



Arco

Doma 6

Application administrator manual

06. DocRoom Categories

A new era in document management.

Doma 6

Application administrator manual

06. DocRoom Categories

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1 Introduction

1.1 Overview

A category within DocRoom is the definition of an object type, with its properties, screens, events, workflow procedures, icons, ...

The categories can have their own properties, and have shared properties (= pool properties).

Next to this, also specific screens and actions can be linked to the categories, so search screens, insert screens, edit screens, ..., events, procedures (for inserting, deleting, checking out) can be different for each category defined in DocRoom. The options available will depend on the category type.

 Document Category	 Folder Category	 Workflow Category	 Dossier Category	 Procedure Category
Document Category properties	Folder Category properties	Workflow Category properties	Dossier Category properties	No Category properties
No Procedure Category properties	No Procedure Category properties	Procedure Category properties	No Procedure Category properties	Procedure Category properties
Pool properties				No Pool properties

Arco DocRoom defines 5 different categories:

- Document category, defining the properties, screens... for a document. A document category is a specific document type, e.g. "invoice", "PO", etc.
- Folder category, defining the properties, screens ... for a folder. A folder category is a specific folder type, e.g. "personnel folder", "customer folder", etc. A folder can contain other folders, Workflows, Documents, Dossiers. A folder can then be seen as a *physical* container of DocRoom items.
- Workflow category, defining a workflow with as end result a DocRoom object (Workflow) .
- Dossier category handles the concept of dossiers, like a Purchase dossier, Contracting dossier, ... The items in a dossier can be situated in any folder of the DocRoom tree; therefore, a dossier can be considered as a *logical* collection of DocRoom items. The items are physically stored in folders and linked as items to a dossier.
- Procedure category. This category defines a workflow procedure. A workflow started according to a procedure category does not create a DocRoom object as end result. Only logging of the actions in the procedure is kept.

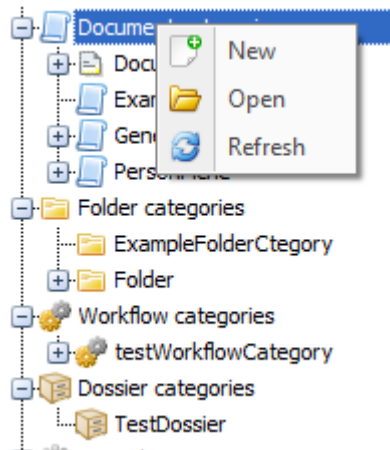
Remark:

Please see the manual *Doma 6 - Application Administrator Manual - 05 – Routing procedures and workflow categories* for more information about the procedures.

2 General configuration

2.1 Introduction

The configuration of the categories is done in the Doma Admin module.



- Double-click on the item of the DocRoom category you want to create in the navigation tree of the Doma Admin module to see an overview of the existing categories of that type
- OR
- Select the the DocRoom category in the navigation tree of the Doma Admin module and click on the right mouse button. A menu appears. Choose New to create a new DocRoom category, Open to open the list of existing categories (e.g. to edit a document category.)

2.2 Basic configuration




All categories require a basic configuration. Next to this basic configuration, the categories have their own specific configuration possibilities.




Below we give an overview of the basic configuration. The fields mentioned in this overview will be available for all categories.

2.2.1 Toolbar

The toolbar in the category screens will vary depending on the context of the screen.

Following items are always available:

Icon	Description
	Saves your changes.
	Saves your changes and closes the tab.
	Creates a new category in the current tab.

	Deletes the category.
	Export the category to a file.
	Close the current tab.

2.2.2 Tab Category

This tab contains the main configuration items of the category. It appears initially together with the tab *Translation*. After save, other tabs will appear.

A number of fields are available for all Category types. These are explained here below.

Field name	Description
ID	<i>Internal system identification number</i>
Name	<i>The name of the category</i>
Icon	A custom icon (.ico,.gif,.png) can be selected as icon for this category. The ideal dimension of the icon file is 16*16 pixels. The icon files have to be stored in the predefined [domaroot]\web\DocRoom\TreeIcons directory
Type	<i>Document, Folder, Dossier, Case (=workflow category)</i>
Auto name	<i>RequiredName: a name is required when creating an instance of the category</i> <i>EmptyName: a category instance will be created without a name</i> <i>GUIDName: a GUID will be generated as name or the category instance at creation.</i> <i>OptionalName: a name for the category is optional</i> <i>Remark: not all options are available for all categories</i>
Disable manual creation	<input checked="" type="checkbox"/> Instances of this category cannot be created manually in the web interface. They can only be created programmatically

or using DRUM (DocRoom Upload Module)
☐ Instances of this category can be created manually in the web interface

List Info

The listinfo fields are generalization fields that can be shown especially on general result lists. These fields can contain specific information for the category. The fields will be automatically filled with the data as defined in this screen.

Three listinfo fields can be defined

Enter the definition of the listinfo field. The following can be used:

- Literal (e.g. Productinfo)
- DocRoom constants (e.g. #OBJ_NAME#)
- *References to other properties using the `[@prop_name@]` syntax*

Example: Productinfo: `[@strPropProductId@]` - `[@strPropProductName@]`

Category Type handler

Field name	Information
Handler	If a Category Type Handler for this category is needed, it has to be selected here from the Category Type Handlers registered in DomaAdmin.

2.2.3 Tab translation

This tab contains the translated labels of the category name and the tooltip that appears when the user puts the cursor on the icon of an instance the category in the web interface.

If the DocRoom interface is presented in different languages, the category names and tooltips can be translated in the languages that are used.

When the web user selects another language, the label will then appear in the selected language (if the language labels are completed).

A tooltip appears when the user puts his/her cursor on the icon of the category in the web interface.

If the translated label/tooltip is not entered in the Translation fields, the Name of the category is used as label/tooltip in the web interface.

You can enter the translations in the language fields under the header *Name*.
You can enter the translations of the tooltips in the language fields under the header *Tooltip*.

2.2.4 Tab Properties

This tab shows an overview of all properties that are linked to (used in) the category.

NAME	TYPE	LENGTH	VIRTUAL
poolAddress	String	200	<input checked="" type="checkbox"/>
poolAutonumber	Auto number	10	<input type="checkbox"/>
test	String	2000	<input type="checkbox"/>

Using the toolbar, the user can

- Create new category properties
- Add, remove pool properties to this category
- Edit properties that are related to this category
- Delete properties that are related to this category.
- Convert properties from pool properties to category properties and vice versa
- Copy a property
- Move a property

In the overview, pool properties are shown in **bold**.

2.2.4.1 Add a property

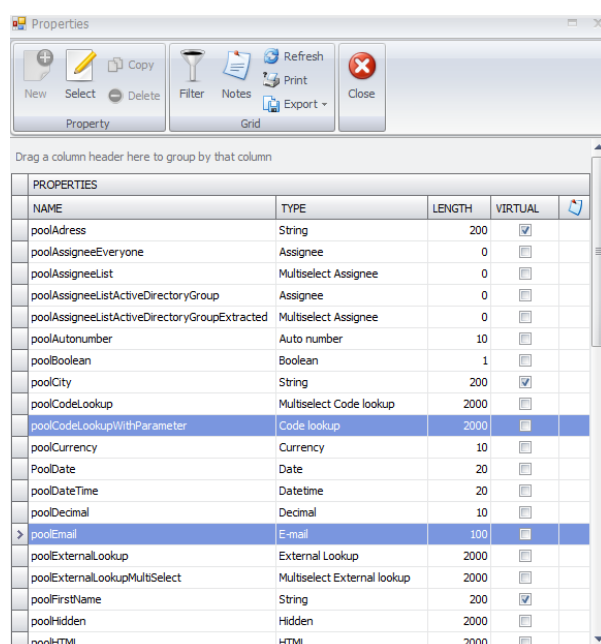
In order to add a new category property, click on the New Category button in the toolbar:
A new tab in DomaAdmin will be opened, where the property can be configured.

Remark:

Please see the manual [Doma 6 - Application Administrator Manual - 04 - Properties and Edit checks](#) for more information about properties.

2.2.4.2 Add a pool property

In order to add a pool property to this category, click on the Add pool property button in the toolbar. A new window will open, where the existing pool properties can be selected for adding:



Select the pool properties to be linked to the category, and click on select. More properties can be selected at the same time using the CTRL and SHIFT keys.

2.2.4.3 Edit a property

In order to edit a category or pool property, select the property and click on the Edit button in the toolbar:

A new tab in DomaAdmin will be opened, where the property can be configured.

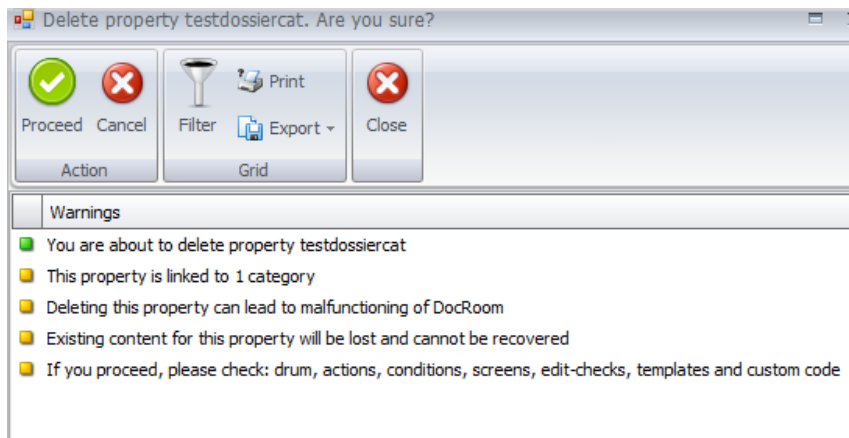
Remark:

Please see the manual [Doma 6 - Application Administrator Manual - 04 - Properties and Edit checks](#) for more information about properties.

2.2.4.4 Delete a property

In order to delete a category property, select the category property and click on the Delete button in the toolbar:

A new window will open to confirm the deletion:

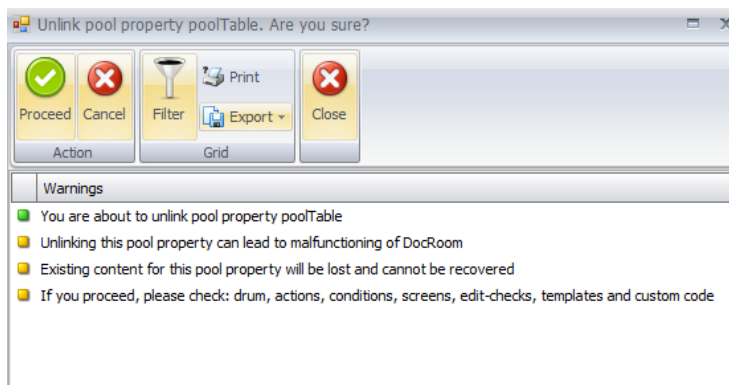


Click on Proceed to confirm the deletion.

2.2.4.5 Unlink a pool property

In order to unlink a pool property, select the pool property and click on the Delete button in the toolbar:

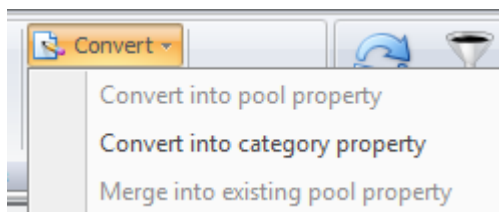
A new window will open for confirmation:



Click on Proceed to confirm the unlinking of the pool property.

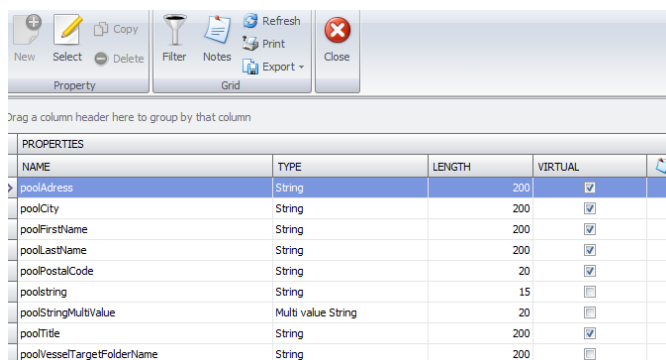
2.2.4.6 Convert properties

The following conversions of properties are possible:



- Convert a category property into a pool property: select a category property. Then click on the 'convert into pool property' entry of the convert menu.

- Convert a pool property to a category property: select a pool property that is linked to this category only. Then click on the 'convert into category property' entry of the convert menu.
If the property is linked to different categories, conversion will not be allowed.
- Merge a category property into an existing pool property: select a category property. Then click on the 'Merge into existing pool property' entry of the convert menu. A window will be opened with the available pool properties of the correct type.



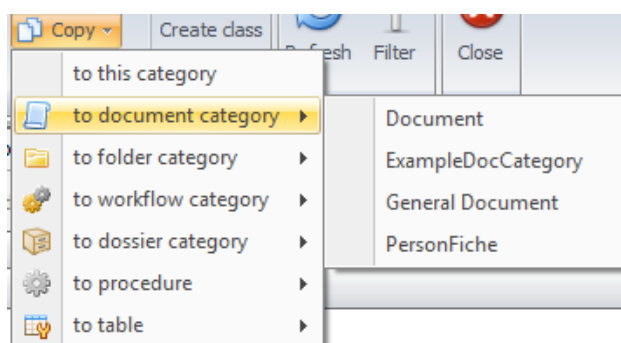
NAME	TYPE	LENGTH	VIRTUAL
poolAddress	String	200	<input checked="" type="checkbox"/>
poolCity	String	200	<input checked="" type="checkbox"/>
poolFirstName	String	200	<input checked="" type="checkbox"/>
poolLastName	String	200	<input checked="" type="checkbox"/>
poolPostalCode	String	20	<input checked="" type="checkbox"/>
poolString	String	15	<input type="checkbox"/>
poolStringMultiValue	Multi value String	20	<input type="checkbox"/>
poolTitle	String	200	<input checked="" type="checkbox"/>
poolVesselTargetFolderName	String	200	<input type="checkbox"/>

Select the pool property, and click on Select. The category property will be replaced by the selected pool property.

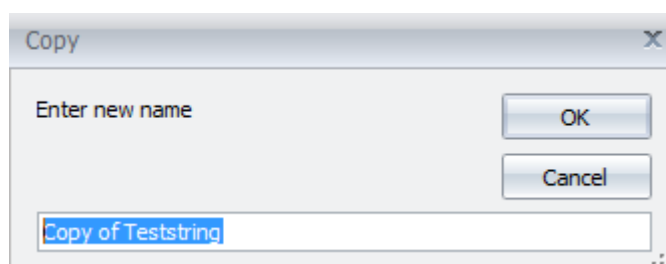
2.2.4.7 Copy properties

Properties can be copied between the different categories. A new property will be created for the target category, having the same configuration of the property being copied.

In order to copy a property, select the property and click on the Copy button in the toolbar. A menu with the possibilities will be shown.



- To this category: make a new category property in this category. A window will be opened for entering the property name.



The 'Copy' dialog box contains the following elements:

- A title bar with the text 'Copy' and a close button (X).
- A label 'Enter new name'.
- An 'OK' button.
- A 'Cancel' button.
- A text input field containing the text 'Copy of Teststring'.

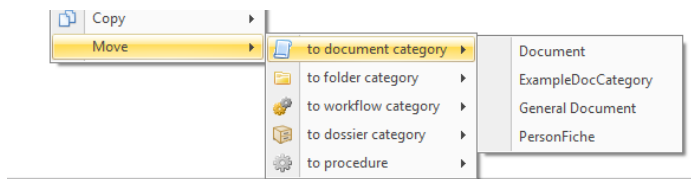
- To document category, to workflow category ... In case you want to copy this property to a different category, select the category type and the target category.

- To table: this option is only enabled when a table property exists in the category. Using this option, the property can be copied to the table property, as a column.

2.2.4.8 Moving properties

Properties can be moved to a different category. A new property will be created for the target category, having the same configuration of the property being moved. The source property will be removed.

In order to move a property, select the property and click on the Copy button in the toolbar. A menu with the possibilities will be shown.

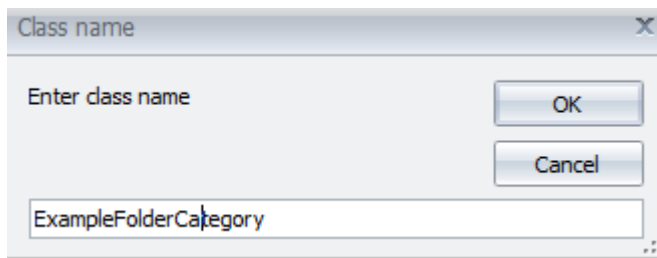


- Select the category type and the target category from the allowed options.

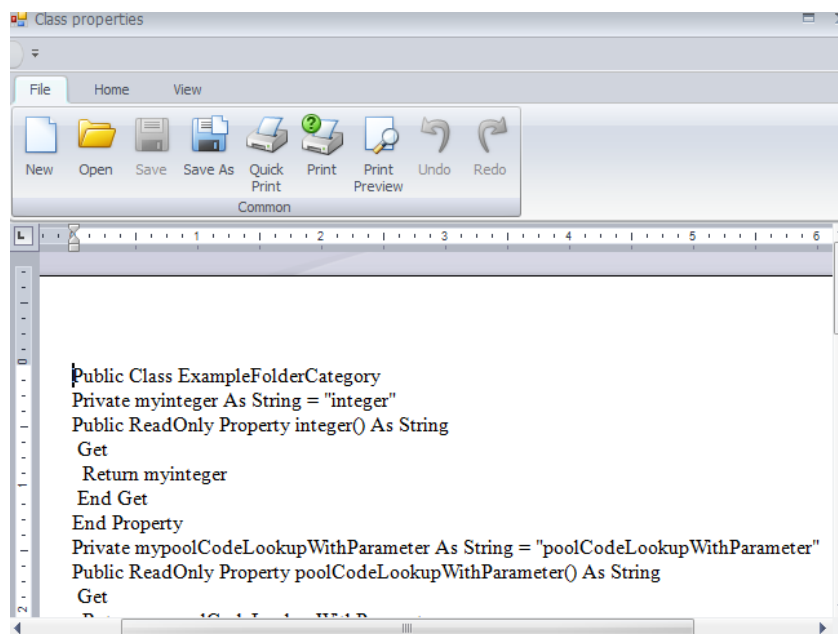
2.2.4.9 Create a .net Class for a DocRoom category

Click on the Create class button in the toolbar in order to generate a template for a .net Class for the category and its properties. A text document will be generated with the class definition. This can be used as a start for programming.

A class name will be asked



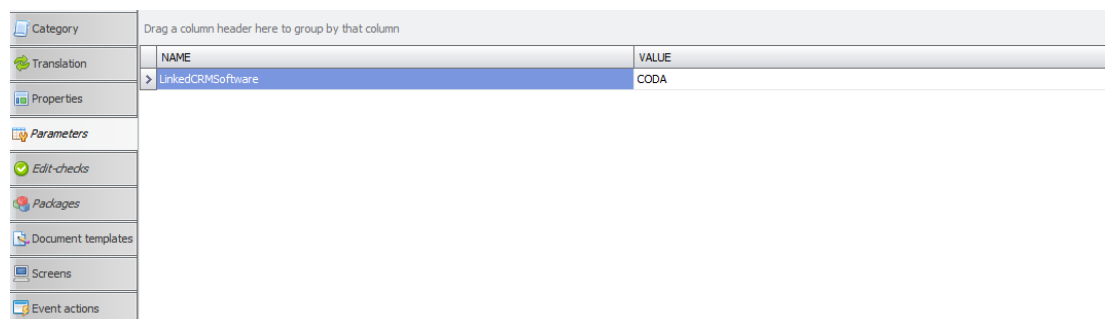
And the code is generated:



2.2.5 Tab parameters

Category parameters can be used as an alternative for arcoinfo. These parameters can be used in scripts as normal properties (via the GetProperty or GetParameter method). These parameters should be used as procedure/category **constants**.

The parameters are

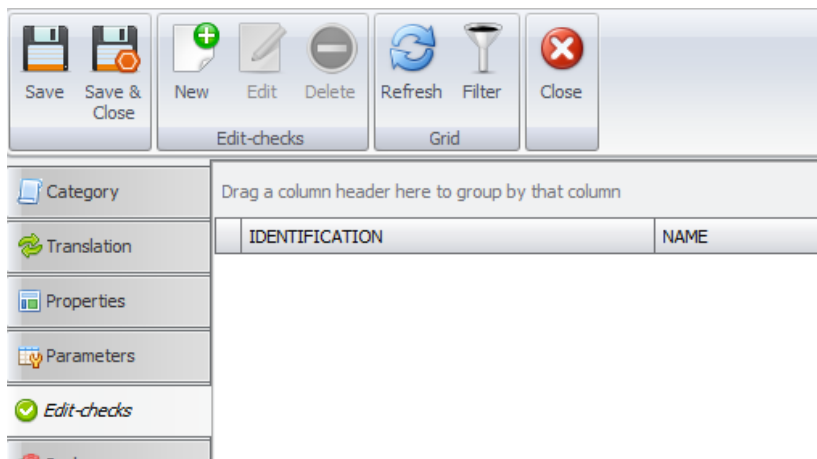


Field name	Information
Name	Name of the parameter.
Value	Value of the parameter.

Example: Give the name of the linked CRM system as a parameter. The same definition of the DocRoom category can then be implemented in various DocRoom implementations, with parameterization (in code, events...) depending on the linked software.

2.2.6 Tab Edit Checks

This tab allows the user to create, modify and delete Edit Check definitions for the DocRoom category.



Using the toolbar, the user can



- Create new edit checks related to this category.
- Edit edit checks related to this category.
- Delete edit checks related to this category.

Remark:

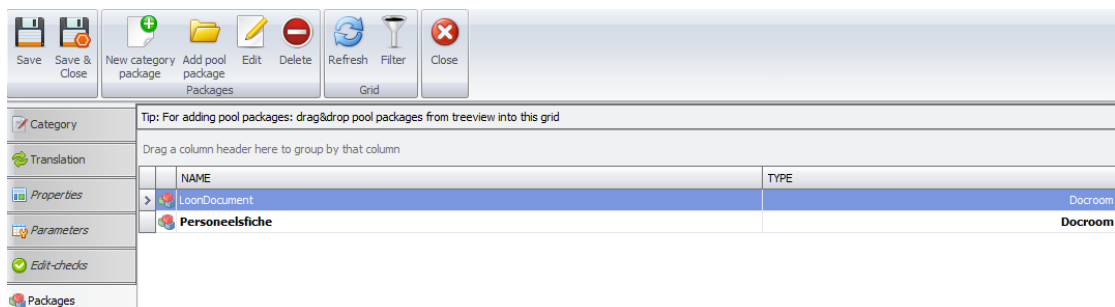
Please see the manual *Doma 6 - Application Administrator Manual - 04 - Properties and Edit checks* for more information about edit checks.

2.2.7 Tab Packages

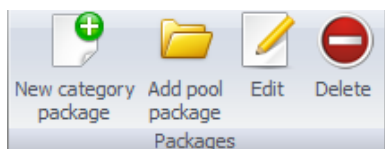
This tab shows an overview of all packages that are linked to (used in) the category.

Packages are placeholders for:

- DocRoom documents
- Routing cases
- Sharepoint documents
- DocRoom queries
- CaseQueries



Using the toolbar, the user can



- Create new category packages
- Add, remove pool packages to this category
- Edit packages that are related to this category
- Delete packages that are related to this category.

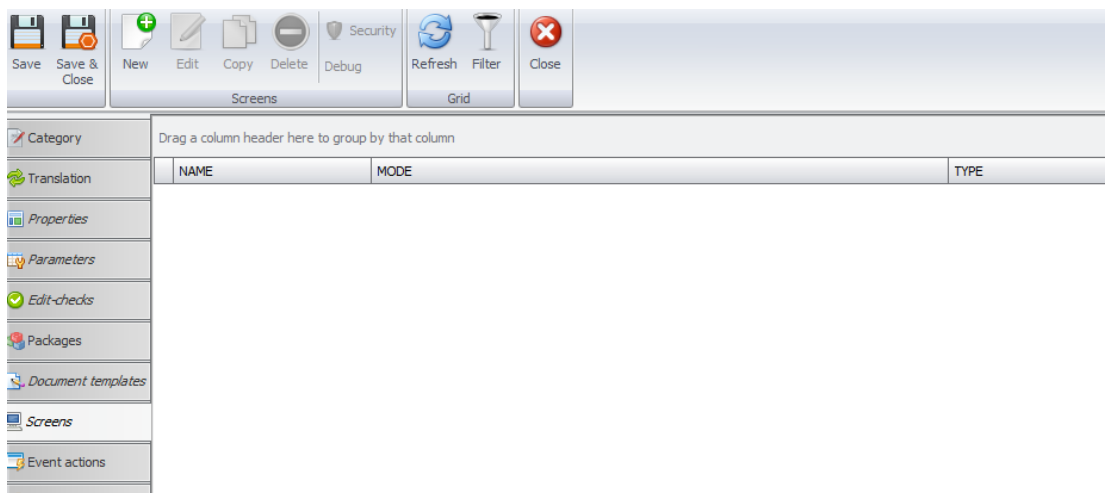
In the overview, pool packages are shown in **bold**.

Remark:

Please see the manual [Doma 6 - Application Administrator Manual - 05 - Packages](#) for more information about packages.

2.2.8 Tab Screens

This tab shows an overview of all screens defined for the category.



The columns show the following information:

Field name	Information
Name	Name of the screen.
Mode	The screen mode: INSERT, UPDATE, DETAIL, INSERTUPDATEDDETAIL, QUERY, RESULT, TOOLTIP, USEREVENT, ...
Type	Mode of the screen (DefaultMode, Templatefile, Url,...)

Using the toolbar, the user can



- Create new screens for this DocRoom category
- Edit screens for this DocRoom category
- Copy screens for this DocRoom category
- Delete screens for this DocRoom category
- Set security on screens for this DocRoom category
- Debug screens event handlers
- Set security on the screens

2.2.8.1 Screen Tab

Field name	Information
Name	Name of the screen.
ID	Internal system ID of the screen
Category	The name of the DocRoom category the screen is linked to
Procedure	The procedure name the screen is linked to (in case of procedure steps)
Screen Mode	The screen mode as selected at creation of the screen <ul style="list-style-type: none"> • UPDATE: definition for the screen being used to modify detail data for an instance of the DocRoom category • DETAIL: definition for read only the screen being used view detail data for an instance of the DocRoom category • QUERY: definition for the screen being used for querying for objects the DocRoom category • RESULT: definition for the screen being used as result screen. • TOOLTIP: definition for the screen being used as tooltip window • INSERTUPDATEDETAIL: screen being used when inserting/modifying detail data for an instance of the DocRoom category. This screen definition will be overruled by the INSERT, UPDATE, DETAIL screens (when defined) • FOLDERTEXT: folders categories only. Definition of the FOLDERTEXT screen. Make sure foldertext is also enabled in the resultsgrid.xml file of the site • USEREVENT: definition of the screen shown when an user event is defined for the category, using an extra Form (Require Valid form Entry in user event definition is checked)
Screen Type	DefaultMode: the screen will be rendered as defined here Templatefile: obsolete Url: the URL defined here is rendered with the OBJECT_ID of the instance added as a parameter. Complete custom screens can be created this way, having the category instance id as a parameter.
Screen source	The source XML file for result screens
Default	<input checked="" type="checkbox"/> When more screens are defined (for example more result screens for

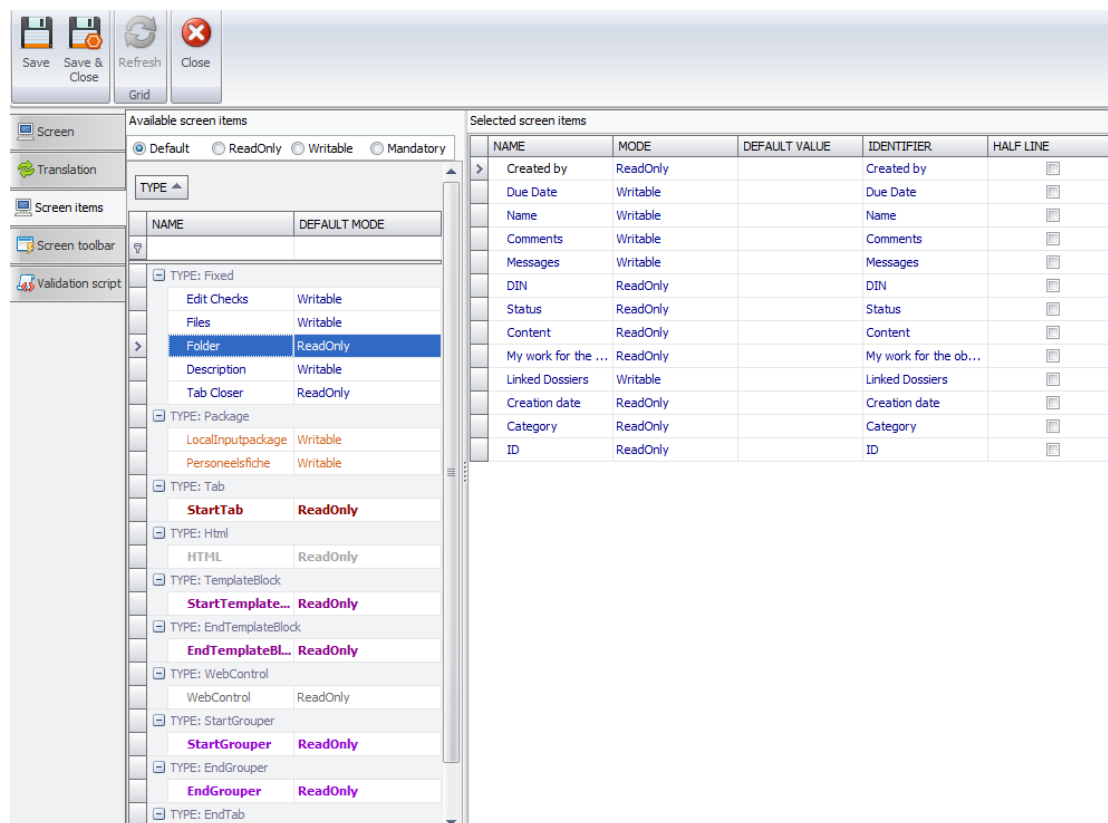
	the same DocRoom category), having different security settings, this screen will be the default when more security settings apply for the user in the web interface <input type="checkbox"/> Not the default screen.
Default preview	Nothing: no preview window Files: the first file of the category will be shown in the preview tab Packagename: the first file of this package will be shown in the preview tab
Assembly Name	Select here the assembly name for the custom screen handler
Class Name	Select here the class name within the assembly for the custom screen handler
Filter	Not Used

2.2.8.2 Tab Translation

Enter the name of the screen for the different languages implemented. If no data is entered, the name of the screen is used.

2.2.8.3 Tab Screen items

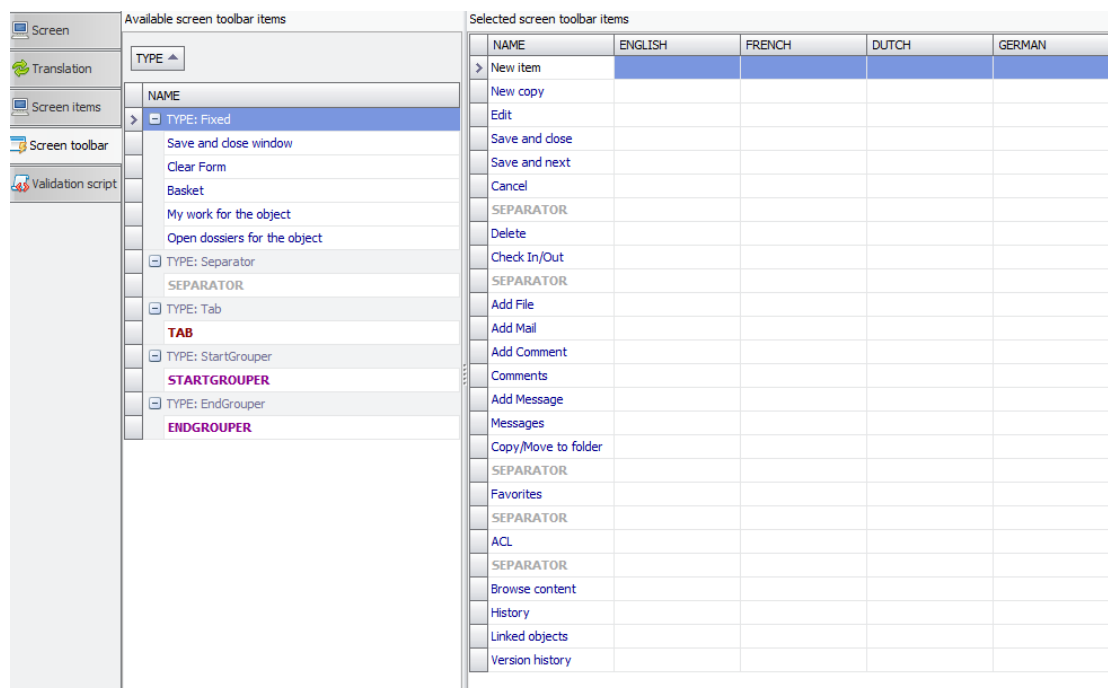
In this tab can be defined which items will be shown in the screen.



The user can select the available items at the left side, and drag them to the right side. Only the items in the 'Selected screen items' columns are shown in the web interface.

2.2.8.4 Screen toolbar

In this tab can be defined which items will be shown on the toolbar of the screen



2.2.8.5 Validation script

Here you can add custom JavaScript code for validation of input.

Screen		0/200
Translation		
Screen items		
Screen toolbar		
Validation script		

2.2.9 Tab Event Actions

Overview of all event actions for this category.

An event action is a pre-configured action that will be executed on a pre-defined event. Both event and action are configured in this tab.

From here you can:

- Add an event action.
- Edit an event action.
- Delete an event action.

2.2.10 Tab User Events

Here you can create a user event for the category. When defining a user event, you create a toolbar button or a context menu item. After the creation of the button and/or context menu item, you will define one or more actions that will be linked to this button and/or context menu.

Remark:

To be able to use the event action button in the toolbar, it has to be defined as a screen action in the screen detail.

2.2.11 Tab Event Handlers

Event handlers are pre-defined code which can be linked to a certain DocRoom category. The code is programmed in dotnet and will be provided as a dll. In this tab, you can link an event handler to this procedure.

2.2.12 Tab Notes

Tab where administrators or developers can add notes about changes and configurations that were made on this level.

Category	Drag a column header here to group by that column	
Translation	DATE	CREATOR
Properties	2012-08-23 15:27:00	ARCOFERDY
Parameters	A note for documentation	
Edit-checks		
Packages		
Document templates		
Screens		
Event actions		
User events		
Event handlers		
Notes		

2.2.13 Tab Audit

This tab gives an overview of all modifications on this DocRoom category..

Doma 6_Application Administrator Manual_06_DocRoom Categories.docx

Category	Drag a column header here to group by that column						
	USER	PROGRAM	ACTION	OBJECT	TYPE	DATE	DESCRIPTION
Translation	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134289	SCREEN	2012-08-27 16:34:00	Updated screen testTOOTIPScreenExampleDocCat
Properties	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134292	SCREEN	2012-08-27 16:10:00	Updated screen testINSERTUPDETEDETAILExampleDocCat
Parameters	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134292	SCREEN	2012-08-27 16:09:00	Updated screen testINSERTUPDETEDETAILExampleDocCat
Edit-checks	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134292	SCREEN	2012-08-27 16:08:00	Updated screen testINSERTUPDETEDETAILExampleDocCat
Packages	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134292	SCREEN	2012-08-27 16:07:00	Updated screen testINSERTUPDETEDETAILExampleDocCat
Document templates	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134292	SCREEN	2012-08-27 16:06:00	Updated screen testINSERTUPDETEDETAILExampleDocCat
Screens	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134292	SCREEN	2012-08-27 16:05:00	Updated screen testINSERTUPDETEDETAILExampleDocCat
Event actions	ARCO\FERDY	Arco.ApplicationServer.Service	INSERT	134297	SCREEN	2012-08-27 16:03:00	Inserted screen testUSEREVENTScreenExampleDocCat
User events	ARCO\FERDY	DomaAdmin	DELETE	134264	SCREEN	2012-08-27 16:00:00	Deleted screen testDETAILScreenExampleDocCat
Event handlers	ARCO\FERDY	Arco.ApplicationServer.Service	INSERT	134292	SCREEN	2012-08-27 15:58:00	Inserted screen testINSERTUPDETEDETAILExampleDocCat
Notes	ARCO\FERDY	Arco.ApplicationServer.Service	INSERT	134284	SCREEN	2012-08-27 15:56:00	Inserted screen testRESULTScreenExampleDocCat
Audit	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134284	SCREEN	2012-08-27 15:56:00	Updated screen testRESULTScreenExampleDocCat
	ARCO\FERDY	Arco.ApplicationServer.Service	INSERT	134289	SCREEN	2012-08-27 15:56:00	Inserted screen testTOOTIPScreenExampleDocCat
	ARCO\FERDY	Arco.ApplicationServer.Service	INSERT	134277	SCREEN	2012-08-27 15:52:00	Inserted screen t
	ARCO\FERDY	Arco.ApplicationServer.Service	UPDATE	134277	SCREEN	2012-08-27 15:52:00	Updated screen t
	ARCO\FERDY	DomaAdmin	DELETE	134277	SCREEN	2012-08-27 15:52:00	Deleted screen t
	ARCO\FERDY	Arco.ApplicationServer.Service	INSERT	134270	SCREEN	2012-08-27 15:50:00	Inserted screen testRESULTSCREENExampleDocCat

3 Document category

3.1 Category Tab

This tab contains the main configuration items of the document category. It appears initially together with the tab *Translation*. After save, other tabs will appear.

The screenshot shows the 'Category' configuration window for 'ExampleDocCategory'. The left sidebar contains a tree view with options: Category (selected), Translation, Properties, Parameters, Edit-checks, Packages, Document templates, Screens, Event actions, User events, Event handlers, Notes, and Audit. The main area is divided into several sections:

- Category:**
 - ID: 131135
 - Name: ExampleDocCategory
 - Icon: Document-icon.png
 - Type: Document
 - Create documents in folder: (empty text field)
 - Auto name: RequiredName
 - Input package: (dropdown menu)
 - ☐ Disable manual creation
- File:**
 - File cardinality: NoConstraint
 - ☐ Disable global file extensions
 - Default file server: Default File Server
 - Default rendition server: Default Rendition Server
- List info:** (empty text field)
- Category type handler:**
 - Handler: (dropdown menu)
- Actions:**
 - Add: Default
 - Delete: Default
 - Check-out: Default

Definition of specific fields for the document category:

Field name	Information
Create documents in folder	Enter the folder name where documents of this document category will be created. When blank, a new document of this document category will be created in the active folder in the web interface
Input package	<p>Select the package that will be used as input package. The package must first be defined in the Packages tab of the category.</p> <p>The input package is a DocRoom package that can be used in order to create a DocRoom category instance starting from a set of DocRoom objects (Document, Folder, Workflow, Dossier)</p> <p>In order to do this, the user has to select a set of DocRoom objects (in the Web interface), and create a new object having an input package defined. The new object will then be created with the selected DocRoom objects as content of the package defined here as input package.</p>

File

Field name	Information
File cardinality	Not allowed: no files can be added to a document ExactOne: exactly one file is mandatory No Constraint (default): 0 or more files can be added AtLeastOne: At least 1 file must be added MaxOne: 0 or 1 files can be added
Disable global file extensions	<input checked="" type="checkbox"/> Files with extensions defined as global (file extensions not linked to this document category) cannot be added to a document instance of this document category. Only files with an extension specifically linked to this Document category can be added <input type="checkbox"/> All global file extensions are allowed
Default file server	Select the file server for this document category.
Default Rendition server	Select the rendition server for this document category

Actions

Field name	Information
Add	Default: no workflow procedure will be used. NA: Not Available: no document of this document category can be added anymore A workflow procedure for creation of documents of this document category can be selected here. All documents of this document category will then be created as implemented in the procedure.
Delete	Default: no workflow procedure will be used NA: Not Available: no document of this document category can be deleted anymore A workflow procedure for deletion of documents of this document category can be selected here. All documents of this document category will then be deleted as implemented in the procedure.
Check out	Default: no workflow procedure will be used NA: Not Available: no document of this document category can be checked out anymore A workflow procedure for checking out documents of this document category can be selected here. All documents will then be checked out as implemented in the procedure.

3.2 Translation Tab

See general description above.

3.3 Properties Tab

See general description above.

3.4 Parameters Tab

See general description above.

3.5 Edit Checks Tab

See general description above.

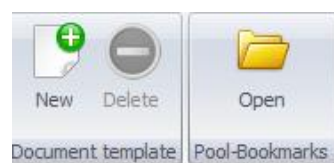
3.6 Packages Tab

See general description above.

3.7 Document Templates Tab

This tab shows an overview of all document templates that are linked to (used in) the category.

Using the toolbar, the user can



- Create new document templates
- Delete a document template
- Open pool bookmarks

3.8 Screens Tab

See general description above.

3.9 Event actions Tab

See general description above.

3.10 User Events Tab

See general description above.

3.11 Event Handlers Tab

See general description above.

3.12 Notes Tab

See general description above.

3.13 Audit Tab

See general description above.

4 Folder category

4.1 Category Tab

This tab contains the main configuration items of the folder category. It appears initially together with the tab *Translation*. After save, other tabs will appear.

After installation, a default folder category 'Folder' exists.

Definition of specific fields for the folder category:

Field name	Information
Input package	<p>Select the package that will be used as input package. The package must first be defined in the Packages tab of the category.</p> <p>The input package is a DocRoom package that can be used in order to create a DocRoom category instance starting from a set of DocRoom objects (Document, Folder, Workflow, Dossier)</p> <p>In order to do this, the user has to select a set of DocRoom objects (in the Web interface), and create a new object having an input package defined. The new object will then be created with the selected DocRoom objects as content of the package defined here as input package.</p>

Defaults

Field name	Information
Search screen	<p>0-None: no specific search screen is defined for the folder category.</p> <p>Select the search screen to be used for queries on this folder. The search screen has to be defined as a query screen .</p> <p>When activating a search on a folder of this category, this screen will be used</p>
Result screen	<p>0-None: no specific result screen is defined on the folder</p> <p>Select the result screen to be used for query results on this folder.</p>
Tree action	<p>Action triggered when clicking on the folder in the DocRoom tree in the WebInterface</p> <p><i>Empty</i> : default – opens the conten in the right panel AddCommand: opens the Add object screen BrowseCommand: browses the folder in right panel BrowseWithSubFolders: browses the folder in right panel and shows also the data from the subfolders EditCommand: Opens with a Edit screen to edit folder data EditInLine: Opens with a Edit In line screen ExploreCommand: Starts new screen to explore the folder InfoCommand: Shows the info screen NoAction: No action will be done OpenCommand: Opens the folder in a new screen Openinline: Opens the property data in the right panel SearchCommand: opens the search screen</p>
Explore site	<p>When opening a folder of this category using the explore command, DocRoom will use the screen defined in this site of the DocRoom configuration (in [ROOT]\data\sites</p>

Actions

Field name	Information
Add	<p>Default: no workflow procedure will be used.</p> <p>NA: Not available, folders of this category cannot be added</p> <p>A workflow procedure for creation of folders of this folder category can be selected here. All folders of this folder category will then be created as implemented in the procedure.</p>
Delete	<p>Default: no workflow procedure will be used</p> <p>NA: Not available, folders of this category cannot be deleted</p>

A workflow procedure for deletion of folders of this folder category can be selected here. All folders of this folder category will then be deleted as implemented in the procedure.

4.2 Translation Tab

See general description above.

4.3 Properties Tab

See general description above.

4.4 Parameters Tab

See general description above.

4.5 Edit Checks Tab

See general description above.

4.6 Packages Tab

See general description above.

4.7 Screens Tab

See general description above.

4.8 Event actions Tab

See general description above.

4.9 User Events Tab

See general description above.

4.10 Event Handlers Tab

See general description above.

4.11 Child categories Tab

In this screen the user can define the DocRoom categories that are allowed as child category for this folder category.

The following child categories can be configured:

- Folder child categories
- Document child categories
- Workflow child categories

- Dossier child categories

The screenshot shows the Arco application interface with a sidebar on the left containing various menu items like Category, Translation, Properties, Parameters, Edit-checks, Packages, Screens, Event actions, User events, Event handlers, Child categories, Notes, and Audit. The main area contains four panels, each with a title and three radio buttons: 'None', 'All' (selected), and 'Custom'. The panels are: 'Child folder categories', 'Child document categories', 'Child workflow categories', and 'Child dossier categories'.

For each child category, the following options are possible:

A close-up of the category selection interface showing three radio buttons: 'None', 'All' (which is selected and highlighted with a blue dot), and 'Custom'.

Field name	Information
None	No childs are allowed for this type of child category
All	All childs are allowed for this type of child category
Custom	Only the further selected categories are allowed for this type of child category

In order to select the specific categories, click on 'Custom' and the possible categories will be shown.

The screenshot shows the 'Child document categories' panel with the 'Custom' radio button selected. It displays two columns: 'Available categories' on the left and 'Selected categories' on the right. The 'Available categories' list includes 'NAME', 'Document', 'ExampleDocCategory', 'General Document', and 'PersonFiche'. The 'Selected categories' list is currently empty.

You can select the categories either by double clicking on the category name in the left column, either selecting the category in the left column and by dragging it to the right column.

This screenshot shows the same 'Child document categories' panel as before, but now the 'Document' category has been moved from the 'Available categories' list to the 'Selected categories' list. The 'Available categories' list now only contains 'NAME', 'ExampleDocCategory', 'General Document', and 'PersonFiche'.

4.12 Notes Tab

See general description above.

4.13 Audit Tab

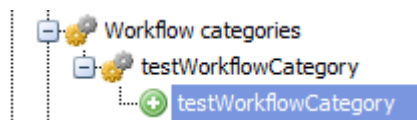
See general description above.

5 Workflow category

5.1 The linked Workflow procedure

When creating a workflow category, automatically a routing workflow procedure (initially with the same name) will be created. This procedure is visible in the tree of the DomaAdmin module.

When editing this procedure (double click on the procedure item, or clicking 'edit' using the right mouse menu), the same functionality for the definition of the procedure (and its steps, events, ..) are available as for the standard Workflow procedure.



Remark:

Please see the manual [Doma 6 - Application Administrator Manual - 05 – Routing procedures and workflow categories](#) for more information about the procedures and how to define them.

5.2 Category Tab

This tab contains the main configuration items of the workflow category. It appears initially together with the tab *Translation*. After save, other tabs will appear.

Definition of specific fields for the folder category:

Field name	Information
Create workflows in folder	Enter the folder name where workflows of this workflow category will be created. When blank, a new workflow instance of this workflow category will be created in the active folder in the web interface

Input package

Select the package that will be used as input package. The package must first be defined in the Packages tab of the category.

The input package is a DocRoom package that can be used in order to create a DocRoom category instance starting from a set of DocRoom objects (Document, Folder, Workflow, Dossier)

In order to do this, the user has to select a set of DocRoom objects (in the Web interface), and create a new object having an input package defined. The new object will then be created with the selected DocRoom objects as content of the package defined here as input package.

File

Field name	Information
File cardinality	Not allowed: no files can be added to a workflow ExactOne: exactly one file is mandatory No Constraint (default): 0 or more files can be added AtLeastOne: At least 1 file must be added MaxOne: 0 or 1 files can be added
Disable global file extensions	<input checked="" type="checkbox"/> Files with extensions defined as global (file extensions not linked to this workflow category) cannot be added to a workflow instance of this workflow category. Only files with an extension specifically linked to this workflow category can be added <input type="checkbox"/> All global file extensions are allowed
Default file server	Select the file server for this workflow category.
Default Rendition server	Select the rendition server for this workflow category

5.3 Translation Tab

See general description above.

5.4 Properties Tab

See general description above.

5.5 Parameters Tab

See general description above.

5.6 Edit Checks Tab

See general description above.

5.7 Packages Tab

See general description above.

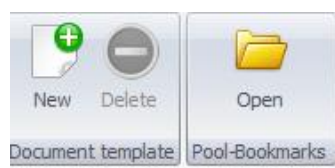
5.8 Document Templates Tab

This tab shows an overview of all document templates that are linked to (used in) the workflow category.

The screenshot shows the 'Document template' configuration window. At the top is a toolbar with icons for Save, Save & Close, New, Delete, Open, and Close. Below the toolbar, the window is divided into two main sections. The left section contains a 'Translation' tab. The right section is titled 'Document template' and contains the following fields and options:

- ID:** A text input field containing the value '0'.
- Template type:** A dropdown menu with 'Csv - comma delimited (*.csv)' selected.
- Output type:** A dropdown menu with 'CSV (*.csv)' selected.
- Document category:** A dropdown menu with 'ExampleDocCategory' selected.
- Parent folder category:** A dropdown menu.
- Procedure:** A dropdown menu.
- Allowed at:** A section containing three checkboxes: 'New document' (checked), 'Add document file' (checked), and 'Procedure' (unchecked).
- Code:** A text input field.
- Template file:** A text input field with a browse button (three dots) to its right.
- Auto edit file:** An unchecked checkbox.
- Include logo:** An unchecked checkbox.
- Redirect URL:** A text input field.
- Copy template URL to clipboard:** A button.

Using the toolbar, the user can



- Create, modify new document templates
- Delete a document template
- Open pool bookmarks

5.9 Screens Tab

See general description above.

5.10 Event actions Tab

See general description above.

5.11 User Events Tab

See general description above.

5.12 Event Handlers Tab

See general description above.

5.13 Notes Tab

See general description above.

5.14 Audit Tab

See general description above.

6 Dossier category

6.1 Category Tab

This tab contains the main configuration items of the dossier category. It appears initially together with the tab *Translation*. After save, other tabs will appear.

Dossier categories handle the concept of a dossier within DocRoom.

Definition of specific fields for the folder category:

Field name	Information
Input package	<p>Select the package that will be used as input package. The package must first be defined in the Packages tab of the category.</p> <p>The input package is a DocRoom package that can be used in order to create a DocRoom category instance starting from a set of DocRoom objects (Document, Folder, Workflow, Dossier)</p> <p>In order to do this, the user has to select a set of DocRoom objects (in the Web interface), and create a new object having an input package defined. The new object will then be created with the selected DocRoom objects as content of the package defined here as input package.</p>

Defaults

Field name	Information
Search screen	<p>0-None: no specific search screen is defined on the dossier category.</p> <p>Select the search screen to be used for queries on this the dossier category</p>
Result screen	<p>0-None: no specific result screen is defined on the the dossier category.</p> <p>Select the result screen to be used for query results on this the dossier category.</p>
Tree action	<p><i>Empty</i> : default – opens the content in the right panel</p> <p>AddCommand: opens the Add object screen</p> <p>BrowseCommand: browses the dossier in right panel</p> <p>BrowseWithSubFolders: browses the dossier in right panel and shows also the data from the subfolders</p> <p>EditCommand: Opens with a Edit screen to edit dossier data</p> <p>EditInLine: Opens with a Edit In line screen (right panel)</p> <p>ExploreCommand: Starts new screen to explore the dossier</p> <p>InfoCommand: Shows the info screen</p> <p>NoAction: No action will be done</p> <p>OpenCommand: Opens the dossier in a new screen</p> <p>Openinline: Opens the property data in the right panel</p> <p>SearchCommand: opens the search screen</p>
Explore site	<p>When opening a dossier of this category using the explore command, DocRoom will use the screen defined in this site of the DocRoom configuration (in [ROOT]\data\sites</p>

Actions

Field name	Information
Add	<p>Default: no workflow procedure will be used.</p> <p>NA: Not available: dossiers of this category cannot be added</p> <p>A workflow procedure for creation of dossiers of this the dossier category can be selected here. All dossiers of this dossier category will then be created as implemented in the procedure.</p>
Delete	<p>Default: no workflow procedure will be used</p> <p>NA: Not available: dossiers of this category cannot be deleted</p> <p>A workflow procedure for deletion of dossiers of this the dossier category can be selected here. All dossiers of this dossier category will then be deleted as implemented in the procedure.</p>

6.2 Translation Tab

See general description above.

6.3 Properties Tab

See general description above.

6.4 Parameters Tab

See general description above.

6.5 Edit Checks Tab

See general description above.

6.6 Packages Tab

See general description above.

6.7 Screens Tab

See general description above.

6.8 Event actions Tab

See general description above.

6.9 User Events Tab

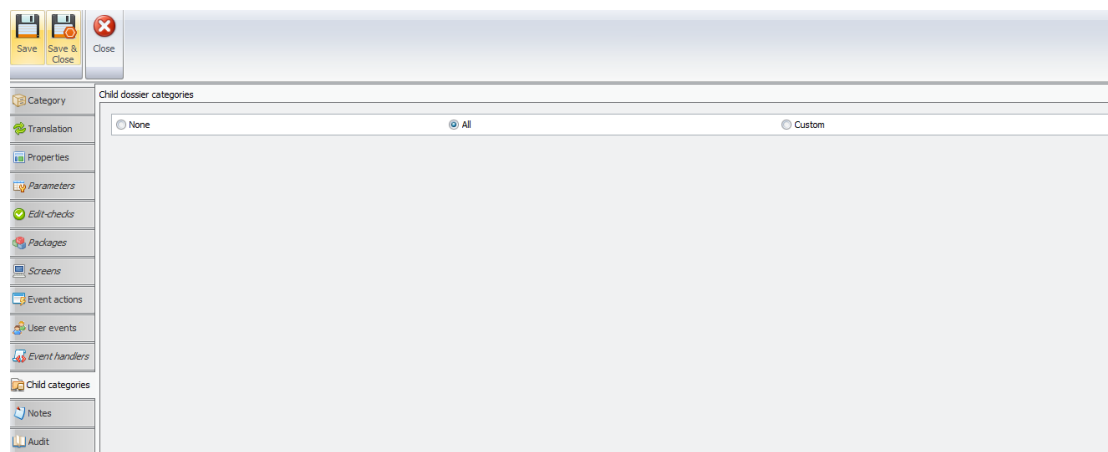
See general description above.

6.10 Event Handlers Tab

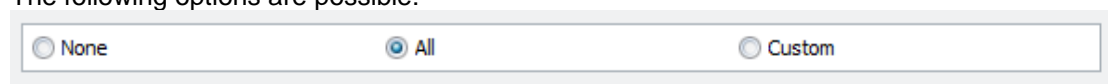
See general description above.

6.11 Child categories Tab

In this screen the user can define the DocRoom dossiers categories that are allowed as child category for this dossier category.

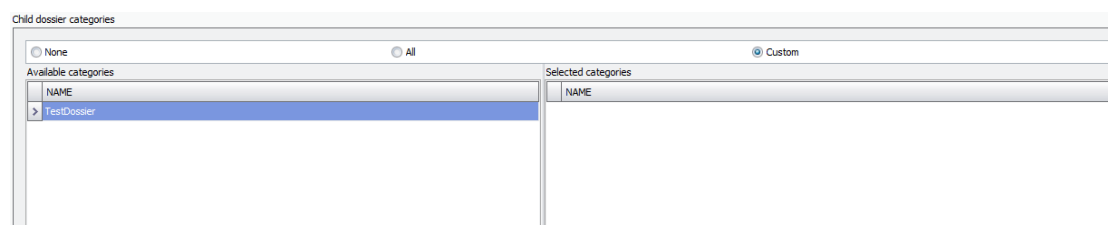


The following options are possible:

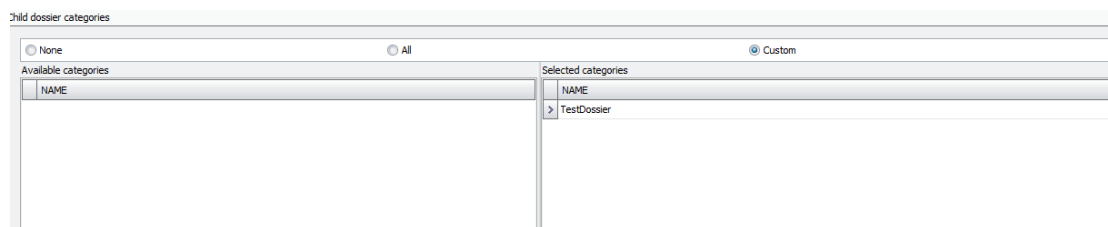


Field name	Information
None	No dossiers are allowed as child for this category
All	All dossiers are allowed as child for this category
Custom	Only the further selected dossier categories are allowed as child for this category

In order to select the specific categories, click on 'Custom' and the possible categories will be shown.



You can select the categories either by double clicking on the category name in the left column, either selecting the category in the left column and by dragging it to the right column.



6.12 Notes Tab

See general description above.

6.13 Audit Tab

See general description above.

7 Procedure category

Remark:

Please see the manual *Doma 6 - Application Administrator Manual - 05 – Routing procedures and workflow categories* for more information about the procedures and how to define them.