



Docucomp User Manual

Production Version 4.7.2

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Contact Information

Send questions, feedback, issues, and bugs regarding this guide to the Collection Manager Support email at ncei.collection-manager.support@noaa.gov. If an issue or bug, include 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 Lynn Reeves, and John Relph 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.

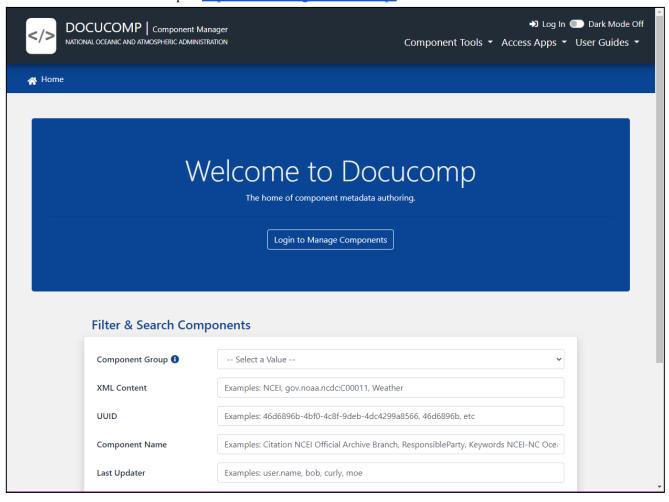
Helpful Quickfacts

- 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

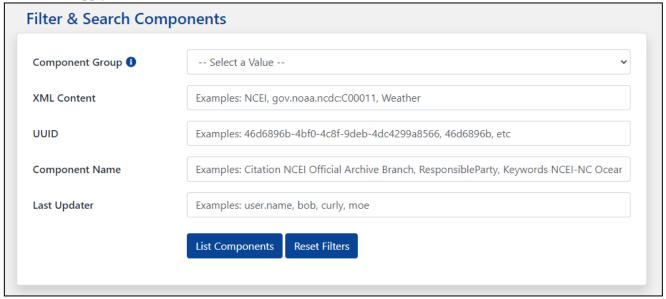
Note: Some functions may be accessed without logging in

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

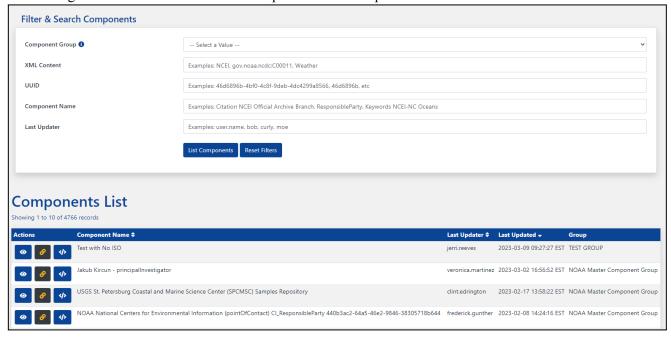


Filter & Search Components

- Hover over blue and white 'i' for 'Component Group Details'
- To view all components, click 'List Components' button
- To view components from a specific group, select group from 'Component Group' drop-down menu
- Apply other filter(s), if desired



• Page loads with Filter & Search Components and Components List



Components List

Actions

- Click Action link below for instructions
- View Component
- Copy Xlink
- View XML

New Users

Note: Manager must approve access

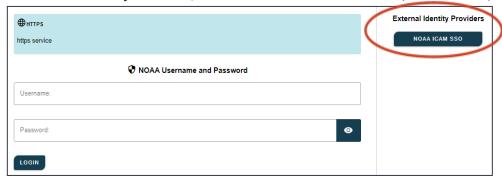
- Email: <u>ncei.collection-manager.support@noaa.gov</u>
- Subject:
 - New User for Docucomp for employee name
- Body:
 - o Employee's Contact information
 - Associated program or agency
 - o Component Group(s) to be accessed
 - If Component Group is unknown, user will be assigned to default Component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

Log In for Full Access

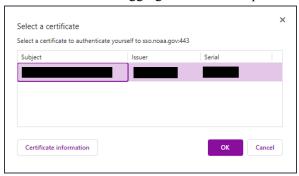
- Access Docucomp at https://data.noaa.gov/Docucomp/
- Select 'Login to Manage Components'



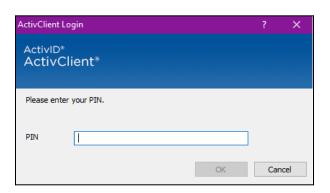
- Enter Username (email address without @noaa.gov) and email password OR
- Below External Identity Providers, click 'NOAA ICAM SSO' button (recommended)



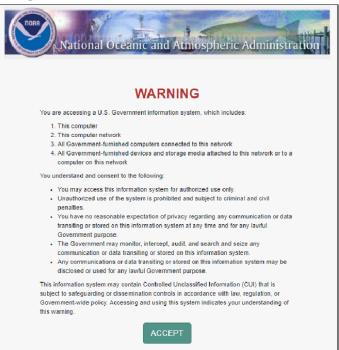
- 'Select a certificate', if prompted
 - o Select same certificate used when logging into work computer



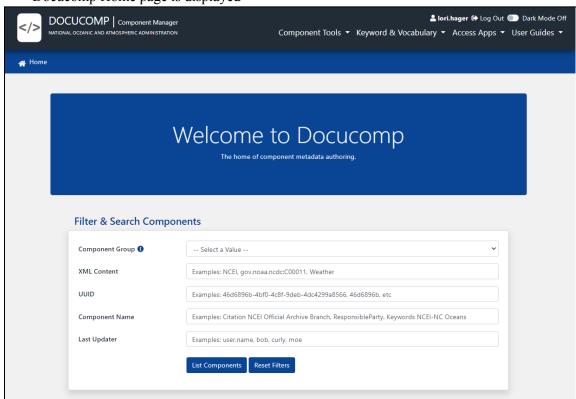
• Enter CAC PIN



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



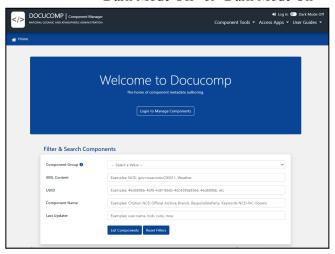
• Docucomp Home page is displayed

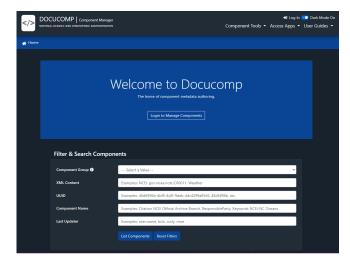


Viewing Options

Dark Mode

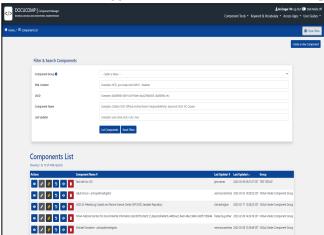
- Toggle button for 'Dark Mode' at top right corner of screen
 - o 'Dark Mode Off' or 'Dark Mode On'

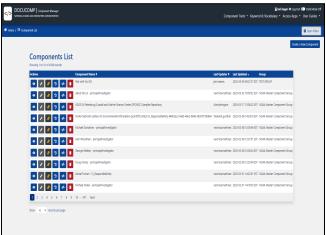




Streamline Page

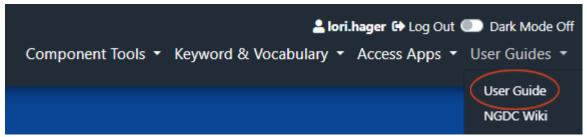
- Click 'Close Filters'
 - o Toggle between 'Close Filters' and 'Open Filters'





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 In DOCUCOMP section, below RESOURCES, click link 'Docucomp User Guide'

Docucomp

<u>Docucomp</u> is a NOAA-owned web application for inserting, editing, and managing XML components, which are chunks of XML that describe specific pieces of metadata content. They are stored in a database and managed with <u>REST</u> web services. The REST services support insert, search, update and delete operations. You will need a NOAA account to use docucomp.

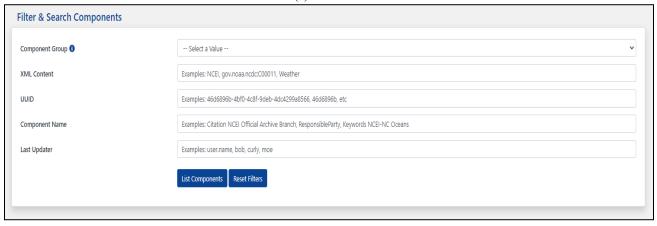
Launch Docucomp

Resources

- Docucomp User Guide
- Docucomp Component Management System

Filter & Search Components

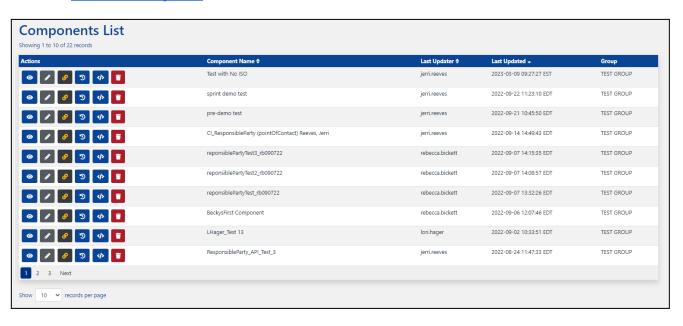
- Filter panel allows limiting number of components by various criteria
 - Filter components by:
 - Component Group
 - Hover over blue and white 'i' for 'Component Group Details'
 - XML Content
 - UUID
 - Automatically generated or use own from XML
 - Component Name
 - Last Updater
 - Click 'List Components'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



Components List

Actions

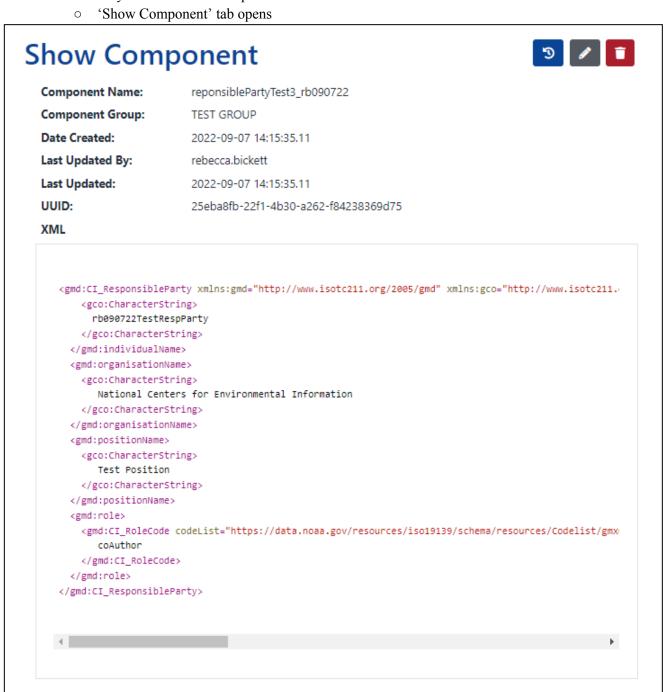
- <u>Vi</u>
 - View Component
- Edit Component
- •
- Copy Xlink
- **©**
- View Revision History
- **4>**
- View XML
- Delete this component



Actions



• Click Eye icon to View Component



• In top right corner of screen 'View Revision History', 'Edit Component', and 'Delete this component' features for this component may be accessed



Edit Component

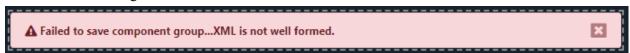
- Click Pencil icon to Edit Component
 - o 'Edit Component' tab opens
 - Apply edits
 - o Click 'Update'



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



- o 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





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

Docucomp Xlink copied to clipboard successfully!

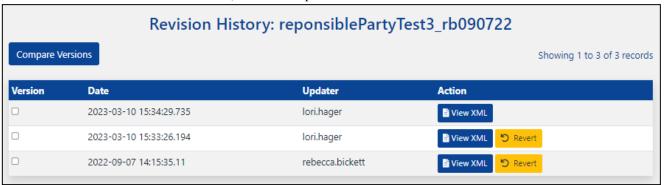
Note:

- 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
- See CoMET User Guide for instructions to insert Xlinks into CoMET's ISO Editor



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 checks in Version box
- Click 'Compare Versions'

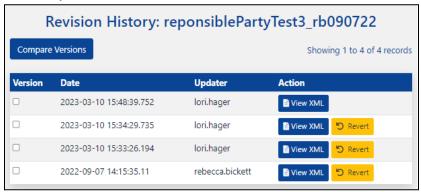


• Below 'Version', numbers in left column refer to older version and numbers in right column refer to more recent version

Compare Versions reponsiblePartyTest3_rb090722 Number of differences: 1 differences from 1 line of code. Version (72922) vs. (74187) <gmd:CI_ResponsibleParty</pre> xmlns:gmd="http://www.isotc211.org/2005/gmd" 2 xmlns:gmd="http://www.isotc211.org/2004/gmd" - 3 xmlns:gco="http://www.isotc211.org/2005/gco" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" $\verb|xsi:schemaLocation="http://www.isotc211.org/2005/gmi https://data.noaa.gov/resources/iso19139/schema.xsd"|$ 6 uuid="25eba8fb-22f1-4b30-a262-f84238369d75"> <gmd:individualName> 8 <gco:CharacterString> rb090722TestRespParty 10 </gco:CharacterString> 11 </gmd:individualName> 11 12 <gmd:organisationName> <gco:CharacterString> 13 14 14 National Centers for Environmental Information 15 15 </gco:CharacterString> 16 </gmd:organisationName> 17 <gmd:positionName> 18 18 <gco:CharacterString> 19 19 Test Position 20 20 </gco:CharacterString> 21 21 </gmd:positionName> <gmd:role>

View Component's XML from Revision History Page

- Action
 - o Below Action, click 'View XML'



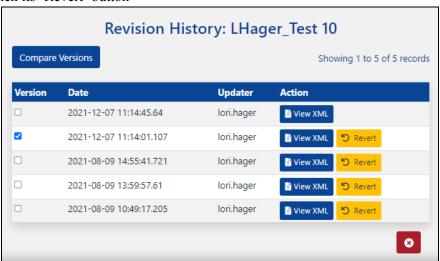
XML for selected component opens in new tab

```
This XML file does not appear to have any style information associated with it. The document tree is shown below.
▼<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="25eba8fb-22f1-4b30-a262-f84238369d75">
 ▼ <gmd:individualName>
      <gco:CharacterString> rb090722TestRespParty </gco:CharacterString>
   </gmd:individualName>
 ▼ <gmd:organisationName>
     <gco:CharacterString> National Centers for Environmental Information </gco:CharacterString>
   </gmd:organisationName>
 ▼ <gmd:positionName>
     <gco:CharacterString> Test Position </gco:CharacterString>
   </gmd:positionName>
  ▼<gmd:role>
     .

<
     coAuthor </gmd:CI_RoleCode>
   </gmd:role>
 </gmd:CI_ResponsibleParty>
```

Undo a Change By Reverting To Prior Version

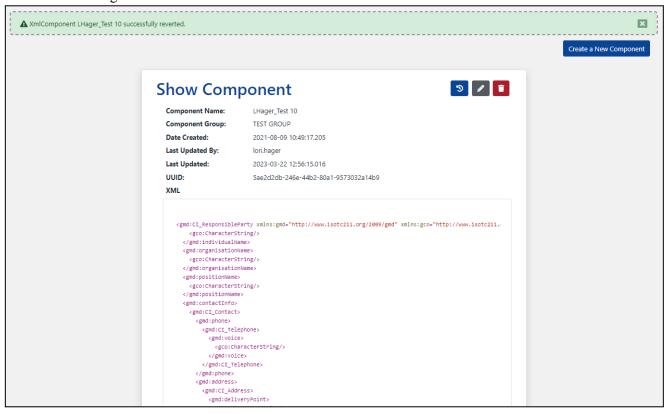
- Recall an earlier version and make it current version
 - o On Revision History page check appropriate Version box
 - Clicking red 'X' in bottom right corner will deselect check(s) in Version box
 - Click its 'Revert' button



• Click 'OK'



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





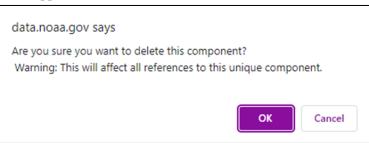
- Click View XML icon to View XML
 - New tab opens





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

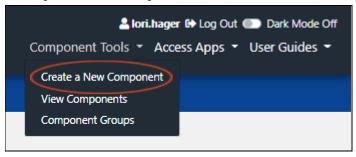


Note: User must republish records in CoMET or run a WAF OnDemand in Metaserver to fully remove XML Component from records

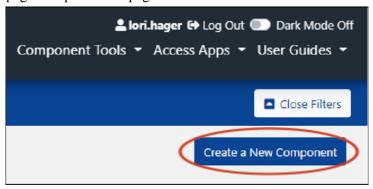
Component Tools

Create New Component

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



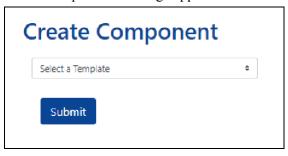
- OR, if on Component List page, click 'Create a New Component' button
 - May also click 'Create a New Component' button from other pages on site
 - Any page except 'Home' page



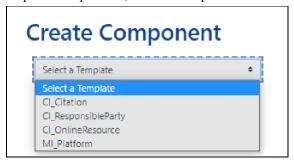
• 'Go to Questionnaire' dialog box opens



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



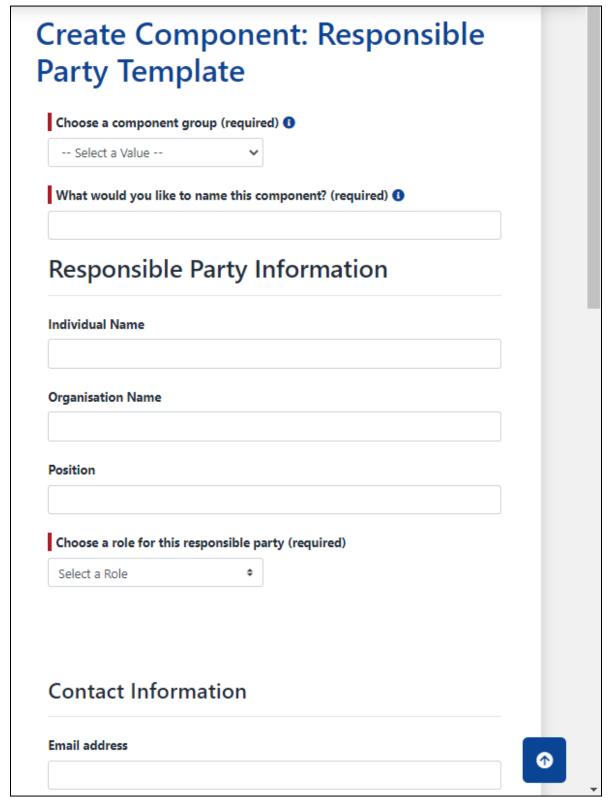
o From 'Select a Template' drop-down, select a template



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
 - Hover mouse over information icons for field details

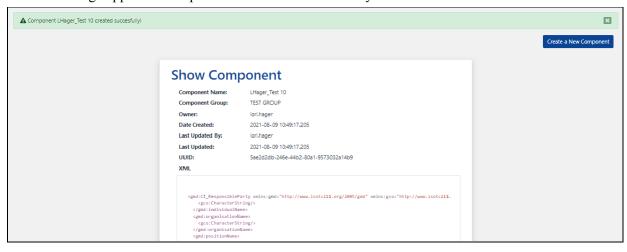


Note: Components can only be edited directly within its XML

• Scroll to bottom of page and click 'Create'



• Message appears "Component . . . created successfully!"



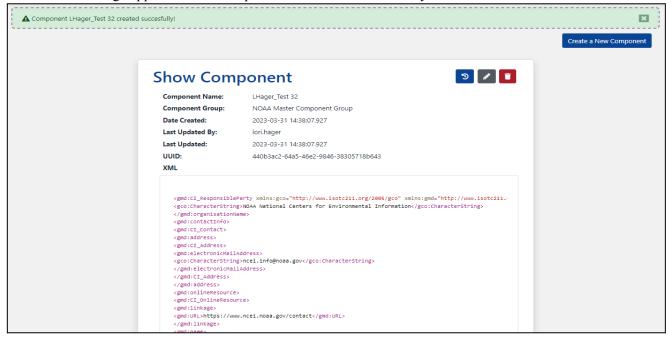
ISO XML Snippet

Note: 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 over blue and white 'i' for field details



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



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

▲ Failed to save component...XML is not well formed.

Correct XML content and resubmit

Insert Components into CoMET's ISO Editor

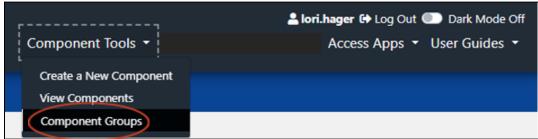
• See CoMET/DSMQ User Guide

Component Groups

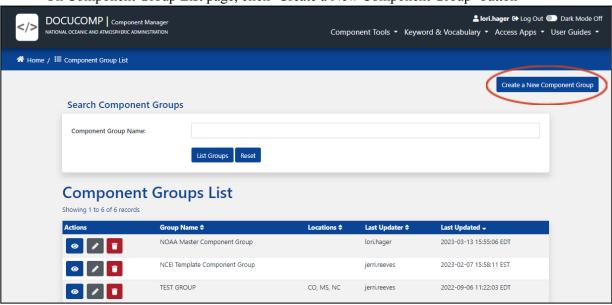
Note: User must have Group role to perform these actions

Create New Group

- Log in
- On Home page, select Component Tools drop-down and click 'Component Groups'



• On Component Group List page, click 'Create a New Component Group' button



- Enter a Group Name
 - Required fields are indicated by a vertical red bar next to field name, as well as text '(required)' after field name
 - o Locations and Description are optional
- Click 'Create'



Message appears "XmlComponentGroup . . . created successfully!"



Component Groups List

Note: User must have Group role to perform these actions

Actions



View Group



Edit Group



Delete Group

Actions



☐ View Group

- Click Eye icon to View Component Group
 - o 'Show Component Group' tab opens

Show Component Group





Component Group Name: LHager_Test Group

Description: Test Group
Last Updated By: Iori.hager

Last Updated: 2023-03-31 16:07:37.312

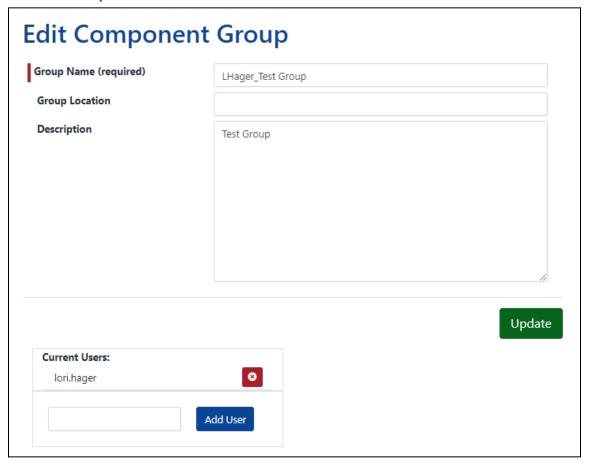
Date Created: 2023-03-31 16:07:37.312

• Group may be edited or deleted from this page



Edit Group

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

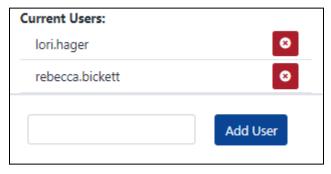


Add User to Group

- From 'Edit Component Group' box, scroll down to list of users
 - o Next to 'Add User' button, enter user's name
 - Click 'Add User'

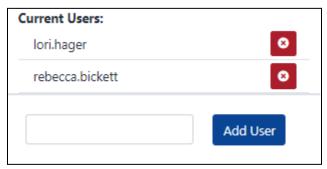


• User's name is added to list of Current Users



Delete User From Group

- From 'Edit Component Group' box, scroll down to list of users
 - Click the red 'X' next to user's name to be deleted



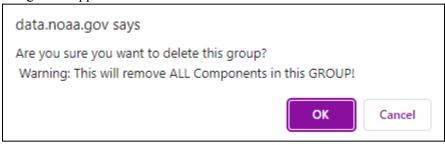
• User's name is removed from list of Current Users





Delete Group

- Click Trash icon to Delete Group
 - o Message Box appears



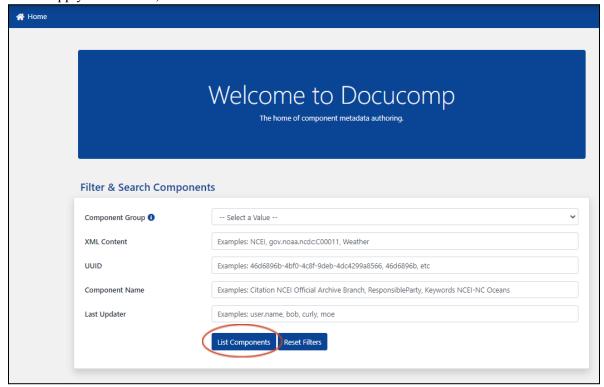
- Click 'Cancel to return to Component Groups List
- Click 'OK' to delete
- o Green Message 'Component Group removed successfully' appears

 ${\color{blue} \blacktriangle}$ Component Group removed successfully.

Move Components Between Groups

Note: User must have Group role to perform these actions

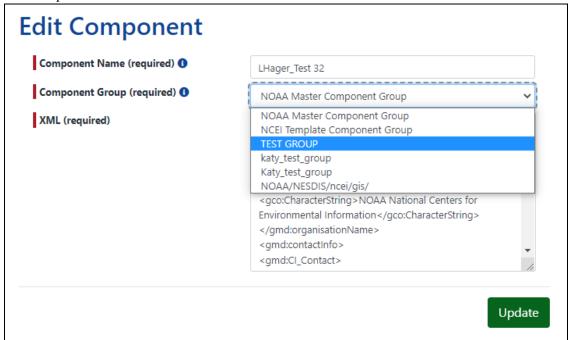
- Home page, click 'List Components'
 - o Apply other filters, if desired



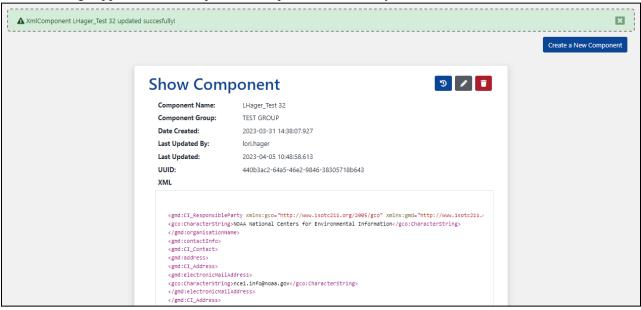
• From 'Components List', select 'Edit Component' (pencil icon) function for component to be moved



- In 'Edit Component' box, select new Component Group from drop-down menu
- Click 'Update'



Message appears "XmlComponent . . . updated successfully!"



API (Application Programming Interface)

Docucomp API is a software interface that allows connection between computers or computer programs. It gives users the ability to write programs (scripts) to create/import, export, update, and delete single or multiple XML Components.

Note:

- Docucomp APIs are intended for users with computer programming experience
- To view the complete API documentation, along with code samples, go to <u>Docucomp API (v1)</u>

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
В	Updated version number on title page; added version number and page number in footer; revised Overview; in Contact Info, replaced OSMC team with collection manager support email; updated screenshots; removed all references to 'owner' and 'component owner'; moved 'Insert Component into ISO Editor' section to CoMET user guide; added functions for users with GROUP role; added link to Docucomp API (v1)	L Hager	4/05/2023