EVER TEAM

Content for your Business

EverSuite

Guide

Paperless processing - documents

[HDS]

TERMS AND CONDITIONS

Documentation

Version: **ES510 HDS-DEMAT.V1**

EverSuite software

TABLE OF CONTENTS

Conventions followed in this manual

Information
Additional Information about the current topic

Caution
Special warning on a particular point of usage which could lead to a serious malfunction.

In case of difficulty…
Technical solution to a problem.

Reference
Reference to another EverSuite guide.

See
Link to another paragraph

INTRODUCTION

The EverSuite **ES-HDS** service helps enterprises move towards paperless document management. It replaces "paper" procedures with electronic exchange, by making information available digitally without any paper copies.

ES-HDS is a tool for filing digital data hierarchically and thematically: it brings together in **a single electronic folder** diverse documents: orders, invoices, assorted mail, technical documents etc. It simplifies filing by using **automatic filing rules**. The same document can be put in several folders without duplicating it physically

ES-HDS enables you to implement **automatic filing** for your company's shared data, provided they are declared in EverSuite. An ES-HDS user then has access to a **tree view** in which to search for data.

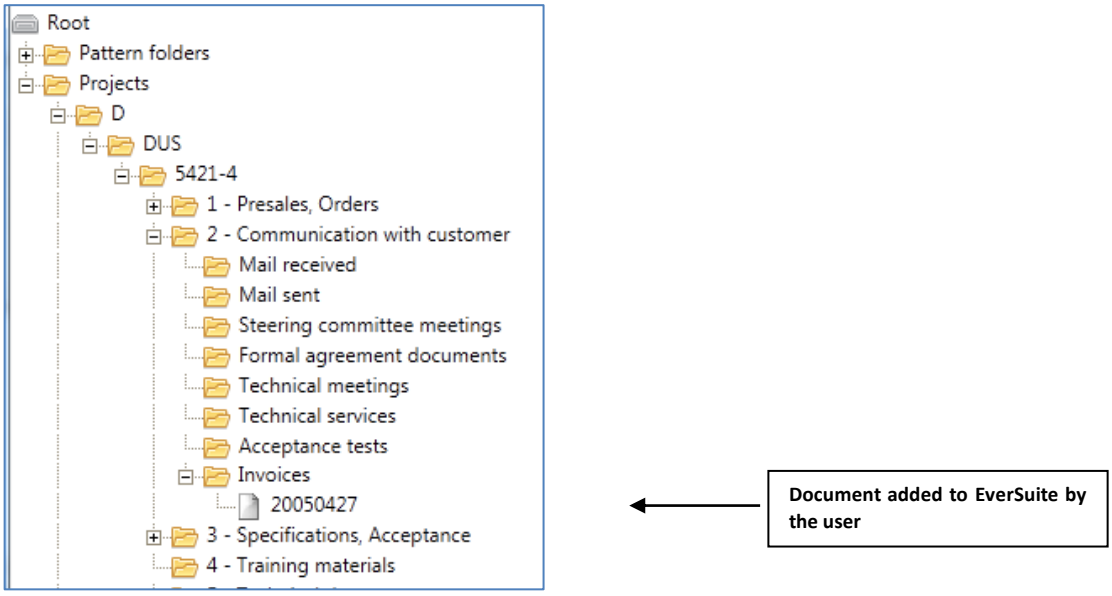


Figure 1: Tree view example

Various tools are provided to facilitate document searching:

- browsing the tree view
- using a search/profile form
- searching a whole folder
- searching a folder item.

Security may be applied to folders and folder items (rights to view, update, copy, etc.) depending on users' rights.

The **ES-HDS** administrator interface contains the following menus:

Figure 2: Administrator interface

- Folder and item search using profiles
- Input
- Filing hierarchy for application data or objects
- Migration configuration and tools
- Return to the standard EverSuite interface.

The first three menus are the basic user tools.

- **Search** offers all the search modes available in EverSuite for accessing documents via their metadata.
- **Insert** gives access to all the profile forms available for data entry.
- The **tree view** lets the user search and display his documents in the filing plan predefined by the enterprise.

The **configuration** tool is reserved to your application's functional administrator. There, she can declare:

- profiles
- Filing rules
- system parameters
- interface parameters
- other import and export services.

The **migration** tool is for migrating an application to a new version of EverSuite. This tool is run when starting a new version.

In this guide, we will address the following topics:

- Basic definitions and concepts
- Initializing the ES-HDS service
- User and administrator operations
- Configuration

1 OVERVIEW

ES-HDS provides a way of filing your digital data. They are filed:

- by **type of data**
- according to predefined **filing rules**
- based on folder **tree templates**
- depending on:
- users' **rights** (roles)
- **rights** defined on the folders.

ES-HDS is based on typing items to be filed, saved in **Profiles** which may be "objects" (documents) or "folders" (folders which contain these documents).

ES-HDS's **tree view** displays these folders (or nodes) in a hierarchy which includes their associated documents.

ES-HDS depends on the different components of the service. It works with its own system tables which must be in the same database as the data tables being used. We will refer to this database as the ES-HDS database.

ES-HDS also depends on ES-PRF, the service which manages profiles, and ES-SIS, the indexing service.

Before describing the system's features, we will look at a few concepts.

1.1 DEFINITIONS

Object

In ES-HDS, an item is a record in one of the data tables in your application. This record usually contains metadata for one or more attached documents. These metadata are also known as "attributes".

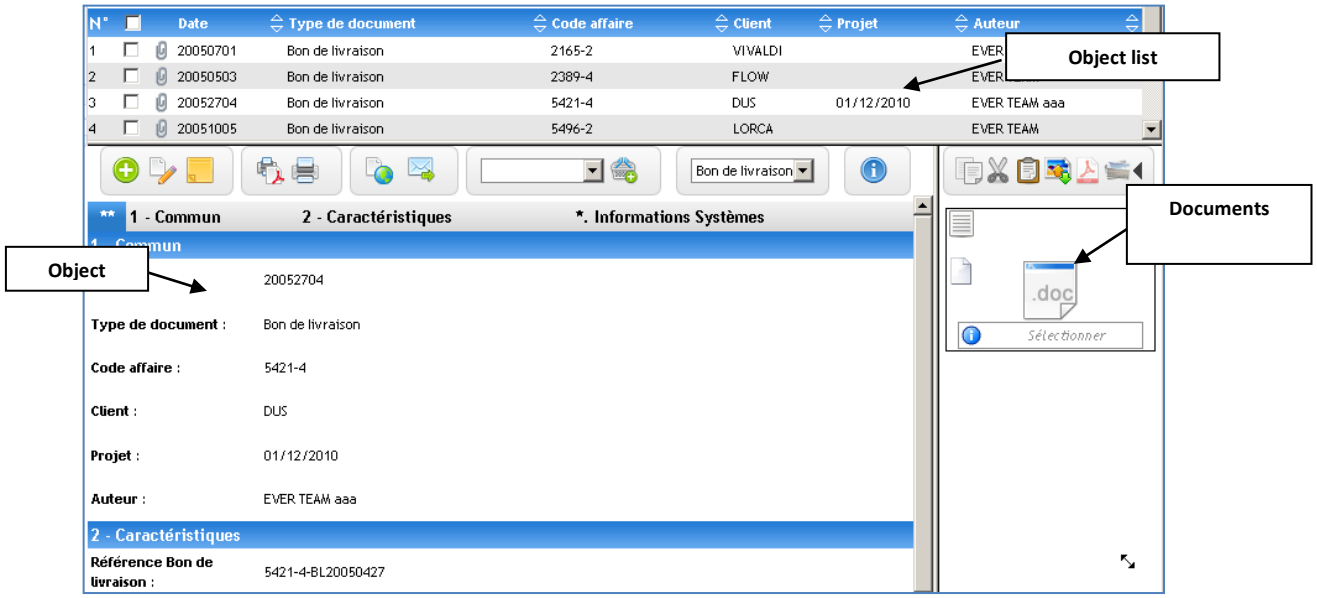


Figure 3: Item

Profile

In EverSuite, a profile is always associated with a data table. It makes it possible to differentiate between records within a table and to define a record "lifecycle", using purges.

Within **ES-HDS**, the profile is used to "type" an item [Object] or a folder [Folder] and also to associate it with graphical attributes and WorkFlow processes, if desired.

Profiles are used in **searches** to speed up the query and make it possible to define specific **rights** on items for users or roles (groups of users).

Profile rules

- A record belongs to one and only one profile
- A profile is for one table only.
- A table may be governed by several profiles.

Document type for a folder

The document types which can be used to define a folder's content correspond to "Object" profiles, each profile being associated with a data table or a view displaying a set of records.

Thus when filing a document, the system looks for the subfolder containing this document type (this profile) in the "node" folder deduced from the filing rule (e.g. Case code). If several folders contain the same type of document, this document will be filed in all these folders.

At the same time, a folder may contain several types of document. In this case, it is associated with a "Group" profile and refers to several profiles. This profile does not need to be associated to any particular data table.

Folder type

The types of folder which can be given to a folder correspond to "Folder" profiles.

However, a "Folder" profile may also be associated with a data table (e.g. Customer folder associated with the Customers table) or not. In that case, it is simply a **node** in the tree view and acts as a root node for a rapid overview (e.g. the "Case code" node in the previous examples).

Thus the Case code folder used for a quick view of an item, not associated with a table.

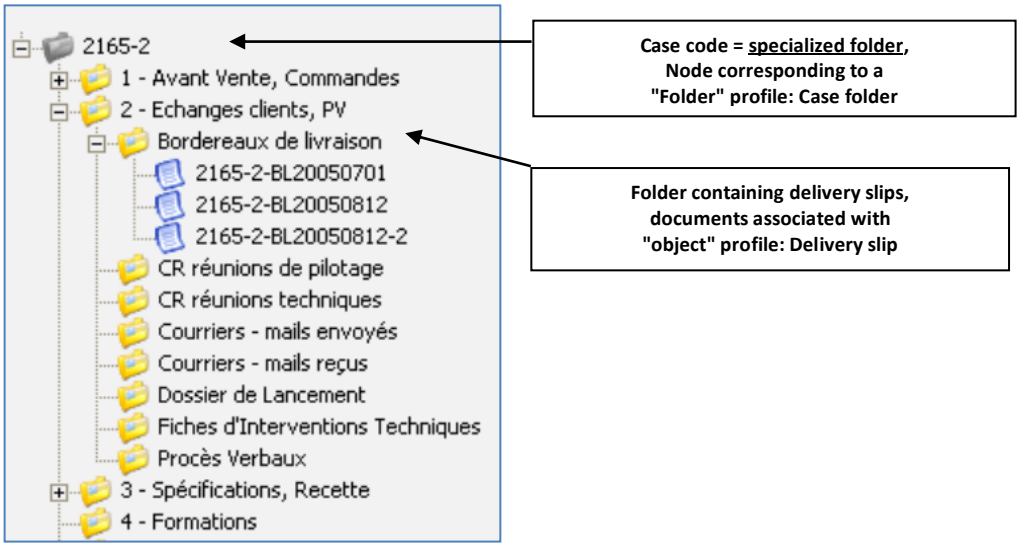


Figure 4: Case code folder

The whole tree view would look like this:

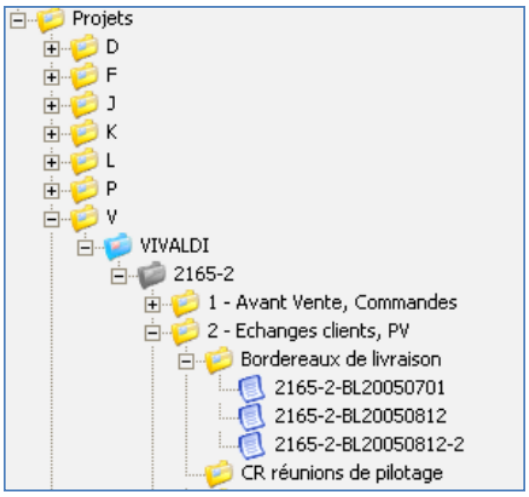


Figure 5: Expanded tree view

ES-HDS tree view

In ES-HDS, a folder is a **filing folder**. It groups together several items meeting the same definition criteria or several subfolders.

Rights are declared for each folder, often inherited from the master folder.

Pattern folder

Parts of the tree view may be predefined by your application's functional administrator. These are the pattern folders. A pattern folder is a **template** for a folder with subfolders used for automatic filing.

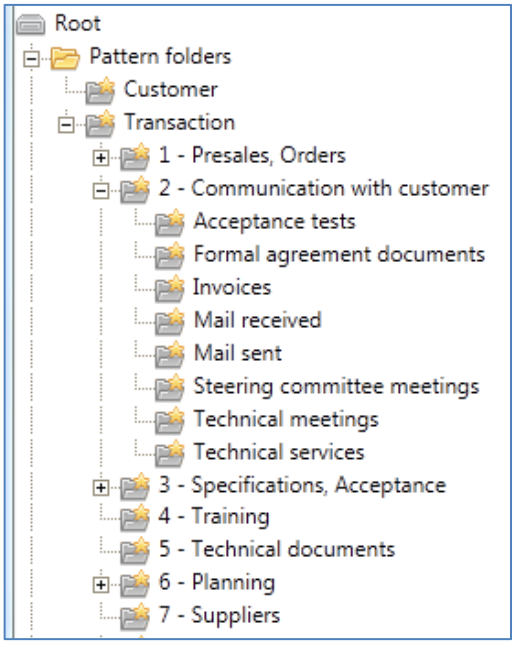


Figure 6: Example of a pattern folder = Case Code

Each pattern folder has its own rights defined for roles or users.

Figure 7: Rights on a pattern folder

Generating the tree

When filing an item, the necessary folders and subfolders are located in the existing tree or created dynamically, using very precise filing rules, defined by the functional administrator.

The tree is automatically deployed when something is filed, and may be added to by a predefined tree if a pattern folder (template) is applied.

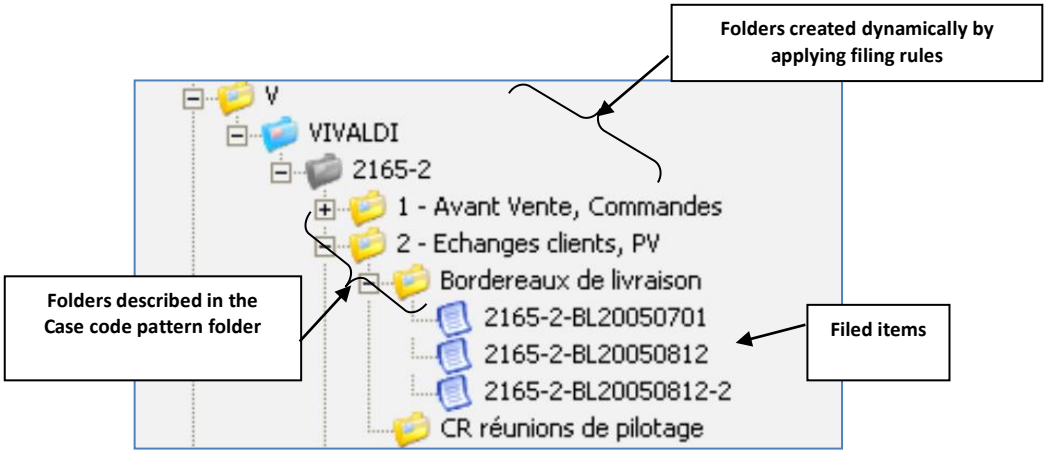


Figure 8: Tree view generated when filing

Filing rule

A filing rule is used to file an item saved by the user depending on its metadata. These apply to the documents the user is processing.

A filing rule consists of:

- one or more rules defined for a given profile,
- a **SQL condition** acting as a preliminary filter before filing,
- a **pattern folder** providing the template for the folder and subfolders used for filing,
- a **destination folder** indicating the tree view root,
- a folder **path** based on metadata, or in fixed text,
- the name of an item containing a metadata element or the first column (by default).

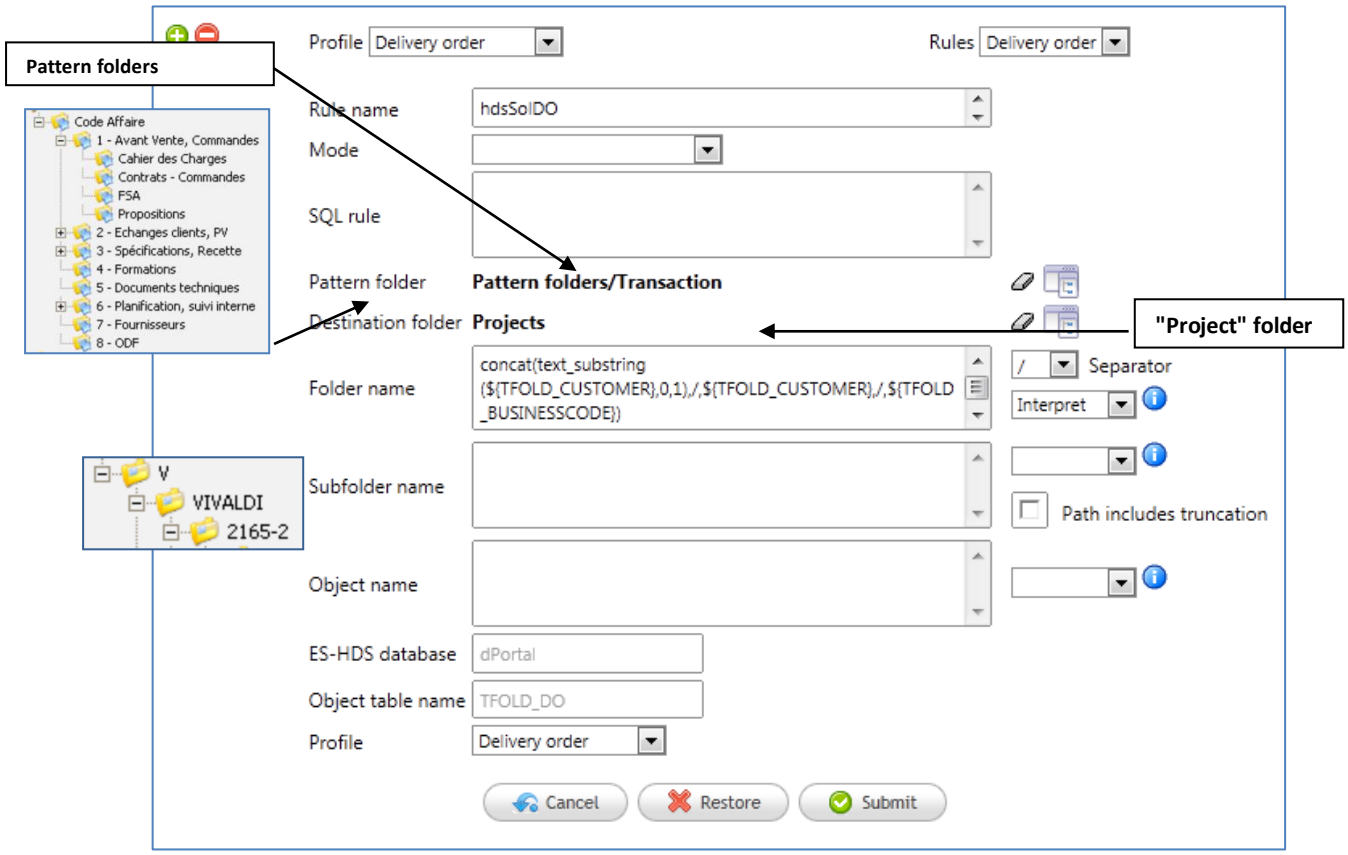


Figure 9: Example of a filing rule for a "Delivery Order" profile

2 INITIALIZATION

ES-HDS is implemented by your application's functional administrator.

2.1 PRELIMINARY RULES

- The data tables managed by **ES-HDS** must be tables declared in your EverSuite application. They must contain a uniqueness field, declared as the EverSuite counter.
- The **ES-HDS** system tables must be in the same database as your data tables.
- The **ES-PRF** system tables must also be in the same database as your data tables.
- The users who will be working with ES-HDS must be declared and have access to the ES-HDS system tables and to the data tables.

2.2 IMPLEMENTATION PROCEDURE

The **ES-HDS** service works with the **ES-PRF** profile management service. You should therefore create the system tables necessary for both services. These system tables can be created by using the initialization tools available for both services and to deploy a database for the ES-HDS service.

2.2.1 Initialize ES-PRF

Click on the Services > ES-PRF > Configuration > Configuration > Initialize profiles menu.

Reference
Please refer to the EverSuite PRF Profile Management guide.

2.2.2 Initialize ES-HDS

Initialize the system tables

Click on the Services > ES-HDS > Configure > Migration > Initialize menu.

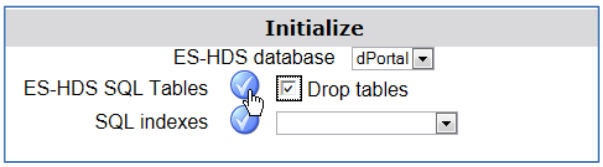


Figure 10: Initializing the ES-HDS tables

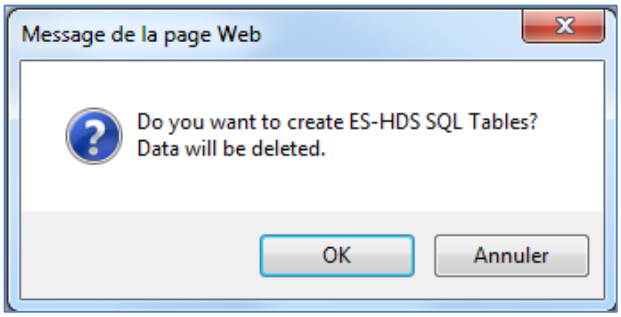


Figure 11: Request for confirmation before initializing the ES-HDS tables

Declare indexes on application tables and on the folder table

The folders are the nodes of the tree view and are stored in the **HDSNODE** table. You can configure SQL indexing on this table straightaway, in order to speed up folder searching.

Choose the table to index: **HDSNODE**

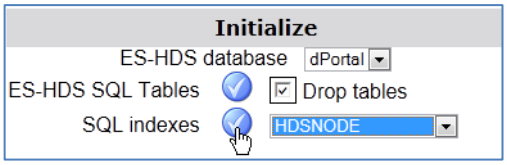


Figure 12: Initializing and indexing ES-HDS tables

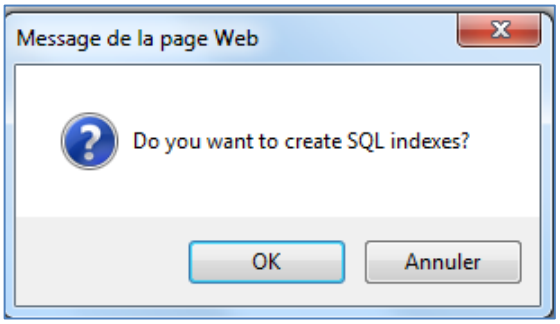


Figure 13: Request for confirmation before initializing and indexing ES-HDS tables

Deployment

Deployment is for creating or updating **HDS** system tables, demonstration tables, along with associated profile, roles and users.

⇨ Click on the **Deployment** option.

After deployment, EverSuite invites you to sign in again. It is recommended to restart the application server.

Using the Administration > Data sources > Relational menu, you can check that the following tables exist:

☐	dPortal	HDSDATALST	HDSDATALST	Object list
☐	dPortal	HDSDATATYPE	HDSDATATYPE	Profile
☐	dPortal	HDSNODE	HDSNODE	Folders
☐	dPortal	HDSNODELST	HDSNODELST	Folder list
☐	dPortal	HDSNODERIGHT	HDSNODERIGHT	Folder rights
☐	dPortal	HDSOBJECTRIGHT	HDSOBJECTRIGHT	ObjectRights
☐	dPortal	HDSRULESOBJ	HDSRULESOBJ	Rules
☐	dPortal	HDSSTAT	HDSSTAT	Statistics

Figure 14: ES- HDS system tables

☐	dPortal	TFOLD_CUST	TFOLD_CUST	Customer
☐	dPortal	TFOLD_DO	TFOLD_DO	Delivery order
☐	dPortal	TFOLD_PVREC	TFOLD_PVREC	Sign-off documents
☐	dPortal	TFOLD_STARTDOC	TFOLD_STARTDOC	Initial agreements
☐	dPortal	TFOLD_TI	TFOLD_TI	Technical services

Figure 15: Data tables (visible in the filing plan)

☐	dPortal	PRFHDS	PRFHDS	Gestion des Profils/Services
☐	dPortal	PRFMMS	PRFMMS	Profile/Service management
☐	dPortal	PRFODS	PRFODS	Profile/Service management
☐	dPortal	PRFPRJ	PRFPRJ	Profile/Service management
☐	dPortal	PRFPROFILES	PRFPROFILES	Profiles Management
☐	dPortal	PRFRULES	PRFRULES	Profile rule management
☐	dPortal	PRFSAE	PRFSAE	Profile/Service management

Figure 16: Profile tables

Check profiles

This option lets you check the state of the databases after deployment.

⇨ Click on the Services > ES-HDS > Configure > Migration > Use profiles menu.

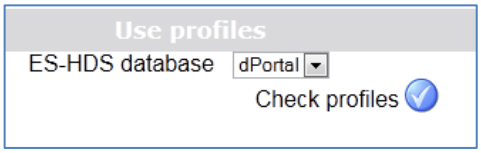


Figure 17: Checking use of profiles

The Check profiles option displays profile configuration:

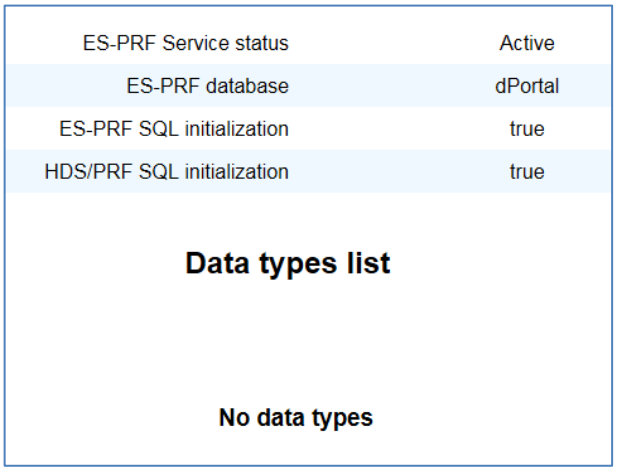


Figure 18: Display of profile configuration

2.2.3 Configure ES-HDS

The ES-HDS parameters are all declared with a default value, which you may modify at any time.

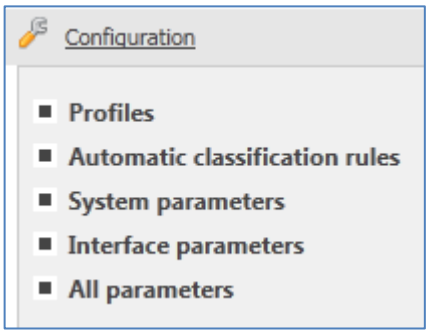


Figure 19: Configuration menu

In the Services > ES-HDS > Configuration > Configuration > All parameters menu, it is a good idea to check the **hdsDBName** parameter: the database containing the ES-HDS system tables (*dPortal* by default).

Using the Services > ES-HDS > Configuration > Configuration > System parameters menu, it is a good idea to check the **hESHDSParameters** parameter.

1.2 CUSTOMIZE YOUR HDS APPLICATION

The administrator can totally customize an HDS application by indicating which data tables are to be displayed in the filing plan.

The menus available by default are for input, searching as well as for the filing plan, and administration (Configuration).

The administrator then declares roles and users for the application.

2.2.4 Declare the data tables in the tree view

Using the EverSuite administration console, the administrator can manage the tables handled by the service as well as the associated roles.

Menu: Administration > Security > Administration console

- Under the [Applications] heading, enter *hds* and click on the ES-HDS item which is suggested,
- Click on the [Application overview] option.

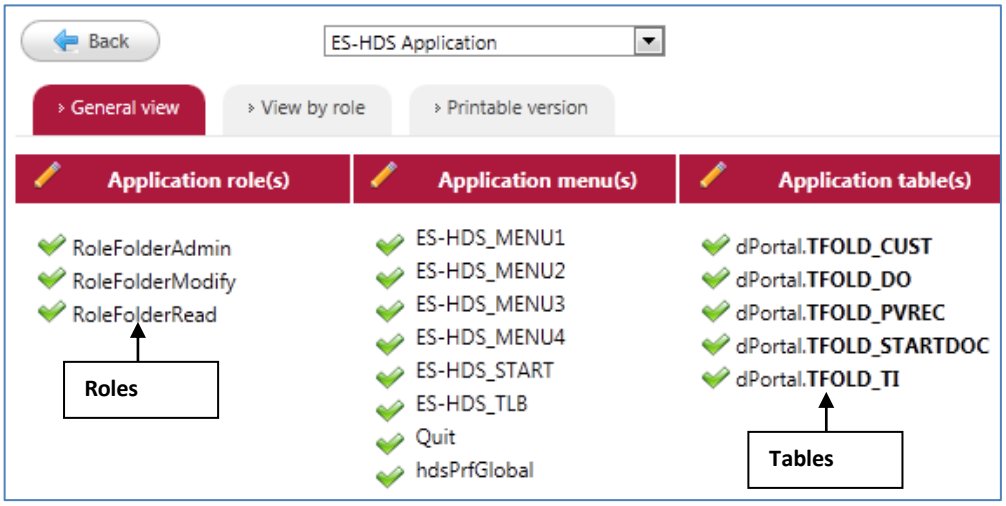


Figure 20: Configuring the ES-HDS application in the administration console

2.2.5 Declare ES-HDS users and roles

You should declare at least one "Application administrator" user who will have access to all features and to the EverSuite interface, and a "user" with minimal creation and viewing rights To be able to view, a user must have access rights on ES-HDS tables and on application data tables.

The three default roles defined when deploying the service are:

11			49	RoleFolderAdmin	FOLDER Administrator
12			50	RoleFolderModify	FOLDER Modifying Role
13			51	RoleFolderRead	FOLDER Reading Role

Figure 21: Default ES-HDS roles

To declare roles, use the Administration > Security > Administration Console menu, [Roles] heading:

- Expand the section by clicking on the "+",
- Choose the [Add, delete, manage roles]option ,
- Click on the + [Create role].

To declare roles, use the Administration > Security > Administration Console menu, [Users] heading:

- Expand the section by clicking on the "+",
- Choose the[Add, delete, manage users] option ,
- Click on the + [Create user].

2.2.6 Declare indexes on application tables and on the folder table

If you want to test full text searching immediately, it is good to define an index on the application tables and the folder table.

Some folders are "nodes" of the tree view and are stored in the **HDSNODE** table. The SQL index on the **HDSNODE table was** put in place when initializing (above).

Full text indexes are declared and generated in the **ES-SIS** service.

Services > ES-SIS > Index management menu:

- Create an index **IndexHDS**, using the tool [Create new index]

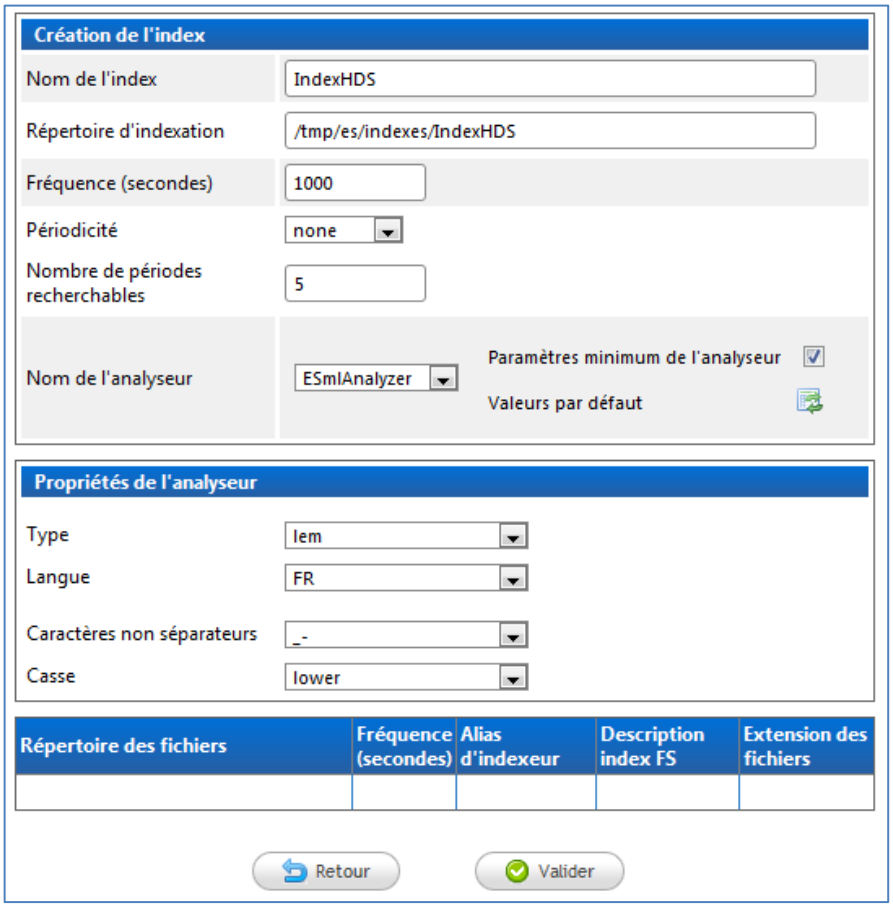


Figure 22: Creating an index

- Open the form for associating tables to the index, using the tool [Associate with tables]

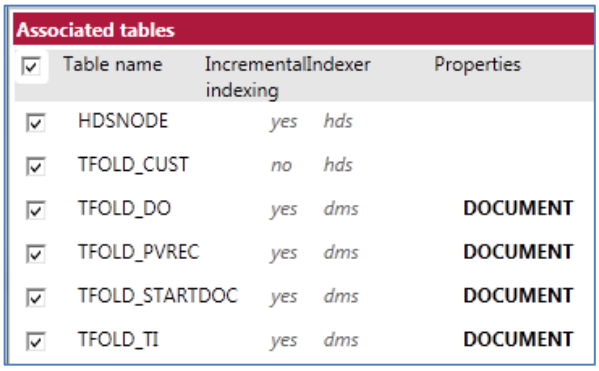


Figure 23: Tables associated with indexHDS (hds and dms indexers)

To declare an `hds` or `dms` indexer on each table and to set up automatic update, you must access the table structures via the Administration > Data source > Relational menu.

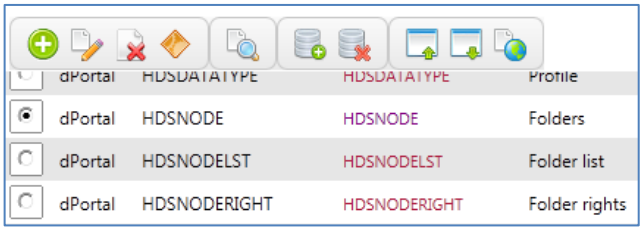


Figure 24: Accessing the structure of the HDSNODE table

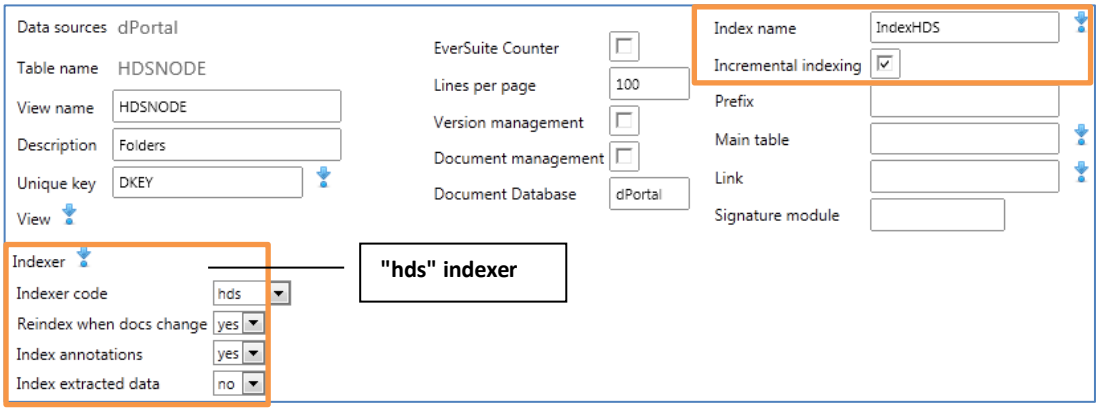


Figure 25: Metadata for the HDSNODE table

Reference
For more information on indexing, refer to the EverSuiteES-SIS index management guide.

2.2.7 Declare the profiles associated with the data tables

Defining profiles on the tables makes it possible to associate specific rights with them based on roles and filing rules in the HDS tree view, using the ES-HDS > Configure > Configuration > Profiles menu.

- [Manage profiles] option
- [HDS: Manage profiles] option

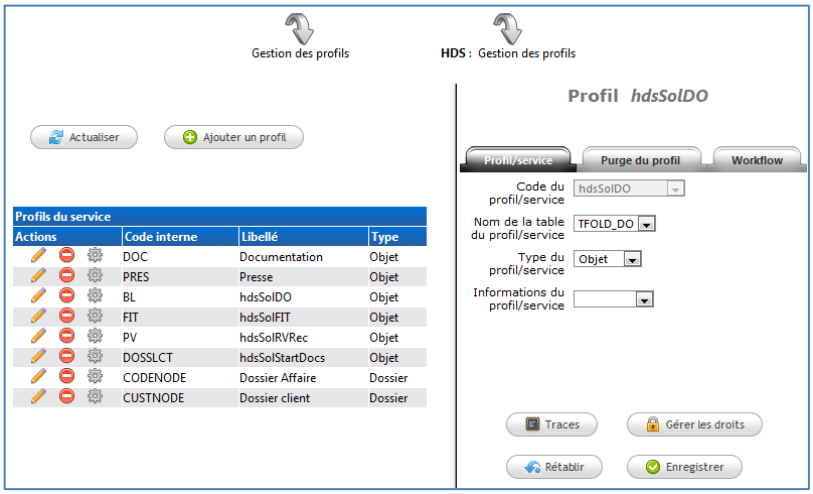


Figure 26: Managing ES-HDS profiles

3 USER OPERATIONS

Adding new records to the application amounts to filing them in the ES-HDS tree, according to the rules which have been defined for them. These records are then referred to as objects in ES-HDS. The tables affected must have been declared in ES-HDS. Records which already existed may be filed manually.

These objects are managed according to the rights set up on the pattern folders.

3.1 ES-HDS RECORD HANDLING

3.1.1 Creating an object in a table

Each time a new record is created, ES-HDS files it according to the rules defined by the application administrator. An object may be created via:

- standard EverSuite input
- Integrated desktop
- digitization of a batch of documents.

Entering a record and digitizing the attached document

A new object can be entered in the usual way:

- either in a menu specific to your application,
- or in the ES-HDS interface via the [Insert (Profiles)] menu

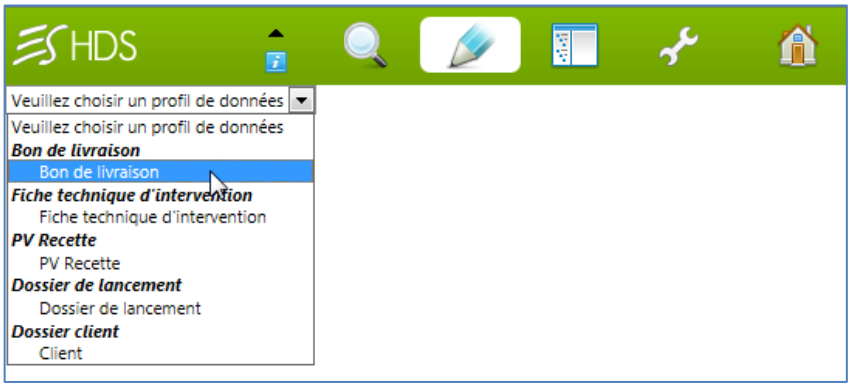


Figure 27: Managing ES-HDS profiles

- or in the ES-HDS interface, after browsing the tree view or running a search. Click on the icon [Add] to open the input form. Profiles are taken into account.

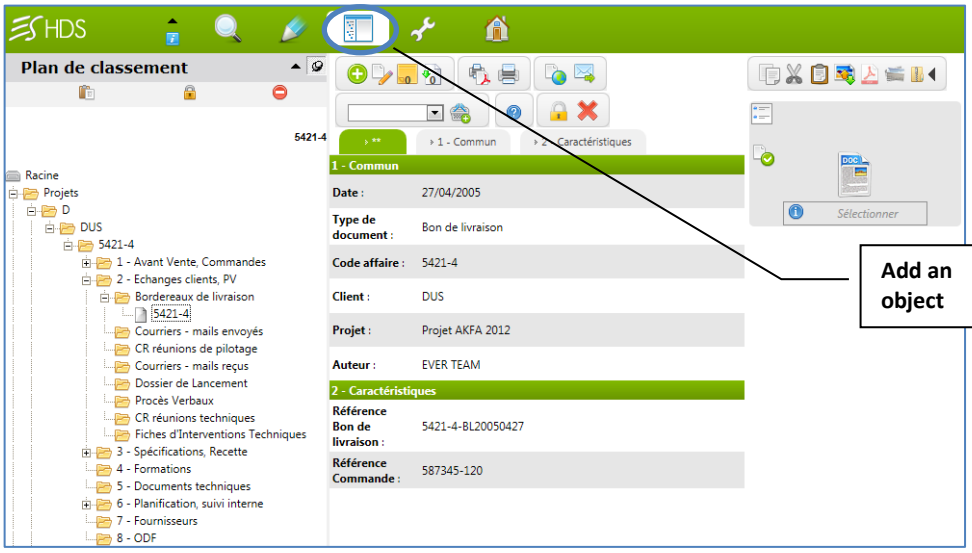


Figure 28: Adding an object

Example

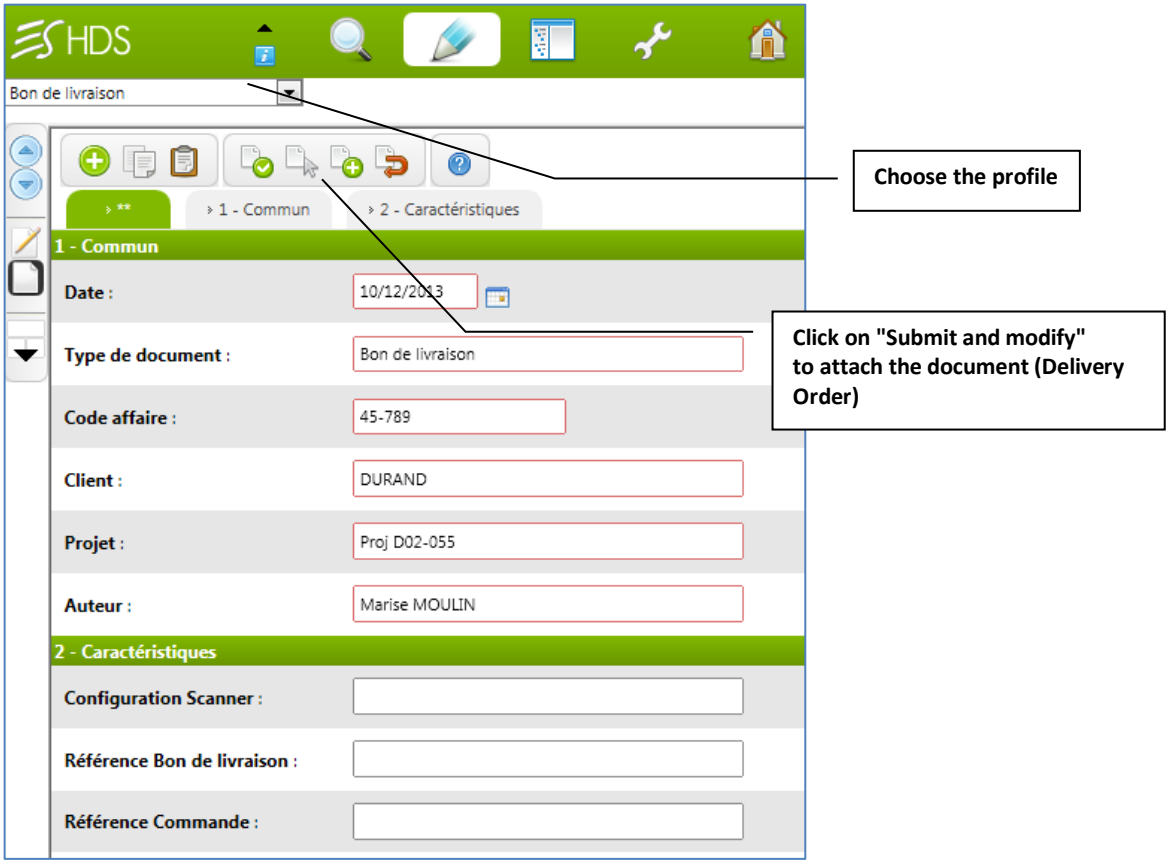


Figure 29: Saving a new delivery order

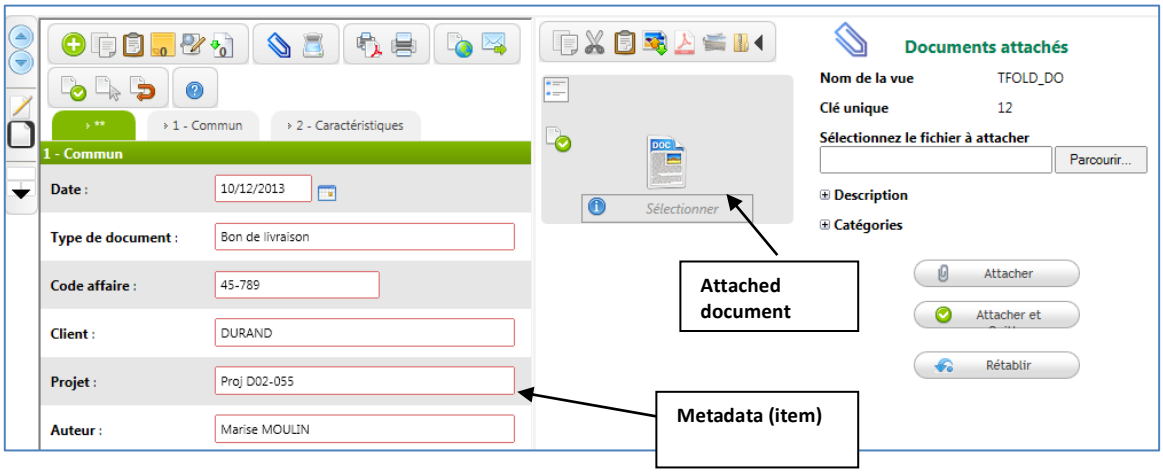


Figure 30: Form for inputting a delivery order and attaching a document

The input screen is based on the table declaration in EverSuite. Fill out the necessary fields and validate, using the buttons on the top right of the form:

Figure 31: Configuration menu

- Validate and return to the object list
- Validate and open the new object for update
- Validate and open a new input form
- Cancel

Validate the record by clicking on the add tool.

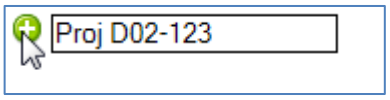


Figure 32: Add tool

Batch scanning

Batch scanning is handled in EverSuite by the ES-SCP service. This service permits description of batches in EverSuite records (batch metadata). If this table is associated with a profile, the profiles service sends an alert to the services which use this profile.

Thus, a digitized batch may be managed by ES-HDS and automatically filed in the tree view.

Reference
For more information on batch scanning, please refer to the EverSuite ES-SCP guide.

3.1.2 Automatic filing

After any addition of data to the application tables (by direct input or after scanning a batch of documents), ES-HDS files the record automatically in the tree based on its metadata (or attributes), **if the table it is in is associated with a profile**.

Rules are defined based on these metadata to decide which folder the object should be filed in (virtual folder). If the folder does not exist, it is generated automatically along with any subfolders.

If the object which has just been created matches the condition in the filing rule, it is automatically filed in the folder whose name has been predefined in the rule.

An object may be filed based on:

- a path deduced from the information the object contains,
- a default location defined for the folder (in the rule).

Example: the "BL 13-23 20070109.doc" delivery order (created above) is filed in a VIVALDI folder (customer) >13-23 (Case code). Below each case code, you have the whole tree described in the pattern folders.

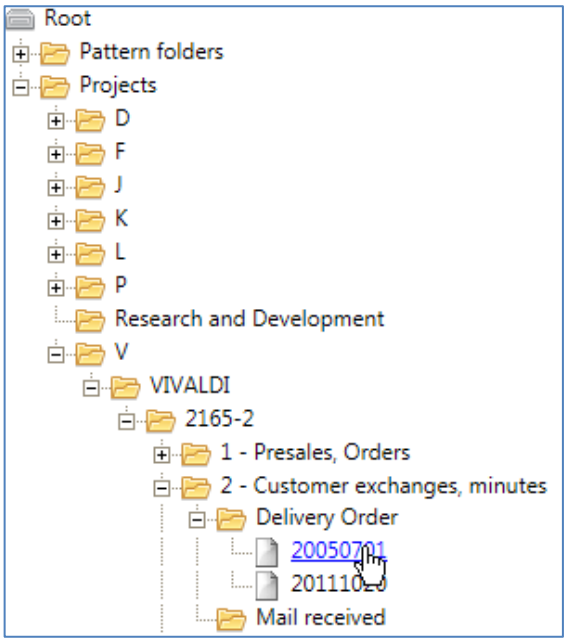


Figure 33: Automatic filing

3.2 VIEWING RECORDS

3.2.1 View in the filing plan

The tree view is available in the [Filing plan] menu:

Any record filed by ES-HDS becomes an object in the filing plan. You can browse the tree rapidly and access your document by opening the relevant folders.

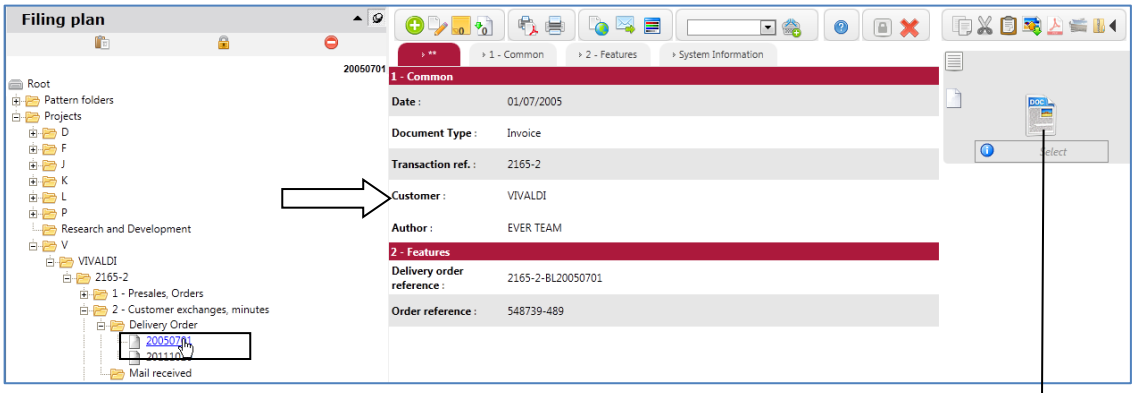


Figure 34: Viewing a document in the filing plan

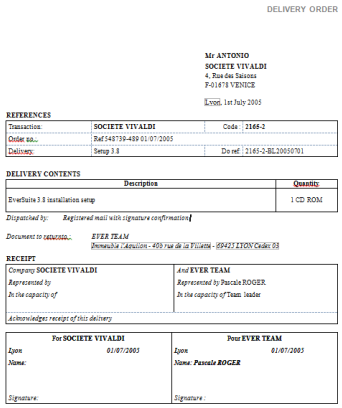


Figure 35: Original document

3.2.2 After a quick search

The quick search uses profiles to filter the search by record type. The types of search available are the standard EverSuite modes (simple, advanced or expert) in SQL and Full text, plus a folder search (at the end of the list of profiles).

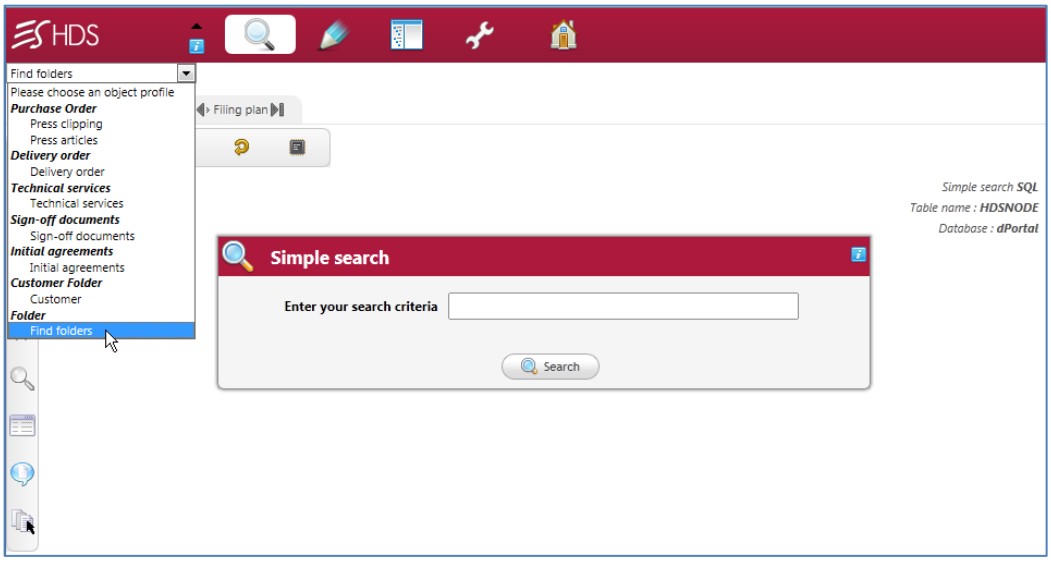


Figure 36: Find folders

3.2.3 Search by folder name

A folder search is carried out on the "nodes" of the tree and lets you display directly the part which matches the search.

Thus, for example, if the search is on "LORCA"

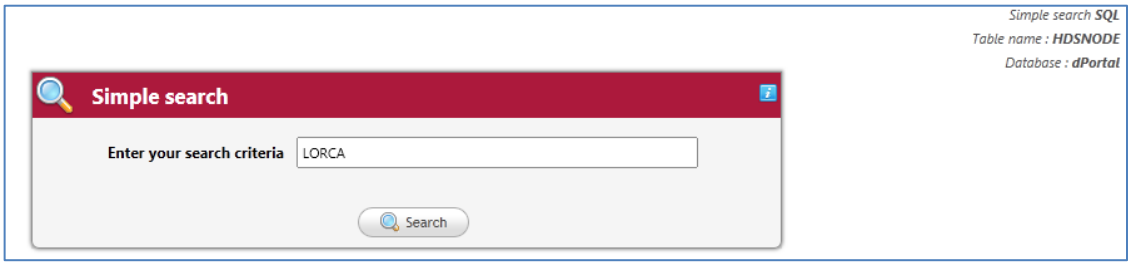


Figure 37: Search for LORCA folder

When you click on a line in the results list, the tree is displayed starting with the "LORCA" folder:

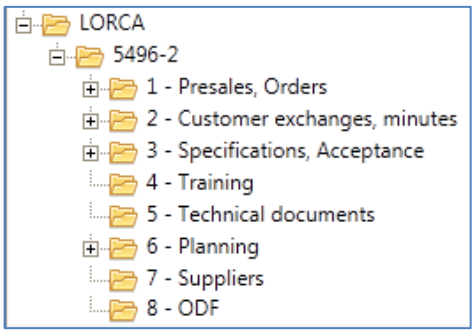


Figure 38: Displaying the tree starting from a folder

If the search is for "5496-2":

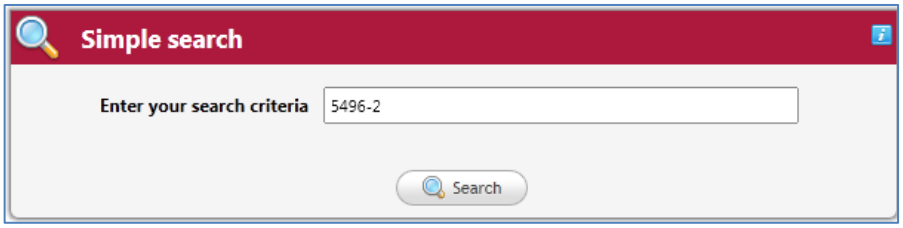


Figure 39: Search for 5496-2 folder

When you click on the result line, the tree is displayed starting with the "5496-2" folder.

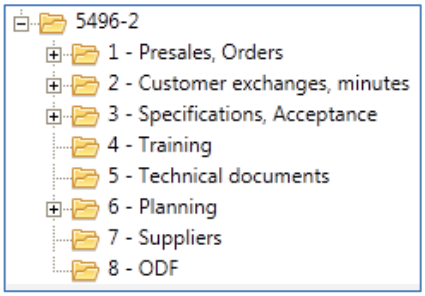


Figure 40: Displaying the tree starting from a subfolder

4 DETAILED USER OPERATIONS

The ES-HDS interface includes all viewing and searching operations. However, the **features associated with them** depend on a user's rights.

In this chapter, we will present each operation in detail:

- Searching for items and folders
- Viewing and modifying records
- Filing automatically by applying rules.

4.1 SEARCH

A quick search can be run on all the tables associated with **profiles** used by ES-HDS. That is why any search starts with the choice of profile:

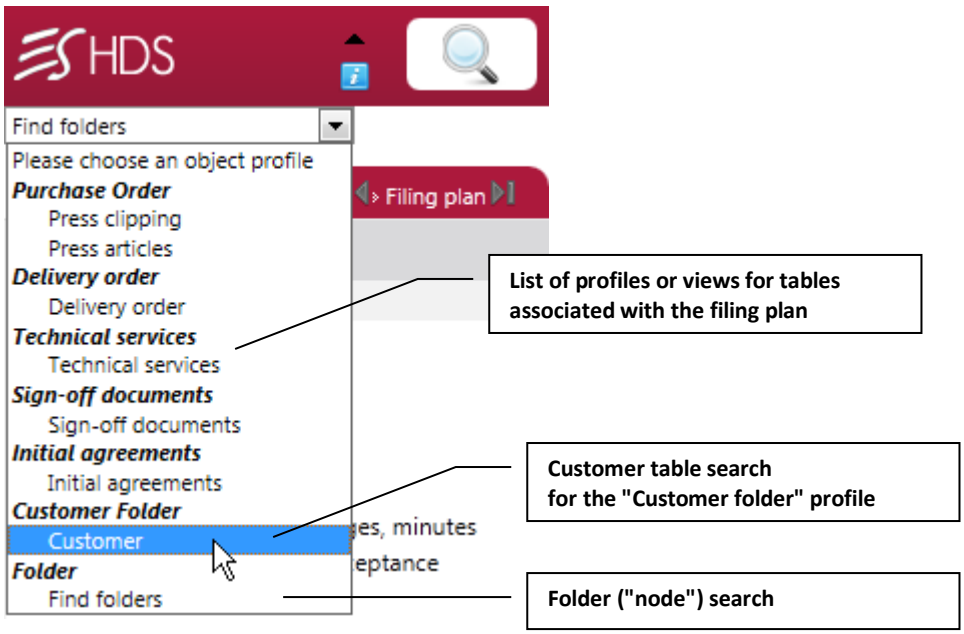


Figure 41: Choosing the profile and the search mode

4.1.1 Search modes

For each view chosen, ES-HDS offers the three standard EverSuite search modes in SQL and full text.

When describing data tables, for full text search (FT) you should choose the dms indexer, in order to index attached documents. For tables describing folders (e.g. **TFOLD_CUST:** Customers) and the "node" table (**HDSNODE**), the indexer to choose is hds .

Reference
For more information on searching with EverSuite, please refer to the EverSuite CORE Administration – Interface guide.

4.1.2 Item search

The search is carried out on a profile (e.g. Delivery order).

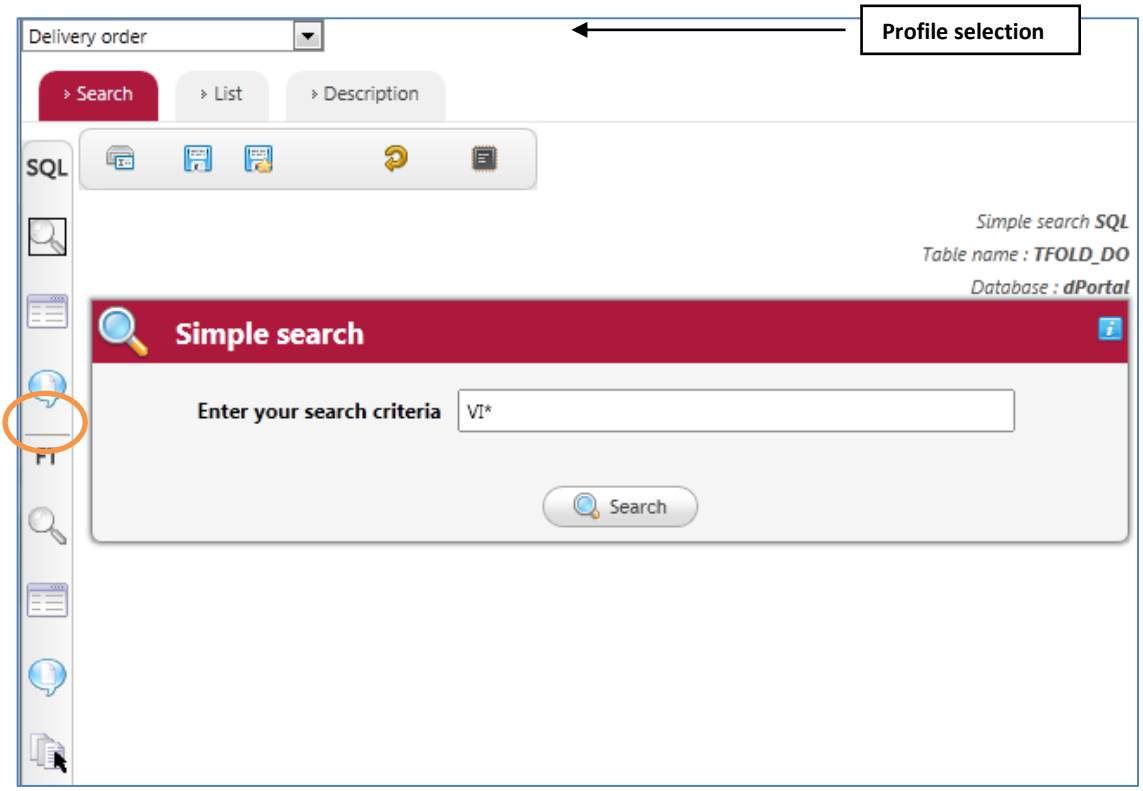
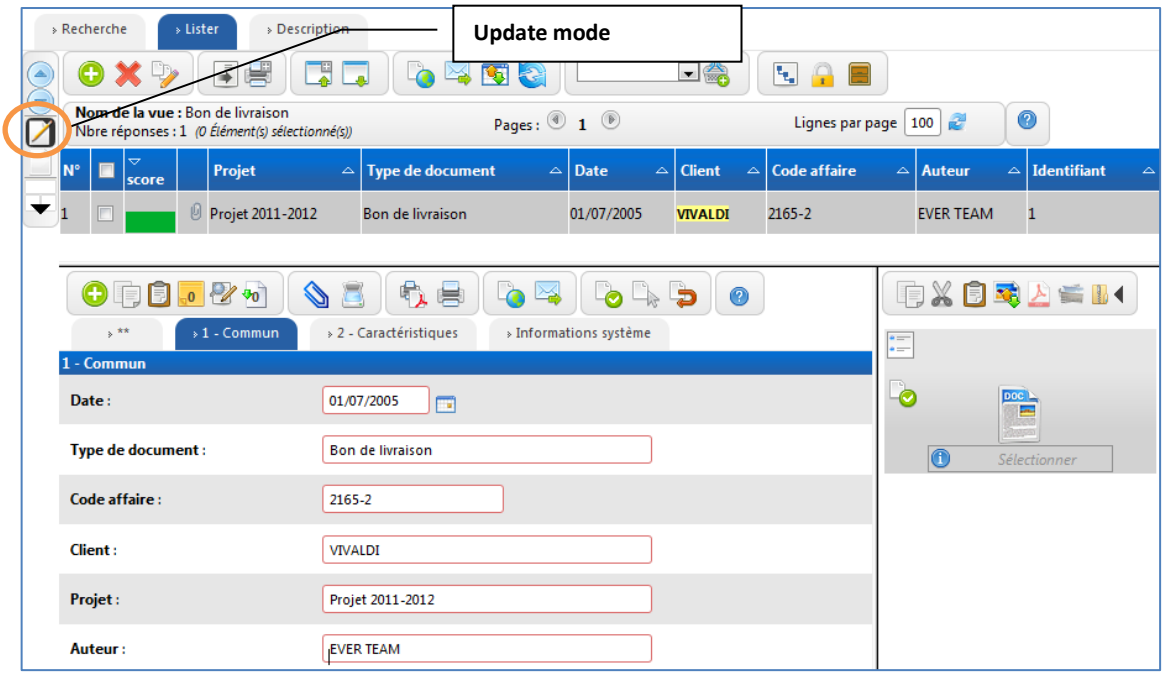


Figure 42: Selecting a profile for an item search



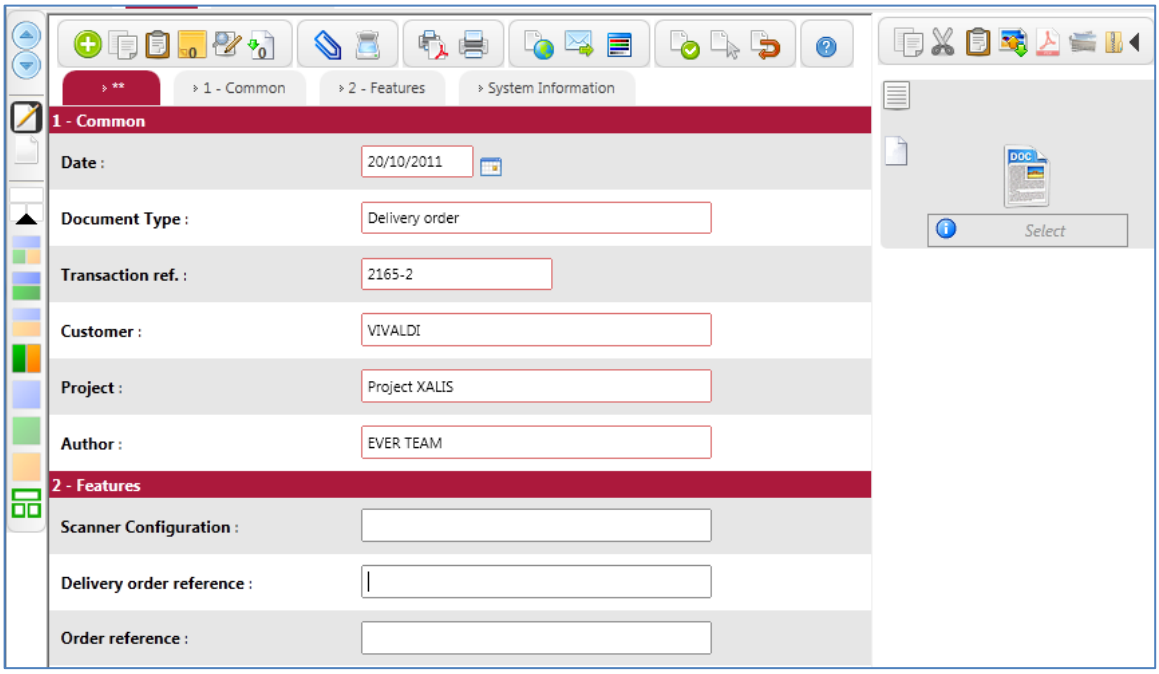


Figure 43: Updating an item

4.1.3 Folder search

The Find folder option is for searching nodes in the tree, on the following criteria:

- Folder name
- Parent folder name
- Folder type ("folder" profile)
- Document type it contains ("object" profile)
- A folder attribute (if the folder refers to a table, e.g. Customer")

Example: we are looking for all the folders which begin with "D", in a SQL query by example:

Query on the name

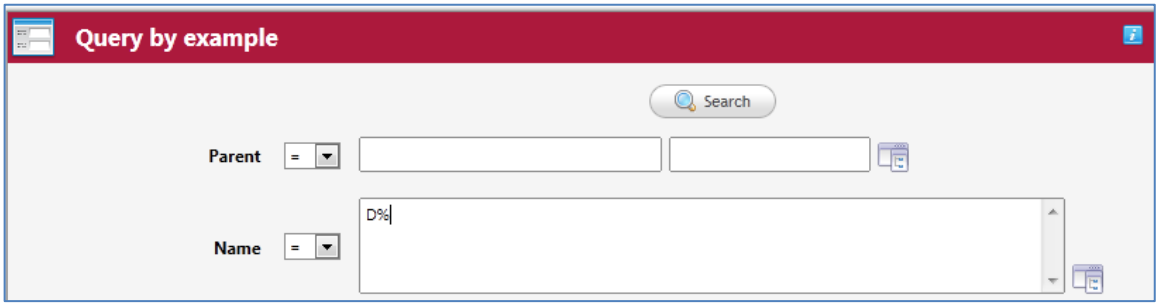


Figure 44: Searching on folder name

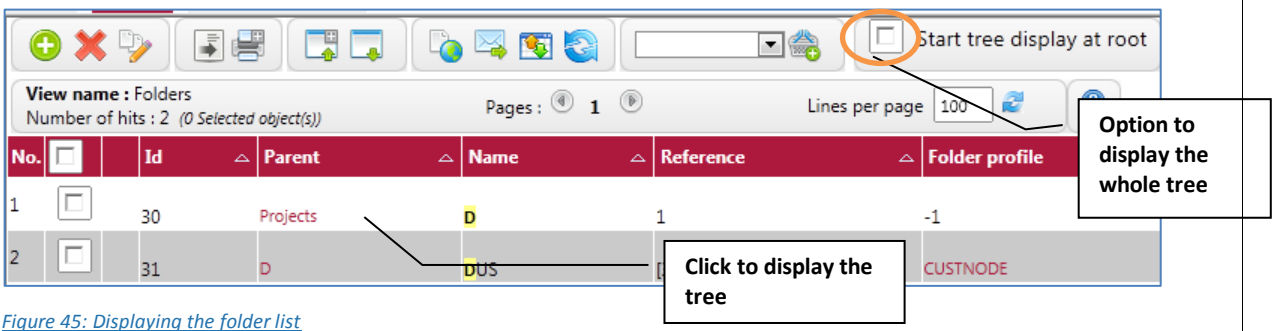


Figure 45: Displaying the folder list

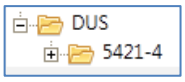


Figure 46: Viewing a folder in the filing plan

Before passing to the tree view by clicking on the folder name, you can choose which mode to work in by using the [View mode] and [Update mode] icons in the toolbar on the left.

In view mode the toolbar is:

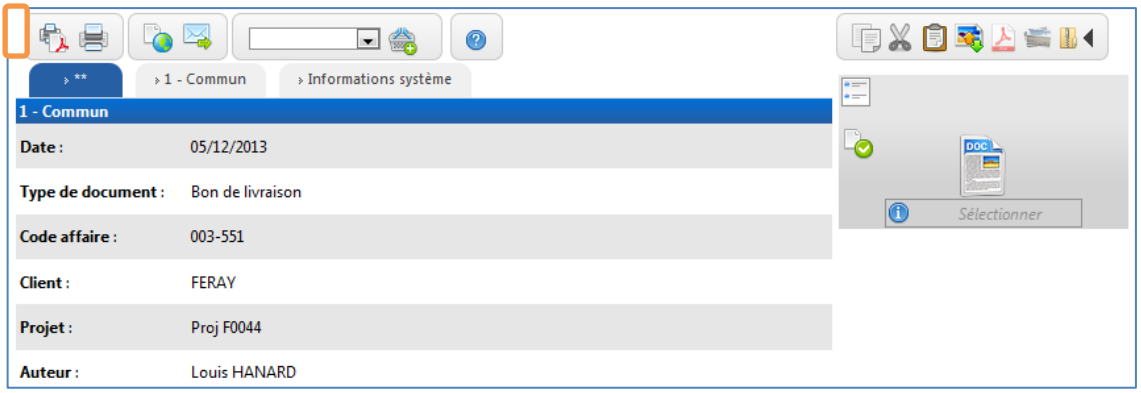


Figure 47: View mode toolbar

In update mode the toolbar is:

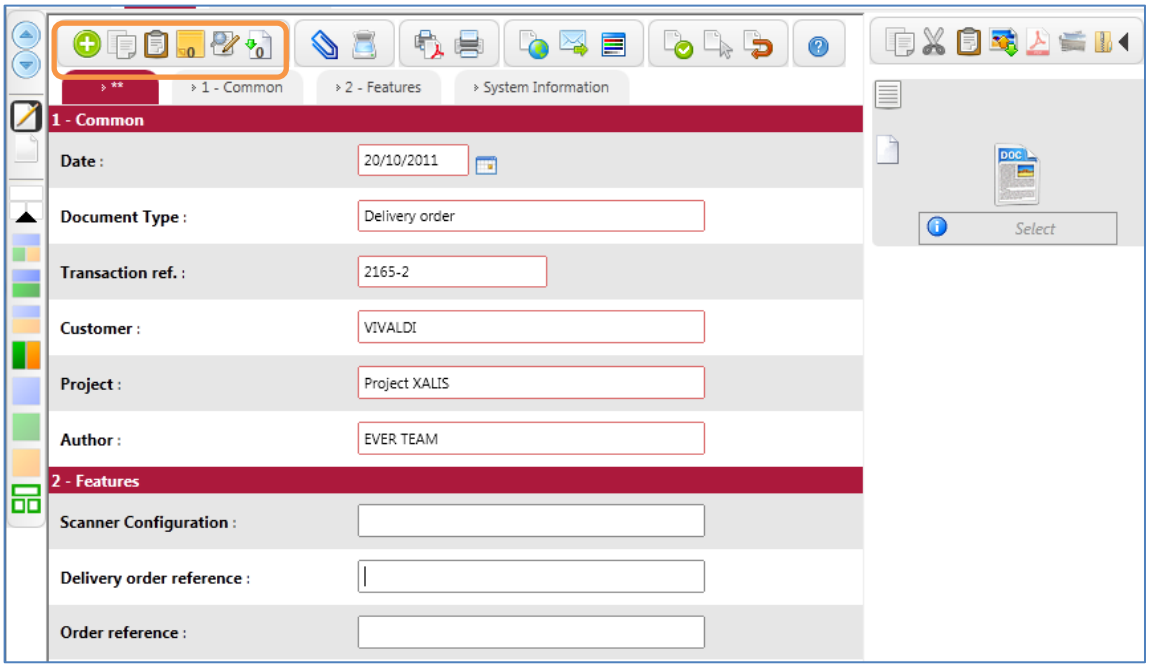


Figure 48: Update mode toolbar

The filing plan is displayed, with the tree deployed either starting with the selected folder or with the whole hierarchy.

Results list:

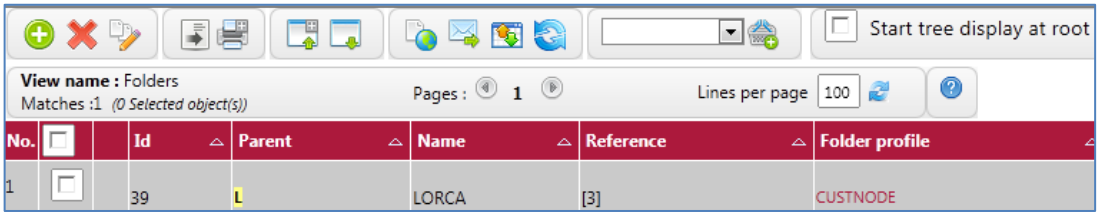


Figure 49: Results list example

Click on the line for the folder you wish to consult:

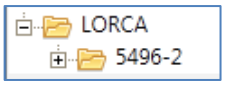


Figure 50: Displaying the folder tree view

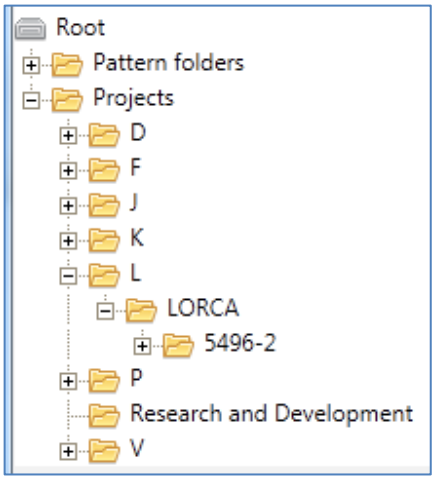


Figure 51: Displaying the whole tree (option checked)

Query on the parent identifier

Figure 52: Searching on parent identifier

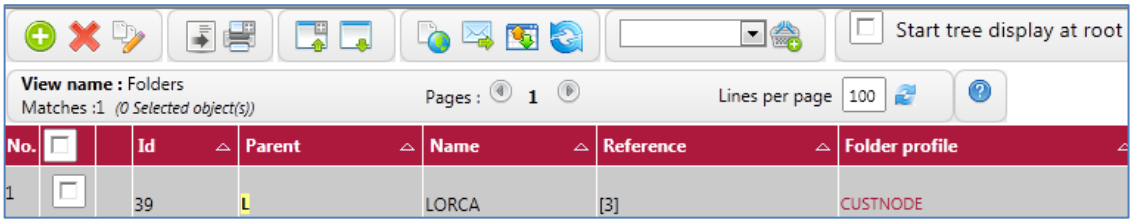


Figure 53: Displaying the folder list

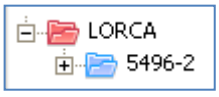


Figure 54: Displaying the tree view

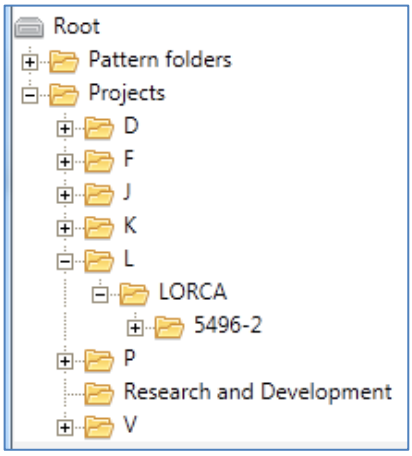


Figure 55: Displaying the whole tree (option checked)

You can navigate from one folder to another, using the arrows in the [Filing plan] tab:

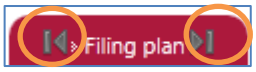


Figure 56: Filing plan tab

If you have checked some folders, you can only browse in the batch of checked folders.

Information on parameters

Parameters for setting up search: hdsDefaultSearch, hdsDfltNodeType.

4.2 VIEWING THE RESULTS LIST

Any search produces a results list from which you can view records and attached documents.

Before passing to the tree view by clicking on the folder or item name, you can choose which mode to work in by using the [View mode] and [Update mode] icons in the toolbar on the left.

4.2.1 Specific ES-HDS tools

In the results list, three more tools are available for each record, if the user has the necessary rights.

View the object in the tree

Manage rights

Put the object in a folder

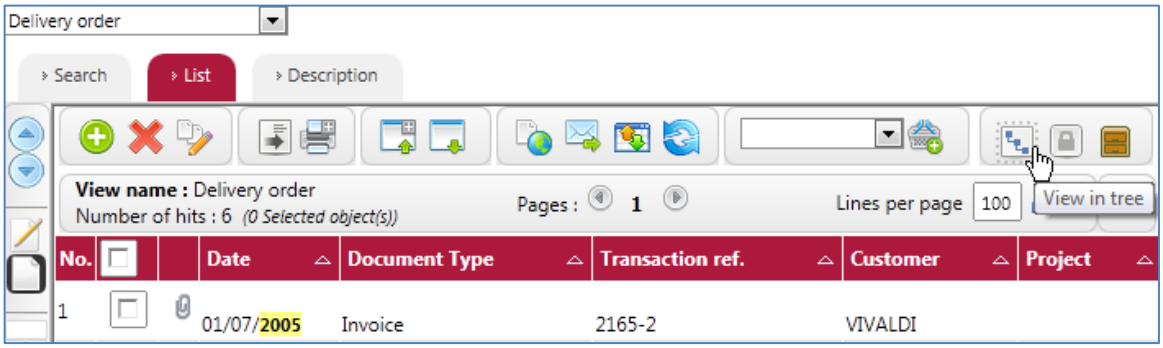


Figure 57: Tools available when viewing a results list

View the object in the tree

Select the object from the list and click on the icon **[**View in tree**]** in the toolbar.

This lets you view an item which has already been filed in the tree. The tree is deployed down to a selected item starting from a selected folder type. It is possible to type a folder. By default, the tree is deployed starting from its root.

In our example above, the item belongs to the "VIVALDI" folder, in the 2165-2 > exchanges, minutes >Delivery orders subfolder:

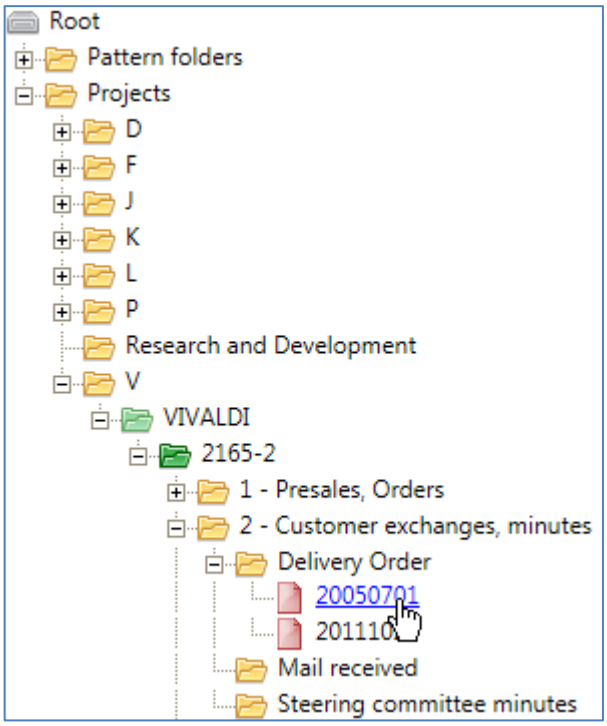


Figure 58: Document displayed in its hierarchy context

Manage rights

Select the object from the list and click on the icon [Rights] **in the toolbar**.

This lets you manage rights on the object. This is done case by case.

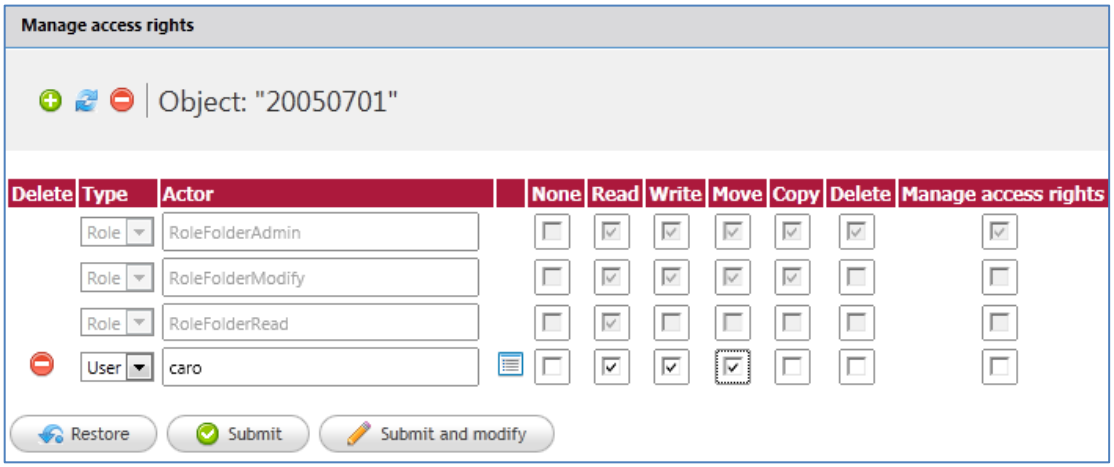


Figure 59: Managing rights

Add a right

Click on the icon [Add] to add an extra line to the rights table. Select whether to configure rights for a user or a role. Using the icon on the right of the **Actor** field, choose an actor.

Check the boxes corresponding to the rights you wish to assign to the selected actor.

- **Read:** Right to delete the object
- **Write:** Right to modify the object 's attributes
- **Move:** Right to move the object in the tree view
- **Copy:** Right to copy the object
- **Delete:** Right to delete the object
- **Manage access rights:** Right to manage rights on the object

Note:

- Double-click to select all the rights.
- To deselect everything, click on **None** or uncheck **Read**.

Delete rights for a user or a role

Click on the icon [Clear] next to the right you wish to remove.

Delete all rights

Click on the [Clear] icon to remove all rights.

Validation

For all changes to be applied, validate using the [Submit + Modify] button (returns to the rights management screen) or [Submit](closes the window), under the rights table.

File in the tree

Select the object from the list and click on the  icon [Put object in folder] in the toolbar. This lets you file an object in the tree, if it has not been automatically filed using the rules associated with the profile.

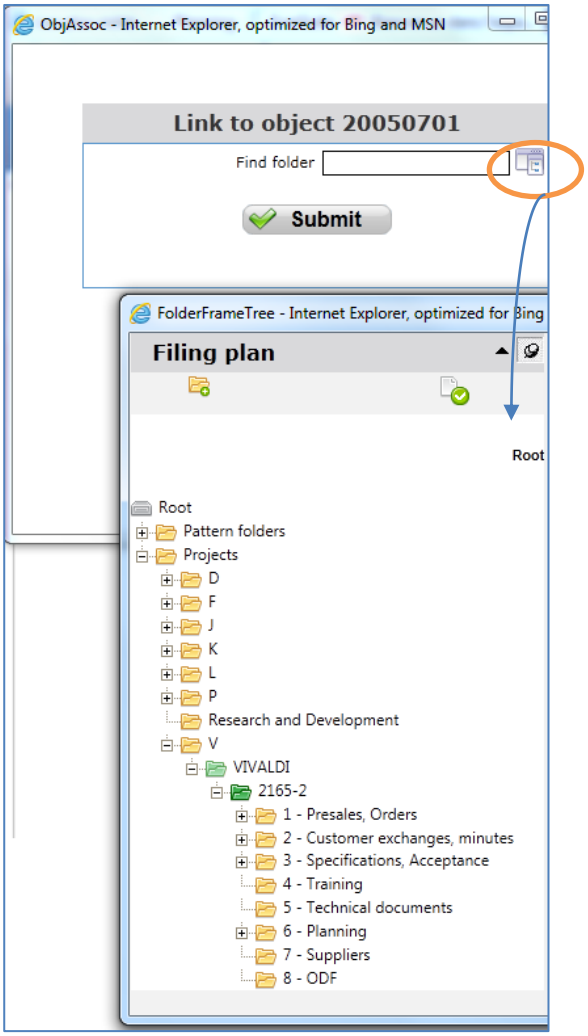


Figure 60: Filing an item manually

Enter a folder name or select the folder from the tree using the icon to the right of the edit box. Click on the [Submit] button.

If there is a subfolder with a default association with this record type, then the document will be automatically filed in this subfolder. Otherwise, the document will be filed directly into the selected folder.

Deleting an object

This action is for deleting an object from the current table.

Select the objects which you wish to delete and click on the icon [Delete] in the toolbar.

Thanks to the associated profile, the deleted object is removed from the tree and the associated rights are deleted.

4.2.2 Modify an object

To modify an object, expand the tree and click on the object. The record is displayed on the right. Use the icon to go into update mode.

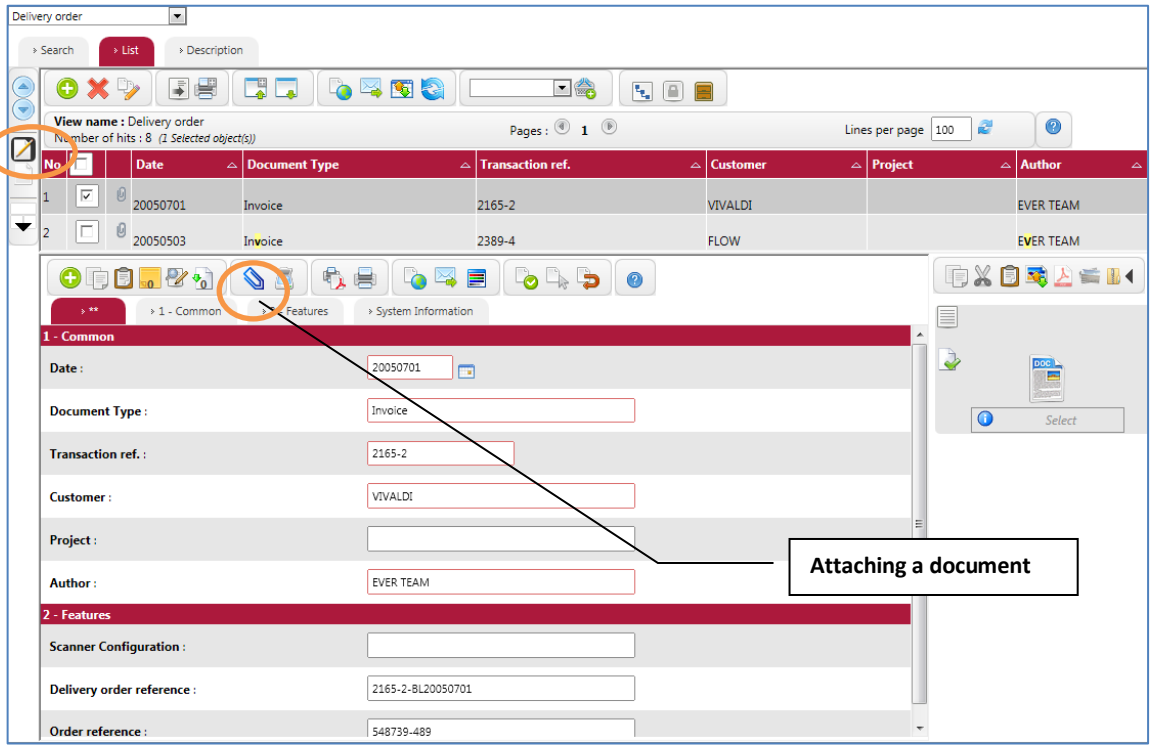


Figure 61: Updating a record

The View/Update screen, corresponding to the table declaration in EverSuite, is displayed in place of the object list. You can attach documents in this mode.

Update the fields as required and submit your changes, using the icons on the top right of the input form:

4.2.3 Create a new object after doing a search

You can also create a new object, starting from a search. The profile chosen when starting the search is used to type the new record automatically (e.g. delivery order).

⇨ Click on the icon [Add]:

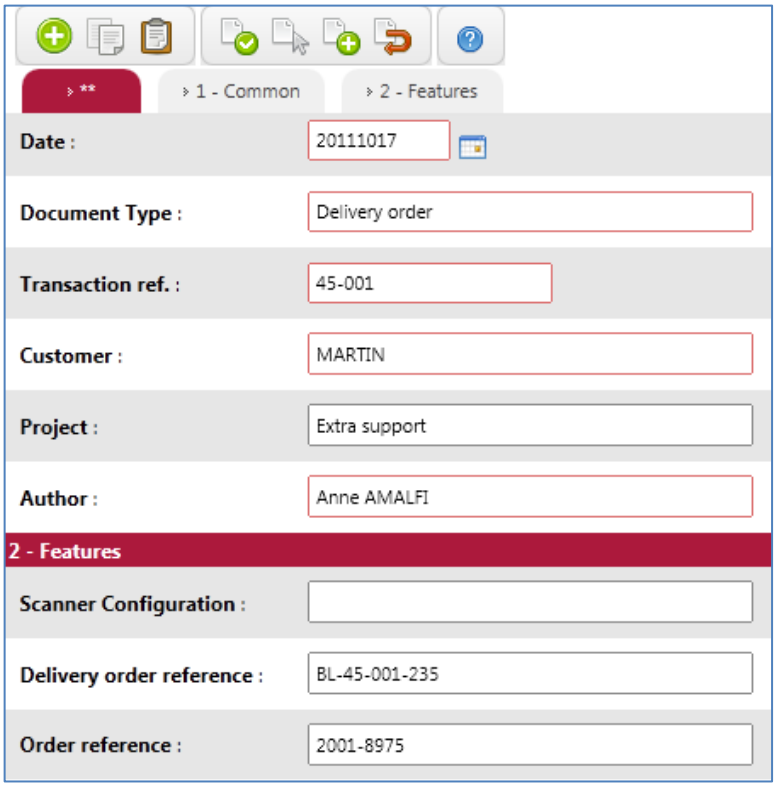


Figure 62: Input form

The input screen, corresponding to the table declaration in EverSuite, is displayed in place of the object list. Fill out the necessary fields and validate, using the buttons on the top right of the form.

Reference

This is the standard EverSuite document management screen. For more information, please refer to the CORE Administration – EverSuite Interface guide.

4.2.4 Scan

Click on the icon [Scan] above the View/Update screen.

Reference

This is the standard ES-SCP scanning screen. Please refer to this service's documentation for information on how to configure and use it.

4.2.5 Annotate

Click on the icon [Annotations] above the View/Update screen.

Reference

This is the standard EverSuite annotations screen. For more information, please refer to the EverSuite ES-RAS Annotation management guide.

4.3 MANAGING THE ES-HDS TREE

In this chapter, we cover different aspects of tree management, which is a task for you application's administrator. We will present different ways of building and accessing a filing plan.

The behavior of any of these screens may be modified by configuring the interface as described in the Configuration chapter.

4.3.1 Accessing the filing plan

The filing plan is accessed using the  menu [Filing plan].

The window has two sections:

- an area for the tree
- an area for showing different views

Selecting from the tree:

- To select a folder or an object, click on the small folder or object icon displayed in the tree.
- To consult a folder or an object, click on the name of the folder or the object. The folder or object is automatically selected.
- To expand and collapse part of the tree, click on the "+" and "-" symbols.

Information
Depending on how it has been configured, the objects may not appear in the tree. It is possible to display folders only or all the objects.

The tree is displayed on the left like this. It may be hidden using the small black arrow, on the top right.

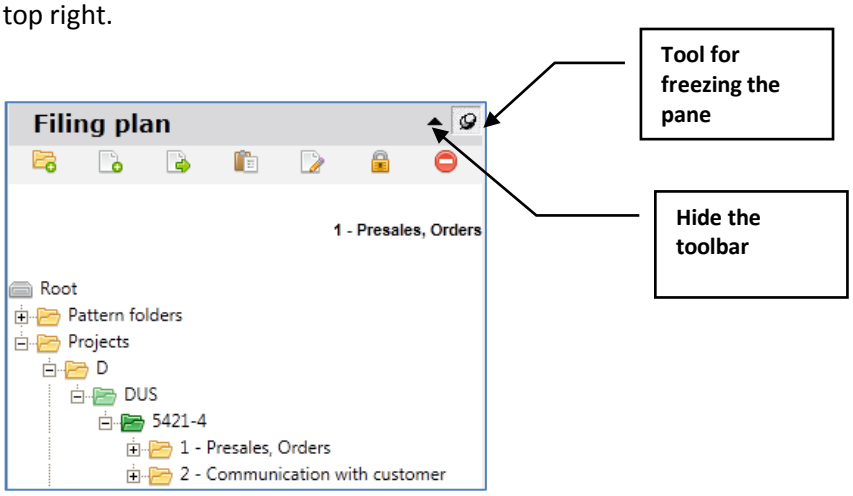


Figure 63: At the root of the filing plan

The  icon activates a mode which can hide the tree to suit viewing needs. Then you just have to click on the bar on the left of the tree to hide or show the tree.

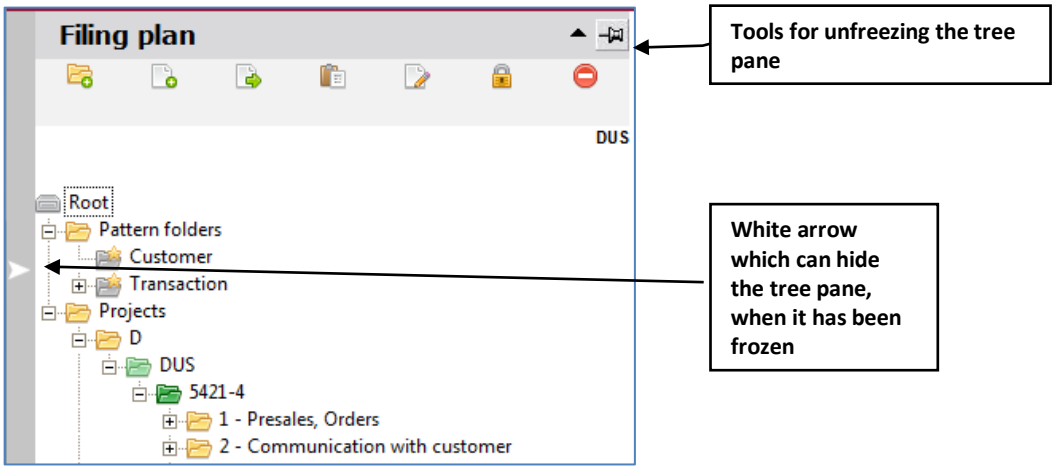


Figure 64: Filing plan, with tree pane frozen

Information on parameters

To configure folder display: hdsNodeSortArg, hdsNodeSortAsc, hdsObjSortArg, hdsObjSortAsc,

4.3.2 Characteristics of a folder

A folder is defined by invariable **system information** and by **specific attributes** defined by the project's functional administrator, related to ES-HDS.

System Information

Identifier

The identifier is a unique numeric value, set by the database. It is declared as the counter in EverSuite.

Name

The folder name is the name which is displayed in the tree and which enables the user to navigate in the tree. It is not necessarily unique.

Folder profile

The folder profile is only used for an item with a `Folder` profile. It makes it possible to distinguish between different folders. It defines the current folder. This type makes it possible to restrict searches or to limit the tree display.

If a `Folder` item's structure is described by a particular table (e.g. **TFOLD_CUST** for the Customer folder, in our example), then this introduces the notion of specific attributes for this folder. In fact, the data in this table will describe the folder, which is then said to be a "Specialized folder".

Object profile

An object profile is only used for an item with a *Object* **or** *Group* profile. An object profile is what makes it possible to file objects in the tree automatically. It defines the types of item that the current folder may contain.

When the user selects a destination folder for an object, if the folder or the subfolder has the object's profile, it will be filed in this folder. If several folders have these characteristics, then the same object will be referenced several times in each of these folders.

The "Group" profile type is for filing objects with different structures in the same folder automatically.

Information
The Folder profile and Object profile system information fields are mutually exclusive.

Pattern folder

The pattern folder concept means you can mark a folder hierarchy as a folder template. These folders are managed by a functional administrator. When the template is duplicated, all the folders in this template, along with their characteristics and rights are duplicated.

One can, for example, define a filing template for sales folders. For each new sale, this template is duplicated. The newly created sales folder can be updated and consulted by users depending on their permissions.

Specific attributes

The specific attributes correspond to the fields in the table assigned to the folder via its profile.

4.3.3 Building the tree

The tree is made up of folders, subfolders and objects. These objects correspond to records in the data tables which you wish to use in the filing plan.

The tree is built when:

- building **pattern folders**, when setting up the application. These folders serve as **templates** for generating folders, for filing objects as they are created.
- **building automatically** by applying filing rules.
- making **manual ad hoc changes** to the current tree.

Pattern folders

Pattern folders, or template folders, are built step by step in order to describe all possible folders and subfolders and build up a template tree.

Add a folder

- Select the folder to which you wish to add a subfolder.

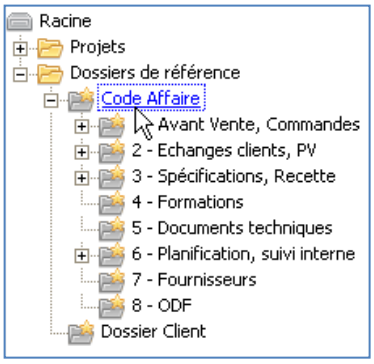


Figure 65: Selecting a folder in the tree

- Click on the icon [Add a folder] in the toolbar. The following screen appears on the right:

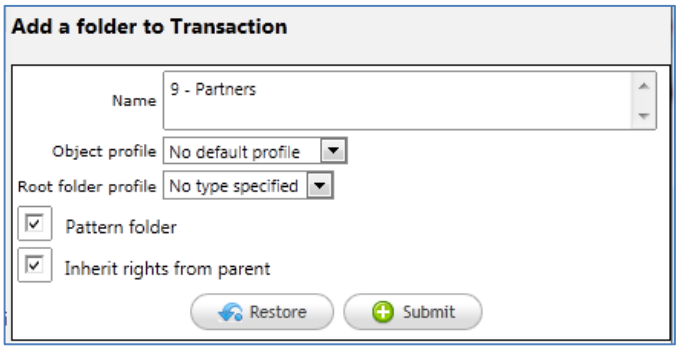


Figure 66: Adding a folder

- Enter a name for your folder, select its profile if you wish to give this folder specific attributes (see "Specific attributes").
- Select an object profile you wish to file in this folder by default.
- If you are building a template folder, check the **Pattern folder** box. If the parent folder is a pattern folder, the box is checked automatically. A template folder in the tree can be distinguished from the others because it is displayed with a icon.
- The **Inherit rights from parent** box enables rights defined for the parent folder to be inherited automatically.
- Validate your input by clicking on the [Submit] button. A message confirms that the folder has been created:

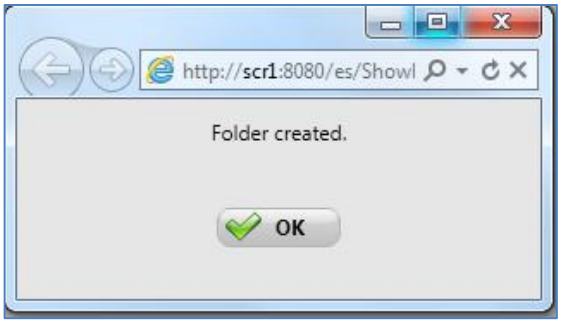


Figure 67: Message confirming the folder has been created

- The folder appears in the tree view if the parent folder is open. Otherwise, if it is the first subfolder, a "+" appears to the left of the parent folder's icon.

In our example we are building a "Case code" pattern folder with a subfolder, "9 - Partners" which itself contains the subfolders, "Specifications, Prototypes" and "On-site services".
The "Partners" and "Specifications, Prototypes" are not typed, while the "On-site services" folder takes by default documents of type "Technical support report".

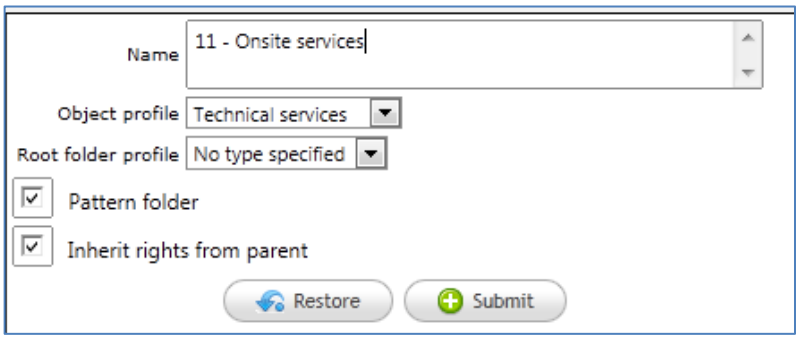


Figure 68: Specifying the type of document the folder contains

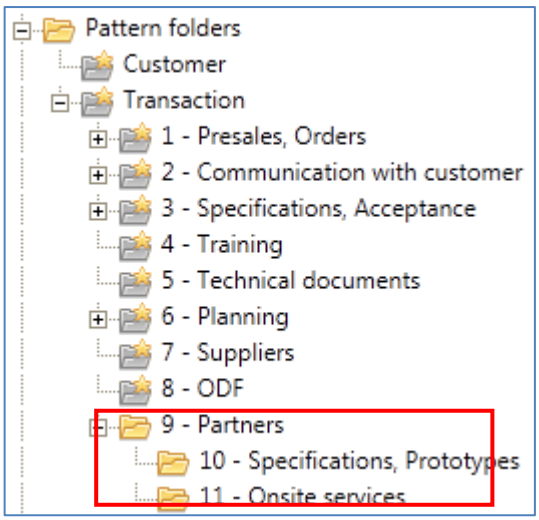


Figure 69: Building pattern folders

Delete a folder

- Select the folder which you wish to delete, e.g. the "Specifications, Prototypes" folder.
- Click on the icon [Delete] in the toolbar. Confirm deletion by clicking on the [OK] or cancel by clicking on [Cancel].

If it is a shared folder, the folder will not be deleted, but it will no longer appear in the folder in which it was shared.

Modify a folder

- Select the folder which you wish to update.
- Click on the icon [Modify] and [Modify system information] in the folder attribute toolbar (on the right).

The update form is similar to the one above, except possibly for the check boxes. If it is a folder created from a pattern folder, there is only one check box: Autonomous Folder. This is for indicating whether the folder inherits rights from the pattern folder (unchecked) or not (checked). See the paragraph below on the system parameter, **RightNodeRef**.

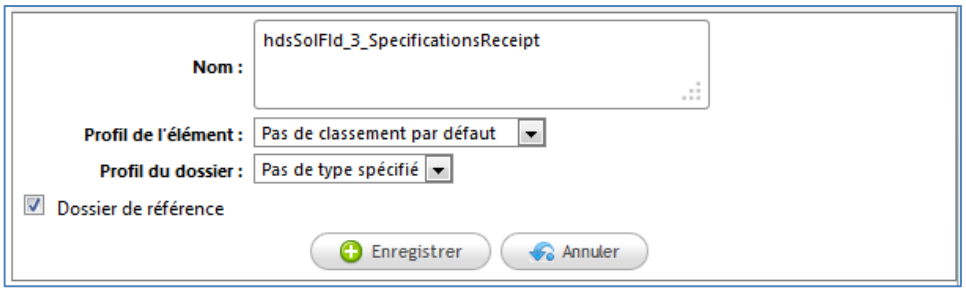


Figure 70: Updating a folder created from a pattern folder

Copy a folder

- Select the folder which you wish to duplicate or share.
- Click on the icon [Copy]in the toolbar: the"Copy mode" toolbar appears below the general tree toolbar. From there you can duplicate and share.

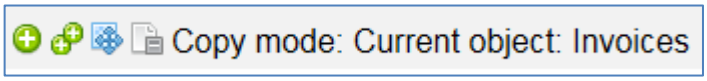


Figure 71: "Copy mode" toolbar

Duplicate a folder

- Select the target folder.
- Click on the icon [Add a folder structure]in the "Copy mode" toolbar.
- If necessary, correct the name of the folder and click on the [Save] button. The new folder appears in the tree.

Caution
When creating a new folder via "Copy mode", the new folder (the copy) gets the current definition of the pattern folder(latest update) while the original folder (copied folder) retains the pattern which was in place when it was created.

Example: Folder "3 - Specifications, Acceptance" to be duplicated in the Partners folder:

- Click on folder "3 - Specifications, Acceptance" (folder to be copied).
- Click on the icon [Copy].
- Click on folder "Partners" (target folder).
- Click on the icon.
- Modify the name of the "Specifications, Acceptance" folder:

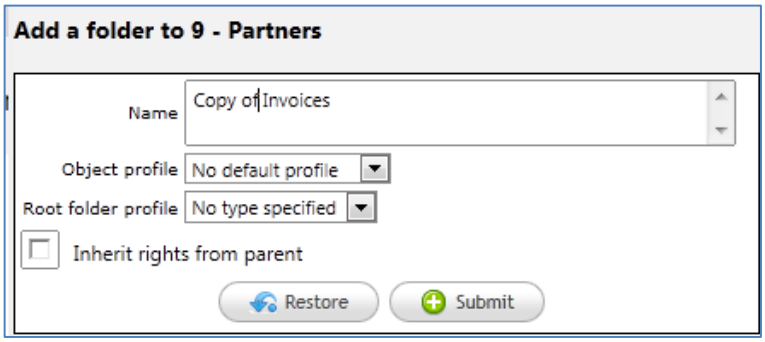


Figure 72: Duplicating a folder

- Click on the [Save] button.

The folder and its subfolders are copied. However, they are not declared as "pattern folders". You can modify this option if you wish.

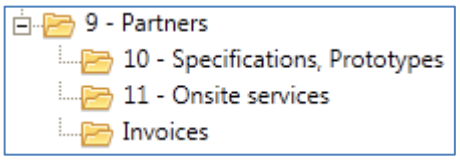


Figure 73: Copying folders

All the rights defined on the "3 - Specifications, Acceptance" folder and its subfolders are also created on the Specifications, Acceptance" folder and its subfolders.

Share a structure

- Select the folder where the folder will be shared.
- Click on the icon [Share a folder structure] in the "Copy mode" toolbar.
- You can also share a folder by dragging and dropping it to another one while holding down the Ctrl key.

The shared folder is still present in its original folder and also appears in the selected folder. Any changes made in the original folder will automatically appear in the shared folder.

The shared folder is displayed differently in the tree view, as a folder held in a hand. It is the same folder referenced in two different places.

In our example, we want to share the "Minutes" folder from the "JAYANA-JA056" customer folder with the "DUS-5421" customer folder. The procedure is as follows:

- Click on the "Minutes" folder (folder to be shared) for customer "JAYANA >JA056".
- Click on the icon [Copy].
- Click on the "Comunication…" case folder for customer "DUS – 5421-4" (target folder).
- Click on the button [Share a file structure].

A new "Minutes" folder is added to the specifications folder for the DUS customer, with a special icon:

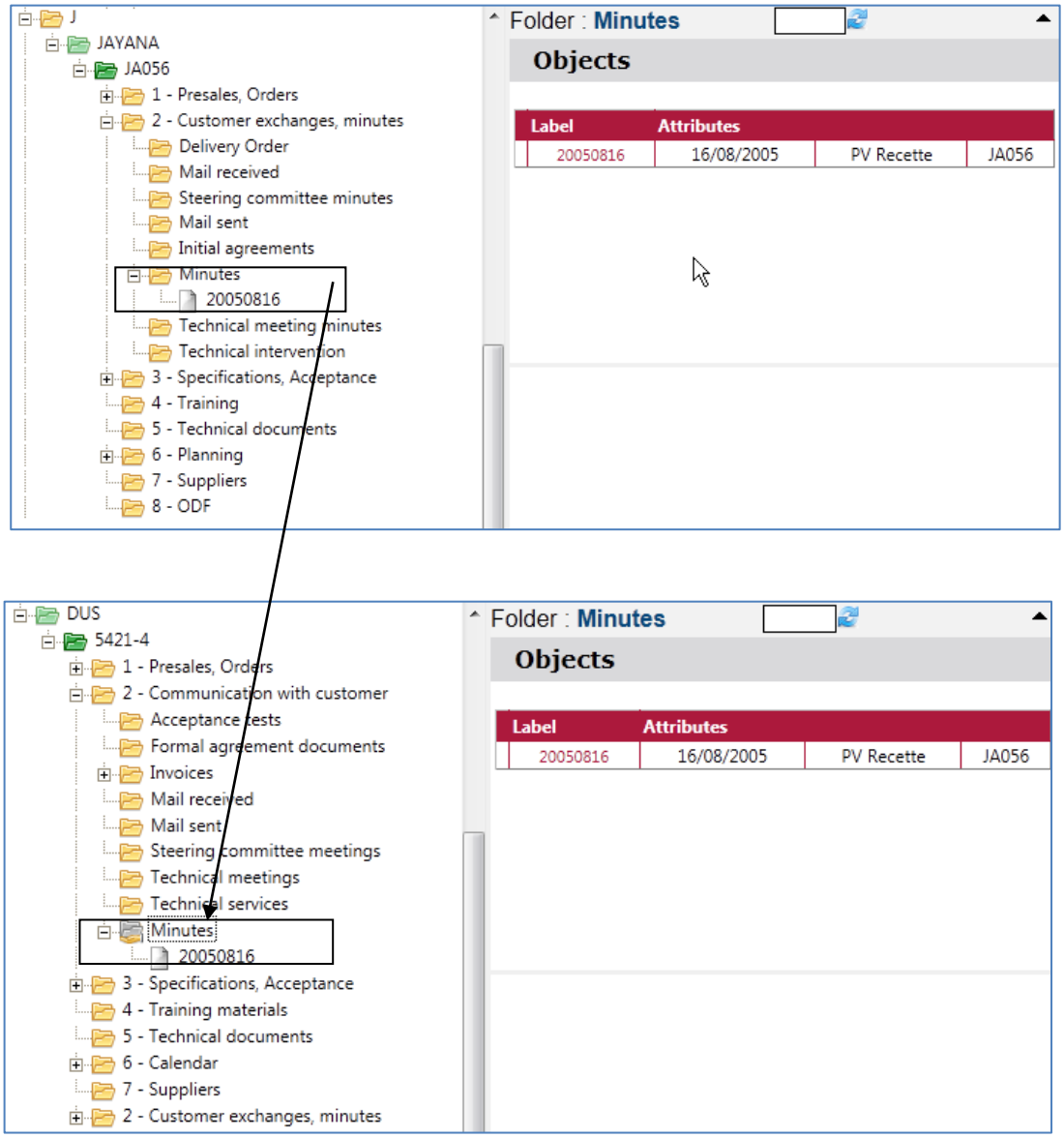


Figure 74: Sharing a folder

Move a folder

- Select the folder where the folder will be moved to.
- Click on the icon [Move folder] in the "Copy mode" toolbar.

Leave copy mode

Click on the icon [Delete copy] in the "Copy mode" toolbar.

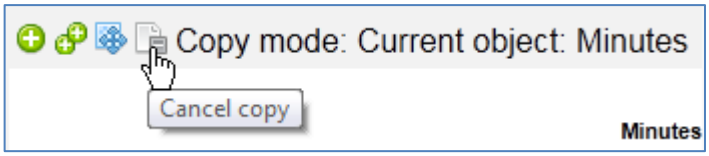


Figure 75: Leaving copy mode

4.3.4 Managing objects in the tree

An object is a record in a data table declared in EverSuite. The object's attributes correspond to fields in the table (metadata).

Associate an existing object

- Select the folder to which you wish to add an object already created in the table.

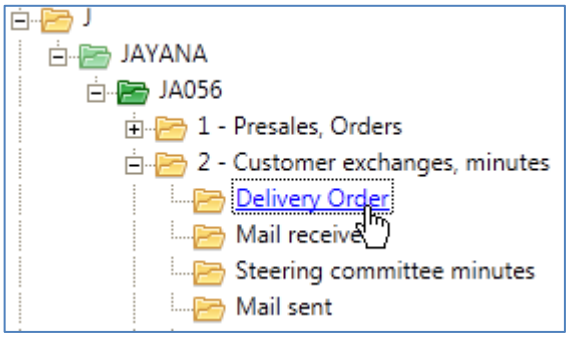


Figure 76: Selecting the folder to add an existing object to

- Click on the icon [Link to an existing object] in the toolbar. A dropdown list of document profiles appears on the right:
- Select a document profile.

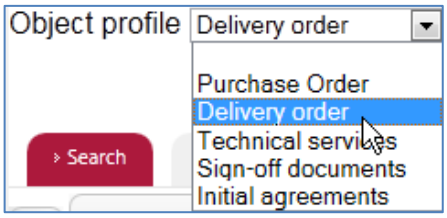


Figure 77: List of object profiles

- The search form for the related data table is displayed:

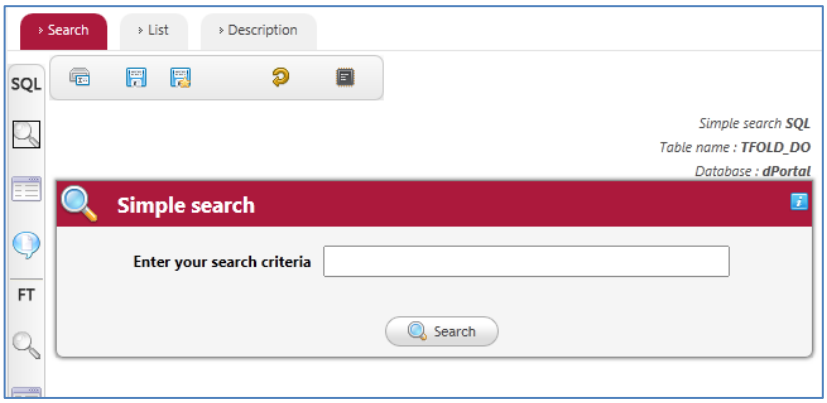


Figure 78: Search form

ES-HDS displays the results list:

No.			Date	Document Type	Transaction ref.	Customer	Project	Author
1			20050427	Invoice	5421-4	DUS	SCR	EVER TEAM

Figure 79: Profile results list

- Select the object(s)to link (check box)
- Click on the icon [Associate selected objects].

The new object is now filed:

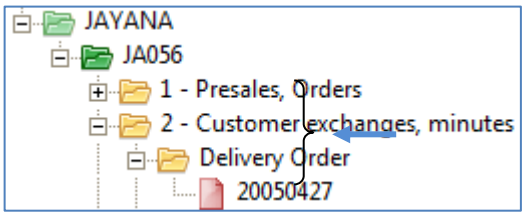


Figure 80: Filing an object in the folder

Create an object

- Select the folder to which you wish to add an object.

Figure 81: Selecting the folder to add an item to

- Click on the icon [Add an object] in the toolbar. A dropdown list of document profiles appears on the right:
- Select a document profile.
- The input form is displayed:

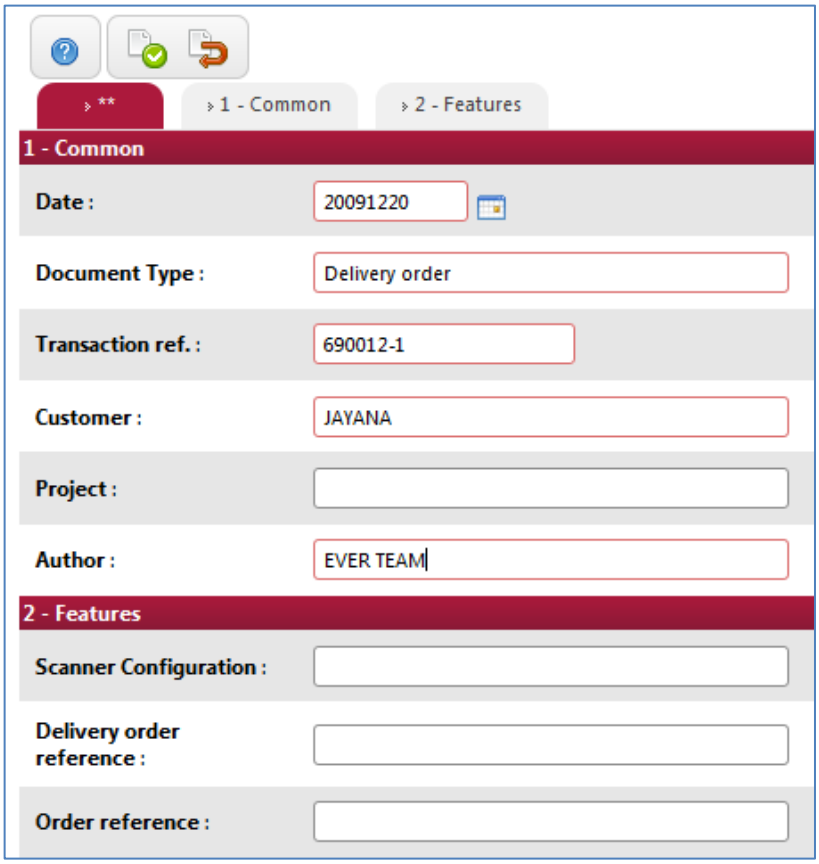


Figure 82: Entering a new object in a folder

- Validate the input then click on [Add] to add it to the folder.

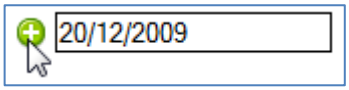


Figure 83: Saving a new object

The new object is automatically associated with the current folder:

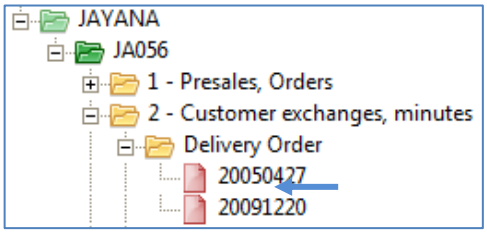


Figure 84: New object added to the current folder

Detach an object

- Select the object you wish to detach.
- Click on the button [**Detach**] in the toolbar. Confirm breaking the link with this item by clicking on the [OK] button or cancel by clicking on the [Cancel] button.

Copy an object

- Select the items which you wish to duplicate or share and click on the icon [Copy] in the toolbar.

Figure 85: Tools for sharing or copying the object

This "Copy mode" toolbar appears below the general tree view toolbar.

Duplicate an object

Select the destination folder and click on the icon [Add copy of this object] in the "Copy mode" toolbar.

The steps to follow are the same as for creating an object except that the input screen is already filled out with the values of the copied object.

In our example, we have decided to make a copy of the "20070112" delivery order in the Minutes folder. We can also see that the document added is still displayed in its original folder:

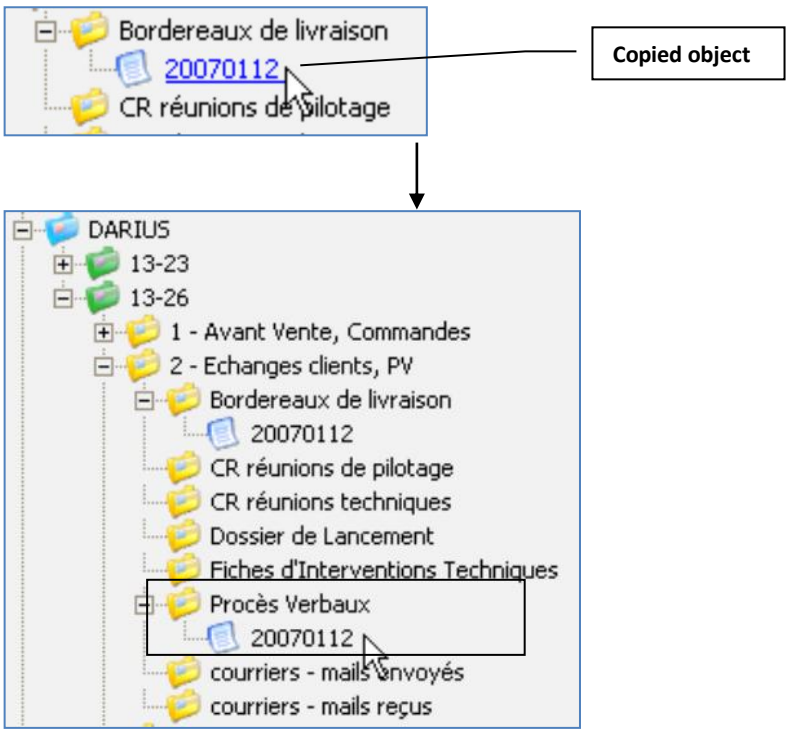


Figure 86: Copying an object to another folder

Share an object

- Select the folder where the copied item will be shared and click on the icon [Share object] in the "Copy mode" toolbar.
- A confirmation field appears with the name of the object: Click on to share it:

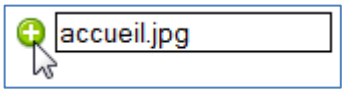


Figure 87: Validation box

The shared object is still present in its original folder and also appears in the selected folder. It is the same object referenced in two different places. It may however have a different link name.

Move an object

- Select the folder where the copied item will be moved and click on the icon [Move object] in the "Copy mode" toolbar.

The object is no longer at its original location: it is now in the selected folder.

Leave copy mode

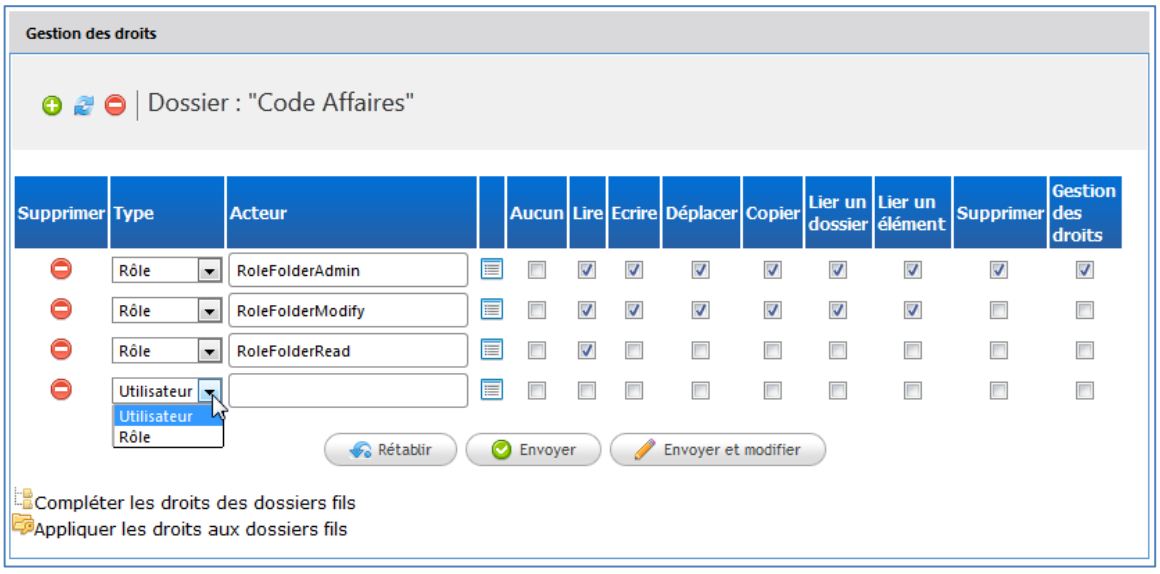
Click on the icon [Delete copy] in the "Copy mode" toolbar.

Information on parameters

To configure viewing objects: hdsDispElt, hdsModeShowObj, hdsDisplayFirstDoc, hdsAllowDisplayDoc, hdsShowObjDoc, hdsModeShortLabel, hdsMaxLghtName, hdsTreeCountPg.

4.3.5 Managing folder rights

- Select the folder for which you wish to manage the rights and click on the icon [Rights] in the toolbar:



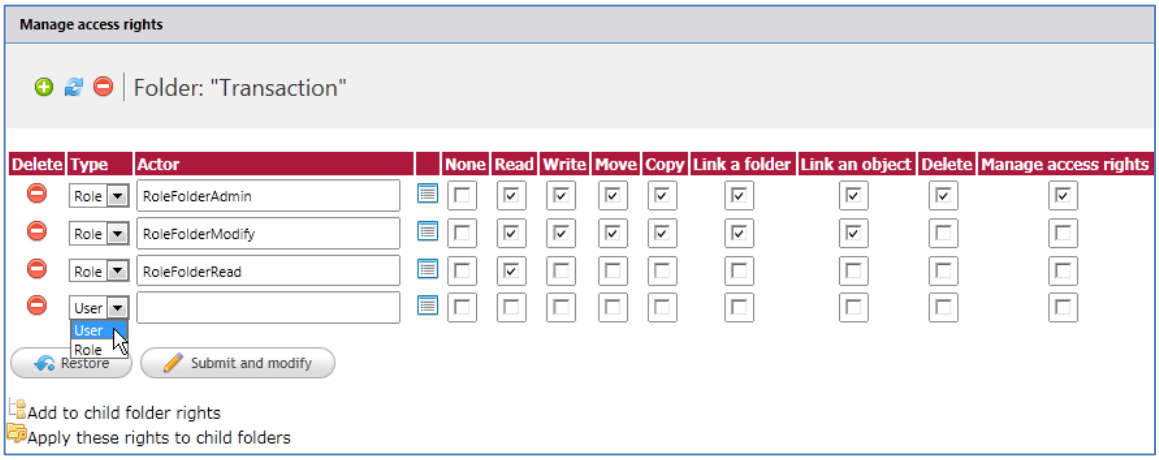


Figure 88: Managing rights

Add a right

Click on the icon [Add] to add an extra line to the rights table. Select whether to configure rights for a user or a role in the **Type** column.

Using the icon [List], on the right of the **Actor** field, choose an actor.

Check the boxes corresponding to the rights you wish to assign to the selected actor.

- **Read:** Right to read the folder
- **Write:** Right to modify the folder's attributes
- **Move:** Right to move the folder in the tree view
- **Copy:** Right to copy the folder
- **Link a folder**: Right to add a folder
- **Link an object**: Right to add an object
- **Delete:** Right to delete the folder
- **Manage access rights:** Right to manage rights on the folder

Double-click to select all the rights.

To deselect everything, click on *None* or uncheck *Read*.

Delete a right

- Click on the icon [Delete] in the line of rights you wish to remove.

Delete all rights

- Click on the [Clear] icon in the toolbar to remove all rights.

Validate

For all changes to be applied, validate using the button [Submit and modify], under the rights table.

Two extra options are presented:

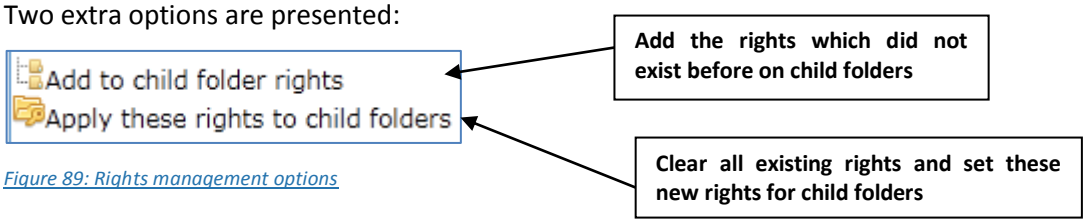


Figure 89: Rights management options

4.3.6 View management (right pane)

In this chapter we describe the different areas for viewing information on folders and objects.

Folder content

Click on the folder name in the tree view. If the folder contains objects, they are listed in a table. If not this table will be hidden so as not to overload the viewing area.

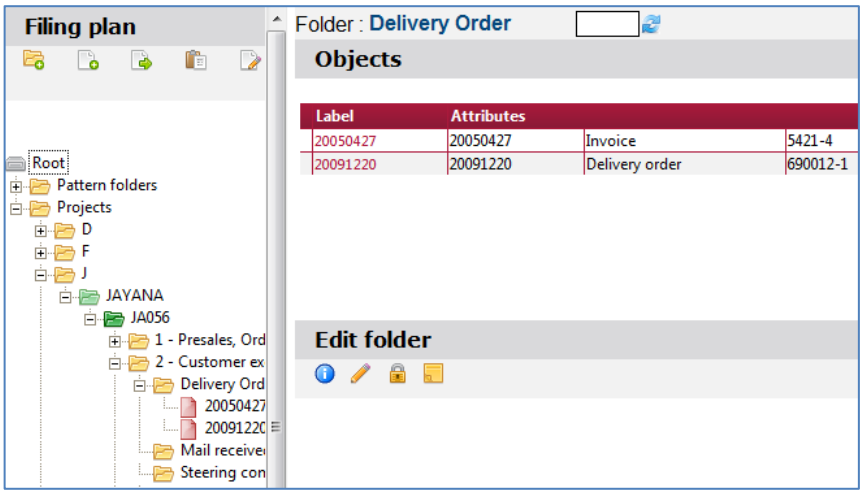


Figure 90: Contents of the "Delivery orders" folder

The ▲ and ▼ buttons (on the extreme right) let you show or hide screen areas or toolbars.

A click on the link containing the folder name at the top of the right hand part of the window refreshes the display of the folder.

Object list

The list of objects in the folder is presented in table form. This table always contains, in the first column, the item names or labels. The other columns contain the first fields making up the minimum view configured in the EverSuite table declaration. There are never more than three fields displayed whatever profile the objects are in.

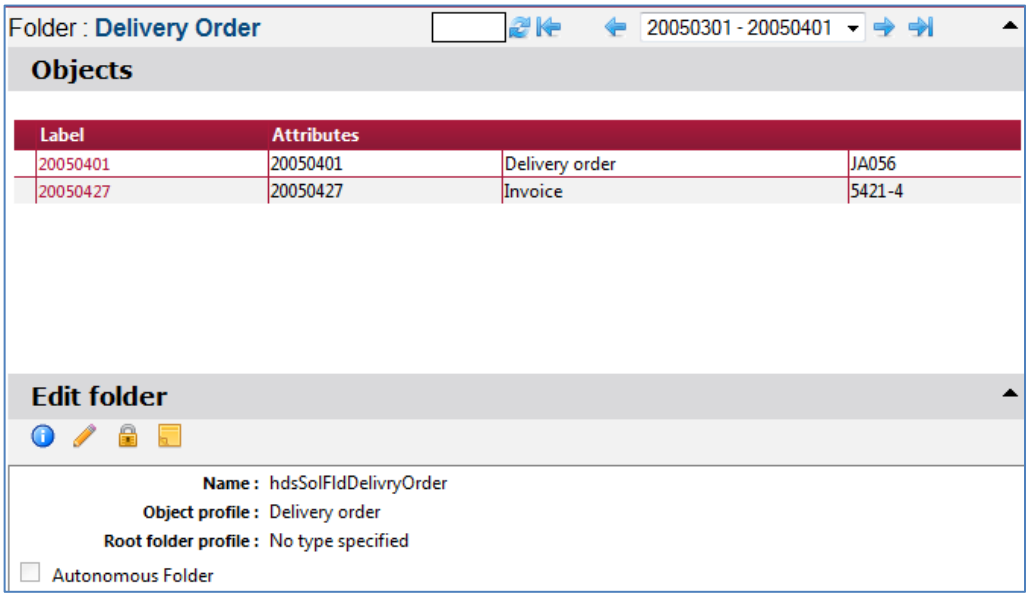


Figure 91: Viewing a folder

- Click on the label of the object you wish to view or update.

If the number of objects in the folder exceeds the pagination limit, you can use the drop-down list or the buttons (First page), (Previous page), (Next page) and (Last page) to move between pages.

Note: Caution, the number of objects displayed per page will depend on the rights defined on each object.

Information on parameters

To configure item display:

hdsfieldList, hdsListSize, hdsCountPg, hdsModePg.

Management tools for a folder

The folder toolbar depends on the folder's profile.

Thus, in our example, the customer folders (blue) are linked to the "Customer folder" profile, and refer to the customer table.

The case code folders (green) are linked to the "Business Folder" profile, but do not refer to any table.

If the **folder is not typed** or its profile does not refer to a SQL table (no specific attributes), the toolbar will be reduced to:

Figure 92: Tools for a non-specialized folder

In our example, this is the case for folders like:

- "Delivery orders" which contains a document Profil, but has no folder profile.

- "Business Folder" whose label is the Case code, which is a "node" in the tree, and contains all the subfolders, described by the templates, but does not refer to a table.

If the **folder is typed** and **has a SQL table** (specific attributes), the toolbar looks like this:

Figure 93: Tools for a specialized folder

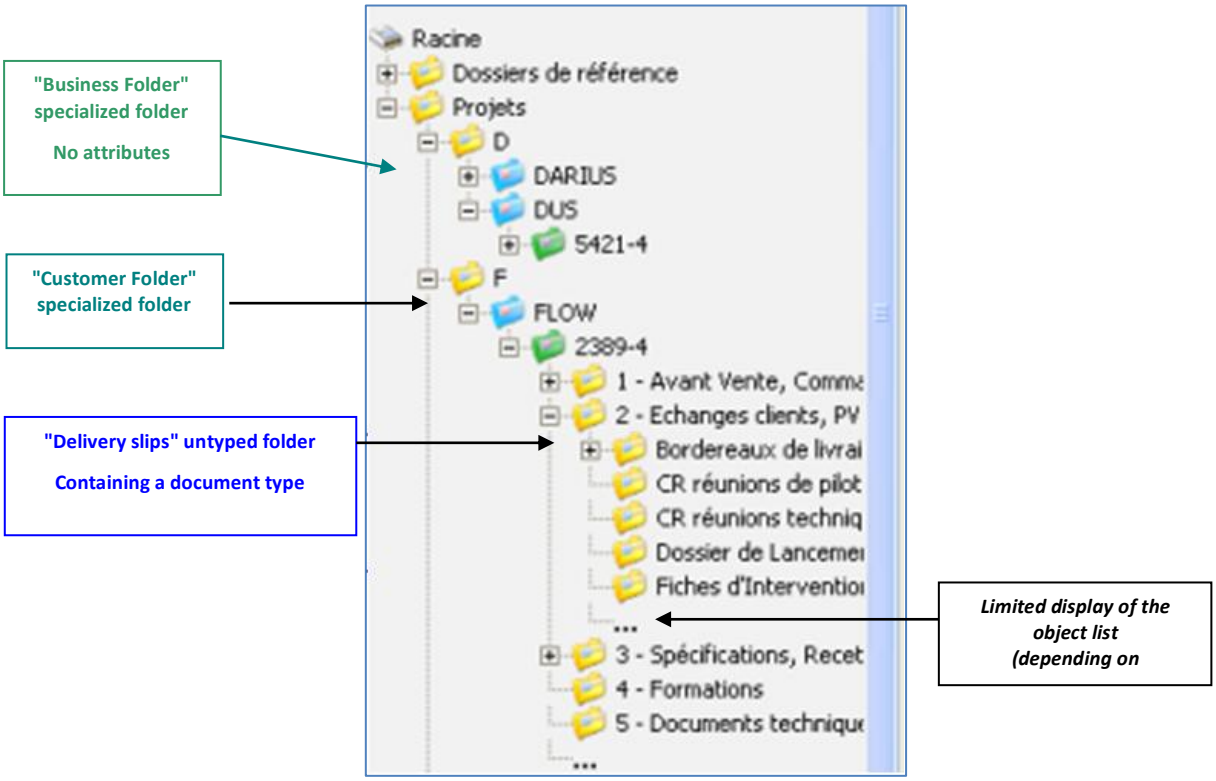


Figure 94: Display of attributes of a specialized folder

Information on parameters

To configure item display in a folder: hdsTreeCountPg, hdsMaxLgthName, hdsModeShortLabel,

View system information

- Click on the icon [View system information].

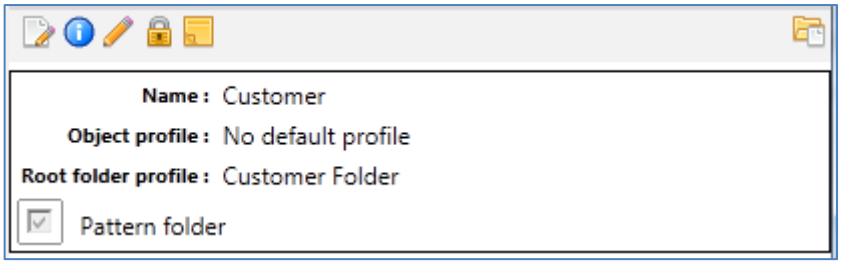


Figure 95: Viewing system information

Modify system information

- Click on the icon [Modify system information].

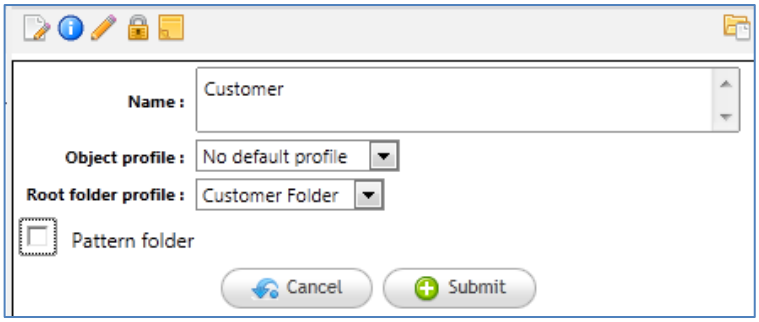


Figure 96: Modifying system information

Modify the folder's attributes and click on the button [Save] to validate your changes.

Note: If specific attributes have been entered, it is no longer possible to changer the folder type.

List documents

For a specialized folder, you can bring up the list of all the documents in this folder and its subfolders. You can display the tree view and the documents, or only the documents.

The icon [All documents], on the far right of the window, opens a new window, with the icon [Print batch] at the top on the left. It prints the list of the documents displayed.

For example the display of documents in the "VIVALDI" folder:

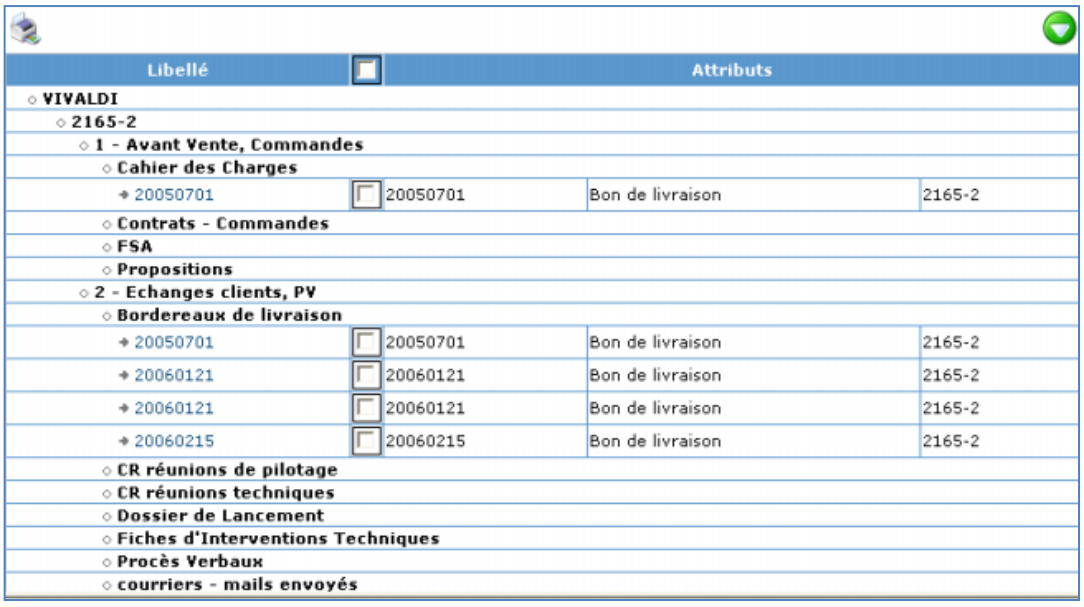


Figure 97: Displaying the contents of a folder

The button [Show/hide folders] lets you display only the documents.

Libellé		Attributs		
20050701		20050701	Bon de livraison	2165-2
20050701		20050701	Bon de livraison	2165-2
20060121		20060121	Bon de livraison	2165-2
20060121		20060121	Bon de livraison	2165-2
20060215		20060215	Bon de livraison	2165-2
2006		2006	PV Recette	2165-2
20060121		20060121	Bon de livraison	2165-2
20060318		20060318	Bon de livraison	558872
20060320		20060320	Bon de livraison	558872
20060320		20060320	Bon de livraison	558872
20050701		20050701	Bon de livraison	2165-2

Figure 98: Displaying the contents of a folder - documents only

Create specific attributes

- Click on the icon [Create/modify attributes]: Make the necessary changes and use the icon [Save] to confirm them. The attributes are displayed again in update mode and the toolbar is updated.

View specific attributes

- Click on the icon [View attributes].

Modify specific attributes

- Click on the icon [Create/modify attributes]. Make your changes and use the icon [Submit] to confirm them.

Manage folder rights

Click on the icon [Rights]. A new window opens for configuring folder rights. The screen is the same as the one described in the "Managing folder rights" paragraph.

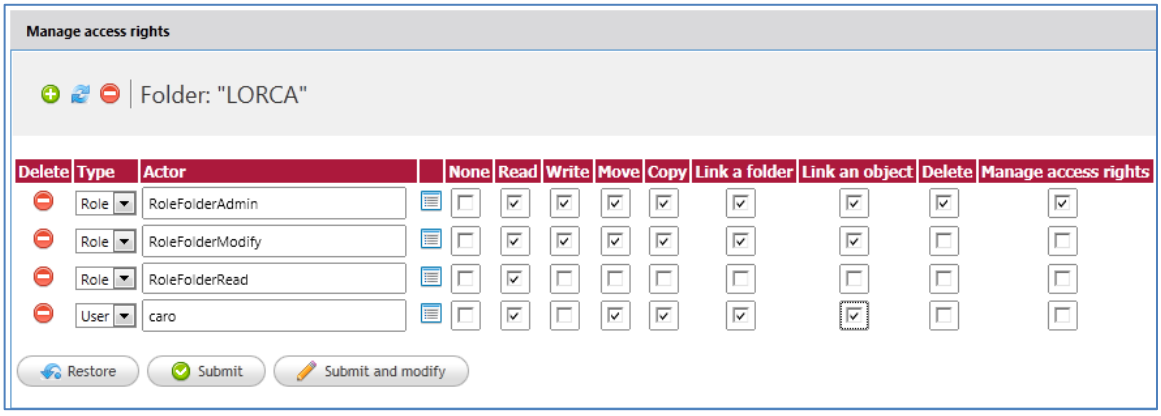


Figure 99: Managing rights for the folder

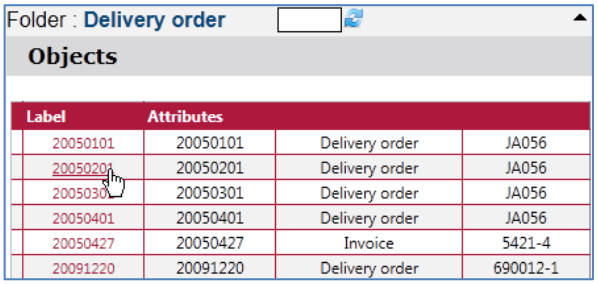
Annotate

Click on the icon [Annotations].

Reference
For more information, please refer to the CORE Administration – EverSuite Interface guide.

Object contents

- Click in the object table on the link for the item you wish to view (**Label** column).


Folder : Delivery order

Objects

Label	Attributes		
20050101	20050101	Delivery order	JA056
20050201	20050201	Delivery order	JA056
20050301	20050301	Delivery order	JA056
20050401	20050401	Delivery order	JA056
20050427	20050427	Invoice	5421-4
20091220	20091220	Delivery order	690012-1

Figure 100: Selecting an object with its label

A new toolbar, whose contents vary depending on the file format, is displayed for manipulating the item:

Figure 101: Toolbar for an object

- View, update and copy metadata
- Attaching a document
- Scan
- Manage object rights
- Detach
- Manage annotations

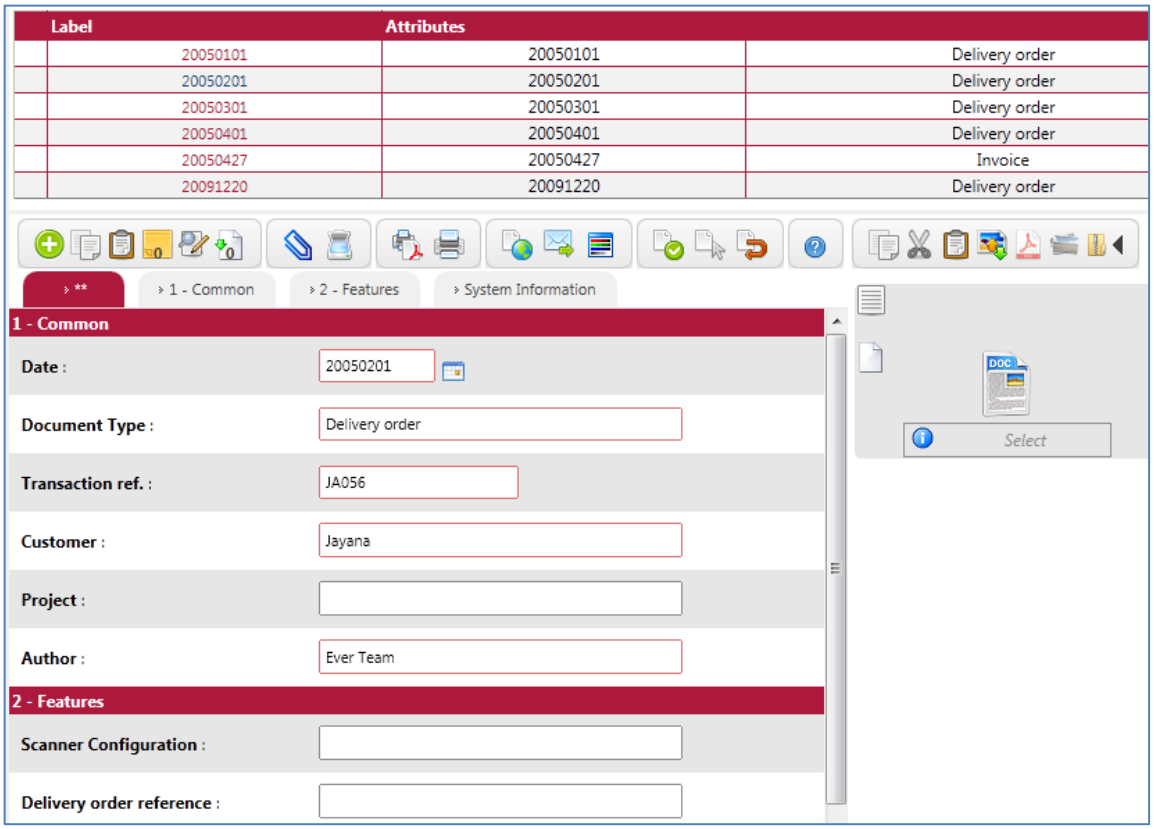


Figure 102: Processing objects

List documents

The list of an object's attached documents appears in read-only mode under the toolbar. This list can be managed in update mode. The name of the link between folder and object can be changed.

Manage versions

A special configuration gives you an extra toolbar, in update mode, which enables you to manage any changes in the attached documents:

The icon [Delete] allows you to delete the attached document.

The icon [Lock] locks the document to protect it temporarily.

The icon [Set as final version] prevents any further changes.

View history

The icon [History] displays the document's change history:

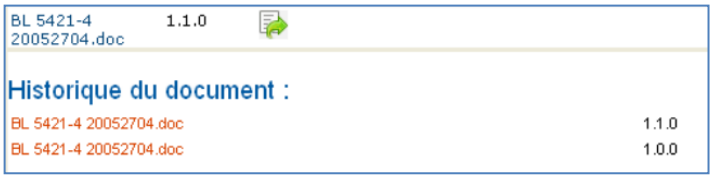


Figure 103: Viewing a document's history

View attributes

Click on the icon.

Modify attributes

Click on the icon [Update], make your changes and save them using the icons in the toolbar:

Figure 104: Validation icons

- [Submit]: Validate without refreshing the display
- [Submit + Modify]: Validate and refresh the display
- [Restore]: Cancel your changes.

Attach documents

Click on the icon [Attach a document]:

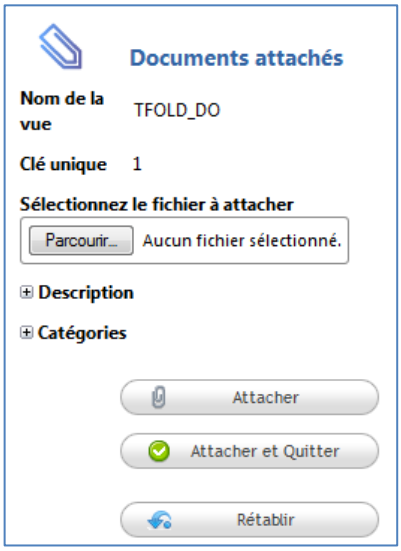


Figure 105: Attaching documents

This is the standard EverSuite document management screen. For more information, please refer to the CORE Administration – EverSuite Interface guide.

Scan

Click on the icon [Scan].

This is the standard ES-SCU scanning screen. For more information, refer to the ES-SCU – Individual document scanning guide.

Copy

Click on the icon [Copy] in the filing plan toolbar and refer to the "Copy an object" paragraph.

Manage rights

Click on the icon [Rights] to open a new window. The screen is the same as the one described in the Manage" paragraph:

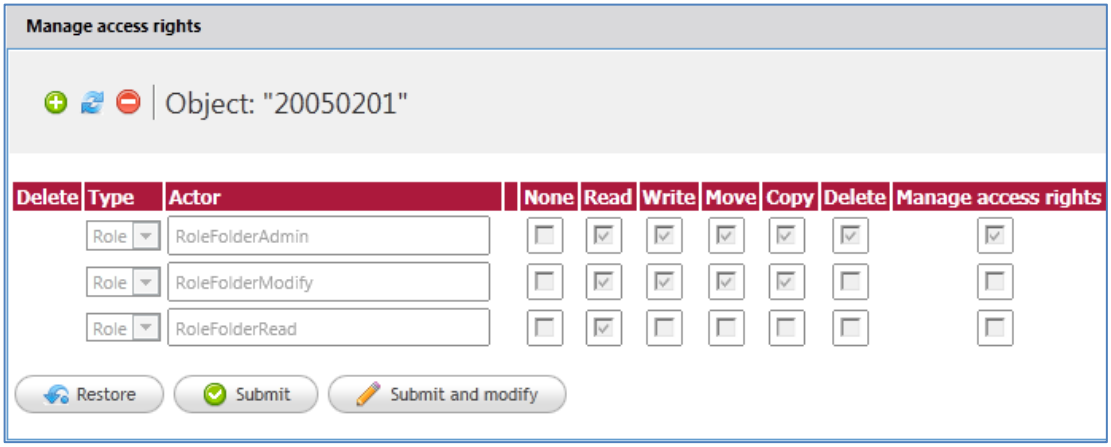


Figure 106: Managing rights

Annotate

Click on the icon [Annotations].

Reference
For more information, please refer to the CORE Administration – EverSuite Interface guide.

Detach an object

- Click on the icon [Delete] to unfile an object.

Rename the link between a folder and an object.

- Click on the name of the link between the folder and the object, beneath the object view

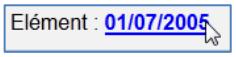


Figure 107: Link between a folder and an object

- The update area opens:

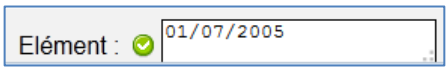


Figure 108: Updating the link between a folder and an object

Click on the icon [Edit object] to confirm your changes.

5 ADMINISTRATOR OPERATIONS

ES-HDS includes a menu intended for application administrators: the Configuration menu.

The main administrator tasks are:

- Analyzing data.
- Indexing filing plan data in full text.
- Managing the profiles used by ES-HDS, along with their rules.
- Configuring the service.

5.1 FULL TEXT INDEXING

Full text indexing of user data is handled by the ES-SIS–Indexing and Searching – service. As well as the standard characteristics of the index, you must indicate the indexer for each table. The indexer may be standard (by default), or *dms* for indexing attached documents, or *hds* for the ES-HDS service.

5.1.1 Declaring the indexer in the table

Folders

When declaring the **HDSNODE** table, which stores all the "nodes" in the tree, you must specify the *hds* indexer. If you have folder attribute tables (like the Customers table, for instance) you must also choose the *hds* indexer for these tables.

Menu Administration > Data source> Relational:

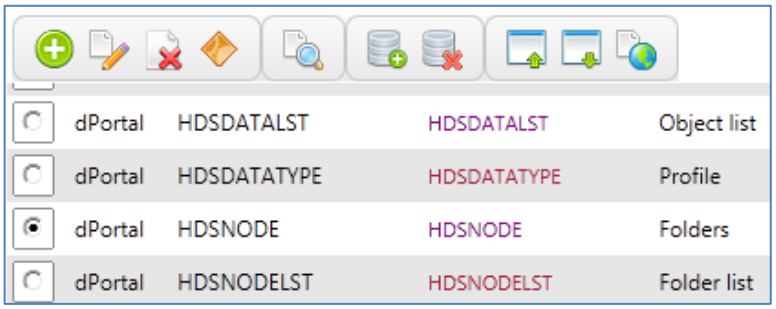


Figure 109: Choosing a table to declare its indexer

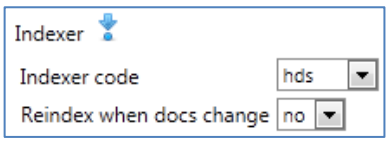


Figure 110: Indexer in a table description

The *hds* indexer is comparable to the *dms* ndexer. It enables in addition to update folder full text indexes simultaneously when folder attributes are updated.

Objects

When declaring data or object tables, choose the *dms* indexer, in order to index attached documents.

5.1.2 Declaring the index

ES-SIS indexing functions can be accessed in the Services > ES-SIS > Index management menu.

To check which tables are associated with the HDS index, choose the icon [Associate with tables]:

Figure 111: Global actions menu in ES-SIS

⇨ Choose an index from the list (e.g. **IndexHDS**) and the associated tables are displayed. At this stage, it is still possible to add to or delete from the list.

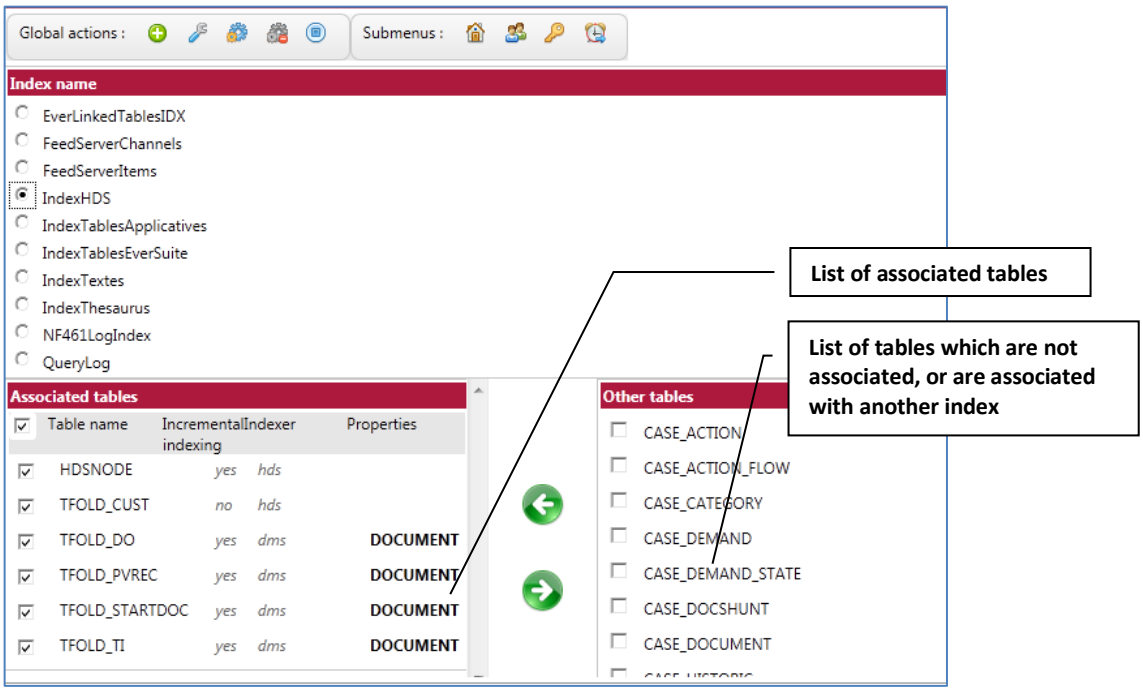


Figure 112: Associating tables with an index

5.2 MANAGING PROFILES

In **ES-HDS**, profiles are managed via the Configuration > Configuration > Profiles menu.

ES-HDS harnesses the power of the profiles available in EverSuite in the ES-PRF service. Profiles let you give records a type which may affect their lifecycle.

Using profiles makes it possible to manage sets of data which have the same characteristics:

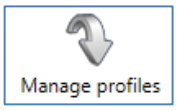
- Input form (EverSuite view)

- Lifespan: the record is deleted or moved to another profile after a certain interval (in days, months or years).

ES-HDS adds extra features to profiles: whether an item is an object or a folder, and a color to identify it in the interface.

Profile management in EverSuite enables you to associate particular types with data tables, so that documents can be grouped by family and searching is simplified.

Two options are available on the screen:



manage all the profiles defined in EverSuite

manage the specific profiles used by ES-HDS.

The two work in the same way:

With the [Add a profile] button, you create a new profile in the application.

With the [Refresh] button, you refresh the list after making a change.

The  [View/Modify profile] icon lets you update the profile.

The  [Delete profile] icon lets you delete a profile.

The  [Check purge] icon lets you check whether there are any records due to be purged.

Profile List		
Actions	Internal code	Label
	ACC	Accounts Dept
	AMAG	Archimag
	SAEDOC	Documents
	BIN	Garbage
	PRES	Press
	PO	Purchase Order
	SAEVEROBJ	Transfer objects
	SAEVERSE	Transfers
	CODENODE	Transaction folder
	CUSTNODE	Customer Folder
	BL	Delivery order
	FIT	Technical services
	PV	Sign-off documents
	DOSSLCT	Initial agreements

Figure 113: Profile list

5.2.1 EverSuite profiles

The first option displays all the profiles defined in EverSuite.

The icon [View/Modify profile] displays the profile definition form on the right... It has three tabs: Profile, Profile purge and Storage.

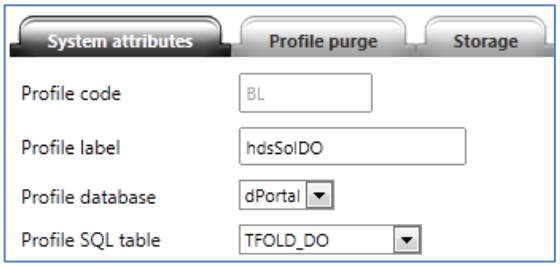


Figure 114: Modifying a profile

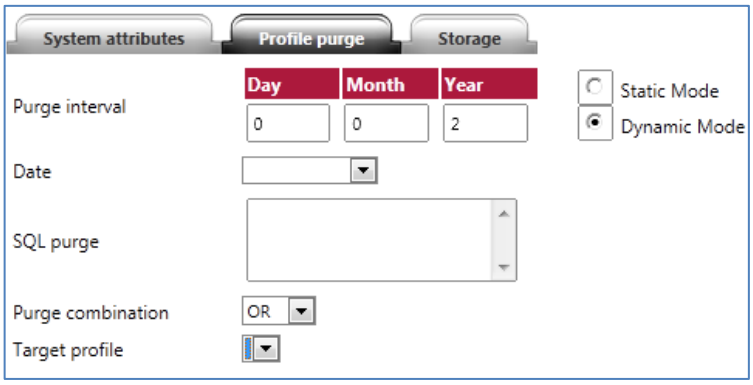


Figure 115: Modifying a profile /Profile purge

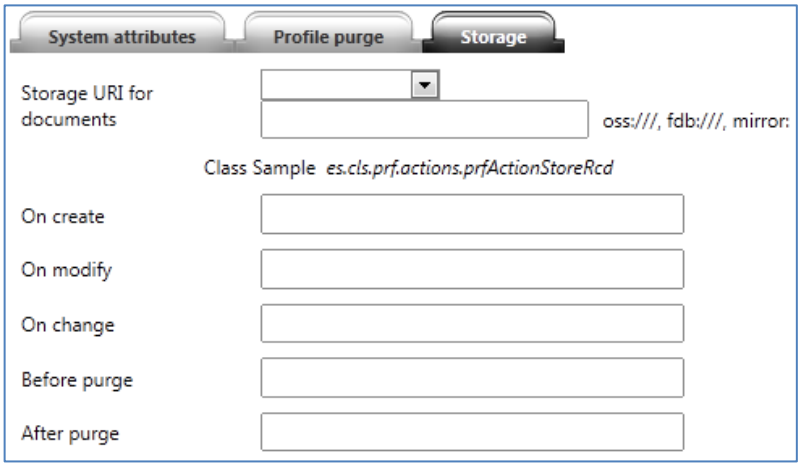


Figure 116: Modifying a profile /Storage

Reminder of a profile's definition:

- The **Profile Code** is up to 9 characters long.
- The **Profile label** is free text.
- The **Profile database** is the database containing the table associated with the profile.
- The **Profile SQL table** is the data table associated with the profile.
- The **Profile purge** determines the document's lifespan. It may be expressed:

- Either as an interval at the end of which the record is deleted from the database and from the profile (in days, months or years),
- or as a SQL condition (e.g. field KEEP = 'no').
- You may combine these two criteria, interval and SQL condition, with the *AND* or *OR* operator.

- The **Target profile** contains a value if you do not wish to delete the record totally, but rather to transfer it to another profile.
- The **Storage URI for documents** is needed when documents are stored in a database or via ES-OSS (storage management system.

5.2.2 Profiles specific to ES-HDS

ES-HDS adds some specific characteristics to its profiles.

The second option, [HDS: Manage profiles] only displays the profiles used by ES-HDS. You also have the insert, update, delete and check purge functions (as described above).

Profiles for services

Actions	Internal code	Label	Type
	PO	Purchase Order	Object
	BL	Delivery order	Object
	FIT	Technical services	Object
	PV	Sign-off documents	Object
	DOSSLCT	Initial agreements	Object
	CODENODE	Transaction folder	Folder
	CUSTNODE	Customer Folder	Folder

Figure 117: List of profiles used by ES-HDS

In ES-HDS, a profile is defined by:

- The **Profile/Service code** is inherited automatically from the profile selected from the drop-down list (label).
- The **Profile/Service table name**s the table associated with the profile.
- The **Profile/Service type** indicates which type of item is associated for ES-HDS:
  - *Object* for items or records,
  - *Folder* for a folder,
  - *Group* for a set of profiles. This profile may be associated with a folder to show all the profiles allowed in this folder.
- In the context of the service, the **Profile purge** only concerns the removal of the reference to the profile item. The record is not actually deleted.
- The **Workflow** processes enable you to manage a record more precisely, when creating, updating or deleting, for example. When deleting, the record is deleted first, and only then the *workflow* starts.

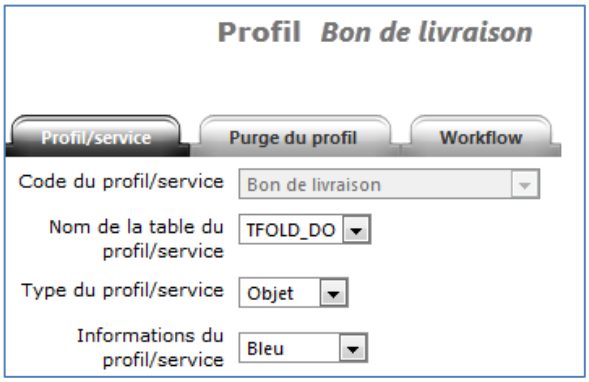


Figure 118: Defining an ES-HDS profile

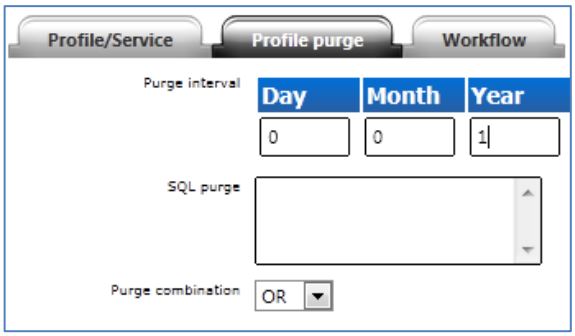


Figure 119: An ES-HDS profile purge

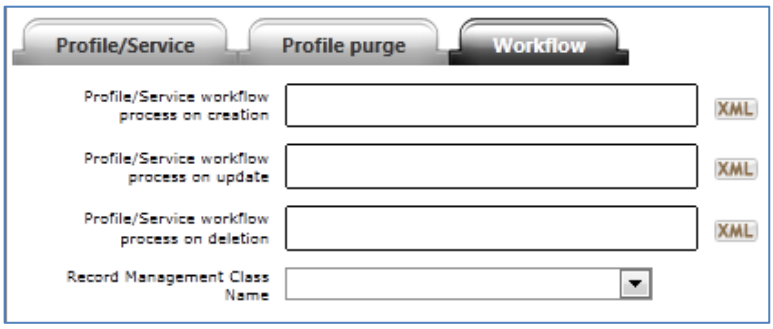


Figure 120: ES-HDS profile Workflow

Tools specific to profile/service

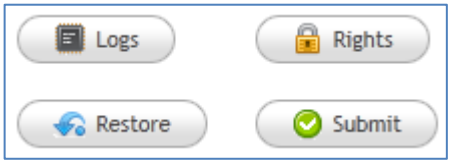


Figure 121: Tools specific to profile/service

The [Logs] button writes logs.

The [Rights] button lets you redefine the rights on all the items linked to this profile.

The [Save] button saves data entered in the three tabs.

The [Restore] button allows you to return to the last saved version.

Reference
For more information on profiles, please refer to the ES-PRF documentation.

5.3 AUTOMATIC FILING RULES

ES-HDS can manage rules for filing objects automatically in a certain position in the tree when they are created, via the Configuration > Configuration > Automatic rules menu.

Depending on an object's metadata, the administrator defines a rule for **selecting** and **filing** it in the right place in the tree. If the object which has just been created matches a SQL rule, it is automatically filed in the folder whose name has been configured. If this folder does not exist, it will be created using a template.

An object may be filed based on:

- either a pre-determined path,
- or a default location defined for the folder.

A filing rule always refers to a profile.

5.3.1 Overview

The Configuration > Configuration > Automatic filing rules menu gives access to the following actions:

- The  icon is for creating a new rule.
- The  icon is for deleting the selected rule from the drop-down list.
- The **Profile** drop-down list displays the list of profiles which already exist.
- The **Rule** drop-down list displays the rules which are already in place for the selected profile.

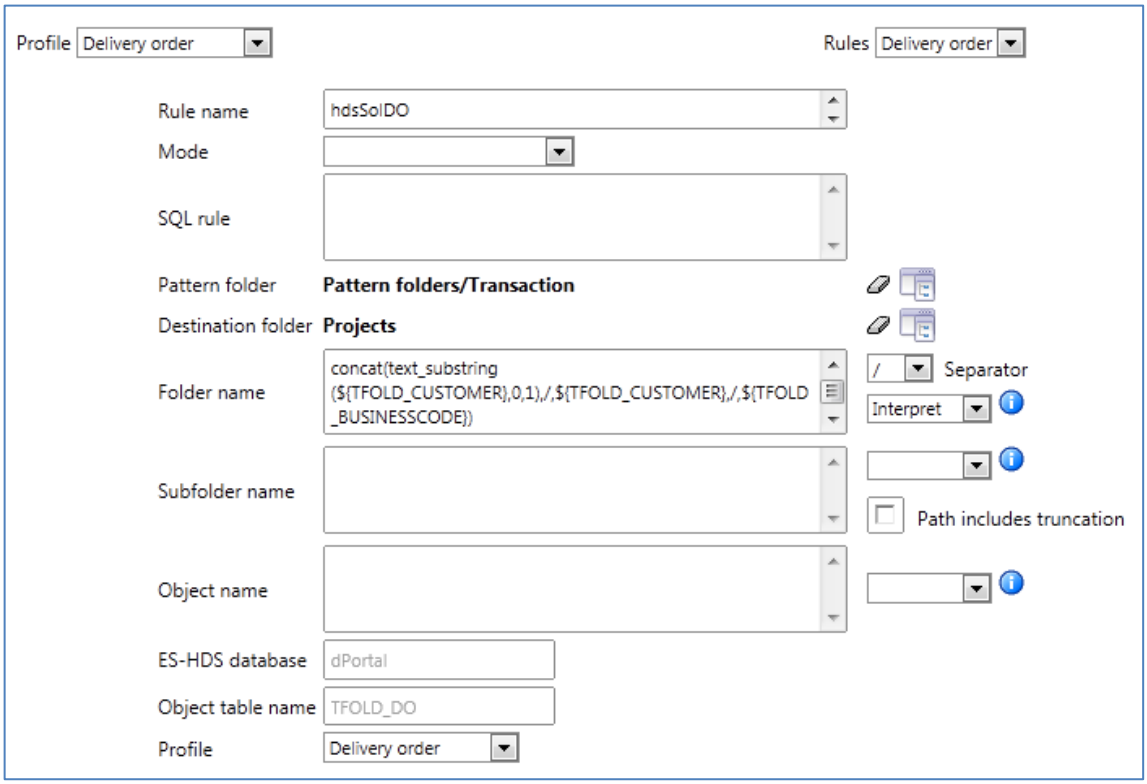


Figure 122: Example: the "Delivery order" profile and the "Delivery order" rule

5.3.2 How it works

Filing an object automatically based on a rule is a two-step process, depending on the values in the rule form fields:

Verification phase

- Test 1st condition: does the item belong to the profile governed by the rule? ⇔ **`Profile`** field (mandatory)
- Test 2nd condition: does the item match a SQL condition? ⇔ **`SQL rule`** field
- Check mode affected by the rule: insert, update, etc. ⇔ **`Mode`** field

Tree search or folder creation phase

- The folder defined by the expression is searched for in the tree. If it does not exist, it is created (preceded by several folders if necessary).
  `Folder name` field (mandatory)
  - Either: Add a fragment of the template tree in this folder.
    cf. **`Reference folder field`**
    Look for the (**`Folder name`**) in the tree created for objects in the current profile (see **`Object profile field`** in the folder record).

- Or: Look in the tree in the (**Folder name**) folder for subfolders (**Subfolder name**).
  field **Folder name** > **Subfolder name**

- (Optional) assignment to the item of the name defined by **Object name**.
  Folder name field > **Object name**

Information
A single object may match several rules and be filed in several folders or subfolders.

5.3.3 Create a rule

Click on the icon [Add a rule]. The input form opens. Begin by selecting the profile from the list, then fill out the fields and validate using the buttons at the bottom of the screen.

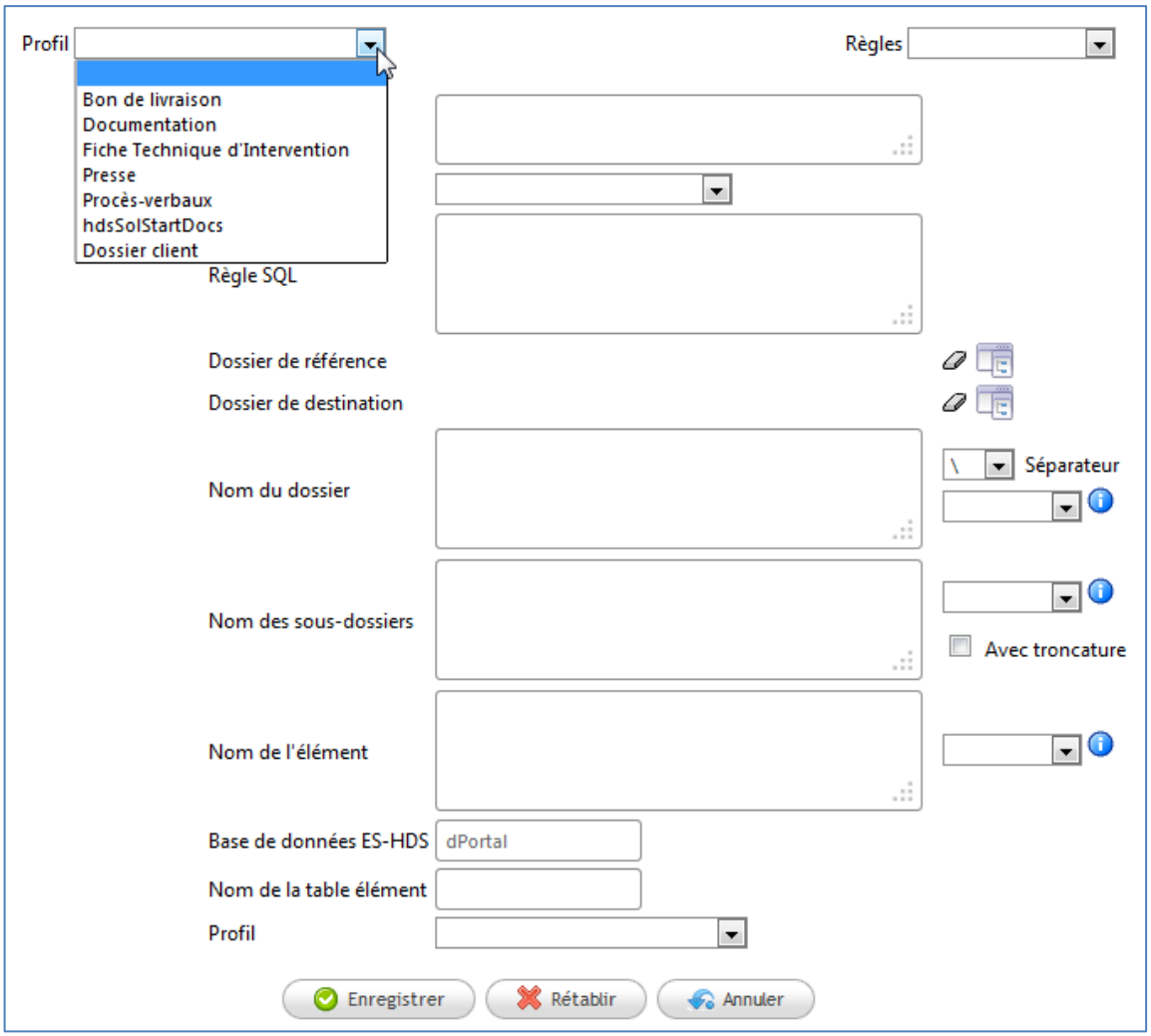


Figure 123: Rule input form / Choice of profile

Characteristics of a rule

Rule name	Optional field. By default, it will contain *RULE* followed by the rule's

	internal identifier. The first rule is therefore *RULE1*.
Mode	Mode in which the rule applies. If this field is empty, the rule is always applied (on insert and update). Otherwise the rule applies: - on insert, - on update, - AIS documents are not filed in ES-HDS. With the Document AIS mode, you must specify the AIS mask template to apply. When a record matches the rule, EverSuite automatically puts the AIS mask defined in the rule on the attached documents. If this record must also be stored in ES-HDS, then you must create an identical rule, without the Template document (AIS) mode.
SQL rule	SQL WHERE clause on the object's fields. If it matches the SQL query, it will be filed automatically according to this rule.
Pattern folder	Root folder for the tree template used as a pattern for searching and creating folders and subfolders. Click on the icon to the right of the field and select the folder. *E.g. "Case code"*
Destination folder	Folder where the new tree will be placed. Click on the icon to the right of the field and select the folder. *E.g. "Projects"*
Folder name	Path and name of the folder which will be created in the destination folder and into which will be placed: - either the tree template, - or the subfolder from the **Subfolder name** field, - or the document directly (if there is no tree template and **Subfolder name** is empty). *E.g. "Customer/Case code"* This folder name may be calculated by using object field names, to define a dynamic folder name. The field name must be written as follows: ${…}. *E.g.* *« concat(text_substring(${NOM_CLIENT},0,1),/,${NOM_CLIENT},/,${CODE_AFFAIRE}) »* *which gives for example the following subdirectories:* *"M/MARTIN/4582"* If this folder does not exist, it will be created.
Subfolder name	Name of any subfolders, placed below the folder given above (**Folder name**). If the folder does not exist, it is created (unless the

	Path includes truncation option is checked). *E.g. SubFolder1/SubFolder2"* These folder names may be calculated by using object field names, to define a dynamic folder name. Truncation is accepted to specify a path with incomplete folder names: *E.g. « Doc%/Comm% »* *for subfolders like "Documentation/Remarks".*
Object name	The name the object will have in the tree view. This name may be calculated from field names. *E.g. « $(field1)»*
Separator	Separator for folders and subfolders. Possible values: / or \ or - .
Interpretation modes	The interpretation mode is to be chosen from the drop-down list next to the Folder name, Subfolder name and Object name fields. Possible values: *IntepretJS*, *Interpret* , *InterpretLk*, *Class*, *ClassMulti*, *NoInter*. (See below for each mode's syntax)
ES-HDS database	Field filled out automatically with the profile selected at the top of the screen.
Object table name	Field filled out automatically with the profile selected at the top of the screen.
Profile	Field filled out automatically with the profile selected at the top of the screen.

Sample tree

In the tree view below, the first part comes from the rule (down to the "Case code" folder) and the second part comes from the tree template with root folder "Case code".

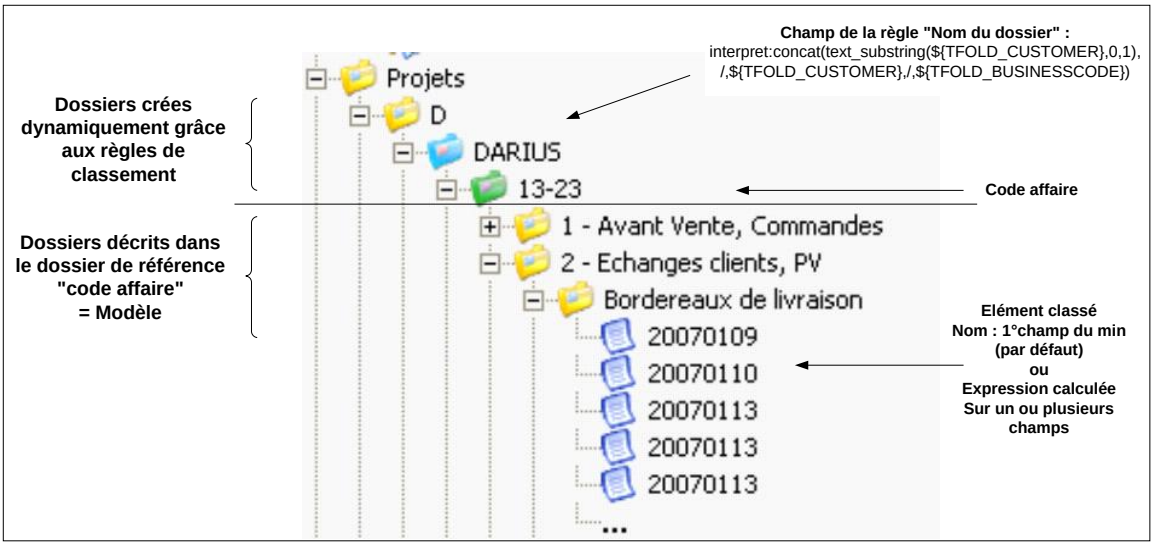


Figure 124: Sample tree

Example

In our example below, we file:

- all the objects whose name begins with "DS-", associated with the "Delivery order" profile,
- in a "Case code" folder for the customer (1° letter/Customer_name/case_code),
- the template or pattern folder being "Case code",
- the overall destination folder being "Projects".
- The item will have the name of the project (**TFOLD_PROJECT** field).

A filed object is displayed like this:

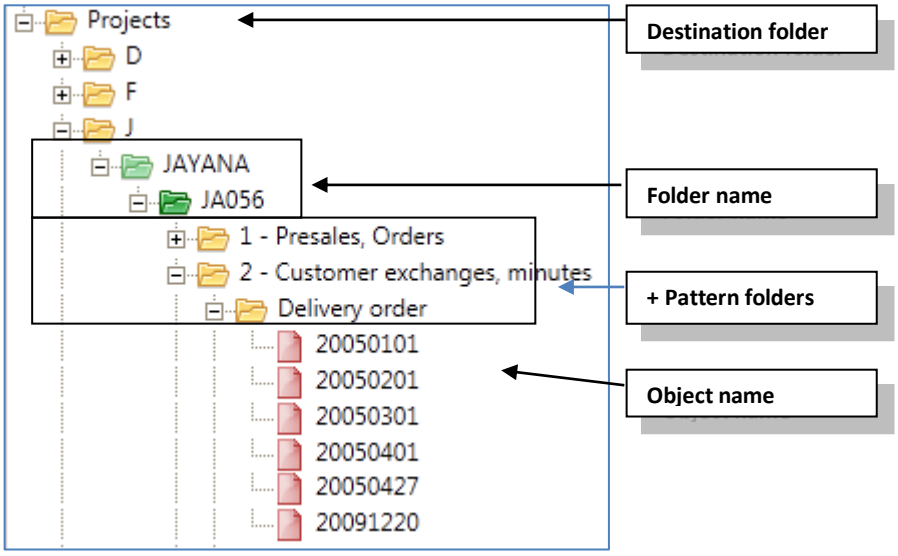


Figure 125: Filing a delivery order according to the rule

The rule is the following:

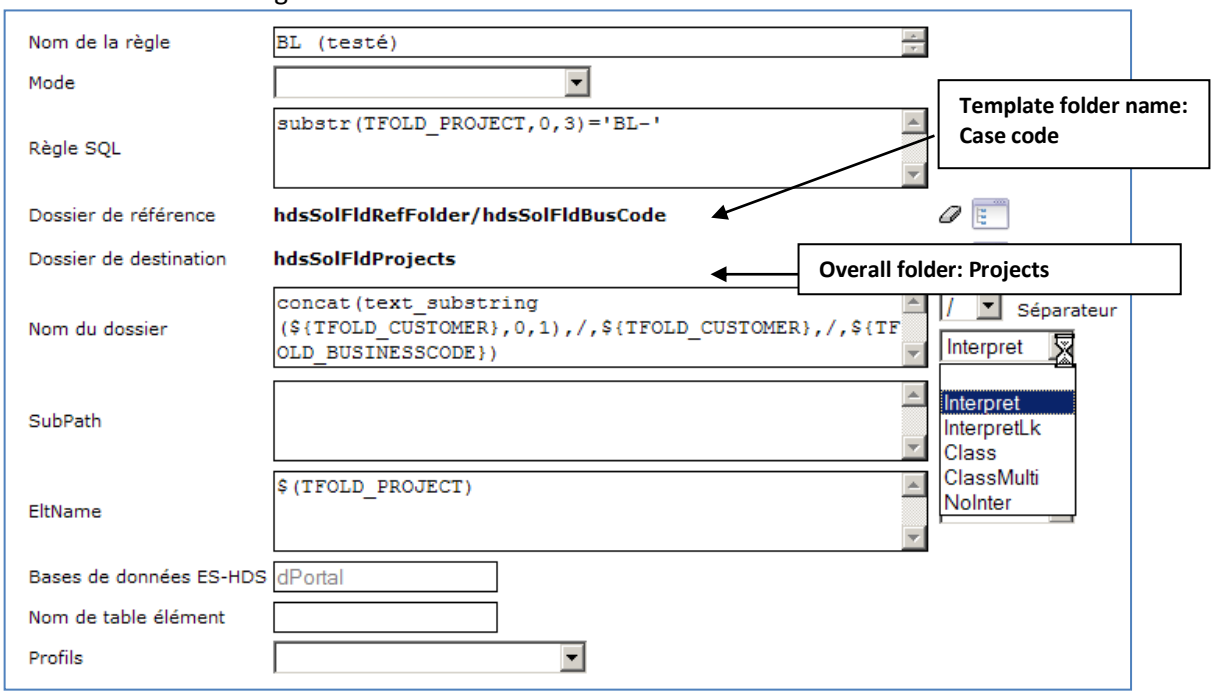


Figure 126: Defining a filing rule

If you wanted to file a copy of the documents in a subfolder, you could create another rule which would have a new folder in its **`Subfolder name`** field:

Subfolder names=Backup or SubPath=Bac%
Object name=${TFOLD_PROJECT}

The Subfolder names are then filed in the two folders: "Delivery order" and "Backup", under the case code.

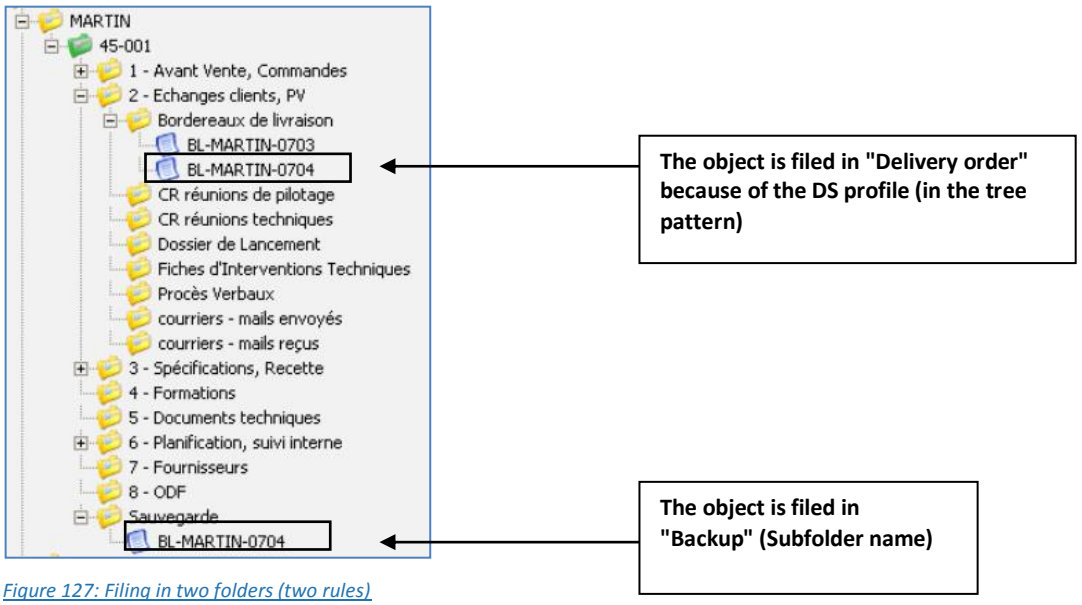


Figure 127: Filing in two folders (two rules)

Defining an SQL condition

In the **SQL rule** field, you may write a complete SQL query, including a join if you wish.

Syntax of a simple "where" condition

MyField1 ='*value*' [and MyField2 ='*value*'] [or MyField3 is not null] ...

Examples:
Testing field values:
CONFIDENTIAL='yes'
NUM_CONTRACT is not null and NAM_CONTRACT is not null

Testing a character string in a field:
substr(NAM_CONTRACT,6,3)='CNT'

Syntax of a complex query with a join

[Query] Select MyField, MyField2, ... from MyTable1, MyTable2 Where .....

And (*primary_key* = #ukvalue#)

It must include: *[Query] at the beginning of the query*
And (primary_key = #ukvalue#) at the end

Caution
In these queries, the fields used in other parts of the rule, whose content you wish to retrieve via ${...}, must be in the SELECT clause of the condition.

Examples:
[Query]select DO_NUM_MARCHE,CATEGORIE,TITRE,NUM_MARCHE
from DONNEES_SSI,MARCHES_AUT
where DONNEES_SSI.DO_NUM_MARCHE=MARCHES_AUT.DKEY
and substr(NUM_MARCHE,6,3)='CNT'
and (CATEGORIE='COMPANIES OFFERINGS'
or CATEGORIE='MARKET SHARE HISTORY')
and (DONNEES_SSI.DKEY = #ukvalue#)

Interpretation of the path and the folder name

It is sometimes useful to be able to create a new folder in subfolders, depending on the whole value or part of the value in some fields.

To do this, you enter a path ending with the name of the folder the records will be filed in in the **Folder name** or **Subfolder name** field.

Basic mode (empty)

If you wish to use field values as they are, simply enter the path with the field names (**${field}**) and leave the interpretation mode empty.

Interpret or InterpretLk mode

If you wish to concatenate or split strings, select **Interpret** or **InterpretLk** (a mode which can handle linked fields). For **interpretLk**, if the field is configured with a **link** control, the value displayed will be the one inherited from the linked table (see the definition of the control).

See below for the tools available with the Interpret option.

Class mode

If you wish to process the path in a particular way: select the **Class** mode and give the name of the specific Java class (package and name) which must always inherit from the: **es.cls.core.tools.ACInterpret** abstract class.

This class contains an **interpretCode** *method* which takes a *String* and an *Object* as arguments (a **Resultset** will always be passed to it). This method returns the path after interpretation.

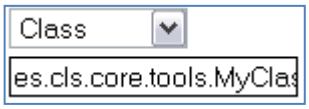


Figure 128: Example of the Class interpretation mode

In this **Class** mode, the **Interpreter** class, or the *specific class*, work only for values containing a single value.

ClassMulti mode

In the **ClassMulti** mode, the specific class handles multivalued values automatically. For example, if you give a series of values (e.g. A/B/C), ES-HDS will create folders A, B and C.
In this **ClassMulti** mode, the **Interpreter** class, or the *specific class*, can handle multivalued values, using the **interpretCodeMulti** method.

Figure 129: Example of the ClassMulti interpretation mode

NoInter mode

The **NoInter** mode does not interpret anything. Thus, if you give it a characters tring *${FIELD1}*, it will be returned as is (and not interpreted).

Operations available with the Interpret mode

concat(string1, string2, ….)	Concatenates all the character strings passed to it as arguments
date(yyyyMMdd)	Today's date with the specified format

date_format(DateString, OriginalFormatString, TargetFormatString)	Converts a *DateString* date formatted with *OrignalFormatString* to the *TargetFormatString*format. Syntax: date_format(${xxx},sourceformat, targetformat) *See examples below*
first(string1, string2, ….)	Returns the first non-empty string
text_substring(string, StartIndex, EndIndex)	Returns an extract from the string between the character at position "StartIndex" and the one at position "EndIndex". The first character has index 0. *See examples below*
if(string1, string2, string3)	Tests if string1 is `true`, in which case string2 is returned, else string3 is returned.
equals(string1, string2)	Tests if string1 is identical to string2, if so returns `true`, else returns `false`.
condition(string1, AND or OR, string2, AND or OR, string3, …..)	Checks the conditions in the order given.

Examples:

DATE field of type "string" ⇨ text_substring
You wish to file records automatically by a "DATCREATION" date declared in a table structure. You want to create a year/month hierarchy.
The rule is written like this:
Interpret ⇨ concat(text_substring(${DATCREATION},0,4),/,text_substring(${DATCREATION},4,6))

For this date in the DATCREATION field: 20070115
The hierarchy will be: 2007/01

DATE field of type"date" ⇨date_format
To handle a date field of type "date", it is preferable to use "date_format".
The syntax is: date_format(${xxx},sourceformat, targetformat)
Examples on Delivery orders in the tree (demo database):

Syntax	*Input date*	*Label*
${TFOLD_DATE}	*20110412*	*20110412*
${TFOLD_DATE}	*12/04/2011*	*12/04/2011*
date_format(${TFOLD_DATE},yyyyMMdd,dd-MM))	*20110412*	*12-04*
date_format(${TFOLD_DATE}dd/MM/,yyyy,dd-MM))	*12/04/2011*	*12-04*
concat(${TFOLD_PROJECT}, _ ,date_format(${TFOLD_DATE},yyyyMMdd,MM-dd))	*20110412 project: P1*	*P1 _ 04-12*

Caution

The date format must use cases as shown below:

Year	***yyyy***	***(lowercase)***
Month	***MM***	***(UPPERCASE)***
Day	***dd***	***(lowercase)***

Defining subfolders different from the template

The **`Subfolder name`** field lets you specify exactly which folder(s) or subfolder(s) to use, instead of leaving ES-HDS to look in the tree template for the folder containing the objects via the profiles.

This is the case in our example above:

Subfolder name=backup
Object name=${TFOLD_PROJECT}
Using the "DS (copy)" rule "DS" items are also filed in the backup folder.

Summary

The definition and execution of a filing rule basically depends on:

- the destination folder
- the **`Folder name`** (which is the root folder of the tree template)
- the final folder corresponding to the **`profile`**
  OR
- the folder set in **`Subfolder name`**.

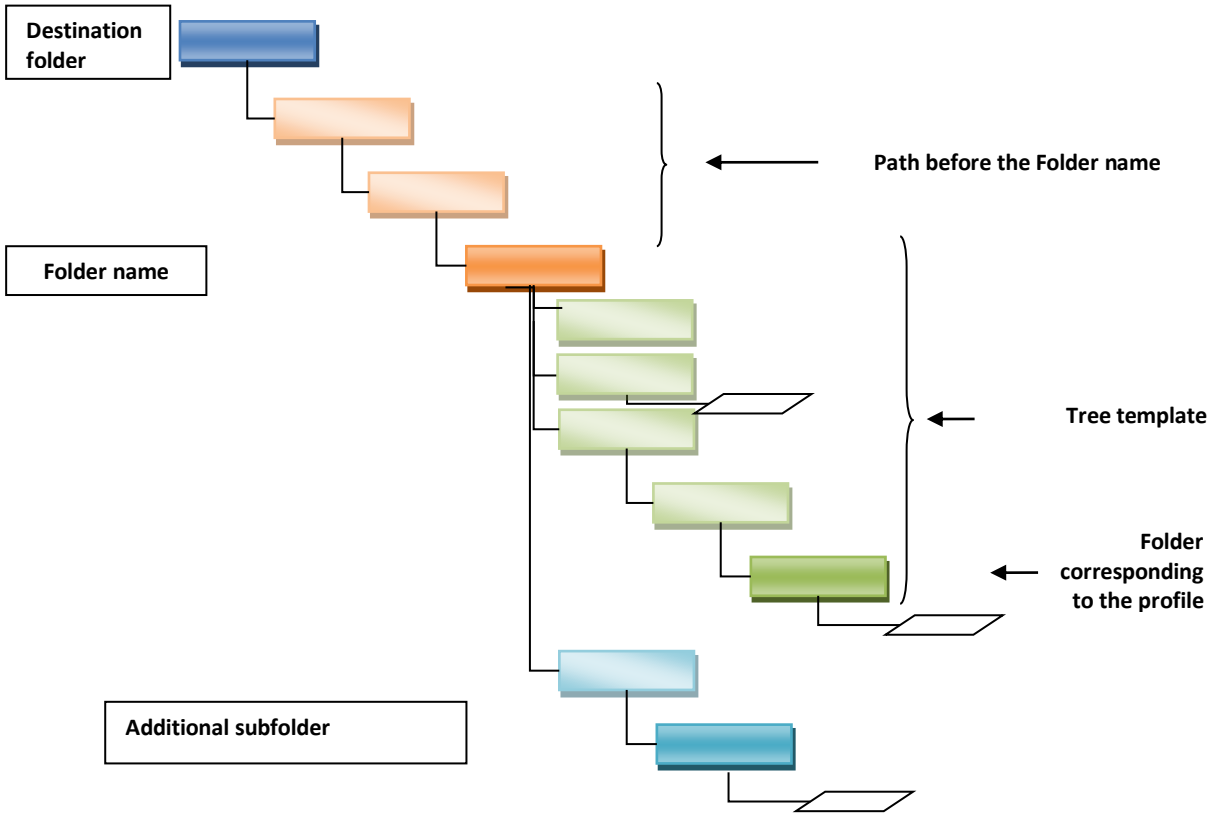


Figure 130: Summary of how a filing rule works

5.3.4 View/ Modify a rule

- Select the profile affected then the rule from the drop-down list.
- Make your changes
- Validate using the button [Submit] at the bottom of the screen.

5.3.5 Delete a rule

- Select a rule and click on the icon [Delete rule].

5.4 MANAGING THE FILING PLAN AND RULES

To manage the filing plan, it may be necessary to carry out global or partial updates, via the Configuration > Tools menu:

- Clean folders
- Update data to conform to a new rule.

5.4.1 Clean folders/Execute rules on stored list

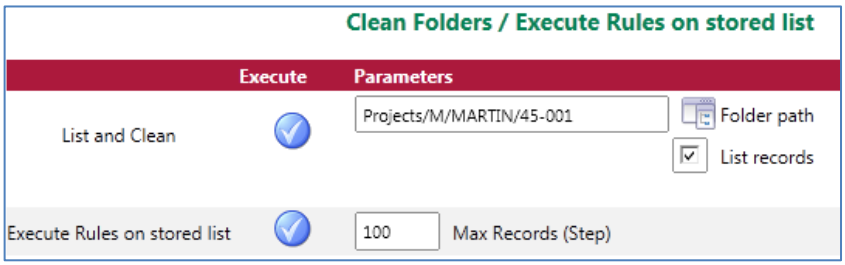


Figure 131 : Clean folders/Execute rules on stored list

- Validate "List and clean"

<Command>Clean</Command>

<Return>-1</Return>

</hdsProject>

```
– <hdsProject>
    <Command>Clean</Command>
    <Return>-1</Return>
  </hdsProject>
```

- Then, validate **Execute rules on stored list**:

```
– <hdsProject>
    <Command>ExecFromList</Command>
    <Return>-1</Return>
  </hdsProject>
```

5.4.2 Execute rules

If a profile's filing rule changes, you may, as administrator want to apply it to the data already in the affected table.

This means executing new filing rules on records already associated with profiles. This procedure is carried out in a specific interface or by a URL.

ES-HDS Interface

This action is done in the second part of the Configure > Tools > Other services > Clean folders/Execute rules menu:

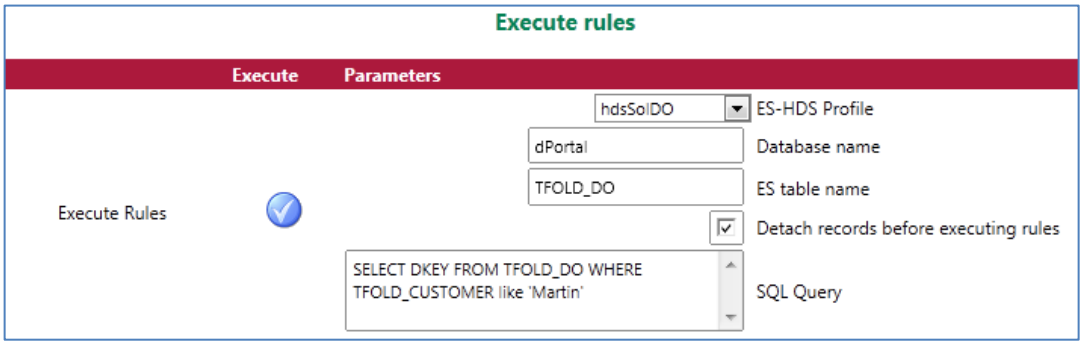


Figure 132: Executing rules via the ES-HDS interface

URL

Run the following URL, taking care to check the name of the profile database and the associated databases.

For example: a "press" profile declared in the dPortal database (table PRFPROFILES-key:10) which is for "Article" records in the BDEMO table in the demodata database and has the rule "press".

http://myserver:8080/mywebapp/HDSUtilities?

HDSDBName=${sd.hdsDBName}
&HDSService=HDSRules
&Command=putQryObj
&ObjDataType=10
&ObjDBName=demodata
&ObjTableName=BDEMO
&Query=SELECT DKEY FROM BDEMO where TYPDOC like 'Article'

"Press" profile key

Data table

Records associated with this profile which are

Figure 133: Executing rules via a URL

Caution
The HDSDBName and ObjDBName parameters must contain the same database, that is, the database of the table affected by the operation.

Another example:
http://spvs:8080/es422_02/HDSUtilities?HDSDBName=dPortal&HDSService=hdsSolDO&Command=putQryObj&ObjDataType=8&ObjDBName=dPortal&ObjTableName=TFOLD_DO&Query=SELECT TFOLD_DOKEY FROM TFOLD_DO where TFOLD_DOKEY > 120

5.5 RIGHTS MANAGEMENT

ES-HDS user rights management offers many possibilities. It applies at different levels:

- Users and roles
- Profiles
- Folders and Objects

Rights management is restricted to an administrator, who has been given the "**Manage access rights**" right at each level (profile, folder and object).

These rights also depend on the service's system parameters.

1.2.2 System parameters

Some rights on folders and objects are defined by default, independently from users and tables, in the Configuration > System parameters menu.

Droits par défaut sur les dossiers et éléments	non	oui : si aucun droit dans ES-HDS n'est défini pour un utilisateur, il a le droit de consultation non : si aucun droit dans ES-HDS n'est défini pour l'utilisateur, il n'a aucun droit
Droits inclusifs	oui	oui : au moins un rôle ayant le droit de lecture donne le droit de lire les données non : au moins un rôle n'ayant pas le droit de lecture enlève le droit de lire les données
Droits sur les nouveaux dossiers	non	oui : l'utilisateur qui crée un dossier a tous les droits sur ce dossier non : l'utilisateur qui crée un dossier n'a pas de droits sur ce dossier. Les droits dépendent de ceux définis en héritage au moment de la création
Droits sur les nouveaux éléments	non	oui : l'utilisateur qui crée un élément a tous les droits sur cet élément non : l'utilisateur qui crée un élément n'a pas de droits sur cet élément. Les droits dépendent de ceux définis sur les structures d'éléments
Droits sur les dossiers/dossier de référence	oui	oui : les droits sur le dossier dépendent de ceux définis sur le dossier de référence (dossier à partir duquel le dossier est dupliqué) non : les droits sur le dossier sont uniquement ceux définis sur le dossier

Figure 134: Rights defined in the system parameters

5.5.1 Rights on EverSuite tables

These rights are defined when the EverSuite application is set up.

When **roles** are defined the applications available to them and the tables accessible for viewing, inserting, updating and deleting are specified. Users therefore have different rights on EverSuite tables depending on the roles they belong to.

5.5.2 Rights on a profile

Specific rights are defined on profiles managed by ES-HDS (service profile). These rights affect objects associated with these profiles in the **tree**:

- View an object (Read)
- Update an object (Write)
- Move an object
- Copy an object
- Delete an object.

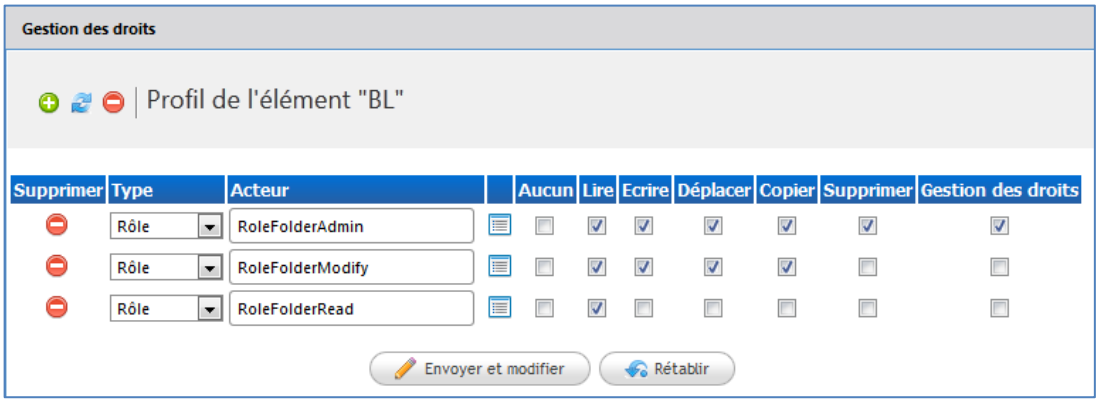


Figure 135: Rights defined on the "DO" profile

5.5.3 Rights on a folder

Rights for folders may be defined at various stages:

- When the folder is defined in the templates (or Pattern folders)
- When a folder is created ad hoc in the tree.

Defining a pattern folder

These rights govern the actions permitted on the folders which will be created from this template in the tree:

- View a folder
- Modify a folder
- Move a folder
- Copy a folder
- Link a folder
- Link an object
- Delete a folder

These two rights, **Link a folder** and **Link an object**, are particularly important for automatic filing.

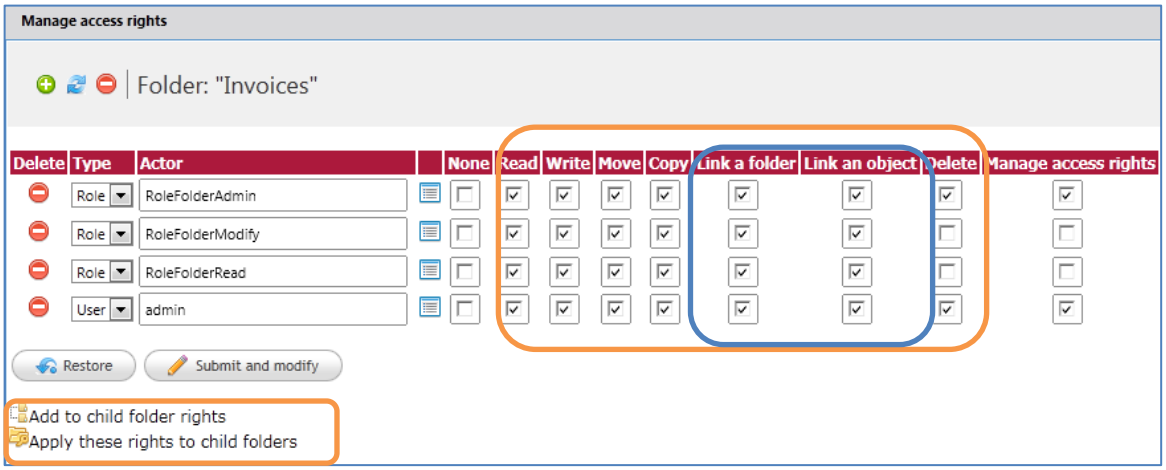


Figure 136: defining rights on a folder

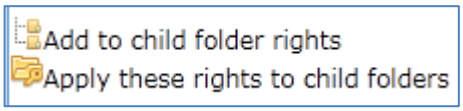


Figure 137: Options available for folder rights

These two options are available on a folder if the current user has the right to **manage rights** on this folder. They are used for setting up rights quickly on pattern folders, and are the equivalent of individual actions carried out by the administrator.

Creating a folder

When creating a folder, you can choose to inherit the parent folder's rights:

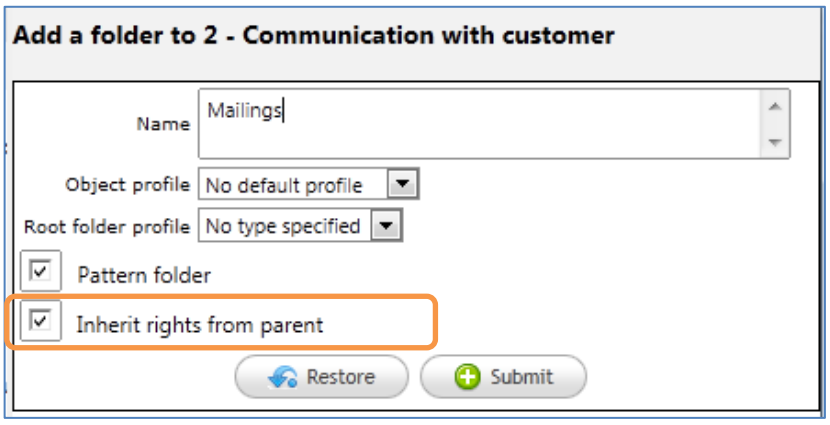


Figure 138: Inheriting parent folder rights

5.5.4 Rights on an object

Rights on objects are inherited from the rights defined for a pattern folder. They cannot be modified. However, an administrator may add extra rights on an ad hoc basis.

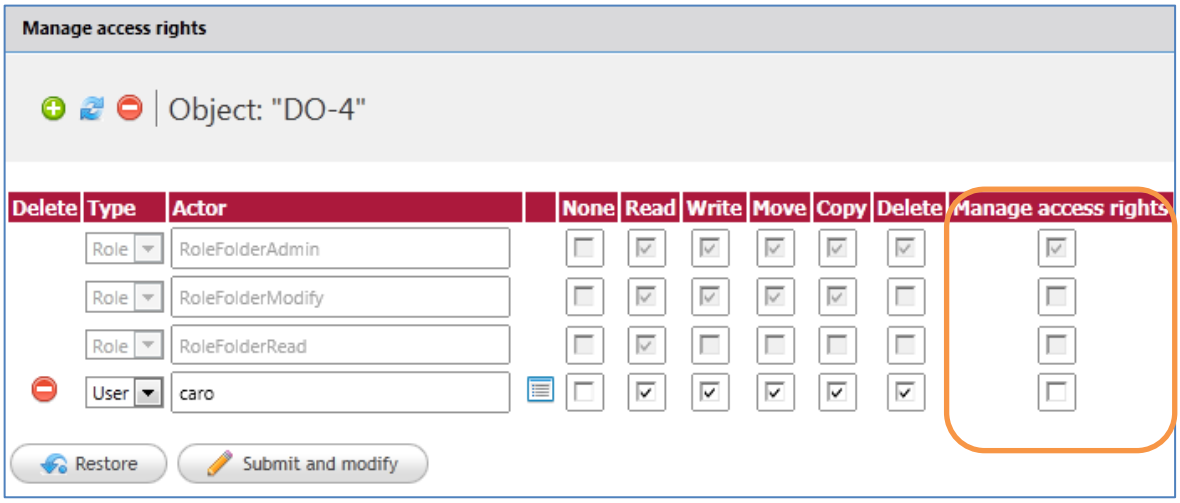


Figure 139: Adding extra rights for an object

These rights affect the actions permitted on the object itself in the tree:

- View an object
- Modify an object
- Move an object
- Copy an object
- Delete an object
- Manage rights

Example:
Rights for an administrator on an object filed in a Customer/Case code folder, in the Minutes folder:

Projects > J > JAYANA > JA056 > Customer contact> Minutes

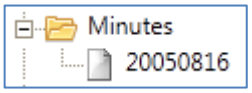


Figure 140: Objects in the filing plan

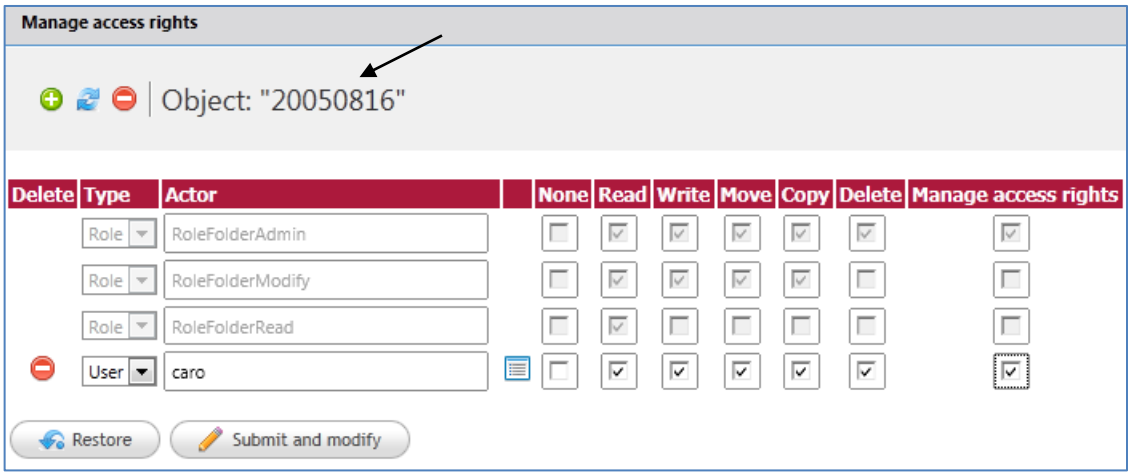


Figure 141: Specific rights on an object

6 CONFIGURATION

For ES-HDS to work well, you must adapt the parameters to suite your site.

All the parameters are accessible via the Configuration > Configuration > All parameters menu. It presents all the service parameters, in alphabetical order, as in the other EverSuite services.

The parameters are also accessible - depending on their type - in the two other parameter menus:

- **system parameters**, in the Configuration > Configuration > System parameters menu.
- **interface parameters**, in the Configuration > Configuration > Interface parameters menu.

6.1 SYSTEM PARAMETERS

System parameters are the ones used by the server side of ES-HDS (seethe HDS API). They may be defined for each ES-HDS database declared in EverSuite.

The system parameters govern the rights given to each object described in your data tables (SQL tables) managed by ES-HDS. They are stored in a single parameter (*ESHDSParameters*) in the **CSPARAMS** table, which appears at the top of the list in the All parameters menu.

Information
This parameter does not appear in the CSPARAMS table until it has been updated. It is not initialized and there are only default values. When it is initialized, it appears in the parameters table.

In the drop-down list, select the database and adapt the parameters to your set-up.

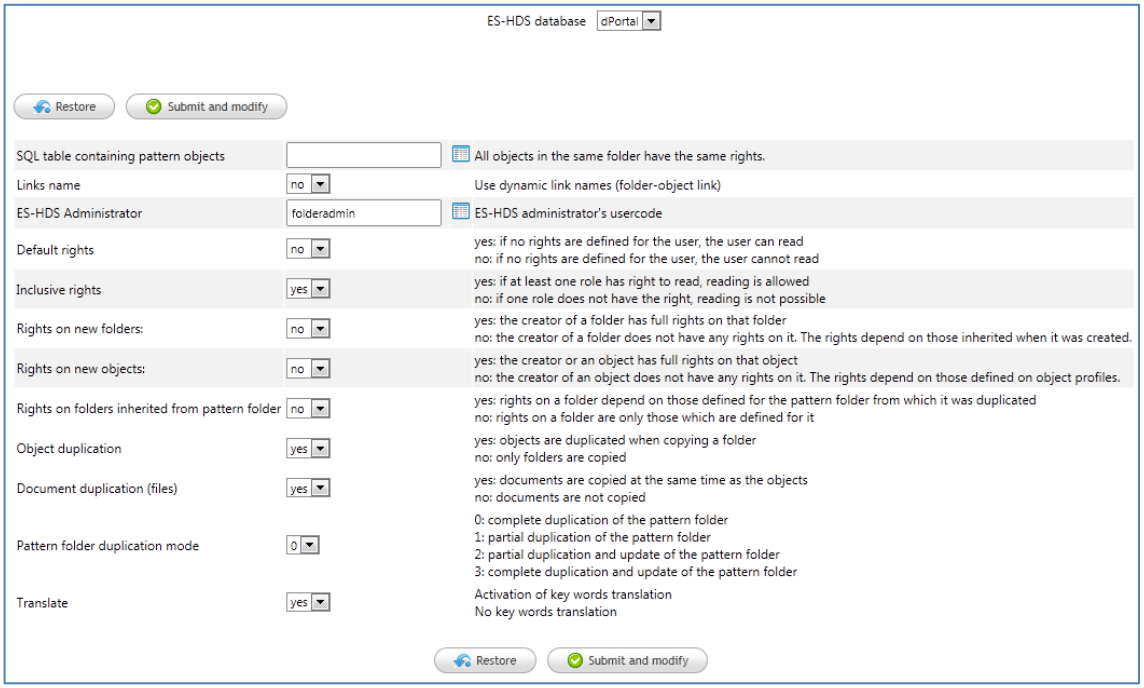


Figure 142: System parameters on the dPortal database

For each database, there is a tag for the name of the database declared in the EverSuite application. Each nested tag corresponds to one of the parameters described in the following paragraphs.

The content of the parameter is an XML string:

```
<?xml version="1.0" encoding="ISO-8859-1"?>
<HDSParam>
        <dPortal>
                <EltRef/>
                <DcLk>no</DcLk>
                <AdminUsrCode>folderadmin</AdminUsrCode>
                <DefaultRight>no</DefaultRight>
                <IncRight>yes</IncRight>
                <SetFullRight>no</SetFullRight>
                <SetFullRightElt>no</SetFullRightElt>
                <RightNodeRef>yes</RightNodeRef>
                <DupliqElts>yes</DupliqElts>
                <DupliqEltsDocs>yes</DupliqEltsDocs>
                <ModeRulesRefNode>0</ModeRulesRefNode>
                <Translate>yes</Translate>
        </dPortal>
</HDSParam>
```

Name of the ES-HDS database declared in EverSuite

Figure 143: Configuration menu

6.1.1 Pattern object tables (EltRef)

Default: empty

Here you may define objects in a table as pattern objects for managing rights in the ES-HDS tree. A reference objet belonging to a folder makes it possible to set rights on all the objects in the pattern.

If a folder contains a pattern object, all the objects belonging to this same folder will have the same rights as the pattern object. This makes it possible to apply rights on objects based on their position in the tree.

Click on the icon to the right of the input area to select a table from the list of tables declared in the ES-HDS database.

Caution
Rights set outside the tree are not taken into account when there is a pattern object.

It is necessary to restrict the right to Manage access rights on a reference object so that everyone does not have total control over all the objects in the folder. Users who do not have the right to Manage access rights on the pattern object will not see it in the folder.

6.1.2 Dynamic management of link names (DcLk)

Default: `no`

When you enter the name of a link, you may for example enter `${USERNAME}` where USERNAME is an attribute of the item associated with the folder. In the tree view, the user will see the user name instead of `${USERNAME}`.

In the drop-down list, choose whether to activate the dynamic link name management mode or not. This parameter makes it possible to use the content of objects' fields to name links between folders and objects.

6.1.3 ES-HDS Administrator (AdminUsrCode)

Default: admin

This is for specifying a user other than "admin" who has administrator rights on HDS data. ES-**HDS** can have several ES-HDS databases declared for the same EverSuite application, which means that there can be different administrators for each ES-HDS database.

Click on the icon to the right of the input area to select a user who will have administration rights on ES-HDS data.

6.1.4 Default rights on folders and objects (DefaultRight)

Default: `no`

This parameter sets default rights for a user who does not have any rights defined on an ES-HDS folder or object.

In the drop-down list, choose whether to activate the default rights management mode or not.

6.1.5 Inclusive rights (IncRight)

Default: `yes`

If the inclusive mode is selected (`yes`), a user with at least one role giving him read access will be able to read data. If the exclusive mode is selected (`no`), all a user's roles will have to give her read access before she can read data.

In inclusive mode, having just one role with the right is enough to have the right. In exclusive mode, having just one role without the right is enough to remove the right completely.

Note: This mode is only enabled if default rights are set to `yes`.

In the drop-down list, choose whether or not to activate the inclusive mode.

6.1.6 Rights on new folders (SetFullRight)

Default: `no`

In the drop-down list, choose whether or not to activate the mode which gives all rights to the creator of the folder.

6.1.7 Rights on new objects (SetFullRightElt)

Default: no

In the drop-down list, choose whether or not to activate the mode which gives all rights to the creator of the object.

6.1.8 Rights on folders/pattern folder (RightNodeRef)

Default: yes

In the drop-down list, choose whether or not to activate the mode which applies the rights on the pattern folder to the current folder.

6.1.9 Object duplication (DupliqElts)

Default: no

In the drop-down list, choose whether to activate object duplication mode or not. When copying a folder, all the items filed in folders and subfolders will be duplicated.

6.1.10 Document duplication (attached files)(DupliqEltsDocs)

Default: no

In the drop-down list, choose whether to activate file duplication mode or not. If file duplication is enabled, all the files associated with duplicated objects will also be duplicated.

6.1.11 Pattern folder duplication mode (ModeRulesRefNode)

Default: 0

In the drop-down list, choose the folder duplication mode:

- 0: complete duplication of the pattern folder
- 1: partial duplication of the pattern folder
- 2: partial duplication of the pattern folder and update of the pattern folder
- 3: complete duplication of the pattern folder and update of the pattern folder

6.1.12 Keyword translation (Translate)

Default: no

In the drop-down list, choose whether or not to activate keyword translation.

6.2 INTERFACE PARAMETERS

Interface parameters are the ones used by the client side of ES-HDS (ES-HDS templates). They are defined once for all ES-HDS databases declared in the ES-HDS application.

These parameters can be viewed and updated in the All parameters menu, in alphabetical order. They also appear, in the old interface, in the Interface parameters menu.

6.2.1 Interface setup summary

The interface parameters affect screen layout and how the data is displayed in ES-HDS screens.

This screen shows the interface on which the parameters described in the following paragraphs will act.

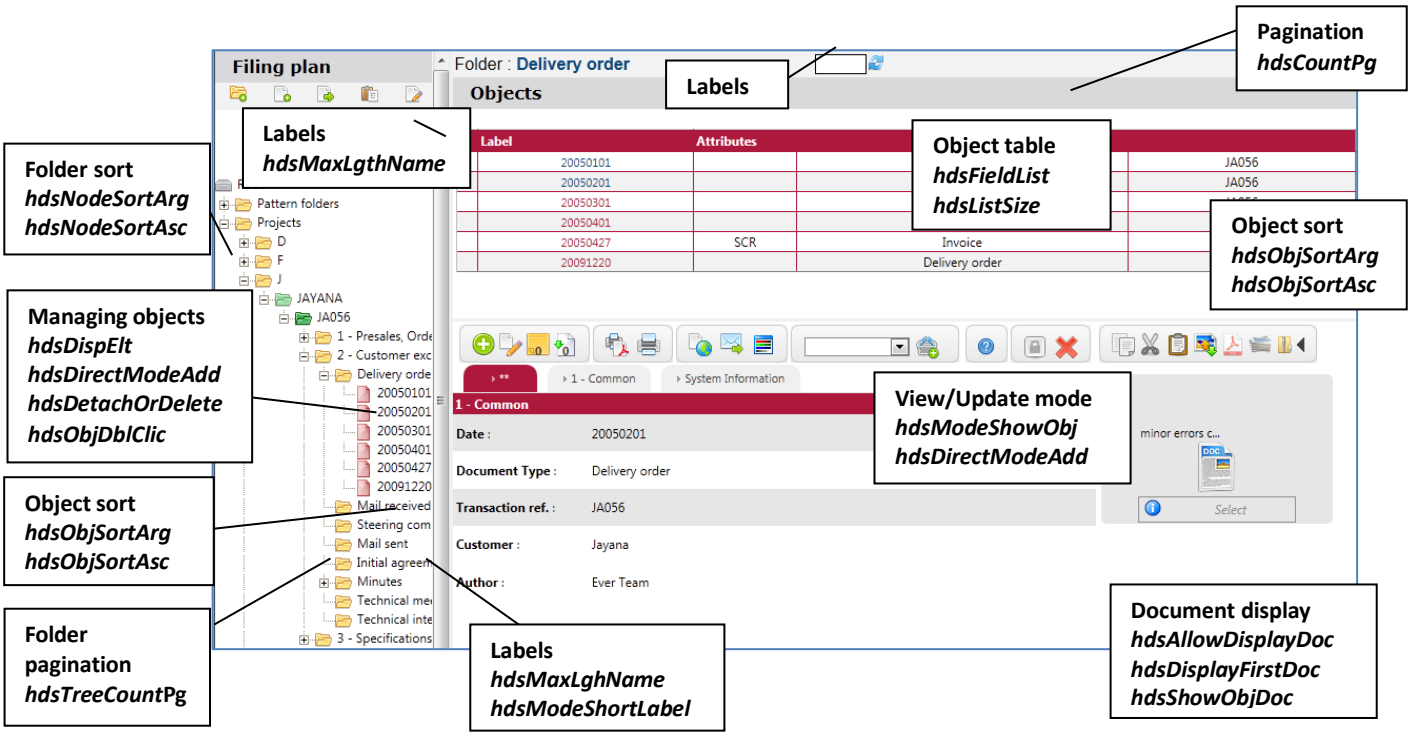


Figure 144: Overview of interface parameters

6.2.2 Interface parameters

Each parameter may be modified in this interface. The list looks like this (extract):

hdsAllowDisplayDoc	true	VALUES true, false
hdsApplication	ES-HDS	Application
hdsCountPg	20	Number of objects per page (default: 20)
hdsDBName	dPortal	HDS DBName
hdsDispElt	True	VALUES True, False
hdsModePg	1	Pagination mode for object list ([0: append]/[1: pages] (default)
hdsPath	/apps/hds	Hds path
hdsTreeCountPg	20	Number of objects and folders in tree view (default: 50)
hdsDisplayFirstDoc	..	View first document before record [true]/[false](default)
hdsModeShowObj	..	Default object display mode [Disp: view only] (default) /[Upd: update]
hdsShowObjDoc	..	Default display mode for objects/documents [Object: object] (default)/[Document: 1st document attached to the document]/ [DocumentPDF: 1st PDF document attached to object]
hdsModeShortLabel	..	Truncation mode for labels which are too long [End] (default)/[Middle]/[Begin]
hdsMaxLgthName	..	Maximum label length (default: 40)
hdsPrfPath	..	Path of the directory containing the ES-HDS templates for working with profiles (default: /apps/hds/prf)
hdsFieldList	..	Fields in object list [min] (default)/[query]
hdsListSize	..	Height of list frame in the tree view as %. (default: 35)
hdsNodeSortArg	..	Sort field for folders in the tree view: NAME (default), DKEY, DFLTASSOCTYPE, NODE_TYPE
hdsNodeSortAsc	..	Ascending or descending folder sort [true: ascending] (default)/[false: descending]
hdsObjSortArg	..	Sort field for objects: NAME (default), DKEY, NUMORDER, OBJ_TABLENAME
hdsObjSortAsc	..	Ascending or descending object sort [true: ascending] (default)/[false: descending]
hdsDirectModeAdd	..	Alow objects to be added directly to the HDS tree view [yes] (default)/[no]
hdsDfltSearch	..	Default search mode: [SIMPLE_SQL] (default), [QBE_SQL], [EXPERT_SQL], [SIMPLE_FT], [QBE_FT], [EXPERT_FT], [EXPERT_GROUP_FT]
hdsDfltNodeType	..	Display mode for specialized folders in the tree after an object search [-10: 1st specialized folder containing the object] (default)/ [-9: whole tree]/[Specialized folder profile key: tree starting from this type of folder]
hdsObjDblClick	..	View the document by double-clicking on the object [true]/[false] (default)
hdsShowBtnIdent1	..	Display the 'View in tree' button in the results list [true] (default)/[false]

Figure 145: List of interface parameters (extract)

The standard parameter update screen is like this:

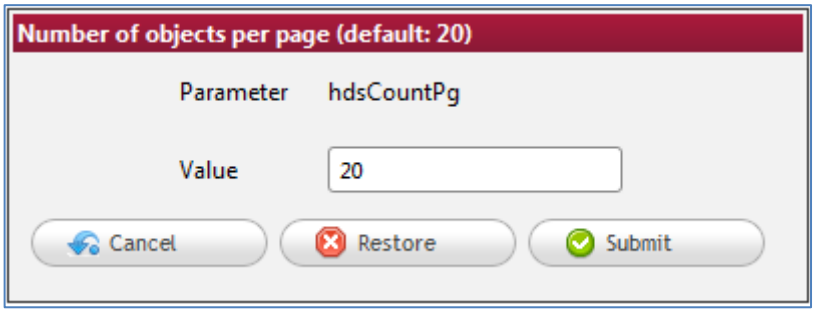


Figure 146: Updating a parameter

It includes the following buttons:

- [Cancel]: cancel changes
- [Restore]: initialize all the parameters with their default value
- [Submit]: validate and return to the parameter list.

In the parameter screen, the [Validate] button refreshes the data you have just entered.

6.2.3 All parameters

This menu brings together all the ES-HDS parameters, in alphabetical order, as in the other EverSuite services. Each parameter can be modified directly in the input box.

6.3 PARAMETER LIST

Reference
For a detailed explanation of all the ES-HDS parameters, please refer to the EverSuite CORE Parameters guide.

Parameter Name	Definition	Default value
General parameters		
ESHDSParameters	System parameters for the server side of the ES-HDS service, defined for each ES-HDS database	XML stream containing a default value for each parameter
hdsDBName	Name of the database filed in ES-HDS (first parameter to define)	*dPortal*
hdsApplication	Name of the application filed in ES-HDS	*ES-HDS*
hdsPath	Path of the directory containing the ES-HDS templates	*/apps/hds*
hdsPrfPath	Path of the directory containing the ES-HDS templates for working with profiles	*/apps/hds/prf*
Managing folders and items in the tree		
hdsDispElt	View objects in the tree ▪ *true*: view folders and their objects in the tree view ▪ *false*: view only folders in the tree view.	*true*
hdsModeShowObj	Default display mode for objects: ▪ *Disp*: view mode ▪ *Upd*: update mode.	*Disp*
hdsShowObjDoc	Default display mode for objects/files: ▪ *Object*: object is displayed	*Object*

	▪ *Document*: 1st file attached to the object is displayed ▪ *DocumentPDF*: 1st PDF file attached to the object is displayed, if there is one	
hdsDirectModeAdd	Allow an object to be added directly to the tree: ▪ *yes*: the input form opens as soon as a profile is selected. ▪ *no*: list of existing objects first.	*yes*
hdsPurgeDelNode	Delete the folder record from the tree when purging *true* / *false*	*false*
hdsDetachOrDelete	Detach or delete an object from the tree: ▪ *detach*: remove the record from the tree. ▪ *delete*: delete the record completely.	*detach*
hdsTreeCountPg	Maximum number of folders/folder objects displayed in the tree view	*50*
hdsMaxLgthName	Maximum length of object labels	*40*
hdsModeShortLabel	Truncation mode for object labels which are too long ▪ *End*: truncated at the end ▪ *Middle*: truncated in the middle ▪ *Begin*: truncated at the beginning.	*End*
WDhdsProfileTag	**Obsolete For** **Webdav applications: name of the Windows folder in which profiles are displayed**	*- Profiles -*
WDhdsSimpleMode	**Obsolete.** For Webdav applications: labels displayed in the identifier in the URL ▪ *true*: label displayed ▪ *false*: key and label displayed	*true*
hdsNodeFilter	Hide typed folders with filtered attributes	*false*

	true / *false*	
Display order for folders and objects in the tree view		
hdsNodeSortArg	Sort field for folders in the tree view (HDSNODE table) : *NAME*, *DKEY*, *DFLTASSOCTYPE*, *NODE_TYPE*	*NAME*
hdsNodeSortAsc	Ascending or descending sort for folders in the tree view, on the field declared in **hdsNodeSortArg**: *true* (ascending) / *false* (descending)	*true*
hdsObjSortArg	Sort field for objects in the tree view (HDSDATALST table) : *NAME*, *DKEY*, *NUMORDER*, *OBJ_TABLENAME*	*NAME*
hdsObjSortAsc	Ascending or descending sort for objects in the tree view, on the field declared in: **hdsObjSortArg**: *true* (ascending) / *false*(descending)	*true*
hdsFullObjAttr	Obtain all the attributes of the record in the tree, in the XML stream. *true* / *false*	*true*
Object list		
hdsCountPg	Maximum number of objects displayed per page in the list of objects in a folder	*20*
hdsListSize	Height of list frame (as a %), in the tree view	*35*
hdsFieldList	Fields displayed in the list of objects in a folder: ■ *min*: fields in the table's minimum view ■ *query*: fields visible in search mode for the table.	*min*
hdsModePg	Pagination mode for the object list, for viewing the following items: ■ *0*: add following items to the list ■ *1*: display another page.	*1*
Managing documents		
hdsAllowDisplayDoc	View attached documents as thumbnails, when viewing/updating objects: ■ *true*: display thumbnail	*false*

	▪ *false*: display a link to the document.	
hdsDisplayFirstDoc	View the first document before the record, when viewing (only if **hdsModeShowObj** = *Disp*) ▪ *false:* link above the record ▪ *true:* link below the record + thumbnail next to the record.	*false*
hdsObjDblClick	View the document by double-clicking on the object *true* / *false*	*false*
Searching and filing		
hdsDfltSearch	Default search mode: *SIMPLE_SQL*, *QBE_SQL*, *EXPERT_SQL*, *SIMPLE_FT*, *QBE_FT*, *EXPERT_FT*, *EXPERT_GROUP_FT*	*SIMPLE_FT*
hdsShowBtnIdent1	Display the "View in tree" button in the results list (displayed according to the hdsDfltNodeType parameter) *true* / *false*	*true*
hdsShowBtnIdent2	Display the "Rights" button in the results list *true* / *false*	*true*
hdsShowBtnIdent3	Display the "Put object in folder" button in the results list *true* / *false*	*true*
hdsDfltNodeType	Display mode for typed folders in the tree after an object search: *-10*: first typed folder containing the object *-9*: whole tree *Typed folder profile key*: tree starting from this type of folder	*-10*
hdsOnlyOneRule	File according to the first valid filing rule only: ▪ *true*: only the first valid filing rule is executed. ▪ *false*: all valid filing rules are executed.	*false*

Figure 147: All the ES-HDS parameters

TABLE OF ILLUSTRATIONS