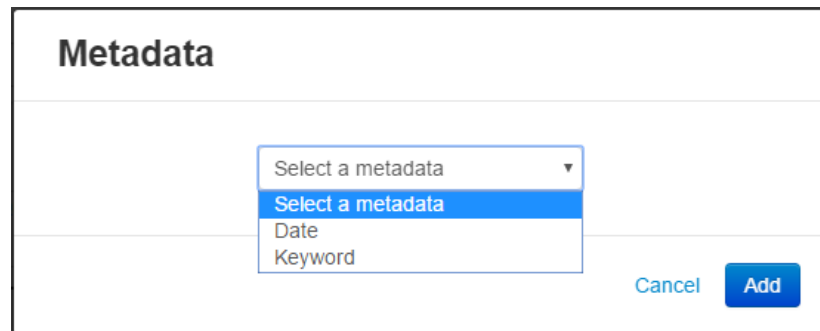


Figure 12 - Metadata drop-down

- a. Date type metadata: When a date type metadata is selected, a date picker calendar will appear so that you can choose a date.
- b. String type metadata: When a string type metadata is chosen, a text field will appear.

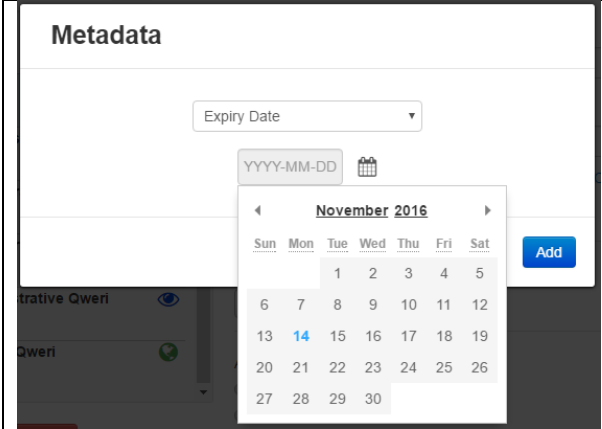


Figure 13 - Metadata date picker

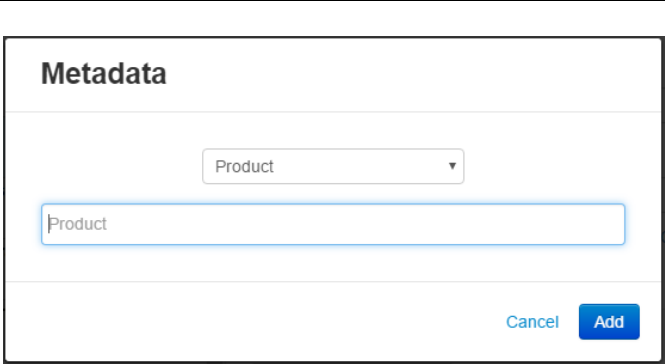


Figure 14 - Text field for string type metadata

The metadata added to the document will appear above the Add metadata button and can be deleted by clicking on the red crosses. If necessary, a security pop-up will ask you to confirm their definitive deletion.



Figure 15 - Date and string metadata added to a document

- 4. Set your document language to English or French;
- 5. Select the desired Access Permissions, as well as indexation option for Public documents, by clicking on the corresponding radio-button. To make the document accessible to certain users and groups, select the Visible to radio button. Then select the desired users and groups from their respective drop-down menus. When you have completed your selection, set your document back to Public if need be.

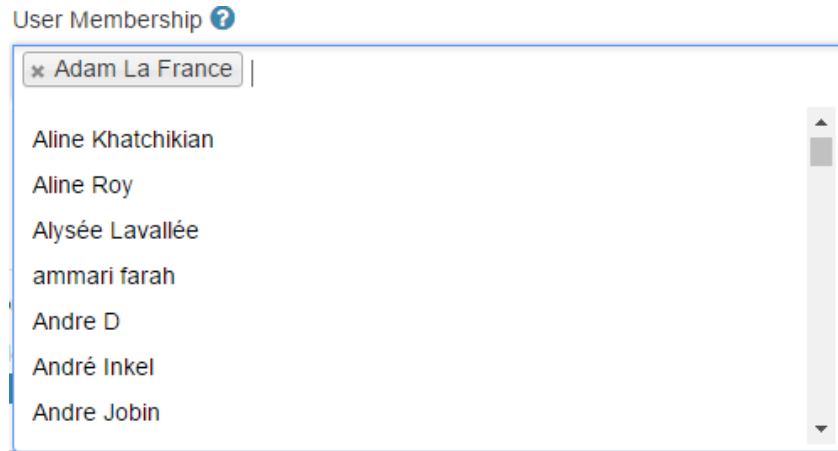


Figure 16 - User Membership drop-down

6. Upload your Word document. An Upload in progress... pop-up will appear;

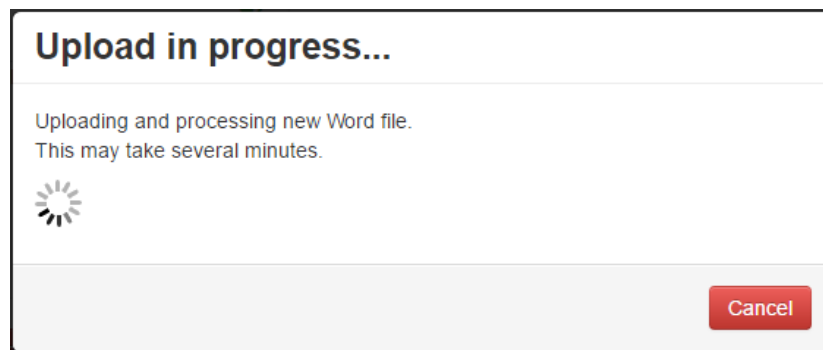


Figure 17 - Upload in progress pop-up

7. When the upload is complete, choose whether or not you want the document's PDF and ePub to be offered to users in the user interface.

2.2.1.2 *Editing a Document*

[20] To Edit an existing document:

1. Select it from the list of available documents and update any of the fields as desired in the left-hand side.
2. To replace your Word document with a more recent version, use the Click here or drag/drop functionalities like when you first uploaded the document.

2.2.1.3 Deleting a Document

[21] To delete a document, select it from the list of available documents and click on the Delete button. When asked if you are sure that you want to delete the document, choose Yes.

2.2.2 Groups Section

[22] The Group section lets you manage groups, including their creation, update and deletion.

qweri Administrator | userguides Clementine Testemale ▾

Documents Groups **Users** Metadata Settings

Groups allow you to define specific categories of users (e.g. Internal Staff, Subscribers to all Tort Books, etc.) and join them to specific documents (e.g. A History of Tort Reform, Alabama Tort Handbook, Tort Procedure in the United States, etc.). Groups allow you to manage large amounts of users and documents.

1 Groupe A

Group Name **3.a**

Members of this Group **3.b**

Document Access Permissions **3.c**

2

Figure 18 - Groups section

[23] In the left-hand menu, you'll see:

1. The list of all the groups created in a Qweri installation. A selected group will be highlighted in blue.
2. The Add and Delete buttons let you create new groups and remove existing ones.

[24] In the right-hand side of the Groups section, you can define what users and documents are assigned to a given group:

3. You will find three different fields:
 - a. Group Name: Assign a name to a group with this field.
 - b. Members of this Group: It is here that users can be added as members of a given group.
 - c. Document Access Permissions: This field allows you to make documents accessible to a given group. Members of a same group will be able to share notes (see section [3.3.4 Shared Notes](#) of the user interface guide).

2.2.2.1 Adding a New Group

[25] To add a new group:

1. Click on the Add button and assign a name to the group you want to create and click on Ok;

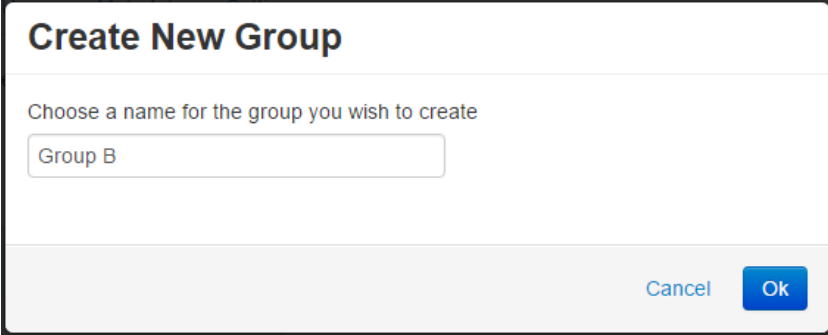


Figure 19 - Add a new group

2. Select users to be added to the newly created group as well as documents to be accessed by members of this group using the dedicated drop-down menus.

Members of this Group [?](#)

✕ Clémentine Testemale ✕ Emma Elliott

Document Access Permissions [?](#)

|

DOC1 — final user guide qweri en

DOC2 — user guide fr qweri

DecisiaEditors — Using the Decisia Administrative Interface (for Editors)

QweriAdminInterface — Using the Qweri Administrative Interface

QweriUserInterface — Using the Qweri User Interface

QweriInterfaceAdmins — Utiliser l'Interface Administrative Qweri

QweriInterfaceUsager — Utiliser l'Interface Usager Qweri

Figure 20 - Add users and documents to a group

2.2.2.2 *Editing a Group*

[26] To edit an existing group, select it from the list of groups available and edit the desired fields on the right-hand side.

2.2.2.3 *Deleting a Group*

[27] To delete a group, select it from the list of groups available and click on the Delete button. When asked if you are sure that you want to delete the document, choose Yes.

2.2.3 Users Section

[28] The Users section lets you create, update and delete users (regular users or Admins).

The screenshot shows the 'Users' section of the qweri Administrator interface. On the left, a list of users is displayed, with the first user, Clementine Testemale, highlighted in blue and marked with an orange cog icon. Below the list are '+ Add' and 'Delete' buttons. On the right, a form allows for editing a user's account details, including Email, Full Name, Group Membership, Document Access Permissions, Account Disabled, and Has Access to this Administrative Interface. There are also buttons for '+ Add', 'Delete', and 'Reset user password'.

Figure 21 – Users section

[29] In the left-hand menu, you'll see:

1. The list of all users. Each list item displays the user's name and email address. An orange cog logo indicates when a user is an Admin. Items selected are highlighted in blue.
2. The search bar lets you quickly search amongst your users. The list of users in the left hand menu will be narrowed down as you type in your search terms.
3. The Add and Delete buttons let you create new users or remove existing ones. When a user is deleted, any annotations shared with a group are lost.

[30] In the right-hand side, you can manage users' accounts via the following fields:

4. Email: A user's email address is entered into this field;
5. Full Name: This field accommodates a user's full name;

6. **Group Membership:** A user can be assigned to a group via this field. When a user has already been added to a group via the Groups section, this field is automatically filled;
7. **Document Access Permissions:** This field allows Admins to make documents accessible to a given user. When a user has already been added to a group having access to specific documents, this field is automatically filled;
8. **Account Disabled:** When the "Account Disabled" check-box is selected, a user will no longer be able to log into Qweri. If a user shared notes with members of a group, the notes will remain accessible to the other group members;
9. **Has Access to this Administrative Interface:** Checking off the Has Access to this Administrative Interface check-box will make a user an Admin;
10. **Reset user password:** The "Reset user password" link lets you send a user a reset password email (see [section 1.2.1.2 Generating a New Password with Admin Assistance](#)).

2.2.3.1 Adding a New User

[31] To add a new user:

1. Click on the Add button and enter the email address and full name of the Qweri user you want to add.
2. You can either send an automatic email to the user you are adding for them to validate their account and set-up their own password, or create a password for them.

Figure 22 - Create a new user

2.2.3.2 Editing a User

[32] To edit an existing user, select them via the list of available users and edit the desired fields and checkboxes in the right-hand side.

2.2.3.3 Deleting a User

[33] To delete a user, select them from the list of available users and click on the Delete button. When asked if you are sure that you want to delete the user, choose Yes.

2.2.4 Metadata Section

[34] Qweri lets you create personalized metadata fields that can be assigned to your documents. The metadata section lets you create, edit and delete these metadata fields.

[35] Two different types of metadata fields can be created: date and string. A date type metadata field lets you assign a date to a document, whereas a string type metadata lets you add full text information to a document.

Id	English Label	French Label	Type
1281	Expiry Date	Date d'expiration	DATE
1282	Product	Produit	STRING

+ Add

Figure 23 - Metadata section

[36] Filters for these metadata fields can be added to your Qweri Dashboard. Lexum must activate these filters for you, so communicate with Lexum's support team when you are ready to active your metadata filters:

Filters

Date 1. a.

between YYYY-MM-DD 📅
and YYYY-MM-DD 📅

Date 2. a.

YYYY-MM-DD 📅

Keyword 3

Figure 24 - Metadata filters display on the Qweri Dashboard

1. Date type metadata: Two possible filters exist for date type metadata fields, that is to say:
 - a. a date range filter: locate documents with a date falling in between a selected date range;
 - b. an exact date filter: locate documents by an exact date.
2. String type metadata: Only one type of filter exists for string type metadata fields, a full text filter that lets you

locate documents based on a full text search of the content in a given string type metadata field.

2.2.4.1 Adding a New Metadata Field

[37] To create a new metadata field:

1. Click on the Add button and choose the desired metadata field type via the drop-down menu;
2. Add the English and French labels for the metadata field and click save.

Figure 25 – Add a new metadata field

2.2.4.2 Editing a Metadata Field

[38] To edit a metadata field, click on the grey editing button (



) for the field you wish to modify. This will open the “Create/Edit Meta” pop-up (see [Figure 25](#)).

2.2.4.3 Deleting a Metadata Field

[39] To delete an existing metadata field, click on the red delete



button () from the field you wish to delete. When asked if you are sure that you want to delete the metadata field, choose Yes.

2.2.5 Settings Section

[40] The Settings sections lets you enable or disable the annotation and sign up features.

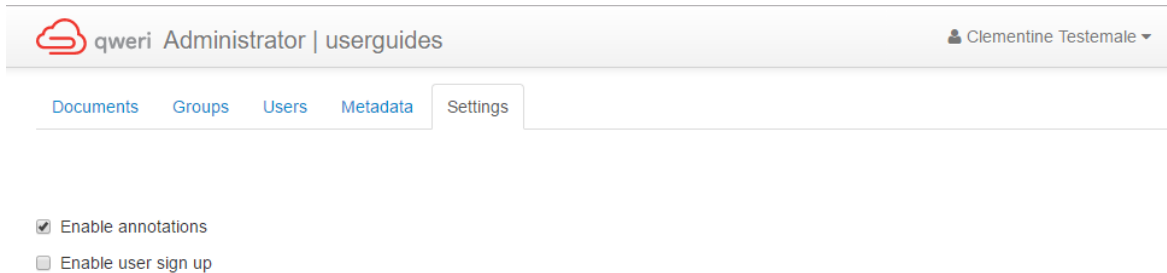


Figure 26 - Settings section

1. Enable annotations: When this check box is checked off, users can make use of Qweri's annotation feature (see section [3.3 Notes](#) of the user interface guide);
2. Enable user sign up: When this checkbox is selected, users can create an account without the intervention of an Admin user (see section [1.1.1 Qweri Installations Allowing Users to Create their Own Accounts](#) of the user interface guide).

2.2.5.1 Annotations

[41] You can find about Qweri's annotation feature in section [3.3 Notes](#) of the user interface guide.

[42] The only particularity when it comes to annotations and Admin users is the possibility of creating a public note.

[43] Admin users can check off the Public check box at the bottom of the Note widget. A public note can be seen by everyone: public users not logged into Qweri, other Admins, and ordinary users logged into Qweri.

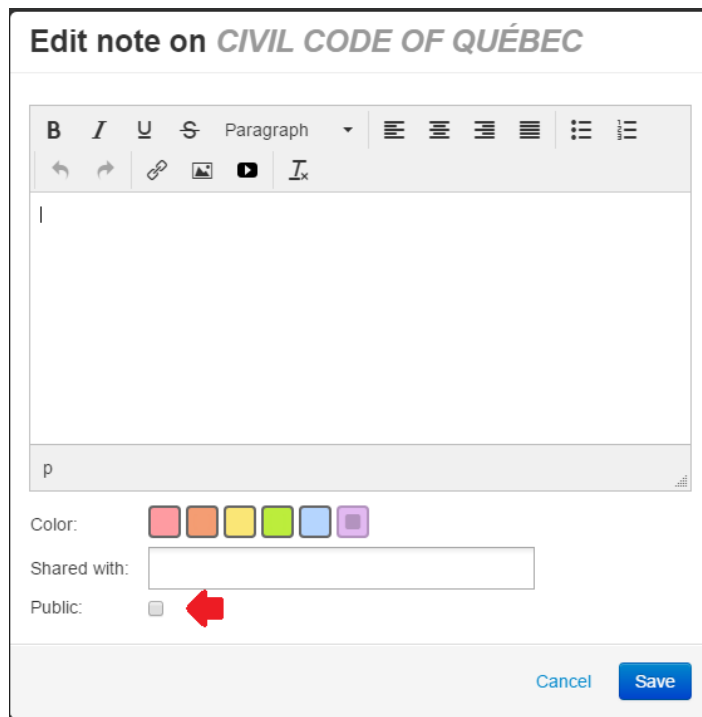


Figure 27 - Public check box

[44] Except for the Admin who created it, a public note will always appear in light blue. In the left hand Notes tab of the user interface, the note will have the shared logo.

2.2.5.2 Sign Up

[45] For more information on the sign up feature, please refer to section [1.1.1 Qweri Installations Allowing Users to Create their Own Accounts](#) of the user interface guide.

[46] When a user creates a Qweri account for themselves, not only can they consult your public documents as before, but can also add personal notes to them (if the annotation feature is enabled). To access documents set to Visible to, and to share notes with a group, an Admin user will have to set this new users access permissions via the administrative interface.

3. Additional Information

[47] Every Qweri customer has access to support services, Monday to Friday, 9 a.m. to 5 p.m. (EST). If you have any questions or require assistance, please communicate with Lexum's support services at support@lexum.com, 514.316.2114 or 1.855.316.2100.