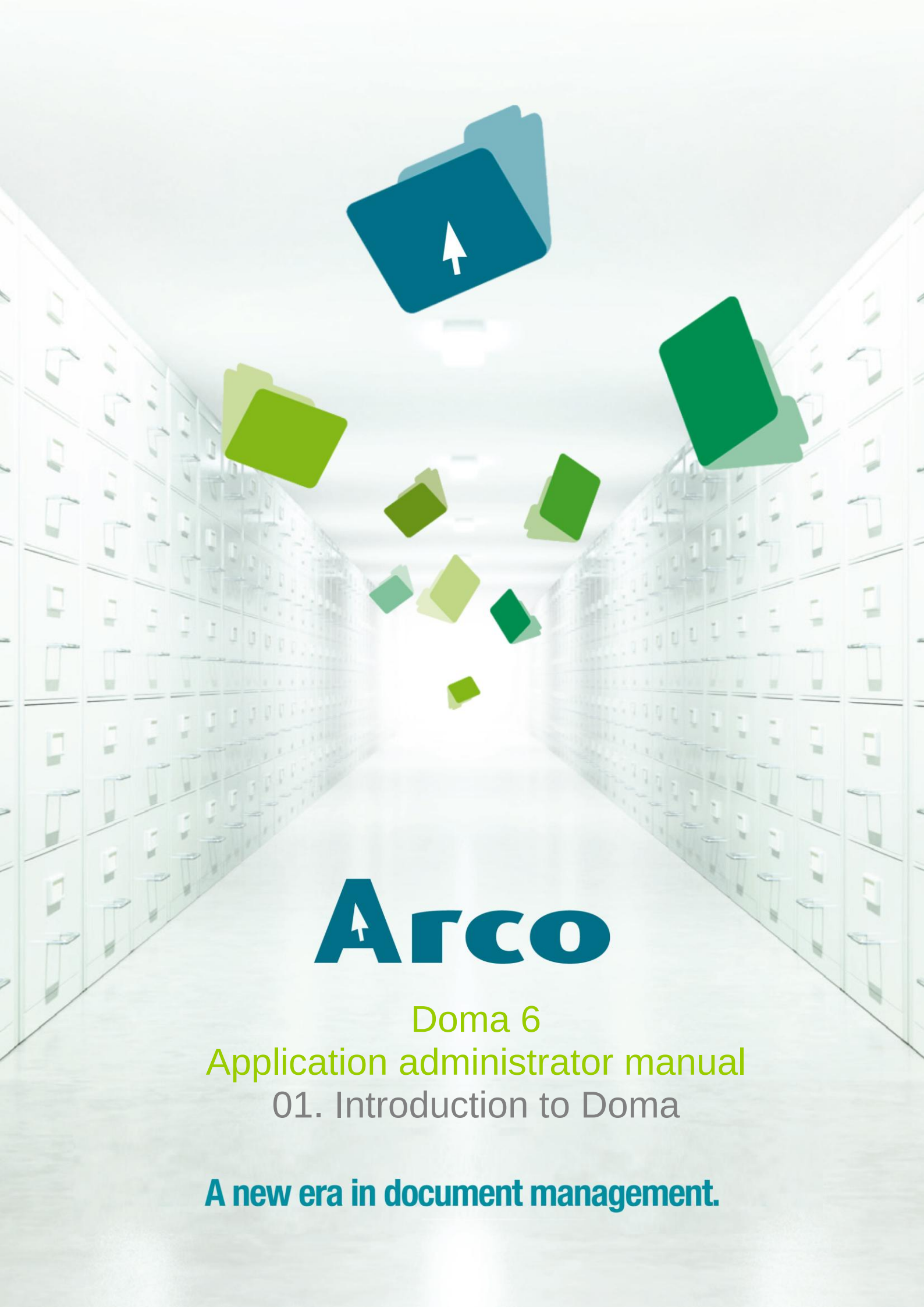

Arco

Doma 6
Application administrator manual
01. Introduction to Doma

A new era in document management.

Doma 6

Application administrator manual

01. Introduction to Doma

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1 Introduction

The Arco Doma Suite combines DocRoom, a document management system, and Routing, a workflow system in one .

Both DocRoom and Routing use:

- The same database.
- The same user interface, which can be accessed via abrowser (one URL to access both tools)
- A common administrator tool, called the Doma admin module.

The Doma suite is also used as the core of vertical solutions, such as:

- Arco Invoice
- ArchiPol
- ArchiPol+
- Arco Mail Manager
- …

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1.1 Arco DocRoom

DocRoom is Arco's document management system: it is a computer system used to track and store electronic documents and/or images of paper documents, providing storage, versioning, metadata, security, as well as indexing and retrieval capabilities.

What is document management?

Document management is the **process** of **managing documents** and other types of information such as images from creation, review, storage to its dissemination.
It also involves the indexing, storage and retrieval of documents in an organized method.

To be able to do document management, we use a document management system, often combined and integrated with other electronic systems. (e.g. workflow, ERP, …)

As mentioned above, document management involves:

Storage
Store the electronic documents. Storage of the documents often includes management of those same documents; where they are stored, for how long, migration of the documents from one storage media to another (Hierarchical storage management) and eventual document destruction.

Versioning
Versioning is the process of assigning either unique version names or unique version numbers to unique states of documents. Different versions can be kept in the system, with the actual version available in one click.

Metadata
Metadata is typically stored for each document. Metadata may, for example, include the date the document was stored and the identity of the user storing it. The DMS may also extract metadata from the document automatically or prompt the user to add metadata.

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

Indexing
Track electronic documents. Indexing may be as simple as keeping track of unique document identifiers; but often it takes a more complex form, providing classification through the documents' metadata or even through word indexes extracted from the documents' contents. Indexing exists mainly to support retrieval. One area of critical importance for rapid retrieval is the creation of an index topology.

Retrieval
Retrieve the electronic documents from the storage. Although the notion of retrieving a particular document is simple, retrieval in the electronic context can be quite complex and powerful. Simple retrieval of individual documents can be supported by allowing the user to specify the unique document identifier, and having the system use the basic index (or a non-indexed query on its data store) to retrieve the document. More flexible retrieval allows the user to specify partial search terms involving the document identifier and/or parts of the expected metadata. This would typically return a list of documents which match the user's search terms. Some systems provide the capability to specify a Boolean expression containing multiple keywords or example phrases expected to exist within the documents' contents. The retrieval for this kind of query may be supported by previously-built indexes, or may perform more time-consuming searches through the documents' contents to return a list of potentially relevant documents.

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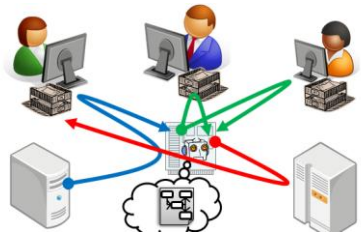
1.2 Arco Routing

Routing is Arco's workflow management system: it is a computer system used to create, execute and follow-up workflow procedures.

What is workflow?



Workflow is the automation of a business process, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

Workflows are created in a workflow management system, i.e. a system that defines, creates and manages the execution of workflows through the use of software, running on one or more workflow engines, which is able to interpret the process definition, interact with workflow participants and, where required, invoke the use of IT tools and applications.

In a workflow an object has to follow a predefined route (flow). A predefined route is called a ***Procedure.*** A procedure is built out of several **steps**. Each step represents a certain moment in the procedure.

- *A **procedure** is not a DocRoom object, which means that a procedure case will not automatically be stored in DocRoom when it's not active anymore.*

- A *Procedure* has its own
  - ***Properties*** (fields)
  - ***Packages*** *(document placeholder)*

Arco Routing can be used for

- **Document oriented workflow**
  - Create/update/delete a document by using a workflow
  - Document retrievable in DocRoom from procedure start
  - Document runs through a procedure before being published as a document

- **Process oriented workflow -** *Define your business process in Routing*
  - Automization of certain steps
  - Easy follow-up using workflow search screens
  - Reporting using external reporting tools

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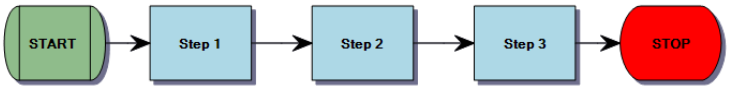
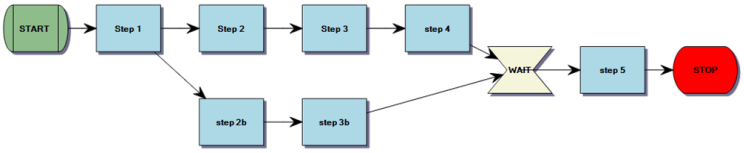
1.2.1 Procedure design

1. Sequential flow



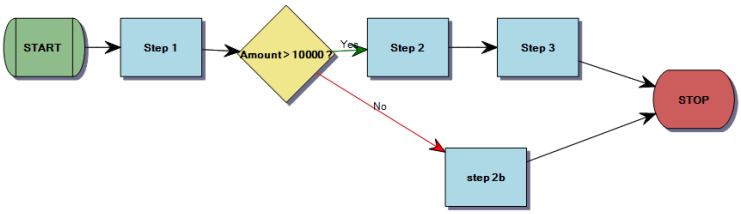
The most straight-forward way of building a procedure: go from the first step to the second, to the third, etc.

2. Parallel flow



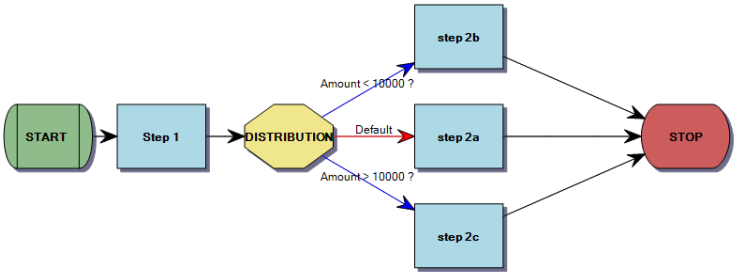
A parallel flow starts from one step, but then splits at a certain moment into 2 or more branches. The different branches are run separately, though they can re-unite if necessary. If they re-unite, a wait step assures that all data of all branches are gathered before the flow will continue.

3. Conditional branching



Conditional branching allows you to go either one way or the other with the procedure. Based upon a Boolean condition (yes/no), you will continue the flow in the selected direction.

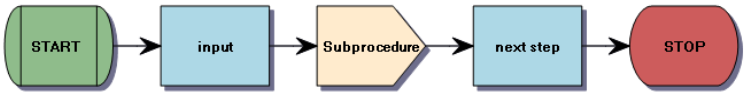
4. Distribution



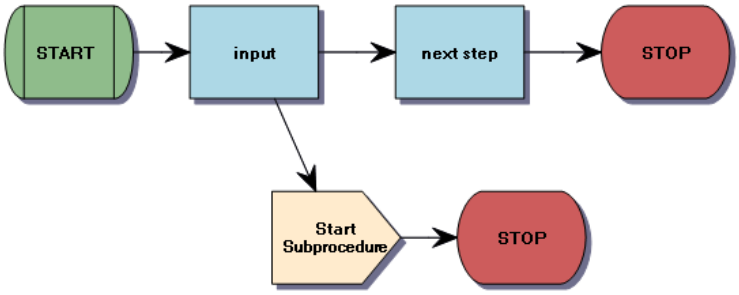
Often, conditional branching is not enough: e.g. what if more than 2 options can be chosen to continue. Or possibly the condition must continue in several directions. For this purpose you can use the distribution step. The condition is no longer Boolean,

and it is located on the arrow that leaves the distribution step to guarantee maximum flexibility.

5. Subprocedures



A subprocedure can be started from within a procedure. This sub procedure can be a part of the complete procedure, as shown in the above example. The step Subprocedure will start the subprocedure, which runs through the complete sub procedure before it returns to the next step of the main procedure.



A sub procedure step can also trigger (start) a subprocedure, which then will proceed as an individual procedure. When the sub procedure has been started, the main procedure will immediately cvontinue to the next step of the procedure.

6. Automation

Certain steps, in which user interaction is not necessary, can also be automated. Automatic steps allow automated connections with other software products, e.g. for exchange of data, automatic generation of a letter, based upon pre-defined temples, etc.

2 Glossary

Case/Dossier	*Used in: Routing*
Instance of a procedure, i.e. each time we start a procedure, we create a new dossier. Technically always referred to as a case.	

Case category
Used in: DocRoom and Routing
A case category is a DocRoom object, but a Routing procedure is also linked to it. It can be considered as a dossier that contains links to other Routing workflow dossiers and to documents or folders.
Case categories always will end as an item in the DocRoom database. All process data can be visualized from the entrance in DocRoom.

Case category item
Used in: DocRoom and Routing
Dossier, item that is retrievable in DocRoom and Routing.

Category
Used in: DocRoom and Routing
DocRoom object. Depending upon the kind of category, it has different properties and possibilities.

Document
Used in: DocRoom
Documents are the result of the creation of an item of a document category.
A document is the combination of properties and one or more files. It can also be a bundle of properties without a linked file.

Document Category
Used in: DocRoom
A document category is a specific document type, e.g. “invoice”, “PO”, etc.
Document categories allow us to search on the different categories and allow us to link specific properties to the different document types.
Next to this, also specific screens and actions can be linked to document categories.

Document Management
Used in: DocRoom
The **process** of **managing documents** and other types of information such as images from creation, review, storage to its dissemination.
It also involves the indexing, storage and retrieval of documents in an organized method.

Dossier/Case
Used in: Routing
Instance of a procedure, i.e. each time we start a procedure, we create a new dossier. Technically always referred to as a case.

Folder
Used in: DocRoom
Document and case category item. Part of an hierarchical tree in which your items are ordered. Also very important for security.

Folder Category
Used in: DocRoom
A folder category is a specific folder type, e.g. “personnel folder”, “customer folder”, etc.
Folder categories allow us to search on the different categories.

Each folder category can have its specific properties and can have a different icon in the tree structure.
It is also possible to link specific insert, update, search and result screens to a folder category.

Package
Used in: DocRoom and Routing
Routing placeholder. It contains files, links to DocRoom documents or links to other Routing cases. Routing placeholders can be defined in a procedure.

Procedure
Used in: Routing
A procedure is an automation of a business process, in whole or in part, where documents, information, or tasks are passed from one participant to another for action, according to a set of rules.
Related to a procedure is a case category, which is technically almost the same, but has a different functional definition.
Procedures do not end as an item in DocRoom. All process data thus can be found in the routing archive. Therefore, procedures are used for processes that do not have an important end result in the DocRoom web interface.

Property
Used in: DocRoom and Routing
A property is a DocRoom or Routing information carrier: it contains information about the document, folder or case where it is linked to. It allows the user to find the property when he searches on the value that is linked to the document.
Synonyms: metadata, index, search key.

Example:
- For an invoice document, the supplier and amount can be properties.
- For a letter, sender, receiver and subject can be properties.

DocRoom and Routing have different kinds of properties, each have their own specific characteristics:
- Pool properties
- Document category properties
- Folder category properties
- Case category properties
- Procedure properties

Release
Used in: Routing
Action to proceed to the next step of the procedure.

Step
Used in: Routing
Part of a procedure. In a step we define an action and to this action we link the users who will have to execute the action.

Tree structure
Used in: DocRoom
Hierarchical set of folders that allow users to structure the DocRoom data. Also very important for security.
Next to a static folder structure it can contain dynamic folders.

WorkFlow
Used in: DocRoom and Routing
Workflow is the **automation** of a **business process**, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

3 Doma tools

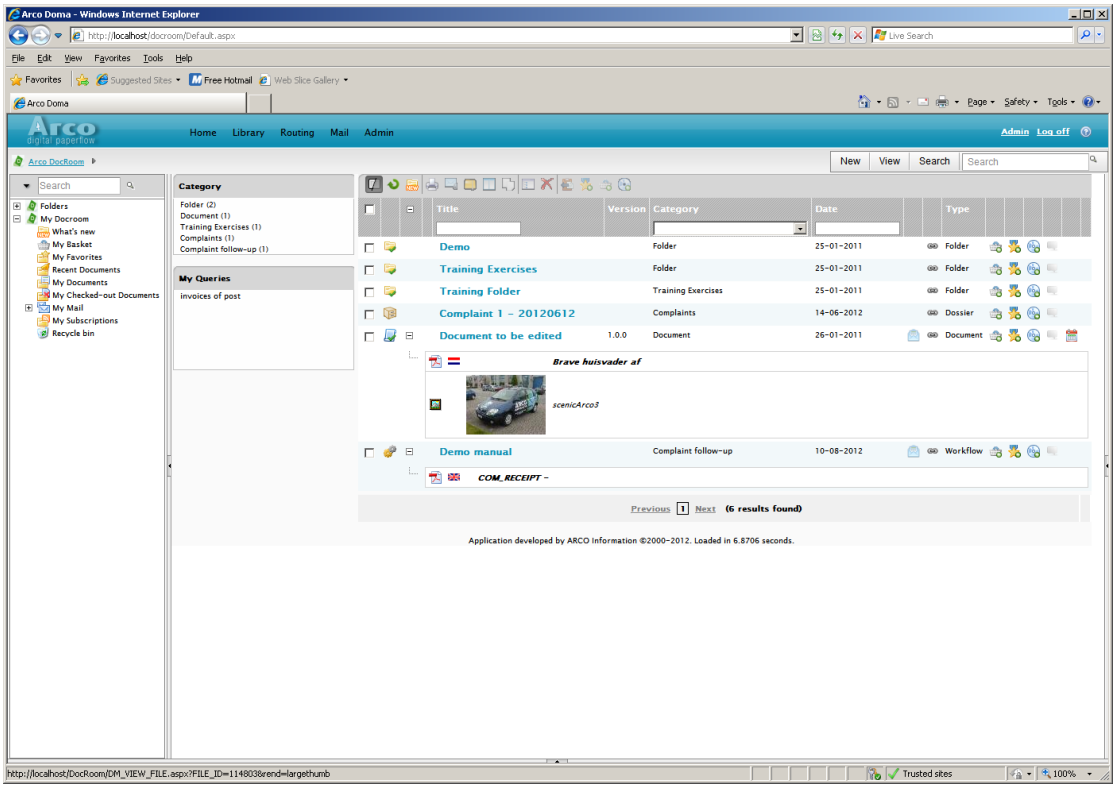
3.1 Webinterface

The Doma WebInterface is the end user interface.

It makes use of a browser and does not require extra installation, thus allowing users to log in from whatever PC in the network of your company or organisation.

Users only need a URL to the system, mostly this is [servername]/docroom.

Depending upon configuration, users will be automatically logged in (based upon their windows password) or they will have to login manually.



From this interface, users can do all possible users actions, provided they have sufficient rights, such as: view/add/edit/delete documents, files, folders, dossiers.
Start a new workflow, follow-up workflows, end workflows, etc.

3.2 Doma admin module

3.2.1 Introduction

The Doma admin module is a client module for the administrator of the Doma application.
It replaces all previous admin tools, such as DocRoom TreeRoom, DocCenter, Routing Builder, Routing Admin module, Routing User Manager, DRUM, etc.

It is installed on the Doma server, but can also be installed on the administrator's PC.

Together with the admin part of the Doma WebInterface, this tool allows the application administrator to configure the Doma application.

When you start the Doma admin module, a *login screen* appears. After login, a *startup screen* containing a *navigation tree* and a *startup page* appears.

The Doma Admin Module is used for:

The configuration of	Monitoring	Settings
• Pool properties • Document categories • Folder categories • Case categories • Procedures • Pool category user events • Pool procedure user events • Document templates • Notification templates • Screens • DRUM Input Connectors • Managed lists • Edit-checks Categories • Edit-checks Procedures • Import • Export	• Audit • Log files • Subscriptions • System log • Reports	• Licence • ArcoInfo parameters • Batch jobs • Category type handlers • Category event handlers • Routing event handlers • Custom actions • Link types • File servers • Rendition servers • File extensions • Workflow priorities • Holidays • Working hours • Mail settings • Locations • Data distribution actions • Document templates settings • DRUM settings • User synchronisation

Remarks:

- **The Doma admin module is installed on your Doma server.**
- **If you want to install the Doma admin module on your own PC, you will have to install it. When Oracle is used as database, you also have to install an Oracle client.**
- **Certain items in the Doma admin module, such as the DRUM configuration and the Template configuration, only function properly on the Doma server.**

3.2.2 Login

How to log in to the Doma admin module.

3.2.2.1 Start the application

- by double clicking on the Doma admin shortcut on your desktop.

- by double clicking on the DomaAmin.exe file, located in D:\Arco\bin\.
- by selecting Start/All Programs/Arco/DocRoom/DomaAdmin.

The Admin module logon window then appears:

This window allows you to logon to different DocRoom/Routing configurations, using windows authentication or password authentication.

3.2.2.2 Select Doma Configuration

This logon window allows you to log on to different DocRoom or Routing environments.

Select the correct configuration by selecting its name in the dropdown box.

With the button New, you can add a new Doma configuration to the logon screen. If you want to add a new Doma configuration, you have to select the Doma config file to enable logon and you have to enter a name for this configuration. The new name will be visualized in the dropdown list.

3.2.2.3 Log in using Windows Authentication

To log in using windows authentication:

- Select the Doma configuration where you want to log in (dropdown list Doma Cinfiguration).
- Select the option Windows Authentication.
- Click on the OK button.

3.2.2.3.1 Log in using password authentication

To log in using password authentication:

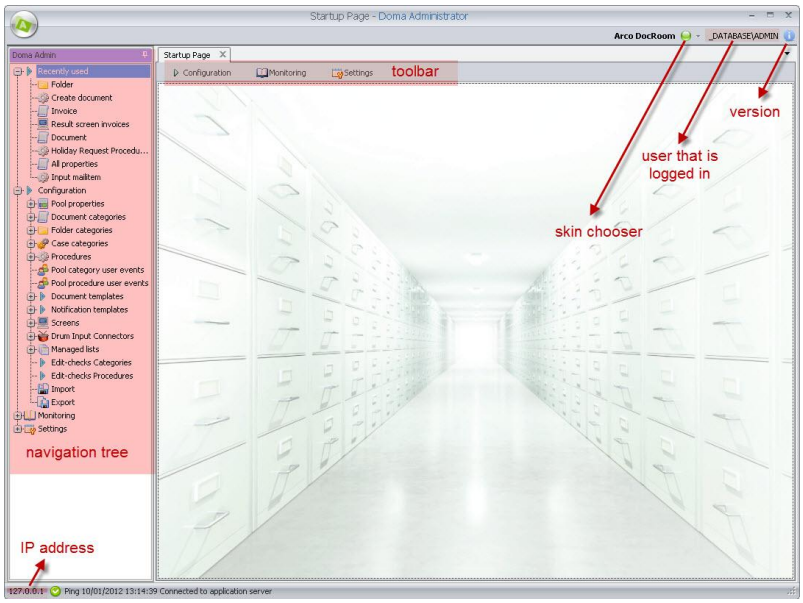
- Select the Doma configuration where you want to log in (dropdown list Doma Configuration).
- Select the option Password Authentication.
- Enter your user name in the field *User Name*.
- Enter your password in the field *Password*.
- Click on the OK button.

After logon, the startup screen appears.

3.2.3 Startup screen

Description of the startup screen of the Doma admin module.

After login, the startup screen appears:



- The ***navigation tree*** allows you to select the item you want to visualize in the detail window at the right.
- Per item that is opened from the navigation tree, a new detail tab will appear.
- The ***toolbar*** shows a list of options linked to the detail tab that is currently visible.
- In the right upper corner you see the **skin chooser** and the **user that is logged in**.
- In the left lower corner the IP address of Doma is shown.

- Double-click on an item in the tree to expand/collapse the item.
- Right-click on an item to visualize the menu from where you can
    - Create a new item (a new detail tab will appear).
    - Open the list of items in a new detail tab.

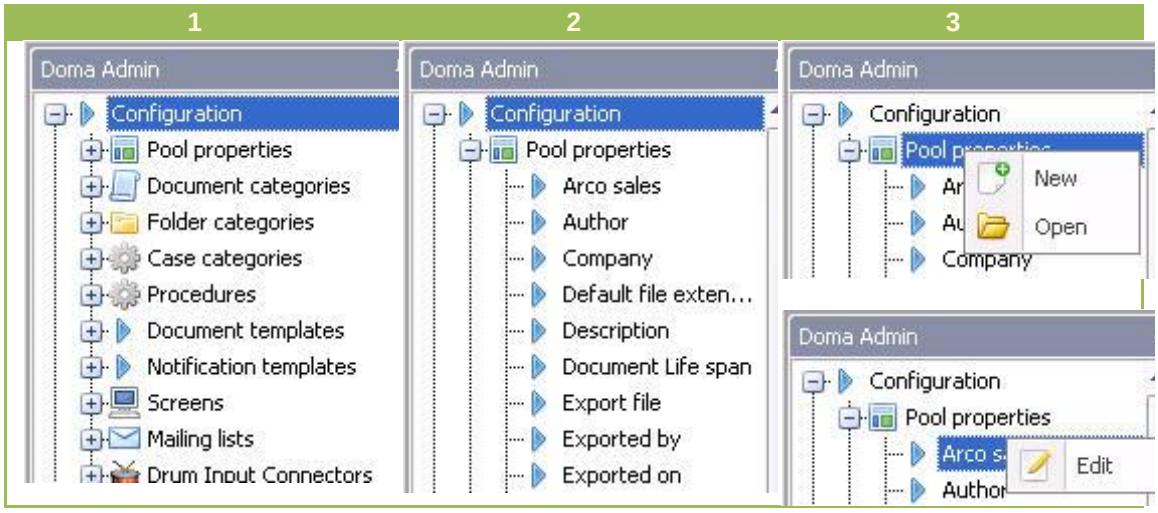
- When started, the **Startup page** appears in the detail window. This page contains a toolbar with the items ***Configuration***, ***Monitoring*** and ***Settings***. These toolbar items allow you to select the same items as those you can select starting from the navigation tree.

3.2.3.1 Navigation tree

Content and use of the navigation tree of the Doma admin module.

The navigation tree shows all admin items in a structured way.

It is divided into 4 main topics:
- Recently used
- Configuration
- Monitoring
- Settings



Double-click on an item in the tree to expand/collapse the item.

1. Double-click on one of these topics or click on the +/- icon in front of it to expand/collapse its sub-items in the tree.
2. Double-click on one of these sub-items or click on the +/- icon in front of it to expand/collapse their sub-items.
3. Right-click on one of the sub-items to show a menu containing options such as *New, Open* and *Refresh;* right-click on one of the items one level lower to show a menu containing the option *Edit*.

3.2.3.2 Toolbar

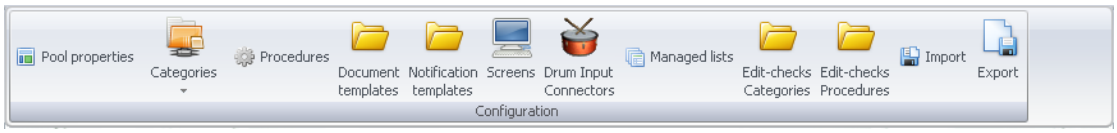
Description of the start page toolbar

The start page toolbar contains the same 3 items that we see in the navigation tree: **Configuration**, **Monitoring** and **Settings**.

When you click on one of the toolbar items, another toolbar appears.
The items of this toolbar are the same as the sub-items in the navigation bar.
Click on one of them to open the detail screen.

3.2.3.2.1 Configuration toolbar

Shows all items of the part *configuration*:

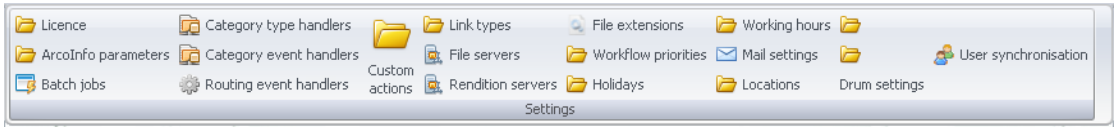


3.2.3.2.2 Monitoring toolbar

Shows all items of the part *monitoring*:

3.2.3.2.3 Settings toolbar

Shows all items of the part *settings*:



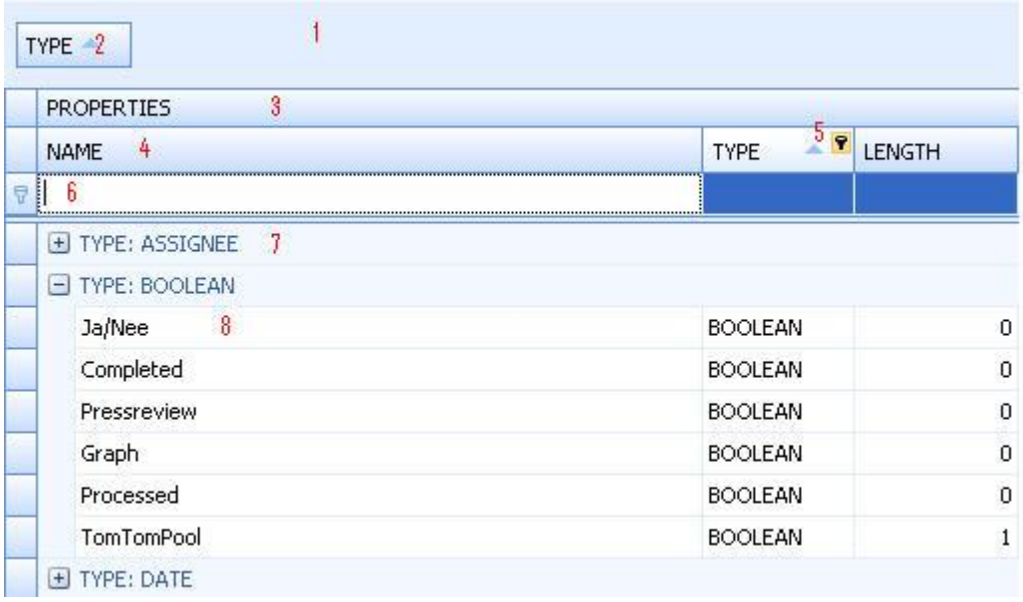
3.2.3.3 Skin chooser

Click on the button ***Paint style*** to select another skin for the Doma admin module.

3.2.3.4 Grids in Doma admin windows

Lots of overview windows in the Doma admin module make use of a grid.
Here we give an overview of the most important things you need to know about these grids.

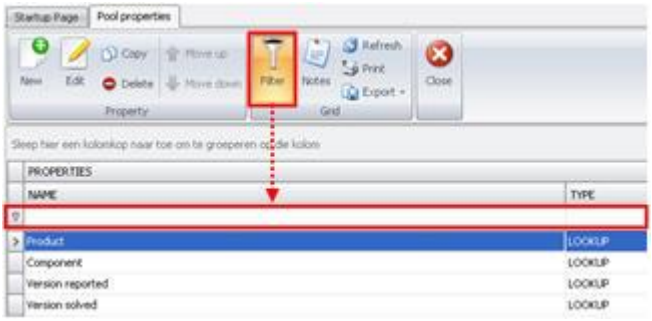
Grid terminology



1 Column header panel
2 Group box
3 Band
4 Column header
5 Column filter
6 Filter field
7 Group item
8 Grid item

Grid filter

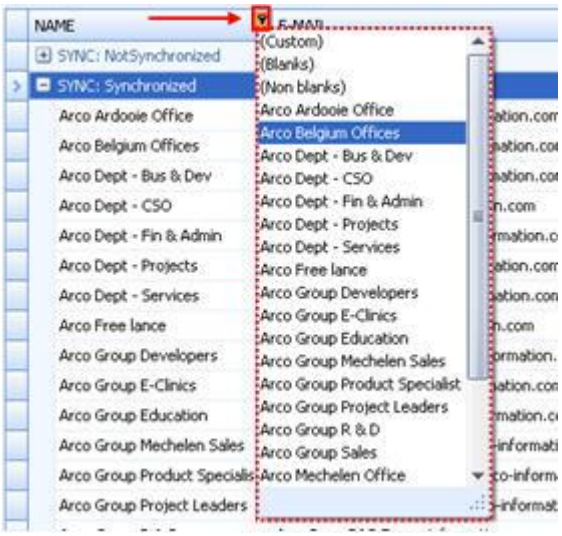
Click on the button Grid Filter in the toolbar to activate the grid filter:



Enter a value in the filter row to filter the list.

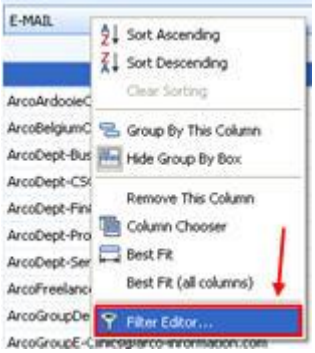
Column filter

Column Filter : Click filter icon in column header:



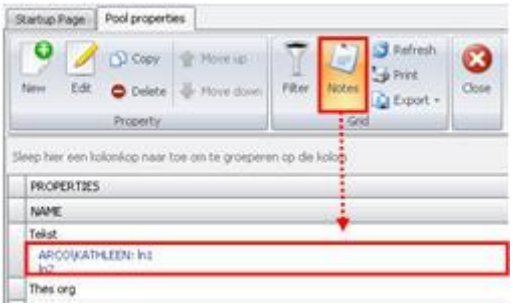
Complex filter

Complex Filter : Right-click on column header, then select *Filter Editor*



Grid notes

Click on the button Notes in the toolbar to visualize the notes in the list:



Grid option: right click on column header panel

Right-click on column header panel shows the next menu:

Grid option: right click on column header

Right-click on column header shows the next menu:

Grid option: right click on group box

Right-click on column header panel shows the next menu:

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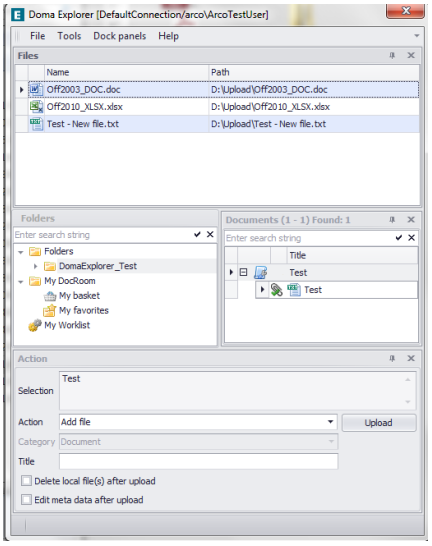
3.3 Doma Explorer

3.3.1 Introduction

DomaExplorer is a part of the Arco Doma suite. This client application permits to easily upload files to existing Doma Documents or Workflows.



The upload is done by simply Drag-and-drop of files from the Windows Explorer to DomaExplorer.

Furthermore, there is integration with the Office suite that permits to upload office-files to Doma with one single click from within the Office suite (Word, Excel, PowerPoint, Outlook, Visio, Project)

3.4 GenCD

3.4.1 Introduction

The DocRoom GenCD module is a client tool that can be used by the administrator.

It allows the administrator to create a read-only version of (a part of) the DocRoom application that can be copied to a CD or a DVD.

In the web interface, users can select DocRoom documents and add them to their personal CD list.
They can always view and edit their personal CD list.

DocRoom administrators can also create a DocRoom CD or DVD based upon folder or query selection.

This module is an extra module and is not included in the default DocRoom application.

3.4.2 Installation

The necessary GenCD components are already installed on the server. The system only has to be configured to use the GenCD in the webinterface.

3.4.3 Configuration

GenCD has to be configured before use.

Configuration is done on 2 levels:

1. In the web interface, certain options have to be visualized to the user (if you want them to be able to select documents and add them to a personal CD/DVD list – this list allows them to ask to create their own DocRoom on CD/DVD).

2. On application level: make sure the configuration file of the GenCD.exe module is configured correctly.

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4 Doma Licence

Doma licences are provided by Arco Information only.

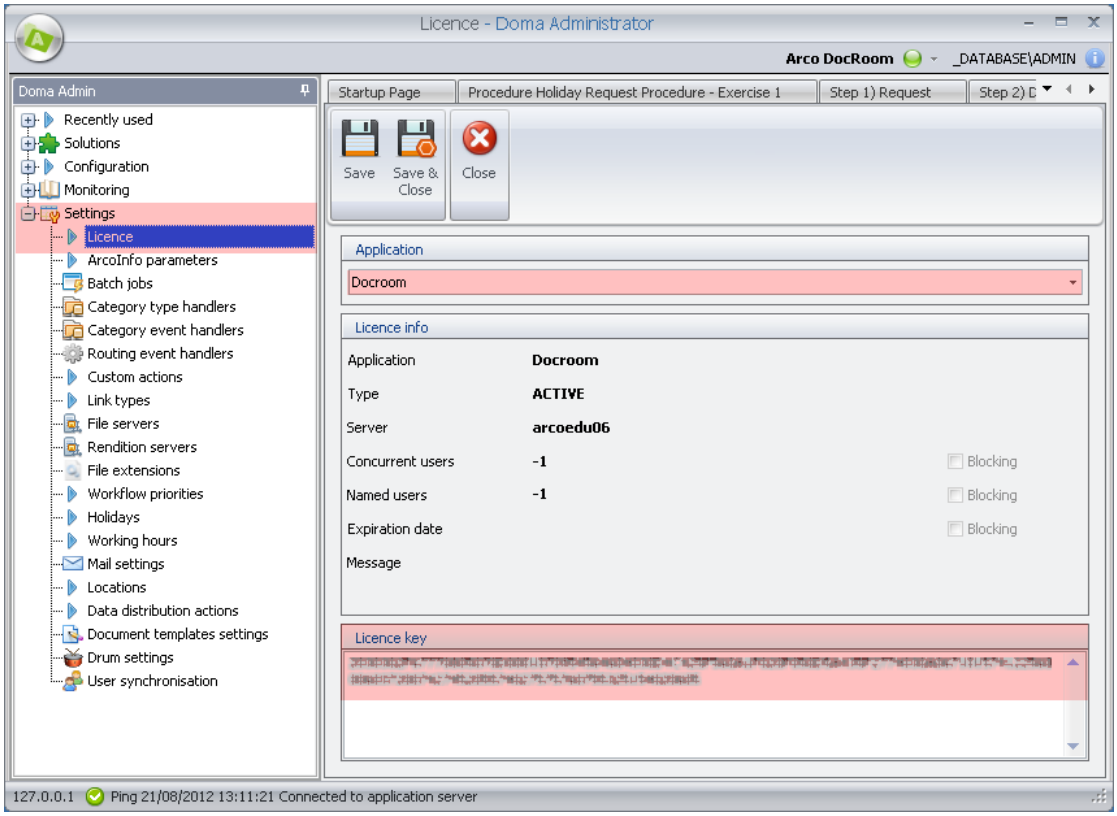
In Doma, we can distinguish 2 licences: the DocRoom licence, allowing you to work with the document management part of the application and the Routing licence, allowing you to work with the workflow part of the application.

Licences can be granted to a number of concurrent users or to named users. The licences can also contain an expiration date.

When using a concurrent users licence, a pre-defined number of users can work on the system at the same time. When the quota has been reached, no others users are allowed into the system.

When using a named users licence, it is pre-defined which users are(e allowed to use the system. Only these users can then access the system.

An application administrator can insert the licence key in the Doma admin module:



5 About files, categories and packages

Doma now allows users to link files in different ways to documents, folders, workflows and dossiers.

The most frequently asked question about the use of files is probably: when do I link a file directly to an object, and when do I use a package?

It is not possible to give a direct answer to that question, but we can make a number of considerations about it:

- When you link a file to a document or a worklfow, it means that the content of the concerned object (i.e. the document or the workflow) changes. The file then only exists in the context of this object.

- In a package, you can link a document (so file and metadata) which then can exist as a linked object everywhere in DocRoom.

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6 Icons used in the Doma WebInterterface

6.1 Icons in the result list of the Webinterface

Overview of the most important icons representing documents, case categories and procedures in the Doma WebInterface result lists.

Workflow category in creation

Workflow category of which the procedure has ended *(Mind: in DocRoom 5 this was the icon for a document in creation when a procedure is used)*

Document in creation (also when a procedure is used to create the document)

Document when created and available for all users (who have sufficient rights)

6.1.1 Document icons

6.1.1.1 Result list icons

Multiselect

Icon	Description
	Selection box. The selection box can be used to select certain items to do an action on them. Actions are available in the result list toolbar.
	Selection box when the document has been selected.

Status

Icon	Description
	Document status: **in Production**. When a document is in Production it means that it is available. The previous version will be available.
	Document status: **Locked**. When a document is Locked it means that another user is editing the document. The previous version will be available.
	Document status: **Checked-out**. When a document has the status Checked-out it means that another user has checked-out the document for editing. The previous version will be available.
	Document status: **In Progress**. When a document has the status in Progress it means that you have checked-out the document.
	Document status: **In Creation**. This means that the document is created but not yet saved by the user who has created the document. The document will only be visible to the user who is creating the document.

Expand

Icon	Description
	All files but the main file are hidden; click on this icon to expand and show the other files of the document.
	All files are shown. Click on this icon to collapse and hide all but the main file.

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Document - linked files

Icon	Description
	File extension of the file: Word or rtf. The file extensions can be configured from the Admin menu.
	This icon indicates a file extension that did not receive a specific icon. The file extensions can be configured from the Admin menu.
	File extension of the file:gif or jpg. The file extensions can be configured from the Admin menu.
	File extension of the file:htm. The file extensions can be configured from the Admin menu.
	File extension of the file:pdf. The file extensions can be configured from the Admin menu.
	File extension of the file:ppt . The file extensions can be configured from the Admin menu.
	File extension of the file:tif. The file extensions can be configured from the Admin menu.
	File extension of the file:txt. The file extensions can be configured from the Admin menu.
	File extension of the file:xls. The file extensions can be configured from the Admin menu.

Read

Icon	Description
	Document is read.
	Document has not been read.

Linktome

Icon	Description
	Link icon. This icon can be used to link DocRoom items.

My Basket

Icon	Description
	Document is not selected in your basket. Click on the icon to add it to your basket. The icon will then change into .
	Document is selected in your basket. Click on the icon to remove it from your basket. The icon will then change into .

My favorites

Icon	Description
	Document is not selected in your favorites. Click on the icon to add it to your favorites. The icon will then change into .
	Document is selected in your favorites. Click on the icon to remove it from your favorites. The icon will then change into .

CD rom

Icon	Description
	Document is not selected in your CD list. Click on the icon to add it to your CD list. The icon will then change into .
	Document is selected in your CD list. Click on the icon to remove it from your CD list. The icon will then change into .

Comments

Icon	Description
	No comments are available for this document. Click on this icon to add comments.
	Comments are available for this document. Click on the icon to view the comments

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	and/or to add new comments.

Version history

Icon	Description
	Click here to view the document version history. In a new window, all previous versions of the document and the files are shown.

Links

Icon	Description
	Click here to see the linked DocRoom items. In a new window, all linked items will be shown.

Document context menu icons

Icon	Label	Description
	Rename	Renames the document.
	Edit	Opens the document details in edit mode.
	Delete	Deletes the document.
	Check out	Will check-out the document.
	Check in	Checks in the new document version.
	Cancel check out	Cancels the check out.
	Add File	Opens the file insert window to add a file to the document.
	Send by Email	Opens an e-mail screen. This allows you to mail a link to the document, files and/or the files as attachment.
	View Previous file versions	Opens an overview of all previous versions of the document and its files.
	ACL Management	Opens the Access Control List, here you can edit the document security.

6.1.1.2 Document detail - Toolbar icons

Icon	Tooltip	Description
New	**New**	Create a new document. The default document insert screen will appear.
	Duplicate	Duplicate the current document. The new document is shown in edit mode. • Document name = Copy of *[name of the original document]* • All metadata are copied. • Files are not copied
	Save	Click here to save the made changes.
	Save and edit next	Save the changes, close the detail of the current document and open the next document in edit mode.
	Cancel	Changes on the document are not saved.
	Delete	Click here to move the document to the recycle bin.
	Check out	Check-out document. By checking out a document you can create a new version of this document.
	Check in	Check-in document. When the new version of the document has been created you can check-in this document to make the new version available for other users.
	Cancel check out	Cancel check-out. The document status will be restored to in production. No changes will be saved.
	Add file	Add a file to the document.

	Add mail	Add a mail message.
	Add comment	Click on this icon to add comments.
	Comments	Click on the icon to view the comments and/or to add new comments.
	Add message	Add an internal Doma message.
	Messages	Click on the icon to view the internal Doma messages and/or to add a new one.
	Copy/move to folder	Opens a window from where you can copy/move the document to another DocRoom folder.
	Add to favorites	Add item to your favotites.
	ACL management	View/change document security settings.
	History	Shows the actions done on this document.
	Version history	Opens an overview of all previous versions of the document and its files.

6.1.2 Folder icons

6.1.2.1 Web tree icons

Icon	Description
	This icon indicates the root folders ***Folders*** and ***My DocRoom*** in the tree structure.
	This icon indicates a folder in the tree structure. Different folder icons are possible depending on the configuration of the folder type.
	In *What's new* you can find a list of all documents/folders that were added during the current day.There is no limitation on the number of documents in the *What's new* list.
	Icon indicating the ***My Basket*** folder.
	Icon indicating the ***My Favorites*** folder.
	Icon indicating the ***Recent Documents*** folder. In this folder you can find the documents/folders you have recently opened.
	Icon indicating the ***My Documents*** folder. This is your personal folder that was created the first time you logged on to the system.
	Icon indicating the ***My checked-out documents*** folder. This is the list of the documents/files you have checked-out.
	This icon indicates the ***My Subscriptions*** folder.
	Icon indicating the ***Recycle bin*** folder. The items you have deleted will appear in the Recycle Bin. Depending on your user rights, you can remove the items you want to delete permanently from the Recycle Bin. You can restore an item by right-clicking on it and choosing the option ***Restore***.
⊞	Expand. Click here to show the subfolders in the tree structure.
⊟	Collapse. Click here to hide the subfolders of the folder.

6.1.2.2 Result list icons

Multiselect

Icon	Description
	Selection box. The selection box can be used to select certain items to do an action on them. Actions are available in the result list toolbar.
	Selection box when the folder has been selected.

Status

Icon	Description
	Folder status: In Production. This means that the folder is available.
	Shortcut to a folder in production.
	Folder status: In Progress. This means that you have checked-out this folder.
	Shortcut to a folder in progress.
	Folder status: In Creation. This means that the folder has been created but not yet saved by the user who has created it.
	Shortcut to a folder in creation.
	Folder status: Locked.
	Shortcut to a locked folder.

Linktome

Icon	Description
	Link icon. This icon can be used to link DocRoom items.

My Basket

Icon	Description
	Document is not selected in your basket. Click on the icon to add it to your basket. The icon will then change into .
	Document is selected in your basket. Click on the icon to remove it from your basket. The icon will then change into .

My favorites

Icon	Description
	Document is not selected in your favorites. Click on the icon to add it to your favorites. The icon will then change into .
	Document is selected in your favorites. Click on the icon to remove it from your favorites. The icon will then change into .

CD rom

Icon	Description
	Document is not selected in your CD list. Click on the icon to add it to your CD list. The icon will then change into .
	Document is selected in your CD list. Click on the icon to remove it from your CD list. The icon will then change into .

Comments

Icon	Description
	No comments are available for this document. Click on this icon to add comments.
	Comments are available for this document. Click on the icon to view the comments and/or to add new comments.

Links

Icon	Description
	Click here to see the linked documents. In a new window, all linked documents will be shown.

Folder context menu icons

Icon	Label	Description
	Add	Add an item to the selected folder.
	Browse	Open the folder and see its content.
	Search	Open a search screen to search in the folder.
	Explore	Open the folder as a root folder in a new window.
	Open	Open the folder metadata.
	Rename	Renames the folder.
	Edit	Opens the folder details in edit mode.
	Delete	Deletes the folder.
	Subscribe	Subscribe to the folder. You will receive an E-mail when new items are added to the folder.
	ACL Management	Opens the **A**ccess **C**ontrol **L**ist, here you can edit the folder security.
	Index	Will show the folders indexes in a pop-up window.

6.1.2.3 Folder detail - Toolbar icons

Icon	Tooltip	Description
New	**New**	Create a new folder. The default folder insert screen will appear.
	Duplicate	Duplicate the current folder. The new folder is shown in edit mode. • Folder name = Copy of *[name of the original folder]* • All metadata are copied.
	Save	Click here to save the made changes.
	Save and edit next	Save the changes, close the detail of the current folder and open the next item in edit mode.
	Cancel	Changes on the folder are not saved.
	Delete	Click here to move the document to the recycle bin.
	Add comment	Click on this icon to add comments.
	Comments	Click on the icon to view the comments and/or to add new comments.
	Add message	
	Messages	
	Copy/move to folder	Opens a window from where you can copy/move the folder to another DocRoom folder.
	Add to favorites	
	ACL management	View/change folder security settings.
	History	Shows the actions done on this folder.

6.1.3 Workflow icons

6.1.3.1 Result list icons

Multiselect

Icon	Description
	Selection box. The selection box can be used to select certain items to do an action on them. Actions are available in the result list toolbar.
	Selection box when the document has been selected.

Status

Icon	Description
	This icon indicates a Case category that is not yet finished.
	This icon indicates a Case category that has been archived. All Routing actions have ended for this dossier.

Expand

Icon	Description
	All files but the main file are hidden; click on this icon to expand and show the other files of the document.
	All files are shown. Click on this icon to collapse and hide all but the main file.

Workflow - linked files

Icon	Description
	File extension of the file: Word or rtf. The file extensions can be configured from the Admin menu.
	This icon indicates a file extension that did not receive a specific icon. The file extensions can be configured from the Admin menu.
	File extension of the file:gif or jpg. The file extensions can be configured from the Admin menu.
	File extension of the file:htm. The file extensions can be configured from the Admin menu.
	File extension of the file:pdf. The file extensions can be configured from the Admin menu.
	File extension of the file:ppt . The file extensions can be configured from the Admin menu.
	File extension of the file:tif. The file extensions can be configured from the Admin menu.
	File extension of the file:txt. The file extensions can be configured from the Admin menu.
	File extension of the file:xls. The file extensions can be configured from the Admin menu.

Read

Icon	Description
	Document is read.
	Document has not been read.

Linktome

Icon	Description
	Link icon. This icon can be used to link DocRoom items.

My Basket

Icon	Description

	Document is not selected in your basket. Click on the icon to add it to your basket. The icon will then change into .
	Document is selected in your basket. Click on the icon to remove it from your basket. The icon will then change into .

My favorites

Icon	Description
	Document is not selected in your favorites. Click on the icon to add it to your favorites. The icon will then change into .
	Document is selected in your favorites. Click on the icon to remove it from your favorites. The icon will then change into .

CD rom

Icon	Description
	Document is not selected in your CD list. Click on the icon to add it to your CD list. The icon will then change into .
	Document is selected in your CD list. Click on the icon to remove it from your CD list. The icon will then change into .

Comments

Icon	Description
	No comments are available for this document. Click on this icon to add comments.
	Comments are available for this document. Click on the icon to view the comments and/or to add new comments.

Links

Icon	Description
	Click here to see the linked DocRoom items. In a new window, all linked items will be shown.

Workflow context menu icons

Icon	Label	Description
	Delete	Deletes the item.
	ACL Management	Opens the Access Control List, here you can edit the document security.

6.1.3.2 Workflow detail - Toolbar icons

Icon	Name	Description
Save	**Action button Save**	Saves all entered information. The dossier stays locked by your user.
Unlock	**Action button Unlock**	Unlocks your dossier. The dossier is available in the work list of all users to whom it was assigned.
Release	**Action button Release**	Releases the step to the next step of the procedure.
Suspend	**Action button Suspend**	Suspends the dossier. Suspended dossiers are by default hidden in the result lists. You can show them by clicking on the button ***Show Suspended*** in the toolbar of the result list.
Reject	**Action button Reject**	Rejects the dossier. When rejected, the dossier is sent to the previous step executor with a remark why it has been rejected.
	Add file	Add a file to the document.
	Add mail	

	Add comment	Click on this icon to add comments.
	Comments	Click on the icon to view the comments and/or to add new comments.
	Add message	
	Messages	
	Copy/move to folder	Opens a window from where you can copy/move the document to another DocRoom folder.
	Add to favorites	
	ACL management	View/change document security settings.
	History	Shows the actions done on this document.
	Version history	Opens an overview of all previous versions of the document and its files.
	Open Next Case on Close	If selected, the next dossier will be opened when the current is closed.
	Previous Document	Click here to go to the previous item in the result list.
	Next Document	Click here to go to the next item in the result list.

6.1.4 Dossier icons

This overview will be added in a later version of this manual<

6.1.4.1 Web tree icons

This overview will be added in a later version of this manual<

6.1.4.2 Result list icons

This overview will be added in a later version of this manual<

6.1.4.3 Toolbar icons

This overview will be added in a later version of this manual<

6.1.5 Icons in Routing WorkFlow

Active procedure (My work, my dossiers, open dossiers). *This can also be a procedure of a case category.*

Procedure that has ended (Routing Archive).

Workflow procedures cannot be found in the tree structure of the DocRoom Library.

6.1.5.1 Result list icons

This overview will be added in a later version of this manual<

6.1.5.2 Toolbar icons

This overview will be added in a later version of this manual<

7 Constants in Doma 6

In DocRoom en Routing, a number of constants exist which can be used in different configurations like e:

- Definition of Lookup properties
- Definition of Mail Templates
- Configured actions: when the value of a parameter can be configured manually, these constants can be used. At runtime these constants will be replaced by their actual values.
- Value of Procedure Parameters
- Value of HTML screen items (definition of detail screens)

Value	Description
	General constants
#LANGCODE#	**Language code of the logged in user**
#USER_LOGIN#	**Account of the logged in user**
#USER_GROUPS#	**List of all groups to which the logged in user belongs**
#USER_ROLES#	**List of all roles to which the logged in user belongs**
	Routing workflow constants
#TECH_ID#	**Instance ID of the workflow case**
#CASE_ID#	**ID of the workflow case (the same for all instances of a workflow case)**
#CASE_NAME#	**Name of the workflow case**
#STEP_EXECUTOR#, #USER_STEPEXECUTOR#	**Account of the person who opened (and locked) the case for editing. This is the person who is actually working on the workflow case.**
#USER_STARTER#	**Account of the person (or process) who started the workflow case.**
#DOSSIER_ID#	**ID of the dossier in which the workflow cases are sitting.**
#CASE_DESCRIPTION#	**Description of the workflow case**
#CASE_LISTINFO#	**Listinfo parameter for the workflow case**
#CASE_LISTINFO2#	**Listinfo2 parameter for the workflow case**
#CASE_LISTINFO3#	**Listinfo3 parameter for the workflow case**
#STEP_NAME#	**Name of the step in which the case instance sits.**
#PROC_NAME#	**Name of the procedure of the workflow case.**
#PROC_NAME_LABEL#	**Name of the procedure mentioned in the label.**
#STEP_DUE#	**Due date of the current step for the current case**
#STEP_NAME_LABEL#	**Name of the step mentioned in the label.**
#CASE_DUE#	**Overall due date of the current case**
#STEP_START#	**Start date of the current step for the current case**
#CASE_START#	**Start date of the current case**
	Object constants
#OBJ_ID#	**Object ID of the current object**
#OBJ_DIN#	**Object DIN of the current object**
#PARENT_OBJ_ID#	**ID of the folder in which the object sits**
#CAT_ID#	**ID of the category of the current object**
#CAT_NAME_LABEL#	**Name of the category mentioned in the label.**
#CASE_ID#	**Current case_id**
#OBJ_NAME#	**Name of the current object**
#PARENT_NAME#, #FOLDER_NAME#	**Name of the folder in which the object sits**
#PARENT_PATH#, #FOLDER_PATH#	**Entire path of the folder in which the object sits**