



# *Agile*Taxonomy Attributes Guide

Enhanced Capabilities for Livelink™ Taxonomy

June 2007

San Diego, USA

# Powerful new capabilities for Livelink taxonomy enable solutions

The Corent *AgileTaxonomy* system for Livelink seamlessly integrates powerful new capabilities into the Livelink™, allowing sophisticated business logic to be incorporated into ECM solutions.

Corent Attribute System

Type: Agile Date

Name: SaleDate

Description:

Rows:	Locked	<input checked="" type="checkbox"/>
	Max.#	1
	Default #	1

Order: After Values

Include Time Field:

Required:

Default Value: 06/21/2007 46 AM

Date Format: 2007/06/21 (YYYY/MM/DD)

Time Format: 18:46:20 (HH:MM:SS)

OK Reset Cancel

# Powerful new capabilities for Livelink taxonomy enable solutions

- The *AgileTaxonomy* module for Livelink seamlessly integrates powerful new capabilities into the Livelink system, allowing sophisticated business logic to be incorporated into ECM solutions.

## Livelink Category Attributes (examples)

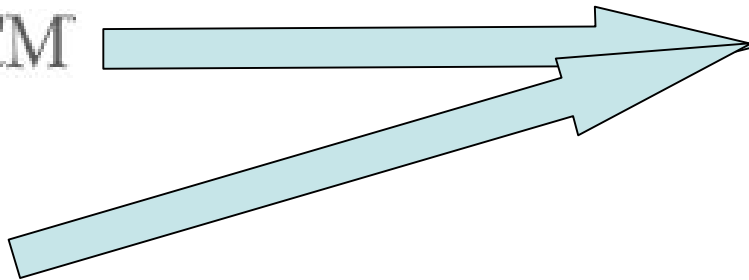
Department	(pick list)
Region	(pick list)
City	(text)
Office Address	(multi-line)
Topic Area	(multi-value pick list)
Document Type	(pick list)
Filing Retention Code	(pick list)
Retention Action Date	(date)
Project Number	(integer)

## *AgileTaxonomy* Enhancements

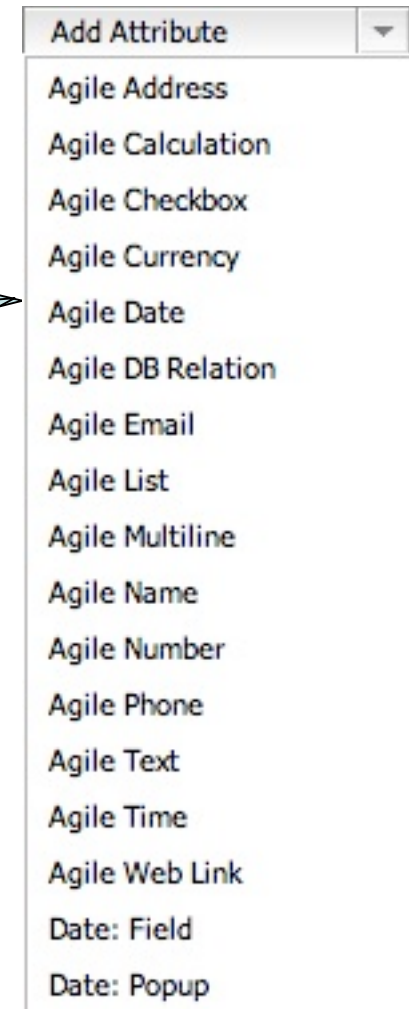
- New Attribute Types
  - Complex structured fields: formatted addresses, lists
- Business Rules and Triggers
  - Lookup, validation, conditional logic
  - Cascading and/or cross-field
- Extends access to content metadata via web services

# Agile Taxonomy module for Livelink integrates seamlessly

The Livelink interface appears as it usually does, with the new attribute types presented



- New attribute actions
- New attribute types
- Business rule processes
- External processing

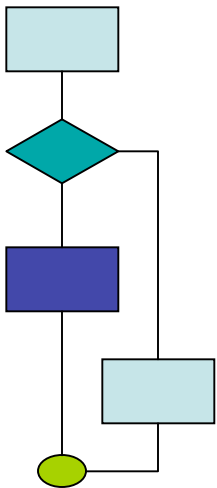


# Business logic capabilities can be used to help manage classification

- Business logic implemented through triggers allows more control over Livelink Category Attributes

– Powerful business rules:

- Can trigger actions upon classification events
  - Example: The logged on user identity or project ID could be used to validate the appropriateness of certain attributes
  - Validation rules or actions can go beyond the simple checking of Livelink data and can perform calculations, database lookups and logical tests on attribute values and take actions such as alerts and emails and data manipulation.



# Taxonomy in Livelink is used to improve search and retrieval

- Categories and Attributes definitions associated with content objects classify those objects
- These attributes are indexed by the Livelink search engine and can be used in addition to the full text indexing to provide search and retrieval precision
- The new *Agile*Taxonomy attributes are integrated as part of the Livelink Category and work in the same way, indexed by the Livelink search engine.



# Structured attributes aid in consistency of input and display

- Address attribute
  - Template aids users in filling in information completely and consistently

Address attribute (structured)

Address Line 1		
Address Line 2		
City	State	Postal Code
Country		

Business rules can trigger actions such as validating or even filling in the correct postal code based on address information, or perform lookups on outside systems to match and validate information.

# New attributes can coexist with or replace existing Livelink attributes

- Currency
- Address
- Name
- Phone number
- Contact
- List
- Calculation
- Checkbox
- Email
- Weblink
- Date
- Time
- Text
- Number
- Multiline
- Database Relation

The enhanced attributes can be used in new Livelink Categories, or added to existing Categories.

Some have structure and validation rules implicitly, and all can have business rules act upon their values.

These attributes provide capabilities beyond the standard Livelink functionality.

# Currency attribute

- The currency attribute can be predefined to have zero to five decimal places
- It has a parameter setting to indicate the currency type (i.e.: Dollar, Euro, Yen, Pound, etc.)
- Minimum and maximum values can be set

Corent Attribute System		
Type:	Agile Currency	
Name:	<input type="text" value="HandlingFee"/>	
Description	<input type="text"/>	
Rows:	Locked	<input checked="" type="checkbox"/>
	Max.#	<input type="text" value="1"/>
	Default #	<input type="text" value="1"/>
Order:	After <input type="text" value="Values"/>	
Required:	<input type="checkbox"/>	
Default Value	<input type="text"/>	
Currency Type	<input type="text" value="US Dollar"/>	
Decimal	<input type="text" value="2"/>	
Minimum	<input type="text" value="1.00"/>	
Maximum	<input type="text" value="9.99"/>	
<input type="button" value="OK"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>		

TransactionAmount:	<input type="text" value="0.00"/>
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# Address attribute

- Address is a structured with standard address field components
  - Address Line 1
  - Address Line 2
  - City
  - State
  - Postal Code / Zip
  - Country

OfficeAddress: ⚠	Street:	<input type="text" value="pob"/>
	Street1:	<input type="text" value="n/a"/>
	City:	<input type="text" value="Hill AFB"/>
	State:	<input type="text" value="ut"/>
	Zip Code:	<input type="text" value="84056"/>
	Country:	<input type="text" value="usa"/>

# Name attribute

- Name attribute is designed to structure a person's name
  - First name
  - Middle name
  - Last name

<b>OwnerPerson:</b> 	First Name:	<input type="text" value="Mike"/>
	Middle Name:	<input type="text" value="Norman"/>
	Last Name:	<input type="text" value="Oliver"/>

# Phone Number attribute

- Phone number is a structured attribute that composes a standard telephone number into the ITU E.123 standard format:

National format                      (123) 867 5209

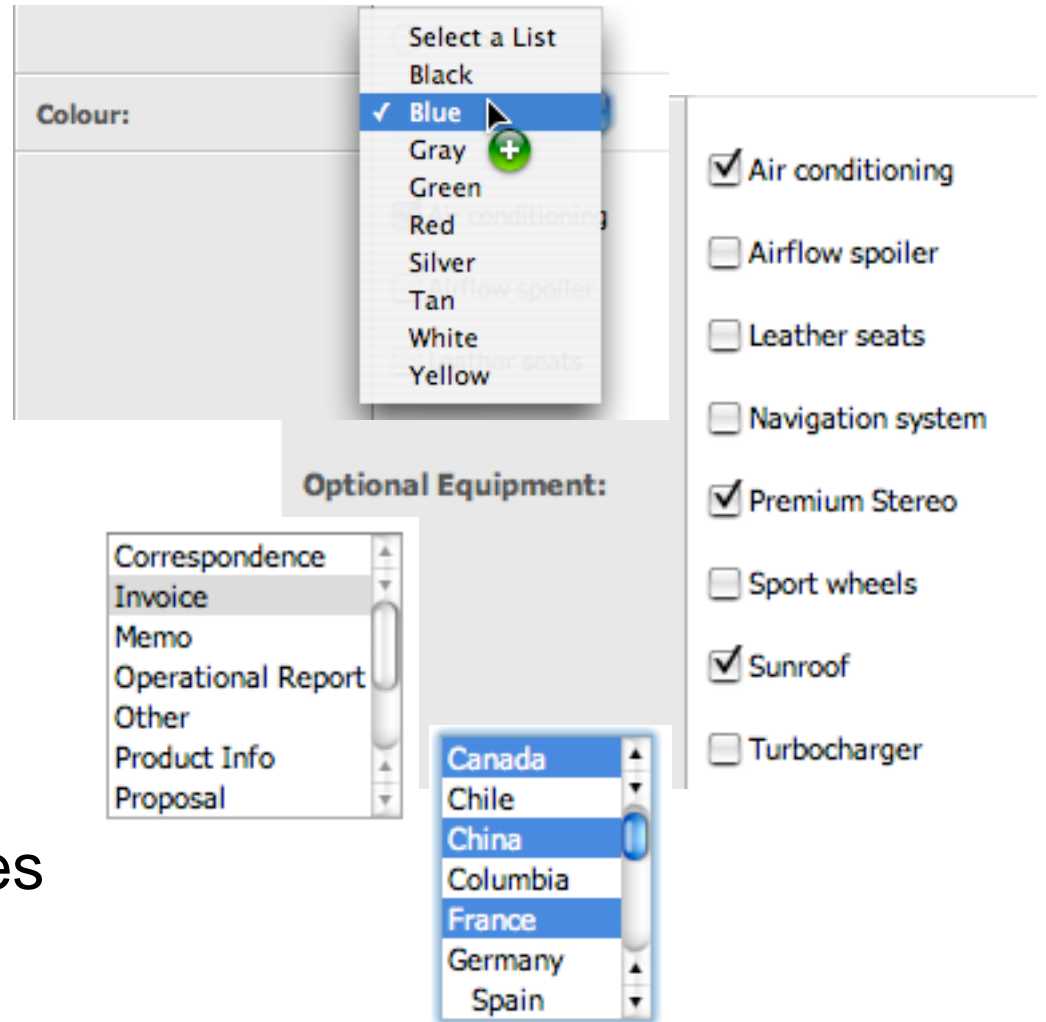
International format            + 11 23 234 5542

- Area code brackets indicate digits that sometimes do not need to be dialed.
- The plus sign indicates the ITU assigned country code

ContactPhone:	(201) 867-5309
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# List attribute provides flexible multiple item selection options

- The list of valid choices can be defined and then presented as:
  - A select pulldown
  - A set of checkboxes
  - A scrolling list box
- Single or multiple selections can be made from the available choices



# Contact attribute enables reference to an external directory

- The Contact attribute accesses a database table that contains contact names
- The lookup mechanism supports speed and consistency by allowing partial name lookup and selection from a presented list
- It is similar in concept to the Livelink Name attribute, but isn't restricted to contacts which are named users in Livelink
  - Example: a list of contacts could be derived from an LDAP, or a customer system such as an ERP or CRM application and kept in the Corent application engine contact database

# Calculation attribute

- Calculation attribute is a numeric with a defined number of decimal places
- Calculation is performed with regular expressions syntax
  - Mathematical operators ( +, -, \*, / )
  - Mathematical functions ( Min, Max, Avg, etc. )
- Any of the other numeric attributes in the Category can be used in the expression as variables

Corent Attribute System		
Type:	Agile Calculation	
Name:	<input type="text" value="TaxAmount"/>	
Description:	<input type="text"/>	
Rows:	Locked	<input checked="" type="checkbox"/>
	Max.#	<input type="text" value="1"/>
	Default #	<input type="text" value="1"/>
Order:	After <input type="text" value="Values"/>	
Decimal	<input type="text" value="2"/>	
Display Symbol	<input checked="" type="radio"/> Default <input type="radio"/> Percentage	
Expression	<input type="text" value="CatID&lt;br/&gt;NodeID&lt;br/&gt;SalePrice&lt;br/&gt;TaxRate"/>	<input type="text"/>

OK Reset Cancel

# Email attribute

- Similar to standard text attribute, with the addition of validation for proper email address structure

EmailAddress:	<input type="text" value="info@CorentTech.com"/>
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# Weblink attribute

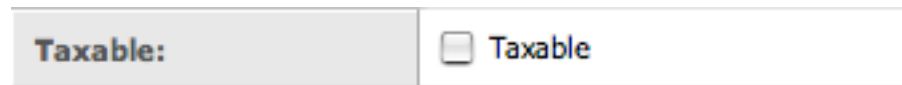
- Similar to standard text attribute, with the addition of validation for proper internet format for a URL.
  - Provides the protocol part of the URL so it is never mistyped
    - Example: http, https, ftp, file
  - Validates the string for allowed characters and delimiters



TrackingWebsite: HTTP www.AgileTaxonomy.com

# Checkbox attribute provides a binary choice mechanism

- Checkbox presents with a standard checkbox interface and a designated label



Taxable:  Taxable

# Date attribute

- The date attribute provides a full date + time capability
  - The time portion is optional

The image shows a user interface for date selection. On the left, there are three input fields:

- EventDate:** Contains the date "06/27/2007" and a calendar icon.
- AgileDate:** Contains the date "6/28/2007" and a calendar icon.
- AgileDateWithTime:** Contains the date "6/28/2007", a calendar icon, and three time selection controls: "11" with a dropdown arrow, "26" in a text box, and "PM" with a dropdown arrow.

A large orange arrow points from the "EventDate" field to a "Date-Picker" window on the right. The window shows a calendar for June 2007 with the date 27 highlighted.

S	M	T	W	T	F
					1
3	4	5	6	7	8
10	11	12	13	14	15
17	18	19	20	21	22
24	25	26	27	28	29

# Time attribute

- The time attribute provides a time only
  - There is no date associated with the time
- Time is stored as a numeric value and can be displayed with 24 hour clock format or AM and PM indicators

BestTimeToCall:



# Text attribute

- The text attribute is a standard text field designed for variable length character strings

DocDescription:	Water resource article
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Alright, we have to admit there isn't anything especially notable about this attribute type, but we couldn't leave out a general purpose text attribute, it simply wouldn't have felt right.

# Number

- Number is a real number field
  - The number of decimal places can be defined, so it can be an integer number if the decimal places is defined as zero.
  - Can be used in calculations in a Calculation attribute

<b>TaxRate:</b>	6.000
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# Mutli-line attribute

- The Multi-line attribute is designed to enable one or more separate entries or selections, forming a list

The screenshot shows the configuration interface for a Multi-line attribute in the Corent Attribute System. The main configuration panel on the left includes the following fields:

- Type:** Agile Multiline
- Name:** Keywords
- Description:** Keywords of relevance to search
- Rows:**
  - Locked:**
  - Max.#:** 1
  - Default #:** 1
- Order:** After Values
- Rows:** 3
- Columns:** 70
- Required:**
- Default Value:** (empty text box)

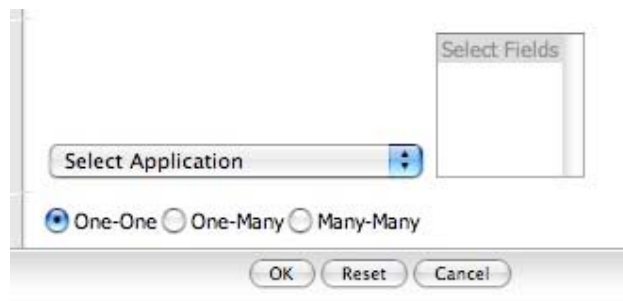
At the bottom of the configuration panel are buttons for **OK**, **Reset**, and **Cancel**.

To the right of the configuration panel, a preview window displays the attribute's value. The label **Keywords:** is followed by a text box containing the following text:

Greenfield  
currency exposure  
penalty clause

# Database Relation

- This attribute type is designed to enable flexibility in maintaining a selectable set of values to choose
  - A relationship is defined with a database table and the selectable values are presented from the database query results
  - This helps maintain up to date values in the selection lists and ensures no selections are made that are no longer valid ( as can happen with static values lists )



Select Fields

Select Application

One-One  One-Many  Many-Many

OK Reset Cancel



Vendor: 4738

# The new attributes and their business rules capability add power

- The new attributes enable the creation of business solutions through the application of the rules logic
  - Actions can be triggered to occur based on any values or calculations of changes
  - The state of validity or value of any attribute can be checked and cross referenced with any other
  - The value of attribute or other external data can be manipulated in the event trigger process rules.

# Solutions Incorporating Documents rely on Taxonomy for Context

- Integrating business applications with documents demands contextual metadata to associate the structured database information with the unstructured content (documents)
- Content objects have system metadata and optional explicit taxonomy metadata
- Its typically the explicit taxonomy data that creates the association with the other application and enables the integration

*The AgileTaxonomy system enables powerful and easy to use facilities for making use of Livelink taxonomy data in integrated business solutions.*

# *Agile* Taxonomy

