Arco

Doma 6
Application administrator manual
12. Screens and site management

A new era in document management.

Doma 6

Application
Administrator Manual
12. Screens and site management

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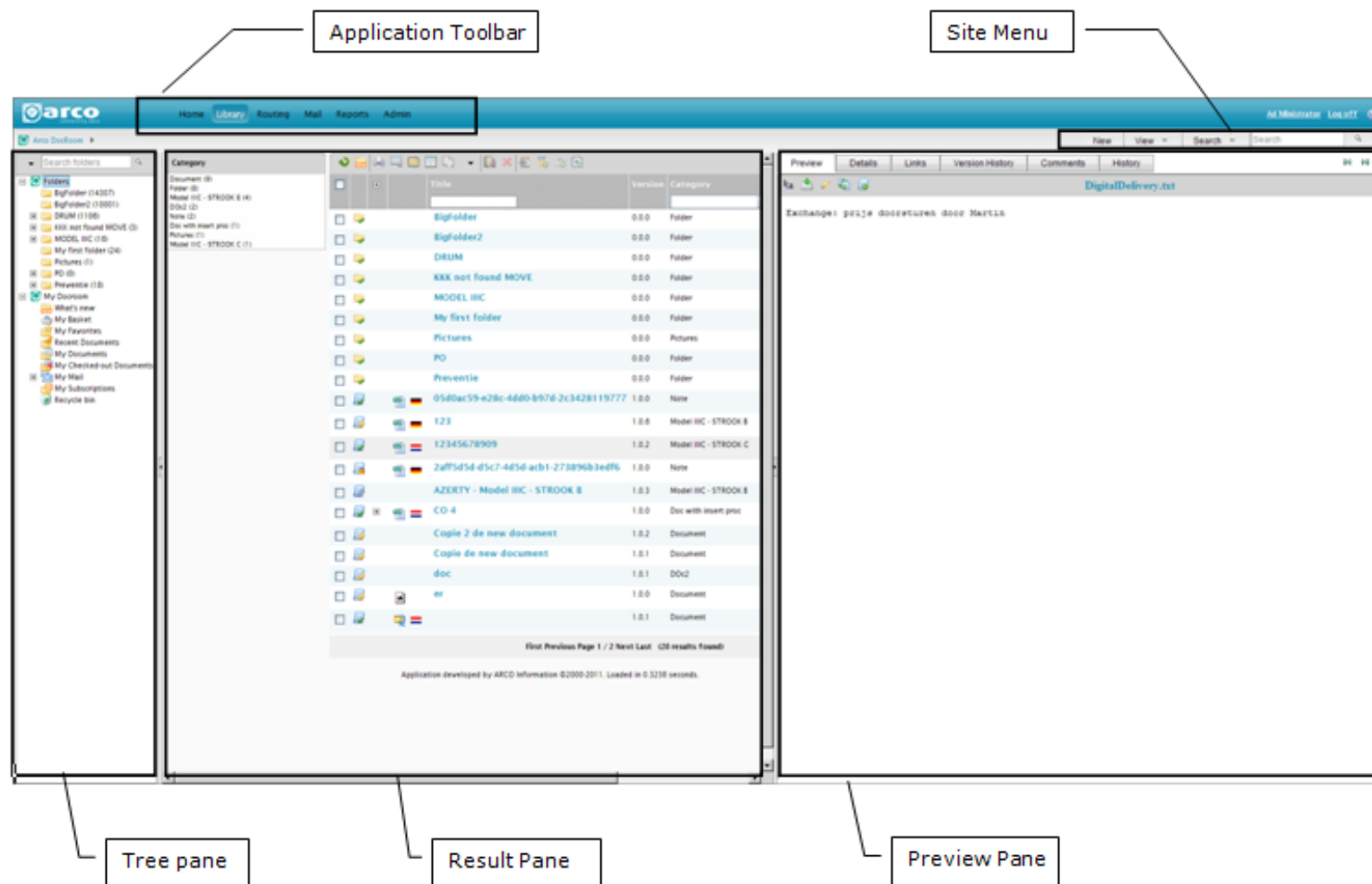*Described Doma version: 6.5.1*

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Manual Modification Follow-Up

Ref.	Date	Author	Modification description / Affected paragraphs
	27/06/2011	Walter Vander Goten	Manual creation
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Contents

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Arco digital paperflow

Application Toolbar

Site Menu

Tree pane

Result Pane

Preview Pane

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1 General overview of a DocRoom and Routing environment

1.1 Application toolbar

At the top level of a DocRoom and Routing environment we see the Application Toolbar. This is the blue top level bar on which we distinguish:

-   Home: homepage for the user
-   Library: document and routing objects
-   Routing: Manage your work
-   Mail: overview of the internal sent and received messages
-   [Reports: custom application. Different custom applications can be created, each of them with their custom toolbar.]
-   Admin: Administration of the docroom site

These are the default Application Sites in DocRoom, they are defined in the web.sitemap file that can be found in [DomaRoot]\Web\DocRoom (see full description below).

1.2 Application Sites

Every item in the Application toolbar refers to an Application Site.
An Application Site can have a separate Site Definition. Different Application Sites can also share the same Site Definition. Every Application site consists of the a number of Panes:

-   Site Menu
-   Tree Pane
-   Result Pane
-   Preview Pane

1.2.1 Site definitions

A Site Definition is a folder (in [DomaRoot]\Data\Sites\) in which the XML files with the sites configuration can be found.

A number of Site definitions are installed by default. […]

-   Root: The root site is the base site of a docroom installation. If a definition file is not found in a specific site, the definition file will be taken from the Root site. The root site is updated whenever DocRoom is upgraded.

-   Default: the default site is the site that is used by default when installing docroom. By default this site is empty so all definition files from the Root site are used. If you want to deviate from the Root site, copy the configuration file to the Default Site and make the necessary changes. This site is not updated when DocRoom is upgraded.

-   AddToCasePackage: Site definition that is used when a user wants to add a DocRoom object to a Case Package.

-   AddToDossiers: Site definition that is used when a user wants to add a DocRoom object to a Dossier Package.

-   AddToPackage: Site definition that is used when a user wants to add a DocRoom object to an object Package.

-   ExploreDossier: Site definition that is used when a user explores a dossier in DocRoom.

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- ExploreFolder: Site definition that is used when a user explores a folder in DocRoom.

- Xsd: folder containing the xsd files for all site configuration files.

1.2.2 Site menu

The site menu offers the users a number of actions immediately available for the current Application Site. This menu is only refreshed when users change from one site to another and is not changed when a user navigates in the same site.

The Site menu is defined in an xml file and a reference to this file is made in the Application Toolbar configuration. This xml file should exist in the Site Definition folder of your application site (also defined in the Application Toolbar configuration).

1.2.3 Tree Pane

In the Tree Pane, the DocRoom tree structure is shown. The Tree Pane can hold one or more tree structure parts and menus. The Tree Pane is defined in the file [DomaRoot]\Data\Sites\[SiteDefitionName]\TreePage.xml. The TreePage.xml references one or more tree.xml files, for which the names can be chosen. If there is only one Tree definition, this can be placed directly in the Tree.xml file (for backwards compatibility).

Tree search
A user can search for the folder he wants to work with. The search within the tree structure only takes into account the title of the folder.
The result of this search is a list of folders containing the search term and the parent folder structure of the results. Users can still navigate to the lower level folder nodes.

Tree filters
Predefined filters to narrow the list of folder shown in the tree structure.

Treestructure
The hierarchical view of the existing folders is shown in a tree view. This tree view contains static folders and/or dynamic folders. The dynamic folders are based on defined searches or on the propagation of the existing values of a property in DocRoom. Dynamic folders can exist on different levels.

My DocRoom
A number of shortcuts are foreseen for every user in his personal folder. Whether or not these nodes are shown to all users can be configured.

See [Tree Definition] for a complete description.

1.2.4 Result Pane

In the result pane users see the list of items in a folder, matching a query, their work, … Every list that is shown in DocRoom is defined by his [Result grid definition]. In general the result pane can contain

- Grouping pane:
  - o Show the criteria used in the user query.
  - o Show different values of system fields matching the results
  - o Show different values of searchable properties matching the results
  - o Show My Queries for the context I'm in (work, documents, open workflows, …)
  - o ➔ See [Grouping] for a full description.
- Result list toolbar:
  - o For every result list, a toolbar can be defined. This toolbar holds the options

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available for users when working with this set of results.
- o ➔ See [GridToolbar definitions] for a full description.
- Result lists:
  - o All the result grids used in docroom and routing can be configured.
  - o At least the DefaultResultGrid.xml for docroom and the CaseGrid.xml for routing must be present in the site folder. For every result list the columns, filters, groupers, sort order and toolbar can be configured.
  - o ➔ See [Result grid definition] for a full description.
  - o <u>Navigation control</u>: the navigation control on the bottom of the page indicates the number of results that exist in the result list. The user can scroll throught the results by clicking on the next, previous, ... links.
  - o <u>Predefined filters</u>:
    - ▪ A set of predefined filters can be configured to allow a user the filter the results in the result screen (for instance, by default only show the documents of the last year.
    - ▪ These filters can be optional or mandatory.
    - ▪ A filter can be applied/available for everyone or for a number of roles only.
    - ▪ Different filter files can be created. In the different result grid pages, the filter page to be used can be specified.
    - ▪ The filter file is optional.
    - ▪ ➔ See [Filters] for a full description

1.2.5   Preview pane

The preview window can be activated when clicking on a result in the result list. This preview window can consist of different tabbed windows:
- <u>Preview</u>: this tab shows the preview of the main file that is attached to the selected document.
- <u>Details</u>: this tab shows the meta data of the selected document.
- <u>Links</u>: this tab gives an overview of the objects to which the selected document is linked.
- <u>Comments</u>: on this tab, the different comments concerning the selected document are shown.
- <u>Versions</u>: this tab gives an overview of the version history of the document and his files.
- <u>History</u>: this tab gives an overview of the audit trail of a document.

The preview window can be resized (although the size is not remembered) and can be closed at any time by clicking on the [Close] link in the top right corner of the preview window.

1.2.6   Detail window

No longer used.

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2   How can a DocRoom application site be configured from system management point of view.

Different (functional) sites can be configured within a docroom installation. Every site configuration is grouped in a subdirectory of the Sites virtual directory, under the DocRoom website.The site configuration consists of the following files:

- CaseGrid.xml: defines the workflow result list of the site. Used by default for 'My Workflows', 'Open Workflows' in Routing
    - o Toolbar definition: CaseGridToolbar.xml
    - o <u>Optional</u>:
        - ▪ CaseArchiveGrid.xml ➜ CaseArchiveGridToolbar.xml
        - ▪ MyWorkGrid.xml ➜ MyWorkGridToolbar.xml
        - ▪ CaseOpenAndArchivedGrid.xml ➜ CaseGridToolbar.xml
        - ▪ CasePrintGrid.xml
- ContextMenus.xml: holds the items that should not be visible in the default context menus of result lists and the DocRoom tree.
- DefaultUserPrefs.xml: holds the default set of user preferences for the site. [… wat als je er effectief verschillende hebt? Wat wordt naar het user profiel weggeschreven?]
- DefaultResultGrid.xml: holds the definition for the default docRoom result lists.
    - o Toolbar definition: DefaultGridToolbar.xml
    - o <u>Optional</u>:
    - o BasketGrid.xml ➜ BasketGridToolbar.xml
    - o BrowseGrid.xml ➜ DefaultGridToolbar.xml
    - o CDRomGrid.xml ➜ CDRomGridToolbar.xml
    - o FavoritesGrid.xml ➜ FavoritesGridToolbar.xml
    - o LinkedDocsGrid.xml ➜ DefaultGridToolbar.xml
    - o MyCheckedOutDocsGrid.xml
    - o PreviousVersionsGrid.xml
    - o PrintGrid.xml
    - o RecycleBinGrid.xml ➜ RecyclebinGridToolbar.xml
    - o SearchResultGrid.xml ➜ DefaultGridToolbar.xml
    - o WhatsNewGrid.xml ➜ DefaultGridToolbar.xml
    - o RecentDocsGrid.xml ➜ DefaultGridToolbar.xml

- PackageGrid.xml ➜ DefaultPackageGridToolbar.xml
- DossierPackageGrid.xml ➜ DefaultDossiersPackageGridToolbar.xml

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- DefaultSorting.xml
- DetailFileGrid.xml
- DragAndDrop.xml
- Filters.xml
    - Optional
    - WhatsNewFilter.xml
- Grouping.xml
    - Optional:
    - CaseArchiveGrouping.xml
    - CaseGrouping.xml
    - NoGrouping.xml

- ListFileGrid.xml
- ListMainFileGrid.xml

- MailDeletedbox.xml
- maildeletedboxtoolbar.xml
- MailFollowUp.xml
- mailfollowupgrouping.xml
- MailFollowUpToolbar.xml
- MailGrid.xml
- MailGrouping.xml
- MailInbox.xml
- mailInboxToolbar.xml
- MailOutbox.xml
- MailOutboxtoolbar.xml
- MyMail.xml
- mymailtoolbar.xml
- MyMailWork.xml

- ObjectTooltip.xml

- PreviewTabs.xml
- SelectFolder.xml

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- Site.xml

- TreePage.xml
- Tree.xml
- Menus
    - HomeMenu.xml
    - LibraryMenu.xml
    - Routing.xml
    - MailMenu.xml
    - AdminMenu.xml

When the specific file is not found in the site directory, the file is taken from the Root site. This site is always updated when upgrading your environment. Per site, only add the files that deviate from the root site.

2.1   Sitemap

The sitemap defines the main structure of the doma application. It defines the applications users can see in the docroom context.

```xml
<?xml version="1.0" encoding="utf-8" ?>
<siteMap xmlns="http://schemas.microsoft.com/AspNet/SiteMap-File-1.0" >
  <siteMapNode url="~" title="Main"  description="Main">
    <siteMapNode url="~/DefaultHome.aspx" title="Home"></siteMapNode>
<!--
        url: Url of the application to be loaded
        title: title of the application
        roles: comma separated list of roles that can see the node
        Licence: when specified, only users who have a license for the application can see the application in the list. It none is specified, everyone can see the application.
 -->

    <siteMapNode url="~/DefaultLib.aspx" title="Library"  description="" ></siteMapNode>
    <siteMapNode url="~/DefaultRouting.aspx" title="Routing"  description="" Licence="Routing"></siteMapNode>
    <siteMapNode url="~/DefaultMail.aspx" title="Mail"  description=""></siteMapNode>
    <siteMapNode url="~/DefaultAdmin.aspx" title="Admin"  description="" roles=""></siteMapNode>

  </siteMapNode>
</siteMap>
```

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Either a custom 'DefaultXXX.aspx' file can be used as the root folder for your application or a link to the Main.aspx file of DocRoom. The actual default pages used in the default DocRoom and Routing modules also redirect to the Main.aspx file. The querystring parameters are hidden from users in the web.sitemap file this way.

See [Main.aspx file explained] for a full description of the parameters that can be used when calling the Main.aspx file.

2.2   Site definition

2.3   Tree Definition

TreePage.xml defines the structure of the tree panel. If this file is not available DocRoom will use the Tree.xml page in which the folder structure is defined. If this file is used, a sliding panel is used to separate different tree definition pages.

```xml
<?xml version="1.0" encoding="utf-8" ?>
<treepage xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="..\Xsd\TreePage.xsd">
 <tree  file="Tree.xml"  name="Tree" nameE="" nameN="" nameF="" nameG=""  role="" />
<!--
          file: xml file name that holds the tree definition structure
          NameF: French label for the panel
          NameN: Dutch label for the panel
          NameG: German label for the panel
          NameE: English label for the panel
 -->

</treepage>
```

Two tree definition files exist in docroom:
- Tree.xml defines the options for the default treestructure of docroom.
- SelectFolder.xml defines the options for the treestructure when using the copy/move/shortcut to … functionality.

```xml
<?xml version="1.0" encoding="utf-8" ?>
<params xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="..\Xsd\Tree.xsd" >
```

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```
<param name="SHOWSPECIALNODES" value="Y"></param>
 <!--
          Y: show the special nodes at the right bottom of the tree window (what's new, my documents, ...)
          N: do not show these folders in the tree window
 -->
<param name="SHOWSPECIALNODESONSUBROOTS" value="Y"></param>
 <!--
          Y: show the special nodes at the right bottom of the tree window (what's new, my documents, ...) even when 'exploring' a folder
          N: do not show these folders in the tree window
 -->
<param name="RECURSIVEACL" value="Y"></param>
 <!--
          Recursive acl: this means that you will be able to access folders on a lower level without the need of having access to the higher level folders in the tree structure.
          The higher level folders are shown to the user but the user cannot do anything with these folders. They are only shown to allow the user to navigate to the folder he has access to.

          The usage of recursive acl can decrease the performance of tree navigation slightly.
          Y: use recursive acl when navigating through the tree structure
          N: do not use recursive acl. The user needs access to every level of the tree. If this is not the case, the folder will not be shown in the tree (and the user cannot navigate to the lower level
folders.
 -->
<param name="RECURSIVEACLINCLUDEDOCUMENTS" value="Y"></param>
 <!--
          Recursive acl: this means that you will be able to access folders on a lower level without the need of having access to the higher level folders in the tree structure.
          The higher level folders are shown to the user but the user cannot do anything with these folders. They are only shown to allow the user to navigate to the folder he has access to.
When recursive acl includes documents, you will also see the folder structure when you only have access to 1 document in a folder. This could cause a performance overhead when a large number
of folders exist in the tree structure when browsing the tree structure.
          Y: include documents in the recursive acl calculation when navigating through the tree structure
          N: do not include documents when calculating the recursive acl. The user needs at least access to the lowest level folder to be able to browse to this document.
If this is not the case, the folder will not be shown in the tree (and the user cannot navigate to the lowest level folder).
When the number of nodes in the tree structure is very large, browsing is not the recommended to navigate to/find a document.
This parameter is only relevant if the RECURSIVEACL parameter is set to 'Y'.
 -->
 <param name="DRAGDROP" value="Y"></param>
 <!--
          Y: Drag 'n drop in the tree window to move a folder (and subfolders) to a new location, is enabled.
          N: Drag 'n drop is deactivated in the tree window.
 -->
 <param name="DEFAULTROOTACTION" value="BrowseCommand"></param>
 <!--
          Default root action: this is the action that is executed when clicking on the root folder. This action is also the default for the other folders if they do not explicitly deviate from the default.
          Possible values:
          - OpenCommand
          - BrowseCommand: browse the content of the folder
          - SearchCommand:
```

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```
            - ExploreCommand:
            - AddCommand:
            - EditCommand:
            - AclCommand
            - ExpandAllCommand
            - WorkView
            - DossierView
            - OpenDossierView
            - MyDossierView
            - ArchiveView
 -->
 <param name="DEFAULTROOTSEARCHSCREEN" value="0"></param>
 <!--
            Default root searchscreen: this is the id of the searchscreen that will be used if the default action = 'SearchCommand' or if the user right clicks the folder and selects the 'search' option.
            By default the id = 0, this means that the standard docroom search screen will be shown
 -->
 <param name="DEFAULTROOTRESULTSCREEN" value="0"></param>
 <!--
            Default root resultscreen: this is the id of the resultscreen that will be used if the default action = 'BrowseCommand' or if the user chooses to perform a search via the default docroom
 search screen.
            By default the id = 0, this means that the 'DefaultResultGrid' will be used.
 -->
 <param name="SHOWDOCUMENTCOUNT" value="N"></param>
 <!--
            Show document count: when enabled, the number of documents that exist in a folder (subfolders included) are shown in the treestructure.
 -->
 <param name="ORDERBY" value="OBJ_UNAME asc"></param>
 <!--
            Order by: the sorting order of the tree structure.
 -->
 <param name="INITIALCOLLAPSEROOTNODE" value="Y"></param>
 <!--
            If enabled, the docroom folder will be collapsed when loading the docroom tree structure.
 -->
 <param name="SHOWFAVORITEFOLDERS" value="1"></param>
 <!--
            If SHOWSPECIALNODES is activated, this option will show all favorite folders under the 'Favorites' folder in my docroom as subfolders.
            If SHOWSPECIALNODES is not activated, this option will show the favorite folder as a new root folder under which all favorite folders are shown.
 -->
 <param name="SHOWBASKETFOLDERS" value="1"></param>
 <!--
            If SHOWSPECIALNODES is activated, this option will show all basket folders under the 'Basket' folder in my docroom as subfolders.
            If SHOWSPECIALNODES is not activated, this option will show the basket folder as a new root folder under which all basket folders are shown.
 -->
```

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```
<param name="SHOWMYSUBSCRIPTIONS" value="1"></param>
<!--
        If SHOWMYSUBSCRIPTIONS is activated, this option will show the my subscriptions shortcut.
        If SHOWMYSUBSCRIPTIONS is not activated, this option will not show the my subscriptions shortcut.
-->
<param name="SHOWSPECIALNODESONSUBROOTS" value="1"></param>
<!--
        If SHOWSPECIALNODESONSUBROOTS is activated, the special nodes will also be shown when exploring a folder.
        If SHOWSPECIALNODESONSUBROOTS is activated, the special nodes will not also be shown when exploring a folder.
-->

<param name="HIDDENSPECIALNODES" value="xxx"></param>
<!--
        HIDDENSPECIALNODES contains a comma separated list of (special) nodes that you want to hide. Possible values are new,basket,favorite,mail,checked,recycle,recent,subscription,my
        document.
-->
<param name="SEARCHHIERARCHICAL" value="0"></param>
<!--
        SEARCHHIERARCHICAL (0/1): 1 = search results are shown hierarchically (pre doma 6.1 mode), 0 = search as flat list (default).
-->
<param name="MAXSEARCHRESULTS" value="100"></param>
<!--
        MAXSEARCHRESULTS (numeric): number of results to be shown after a query in the tree.
-->

<filters>
<!--
        Filters allow you to show only subselections of the entire tree in the treestructure.
        A number of options are foreseen:
        - index: unique number that identifies the filter
        - name: this is the name of the filter
        - nameE: English label for the filter
        - nameN: Dutch label for the filter
        - nameF: French label for the filter
        - nameG: German label for the filter
        - recursive ("True"/"False") : if 'recursive' will show folders for which the filter does not apply but which are necessary to allow a user to navigate to a foldor for which the filter does apply
                Activating the recursive parameter might invoke a decrease in performance on big tree structures (> 5000 items)
        - autopostback ("True"/"False"): automatically refresh the treestructure if the filter is activated or deactivated.
        - enabled ("True"/"False") : default value for the filter
        - value: this value is the query syntax that will be applied to the folder selection when the filter is activated
        - disabledvalue: this value is the query syntax that will be applied to the folder selection when the filter is deactivated. This can be empty.
        - visible ("True"/"False") : make the filter visible in the tree window or not.
- ROLES TODO
```

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```
-->
  <filter index="1"  name="Active Only" nameE="" nameN="" nameF="" nameG="" autopostback="True"      enabled="True" value="OBJ_ACTIVE=1" disabledvalue=""
visible="True"></filter>
  <filter index="2"  name="Language" enabled="False"  value="(IDX_11546 = 'N' or IDX_11546 is Null)" disabledvalue="" visible="False" ></filter>
  <filter index="3" name="Name" enabled="False" value="OBJ_NAME like 'f%'" disabledvalue="" visible="False"></filter>
  <filter index="4" name="Standard Folders only" enabled="False" autopostback="True" value="CAT_ID=1006" disabledvalue="" visible="True"></filter>
  <filter index="5" name="Security Folders only" enabled="False" autopostback="True" value="OBJ_ID=OBJ_ACL_ID" disabledvalue="" visible="True"></filter>
  </filters>
</params>
```

2.4   Menu (xxxMenu.xml)

Every application in the sitemap has a menu file, describing all options available from the application menu.
By default following menu files exist:
- HomeMenu.xml
- LibraryMenu.xml
- RoutingMenu.xml
- MailMenu.xml
- AdminMenu.xml

All items in the menu can be ordered and placed according to the needs of an organisation. Any number of new items can be added or removed.

See below for a general description of the menu files

```
<?xml version="1.0" encoding="iso-8859-1" ?>
<Menu>
<Group Flow="Horizontal">
<!--
This file contains the menu items that are shown to an end user. A number of predefined actions are available for use in this file. Besides the default items, an unlimited number of other items can be
added.
For every item the following parameters exist:
     - Text=""              : The name of the menu item. For a number of predefined actions, this name must not be changed.
     - LabelE=""            : English label for the menu item
     - LabelN=""            : Dutch label for the menu item
```

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```
        - LabelF=""          : French label for the menu item
        - LabelG=""          : German label for the menu item
        - LeftLogo=""        : icon to be shown in the menu item (always on the left of the label)
        - NavigateURL=""     : contains the command that has to be executed when clicking the menu option
        - Roles="": comma separated list of roles that can see the menu item. If this item is left blanc, everybody can see the menu item.
        - AdminOnly="Y"      : If this parameter has a "Y" value, only people with configure system access on the docroom root folder can see this menu item.
 -->

<!-- Add a separator in the menu structure  -->
<!-- =========================== -->
<Item IsSeparator="True" />


<!-- Items to create new docroom objects -->
<!-- =========================== -->
<Item Text="Add docroom objects">
<Group>
<!-- Add the list of documents that can be created in docroom. This list is dynamic and is refreshed when the users changes from one folder to another. -->
<Item  Text="New Document" LabelE="Add document" LabelN="Document toevoegen" LabelF="Ajouter document" LabelG="" LeftLogo="../Images/File.gif"
NavigateURL="Javascript:openmenu('DM_SELECT_OBJ_CAT.aspx?CAT_TYPE=Document','NewDoc');"/>

<!-- Opens the list of documents that can be created in the current folder in the main window. This list keeps into account the rights of the user in the current folder and the allowed document types
in the current folder type. -->
<Item  Text="New Document List2" LabelE="Add document" LabelN="Document toevoegen" LabelF="Ajouter document" LabelG="" LeftLogo="../Images/File.gif"
NavigateURL="Javascript:Goto('DM_SELECT_OBJ_CAT.aspx?CAT_TYPE=Document',8,0);"/>

<!-- Create a new object of a specific category. The user is redirected to the insert screen -->
<Item  Text="New object ..." LabelE="" LabelN="Nieuw object ..." LabelF="Nouveau objet ..." LabelG="" LeftLogo="../Images/File.gif" NavigateURL="Javascript:NewObject('1001');"/>

<!-- Add the list of folders that can be created in docroom. This list is dynamic and contains all folder types that can be created in the current folder. -->
<Item  Text="New Folder" LabelE="Add folder" LabelN="Folder toevoegen" LabelF="Ajouter repertoire" LabelG="" LeftLogo="../Images/newFolderIcon.gif"
NavigateURL="Javascript:Goto('DM_SELECT_OBJ_CAT.aspx?CAT_TYPE=Folder');" />

<!-- Opens the list of folder that can be created in the current folder. This list keeps into account the rights of the user in the current folder and the allowed folder types in the current folder type. -->
<Item  Text="New Folder List" LabelE="Add folder" LabelN="Folder toevoegen" LabelF="Ajouter repertoire" LabelG="" LeftLogo="../Images/newFolderIcon.gif"
NavigateURL="Javascript:Goto('DM_SELECT_OBJ_CAT.aspx?CAT_TYPE=Folder',8,0);" />

<!-- Add a workflow procedure in the current folder. This link does not show every available procedure in the menu structure but redirects the user to a list of procedures that can be started in the
current folder. -->
<Item  Text="New Dossier" LabelE="Start procedure" LabelN="Procedure starten" LabelF="Demarrer procedure" LabelG="" LeftLogo="../Images/AddNewItem.gif"
NavigateURL="Javascript:GotoWorkFlowPage('WF_Procs.asp',3);" />

<!-- Add a new mail in the current folder. -->
<Item  Text="New Mail" LabelE="Create new e-mail" LabelN="Email bericht aanmaken" LabelF="Creer nouveau courriel" LabelG="" LeftLogo="../Images/email.gif"
NavigateURL="Javascript:openmenu('./MailClient/Compose.aspx','NewMail');" />
```

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```
<!-- Add a property expansion under the current folder. -->
<Item  Text="New Property Expansion" LabelE="Add property expansion" LabelN="Veld gebaseerde folders aanmaken" LabelF="Creation repertoire dynamique" LabelG=""
LeftLogo="../Images/TreeView.gif" NavigateURL="Javascript:Goto('DM_EDIT_QUERY.aspx');" />

<!-- Subscribe to the current folder. -->
<Item  Text="New Subscription" LabelE="Subscribe" LabelN="Abonneren" LabelF="" LabelG="" LeftLogo="../Images/read.gif" NavigateURL="Javascript:SubScribe();" />
</Group>
</Item>

<!-- Items that perform actions on a selection in the current result list -->
<!-- ================================================== -->
<Item Text="Actions">
<Group>
<!-- This item loads all defined custom actions that exist in the current configuration. When clicking on an action link, the code behind is executed for all selected items of the current result list. -->
<Item Text="Actions" LabelE="Actions" LabelN="Extra acties" LabelF="Actions" LabelG="">
        <Group Flow="Vertical" OffsetX="0">
        </Group>
</Item>

<!-- This item downloads all files belonging to selected items from the current result list in a single ZIP file. -->
<Item Text="Download to ZIP" LabelE="Download to Zip" LabelN="Downloaden in ZIP" LabelF="Telechargement en ZIP" LabelG="" LeftLogo="../Images/zip.gif"
NavigateUrl="javascript:DoDocumentListAction(2);"/>

<!-- Removes all items from the favorites list of the logged in user. -->
<Item Text="Link as" LabelE="" LabelN="" LabelF="" LabelG="" LeftLogo="../Images/LinkTab2.gif"/>

<!-- Removes all items from the favorites list of the logged in user. -->
<Item Text="Delete" LabelE="" LabelN="" LabelF="" LabelG="" LeftLogo="../Images/deleteIcon.gif" NavigateUrl="javascript:DoDocumentListAction(4);"/>

<!-- Copy/Move/create shortcut for all selected objects in another folder. -->
<Item Text="Copy/Move to Folder" LabelE="" LabelN="Kopieren/Verplaatsen naar map" LabelF="Copier/Deplacer/Raccourci vers..." LabelG=""  NavigateUrl="javascript:CopyMoveSelection();"
LeftLogo="../Images/Copy.gif" />

<!-- Select all or deselect all object in the current page. -->
<Item Text="Toggle Selection" LabelE="" LabelN="" LabelF="" LabelG="" LeftLogo="../Images/SelectAll.gif" NavigateUrl="Javascript:SelectAll();" />

<!-- Send the selected documents via mail. -->
<Item Text="Send by mail" NavigateUrl="javascript:MailObjectSelection(false);" />

<!-- Send shortcuts to the selected documents via mail. -->
<Item Text="Send shortcuts by mail" NavigateUrl="javascript:MailObjectSelection(true);" />

<!-- Open the print dialog for the result list. -->
```

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```
<Item Text="Print" LabelE="Print" LabelN="Afdrukken" LabelF="Imprimer" LabelG="Abdrucken" LeftLogo="../Images/icon_print.gif"  NavigateUrl="javascript:PrintListPage();"/>
</Group>
</Item>


<!-- Favorites handling -->
<!-- ============ -->
<Item Text="Favorites and basket">
<Group>
<!-- Add the selected items from the current result list to the users favorites. -->
<Item Text="Add to favorites" LabelE="Add to favorites" LabelN="Toevoegen aan favorieten" LabelF="Ajouter aux favoris" LabelG="" NavigateUrl="Javascript:AddToFavorites();"/>

<!-- Remove the selected items in the current result list from the users favorites. -->
<Item Text="Remove from favorites" LabelE="Remove from favorites" LabelN="Verwijderen van de favorieten" LabelF="Enlever des favoris" LabelG=""
NavigateUrl="Javascript:RemoveFromFavorites();" />

<!-- Removes all items from the favorites list of the logged in user. -->
<Item Text="Remove all from favorites" LabelE="Clear favorites" LabelN="Favorieten leegmaken" LabelF="Effacer favoris" LabelG="" NavigateUrl="Javascript:ClearFavorites();" />


<!-- Basket handling -->
<!-- =========== -->
<!-- Add the selected items to the basket of the logged in user. -->
<Item Text="Add to basket" LabelE="" LabelN="" LabelF="" LabelG="" NavigateUrl="Javascript:AddToBasket();"/>

<!-- Removes the selected items from the basket of the logged in user. -->
<Item Text="Remove from basket" LabelE="" LabelN="" LabelF="" LabelG="" NavigateUrl="Javascript:RemoveFromBasket();" />

<!-- Removes all items from the basket of the logged in user. -->
<Item Text="Remove all from basket" LabelE="" LabelN="" LabelF="" LabelG="" NavigateUrl="Javascript:ClearBasket();" />
</Group>
</Item>

<!-- GenCD handling -->
<!-- ========= -->
<!-- Add selected items to the personal CD list of the logged in user. -->

<Item Text="Add to CD List" LabelE="" LabelN="Toevoegen aan CD" LabelF="Ajouter aux CD" LabelG="" NavigateUrl="Javascript:AddToCDRom();"/>

<!-- Remove selected items to the personal CD list of the logged in user. -->
<Item Text="Remove from CD List" LabelE="" LabelN="Verwijderen uit CD" LabelF="Enlever des CD" LabelG="" NavigateUrl="Javascript:RemoveFromCDRom();" />

<!-- List all items on the CD list of the logged in user. -->
<Item Text="CD-List" LabelE="" LabelN="Cd-List" LabelF="CD-List" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=6',8);" />
```

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```
<!-- Clear the CD list of the logged in user. -->
<Item Text="Remove all from CD List" LabelE="" LAbelN="CD leegmaken" LAbelF="Vider les CD" LabelG="" NavigateUrl="Javascript:ClearCDRom();" />

<!-- Generate the CD list of the logged in user: this will put the entire CD on a share on the server from where the user can pick it up. -->
<Item Text="Generate the CD" LabelE="" LabelN="CD genereren" LabelF="Créer CD" LabelG="" NavigateUrl="Javascript:GenCD();"/>

<!-- View items that match a predefined query -->
<!-- ============================== -->
<Item Text="Predefined queries">
<Group>
<Item Text="All documents" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse',8,0);"/>
<Item Text="Last day" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=4&amp;seldate=>-1',8,0);"/>
<Item Text="Yesterday" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=4&amp;seldate=-1',8,0);"/>
<Item Text="Last week" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=4&amp;seldate=>-7',8,0);"/>
<Item Text="Last month" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=4&amp;seldate=>-31',8,0);"/>

<Item Text="E-Mails" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;object_type=Mail',8,0);"/>

<Item Text="My Work" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:GotoWorkFlowPage('WF_MyWork.asp',4);" />
<Item Text="My Dossiers" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:GotoWorkFlowPage('WF_MyDossiers.asp',5);" />
<Item Text="Open Dossiers" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:GotoWorkFlowPage('WF_OpenDossiers.asp',1);"/>
<Item Text="Archive" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:GotoWorkFlowPage('WF_Archive.asp',6);"/>
<Item Text="Distributions" LabelE="" LabelN="" LabelF="" LabelG="" />
<Item Text="My Distributions" LabelE="" LabelN="" LabelF="" LabelG="" />

<!-- The following links are also available from the treeview -->
<Item Text="My favorite documents" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=3',8,0);" />
<Item Text="My recent documents" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=4',8,0);"/>
<Item Text="Basket" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:Goto('DM_DocumentList.aspx?screenmode=browse&amp;seltype=2',8,0);" />

<!-- View the currently pinned document -->
<Item Text="Pin" LabelE="" LabelN="Pin" LabelF="" LabelG="" NavigateURL="javascript:ShowPin();"/>
</Group>
</Item>


<!-- Search objects -->
<!-- ============================================== -->
<Item Text="Search links">
<Group>
<Item Text="Search" AccessKey="E" >
        <Group Flow="Vertical" OffsetY="0" >
                <Item Text="All" LeftLogo="../images/find.gif" NavigateURL ="Javascript:Goto('DM_DocumentList.aspx?screenmode=query',8,0);" >
```

```
                    <Group Width="140" Flow="Vertical" OffsetX="0" >
                        </Group>
            </Item>

            <Item  Text="Documents" LeftLogo="../images/find.gif" NavigateURL ="Javascript:Goto('DM_DocumentList.aspx?screenmode=query&amp;object_type=Document',8,0);" >
                        <Group Width="140" Flow="Vertical" OffsetX="0" >
                        </Group>
            </Item>
            <Item  Text="Folders" LeftLogo="../images/find.gif" NavigateURL ="Javascript:Goto('DM_DocumentList.aspx?screenmode=query&amp;object_type=Folder',8,0);" >
                        <Group Width="140" Flow="Vertical" OffsetX="0" >
                        </Group>
            </Item>
            <Item  Text="Cases" LeftLogo="../images/find.gif" NavigateURL="Javascript:GotoWorkFlowPage('WF_Search.asp',2);"  >
                        </Item>
        </Group>
</Item>

<!-- Add a link to a specific search screen -->
<Item  Text="All docs easy" LabelE="" LabelN="Algemeen zoeken" LabelF="Recherche globale" LabelG="" LeftLogo="/docroom/TreeIcons/Icons/page.gif" NavigateURL
="Javascript:Goto('DM_DOCUMENTLIST.aspx?DM_SCREEN_ID=2009&amp;screenmode=query',8,0);" />

<!-- Open the default document search screen -->
<Item  Text="All docs std" LabelE="" LabelN="Gedetailleerd zoeken" LabelF="Recherche détaillée" LabelG="" LeftLogo="../images/find.gif" NavigateURL
="Javascript:Goto('DM_DocumentList.aspx?screenmode=query&amp;object_type=Document',8,0);" />

<!-- Open a specific folder search screen -->
<Item  Text="Folder1000" LabelE="" LabelN="Map" LabelF="Répertoire" LabelG="" LeftLogo="/docroom/menuimages/icon_open.gif" NavigateURL
="Javascript:Goto('DM_DOCUMENTLIST.aspx?DM_SCREEN_ID=2002&amp;screenmode=query&amp;object_type=Folder',0,0);" />

<!-- Open the list of my saved queries -->
<Item  Text="Saved queries" LabelE="" LabelN="Documenten" LabelF="" LabelG="" LeftLogo="" NavigateURL
="Javascript:Goto('DM_DocumentList.aspx?screenmode=openquery&amp;object_type=Document',8,0);" Roles="" />
</Group>
</Item>


<!-- User Options -->
<!-- ========= -->
<Item Text="user options">
<Group>
<Item  Text="Open Mail Client" LabelE="" LabelN="" LabelF="" LabelG="" leftlogo="../images/mailbox.gif" NavigateURL="Javascript:Goto('./MailClient/Default.aspx',9,0);"/>
<Item  Text="My Preferences" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:OpenRadWindow('DM_USER_PREFS.aspx','Prefs','RELOAD');"/>
<Item  Text="My Profile" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:GotoWorkFlowPage('WF_MyProfile.asp');"/>
<Item  Text="My Delegates" LabelE="" LabelN="" LabelF="" LabelG="" NavigateURL="Javascript:GotoWorkFlowPage('WF_MyDelegates.asp');"/>
```

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```
<Item  Text="Organise toolbar" LabelE="" LabelN="" LabelF="" LabelG="" NavigateUrl="javascript:Goto('Toolbarconfig.aspx',0);" />
</Group>
</Item>

<!-- Admin Options -->
<!-- =========== -->
<Item Text="Admin options">
<Group>
    <Item Text="Batch Jobs" LabelE="" LabelN="Batch Jobs" LabelF="Batch jobs" AdminOnly="Y" LabelG="" NavigateURL="Javascript:OpenRadWindow('DM_Jobs.aspx','Jobs','RELOAD');"/>
    <Item Text="Action Profiles" LabelE="" LabelN="Actie Profielen" LabelF="Gestion des profils d'actions" LabelG="" AdminOnly="Y"
NavigateUrl="Javascript:OpenRadWindow('dm_action_profiles.aspx','ActionProfiles','RELOAD');"/>
    <Item Text="Template Builder" LabelE="" LabelN="Sjabloon aanmaken" LabelF="" LabelG="" NavigateUrl="javascript:OpenRadWindow('TemplateBuilder.aspx','TemplateBuilder','RELOAD');"
/>
    <Item Text="Manage Lists" LabelE="Manage Lists" LabelN="Lijsten beheren" LabelF="Manage Lists" AdminOnly="Y" LabelG=""
NavigateURL="Javascript:OpenRadWindow('./CatalogMaint/DM_Catalog.aspx','CatMaint','RELOAD');"/>
    <Item Text="Manage Screens" LabelE="Manage Screens" LabelN="Schermen beheren" LabelF="Manage Screens" AdminOnly="Y" LabelG=""
NavigateURL="Javascript:OpenRadWindow('./TemplateBuilder/TB_List.aspx','Screens','RELOAD');"/>
    <Item Text="Reload environment" LabelE="" LabelN="Omgevingsvariabelen herladen" LabelF="Rafraichir environement" AdminOnly="Y" LabelG=""
NavigateURL="Javascript:OpenNormalWindow('DM_ClearCache.aspx','Clear');"/>

    <Item IsSeparator="True" AdminOnly="Y" />
    <Item Text="User management" LabelE="" LabelN="User management" LabelF="User management" AdminOnly="" LabelG=""
NavigateURL="Javascript:OpenRadWindow('UserBrowser/dm_userbrowser.Aspx','Jobs','RELOAD');"/>
    <Item Text="Batch Update" LabelE="" LabelN="Selectie van documenten aanpassen" LabelF="Mettre à jour les documents en lot" LabelG=""
NavigateUrl="Javascript:OpenNormalWindow('BatchUpdate.aspx','BatchUpdate');"/>
    <Item Text="Generate URL's" LabelE="" LabelN="Genereer URL's" LabelF="Création des hyperliens" LabelG="" NavigateURL="Javascript:Goto('./apps/admin.asp?docs=' +
GetRadPane(listPaneID).GetSelection(),8)"/>
    <Item Text="Generate saved query URL's" LabelE="" LabelN="Genereer URL's naar bewaarde zoekopdrachten" LabelF="Création des hyperliens vers des recherches sauvegardées"
LabelG="" NavigateURL="Javascript:Goto('./apps/admin_query.asp?docs=' + GetRadPane(listPaneID).GetSelection(),8)"/>

    <Item IsSeparator="True" AdminOnly="Y" />
    <Item Text="File Extensions" LabelE="" LabelN="Bestandsextensies" AdminOnly="Y" LabelF="Gestion des extensions" LabelG=""
NavigateURL="Javascript:OpenRadWindow('DM_FILETYPES.aspx','FileExt','RELOAD');"/>
    <Item Text="File Servers" LabelE="" LabelN="Bestandsservers" LabelF="Gestion des serveurs de fichier" LabelG="" AdminOnly="Y"
NavigateUrl="Javascript:OpenRadWindow('dm_fileservers.aspx','FileServers','RELOAD');"/>
    <Item Text="IFilters" NavigateUrl="Javascript:OpenRadWindow('DM_IFILTERS.aspx','IFILTERS','RELOAD');" AdminOnly="Y"/>
    <Item Text="Administration" LabelE="" LabelN="Administratie" LabelF="" LabelG="" NavigateURL="Javascript:GotoWorkFlowPage('WF_Admin.asp');" AdminOnly="Y"/>

    <Item IsSeparator="True" AdminOnly="Y" />
    <Item Text="Versions" NavigateUrl="Javascript:OpenRadWindow('DM_ABOUT.aspx','Versions','RELOAD');" AdminOnly="Y"/>

</Group>
</Item>
```

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```
<!--
Grouping your menu structure
======================
To group a number of items together use the group element.
<Group Flow="Horizontal/Vertical">
</Group>
In a group element, different item elements can be added.
In an item element, different group elemens can be added.
an item can contain the following parameters:
        Text                   : Name of the item
        LabelE                 : English label for the item
        LabelN                 : Dutchlabel for the item
        LabelF                 : Frenchlabel for the item
        LabelG                 : German label for the item
        NavigateURL            : Javascript to be executed when clicking on the link
        leftlogo               : image to be added before the label of the item


-->
<!--
General ways to open pages from the menu:
===============================
- open a workflow pagina: "Javascript:GotoWorkFlowPage('WF_Search.asp',2)"
        param 1 : page to be opened
        param 2 : ??

- open a generic page: "javascript:Goto('Toolbarconfig.aspx',0,0);"
        param 1 : page to be opened
        param 2 : ??
        param 3 : page mode.
                0 = MDI This means that the page will open in the main frame
                1 = SDI This means that the page will open in a popup window

- open a generic page in a RAD Window: "javascript:OpenRadWindow('TemplateBuilder.aspx','TemplateBuilder','RELOAD');"
        param 1 : page to be opened
        param 2 : Name of the page
        param 3 : page mode
                RELOAD = ??
                ...???

Goto('page.aspx?docs=' + GetRadPane(listPaneID).GetSelection())
-->
</Group>
</Menu>
```

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2.5 Result grid definition

All the grids that are shown in docroom can be configured. At least the DefaultResultGrid.xml for docroom and the CaseGrid.xml for routing must be present in the site folder.

The result list consists of different parts, which can be configured by an administrator:
- Search criteria: the user can choose to see the search criteria of the active search on the result screen.
- Column headers: these headers contain the title of the columns that are shown in the result list. When clicking on the headers, the result list is sorted on the values that exist in this folder. When clicking a second time the sort order is inverted.
- Filters: after the execution of a user search or when browsing through folders, a user can refine the results in the list by filtering on the data that exists in a column. The format of the data in the column is followed, this means that a user can use operators such as >, < when filtering f.i. on a date column.
- Results: the hits from a search or browse operation are shown in the list. Different columns can be shown in this list depending on the active configuration. When clicking on a result, the preview of this result can be shown in the preview window. When right-clicking the result, a list of available actions is shown in the context menu. This way the user can access often executed document actions. Available columns are:
  - Link to me: allows users to link all selected (check boxes checked) to this document.
  - Read: indicates whether or not a user has already read the document (either file or metadata).
  - Status: indicates which status the document has
    - Production: the document is availble
    - Locked: a user is editing the document
    - Checked out: a user has checked out the document
  - Multiselect: this column shows a check box that allows a user to select multiple documents at once and perform an action from the menu on them.
  - Expand: open or closes the list of attached files.
  - Version: This column shows the version number of document.
  - Objecttype: This columns shows the object type of the item in the list (document, folder, caseobject)
  - Category: The category of the document in the result list is shown in this column. This can be used to filter the results in the list.
  - Creationdate: date of creation of the document
  - Documentlinks: a link to the main file of a document can be shown in the result list. This column contains a link to the original version of the file, the renditions that are available for this document and if allowed, a link that allows a user to directly edit a document (=lock a file for editing).
  - Basket: shows the basket icon in the result list. Via the link that is availble in this column a user can see whether a document is already selected in his basket. He can also select or deselect the document from his basket.
  - Favorites: shows the favorites icon in the result list. Via the link that is availble in this column a user can see whether a document is already selected in his favorites. He can also select or deselect the document from his favorites.
  - CD Rom: column where the user can toggle whether or not the item should be saved to his CD List. The user can just click the column to add or remove (toggle) the item from or to the cd list. No further action required.
  - Comments: A link that redirects the user to the comments page of the document is available in this column.
  - Links: shows a link to load all linked objects for the current object.

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- o <u>Previousversions</u>: shows a link to load all previous versions for the current object.
- o <u>Procedure</u>: Name of the workflow procedure that is followed by the object in the list.
- o <u>Title</u>: this column contains the name of the item in the list.
- o <u>Case End Date</u>: Shows the date at which the Case object was ended.
- o <u>Step</u>: Name of the current step of the workflow procedure in which the object in the list is sitting.
- o <u>Worklist</u>: shows the work for the workflow case in the list.
- o <u>Created by</u>: shows the user who created the item in the list.
- o <u>Stepdate</u>: the date the item entered in the current step of the workflow.
- o <u>Duedate</u>: Shows the next due date for the item in the list (either step or case due date depending on which one happens first).
- o <u>Case due date</u>: Due date of the entire procedure that has to be followed by the item in the list.
- o <u>Step due date</u>: step due date of the item in the list.
- o <u>Deadline icon</u>: icon representing the due date status of the item in the list (whether or not it is already overdue, due today, due the following days or has no due date at all).
- o <u>Pin</u>: if a user wants to link documents, he has to indicate to which document he wants to link other documents. The pin column allows a user to identify the document to which other documents will be linked.
- o <u>Relevance</u>: when performing a search the relevance of the document according to the search criteria is shown in this column (the value is shown as a percentage, 100% being the most relevant, 0% the least relevant). When browsing through the folders, all documents receive a relevance of 100%.
- o <u>Checkoustart</u>: start date of the current checkout action on the document (is only filled when the document is checked out)
- o <u>Checkoutend</u>: end date of the current checkout action on the document (is only filled when the document is checked out)
- o <u>Checkoutby</u>: person who has the document checked out
- o <u>Checkoutcomment</u>: comment that was entered when checking out a document
- o <u>Checkincomment</u>: comment that was entered when checking in a document.
- o <u>Linktype</u>: the type of link that exists between documents (only available in the linked objects list).
- o <u>Property</u>: any given property that is defined in docroom can be shown in the result list.
- o <u>Constant</u>: any constant you want to add to the list.
- o <u>Folder</u>: folder in which the item in the list is sitting.
- o <u>Mainfile</u>: a link to the main file of a document can be shown in the result list. This column contains a link to the original version of the file, the renditions that are available for this document and if allowed, a link that allows a user to directly edit a document (=lock a file for editing).
- o <u>Rank</u>: sequential number of the result in the result list
- o <u>Icon</u>: shows the category icon of the item in the list.
- o <u>Dragdrop</u>: this column shows the icon of the document category. On hover the name of the document category is shown. This icon can be used to move a document to a different folder.
- o <u>Name</u>: this column contains the name of the item in the list.
- o <u>Modified by</u>: Name of the last person who has modified the item in the list.
- o <u>Modification date</u>: date of last modification of the item in the list.

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- o <u>Din</u>: shows the Document Identification Number
- o <u>Restore link</u>: link to restore a delete item (only available in the recycle bin grid).
- o <u>Delete link</u>: link to allow the deletion of the item in the list.
- o <u>Link to routing</u>: icon used to allow user to link a document to the current case they are working on.
- o <u>Thumbnail</u>: shows a thumbnail for the main file of the document.
- o <u>Abstract</u>: shows the abstract of the main file.
- o <u>Keywords</u>: shows the keywords of the main file.
- o <u>Listinfo/Listinfo1/Listinfo2/Listinfo3</u>: generalisation fields that can be shown especially on general result lists. These fields can contain specific information for specific categories but show this information in the same column instead of showing properties in the result lists that are not filled for items which do not use this property.
- o <u>Mail subject</u>: (mail lists only) shows the subject of the archived mail.
- o <u>Mail To</u>: (mail lists only) shows the recipient of the archived mail.
- o <u>Mail From</u>: (mail lists only) shows the Sender archived mail.
- o <u>Mail CC</u>: (mail lists only) shows the CC content of the archived mail.
- o <u>Mail Date</u>: (mail lists only) shows the date of the archived mail.
- o <u>Priority</u>: Shows the (workflow) priority of the item.
- o <u>History</u>: Shows the history (workflow or objects) of the item.
- o <u>Custom</u>: allows the user to add his own column (f.i. containing custom javascripts).

```xml
<?xml version="1.0" encoding="utf-8" ?>
<!-- This file describes the default docroom result list. This file can be found in the DocRoom/Sites/Default directory. -->
<screendef xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="..\Xsd\Grid.xsd">
        <mode>1</mode>
    <!--     mode:
                        = 0 : thumbnail view
                        = 1 : listview
     -->
        <ImageListColumnCount>2</ImageListColumnCount>
    <!--     ImageListColumnCount: number of columns when in thumbnail view. -->
        <ImageListOrientation>0</ImageListOrientation>
    <!--     ImageListOrientation:
                        = 0 : Metadata next to the thumbnails (thumbnail view only)
                        = 1 : Metadata below the thumbnails (thumbnail view only)
     -->
        <DefaultOrderBy>OBJ_UNAME ASC</DefaultOrderBy>
    <!--     DefaultOrderBy: this is the default sort criteria that is used for result screens. When left blanc, no sort order is used. A sort on the object type (document, folder, mail) will always
be performed. When performing a fulltext query when this criteria is left blanc, no sort criteria is used in the search. -->
        <DefaultFileOrderBy></DefaultFileOrderBy>
```

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```
<!--        DefaultFileOrderBy: this is the default sort criteria that is used to order the filelist of every document in the result list. -->
<KeepSearchScreenVisible>false</KeepSearchScreenVisible>
<!--        KeepSearchScreenVisible: whether or not to keep the search screen visible on the resultpage. -->
<FolderText>false</FolderText>
<!--        FolderText: whether or not to show the folder text screen of the current folder on the resultpage. -->
<FiltersFile></FiltersFile>
<!--        FiltersFile: name of the xml filter definition file to be used when using this result list definition file. -->
<GroupingFile>Grouping.xml</GroupingFile>
<!--        GroupingFile: name of the xml grouping definition file to be used when using this result list definition file. -->
<ToolbarFile>GridToolbar.xml</ToolbarFile>
<!--        ToolbarFile: name of the xml toolbar definition file to be used when using this result list definition file. -->
<ForceJoinOnDMObject>Grouping.xml</ForceJoinOnDMObject>
<!--        ForceJoinOnDMObject: If the resultlist is a file result list but you want to use document groupers, this parameter should be set to true to include the document (dm_object)
properties. -->
<ShowSearchedFor>True/False</ShowSearchedFor>
<!--        ShowSearchedFor: Indicate whether or not the search criteria should be shown in the grouping pane of the result grid. -->
<ShowQueries> True/False </ShowQueries>
<!--        ShowQueries: Indicate whether the saved queries for the user should be shown in the grouping pane of the result grid. -->
<AllowOrderBy>true</AllowOrderBy>
<!--        AllowOrderBy: Indicate whether or not the grid can be ordered by clicking on the column header. -->
<ShowFilters>true</ShowFilters>
<!--        ShowFilters: Indicate whether or not the filters should be shown. -->
<ShowScroller>true</ShowScroller>
<!--        ShowScroller: Indicate whether or not the scroller should be shown at the bottom. -->
<ShowSideBar>true</ShowSideBar>
<!--        ShowSideBar: Indicate whether or not the sidebar should be shown. -->
<HeaderContextMenus>true</HeaderContextMenus>
<!--        HeaderContextMenus: Indicate whether or not the header context menu's should be available. -->
<ItemContextMenus>true</ItemContextMenus>
<!--        ItemContextMenus: Indicate whether or not the context menu for the items in the list should be available. -->
<columns>
<!--        This section describes how the columns/headers/filters of the result list will look like.
            For every column, a column element is added.
            Parameters:
                - name="": This parameter contains the name of the column. Available options are (see above for the description):
                    -    "linktome"
                    -    "read"
                    -    "status"
                    -    "multiselect"
                    -    "expand"
                    -    "version"
                    -    "custom"
                    -    "objecttype"
```

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- "category"
- "creationdate"
- "documentlinks"
- "basket"
- "favorites"
- "cdrom"
- "comments"
- "links"
- "previousversions"
- "procedure"
- "title"
- "caseenddate"
- "step"
- "worklist"
- "createdby"
- "stepdate"
- "duedate"
- "caseduedate"
- "stepduedate"
- "deadlineicon"
- "pin"
- "relevance"
- "checkoutstart"
- "checkoutend"
- "checkoutby"
- "checkoutcomment"
- "checkincomment"
- "linktype"
- "property"
- "constant"
- "folder"
- "mainfile"
- "rank"
- "icon"
- "dragdrop"
- "name"
- "modifby"
- "modificationdate"
- "din"
- "restorelink"
- "deletelink"

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- "linktorouting"
- "thumbnail"
- "abstract"
- "keywords"
- "listinfo"
- "listinfo1"
- "listinfo2"
- "listinfo3"
- "mailsubject"
- "mailto"
- "mailfrom"
- "mailcc"
- "mailbcc"
- "maildate"
- "priority"
- assembly=""   :
- class=""   :
- chars="xx"   : number of characters that has to be shown in the column (rest of the characters is replaced by '…', on hover the entire value is shown.
- extra=""   : extra HTML markup for the column (e.g. NOWRAP)
- labelE=""   : English label for the column in the resultgrid.
- labelN=""   : Dutch label for the column in the resultgrid.
- labelF=""   : French label for the column in the resultgrid.
- filterwidth=""   : number of pixels for textboxes (use f.i. "100px"), number of characters for dropdown fields (use f.i. "25")
- size="xx"   : numeric value that describes the width of the column. Can be expressed in pixels or in percentage. Ex.: size="10px" or size="10%". There should be no mix between percentages and pixels.
- hidefilter=""   :
  - "y": do not show a filter for this column
  - "n": show a filter for this column
- ShowToolTip=""   : for the documentlinks and status columns (0/1 to show or not to show the tooltip)
- colspan="": number of columns for the colspan (especially for the rows)
- activatelink="true/false": This paramater is only valid for a column with name="folder"
  - "y": when you click on the folder, this folder will be loaded in the result list
  - "n": when you click on the folder, this folder will NOT be loaded in the result list
- hidden="true/false"   : show the column by default or hide it (this setting can be overwritten on a user level)
- fixed="true/false" : If set to true, the column cannot be hidden by the user.

Example columns:
     -->

```
<column name="expand"></column>
<column name="pin"></column>
<column name="status"></column>
<column name="dragdrop"></column>
<column name="multiselect"></column>
```

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```
        <column name="relevance"></column>
        <column name="version"></column>
        <column name="info"></column>
        <column name="title" ></column>
        <column name="category" size="100" hidefilter="n"></column>
        <column name="creationdate"></column>
        <column name="documentlinks" size="80"></column>
        <column name="basket"></column>
        <column name="favorites"></column>
        <column name="comments"></column>
        <column name="thumbnail" size="200"></column>
        <column name="links"></column>
        <column name="previousversions"></column>
        <column name="property" value="property van doctype1" size="200"></column>
        <column name="checkoutstart"></column>
        <column name="checkoutend"></column>
        <column name="checkoutby"></column>
        <column name="checkoutcomment"></column>
        <column name="checkincomment"></column>

    </columns>
    <rows>
<!-- Multiple rows can be shown for every result in the result list. In this section these rows are defined. For every row, a row section is added. -->
        <row>
<!-- This section describes how the columns of this row will look like.
For every column, a column element is added. See above for the description of a column element.
            <columns>
            <column name="constant" colspan="1"/>
            <column name="constant" colspan="4" size="100"><b>Folder : </b></column>
            <column name="folder" colspan="10" size="200" activatelink="y"></column>
            </columns>
        </row>
        <row>

            <columns>
            <column name="constant" colspan="1"/>
            <column name="constant" colspan="4" size="100"><b>abstract : </b></column>
            <column name="abstract" colspan="10" size="200"></column>
            <column name="keyword" colspan="10" size="200"></column>
            </columns>
        </row>
    </rows>
</screendef>
```

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A number of result lists have their own configuration file:
- When clicking on a folder the <u>BrowseGrid.xml</u> is used.
- When viewing the linked documents, the <u>LinkedDocsGrid.xml</u> is used.
- When clicking on the My Checked out folder, the <u>MyCheckedOutDocsGrid.xml</u> file is used.
- When clicking on the previous versions tab, the <u>PreviousVersionsGrid.xml</u> is used.
- When opening the recycle bin, the <u>RecycleBinGrid.xml</u> file is used to show the results.
- When performing a search, the <u>SearchResultGrid.xml</u> file is used to show the results.
- When clicking on the What's new link, the <u>WhatsNewGrid.xml</u> file is used.

If no file is specified, the DefaultResultGrid will be used. Each configuration file follows the same configuration rules as the DefaultResultGrid.xml.

2.6   GridToolbar definitions

For every gridfile, a toolbar definition file can be linked. In the Grid Toolbar file, the buttons that will appear for this grid have to be defined. If none is defined, the **DefaultGridToolbar.xml** file will be used. This file should never be removed.

```xml
<?xml version="1.0" encoding="iso-8859-1" ?>
<!-- This file describes the buttons shown in the toolbar of a result grid. -->
<Toolbar enabled="true" xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="..\Xsd\GridToolbar.xsd">
<!-- enabled="true/false"       : indicates whether the toolbar is enabled or not. -->
        <Item Text="What's new" LabelE="" LabelN="Nieuwe items" LabelF="Quoi de neuf" LabelG="Neuigkeiten" ImageUrl="~/Images/myNewDocuments.png"
        NavigateUrl="javascript:#GRID#.ToggleWhatsNew();" ToggleOnMultiSelect="false" ToggleOnCaseMultiSelect="false" isSeparator="false" ShowText="false"
        isCustomActionPlaceHolder="false" RequiredFolderAcl="" Roles=""/>
                <!-- A number of buttons can be defined for a result gridin a result page:
        o   Text: Default label for this button, this will be shown if no image and no user language label is available in the button definition.
        o   LabelE: English label for the button
        o   LabelN: Dutch label for the button
        o   LabelF: French label for the button
        o   LabelG: German label for the button
        o   ImageUrl: URL for the button image
        o   NavigateUrl: URL or javascript to be executed when clicking on the button
                ▪   javascript:#GRID#.ToggleWhatsNew(); met #GRID# = PageController().GetCurrentResultGrid()
                ▪   Javascript:#GRID#.AddToSelection(x);
                        •   with x:
                        •   Current = 1 : internally used: stores the userselection just before executing a system action
                        •   Basket = 2
```

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- Favorites = 3
- Recent = 4
- OIP = 5
- CDRom = 6
- UserCurrent = 7 : select a number of records and user clicks to save selection in the grid
- Read = 11
- CurrentCases = 8
  - Cases:
    - Custom = 1 'todo
    - Unlock = 2
    - Release = 3
    - Suspend = 4
    - UnSuspend = 5
    - FinishCase = 6
    - DeleteCase = 7
    - OpenAndKeep = 8
- javascript:#GRID#.Reload();
- javascript:#GRID#.ToggleWhatsNew();
- javascript:#GRID#.ToggleHideDelegated();
- javascript:#GRID#.ToggleShowLocked();
- javascript:#GRID#.ToggleShowSuspended();
- javascript:#GRID#.PrintCaseGridToExcel('resultgrid');
  - resultgrid can be any existing result grid (gridname.xml) or 'auto'. Auto means that one sheet will be created for each category/procedure and that for every tab all printable fields will be added to the excel sheet.
- javascript:#GRID#.MailSelection();
- Javascript:PageController().OpenWindow('url', 'windowname');
- javascript:#GRID#.DoDocumentListAction(`actiontype,actionid`);
  - with actiontype:
  - Undefined = 0
  - Custom = 1
  - CreateZip = 2
  - LinkDocuments = 3
  - DeleteDocuments = 4
  - CreatePDF = 6
  - With actionid:
  - = custom action id if actiontype = 1 (custom)
- javascript:#GRID#.DoCaseListAction(actiontype, actionid);
  - With actiontype:
  - Custom = 1
  - Unlock = 2
  - Release = 3
  - Suspend = 4

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- UnSuspend = 5
- FinishCase = 6
- DeleteCase = 7
- OpenAndKeep = 8
- RecalculateWork = 9
- <u>With actionid:</u>
- = custom action id if actiontype = 1 (custom)

  - javascript:#GRID#.DoMailListAction(actiontype, actionid);
    - <u>With actiontype</u>:
    - Undefined = 0
    - Delete = 4
    - Restore = 5
    - MarkRead = 6
    - MarkUnRead = 7
    - <u>With actionid:</u>
    - = 0

  - javascript:#GRID#.DoMailBoxAction(actiontype, actionid,boxid);
    - <u>With actiontype</u>:
    - Undefined = 0
    - Delete = 4
    - Restore = 5
    - MarkRead = 6
    - MarkUnRead = 7
    - <u>With actionid:</u>
    - = 0
    - <u>With boxid:</u>
    - 1 = inbox
    - 2 = outbox

  o <u>ToggleOnMultiSelect (true/false)</u>: when set to true the button will only be available (actif) if a docroom object is checked in the result list for which the toolbar is defined. If set to false (=default) the button will allways be available.
  o <u>ToggleOnCaseMultiSelect (true/false)</u>: when set to true the button will only be available (actif) if a routing case is checked in the result list for which the toolbar is defined. If set to false (=default) the button will allways be available.
  o <u>isSeparator (true/false)</u>:
  o <u>ShowText (true/false)</u>: Indicates whether the Text element (or the user language label if available) should be shown in the toolbar.
  o <u>isCustomActionPlaceHolder (true/false)</u>: when set to true, this button will serve as a drop down list for all available custom actions (can only be used once)
  o <u>RequiredFolderAcl</u>: Minimum rights you need on a folder to see the button in the toolbar
  o <u>Roles</u>: comma separated string of role names for which the button is shown

</Toolbar>

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2.7   File result grids

The file result grids define the fields that are shown in file result lists in docroom. We distinguish the following three:

- ListFileGrid.xml: contains the configuration of the attachments in document result grids
- ListMainFileGrid.xml: contains the configuration of the attachments in document result grids
- DetailFileGrid.xml: contains the configuration of the file list in object detail windows

```xml
<?xml version="1.0" encoding="utf-8" ?>
<!-- This file describes the file list composition in the document result lists. This file can be found in the DocRoom/Sites/Default directory. -->
<screendef xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:noNamespaceSchemaLocation="..\Xsd\FileGrid.xsd">
        <OrderBy>
        <!--      add the database column names and the sort order in this section. Ex: FILE_TITLE asc -->
        </OrderBy>
        <columns>
        <!--      This section describes how the columns of the file grid will look like.
                  For every column, a column element is added.
                  Parameters:
                        - name="": This parameter contains the name of the column. Available options are:
                                - "status"   :
                                - "icon"              :
                                - "iconpreview"                   :  shows the preview mode of the file instead of the original format (=column 'icon')
                                - "language"                :
                                - "title"           :
                                - "author"          :
                                - "date"            :
                                - "id"                    :
                                - "fin"                   :
                                - "renditions"            :
                                - "thumbnail"             :
                                - "index"          : index (full text) view of the document
        -->
                <column name="status"></column>
                <column name="icon"></column>
                <column name="iconpreview"></column>
                <column name="language"></column>
                <column name="title"></column>
```

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```
                <column name="author"></column>
                <column name="date"></column>
                <column name="id"></column>
                <column name="fin"></column>
                <column name="renditions"></column>
                <column name="thumbnail"></column>
                <column name="index"></column>
            </columns>
</screendef>
```

2.8   Grouping

When querying the database, different docroom fields can be used to group the results in subsets for overview and quick browsing. In this file the list of fields that are made available for grouping are configured.

```
<?xml version="1.0" encoding="utf-8" ?>
<!-- This file describes the grouping capabilities of docroom that can be used by the end user in a specific site. -->
<grouping enabled="y" width="200px" height="100%" >
<!-- enabled="y/n"   : can grouping be used in DocRoom. -->
<!-- width="200px"   : width of the groupers defined in the result screen. -->
<!-- height="100%"  : default height of the groupers defined in the result screen. -->
        <grouper id="1" hideicons="true" usergrouper="false" applyfiltertogrouper="true" LabelE="Type document" LabelN="Type document" LabelF="Type document"
        LabelG="Type document" linktogrouper="0" height="200px" showinsearchscreen="true" defaultenabled="true" >
        <!-- A number of groupers can be defined in a result page. A grouper can have one or more levels, defined by the fields for the grouper.
        Parameters that have to be entered on the grouper level:
            o    id: numeric indicator that identifies the grouper, can be chosen but should be unique across the groupers in the file
            o    hideicons: true/false ➔ when true an icon is shown for every item in the list, when false the icons are not shown.
            o    usergrouper: true/false ➔ when true, the user can activate the grouper by right clicking the header of the result list. When false, the grouper is always shown.
            o    applyfiltertogrouper: true/false ➔ when true, the grouper will be refreshed after every activation of a grouper (also a selection in other groupers). This means that only the values
                 that are available in the current result set are shown. When false, the grouper will keep the selections from the original query, independent of values activated in the current or
                 other groupers.
            o    labelE/F/N/G: labels of the grouper
            o    linktogrouper: if a grouper only has to be shown after a selection was made in another grouper, you can enter the id of the other grouper in this field. Set it to 0 if this is not
                 required (grouper will allways be shown).
            o    height: per grouper the height he will occupy in the screen can be configured.
            o    showinsearchscreen: if set to true, the grouper will be shown in the query screen (if you want to show the grouper in the search screen, both showinsearchscreen and
                 usergrouper should be set to true. If usergrouper is set to false, this parameter is ignored.
            o    defaultenabled: if set to true, the grouper in the search screen will be checked, if set to false the grouper will not be checked
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```
-->
            <field value="OBJ_TYPE"  formatter=""/>
<!-- One or more fields can configured per grouper.  If more than one field is configured, the grouper will be shown as a tree structure.
Basically all columns in the dm_object table can be used as a field (=standard fields + searchable properties can be used)

For every element the following parameters exist:
        ▪    value="" : The column on which the grouper is based
        ▪    labelE/F/N/G: labels of the grouper
        ▪    formatter: specify how the values should be rendered in the list
             •    user:
             •    date: formats dates en datetimes as dates in the doma format
             •    priority: shows priority as text instead of numbers

A number of standard columns are also interpreted by the grouping functionality:
- OBJ_TYPE: shows the object type of the object
- CAT_ID: shows the category name of the object (based upon the cat_id of the object)
- PARENT_OBJ_ID: shows the entire folderstructure of the document
- PROC_ID: grouped per procedure, the translated label of the procedure will be shown
- STEP_ID: grouped per step, the translated label of the step will be shown
- WORK: shows a grouper on the work list, use it in combination with the 'user' formatter.
- CASE_PRIORITY: shows a grouper on the priorities in the cases, use it in combination with the 'priority' formatter.


-->
</grouping>
```

2.9   Filters

```
<?xml version="1.0" encoding="utf-8" ?>
<!-- This file describes the filter capabilities of docroom that can be used by the end user in a specific site. -->
<filters>
        <!--
        Different filters can be configured. For every filter, following options are available:
 Basically all columns in the dm_object table can be used to group on. This means that only searchable properties can be used to group on.

        For every element the following parameters exist:
        - index=""
                The sequence number of the filter, can be chosen, should be unique for every filter.
        - name=""
                The name of the filter, can be chosen, should be unique for every filter. The name will be shown if no language specific label is entered.
```

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```
              - nameE=""          : english label for this property
              - nameN=""          : dutch label for this property
              - nameF=""          : french label for this property
              - nameG=""          : german label for this property


              - autopostback="true/false"
                      If autopostback =true, a refresh of the result page will be triggered when changing the value of the filter.
              - role=""
                      Comma separated list of roles for which the role should be available/applied
              - reversefilterwhennotinrole="true/false"
                      A filter can have a value when applied and a different value when not applied (for instance filter for all validated documents, active can mean show only          the validated
documents, inactive could mean show all documents but could also mean only show the unvalidated documents).
                      A filter can be made available only for a number of roles.
                      This parameter specifies how the filter should behave if I'm not in one of the roles: should the inactive filter be applied for me (value=true)
                      or should the filter not be used at all (value=false).
              - enabled="true/false"
                      This is the default mode of the filter (true➜active part of the filter will be executed, false ➜ inactive part will be used by default)
              - value=""
                      Definition of the active part of the filter. Every column of the dm_object table can be used.
              - disabledvalue=""
                      Definition of the inactive part of the filter. Every column of the dm_object table can be used. Can be left blanc.
              - visible="true/false"
                      Whether or not the filter should be shown in the interface. If set to false, the default mode of the filter will always be applied. The user will not be able to
                      chagne the filter mode (activate/desactivate).
Example:
<filters>
       <filter index="1"  name="Enkel Documenten" nameE="" nameN="" nameF="" nameG="" autopostback="True"  role="" reversefilterwhennotinrole="true"
       enabled="false" value="OBJ_TYPE='Document'" disabledvalue="" visible="True"></filter>
</filters>
```

2.10   Object tooltip

The information that is shown in the tooltip window for an object can be configured. There is one default configuration that is used when no specific (category linked) template exists. Users also have the possibility to create category specific tooltips.This can be done in the DocRoom template builder.

```
<?xml version="1.0" encoding="utf-8" ?>
<!-- This file describes the default docroom object tooltip that appears can appear in the result grid and the detail page of an object. This file can be found in the DocRoom/Sites/Default directory. -->
<items>
<!-- available items on the tooltip window are:
              - name="": This parameter contains the name of the information that has to be shown in the tooltip window
                      - type                : shows the type of object (Folder, Document, Mail, Case)
```

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```
                    - title              : title of the object
                    - din                : DIN of the object
                    - id                 : ID of the object
                    - version            : version of the object
                    - folder             : entire folderstructure of the folder in which the object resides
                    - doccount           : (Folder only) Number of documents
                    - creationdate       : creationdate of the object
                    - createdby          : user who created the object
                    - modifdate          : date the object was last modified
                    - modifby            : user who last modified the object
                    - status             : status of the object
                    - totalfilesize      : sum of the filesize of all attached files for a document, sum of all contained files for a folder
                    - property : show the value of a property in the tooltip
                            - value="" : name of the property to show
                            - labelE=""          : english label for this property
                            - labelN=""          : english label for this property
                            - labelF=""          : english label for this property
                            - labelG=""          : english label for this property

-->
 <item name="type"></item>
 <item name="title"></item>
 <item name="din"></item>
 <item name="id"></item>
 <item name="version"></item>
 <item name="folder"></item>
 <item name="doccount"></item>
 <item name="creationdate"></item>
 <item name="createdby"></item>
 <item name="modifdate"></item>
 <item name="modifby"></item>
 <item name="status"></item>
 <item name="totalfilesize"></item>
 <item name="property" value="String in Pool" labelE="property" labelN="property" labelF="property"></item>
</items>
```

2.11   ContextMenus.xml

By default a number of actions are shown in the context menu of objects. If necessary the items in the context menu can be limited through the configuration of the ContextMenus.xml file.

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```
<?xml version="1.0" encoding="utf-8" ?>
<contextmenus>
  <treecontextmenu>
  <!—the tree context menu element contains the disabled context menu items for the tree structure. This element contains the general restrictions. To limit the disabled menu items to a specific
category, create an element with the name treecontextmenu _XXXX with XXXX the id of the category for which the settings apply -->
    <disableditems>
            <!—Disabled items: add an item element for every context menu item that should not be available. Possible values for the item elements are:
            -    For folders and folder shortcuts:
                        o    add
                        o    browse
                        o    search
                        o    explore
                        o    open
                        o    expandall
                        o    addpropexp
                        o    cut
                        o    copy
                        o    paste
                        o    rename
                        o    edit
                        o    delete
                        o    subscribe
                        o    info
            -    For cases
                        o    open
                        o    cut
            -    For documents
                        o    open
                        o    cut
                        o    copy
                        o    rename
                        o    edit
                        o    delete
                        o    info
            -    For all
                        o    Acl

-->

            <item>add</item>
    </disableditems>
  </treecontextmenu>
  <treecontextmenu_1012>
  </treecontextmenu_1012>
```

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<objectcontextmenu>
 <!—the object context menu element contains the disabled context menu items for the result grids. This element contains the general restrictions. To limit the disabled menu items to a specific category, create an element with the name objectcontextmenu _XXXX with XXXX the id of the category for which the settings apply -->
  <disableditems>
       <!—Disabled items: add an item element for every context menu item that should not be available. Possible values for the item elements are:
    - Allways visible:
        o   name
        o   preview
    -
    - For document objects
        o   preview
        o   rename
        o   edit
        o   restore
        o   delete
        o   checkout
        o   checkin
        o   cancelcheckout
        o   adminCheckin
        o   unlock
        o   addfile
        o   pastefile
        o   sendmail
        o   ViewMail
        o   ViewFileVersions
        o   acl
    - For shortcuts
        o   add
        o   browse
        o   search
        o   Explore
        o   open
        o   rename
        o   delete
        o   viewmail
    - For Cases
        o   delete
        o   acl
    -
    - For folders:
        o   add
        o   browse

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```
                              o    search
                              o    Explore
                              o    open
                              o    unlock
                              o    rename
                              o    edit
                              o    delete
                              o    subscribe
                              o    acl
                              o    restore
                              o    delete
                   -    For mail shortcuts
                              o    download
                              o    delete
                              o    copy
                              o    cut
                              o    sendmail
                   -    Other
                              o    Idx
                              o    usrevent_x : with x the id of the user event
                              o    cust_x : with x the id of the user event
-->
              <item>preview</item>
        </disableditems>
   </objectcontextmenu>

   <objectcontextmenu_1012>
      <disableditems>
        <item></item>
      </disableditems>
   </objectcontextmenu_1012>

   <filecontextmenu>
   <!—the file context menu element contains the disabled context menu items for files. This element contains the general restrictions. To limit the disabled menu items to a specific category, create
an element with the name filecontextmenu _XXXX with XXXX the id of the category for which the settings apply -->
      <disableditems>
           <!—Disabled items: add an item element for every context menu item that should not be available. Possible values for the item elements are:
                   -    name
                   -    download
                   -    edit
                   -    replace
                   -    checkout
                   -    Checkin
```

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```
                    -    cancelcheckout
                    -    collect
                    -    delete
                    -    copy
                    -    cut
                    -    rename
                    -    publishing
                    -    setmainfile
                    -    cust_1
→
            <item>name</item>
    </disableditems>
  </filecontextmenu>
  <filecontextmenu_1012>
  </filecontextmenu_1012>

</contextmenus>
```

2.12   Preview window (PreviewTabs.xml)

This file allows the customisation of the tabstructure that appears in the preview window of an object.

```
<?xml version="1.0" encoding="iso-8859-1" ?>
<PreviewPanes>
        <documentGeneral>
            <!--      Different tabs can be used in the preview window.
                      By default the following tabs are foreseen for documents:
                              - Preview: shows a preview of the main file that is attached to a document.
                              - Details: shows a preview of the meta data and the comments of a document.
                              - Links: shows all linked objects of the selected document
                              - Comments: This tab gives an overview of all comments that were entered for this document
                              - Version history: an overview of the version history of a document can be seen on this tab
                              - History: an overview of actions that were executed on the object can be seen on this tab
                      An integrator can always add more pages to this tab structure. The individual pages must be designed as detail pages of a single master page.
                      As a parameter, the object_id of the current object is sent as a parameter to the webpage that feeds the tab window.

                      If no tabs are specified, by default the metadata of the selected document will be seen in the preview window.
                      Every tab element has an optional parameter 'IsDefault' (true|false): this parameter indicates which tab will be selected by default.
                      After modifying this file, an IISReset is necessary to activate the changes

                      For every tab, the following elements exist:
                          captionE: English label of the tab
```

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```
                                captionN: Dutch label of the tab
                                captionF: French label of the tab
                                captionG: German label of the tab
                                url: URL that will be executed when clicking on the tab
                                target: indicates where the tab will be shown
                -->
                <tab>
                        <captionE>Preview</captionE>
                        <captionN>Voorbeeld</captionN>
                        <captionF>Fichier</captionF>
                        <captionG></captionG>
                        <url>~/DM_PREVIEW.aspx</url>
                        <target>paneDetail</target>
                </tab>
                <tab isDefault="true">
                        <captionE>Details</captionE>
                        <captionN>Details</captionN>
                        <captionF>Détails</captionF>
                        <captionG></captionG>
                        <url>~/dm_detailview.aspx</url>
                        <target>paneDetail</target>
                </tab>
                <tab>
                        <captionE>Links</captionE>
                        <captionN>Linken</captionN>
                        <captionF>Liens</captionF>
                        <captionG></captionG>
                        <url>~/DM_List_Preview.aspx?screenmode=links</url>
                        <target>paneDetail</target>
                </tab>
                <tab>
                        <captionE>Version History</captionE>
                        <captionN>Versie Historiek</captionN>
                        <captionF>Fichier</captionF>
                        <captionG></captionG>
                        <url>~/DM_List_Preview.aspx?screenmode=prevversions</url>
                        <target>paneDetail</target>
                </tab>
                <tab>
                        <captionE>Comments</captionE>
                        <captionN>Commentaren</captionN>
                        <captionF>Fichier</captionF>
                        <captionG></captionG>
                        <url>~/Comments.aspx</url>
```

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```
                    <target>paneDetail</target>
            </tab>
            <tab>

                    <captionE>History</captionE>
                    <captionN>Historiek</captionN>
                    <captionF>Historique</captionF>
                    <captionG></captionG>
                    <url>~/DM_ObjectHistory.aspx</url>
                    <target>paneDetail</target>
            </tab>
            <tab>

                    <captionE>Custom</captionE>
                    <captionN>Custom</captionN>
                    <captionF>Custom</captionF>
                    <captionG></captionG>
                    <url>~/Custom/CustomTab.aspx</url>
                    <target>paneDetail</target>
            </tab>
    </documentGeneral>
    <folderGeneral>
            <tab isDefault="true">
                    <captionE>Details</captionE>
                    <captionN>Details</captionN>
                    <captionF>Custom</captionF>
                    <captionG></captionG>
                    <url>dm_detailview.aspx</url>
                    <target>paneDetail</target>
            </tab>
            <tab>

                    <captionE>Comments</captionE>
                    <captionN>Commentaren</captionN>
                    <captionF>Commentaires</captionF>
                    <captionG></captionG>
                    <url>Comments.aspx</url>
                    <target>paneDetail</target>
            </tab>
            <tab>

                    <captionE>History</captionE>
                    <captionN>Historiek</captionN>
                    <captionF>Custom</captionF>
                    <captionG></captionG>
                    <url>DM_ObjectHistory.aspx</url>
                    <target>paneDetail</target>
            </tab>
```

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```
        </folderGeneral>
        <caseGeneral>
          <tab>
            <captionE>Preview</captionE>
            <captionN>Voorbeeld</captionN>
            <captionF>Fichier</captionF>
            <url>~/DM_PREVIEW.aspx</url>
            <target>paneDetail</target>
            <image></image>
          </tab>
          <tab isDefault="true">
            <captionE>Details</captionE>
            <captionN>Details</captionN>
            <captionF>Détails</captionF>
            <url>~/dm_detailview.aspx</url>
            <target>paneDetail</target>
          </tab>
          <tab>
            <captionE>History</captionE>
            <captionN>Historiek</captionN>
            <captionF>Historique</captionF>
            <url>~/CaseHistory.aspx</url>
            <target>paneDetail</target>
          </tab>
          <tab>
            <captionE>Comments</captionE>
            <captionN>Commentaren</captionN>
            <captionF>Commentaires</captionF>
            <url>~/Comments.aspx</url>
            <target>paneDetail</target>
          </tab>
        </caseGeneral>
</PreviewPanes>
```

2.13   Default user preferences (DefaultUserPrefs.xml)

The default user preferences of a site can be configured via the DefaultUserPrefs.xml file..

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```xml
<?xml version="1.0" encoding="utf-8" ?>
<!-- This file describes the default users preferences for a site. This file can be found in the DocRoom/Sites/Default directory. -->
<params>
 <param name="DISABLEOVERRIDE" value="N"></param>
 <!--
        Y: the user can not deviate from the default configuration
        N: a default configuration exists but the user can change this configuration
 -->
 <param name="SHOWPREVIEW" value="Y"></param>
 <!--
        Y: the preview window is shown at the right hand side of the result window.
        N: If this option is not checked, the preview window (including all available tabs) is shown in a popup window when clicking on the title of an item in the result list.
 -->
 <param name="SHOWFOLDERSINLIST" value="Y"></param>
 <!--
        Y: folders matching the search or browse operation are shown the result list (not only documents are shown in the result list).
        N: folders are not shown in the result list except when a users is looking for folders (specify folder in the default result list or use a folder search screen)
 -->
 <param name="SHOWFILTERS" value="Y"></param>
 <!--
        Y: the filters are shown in the result list
        N: the filters are not shown in the result list
 -->
 <param name="SHOWMENU" value="Y"></param>
 <!--
        Y: the menu is shown
        N: the menu is not shown
 -->
 <param name="SHOWTOOLBAR" value="Y"></param>
 <!--
        Y: the toolbar is shown
        N: the toolbar is not shown
 -->
 <param name="SHOWCURRENTFOLDER" value="Y"></param>
 <!--
        Y: the current folder is shown in the header of every result list.
        N: the current folder is not shown in the header of every result list.
 -->
 <param name="SHOWQUERY" value="N"></param>
 <param name="RECSPERPAGE" value=""></param>
 <!--
        the number of results that has to be shown in the result list on a page
 -->
 <param name="SHOWSEARCHINLIST" value="N"></param>
```

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```
<!--
        Y: this option allows a user to see the search screen and the result list on the same page. This is only suitable for little search screens.
        N: search screen and result screen are shown alternating.
-->
<param name="ALWAYSSHOWATTACHMENTS" value="Y"></param>
<!--
        Y: all attachments of documents in a result list are shown in the list.
        N: the attachments of documents are not shown in the result list.
-->
<param name="SHOWTREE" value="Y"></param>
<!--
        Y: the tree window is shown
        N: the tree window is not shown
-->
<param name="SHOWINDEXTREE" value="N"></param>
<!--
        Y: the tree window is shown in the detail window to allow a user to change folders quickly
        N: the tree window is not shown in the detail window
-->
<param name="AUTOOPENFILEINDETAIL" value="Y"></param>
<!--
        Y: the main attachment will be automatically opened when opening the detail of a document.
        N: the main attachment will not be opened when opening the detail of a document.
-->
<param name="SHOWFOLDERLINKICONS" value="Y"></param>
<!--
        Y: the folder icons are shown in the tree path.
        N: the folder icons are not shown in the tree path.
-->
<param name="SHOWGLOBALSEARCH" value="Y"></param>
<!--
        Y: the global search is shown in the toolbar
        N: the global search is not shown in the toolbar
-->
</params>
```

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3   Integration

3.1   URL Integration

Different docroom screens and objects can be shown based upon an URL. A non exhaustive list of URL to be used is listed below:

001	Folder content without toolbar: http://domaRoot/dm_documentlist.aspx?screenmode=browse&dm_parent_id=99999
020	View a specific file: http://domaRoot/dm_view_file.aspx?file_fin=1111
030	View the document detail (meta data/files/toolbar): http://domaRoot/dm_detail.aspx?mode=1&dm_object_din=2222 http://domaRoot/dm_detail.aspx?mode=1&dm_object_id=2211
031	View the document meta data: http://domaRoot/dm_detailview.aspx?mode=1&dm_object_din=2222 http://domaRoot/dm_detailview.aspx?mode=1&dm_object_id=2211 http://domaRoot/dm_detailview.aspx?mode=1&dm_object_id=2211&SCREEN_ID=1001 TECH_ID CASE_ID DM_OBJECT_ID Mode folderid refreshtree selectedtab SCREEN_ID
	Create a document of category [CatID] in folder [FolderID] http://server/docroom/DM_NEW_OBJECT.ASPX?DM_CAT_ID=[CatID]&DM_PARENT_ID=[FolderID]

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Possible ways to call the template generator:

	Default template generator homepage: http://domaRoot/GenTemplate/default.aspx
	Create a new document from template, and link it to document [DocID] http://domaRoot/GenTemplate/default.aspx?DocID=1083621
	Create a new document based upon a template in folder [FolderID] http://domaRoot/GenTemplate/default.aspx?FolderID=1080109
	Create a new document based upon a template for document type [DocTypeID] http://domaRoot/GenTemplate/default.aspx?DocTypeID=2282
	Create a new document based upon a template for document type [DocTypeID] in folder [FolderID] http://domaRoot/GenTemplate/default.aspx?FolderID=1080109&DocTypeID=2282
	Create a new document from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?TemplateID=147
	Create a new file for document [DocID] from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?DocID=1083621&TemplateID=147
	Create a new document in folder [FolderID] from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?FolderID=1080109&TemplateID=147
	Create a new document of type [DocTypeID] from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?DocTypeID=2282&TemplateID=147

	Open a case/object with a specific screen (only in read only mode): http://domaRoot/DocRoom/dm_detailview.aspx?SCREEN_ID=100&???

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	Create a new document from template, and link it to document [DocID] http://domaRoot/GenTemplate/default.aspx?DocID=1083621
	Create a new document based upon a template in folder [FolderID] http://domaRoot/GenTemplate/default.aspx?FolderID=1080109
	Create a new document based upon a template for document type [DocTypeID] http://domaRoot/GenTemplate/default.aspx?DocTypeID=2282
	Create a new document based upon a template for document type [DocTypeID] in folder [FolderID] http://domaRoot/GenTemplate/default.aspx?FolderID=1080109&DocTypeID=2282
	Create a new document from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?TemplateID=147
	Create a new file for document [DocID] from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?DocID=1083621&TemplateID=147
	Create a new document in folder [FolderID] from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?FolderID=1080109&TemplateID=147
	Create a new document of type [DocTypeID] from template [TemplateID] http://domaRoot/GenTemplate/default.aspx?DocTypeID=2282&TemplateID=147

3.2   Main.aspx file explained

hideheader	true	Hide the blue header
	false	Show the blue header
menu	[filename containing	No .xml extension, just give the name of the

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	menu]	file to be used.
hideglobalsearch	true	Hide the global search box
	false	Show the global search box
hidetree	True	Hide the tree pane
	False	Show the tree pane (This is the default)
hidecurrentfolder	True	Hide the folder breadcrumbs
	false	Show the folder breadcrumbs
searchscreenmodes	??	??
defaultaction	??	??
Screenmode	browse	Browse the folder (This is the default)
	query	Show the search screen indicated in parameter DM_SCREEN_ID
DM_SCREEN_ID	Xxx	ID of the screen that should be loaded on opening of the site.
DM_PARENT_ID	Xxx	ID of the folder to be loaded when opening the the site
DM_ROOT_ID	Xxx	ID of the folder acting as the root of the folder breadcrumbs. Users will not be able to open higher level folders.
Treepage	[filename containing treepage definion]	No .xml extension, just give the name of the file to be used. The treepage definition contains the set of trees that should be available in the tree pane.
Tree	[filename containing tree description]	No .xml extension, just give the name of the file to be used.

Main.aspx?hideheader=true&menu=exploredossiermenu&hidecurrentfolder=true& DM_PARENT_ID=1166

DM_NEW_OBJECT.aspx
Pack_id

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DM_Detail.aspx
'&forcenext=true'

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