


Table of Contents

1. Login.....	1
1.1 Login on.....	1
1.2 Login out.....	1
2. Document types.....	2
2.1 Creating document types.....	2
2.2 Viewing document types.....	3
2.3 Document type examples.....	3
3. Document metadata.....	4
3.1 Creating metadata types.....	4
3.2 Assigning a metadata type to a document type.....	5
3.3 Metadata type examples.....	6
4. Document Upload.....	7
4.1 Step-by-step guide.....	7
5. Finding documents.....	10
5.1 Viewing all documents.....	10
5.2 Viewing the most recent documents.....	10
5.3 Viewing the most recent accessed documents.....	11
5.4 Document search wizard.....	11
6. Administrator.....	13
6.1 Creating user accounts.....	13
6.2 Creating user groups.....	15
6.3 Creating a role.....	16
6.4 Give permissions to a group of users.....	17
6.4.1 Adding users to groups.....	17
6.4.2 Adding groups to a role.....	18
6.5 Restrict document viewing based on document type.....	18

1. Login

1.1 Login on

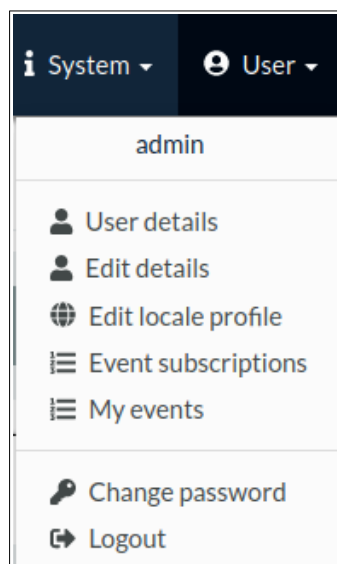
Url?



A sign-in form with a dark blue header bar containing the text "Sign in". Below the header, there are two input fields: "Username: (required)" and "Password: (required)". Below the password field is a checkbox labeled "Remember me". A dark blue button with a right-pointing arrow and the text "Sign in" is located below the checkbox. At the bottom right of the form, there is a link that says "Forgot your password?" in green text.

1.2 Login out

1. Go to **User** on the top right of home page.
2. Click **Logout**.



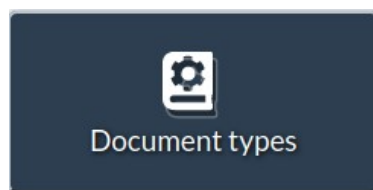
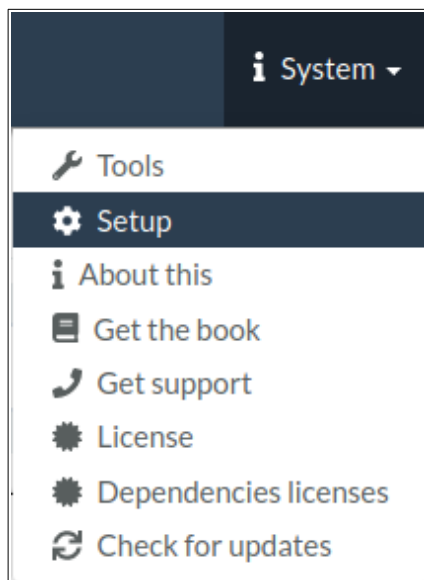
2. Document types

- Document type are the most basic level of classification.
- Every document needs to be assigned to a document type.
- Documents can only be of one document type.
- The type of the document is chosen during upload but can also be changed afterwards.

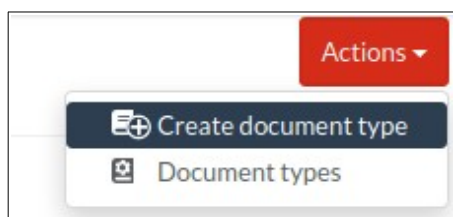
2.1 Creating document types

► The “Create document types” permission is required for this action.

1. Go to the *System* → *Setup* → *Document types*.



2. From the *Actions* drop-down select *Create document type*.



3. Enter a label.

2.2 Viewing document types

Roles with permission “View document types” can view a list of types.

To restrict permission of viewing documents based on document types, see ► [6.5 Restrict document viewing based on document type](#)

2.3 Document type examples

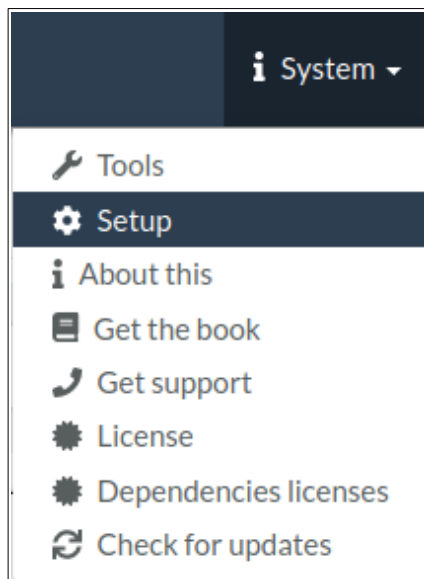
- Contract
- Insurance
- Invoice
- Meeting Minutes
- Receipt

3. Document metadata

- Metadata are custom properties. They extend the amount of information about a document.
- Metadata types are first created and associated to a document type before they can be used with documents.
- Metadata can be defined as optional or required.

3.1 Creating metadata types

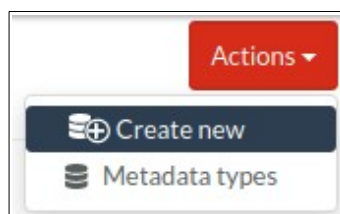
► The “Create new metadata types” permission is required for this action.



1. Go to the **System** → **Setup** → **Metadata types**.



2. From the **Actions** drop-down select **Create new**.



3. Fill in **Name** and give a short description as **Label**

Name: (required)

color

Name used by other apps to reference this metadata type. Do not use python reserved words, or spaces.

Label: (required)

color of the document

Short description of this metadata type.

4. Optional:

Default: Enter a default value for the metadata type.

Lookup: Provide a comma separated list of options to restrict the data entry when using this metadata type.

Default:

White

Enter a template to render. Use Django's default templating language (<https://docs.djangoproject.com/en/1.11/ref/templates/builtins/>)

Lookup:

Black, Red, Blue, Green

5. **Save** the metadata type.

3.2 Assigning a metadata type to a document type

1. Go to the *System* → *Setup* → *Metadata types* menu.
2. Click on the button *Document types* of the metadata type you wish to associate.

Label?	Name?
color of the document	color
ACLs	Document types
Events	Subscriptions
Delete	Edit

3. From the list of existing document types press either:

None	Optional	Required
------	----------	----------

- **None** - if this metadata type will not be available for the type of documents.
- **Optional** - if this metadata type will be available and is optional to provide a value for the type of documents.
- **Required** - if this metadata type will be available and is required to provide a value for the type of documents.

4. Press **Submit** to save.

3.3 Metadata type examples

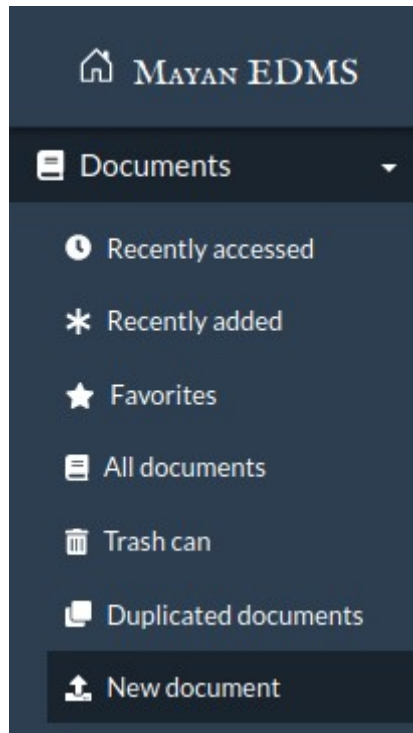
- Invoice number
- Colour
- Employee id
- Department

4. Document Upload

► The “Create documents” permission is required for this action.

4.1 Step-by-step guide

1. Locating **Documents** drop-down in the left navigation bar and click **New document**



2. Following the document upload wizard

3. The first step is **required**. Select a **document type** for the document that will be uploaded.

A screenshot of a web form for document upload. The form has a light gray background. At the top, it says 'Document type: (required)' in a dark blue font. Below this is a white dropdown menu with a dark blue arrow pointing down. At the bottom of the form is a dark blue button with a white right-pointing arrow and the text 'Next step' in white.

4. If there are **metadata types** associated with the selected document type, this next step will show a form allowing data entry for each metadata type for the new document. If there are required metadata types, a value must be entered before the wizard will allow progressing further. Click the **Next step** to continue.

Name:	Value:	Update:
Department	<input type="text"/>	<input type="checkbox"/>
employee id	<input type="text"/>	<input type="checkbox"/>

[→ Next step](#)

5. If **tags** have been created, this next step will show a form allowing the selection of multiple tags to attach to the new document. Click the button **Next step** to continue.

Tags:

Tags to be attached.

[→ Next step](#)

6. If **cabinets** have been created, this next step will show a form allowing the selection of multiple cabinets to which the new document will be added. Click the button **Next step** to continue.

Cabinets:

Cabinets to which the document will be added.

[→ Next step](#)

7. The upload form will be shown. Upload file by dragging and dropping or selected from file browser window.


Language:

English ▼

The dominant language in the document.


☐ Expand compressed files

Upload a compressed file's contained files as individual documents.

 Drop files or click here to upload files

If there are pre-defined sources list on the right, choose a appropriate source when uploading.

Choose a source:

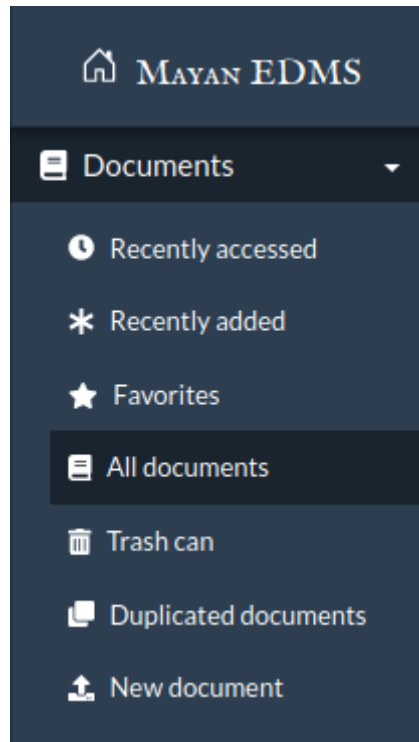
 local folder

 test Source

5. Finding documents

► The “View documents” permission is required for this action, globally or via ACL for the document or document type.

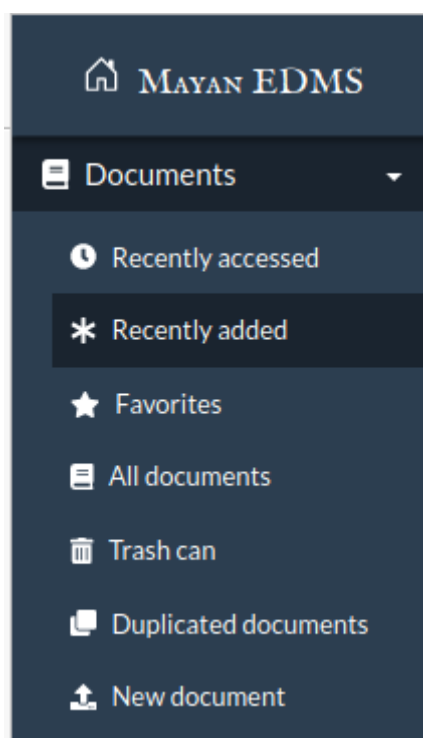
5.1 Viewing all documents



1. Go to the left navigation bar. Click ***Documents*** → ***All documents***
2. A list of all the documents will be shown.

5.2 Viewing the most recent documents

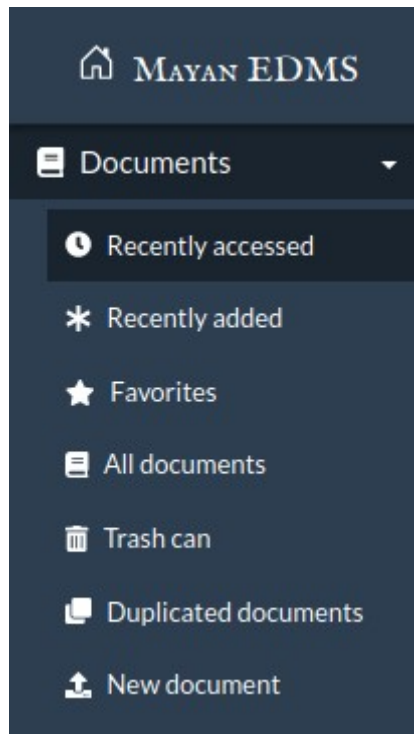
1. Go to the left navigation bar. Click ***Documents*** → ***Recently added***



2. A list of the most recently created documents will be shown.

5.3 Viewing the most recent accessed documents

1. Go to the left navigation bar. Click **Documents** → **Recently accessed**



2. A list of the most recently accessed documents will be shown.

5.4 Document search wizard

1. Click **Search** button on home page. The document search wizard will start.



2. A document type is required for the first search step. Select a document type from drop-down list. Click **Next** to continue.

Document search wizard

Step 1 of 3

Document type:

→ Next

3. Select a metadata type from drop-down list.

- Leave it blank if you want to see all the document for the selected document type.
- Click **Next** to continue.
- Click **First step** or **Previous** to go back to the document type chosen page.

The screenshot shows a web form titled "Step 2 of 3". Below the title is a light gray box containing the text "Metadata type (optional):" followed by an empty white input field. At the bottom of the form are three buttons: "First step" (dark blue with a left arrow), "Previous" (dark blue with a left arrow), and "Next" (teal with a right arrow).

4. Select a value of associated metadata type.

- If there is no results found in the drop-down list, click **Next** to view the result list.
- Leave it blank if you want to see all the document with selected metadata type.
- Click **First step** to go back to the document type chosen page.
- Click **Previous** to go back to the metadata type chosen page.

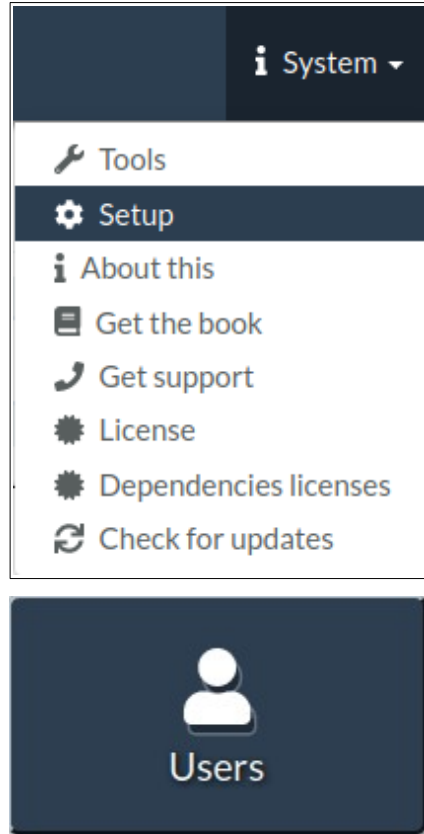
The screenshot shows a web form titled "Step 3 of 3". Below the title is a light gray box containing the text "Value of metadata (optional):" followed by an empty white input field. At the bottom of the form are three buttons: "First step" (dark blue with a left arrow), "Previous" (dark blue with a left arrow), and "Next" (teal with a right arrow).

5. A list of results will be shown.

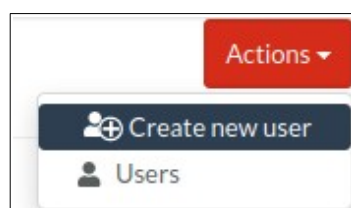
6. Administrator

Basic guide for login as administrator.

6.1 Creating user accounts



1. Go to the **System** → **Setup** → **Users** menu.
2. From the Actions drop-down select **Create new user**.



3. Provide a **Username** to identify the user. Usernames must be unique for entire system.

Create new user

Username: (required)

Required. 150 characters or fewer. Letters, digits and @./+/_ only.

First name:

Last name:

Email address:

☒ **Active**

Designates whether this user should be treated as active. Unselect this instead of deleting accounts.

4. Optional: Enter the first name and last of the user.
5. Optional: Enter the e-mail of the user.
6. Click the **Active** checkbox to mark the user as active or inactive. This checkbox will be selected by default. (Inactive users are not able to login and use the system.)
7. Press **Save**.
8. The user account will be created and you will be redirected to the password change view for the user account.

New password: (required)

- Your password can't be too similar to your other personal information.
- Your password must contain at least 8 characters.
- Your password can't be a commonly used password.
- Your password can't be entirely numeric.

New password confirmation: (required)

✓ Submit

✕ Cancel

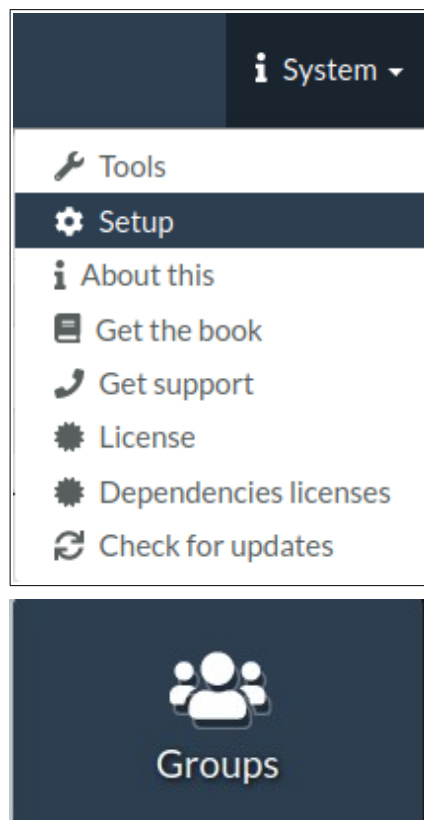
Provide a password for initial access according to your organisation's password security policies. The password will be verified by the password validators that are enabled at the moment. The password will not be visible during data entry.

9. Enter the password in the two fields of the form.

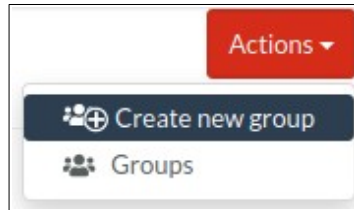
10. Press **Submit**.

6.2 Creating user groups

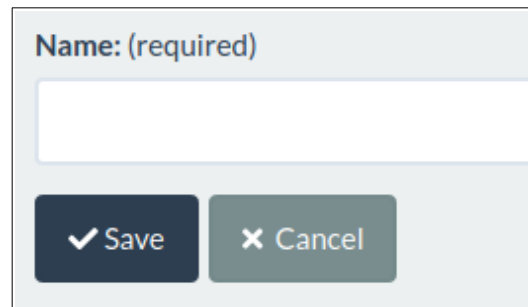
1. Go to the **System** → **Setup** → **Groups** menu.



2. From the **Actions** drop-down select **Create new group**.



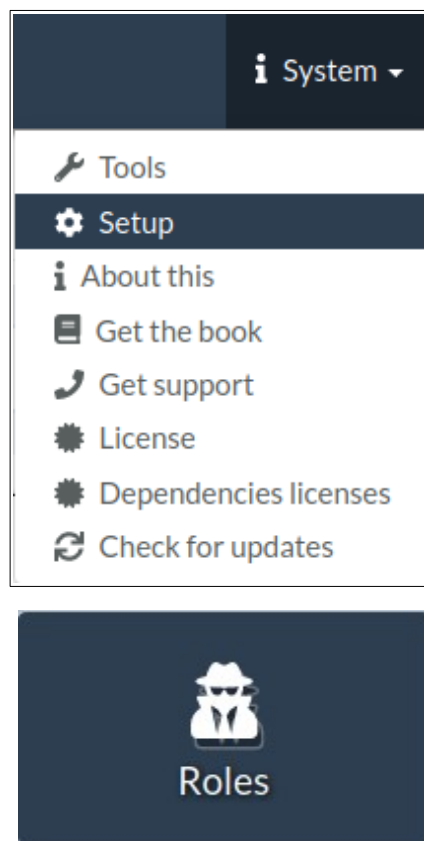
3. Provide a **name** to identify the group.

A screenshot of a form for creating a group. It features a text input field labeled 'Name: (required)'. Below the field are two buttons: a dark blue 'Save' button with a checkmark icon and a light gray 'Cancel' button with an 'X' icon.

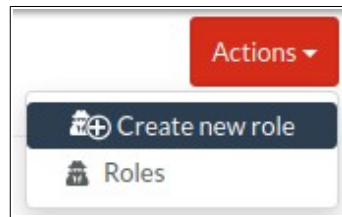
4. Press **Save**.

6.3 Creating a role

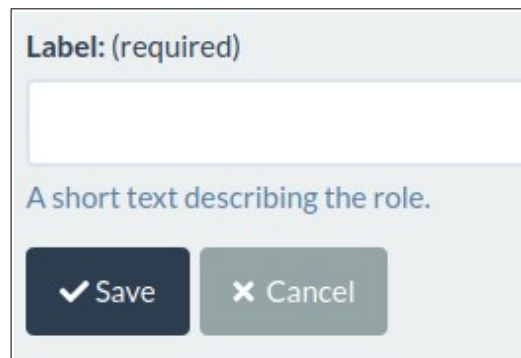
1. Go to the **System** → **Setup** → **Roles** menu.



2. From the **Actions** drop-down select **Create new role**.

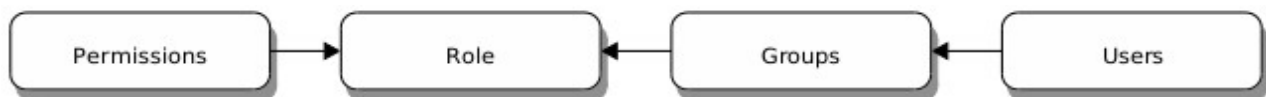


3. Enter a label to identify the role.

A screenshot of a form for creating a new role. It features a text input field labeled 'Label: (required)'. Below the field is a hint text: 'A short text describing the role.' At the bottom of the form are two buttons: a dark blue 'Save' button with a checkmark icon and a light gray 'Cancel' button with an 'X' icon.

4. Press **Save**.

6.4 Give permissions to a group of users



- Permissions are granted to the role. Users are added to groups which are added to the role.
- Granting a permission directly to a role, grants it for the entire system and all objects.

6.4.1 Adding users to groups

Two ways to achieve that:

1. Go to the **System** → **Setup** → **Users** menu.
2. Select a username and click **Groups**.
3. From Available groups list, choose one or more groups.
4. **Double click** or click **Add** button to add user to that groups.

OR

1. Go to the **System** → **Setup** → **Groups** menu.
2. Select one of existing groups, click **Users**.

3. From Available users list, choose one or more users that you want to add.
4. **Double click** or click **Add** button to add users to that group.

6.4.2 Adding groups to a role

Two ways to achieve that:

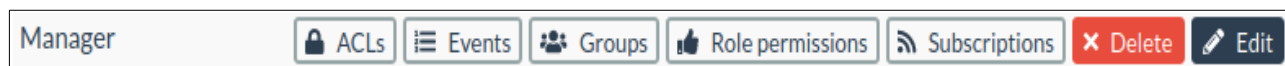
1. Go to the **System** → **Setup** → **Groups** menu.
2. Select one of existing groups, click **Roles**.
3. From Available roles list, choose one or more roles.
4. **Double click** or click **Add** button to add roles that groups belong to.

OR

1. Go to the **System** → **Setup** → **Roles** menu.
2. Select a role label and click **Groups**.
3. From Available groups list, choose one or more groups.
4. **Double click** or click **Add** button to add groups in a role.

Grant permissions of a role

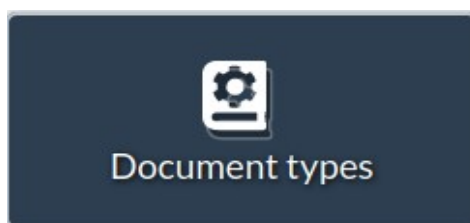
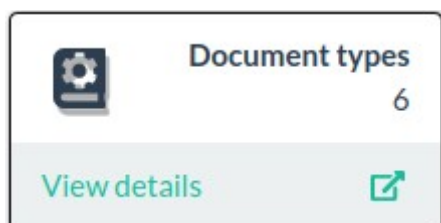
1. Go to **System** → **Setup** → **Roles**. Click **Role permissions** allow you grant permissions to a role.



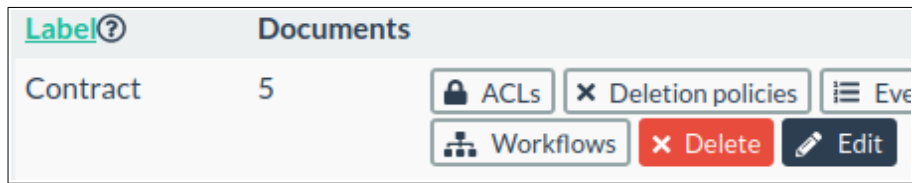
2. Select permissions from the left Available permissions list then **double click** or click **Add** button to grant it for the entire system and all objects.
3. Select permissions from the right Granted permissions list then **double click** or click **Remove** button to remove permissions.

6.5 Restrict document viewing based on document type

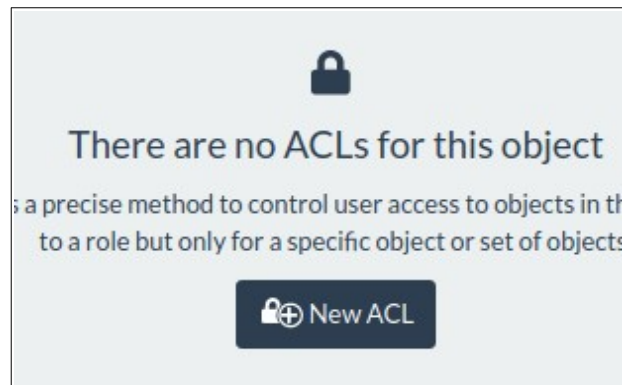
1. Click Document types: **View details** or go to the **System** → **Setup** → **Document types**.



2. Click **ACLs** of one document type

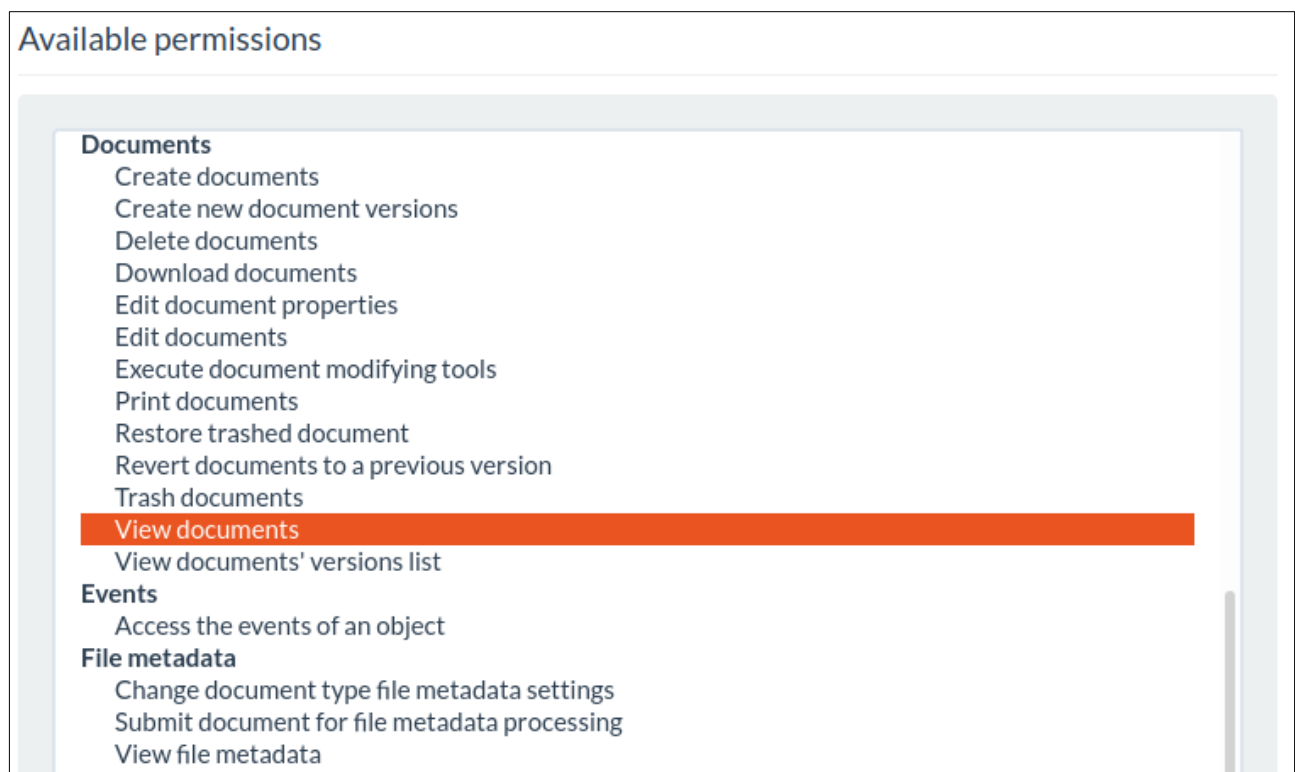


3. Create a new access control list via **New ACL**



4. Select a role that you want to give him a permission to view the document. Click **Save**.

5. Locating **Document** → **View documents** in Available permissions list, **double click** or click **Add** button to grant permission.



6. Now the role can only view documents which type is “contract” for examples.