

## 1. What is C3?

Cogniva's content classification solution, C3, provides an interface for the various Information Management (IM) services, it integrates seamlessly with content creation and management platforms. C3 provides users with a mechanism for applying consistent, predictable, and comprehensive metadata to enterprise content (including, but not limited to, documents, emails, and corporate knowledge). The users also benefit from the ability to find, sort, and search their documents more efficiently. This metadata is customized for each organization-based business context and rules so that when a document is created there will be an accurate description of its content. C3 improves how organizations describe, access, and group their organizational content.

Version 5.1.0.4

## 2. Using the C3 Classifier Interface

The C3 Classifier is the main user interface for C3 and can be integrated with Microsoft Office Suite products (Word, Excel, Outlook, etc.), or other content management systems such as SharePoint, OpenText Content Server, and eDocs.

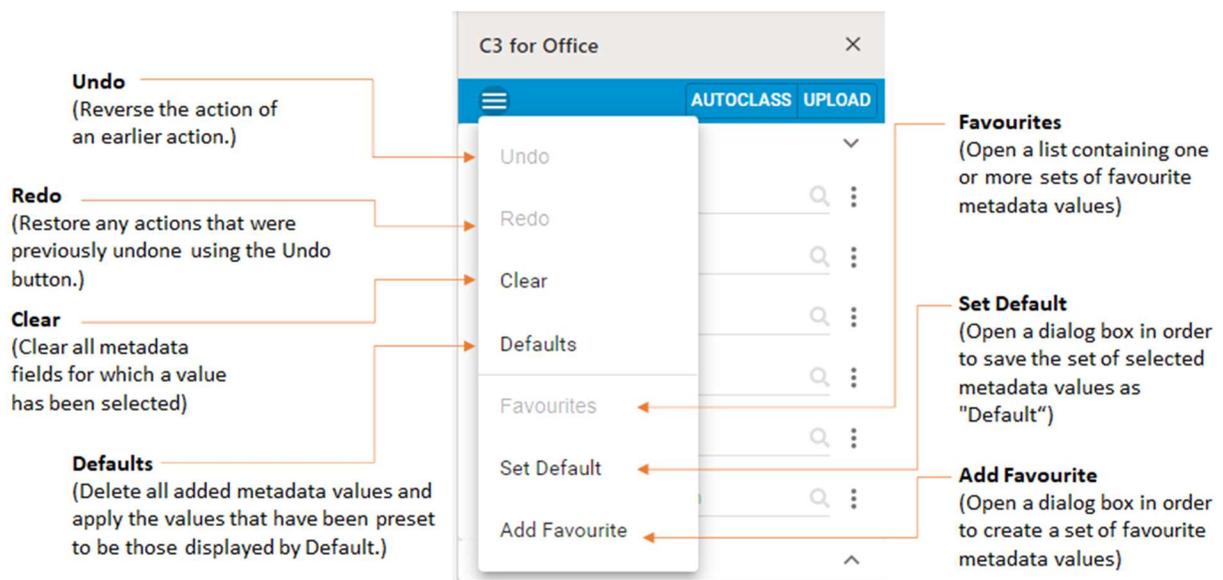
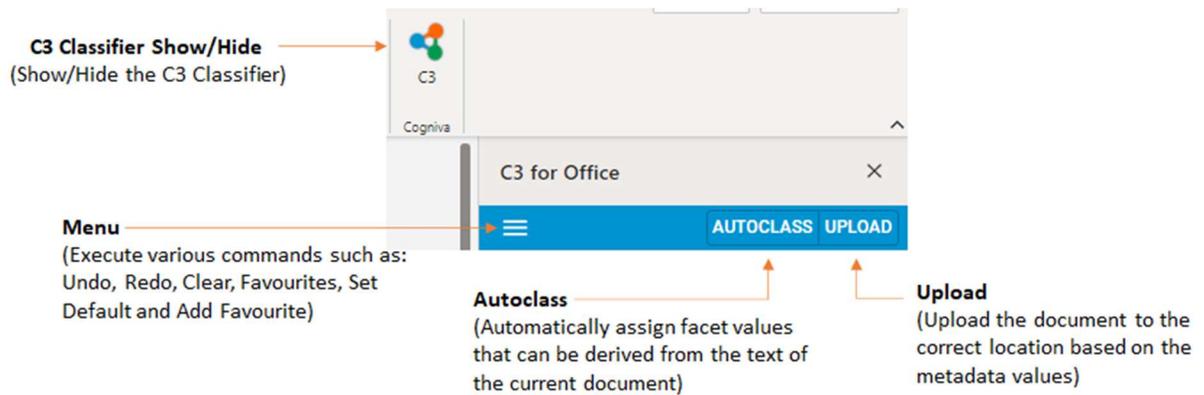
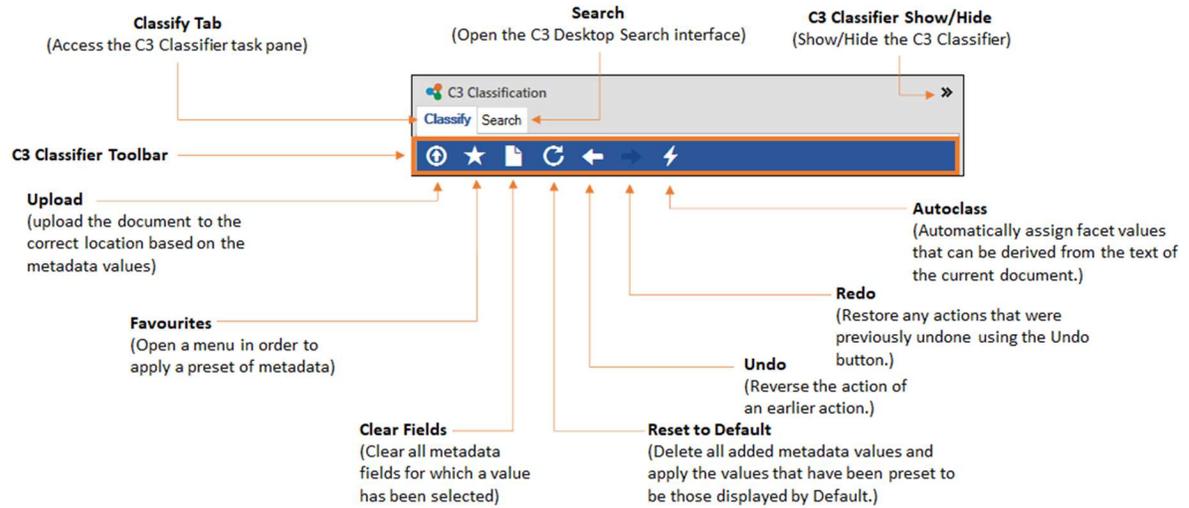
The user can select the metadata values either by typing in the fields, which support type-ahead, or by selecting from dropdown fields. If the user hovers their cursor over a field title, they will get a tooltip describing field use. C3 makes use of filters that may constrain available values in other fields in order to only show relevant metadata fields and values to the user.

### 2.1. Overview of the C3 Classifier Interface

The C3 Classifier interface appears on the right side of any Microsoft Office application, either in full view of the user, or as the C3 Action Bar. When opened, it displays metadata fields and is comprised of the Classify and Search tab as well as the C3 Classifier toolbar. The tool bar contains the following icons: Save, Favourites, Clear Fields, Reset to Default, Undo, Redo, and Autoclassification. There is also the Classify tab that allows the user to navigate the metadata fields, in the interface, as well as the Search tab that allows the user to search previously classified documents.

The C3 Classifier Toolbar, shown at the top of the classification panel provides the following features:

- Upload: Save the document to a preset location
- View Favourites: Set / re-use values for files
- Clear: Removes all metadata values
- Reset: Resets values to default starting state
- Undo/Redo: Undo/Redo on value selections
- Autoclass: Invokes C3 value prediction where enabled
- Show/Hide: Shows or hides the C3 Classifier Interface



The C3 Classifier Interface consists of the following three sections comprised of metadata fields:

- Core Fields: Metadata fields displayed for all users
- Contextual Fields: Metadata fields which only show up when certain conditions are met
- More section: Metadata fields whose values are auto populated

The diagram illustrates the C3 Classifier Interface, divided into two main windows: 'C3 for Office' and 'C3 Classification'.

**C3 for Office:** This window features a navigation menu with 'Core Fields', 'Contextual...', and 'More...' sections. The 'Core Fields' section lists 'Author', 'Role', 'Process', 'DocumentType', 'Destination' (with a 'Sales' tag), and 'Security Classification'. The 'Contextual...' section lists 'ClientName' and 'ClientReferenceNo'. A 'More...' button is located at the bottom of the list.

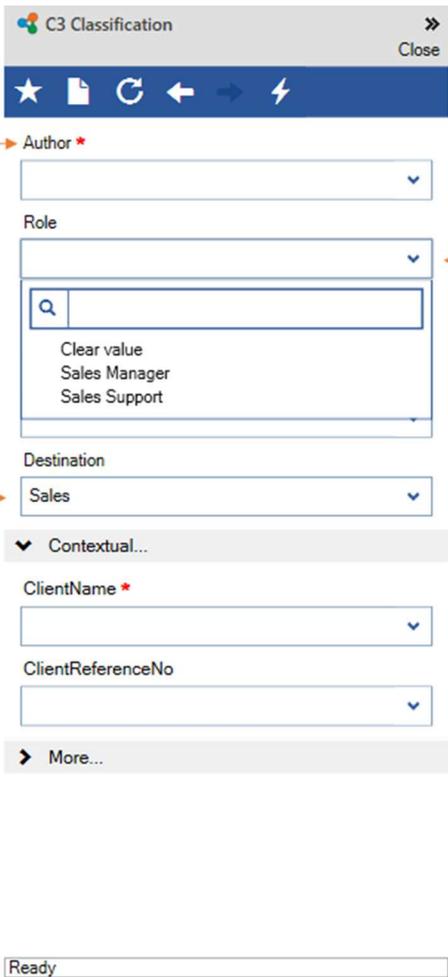
**C3 Classification:** This window displays the selected fields from the 'C3 for Office' interface. It includes a toolbar with navigation icons and a 'Close' button. The fields are organized into sections: 'Core Fields' (Author, Role, Process, Document Type, Destination) and 'Contextual...' (ClientName, ClientReferenceNo). A 'More...' button is also present at the bottom of the field list.

**Annotations:**

- Core Fields** (These are standard fields that appear to all users they are always visible) - Points to the 'Author', 'Role', 'Process', 'DocumentType', and 'Destination' fields in both windows.
- Contextual Fields** (These fields only appear when a selection is made in the core field uses business rules and relationships to expand) - Points to the 'ClientName' and 'ClientReferenceNo' fields in both windows.
- More button** (Displays the fields normally hidden from the user. The values of these fields are usually filled in automatically) - Points to the 'More...' button in both windows.

## 2.2. Selecting Values

The C3 Classifier Interface displays metadata fields and allows the user to select metadata values. These metadata values are assigned to the opened document. To choose a metadata value select a field and then choose the value from the drop-down list. Some metadata values are filtered by business rules; certain functions will have only a select amount of processes available.



The screenshot shows the C3 Classification interface with the following elements:

- Metadata Field:** "Author \*", "Role", "Destination", "ClientName \*", and "ClientReferenceNo".
- Metadata Value:** "Sales" (under Destination), "Clear value", "Sales Manager", and "Sales Support" (under Role).
- Down Arrow:** A blue arrow pointing down, indicating the action to display the drop-down list.

**Metadata Field**  
(Metadata element which is used to classify content, which may be supported by a controlled list of terms or values)

**Metadata Value**  
(Predefined value for a metadata field)

**Down Arrow**  
(Displays drop-down list containing metadata values)

Ready

**Metadata Field**  
(Metadata element which is used to classify content, which may be supported by a controlled list of terms or values)

**Metadata Value**  
(Predefined value for a metadata field)

**Drop-Down List**  
(Displays drop-down list containing metadata values)

The screenshot shows the 'C3 for Office' window with a menu bar containing 'AUTOCLASS' and 'UPLOAD'. Below the menu bar, there are sections for 'Core Fields' and 'Contextual...'. The 'Core Fields' section includes 'Author', 'Role', 'Process', 'DocumentType', 'Destination' (with a 'Sales' tag), and 'Security Classification'. The 'Role' field is expanded to show a drop-down list with the following values: 'Office Manager', 'Sales Manager', and 'Sales Support Representative'. The 'Contextual...' section includes 'ClientName' and 'ClientReferenceNo'. A 'More...' link is at the bottom.

\*Note: if a mistake in the selection happens, use the Undo button from the C3 Classifier Toolbar

### 2.3. Using C3 Autoclassification

The user can activate C3 Autoclassification functionality, by clicking on the Autoclass button. C3 looks at the document, and provides suggestions for fields where it is setup, metadata fields are filled in where matches are made with metadata values. The purpose is automation and increased consistency of applied values, reducing the selections the user needs to make.

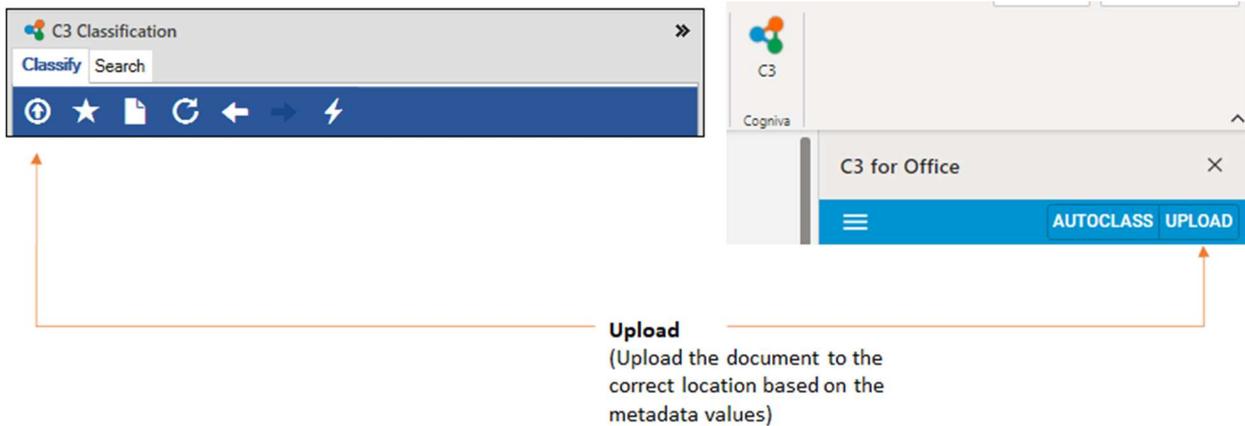
**Autoclass**  
(Automatically assign facet values that can be derived from the text of the current document)

The image shows two parts of the interface. On the left is the 'C3 Classification' toolbar, which includes a 'Classify' button, a 'Search' field, and a set of navigation icons (undo, redo, refresh, etc.). On the right is the 'C3 for Office' window, which has a 'C3' logo and a 'Cogniva' label. The 'C3 for Office' window has a menu bar with 'AUTOCLASS' and 'UPLOAD' buttons. An arrow points from the 'Autoclass' label to the 'AUTOCLASS' button in the 'C3 for Office' window.

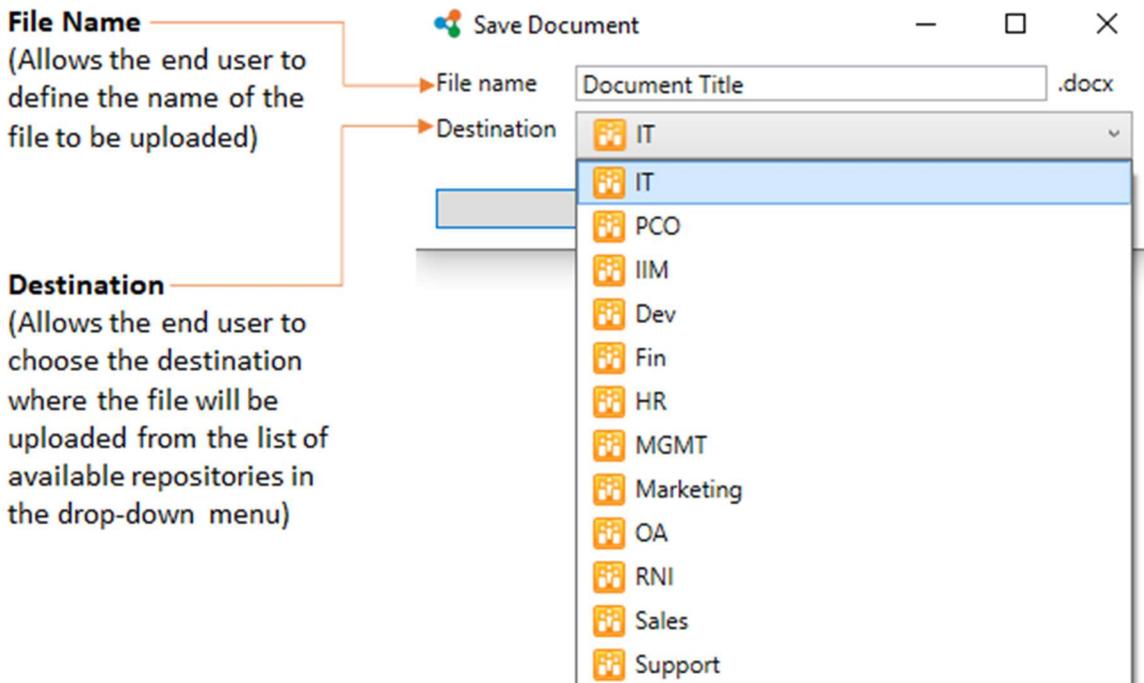
\*Note: the C3 Autoclassification functionality only work if it is set-up.

## 2.4. Saving and Uploading

The Upload button allows the end-user to upload the document to the correct location based on the selected metadata values.

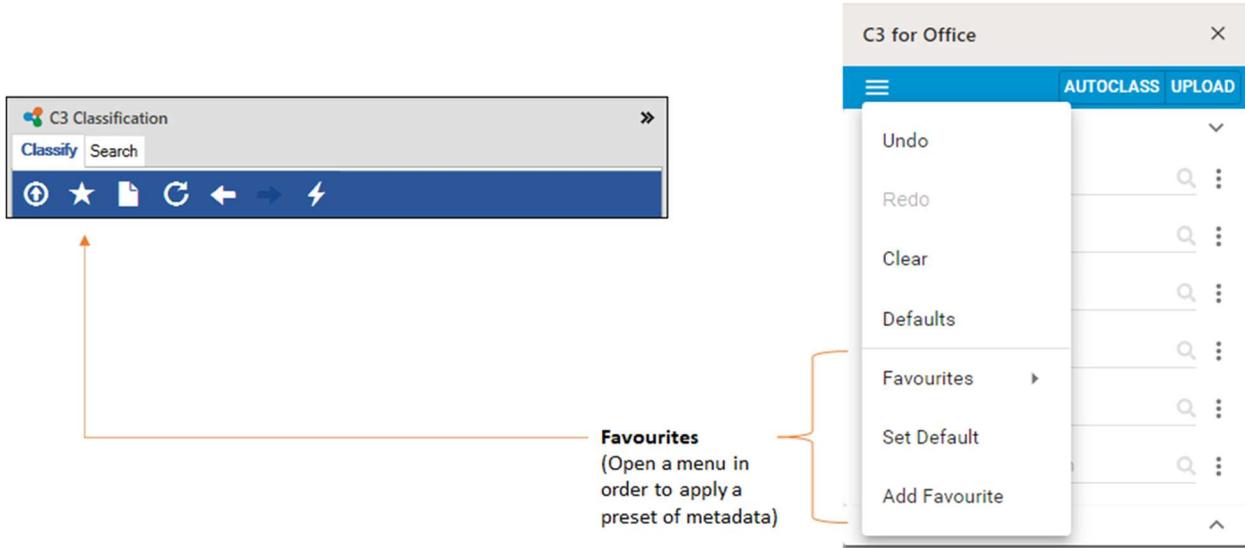


After choosing the Upload button, the user is prompted to fill out the Upload Document window. The user now needs to define a File Name and choose a Destination for the document.

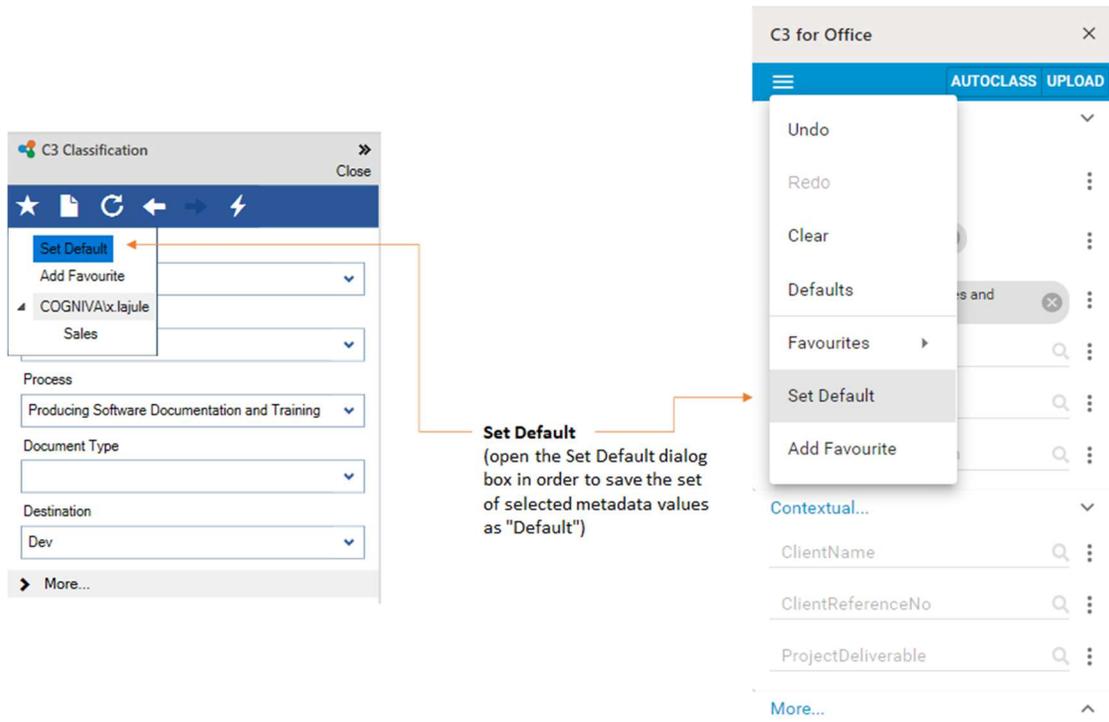


## 2.5. Using Favourites

The user can set up a favourite sets of metadata values. The Default option populates the chosen metadata values each time the user classifies a document. The favourites populate metadata values based on the chose Favourites set.



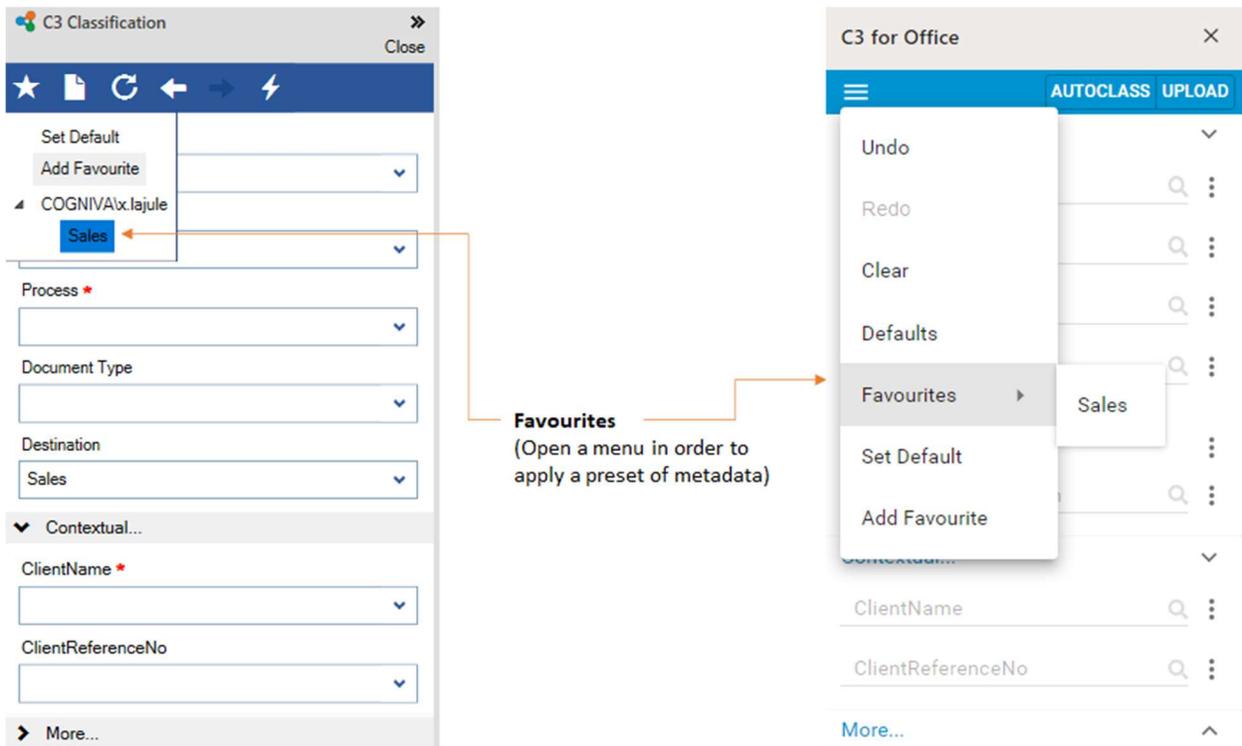
To set up the Default option, the user chooses the metadata values and selects the Save Default option in the Favourites menu.



To set up Favourites, the user chooses the metadata values and select Save Favourites in the Favourites menu. The user is then prompted to fill out the Add Favourite window.

- Name: Name of the Favourite set
- Group: Hierarchical group of Favourite sets

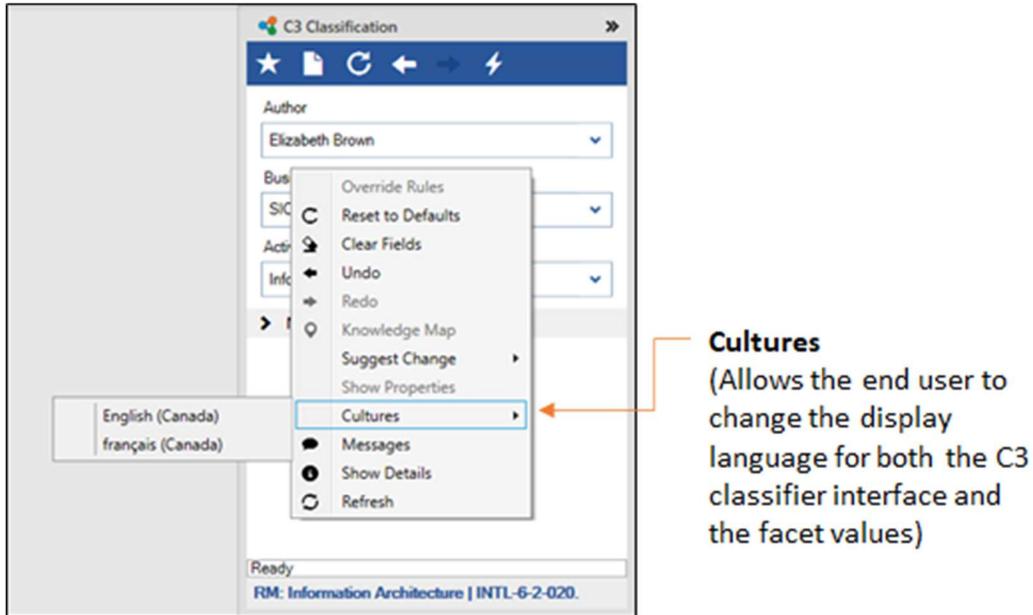
To select a Favourite set, the user chooses from the Favourites menu.



\*Note: Default should be used for the metadata values every time a document is classified. Favourites should be used when the same set of metadata values is required regularly.

## 2.6. Changing Languages/Cultures

The user can change the classification display language, based on their preference. To do this, the user right-clicks on the C3 Classifier Interface and selects the Cultures option. The user then selects the Culture of their choice to change the language of the C3 Classifier Interface, the metadata fields and the metadata values.



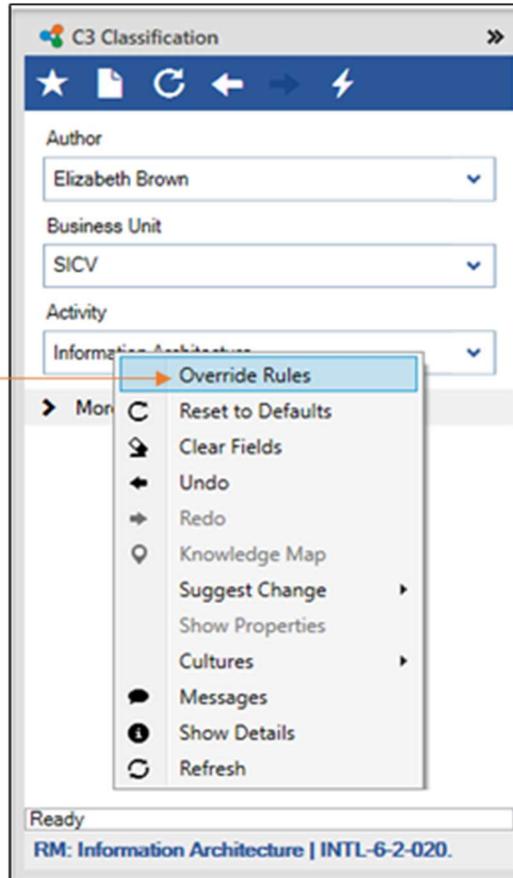
Note: In the online version of C3, the user can change the language by changing the language of their browser.

## 2.7. Overriding rules

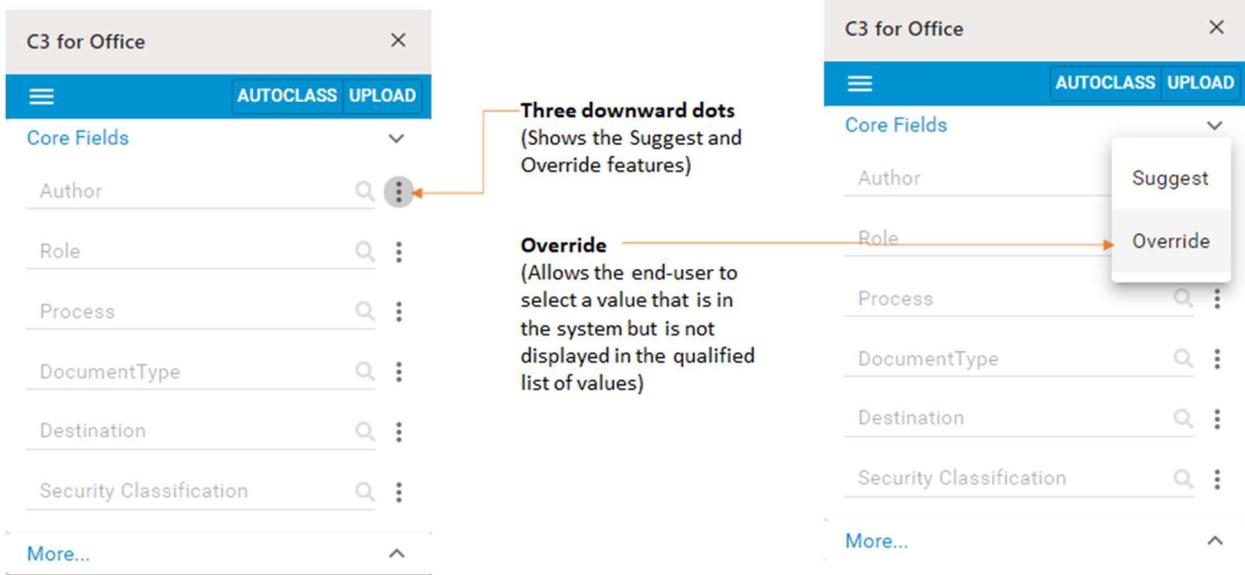
If the user cannot find the appropriate metadata value in the filtered choices, they can override these filters. To have access more metadata values, the user right-clicks on the C3 metadata value field and selects Override Rules. This allows the user to choose from all the metadata values in the model.

### Override

(Allows the end-user to select a value that is in the system but is not displayed in the qualified list of values)



In the online version of C3, the user clicks on the Ellipse button, then selects Override.

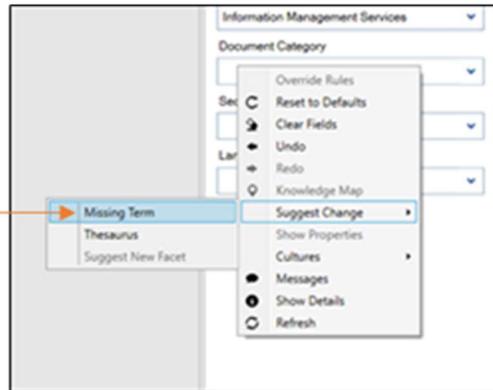


\*Note: The user can allow override the rules if this property has been selected for the metadata field.

## 2.8. Suggesting Values

If the user cannot find the appropriate metadata value, they can suggest a Missing Term to the model manager. To do this, the user right-clicks on the C3 Classifier Interface and selects the Suggest Change option.

**Missing Term**  
(Allows the end-user to open the Suggest New Term window in order to suggest to add a missing term to the C3 Model)



The user is then prompted by the Suggest New Term window to fill out the Parent field, the Term, and a Description.

- Parent: identifies the term as a sub-term, beneath an existing term (optional)
- Term: identifies the requested metadata value
- Description: provides more details about the request to the C3 Model Manager

**Parent**  
(Allows the end user to select, from a drop-down menu, the parent (metadata field) under which the suggested term will appear)

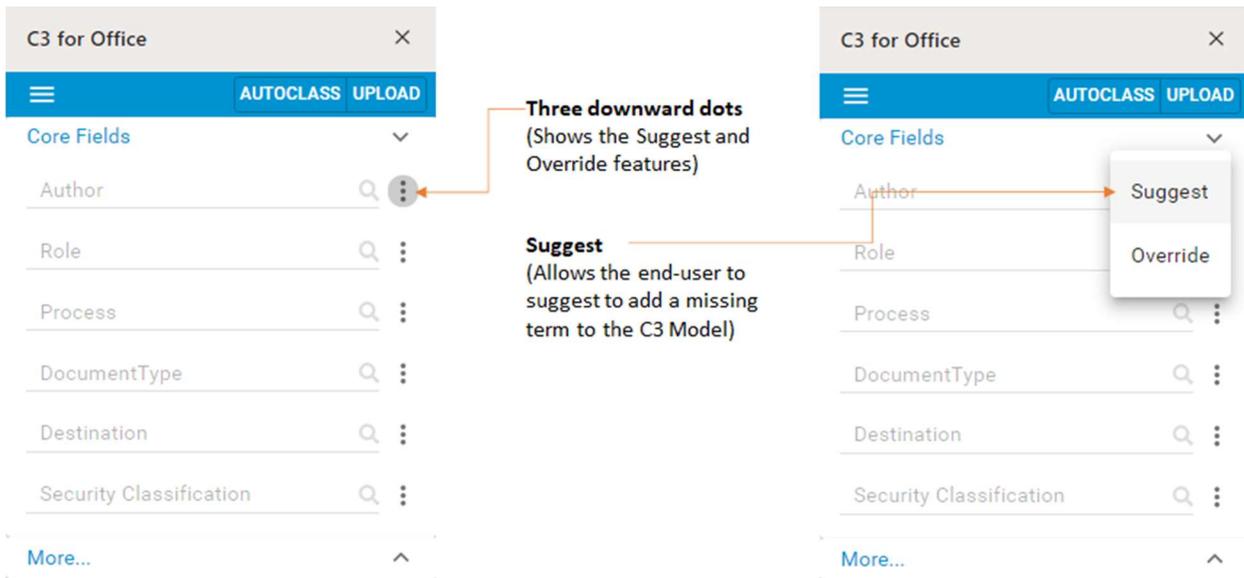
**Term**  
(Allows the end-user to enter the name of the new term they wish to add to the C3 Model)

A screenshot of the 'Suggest New Term' dialog box. It has a title bar with a close button. The dialog contains three input fields: 'Parent:' with a dropdown arrow, 'Term:' with a text input field, and 'Description:' with a larger text input area. At the bottom right, there are two buttons: 'Suggest' and 'Cancel'.

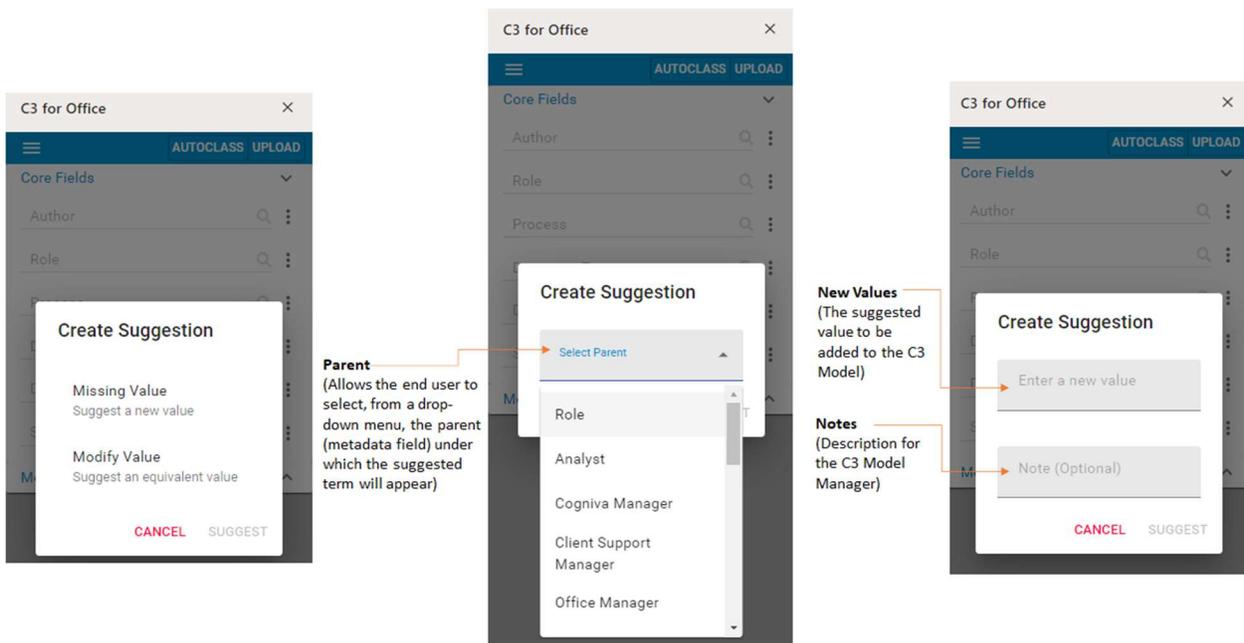
**Description**  
(Allows the end user to add a description for the new term he or she wants to suggest)

This suggestion is then approved or rejected by the C3 manager.

In the online version of C3, the user clicks the ellipse, then selects Suggest.



The user is then prompted to create a suggestion for a Missing Value or to Modify Value.



## **2.9. Sensitivity Labels**

Sensitivity Labels allow the user to add a security classification to the document. This feature is usually triggered when a sensitivity facet is chosen or auto populated. The permissions will follow once the labels are selected. Watermarking is added to the document.

\*Note: This feature needs configuration by C3 Admin. Only for on SharePoint On-premises. For Office 365, the sensitivity labels are applied upon upload.

## **2.10. Retention Labels**

Retention Labels indicate the retention and disposition schedule for a document. Retentions are applied by rules by C3, not by users. This feature is set up withing SharePoint.

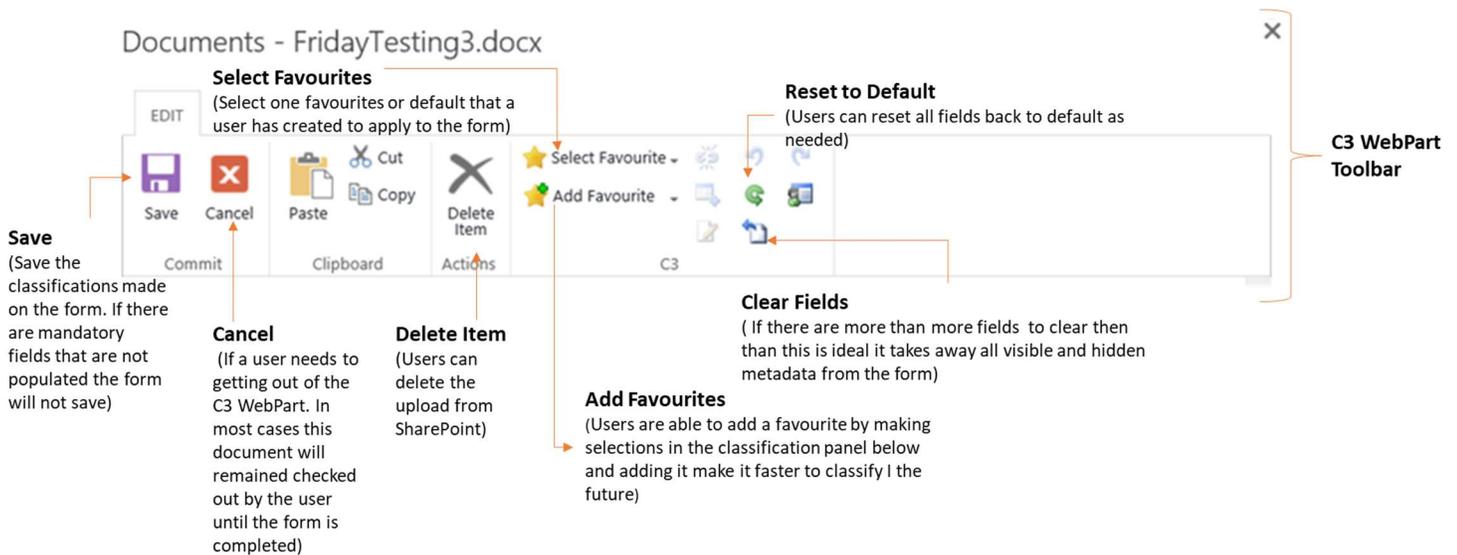
### 3.0 C3 SharePoint WebPart

The C3 SharePoint WebPart is a version of the C3 Classifier that is used to integrate in SharePoint on premise. The C3 SharePoint WebPart assigns C3 metadata to selected documents using an interface similar to the C3 Classifier Interface. The C3 SharePoint WebPart there is the ability to add both C3 metadata fields and SharePoint metadata fields. It is no longer available or supported in C3 5.1.0.4 or higher.

### 3.1 C3 SharePoint WebPart Tool Bar

The C3 SharePoint WebPart is comprised of the C3 SharePoint WebPart Tool Bar as well as the C3 SharePoint WebPart Classification Section.

The C3 WebPart toolbar contains the following icons: Save, cancel, Paste, Cut, Copy, Cancel Item, Select Favourite, Add Favourite, Clear Fields, and Reset to Default.



### 3.2 C3 SharePoint WebPart Classification Section

The C3 SharePoint WebPart displays the metadata fields and values as well as displaying the dropdown list that contains the metadata values that can be chosen. As each value is chosen, the remaining values for each facet are reduced and auto completed where possible.

The form displays in two parts SharePoint and C3 fields. It is not always necessary, but the SharePoint fields section can be used for library specific fields that only apply to that library where as C3 fields are more globally developed to be used organization/enterprise wide. In the example below the SharePoint section only has Name of the document and title fields which are SharePoint specific fields.

The screenshot shows a web browser window titled "Documents - FridayTesting3.docx". At the top is a toolbar with "EDIT" and various icons for Save, Cancel, Paste, Copy, Delete Item, and C3 actions. Below the toolbar is the "C3 SharePoint WebPart Classification Section" form. The form is divided into two main sections: "SharePoint" and "C3".

**SharePoint Section:**

- Name \* (text input field)
- Title (text input field)

**C3 Section:**

- Core Fields (dropdown menu):
  - Author \* (dropdown menu)
  - Organization Name \* (dropdown menu)
  - Document Type Filter (dropdown menu)
  - Document Type \* (dropdown menu)
  - Security Classification \* (dropdown menu)
  - Security Sensitivity (dropdown menu)
  - Prepare for CR \* (dropdown menu)
- Contextual Fields (dropdown menu):
  - Language \* (dropdown menu)
  - Official Document Date \* (text input field)
  - File Plan # \* (dropdown menu)
  - More Fields (dropdown menu)
  - Prepare for Records Library (Clerks Only) (dropdown menu, currently set to "Yes")

**Annotations:**

- Core Fields:** (These are standard fields that appear to all users they are always visible)
- Contextual Fields:** (These fields only appear when a selection is made in the core field uses business rules and relationships to expand)
- Metadata Field:** Official Document Date \*
- Metadata Value:** File Plan # \*
- Down Arrow:** (Displays dropdown list containing metadata values that are available)
- Submit:** (When a user has completed their selections and ready to save metadata to the document)
- C3 SharePoint WebPart Toolbar:** (Points to the top toolbar)
- C3 SharePoint WebPart Classification Section:** (Points to the main form area)

Buttons at the bottom right: Submit, Cancel.