Arco

Training Guide For DocRoom Application Administrators

A new era in document management.

Doma 6

Arco Training

Training Guide for DocRoom Application Administrators

Document reference: 137514

Author: Arco Training Dept. - Kris Steenackers

Manual Modification Follow-Up

Ref.	Date	Author	Modification description	Affected paragraphs
1	01/12/2010	Kris Steenackers	Manual creation	
137514	15/06/2011	Kris Steenackers	Manual update	

The digital version of this document is available on www.docroom.net.
If you do not have an account for this website, please send an e-mail to training@arco.be or info@arco.be to recieve your login.

Arco carefully monitors the quality of its products and the associated manuals.
If you have comments regarding this guide, please send them to training@arco.be.
Thank you for your cooperation

Contents

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

1 Introduction

What you will learn

In this chapter you will:

- Learn how to use this training guide

Omega Business Park
Wayenborgstraat 24 – B-2800 Mechelen
www.arco.be
info@arco.be
t +32 (0)15 289 030
f +32 (0)15 289 031

1.1 Welcome!

Welcome to the DocRoom Application Administrator training. This training is a part of the Arco Open training Sessions.

During this course you will learn how to administer the DocRoom Application.

As an extension on this training, Arco presents the DocRoom Advanced Application Administrator course.
In this course, you learn how to configure the DocRoom website, change the look and feel of it. You will also get an introduction in how to configure the DRUM module. (File upload or database upload configuration)

1.2 Course goal

After completing this course, you will be able to administer the DocRoom application:

You will be able to:
- Create and configure Folder Categories.
- Create and configure Document Categories.
- Create and configure Pool properties, Folder Category properties and Document Category properties.
- Do the user administration:
  - Create/edit/delete database users.
  - Create/edit/delete/roles.
  - Synchronize users & groups form a network.
- Create/edit/delete action profiles.
- Set security on folder and / or document level
- Interpret the batch job overview.
- Administer which file extensions are allowed into the system.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

2 Properties

2.1 Introduction

2.2 Pool Properties

2.3 Folder category properties

2.4 Document category properties

3 Categories

3.1 Introduction

3.2 Document Category

3.3 Folder Category

3.4 Case Category

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

4 User Management

What you will learn

In this chapter you will:

- Create/edit/delete database users using the web interface.
- Create/edit/delete database users using the Routing Users Manager.
- Create/edit/delete/roles using the web interface.
- Create/edit/delete/roles using the Routing Users Manager.
- Synchronize users & groups form a network (Routing Users Manager).

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

4.1 Introduction

The Routing user management can be done from 2 places:

1. From the WebInterface, via the menu item Admin/User admin.

2. From the Doma Admin module, a client-server application that is always installed on the server and that can be installed on your local PC.

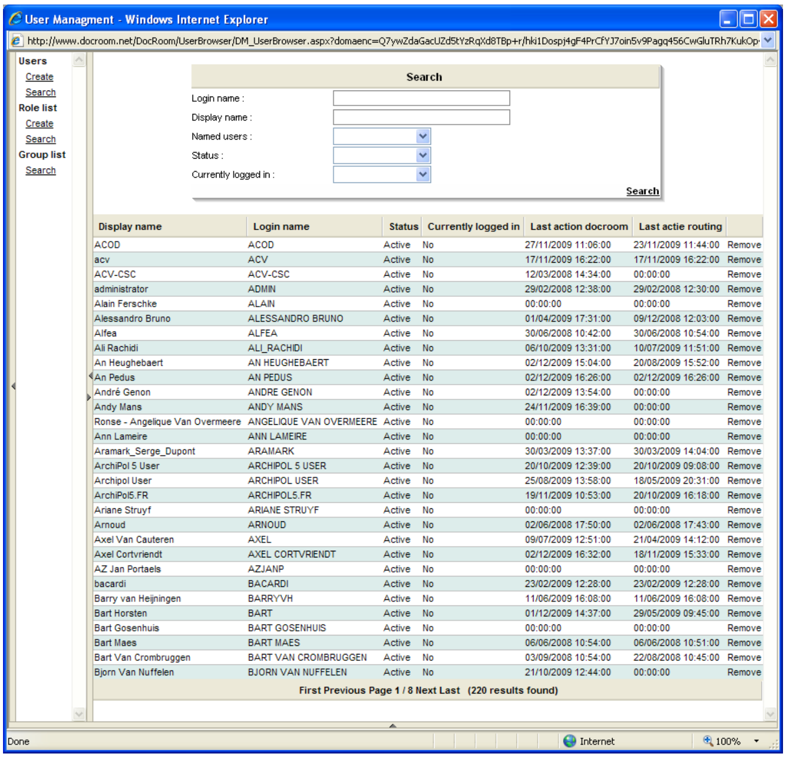
There are 2 kinds of users: users synchronized from the network or database users.

1. Synchronized users are automatically recognized by the system, based on their windows login. They don't have to enter a user name and password to login to the DocRoom webinterface.

2. Database users are created manually by the DocRoom administrator. When the user starts the DocRoom WebInterface, he/she has to log in manually.

4.2 User management via the WebInterface

When you select the option **Admin \ User admin**, the next window will appear:



This window allows you to:

- Create/edit/delete database users.
- Create/edit/delete roles.
- Search users.
- Search roles and visualize their members.
- Search groups and see their members.

4.2.1 Exercise: create a database user

a. Open the DocRoom Web Interface.

b. Select the menu **Admin** in the **menu bar**, then select the option **User Management**.

c. A new window pops up. This window allows you to view users, groups and roles, to search on these items and to add database users and roles.

d. Click on the option **Create** in the **Users** part in the left pane of the window.

e. The window **Create new user** appears. Fields of which the name is rendered in bold are mandatory.

f. Enter the next data for your new user:
   i. **Login name**: DBstudent[your number]
   ii. **Display name**: DBStudent[your number]
   iii. **Password**: DBStudent[your number]
   iv. **Language**: Select a language.

g. Click on the **Save** option in the right lower corner of the screen.

h. When saved, you can edit the role list on the bottom of the page. Here you can define of which roles the user must be part of – Click on the option **Edit Roles** next to this field.

i. A new window pops up. By default, only the role Everyone is shown. The filter field allows you to filter on a value in the name. If you enter without adding a value in this field, all roles will be shown. Enter the value **DB** in the field and press [Enter].

j. The role **DBstudents** appears in the list. Click on it. It now appears in the selection list in the left pane. Your user is now part of the role DBstudents. Click on the **Back** option in the lower right corner of the window.

k. A warning message “*The webpage your are viewing is trying to close the window. Do you want to close this window?*”. Confirm by clicking on the **Yes** button.

l. Save your changes in the detail window of the user and close the window.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

4.2.2 Exercise – Create a role

a. Open the DocRoom Web Interface.

b. Select the menu **Admin** in the **menu bar**, then select the option **User Management**.

c. A new window pops up. This window allows you to view users, groups and roles, to search on these items and to add database users and roles.

d. Click on the option **Create** in the **Roles** part in the left pane of the window.

e. The window **Create new role** appears. Only the field Role name (rendered in bold) is mandatory.

f. Enter the next name for your new role: **Role Student [your number]**.

g. Click on the **Save** option in the right lower corner of the screen.

h. When saved, the message “Saved successfully” and the option **Edit membership** appear in the screen.

i. Click on the option **Edit membership** to define the members of the role.

j. A new window opens. In this window, you can select the users that will be part of your group.
At start, no users are shown. Select **Education** in the dropdown list **Domains** and enter the word **student** in the field *Filter*. Then press [**Enter**] or click on **refresh**.

k. The list of users containing the word *student* that are part of the domain *Education* now appears in the right pane.

l. Click on a user to select the user in your role. You will see that the user will appear in the left pane. The users in the left pane are the users selected in your role. Select all students and add the trainer.

m. Next to the selected users, you see the delete icon . Click on the delete icon next to the trainer to remove this user from the role. The user will be removed without a warning.

n. Click on **Back** in the right lower corner of the window to close the window and return to the role detail. A message “*The webpage you are viewing is trying to close the window. Do you want to close the window?*” appears. Click **Yes**.

o. Close the role detail window.

4.2.3 Exercise: create a user in the Routing User Manager module

a. Open the Routing User Manager module.

b. Click on the **New icon** in the toolbar or select **File/new** in the menu bar.

c. An empty detail window appears. Enter the necessary data for this user. (Login name, display name, password, E-mail, language)

d. Click on the **Save icon** in the toolbar.

e. The message "The user was created successfully" appears. Click on the **OK** button to close the message window.

f. The user is now created and available to use.

4.2.4 Synchronize network users

See demo trainer.

4.2.5 Create role user in the Routing User Manager module

See demo trainer.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

5 Action Profiles

What you will learn

In this chapter you will learn:

- The action profile definition.
- About all security settings of an action profile.
- How to create an action profile.
- How to edit an action profile.
- How to delete and action profile.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

5.1 Definition

Action profiles are pre-defined security settings that can be linked to a user, a group or a role on folder and/or on document level.

An Action Profile consists of a list of settings.

Each Action Profile is linked to one or more users, groups and/or roles on folder or document level.

With a standard installation, Arco will install three pre-defined Action Profiles:

- Read
- Write
- Full Control

Overview of the Action Profile settings of the Web Interface.

Action	Description - The user is allowed to
Add Comments	Add comments to a document.
Add File	Add a file to a document of the folder.
Check-In other users documents	Make documents that are reserved for editing by another user available again for edition to all users.
Configure Application	• Create Action Profiles. • View, execute and enable/disable batch jobs. • Manage the file extensions list. • Manage the file servers list. • Manage the Ifilters list. • Organize the toolbar. • Execute a batch update of documents. • Use the Template Builder. ***Remark***: *Configure Application rights are only checked on the root level of the DocRoom tree.*
Create Document	Add a new document to the current folder.
Create Shortcut	Create a shortcut to another document or folder.
Create Subfolder	Create a subfolder in the current folder.
Create new document version	Create a new version of the document.

Add Comments	Add comments to a document.
Add File	Add a file to a document of the folder.
Check-In other users documents	Make documents that are reserved for editing by another user available again for edition to all users.
Configure Application	• Create Action Profiles. • View, execute and enable/disable batch jobs. • Manage the file extensions list. • Manage the file servers list. • Manage the Ifilters list. • Organize the toolbar. • Execute a batch update of documents. • Use the Template Builder. ***Remark**: Configure Application rights are only checked on the root level of the DocRoom tree.*
Create Document	Add a new document to the current folder.
Create Shortcut	Create a shortcut to another document or folder.
Create Subfolder	Create a subfolder in the current folder.
Create new document version	Create a new version of the document.
Create new file version	Create a new version of a file linked to a document in the folder.
Delete Comments	Delete comments (added by your user only).
Delete Document	Delete the selected document.
Delete File	Delete a file linked to a document.
Delete Folder	Delete the selected folder. A warning message ***Are you sure you want to delete this folder?*** will appear. If you confirm, the folder and it's content will be deleted..
Execute Custom Action	Execute a custom action from the menu ***File/actions***. *Custom actions are defined on database level.*
Full Control	Do all actions mentioned in this list.

Modify ACL Document	Change the security settings of a document.
Modify ACL Folder	Change the security settings of a folder.
Modify Checked out files	Edit files that are checked out. After changes, the user can save the edited file as a new version of the old one. If not selected, the user cannot modify checked out files.
Modify Comments	Change comments (added by your user only).
Modify Files	Edit files without version management (the option ***Edit*** appears and allows you to change the file immediately without check-out. The old file will be overwritten by the new one. The new file will get a new revision number (x.x.1will become x.x.2). The old file cannot be viewed anymore.
Modify Meta Data Checked Out Document	Edit the search criteria of the checked-out document. After changes, the user can save the edited document as a new version of the old one. If not selected, the user cannot modify meta data of a checked-out document.
Modify Meta Data Document	Edit document search criteria without version management (the option ***Edit*** appears and allows you to change the document meta data immediately without check-out. The old information will be overwritten by the new one. The new information will get a new revision number (x.x.1will become x.x.2).
Modify Meta Data Folder	Change folder search criteria.
Start Worklfow	Start a workflow procedure.
Unlock Other users Documents	Make documents, that are locked for editing by another user, available again for edition to all users.
View ACL Document	View the security settings of the document.
View ACL Folder	View the security settings of the folder.
View Comments	View the comments of the document/folder.
View Document History	View the actions made on the document.
View File History	View the actions made on the file linked to a document.

View Files	View files that are linked to a document.
View Meta Data Document	View the search keys of a document.
View Meta Data Folder	View the search keys of a folder.
View previous document versions	View earlier versions of the document.
View previous file versions	View earlier versions of a file linked to a document.

5.2 Definition

Security ensures that data stored in DocRoom cannot be read or compromised by any individuals without authorization.

DocRoom security is based on the user's login and password and the groups and roles a user makes part of.

Security is defined in separate actions. All of these actions are gathered in an Action Profile.

This Action Profile is linked to users, groups or roles on document or on folder level.

5.3 Main rules

The default way of working is to put security on folder level.

Subfolders or documents that are added to the folder, will inherit the security settings of the folder.

Mind! *Also when you change the security settings of a folder in a later stadium, all subfolders will inherit the new security settings.*

By overriding the security of a folder or a document, you can create security settings that deviate from the folder security of the folder where they are located.

When an override has been done, you have changed the inherited folder security into an 'own security' of the folder or the document.
When such a folder or document is moved to another folder, it keeps its 'own' security settings.

5.4 The Security Window

Screenshot of the security window + explanation

Explanation of different possibilities of override, take parent ACL and override subfolders

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

Exercises

Exercise 1: change the folder security of your student folder.
Exercise 1b: give no access: see what happens.
Exercise 1c: delete the users with no action: what happens now?
Exercise 1d: combine 2 action profiles: what is the result?
Exercise 2: copy folder structure under your student folder: first check initial folder security settings, copy, check security of copied folders: what do you see?
Exercise 3: add document to your folder. What do you notice concerning security settings?
Exercise 4: copy a document to your folder. What do you notice concerning security settings?
Exercise 5: change your security on doclevel. Then change your security on folder level. Check security of a doc without changed security
Exercise 6: add user: document owner with special security rights: what happens?
Exercise 7: assign security to a role that contains an assignee (of hoe doen we dat?) -> wat kan? Wanneer toegepast?

Nice to know

- If no Action Profile is defined for a user, the user will get *No Access*.
- When more than one Action Profile is assigned to the same user, the user will gain all security rights mentioned in the different Action Profiles.
- If a user has *No Access* on a folder, the folder will not be shown to the user in the Tree Structure.
- If a user has access to a subfolder of a folder where he/she has no access, both folders will be shown in the Tree Structure. The content of the folder of which the user has no access will not be shown.
- When a document is moved to another folder, it will inherit the security of the target folder, except if the document had 'own' security settings, i.e. when the document security settings are different from the security settings of the folder where it is located.
- Document security settings override folder security settings (inherited on document level) when document security is set after the document has been located in the folder.

5.5 Other security settings

Security on custom screens
Security on saved queries
Security on property expansions

6 Batch Jobs

What you will learn

In this chapter you will learn about:

- What Batch jobs are/how they work.
- The meaning of the different batch jobs.
- The different statuses of a batch job.
- Batch job options.

Omega Business Park
Wayenborgstraat 24 – B-2800 Mechelen
www.arco.be
info@arco.be
t +32 (0)15 289 030
f +32 (0)15 289 031

6.1 Introduction

This section gives an overview of all processes that run in the background of the system.

Via this option the administrator can check the different processes, the last date and hour of execution and the next date and hour of execution. The administrator can also check the logs and execute or disable the different processes.

6.2 Description of the batch jobs

Validate indexes

CollectFilesForEditing

Expire Objects

Resend Error Messages

CollectFilesPreparedForIndexing

Send Subscriptions

CollectFilesPreparedForReIndexing

Calculate Object Content

Send Files To OCR

Collect Files From OCR

Analyse Oracle Indexes

Run Oracle fulltext synchro

Update counters

6.3 Status

Idle

6.4 Options

Details
Execute
Disable
Log

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

7 File extensions

What you will learn

In this chapter you will:

- Learn how to add a new file extension.
- How to define an extension.

Omega Business Park
Wayenborgstraat 24 – B-2800 Mechelen
www.arco.be
info@arco.be
t +32 (0)15 289 030
f +32 (0)15 289 031

7.1 Introduction

Here you can change and add the settings of the allowed file extensions. You can determine which actions can be done with which file extension by checking the checkboxes.

Fill in a new name in the New extension-field and click Create to add a File extension. The new extension will appear in the list. Click on Edit to change the settings, click on Delete to remove the file extension.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

8 File Servers

What you will learn

In this chapter you will:

- Learn that DocRoom is designed to run on different servers.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

8.1 Introduction

This gives you the File server settings which can and must only be changed by an administrator.

Omega Business Park www.arco.be t +32 (0)15 289 030
Wayenborgstraat 24 – B-2800 Mechelen info@arco.be f +32 (0)15 289 031

Omega Business Park
Wayenborgstraat 24 – B-2800 Mechelen
www.arco.be
info@arco.be
t +32 (0)15 289 030
f +32 (0)15 289 031