SOLUZ.IO

Doma 7.4
User manual

SOLUZ.IO

Document Modification Follow-Up

Date	Author	Modification description / Affected paragraphs
01/09/2023	Kris Steenackers	Document creation

This manual has been compiled with the greatest care.
Comments on this document can always be sent to info@soluz.io.

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The aim of this manual is to provide all necessary user information. It is allowed to copy/paste items of this manual to your own custom user manual.

Content

1 Introduction

The Doma Suite combines DocRoom, a document management system, and Routing, a workflow system.

Both DocRoom and Routing use:

- The same database.
- The same user interface, which can be accessed via a browser (one URL to access both tools)
- A common administrator tool, called the Doma admin module.

The Doma suite is also used as the core of vertical solutions, such as:

- Arco Invoice
- ArchiPol
- ArchiPol+
- Arco Mail Manager
- …

This manual describes all items of the Doma web interface, following the navigation bar of the web interface:

The navigation bar of your Doma web interface can be different from the one mentioned above. Which items are shown, depends on configuration.

Remark:

Custom items can be added to the navigation bar, and others can be hidden.

In the following example, an item "Reports" is added to the navigation bar:

Remark:

1.1 DocRoom – an introduction

DocRoom is a document management system: it is a computer system used to track and store electronic documents and/or images of paper documents, providing storage, versioning, metadata, security, as well as indexing and retrieval capabilities.

What is document management?

Document management is the **process** of **managing documents** and other types of information such as images from creation, review, storage to its dissemination.
It also involves the indexing, storage and retrieval of documents in an organized method.

To be able to do document management, we use a document management system, often combined and integrated with other electronic systems. (e.g. workflow, ERP, …)

As mentioned above, document management involves:

<u>Storage</u>
Store the electronic documents. Storage of the documents often includes management of those same documents; where they are stored, for how long, migration of the documents from one storage media to another (Hierarchical storage management) and eventual document destruction.

<u>Versioning</u>
Versioning is the process of assigning either unique version names or unique version numbers to unique states of documents. Different versions can be kept in the system, with the actual version available in one click.

<u>Metadata</u>
Metadata is typically stored for each document. Metadata may, for example, include the date the document was stored and the identity of the user storing it. The DMS may also extract metadata from the document automatically or prompt the user to add metadata.

<u>Security</u>
Security ensures that data stored in DocRoom and Routing cannot be read or compromised by any individuals without authorization.

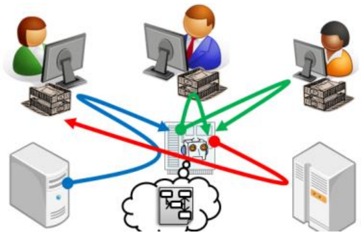
<u>Indexing</u>
Track electronic documents. Indexing may be as simple as keeping track of unique document identifiers; but often it takes a more complex form, providing classification through the documents' metadata or even through word indexes extracted from the documents' contents. Indexing exists mainly to support retrieval. One area of critical importance for rapid retrieval is the creation of an index topology.

<u>Retrieval</u>
Retrieve the electronic documents from the storage. Although the notion of retrieving a document is simple, retrieval in the electronic context can be quite complex and powerful. Simple retrieval of individual documents can be supported by allowing the user to specify the unique document identifier, and having the system use the basic index (or a non-indexed query on its data store) to retrieve the document. More flexible retrieval allows the user to specify partial search terms involving the document identifier and/or parts of the expected metadata. This would typically return a list of documents which match the user’s search terms. Some systems provide the capability to specify a Boolean expression containing multiple keywords or example phrases expected to exist within the documents' contents. The retrieval for this kind of query may be supported by previously built indexes, or may perform more time-consuming searches through the documents' contents to return a list of potentially relevant documents.

1.2 Routing – an introduction

Routing is a workflow management system: it is a computer system used to create, execute and follow-up workflow procedures.

What is workflow?



Workflow is the automation of a business process, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

Workflows are created in a workflow management system, i.e. a system that defines, creates and manages the execution of workflows through the use of software, running on one or more workflow engines, which can interpret the process definition, interact with workflow participants and, where required, invoke the use of IT tools and applications.

In a workflow, an object must follow a predefined route (flow). A predefined route is called a ***Procedure.*** A procedure is built out of several **steps**. Each step represents a certain moment in the procedure.

- *A **procedure** is not a DocRoom object, which means that a procedure case will not automatically be stored in DocRoom when it's not active anymore.*

- A *Procedure* has its own
  - ***Properties*** (fields)
  - ***Packages*** *(document placeholder)*

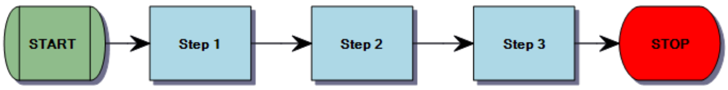
Routing can be used for

- **Document oriented workflow**
  - Create/update/delete a document by using a workflow
  - Document retrievable in DocRoom from procedure start
  - Document runs through a procedure before being published as a document

- **Process oriented workflow -** *Define your business process in Routing*
  - Automation of certain steps
  - Easy follow-up using workflow search screens
  - Reporting using external reporting tools

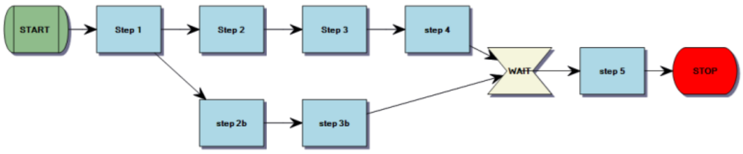
1.2.1 Procedure design

1. Sequential flow



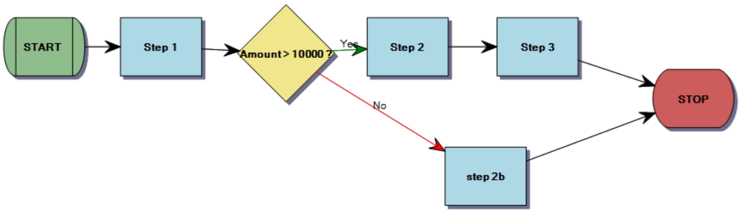
The most straight-forward way of building a procedure: go from the first step to the second, to the third, etc.

2. Parallel flow



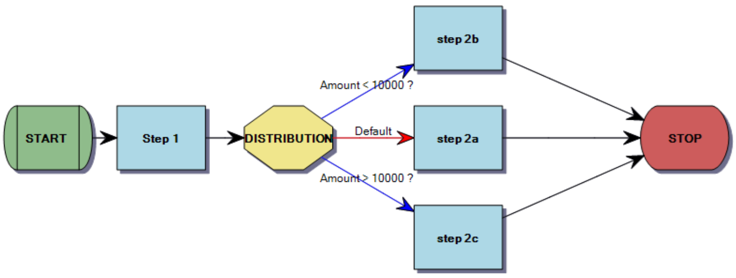
A parallel flow starts from one step, but then splits at a certain moment into 2 or more branches. The different branches are run separately, though they can re-unite if necessary. If they re-unite, a wait step assures that all data of all branches are gathered before the flow will continue.

3. Conditional branching



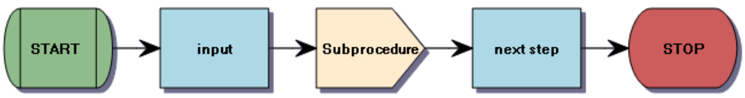
Conditional branching allows you to go either one way or the other with the procedure. Based upon a Boolean condition (yes/no), you will continue the flow in the selected direction.

4. Distribution

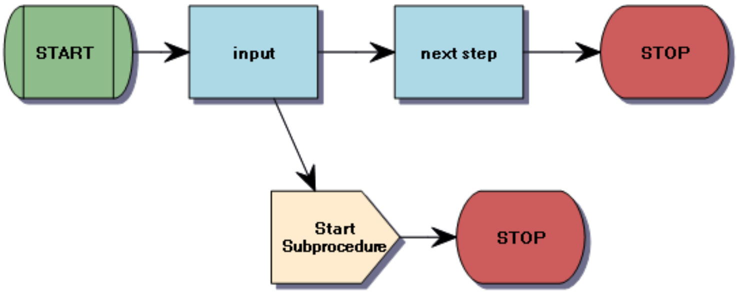


Often, conditional branching is not enough: e.g. what if more than 2 options can be chosen to continue. Or possibly the condition must continue in several directions. For this purpose, you can use the distribution step. The condition is no longer Boolean, and it is located on the arrow that leaves the distribution step to guarantee maximum flexibility.

5. Sub procedures



A sub procedure can be started from within a procedure. This sub procedure can be a part of the complete procedure, as shown in the above example. The step Sub procedure will start the sub procedure, which runs through the complete sub procedure before it returns to the next step of the main procedure.



A sub procedure step can also trigger (start) a sub procedure, which then will proceed as an individual procedure. When the sub procedure has been started, the main procedure will immediately continue to the next step of the procedure.

6. Automation

Certain steps, in which user interaction is not necessary, can also be automated. Automatic steps allow automated connections with other software products, e.g. for exchange of data, automatic generation of a letter, based upon pre-defined temples, etc.

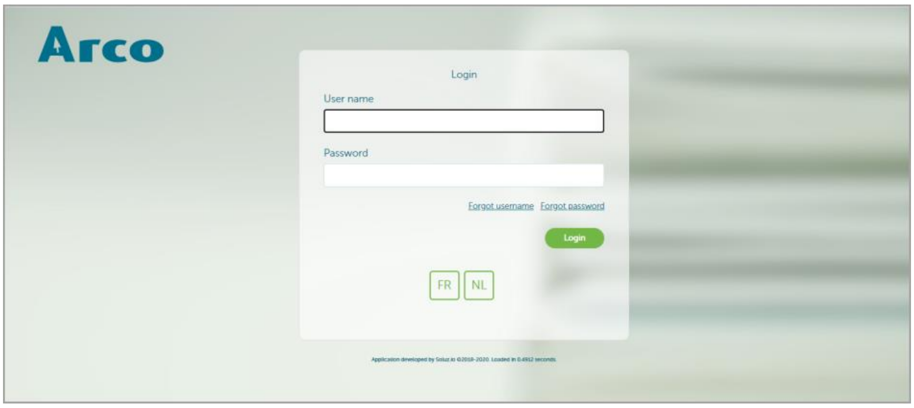
1.3 Doma tools

Tool	Description
Web interface	Default way to connect to Doma. All you need is a browser (Internet Explorer or Firefox) and the URL to access Doma.
Doma Explorer	Client tool that must be installed on the user's PC. Allows you to upload files to Doma in an easy way, by dragging and dropping them.
Doma Office add-ins	Tools implemented in MS Outlook, Word, PowerPoint and Excel. Allows the user to upload items directly from MS Outlook, Word, PowerPoint or Excel by clicking on the save to DocRoom button.
Doma admin module	Administrator tool to configure Doma. By default, installed on the server. Client-server application.

2 Login/Logoff

2.1 Login

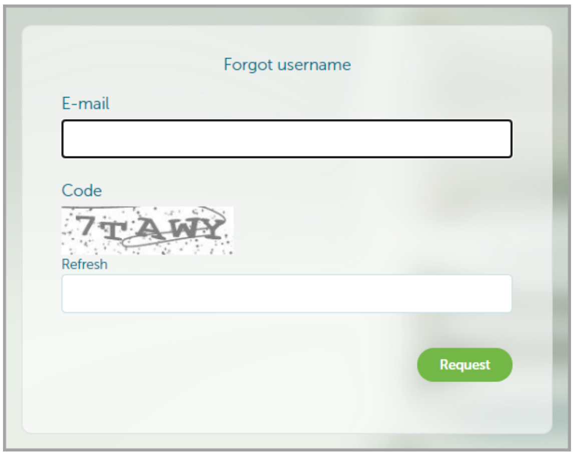
Open the browser and enter the URL of the Doma application.
When your user is synchronized, the system will automatically recognize your windows user and will give you immediate access.
If not, the logon screen will appear:



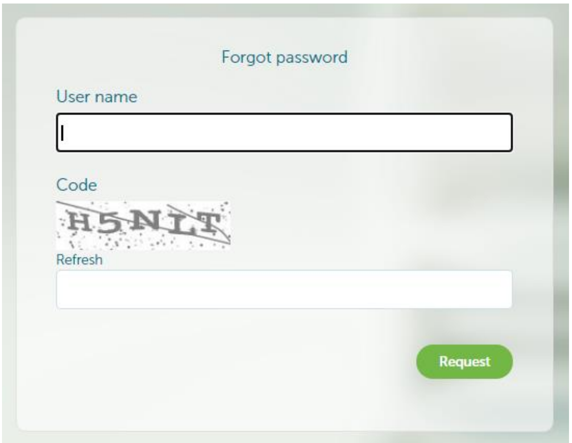
Enter username and password and click on the ***Login*** button.

7. Click on FR or NL to change the language of the interface to French (FR) or Dutch (NL).

8. If you have forgotten your user name, click on the link *Forgot username*.
   A new window appears in which you must enter your e-mail address and a captcha.
   Click on the button ***Request*** to send the request.



9. If you have forgotten your password, click on the link *Forgot password*.
   A new window appears in which you must enter your username and a captcha.
   Click on the button ***Request*** to send the request.



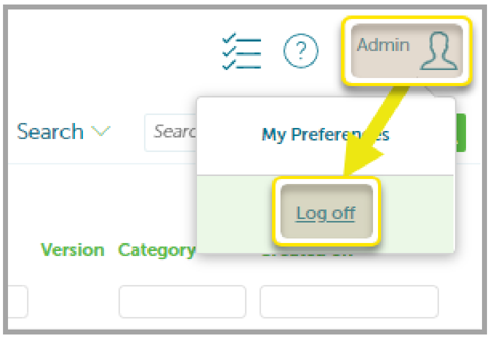
2.2 Log Off

Avatar	**When clicked upon the next items are available:** **1. Link to the My Preferences screen.** **2. Log off option** **3. Link to the help files**

Click on the avatar icon in the right upper corner to show the logoff button.

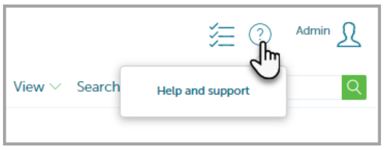
When clicked upon the next items are available:

4. Link to the My Preferences screen
5. Log off option



Click the **Log off** button.

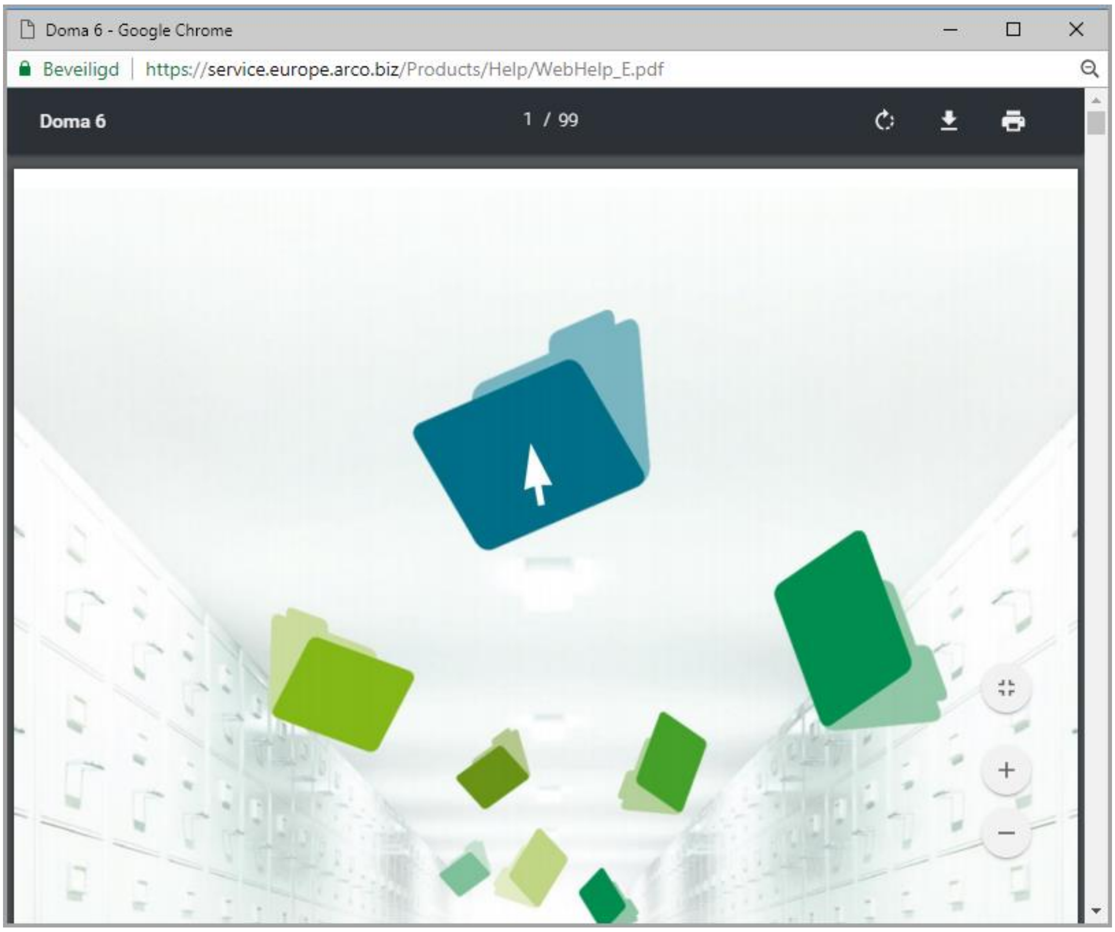
3 Help



The Doma help button allows you to open the User Manual in pdf. It is located in the right part of the navigation bar.

Click on the help icon to open the Help and support overview. Click here to open the Doma user manual.
If available, the manual will appear in the language selected in your user profile.

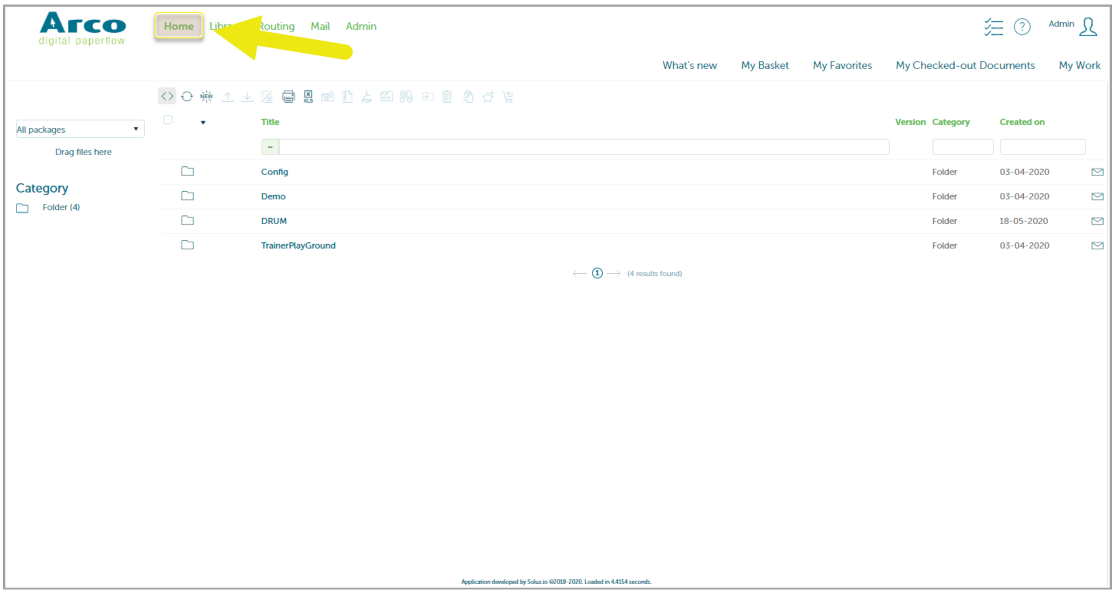
The Doma user manual will appear in a pop-up window:



4 Home

The Home button opens a home screen that contains a direct access to DocRoom and a number of pre-defined links to other items.

Often, this button is not shown to the users.



When *Home* is selected, the next menu is available:

Button	Action
What's new	Opens the DocRoom list *What's new*. Remark: This list is also available from the Library screen.
My Basket	Opens the DocRoom list *My Basket*. Remark: This list is also available from the Library screen.
My Favorites	Opens the DocRoom list *My Favorites*. Remark: This list is also available from the Library screen.
My Checked-out Documents	Opens the DocRoom list *My Checked-out documents*. Remark: This list is also available from the Library screen.
My Work	Opens the Routing list *What's new*. Remark: This list is also available from the Library screen and from the Routing screen.

5 Library (DocRoom)

5.1 Start screen

5.1.1 Library (DocRoom)

When a user selects the option *Library* in the navigation bar, the DocRoom start page is shown. By default, the root folder is selected and its content is shown.

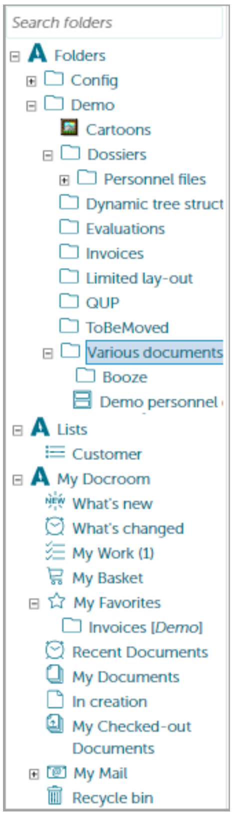
The start page consists of the next parts:

	Item	Description
1	**Navigation bar**	Allows you to browse to the main parts of the DocRoom application.
2	**Breadcrumbs**	Show you in which folder you are browsing. The last folder in the row is the current folder.
3	**Tree Structure**	Organizes DocRoom documents and Routing dossiers in a hierarchical folder structure.
4	**Menu bar** and **Global search field**	Shows a list of actions that can be executed within the context of the current folder (which is indicated in the breadcrumbs). Allows you to do a global search in the selected DocRoom folder.
5	**Result screen**	
5a	**Side panel**	The side panel consists of pre-defined filters (also called groupers). Click on one of the items to filter only the selected items in the result list.
5b	**Result list toolbar**	Toolbar with buttons that launch actions on the items selected in the toolbar.
5c	**Result list header**	Header that shows column names. With a right-click, you can show/hide columns and activate filters or groupers.
5d	**Folder bar**	Bar in which the details of a folder are represented in columns.
5e	**Dossier bar**	Bar in which the details of a dossier are represented in columns.
5f	**Document bar**	Bar in which the details of a document are represented in columns.
5g	**Workflow bar**	Bar in which the details of a workflow are represented in columns.

5.2 Description of the main items of DocRoom

5.2.1 The tree structure

The DocRoom tree structure is a hierarchical classification tool for all DocRoom items.
It allows users to browse to a certain item in the system and allows administrator to put security on folders and items of the tree structure.



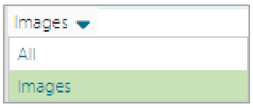
The folder structure contains 2 main parts:

1. **Folders** The tree structure in which all items are categorized.
2. **My DocRoom** Your personal DocRoom part with a number of specific items in it.

A search field is located above the tree structure.
This field allows you to filter in the folders part.

- When entering a (part) of a folder name in this search field, only folders with that (part) of the name will be shown in the tree.
- Clear the field to show all folders again.

5.2.1.1 Tree structure filter



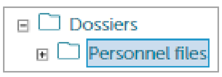
It is possible that there is a button next to the search field of the tree structure.
Click on it to open the pre-defined filter options.
In the example, it is possible to filter on folders or dossiers in the tree structure. Click on an item in the list to activate the pre-defined filter.

5.2.1.2 Folders

The folders part of the tree structure is a hierarchical classification structure for all DocRoom items. The structure behaves like a window folder structure:

- Click on a folder name to view the folder content.
- Right-click on a folder to show a menu with options for the folder.
- Click on the ⊞ icon next to a folder to view all its subfolders.
- Click on the ⊟ icon next to a folder to collapse the folder.

Default folder icon: (Folder icons can differ: each folder category can have its own icon.)



The selected folder is marked by a blue rectangle.

5.2.1.2.1 Dynamic folders

Sometimes, the tree structure does not organize the DocRoom content the way you would like to organize it.

In that case, you can reorganize the tree structure using a ***dynamic folder***.

A dynamic folder can be created by a user.

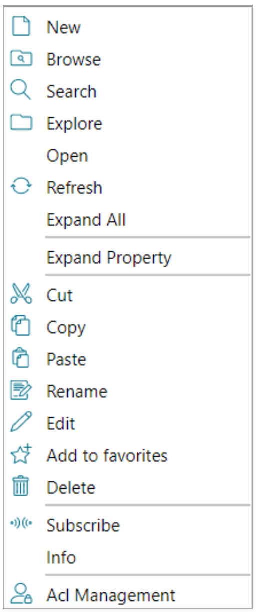
There are 2 kinds of dynamic folders:

a. **Property expansion**: creation of a folder structure based upon the value of a *property*. Per vale found in the selected property, a folder will be created. In this folder, all documents with this value will be shown.

b. **Saved query in the tree**: a saved query can be put in the tree structure. From that moment, it reacts as a folder.
When a user clicks on the saved query folder in the tree, the saved query is executed. The result of the saved query is the content of the folder.

Dynamic folders thus allow users to create their own tree structure. Depending upon security settings, these personally created folders can also be shown to other users.

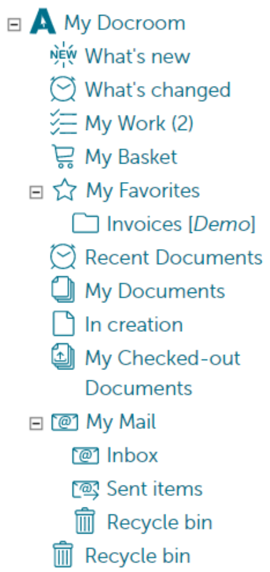
5.2.1.2.2 Possible right-click menu options



No.	Item	Description
1	**New**	Add a new item to the selected folder.
2	**Browse**	View the content of the selected folder.
3	**Search**	Start the search window of the folder to search in it.
4	**Explore**	Open this folder in a new frame, so you can expand the selected folder without losing overview.
5	**Open**	Show folder properties in read only.
6	**Refresh**	Refreshes the selected folder. *(Not shown in the screenshot)*
7	**Expand all**	Unfold all subfolders of the selected folder.
8	**Expand property**	Add a property expansion to the selected folder. Property expansions are dynamically generated subfolders which are created based upon the values of a property.
9	**Cut**	Cut the selected folder.
10	**Copy**	Copy the selected folder.
11	**Paste**	Paste the selected folder.
12	**Rename**	Rename the selected folder.
13	**Edit**	Open the folder properties in edit mode so you can make changes immediately.
13	**Add to favorites**	Add this folder to your favourites folder.
14	**Delete**	Deletes the selected folder.
15	**Subscribe**	Subscribe to the selected folder so you receive an email from the moment new items have been added to the folder.
16	**Info**	Opens a window with more technical information about the folder. (Category, name, ID, folder location, number of documents, created on, created by, last modified on, last modified by)
17	**ACL Management**	Opens the Access Control List. From here you can manage the folder security.

5.2.1.3 My DocRoom

Not all items that are described in this manual will be visual for you. What you see depends on configuration.



No.	Item	Description
1	**What's new**	In *What's new* you can find a list of all new documents/folders that were added to DocRoom. By using a calendar, you can select a specific date or a time rate.
2	**What's changed**	Shows a list of all items that were modified in DocRoom.
3	**My Work**	Shows your Routing work list.
4	**My Basket**	Shows the documents you have selected in the *Basket*. The Basket is a selection tool that is used to group documents to do a certain action on them. E.g. you can group the documents from two different queries to restore them.
5	**My Favorites**	Shows the documents you have selected as your favourite documents. In the Favourites list you can group often used documents. You can also change the label of your favourite folders. (Right-click on the favourite folder, then select *change label*)
6	**Recent documents**	Shows the last 60 documents opened by your user.
7	**My documents**	This shows your personal folder. The first time you log on to the system, a personal folder with your username is created. In this folder, you can store your personal documents. Only your user has access to these documents.
8	**In creation**	This list shows all DocRoom items that were created by you and which are still in creation. DocRoom items in creation are only visible for the DocRoom user who created these items.
9	**My checked-out documents**	This is the list of the documents you have checked-out. Documents can be checked-out to change the document and create a new version. In this folder, you can also find documents with a checked-out file.
10	**My Mail - inbox**	Contains all DocRoom messages that were sent to you.
11	**My Mail - Sent items**	Contains all DocRoom messages that have been sent by your user.
12	**My Mail - Recycle bin**	Contains all the DocRoom messages that you removed.
13	**Recycle bin**	The *Recycle Bin* contains all deleted documents/folders. Click on *Empty Recycle bin* to remove these items from the Recycle bin. It is also possible to restore the items in the Recycle bin by right-clicking on the item and selecting the option ***Restore***.

Nice to know

Each user can decide not to show the tree structure in the Web interface.
This can be configured by selecting this option in your preferences.

- Your preferences can be shown by clicking on your username in the green navigation bar. Open the item preferences. There, uncheck the item *General-Show the tree structure*.

5.2.2 Result screen

5.2.2.1 Introduction

The result screen appears when a user clicks on a folder or when a query is executed.

Different result screens can be used.

A first default result screen is configured for all browse actions.

A second result screen is configured for all search actions.

Next to these two default result screens, application administrators can define specific result screens for DocRoom folders or queries.

5.2.2.2 Example of default lay-out for a result list when browsing the tree structure

When browsing, the tree structure and the breadcrumbs show which folder is currently selected.

The Result list can consist out of the next parts:

- **(1) Grouper(s)** - allow you to filter the result list on pre-defined criteria; some groupers are shown by default, other can be shown/hidden by the user (depending on configuration).
- **(2) Result list toolbar** - here you can select an action that will be executed on the selected items in the result list.
- **(3) Result list header** - the list header shows the column names and columns filters. Re-order your result list with a left mouse click on a column name. Change filter, groupers view or columns view with a right click on the list header.
- **(4) Folder bar** - shows information about the folder and icons to do pre-defined actions on the folder.
- **(5) Dossier bar** - shows information about the dossier and icons to do pre-defined actions on the dossier.
- **(6) Archived Routing workflow bar** - shows information about the Routing workflow and icons to do pre-defined actions on the Routing workflow.
- **(7) Routing Workflow Bar** - shows information about the Routing workflow and icons to do pre-defined actions on the Routing workflow.

- **(8) <u>Document bar with several linked files</u>** - shows information about the document and icons to do pre-defined actions on the document.
- **(9) <u>Document bar with one linked file</u>** - shows information about the document and icons to do pre-defined actions on the document.
- **(10) <u>List navigation and number of results</u>** - Shows how many items are in this result list and navigation buttons to go to previous/next pages of the list.

5.2.2.3 Example of default lay-out for a result list after a query

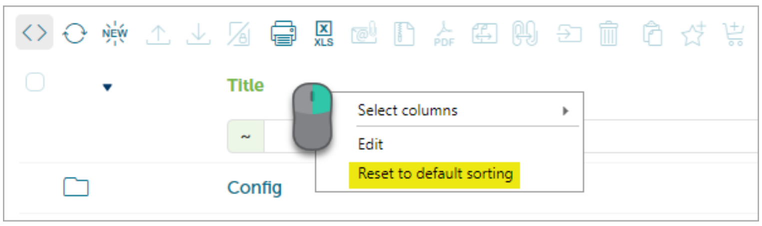
The result list for a query is nearly the same as the result list when browsing, but also mentions what has been searched for in a frame at the same location as the groupers (**1**). Next to that, an option to return to the search screen is added in the right lower corner of the result list (**2**).
If activated, the words you were looking for are highlighted in the result.

5.2.2.4 Main actions on items in the result list

- **Left mouse click** on the document bar open the document in a preview pane at the right of the window.
- **Right mouse click** on the document bar opens a menu with options for the document: do this to do an action on the document.
- **Double mouse click** on the document bar opens the document in a pop-up window, showing all document properties and a preview of the main file.

5.2.2.5 Order your own result list

The appearance of the result list can be influenced by each user.
When you change the default sorting of your list, the change will be saved for your user.
Right-click in the header and select the option ***Reset to default sorting*** to reset.



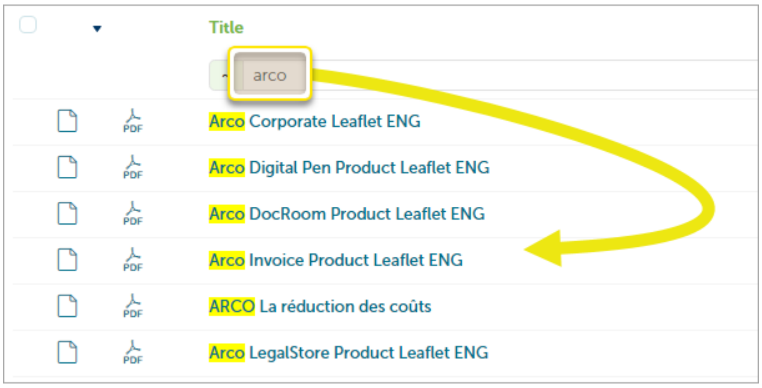
Possibilities for changing the appearance of your result list:

5.2.2.5.1 Order your result list alphabetically

Click on the column header of the column that you want to order alphabetically; click again to reverse the order:

5.2.2.5.2 filter on values of a certain column

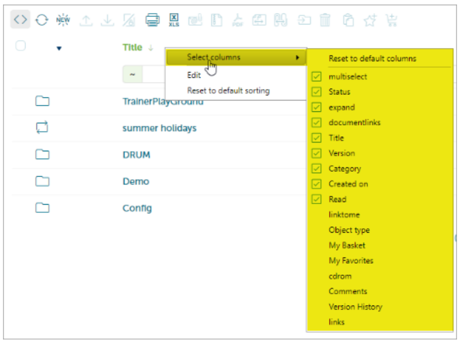
Above certain columns of the result list, you can find a filter. Here you can enter a (part of a word) on which the result list will be filtered: only documents with this (part of the) word will appear in the result list.



5.2.2.5.3 show/hide certain columns of the result list

Put the cursor somewhere on the column header.

Click on the right mouse button. A menu appears: select the option Select Columns.



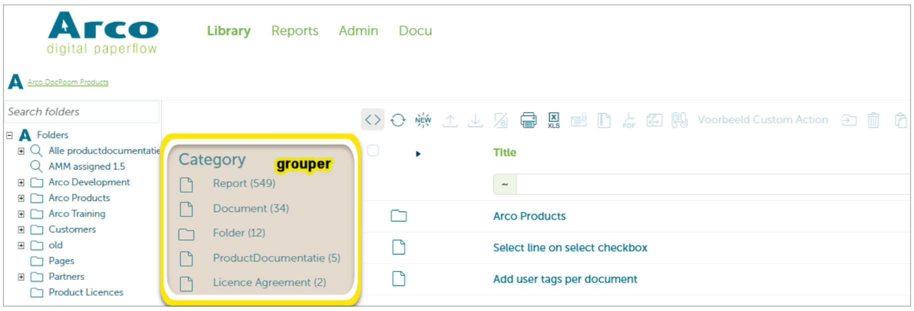
Click on the column name to hide the column. (No icon is shown).

Click on the column name to show the column. (The icon ☑ is set in front of the column name).

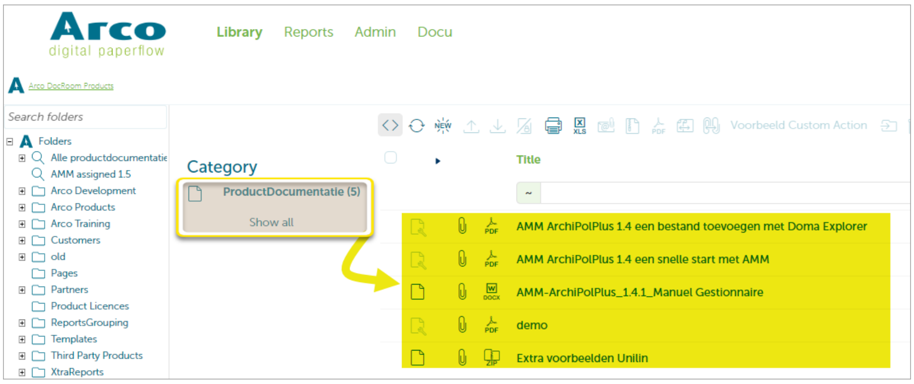
Click on the option ***Reset to default columns*** to return to the default column selection.

5.2.2.5.4 use a grouper to regroup the result list

By default, a grouper is active in most result screens. In most configurations, this grouper is pre-defined and cannot be chosen by the users.

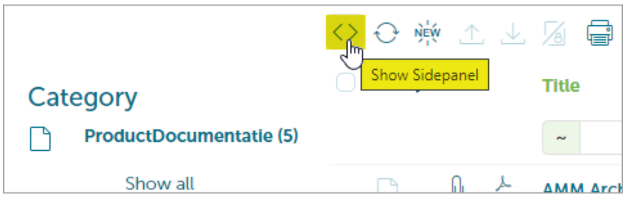


Click on an item in the grouper to filter only those items in the result list:



Click on the option **Show all** to end the filtering.

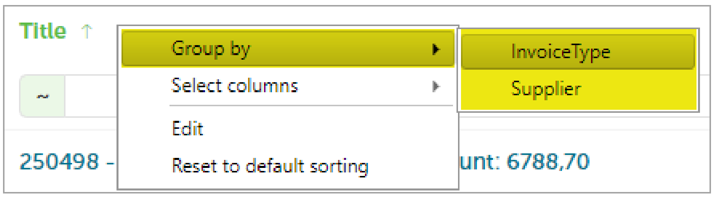
The toolbar button ***Show Side panel*** allows you to show/hide the grouper:



When users are allowed to select groupers, then can do so as described below.

Put the cursor somewhere on the column header:

Click on the right mouse button. A menu appears: select the option Group by.

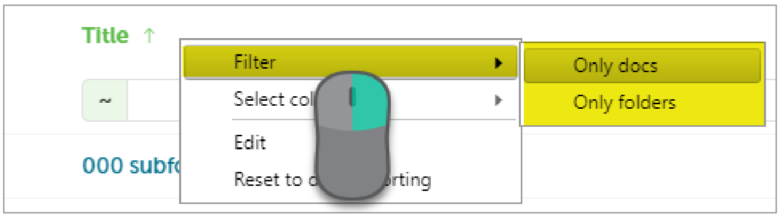


Click on the name of the grouper to activate. The icon ☑ is set in front of the grouper to indicate that it is active.
Click on the grouper to de-select.

As a result, the grouper appears in the left part of the result window. The result list that is shown can now be filtered on the items mentioned at the left part of the screen.
Click on one of the items in the grouper list to filter only those documents that correspond to this grouper.
Click on the option **Show all** under the groupers list to clear your selection.

5.2.2.5.5 Use pre-defined filters

You can filter a result list using pre-defined filters.
Put the cursor in the header of the result list.
Click on the right mouse button. A menu appears: select the option ***Filter.***



Click on the name of the filter to activate.
The icon ☑ is set in front of the filter to indicate that it is active.
Click on the filter to de-select the filter.
As a result, the result list is immediately filtered as defined. E.g. only documents are shown.

> Remark
>
> *It is possible that you are not allowed to change the view of the result list. If so, you won't have to possibility to make changes when you click on the right mouse button in the list header.*

5.2.2.6 Result list items

5.2.2.6.1 Document bar

5.2.2.6.1.1 In general

When browsing to a folder or when searching, a result list will appear.
This result list consists of several documents/folders/dossiers/Routing workflows.
Each document/folder/dossier/Routing workflow is represented by a bar.

Each Document bar consists of a set of icons and text that give more information about the document and the files linked to it.

- The upper row shows the information about the document and the main file that is attached to it.
- The (shorter) rows under the first row show the other files attached to the document.

Each user can adapt the view of the result list (and thus of the document bar) in his/her web interface (if allowed in the configuration).

5.2.2.6.1.2 Views

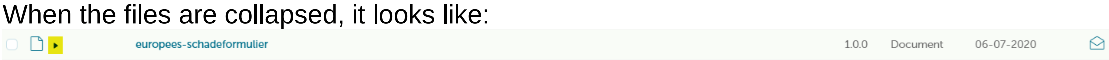
By default, the user will see a document bar that looks like the next example:

- **Document with no file attached:**

- **Document with one file attached:**

- **Document with 3 files attached: the files appear as lines under the document information:**

When the files are collapsed, it looks like:



5.2.2.6.1.3 Actions

- Click on the document title to open the document detail in the right frame.
- Double-click on the document title to open the document detail in a pop-up window.
- By right-clicking on the document title you can view the different document actions.
- By right-clicking on a file name you can view the different file actions.

5.2.2.6.1.4 Document detail

A document detail can appear in 2 different ways:
1. As a pane opening on the right side of the result list (one left mouse click on document title)
2. As a pop-up window (double-click on the left mouse button on document title)

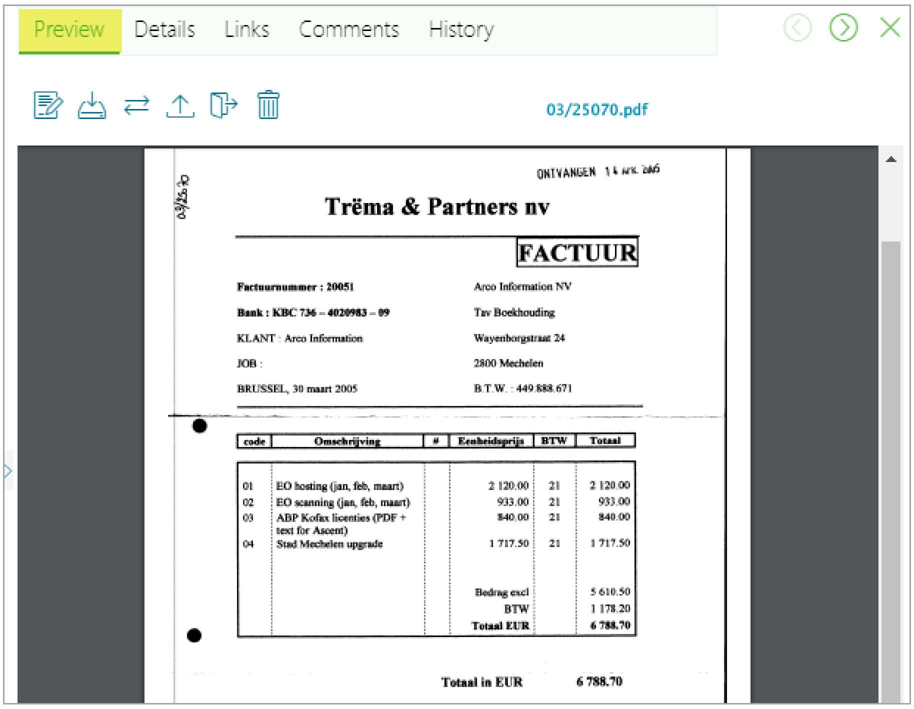
5.2.2.6.1.4.1 Document detail - left mouse click

Description of the document detail appearing in the right pane.

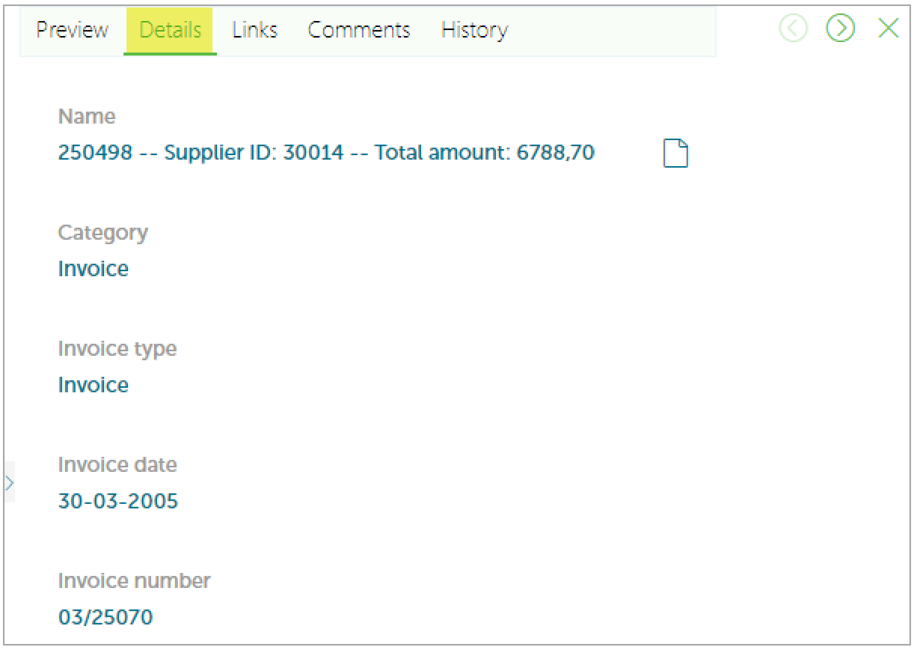
Depending upon user rights and application configuration, the right frame will show a list of tabs.

By default, the next tabs are shown:

Preview: preview of the main file
(example)

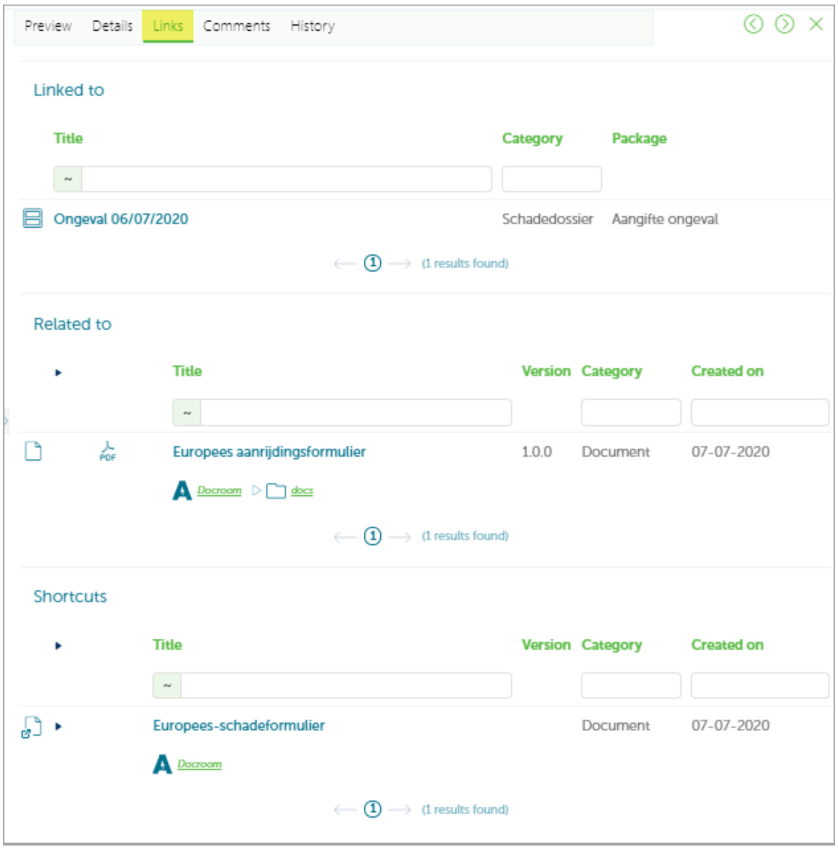


Details: all metadata of the document and a list of all files linked to the document (example)

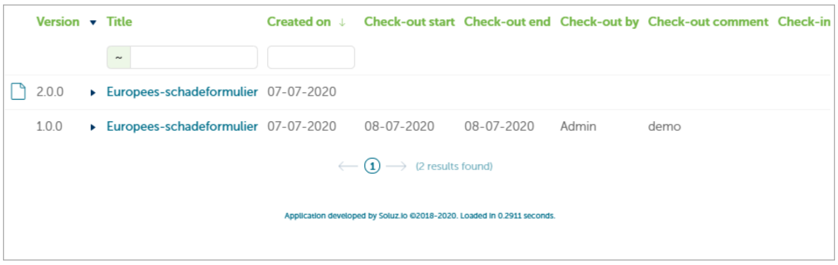


Links: list of linked items:
(example)

- **Linked to**: shows the packages of other objects to which the object has been added
- **Related to**: shows the objects where the object is linked to by using the manual link possibility
- **Shortcuts**: shows the shortcuts to the object.

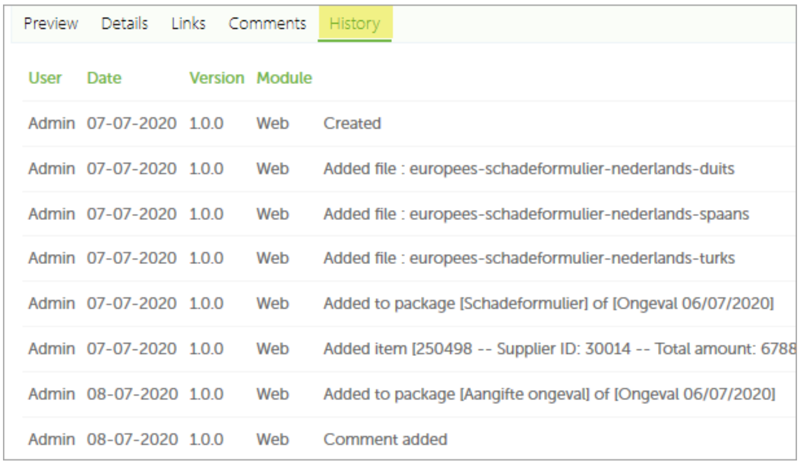


Version History: all previous versions of the document and its files (example)



Comments: list of comments for this document + the possibility to enter new comments (example)

History: list of all actions done on the document and its files (example)



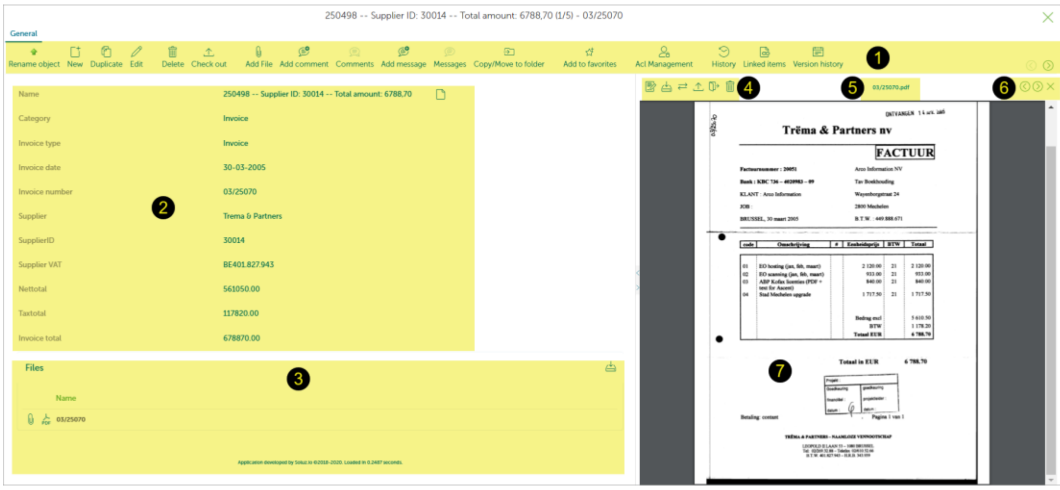
Preview | Details | Links | Comments | History

User	Date	Version	Module	
Admin	07-07-2020	1.0.0	Web	Created
Admin	07-07-2020	1.0.0	Web	Added file : europees-schadeformulier-nederlands-duits
Admin	07-07-2020	1.0.0	Web	Added file : europees-schadeformulier-nederlands-spaans
Admin	07-07-2020	1.0.0	Web	Added file : europees-schadeformulier-nederlands-turks
Admin	07-07-2020	1.0.0	Web	Added to package [Schadeformulier] of [Ongeval 06/07/2020]
Admin	07-07-2020	1.0.0	Web	Added item [250498 -- Supplier ID: 30014 -- Total amount: 6788
Admin	08-07-2020	1.0.0	Web	Added to package [Aangifte ongeval] of [Ongeval 06/07/2020]
Admin	08-07-2020	1.0.0	Web	Comment added

5.2.2.6.1.4.2 Document detail – double click

Description of the document detail in pop-up modus.

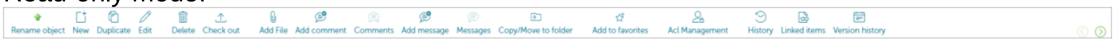
When appearing in pop-up modus, the document detail will show both metadata and a preview of the main file.



	Item	Description
1	**Document toolbar**	The toolbar contains several buttons that allow actions on the document.
2	**Document properties**	The properties show all items that allow you to find the document.
3	**Document files**	All files that are linked to the document. The main file is shown in bold. This is the file that is opened by default in the preview at the right.
4	**File toolbar**	The toolbar contains several buttons that allow actions on the file in the preview.
5	**File title**	Title of the file in preview.
6	**Navigation buttons and close button**	Buttons that allow the user to browse to the next file of the document. The close button will close the file preview.
7	**File preview**	Preview of the file selected in the file list of the document.

Document toolbar
The document toolbar of the pop-up window contains the next buttons:

Read-only mode:



Edit mode:

Overview and description of all icons of the document toolbar:

Icon	Name	Description
Rename object	**Rename object**	Give another name to the object.
New	**New**	Create a new document without closing the pop-up window that shows the document detail.
Duplicate	**Duplicate**	Duplicate the actual document. A new document with the same properties but without files will be created. The properties appear in edit, so you can immediately make your changes on the copy. The document is the same as the original name but starts with *copy of*.
Edit	**Edit**	Opens the document properties in edit mode, which allows you to make changes to the document properties. When you edit a document without a check-out, you cannot change the version number or keep the previous version of the document.
Save	**Save**	Save changes.
Save and edit next	**Save and edit next**	Save, close current document and edit next document in the result list.
Cancel	**Cancel**	Cancel the changes you made that were not yet saved.
Delete	**Delete**	Move the document to the recycle bin. The recycle bin can be found in the Personal folders of the Tree Structure.
Check out	**Check out**	Check out the document. This allows you to create a new version. Checked-out icon for other users: Checked-out icon for the user who did the check-out:
Add File	**Add file**	Opens a pop-up window from where you can add a file to the document.
Add comment	**Add comment**	Opens a pop-up window in which you can enter new comments for the document.
Comments	**Comments**	Opens the comments tab in the preview window on the right., which gives an overview of all existing comments and the possibility to add a comment. When comments are added, the comments icon will be .
Add message	**Add message**	Opens a pop-up window from where you can send an internal or external message.
Messages	**Messages**	Opens the overview of the messages related to this document.
Copy/Move to folder	**Copy/Move to folder**	Opens a pop-up window from where you can copy/move the current document or create a shortcut to it.
Add to favorites	**Add to favourites**	Add the document to your Favourites.

Remove from favorites	**Remove from favourites**	Remove the document from your Favourites.
Acl Management	**ACL Management**	View and set the security of the document.
History	**History**	Opens an overview of the document history in the preview window at the right.
Linked items	**Linked items**	Opens an overview of all items linked to this document.
Version history	**Version history**	Shows the version history of the document in the preview window at the right.
	Previous	Shows the next document.
	Next	Shows the previous document.

Preview tabs and close button
See below

File toolbar

The file toolbar of the pop-up window contains the next buttons:

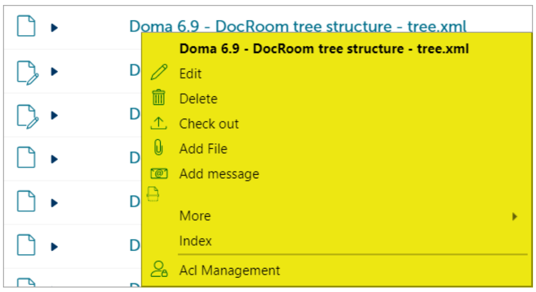
Overview and description of all icons of the file toolbar:

Icon	Name	Description
	Edit properties	Opens a pop-up screen in which you can rename the current file.
	Download	Opens a file download screen from where you can download the current file.
	Replace file	Opens a pop-up window from where you can upload a file to replace the current file as the same version or as a new (sub)version.
	Check out	Checks-out the current file and opens it to edit.
	Delete	Deletes the file. Before deletion, a confirmation screen appears. (This option is not available for all users)

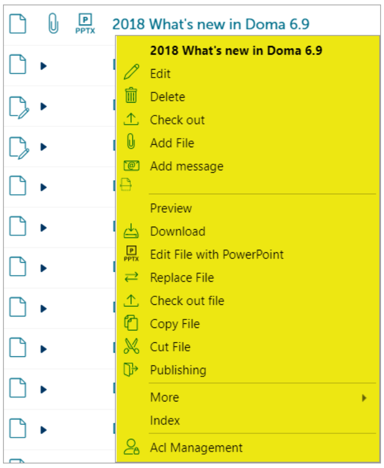
5.2.2.6.1.4.3 Document actions menu

By right-clicking on a document bar you can choose between different document actions in a menu.

Context menu for a document with none, 2 or more files.



Context menu for a document with one file.



Which actions are available is configured by your application administrator.

Overview of the items in the document actions menu (context menu):

Action	Description
Document name	Appears in bold above the list of actions; by clicking on this name, the preview pane is opened at the right side of the screen.
Edit	Via the ***Edit*** button, you can change the document. When you edit a document without a check-out, the version number will be changed automatically (v. 1.0.0 becomes 1.0.1); you cannot keep the previous version of the document.
Delete	Clicking on this option will delete the document. A confirmation screen will appear. The deleted documents will appear in the Recycle bin. Via the Recycle bin you can restore the document or delete it permanently.
Check-out	If you choose this option, the document will be checked-out so you can edit the document and create a new version. Previous versions of the document will be available for other users. You can find your checked-out documents in the Personal folder *My Checked-out Documents*.
Unlock	This unlocks the document when it is locked by another user. When a document is Locked it means that another user is editing the document. This action only appears if the document is locked and you have enough rights to unlock it.
Add File	This option offers you the possibility to add a file to the current document.
Add message	Will add a message to the document.
Scan File	Allows the user to scan a file from a scanner linked to the PC via USB.
Preview	Opens the preview pane at the right side.
Download	Will download the file.
Replace File	Will open a new window in which you can add a new file that will replace the old one.
Check out file	Will check out the file so that other users know that you are working on it.
Check in file	Will open a new window to check in the file.
Cancel check out file	Cancels the file check out. Changes to the file will not be saved.
Copy File	Will copy the file so that it can be pasted to another document.
Cut File	Will cut the file to copy it to another document.
Publishing	Will open a new window to configure a direct URL to the file.
Send by Email	Via this option you can send the document by Email.
View Previous File Versions	By choosing this option, the previous versions of the file will be shown.
Subscribe	Allows you to subscribe to this document.
ACL Management	Via this option, you can change the security setting of this document.
Index	Shows the index that is created for the file.
More or Custom action	*Your application administrator can add one or more custom actions. These actions will trigger an event that is defined by your application administrator.* *The name of these actions is defined by the application administrator. If you see actions with a name not listed here, please refer to your application administrator for more information.*

5.3 How to search

5.3.1 Introduction

Next to the possibility of browsing to a document using the DocRoom tree structure, users can also search items in DocRoom. To search, users can search globally, using the global search field, or they can use a more specific search screen.

5.3.2 Global search

The global search window is available in the right upper corner of the Doma Web interface, next to the menu buttons.

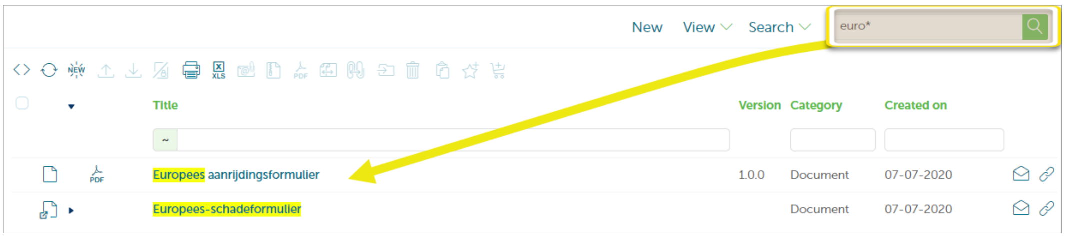
First select the folder where you want to search in the tree structure.
Select the root folder (Folders in the example above) to search in all folders of the tree structure.

Enter the word(s) you are looking for in the global search screen and press the [Enter] key or click on the magnifying glass icon next to the global search field to start the search.

The executed query searches:

- In all metadata of the DocRoom items
- In the full text of the files attached to the documents

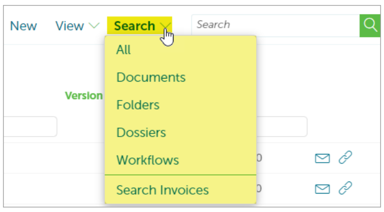
The search result appears in a list, with highlighting of the searched word(s):



It is possible to use search operators in the global search field. See chapter ***Wildcards*** (Search operators.)

5.3.3 Search using the search menu: search screens

Next to the global search, users can also open a specific search screen by selecting one of the screens in the search menu.



By default, the next screens are available:

- All
- Documents
- Folders
- Dossiers
- Workflows

When custom search screens are available, they will appear under the default search screens. (e.g. the search screen ***Search Invoices*** in the example.)

Click on a search screen name in the menu to open the search screen.

5.3.3.1 Search screen buttons

By default, the search screens contain 4 buttons:

Button	Description
Find	Executes the search.
Count	Counts how many items will be found. The count result replaces the search screen name in the upper left corner.
Save	Will save your search criteria as a preset that can be executed with one click. See chapter Saved queries.
Open	Opens the saved queries overview. See chapter Saved queries.

5.3.3.2 All

Searches on all Doma items: documents, folders, workflows and dossiers.

5.3.3.3 Documents

Only searches on DocRoom documents.

5.3.3.4 Folders

Only searches on DocRoom folders.

5.3.3.5 Dossiers

Only searches on DocRoom dossiers.

5.3.3.6 Workflows

Only searches on workflows.

5.3.3.7 Custom search screens

Administrators can configure specific search screens for a user group.
These screens can have a more intuitive look and feel than the search screens that are available by default.

Custom search screens can be opened from the search menu. The application administrator can also link them to specific folders in the tree.

5.3.4 Wildcards (Search operators)

Wildcard	Description	Example
% or *	Substitution characters replacing a sequence of zero or more letters.	Bruss%, Bruss*
_ (underscore)	Substitution characters replacing exactly one letter.	Brussel_

<space> or AND	Indicates a search on documents containing all the terms joined by the operator.	Namur Bruxelles Namur and Bruxelles
OR	Indicates a search on documents containing one of the terms joined by the operator.	Namur OR Bruxelles
- (hyphen) or NOT	Character used for the expression NOT. *If no space is put before and after the hyphen, it is considered as a letter.* If a space is put before and after the hyphen, all words following the hyphen will be excluded when searching: the items mentioned after the hyphen are excluded from the search result.	gin-tonic = search for the cocktail gin [space] – [space] tonic= search for the word gin but the word tonic is not allowed in the result list.
" " (quotes)	Indicates a search on documents containing the sentence enclosed in the operators.	"Namur et Bruxelles"

Date Search Operator	Description	Example
Date	Indicates a search on documents of a specific date.	10-2-08 10-2-2008 10-02-08 10-02-2008 10/02/2008 10/02/08 10/2/08 10/2/2008
> >= < <=	Indicates a search on documents prior to or subsequent to a specific date.	<10-2-08 >=10-2-08
, (comma)	Indicates a search on documents between the two dates.	10-2-07, 10-2-08
- (minus)	Indicates a search on documents before or after a specific date expressed as number of days against the present date.	>-7 (all documents from 7 days ago) <-7 (all documents with the date before the date **of seven days ago)**

E.g.: You want to look for the next value: 328C/51242051-P-2-01

- When the value **328C/51242051P-2-01** is added in the search screen, you search for: 328C/51242051-P-2-01

- When the value **328C/51242051 – P – 2 - 01** is added in the search screen, you search for: (spaces are put before and after the hyphens)

  %328C/51242051% AND NOT %P% AND NOT %2% AND NOT %01%

- When the value **328C/51242051 - P*** is added in the search screen, you search for:

  %328C/51242051% AND NOT P%

- When the value **"328C/51242051P-2-01"** is added in the search screen, you search for:

  328C/51242051-P-2-01

5.3.5 Search from the tree structure

Though browsing is not really searching, we mention this possibility because browsing also allows you to find items you are looking for.

Click on a folder in the tree structure to see which items are located in it.
If you know the structure well enough, you can browse to a DocRoom item instead of searching it.

5.3.6 Saved queries

Saved queries offer you the possibility to save a query you want to re-use.
When a query is saved, it can be defined as:

- private (just for the user who saved it)
- public (all users can execute the saved query)
- secured (only the users you select can execute this query)

When a saved query is opened, the user will see the result of the query at once.

The list of saved queries is accessible via the menu view / saved queries.

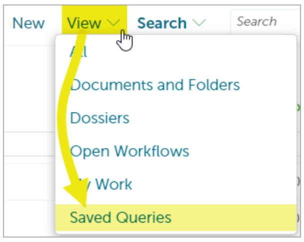
5.3.6.1 Create a saved query

- Open the search screen of your choice.
- Enter your search criteria in the search fields.
- Click on the ***Save*** button. A new window appears, containing the next configuration options:
    - **Scope**:
        - **Public**: Available for all users of the web interface. (Mind: don't do this too often, otherwise all users have a list of saved queries that is too long to be practical)
        - **Private**: Only available to the user who saved the query.
        - **Secured**: Only available to the users you select in the ACL list. The ACL settings will appear **after** saving the query.

          When you click on this option, the ACL window for saved queries will appear. In this window, you can define which users / groups / roles can:
            - **edit the query**: the user can edit the query by clicking on the icon in the list of saved queries
            - **run the query**: the user can execute the query by clicking on the name of it in the list of saved queries
            - **run a query subscription**: the user can subscribe to the saved query by clicking on the icon in the list of saved queries
    - **Folder:**
        - **Always on the root folder**: Saved query will always be executed on the root folder.

    - **On the folder where the query is executed**: Saved query will be executed on the folder where you are located when you execute the saved query.
    - **On this folder**: Saved query is executed on the folder where the creator was located when the query was saved.
  - **Name**: Name of the query - this name will appear as the list of saved queries.
  - **Save**: Click here to save your settings.
  - **Cancel**: Click here to cancel your settings.

5.3.6.2 Run a saved query



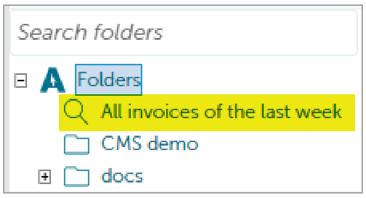
The list of saved queries can be opened:

- From the option **Saved queries** in the **View menu**

OR

- by clicking on the **Open** button in the **search screens**.

5.3.6.3 Saved query as a folder in the tree structure



A saved query can also be visualized as a folder in the tree structure.

When the user clicks on the folder, the query will be executed.

From version 6.9, it is possible to create a complete structure of query folders in the DocRoom tree structure: the user must simply drag a saved query from the saved query overview list to a saved query that is already present in the tree structure.

- A complete structure of Query Folders can be created in the Tree.
- Entire Query folder structures can be copied.
- Users can drag ’n drop query folders to new locations in the tree.
- A Query Folder can be found by using the Tree filter.
- In a Query Folder, users can create Property Expansions
- Under a Property Expansion, users CANNOT create Query Folders.
- Query folders can be added to (and removed from) My Favorites.

It is also possible to add new documents in a query folder. In that case:

- The document properties for that document will already be filled with the actual search values.
- This also works in combination with the Quick Upload Panel.

5.4 How to – folder actions

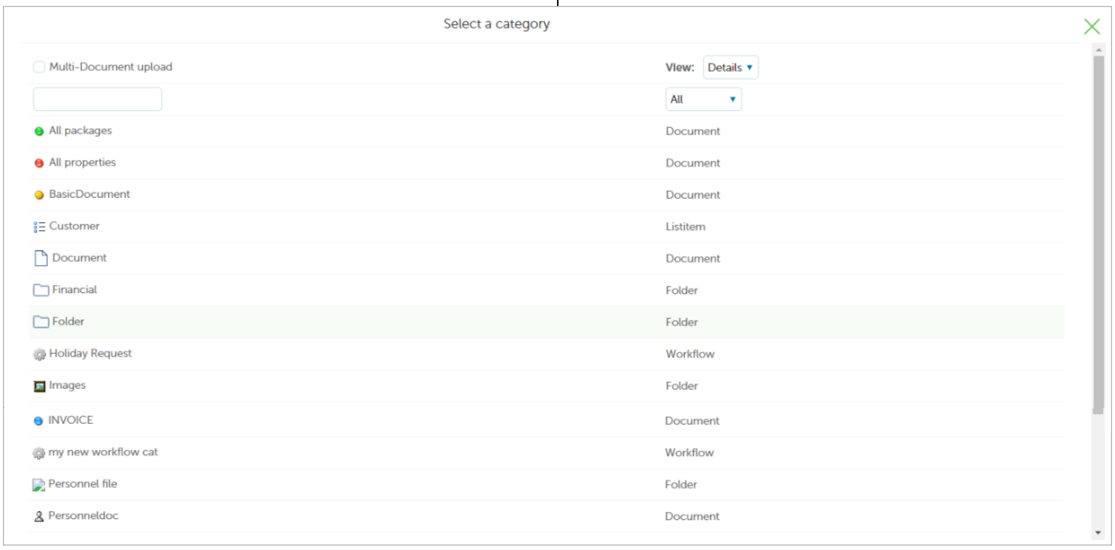
5.4.1 Add a document to a folder of the tree structure

Starting from the Tree Structure

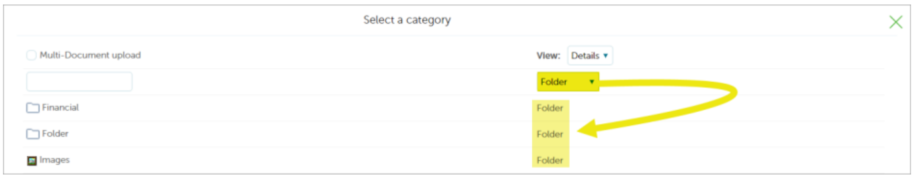
- Select the folder in the Tree Structure where the new document should be located.
- Click on the right mouse button to show the menu options.
- Click on the option ***New.***
- A new window "***Select a category***" appears.

Starting from the menu New.

- First select the folder where you want to add the document to in the tree structure.
- Click on ***New*** in the menu bar.
- A new window "***Select a category***" appears.



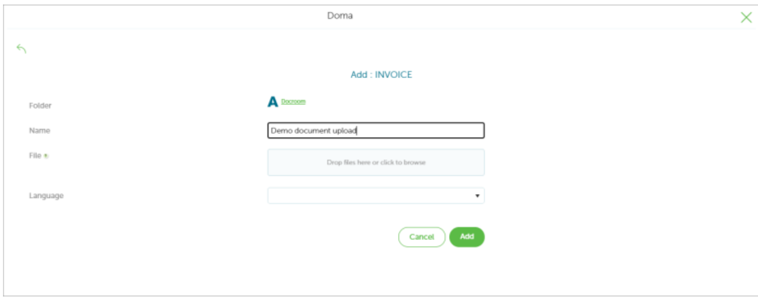
- If you want, you can limit the category list to documents only: select Document in the dropdown list above the list.



- Click on one of the categories (*) to create a new document of the selected document category.

**document categories are defined by the DocRoom administrator in the Doma Admin module.*

- The insert window appears:
  - Enter the name of the item in the field *name*. Select a file in the field File, using the select button next to the field (or drag a file to the field).
  - If you want to link another file to this document, click on the button Add File and select another file.
  - If you want to, you can define the language of the document.
  - Click on ***Add*** (right lower corner).



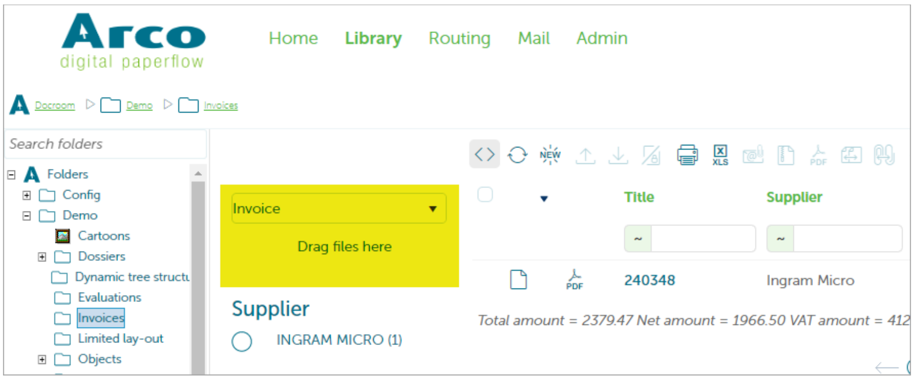
- The message “Saved successfully” appears in a pop-up screen.
- Depending upon configuration, a second indexation screen can appear. If so, complete the fields and save the document by clicking on the ***Save*** button in the toolbar (left upper corner).

5.4.2 Add a document to a folder of the tree structure using the QUP

From version 6.9, the Quick Upload Panel (in short: QUP) can be activated on the DocRoom folders.

When active, it will appear above the grouper(s) in the result screen.

On top of the QUP, you can select the document category for the document(s) that you want to upload.



To upload using the QUP:

- Select the folder where you want to add the document(s).
- Select the document category for the files you will upload in the QUP.
- Drag & drop the file(s) to the QUP. Per file, a new document is created.

Remarks

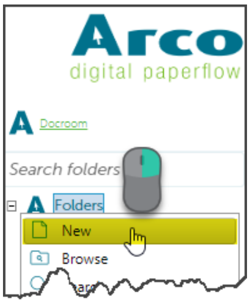
- When you index a document, it is important to save it by clicking on the *save* button before you close the window. If you forget this, the document will remain in the status *In Creation*. (You will be warned if you would leave the page without saving.)
- A document with the status *In Creation* can be recognized by the icon *In creation*.  You can change the status by opening (double-click), editing and saving the document. After this, the document will receive the status *In Production*. If you navigate away from the document without saving, a warning message will appear.

- In the part *My DocRoom* in the tree structure, you can find an item *In creation*. It contains all DocRoom items that are still in creation.
- If the insert action of the document is replaced by a workflow procedure, the first screen of the workflow procedure is shown to the user, instead of the detail screen of the chosen document category.
- When all steps of the procedure have been processed, the document status will be changed to *In production*. As long as the insert procedure is ongoing, the document remains in the *'In Progress'* status. The routing workflow can be visualised from DocRoom. When clicking on the document, users are redirected to the workflow screens. If the workflow is cancelled, the document is removed from DocRoom. If the workflow is ended successfully, the result of this workflow is the Document that resides in the *'Production'* status. The workflow is searchable.
- If the meta data entered on the screen is not valid (required field, field length and type, …), the document remains in the status 'OIP' (*Object In Progress*). If an object is in progress, only the person who is 'progressing' the document, sees this document in DocRoom. Once the document is saved, the document receives the *Production* status. At this point the document is visible for everybody.

5.4.3 Add a folder to the tree structure

Starting from the Tree Structure

- Select the folder in the Tree Structure where the new subfolder should be located.
- Click on the right mouse button to show the menu options.
- Click on the option ***New.***

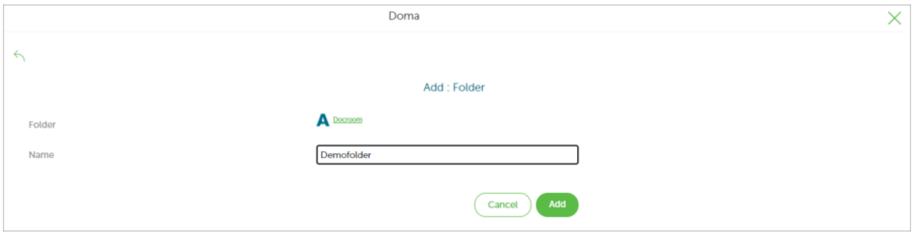


Starting from the menu New.

- First select the folder where you want to add the subfolder to in the tree structure.
- Click on ***New*** in the menu bar.

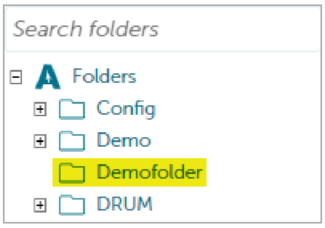
- A new window "***Select a category***" appears.
    - This window shows all categories that can be inserted by your user.
    - You can filter on these categories by using the fields in the toolbar above: from left to right you can filter on a (part of a) category name and/or on a category type.
- Select the **Folder** category type if you want to limit the list to folder categories only.

- Click on one of the categories (*), to create a new folder of the selected folder category.



(*) folder categories are defined by the DocRoom administrator in the Doma Admin module.

- Click on the button *Add* to save.
- Your new folder has now been created and appears in the DocRoom tree structure.



Remark

- (*) An application administrator can create a custom insert screen for a category. In that case, the administrator defines which properties appear when a folder is created.
- If the insert action of the folder is replaced by a workflow procedure, the first screen of the workflow procedure is shown to the user, instead of the detail screen of the chosen folder category. When all steps of the procedure have been processed, the folder will be created.

5.4.4 Add comments to a folder

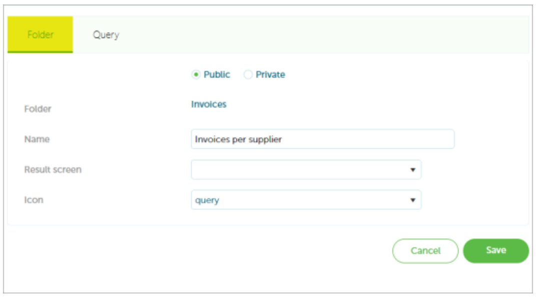
- Select the folder in the tree structure.
- Click on the right mouse button. A menu appears.
- Select the option *Open* or *Edit* in the menu.
- The folder details are shown.
- Click on the *Add comments* icon 

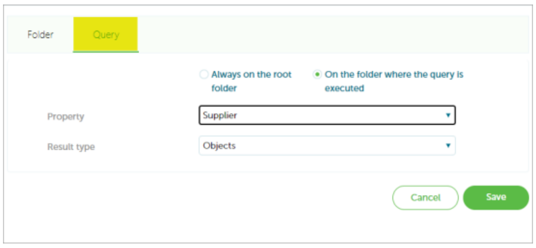
 in the toolbar at the right of the document.
- Enter your comment in the text field.
- Click on the ***Add*** button to add comment.
- Click on the button ***Add mail*** to send a comment by mail. This mail is not added to the comments list.

The comment will be added to the folder and appears in the list under the text field.
If comment is added, the comment icon in the result list will be  instead of .

5.4.5 Add a property expansion to the tree structure

- Select the folder where you want to create your property expansion in the tree structure.
- Select the option **Expand Property** in the menu that appears when you click on the right mouse button.
- A pop-up screen with the name **Expand property** appears. It contains 2 configuration tabs: ***Folder*** and ***Query***:





- Here you can define your property expansion. Enter the next criteria:

	Item	Description	
FOLDER	**Availability**	Private	The property expansion is only available for your user.
		Public	The property expansion is available for all user.
	Folder	Folder where you created the property expansion.	
	Name	Name of the property expansion.	
	Result screen	By default, the custom result screen is shown when a property expansion is opened. This field allows you to link another result screen to be shown when the property expansion is opened.	
	Icon	Icon that will be shown in the tree structure in front of the folders of the property expansion.	
QUERY	**Folder where the property expansion is executed**	Always on the root folder	The property expansion is calculated on the complete folder structure, i.e. all DocRoom items are rearranged in the property expansion.
		On the folder where the query is executed	The property expansion is calculated on the folder where the property expansion is located. Only DocRoom items of that folder and its subfolders are rearranged.
	Property	The property on which all items will be rearranged.	
	Result type	**Objects**	Shows objects in the result.
		My Work	Shows workflows from the My work list in the result.
		Open Workflows	Shows workflows from the Open workflows list in the result.
		My Workflows	Shows workflows from the My workflows list in the result.
		Archive	Shows workflows from the Archive in the result.

- Click on **Save** (right lower corner).

- A new (dynamic) subfolder structure appears under your folder. It shows a folder per value that has been found in the property selected in the field property.
- Click on a dynamic folder name to view its content.

5.4.6 Change folder name

- Browse to/search the folder of which you want to change the name.
- Right-click on the folder. A menu appears.
- Select the option ***Rename***. The screen ***Rename*** will pop-up.
- Fill in the new name and click on ***Save*** to save the new name. You can copy the original name by clicking on the copy icon next to it.
- The name of the folder will be changed.

5.4.7 Change folder security

By default, a folder inherits the security of the parent folder under which the folder is created. However, you can change the folder security via the item ACL management. This menu appears when you click on the right mouse button after you have selected the folder in the tree structure.

- Select the folder in the Tree Structure.
- Click on the right mouse button to show the menu options.
- Click on the option **ACL** to edit the folder security.

5.4.8 Copy a document from one folder to another

Starting from the result list

- Go to the folder where the document you want to copy is located (by using the Tree Structure or by doing a search).
- Select the document by checking the document selection checkbox.
- Go to the *Toolbar* and click on the icon ***Copy/Move/Shortcut to folder***.
- A new window pops-up:
  - Select the target folder in the tree in this window.
  - Select the option ***Copy*** in the toolbar.

The document is copied to the folder. A copied document is considered as a new independent document in DocRoom. When making changes on the original, the copy will not be changed and vice versa.

5.4.9 Create a new folder

See

Add a folder to the tree structure.

5.4.10 Create a subfolder

See

<u>Add a folder to the tree</u> structure.

5.4.11 Delete a folder

- Open the folder where the folder you want to delete is located.
- Select the folder you want to delete in the result list using the checkbox in front of it.
- Click on the delete icon in the toolbar.
- A confirmation window with the text *Are you sure you want to delete this folder?* appears.
- Confirm by clicking the ***OK*** button.

The folder, its content and subfolders will be deleted.
The deleted folder will appear in the ***Recycle bin*** of the *Personal folders* in the Tree Structure.
If you have sufficient user rights, you can remove items from the Recycle bin.
When you remove the folder from the Recycle bin it will be deleted permanently. It is also possible to restore the folder from the recycle bin. Right-click on the folder and choose the option ***Restore*** to move the folder to the Tree Structure.

5.4.12 Edit folder meta data

There are two ways to edit folder meta data. Which way the user must follow, is determined by the application administrator.

1. <u>Default way</u>

   First open the folder detail:

   - Select the folder in the Tree Structure or in the Result List.
   - Click on the right mouse button to show the menu options.
   - Click on the option ***Open*** to open the folder.

   You can edit the folder metadata:

   - Click the ***Edit*** button Edit in the toolbar.
   - A window pops up, containing all metadata fields in edit mode.
   - Make your changes.

- Click the ***Save*** button to save your changes.

2. Edit metadata by using a procedure

   - In this case, the procedure will guide you to edit the metadata. (A procedure can be used to ensure than changes are approved before they will be realized.)

Remark

If the *Edit* action of the folder is replaced with a workflow procedure, the first screen of the workflow procedure is shown to the user, instead of the detail screen of the chosen folder. When all steps of the procedure have been processed, the folder will be edited.

5.4.13 Link folders

- *If the documents and/or folders are located in different folders of the tree structure, first add all concerned items in the basket and link from there.*
- First select the items you want to link to a folder, by checking the selection boxes in the document/folder/workflow bar.
- Click on the icon ***Link the selected icons*** ( ) next to the folder name in the folder bar of the folder where you want to link them to.
- A pop-up window ***Link the selected items*** appears. In this window, the next information is mentioned:
  - Link [names of the selected folders/documents]
  - as [link descriptions] -> *click on one of these link descriptions to select the link relation between the linked items*
  - to [name of the selected folder]
- The message "*Your documents have been linked together*" appears in the window. Close the window.
- Once the links are created, the icon ***Linked documents*** ( ) will appear in the bar of all linked items.
- The linked items also appear in the tab ***Links*** of the document/folder/workflow.

5.4.14 Move a folder

- In the result list, check the selection box of the folder you want to move.
- Go to the ***toolbar*** and click on the icon ***Copy/Move/Shortcut to folder.***
- A new window pops-up:
  - Select the target folder in the tree in this window.
  - Select the option ***Move*** in the toolbar.

The folder will be moved to the target folder.

OR

- In the tree structure, put the cursor on the folder icon of the folder you want to move.

- Drag the folder to the target folder by holding the left mouse button.
- Release the mouse button.

The folder will be moved to the target folder.

The folder will inherit the security of the new parent. (If default security is active)

5.4.15 Open a folder in a new window as the root folder

Opening a folder as the root folder can be useful if you want to explore a folder without losing the overview.

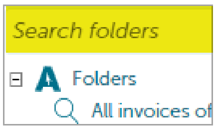
- Browse to the folder you want to open as the root folder in the tree structure or in the result list.
- Right-click on the folder. The folder options will appear.
- Choose the option ***Explore***. A new screen will appear.
- The selected folder will be shown as the root folder in a new screen.

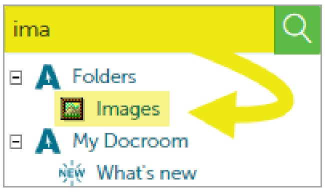
5.4.16 Search folder based on folder meta data

- Open the ***Search***-menu in the menu bar.
- Select the option ***Folders***. The Search screen for folders will appear.
- If you want to, you can limit your search to one folder category by selecting this category in the search field ***Category***.
- Fill in your search criteria in one or more fields.
- Click on ***Find*** to execute the search.

5.4.17 Search folder based on folder name

- Enter (a part of) the folder name in the *Search folders* search window, located above the tree structure.
- Press the [Enter] key OR click on the search icon.





Resulting actions:

- The tree will only show the folders that match the search criteria.
- Once the search is executed, the user can continue to work with the folders that were returned by the search.

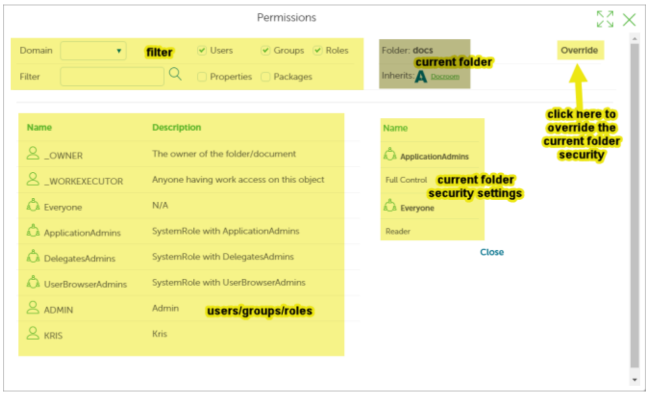
Empty the field to see all folders of the tree structure again.

5.4.18 Set security on folder

When creating a new folder, the folder will inherit the security settings of the parent folder.
All items that are added to this folder, will inherit the folder security settings.
These settings can be changed by changing the ACL (Access Control List) settings.

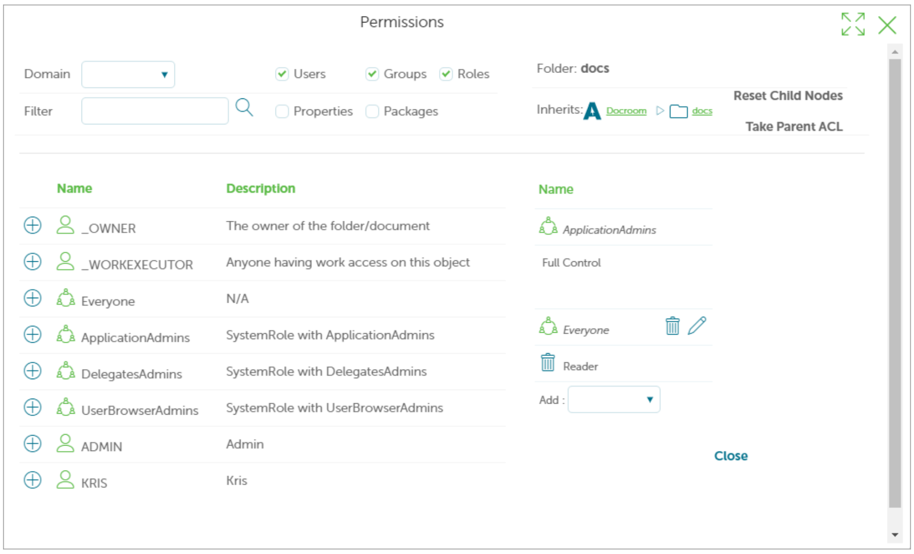
1. Select the folder where you want to change the security settings.
2. Click on the right mouse button.
3. A menu appears: select the option ***ACL management*** (Access Control List).

The ***Permissions*** window of the selected folder appears.



4. The security settings of the folder appear in the right column of the ACL window.
5. Click on the option ***Override*** in the right upper corner of the ACL window.

The ACL window now appears in *Edit mode.*



All security settings of the folder are in ***italic***: The inherited security of the folder is overridden. When items are added in the parent folder ACL list, they will not be added to ACL list of this folder.

When the inherited security of the folder is overridden, each item can now be overridden individually. As long as nothing has been changed to the initial settings, the inherited security settings will remain inherited: this means that, when changes are made to those items on parent folder level, these changes will also be applied to the items in this folder.

6. From this screen you can set the security.

- Click on ***Take parent ACL*** to inherit the security settings of the parent folder.
- You can also define a different security:
    - Select a user/group/role in the left column of the screen by clicking on the ***Add*** icon in front of the description. The user/group/role will appear on the right side of the screen.
    - Click on the ***Remove*** icon next to the user/group/role to remove it from the right column. In the right column, you can select an *Action Profile* for each user/group/role in the dropdown list. Click on the name of the action profile to view the settings of the ***Action Profile***.
    - Click on the ***Edit*** icon next to a user and its profile to change the profile.
    - You can also add an ***extra profile*** to a user by selecting it in the dropdown list. The user gets the sum of all actions mentioned in the profiles.
    - ***Lock a profile*** to prevent users of subfolders to change it by clicking on the ***Lock icon*** . It will turn into the status locked .
    - ***Copy a profile to the subfolders*** by clicking on the icon ***Copy to children*** .
- Copy the security settings of the folder by clicking the option ***Reset Child Nodes***.

6. Click the option ***Close*** in the right lower corner of the ACL window to close the window and save the settings.

Nice to know

- When no *Action Profile* is assigned to a certain user, this user will have *No access* to this folder.
- When more than one *Action Profile* is assigned to the same user, the user will gain all security rights mentioned in the different *Action Profiles*.

5.4.19 Show folder properties

- Select the folder in the Tree Structure or in the result list.
- Click on the right mouse button to show the menu options.
- Click on the option ***Open*** to show the folder options.

The metadata of the folder will be shown.

5.4.20 Show folder content

See *View folder*

5.4.21 Subscribe to a DocRoom folder

- Select the folder where you want to subscribe to in the tree structure or in the result list.
- Click on the right mouse button.
- A menu appears. Select the option ***Subscribe***.
- The message "*Your subscription has been created*" now appears.
- *Your new subscription will be visible in the Tree Structure under* ***My DocRoom*** *or in the* ***Home menu*** *under the name* ***My Subscriptions.***

Remark

- To get a subscription on all folders, subscribe to the DocRoom root folder.

5.4.22 View folder content

- Click on the folder in the Tree structure or in the result list.

OR

- Click on the right mouse button and select the option **Browse** to show the folder content.

Resulting actions:

- A list of all items that belong to the selected folder are shown in the result grid. Items belonging to subfolders of the current folder are not shown in the list.
  - Items available in the result list are:

    - Subfolders (depends on user settings) whether these items are visible.
    - Documents.
    - Mails.
    - Workflow dossiers.
    - Shortcuts to other items.

5.4.23 View folder meta data

- Select the folder in the Tree Structure or in the result list.
- Click on the right mouse button to show the menu options.
- Click on the option ***Open*** to show the folder options.

The metadata of the folder will be shown.

5.4.24 View linked items of a folder

From the result list:

- Click on the *Linked items icon* ( ) in the folder bar.

From the folder detail:

- Click on the folder bar with the left mouse button.

- The folder details appear.
- Click on the *Links* tab.

5.5 How to - document actions

5.5.1 Add a document

See chapter 5.4.1 Add a document to a folder of the tree structure.

5.5.2 Add a document using the same document category from the document detail window

It is possible to create a new document from the detail page of a document in the Web interface.

- Click on the new icon New in the toolbar of the document detail.
- A new document insert window appears.
- Enter the document name, link a file if wanted.
- Click on the ***Save*** option in the right lower corner.
- A second screen appears if the document has properties. Complete these fields.
- Save the document by clicking on the ***Save*** button in the toolbar (left upper corner).
- Your new document has now been created.

5.5.3 Add items using the Doma Explorer client module

Please see the user manual of Doma Explorer.

5.5.4 Cancel check-out of a document

- Go to your checked-out document:
  - Search it
  - Browse to it
  - Open the item My checked-out documents in the part My DocRoom of the tree structure.
- Click on the right mouse button on the document you want to check-in.
- Choose the option Cancel check out.
- The check-out is immediately cancelled.

- You can see that the document is available again by the icon in the document bar.

5.5.5 Check in document

- Open the item My Checked-out Documents in the My DocRoom part of the tree structure or browse to or search the checked-out document.
- Click on the right mouse button on the document you want to check-in.
- Choose the option *Check-in*. A screen will appear.
- You can choose between different options:
  - **Cancel check-out**: choose this option if you want to check-in the document without changing it.
  - **Save as new version**: the document will be saved as a new major version.
  - **Save as a new subversion**: the document will be checked-in as a new minor version.
  - **Overwrite current version**: this will overwrite the existing version. The old version will not be available.
- Click on **Save** to save your changes and check-in.
- Click on **Cancel** to cancel check-in and return to the previous screen without saving any changes.
- You can see that the document is checked-in by the icon in the document bar.

Remarks

- When you choose the option *Save as new version*, *Save as new subversion* or *Overwrite current version*, you will be able to keep the document checked-out (by using the checkbox Keep checked out).
- It is possible to add comments when checking in, by filling in your comment in the text field in the check-in screen.

5.5.6 Check out document

- Put the cursor on the document bar and click on the right mouse button.
- Click on the option ***Check out***.

OR

- Double click on the document title.
- The document detail pops up.
- Click on the check-out icon 

 in the toolbar to check-out the document.

<u>Resulting actions:</u>

- The document is now checked-out.

- The status of the document has changed form *In Production* to *Checked-out* (for other users) and *In Progress* (for the user who has checked-out the document).

5.5.7 Copy a document

Starting from the result list

- Go to the folder where the document you want to copy is located (by using the Tree Structure or by doing a search).
- Select the document by checking the document selection checkbox.
- Go to the *Toolbar* and click on the icon ***Copy/Move/Shortcut to folder***  .
- A new window pops-up:
    - Select the target folder in the tree in this window***.***
    - Select the option ***Copy*** in the toolbar.

The document is copied to the folder. A copied document is considered as a new independent document in DocRoom. When making changes on the original, the copy will not be changed and vice versa.

5.5.8 Create a shortcut to a document

Starting from the result list

- Go to the folder where the document where you want to create a shortcut to is located (by using the Tree Structure or by doing a search).
- Select the document by checking the document selection checkbox.
- Go to the *Toolbar* and click on the icon ***Copy/Move/Shortcut to folder***  .
- A new window pops-up:
    - Select the target folder in the tree in this window***.***
    - Select the option ***Shortcut*** in the toolbar.

The shortcut to the document is created in the target folder. Only users who have access on the original document can see and use the shortcut.

5.5.9 Delete document

Starting from the result list

- Go to the folder where the document where you want to create a shortcut to is located (by using the Tree Structure or by doing a search).
- Select the document by checking the document selection checkbox.
- Go to the *Toolbar* and click on the icon ***Delete***  .
- A new window with a confirmation message pops-up. Confirm to delete.
- The deleted document is moved to the recycle bin.

5.5.10 Edit the metadata of a document

- Right-click on the name of the document. A menu will appear.
- Choose the option ***Edit***.
- A new screen appears. Via this screen you can edit the document.
- You can move the document to another folder. Click on ***Select*** to select a folder from the index tree. This Tree Structure is similar to the Tree Structure of the Web Interface and makes it possible to choose the folder where you want to move the document to. It is also possible to do a search on the folders of the index tree.
- It is possible to change the category (= the document type or folder type) of the document. Depending on the category, other index fields will be shown. When you change the category of the document, all data of the indexes will be lost. When changing the category, a confirmation screen appears.
- Click ***OK*** to change the category, click ***Cancel*** to return without saving.
- In the field ***Name,*** you can change the name of the document.
- When a file is attached to the document, you will be able to edit this file.
- Click on the save button Save to keep your changes.
- When you edit a document and save it, you lose the previous version of the document. Only the version number of your document will indicate that the new version is an edited version.
- If you want to keep the previous version and/or change the version number on a higher level, you must check-out the document.

5.5.11 Open document

There are two ways to open a document:

Starting from the document bar.

- Browse to the document you want to open.
- Double-click on the document bar.
- The document will be opened in a new screen.

Starting from the document context menu.

- Browse to the document you want to open.
- Right-click on the document bar. The document context menu will appear.
- Click on ***Open***.
- The document will be opened in a new screen.

5.5.12 Open document detail

There are two ways to open the document details:

Starting from the document bar.

- Browse to the document of which you want to open the details.
- Click on the document bar.
- The preview pane will be opened at the right side of the screen.
- Choose the tab ***Details*** to see the document details.

Starting from the document context menu.

- Browse to the document of which you want to open the details.
- Right-click on the document bar. The document context menu will appear.
- Click on the document name (the first item in bold in the menu).
- The preview pane will be opened at the right side of the screen.
- Click on the tab ***Details*** to open the document details.

5.5.13 Search documents

See chapter
How to search in this manual.

5.5.14 Show document preview

- Browse to the document of which you want to see a document preview. (or search the document).
- Click on the document bar. A preview pane will be opened at the right side of the screen.
- Click on the ***Preview***-tab to view a preview of the main file of the document.

OR

- double-click on the document bar. The document's metadata and the preview will appear in a pop-up screen.

5.5.15 View a document

See chapter *Open document* in this manual.

5.6 Thematical summaries

5.6.1 Version management

5.6.1.1 Introduction

DocRoom allows users to create and save several versions of a document and/or of the files attached to a document.

Since documents can have more than one linked file, there is a distinction between document versions and file versions.

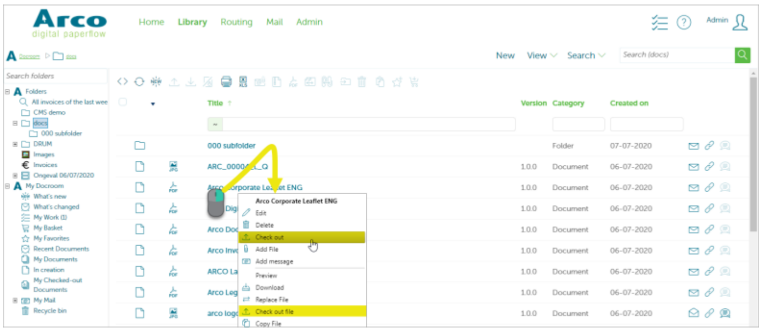
- When a document is checked-out, also the files linked to the document are checked-out.
- When a file is checked-out, other files of the document and the document itself are not checked-out.

5.6.1.2 Create a new document version

5.6.1.2.1 Check-out the document

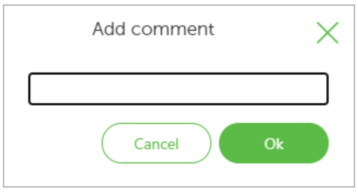
There are several ways to create a new document version. The creation of a new version can be started from:

- The menu that appears after you have double-clicked on the document bar in the result list.



- The pop-up edit screen of the document: click on the check-out button in the toolbar:

- When you start the document check-out, the next window will pop-up:



- Enter a comment and click on the **OK** button.

The document icon in the result list changes from the moment you have checked it out:

- The user who has checked-out the document will see the icon .
- Other users can see that the document has been checked out and see the icon .

When a user puts the cursor on the document icon, he/she can see who has checked-out the document:

5.6.1.2.2 Edit the document

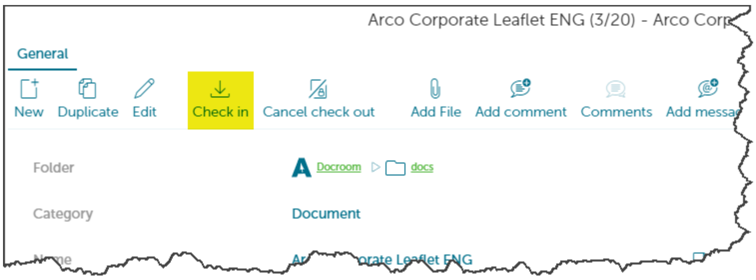
Select the option **Edit** in the right-click menu:

The document detail screen appears in edit mode, make your changes and save the document.

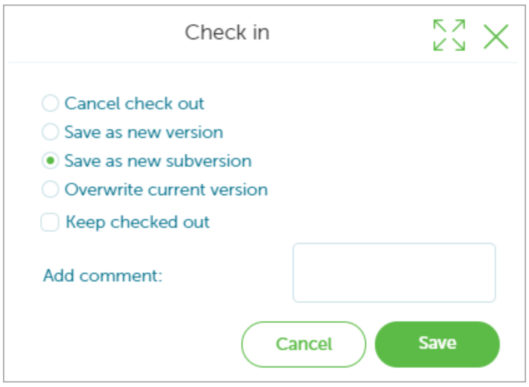
5.6.1.2.3 Check-in the document

A document can be checked-in in several ways:

When you have edited a document, you can click on the check-in button in the toolbar of the document detail screen:



The check-in window pops-up:



Item	Description
Cancel check out	Check-out is cancelled. No new version is created.
Save as new version	A new version of the document is created. The old version is kept and available in the list ***Version History***.
Save as new subversion	A new subversion of the document is created. The old version is kept and available in the list ***Version History***.
Overwrite current version	The current version is overwritten. The old version is not kept in the list ***Version History***.
Keep checked out	Saves the changes and keeps the document checked-out.
Add comment	Add a comment for check-in.

Select the option of your choice. After check-in or cancel of the check-in, the document regains its status in production . The new version is shown in the result list.
The previous versions of the document are shown in the list ***Version History***.

When you want to check-in a document from the result list, you can check it in with a right mouse click on the document bar. In the menu that appears, you can select the option **Check-in**:

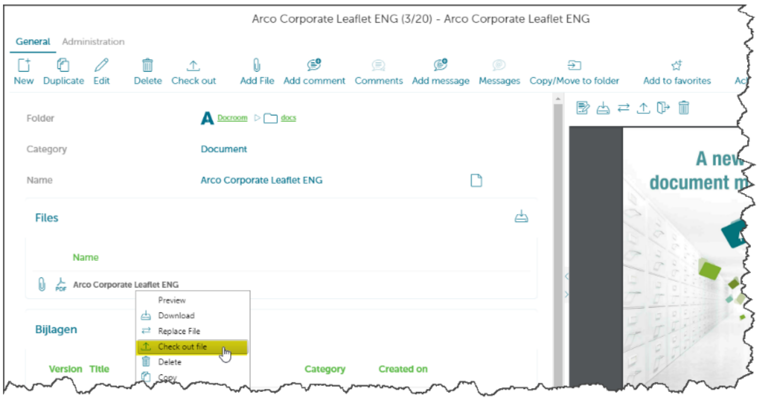
5.6.1.3 Create a new file version

5.6.1.3.1 Check-out the file

There are several ways to create a new file version. The creation of a new version can be started from:

- The menu that appears after you have double-clicked on the document bar in the result list. Select the option **Check out file**. (***Remark***: *When more than one file is linked to the document, you must click on the file icon itself.)*

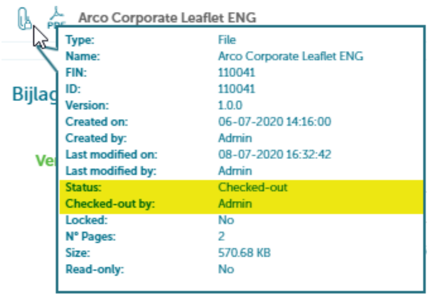
- The pop-up edit screen of the document: right-click on the file name. A menu appears. Click on the option **Check-out file**:



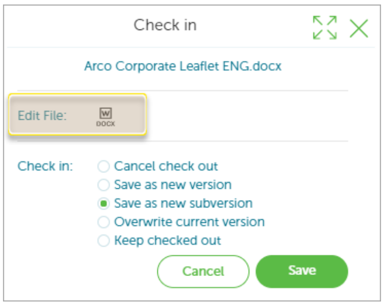
If more than one file is linked to the document, the file icon in the result list changes from the moment you have checked it out. Also in the document detail, you can see the same icon:

- The user who has checked-out the file will see that the file icon has changed from to .
- Other users can see that the file has been checked out and see the icon .

When another user puts the cursor on the file icon, he/she can see who has checked-out the file:



As a result of the file check-out, the next window appears:



Click on the file icon to open the file and edit. Save the file after changing it by clicking on the Save button in the Word application. The new version is automatically saved in DocRoom.

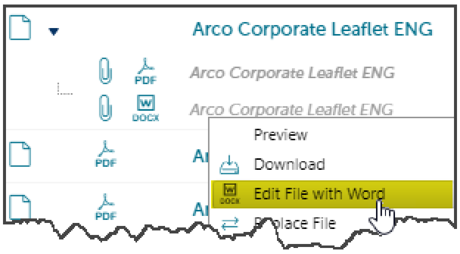
Close Word. You will see the above window, allowing you to save the edited file as a newer version in DocRoom.

5.6.1.3.2 Edit or replace the file

5.6.1.3.2.1 Edit the file

When the file is checked-out, you can edit it:

- Put the cursor on the file name (in the result list or in the document detail window) and click on it.
- A menu appears.
- Select the option **Edit file with Word** to edit the file in MS Word.



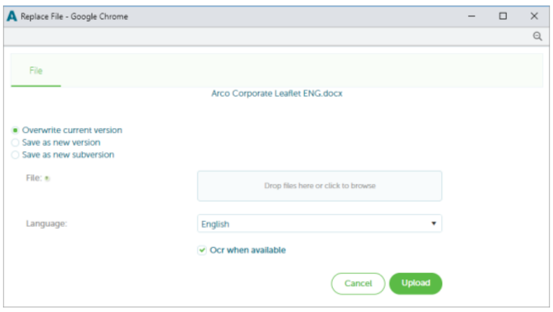
- The file will be opened in your local MS Word. Click on the Save button in the ribbon of Word to save the new version to DocRoom.

5.6.1.3.2.2 Replace the file

When the file is checked-out, you can replace it by another file:

- Put the cursor on the file name (in the result list or in the document detail window) and click on it.
- A menu appears.
- Select the option **Replace File**.

- The ReplaceFile window pops-up. Select the file that must replace the original one in the field **File**.
- Then click on the **Upload** button.

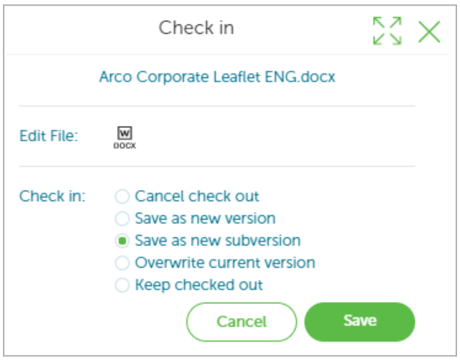


- The old file is now replaced by the new one.
- Then check-in the file.

5.6.1.3.3 Check-in the file

To check-in the new version of the file:

- Right-click on the file name in the result list or in the document detail window.
- A menu appears: select the option **Check in file**.
- The Check-in window pops up:



Item	Description
Cancel check out	Check-out is cancelled. No new version is created.
Save as new version	A new version of the file is created. The old version is kept and available in the list ***Version History***.
Save as new subversion	A new subversion of the file is created. The old version is kept and available in the list ***Version History***.
Overwrite current version	The current version is overwritten. The old version is not kept in the list ***Version History***.
Keep checked out	Saves the changes and keeps the file checked-out.

Select the option of your choice. After check-in or cancel of the check-in, the file regains its status in production. The new version is shown in the result list.
The previous versions of the file are shown in the list ***Version History***.

5.6.1.4 Version History list

Each document has a version history list.

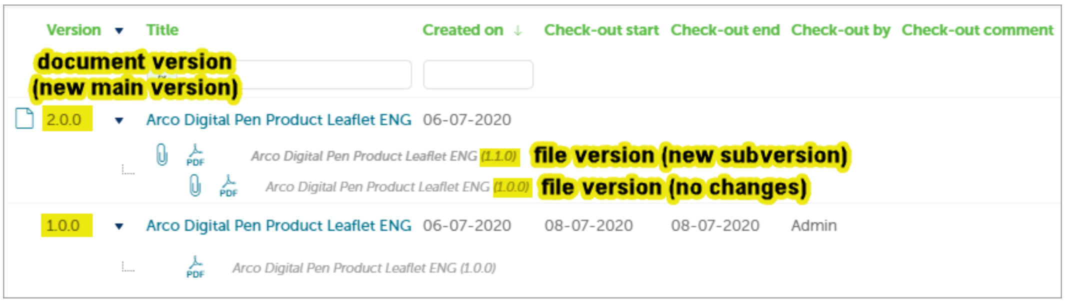
This list can be accessed

- from the document bar in the result list if the version history icon is shown:

- from the document detail window: click on the ***Version history icon*** in the toolbar or click on the tab ***Version History*** of the preview.

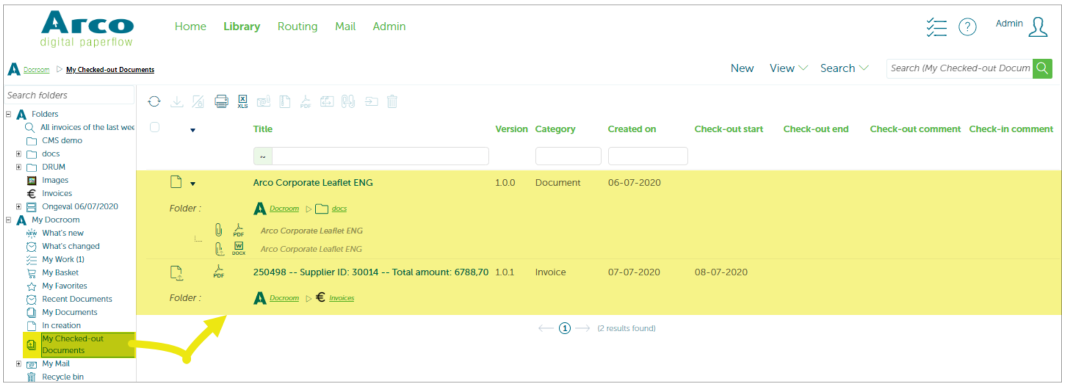
- from the document preview page: select the tab ***Version History.***

The list shows all versions of the document and the files linked to it:



5.6.1.5 My checked-out document

The list **My Checked-out Documents** of the part My DocRoom of the tree structure gives an overview of all documents that are currently checked-out by your user:

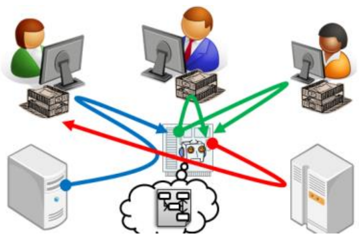


6 Routing

6.1 Introduction

Routing is a workflow management system: it is a computer system used to create, execute and follow-up workflow procedures. It is a part of the Doma solution.

What is workflow?



Workflow is the automation of a business process, in whole or part, during which documents, information or tasks are passed from one participant to another for action, according to a set of procedural rules.

Workflows are created in a workflow management system, i.e. a system that defines, creates and manages the execution of workflows through the use of software, running on one or more workflow engines, which is able to interpret the process definition, interact with workflow participants and, where required, invoke the use of IT tools and applications.

In a workflow, an object must follow a predefined route (flow). A predefined route is called a ***Procedure.*** A procedure is built out of several **steps**. Each step represents a certain moment in the procedure.

- *A **procedure** is not a DocRoom object, which means that a procedure case will not automatically be stored in DocRoom when it's not active anymore.*

- A *Procedure* has its own
  - ***Properties*** (fields)
  - ***Packages*** *(document or workflow placeholder)*

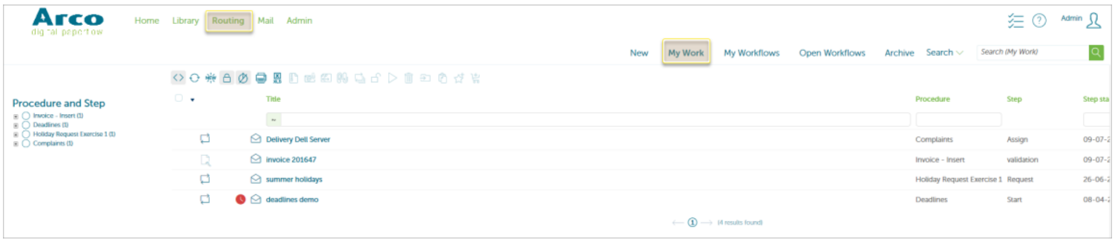
Routing can be used for

- **Document oriented workflow**
  - Create/update/delete a document by using a workflow
  - Document retrievable in DocRoom from procedure start
  - Document runs through a procedure before being published as a document

- **Process oriented workflow -** *Define your business process in Routing*
  - Automation of certain steps
  - Easy follow-up using workflow search screens
  - Reporting using external reporting tools

6.2 Short description of how Routing works for you as a user

When you start the Doma Web interface, you will see a button ***Routing*** in the navigation bar on top of the screen.
When you click on this button, you will see the Routing workflow interface.



By default, your personal work list (My Work) is shown. This list contains all work you must do. This list can contain different jobs from different procedures that are located in different steps of the procedure.

Example of a work list of a user:

Procedure	Step	Assigned to	Remark
Holiday request	Request	Only you	You must complete your holiday request for next summer
Invoice - insert	Validation	Only you	You must validate an invoice for a purchase made by your department
Complaints	Assign	You and the colleague that is your back-up	You must read the complaint and assign it to a member of your department who will treat the complaint

When you double click on an item in the list, it opens in a pop-up screen. In this screen, you will treat the work for this workflow:

- Read the information that is shown to you
- Add new data – complete fields in the screen.

Click on the button **Next Step** when you have done all that you must do. The pop-up window will close and the work will disappear from your work list. It is sent to the person(s) who has (have) to treat the next step.

- The work in your work list can be assigned to:
  - You personally.
  - A group of users of which you are one person.
  - Someone else who has delegated his/her work to you.

- The work that is assigned to more than one user
  - Is visible in the work list of each user to whom it has been assigned.
  - From the moment one user opens it to treat it, the work is locked by this user. The other users to whom the work is assigned can then only read the item, but they cannot make changes in it. This is done to avoid that an item is changed by more than one person at the same time. Once the user has done the work and clicked the button Next Step, it will disappear from the work list of all the users who had the same work in their list.

- **Click** on a Routing workflow bar to view its details in read-only.
- **Double-click** on a Routing workflow bar to view its details and treat the step.
- **Right-click on a Routing workflow opens a menu with possible actions on the workflow.**

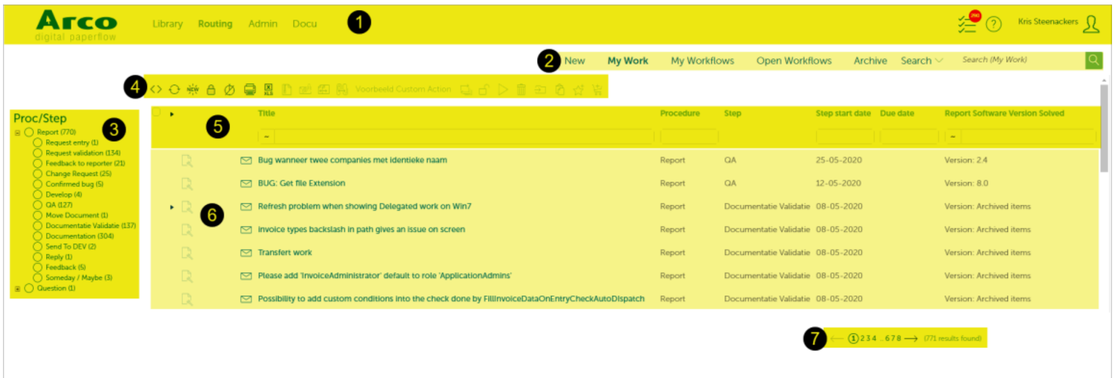
6.3 Routing Workflow start page

When the user selects the option *Routing* in the navigation bar, the Routing Workflow page is shown.

By default, the list *My Work* of the Routing Workflow will be opened. This list shows your Personal work list, the names of the users who have delegated work to you and all subjects distributed to you.

Also, other Routing lists can be selected as a Routing Workflow start page.

- **Click** on a Routing workflow bar to view its details in read-only.
- **Double-click** on a Routing workflow bar to view its details and treat the step.
- **Right-click** on a Routing workflow opens a menu with possible actions on the workflow.



The My work result list can consist out of the next parts:

(1) Application toolbar - Allows you to browse to the main parts of the Doma application.

(2) Routing Workflow menu bar - Allows you to start a new workflow or to view one of the pre-defined Routing Workflow result lists.

(3) Side panel - Procedure and step filter - click on a procedure and one of its steps to filter the selected items in the list at the right.

(4) Toolbar - here you can select an action that will be executed on the selected items in the result list.

(5) List header - the list header shows the column names and columns filters. Re-order your result list with a left mouse click on a column name. Change filter, groupers view or columns view with a right click on the list header.

(6) Routing workflow bar - shows information about the Routing dossier and icons to do pre-defined actions on the Routing dossier. ***Click on the Routing workflow bar to see its details in read-only.***

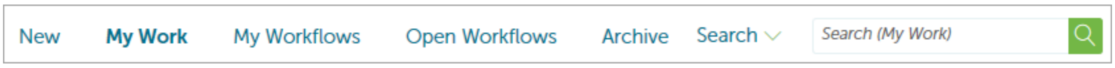
(7) List navigation and number of results - Shows how many items are in this result list and navigation buttons to go to previous/next pages of the list.

6.3.1 Navigation bar

See *introduction*.

6.3.2 Routing workflow menu bar

The menu bar is a list of actions that can be executed within the context of the current folder (which is indicated in the breadcrumbs).
It appears on the same level as the breadcrumbs.



Each item of the *Menu Bar* opens a Routing Workflow list.
It also contains a global search field.
From this menu bar, the next menus can be opened:

6.3.2.1 New

When you select the ***New*** option, a pop-up window appears.

It shows a list that contains all procedures and workflow categories that can be started by your user.

By clicking on the name of the procedure or workflow category, a new workflow is started.

6.3.2.2 My Work

The list ***My Work*** shows your Personal work list and all work delegated to you.
Items that appear in this list can be assigned to your user only or to several persons.
In case it is assigned to several persons, only one person must treat the work by default.

6.3.2.3 My workflows

Click here to view the list ***My Workflows***. This list shows all active workflows that were started by your user.

6.3.2.4 Open workflows

Click here to view the list of open workflows. It shows all workflows that are not finished yet and that you are allowed to see.

6.3.2.5 Archive

Click here to view the archived workflow list. It shows all workflows that were ended and added to the archive.

6.3.2.6 Search

Click here to open the Routing workflow advanced search window. It allows you to search for details of workflows.

Select a procedure or workflow category in the dropdown field procedure to limit the search to that Procedure or workflow category. As a result, only the search fields for the selected procedure or workflow Category will appear.

6.3.2.7 Global search field

The global search field allows you to search on all available information (all metadata: i.e. title, author, ... + full text) of an item.

The search will be executed in the selected list. (My Work in this example)

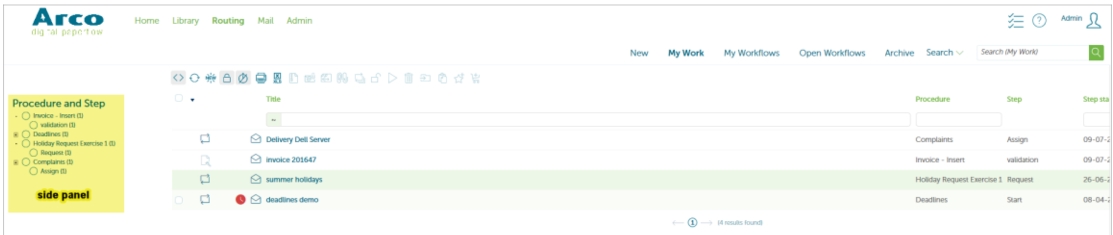
How to search

- Enter your search criterion in the field. If more than one word is searched, you can use Search Operators.
- Click on the magnifying glass icon at the right of the field to start the search or press the [Enter] button.

Remark: *It's not possible to enter a date or number in the Global Search field. If you want to search for certain dates, you can search via the Search menu. There you can enter the searched date in the Date field.*

6.3.3 Side panel - Procedure and step filter

The side panel shows a procedure and step filter for the selected result list.



- Click on a procedure name to show only items of the selected procedure in the list.
- Click on the expand button ⊞ in front of a procedure to show the steps.
- Click on a step name to show only items of the selected procedure that are located in the selected in the list.

6.3.4 Result list Toolbar

The result list toolbar allows users to do actions on items selected in the list.

Overview of the result list toolbar icons

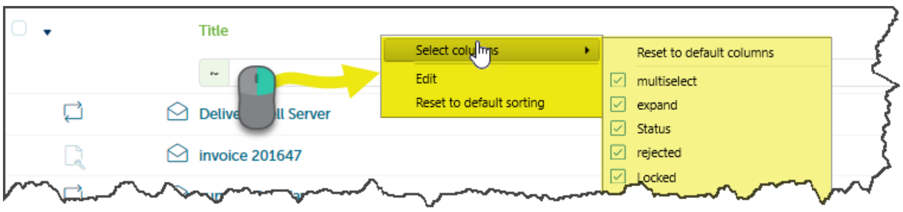
Icon	Name	Description
	Show/hide side panel	Click here to show/hide the side panel.
	Refresh	Click here to refresh the result list.

	What's new	Click here to show the list what's new for the active result list. A calendar will appear and allows you to filter on a day or a period.
	Show locked **Hide locked**	Click here to show/hide the workflows assigned to you but locked by other users.
	Show suspended **Hide suspended**	Click here to show/hide your suspended workflows. *When shown, suspended workflows appear in italic.*
	Print	*Only available for DocRoom items.* Will open the print options screen. The user can print a selection, the current page or all pages to an html page.
	Export to Excel	*Only available for DocRoom items.* Will export the selection to an .xls file.
	Download to ZIP	*Only available for DocRoom items.* Will export the selection to an .zip file.
	Send by mail	*Only available for DocRoom items.* Will send the selected DocRoom object by mail.
	Compare documents	*Only available for DocRoom items.* Will compare the properties of the selected documents.
	Compare files	*Only available for DocRoom items.* Will compare the selected files.
	Open workflows	Will open the selected workflows in a pop-up window. When opening, the workflows are also locked by your user, so no other user can treat these items.
	Unlock workflows	Will unlock the selected workflows, thus allowing other users to open them.
	Release workflows	Will release the selected workflows (send them to the next step).
	Recalculate work	Will recalculate the work of the selected workflows. This means the workflows are unlocked and re-assigned to the users to whom the current step is assigned.
	Finish workflows	Will end the workflows and move them to the archive.
	Delete workflows	Will delete the workflows: the workflows are ended and are not archived.
	Copy/Move/Shortcut to folder	Will cut, copy or move DocRoom items selected in the list to the selected folder.
	Add to clipboard	Will add the selected items to the Doma clipboard.
	Add to favourites	Will add the selected items to your favourites list.
	Add to basket	Will add the selected items to your basket.

6.3.5 List header

A header is shown on top of each result list.

- For some columns, a column name is shown in the header.
- Also filters are shown in this header (if they are activated).
- Put the cursor on the header and click on the right mouse button to show/hide certain columns.

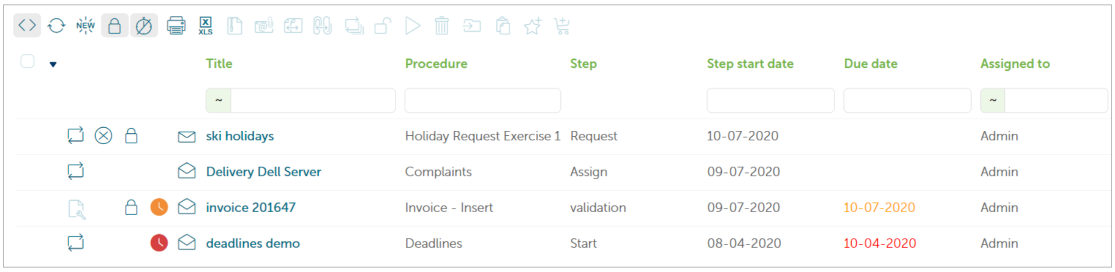


The next columns are available in the default My work result list:

Column	Description
Multiselect	Shows a select box.
Expand	Show all items linked to the workflow in the list.
Status	Shows a status icon. Put the cursor on the icon to see more information about the workflow.
Rejected	Shows an icon when the workflow is rejected in the next step. When a rejected workflow appears in the list, the reject icon ⊗ is shown.
Locked	Will show an icon when the workflow is locked.
Duedate icon	Will show a deadline icon when a deadline is defined for the workflow. Deadline is set in the future. Deadline is due within 24 hours. (Default settings) Deadline is overdue.
Read	Will show an envelope icon to indicate whether the item has already been opened.
Priority	Will indicate the priority of the workflow.
Title	Title of the workflow.
Procedure	Procedure that is followed by the workflow.
Step	Current step of the procedure.
Step start date	Start date of the current step.
Due date	Due date. Different colours are used to indicate the status of the due date: Green: on track Orange: almost overdue Red: overdue
Worklist	List of names of the users, roles and/or groups where the workflow is assigned to.
Created by	User who started the workflow.
Created on	Date and time when the workflow was started.
Workflow due date	Due date of the workflow.
Step due date	Due date of the step.
Link tome	Icon to link items in the list.

6.3.6 Routing workflow bar

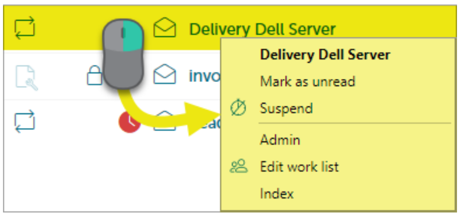
Each workflow item is represented in a bar in the result list.
Each workflow bar contains information about the workflow, which is represented in different columns. The example below shows 4 workflow bars:



- **Click** on a Routing workflow bar to view its details in read-only.
- **Double-click** on a Routing workflow bar to view its details and treat the step.
- **Right-click** on a Routing workflow opens a menu with possible actions on the workflow.

6.3.7 Right click menu for workflow bar

When you put the cursor on the workflow bar and then click on the right mouse button, a menu appears. The menu that appears can be different from the example.



Overview of the menu items:

Item	Description
Title in bold	Title of the workflow
Unlock	Appears only when the workflow is locked. Click here to unlock the workflow. *Not shown in example. Only available for administrators.*
Mark as unread	Option to mark the work item as *unread*. *(icon = closed envelope)*
Suspend	Click here to suspend the workflow.
Admin	Click here to open the admin screen for this workflow. *Only available for administrators.*
Edit work list	Click here to edit the work list of this workflow. *Only available for administrators.*
Index	Shows the index of the object.

6.3.8 List navigation and number of results

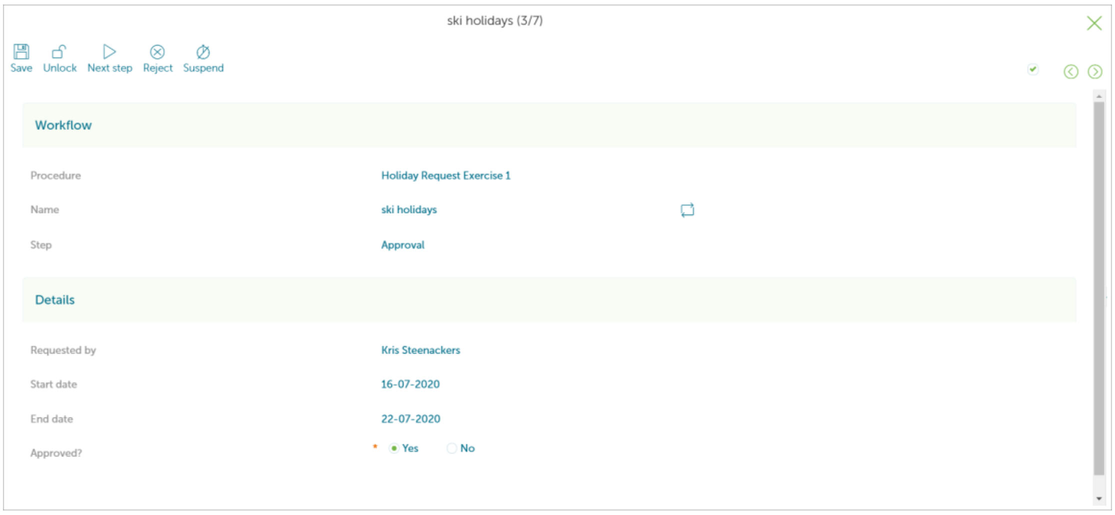
At the bottom of the list, you can see the list navigation and the number of results:

By default, 20 items are shown per page. From the moment you have more items in your list, you will have to navigate between the different pages of the list by using the list navigation buttons.

You can define the number of items per page for your own result lists in your personal settings screen. Click on your username in the navigation bar to open this screen.

6.4 The workflow detail screen

When you double-click on an item in your work list, you will open the step detail screen.



This step detail contains a toolbar and a number of properties.
A step can also contain a number of packages, i.e. placeholders for documents, workflows or dossiers.

6.4.1 Toolbar

The toolbar contains a number of action buttons. The buttons mentioned in this description are the buttons shown by default. This can be different from the toolbar in your workflow detail.

Overview of the default step detail toolbar buttons:

Button	Description
Save	Click here to save your work: all your changes will be saved; the workflow remains locked by your user and remains in your worklist.
Unlock	Click here to unlock the workflow: the workflow will be available for other users to whom the current step is assigned.
Next step	Click here to continue the workflow: you have completed your step and want the workflow to continue to the next step.
Reject	Returns the work to the previous step. Before this is done, a rejection comment must be entered.
Suspend	Click here to suspend your workflow. Suspended work disappears from your work list. • When suspending, you must enter a date. When this date has been reached, the suspending is automatically ended and the workflow reappears in your work list. • The *My work* list toolbar contains a button ⌀ to show/hide suspended workflows. Suspended workflows are shown in italic. • When you open the step detail a suspended workflow, it will be no longer suspended.

6.4.2 Properties

Properties can appear in three modes:

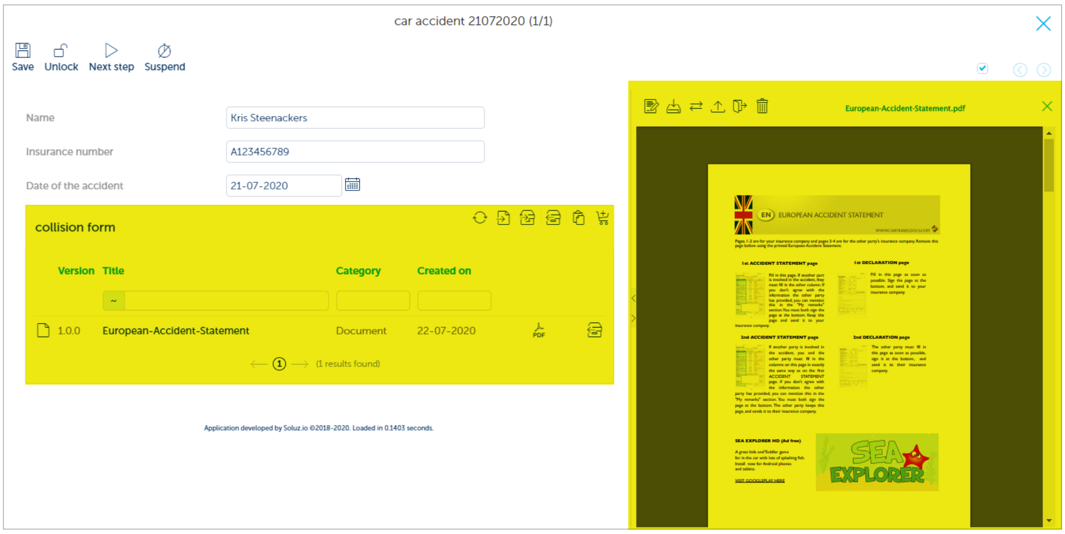
1. **read-only**: the user can only read the information of this property.
2. **editable**: the user can input values, but is not obliged to do so.

3. **mandatory**: the user must enter values before he/she can release the workflow to the next step. Mandatory fields always have an asterisk (*) in front of them.

6.4.3 Packages

6.4.3.1 DocRoom package

DocRoom package, containing a pdf file

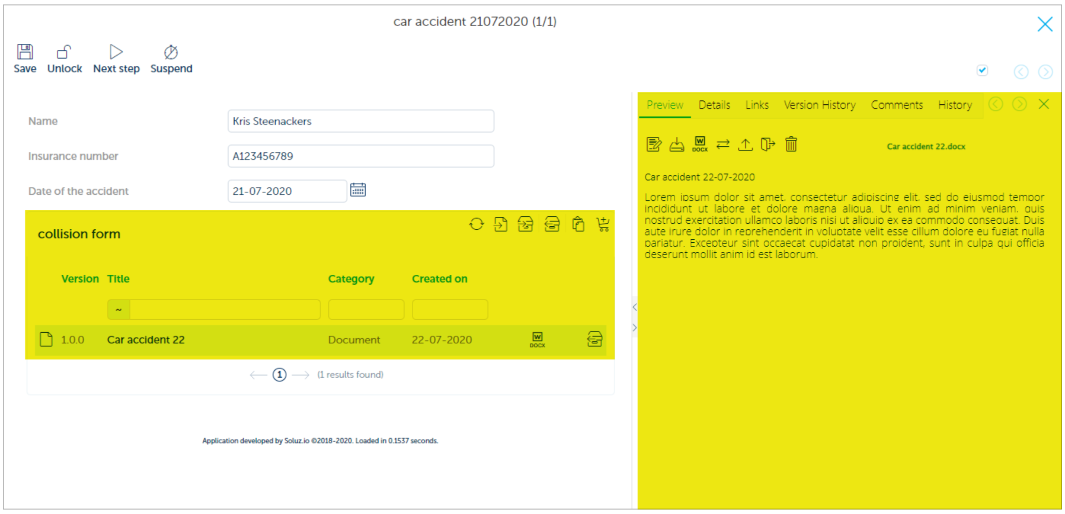


At the left of the screen, the package mentions the file name.
Other files can be added to the package by clicking on the paperclip at the right of the package. When you click on the paperclip icon, an insert window will appear.

A preview of the first file of the package is shown in the right pane.
When more than one files are linked to the package, you can switch between previews by clicking in the package on the file icon of the file you want to preview.
To show the pdf preview, the pdf viewer that is installed on your local pc is used.

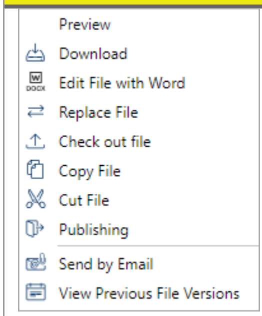
6.4.3.1.1 DocRoom package in read only mode with a Word file attached – the Word file can be edited.

When a DocRoom package is shown in read-only mode, no paperclip is available at the right side of the package.

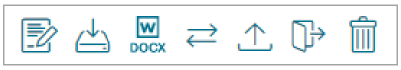


This package contains a Word file. Several actions are possible on the file. These actions can be shown by putting the cursor on the file icon in the package - then click on the right mouse button to show a menu. The file preview also contains a number of buttons in the file toolbar in the upper left corner of the preview.

6.4.3.1.1.1 Right click menu on file icon in package:

	Item	Description
	**Preview**	Show a preview of the file in the right pane.
	Download	Download the file to your pc. When selected, a screen will pop-up, allowing you to configure the download.
	Edit file with Word	Will open the file in your local Word application. Simply click in the Save button in Word to save your changes. The changes will be saved in the system.
	Replace file	Click here to replace the file with a file from your computer. A selection window will appear when you choose this option.
	Check out file	Will check the file out, so version management can be done. *Please refer to the DocRoom User manual to know more about document versions.*
	Copy File	Will copy the file. *Only available if you have sufficient rights.*
	Cut File	Will cut the file. *Only available if you have sufficient rights.*
	Delete File	Will delete the file. *Only available if you have sufficient rights.*
	Publishing	Allows you to share a file link to external users.
	Send by Email	Allows you to send the file as an email attachment.
	View previous file versions	Shows the list of all previous file versions.

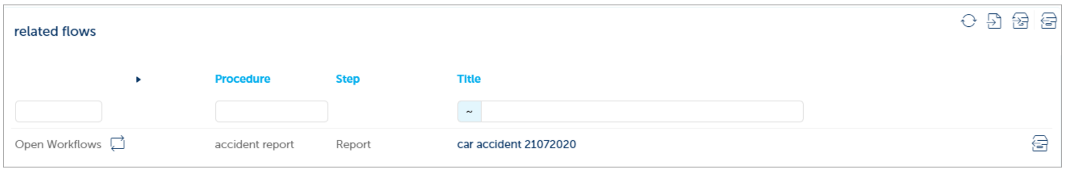
6.4.3.1.1.2 File menu in preview

Icon	Icon name	Description
	**Rename**	Will rename the file. *Only available if you have sufficient rights.*
	**Download**	Download the file to your pc. When selected, a screen will pop-up, allowing you to configure the download.
	**Edit file with Word**	Will open the file in your local Word application. Simply click in the Save button in Word to save your changes. The changes will be saved in the system.
	**Replace file**	Click here to replace the file with a file from your computer. A selection window will appear when you choose this option.
	**Check out**	Will check the file out, so version management can be done. *Please refer to the DocRoom User manual to know more about document versions.*
	**Delete**	Deletes the file.

6.4.3.2 Workflow package

Also workflows can be linked in packages:



When the user clicks on the workflow in the package, it is opened in the preview pane.

When users are allowed to add items to the package, a number of buttons are available at the right side of the package. When the user doesn't have edit rights, these buttons will not be shown to the user.

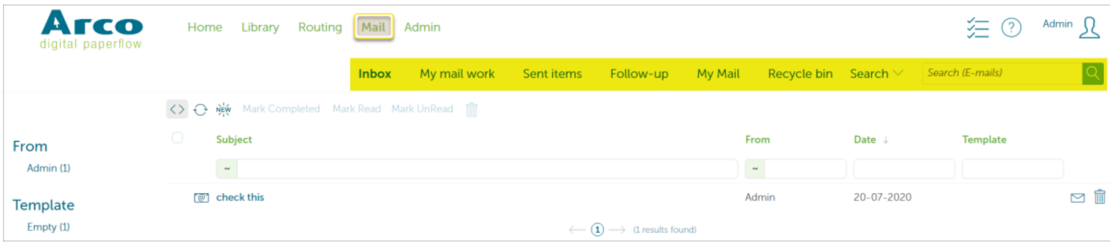
Overview of the buttons:

Button	Name	Description
	Refresh	Will refresh the package list.
	New	Will create a new Doma item.
	Add	**Click on this button to add a workflow to the package.**
	Clear	Click on this button to remove all items in the package.
	Add Clipboard	Click here to add items from the clipboard to the package.
	Add Basket	Click here to add items from the basket to your package.

7 Mail

7.1 Introduction

The Doma Web interface offers an item ***Mail*** in the navigation bar:



This part of the manual describes the Mail part of the Doma web interface.

<u>Remark</u>*: it is possible that this item is not shown in the Doma of your organization/company.*

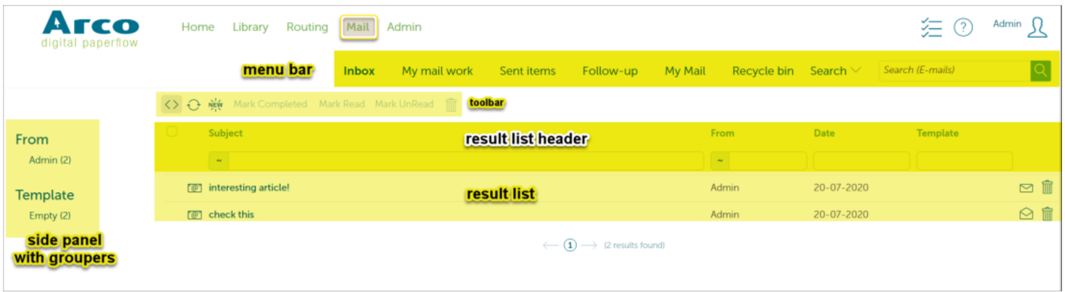
7.2 Description

Though mail is often considered as e-mail, the mail mentioned in the Doma web interface is a combination of sent e-mail and an internal messaging system.

When selecting the Mail item in the navigation bar of the Doma web interface, a menu shows the next items: ***Inbox***, ***My mail work***, ***Sent items***, ***Follow-up***, ***My Mail***, ***Recycle bin*** and ***Search***.
By default, the inbox is opened.

7.2.1 Inbox

The inbox contains all Doma mail messaging that is addressed to your user. It is not to be confounded with your Outlook e-mailbox. E-mails that are sent to your regular e-mail address are not listed here. Only mails and messages sent from Doma will appear in this list.



7.2.1.1 Result list

When you open the inbox, you will see a result list, containing all mail messages sent to you. Each mail message is represented by a bar that contains information in columns.

The behaviour of the message bar is standard Doma behaviour:

- **Left mouse click**: opens a preview window in the right pane of the window.
- **Double mouse click**: opens a pop-up screen that shows all the details of the mail. On top, a toolbar allows to send a reply message, forward the message and/or delete the message.
- **Right mouse click**: shows a context menu with several options.

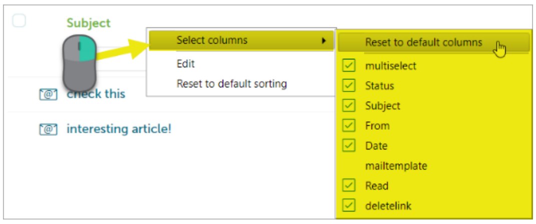
7.2.1.1.1 Result list header

7.2.1.1.1.1 Filters

The result list contains a number of filters in which you can enter a value. Only items containing the value of the filter will be shown in the result list.

7.2.1.1.1.2 Columns

Which columns are shown and where they are put, is pre-defined.
However, it is possible to show/hide columns of the result list: put the cursor on the result list header and click on the right mouse button. Click on a column name to show/hide the column.



☑ = column is shown
No icon = column is hidden

7.2.1.1.2 Toolbar

Above the result list header, you see the toolbar. It contains a number of buttons can be used to do an action on the mail messages that were selected in the result list.

The next actions buttons are available by default in this toolbar:

Icon	Name	Description
< >	**Show side panel**	Shows/hides the side panel that contains a pre-defined filter (grouper).
	Refresh	Refreshes the result list.
NEW	**What's new**	Shows all mail items that were added today.
Mark Completed	**Mark Completed**	Mark the selected items as *Completed*.
Mark Read	**Mark Read**	Mark the selected items as *Read*.
Mark UnRead	**Mark Unread**	Mark the selected items as *Unread*.
	Delete	Delete the selected items. They will be moved to the recycle bin.

7.2.1.1.3 Result lists

7.2.1.1.3.1 My mail work

Shows your inbox with all mails on which the follow-up is activated.

7.2.1.1.3.2 Sent items

The part ***Sent items*** contains all mail messages that were sent by your user. (Also those sent to external e-mail addresses).

7.2.1.1.3.3 Follow-up

The part ***Follow-up*** contains all your replies.

7.2.1.1.3.4 My Mail

The part ***My Mail*** contains all your mail items. In a column is shown in what list they are located.

7.2.1.1.3.5 Recycle bin

The ***Recycle bin*** of the mail section contains all your deleted mail messages. From here you can restore them or remove them completely.

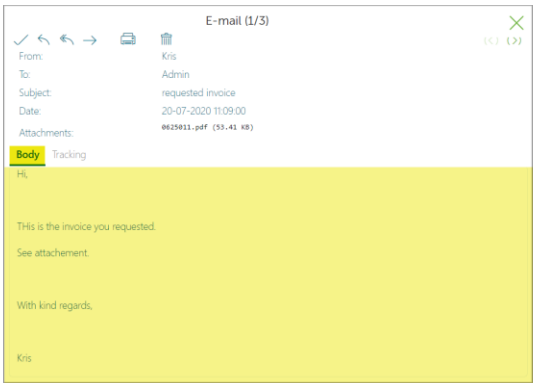
7.2.1.1.3.6 Search

Overview of all search screens for mail messages. The name of the search screen indicates in which list you are searching. All search screens allow you to search on all metadata and full text by using the search field ***All***.

Item	Description
Current	Search in the list that is currently selected.
My mail	Search in the My Mail list.
Inbox	Search on the Inbox.
Sent items	Search on the Sent items.
My mail work	Search in the My Mail Work list.
Recycle bin	Search in the mail recycle bin.

7.2.1.2 Mail message detail

The mail message detail screen is a straight- forward screen that contains mail metadata (Sender, receiver, subject, date), attachments, the mail body (containing the message) and tracking info.



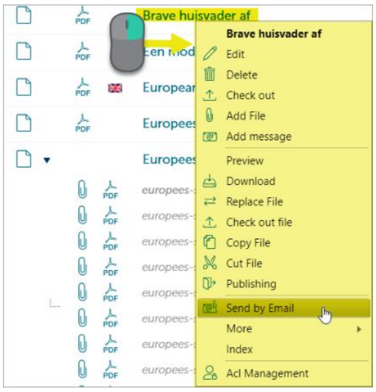
It also contains a toolbar that allows the following actions:

Icon	Label	Description
	Mark completed	Mark message is completed.
	Reply	Opens a window to reply to the sender of the mail message.
	Reply to all	Opens a window to reply to all concerned users of the mail message.
	Forward	Opens a window to forward the mail message.
	Print	Will print the mail message.
	Delete	Will move the mail message to the mail Recycle bin.

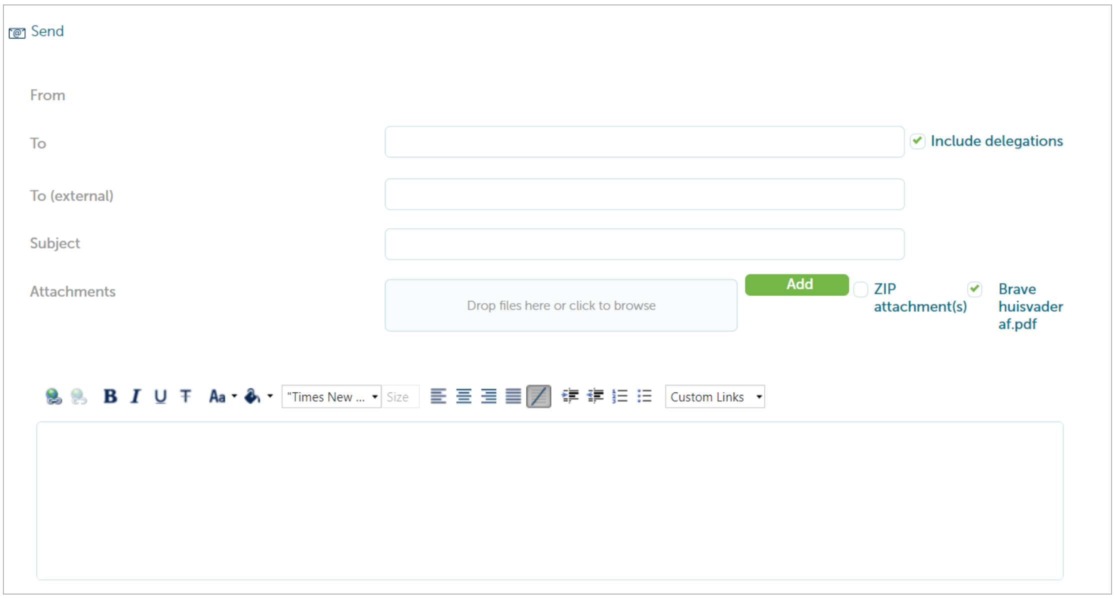
7.3 Send mail and e-mails from Doma

7.3.1 *Send by Email* option in context menu of Doma object in the result list:

- Put the cursor on the document bar and click on the right mouse button to show the context menu. Select the option ***Send by Email***.



The mail window pops up:

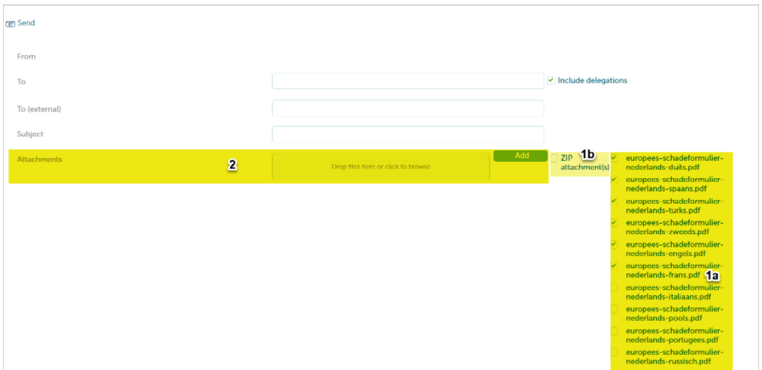


7.3.1.1 Send a mail with the files as attachment

When you want to send an email with the files of the documents attached to it, just select the files you want to send with the checkboxes (**1a**). By default, they are already selected. Select the option ***Zip attachments*** (**1b**) if you want to send them as an attached zip file.

It is possible to add other files from your local PC or network. In that case, browse to the file and select it. Then click on the button Add (**2**) to add the file to your e-mail.

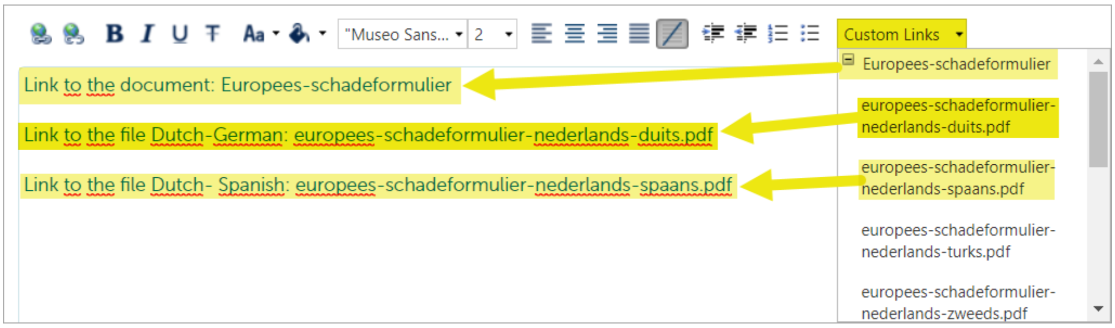
Send mail with files as an attachment to users who do not have access to the DocRoom system.



7.3.1.2 Send a mail with a hyperlink to the Document or the files in DocRoom

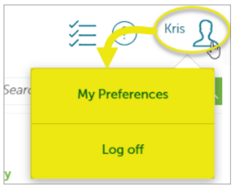
It is also possible to send hyperlinks to the DocRoom document to a user:

- Click on the option ***Custom links***.
- The link to the document is show, beneath it you see the links to the files of the document.
- Click on one of the Custom links. They will be copied to the body of the mail (to the place where your cursor is located).



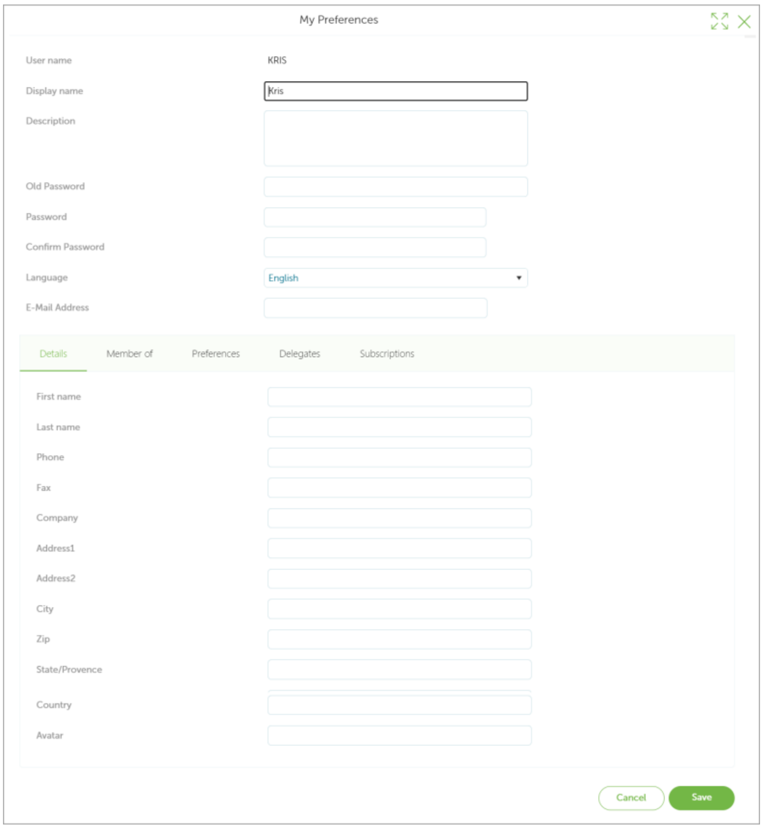
Send mail with links to users who have access to the DocRoom system. This way, you don't have to send large messages and the user will always see the most current version of the document or file.

8 User settings & preferences



Click on the avatar in the navigation bar and then click the ***My Preferences*** button to view your preferences.

The ***My Preferences*** window will pop-up. The window shows the main information with below it 5 tabs: **Details, Member of, Preferences, Delegates** and **Notifications.**

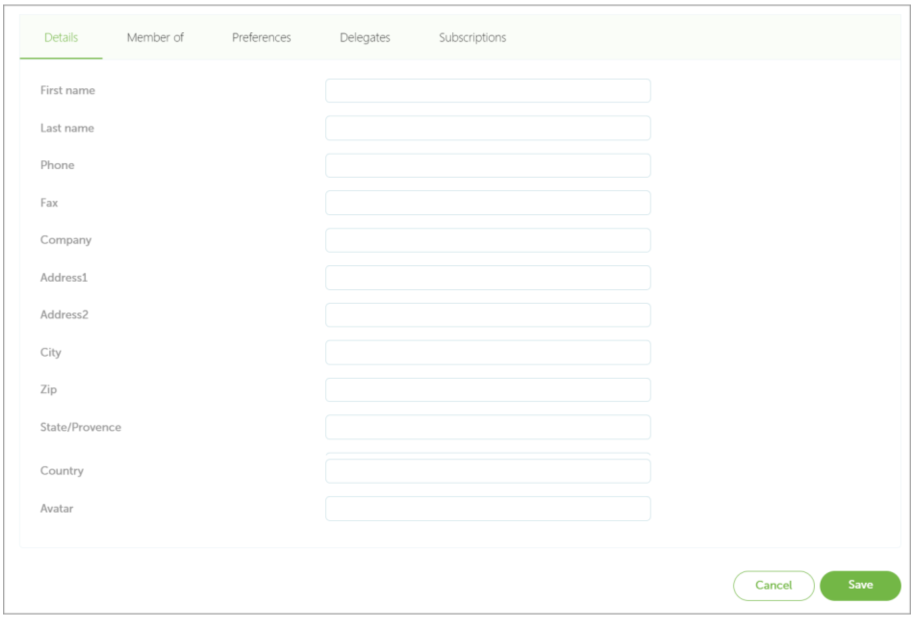


8.1 Main info

The main info appears above the tabs and shows the most important user information:

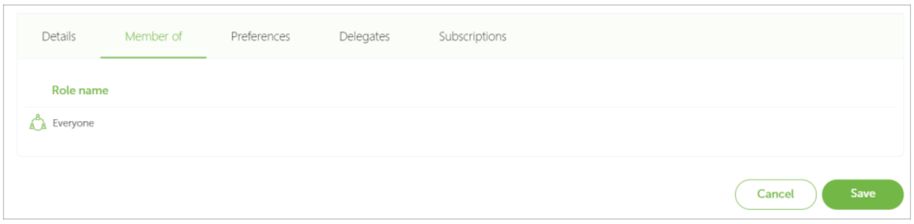
Item	Description
Username	the name that is used to log in. Cannot be changed.
Display name	name that is shown in the navigation bar. Can be changed.
Description	Description of the user.
Old Password	field that is to be used when replacing the old database user password. This field cannot be used to change your network login password.
Password	the password that is used to log in with a database user. Can be changed.
Confirm Password	field that is to be used when replacing the old database user password. This field cannot be used to change your network login password.
Language	the language of the interface for your user. Can be changed.
E-Mail Address	your E-mail address. This is used when the system will send mail messages to your user. It is also used when you send mail messages from the system: your mail address will then be pasted into the ***From*** field of your mail message.

8.2 Tab Details



Here you can enter extra user information.
This information is by default not used by other functionalities of the Doma application.

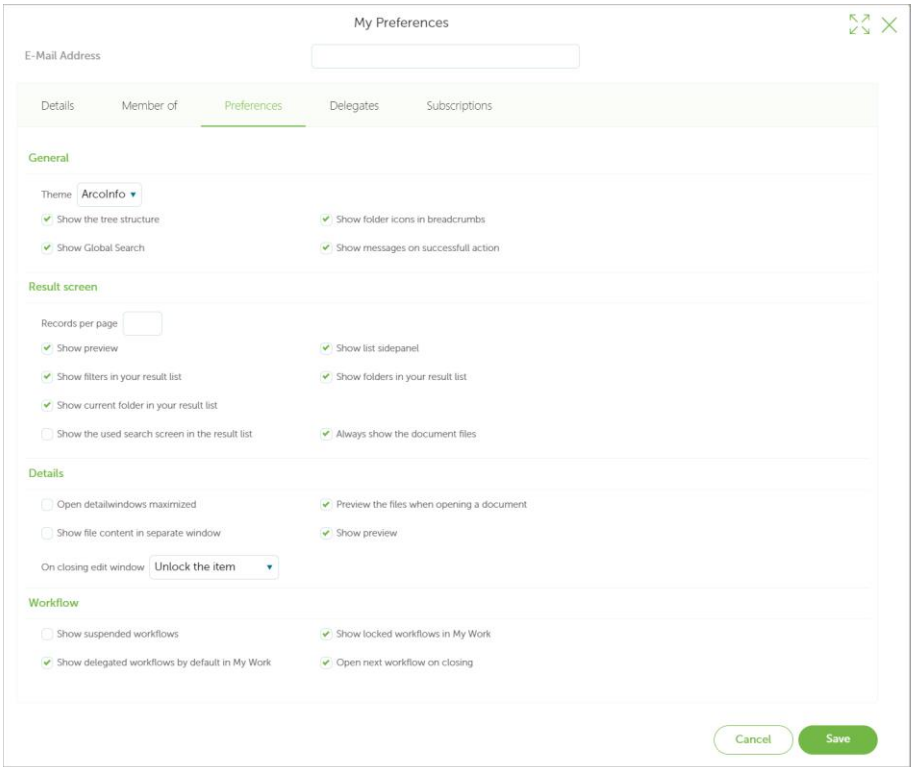
8.3 Tab Member of



This tab gives an overview of all the groups and roles of which your user is a member.

From here you can also add your user to other roles or remove your user from roles of which he is currently part (if you have enough rights to do so).

8.4 Tab Preferences



The preferences screen shows your personal user preferences.

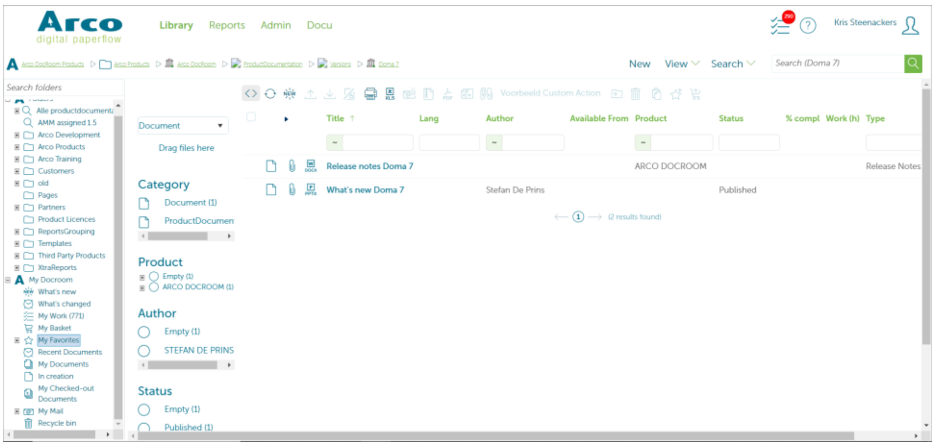
Changes made here will only influence the look & feel of your personal interface.

8.4.1 General

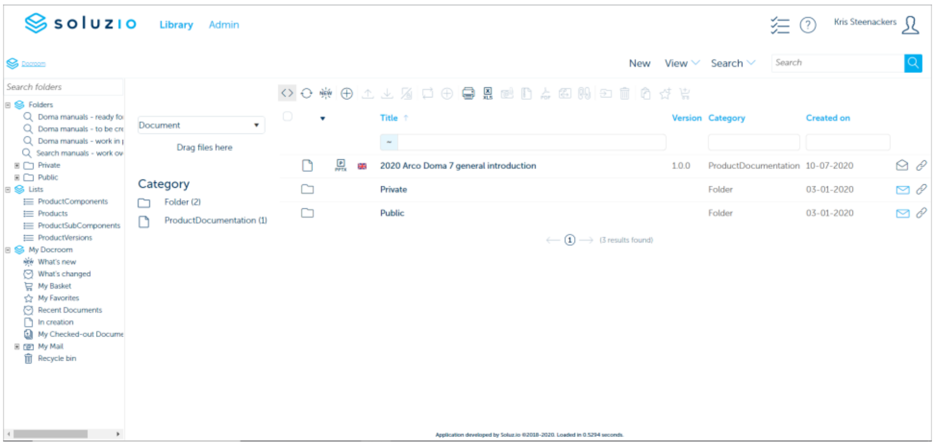
8.4.1.1 Theme: ArcoInfo – other themes can be shown

By default, the theme ArcoInfo will be selected. This is the default Arco theme.
A theme can influence the look and feel of the interface, e.g. by using different icons and fonts.

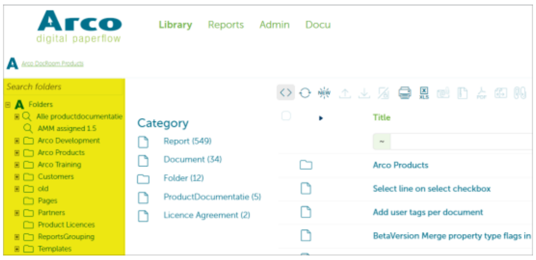
ArcoInfo



Soluzio



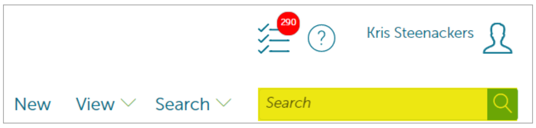
8.4.1.2 Show the tree structure

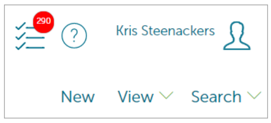


☑ Show the tree structure:
The tree structure appears in the left part of the screen.

☐ Show the tree structure:
The tree structure is hidden.

8.4.1.3 Show Global Search

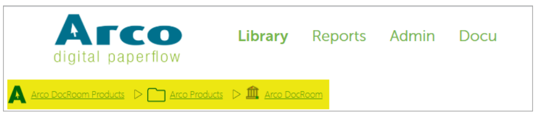


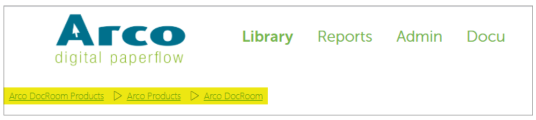


☑ Show Global Search:
The ***Global search*** field is shown.

☐ Show Global Search:
The ***Global search*** field is hidden.

8.4.1.4 Show folder icons in the folder structure



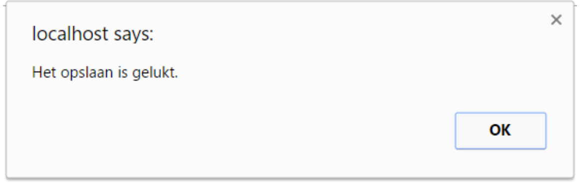


☑ Show folder icons in the folder structure
For each folder, an icon is shown in the breadcrumb function.

☐ Show folder icons in the folder structure
No folder icons are shown in the breadcrumb function.

8.4.1.5 Show messages on successful action

This setting suppresses all confirmation and feedback messages. When an action fails, the message will always be displayed to the user.



☑ **Show messages on successful action:**
The action performed is confirmed via a message.

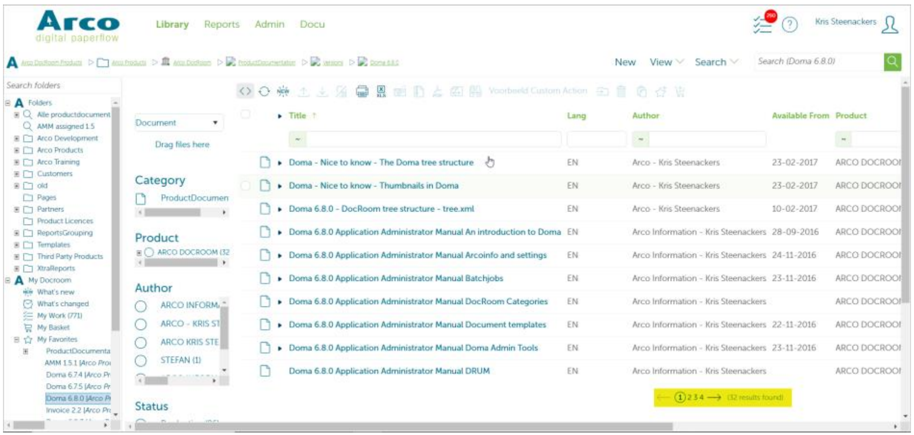
☐ **Show messages on successful action:**
The action performed is not confirmed via a message.

8.4.2 Result screen

8.4.2.1 Records per page

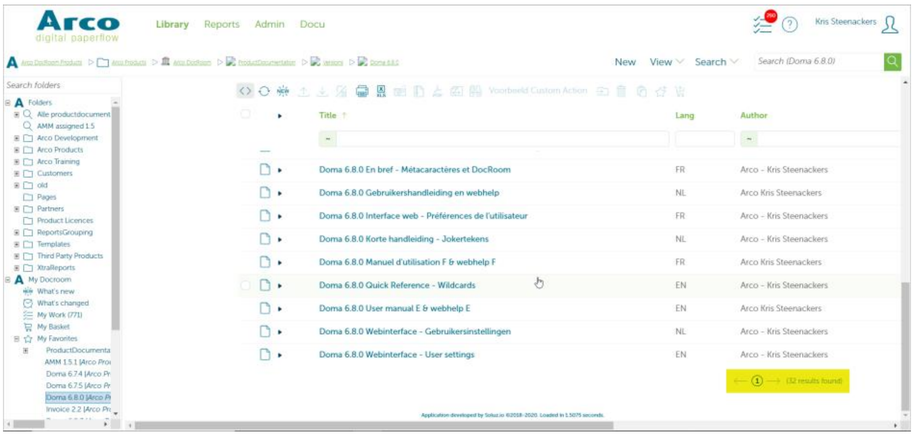
Displays the number of items displayed per page in DocRoom and Routing.
If there are more items than the number of results per page, they are distributed across different pages.
Max = 100

Records per page = 10



In this example, 32 records are shown on 4 separate pages, each of them showing maximum 10 records.

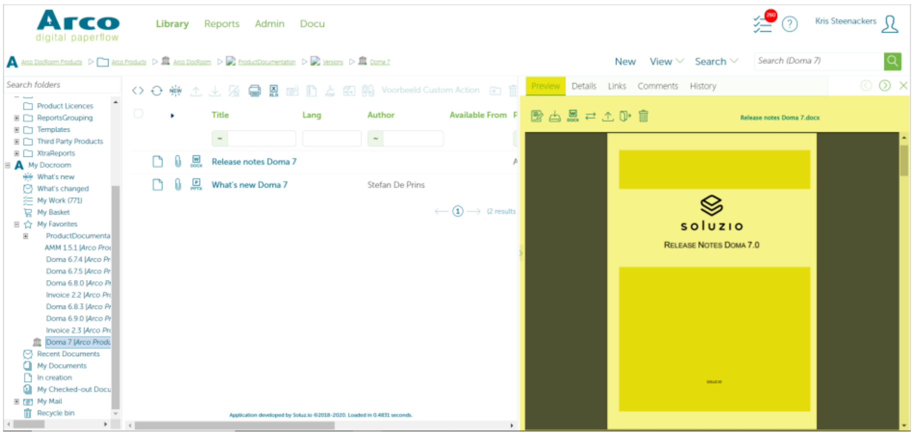
Records per page = 100



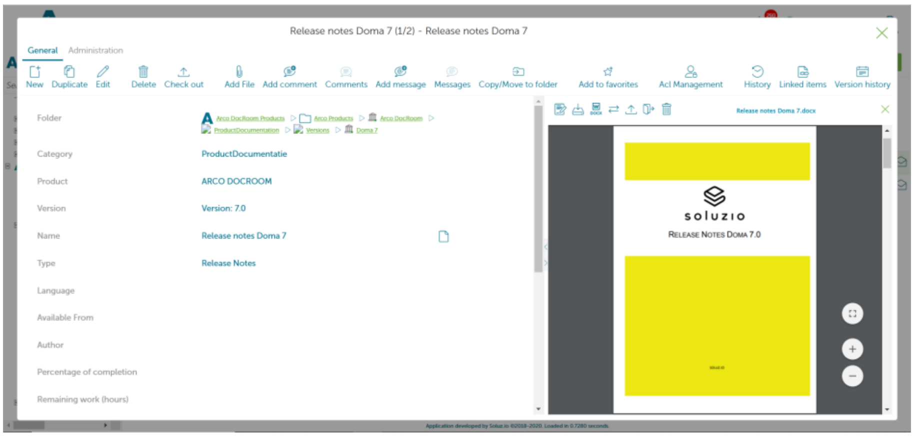
In this example, 32 records are shown on 1 page, which is showing maximum 100 records.

8.4.2.2 Show preview

☑ Show preview
When the document is clicked with the left mouse button, the preview tab appears on the right side of the screen.
With a double-click, the document opens in a popup screen. The details and preview are shown:

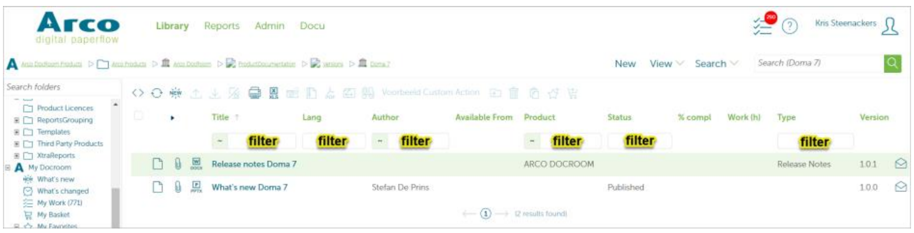


☐ Show preview
When the document is clicked with the left mouse button, the details and preview appear in a popup screen:

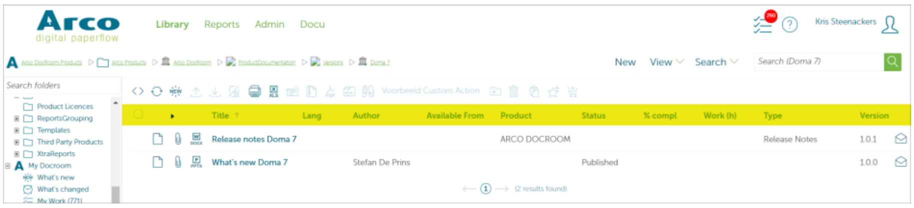


8.4.2.3 Show filters in your result list

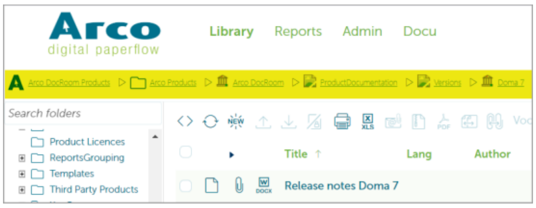
☑ Show filters in your result list
The filters above the columns in the results list of DocRoom and Routing are displayed. Filtering may include ***Relevance***, ***Version***, ***Title***, ***Category***, and ***Date***.



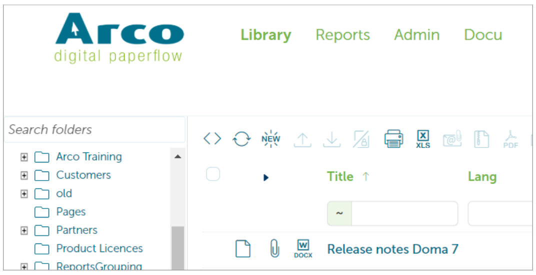
☐ Show filters in your result list
The filters above the columns in the results list are not shown.



8.4.2.4 Show current folder in your result list



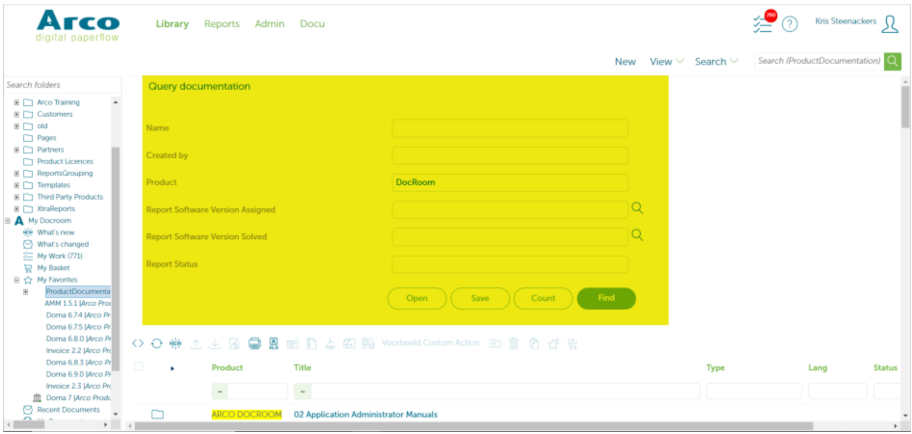
☑ Show current folder in your result list
The breadcrumb function (horizontal navigation in the tree) is displayed above the results list.



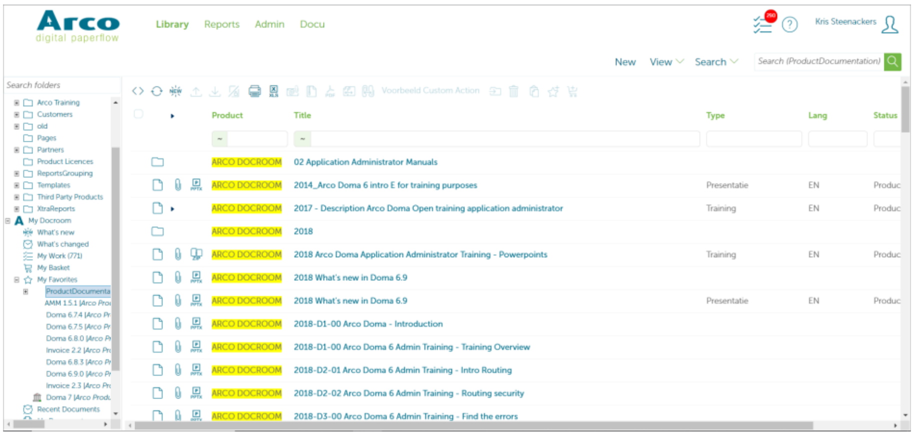
☐ Show current folder in your result list
The breadcrumb function (horizontal navigation in the tree) is not shown.

8.4.2.5 Show the used search screen in the result list

☑ Show the used search screen in the result list:
The search screen will remain visible above the results list:



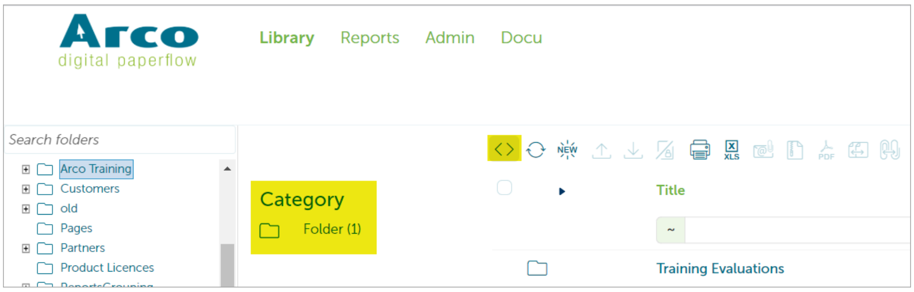
☐ Show the used search screen in the result list:
The search screen is not displayed above the results list.
After the search, the user will only see the results list.



8.4.2.6 Show list side panel

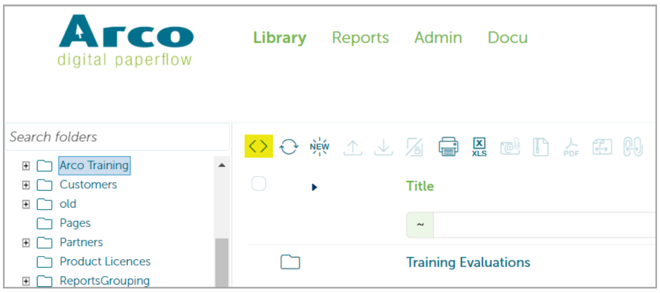
☑ Show list side panel

The side panel is shown by default.



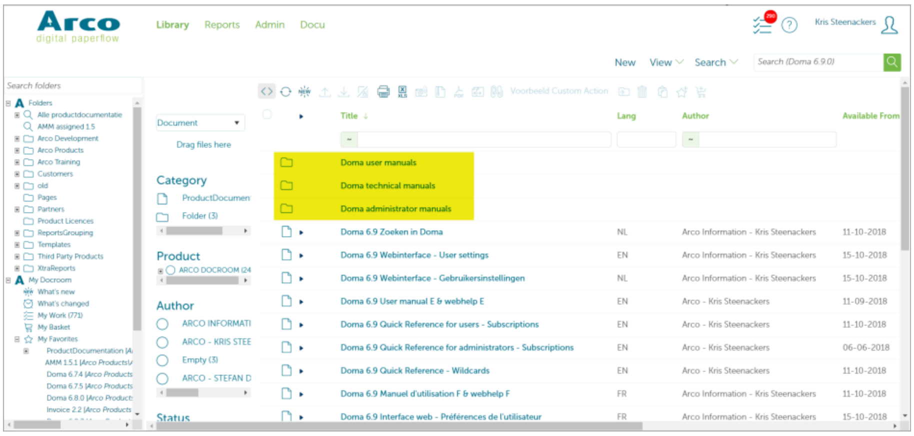
☐ Show list side panel

The side panel is hidden by default.

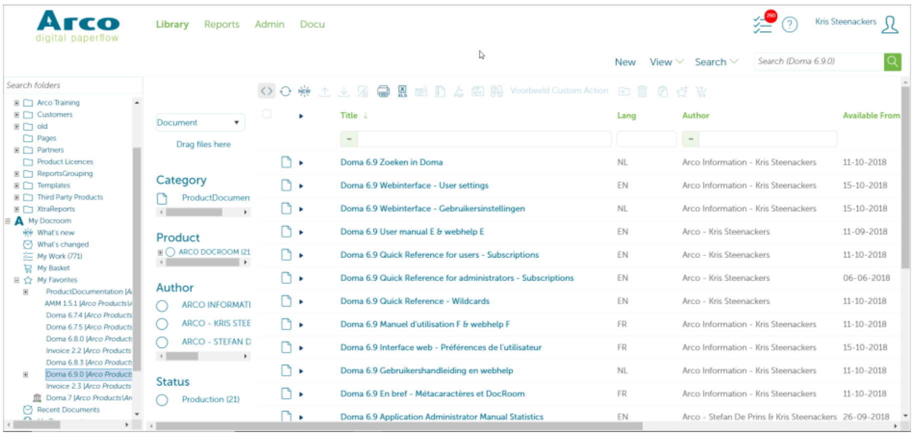


8.4.2.7 Show folders in your result list

☑ Show folders in your result list
The subfolders of the selected folder in the tree structure are shown in the results list.



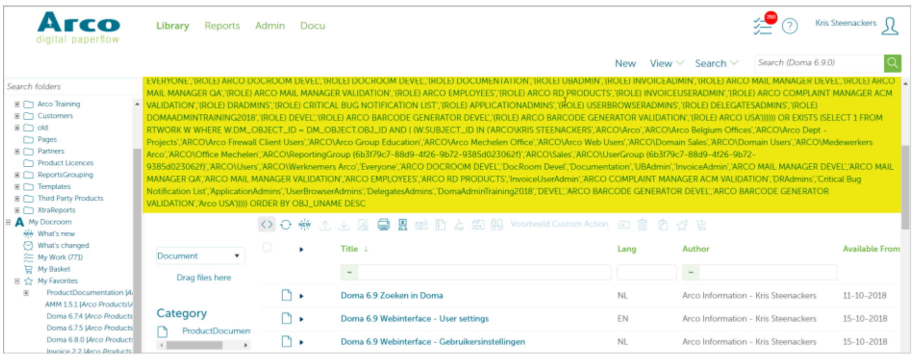
☐ Show folders in your result list
The results list does not show any folders.



8.4.2.8 Show the SQL-statement in the result list

(Only visible for administrators)

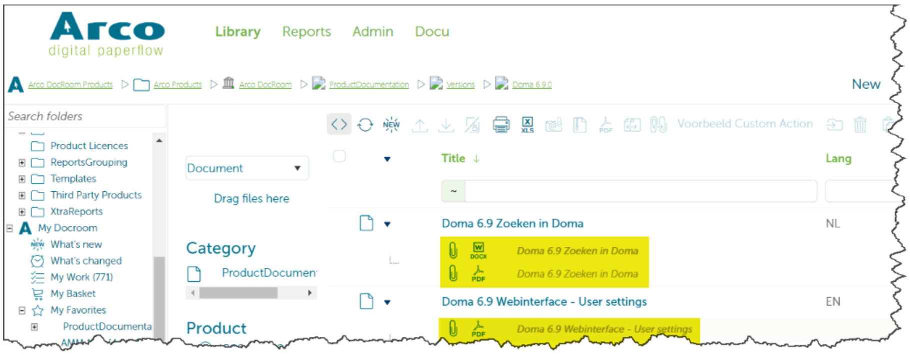
☑ Show the SQL-statement in the result list
The Database Select statement is displayed above the results list.



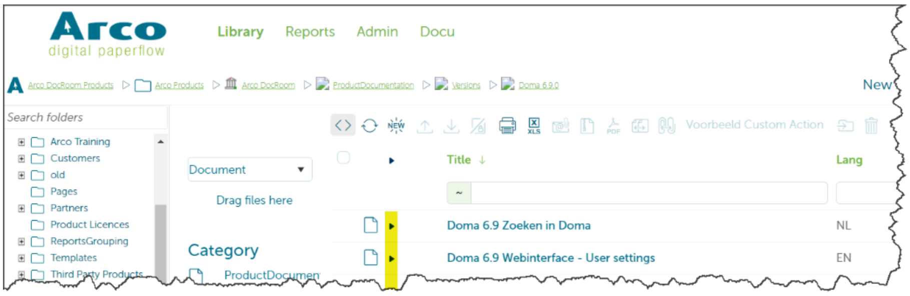
☐ **Show the SQL-statement in the result list**
The Database Select statement is not displayed.

8.4.2.9 Always show the document files

☑ **Always show the document files**
The files that are linked to documents are shown in the results list.



☐ **Always show the document files**
The files that are linked to documents are not shown in the results list. They are shown when opening the document detail.



8.4.3 Details

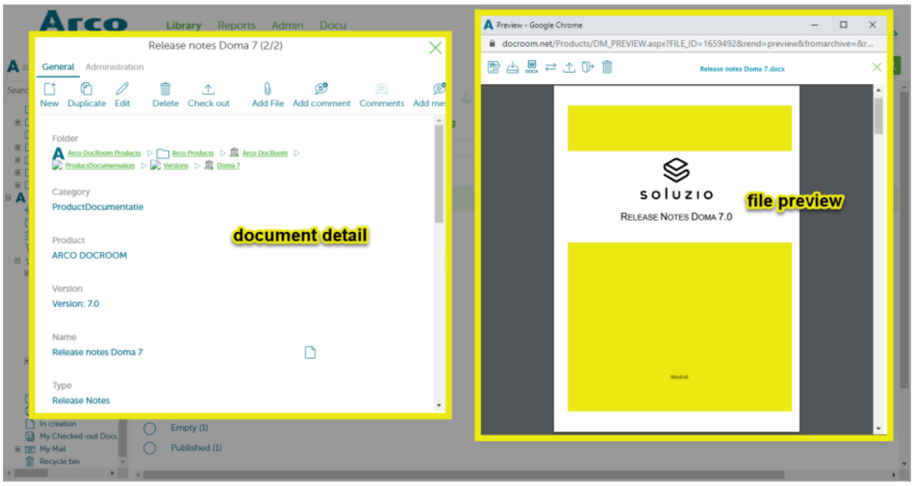
8.4.3.1 Open detail windows maximized

☑ **Open detailwindows maximized**
All detail screens (popup) are opened to the maximum size.

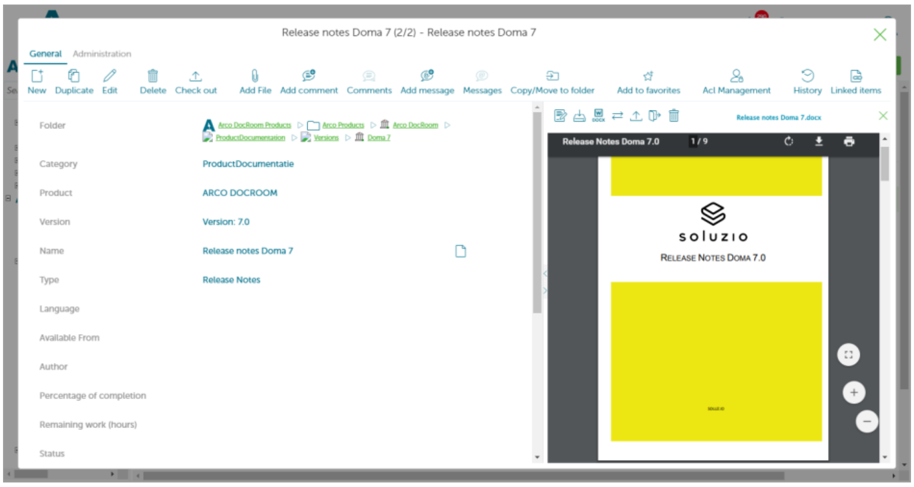
☐ **Open detailwindows maximized**
The details screens (popup) are not opened to the maximum size.

8.4.3.2 Show file content in separate window

☑ **Show file content in separate window**
When a user opens a file from the document detail, the preview will open in a separate window (popup).



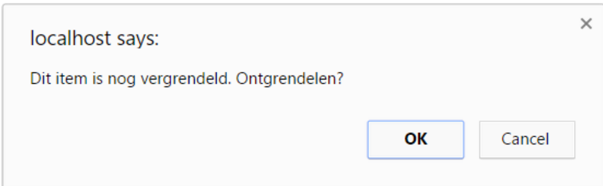
☐ Show file content in separate window
When a user opens a file from the document detail, the preview will open in the right panel (default setting).



8.4.3.3 On closing edit window

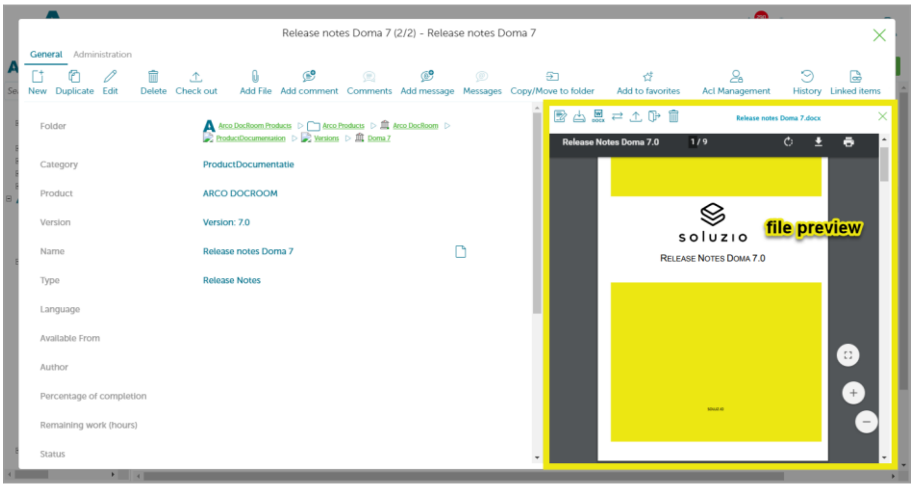
This setting affects the behaviour of the ***Close*** ☒ button at the top right of the detail screen.

Keep the item locked	Item is closed and stays locked.
Unlock the item	Item is closed and unlocked.
Ask	The user is asked if he / she wants to unlock the item.



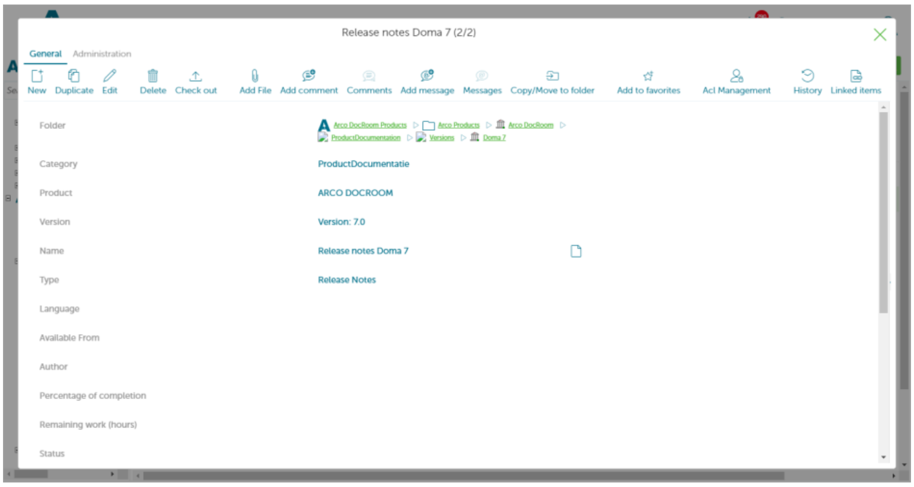
8.4.3.4 Preview the files when opening a document

☑ Preview the files when opening a document
The main file is automatically displayed in the right panel when the document is opened.



☐ Preview the files when opening a document

Only the metadata and the link to the file will be displayed when the document is opened in detail.

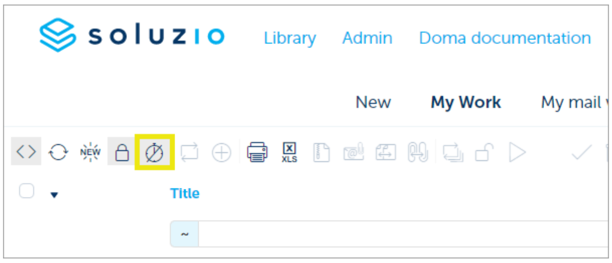


8.4.4 Workflow

8.4.4.1 Show suspended workflows

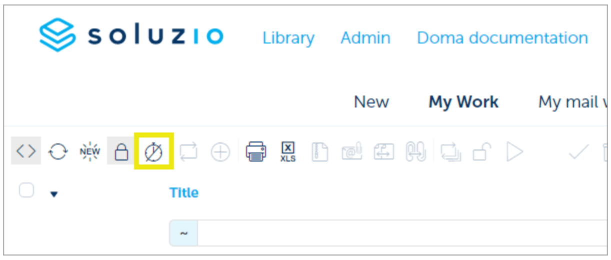
☑ Show suspended workflows
Suspended workflows are shown in the result list of *My Work*, *My workflows* and *Open workflows*.

When active, the show suspended workflows button has a grey background.



☐ **Show suspended workflows**
Suspended workflows are not shown in the result list of *My Work, My workflows* and *Open workflows*.

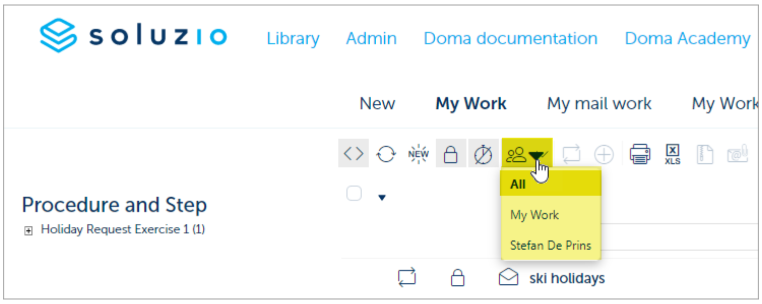
When inactive, the show suspended workflows button has a white background.



8.4.4.2 Show delegated workflows by default in My Work

☑ **Show delegated workflows by default in My Work**

Delegated workflows are shown by default in the *My Work* list.



☐ **Show delegated workflows by default in My Work**
By default, delegated workflows are not shown in the *My Work* list.

8.4.4.3 Show locked workflows in My Work

☑ **Show locked workflows in My Work**
Workflows locked by another user are shown in the ***My Work*** list. The locked workflows are recognizable by the locked icon.
By hovering over the icon, you can see which user has locked the object.

☐ **Show locked workflows in My Work**
Workflows locked by another user are not displayed in the ***My Work*** list.

8.4.4.4 Open next workflow on closing

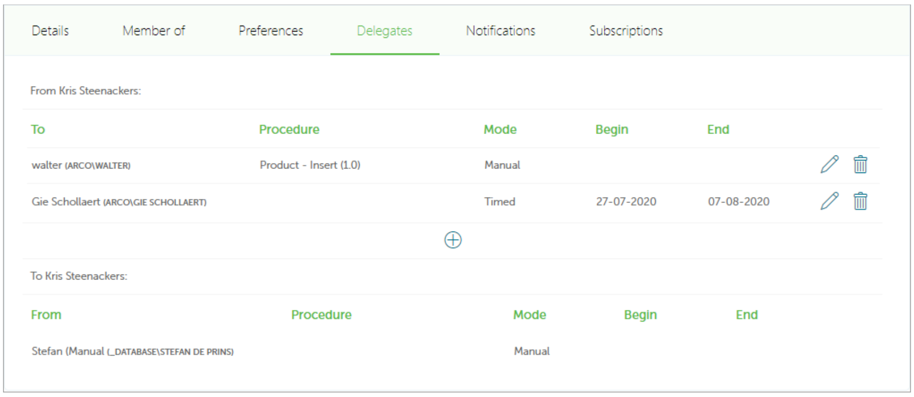
☑ **Open next workflow on closing**
When a workflow is terminated or forwarded to the next step, the system closes the detail of this workflow and automatically opens the details of the following workflow.

☐ **Open next workflow on closing**
When a workflow is terminated or forwarded to the next step, the system closes the detail of this workflow and displays the user's worklist.

8.5 Tab Delegates

In this part, users can delegate their Routing workflow list to other users.
When you delegate your work to another user, this user will see your work in his work list, so he/she can treat your work.

Work of your work list that has been treated by another user disappears from your work list.



Form this part, you can:

- see a list of the users/groups/roles to whom you have assigned your work list. (*From KRIS STEENACKERS* in the above example.)
- see a list of the users who have assigned their work list to your user. (*To KRIS STEENACKERS* in the above example.)
- delegate your Routing work list to another user. (Click on the icon □ to add a new delegation)

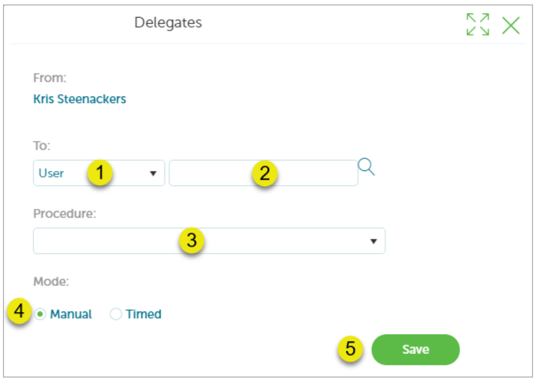
Description of the columns used in the Delegates screen:

Column name	Description
To	Name of the user to who you have delegated your work list.
From	Name of the user who has delegated his/her work list to you.
Procedure	Only items of this procedure are delegated to the user.
Mode	**Manual**: delegation is activated manually and will be ended manually. **Timed**: delegation is automatically started at the time mentioned in the column Begin and ended at the time mentioned in the column End.
Begin	Only completed if delegated in Timed mode. Indicates the start time of the delegation.
End	Only completed if delegated in Timed mode. Indicates the end time of the delegation.
	Click here to edit the delegation. A window will pop-up.
	Click here to delete the delegation. A confirmation message "Are you sure you want to delete this record?" appears. Click ***OK*** to confirm. The delegation will be removed.
	Click here to add a new delegation.

8.5.1 Delegate work to another user

- Open the tab ***delegates*** in ***the My Preferences*** window.
- Click on the icon **Add** □ of the ***Delegates*** tab.

- A new window appears.



- Select whether you want to assign your work list to a user, a role or a group in the dropdown list ***To*** (**1**).

- Then select the user, group or role in the field next to it. Enter the (a part of the) name of the user (group, role) and click on the magnifying glass next to the field. If only one item is found, it is immediately copied to the field, if there are more possibilities, a selection field appears. (**2**).

- If you want to limit the delegation to a certain procedure, then select this procedure in the field ***procedure*** (**3**). If this field is left empty, all your work is delegated to the user(s) in the *To* field.

- By default, the *manual* mode is selected in the field ***Mode*** (**4**). This means that the delegation starts on save and ends when you delete it. Select *Timed* to enter a start and end date. The delegation then starts and ends on the dates defined in the delegation.

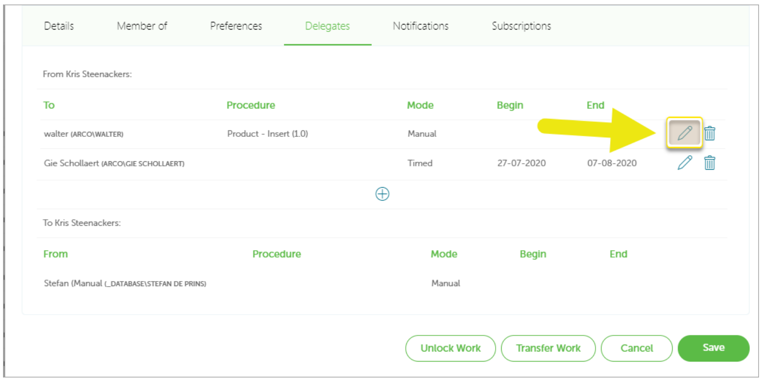
- Click on the ***Save*** button (**5**) to save your settings.

- The delegation is now shown in the overview in the list ***Delegated from me***.

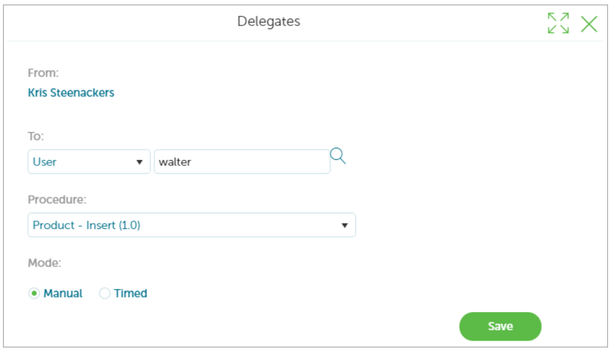
8.5.2 Edit a delegation

- Open the tab ***delegates*** in ***the My Preferences*** window.

- Click on the ***edit icon*** □ next to the delegation you want to change in the list *From [your username]*.

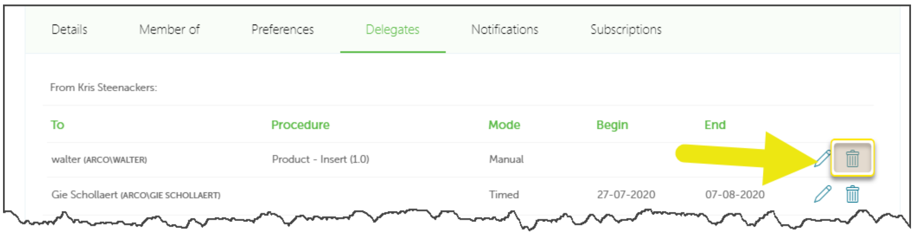


- The delegation details appear. Make your changes and save.

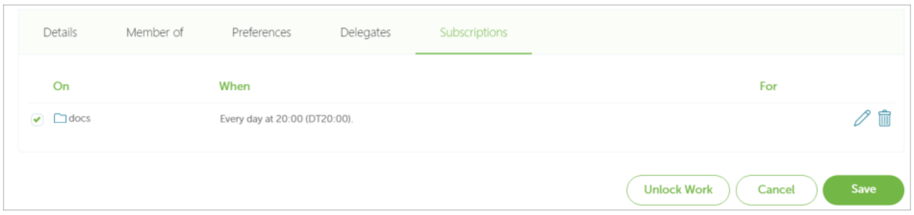


8.5.2.1 Remove a user from the list My delegates

- Open the tab ***delegates*** in ***the My Preferences*** window.
- Click on the ***delete icon*** ⍰ next to the delegation you want to delete in the list *From [your username]*.



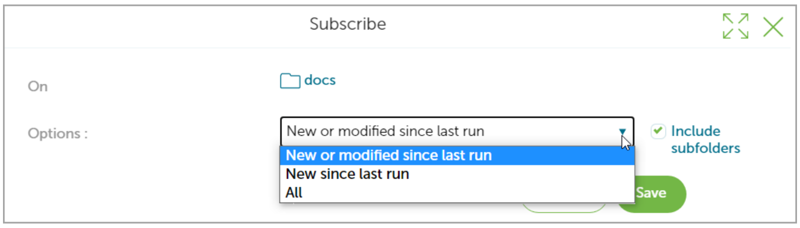
8.6 Tab Notifications



Here you can define whether you want to receive notifications from Doma.

If configured, Doma can send e-mail notifications to you at certain events.

Item	Description
Enable notifications	☑ Doma will send e-mail notifications to your user. ☐ Doma won't send e-mail messages to your user.
Select all	☑ All items of a list are by default selected. ☐ No items of result list are by default selected.



8.7 Buttons

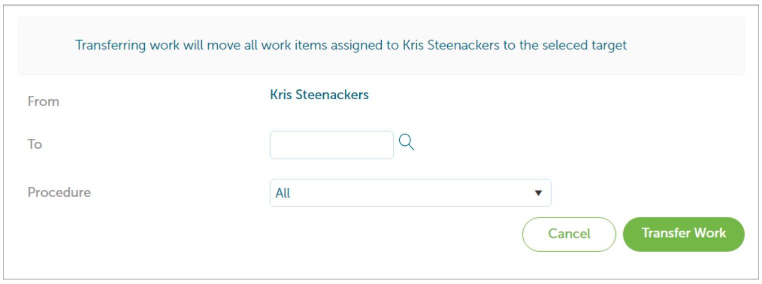
8.7.1 Button Unlock Work

Click here to unlock all your work.
(Administrators can do this for other users as well.)

8.7.2 Button Transfer Work

If you have sufficient rights, you can transfer work from your work list to another user:

- Select the user or role to whom you want to transfer your work.
- A transfer can be limited to work for a particular procedure. (To limit the transfer list, select the procedure in the dropdown list *Procedure*.)
- Click on the button Transfer work.
- After transfer, the work has disappeared from your work list. It will be available in the work list of the user(s) or role(s) where you have transferred the work to.



8.7.3 Button Save

Saves your changes.

8.7.4 Button Close

Closes the window.

9 Icons used in the Doma Web Interface

9.1 Icons representing documents, dossiers and workflows in the result list of the Web interface

Overview of the most important icons representing documents, workflow categories and procedures in the Doma Web interface result lists.

9.1.1 Icons in DocRoom Library

Case category in creation

Case category of which the procedure has ended *(Mind: in DocRoom 5 this was the icon for a document in creation when a procedure is used)*

Document in creation (also when a procedure is used to create the document)

Document when created and available for all users (who have sufficient rights)

9.1.2 Icons in Routing Workflow

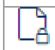
Active procedure (My work, my dossiers, open dossiers). *This can also be a procedure of a case category.*

Procedure that has ended (Routing Archive)

Workflow procedures cannot be found in the tree structure of the DocRoom Library.

9.2 DocRoom icons

9.2.1 Document status icons

Icon	Description	
	Document in creation	Items ***In Creation*** are items already created in DocRoom but not yet saved by the user who created it. Only the user who has created the item can see it.
	**File in creation**	
	**Folder in creation**	
	**Document in production**	An item with the status ***In Production*** is not checked-out by any user. You can be sure that you have the most recent version of the item. It is available for all allowed actions (e.g. edit, delete, ...)
	**File in production**	
	**Folder in production**	
	**Document in progress (checked-out by your user)**	Items checked-out by another user cannot be edited by another user. Users can only see a read-only copy of the most recent version. If you have checked-out the item, you can edit it. After edit, the item can be re-inserted as a new (sub)version.
	**Document checked-out by another user**	
	**File checked-out by your user**	
	**File checked-out by another user**	
	**Locked document**	The item is locked and edited by someone or by the system. Administrators can unlock items.
	**Locked folder**	

9.2.2 Document bar icons in the result list

Multiselect

Icon	Description
	Selection box. The selection box can be used to select certain items to do an action on them. Actions are available in the result list toolbar.
	Selection box when the document has been selected.

Status

Icon	Description
	Document status: **in Production**. When a document is in Production it means that it is available. The previous version will be available.
	Document status: **Locked**. When a document is Locked it means that another user is editing the document. The previous version will be available.
	Document status: **Checked-out**. When a document has the status Checked-out it means that another user has checked-out the document for editing. The previous version will be available.
	Document status: **In Progress**. When a document has the status in Progress it means that you have checked-out the document.
	Document status: **In Creation**. This means that the document is created but not yet saved by the user who has created the document. The document will only be visible to the user who is creating the document.

Expand

Icon	Description
	All files but the main file are hidden; click on this icon to expand and show the other files of the document.
	All files are shown. Click on this icon to collapse and hide all but the main file.

Document - linked files

The file extensions can be configured from the Admin menu. (Settings/File Extensions)

Icon	Description
	This icon indicates a file extension that did not receive a specific icon.
DOC DOCX	File extension: word
RTF	File extension: rtf
TXT	File extension: txt
CSV	File extension: csv
XML	File extension: xml
BMP	File extension: bmp
GIF	File extension: gif
JPG	File extension: jpg
PNG	File extension: png
TIF	File extension: tif
HTM	File extension: htm
HTML	File extension: html

PDF	File extension: pdf
PPT PPTX	File extension: ppt or pptx
XLS XLSX	File extension: xls or xlsx
ZIP	File extension: zip.
EML	File extension: eml mail message
MSG	File extension: msg mail message
FLV	File extension: FLV
MOV	File extension: MOV
MP4	File extension: MP4
WMV	File extension: WMV
AVI	File extension: AVI

Read

Icon	Description
	Document is read.
	Document has not been read.

Link tome

Icon	Description
	Link icon. This icon can be used to link DocRoom items.

My Basket

Icon	Description
	Document is not selected in your basket. Click on the icon to add it to your basket. The icon will then change into .
	Document is selected in your basket. Click on the icon to remove it from your basket. The icon will then change into .

My favorites

Icon	Description
	Document is not selected in your favourites. Click on the icon to add it to your favourites. The icon will then change into .
	Document is selected in your favourites. Click on the icon to remove it from your favourites. The icon will then change into .

Comments

Icon	Description
	No comments are available for this document. Click on this icon to add comments.
	Comments are available for this document. Click on the icon to view the comments and/or to add new comments.

Version history

Icon	Description
	Click here to view the document version history. In a new window, all previous versions of the document and the files are shown.

Links

Icon	Description
	Click here to see the linked DocRoom items. In a new window, all linked items will be shown.

9.2.3 Document context menu icons

Icon	Label	Description
	Rename	Renames the document.
	Edit	Opens the document details in edit mode.
	Delete	Deletes the document.
	Check out	Will check-out the document.
	Check in	Will check-in the document.
	Unlock	Unlocks the document.
	Cancel check out	Will end the document check-out.
	Add File	Opens the file insert window to add a file to the document.
	Add Message	Will open an upload screen in which you can upload a message related to the object.
	Send by Email	Opens an e-mail screen. This allows you to mail a link to the document, files and/or the files as attachment.
	View Previous file versions	Opens an overview of all previous versions of the document and its files.
	ACL Management	Opens the **A**ccess **C**ontrol **L**ist, here you can edit the document security.

9.2.4 Document detail - toolbar icons

Icon	Tooltip	Description
	New	Create a new document. The default document insert screen will appear.
	Duplicate	Duplicate the current document. The new document is shown in edit mode. • Document name = Copy of *[name of the original document]* • All metadata are copied. • Files are not copied
	Edit	Opens the screen in edit mode.
	Save	Click here to save the made changes.
	Save and edit next	Save the changes, close the detail of the current document and open the next document in edit mode.
	Cancel	Changes on the document are not saved.
	Delete	Click here to move the document to the recycle bin.
	Check out	Check-out document. By checking out a document you can create a new version of this document.
	Check in	Check-in document. When the new version of the document has been created you can check-in this document to make the new version available for other users.
	Cancel check out	Cancel check-out. The document status will be restored to in production. No changes will be saved.
	Add file	Add a file to the document.
	Add mail	Add a mail message.
	Add comment	Click on this icon to add comments.
	Comments	Click on the icon to view the comments and/or to add new comments.
	Add message	Add an internal Doma message.
	Messages	Click on the icon to view the internal Doma messages and/or to add a new one.
	Copy/move to folder	Opens a window from where you can copy/move the document to another DocRoom folder.
	Add to favorites	Add item to your favourites.
	ACL management	View/change document security settings.
	History	Shows the actions done on this document.
	Linked items	Shows a list of all linked items.
	Version history	Opens an overview of all previous versions of the document and its files.

9.2.5 File icons in the result list

The file extensions can be configured from the Admin menu. (Settings/File Extensions)

Icon	Description
	This icon indicates a file extension that did not receive a specific icon.
DOC DOCX	File extension: word
RTF	File extension: rtf
TXT	File extension: txt
CSV	File extension: csv
XML	File extension: xml
BMP	File extension: bmp
GIF	File extension: gif
JPG	File extension: jpg
PNG	File extension: png
TIF	File extension: tif
HTM	File extension: htm
HTML	File extension: html
PDF	File extension: pdf
PPT PPTX	File extension: ppt or pptx
XLS XLSX	File extension: xls or xlsx
ZIP	File extension: zip.
EML	File extension: eml mail message
MSG	File extension: msg mail message
FLV	File extension: FLV
MOV	File extension: MOV
MP4	File extension: MP4
WMV	File extension: WMV
AVI	File extension: AVI

9.2.6 File icons shown in the document detail window

Icon	Description
	File status: in Production. This means that the file is available.
	File status: In progress: Checked-out by your user. This means that you have checked-out the file.
	File status: Checked-out by another user. This means that another user has checked-out the file.
	File status: in Creation. This means that the file is created but not yet saved by the user who created the file. Only the user who is creating the file can see it.
	This icon indicates a file extension that did not receive a specific icon.
W DOC W DOCX	File extension: word
RTF	File extension: rtf
TXT	File extension: txt
CSV	File extension: csv
</> XML	File extension: xml
BMP	File extension: bmp
GIF	File extension: gif
JPG	File extension: jpg
PNG	File extension: png
TIF	File extension: tif
HTM	File extension: htm
HTML	File extension: html
PDF	File extension: pdf
P PPT P PPTX	File extension: ppt or pptx
XLS XLSX	File extension: xls or xlsx
ZIP	File extension: zip.
@ EML	File extension: eml mail message
@ MSG	File extension: msg mail message
FLV	File extension: FLV
MOV	File extension: MOV
MP4	File extension: MP4
WMV	File extension: WMV
AVI	File extension: AVI

9.2.7 File icons in the document detail window - icons above the file preview

Icon	Label	Description
	Edit properties	Opens the file details in edit mode.
	Download	Download file to your local PC.
W DOCX	**Edit file with Word**	Edit file with the appropriate application.
	Replace file	Replace the existing file with a new one.
	Check out	Check the file out to edit it.
	Check in	Check the file back in and make the new version available in DocRoom.
	Cancel check out	Cancel file checkout.
	Delete file	Deletes the file.

9.2.8 Folder icons - tree structure

Icon	Description
	This icon indicates the root folders ***Folders*** and ***My DocRoom*** in the tree structure.
	This icon indicates a folder in the tree structure. Different folder icons are possible depending on the configuration of the folder type.
NEW	In *What's new* you can find a list of all documents/folders that were added during the current day. There is no limitation on the number of documents in this list.
	In *What's changed* you can find a list of all documents/folders that were changed during the selected day. There is no limitation on the number of documents in this list.
	Icon indicating the ***My Work*** folder. This folder gives access to your work from the workflow.
	Icon indicating the ***My Basket*** folder.
	Icon indicating the ***My Favorites*** folder.
	Icon indicating the ***Recent Documents*** folder. In this folder, you can find the documents/folders you have recently opened.
	Icon indicating the ***My Documents*** folder. This is your personal folder that was created the first time you logged on to the system.
	Icon indicating the ***In creation*** folder. This folder shows all items with *status in creation.*
	Icon indicating the ***My checked-out documents*** folder. This is the list of the documents/files you have checked-out.
	This icon indicates the ***My Mail*** folder. It gives access to the Inbox and sent items of the Doma Mail part.
	Icon indicating the ***Recycle bin*** folder. The items you have deleted will appear in the Recycle Bin. Depending on your user rights, you can remove the items you want to delete permanently from the Recycle Bin. You can restore an item by right-clicking on it and choosing the option ***Restore***.
⊞	Expand. Click here to show the subfolders in the tree structure.
⊟	Collapse. Click here to hide the subfolders of the folder.

9.2.9 Folder icons - result list

Multiselect

Icon	Description
	Selection box. The selection box can be used to select certain items to do an action on them. Actions are available in the result list toolbar.
	Selection box when the document has been selected.

Link tome

Icon	Description
	Link icon. This icon can be used to link DocRoom items.

My Basket

Icon	Description
	Document is not selected in your basket. Click on the icon to add it to your basket. The icon will then change into .
	Document is selected in your basket. Click on the icon to remove it from your basket. The icon will then change into .

My favorites

Icon	Description
	Document is not selected in your favourites. Click on the icon to add it to your favourites. The icon will then change into .
	Document is selected in your favourites. Click on the icon to remove it from your favourites. The icon will then change into .

Comments

Icon	Description
	No comments are available for this document. Click on this icon to add comments.
	Comments are available for this document. Click on the icon to view the comments and/or to add new comments.

Version history

Icon	Description
	Click here to view the document version history. In a new window, all previous versions of the document and the files are shown.

Links

Icon	Description
	Click here to see the linked DocRoom items. In a new window, all linked items will be shown.