



Docucomp User Manual

Production Version 4.6.0

Table of Contents

Contact Information	
Acknowledgements	1
Overview	1
Helpful Quickfacts	1
Limited Access	2
Filter & Search Components	2
Components List	3
New Users	4
Log In for Full Access	4
Viewing Options	6
Dark Mode	6
Streamline Page	7
Link to Docucomp User Guide	7
Filter & Search Components	8
Components List	8
Actions	10
View Component	10
Edit Component	11
Copy Xlink	11
View Revision History	12
Compare Two Versions	12
View Component's XML from Revision History Page	14
Undo a Change By Reverting To Prior Version	15
View XML	16
Delete this component	16
Component Tools	17
Create New Component	17
ISO XML Snippet	20
Components	21
Insert Components into CoMET's ISO Editor	22

Insert Component into ISO Editor	22
Use ISO Editor to Modify Point of Contact XML Component	28
View Components in XML	31
Change Log	33

Contact Information

Questions or feedback regarding this manual should be directed to the OneStop Metadata Content Team (lori.hager@noaa.gov, catherine.luquire@noaa.gov, paul.lemieux@noaa.gov)

If you encounter issues or need to report a bug in Docucomp, please email ncei.collection-manager.support@noaa.gov. In the email, describe the issue or bug and steps required to replicate it. Additionally, provide your name and contact information if you wish to be contacted for issue clarification and/or to receive updates on the status of the issue.

Acknowledgements

Special thanks to Charlie Burris, Jerri Reeves, and Marty Aubrey for their technical input

Overview

The purpose of Docucomp is to save users' time and promote reusability. If users need to create multiple metadata records with the same data content, they can create XML components in Docucomp and directly import the components into their XML or metadata records in CoMET as Xlinks. This manual demonstrates how to create and edit XML components and component groups, and how to insert XML components as Xlinks into metadata records using CoMET ISO Editor.

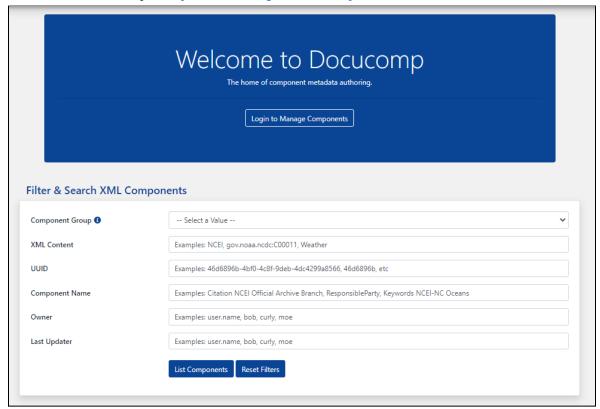
Helpful Quickfacts

- 1. An XML component is a snippet of ISO 19139 XML (see page 9 of link)
- 2. Components are inserted into metadata records via Xlinks
- 3. Xlinks are used to create hyperlinks in XML documents
- 4. Component Groups are used to group related components together. Editors can create and manage components within their own groups
- 5. If a user updates an in-use XML Component, the user must republish records in CoMET OR run a WAF on-demand in Metaserver

Limited Access

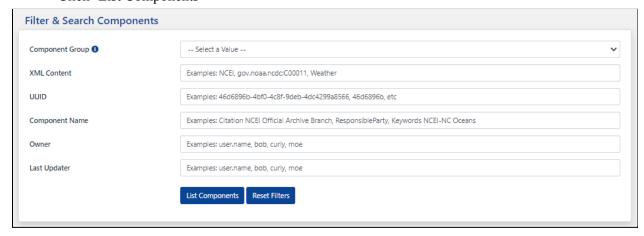
Some functions may be accessed without logging in

Access Docucomp at https://data.noaa.gov/Docucomp/

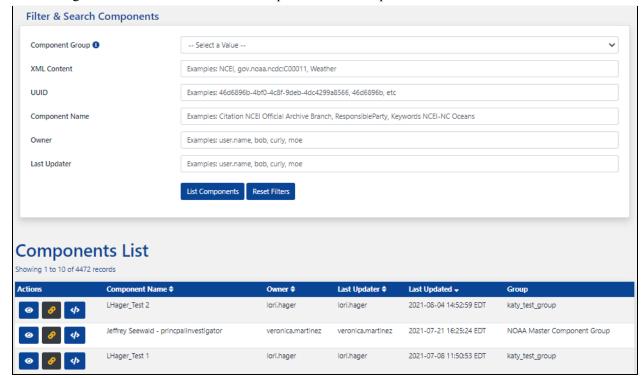


Filter & Search Components

- Apply filter(s), if desired
- Click 'List Components'



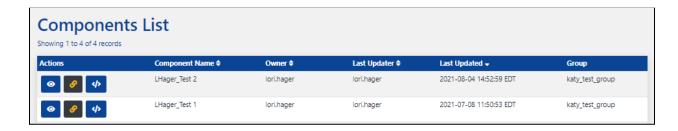
• Page loads with Filter & Search Components and Components List



Components List

Actions

- View Component
- Copy Xlink
- View XML



New Users

Note: If a NOAA employee, manager must request access

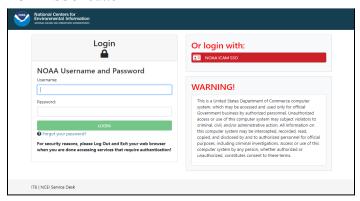
- Email: ncei.collection-manager.support@noaa.gov
- Subject:
 - New User for Docucomp for *employee name*
- Body:
 - o Employee's Contact information
 - Associated program or agency
 - Component Group(s) to be accessed
 - If Component Group is unknown, user will be assigned to default Component Group 'NOAA Master Component Group'
 - User may create/edit components here until appropriate Component Group is determined
 - Intended usage
 - Include if ability to create Component Groups is required
 - New users will be assigned default user role ROLE EDIT

Log In for Full Access

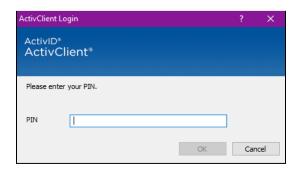
- Access Docucomp at https://data.noaa.gov/Docucomp/
- Select 'Login to Manage Components'



 Enter Username (email address without @noaa.gov) and email password OR click 'NOAA ICAM SSO' button



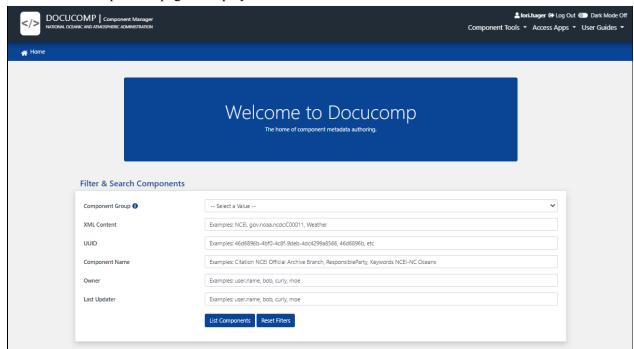
- 'Select a certificate', if prompted
 - Select same certificate used when logging into work computer
- Enter CAC PIN



- After authentication, a Warning page is displayed
 - Click 'Accept' to proceed



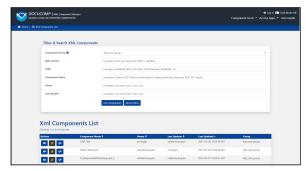
• Docucomp Home page is displayed



Viewing Options

Dark Mode

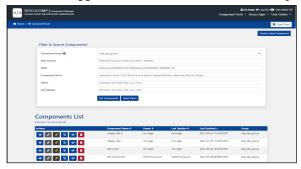
- Toggle button for 'Dark Mode' at top right corner of screen
 - o 'Dark Mode On' or 'Dark Mode Off'





Streamline Page

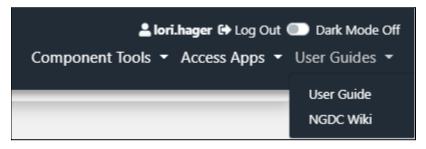
- Click 'Close Filters'
 - o Toggle between 'Close Filters' and 'Open Filters'





Link to Docucomp User Guide

- At top right corner, click 'User Guides' drop-down
 - o Select 'User Guide'

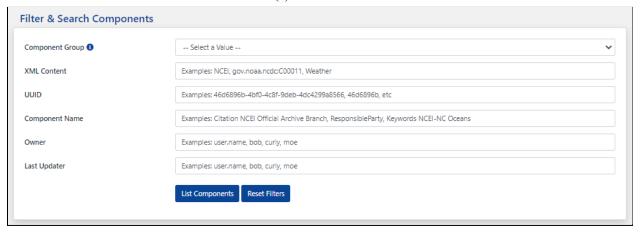


- Metadata site opens in new tab
 - o Below RESOURCES, click link 'Docucomp User Guide'

RESOURCES • Docucomp User Guide

Filter & Search Components

- Filter panel allows limiting number of components by various criteria
 - Filter components by:
 - Component Group
 - XML Content
 - UUID
 - Automatically generated or use own from XML
 - Component Name
 - Owner
 - Last Updater
 - Click 'List Components' to apply filter(s)
 - Click 'Reset Filters' to clear filter(s)



Components List

Actions

- View Component
- Edit Component
- Copy Xlink
- View Revision History
- View XML
- Delete this component



Actions



View Component

- Click eye icon to View Component
 - o 'Show Component' tab opens

Show Component

Component Name: LHager_Test 2
Component Group: katy_test_group

Owner: lori.hager

Date Created: 2021-08-04 14:52:59.374

Last Updated By: lori.hager

Last Updated: 2021-08-04 14:52:59.374

UUID: 841963ec-b219-4d75-9f70-34f0c5a362cc

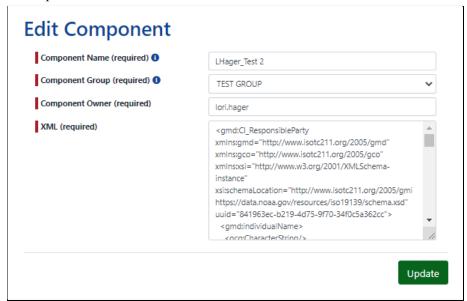
XML

```
<gmd:CI_ResponsibleParty xmlns:gmd="http://www.isotc211.org/2005/gmd" xmlns:gco="http://www.isotc211.org/2005/gmd" xmlns:gco="http://www.isotc211.org/2
             <gco:CharacterString/>
      </gmd:individualName>
      <gmd:organisationName>
             <gco:CharacterString/>
      </gmd:organisationName>
      <gmd:positionName>
             <gco:CharacterString/>
      </gmd:positionName>
       <gmd:contactInfo>
              <gmd:CI_Contact>
                     <gmd:phone>
                            <gmd:CI_Telephone>
                                   <gmd:voice>
                                           <gco:CharacterString/>
                                   </gmd:voice>
                             </gmd:CI_Telephone>
                      </gmd:phone>
                      <gmd:address>
                             <gmd:CI_Address>
                                    <gmd:deliveryPoint>
                                           <gco:CharacterString/>
                                    </gmd:deliveryPoint>
                                     <gmd:city>
                                           <gco:CharacterString/>
                                    </gnd:city>
                                      <gmd:administrativeArea>
                                           <gco:CharacterString/>
                                     </gmd:administrativeArea>
                                     <gmd:postalCode>
                                             <gco:CharacterString/>
                                     </gnd:postalCode>
                                      <gmd:country>
```

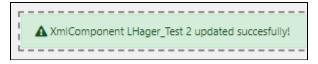


Edit Component

- Click pencil icon to Edit Component
 - 'Edit Component' tab opens
 - Apply edits
 - o Click 'Update'



• Get message 'XmlComponent . . . updated successfully!' message



- If user inserts poorly formed XML, a new tab opens with red 'Failed to save component group ... XML is not well formed' message
 - Changes will not be saved





Copy Xlink

- Click link icon to Copy Xlink
 - Get message 'Docucomp Xlink copied to clipboard successfully!'

Docucomp **Xlink** copied to clipboard successfully!

Note: Only use Copy Xlink functionality when injecting component directly into XML

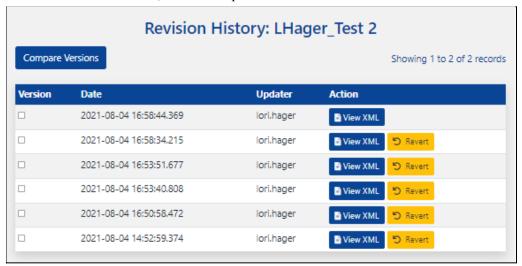
Not recommended to use this functionality when inserting Xlinks into CoMET via ISO Editor

For instructions on inserting Xlinks into CoMET's ISO Editor, click here



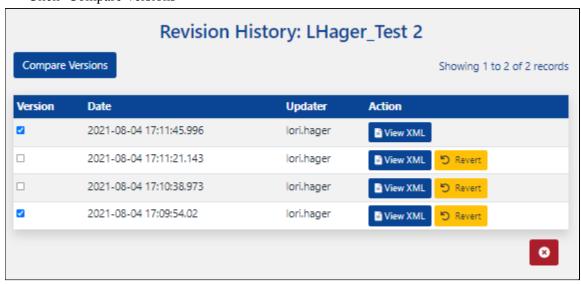
View Revision History

- Click revert icon to View Revision History
- Each time a record is saved, Date and Updater are noted

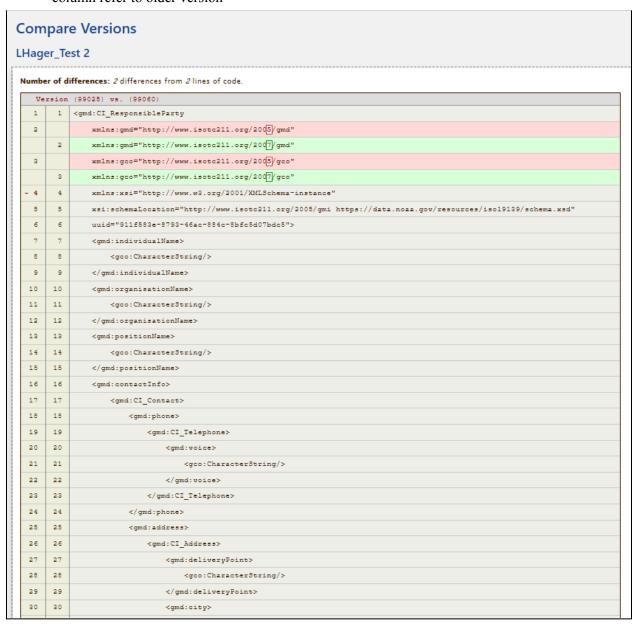


Compare Two Versions

- Check Version boxes of records to be compared
 - Clicking red 'X' in bottom right corner will deselect Version box
- Click 'Compare Versions'



• Below 'Version', numbers in left column refer to more recent version and numbers in right column refer to older version



View Component's XML from Revision History Page

- Action
 - Click 'View XML'



XML for selected component opens in new tab

```
This XML file does not appear to have any style information associated with it. The document tree is shown below.
T<gmd:CI_ResponsibleParty xmlns:gmd="http://www.isotc211.org/2005/gmd" xmlns:gco="http://www.isotc211.org/2005/gco"
xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:schemaLocation="http://www.isotc211.org/2005/gmi
https://data.noaa.gov/resources/iso19139/schema.xsd" uuid="c494dea3-eda4-4898-bbff-5a2438576fb3">
  ▼ <gmd:individualName>
    <gco:CharacterString> OMCE_team_test </gco:CharacterString>
</gmd:individualName>
  v<gmd:organisationName>
  <gco:CharacterString> NOAA </gco:CharacterString>
  </gmd:organisationName>
▼<gmd:positionName>
      <gco:CharacterString> Metadata Specialist </gco:CharacterString>
    </gmd:positionName>
  ▼ <gmd:contactInfo>
▼ <gmd:CI_Contact>
       ▼ <gmd:phone>
         ▼<gmd:CI_Telephone>
           \(\sigma\)(co:CharacterString> 8283014394 /gco:CharacterString>
           </gmd:voice>
</gmd:CI_Telephone>
       </gmd:phone>

V<gmd:address>

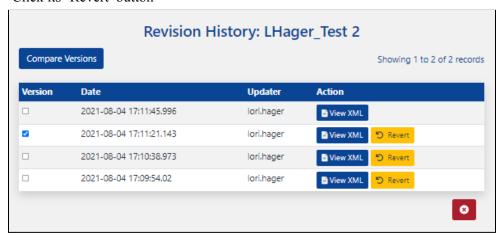
V<gmd:CI_Address>

V<gmd:deliveryPoint>
               <gco:CharacterString> 151 Patton Avenue </gco:CharacterString>
             </gmd:deliveryPoint>
           ▼<gmd:city>
               <gco:CharacterString> Asheville </gco:CharacterString>
           </gmd:city>
▼<gmd:administrativeArea>
             <gco:CharacterString> North Carolina </gco:CharacterString>
</gmd:administrativeArea>
           ▼ <gmd:postalCode>
               <gco:CharacterString/>
             </gmd:postalCode>
           ▼ <gmd:country>
               <gco:CharacterString> United States </gco:CharacterString>
           </gmd:country>

v<gmd:electronicMailAddress>
             <gco:CharacterString> catherine.luquire@noaa.gov </gco:CharacterString>
</gmd:electronicMailAddress>
           </gmd:CI_Address>
   </gmd:address>
</gmd:CI_Contact>
</gmd:contactInfo>
  codeListValue="editor"> editor </gmd:CI_RoleCode>
    </gmd:role>
 </gmd:CI_ResponsibleParty>
```

Undo a Change By Reverting To Prior Version

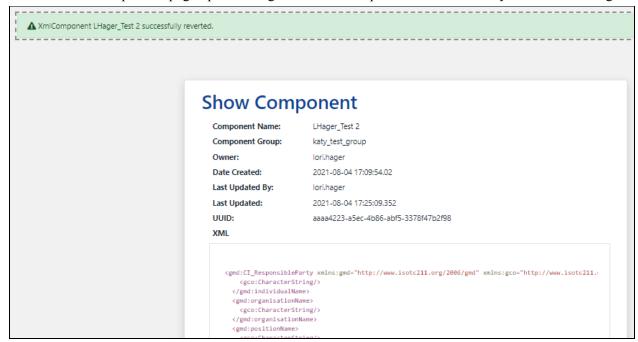
- Recall an earlier version and make it current version
 - o On Revision History page check appropriate Version box
 - Clicking red 'X' in bottom right corner will deselect Version box
 - Click its 'Revert' button



• Click 'OK'



• 'Show XML Component' page opens with green 'XMLComponent . . . successfully reverted.' message





- Click end tag icon to View XML
 - New tab opens

```
This XML file does not appear to have any style information associated with it. The document tree is shown below.
w<gmd:CI_ResponsibleParty xmlns:gmd="http://www.isotc211.org/2005/gmd" xmlns:gco="http://www.isotc211.org/2005/gco" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance"
xsi:schemaLocation="http://www.isotc211.org/2005/gmi https://data.noaa.gov/resources/iso19139/schema.xsd" wuid="7cd589b7-91e1-4ee7-bacd-f5db117bad2e">

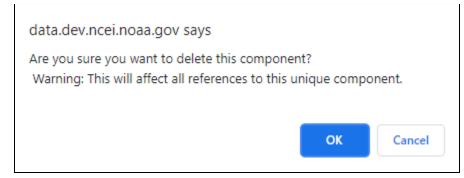
</grad/phone>

<pre
  </gmd:CI ResponsibleParty>
```

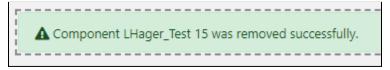


Delete this component

- Click trash icon to Delete Component
 - Message Box appears



- Click 'Cancel to return to XML Component List
- Click 'OK' to delete
- Green Message 'Component . . . was removed successfully' appears

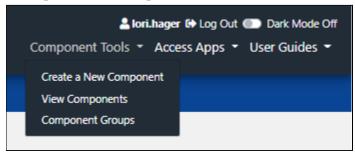


Note: User needs to republish records in CoMET or run a WAF on-demand in Metaserver to fully remove XML Component from records

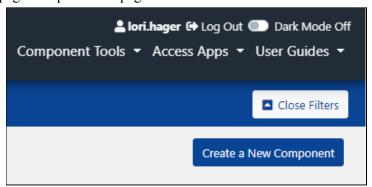
Component Tools

Create New Component

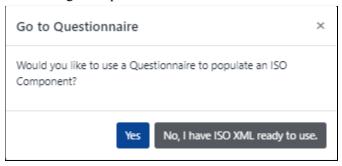
• On Home page, 'Component Tools' drop-down menu, click 'Create a New Component'



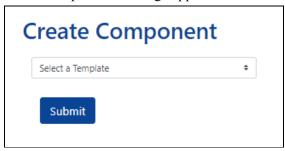
- OR, if on Component List page, click 'Create a New Component' button
 - May also click 'Create a New Component' button from other pages on site
 - Any page except 'Home' page



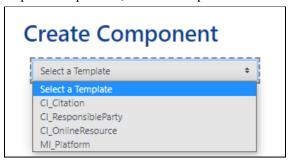
• 'Go to Questionnaire' dialog box opens



- Select 'No, I have ISO XML ready to use' if using complete, well-formed <u>ISO XML Snippet</u>
- If 'Yes' is selected, 'Create Component' message appears



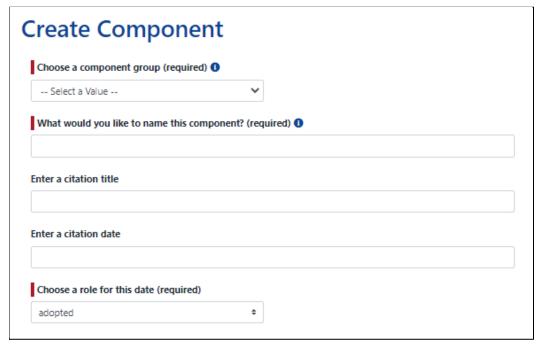
• From 'Select a Template' drop-down, select a template



o Click 'Submit'



- Enter data into fields or select value from drop-down menu
 - o Field titles will vary, depending on template selected
 - Required fields are indicated by a vertical red bar next to field name, as well as text '(required)' after field name
 - o Hover mouse over information icons for field details

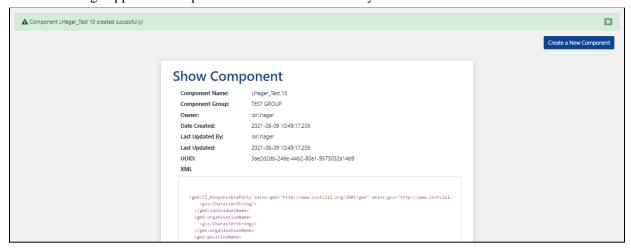


Note: Components can only be edited directly within its XML

• Scroll to bottom of page and click 'Create'



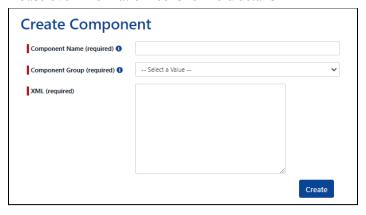
Message appears "Component . . . created successfully!"



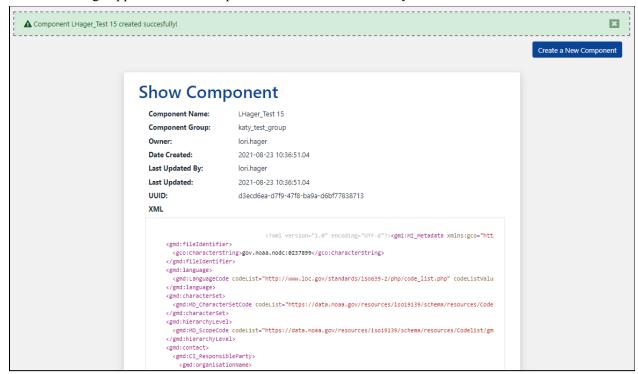
ISO XML Snippet

User must have complete, well-formed ISO XML snippets

- Enter data into fields or select value from drop-down menu
 - Required fields are indicated by a vertical red bar next to field name, as well as text '(required)' after field name
 - Hover mouse over information icons for field details



- Click 'Create'
- Message appears "XMLComponent . . . created successfully!"



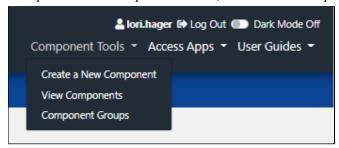
• If poorly formed XML is inserted into XML field, red error message appears

 ${\color{red} \blacktriangle}$ Failed to save component...XML is not well formed.

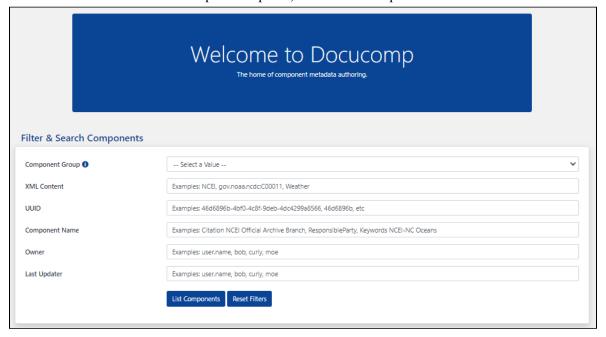
Correct XML content and resubmit

Components

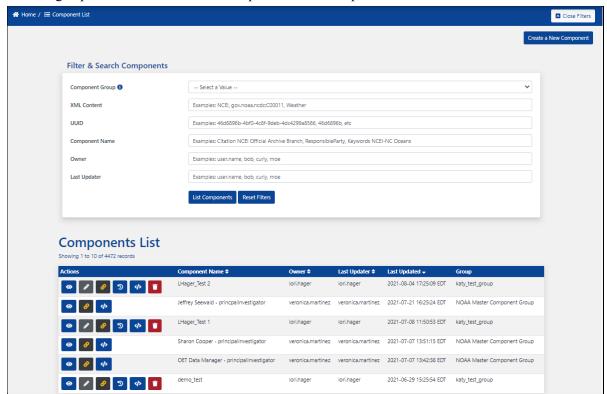
- To view all components, regardless of Component Group
- On Home page, 'Component Tools drop-down menu, click 'View Components'



• OR in 'Filter & Search Components' panel, click 'List Components' button



• Page opens to Filter & Search Components and Components List



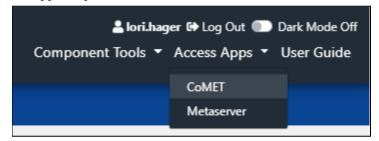
Insert Components into CoMET's ISO Editor

Note: There are many areas in CoMET's records where Docucomp Xlinks can be used CoMET does not resolve Xlinks

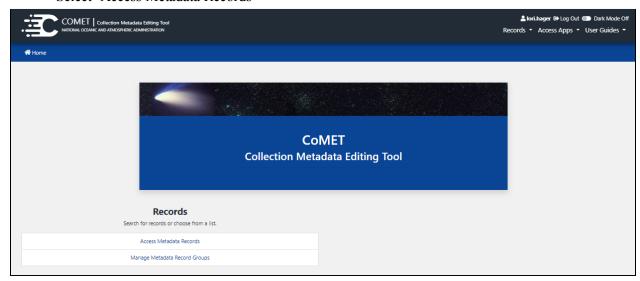
ISO Editor cannot tell if component is inserted into appropriate field, user must verify Xlink will not resolve in published record if incorrect component is inserted or incorrect field is selected

Insert Component into ISO Editor

- Access CoMET
 - From Access Apps drop-down, select CoMET

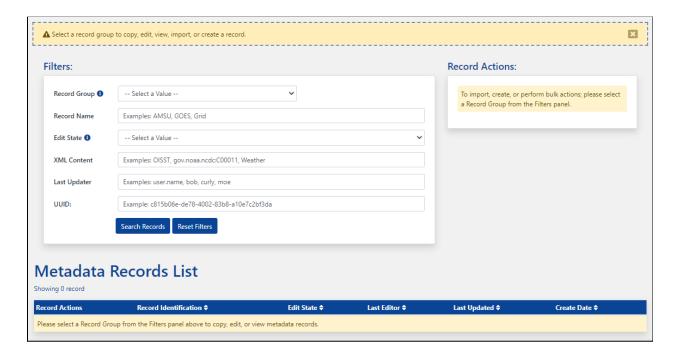


Select 'Access Metadata Records'

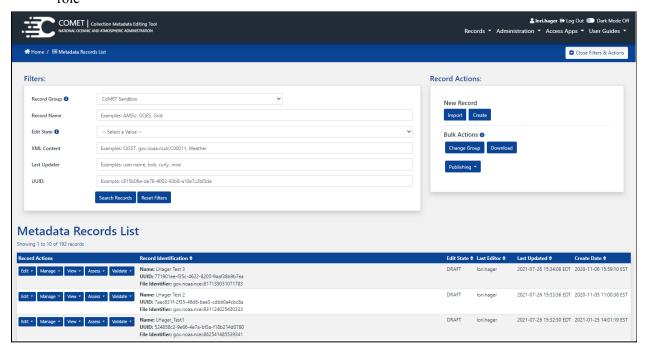


Note: A Record Group must be selected prior to performing any actions

• Select team's record group from 'Record Group' drop-down



• Page is auto-populated with records from that group, as well as any actions permitted per user role



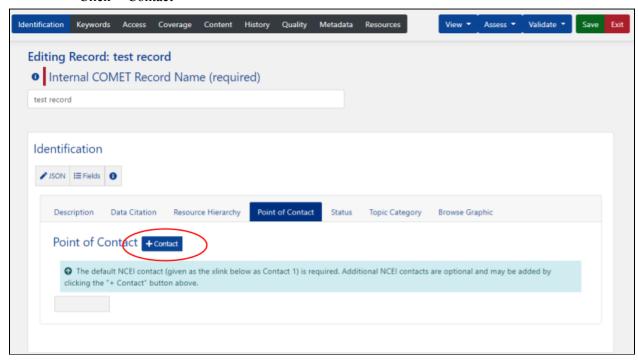
- On Metadata Records List panel, locate record to be edited and select 'Edit' drop-down from its row
 - o Select 'ISO Editor'



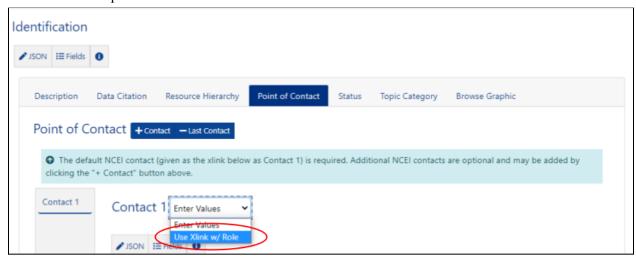
o Record opens in new tab

Note: Example shows how to insert a Point of Contact Xlink

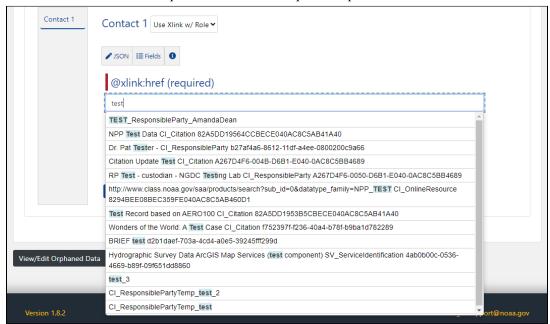
- Navigate to tab and field that corresponds to component
 - o Click '+Contact'



In the drop-down box next to 'Contact 1' select 'Use Xlink w/ Role'



- In @xlink:href field, begin typing component name
 - Select correct component from autocomplete drop-down list



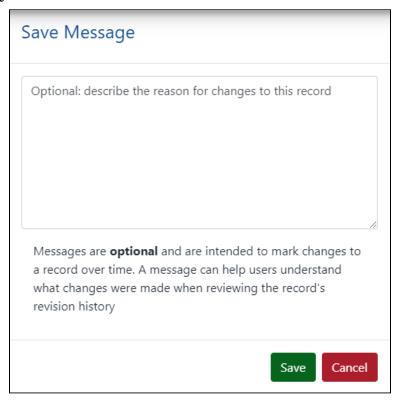
• In @title:href field, enter Component Name



• Click 'Save' button at top right of page OR Save icon at bottom right of page



- Save Message appears
 - o User has option to add reason for changes made to record
 - Comment is optional but strongly recommended
 - Save Messages are included in Revision History
- Click 'Save'



• Message appears 'Document updated successfully!'

Document updated successfully!

Use ISO Editor to Modify Point of Contact XML Component

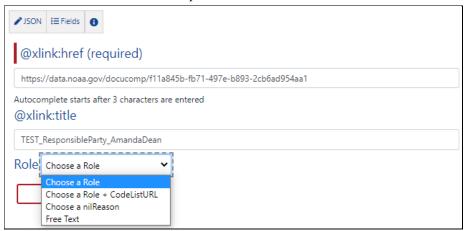
Note: This feature only updates XML Component within a given field, not XML Components in other fields and records

Only way to update a Component for each use is to edit component within Docucomp. Useful for when user wants to reuse XML Component but update Role Code for each reuse

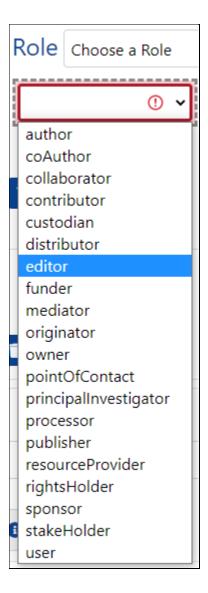
- Click 'Fields' button to add 'Role' field to form
 - Place check in box next to 'Role'
 - Click 'Fields' button again to close window



• Select 'Choose a Role' from Role drop-down menu



- Select appropriate Role from drop-down menu
 - o e.g. 'Editor'

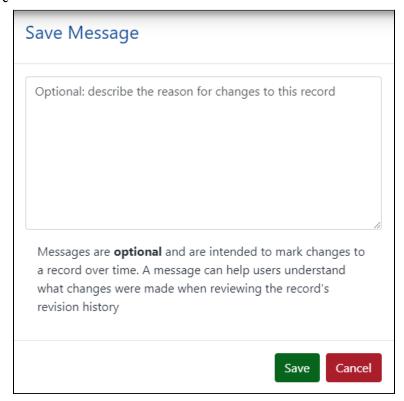


o Click 'Save' button at top right of page OR Save icon at bottom right of page





- Save Message appears
 - User has option to add reason for changes made to record
 - Comment is optional but strongly recommended
 - Save Messages are included in Revision History
- Click 'Save'



• Message appears 'Document updated successfully!'

Document updated successfully!

View Components in XML

• From View, select 'Unresolved ISO 19115-2 XML'



• Component is found in appropriate XML element

Note: CoMET does not resolve XML Components

<gmd:pointOfContact xlink:href="https://data.noaa.gov/docucomp/f11a845b-fb71-497e-b893-2cb6ad954aa1"
xlink:title="TEST_ResponsibleParty_AmandaDean"/>

- Once record is published outside of CoMET, Xlink should fully resolve
 - If Xlink does not contain valid ISO XML, Xlink will not resolve
- User can view fully resolved Xlink through <u>Metaserver</u> Record Services

```
v<gmd:pointOfContact xlink:title="TEST_ResponsibleParty_AmandaDean">
 ▼<gmd:CI_ResponsibleParty xsi:schemaLocation="http://www.isotc211.org/2005/gmi https://data.noaa.gov/resources/iso19139/schema.xsd"
  uuid="f11a845b-fb71-497e-b893-2cb6ad954aa1">
   ▼<gmd:individualName>
      <gco:CharacterString>Amanda Dean/gco:CharacterString>
    </gmd:individualName>
   ▼<gmd:organisationName>
      <gco:CharacterString>DOC/NOAA/NESDIS/NCEI > National Centers for Environmental Information, NESDIS, NOAA, U.S. Department of
      Commerce</gco:CharacterString>
    </gmd:organisationName>
   ▼ <gmd:positionName>
      <gco:CharacterString>ISO 19115 Metadata Contact/gco:CharacterString>
    </gmd:positionName>
   ▼ <gmd:contactInfo>
     ▼ < gmd:CI Contact>
      ▼<gmd:address>
        ▼<gmd:CI_Address>
          ▼ <gmd:deliveryPoint>
              <gco:CharacterString>151 Patton Ave</gco:CharacterString>
           </gmd:deliveryPoint>
          ▼<gmd:deliveryPoint>
             <gco:CharacterString>Veach-Baley Federal Building, Room 468</gco:CharacterString>
           </gmd:deliveryPoint>
          ▼ <gmd:city>
             <gco:CharacterString>Asheville</gco:CharacterString>
            </gmd:city>
          ▼ <gmd:administrativeArea>
              <gco:CharacterString>NC</gco:CharacterString>
           </gmd:administrativeArea>
          ▼ <gmd:postalCode>
             <gco:CharacterString>28801-5001</gco:CharacterString>
            </gmd:postalCode>
          ▼ <gmd:country>
              <gco:CharacterString>USA</gco:CharacterString>
            </gmd:country>
          ▼ <gmd:electronicMailAddress>
             <gco:CharacterString>amanda.dean@noaa.gov</gco:CharacterString>
           </gmd:electronicMailAddress>
          </gmd:CI_Address>
        </gmd:address>
      </gmd:CI_Contact>
     </gmd:contactInfo>
   ▼<gmd:role>
      <gmd:CI_RoleCode codeList="https://data.noaa.gov/resources/iso19139/schema/resources/Codelist/gmxCodelists.xml#CI_RoleCode"</pre>
      codeListValue="principalInvestigator">principalInvestigator/gmd:CI_RoleCode>
    </gmd:role>
   </gmd:CI_ResponsibleParty>
 </gmd:pointOfContact>
```

Change Log

Revision Number	Description of Change	Author	Date
NR	New Release	C Luquire, L Hager	6/28/2021
A	Updated version number on title page and footer; included user interface upgrades; updated screenshots; changed 'Xml Component' to 'Component'; 'View Component' button removed from 'Compare Versions' page	L Hager, C Luquire	9/07/2021