Arco

DocRoom 6
Application administrator manual
05. Packages

A new era in document management.

DocRoom 6

Application administrator manual

05. Packages

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1 Introduction

1.1 Definition

A package is a kind of object attachment in DocRoom. There are 3 kinds of packages:
- Pool packages
- Category packages
- Procedure packages

Pool package
A pool package can be used in several categories. Use a pool package if you plan to use the same package in more than one category.
Note: a pool package is never linked to a procedure.

Category package
Documents, folders, DocRoom workflows and dossiers can have one or more types of packages:
- DocRoom package
- DocRoom query package
- Workflow package
- Workflow query package
- Sharepoint package

Procedure package
Routing workflows can have one or more types of packages:
- DocRoom package
- DocRoom query package
- Workflow package
- Workflow query package
- Sharepoint package

Each DocRoom object can have 0, 1 or more packages. There is no limit on the amount of packages.

1.1.1 DocRoom package

This package can contain a set of these DocRoom objects:
- Documents
- Folders
- Dossiers
- DocRoom workflows

It is possible to set a limit on the categories (tab content in Package detail screen).

1.1.2 DocRoom query package

This is a read-only package. The package is filled with the result of a query. You have to create a query in the web interface, or you can use XML syntax to define your query.
The content of this package is regenerated each time you view/edit a DocRoom object.

1.1.3 Workflow package

This package can contain a set of routing workflows.
It is possible to set a limit on the procedures (tab content in Package detail screen).

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1.1.4 Workflow query package

This is a read-only package. This package is filled with the result of a query. You have to create a query in the web interface, or you can use XML syntax to define your query.
The content of this package is regenerated each time you view/edit a DocRoom object.

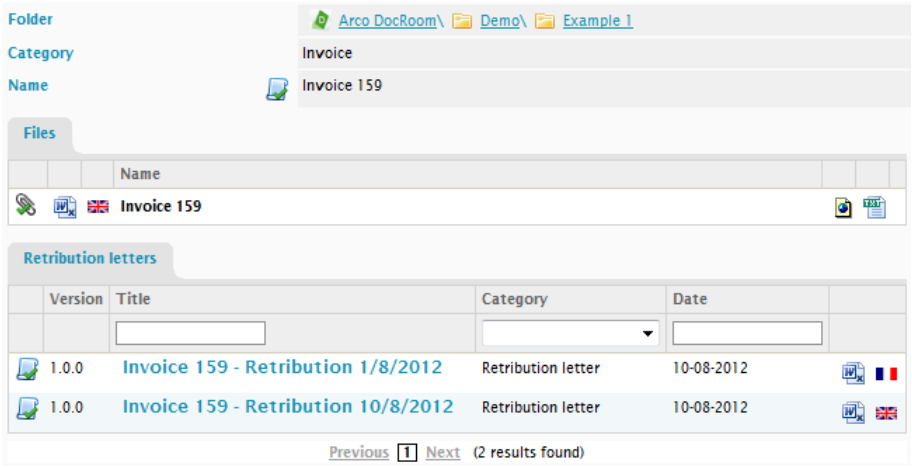
1.1.5 Sharepoint package

A Sharepoint package contains a set of Sharepoint documents.

1.2 Application

1.2.1 DocRoom package

Use a DocRoom package if you want to link one or more DocRoom objects to a DocRoom object.
E.g.: An invoice can have a DocRoom package with the name “Retribution letters”. The user can add new retribution letters to this package.



1.2.2 DocRoom query package

Use a DocRoom query package if you want to display the DocRoom objects from a query.
E.g.: An invoice can have a DocRoom query package with the name “All retribution letters”, this is a read only package and displays all retribution letters of the invoice involved.

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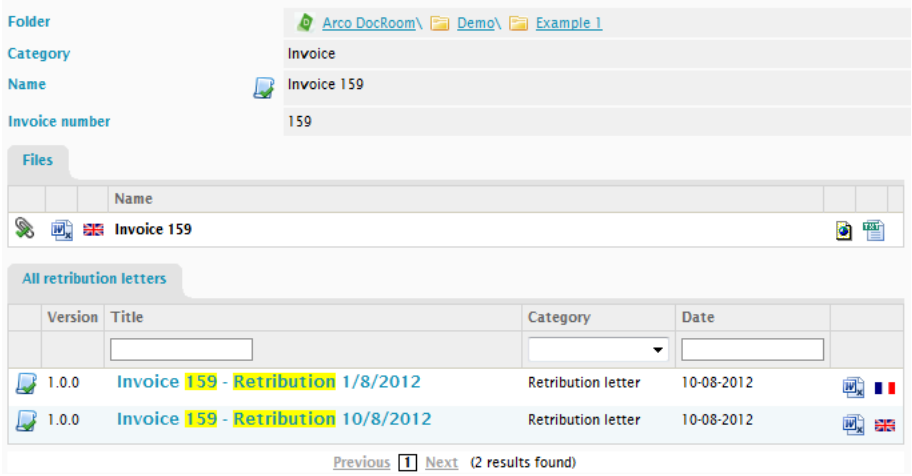
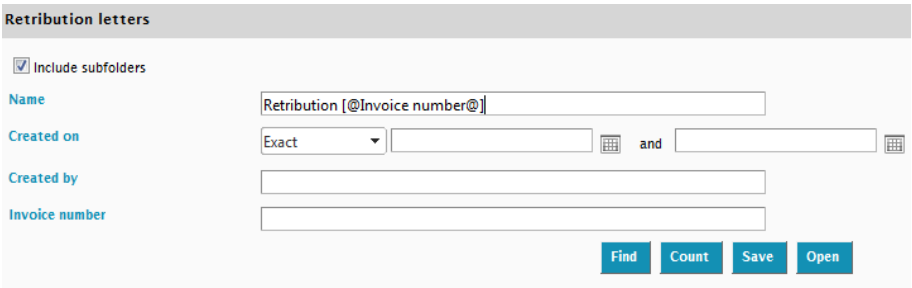
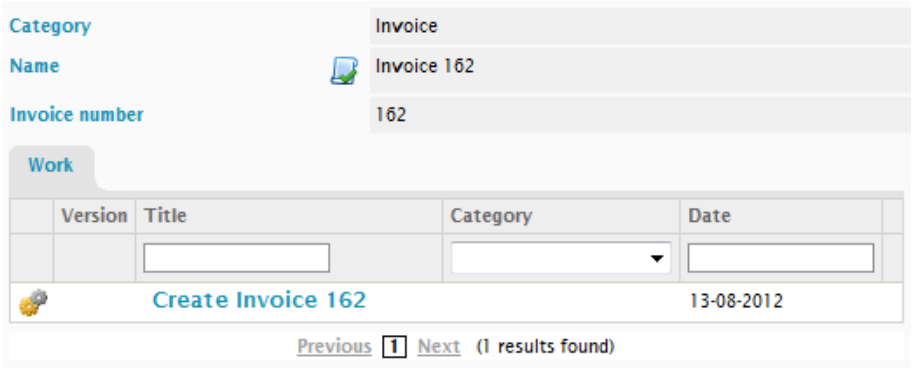


The query looks like this:



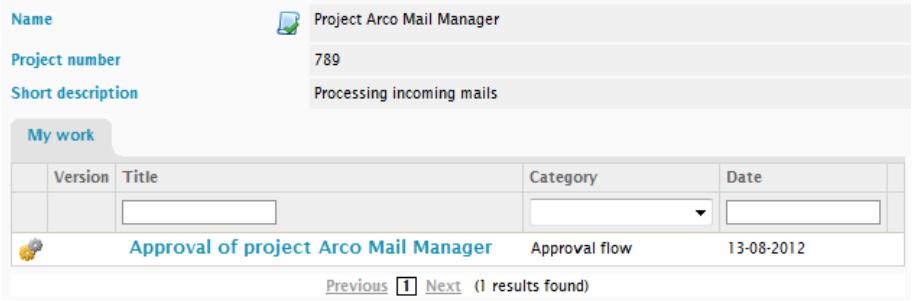
1.2.3 Workflow package

Use a workflow package if you want to link one or more workflow objects to a DocRoom object.
E.g.: When creating a new invoice, some workflows have to be started. These workflows can be attached to the document.

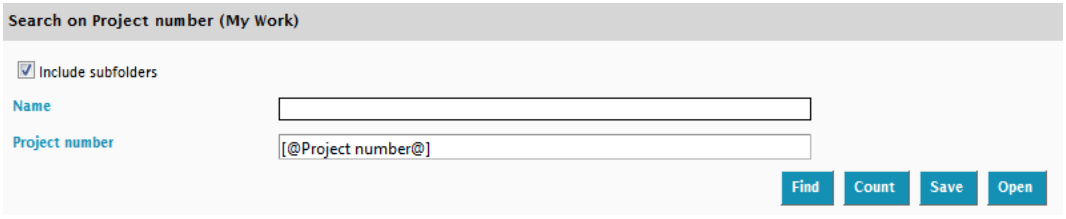


1.2.4 Workflow query package

Use a workflow query package if you want to display the workflows from a query.
E.g.: A project can have a workflow query package with the name “My work”, this is a read only package and display all workflows of the project involved.



The query looks like this:

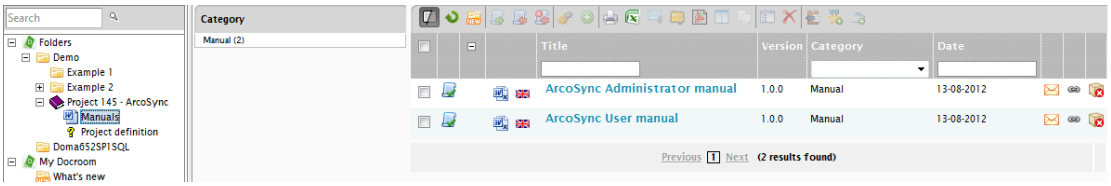


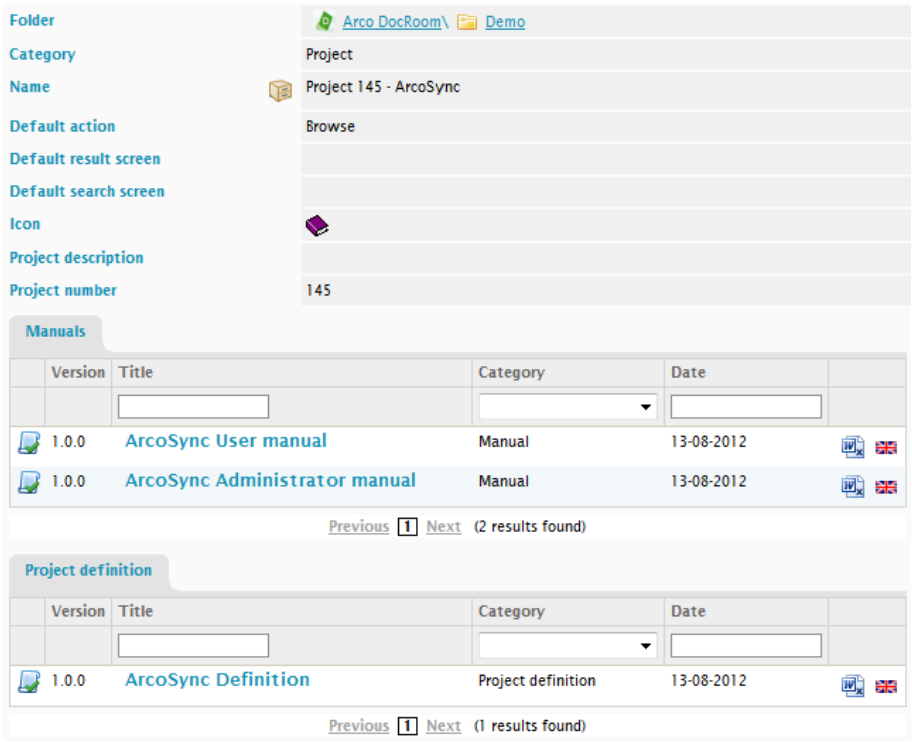
1.2.5 Sharepoint package

Use a Sharepoint package if you want to link documents stored in Sharepoint.

1.2.6 Packages and dossiers

Packages are typically used in dossiers. A dossier can have one or more packages. These packages can be shown in the tree.
E.g.: A project can have a project definition and several manuals.





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2 Configuration

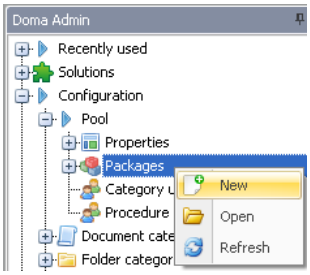
The configuration is done in the Doma amdin module.

2.1 Add pool package

Start the Doma admin module.

In the left side pane, select tree node “Configuration – Pool – Packages”.

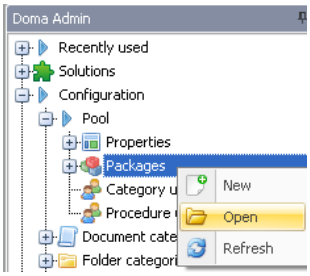
Right-click on node “Packages”. A menu appears:



Click “New”.

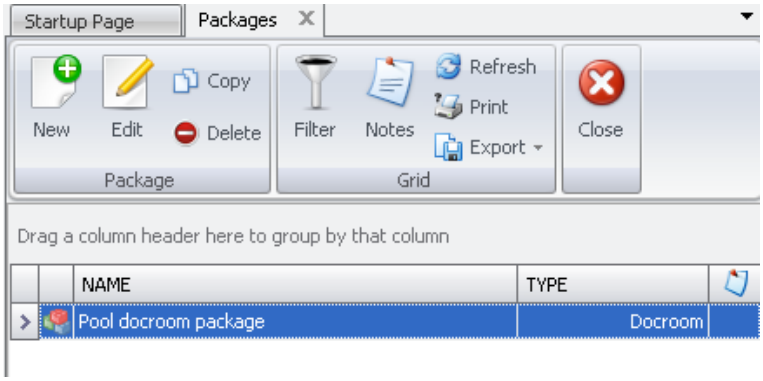
Or

Right-click on node “Packages”. A menu appears:



Click “Open”.

A new screen is opened in the right pane of the Doma admin module.



Click “New” button in the ribbon bar.

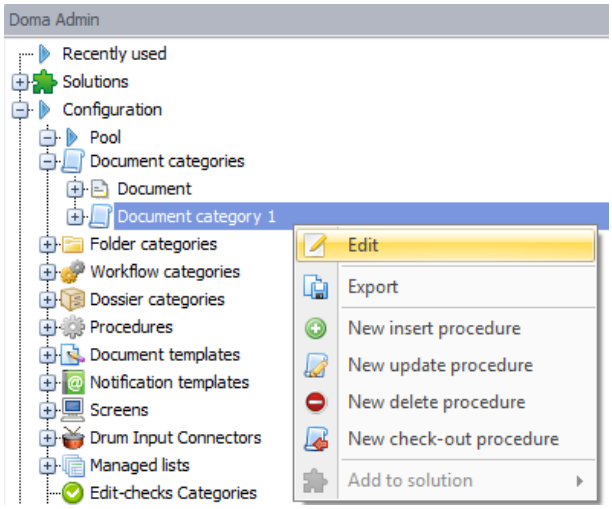
Continue with chapter 2.8 “New package”.

2.2 Add category package

Start the Doma admin module.

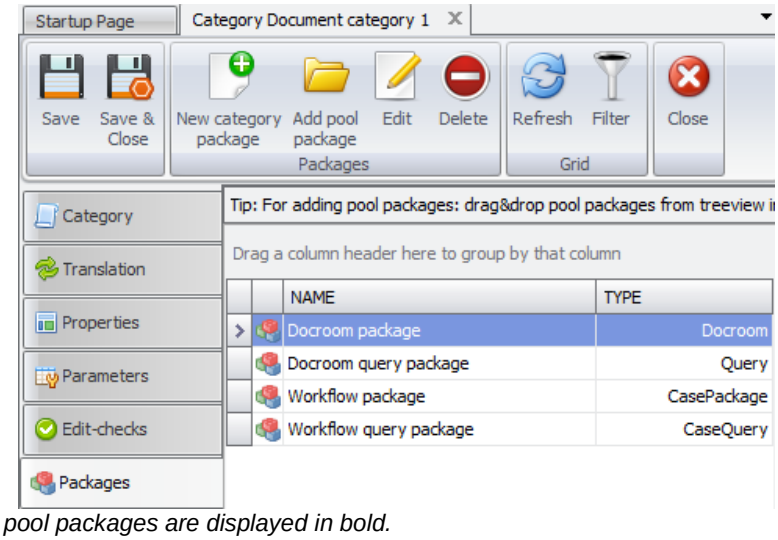
In the left side pane, expand one of these tree nodes:
- "Configuration – Document categories"
- "Configuration – Folder categories"
- "Configuration – Workflow categories"
- "Configuration – Dossier categories"

Right-click on one of the sub nodes. A menu appears:



Click "Edit".

A new screen is opened in the right pane of the Doma admin module. This screen contains category details.
Click on tab "Packages".



***Note**: pool packages are displayed in bold.*

Click "New category package" in ribbon bar.

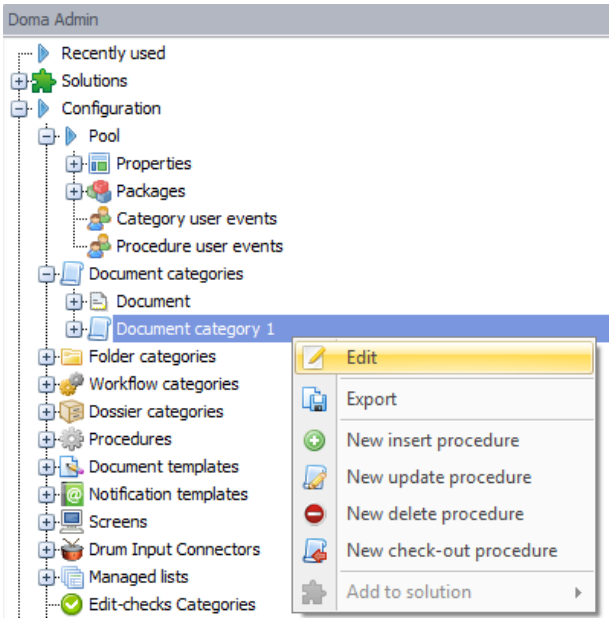
Continue with chapter 2.8 "New package".

2.3 Link pool package to a category

Start the Doma admin module.

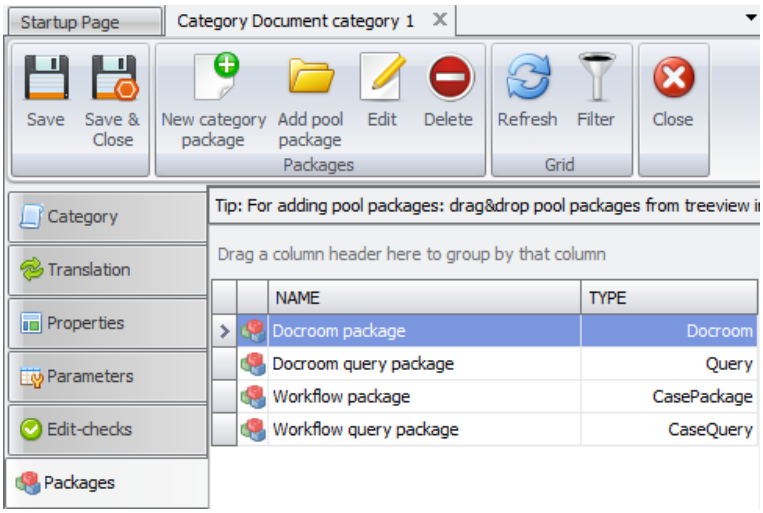
In the left side pane, expand one of these tree nodes:
- "Configuration – Document categories"
- "Configuration – Folder categories"
- "Configuration – Workflow categories"
- "Configuration – Dossier categories"

Right-click on one of the sub nodes. A menu appears:



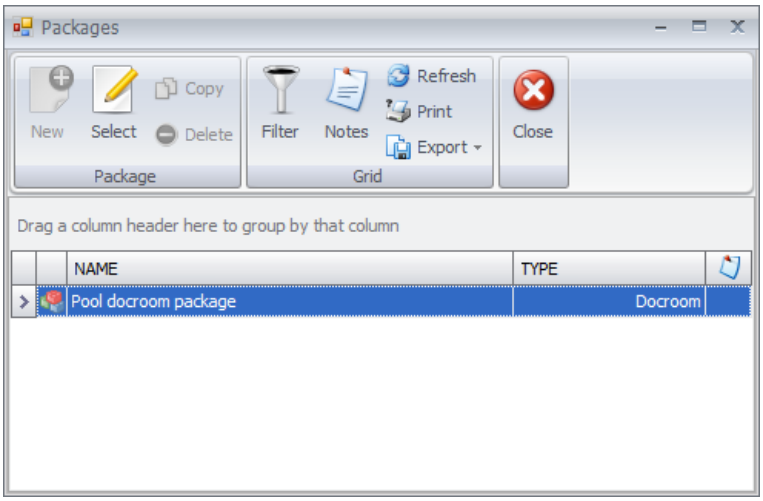
Click "Edit".

A new screen is opened in the right pane of the Doma admin module. This screen contains category details.
Click on tab "Packages".



***Note**: pool packages are displayed in bold.*

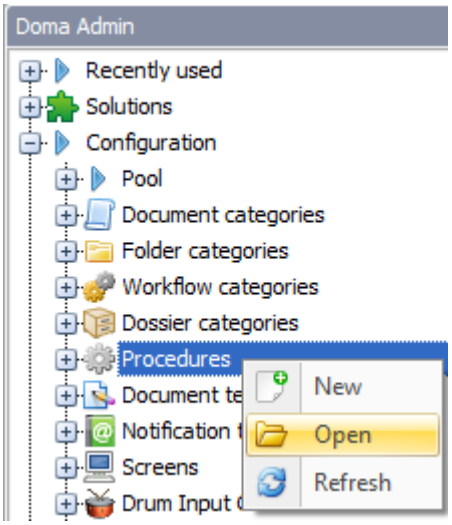
Click "Add pool package" in ribbon bar.
A popup that contains a list of all pool packages is opened.



Select one or more pool packages.
Click “Select” in ribbon bar.
The popup is closed and the selection is added into the packages grid in the category detail screen.

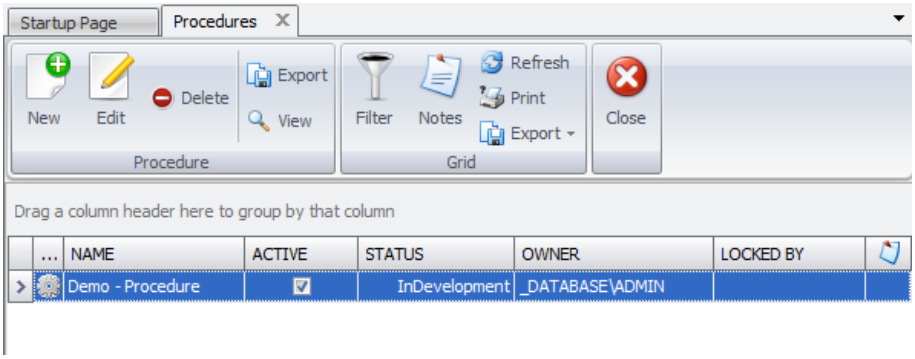
2.4 Add procedure package

Start the Doma admin module.
In the left side pane, select tree node “Configuration – Procedures”.
Right-click on node “procedures”. A menu pops up.



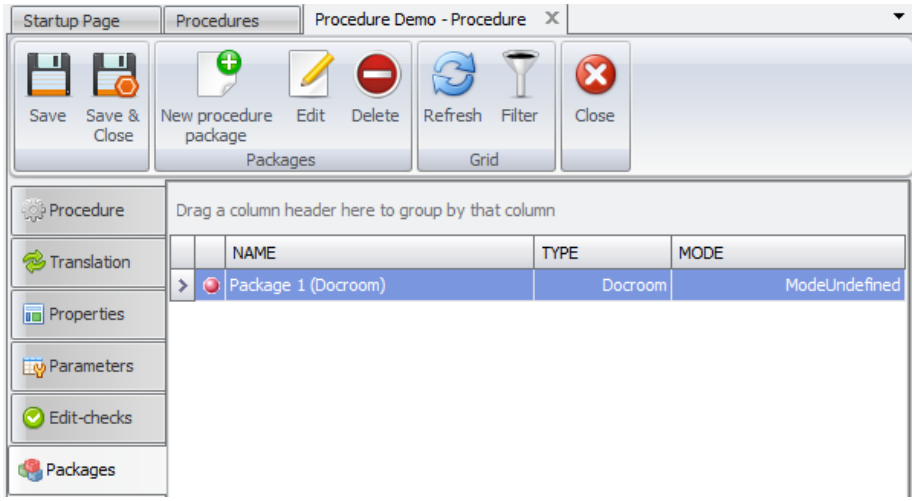
Click “Open”.

A new screen is opened in the right pane of the Doma admin module. This screen contains a list with procedures.



Select one of the procedures.
Click “Edit” in ribbon bar.

A new screen is opened in the right pane of the Doma admin module. This screen contains procedure details.
Click on tab “Packages”.



***Note**: - pool packages (linked to category) are displayed in bold.*
- category packages are displayed in blue.

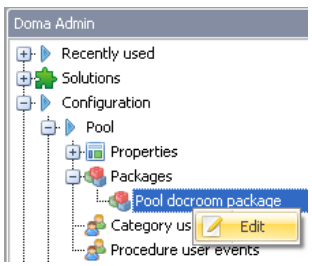
Click “New procedure package” in ribbon bar.

Continue with chapter 2.8 “New package”.

2.5 Edit pool package

Start the Doma admin module.

In the left side pane, expand node “Configuration – Pool – Packages”:
Right-click on one of the sub nodes. A menu appears.



Click “Edit”.

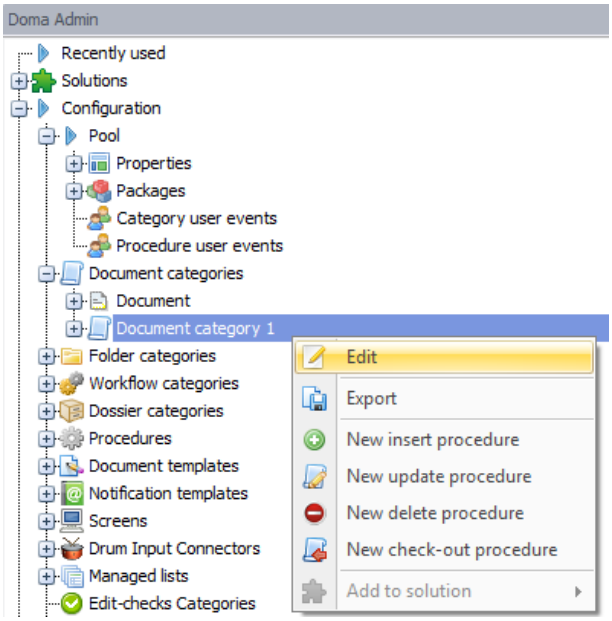
Continue with chapter 2.9 “Edit package”.

2.6 Edit category package

Start the Doma admin module.

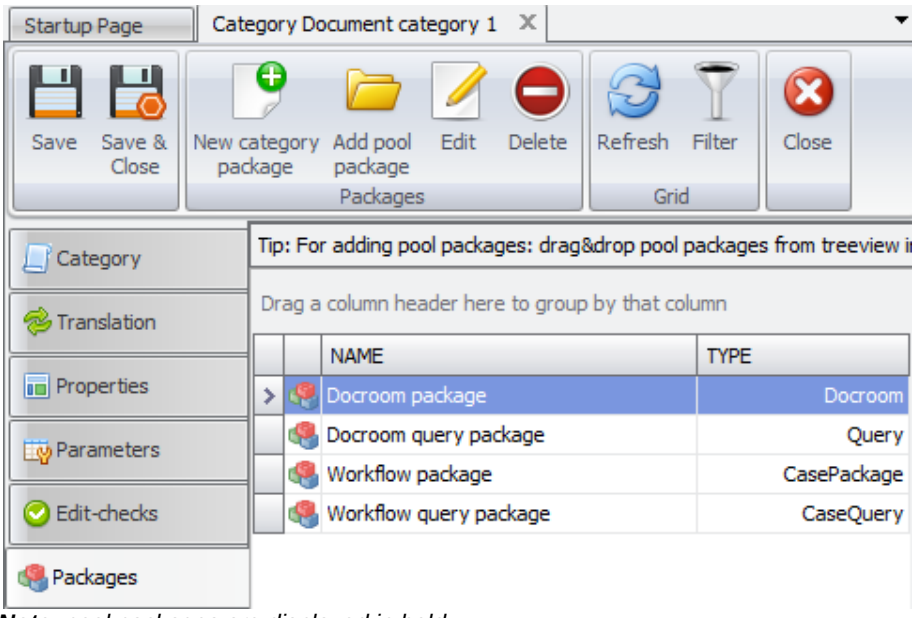
In the left side pane, expand one of these tree nodes:
- “Configuration – Document categories”
- “Configuration – Folder categories”
- “Configuration – Workflow categories”
- “Configuration – Dossier categories”
-

Right-click on one of the sub nodes. A menu appears.



Click “Edit”.

A new screen is opened in the right pane of the DOma admin module. This screen contains category details.
Click on tab “Packages”.



***Note**: pool packages are displayed in bold.*

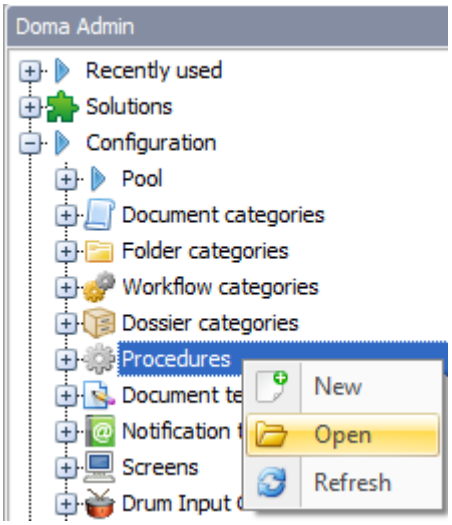
Click “Edit” in ribbon bar.

Continue with chapter 2.9 “Edit package”.

2.7 Edit procedure package

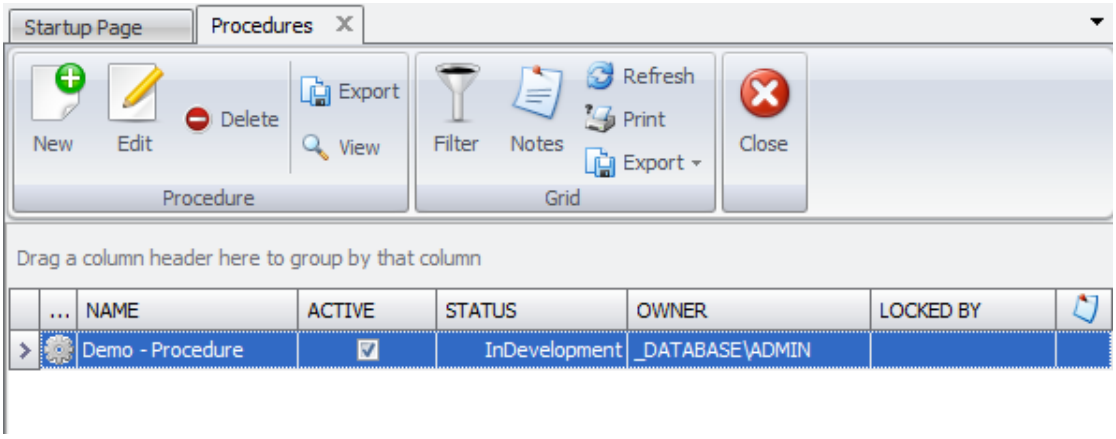
Start the Doma admin module.

In the left side pane, select tree node “Configuration – Procedures”.
Right-click on node “procedures”.



Click “Open”.

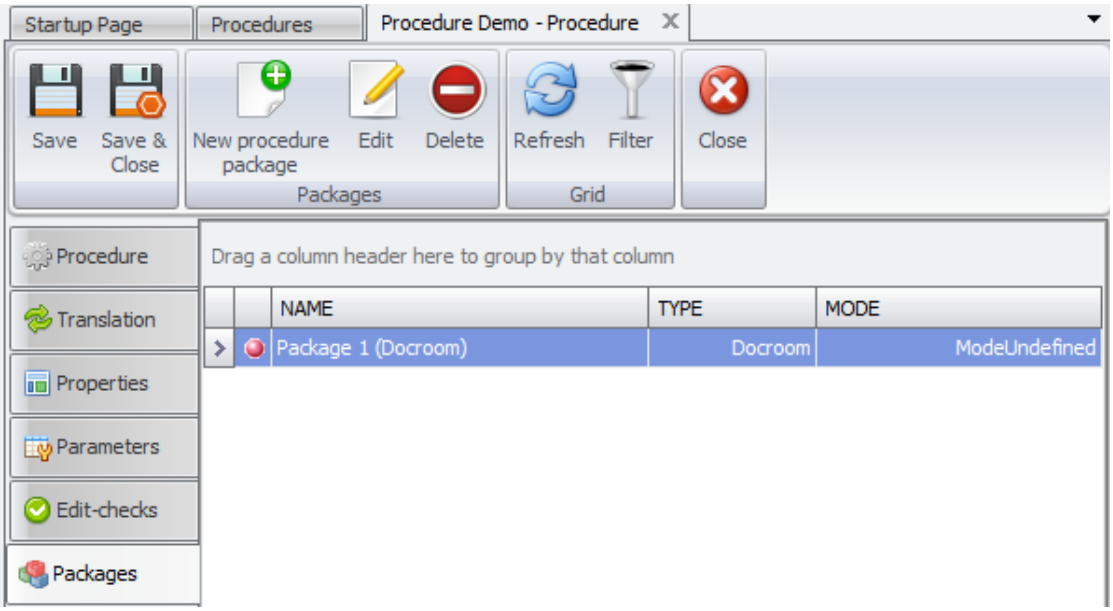
A new screen is opened in the right pane of the Doma admin module. This screen contains a list with procedures.



Select one of the procedures.
Click “Edit” in ribbon bar.

A new screen is opened in the right pane of the Doma admin module. This screen contains procedure details.

Click on tab “Packages”.



***Note**: - pool packages (linked to category) are displayed in bold.*
- category packages are displayed in blue.

Click “Edit” in ribbon bar.

Continue with chapter 2.9 “Edit package”.

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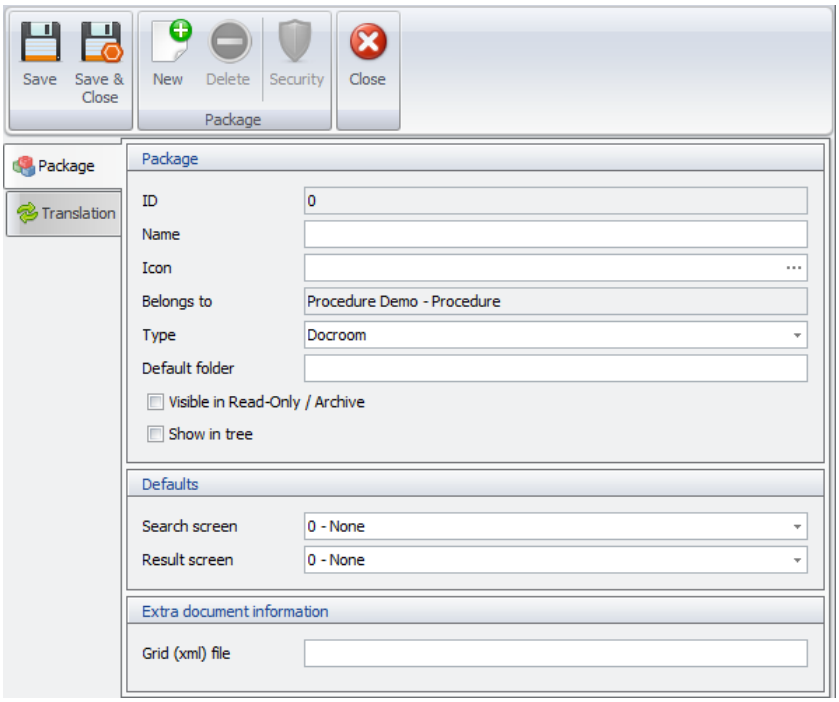
2.8 New package

When entering a new package, only a limited set of properties are shown to be filled in.



Ribbon bar	
Save	Save package.
Save & Close	Save package and close this screen.
New	Clear input form.
Delete	Disabled.
Security	Disabled.
Close	Close package. A warning is given when you have data which is not saved yet.

Follow these steps to create a package:

Enter name.
Select icon (optional).
Select type. You can choose between 5 types of packages:

DocRoom (DocRoom package)	This package can contain a set of these DocRoom objects: - Documents - Folders - Dossiers - DocRoom workflows
CasePackage (Workflow package)	This is a read-only package. The package is filled with the result of a query.
Query (DocRoom query package)	This package can contain a set of routing workflows.
CaseQuery (Workflow query package)	This is a read-only package. This package is filled with the result of a query.
Sharepoint	A Sharepoint package contains a set of Sharepoint documents.

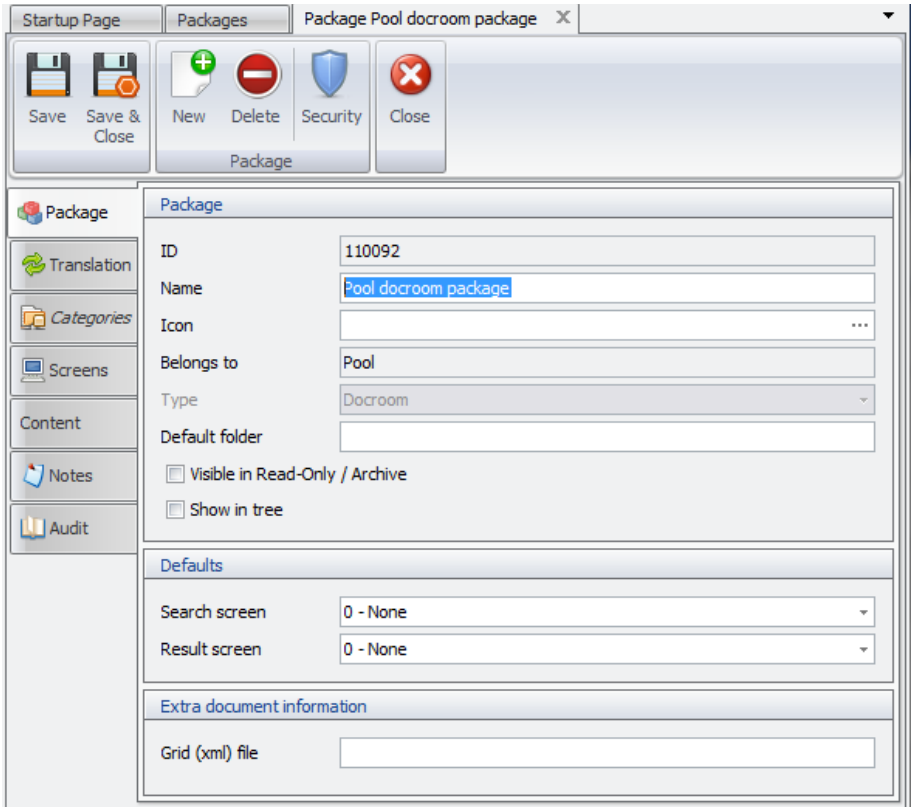
Toggling between the types will show/hide other fields.
Note: after saving this package, the type cannot be changed afterwards.

Click “Save” button in ribbon bar.

Extra tab pages are shown.

Continue with chapter 2.9 “Edit package”.

2.9 Edit package



Ribbon bar	
Save	Save package.
Save & Close	Save package and close this screen.
New	Clear input form.
Delete	Delete package. **Please read the warning carefully.**
Security	Set edit & view rights. This is described in manual “DocRoom 6 - Application Administrator Manual - 14 - Security and Action Profiles”, chapter 3.1.
Close	Close package. A warning is given when you have data which is not saved yet.

Note. After configuring a package, you can add this package as a screen item in the existing screens of categories, procedures and steps in order to appear the package in the web interface. Go to chapter 3 for an overview of the packages in the web interface.

2.9.1 Tab Package

2.9.1.1 DocRoom & Workflow

Package		
Package	ID	Read only. Package internal number.
	Name	Name of the package.
	Icon	Empty= default icon =

		Press button "…" to select an icon.
	Belongs to	Read only. "Pool", category name or procedure name.
	Type	Read only. DocRoom (DocRoom package) or CasePackage (Workflow package).
	Default folder	Location where the content is created. **Note**: default folder of category is applied if default folder of category is filled in (*1)
	Visible in Read-Only / Archive	Checked: package is shown in read only or archive mode Not checked: package is not shown in read only or archive mode
	Show in tree	Checked: package is shown in the tree as sub nodes of folders and dossiers. Field "Grid (xml) file from tree" is visible. Not checked: package is not shown in the tree. Field "Grid (xml) file from tree" is hidden. This option is used for folder and dossier categories.
Defaults	Search screen	Drop down with defined search screens. This search screen will be used when adding content to a package.
	Result screen	Drop down with defined result screens. This result screen will be used when adding content to a package.
Extra doc information	Grid (xml) file	XML file which contain the layout of the package in detail screen. Empty = Default = PackageGrid.xml (*2)
	Grid (xml) file from tree	XML file which contain the layout of the package in list screen. This file is used when you click on the package in the tree. Empty = Default = BrowseGrid.xml This field is shown when "Show in tree" is checked. (*2)

(*1) Default folder

Default folder of category	Default folder of package	Content is stored in folder
Not empty	Empty	Default folder of category
Empty	Not empty	Default folder of package
Not empty	Not empty	Default folder of category
Empty	Empty	Root folder

(*2) The content of the file is explained in manual "DocRoom 6 – Application Administrator Manual – 12 – Screens & Site Management".

2.9.1.2 DocRoom query & Workflow query

Package		
Package	ID	Read only. Package internal number.
	Name	Name of the package.
	Icon	Empty= default icon = Press button "…" to select an icon.
	Belongs to	Read only. "Pool", category name or procedure name.

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	Type	Read only. Query (DocRoom query package) or CaseQuery (Workflow query package).
	Visible in Read-Only / Archive	Checked: package is shown in read only or archive mode Not checked: package is not shown in read only or archive mode
	Show in tree	Checked: package is shown in the tree as sub nodes of folders and dossiers. Field “Grid (xml) file from tree” is visible. Not checked: package is not shown in the tree. Field “Grid (xml) file from tree” is hidden. This option is used for folder and dossier categories.
Defaults	Search screen	Drop down with defined search screens. This search screen will be used when adding content to a package.
	Result screen	Drop down with defined result screens. This result screen will be used when adding content to a package.
Extra doc information	Grid (xml) file	XML file which contain the layout of the package in detail screen. Empty = Default = PackageGrid.xml (*)
	Query	XML or predefined query (drop down).
	XML	Enabled when Query = XML. Caml query syntax: same xml syntax as used in the search object.
	Grid (xml) file from tree	XML file which contain the layout of the package in list screen. This file is used when you click on the package in the tree. Empty = Default = BrowseGrid.xml This field is shown when “Show in tree” is checked. (*)

(*) The content of the file is explained in manual “Doma 6_ Application Administrator Manual_12_ Screens & Site Management”.

2.9.1.3 Sharepoint

Package		
Package	ID	Read only. Package internal number.
	Name	Name of the package.
	Icon	Empty= default icon = Press button “…” to select an icon.
	Belongs to	Read only. “Pool”, category name or procedure name.
	Type	Read only. Sharepoint.
	Visible in Read-Only / Archive	Checked: package is shown in read only or archive mode Not checked: package is not shown in read only or archive mode
Extra doc information	Grid (xml) file	XML file which contain the layout of the package in detail screen. Empty = Default = PackageGrid.xml (*)

(*) The content of the file is explained in manual “DocRoom 6 – Application Administrator Manual – 12 – Screens & Site Management”.

All Sharepoint packages are linked to one Sharepoint. The Sharepoint location has to be set in ArcoInfo: Category Sharepoint, parameter URL.

Short description of the xml file:

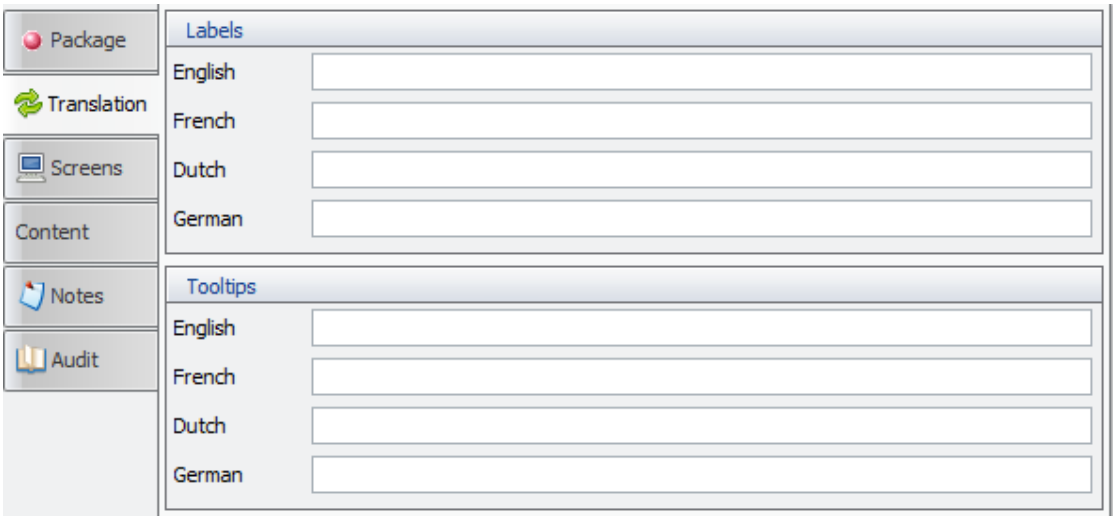
```
<?xml version="1.0" encoding="utf-8" ?>
<packageinformation>
  <site></site>
  <list>Shared Documents</list>
  <fields>
    <field>
      <internalname>FileLeafRef</internalname>
      <displayname>Name</displayname>
      <fieldtype>File</fieldtype>
    </field>



  </fields>
</packageinformation>
```

`site` = site name in Sharepoint (empty = default)
`list` = name of the document list
`fields` = fields to be shown in the package grid, these fields must have the same names as defined in Sharepoint.

2.9.2 Tab Translation



Translation		
Labels	English	Name of the package in English
	French	Name of the package in French
	Dutch	Name of the package in Dutch
	German	Name of the package in German
Tooltips	English	Description of the package in English
	French	Description of the package in French
	Dutch	Description of the package in Dutch
	German	Description of the package in German

These labels are used in the web interface.

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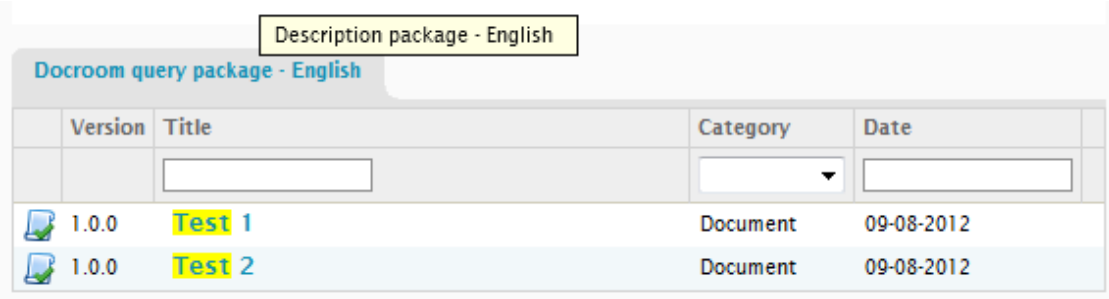
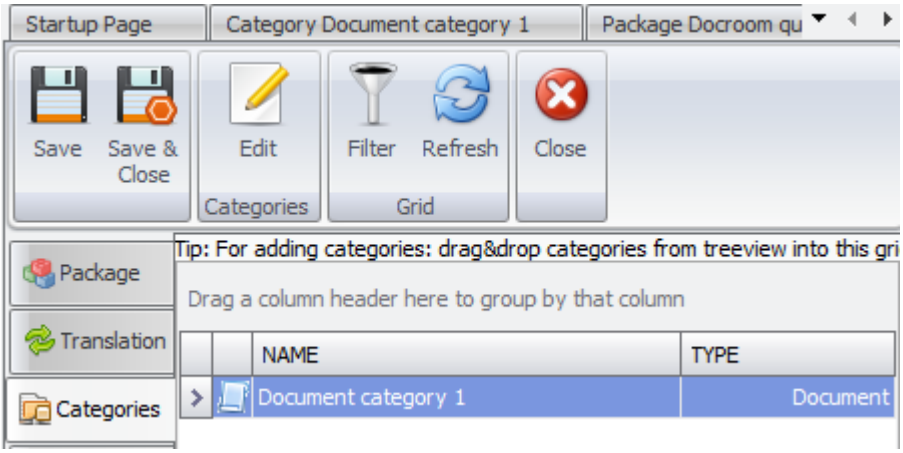
E.g.:
English label = DocRoom query package – English
English tooltip = Description package – English



2.9.3 Tab Categories

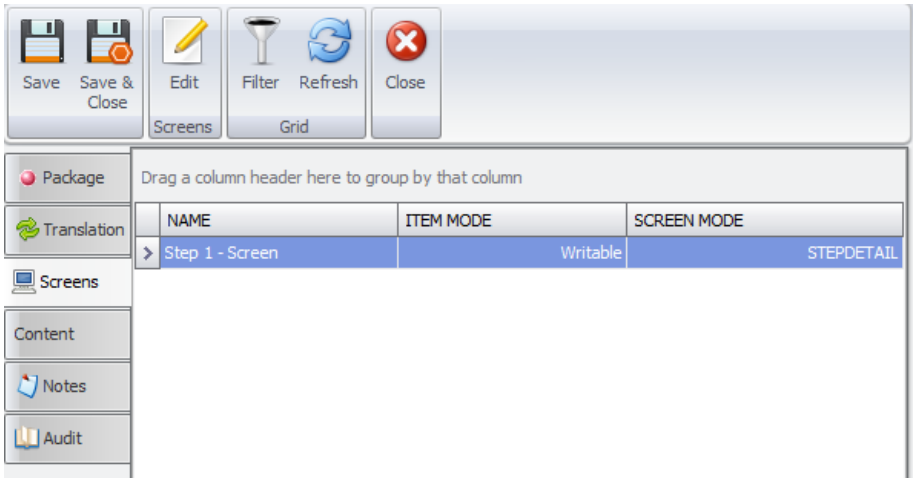
This tab page is only visible if package is of type Pool.



On this tab page, you can find a list of all categories where the package is in use.
This can be very helpful to know the impact of changes on the pool package.

From here, you can open the detail screen of one of the categories: select one of the categories and press the “Edit” button in the ribbon bar.

2.9.4 Tab Screens



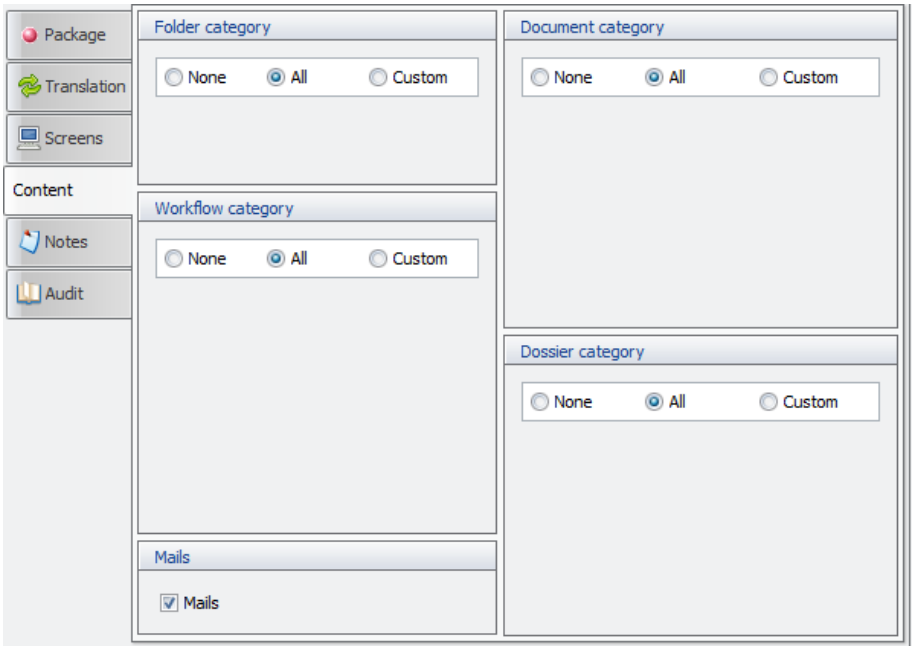
A list of all screens where this package is referenced as screen item is shown in this tab page.
How to add a package to a screen is explained in another document: “Doma 6_Application Administrator Manual_12_Screens & Site Management”.

From here, you can open the detail screen of one of the screens: select one of the screens and press the “Edit” button in the ribbon bar.

2.9.5 Tab Content

This tab page is only visible if package is one of the following types:
- DocRoom
- Workflow
- DocRoom query
- Workflow query

2.9.5.1 DocRoom & DocRoom query



Content		
Folder category	None	No folders allowed in this package.
	All	All types of folders allowed in this package.
	Custom	A limited set of types of folders are allowed in this package. (*)
Document category	None	No documents allowed in this package.
	All	All types of documents allowed in this package.
	Custom	A limited set of types of documents are allowed in this package. (*)
Workflow category	None	No workflows allowed in this package.
	All	All types of workflows allowed in this package.
	Custom	A limited set of types of workflows are allowed in this package. (*)
Dossier category	None	No dossiers allowed in this package.
	All	All types of dossiers allowed in this package.
	Custom	A limited set of types of dossiers are allowed in this package. (*)

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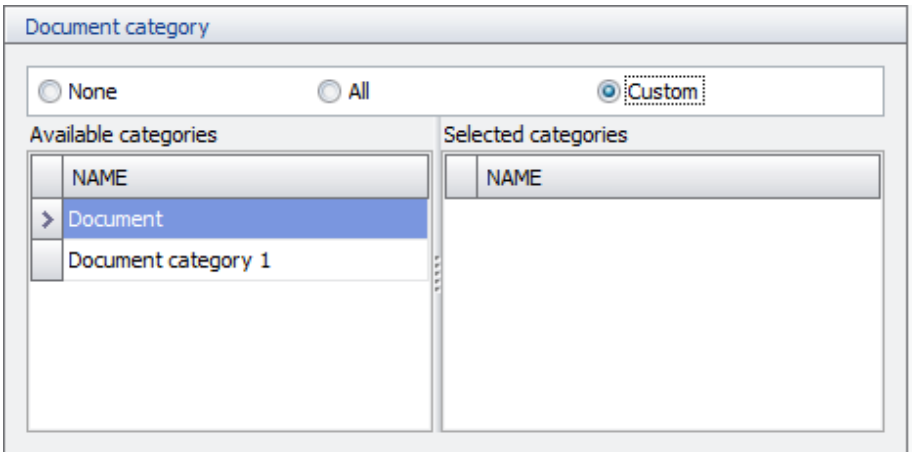
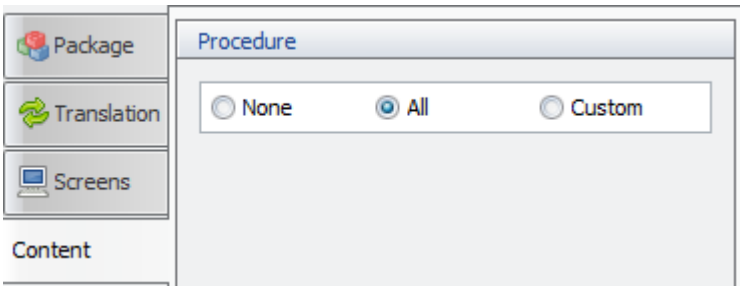
Mails	Checked	Mails allowed in this package.
	Not checked	No mails allowed in this package.

(*) Custom



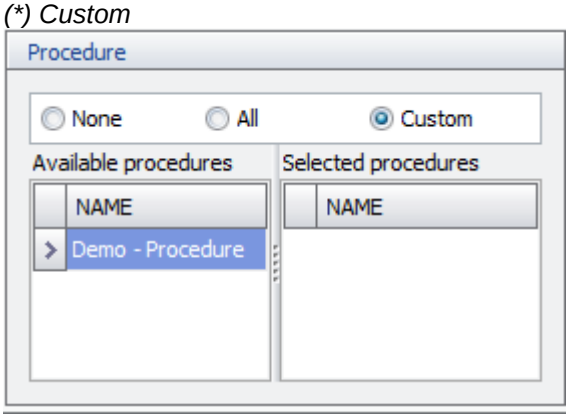
Make your selection by drag and dropping the categories. It's possible to drag more than one category in once.

2.9.5.2 Workflow & Workflow query



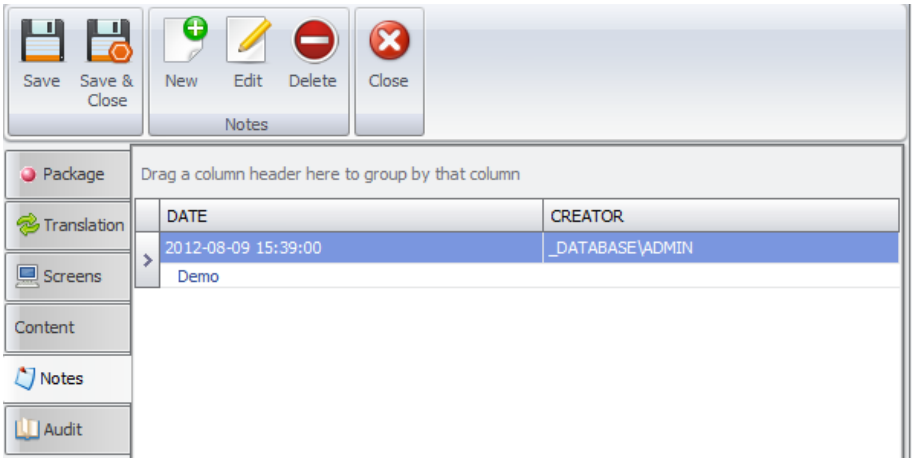
Content		
Procedure	None	No routing workflows allowed in this package.
	All	All types of routing workflows allowed in this package.
	Custom	A limited set of types of routing workflows are allowed in this package. (*)

(*) Custom



Make your selection by drag and dropping the procedures. It's possible to drag more than one procedure in once.

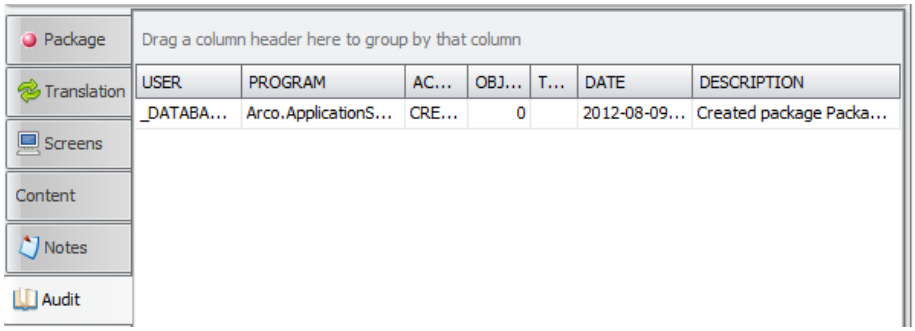
2.9.6 Tab Notes



On this tab page, you can manage the notes of the package. The notes are shown in all package grids in the Doma admin module.
E.g. A short description of the package, warnings about the package, reason of modification of the package, …

Ribbon bar	
New	Enter a new note in a popup screen.
Edit	Edit the selected note in a popup screen.
Delete	Delete the selected note.

2.9.7 Tab Audit



On this tab page, you can view the list of actions performed on this package. This list cannot be modified.

2.10 Delete package

A package can be deleted but this will delete all package content of all DocRoom objects. Remember, pool packages are linked to several categories, deletion of the package will involve a lot of DocRoom objects.

The package configuration can be deleted at 4 places in the Doma admin module:

- Pool packages list screen (only for pool packages). **Not preferable.**
- Category detail screen – tab Packages
- Procedure detail screen – tab Packages
- Package detail screen

When you delete a pool package in category detail screen or procedure detail screen, the package will still exist in other categories.

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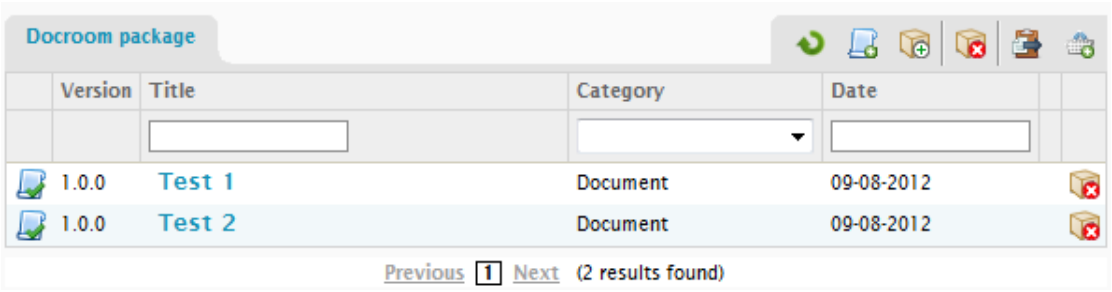
A warning is displayed explaining the effect on DocRoom objects. **Please do not ignore this warning. Read this warning carefully.**

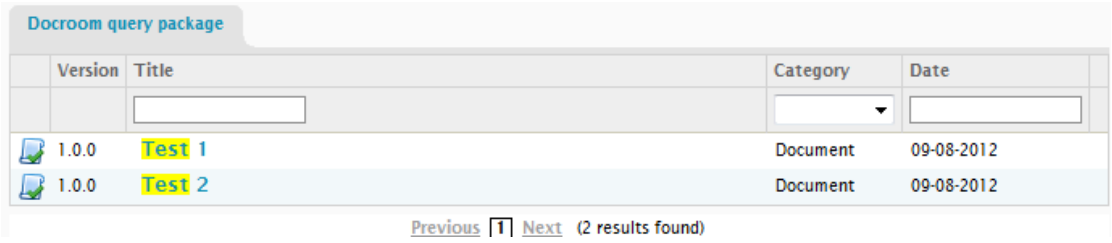
3 Use of packages in DocRoom Web

After configuring the packages in the Doma admin module, the user is able to view/edit the packages.
In the user manual is explained how to manage content in the packages.

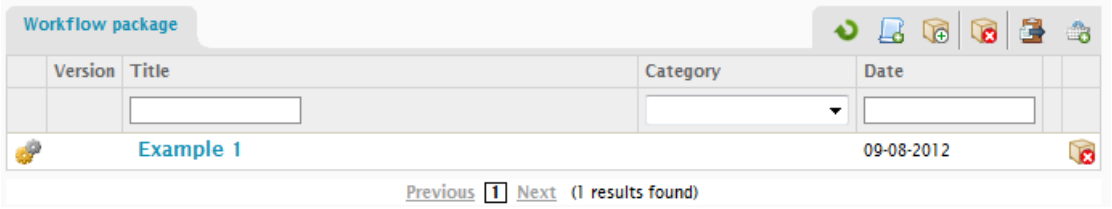
3.1 DocRoom package



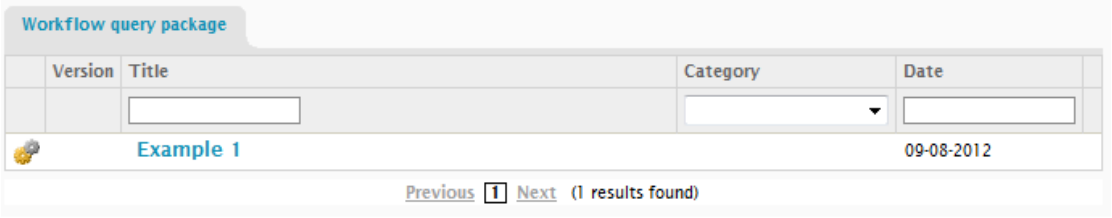
3.2 DocRoom query package



3.3 Workflow package



3.4 Workflow query package



3.5 Sharepoint package

4 Use of packages in ACL

Please refer to manual “Doma 6_ Application Administrator Manual _14_ Security and Action Profiles”. Chapter 3.1.

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5 Example

5.1 Example with DocRoom and Workflow package

A project (document category) can have several documents: project definition, one or more manuals and workflows.

5.1.1 Configuration

Procedure "Create new project"

Create new project	
Name	Create new project
Default priority	Medium
Auto name	RequiredName
Property 1	Project number (Number)
Property 2	Short description (String)

Create a dummy workflow.

Document category "Project definition"

Project definition	
Name	Project definition
Create documents in folder	Demo\Projects\Project definitions
Auto name	RequiredName
File cardinality	ExactOne
Pool property	Project number (Number)

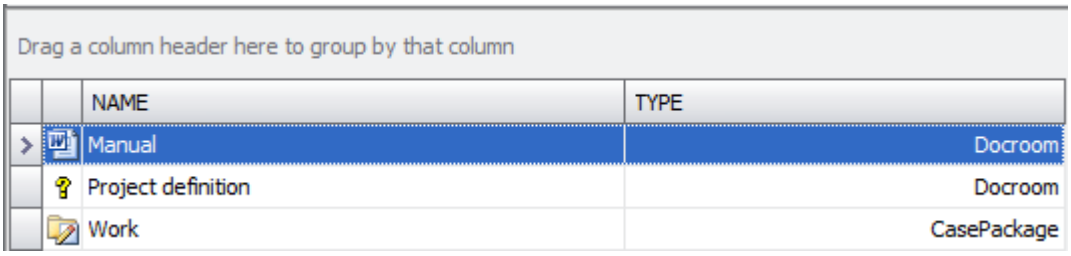
Document category "Manual"

Manual	
Name	Manual
Create documents in folder	Demo\Projects\Manuals
Auto name	RequiredName
File cardinality	AtLeastOne
Pool property	Project number (Number)

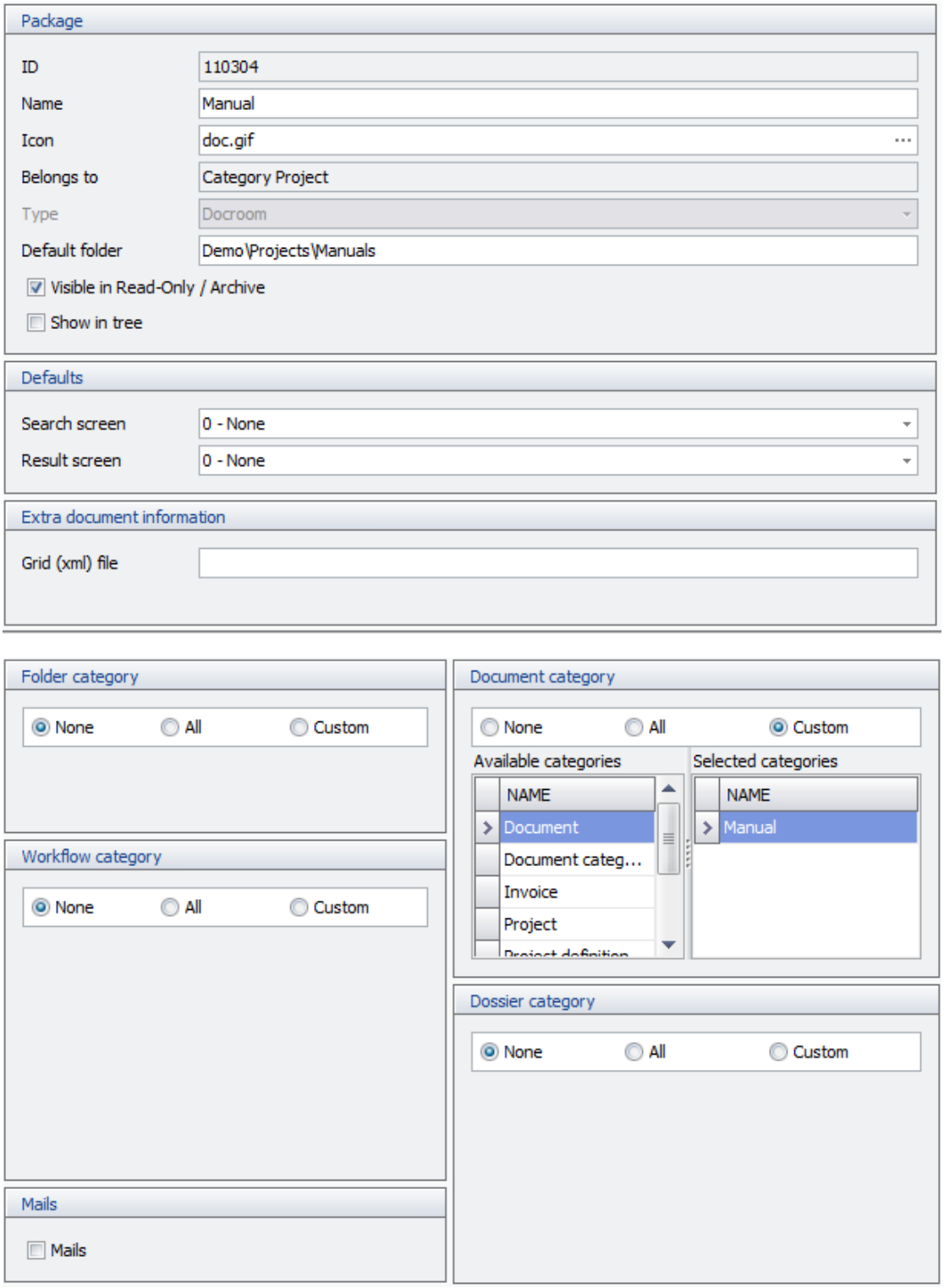
Document category "Project"

Project	
Name	Project
Create documents in folder	Demo\Projects
Auto name	RequiredName
Input package	Project definition
File cardinality	NotAllowed
Pool property	Project number (Number)
Category property	Short description (String)

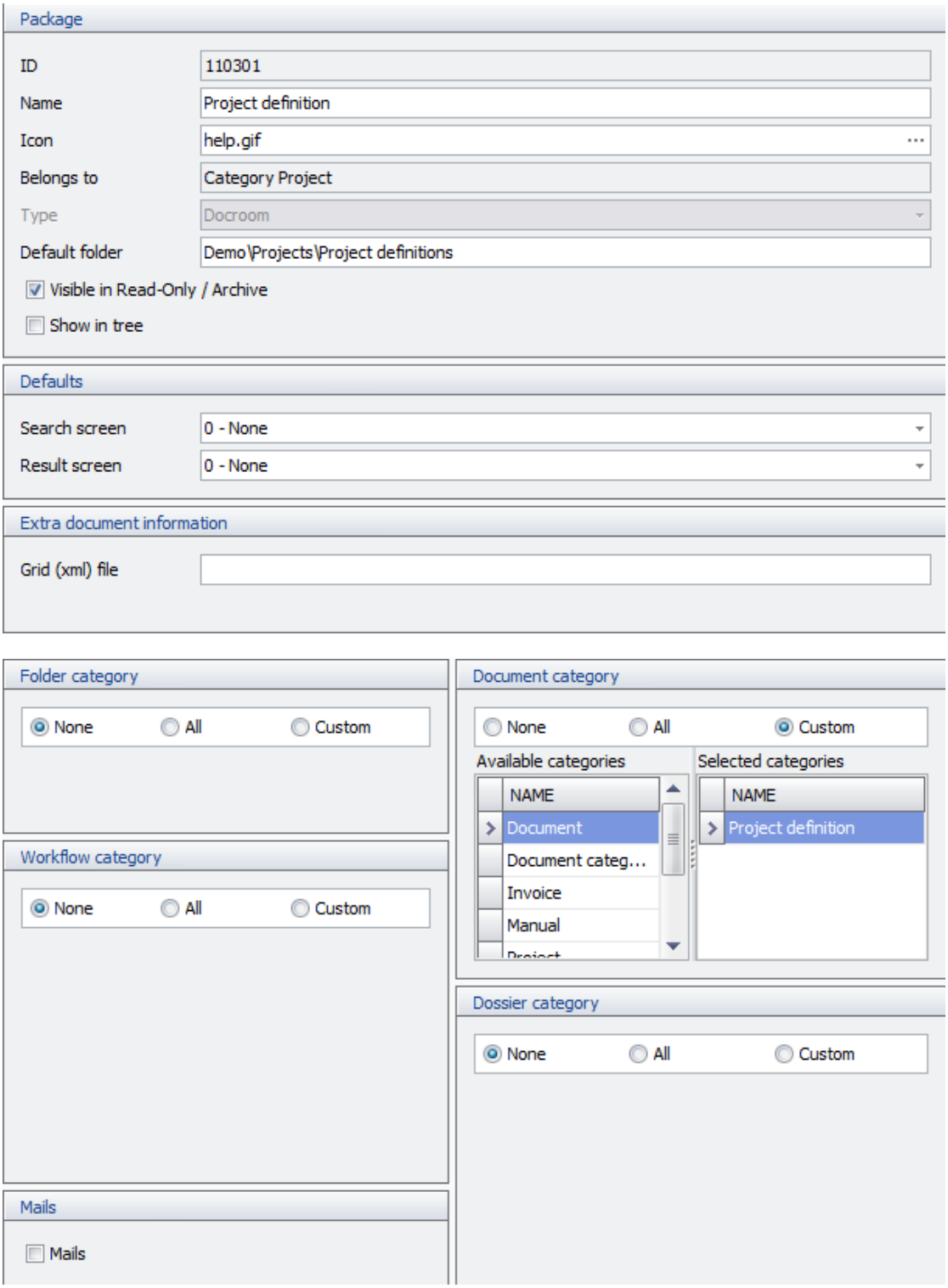
Packages



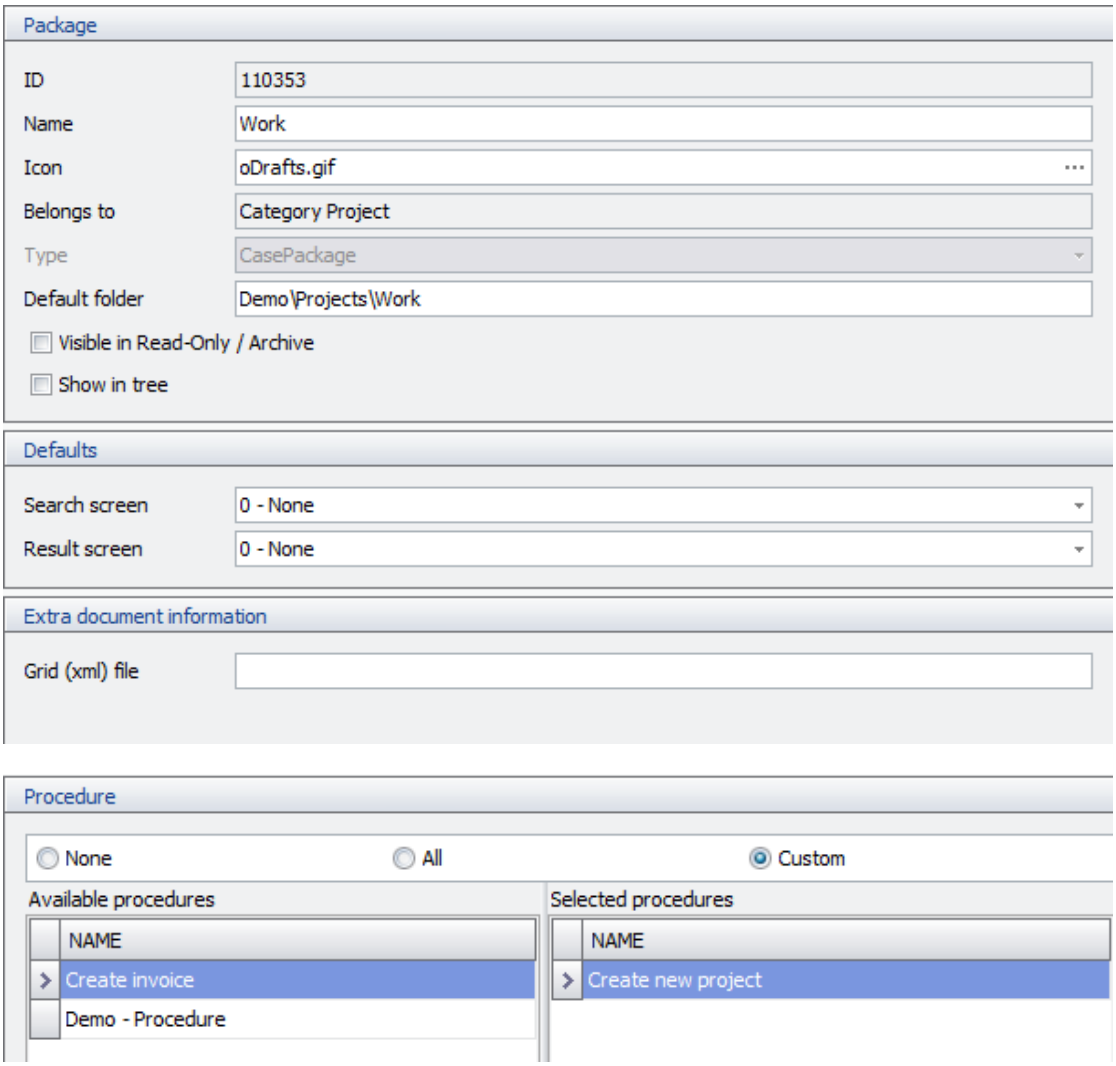
Package "Manual"



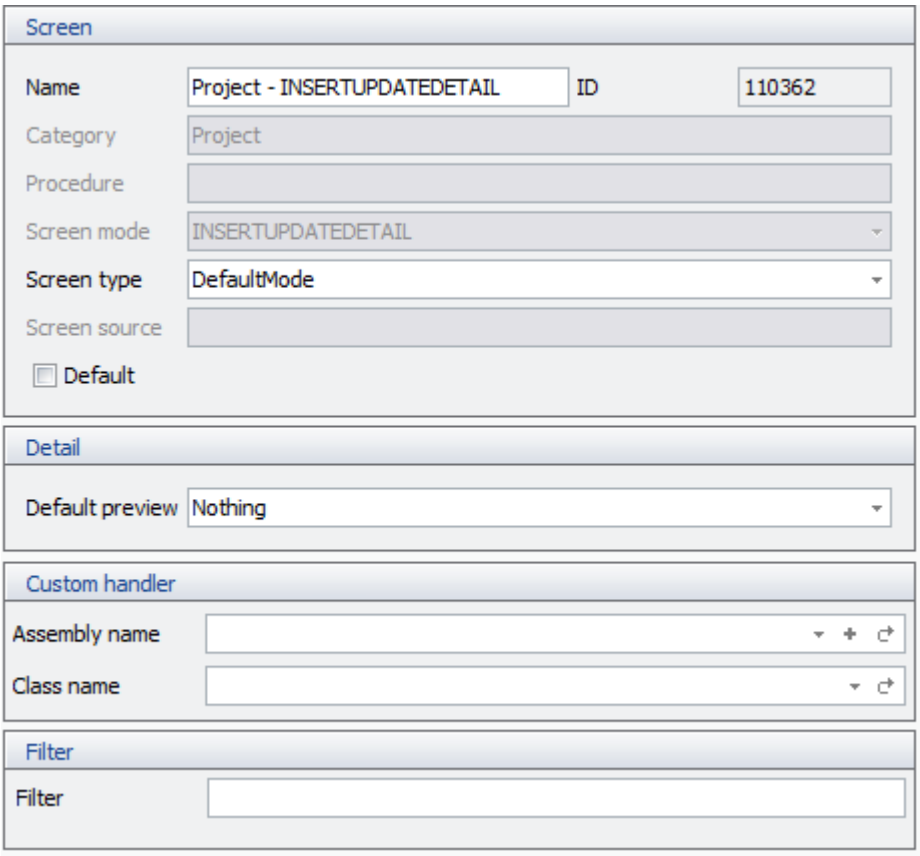
Package "Project definition"



Package "Work"



Screen

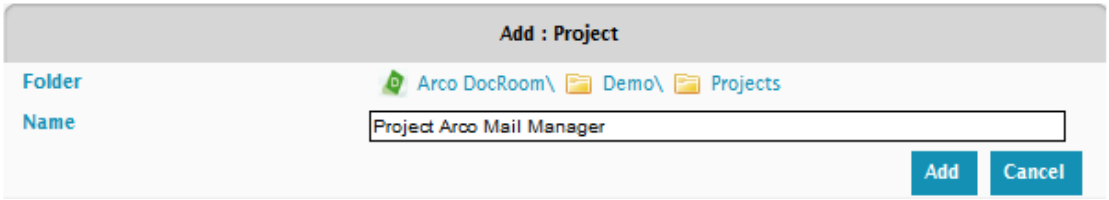


Selected screen items

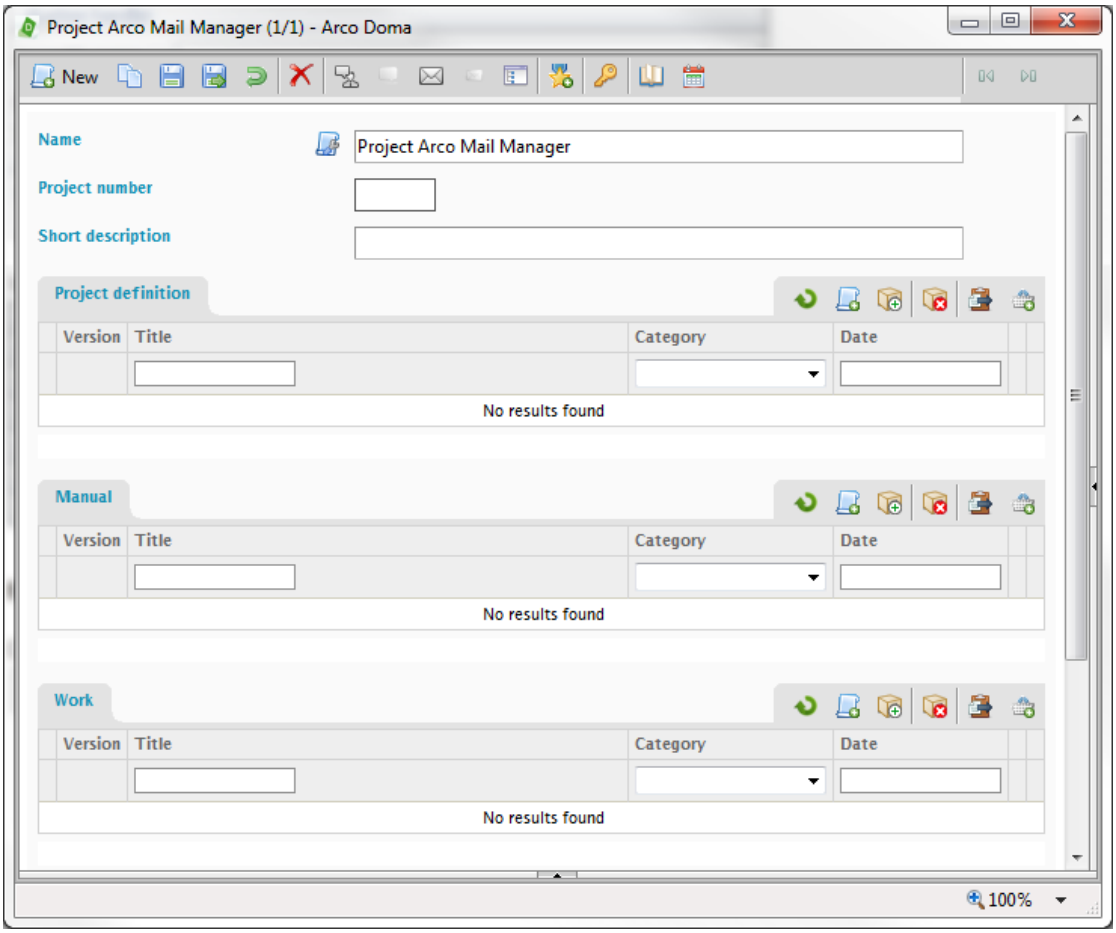
	NAME	MODE	DEFAULT VALUE	IDENTIFIER	HALF LINE
>	Name	Writable		Name	☐
	Project number	Writable		Project number	☐
	Short description	Writable		Short description	☐
	Project definition	Writable		Project definition	☐
	Manual	Writable		Manual	☐
	Work	Writable		Work	☐

5.1.2 Result in DocRoom Web

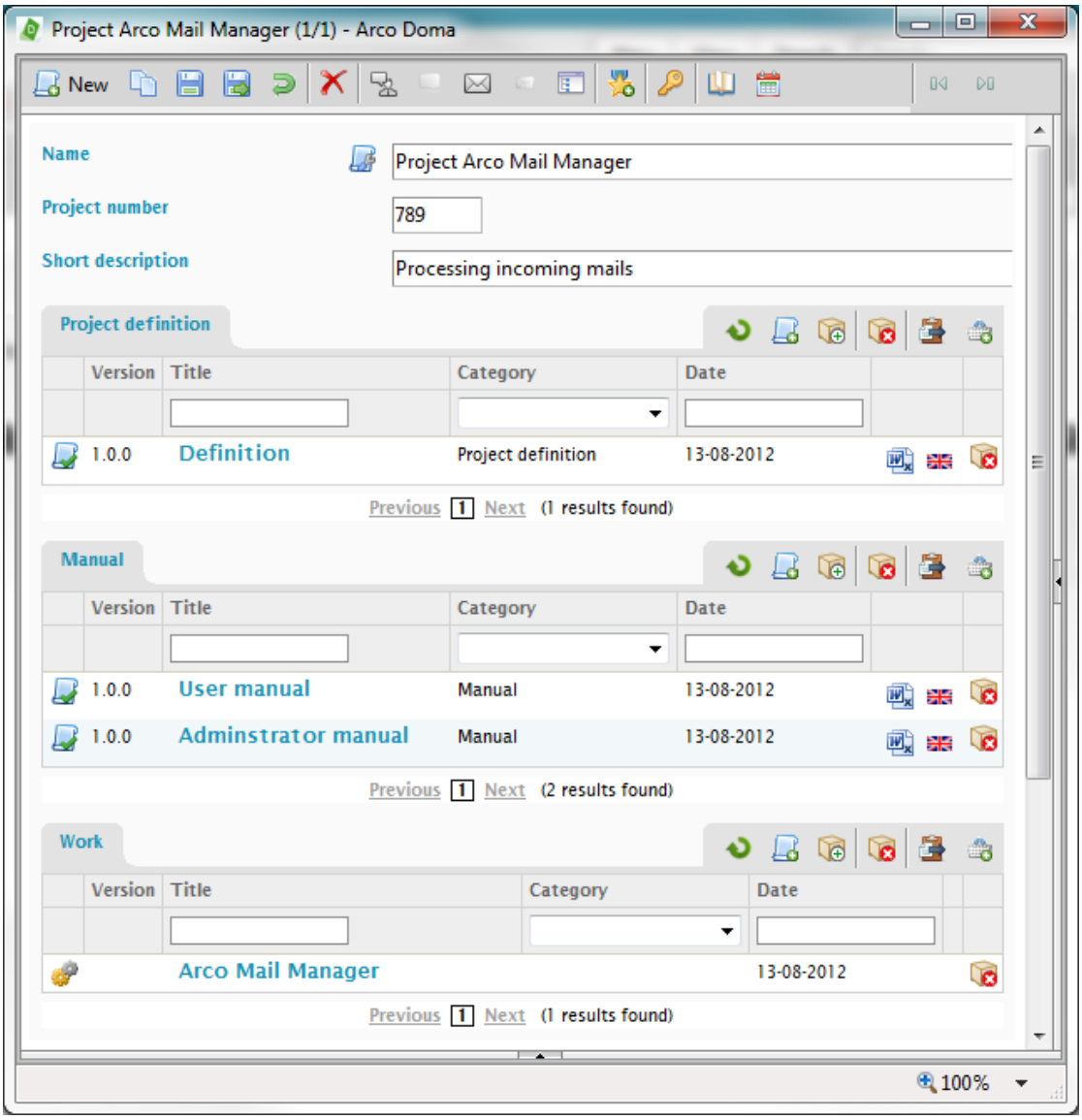
Create new project.



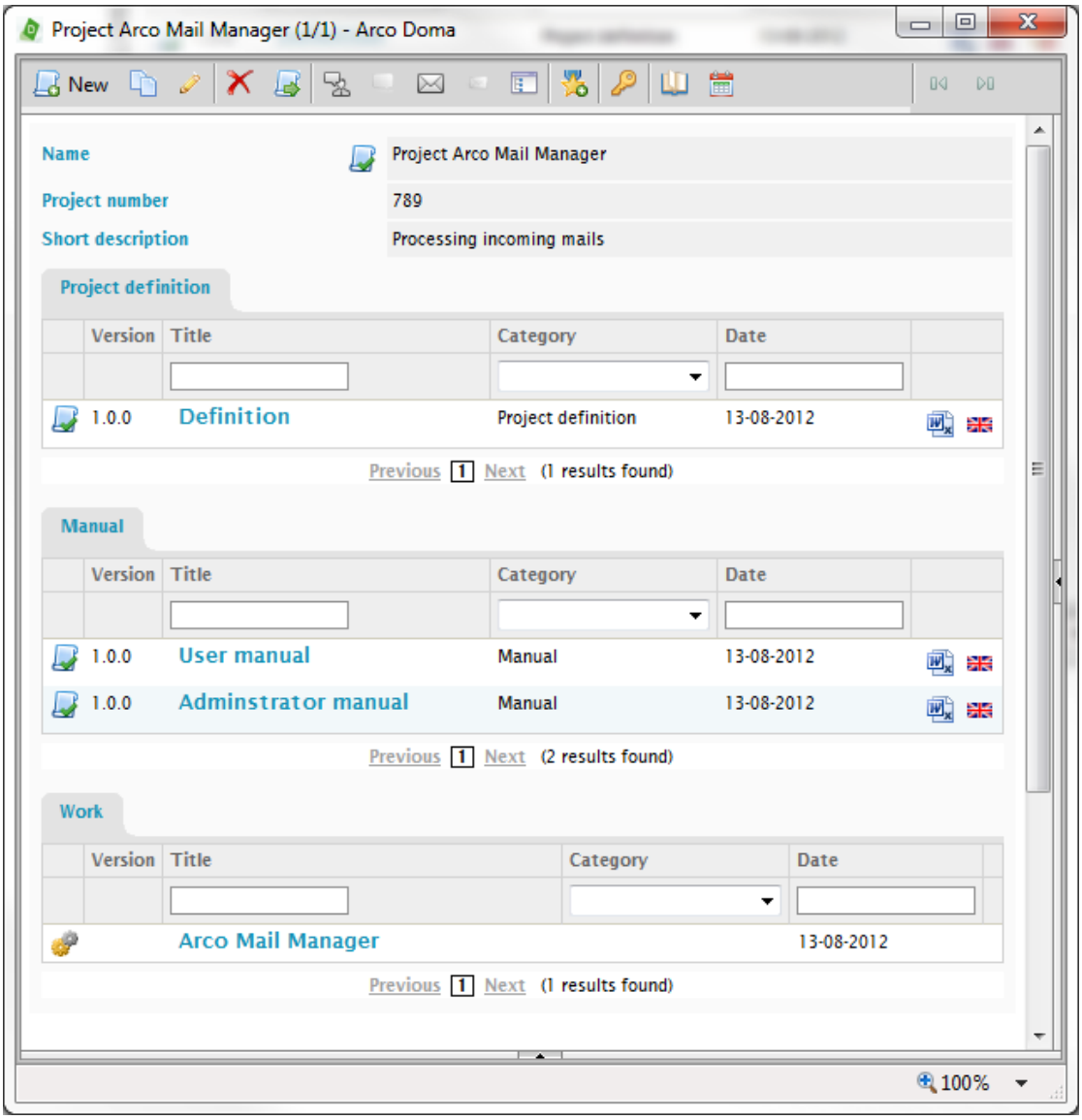
Click “Add” button.



Enter data, create new project definition, some manuals and create work.



Click “Save” button.



5.2 Example with DocRoom query package

A project (document category) can have several documents: project definition and one or more manuals. These documents are automatically fetched by project number. The package contains read only content.

5.2.1 Configuration

Document category "Project definition"

Project definition	
Name	Project definition
Create documents in folder	Demo\Projects\Project definitions
Auto name	RequiredName
File cardinality	ExactOne
Pool property	Project number (Number)

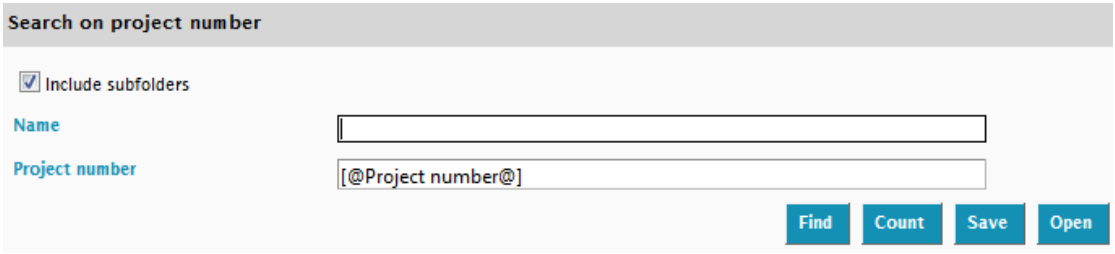
Document category "Manual"

Manual	
Name	Manual
Create documents in folder	Demo\Projects\Manuals
Auto name	RequiredName
File cardinality	AtLeastOne
Pool property	Project number (Number)

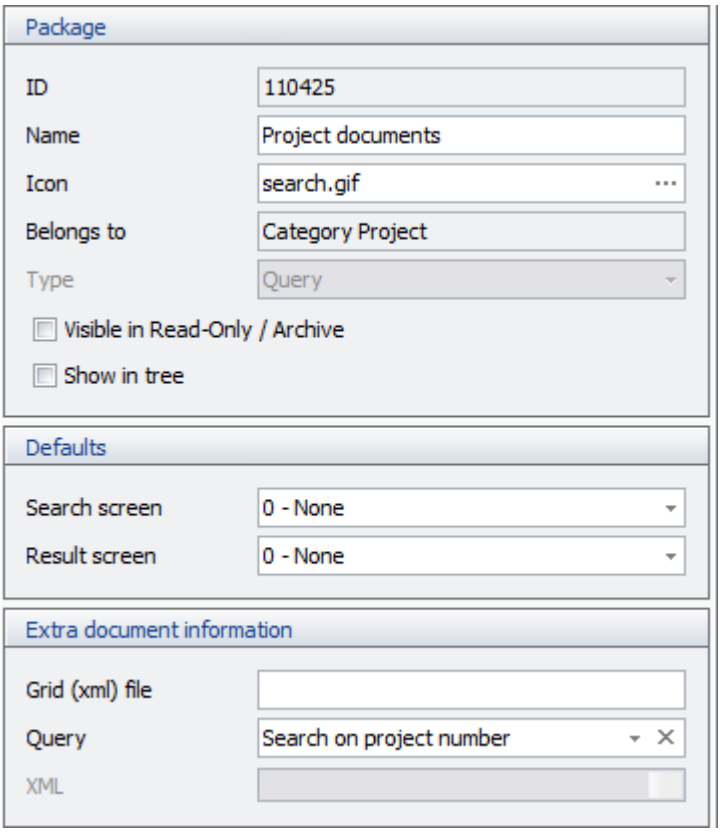
Document category "Project"

Project	
Name	Project
Create documents in folder	Demo\Projects
Auto name	RequiredName
Input package	Project definition
File cardinality	NotAllowed
Pool property	Project number (Number)
Category property	Short description (String)
Package	Project documents (DocRoom query package)

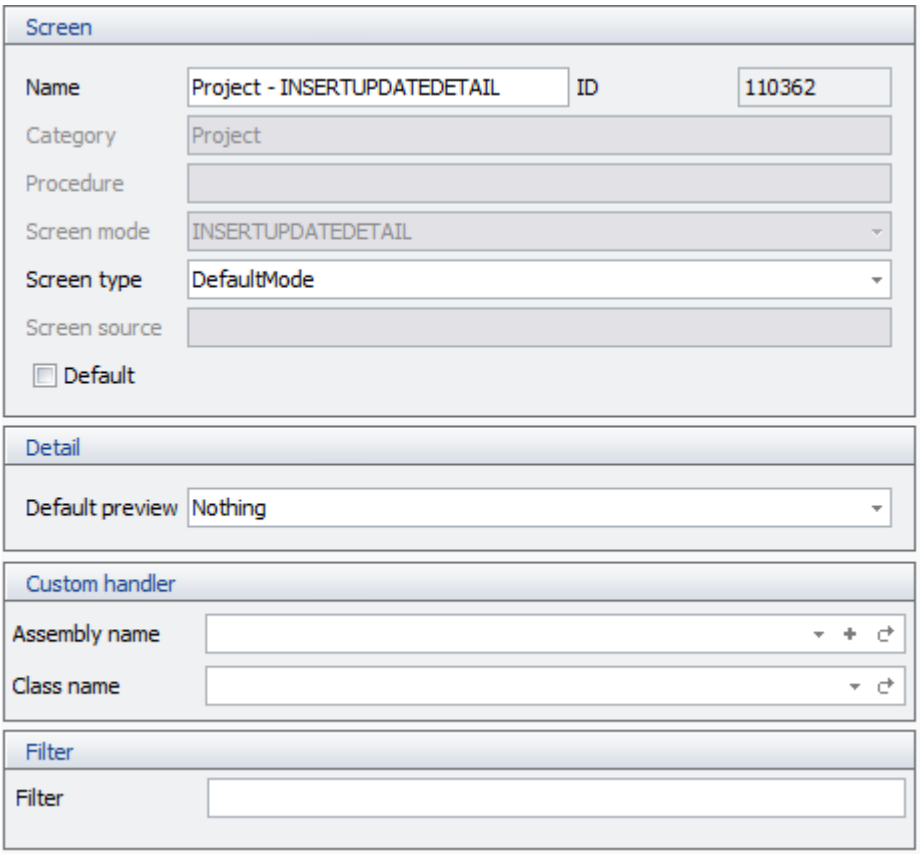
Query "Search on project number"



Package "Project documents"


Package
ID
110425
Name
Project documents
Icon
search.gif
Belongs to
Category Project
Type
Query
Visible in Read-Only / Archive
Show in tree
Defaults
Search screen
0 - None
Result screen
0 - None
Extra document information
Grid (xml) file
Query
Search on project number
XML

Screen


Screen
Name
Project - INSERTUPDATEDETAIL
ID
110362
Category
Project
Procedure
Screen mode
INSERTUPDATEDETAIL
Screen type
DefaultMode
Screen source
Default
Detail
Default preview
Nothing
Custom handler
Assembly name
Class name
Filter
Filter

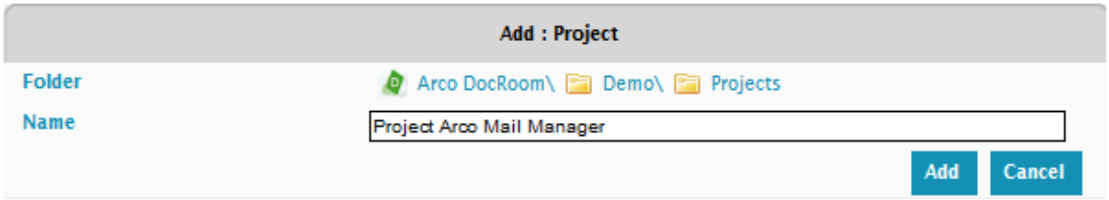
Selected screen items

	NAME	MODE	DEFAULT VALUE	IDENTIFIER	HALF LINE
>	Name	Writable		Name	
	Project number	Writable		Project number	
	Short description	Writable		Short description	
	Project documents	Writable		Project definitions	

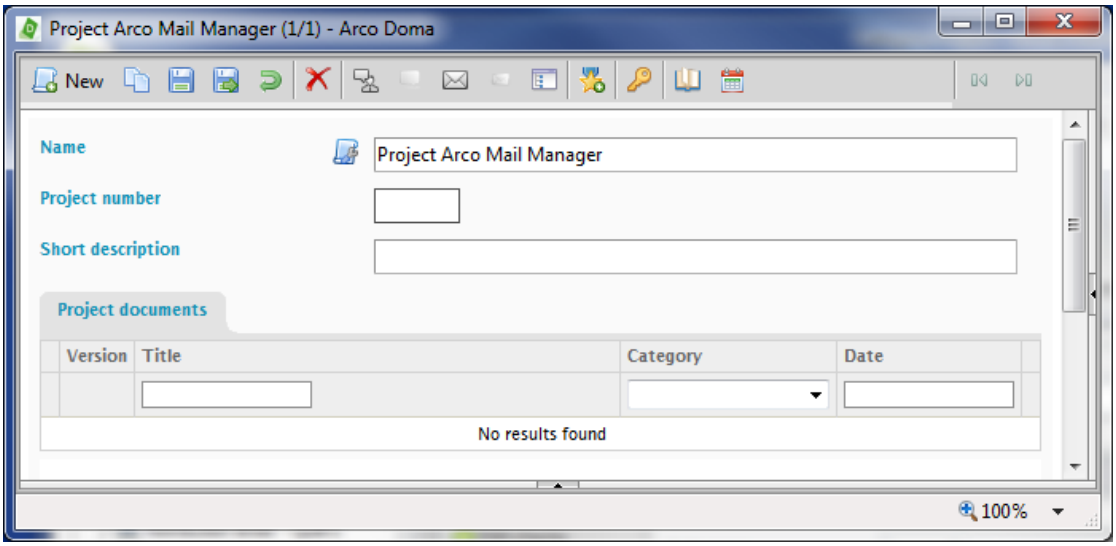
5.2.2 Result in DocRoom Web

Create one project definition and 2 manuals. For each document, use the same project number.

Create new project.

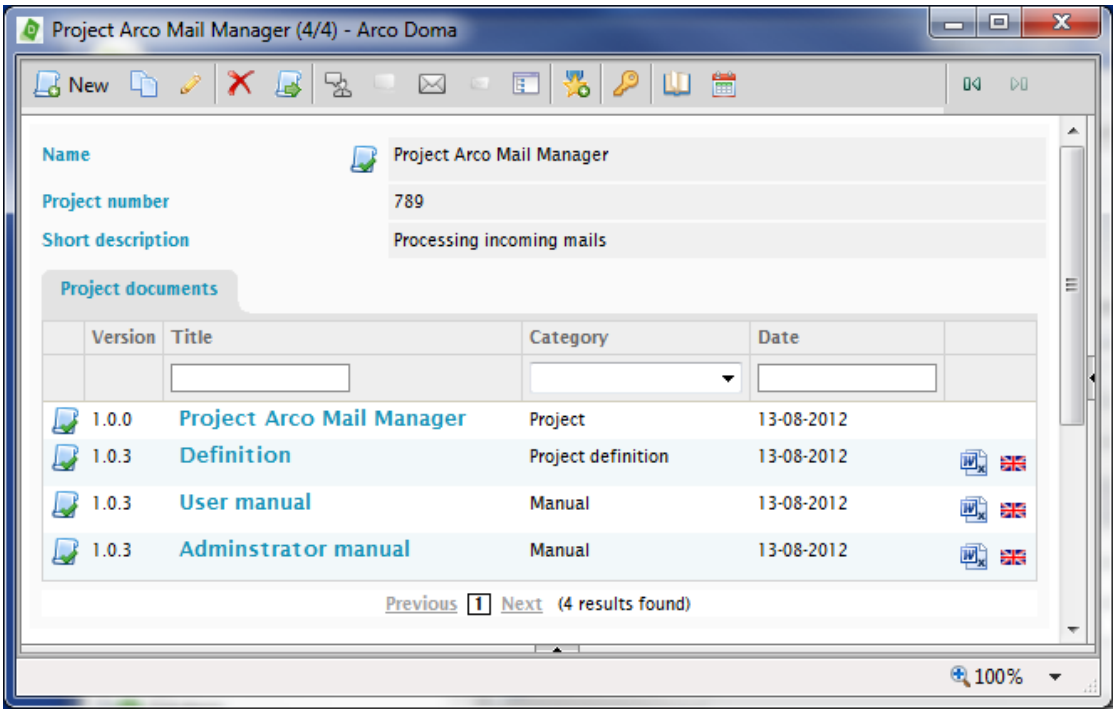


Click “Add” button.



Enter the same project number.

Click “Save” button.



5.3 Example with Workflow query package

A project (document category) can have several workflows: approval flows and more. These workflows are automatically fetched by project number. The package contains read only content.

5.3.1 Configuration

Workflow procedure "Approval flow"

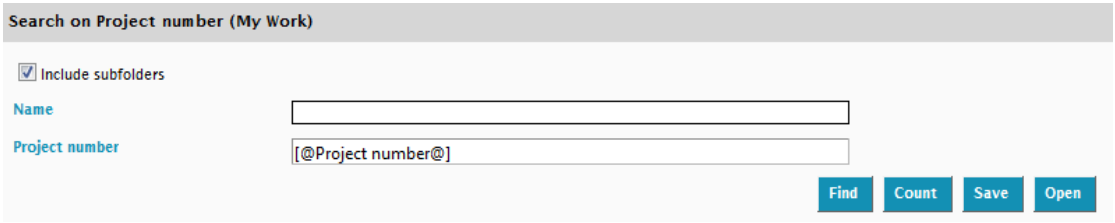
Approval flow	
Name	Approval flow
Default priority	Medium
Auto name	RequiredName
Pool property	Project number (Number)

Create a dummy workflow. Add "Project number" as screen item in first step.

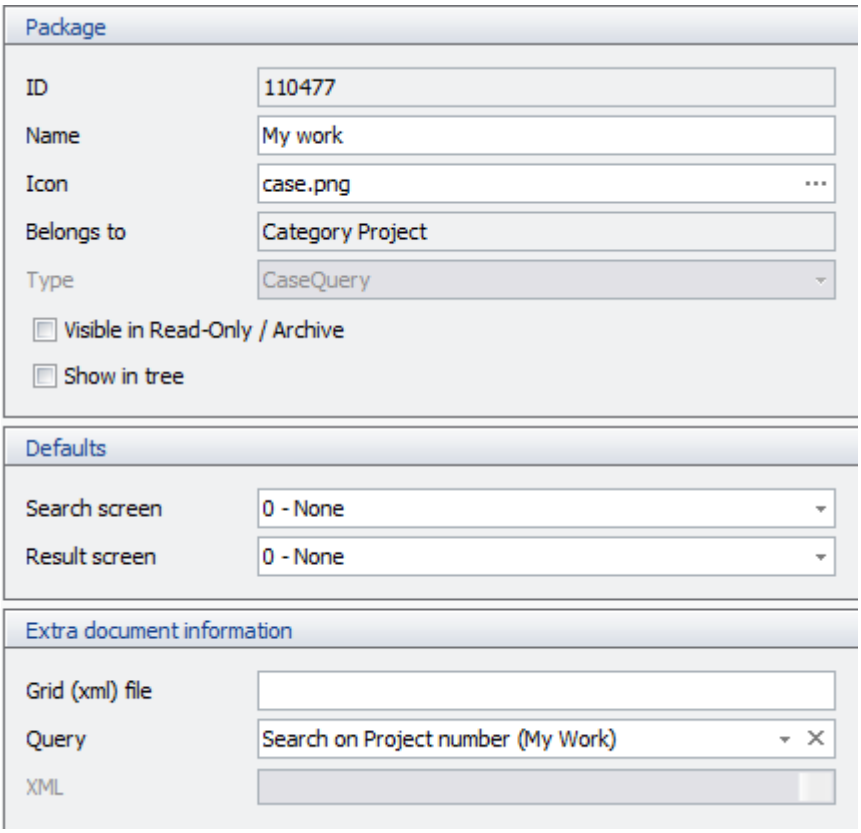
Document category "Project"

Project	
Name	Project
Create documents in folder	Demo\Projects
Auto name	RequiredName
Input package	Project definition
File cardinality	NotAllowed
Pool property	Project number (Number)
Category property	Short description (String)
Package	My work (Workflow query package)

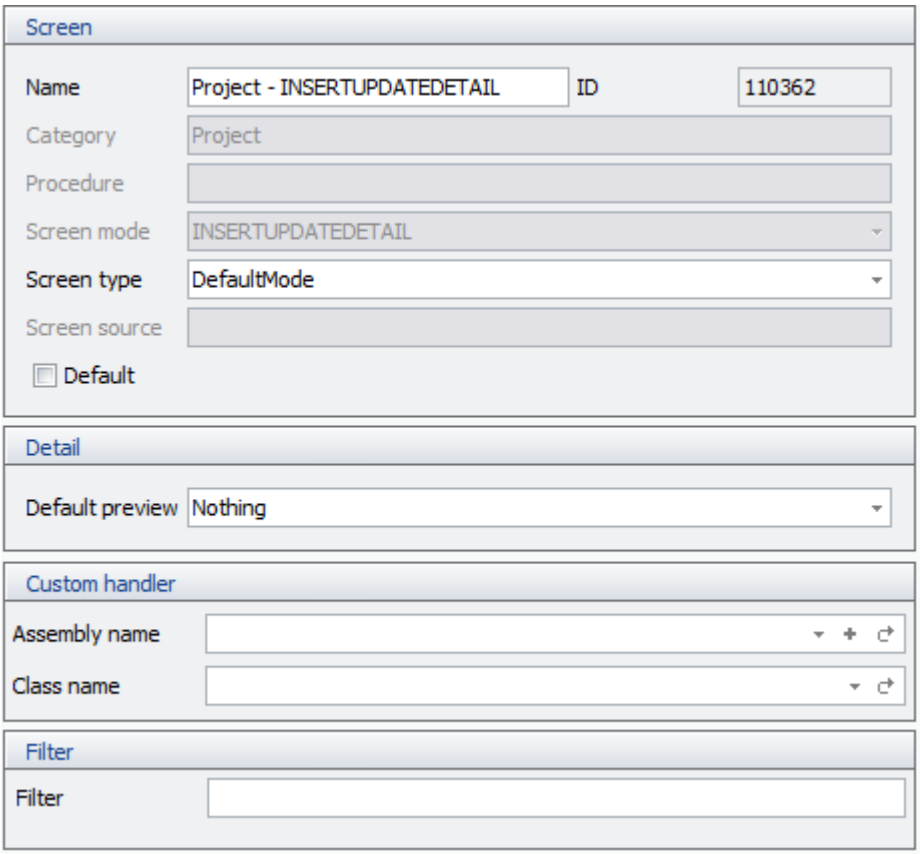
Query "Search on Project number (My Work)"



Package "My work"



Screen



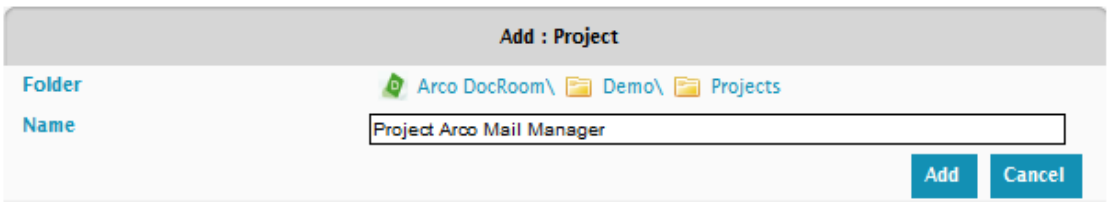
Selected screen items

	NAME	MODE	DEFAULT VALUE	IDENTIFIER	HALF LINE
>	Name	Writable		Name	
	Project number	Writable		Project number	
	Short description	Writable		Short description	
	My work	Writable		My work	

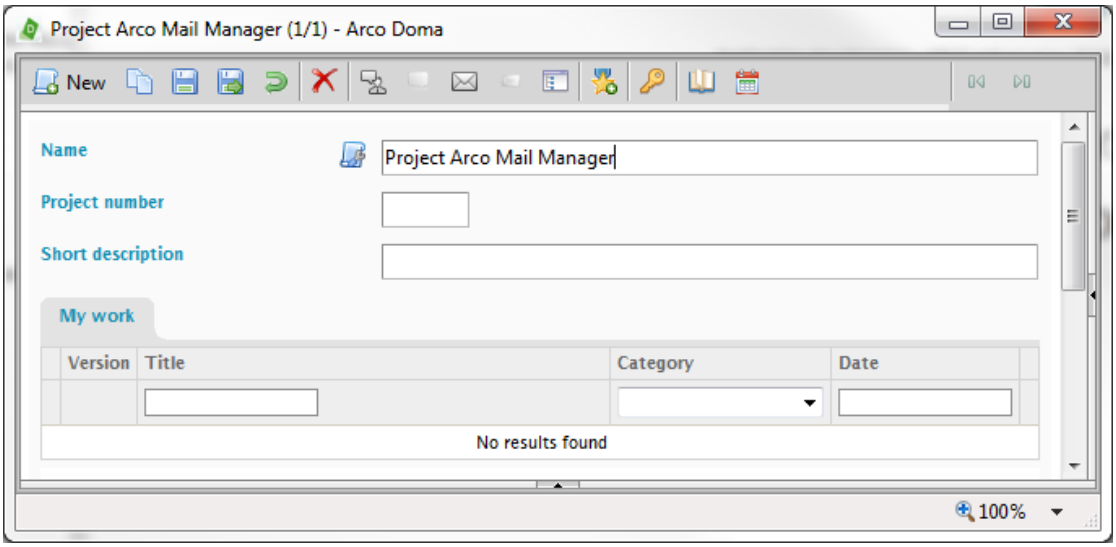
5.3.2 Result in DocRoom Web

Create one approval.

Create new project.

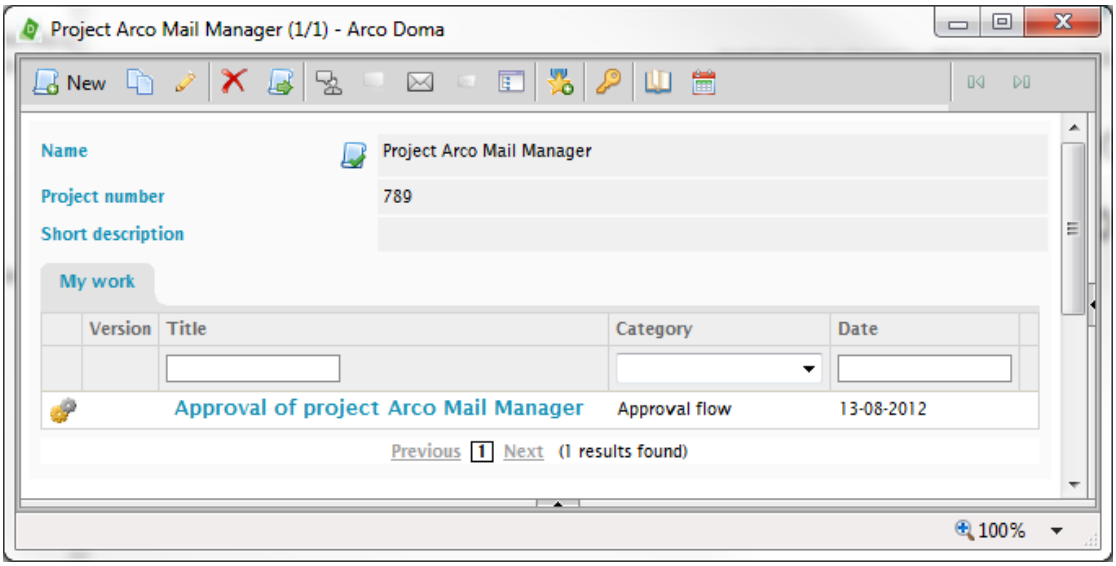


Click “Add” button.



Enter the same project number.

Click “Save” button.



5.4 Example with security

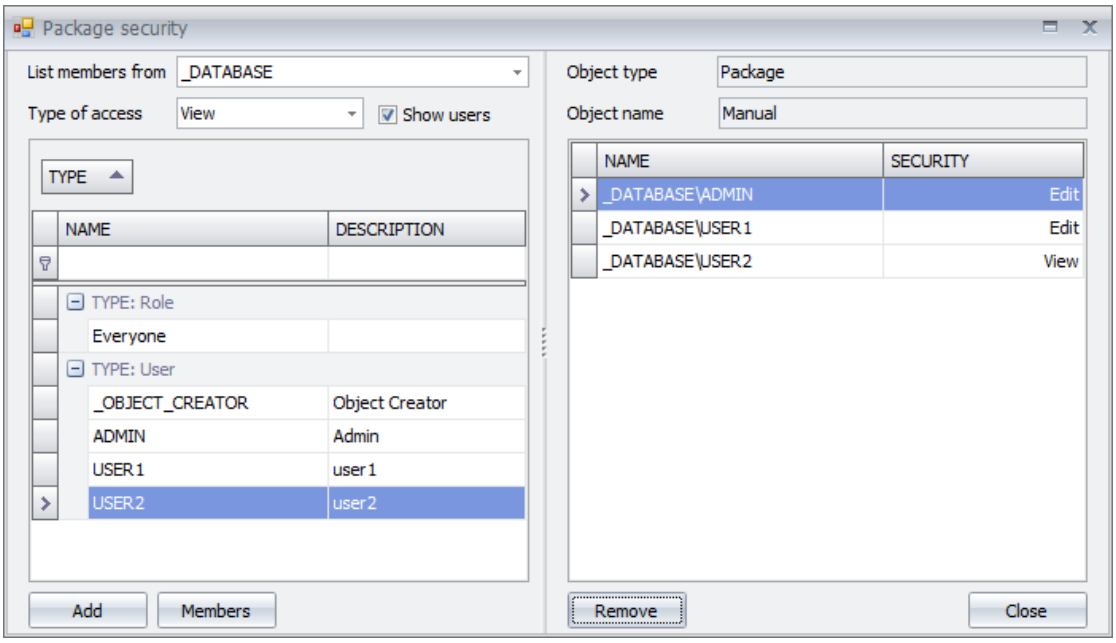
Create 3 users:

- Admin
- User1
- User2

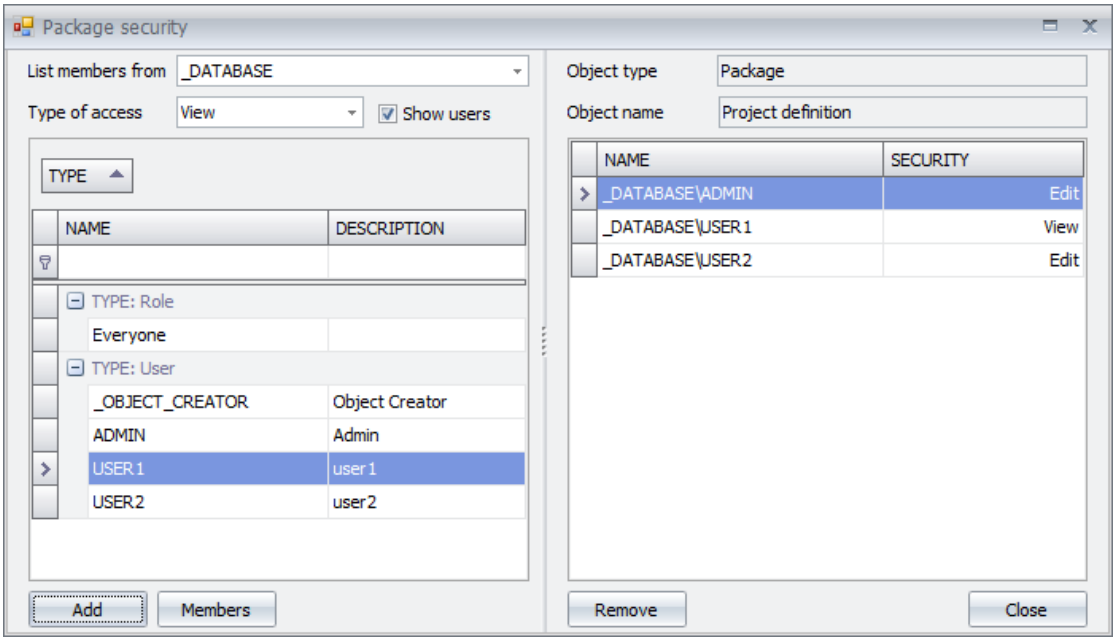
5.4.1 Configuration

Create the same configuration as in chapter 5.1.1.

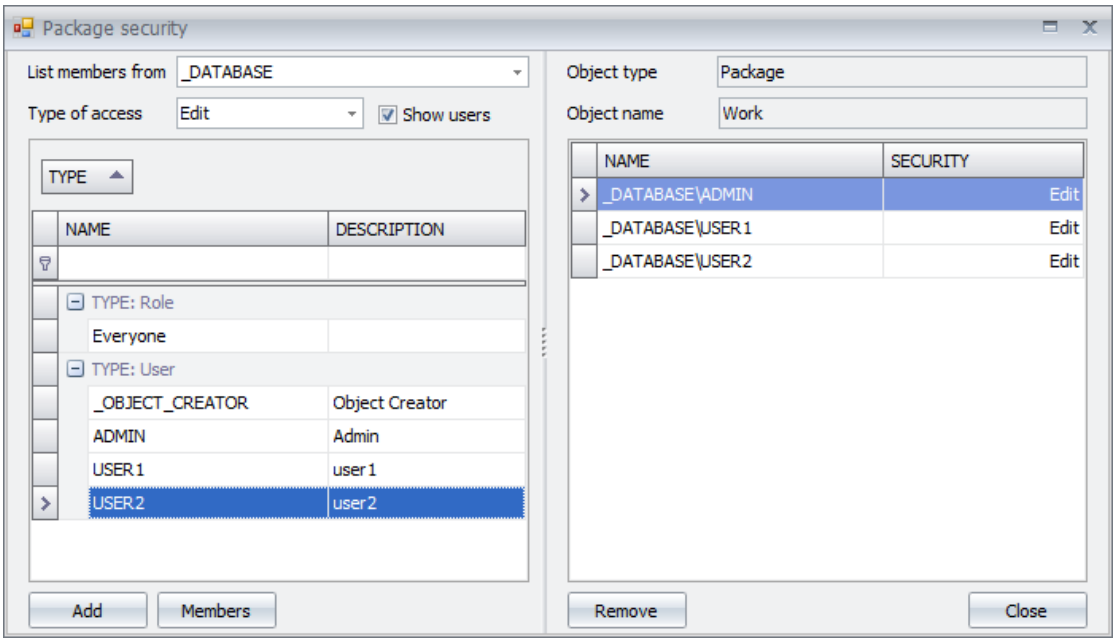
Package “Manual” Security



Package "Project definition" Security



Package "Work" Security

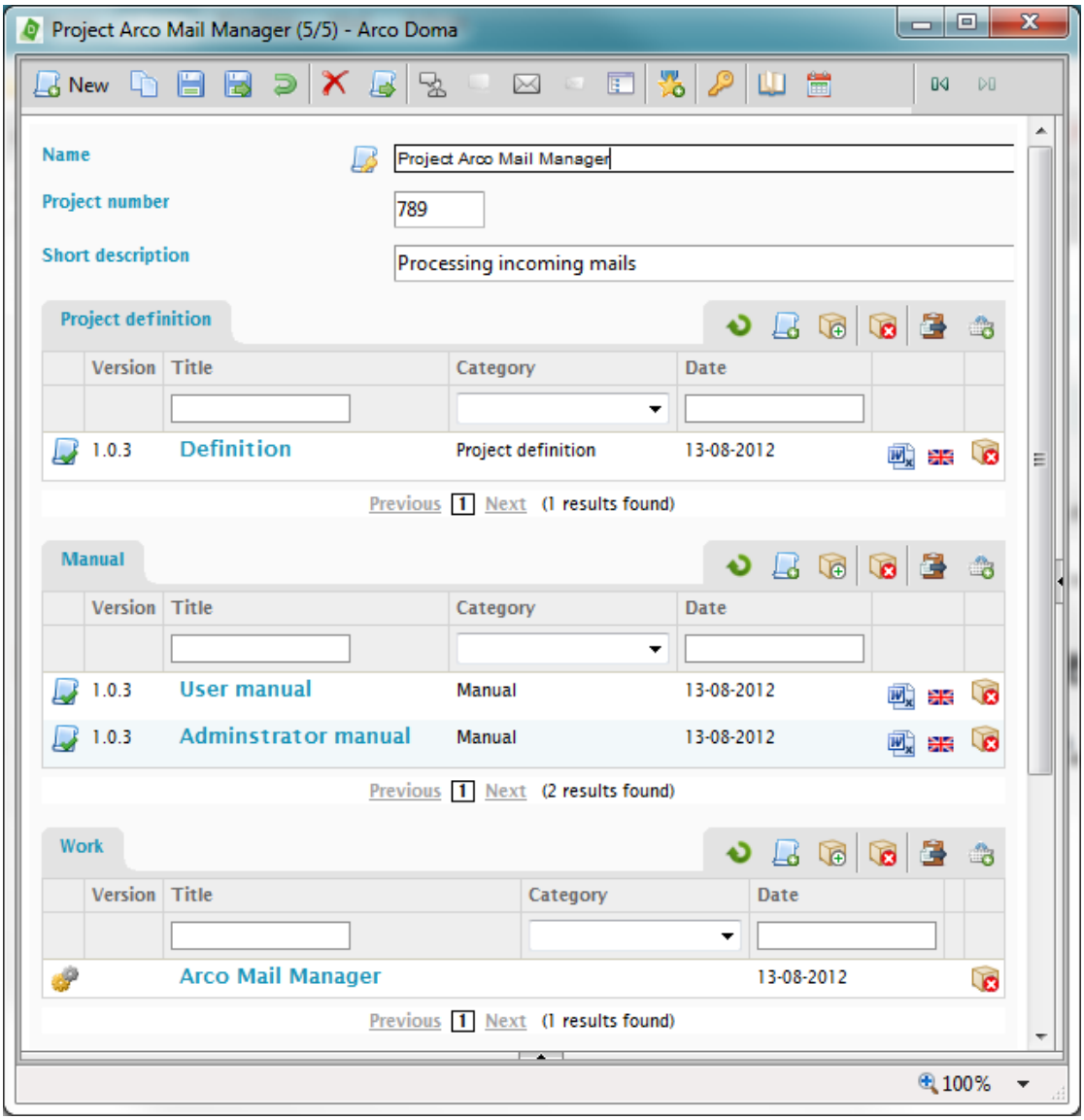


5.4.2 Result in DocRoom Web

Login as Admin.

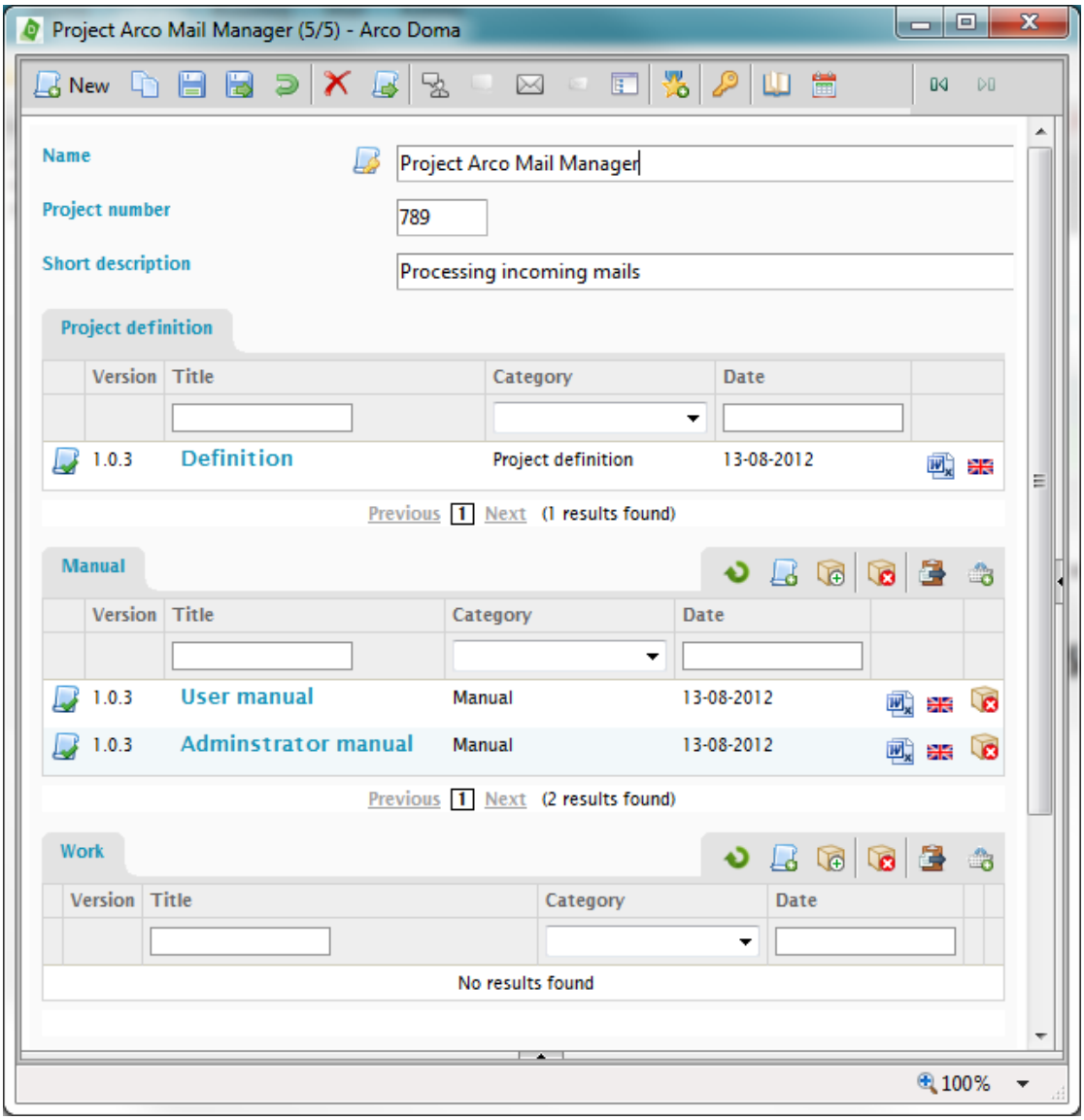
Follow the steps described in chapter 5.1.2.

Admin



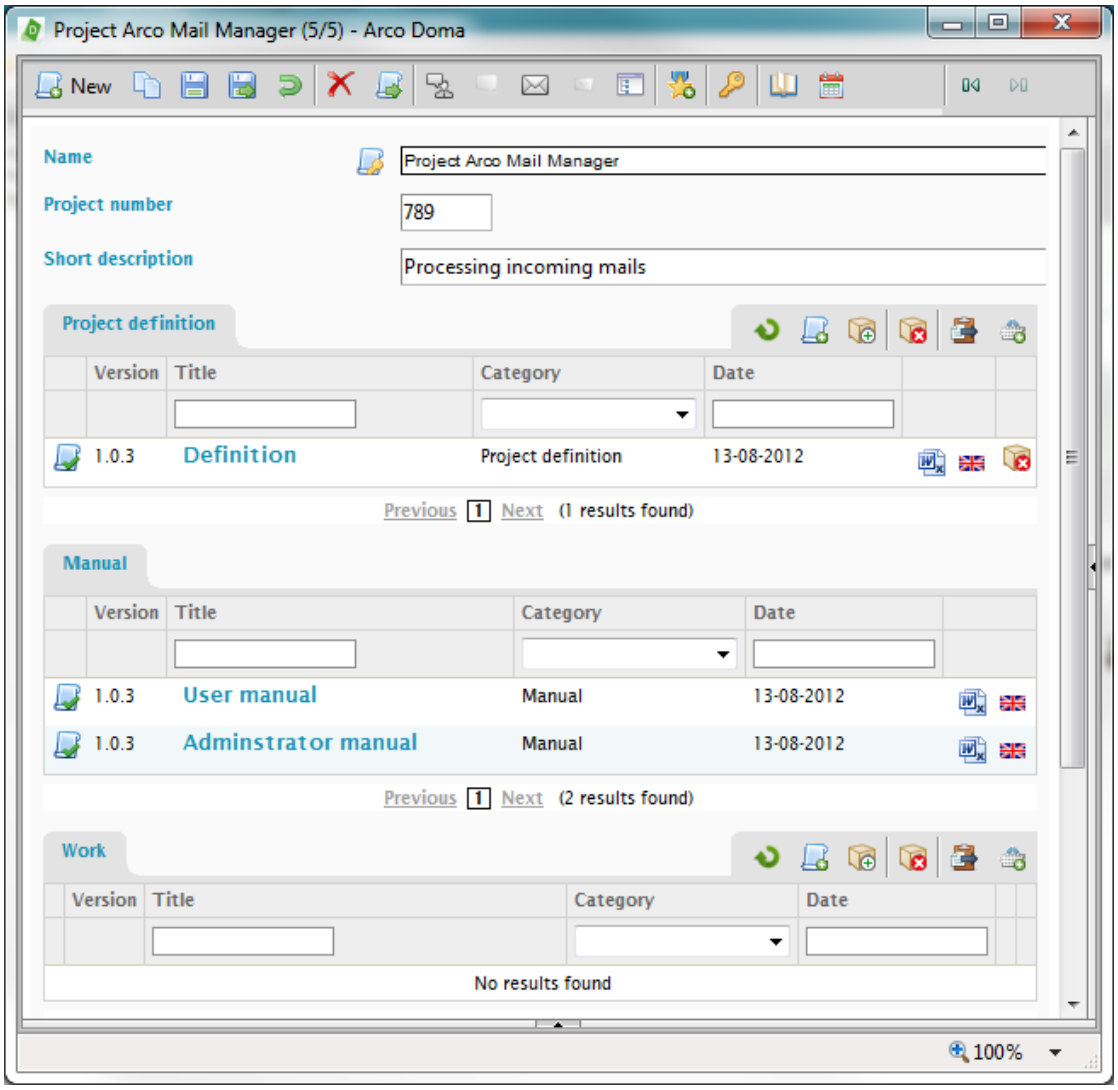
User1

Login as User1



User2

Login as User2


Project Arco Mail Manager (5/5) - Arco Doma
New
Name
Project Arco Mail Manager
Project number
789
Short description
Processing incoming mails
Project definition
Version
Title
Category
Date
1.0.3
Definition
Project definition
13-08-2012
Previous 1 Next (1 results found)
Manual
Version
Title
Category
Date
1.0.3
User manual
Manual
13-08-2012
1.0.3
Adminstrator manual
Manual
13-08-2012
Previous 1 Next (2 results found)
Work
Version
Title
Category
Date
No results found
100%