# C3 User Manual

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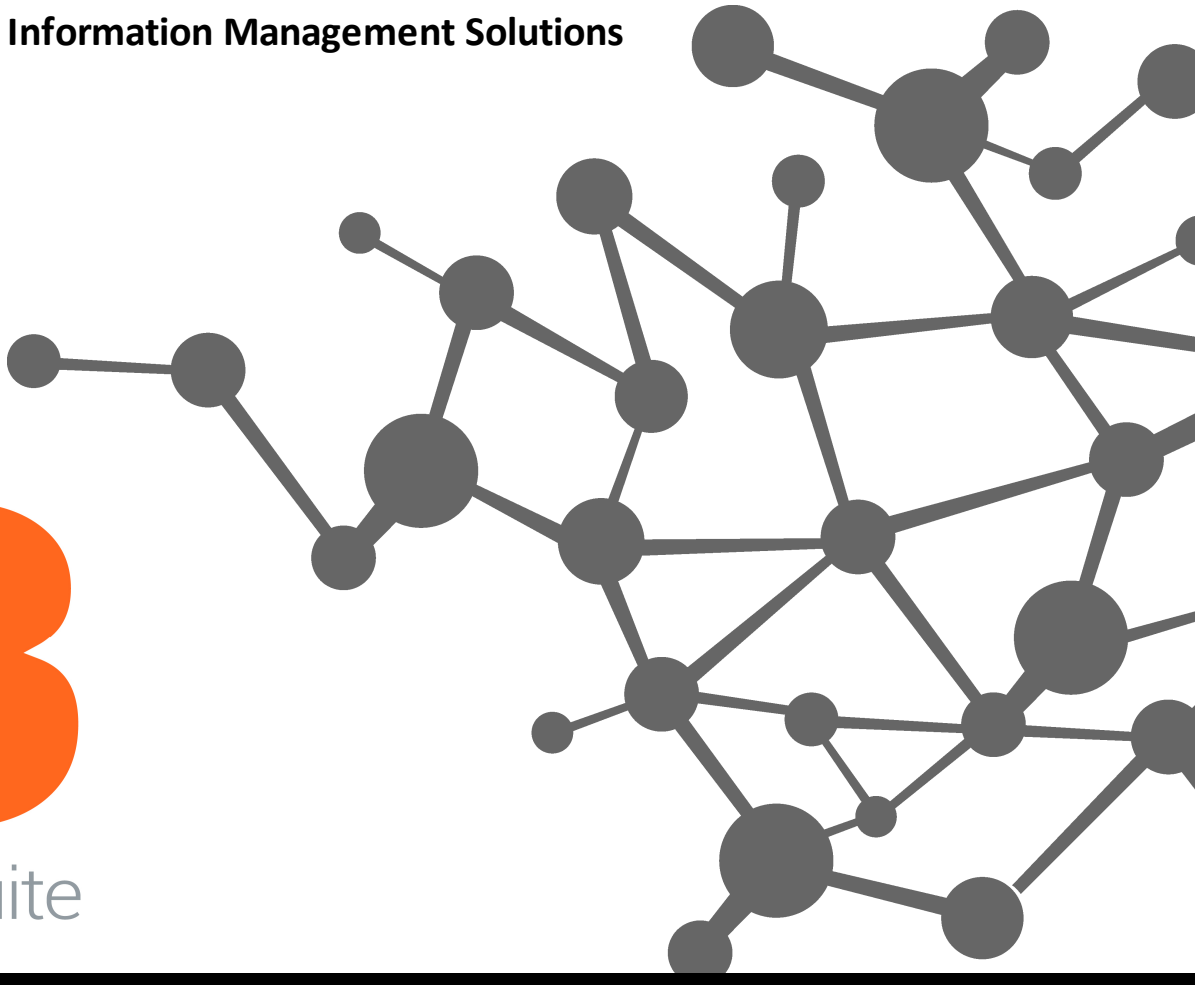
**2.0.0**



software suite

1. What is C3? 3

2. Using the C3 Classifier 5

2.1 Exposing and Hiding the C3 Classifier ..... 7
2.2 Selecting Values ..... 8
2.3 Overriding Rules ..... 11
2.4 Suggesting New Terms ..... 13
2.5 Suggesting a New Thesaurus Value ..... 16
2.6 Suggesting a New Facet ..... 18
2.7 Changing the Language / Culture ..... 20
2.8 Creating Favourites ..... 22
2.9 Watermarking ..... 24
2.10 Configuring User Defaults ..... 25
2.11 Autoclassification ..... 27
2.12 Knowledge Map ..... 28
2.13 Desktop Classifier ..... 31
2.14 Using Intercept Save ..... 34
2.15 Using C3 Desktop Search ..... 35

3. C3 Configuration 40

3.1 The C3 Configuration Interface ..... 41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# What is C3?

Cogniva's content classification solution, C3, provides an interface for the various Information Management (IM) services of the C3 Software Suite as well as backend database integration. C3 is divided into five main components: the C3 Classifier, C3 Server, C3 Designer, C3 Governance Dashboard, and C3 Connectors

C3 incorporates the structure of an enterprise information architecture and the functionality of enterprise information management tools (file plans, metadata frameworks, thesauri, business process mapping and knowledge maps) to form one coherent and easily maintainable entity.

C3 integrates seamlessly with Microsoft Office and Microsoft SharePoint, OpenText eDocs, OpenText Content Server, EMC Documentum and many other content creation and management platforms. C3 can be easily integrated with any custom in-house content creation system through its Web Services.

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). This metadata relates the high-level business context of a document's creation with an accurate description of its content. By doing so, C3 improves how organizations describe, access and group their enterprise content.


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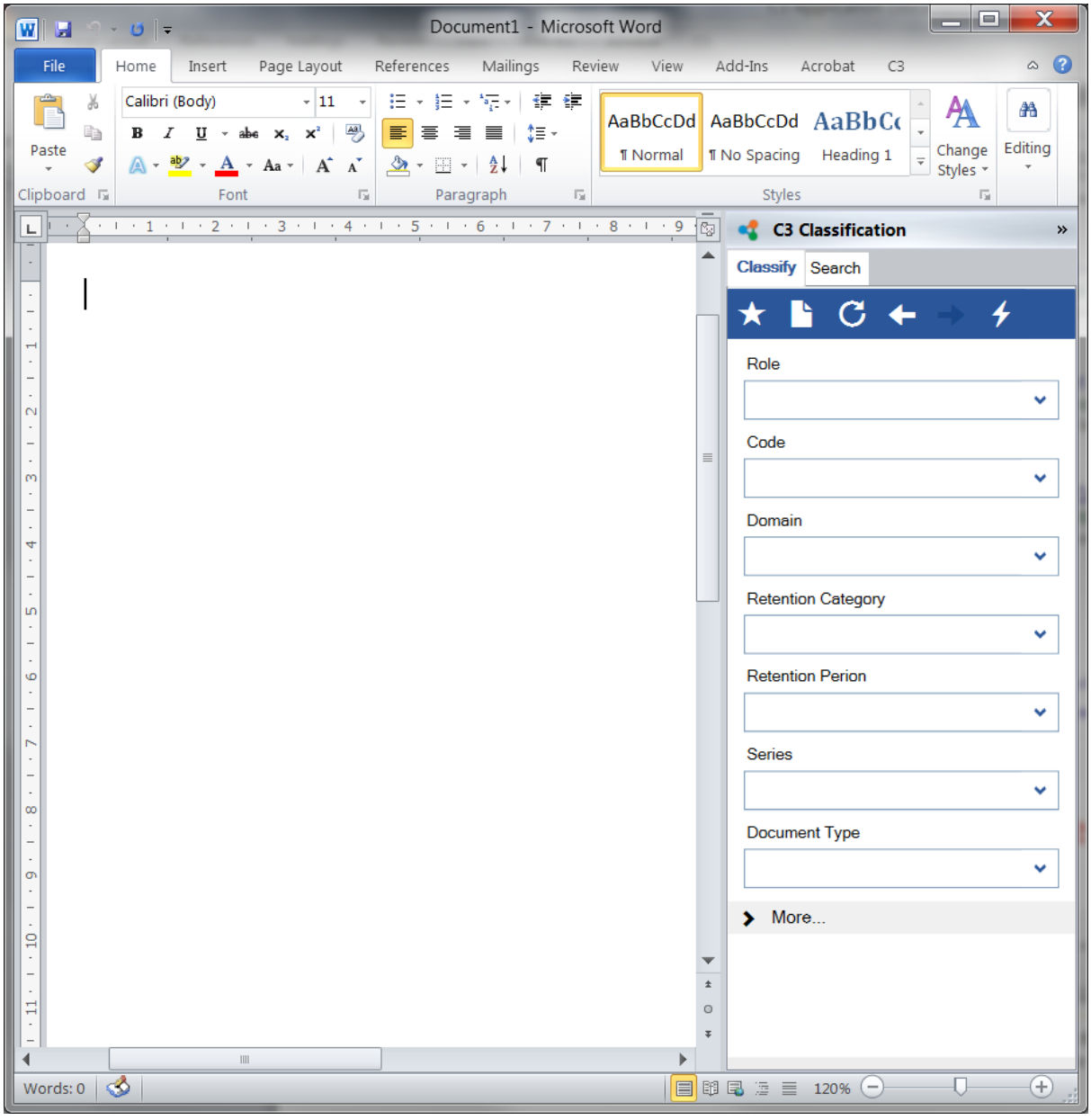
# Using the C3 Classifier

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

C3 provides a classification panel that allows auto-population of facet values. The classification panel displays drop-down lists that show facet values in accordance with the role and responsibilities of the user. The C3 Classifier manages the display and availability of core facets and specific facets, the submission of new facet values, submission of new synonyms, language/culture settings and the creation of new knowledge map entries.





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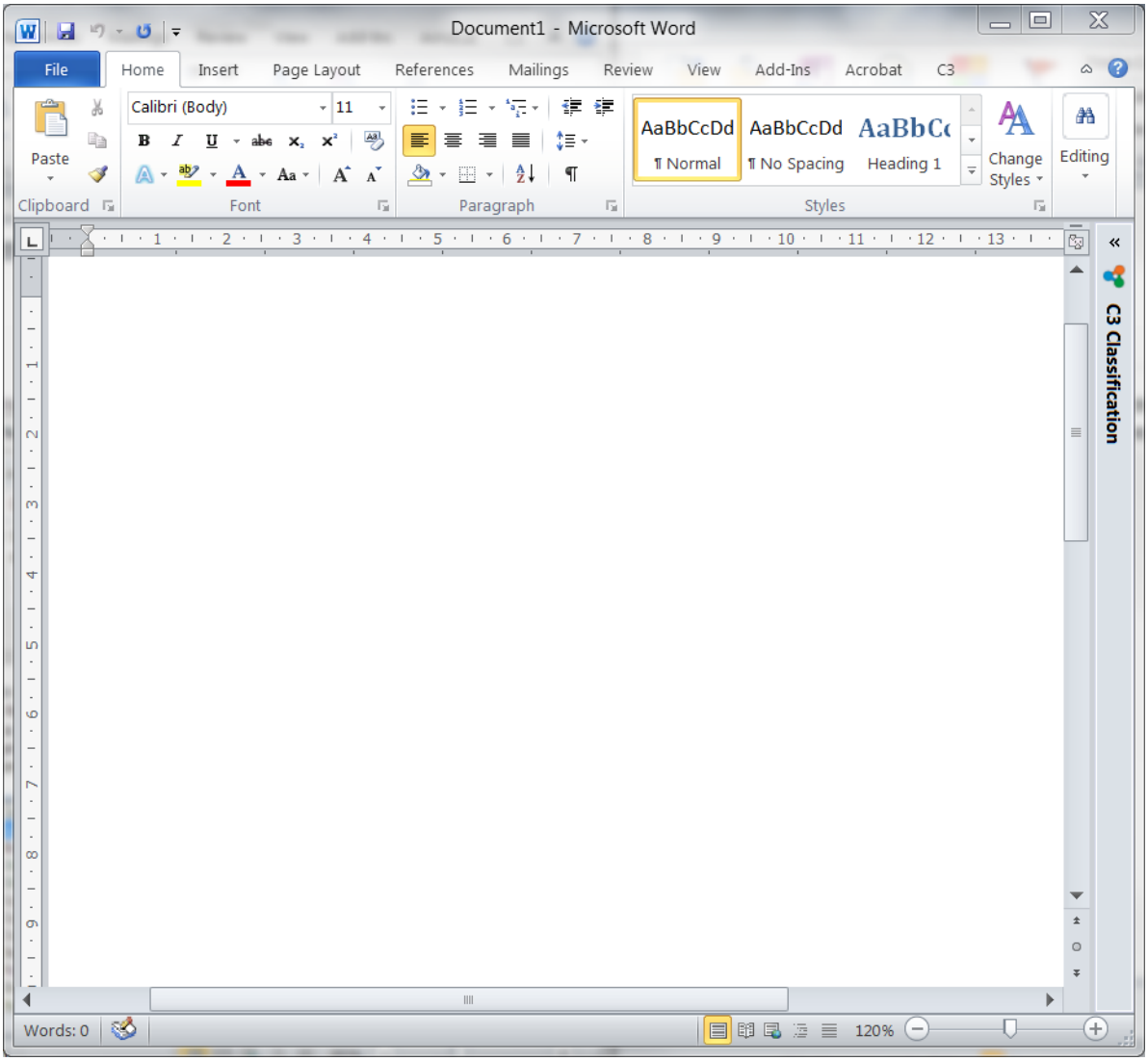
## 2.1 Exposing and Hiding the C3 Classifier

In Microsoft Office, the C3 Classifier can be hidden (see picture below) or displayed on the right side of the screen. To display the C3 Classifier, click anywhere on the ***C3 Action Bar*** or the ***C3 Classifier Show/Hide*** button.
Once facet values have been selected, it is possible to hide the C3 Classifier by clicking the ***C3 Classifier Show/Hide*** button. The C3 Classifier can be displayed at any point.





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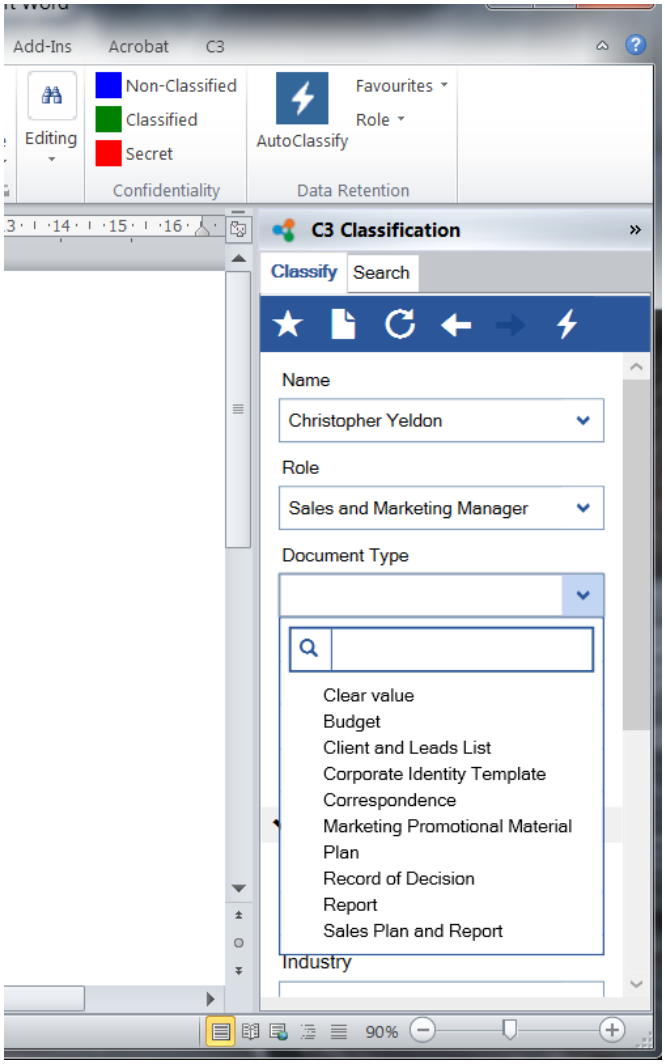
## 2.2 Selecting Values

C3 has been designed to ensure that a document can be tagged and classified in a minimum number of steps (typically no more than three steps).

To classify a document, users must select the appropriate values from the drop-down menu under a given facet in the C3 Classifier. Once this has been done, C3 attaches the selected values to the open document automatically. With Microsoft Office integration, facet values are saved both in the host system database and within the document's properties.

In the following example, the ***Name*** and ***Role*** facets have been populated automatically. There are two reasons for this; the *Name* facet has been automatically populated with the name of the person classifying the document through an Active Directory (AD) connection. The ***Role*** facet has been populated with the value "*Sales and Marketing Manager*" because a pre-established semantic relationship exists between the **name** *"Christopher Yeldon"* and that person's **role**.

(i.e. since "*Christopher Yeldon*" is main role is as the Marketing Manager, this facet value has been set as his default activity).





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Auto-population of the ***Role*** facet was possible because *"Christopher Yeldon"* has only one role. If he had more than one role, the possible choices under the ***Role*** facet would have been reduced to **only the roles assigned to his position** (these roles would be selectable in the role facet's drop-down menu). The same applies to all other facets; values are limited to only what is in the context of the choices already made.

At this point, a value in any facet that has not been auto-populated can be selected. Clicking the down-arrow of the ***Document Type*** facet will display a drop-down menu containing values representing possible tasks that can be accomplished by *"Christopher Yeldon"* in the role of "*Sales and Marketing Manager*". Any out-of-context tasks are hidden from the user.

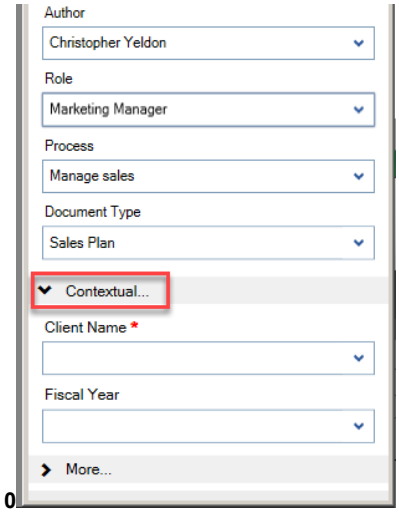
If the facet value you are looking for is not displayed, there are two possible reasons: the semantic relationship rules have eliminated the term you are looking for, or the term does not exist in the taxonomy.

In the first case, it is possible to override semantic rules. In the second case, a new term can be suggested for inclusion in the facet's taxonomy.

In the following example, once a user selects "*Sales Plan"* as a ***Document Type*** facet-value in conjunction with the values *"Christopher Yeldon"* and *"Sales and Marketing Manager"*, two automated events occur:

- Process facet has been auto-populated to "*Manage sales*" because of a semantic relationship.
- A set of contextual fields of specific facets is displayed.

Contextual fields are customizable depending on business requirements, for the purposes of demonstration this example demonstrates how the user can specify an ***Client Name*** when dealing with the ***Manage sales*** **Process.** Only the options that are **in context** are displayed. This simplifies the classification process by hiding inadmissible/irrelevant facet value options from the end-user's view.





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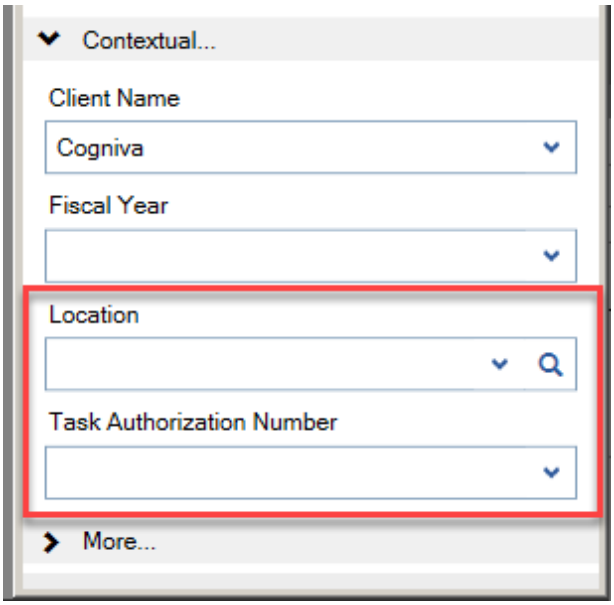
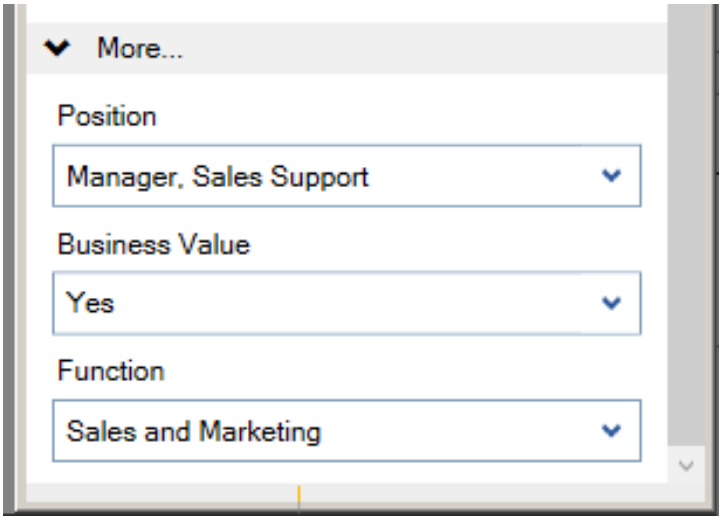
After the ***Client Name*** facet value has been selected in this example, two more contextual fields ***Location*** and ***Task Authorization Number*** appear. Note that there is no specific order in selecting values in facets. C3 is a true multi-dimensional classification engine — each selection will influence what is presented in other facet fields regardless of the order in which they are populated.




Clicking ***More Fields*** will display fields normally hidden to the user. Values in these fields are generally auto-populated, but it is possible to change values that are auto-populated if permission to do so has been granted by the system administrator.





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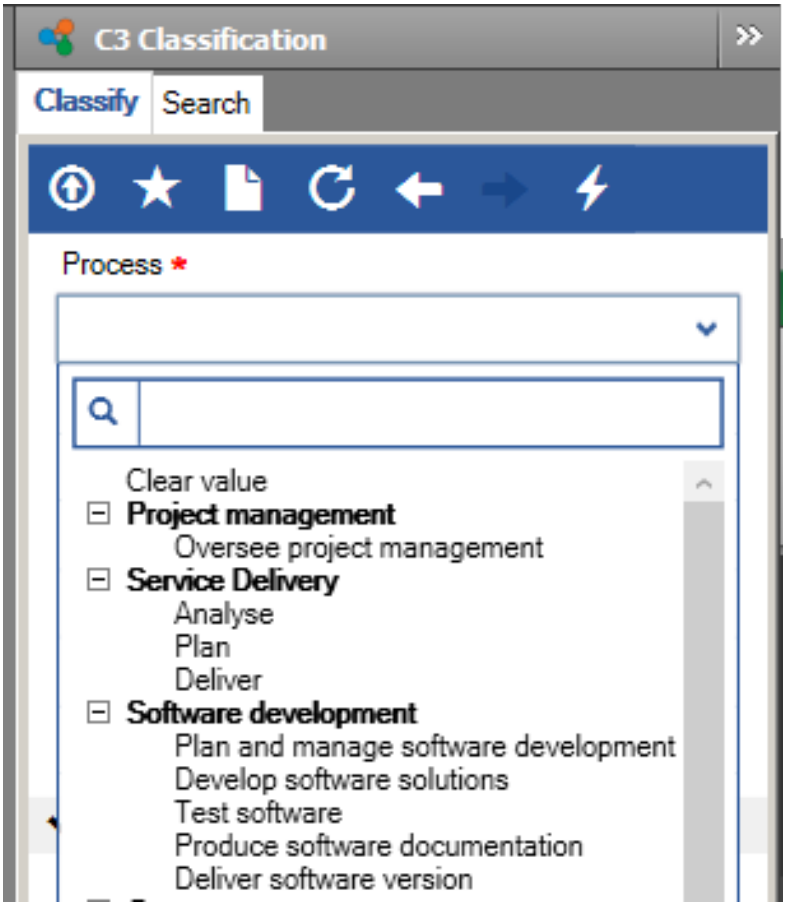
Facet values can be presented as a flat list or a two-to-three level taxonomy. These hierarchically-structured values come from the centralized C3 model. In the example below, facet values are presented as a multi-level taxonomy.




## 2.3 Overriding Rules

Every time a selection is made for any facet (thereby altering the classification "context"), C3 then limits the display of selectable values in the other fields based on pre-established semantic relationships between the facets. This means that some values, even though present in the system, will not be accessible to the end-user. If for any reason a user would like to select a value that is in the system but not displayed in the qualified list of values, it is possible to override semantic rules and display **all** of the selectable values for a given facet. In the example below, some *Role* facet values are not displayed due to semantic rules.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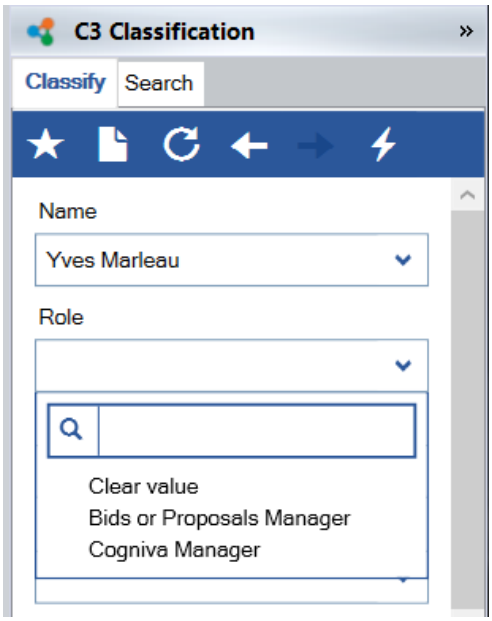
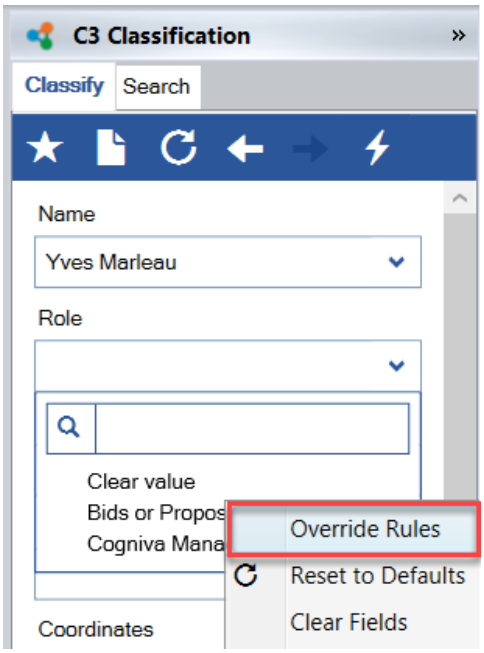



To override the rules, right-click over the facet in question (in this case *Role* and select ***Override Rules***.




Now, if you click the down-arrow button to display the *Role* pull-down menu, **all** facet values for the *Role* facet will be available.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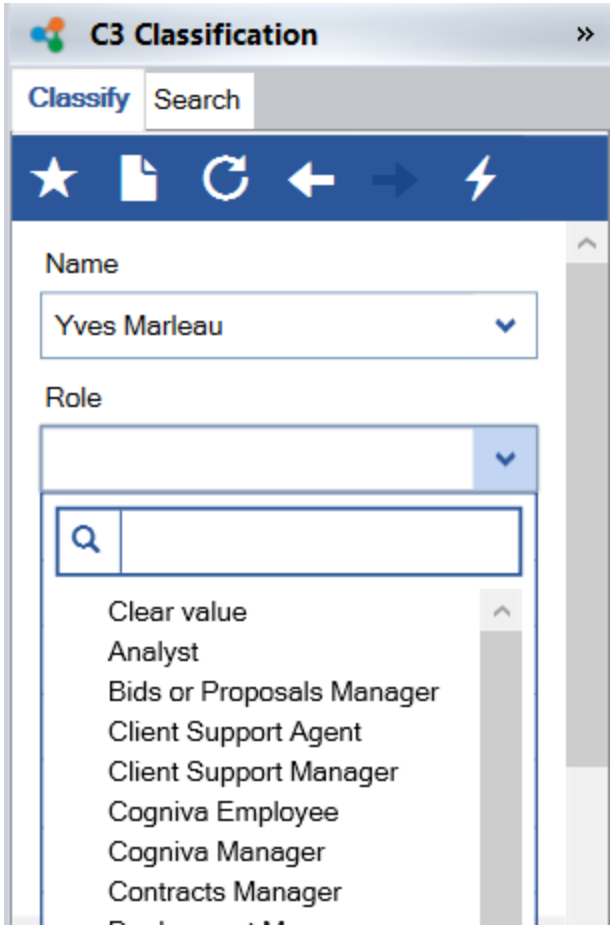


## 2.4 Suggesting New Terms

There is a possibility that some necessary facet values might be missing or that new terms will need to be added to the facet taxonomies.

To suggest a new term, right-click on the facet that contains the taxonomy to which you want to add a term, and click on ***Suggest Change*** (see below). A sub-menu with two options will be displayed. Click on ***Missing Term***.


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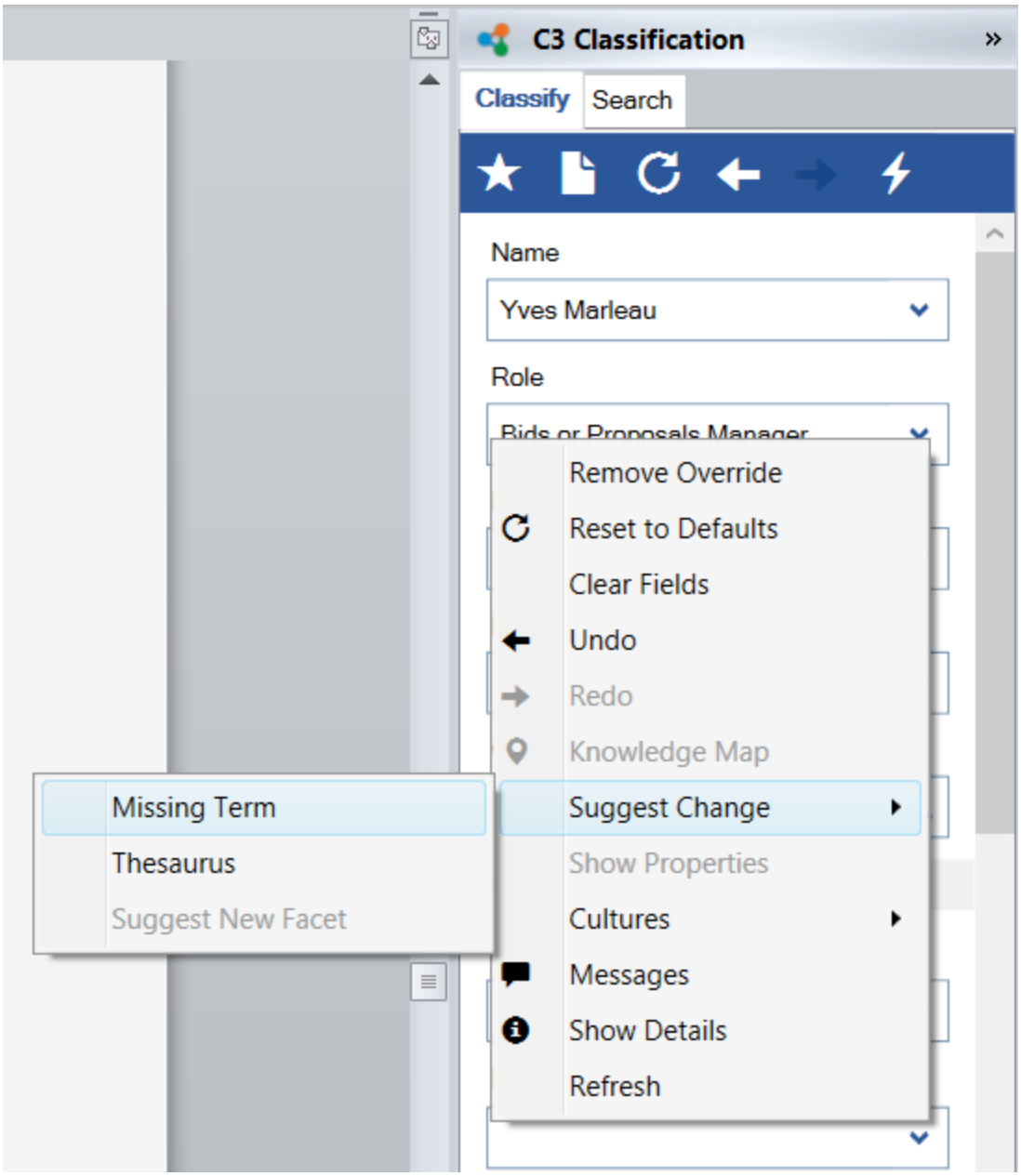



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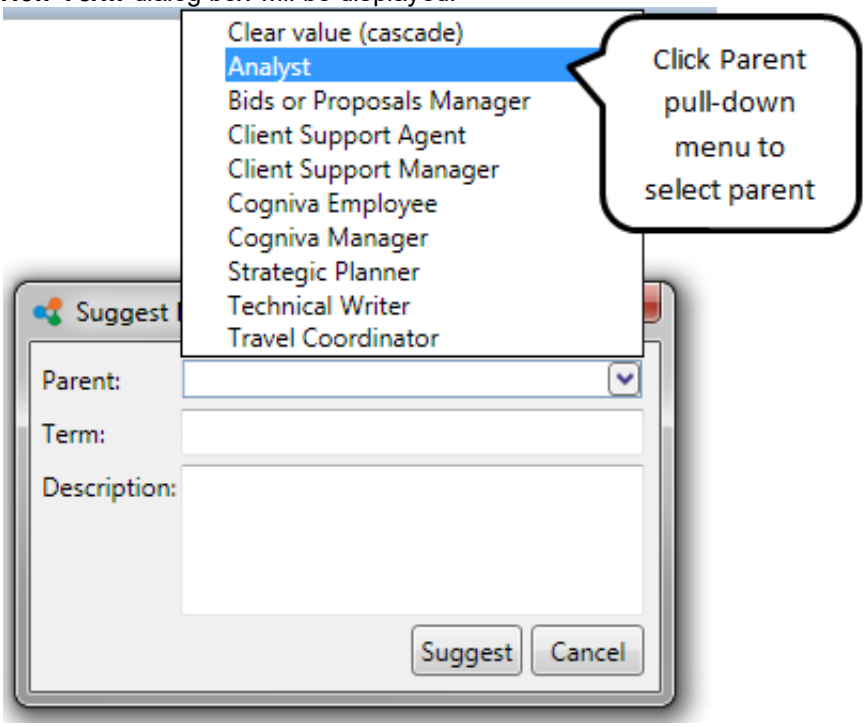
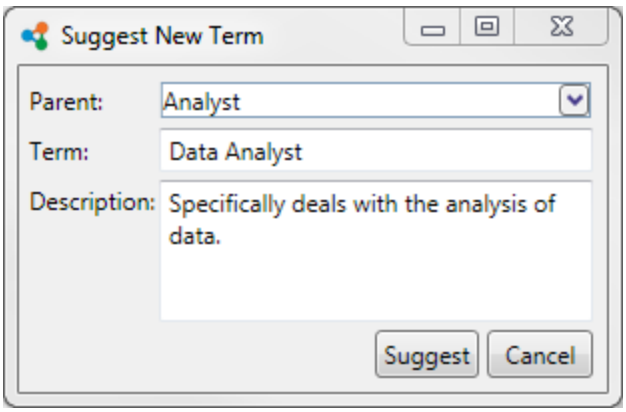
The ***Suggest New Term*** dialog box will be displayed.




Click the *Parent* field drop-down menu to display the facet taxonomy. Select the parent under which you want the term to appear. If you want the term to be inserted at the first level, leave the parent field blank. Enter the term you want to suggest and a description of the term. The description is important because the new term will go through a governance process for approval. Once the new term and its description are entered, click the ***Suggest*** button to submit the suggested new term.





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## 2.5 Suggesting a New Thesaurus Value

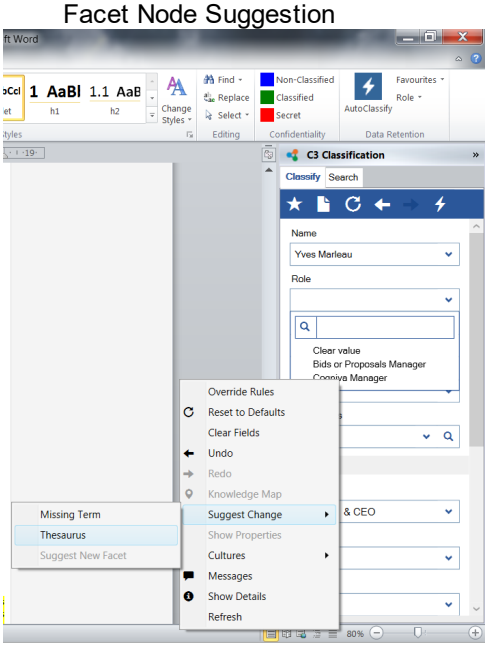
With C3, terms can be 'localized'. This means that it is possible to link an alternative equivalent term to the official corporate terms in the facet taxonomy. This is useful for organizations (or sub-organizations) that have their own linguistic/regional/organizational vocabulary used for classifying documents. These vocabularies are referred to as **cultures**.

Once an equivalent term is added to the taxonomy by a user, the new equivalent term will be displayed to them **instead** of the original corporate term.

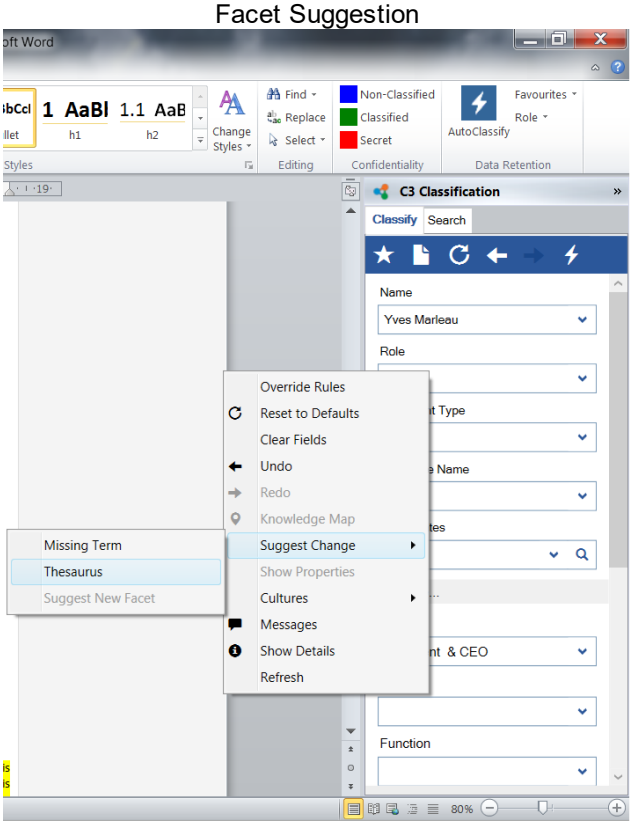
To suggest a new thesaurus term: ***make sure to right-click on the facet value to which you want to suggest a new Thesaurus term BEFORE actually selecting this value (i.e. do so while it is still in the pull-down menu, still unattached to the document). Otherwise, you will be suggesting a new term for the FACET (e.g. ROLE), not the facet VALUE (e.g. COGNIVA MANAGER).***

Next, select the ***Suggest Change*** option. A sub-menu with two options will be displayed. Select ***Thesaurus***.

Facet Node Suggestion




Facet Suggestion





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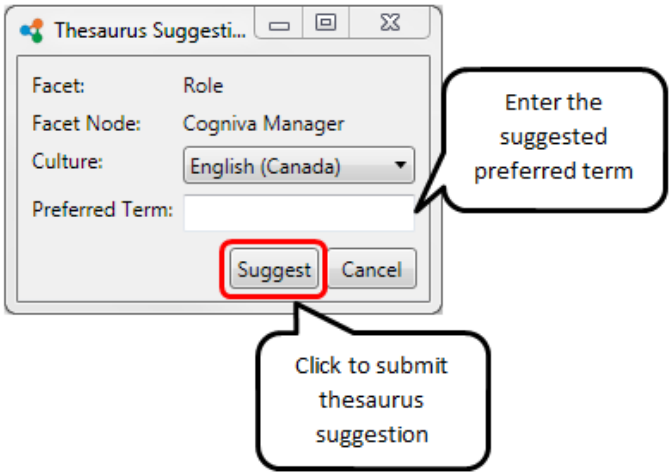
The ***Thesaurus Suggestion*** dialog box will be displayed. In the *Culture* field select the desired "C*ulture"* under which you want to add a new term. Enter the desired preferred term in the *Preferred Term* field and click ***Suggest***.





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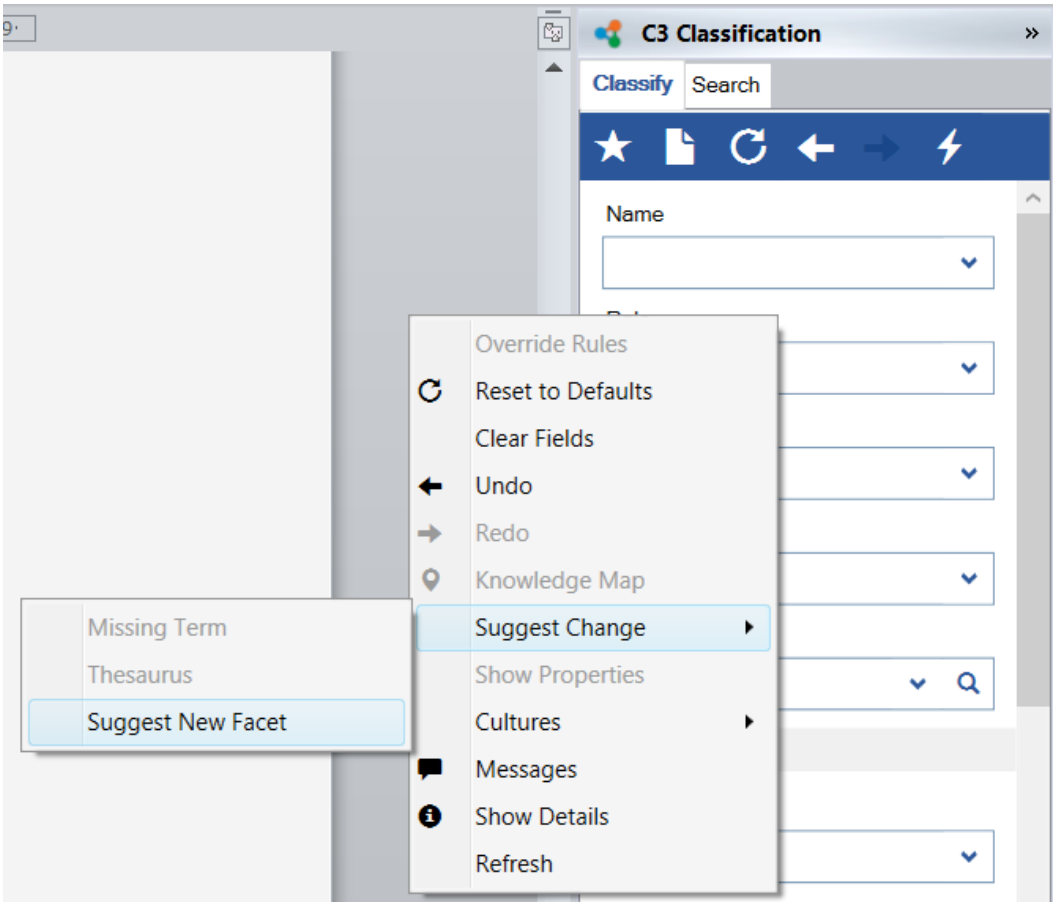
## 2.6 Suggesting a New Facet

In some cases, it might be necessary to request the addition of a new facet. This will occur if, for example, there are organizational changes or new business lines are being added to the organization.

To suggest a new facet, right-click anywhere in the C3 Classifier task pane and select the ***Suggest Change*** option.

A sub-menu will be displayed. Select ***Suggest New Facet***.




The ***Facet Suggestion*** dialog box will be displayed containing two fields that must be completed to suggest a new facet.

Enter the name of the new facet to be added. Enter a description for the new facet and a reason why the new facet should be added. Click ***Suggest*** to submit the suggested new facet.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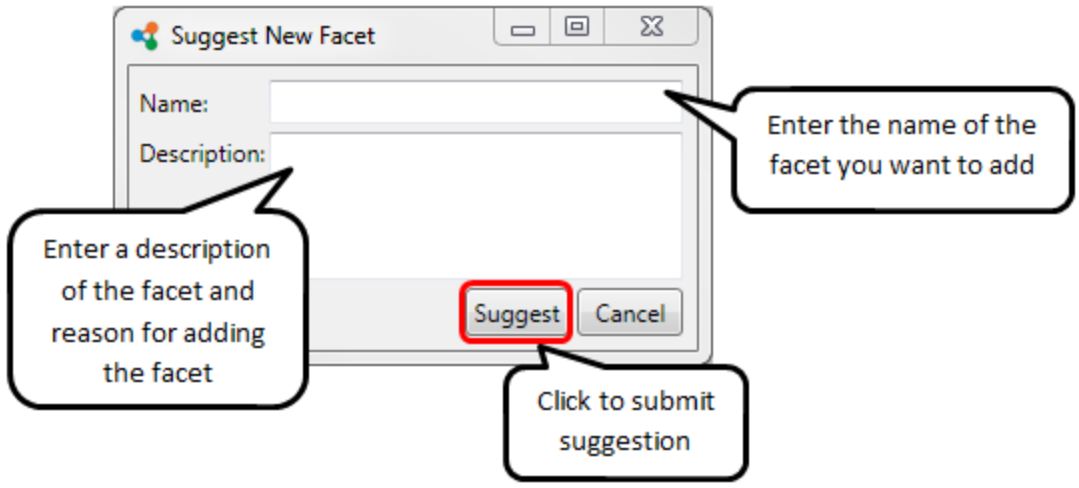


The suggestion will then be routed to the C3 Governance Dashboard for approval. The C3 Administrator and relevant subject matter experts for the facet will review and approve or reject the suggestion. If the suggestion is approved, the new term will be immediately published in the C3 model and made accessible to every platform and every user with proper access rights.


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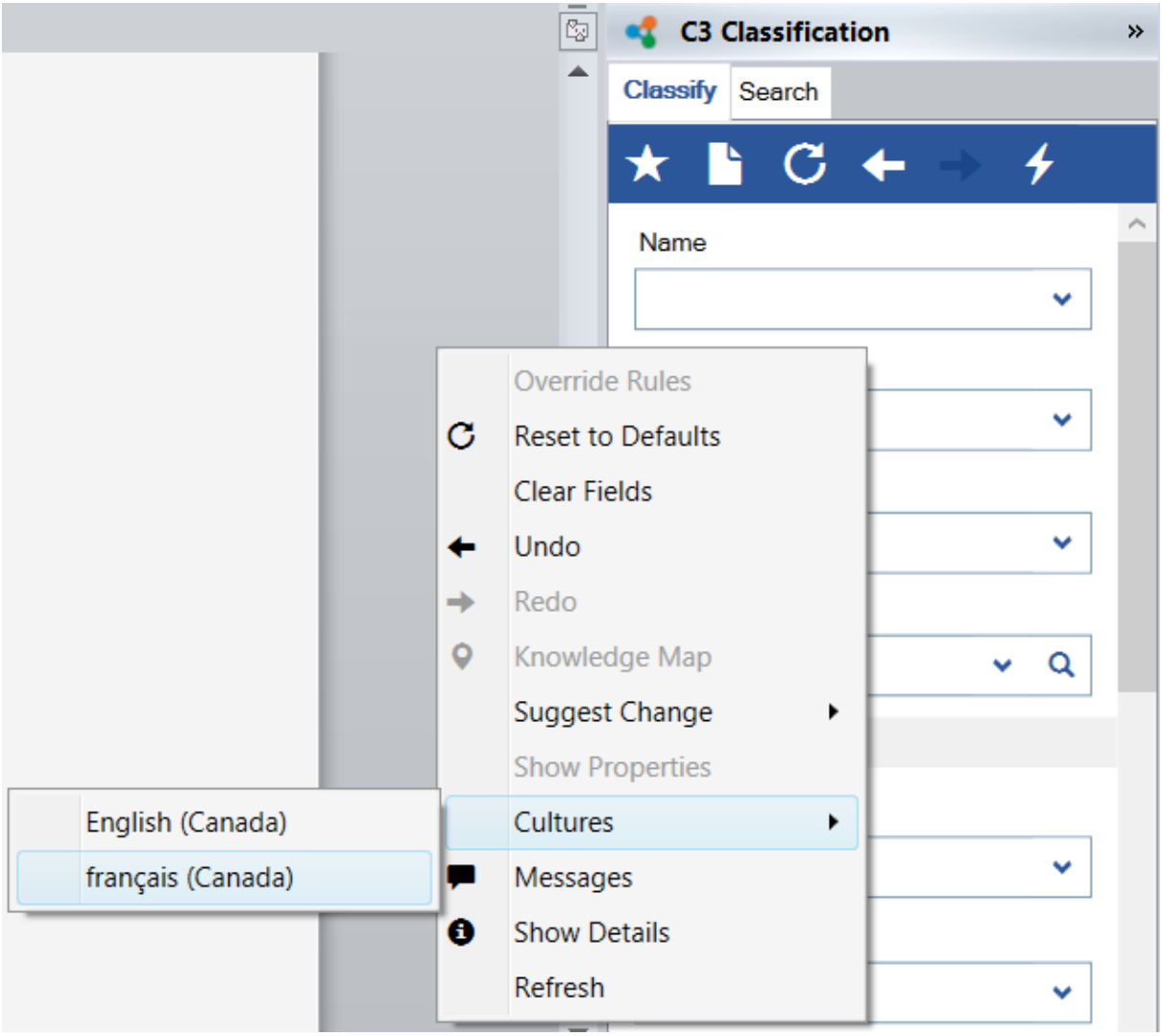
## 2.7 Changing the Language / Culture

C3 allows the display language to be changed for both the C3 Classifier interface and facet values. To do this, right-click on the C3 Classifier pane and select the ***Cultures*** option. Select the culture of your choice. For this example we will select "*français (Canada)*".




Both the C3 Classifier user interface and all facet values will now be displayed in the new selected culture.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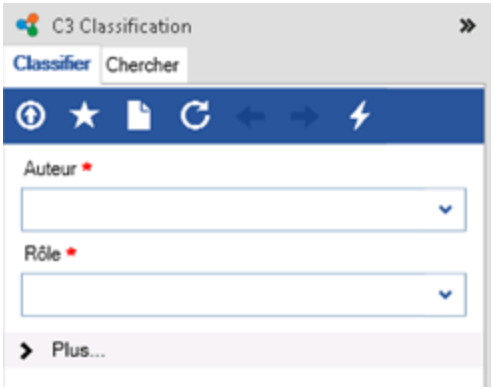



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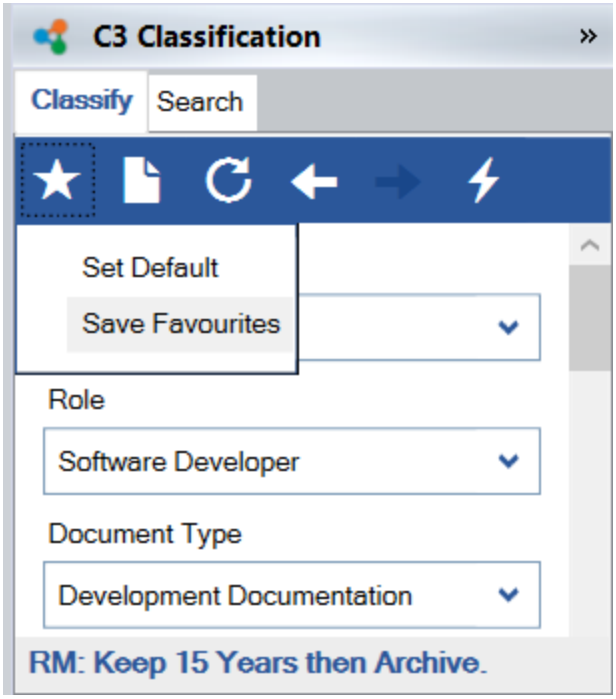
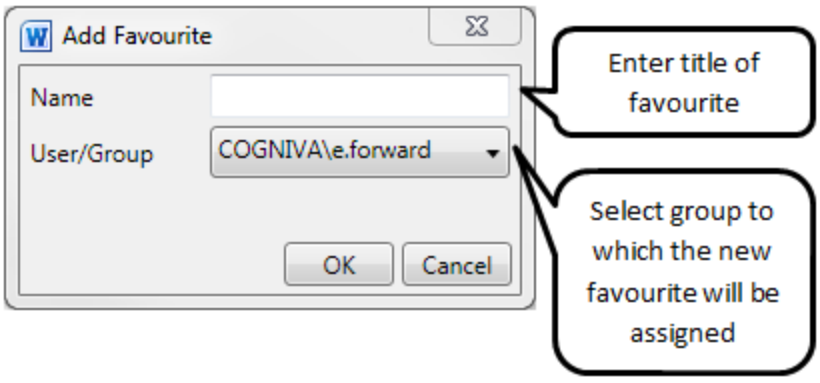
## 2.8 Creating Favourites

C3 allows for the creation of **favourites**. By creating favourites, C3 will enable the user to select and reuse preferred facet values. Favourites can be saved for individual users and/or groups.

Having selected the preferred facet values in the C3 Classifier, click the ***Favourites*** button on the C3 Classifier task bar to name and save the favourite, select ***Save Favourites.***




The ***Add Favourite*** dialog box will be displayed. Enter the name of the favourite in the *Name* field. Click ***OK*** to save the favourite.




**NOTE: There is a 90 character limit to the length of Favourite names**

To select a favourite, click the ***View Favourite*** button.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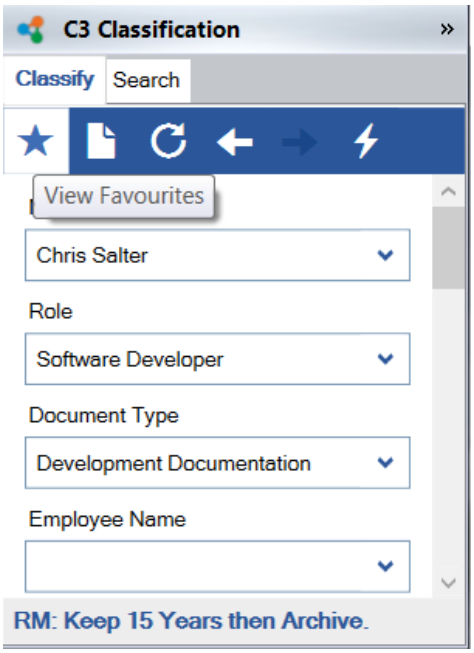
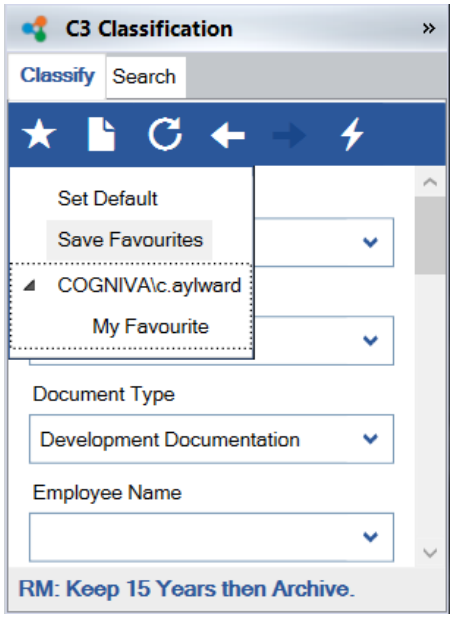



Select the favourite to be retrieved. Facet values will now be populated automatically in accordance with the saved favourite settings. To delete a favourite, right-click the favourite and select ***Delete***.





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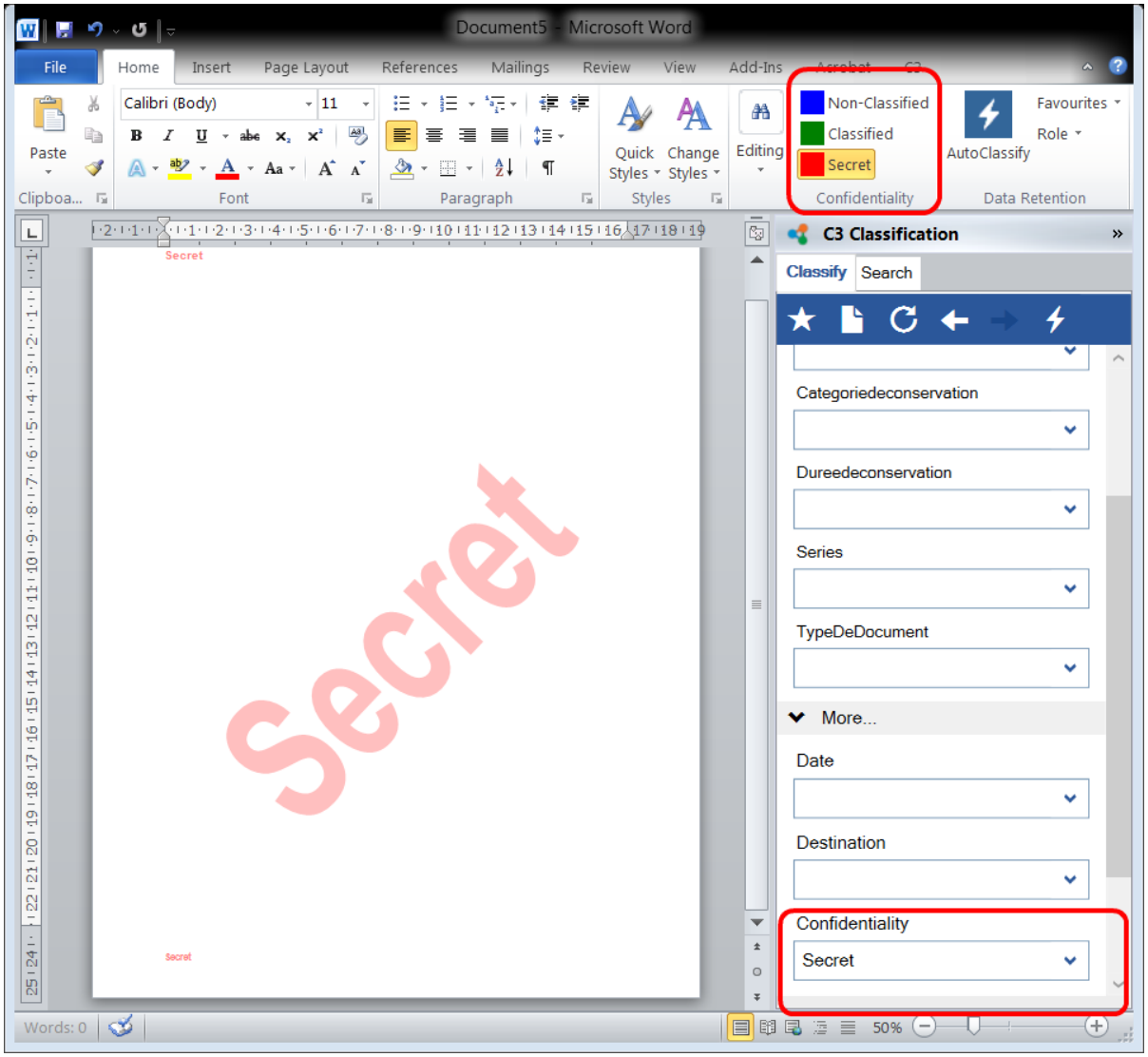
## 2.9 Watermarking

A facet can be dedicated to marking the confidentiality of a document, which can be accessed on both the C3 Classification panel as well as the ribbon on Microsoft Word, Excel, Powerpoint, and Office. In this example, we will be watermarking the level of confidentiality of the document. Selecting the desired confidentiality on either the Classification panel or ribbon will prompt watermarking on the document. this can be configured for either the header, footer, body, or a combination of the three.





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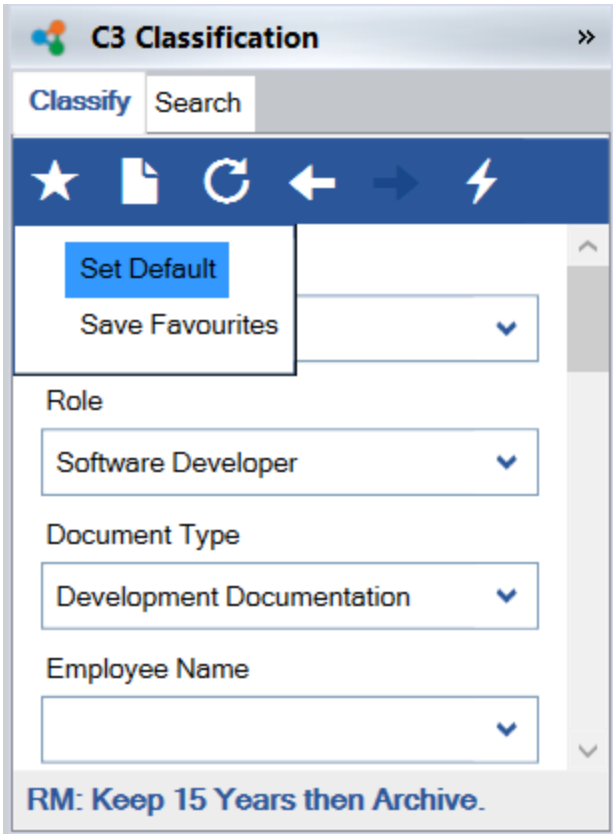
## 2.10 Configuring User Defaults

User defaults can be configured via the task pane in Microsoft Office or the configuration tab of the administration tool.

****Note:** See administration tool documentation for further information on adding user keys.

The star  icon is where user defaults can be set, as shown below.




As shown below, the circular arrow highlighted in red is the reset to defaults feature, where user defaults will be loaded.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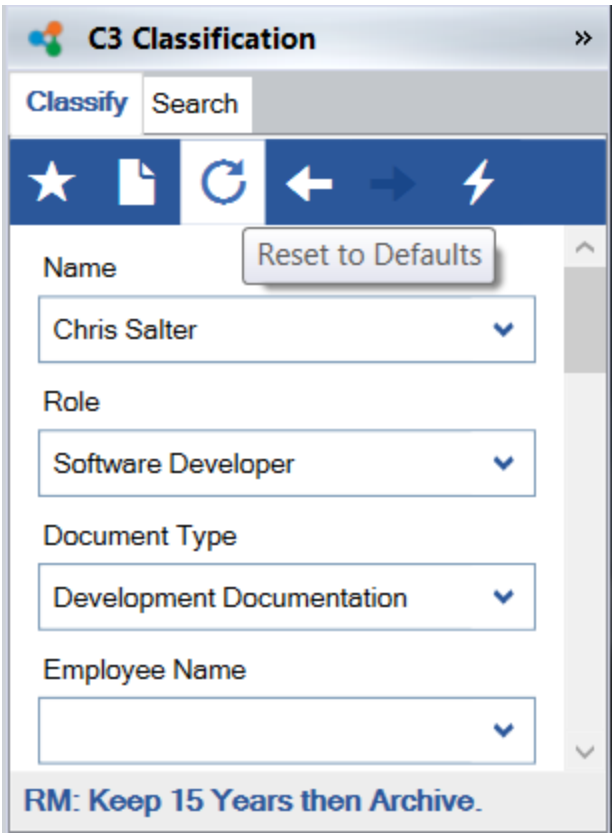


**SharePoint Default Propagation**

Defaults should propagate to systems integrated with C3, such as SharePoint but either the cache will need to be triggered or the cache update interval will need to be reached.

****Note:** Defaults will also be loaded when a blank or new document is opened.

**Global User Defaults**

Alternatively, defaults can be set for all users. Please refer to the C3 System Administration and Reference Guide.

****Note:** User defaults will always override global defaults with the exception of today's date.


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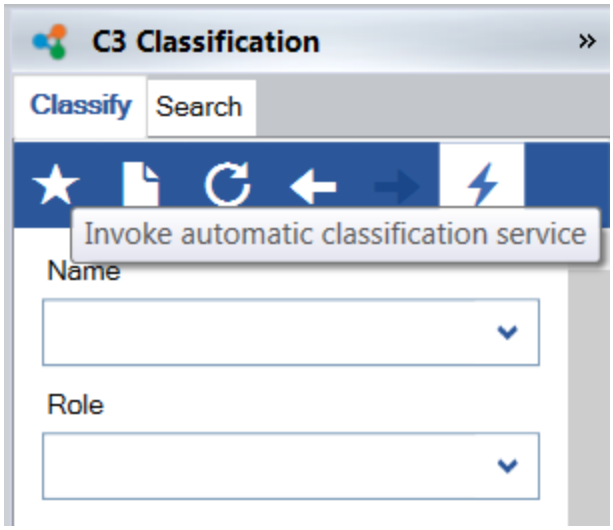
## 2.11 Autoclassification

Autoclassification is a component of the C3 Classifier, and is used to automatically select facet values that can be derived from the text of the current document. Autoclassification is invoked by clicking the ***Lightning*** icon in the C3 Classifier, or on the ribbon.




Autoclassification attempts to automatically select values for any blank facets. It will attempt to select the best set of facet values that match terms in the document. The C3 Administrator has the ability to adjust the relative priority of the facets and can also set Autoclassification to ignore some facets. Facet priority makes a difference to how Autoclassification will reconcile matches of mutually incompatible facets values (i.e., two or more values that cannot all be selected at the same time due to the algebraic constraints in the C3 model).

The selections made by Autoclassification behave similarly to manual selections in that the ***Undo*** button will clear the selections made by Autoclassification.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## 2.12 Knowledge Map

Tagging a document with C3 facet values is the equivalent of creating a semantic description for that object. When users are selecting metadata with C3, they are creating a description that expresses a specific subject in a given context.

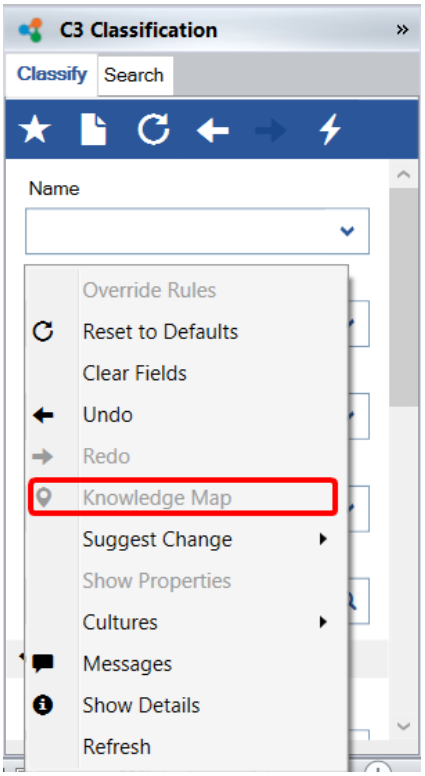
When an information object is saved with its semantic description, it then becomes possible to find the information object based on its semantic description. By applying the same logic to people, C3 makes it possible to create a **knowledge map** of an organization.

Through the C3 Classifier, it is possible to create semantic descriptions (subject and context) with a set of facet values and then link that description to a specific individual within the organization. This means that this individual knows something about a specific subject in a given context expressed by the set of metadata linked to them.

Once people have been tagged with semantic descriptions, they become searchable. C3 can then perform searches that not only provide results on the unstructured information (documents, email, etc.) that is linked to a specific metadata set, but also provide a list of people who are knowledgeable about the subject expressed by the set of metadata.

To create a knowledge map link, describe the subject and context of the concept you want to express by selecting facet values in the C3 Classifier right click and select ***Knowledge Map*** (this button will be available once the appropriate connection string has been added to the user or cogniva.ini -- see the "CogAdm Tool" section of the "C3 Server Installation and Configuration Manual"):

Facet values selected prior to launching Knowledge Map will be associated with the record you create.




The ***Knowledge Map Link*** window will open.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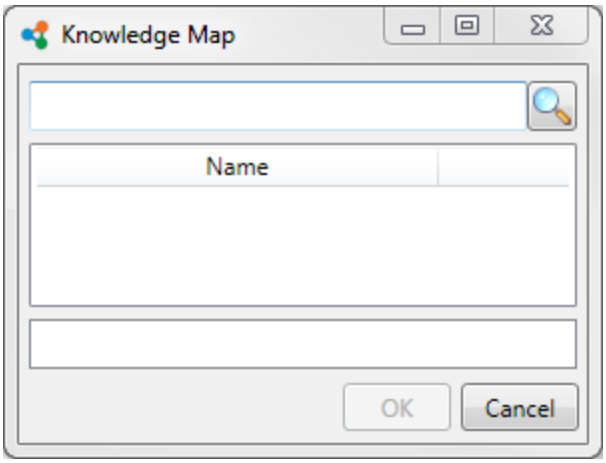
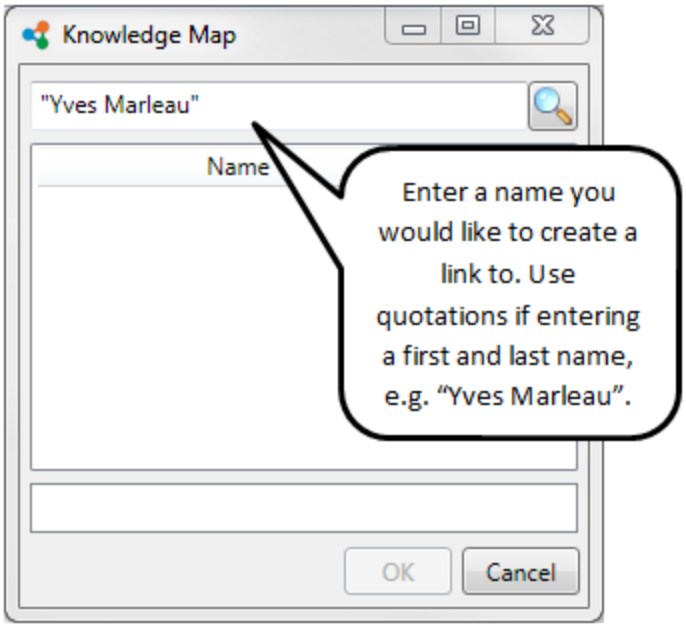



**Knowledge Map Link window**

In the *Search* field, enter the name of the person you want to link the description to and click ***Go***. Use quotations if you are searching a first and last name, e.g. "Yves Marleau". A list of results corresponding to your search will be displayed in the ***Results*** area. Select the right name by double-clicking it.




The selected name will appear in the ***Selected Values*** area.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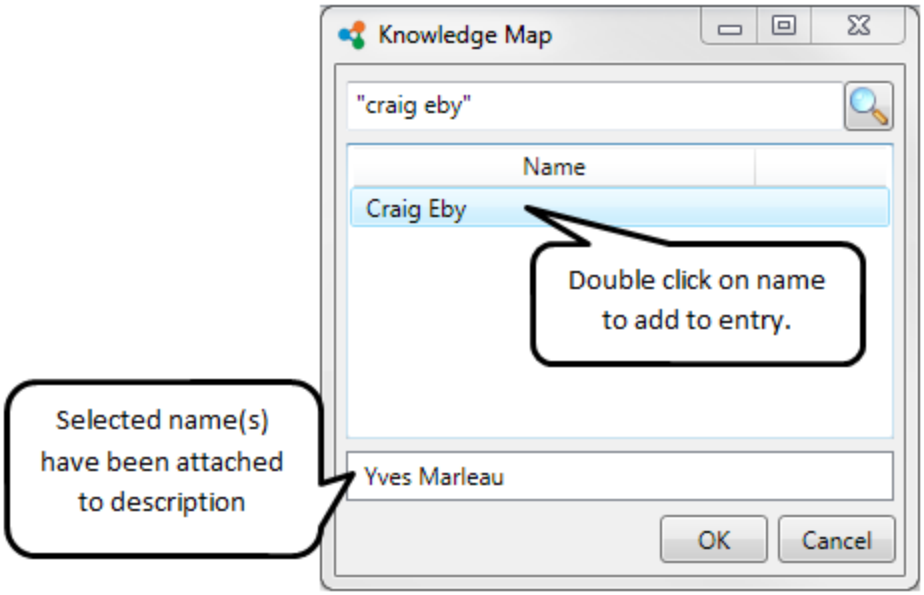
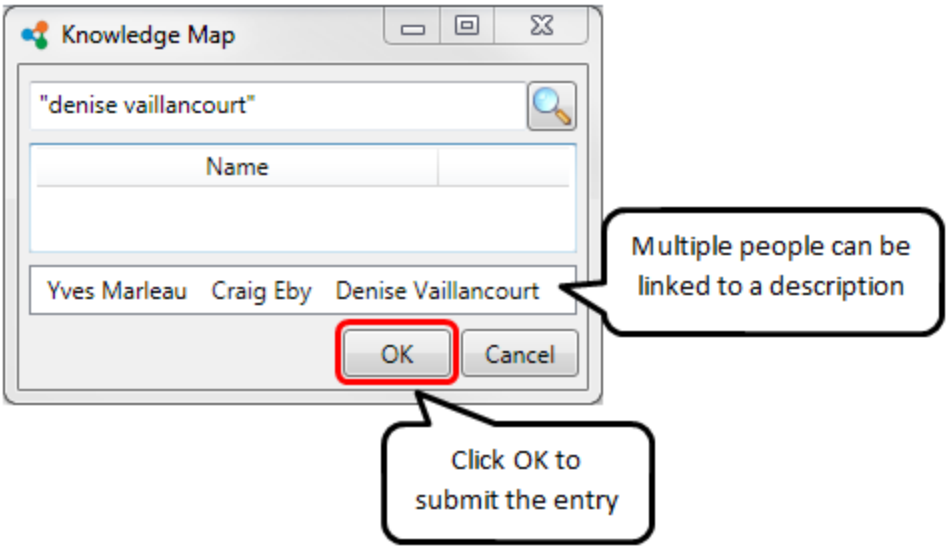



By repeating the search process, it is possible to link more people to the same description. Click ***Ok*** to establish the link.





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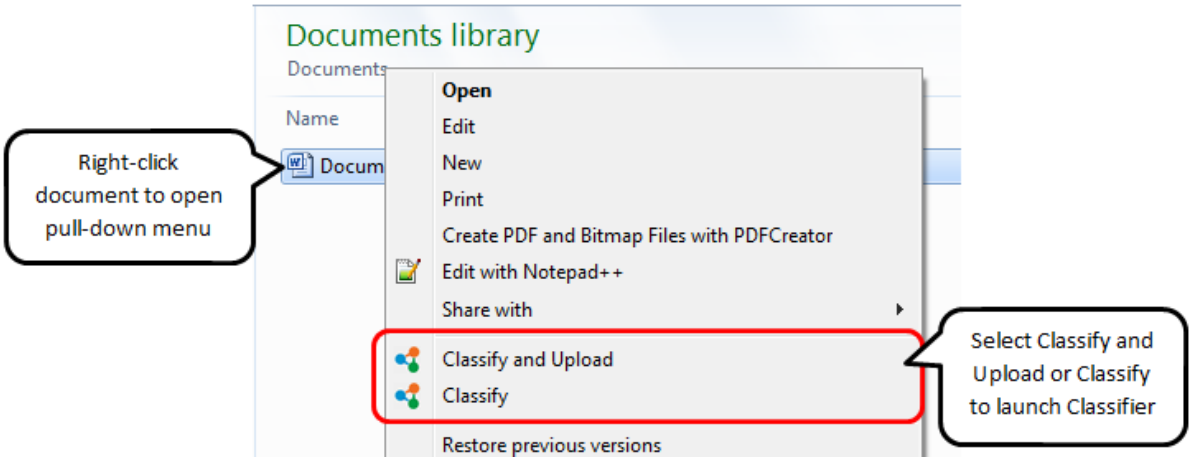
## 2.13 Desktop Classifier

The Desktop Classifier is a tool that allows the user to migrate and tag documents. The user invokes the tool by right-clicking a local file and selecting ***Classify and Upload*** or ***Classify*** from the context menu. It is also possible to highlight several files from the same folder followed by right-clicking one of the highlighted files. Doing so marks all of the highlighted files for migration and tagging.




Documents can be uploaded from a local folder or a locally accessible file share to a document repository such as Microsoft SharePoint or OpenText Content Server. Additionally, the local copies of the files can be moved to a different locally accessible folder. This assists in keeping the local workspace organized. For example, a local file "C:\Users\John\Drafts\memo.docx" can be uploaded to SharePoint 2010 site "https://local.business.com/sites/business/Administration//Shared%20Documents/", and moved to "C:\Users\John\Archive\" in a single action.

Documents selected for migration can be assigned C3 metadata using an interface similar to the task pane in Microsoft Office. The user is able to select appropriate C3 metadata for the selected documents. As each value is chosen, the remaining values for each facet are reduced and auto-completed where possible. If more than one file was selected, the selected C3 metadata values will be applied to each of the files.

Classify Desktop Classifier: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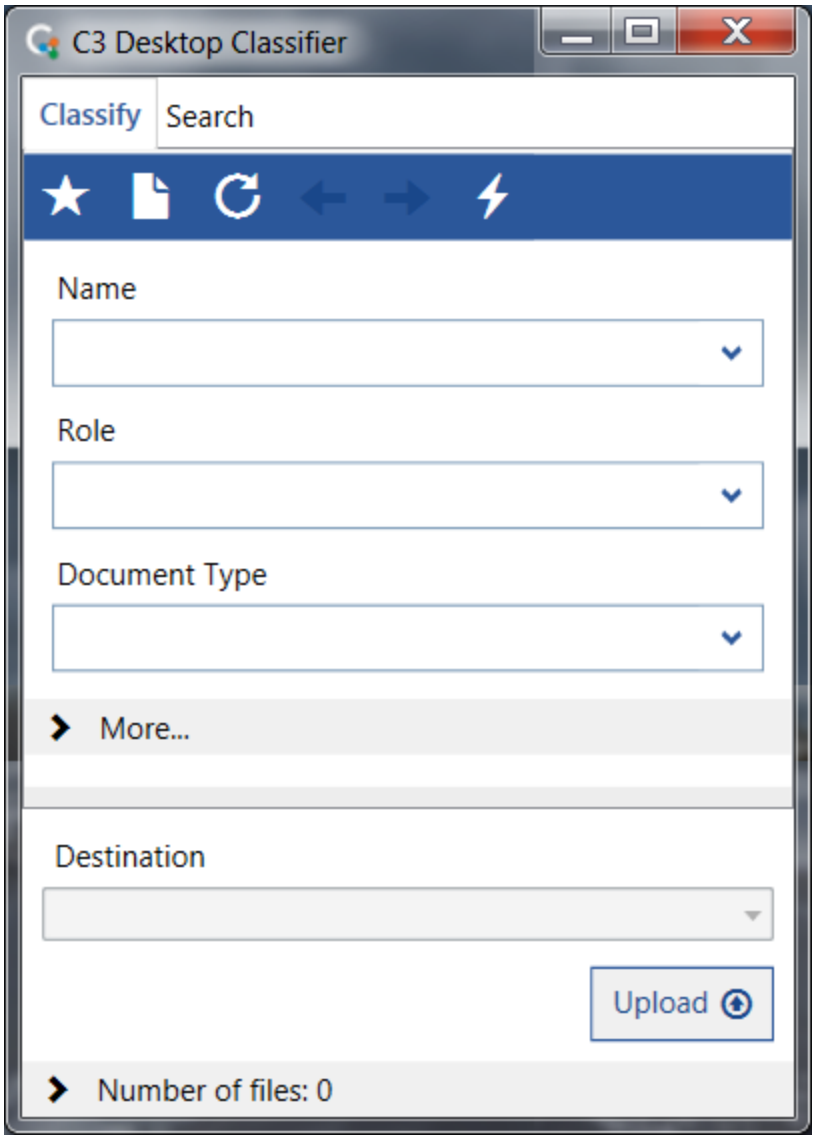



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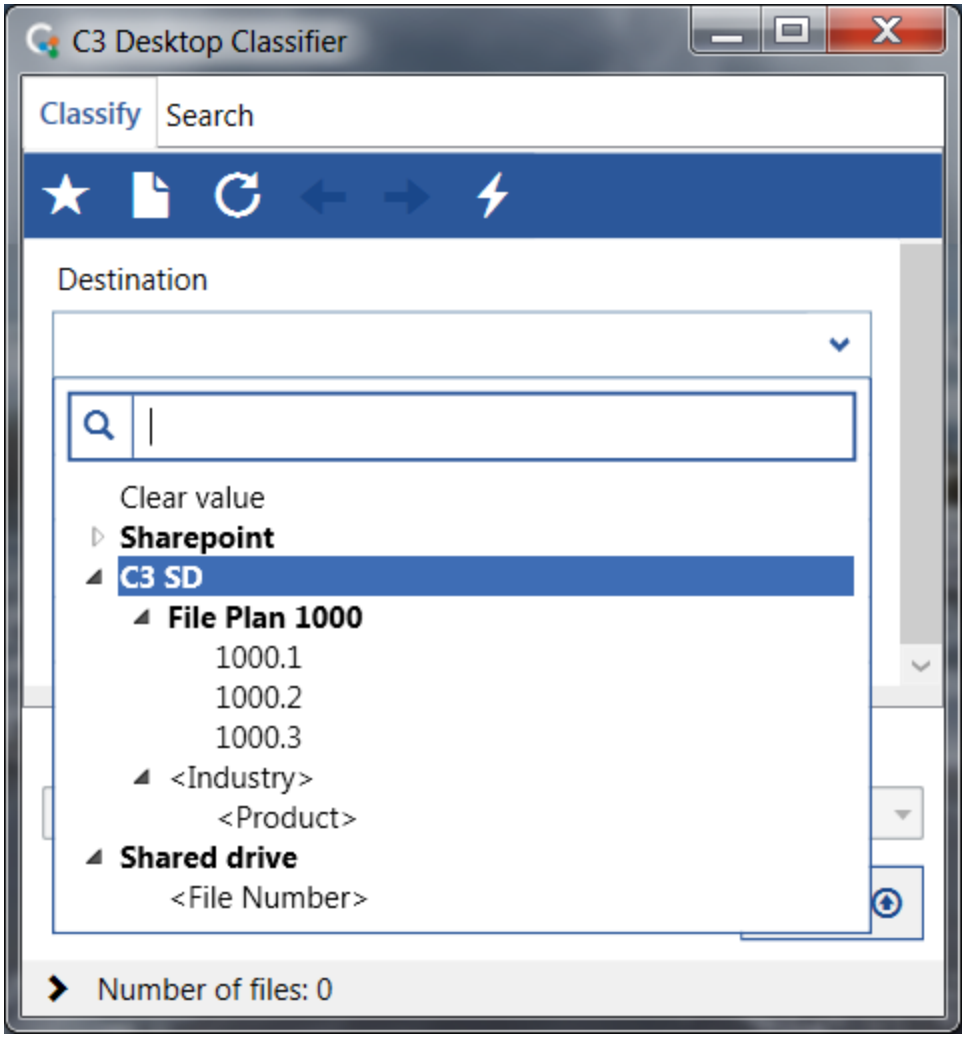
Classify and Upload Classifier:




Unique components of the Desktop Classifier Upload and Classify window include a ***Destination*** location that specifies a connection string to a repository, a local folder path, and an ***Upload*** button. If algebra is setup in the model a predefined location will be selected for the users as they fill in the facets. In the example above no algebra has been setup so the user has to select a destination. Expand the ***More Fields*** and locate the ***Destination*** facet. Select a destination from the C3 administrator's' list of predefined permissible connection strings. This will populate the destination field at the bottom of the window and activate the ***Upload*** button. When the upload button is clicked a repository navigation dialog appears. The user has the ability to select from any permissible path in the repository and make this the destination of the selected files. Clicking ***OK*** causes the files to be uploaded (and moved if a local folder is selected). Clicking ***Cancel*** aborts the document migration process.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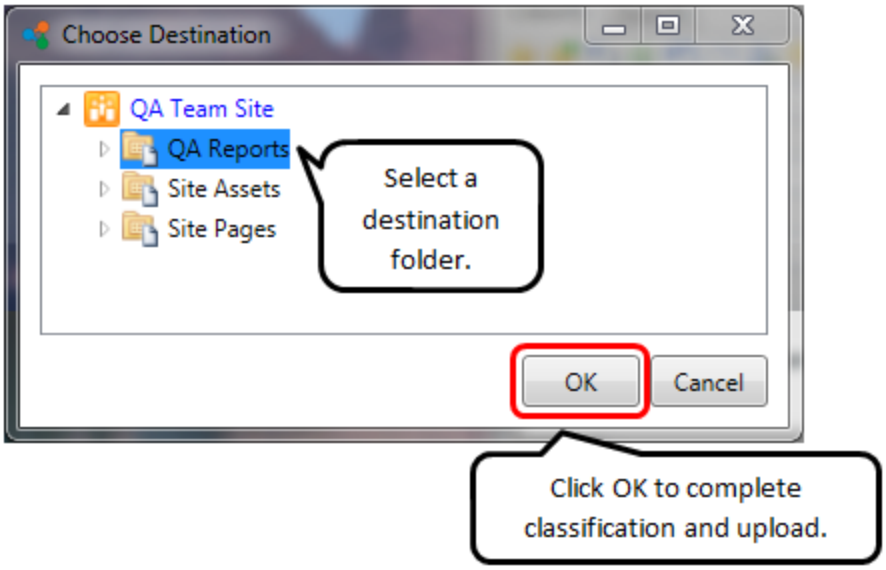
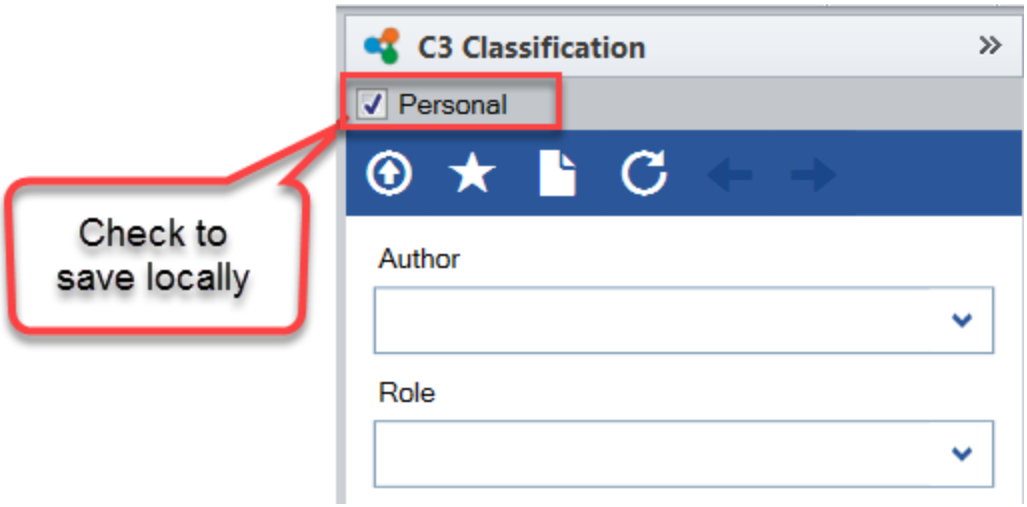



## 2.14 Using Intercept Save

The Intercept Save feature is used to save documents directly from Microsoft Office into Microsoft SharePoint. This can be done either for business or personal documents.

When this feature is enabled, clicking save or save as option in Microsoft Office will trigger this behaviour. When Intercept Save is activated this check box lets you decide where documents will be save.




By selecting or de-selecting the ***Personal*** check box (as shown above), the ***Intercept Save*** dialogue box will have different connection strings displayed (as shown below).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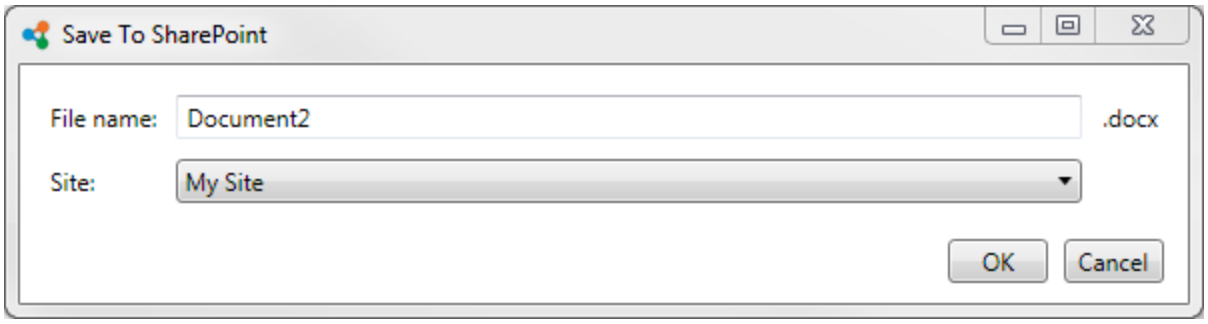
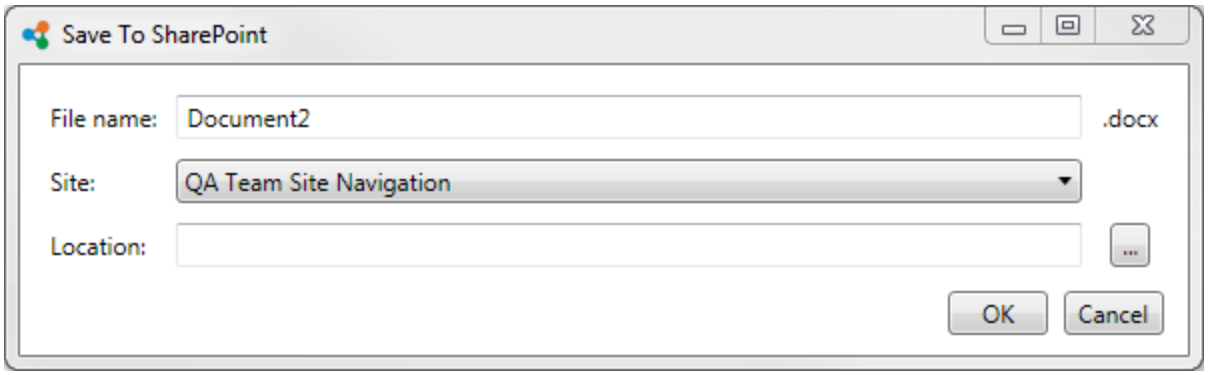



**Example of 'Personal' URL.**




**Example of a 'Business' URL.**

***Note:** Business URL documents can only be saved if all required fields are filled in.

## 2.15 Using C3 Desktop Search

C3 Desktop Search provides the ability to search enterprise content repositories from within the Microsoft Office Suite of products (Word, Excel, PowerPoint). Search connectors are available for SharePoint, eDocs, Content Server and Windows Desktop. Users can use the C3 Desktop Search in the language of their choice and receive the same search results regardless of the language they used to create their queries.

### The C3 Desktop Search Interface

The C3 Desktop Search interface adds a tab to the task pane in the supported Microsoft Office products. In the C3 Desktop Search interface, there are three main areas:

1. The Desktop Search toolbar includes the document type selector filter (used to view documents of a specific type).

2. Currently selected values display. Selected values can be removed by clicking the red '**X**' to the left of the facet.

3. Search Results Area.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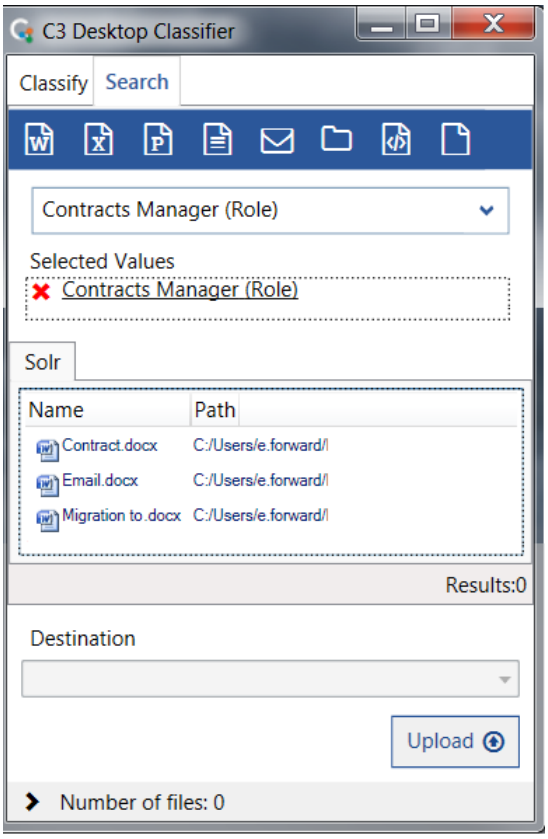



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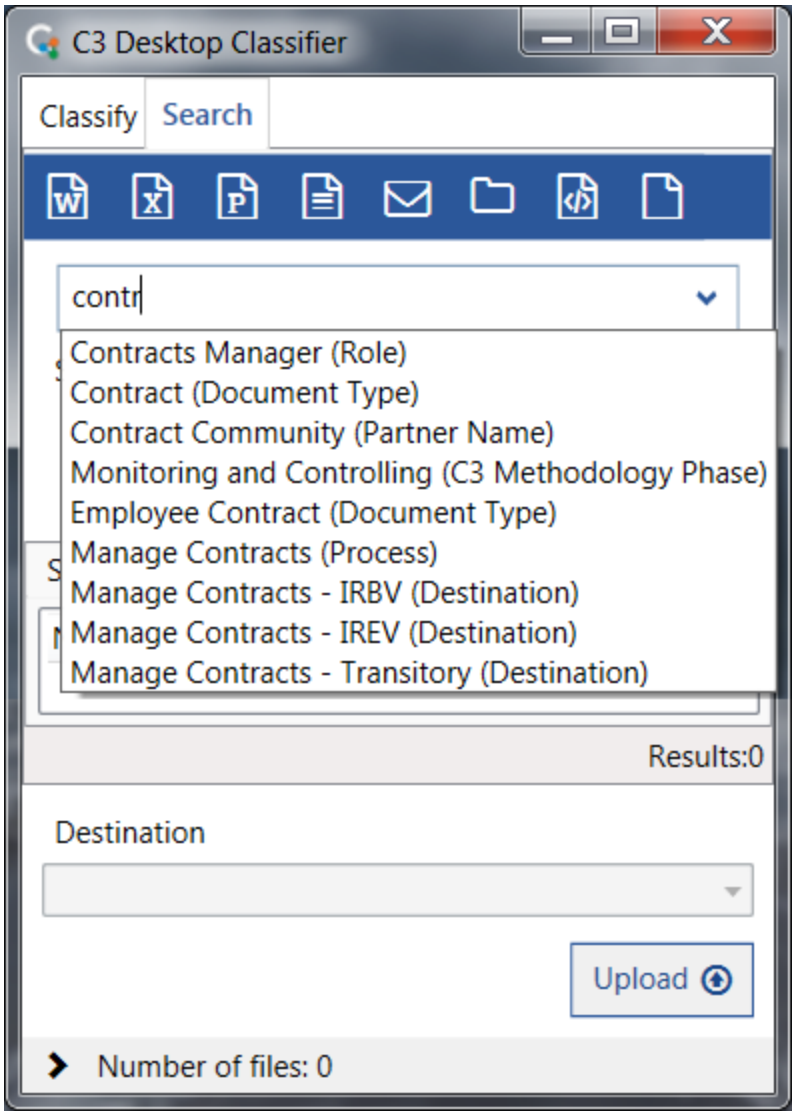
Facet values can be selected in two ways:

1. By typing into the *Facet Selector* field and selecting from the auto-complete text drop-down (below).





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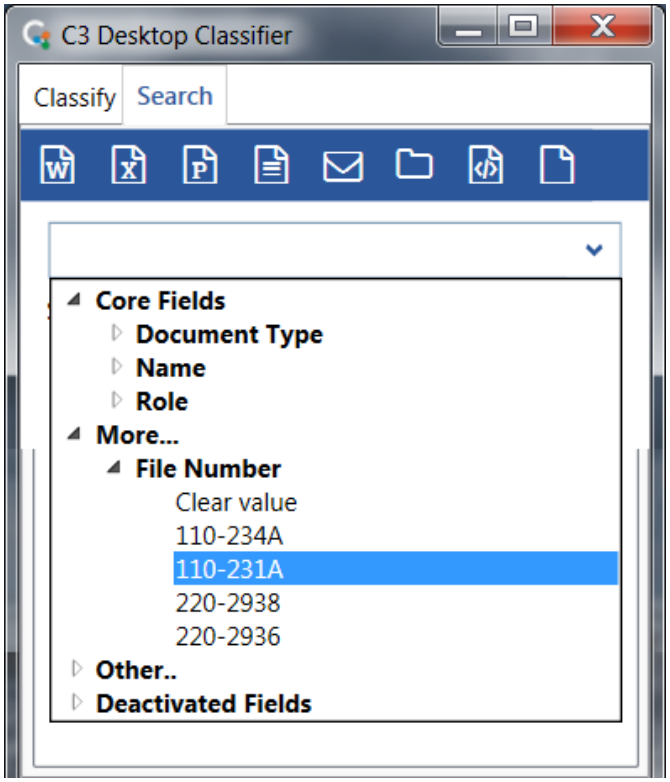
2. By clicking the drop-down arrow on the ***Facet Selector*** and navigating the TreeView (below).





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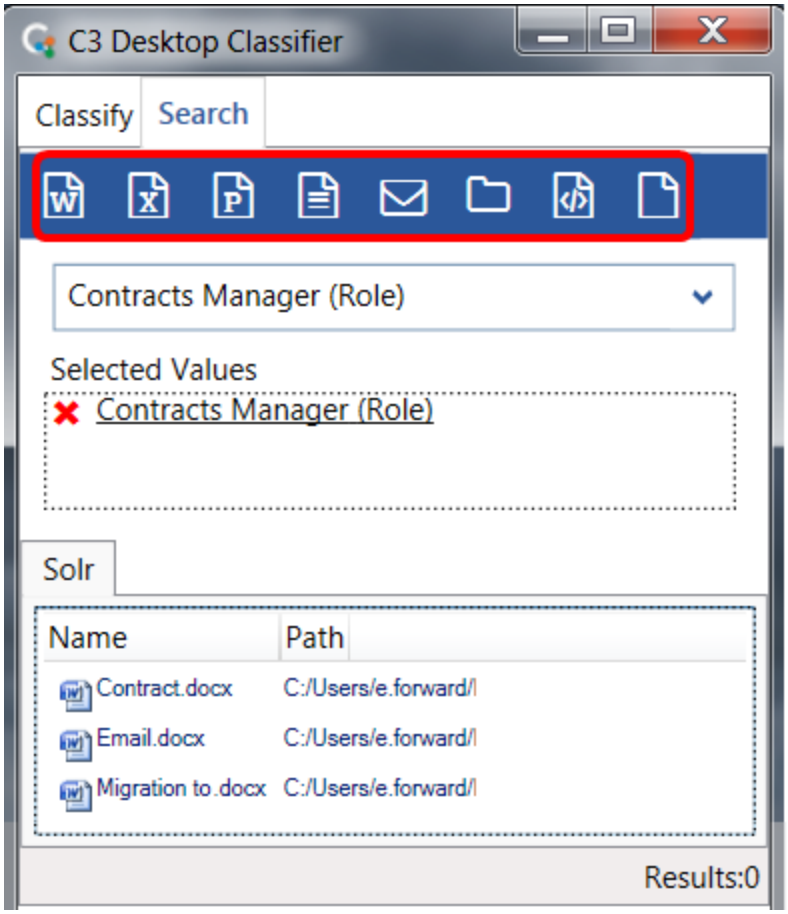
3. Users can search for specific file-types by toggling one or more of the filters at the top of the search interface (below).





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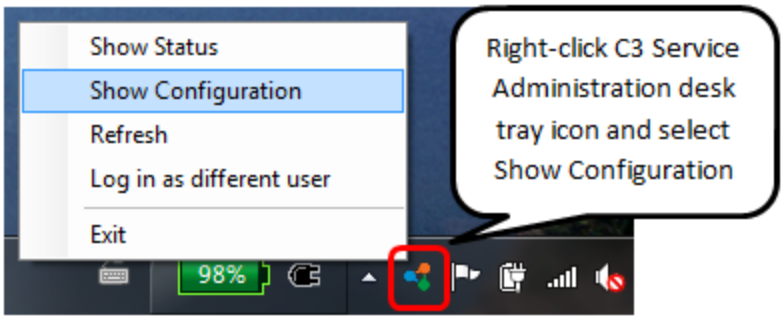
# C3 Configuration

The C3 Configuration Tool enables the user to set default settings. C3 Configuration can be accessed by clicking on the ***C3 Service Administration*** desk tray icon and selecting ***Show Configuration.***




## 3.1 The C3 Configuration Interface

By default there is only one component in the C3 Configuration tool: **General Configuration**. However, additional tabs may appear depending on what option components (e.g., SharePoint integration) are installed. Components of the C3 Configuration Interface can be accessed by clicking the appropriate tab at the top of the interface. The ***General*** tab allows the user to adjust settings that are applied to the C3 Classification interface.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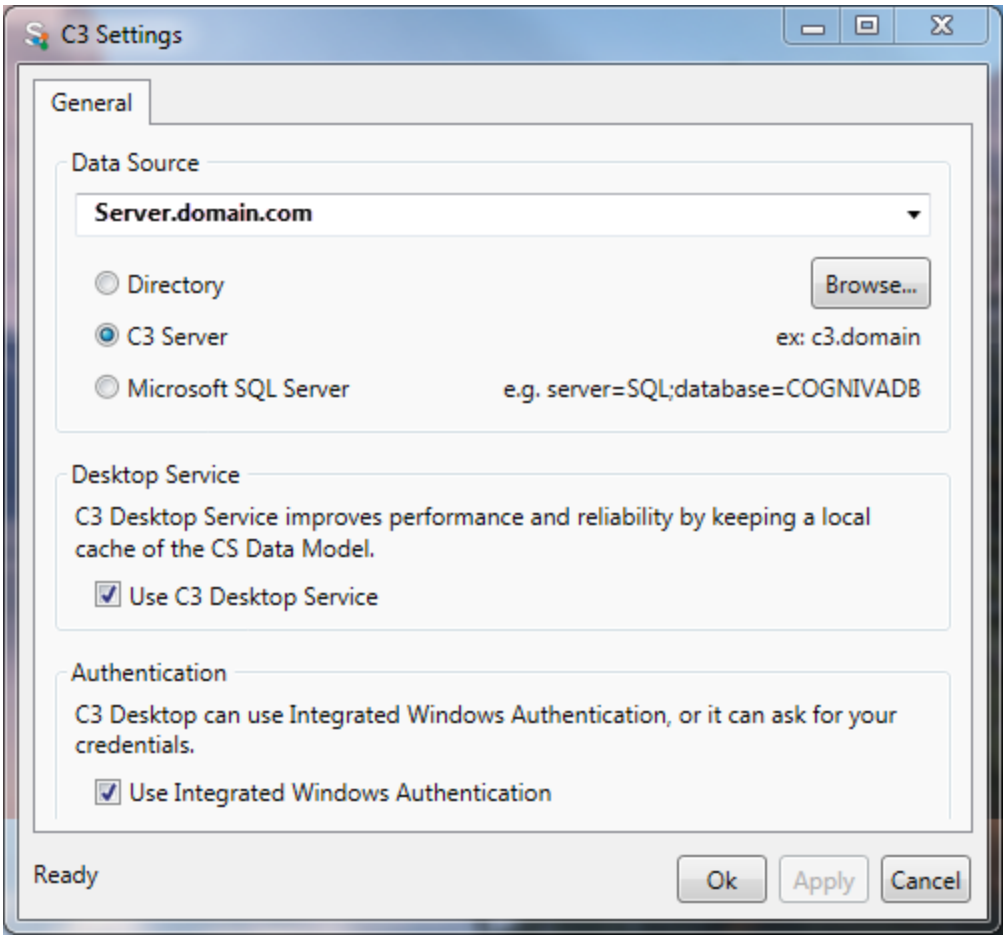


**Data Source:** Allows users to establish/change the appropriate connection strings so that C3 can locate the services.

**Desktop Service**: Check "**Use C3 Desktop Service**" if you would like to speed up the Classification Tool by using a built-in cache.

**Authentication:** Check "**Use Integrated Windows Authentication**" if you would like to log in automatically and not be prompted for your credentials.


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