Table of Contents

1. Login(TODO)

1.1 Login on
? url

1.2 Login out

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

2. Click *Logout.*
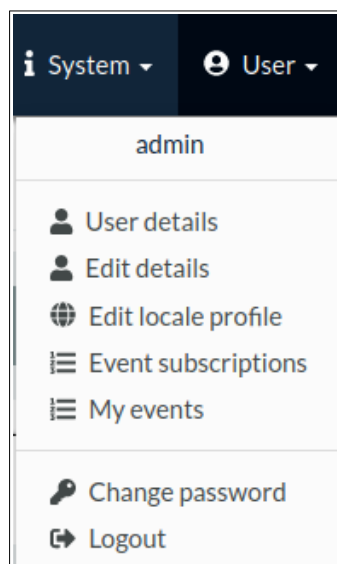
2. Document types

- 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.*
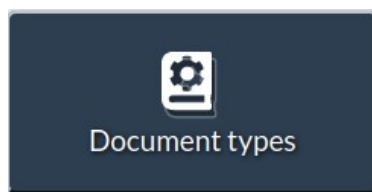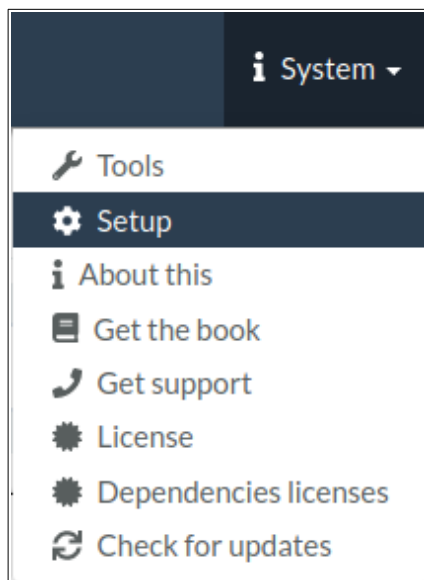
2. From the *Actions* dropdown select *Create document type.*
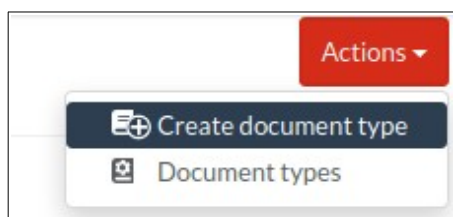
3. Enter a label.

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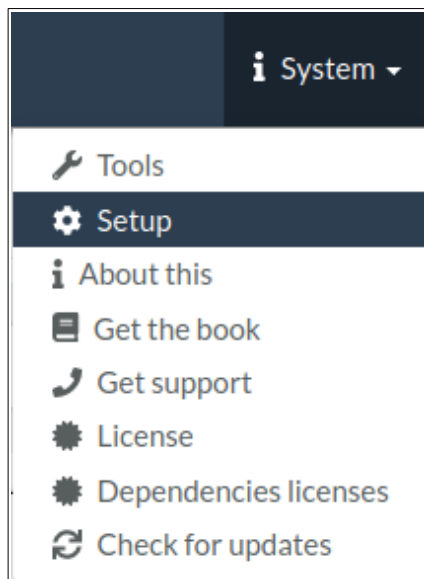
1. Go to the *System → Setup → Metadata types.*

2. From the *Actions* dropdown select *Create new.*

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

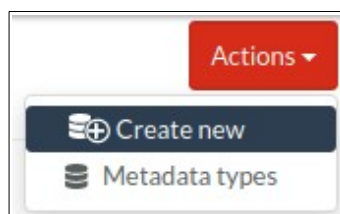4. Optional:

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.

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 ⑦	Name ⑦	
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.
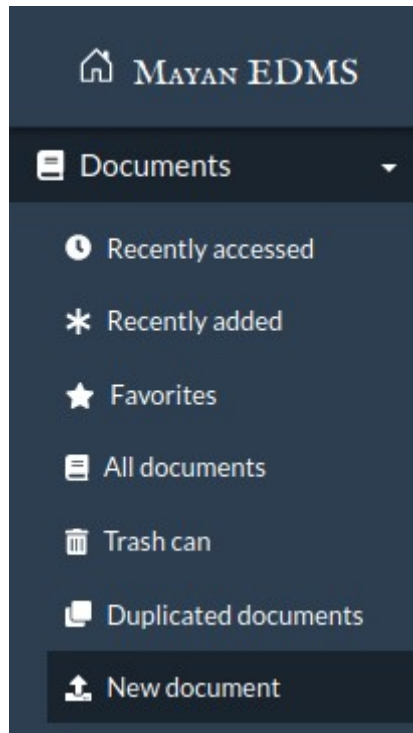
3.3 Metadata type examples

- 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* dropdown 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.

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.

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.

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.

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

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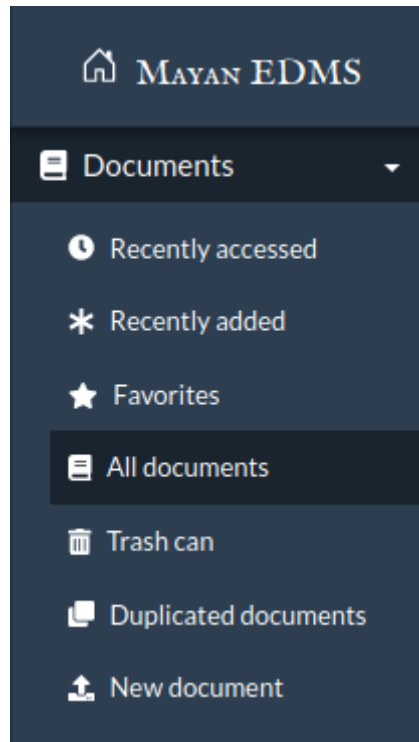
5. Finding documents

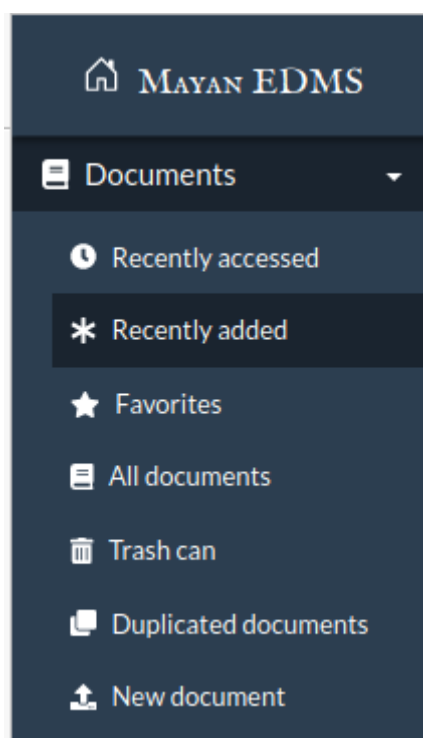► The "View documents" permission is required for this action, globally or via ACL for the document or document type.

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

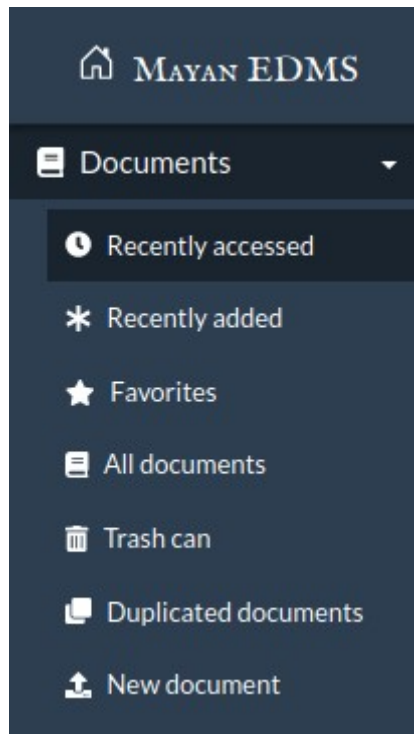1. Go to the left navigation bar. Click *Documents → Recently added*

2. A list of the most recently created documents will be shown.
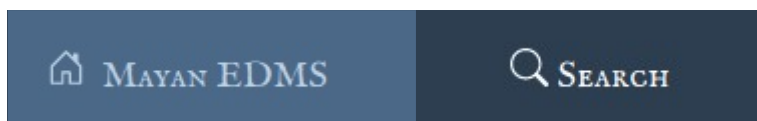
5.3 Viewing the most recent accessed documents

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 dropdown list. Click *Next* to continue.

3. Select a metadata type from dropdown 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.

Step 2 of 3

Metadata type (optional):

◄ First step   ← Previous   → Next

4. Select a value of associated metadata type.

- If there is no results found in the dropdown 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.
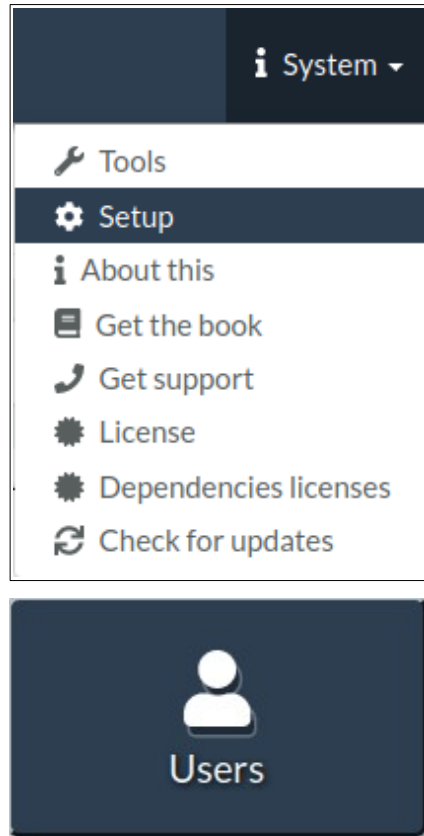- Click *Previous* to go back to the metadata type chosen page.

Step 3 of 3

Value of metadata (optional):

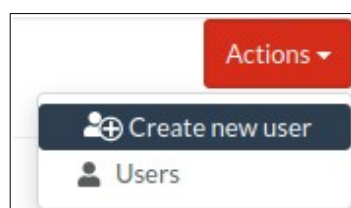◄ First step   ← Previous   → Next

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 dropdown 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.

[✔ Save] [✖ Cancel]

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.

Provide a password for initial access according to your organization'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.

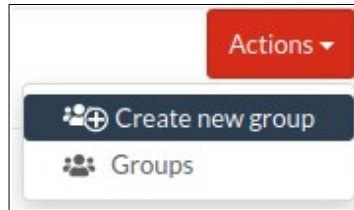9. Enter the password in the two fields of the form.
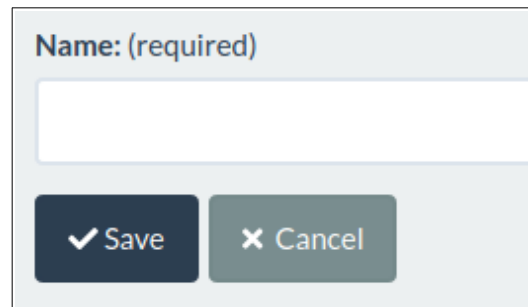
10. Press **Submit**.

6.2 Creating user groups

1. Go to the *System → Setup → Groups* menu.
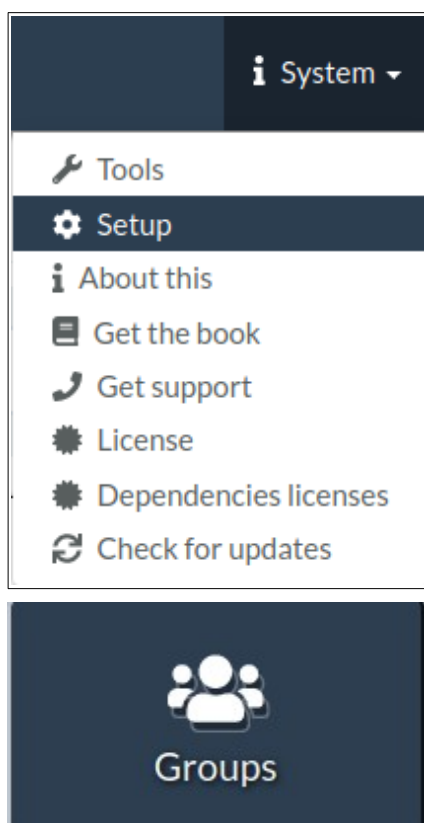
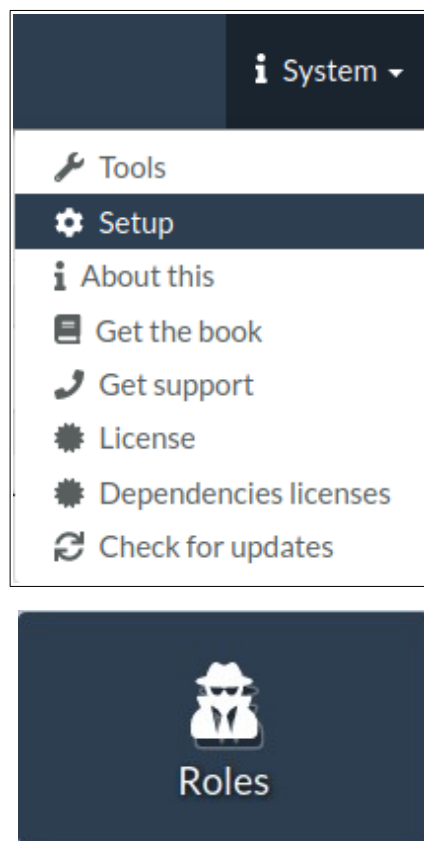2. From the **Actions** dropdown select **Create new group**.

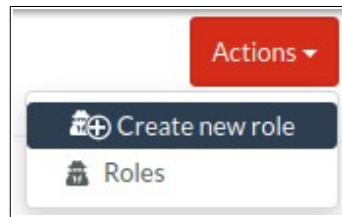3. Provide a **name** to identify the group.
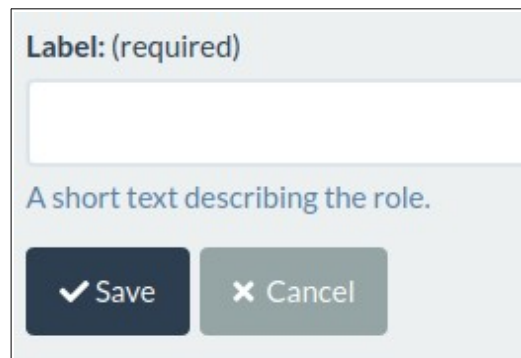

4. Press **Save**.

6.3 Creating a role

1. Go to the **System** → **Setup** → **Roles** menu.
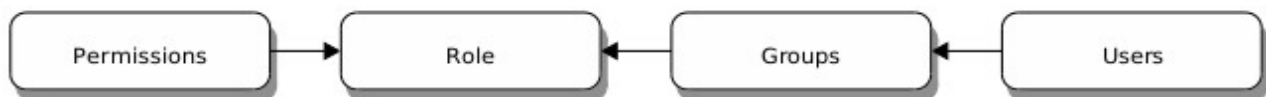
2. From the *Actions* dropdown select *Create new role*.

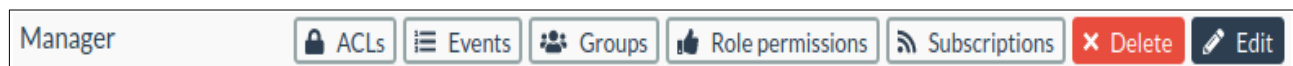3. Enter a label to identify the role.

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.

How-to

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


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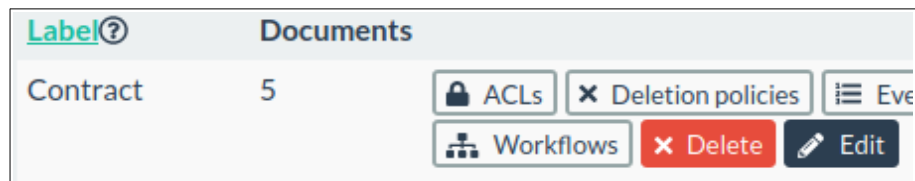
3. Select permissions from the right <u>Granted permissions</u> list then **double click** or click *Remove* button to remove permissions.

6.5 Restrict document viewing based on document type

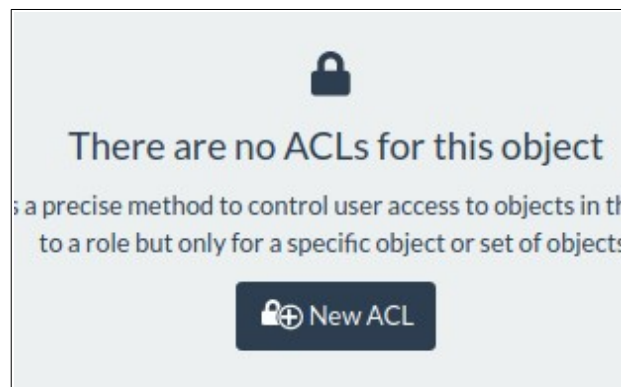1. Click Document types: *View details* or go to the *System → Setup → Document types.*
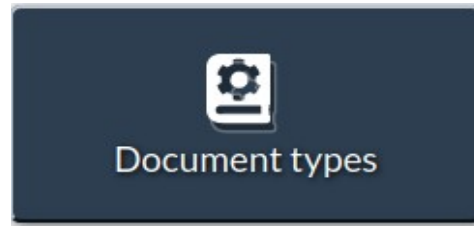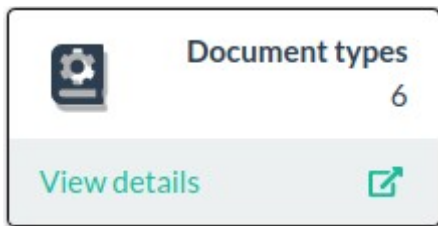
2. Click *ACLs* of one document type

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 <u>Available permissions</u> list, **double click** or click *Add* button to grant permission.

Available permissions

Documents
    Create documents
    Create new document versions
    Delete documents
    Download documents
    Edit document properties
    Edit documents
    Execute document modifying tools
    Print documents
    Restore trashed document
    Revert documents to a previous version
    Trash documents
    View documents
    View documents' versions list
Events
    Access the events of an object
File metadata
    Change document type file metadata settings
    Submit document for file metadata processing
    View file metadata

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

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