Arco

Training Guide For DocRoom WebInterface Users

A new era in document management.

Doma 6

Arco Training

*Training Guide for
DocRoom and Routing
WebInterface Users*

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If you have comments regarding this guide, please send them to training@arco.be.
Thank you for your cooperation.

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1 Introduction

What you will learn

In this chapter you will:

- Learn how to use this training guide
- Learn the most important DocRoom and Routing terminology

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1.1 Welcome!

Welcome to the DocRoom and Routing End User training. This training is a part of the Arco Open training Sessions.

During this course you will learn how to use the DocRoom WebInterface.

If you also want learn how to administer the DocRoom and Routing application, we strongly advise you to follow the DocRoom Application Administrator and the Routing Application Administrator course after this course.

1.2 Course goal

After completing this course, you will have the skills you need to do use the DocRoom WebInterface:

You will be able to:
- Add documents
- Add files to documents
- Download documents
- Link documents
- Search documents in different ways
- And much more

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1.3 Terminology

1.3.1 Doma

The Arco Doma suite is a combination of Arco DocRoom, a Document Management System and of Arco Routing, a workflow system.

Though it is not necessary to use both applications, Arco DocRoom and Arco Routing use the same database. This use of the same database simplifies integration of both applications.

Both applications have their own licenses and can be used individually.

This narrow integration of both products is a fact from version 6.

Migration or upgrade?

Depending upon your current software version, you will have to do a migration or an upgrade to version 6.

DocRoom	Routing
DocRoom 4 → DocRoom 5 = migration DocRoom 4 → DocRoom 6 = migration DocRoom 5 → DocRoom 6 = upgrade	Routing 4 → Routing 6 = migration

1.3.2 DocRoom Terminology

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

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

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

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

Folder Category
A folder category is a specific folder type, e.g. "personnel folder", "customer folder", etc.
Folder categories allow us to search on the different categories.
Each folder category can have its specific properties and can have a different icon in the tree structure.
It is also possible to link specific insert, update, search and result screens to a folder category.

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

Case Category
A case category is a DocRoom object, but a Routing procedure is also linked to it. It can be considered as a dossier that contains links to other Routing workflow dossiers and to documents or folders.

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

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

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

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

DocRoom and Routing have different kinds of properties, each have their own specific characteristics:

• 	Pool properties
• 	Document category properties
• 	Folder category properties
• 	Case category properties
• 	Procedure properties

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1.3.3 Routing Terminology

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

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

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

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

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

Release
Action to proceed to the next step of the procedure.

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

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

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2   Common parts for DocRoom and Routing

2.1   The Webinterface

DocRoom and Routing use the same web interface.

Advantages of a web interface:

→   Reachable via url: servername \ docroom

→   Automatic authentication based upon network login

→   Easy access from all PC's in the company network

2.2   Start page

When you open the Web Interface, the start page appears.

The start page consists of several parts:
1. *Navigation bar*
2. *Breadcrumbs*
3. *Menu Bar*
4. Global search field
5. *Tree Structure*
6. *Result list*
     a. *Groupers*
     b. *Result list toolbar*
     c. *List header*
     d. *Document bar*
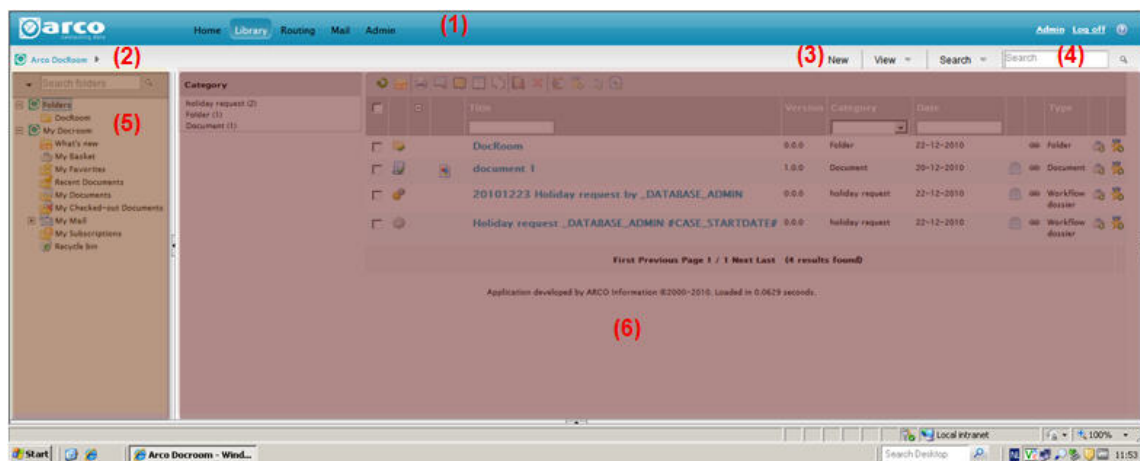
Remarks

- It is possible to **hide** the **Tree Structure** by closing the left pane of the screen.
- *Groupers* will not always appear in the result list. This depends upon the configuration of the result list.

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2.2.1 Navigation Bar

The navigation bar is situated on top of the screen. In the navigation bar you can navigate to the main screens of the application.

Next to that, it also shows the name of the user who is logged in, a log off possibility and a link to the help file.

Parts of the navigation bar:

	Arco logo. Can be replaced by another image.
Home	DocRoom and Routing home page. When selected, it shows the default advanced search screen and some links to the users' personal DocRoom items: • What's new • My Basket • My Favorites • My Documents • My checked out documents • My Subscriptions • My Work
Library	Link to DocRoom page. DocRoom is the digital archive or Document Management System of the application.
Routing	Link to the Routing page. Routing is the workflow engine of the application.
Admin	Link to the administration part of DocRoom and Routing. This link is only available for users with administrator rights.
Kris Steenackers	Name of the user that is logged in. Click on this user name to view the screen *My Preferences.*
log off	Allows you to log off. Next you can log in with another user.
	Link to the DocRoom and Routing help file.

Remark

Custom items can be added to the navigation bar.
In the following example, an item "Reports" is added to the navigation bar:

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2.3   Result screen - Introduction

The result screen appears when a user clicks on a folder or when a query is executed.

Different result screens can be used.

A first default result screen is configured for all browse actions.
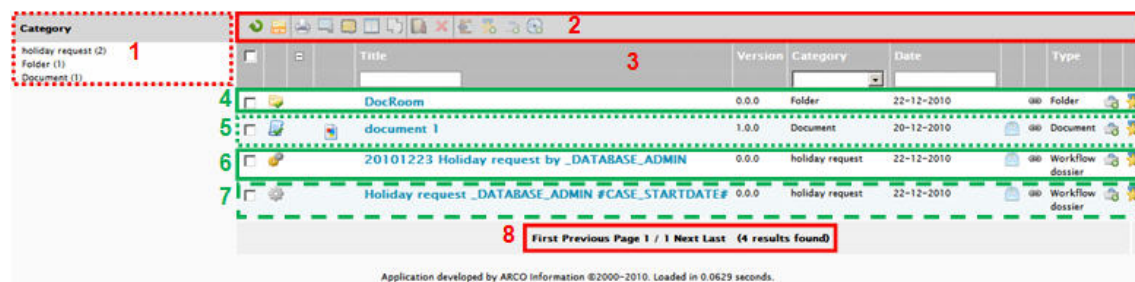
A second result screen is configured for all search actions.

Next to these two default result screens, application administrators can define specific result screens. These can be linked to

- A document type search screen
- A specific folder type

The result list will only show those documents that the user is allowed to see.

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2.3.1 Example of default lay-out for a result list when browsing the tree structure

When browsing, the tree structure and the breadcrumbs show which folder is currently selected.

The Result list can consist out of the next parts:

- **(1)** Groupers - allow you to filter the result list on pre-defined criteria; some groupers are shown by default, other can be shown/hidden by the user (depending on configuration).

- **(2)** Result list toolbar - here you can select an action that will be executed on the selected items in the result list.

- **(3)** Result list header - the list header shows the column names and columns filters. Re-order your result list with a left mouse click on a column name. Change filter, groupers view or columns view with a right click on the list header.

- **(4)** Folder bar - shows information about the folder and icons to do pre-defined actions on the folder.

- **(5)** Document bar - shows information about the document and icons to do pre-defined actions on the document.

- **(6)** Archived Routing dossier bar - shows information about the Routing dossier and icons to do pre-defined actions on the Routing dossier.

- **(7)** Routing Dossier Bar - shows information about the Routing dossier and icons to do pre-defined actions on the Routing dossier.

- **(8)** List navigation and number of results - Shows how many items are in this result list and navigation buttons to go to previous/next pages of the list.

2.3.2 Example of default lay-out for a result list after a query

The result list for a query is nearly the same as the result list when browsing, but also mentions what has been searched for in a frame at the same location as the groupers (**1**).
Next to that, an option to return to the search screen is added in the right lower corner of the result list (**2**).
If activated, the words you were looking for are highlighted in the result.

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2.3.3 Order your own result list
How to influence the appearance of your result list.

You can:

2.3.3.1 order your result list alphabetically

Click on the column header of the column that you want to order alphabetically:

click again to reverse the order:

2.3.3.2 filter on values of a certain column

Above certain columns of the result list, you can find a filter. Here you can enter a (part of a word) on which the result list will be filtered: only documents with this (part of the word) will appear in the result list:

2.3.3.3 show/hide certain columns of the result list

Put the cursor somewhere on the column header.

Click on the right mouse button. A menu appears: select the option Select Columns.
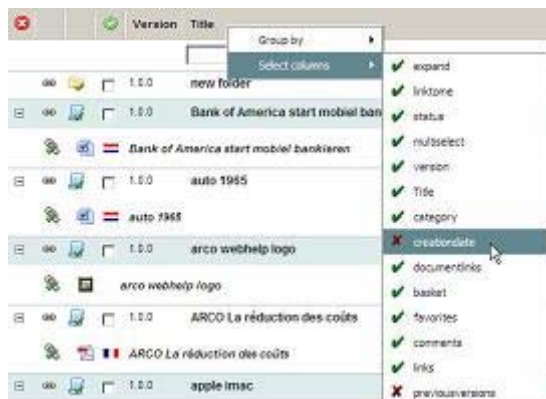
Click on the icon ✔ next to the column name to hide it. (The icon becomes ✘).
Click on the icon ✘ next to the column name to show it. (The icon becomes ✔).

2.3.3.4 use a grouper to regroup the result list

You can filter on a result list using groupers. A grouper is a term on which you can filter your result list.
It is also possible to combine groupers.

Put the cursor somewhere on the column header to use groupers:

Click on the right mouse button. A menu appears: select the option Group by.

Click on the name of the grouper to activate. The icon ✔ appears next to the grouper to indicate that it is active.
Click on the icon ✔ to de-select the grouper.

As a result, the grouper appear in the left part of the result window. The result list that is shown can now be filtered on the items mentioned at the left part of the screen.
Click on one of the items in the grouper list to filter only those documents that correspond to this grouper.
Click on the option Clear under the groupers list to clear your selection.

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2.3.3.5 Use pre-defined filters

You can filter a result list using pre-defined filters.
Put the cursor in the header of the result list.
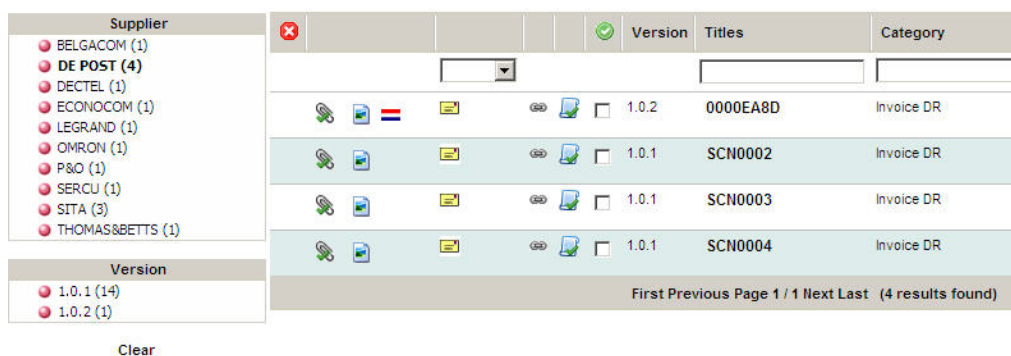Click on the right mouse button. A menu appears: select the option *Filter.*

Click on the name of the filter to activate.
The icon ✔ appears next to the filter to indicate that it is active..
Click on the icon ✔ to de-select the filter.
As a result, the result list is immediately filtered as defined. E.g. only documents are shown.

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2.3.4 Show/hide a column in the result list
How to show/hide a column in the result list

When you are allowed to configure your personal result list, you can show/hide certain columns.

- With a right mouse click on the list header, the **Select columns** option appears.
-

- Click on this option to edit your result list.
- The next menu appears:
-

- Icon ✔ indicates the column is visible.
- Icon ✘ indicates the column is hidden.
- Click on the icon ✔ to hide a column. The icon changes into ✘.
- Click on the icon ✘ to show a column. The icon changes into ✔.

> **Remark**
>
> *It's possible that you are not allowed to change the view of the result list. If so, you won't see the item Select groups when you click on the right mouse button in the list header.*

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2.4   My preferences – personal settings in DocRoom

What you will learn

In this chapter you will learn all about the screen personal settings:

- Profile
- Member of
- Preferences
- Delegates

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2.4.1 Description of My Preferences

To view your preferences: in the navigation bar, click on the name of the user that is logged in.

The My Preferences window will pop-up.

The window is divided in the next 4 tabs:

2.4.1.1 Profile

The *Profile* tab contains:

User details

Login name: the name that is used to log in. Cannot be changed.
Display name: name that is shown in the navigation bar. Can be changed.
Password: the password that is used to log in with a database user. Can be changed.
Language: the language of the interface for your user. Can be changed.

Detail data

The detail data gives an overview of fields that are not mandatory.
By default, they are not used by DocRoom or Routing.

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Login data

The login data shows the date and time of the last action in DocRoom and Routing.
Here you can also indicate that this user is a named user for DocRoom or Routing.
(Depending on the software licence, DocRoom and Routing work with concurrent users or named users.)

2.4.1.2   Member of

The *Member of* tab shows the roles and groups of which your user is a member.
Roles *are groups defined within DocRoom and Routing and can thus be administrated by the application administrator.*

Click on the pencil icon 🖉 *under the roles list to edit the list.*
Groups *are synchronized from the network; they are administrated by the network administrator.*

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2.4.1.3 Preferences

The **Preferences** tab contains individual user preferences that influence the look & feel of the WebInterface.

Overview of the items in the tab Preferences:

Show the toolbar	☑ Shows the toolbar. ☐ Hides the toolbar. You can find the toolbar below the menu bar. You can add buttons to the toolbar via the *Options*-menu.
Preview at the right hand side of the list	☑ A preview of the document will be shown at the right of the result list when you click on the title of the document or on the link to the file. This option prevents that a large number of screens is opened at the same time. ☐ The document will be opened in a new screen when you click on the title of the document or on the link to the file.
Show filters in your result list	☑ You will be able to filter in the result list. You will not be able to filter on the subfolders. You can filter on **Relevance, Version, Title**, **Category** and **Date**. The filters will appear on top of the result list. ☐ Filters will not appear on top of the result list.
Show folders in your result list	☑ The result list will show subfolders of the current folder. ☐ There will be no subfolders in the result list.
Show current folder in your result list	☑ The folder navigation will appear above the result list. ☐ There will be no folder navigation above the result list.

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Show the SQL statement in result list	☑The select statement to the Database will be shown above the result list when this option is selected . ☐No select statement will be shown above the result list.
Show the used search screen in the result list	☑You will see a search screen on top of the result list. ☐There will be no search screen on top of the result list.
Always show the document attachments	☑Attachments will be shown in the result list. ☐The document attachments will not be shown in the result list. The attachments can be viewed when the document is opened.
Show the tree structure	☑The Tree Structure will be shown. ☐The Tree Structure will be hidden. Remark: tree can be hidden/shown manually by clicking on the 'collapse/expand the left pane' button. This button is located in the middle of the bar between the tree structure and the result screen.
Use the indexing tree in detail mode	☑An index tree will be shown when editing a document. First open the document by double-clicking on the document title. You can click on the icon *Edit* on top of the detail screen of the document. The index tree looks the same as the Tree Structure. This tree makes it easy to restore the selected document. Select a folder in the tree where you want to restore the document to and click on the *Save* icon, the document will now be moved to the selected folder. ☐No index tree will be shown when the document is edited.
Preview the attachments when opening a document	☑The main file will be opened automatically in a new screen when the document is opened. ☐Only the meta-data and a link to the file will be shown.
Show folder icons in the folder structure	☑The folder icons will be shown to identify the foldertype. ☐No folder icons will be shown.
Show Global Search	☑The Global Search field will be shown in the start screen. ☐The Global Search field will be hidden.
Show Locked Dossiers in My Work	☑Dossiers locked by another user are shown in the My Work list of Routing. ☐Dossiers locked by another user are **not** shown in the My Work list of Routing.
Send notification on new distribution	☑A mail notification message is sent to your user when a new data distribution is sent to you in Routing. ☐No mail notification message is sent to your user when a new data distribution is sent to you in Routing.
Reset	Click on the option *Reset* to reset the settings to its default.

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2.4.1.4 Delegates

In the tab *Delegates* tab you can:

- see a list of the users/groups/roles to whom you have assigned your work list.
- see a list of the users who have assigned their work list to your user.
- delegate your Routing work list to another user.

About delegates/delegations
Users can delegate their Routing workflow list to other users.
When you delegate your work list to another user, this user can access your work list and treat your work.

Remark
Though the other user cannot refuse your delegation, this does not mean that he/she will effectively treat your work: you only allow him/her to access your work and to treat your work. He/she is not obliged to do so. The work also stays in your work list: it is not a transfer of your work.

The tab shows 2 lists:

1. *Delegated from me*: shows the users to whom you have delegated your work list.
2. *Delegated to me*: shows the users who have delegated their work list to you.

Columns

Column name	Description
To	Name of the user to who you have delegated your work list.
From	Name of the user who has delegated his/her work list to you.
Procedure	Only items of this procedure are delegated to the user.
Mode	**Manual**: delegation is activated manually and will be ended manually. **Timed**: delegation is automatically started at the time mentioned in the column Begin and ended at the time mentioned in the column End.
Begin	Only completed if delegated in Timed mode. Indicates the start time of the delegation.
End	Only completed if delegated in Timed mode. Indicates the end time of the delegation.
🖉	Click here to edit the delegation. A window will pop-up.
✖	Click here to delete the delegation. A confirmation message "Are you sure you want to delete this record?" appears. Click **OK** to confirm. The delegation will be removed.
⊕	Click here to add a new delegation.

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3 DocRoom Web Interface

What you will learn

In this chapter you will:

- Get to know the structure of the Doma WebInterface:
    - o Start Page
    - o Navigation Bar
    - o Breadcrumbs
    - o Tree Structure
    - o Menu Bar
    - o Result List

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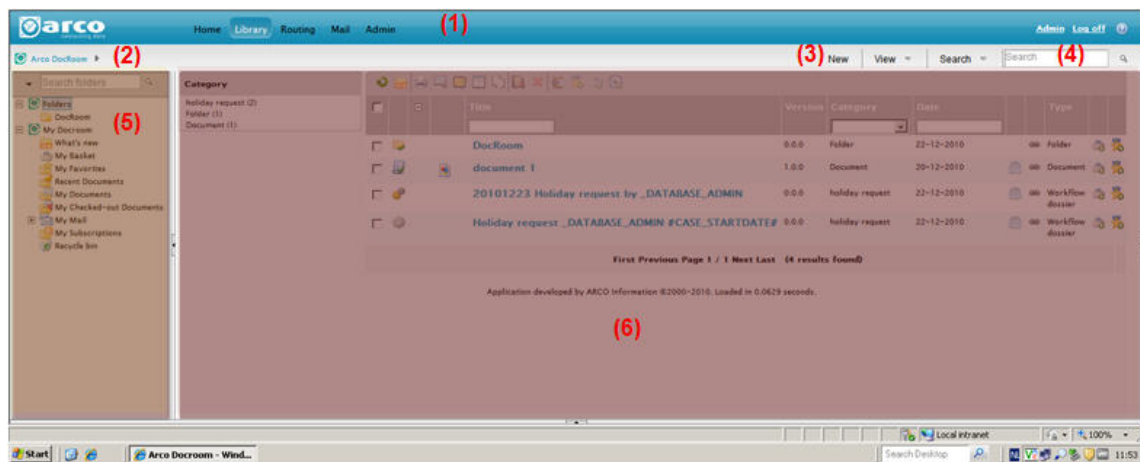
3.1 Why a Webinterface?

→ Reachable via url: servername \ docroom

→ Automatic authentication based upon network login

→ Easy access from all PC's in the company network

3.2 Start page

When you open the Web Interface, the start page appears.

The start page consists of several parts:
   7. *Navigation bar*
   8. *Breadcrumbs*
   9. *Menu Bar*
   10. Global search field
   11. *Tree Structure*
   12. *Result list*
        a. *Groupers*
        b. *Result list toolbar*
        c. *List header*
        d. *Document bar*

Remarks

- It is possible to **hide** the **Tree Structure** by closing the left pane of the screen.
- *Groupers* will not always appear in the result list. This depends upon the configuration of the result list.

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3.2.1 Navigation Bar

The navigation bar is situated on top of the screen. In the navigation bar you can navigate to the main screens of the application.

Next to that, it also shows the name of the user who is logged in, a log off possibility and a link to the help file.

Parts of the navigation bar:

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Home	DocRoom and Routing home page. When selected, it shows the default advanced search screen and some links to the users' personal DocRoom items: • What's new • My Basket • My Favorites • My Documents • My checked out documents • My Subscriptions • My Work
Library	Link to DocRoom page. DocRoom is the digital archive or Document Management System of the application.
Routing	Link to the Routing page. Routing is the workflow engine of the application.
Admin	Link to the administration part of DocRoom and Routing. This link is only available for users with administrator rights.
Kris Steenackers	Name of the user that is logged in. Click on this user name to view the screen *My Preferences.*
log off	Allows you to log off. Next you can log in with another user.
	Link to the DocRoom and Routing help file.

Remark

Custom items can be added to the navigation bar.
In the following example, an item "Reports" is added to the navigation bar:

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3.2.2 Breadcrumbs

The breadcrumbs show you in which folder you are browsing. The last folder in the row is the current folder.

You can click on the name of a folder in the breadcrumbs to open this folder.

When you click on the ⌐ icon at the right of the folder, you see a dropdown menu with all subfolders of that folder. Click on one of the subfolders to view its content.

Breadcrumbs can be very useful when you are searching. It offers you the possibility to filter the results on the folder. Execute a global or advanced search. The result list will appear. Click on a folder in the folder navigation to view the result in that folder. You can also use the ⌐ icon to view the results in a subfolder of this folder.

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3.2.3 Tree Structure

The Tree Structure organizes DocRoom documents and Routing dossiers in a hierarchical folder structure. The root folder is called Folders.
Under the Root folder, on the same level, you see a part called My DocRoom. This part is a personal folder that links to several personal DocRoom items.

<u>Search on the folder name</u>
This section allows you to search a certain folder in the Tree Structure.

<u>Tree View</u>
The Tree View organizes all DocRoom documents in a structured way.
Left click on a folder to view its content.
Right click on a folder to show a menu with possible actions.

<u>My DocRoom - Personal folders</u>
In this part of the DocRoom Tree Structure, you can view your selections and recent documents.

Nice to know

- It is possible that certain users can see more folders than other users: this depends upon the security configuration
- You can create a dynamic Tree View using property expansions.
- Next to search on folder names, you can search on folder properties (if your folders has properties). This search can be executed via the menu-item *Search*.

See chapter 2 for more information about the tree structure.

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3.2.4 Menu bar

The menu bar is a list of actions that can be executed within the context of the current folder (which is indicated in the breadcrumbs).
*It appears on the same level as the beadcrumbs.*
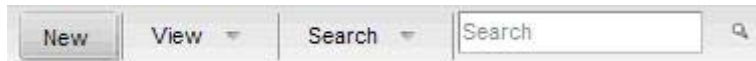
- The menu bar is integrated in the web interface because most users are familiar with it.

- The menu bar contains a number of menu's from where actions/functions can be started. These are linked to the active result screen.

Each item of the *Menu Bar* contains a drop-down menu of additional options.
It also contains a global search field.

From this menu bar, the next menus can be opened:

New
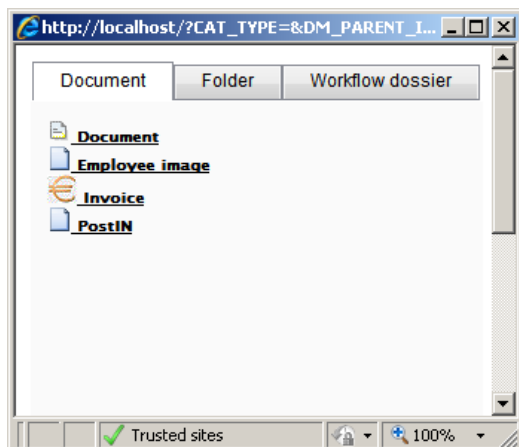
When you select the **New** option, a pop-up window appears.

It shows 3 tabs:
    Documents
    Folder
    Workflow dossier

Select the tab of the item which you want to add.

In the tab, all items that can be created are shown.

Tab Document
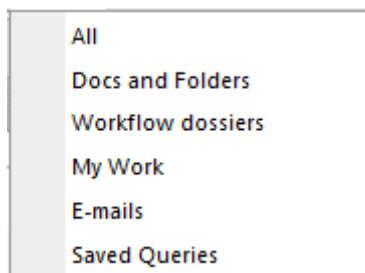- Click on the name of the document category to create a new document.

Tab Folder
- Click on the name of the folder category to create a new folder.

Tab Workflow dossier
- Click on the name of the procedure to start a new dossier.

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View

When you select the *View* option, a menu appears.

All - view all items in the list.
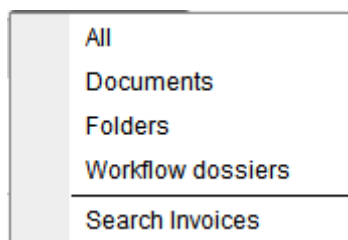**Docs and Folders** - only show documents and folders in the result list.
Workflow dossiers - only show Workflow dossiers in the list.
My Work - show the Routing list My Work.
Mails - show only mails.
Saved queries - show the list of saved queries.

Search

When you select the *Search* option, a menu appears.

All - open a search screen that allows search on all items.

Documents - open a search screen that allows search on documents only. (The user can only select document categories to search on).

Folders - open a search screen that allows search on folders only. (The user can only select folder categories to search on).

Workflow dossiers - open a search screen that allows search on workflow dossiers only. (The user can only select case categories and procedures to search on).

Custom search screens
All items mentioned under the horizontal line in the window, are custom made search screens. The users can select one of the screens to find items in the system.

Global search field

The global search field allows you to search on all available information (all metadata: i.e. title, author, ... + full text) of an item.

The search will be executed on the selected folder (Current Folder) and its subfolders.

How to search
- Enter your search criterion in the field. If more than one word is searched, you can use Search Operators.
- Decide if you want to search in the subfolders of the current folder. If not, uncheck the checkbox at the right of the field.
- Click on the magnifying glass icon at the right of the field to start the search.

Remark
It's not possible to enter a date or number in the Global Search field. If you want to search for documents with a certain date you can search via the Search-menu. There you can enter the searched date in the Date-field.

Searching in DocRoom will be discussed later in this course.

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4   Tree Structure

What you will learn

In this chapter you will:

- Learn about folder types.
- Get an explanation of the different parts of the tree structure.
- Learn how to show/hide the tree structure.
- Learn how to create a subfolder.
- Learn all about the right click menu.
- Learn how to move a folder.
- Learn how to search on folder names.
- Learn all about dynamic folders:
    - o Definition
    - o 2 types: property expansion and saved query
    - o How to create a property expansion

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4.1 Tree Structure - Introduction

The tree structure allows users to arrange the files that are added to the DocRoom.

This structure can be compared with:

- A windows folder structure
- A physical archive
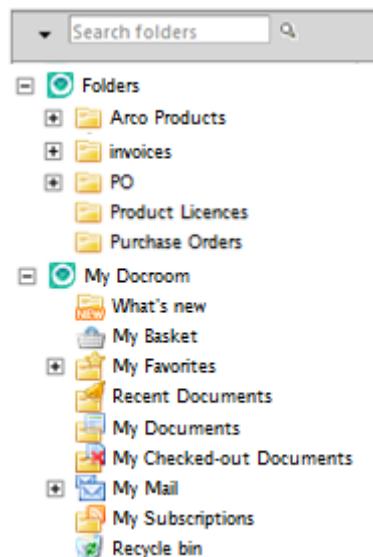 (room –cabinet – shelf – filing box – file – documents)

Extra in comparison to a Windows folder structure:

Folder types, having their own specific properties:

- Specific icon
- Properties (meta data) on folder level

- When defining these folder types, the application administrator can:
  - Define which other folder types can appear as a subfolder in a folder of this folder type .
  - Define which document types are allowed in folders of this folder type.
  - Define which procedures can be started from folders of this folder type.

The tree structure is very important for the security of the DocRoom system:

- It is the basis of the default security
- subfolders and documents inherit the security settings of the above folder (default security)
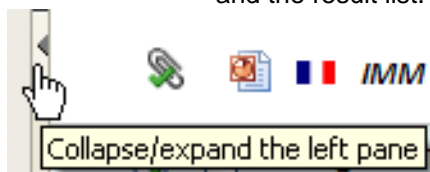
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The Tree Structure can be divided into the next parts

- Search on folder name

- Docroom tree view

    i. Left Mouse button click:
       Default action = show folder content

    ii. Right Mouse button click:
        Default action = a menu with different options appears

    iii. Property Expansion
         Property expansions allow you to reorganize folder content. It appears as a new dynamic folder with a specific icon in the tree structure.

    iv. Saved Query
        It is possible to hang a saved query in the tree structure. It then appears as a dynamic folder with a specific icon in the tree structure.

- My DocRoom
    - What's new
    - My basket
    - My favorites
    - Recent documents
    - My documents
    - My checked-out documents
    - My subscriptions

Show/hide tree structure

- Automatically:
  via the tab *Preferences* in the screen *My Preferences* (can be opened by clicking on your user login in the navigation bar)

- Manually: Click on the icon in the centre of the bar between the tree structure and the result list.

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4.2   Search on folder name

Above the DocRoom tree, you can see a search field.
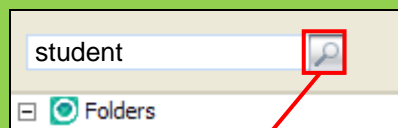This allows you to search on folder names.

Enter
- a word
- a part of a word
- more than one word

in the search field and click on the button with the magnifying glass to execute the query.

As a result, only those folders that contain the word(s) entered in the search field are shown.

4.2.1   Exercise – Search on folder name

a.   Select the base folder (also called root) **Folders**.

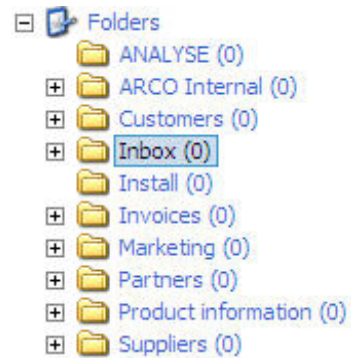b.   Enter the search criterion *student* in the search field above the tree structure:

c.   Click on the **search** icon next to it to start the search.

d.   Only the folders that contain the word(s) entered in the search field will be shown in the tree structure.

To show all folders again, delete the search criteria in your search field and press [enter].

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4.3   Tree View

The Tree View organizes all DocRoom documents in a hierarchical way.

Tree icons:

Click on the expand icon ⊞ *next to a folder to view all its subfolders.*

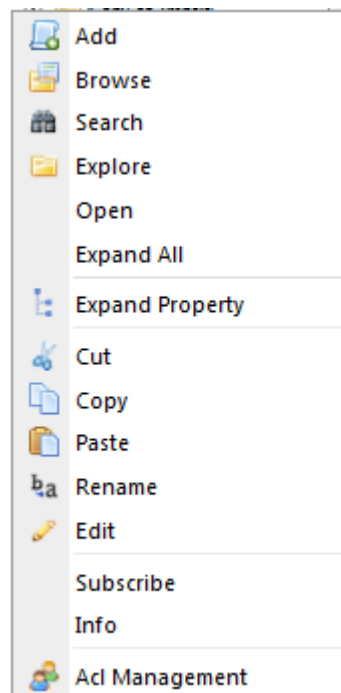*Click on the collapse icon* ⊟ *next to a folder to collapse the folder.*

Default folder icon: 📁 *(Folder icons can differ: each folder category can have its own icon. This can be configured by an administrator in the Routing Builder module.)*

The selected folder is marked by a blue rectangle. (Folder **Inbox** *in the example)*

- *Left-click on a folder to view its content.*

- *Right-click on a folder to show a menu with possible actions.*

These are the default settings of the result of the left and right click. The result can be different depending on the configuration.

After a right click, a menu similar to the example below will appear:

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Possible actions on folders / the tree structure:

Add	Add a subfolder or a document to the selected folder.
Browse	View content of the selected folder.
Search	Start search window to search in the selected folder.
Explore	Open this folder in a new frame, so you can expand the selected folder without losing overview.
Open	Show folder properties.
Info	This opens a new window with general information about the folder.
Expand All	Show all subfolders of the selected folder.
Add Property Expansion	Add a property expansion to the selected folder.
Cut	Cut the selected folder.
Copy	This action allows you to copy the selected folder.
Paste	Paste an item in the selected folder.
Rename	Via this action you can rename the current folder. Clicking on this action opens a new window where you can enter a new name. Click on *Save* to save the new name.
Edit	Open the folder properties in edit mode so you can make changes immediately.
Delete	Delete folder and folder content.
Subscribe	Subscribe to the selected folder so you receive an email from the moment new items have been added to the folder.
Info	Opens a window with more technical information about the folder. (Category, name, ID, folder location, number of documents, created on, created by, last modified on, last modified by)
ACL	Access Control List -> manage folder security.

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4.3.1   Exercise – Create a folder starting from the tree structure

a.   Open the DocRoom Web Interface.

b.   Select the folder *Training Exercises*.

c.   Click on the right mouse button. A menu appears.

d.   Click on the option **Add** in the menu.

e.   The pop-up window *Select* appears: the only possible subfolder you can create is one of the folder type **Trainee**. Click on it to create a new folder.

> The administrator can define which subfolders can be created in another folder type. Consequence of this configuration is that users are obliged to create a tree structure that responds to certain rules, e.g. in the training exercises you can allow users to create a subfolder of the type trainee, but no subfolders of other folder types.

f.   Insert your user name (**StudentNN** *[NN = the number of your user Student]*) in the field **Name**. Then click on *Save*.

g.   A second screen appears: here you can add additional information that can be used to search upon. Enter your company and e-mail address.

h.   Now click on the **Save** icon in the toolbar.

i.   Close the window after saving.

j.   The new folder appears in the tree structure.

4.3.2   Exercise – Create another folder starting from the tree structure

a.   Select the folder *Demo*.

b.   Click on the right mouse button. A menu appears.

c.   Click on the option **Add** in the menu.

d.   The pop-up window *Select* appears: notice that it is not possible to create a subfolder here. It is also not possible to add documents. Both actions are not allowed in the configuration of the folder type of this folder or in the security settings of the folder.

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4.3.3 Exercise – Move a folder

a. Select the folder **Move StudentNN** *[NN = the number of your user Student]* in the folder **Training Folder**.

b. Click on the right mouse button. A menu appears.

c. Click on the option **Cut** in the menu.

d. Select the folder **Training exercises\student(your number)** in the tree structure.

e. Click on the right mouse button. A menu appears.

f. Click on the option **Paste** in the menu.

g. The folder is now moved.

4.3.4 Exercise – Copy a folder and rename

a. Select the folder **Invoices** in the folder **Demo**.

b. Click on the right mouse button. A menu appears.

c. Click on the option **Copy** in the menu.

d. Select the folder **Training exercises \ student(your number)** in the tree structure.

e. Click on the right mouse button. A menu appears.

f. Click on the option **Paste** in the menu.

g. The folder is now copied.

h. Put the cursor on the folder name and click on the right mouse button. A menu appears.

i. Click on the option **Rename** in the menu.

j. A new window appears. Enter the name **Invoices StudentNN** *[NN = the number of your user Student]* and click on the option **Save** under the field.

k. The folder is now renamed.

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4.3.5 Tree view – Dynamic folders

Sometimes, the tree structure does not organize the DocRoom content the way you would like to organize it.

In that case, you can reorganize the tree structure using a **_dynamic folder_**.

A dynamic folder can be created by a user.

There are 2 kinds of dynamic folders:

a. **Property expansion**: creation of a folder structure based upon the value of a _property_. Per vale found in the selected property, a folder will be created. In this folder all documents with this value will be shown.

b. **Saved query in the tree**: a saved query can be put in the tree structure. From that moment, it reacts as a folder.
When a user clicks on the saved query folder in the tree, the saved query is executed. The result of the saved query is the content of the folder.

Dynamic folders thus allow users to create their own tree structure. Depending upon security settings, these personally created folders can also be shown to other users.

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4.3.6 Exercise – Create a property expansion

a. Select the folder **Training exercises \ student(your number) \ StudentNN** *[NN = the number of your user Student]* in the tree structure.

b. Select the option **Add Property Expansion** in the menu that appears when you click on the right mouse button.

c. A pop-up screen with the name **Query** appears.

d. In this window, you can define your property expansion. Enter the next criteria:

    a. **Private**: only you can see the property expansion
    b. **On the folder where the query is executed**: property expansion will be executed on the folder selected in the tree. (In this case: your invoices folder). When the property expansion is moved, it will be executed on the new folder.
    c. **Name**: invoices per supplier
    d. **Property**: Supplier

e. Click on **Save** (right lower corner).

f. A new (dynamic) subfolder structure appears under your folder. It shows a folder per supplier that has been found in the properties of the folder where you have defined the property expansion. After each folder there is a count that indicates the number of documents in the folder.

g. Click on a dynamic folder name to view its content.

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4.4   My DocRoom

In this part of the DocRoom Tree Structure, you can view your selections and recent documents:
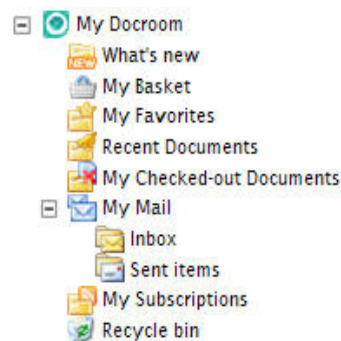
Overview of the My DocRoom items:

What's new	In *What's new* you can find a list of all new documents/folders that were added to DocRoom. By using a calendar, you can select a specific date or a time rate.
My Basket	Shows the documents you have selected in the *Basket*. The Basket is a selection tool that is used to group documents to do a certain action on them. E.g. you can group the documents from two different queries in order to restore them.
My Favorites	Shows the documents you have selected as your favorite documents. In the Favorites list you can group often used documents.
Recent Documents	Shows the last 60 documents opened by your user.
My Documents	This shows your personal folder. The first time you log on to the system, a personal folder with your username is created. In this folder you can store your personal documents. Only your user has access to these documents.
My Mail	Menu that contains all internal "mail" or messages. Extended functionality of the Routing data distribution of the previous Routing version.
My Checked-out Documents	This is the list of the documents you have checked-out. Documents can be checked-out in order to change the document and create a new version. In this folder you can also find documents with a checked-out file.
My Subscriptions	DocRoom allows each user to subscribe to a folder or a saved query. When a user subscribes to a folder, he/she will receive an e-mail message when new documents are added to this folder. The mailing list has a maximum frequency of one email per day, depending on inserted documents.
Recycle bin	The *Recycle Bin* contains all deleted documents/folders. From here the administrator can really delete the removed documents.

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5   Result screen

What you will learn

In this chapter you will:

- Learn what the different parts of the result screen are.
- All about breadcrumbs.
- How to organize your result list.
- All about the document bar:
    - o Different look and feels.
    - o Document information.
    - o Right-click menu of the document.
- How to add a document starting from the tree structure.
- How to add a file to a document.
- How to add a file as a new document starting from the menu bar.

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5.1   Result screen - Introduction

The result screen appears when a user clicks on a folder or when a query is executed.

Different result screens can be used.

A first default result screen is configured for all browse actions.

A second result screen is configured for all search actions.

Next to these two default result screens, application administrators can define specific result screens. These can be linked to

- A document type search screen
- A specific folder type

The result list will only show those documents that the user is allowed to see.

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5.1.1 Example of default lay-out for a result list when browsing the tree structure

When browsing, the tree structure and the breadcrumbs show which folder is currently selected.

The Result list can consist out of the next parts:

- **(1)** Groupers - allow you to filter the result list on pre-defined criteria; some groupers are shown by default, other can be shown/hidden by the user (depending on configuration).

- **(2)** Result list toolbar - here you can select an action that will be executed on the selected items in the result list.

- **(3)** Result list header - the list header shows the column names and columns filters. Re-order your result list with a left mouse click on a column name. Change filter, groupers view or columns view with a right click on the list header.

- **(4)** Folder bar - shows information about the folder and icons to do pre-defined actions on the folder.

- **(5)** Document bar - shows information about the document and icons to do pre-defined actions on the document.

- **(6)** Archived Routing dossier bar - shows information about the Routing dossier and icons to do pre-defined actions on the Routing dossier.

- **(7)** Routing Dossier Bar - shows information about the Routing dossier and icons to do pre-defined actions on the Routing dossier.

- **(8)** List navigation and number of results - Shows how many items are in this result list and navigation buttons to go to previous/next pages of the list.

5.1.2 Example of default lay-out for a result list after a query

The result list for a query is nearly the same as the result list when browsing, but also mentions what has been searched for in a frame at the same location as the groupers (**1**).
Next to that, an option to return to the search screen is added in the right lower corner of the result list (**2**).
If activated, the words you were looking for are highlighted in the result.

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5.1.3 Order your own result list
How to influence the appearance of your result list.

You can:

5.1.3.1 order your result list alphabetically

Click on the column header of the column that you want to order alphabetically:

click again to reverse the order:

5.1.3.2 filter on values of a certain column

Above certain columns of the result list, you can find a filter. Here you can enter a (part of a word) on which the result list will be filtered: only documents with this (part of the word) will appear in the result list:

5.1.3.3 show/hide certain columns of the result list

Put the cursor somewhere on the column header.

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Click on the right mouse button. A menu appears: select the option Select Columns.

Click on the icon ✔ next to the column name to hide it. (The icon becomes ✘).
Click on the icon ✘ next to the column name to show it. (The icon becomes ✔).

5.1.3.4   use a grouper to regroup the result list

You can filter on a result list using groupers. A grouper is a term on which you can filter your result list.
It is also possible to combine groupers.

Put the cursor somewhere on the column header to use groupers:

Click on the right mouse button. A menu appears: select the option Group by.

Click on the name of the grouper to activate. The icon ✔ appears next to the grouper to indicate that it is active.
Click on the icon ✔ to de-select the grouper.

As a result, the grouper appear in the left part of the result window. The result list that is shown can now be filtered on the items mentioned at the left part of the screen.
Click on one of the items in the grouper list to filter only those documents that correspond to this grouper.
Click on the option Clear under the groupers list to clear your selection.

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5.1.3.5 Use pre-defined filters

You can filter a result list using pre-defined filters.
Put the cursor in the header of the result list.
Click on the right mouse button. A menu appears: select the option *Filter.*

Click on the name of the filter to activate.
The icon ✔ appears next to the filter to indicate that it is active..
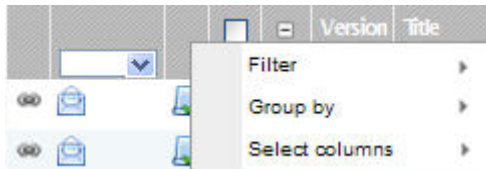Click on the icon ✔ to de-select the filter.
As a result, the result list is immediately filtered as defined. E.g. only documents are shown.

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5.1.4 Show/hide a column in the result list
How to show/hide a column in the result list

When you are allowed to configure your personal result list, you can show/hide certain columns.

- With a right mouse click on the list header, the **Select columns** option appears.
-

- Click on this option to edit your result list.
- The next menu appears:
-

- Icon ✔ indicates the column is visible.
- Icon ✘ indicates the column is hidden.
- Click on the icon ✔ to hide a column. The icon changes into ✘.
- Click on the icon ✘ to show a column. The icon changes into ✔.

> **Remark**
>
> *It's possible that you are not allowed to change the view of the result list. If so, you won't see the item Select groups when you click on the right mouse button in the list header.*

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5.2 Document bar

5.2.1 In general

When browsing to a folder or when searching, a result list will appear.
This result list consists of several documents/folders/Routing dossiers.
Each document/folder/Routing dossier is represented by a bar.

Each Document bar consists of a set of icons and text that give more information about the document and the files linked to it.

- The upper row shows the information about the document and the main file that is attached to it.
- The (shorter) rows under the first row show the other files attached to the document.

Each user can adapt the view of the result list (and thus of the document bar) in his/her web interface (if allowed in the configuration).

5.2.2 Views

By default, the user will see a document bar that looks like the next example:

- **Document with automatic title (no title shown in the overview) and no file attached:**

- **Document with one file attached:**

The linked file is show with its specific icon. Next to it, you can see the icons that represent the different renditions of the file (1).
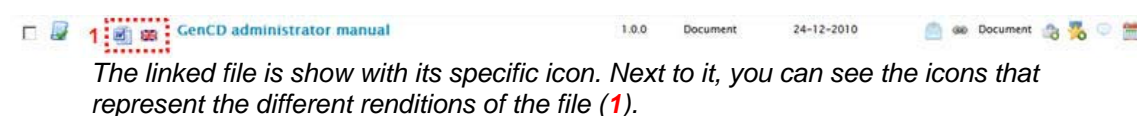
- **Document with 3 files attached: the main file is shown in the first row, all other files appear as lines under the document information:**

The main file is show with its specific icon, next to it, you can see the different renditions of the file (1).
The other linked files appear, with an indent, under the document info, starting with the file icon, followed by extra information about the file (2).

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5.2.3 Actions

- Click on the document title to open the document detail in the right frame.

- Double-click on the document title to open the document detail in a pop-up window.

- By right-clicking on the document title you can view the different document actions.

- By right-clicking on a file name you can view the different file actions.

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5.3 Document detail

A document detail can appear in 2 different ways:
1. As a pane opening on the right side of the result list (one right-button mouse click on document title)
2. As a pop-up window (double-click on the right mouse button on document title)

5.3.1 Document detail - left mouse click

Description of the document detail appearing in the right pane.

Depending upon user rights and application configuration, the right frame will show a list of tabs. By default, the next tabs are shown:

Preview: preview of the main file

Details: all metadata of the document and a list of all files linked to the document

 Links: list of linked documents

Version History: all previous versions of the document and its files

Comments: list of comments for this document + the possibility to enter new comments

History: list of all actions done on the document and its files

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5.3.2 Document detail – double click

Description of the document detail in pop-up modus.

When appearing in pop-up modus, the document detail will show both metadata and a preview of the main file.

	Item	Description
1	Document toolbar	The toolbar contains a number of buttons that allow actions on the document.
2	Document properties	The properties show all items that allow you to find the document.
3	Document files	All files that are linked to the document. The main file is shown in bold. This is the file that is opened by default in the preview at the right.
4	File toolbar	The toolbar contains a number of buttons that allow actions on the file in the preview.
5	File title	Title of the file in preview.
6	Navigation buttons	Buttons that allow the user to open the detail screen of the next/previous document of the result list.
7	File preview	Preview of the file selected in the file list of the document.

Document toolbar
The document toolbar of the pop-up window contains the next buttons:

Read-only mode:

Edit mode:

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Overview and description of all icons of the document toolbar:

Icon	Name	Description
	New	Create a new document without closing the pop-up window that shows the document detail.
	Duplicate	Duplicate the actual document. A new document with the same properties but without files will be created. The properties appear in edit, so you can immediately make your changes on the copy. The document is is the same as the original name, but starts with *copy of*.
	Edit	Opens the document properties in edit mode, which allows you to make changes to the document properties. When you edit a document without a check-out, you cannot change the version number or keep the previous version of the document. *Click here for more information about editing documents.*
	Save	Save changes.
	Save and edit next	Save, close current document and edit next document in the result list.
	Cancel	Cancel the changes you made that were not yet saved.
	Delete	Move the document to the recycle bin. The recycle bin can be found in the Personal folders of the Tree Structure. *Click here for more information about the Personal folders*
	Check out	Check out the document. This allows you to create a new version. When the document is checked-out, the document icon will be for other users. *Click here for more information about checking-out documents.*
	Add file	Opens a pop-up window from where you can add a file to the document.
	Add mail	Opens a pop-up window from where you can send an e-mail message.
	Add comment	Opens a pop-up window in which you can enter new comments for the document..
	Comments	Opens the comments tab in the preview window on the right., which gives an overview of all existing comments and the possibility to add a comment. When comments are added, the comments icon will be . *Click here for more information about adding comment to a document.*
	Add message	Opens a pop-up window from where you can send an internal or external message.
	Messages	Opens the overview of the messages related to this document.
	Copy/Move to folder	Opens a pop-up window from where you can copy/move the current document or create a shortcut to it.
	Add to favorites	Add the document to your Favorites. *Click here to learn more about your Favorites*
	Add to favorites	Remove the document from your Favorites. *Click here to learn more about your Favorites*
	ACL Managment	View and set the security of the document. *Click here to learn more about security*
	History	Opens an overview of the document history in the preview window at the right.
	Version history	Shows the version history of the document in the preview window at the right.. *Click here for more information about Version Management*

File toolbar

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The file toolbar of the pop-up window contains the next buttons:

Overview and description of all icons of the file toolbar:

Icon	Name	Description
	Rename	Opens a pop-up screen in which you can rename the current file.
	Download	Opens a file download screen from where you can download the current file.
	Edit file	Opens a pop-up window from where you can edit the current file.
	Replace file	Opens a pop-up window from where you can upload a file to replace the current file as a the same version or as a new (sub)version.
	Check out	Checks-out the current file and opens it to edit.

5.3.3 Document detail – right mouse click

Depending upon user rights and application configuration, the right frame will show a list of tabs. By default, the next tabs are shown:

Preview: preview of the main file
(example)

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Details: all metadata of the document and a list of all files linked to the document
(example)

Links: list of linked documents
(example)

Version History: all previous versions of the document and its files
(example)

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Comments: list of comments for this document + the possibility to enter new comments
(example)

History: list of all actions done on the document and its files
(example)

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5.3.4 Document actions menu

By right-clicking on a document bar you can choose between different document actions in a menu.

Overview of the items in the document actions menu (context menu):

Action	Description
Document name	By clicking on this name, the preview pane is opened at the right side of the screen.
Open	By clicking on *Open*, the document will be opened in a new screen. On the left side of this screen you can see the document details. On the right side of the screen you see a preview of the main file. On top of this screen you can see a toolbar with icons to execute actions on the document.
Rename	Via this option you can rename the document.
Edit	Via the *Edit* button, you can change the document. When you edit a document without a check-out, the version number will be changed automatically (v. 1.0.0 becomes 1.0.1); you cannot keep the previous version of the document.
Delete	Clicking on this option will delete the document. A confirmation screen will appear. The deleted documents will appear in the Recycle bin. Via the Recycle bin you can restore the document or delete it permanently.
Check-out	If you choose this option, the document will be checked-out so you can edit the document and create a new version. Previous versions of the document will be available for other users. You can find your checked-out documents in the Personal folder *My Checked-out Documents*.
Unlock	This unlocks the document when it is locked by another user. When a document is Locked it means that another user is editing the document. This action only appears if the document is locked and you have enough rights to unlock it.
Add File	This option offers you the possibility to add a file to the current document.
Add to Favorites	This option adds the document to your Favorites.
Send by Email	Via this option you can send the document by Email.
View Previous File Versions	By choosing this option, the previous versions of the file will be shown.
Acl Management	Via this option, you are able to change the security setting of this document.

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6   Searching in DocRoom

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What you will learn

In this chapter you will:

- **Learn how to search in DocRoom**:
    - o   By using the tree structure
    - o   By doing a folder search based on metadata.
    - o   By using the global search screen.
    - o   By using the global search screen in combination with search operators.
    - o   By using the advanced search screen:
        - ▪   In general.
        - ▪   Only for documents.
        - ▪   Only for folders.

- **How to use search operators.**

- **All about saved queries:**
    - o   Learn how to create a saved query.
    - o   Learn how to use a saved query.
    - o   Learn how to add a saved query to the tree structure.
    - o   Learn how to subscribe to a folder or a saved query.

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6.1 Introduction
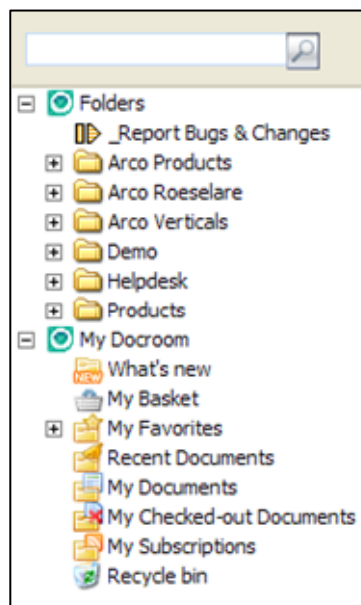
In DocRoom, there are several ways to find a (number of) document(s); you can:

    a. Browse in the tree structure
    b. Use a search screen:
          a. Global search ("Google-like" screen)
          b. Via the menu-item **Search**:
                 i. Advanced search:
                ii. On everything
               iii. On documents
               iv. On folders
                v. On Routing dossiers
               vi. Using saved queries

6.2 Browsing in the tree structure

- Interesting for users who are familiar with the structure of the tree.

- Disadvantage: you always browse to one specific folder and that content is shown. This means that all the information has to be stored in one folder to enable the user to retrieve all information in an easy way. (This is a limitation that we don't want to have in a document management system.)

- Dynamic folders can be an answer to the limitation mentioned above.

- Folders can carry metadata so that it can be considered as a dossier.

  E.g.: it is possible to create a folder per customer, containing all documents related to this customer. The folder itself then can carry metadata like customer name, address, contact, etc.

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6.3 Folder Search on folder name

- Good tool to quickly retrieve a specific folder in a huge folder structure.

- The user must know (a part of) the **folder name** so that he/she can search on the folder.

- Also entering a part of a folder name gives a result.

- Disadvantage: you are searching on folder level; all Information has to be stored in one folder to enable the user to retrieve all information in an easy way.
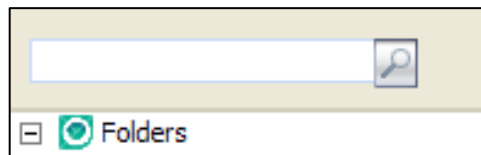
6.4 Folder Search on folder metadata

- Only possible when properties are defined for the foldertype.
- Interesting way to search a folder based on a metadata search – more possibilities than search only on folder name.
- Search is done by using a search screen.

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6.5 Global search

Global search = "google-like": 1 search field where you can enter your search criteria:

- Search is active in the folder selected in the tree structure.

- Subfolders are included in the search.

- Possibility to use search operators.

- Search is executed on all metadata of the documents and folders + on full text where possible.

- Result = "global", since you are searching on a lot of indexes and on full text

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6.6 Advanced search

The next *Advanced Search* windows can be found in the menu-item **Search**:

Everything : search for metadata of folders and documents

Documents : search for metadata of documents

Folders : search for metadata of folders of the tree structure

Routing Dossiers : search for metadata of routing workflow dossiers

<u>**Example**</u>**: search for the word *arco*.**

Nice to know

In the default search window, all "pool properties" will appear. Pool properties are the index fields that can be used for all document and folder types.

Most of the times when you select a document type or a folder type in the search window, other search fields will appear: these fields are created specifically for the selected document or folder type and can only be used to search on that particular folder or document type.

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6.7 Search operators (Wildcards)

Search operators or wildcards are instructions that can be used to join keywords to form a new, more complex query.

It enables you to look for several words at once by telling the system how to link keywords. The most common search operators are the three Boolean operators (AND/+, OR and NOT/-) which allow the inclusion or exclusion of documents from the search results.

Overview of the search operators / wildcards that can be used in DocRoom:

% or *
Character that replaces dat 0 or more characters.
Example: *bruss%, bruss* → will find all the items taht contain words that begin with the letters bruss. As a result, it will show e.g. Brussel, but also brusselse, Brussels, etc.*

_ (underscore)
Character that replaces exactly 1 character.
Example: *brussel_ → will show all items that contain words that begin with brussel and then have exactly one letter after it.* *Result will show e.g. Brussels, but not Brusselse.*

\<space\> or AND
Indicates that all terms that are linked by the search operator have to be found.
Example: *Brussel Elsene, Brussel AND Elsene → Both words Brussel and Elsene have toappear in the found document.*
Mind! *This does not mean that both words have to appear next to each other in the item, they only have to be found in it.*
An example: *When you search George Bush, you will also find the item that contains the next phrase: George was hiding behind a bush, since both words are found.*

OR
Indicates that at least one of the items that are linked by the search operator have to be found in the document.
Example: *Brussel OR Elsene → At least one of the two words (Brussel or Elsene) have to be found in the item. If both words are found in the item, it will of course also be shown in the result list.*

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– or NOT

This search operator excludes words: the word that follows this search operator must not be found in the item.

Example: *Brussel – Elsene, Brussel NOT Elsene → The word Brussel has to appear in the found item, but it must not contain the word Elsene. All items that contain both words, are not shown in the result list.*

"" (Phrase search)

By putting double quotes around a set of words, you are telling the system to consider the exact words in that exact order without any change.

Example: *"Brussel – Elsene" ,in this search the search operator – is not considered as a search operator, since it is located in the phrase search. Only items that contain the phrase Brussel – Elsene will be shown in the result..*

An example: Search for 328C/51242051-P-2-01

- If you enter the search value **328C/51242051-P-2-01** in a search field, you will look for: *%328C/51242051% AND NOT %P% AND NOT %2% AND NOT %01%*

  You will find documents that start with **328C/51242051**
  But that don't contain **P-2** or **01**. (You will not find what you are looking for)

- If you enter the search value **328C/51242051-P*** in a search field, you will look for: **%328C/51242051% AND NOT P%**

  You will find documents that start with **328C/51242051**
  But that don't contain words that start with **P with another letter combination following**. (You will not find what you are looking for)

- If you enter the search value **"328C/51242051P-2-01"** in a search field, you will look for the *exact* value **328C/51242051-P-2-01.**

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Overview of the date search operators / wildcards that can be used in DocRoom:

Different date formats:
10-2-08   10-2-2008   10-02-08   10-02-2008 10/02/2008   10/02/08   10/2/08   10/2/2008

Operators   >   >=   <   <=
Search for: **<**   **items with an earlier date that the one mentioned behind this operator** **<=**   **items with an date earlier than or equal to the one mentioned behind this operator** **>**   **items with an later date that the one mentioned behind this operator** **>=**   **items with an date later than or equal to the one mentioned behind this operator** *Example: >=10-2-07*

, (komma)
Will search for all dates that appear in the period defined by the search, i.e. a date that lies between the date before the comma and the date after the comma. *Example: 10-2-07, 10-2-08*

- (minus)
Will search for all dates before the mentioned date. *Example:*   >-7 (all documents between now and 7 days ago)   <-7 (all document s older than 7 days)

Nice to know
An overview of the search operators can also be found in the DocRoom webhelp.

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6.8   Saved query

DocRoom allows you also to create:

- Saved queries

- Saved queries in the tree structure

- Specific search screens, e.g. linked to a document type

6.8.1   Exercise – Create a saved query

a.   Select the folder **Demo** in the tree structure. This is the folder where you want to execute your query.

b.   Select the option **Search / Search invoices** in the menu bar.

c.   The search invoices screen appears: select the option *Invoice* in the search field *Invoice type*.

d.   Click on the option **Save** at the bottom of the window.

e.   The *Save query* window appears:

f.   Select the option *Private*: this means that your saved query is only available for your user.

g.   Select the option *On this folder*: this means that the query is always executed on the folder that is currently selected.

h.   Enter the name for the saved query: search invoice student [your student number].

i.   Click on the option *Save* in the right lower corner.

j.   The *Save query* window closes. You return to the **Search Invoices** search screen.

k.   Click on the option *Open* to see an overview of saved queries.

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6.8.2 Exercise – View the list of saved queries and re-execute one

a. Select the option **View / Saved queries** in the menu bar.

b. An overview of saved queries will appear:

c. Click on the query name to execute the saved query.

6.8.3 Explanation of the saved queries overview

(1) Name

Name of the saved query. When you click on the name, the query is executed and the result screen will appear.

(2) Query Type

Public	Available for all users
Private	Available only for the creator
Secured	Available for a pre-defined group of users. Not everyone can create secured queries.

(3) ✎ Edit

Click here to edit the settings of the saved query.

(4) 🗑 Delete

Delete the saved query.

(5) 👥 ACL

Define which users can:
- Edit the query.
- Run the query.
- Run a query subscription.

(6) 🔲 Subscribe

Click here to subscribe to the saved query. You will receive an e-mail message when new items have been found by the query.

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6.8.4   Exercise – View the list of saved queries and put your saved query in the tree structure

a. Select the option **View/ Saved queries** in the menu bar.

b. An overview of saved queries will appear:

Name				
My Query 01 (Secured)		✏	🔄	👥 📶
Student (Public)		✏	🔄	📶
🔍 search invoice trainer (Private)		✏	🔄	📶

c. Put the cursor on the search icon 🔍 in front of your saved query.

d. Drag it to the root folder of the tree structure. (press the right mouse button, move your cursor to the root folder **Folders** of the tree structure and release the right mouse button.)

⊟ 🔵 Folders
        📄 *search invoice trainer*
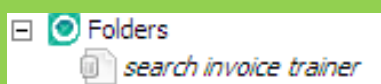
e. Your saved query will now appear as a folder in the tree structure. When clicked upon, the saved query will be re-executed and the result will appear in the result list.

6.9   Push information - Subscriptions

You can subscribe to a folder or a saved query.

This means that you indicate that you're interested in the selected folder/query and that you want to be informed when new items have been added to the folder or have been found by the selected query.

The system will send you an e-mail when new information is available. The interval of the sending of this e-mail depends upon the configuration of the batch job *send subscriptions*. (configured by the application administrator)

An overview of all your subscriptions is found in the tree structure in **My DocRoom / My subscriptions**.
Here you can also unsubscribe.

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6.9.1 Exercise – Subscribe to a folder

a. Select the folder **Training Exercises** in the tree structure.

b. The folder content appears in the result list.

c. In the result list, put the cursor on the subfolder that was created by you (Student NN) and click on the right mouse button.

d. A menu appears: select *Subscribe*.

e. A pop-up window with the message *Your subscription has been created* appears. Click on the button **OK** to close the window.

6.9.2 Exercise – Subscribe to a saved query

a. Select the option **View/ Saved queries** in the menu bar.

b. An overview of saved queries will appear:

c. Click on the subscribe icon at the end of the row of the saved query.

d. A pop-up window with the message *Your subscription has been created* appears. Click on the button **OK** to close the window.

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7   Edit documents

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What you will learn

In this chapter you will learn all about editing documents and files:

- The difference between edit & check-in/check-out
- How to edit a document
- How to edit a file

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7.1   Introduction

A DocRoom user can edit a document (if he/she has the necessary rights to do so).

Depending upon the DocRoom configuration, the user will be able to save a new version of the document directly or after check-in/out. When check in/out is involved, version management is active and all previous versions will be kept. In that case, the changes are saved as a new (sub)version of the document.

Direct edit or edit after check-out is also available on file level.

Which options are available for your user, depends upon your security settings. In the action profiles, the application administrator can define whether or not you can/cannot edit a document directly or after check-out.

When a document or a file is edited, the version number of it changes.

The version number contains 3 digits: 1.0.0.
After edit, one of these three numbers will change, depending upon the way the document / file is edited.

Since a document can contain more than one file, both items can be edited independently.

When you edit a document, you edit the meta data.
When you edit a file, you edit the content of that file.

Files can be checked out independently.
When you check out a document, the files linked to it are checked out automatically also.

7.2   Edit – how to edit your document (without versioning)

- To edit a document, you can select the option *Edit* in the menu that appears when you point your cursor on the document title and click on the right mouse button: the document will be immediately available for editing.
- To edit a document, you can select the option *Edit* in the menu that appears when you point your cursor on the file name and click on the right mouse button: the file will be immediately available for editing.

- The new version will be kept – it will overwrite the previous one.
- The last digit of the version number will change: 1.0.0 becomes 1.0.1.

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7.2.1   Exercise – Direct edit of a document

a. Search the document *Document to be edited* and copy it to the folder
Training exercises \ Student (your number) \ Move Student (your number) .
Notice that the current version is 1.0.0.

b. Click on the document title and click on the right mouse button. In the menu that appears, select the option **Edit**.

c. The document detail window appears in edit mode: all properties can be changed in the left pane. In the right pane, you can see a preview of the file content.

d. Add the word **changed** to the document name and save by clicking on the save icon (🖫) in the toolbar.

e. Close the window.

f. Click on the **version history icon** 📅 to visualize the version history or open the version history as described below:

   a. In the result list, click on the title of the document that was changed.
   b. In the right part of the screen, a pane appears, containing different tabs: Preview, details, links, version history, comments and history
   c. Click on the tab **Version History** to visualize its content.

g. You will notice that:
   a. The document version number has changed to 1.0.1.
   b. The new version is saved and has overwritten the previous version.

7.2.2   Exercise – Direct edit of a file

a. Put the cursor on the **Word icon** of the document *Document to be edited* and click on

b. A menu appears: select the option **Edit**.
c. The file content is opened in a new window.
d. Make your changes and click on the **Save** icon.
e. Close the window.
f. Look at the version number of the file.
g. You will notice that:
   a. The version number of the file has been changed into 1.0.1.
   b. The new version has been saved. It has overwritten the previous one.

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8   Version management

What you will learn

In this chapter you will learn all about version management:

- What is check-in/check-out
- How to check-out a document
- How to check-out a file

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8.1   Check-in / Check-out

- When DocRoom needs to keep older versions available, the check-in/check-out option needs to be used.
- Users needs to check-out the document before editing; the status icon of the document will change from available to "checked out" (). This icon indicates to other users that someone is working on the document.
- For the user who has checked out the document, it will have the edit status (). Also the files linked to the document will be checked-out.
- After check-out, put your cursor on the document title again and click on the right mouse button. In the menu that appears, select the option **Edit**.
- The document details appear in a new window.
- Make your changes and save by clicking on the save icon () in the toolbar.
- Now check-in the document: put your cursor on the document title again and click on the right mouse button. In the menu that appears, select the option **Check in**.
- The check-in window pops-up:
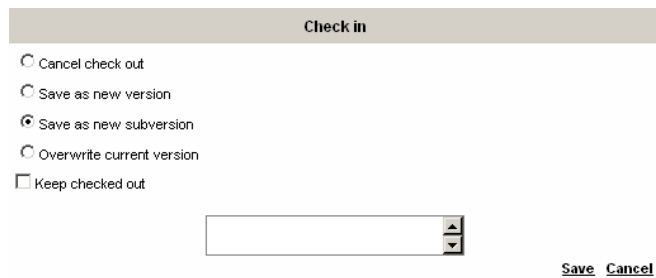
- Check in as a new subversion or as a new version.
- New subversion: second digit changes: 1.0.0 becomes 1.1.0
- New version: First digit changes: 1.0.0 becomes 2.0.0.

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8.1.1 Exercise – Check out Document, edit and publish new version

a. **Check out the document**
   a. Put the cursor on the document title of the document *Document to be edited* in the folder:
   Training exercises \ Student (your number) \ Move Student (your number)
   b. Click on the right mouse button.
   c. A menu appears: select the option **Check out**.
   d. A window with the message *Document checked out* appears.

b. **Edit checked out document**
   a. Put the cursor again on the document title and click on the right mouse button.
   b. A menu appears – select the option **Edit**.
   c. The window with the document properties appears.
   d. Add the number **2** to the document name and save by clicking the **save** icon in the toolbar.

c. **Check in the document**
   a. Click on the **check in** icon in the toolbar.
   b. The **Check in** window appears. Select the option **Save as new subversion**.
   c. Add the comment **exercise version management** to the text field below the options.
   d. Click on the option **Save** in the right lower corner.
   e. The check in window closes and the metadata of the document appear in read only modus.
   f. Click on the version history icon to view the version history of the document or open the same window this way:
      i. In the result list, put the cursor on the document title of the document that has been changed. Click on the left Mouse button.
      ii. A right pane appears, containing the tabs Preview, details, links, version history, comments and history.
      iii. Click on the history tab.
   g. You will notice that:
      i. The version number of the document has been changed into 1.1.0.
      ii. The new subversion has been saved, but it remains possible to view the previous version.
      iii. The check-in comments appear in the column **check-in comments**.

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