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| --- | --- |
| PRE-WORK SECTION | |
| 1.1. APLICATION GUI On the Home screen there are 3 main navigation buttons (upper right corner) for moving throughout the application options: *Documents, Dashboard and Account*;   * *Documents* – section for creating documentation. It has 2 navigation buttons (upper left corner):   + *Templates* tab–upload, preview, download and delete templates;   + *My Documents* tab – list of all generated documents without those downloaded locally only; * *Dashboard* – section for setting the application before start using it;   + It has 8 tabs for settings (upper left corner): *Profile Settings, General Settings, Users, Authorization, Security, Invoices, Sources and Directories*;   + On the right side of the screen there is the App dashboard with basic statistics and contact form for communication with OpenPuzzles support team; * *Account* tab – section with username where you can change your password and log out from the App; | C:\Users\Moca\Desktop\Untitled-2.jpgC:\Users\Moca\Desktop\Untitled-1.jpg |
| 1.2. MAKE EXISTING DOCUMENTS VISIBLE IN THE APPLICATION In order to use your existing documents you should link it with application. There are 3 possible approaches:   * Copy documents to OpenPuzzles servers * Connect with your local servers (SFTP, Sharepoint) * Connect with your online servers (Github, Sharepoint online) |  |
| SETTING UP SOURCES AND DIRECTORIES |  |
| SETTING UP YOUR SOURCES Documents repository (source) is the place on a server where you keep your existing project documents.   * Click on the Dashboard tab; * Click on the *Sources* tab; * When you are registered, default source on OpenPuzzles server is available. * Click on the “*+*” button in the right corner to create a new source; * Write in required data and select user role authorization to define to whom location will be visible; you are allowed to select more user roles, not only one;   Supported Repositories (Source types):   * *Git* –modern version control system; * *SFTP* – popular, simple and secured method of transferring files between two remote systems; * *Sharepoint* – web-based, stand alone, collaborative platform and one of the most used repositories; * *Sharepoint Online* – cloud-based service you can access internal sites, documents, and other information from any point worldwide; | C:\Users\Aleksandra\AppData\Local\Microsoft\Windows\INetCache\Content.Word\1.png  C:\Users\tgd\Desktop\3.JPG |
| SETTING UP OPENPUZZLES APPLICATION FOLDERS *Application folders are exact paths (folder locations) on the configured repositories (sources) where you keep your existing documents, document templates and generated documents.*   * Click on the *Directories* tab;   There are 3 sections:   * *Get input documents from* – Select a folder where your existing business documentation is stored. Minimum folder permissions are read-only; * *Work with template documents at:* – Select folder for storing your templates as a base for creating new project documentation. Minimum folder permissions are read-write; * *Save generated documents to* – Select folder for keeping your generated documents. Minimum folder permissions are write-only;   **You will be allowed to use predefined test SFTP folders in each section. This is enough for the testing period.**  When you want to add more folders continue with the next steps:   * Click on the “*+*” button in the right corner for each section to create folders and paths; * Fill out required data, select [user right role](#_HOW_TO_edit) (you can select more user roles, not only one) and synch type;   If you don’t select any user role, that particular location will be visible to your user only.  We take care about your security and privacy policy and allowing you to select if you want to share the document content or file names only with OpenPuzzles cloud. There are two Synch types:   * *Sync ALL* – This option keeps your data in your repository and also in the OpenPuzzles Cloud, and gives you full [multidimensional search](#_SEARCHING_THE_EXISTING) functionality; * *Sync File Name* – This option will keep your files in existing location only, however you will not be able to have multidimensional search, rather only file names search;   There are 4 buttons that can be used:   * *Upload* – upload your files to the given location; * *Sync* – Synchronize your repository with the OpenPuzzles Cloud. Use this option if you have problems with the search engine, or you have new files which are not visible to the OpenPuzzles App; * *Edit* – Edit your Folder settings; * *Delete* – will delete your remote folder location. | C:\Users\tgd\Desktop\4.JPG  C:\Users\tgd\Desktop\5.JPG  C:\Users\tgd\Desktop\1.JPG  2  C:\Users\tgd\Desktop\Capture.JPG |
| COPY YOUR DOCUMENTS TO OPENPUZZLES SERVERS |  |
| IN APPLICATION  * Go to folder “Get your input documents from” and click on “upload button”. You are entering new window and there you will be able to upload your documents one by one; | SLIKA |
| USING FILEZILLA  * Install the **FileZilla** client;   *https://filezilla-project.org/download.php*   * Insert the required data (box 1): * Host name: **sftp.openpuzzles.com** ; * Port: **22** ; * Username and Password will be sent to Admin in user account activation e-mail (box 3); * Click *Quickconnect* to connect to OpenPuzzles server; * In the left window you can see your local folder and all documents inside; Right window represents your OpenPuzzles working folder dedicated for your existing documents (box 2);   All files copied to your OpenPuzzles folder will be visible in the application and available for new documents creation after [synchronization](#_SETTING_UP_OPENPUZZLES);  PROVERITI U KOJI FOLDER KOPIRA I DETALJNIJE OBJASNITI SINHRONIZACIJU. | **2**  **1**  -------------------------------------------------------------------------------------------------  **3** |
| CONNECT TO YOUR SERVERS |  |
| SFTP  * Click on the Dashboard and then Sources tab; * Click on the “+” button in the right upper corner to create a source;   There are 3 mandatory fields:   * *Type* – Here should be SFTP source type selected; * *Name* – Give a name to your source repository that will be used throughout the OpenPuzzles application; * *Host* – Give a full server name to your SFTP server, for example:   sftp.openpuzzles.com  There are 3 additional fields:   * *User Name* – Here should be username entered; * *Password* – Here enter password for the given username; * *Role* – Here can be defined who will be able to work with this source repository. Roles visible here can be defined under *Authorization* tab. If no role is chosen then user which is setting up this source will be able to work with this source repository exclusively; |  |
| SHAREPOINT  * Click on the Dashboard and then *Sources* tab; * Click on the “+” button in the right upper corner to create a source;   There are 3 mandatory fields:   * *Type* – Here should be Sharepoint source type selected; * *Name* – Give a name to your source repository that will be used throughout the OpenPuzzles application; * *Host* – Give a full server URL to your Sharepoint server, for example:   https://sharepoint.openpuzzles.com  There are 3 additional fields:   * *User Name* – Here should be username entered; * *Password* – Here enter password for the given username; * *Role* – Here can be defined who will be able to work with this source repository. Roles visible here can be defined under *Authorization* tab. If no role is chosen then user which is setting up this source will be able to work with this source repository exclusively; |  |
| CONNECT TO YOUR ONLINE SERVERS |  |
| GIT HUB  * Click on the Dashboard and then Sources tab; * Click on the “+” button in the right upper corner for each section to create sources;   There are 3 mandatory fields:   * *Type* – Here should be GIT source type selected; * *Name* – Give a name to your source repository that will be used throughout the OpenPuzzles application; * *Host* – Give a full URL to your GIT project (with or without .git at the end), for example:   https://github.com/OpenPuzzlesTest/DocumentsTest  There are 3 additional fields:   * *User Name* – Here should be username entered; * *Password* – Here enter password for the given username; * *Role* – Here can be defined who will be able to work with this source repository. Roles visible here can be defined under *Authorization* tab. If no role is chosen then user which is setting up this source will be able to work with this source repository exclusively; |  |
| SHAREPOINT ONLINE ***Register Add-in***  In initial stage, we have to register the Add-In on SharePoint, where we want to access the information. Follow the steps below to register the Add-In on the SharePoint site.   * Navigate and login to SharePoint online site. * Then navigate to the Register Add-In page by entering the url as:   https://<site>.SharePoint.com/\_layouts/15/appregnew.aspx   * On App Information section, click Generate button next to the Client Id and Client Secret textboxes to generate the respective values; ***Please keep your Client ID and Client Secret because you will need it for setting the source folder inside the app.*** * Enter Add-In Title in Title textbox; * Enter AppDomian as a www.openpuzzles.com; * Enter RedirectUri as a https://www.openpuzzles.com   Click Create button, which registers the add-in and returns the success message with created information.  ***Grant Permissions to Add-in***  Once the Add-In is registered, we have to set the permissions for that add-in to access the SharePoint data. We will set the Read/Write permission level to the web scope, so that we will be able to read the web information:   * Navigate and login to the SharePoint site * Then enter the URL:   https://<site>.sharepoint.com/\_layouts/15/appinv.aspx  in the browser. This will redirect to Grant  permission page;   * Enter the Client ID (which we have generated earlier), in App ID textbox and click Lookup button. That will populate the value to other textboxes in Title, App Domain and Redirect Url; * Now enter the below permission request in XML format (it must have proper syntax without additional characters, or it may display an error):   <AppPermissionRequestsAllowAppOnlyPolicy="true">  <AppPermissionRequest Scope="http://sharepoint/content/sitecollection" Right="FullControl" />  </AppPermissionRequests>   * Then click Create button. This will redirect to you page, where we have to trust the add-in to read items from website;   **Note:** If you want to access site collection or tenant level, the xml should be changed accordingly.  Navigate to the OpenPuzzles website:   * Click on the *Dashboard* and then *Sources* tab; * Click on the “+” button in the right upper corner to create a source;   There are 3 mandatory fields:   * *Type* – Here should be Sharepoint Online source type selected; * *Name* – Give a name to your source repository that will be used throughout the OpenPuzzles application; * *Site name* – Give a full server URL to your Sharepoint server, for example:   https://openpuzzles.sharepoint.com  There are 3 additional fields:   * *Client ID* – Here should be entered client ID gathered during the Add-in registration process; * *Client Secret* – Here should be entered client secret gathered during the Add-in registration process; * *Role* – Here can be defined who will be able to work with this source repository. Roles visible here can be defined under *Authorization* tab. If no role is chosen then user which is setting up this source will be able to work with this source repository exclusively; | ------------------------------------------------------------------------------------------------- |
| CREATE USERS AND USER RIGHTS |  |
| CREATE AUTHORIZATION RULES You are allowed to define user rights in line with your needs. Predefined groups are Admin and User, while you are allowed to create your own:   * Click on the *Authorization* tab; * You can change predefined roles or create new ones by clicking on the “+” button in the right corner in line with your needs;   Role edit explanation:   * In front of the button put a hashtag sign (# or ##) to edit the user rights; if the button does not have any hash tag it is VISIBLE for that authorization group (group of users); * With // sign you can add a comment to the authorization file; * # - button or link is disabled (visible but not clickable); * ## - button or link not visible; |  |
| CREATE NEW USERS AND SET ROLES  * Click on the *Users* tab; * For single user add, click on the “*+*” button in the right corner and input required data; * For *Multiple user import* click on the “*+*” and then on the “*import multiple users*”; You can copy email addresses from the MS Outlook or any other email client “to” field and paste for multiple import option;   ***OpenPuzzles recommendation is that you have 2 Admin users created.***  Change the current user roles:   * On the left side, you will find the “pencil” icon for *Editing*; * If you wish to Remove the current user click on the icon (red “x”) and it will be removed from the system; | 3    ------------------------------------------------------------------------------------------------ |
| TEMPLATE SECTION | |
| Template is allowing users to set into pages, defines styles, fonts, formats and variables for the new document. Application will use template settings as s base for newly created document and reformat you existing documents in line with template formats and styles. | |
| 2.1. USING PREDEFINED TEMPLATE The easiest way of using template is to select already predefined once. After login in application, users are allowed to select available templates. Clicking on template new window with predefined variables will be opened.  Variables like project, customer name, date etc, can be placed in any part of the template. The main purpose is to define variable elements and input it additionally allowing you to use the same template for different clients, situations … Put variable name in brackets to create your customized variables (e.g. [[Client name]]).  Inputting variables and clicking Save will start the main application window.  **NOTE:** You can use variables even in the source documents, not only templates. |  |
| 2.2. CREATE NEW TEMPLATE In order to adapt template to your specific needs, users are allowed to create the new Word template that that can be used in the application:   * Click on *Templates* tab; * Click on *Sample Template* and download the *Sample Template* document ; * Template consists of 4 SECTIONS divided with hash tags; * **Please do NOT change or delete rows marked with the hashtags (green color),** otherwise your template document will not be usable;   Sections (marked with green hashtag labels):   * SECTION 1 - is always visible in the generated document. It consists of the document first page and remaining pages and will be always visible in the generated document. This section cannot be edited by the application and is needed to be defined in the template; * SECTION 2- this section is not visible in OpenPuzzles application and in a generated document. It is used for **defining styles,** of the headings, numbered and unnumbered lists and other elements that will be used in your new document. It cannot be edited in application, just in the template itself; * SECTION 3- this section is visible in the OpenPuzzles application, can be changed in the application Table of Content and/or edited using the application. This is regular content that will be shown in ToC of the application; * SECTION 4 - this section is used to define the last page(s) of the document and it is not editable through the application so it must be defined while creating the template document;   Variables, like project or customer name, can be placed in any part of the document and will be filled out in later steps in the application flow by the user. Put variable name in brackets to create your customized variables (e.g. [[my-variable]]);  **NOTE:** You can use variables even in the source documents, not only templates. | ----------------------------------------------------------------------------------------------- |
| 2.3. UPLOADING AND MANAGING TEMPLATES  * Click on *Templates* tab; * Click on *Upload new template* and the new window will appear; * Choose the predefined folder where the template will be uploaded, then select the template on the local PC and click *Upload*; * If you need more help with the template creation see the section [How to create new template?](#_HOW_TO_CREATE);   Preview, Download and Delete the template:   * Click on *Preview* link below the template name to see the template preview;   Get over the icon by the cursor, the *Download* sign will appear on the left and the “x” sign in the upper right corner to *Delete* the Template and confirm; | 12    - |
| 2.4. START USING THE APPLICATION  * Click on *Templates* tab; * Click on the template document you want to use and click *Create;* * Write in the file name, other variables (predefined in the template or source documents) if exist and click *Save;* * New tab with the name of your document will appear;   Variables (predefined in the template or the source files):   * If you previously configured your template document with variables, you will be able to fill it out before the new document is created; * If you need to change the variables text you already filled in, there is a button in the ToC detail view present (Fields). Click on it to edit or change the variables; | ----------------------------------------------------------------------------------------------- |
| FILL OUT THE CONTENT SECTION | |
| 3.1. THE DOCUMENT CREATION ENVIRONMENT  * After selecting the template and inputting variables (if there are any), main screen with two frames will be opened – SEARCH/EDIT frame (left) and ToC frame (right); * SEARCH/EDIT window shows all your existing documents supported by the application (.docx, .xlsx, .pdf, .jpeg, .png, .txt, .md) and option for [Multidimensional *Search*](#_3.2._SEARCHING_THE)*;* * ToC window shows the Table of Contents of the new document; * By using the application, you can move content from the left side (by drag & drop as “4 arrow sign” or checkbox select with click to button *Add to Toc*) to the right side of the application. By using the second option you have to select in the ToC where do you want to place the document from the left side. Also you can rearrange headings on the right side (ToC) to set them at the order you need (drag & drop option or by using the arrows - “Up” & “Down” for moving headings up or down in the document and ”Left & Right” for changing heading level); * In the upper right corner of the right side there is a button *Fields* where you can change input text of the variables already set; * There is a button *Add a chapter* which allows the user to make new chapter on the right side (ToC frame); * In the down right corner there are two buttons: *Save Work –* to save your work but still not to generatethe docx file and *Generate* – to generated the docx file with the table of content from above; | ---------------------------------------------------------------------------------------------  -------------------------------------------------------------------------------------------- |
| 3.2. SEARCHING THE EXISTING DOCUMENTS  * Click on *Search* field in SEARCH window and enter the word or a phrase you are looking for; * The App offers multidimensional search for the searched “keyword(s)”: * File name results; * Chapter name results; * Content inside paragraphs results;   If you already set up your input folder in *Directories* to *Synch all* then you will be able to see all three sections results, yet if you set up *Synch file names* only you will have only option to see the file names of the documents with the App search); | 1  ----------------------------------------------------------------------------------------------- |
| 3.3. EDITING THE SEARCHED DOCUMENTS OR ITS PARTS AND MOVING TO THE TOC  * Click on *Search* field in SEARCH window and enter the word or a phrase you are looking for; * If you want to move the whole document to ToC just tick the box before the name of that document and click on *Add to ToC* button; * On the right side of the application choose where you want to place the selected part; * If you want to copy/edit only a part of a document click on the searched document and the preview will open: at the beginning of the document for the File Name Results, at the Chapter name with keywords matched for the Chapter Name Results, at the paragraph with the keywords matched for the Content Results; * Once the document is opened on the left side of the screen: * There is a possibility to copy to ToC a part of the document by selecting it and click on a button *Add to ToC*; * *Edit* the selected part of the document and once edited properly click on *Add to ToC*; * Findthe keywords inside the opened document (marked with yellow color); | 1  -------------------------------------------------------------------------------------------------  2  ------------------------------------------------------------------------------------------------ |
| 3.4. MOVING CONTENT FROM THE SOURCE FILES TO THE TOC  * Find the relevant content and move it from left side to ToC, by drag & drop, when “4 arrows” sign apply at the beginning of file name or select checkbox and click to button *Add to Toc* to the right side of the application. By using the second option you have to select in the ToC where do you want to place the document from the left side; * ToC window shows the structure of the document you are creating (heading numbers, levels, paragraphs, figures, tables, etc.;   Options in ToC window:   * Preview the *Document Root* - the whole document before generating, click on the right “pencil” icon; * *Preview* or *Delete a Chapter* - click on a “pencil” icon for preview and the “x” icon for deleting it; * *Move Chapters* and headings in 2 ways: *drag&drop* by holding down the cursor on the name of the chapter or any other part or *clicking the arrows* (up and down for changing chapter level and its order, left and right for changing levels inside one chapter); * The application will move subchapters and content with the selected chapter; * *Add Chapter* button is used for adding the new chapter inside the document at the level which is marked with the orange color; | -------------------------------------------------------------------------------------------------  3  ------------------------------------------------------------------------------------------------- |
| GENERATE SECTION | |
| 4.1. SAVING THE WORK  * On the right side of the application click on the button *Save Work;* * Your document is saved in *My Documents* tab;   Edit the Saved Document:   * Click on the pencil icon to E*dit* the document;   Delete the Saved Document:  Click on the “x” sign to *Delete* the document; | -------------------------------------------------------------------------------------------------  4  ------------------------------------------------------------------------------------------------- |
| 4.2. GENERATING THE NEW DOCUMENT  * On the ToC window click on the button *Generate;* * Edit the *Fields* part will appear only if there are some variables not filled out;   Choose whether you want to *Download* the document, Save it to the *OpenPuzzles Cloud* or any other predefined location*;* If you choose to save it to the Open Puzzles Cloud or some predefined location download icon will be shown in my documents tab next to the document; | -------------------------------------------------------------------------------------------------    ------------------------------------------------------------------------------------------------- |
| GENERAL SECTION | |
| 5.1. INVOICES  * Click on the *Invoices* tab;   There you will find the list of all invoices, with info paid or not paid; | 6  ------------------------------------------------------------------------------------------------- |
| 5.2. CHANGING THE PASSWORD  * On the Home screen click on your account name tab; * Choose *Password Change* option; * New window will appear;   Enter your new password twice and click on *Save;* | 7  ------------------------------------------------------------------------------------------------- |
| 5.3. PROFILE SETTINGS  * Click on *Profile Settings* tab; * Enter your personal information; * Click *Save* to save the changes; | 8  ------------------------------------------------------------------------------------------------- |
| 5.4. GENERAL INFORMATION ABOUT THE ACCOUNT On the right part of the *Dashboard* home screen you will find all information about your chosen package, storage usage, generated documents, users login statistics, etc. | 9  ------------------------------------------------------------------------------------------------- |
| 5.5. OPENPUZZLES SUPPORT  * On the right part of the *Dashboard* home screen you will find the field for contact; * Write the subject, describe the problem and click *Send* to send it to Open Puzzles support team;   This way you have opened support ticket. We will continue correspondence via email to provide you support; | ------------------------------------------------------------------------------------------------- |
| 5.6. CHANGING GENERAL SETTINGS  * Click on the *General Settings* tab; * Change the logo by uploading the new file (226px X 50px); * You can also customize application header color; |  |