ArchiDoc User's Guide

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1. Archidoc Overview.
2. Working with ArchiDocAdmin.exe
3. Working with ArchiDocClient.exe.

1. Archidoc System.

1.1. Overview

1.2. Architecture

1.3. Categories of users and Tools.

1.1. Overview

The success of business now heavily depends on effective document processing. EDocuStor line is state of the art document management solution for all type of business. In this line ArchiDoc represents simple and powerful document management desktop tool for Small Office / Home Office (SOHO). Its main features include:

1. Flexibility. You can apply different processing rules and policies to process document of particular business nature (like on-going project documents, or media files, or accounting data, or legal documents, etc.).

2. Accessibility. Qualified users can easily find and process specific documents using attached index set. EDocuStor (ORACLE) version offers secure Internet type excess from anywhere.

3. Security. All documents can be stored in encrypted databank, preventing unauthorized disclosure.

4. Reliability. ArchiDoc backup policy allows 100% document recovery in the case of system failure.

5. Office Integration. ArchiDoc System can be easily integrated into existing office environment. From final user's point of view it looks and acts as Windows Explorer. The difference is behind the scene - in functionality. Explorer manage unsecured file system, ArchiDoc makes this system hidden and secure.

1.2. Architecture.

All documents are stored in Databank. Databank consists of (one or more) logical partition -Libraries. Library is storage of the documents of the same business type (like on-going project documents, or media files, or accounting data, or legal documents, etc.). Main distinction that differs one library from another is the essence of document processing rules and policies. They include business specific indexes, attached to documents, and specific set of document templates. Index is the tool to accelerate and simplify processes of search and documenting. Template facilitates creation of document.

Such approach offers exceptional flexibility regarding management of any kind of documents.

To provide up-to-date security and accessibility features, ArchiDoc implements Domain paradigm. ArchiDoc's databank is physically divided into set of Domains - independent and non-overlapped collections of documents. All documents within domain are to be and may be processed by Work Group (Domain Users) designated to this domain. From one hand, it provides collaboration feature among work group members. From another hand, it provides needed security, preventing disclosure to non-members. Actually, Domain is virtually private databank for work group.

1.3.Categories of Users and Tools.

Process of document management includes 2 types of activities - document processing and databank support, that are accomplished by 2 corresponding categories of users - workgroup members and support team.

First group includes Domain Managers (one per domain) and Domain users (unlimited, may be 0). They use **ArchiDocClient**.exe tool.

Second group consists of preinstalled Databank Manager (one per installation) and Databank Administrators (unlimited, may be 0). They use **ArchiDocAdmin**.exe tool.

2. Working with ArchiDocAdmin.exe
2.1. User's interface.

2.2. Connecting to / Disconnecting from Databank

2.3. Library Management

2.4. Domain Management

2.5. Template Management

2.6. Managing Databank Administrators

2.1. User's Interface
2.1.1.   Main window.

2.1.2.   Library Management Window.

2.1.3.   Domain Management Window.

2.1.1. Main window (Desktop)
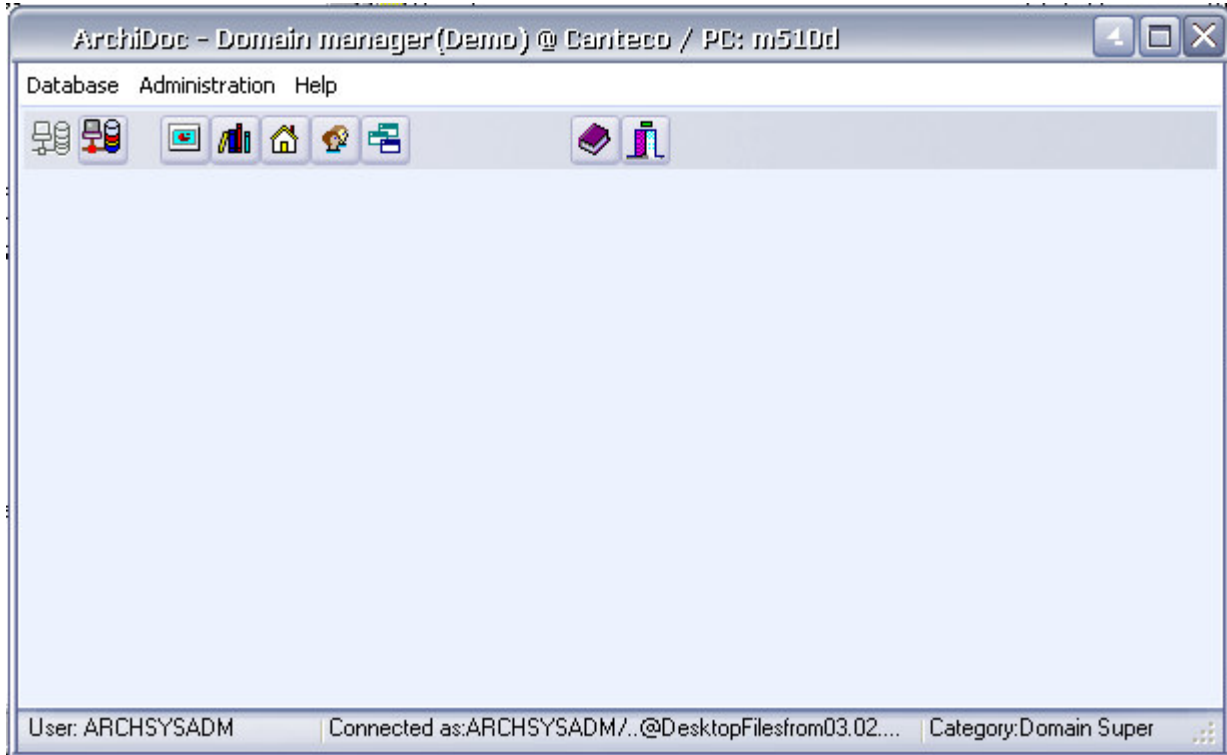
The Desktop contains:

Menu Bar – The menu bar provides access to the features and functions of ArchiDocAdmin.

Toolbar – Icons that give you access to the features used most often in ArchiDocAdmin. By holding the cursor arrow over an icon for a second, a short description of its function will appear in a balloon.

Status Bar – The status bar at the bottom of the ArchiDocAdmindesktop displays:

- Name of the user;
- Parameters of DB connection
- Log on time
- User category

2.1.2. Library Management Window.
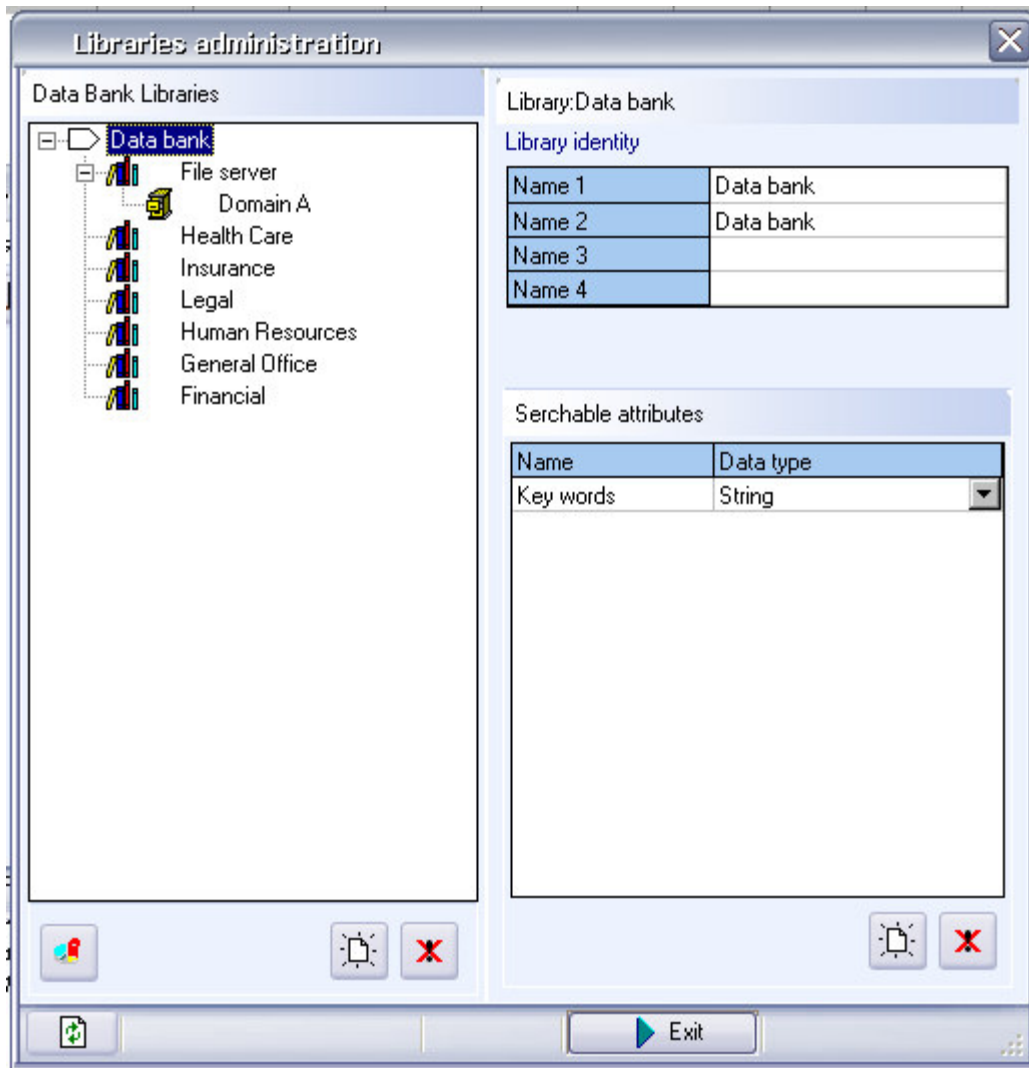
Library Management Window contains Databank tree view, 'Library identity' list and 'Searchable attribute' list.

Databank tree view displays library tree and domain drawers, that particular library contains.

When you select databank (Library) on tree view, corresponding Databank (Library) identity data and searchable attribute set are displayed on the lists and become available for modification.

2.1.3. Domain Management Window
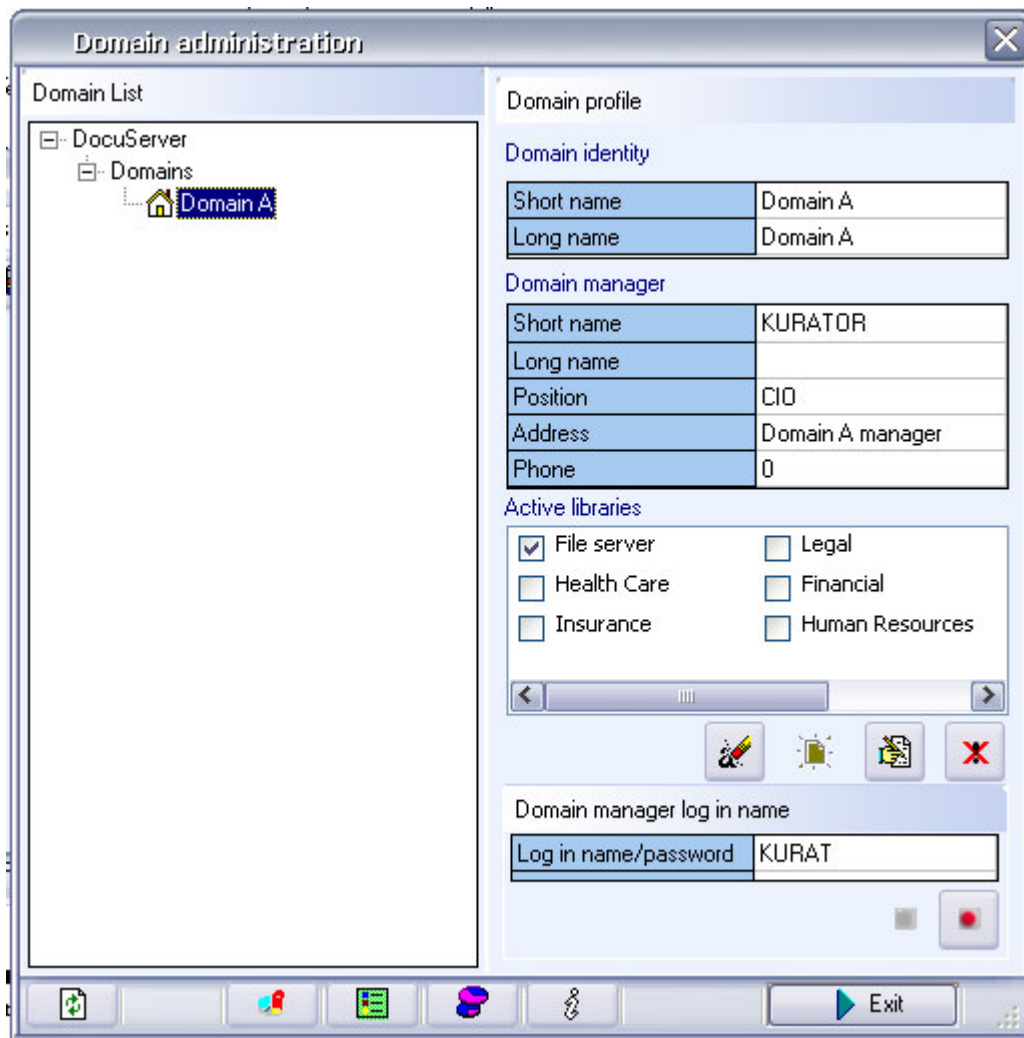
2.1.4. Template management window
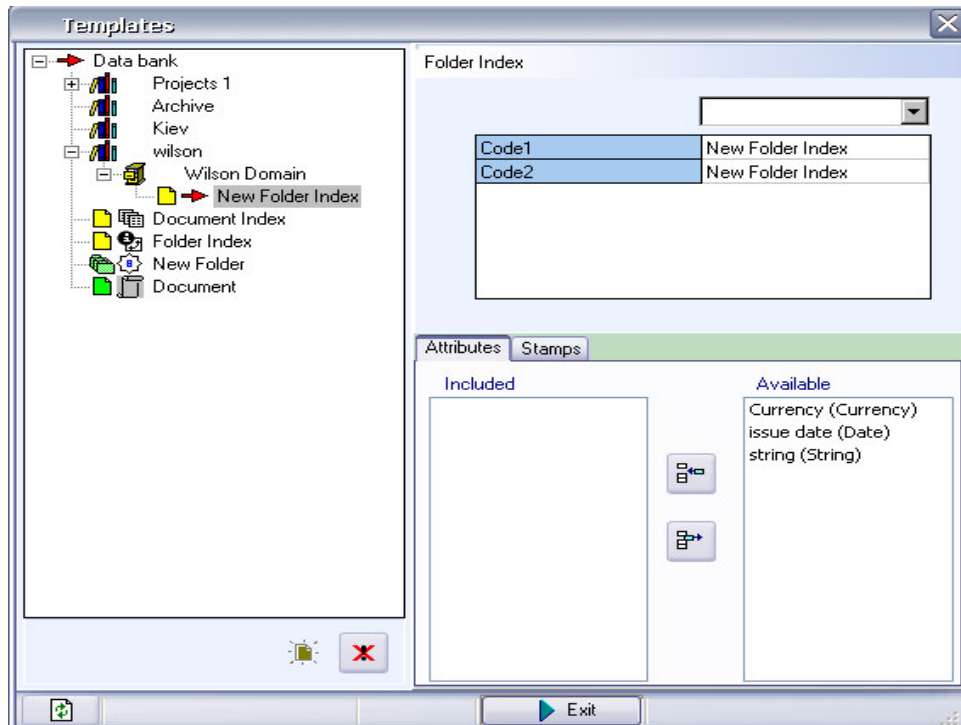
2.2. Connecting to / Disconnecting from Databank
To connect:

1. Click button 'Connect': .

2. Log on window pops up:

3. Type in User log name, password, select Databank and click 'Connect ' button. If entered data are correct, you will see main Desktop window.
> Note for ORACLE based system: Contact your ASP to get valid user name, password and database requisites.
> Note for Desktop system: The only option for Database is 'Desktop Files'.

To disconnect:

Click 'Disconnect' button .

2.3. Library Management:
New library is created to provide databank structure specific to certain industry. Inside library you can create specific folder and document templates and determine *searchable attributes* - set of parameters, which can be included into

indexes, attached to folders and documents. To work with libraries click 'Create/Delete/Edit Library' button on Tool bar. Library management Windows (2.1.2) pops up.

> NOTE: you can check the size of the selected library at anytime by clicking on the "DB Storage" icon.

Library Management consists of:

2.3.1. Library Management.

2.3.2. Searchable attribute management

2.3.1. Library Management
To Create New Libraries

Click 'New library' button . New library appears on databank tree view.

To Modify Libraries
1. Select library on databank tree view.
2. Modify names in the 'Library identity' list.
> Note: Changes are applied when you move focus to another cell of this list.

To Delete Libraries
1. Select library on databank tree view.

2. Click on the "Remove Library" button. Library disappears from tree view

2.3.2. Searchable attribute management
> Note 1: You can provide searchable attribute set for (A) databank and/or for (B) library. In case (A) attributes included into set will be available for any document / folder throughout all databank. In case (B) attribute will be available throughout particular library.

Note2: When you select Databank (Library) on tree view, corresponding attribute set is displayed on 'Searchable Attribute' list and become available for modification.

To Add New Attribute

Click 'New attribute' button . New attribute appears on 'Searchable Attribute' list.

To Modify Attribute Name

Edit corresponding cell in the first column of 'Searchable Attribute' list.

Note: Changes are applied when you move focus to another cell of this list.

To Modify Attribute Data Type

Select appropriate data type from corresponding combobox in the second column of 'Searchable Attribute' list.

Note: Changes are applied when you move focus to another cell of this list.

To Delete Attribute

1. Click on the 'Remove Attribute' button. A confirmation window pops up.
2. Click 'Yes' button. Attribute' disappears from 'Searchable Attribute' list.

2.4. Domain Management:

Domain is virtual private databank for domain users. Domain management consists of 3 parts: (2.4.1) Domain management and (2.4.2) Databank access management.

To work with domains click 'Domain management' button on Tool bar. Domain management Windows (2.1.3) pops up.

Note: Process of domain creation consists of the following steps:
- Creation of Domain as Databank entity, described by Domain identity data,
- Creation of Domain manager -member of domain's work group with special athority,
- Assigning of active libraries. At this step inside each library, checked as active, there created domain cabinet - topmost folder, that could be accessed by work group members.
- Granting databank access rights to Domain manager.

2.4.1. Domain management

To Create New Domain

1. Click 'Clear' button
2. Enter information for the domain i.e. name and information for domain administrator
3. Select the libraries that will be accessible through that domain
4. Assign a username for the domain
   Note: the password is the same as the username and is automatically assigned
5. Click "Create Domain" button.

To Modify Domain

1. On the tree view Select domain you wish to modify
2. Modify Domain identity data, and/or Domain manager data, and/or check/uncheck Active libraries.
3. Click 'Modify domain' button. Modified domain data apear on Domain management window.

To Delete Domains

1. On the tree view Select domain you wish to modify
2. Click 'remove domain' button. Confirmation window pos up.

3. Click 'Yes' button. Domain disappears from Domain management window.

2.4.2. Databank access management.

To Grant access to the Domain manager:

Note: You can grant access only if it was previosly revoked.

1. Enter User Name in the 'Log in name/password' edit box.

2. Click 'Register domain manager' button.

To Revoke access from the Domain manager:

Note: You can revoke access only if it was previosly granted.

Click 'Unregister domain manager' button.

2.5. Template Management

Template is a tool that facilitates process of populating the databank with new content. ArchiDoc allows to prepare simple (empty) folder/document templates, as well as, templates of arbitrary complexity (*Compound template folder*). Compound template folder, for example, could contain predetermined documents and/or subfolders. Subfolders in turn could contain documents and/or subfolders and so on.

Scope (visibility, usability) of the template is determined by the node of databank it is attached to.

Global Templates (templates attached to topmost nod -Data bank) can be used for creating new objects (folders and/or documents) throughout whole databank - inside any cabinet.

Library Templates (templates attached to the library - industry specific templates) can be used only inside any cabinet that belongs to said library.

Note: Each domain could have not more than 1 cabinet per library.

Cabinet templates (templates attached to the cabinet - customer specific templates) can be used only inside said cabinet.

Application **ArchiDocAdmin.exe** allows managing ***Global*** and ***Library Templates***. ***Cabinet template management***, due to their customer specific nature, is managed by Domain manager trough **ArchiDocClient.exe**.

Template Management window (2.1.4) is the same for both applications and is designed to manage indexes and templates.

Template Managemen consists of Index Management (2.5.1) and Template Management (2.5.2).

2.5.1 Index Management.

To create new index

1. Select Databank if you want to create **Global** index (or Library.   ) on template tree view and click 'New

    template/index' button. . 'Insert new' windows pops up

2. Select 'Folder index' ('Document index') from drop down menu and click 'OK' button. New index will be highlighted.
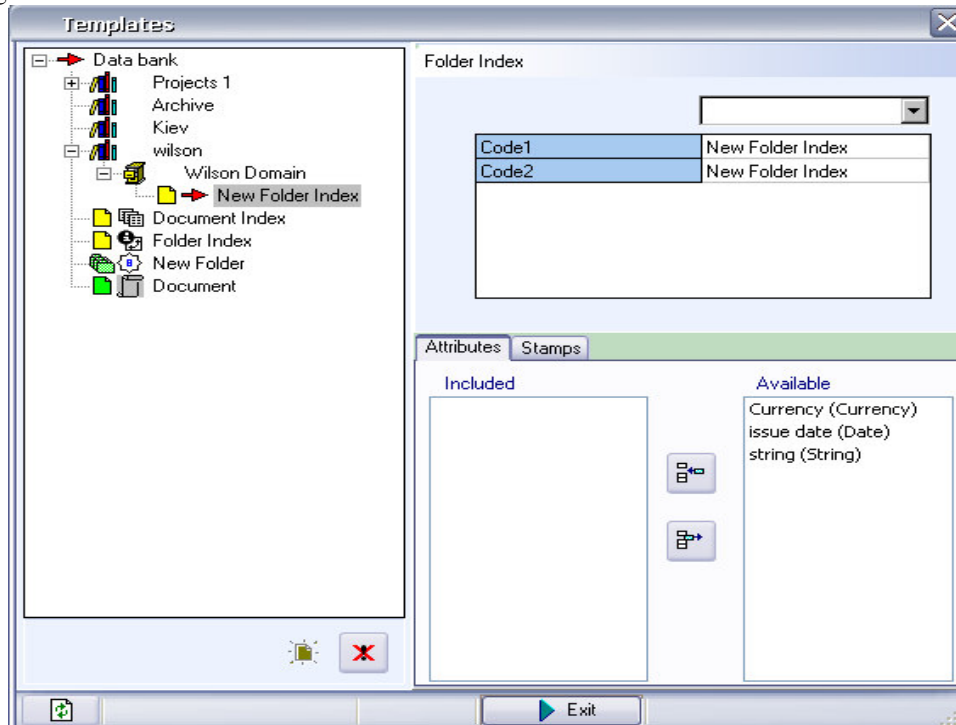
To modify index
1. Select index on template tree view.
2. To change icon: select from drop down menu.
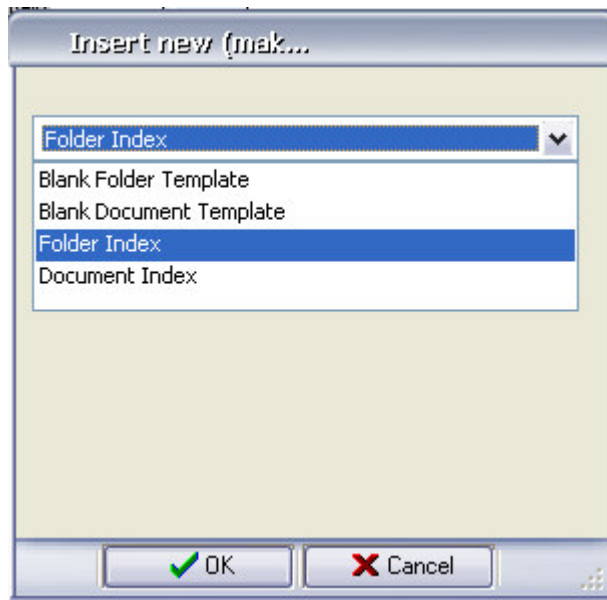3. To change display name and long name: type in boxes labeled by 'Code 1' and Code 2'.
4. To add parameter to optional descriptive attribute set: select parameter on 'Available' list under 'Attributes' tab and

   click 'Add attribute to index set' button   .
5. To remove parameter from optional descriptive attribute set: select parameter on 'Included' list under 'Attributes'

   tab and click 'Remove attribute from index set' button   .

6. To add signature attribute to optional signature attribute set: click 'New signature' button under 'Signatures tab. New signature attribute will appear on signature list view.

> Note: You may not add more than 2 signature parameters.
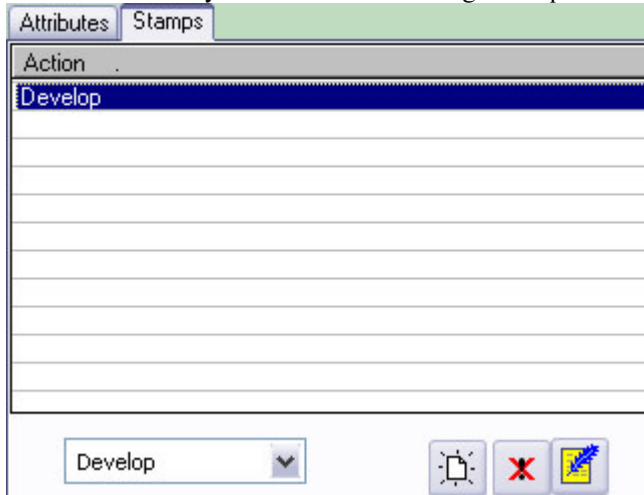
To modify signature label

1. Select signature attribute on signature list view, select proper name in 'Select due action' drop down menu

2. Click 'Apply' button .

To delete signature attribute from optional signature attribute set

1. Select signature attribute on signature list view

2. Click 'Remove signature' button .

To delete c index

1. Select index on template tree view.

2. Click 'Delete template/index' button. Warning message pops up:
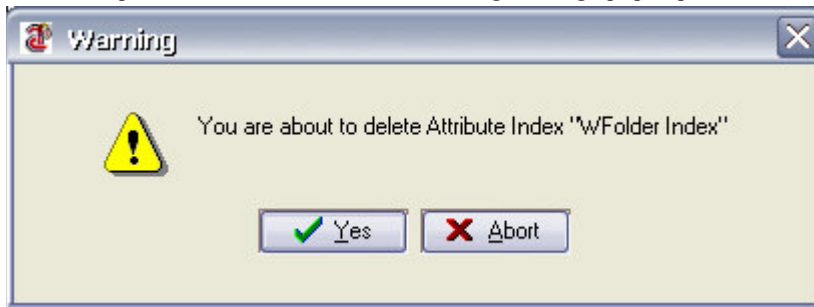
3. Click 'Yes' button.

2.5.2. Template management.

To create Template

1. Select cabinet folder on template tree view and click 'New template/index' button. . 'Insert new' windows pops up

2. Select 'Blank Folder template' ('Blank Folder template') from the drop down menu and click 'OK' button. New template will be highlighted.

To ModifyDocument Template

1. Select document template on template tree view.

2. To change icon: select from drop down menu.
3. To change display name: type in box labeled by 'Code 1'.
4. To upload file as new document template content:
5. Double click field labeled as 'Upload document'. Standard 'Open file' dialog pops up.
6. Click 'Open' button to start file transfer. 'Uploading.' message window pops up. Wait until transfer finished.
        Warning. Use 'Cancel' button on 'Uploading.' message windows cautiously!
7. To attach new index: select edit box labeled 'Document index' to activate drop down menu and select proper document index.

To Modifying Folder Template Attributes.

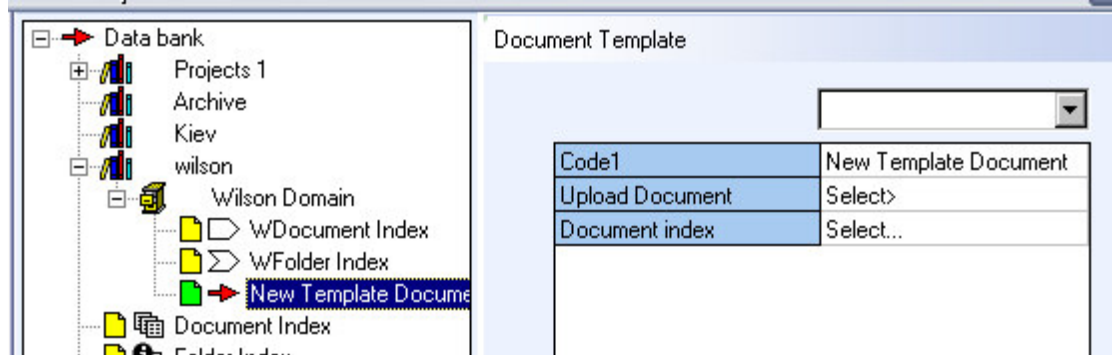1. Select folder template on template tree view.
2. To change icon: select icon from 'Select icon' drop down menu.
3. To modify main descriptive strings (fields labeled as 'Code 1' ‑ 'Code 4'): type in corresponding edits box.
        Note. String from edit box 'Code 1' will appear as Template name in tree view.
4. To attach new index: select edit box labeled 'Folder index' to activate drop down menu and select proper folder index.

To Modify Folder Template Structure

> Note: Besides simple folder template Archidoc allows to create compound template objects of arbitrary complex structure. Complex folder template may contain child folders and documents with arbitrary hierarchy. Complex template is created from simple folder template by populating with child folders and/or documents.

To add child object to the template folder:

1. Select folder template on template tree view and click 'New template/index' button. . 'Insert new' windows pops up.
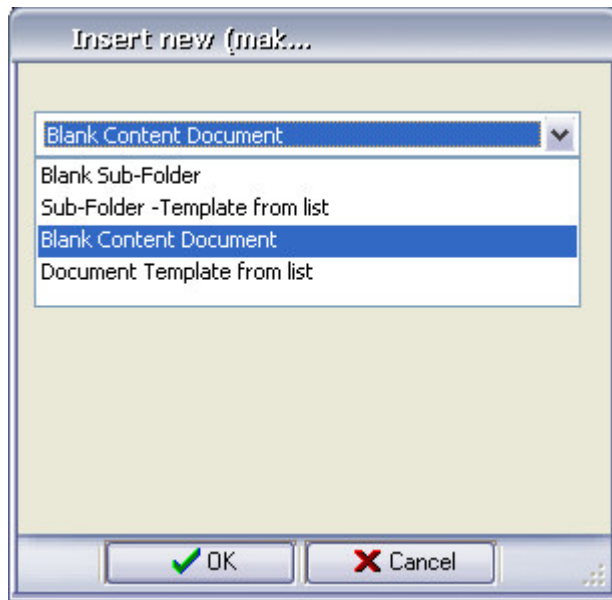
2. From drop down menu select type of object you want to insert as child.
   - If you want to insert blank document, select 'Blank Content Document'.
   - If you want to insert empty folder, select 'Blank Sub-Folder'.
   - If you want to insert existing template folder, select 'Sub-Folder Template from list".
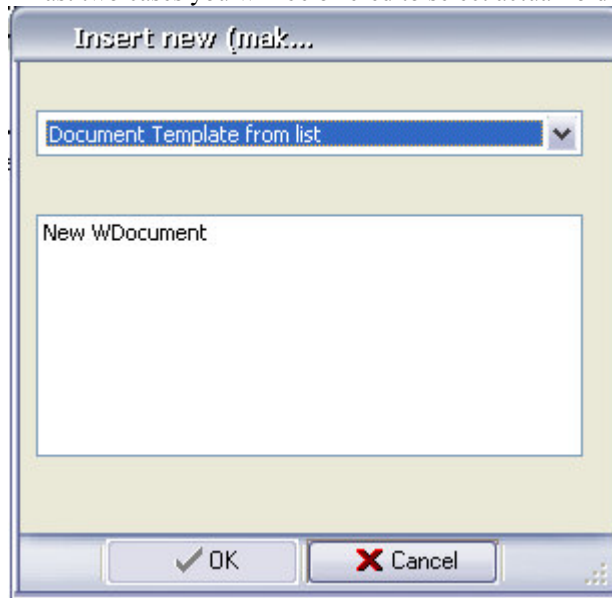   - If you want to insert existing template document, select 'Document Template from list'.
     In last two cases you will be offered to select actual folder or document template from emerging list

3. Click 'OK' button. New template structure will be highlighted.
   Note 1: You can modify child Blank Sub-Folders and Blank Content Document cases (i-ii) in the same way as you do it with templates itself.
   Note 2: Templates inserted as child object into template folder (cases iii-iv) will be displayed on tree view as shot cuts (references) to actual object. You cannot modify them.
   Note 3: When you create actual object in the Databank (new folder) you do it by coping one of template folders. Independently on type (real document/folder or short cut)
4. To remove child object from the template folder:
5. Select sub-folder (document, short cut) on template tree view.
6. Click 'Delete template/index' button.   Warning message pops up:
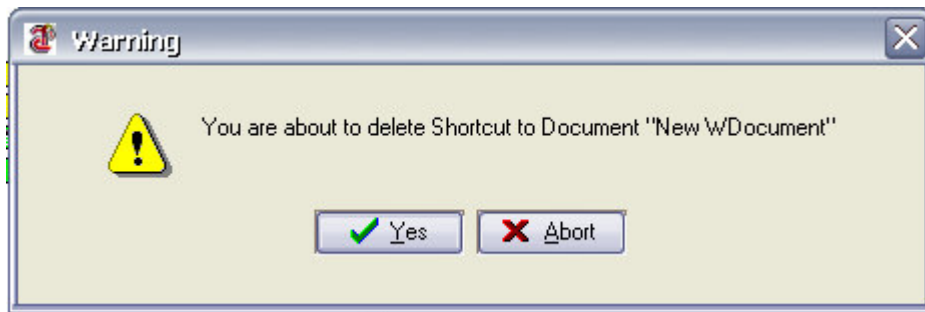
7. Click 'Yes' button. Modified template will be highlighted.

Removing of Folder (Document) Template

1. Select folder (document) template on template tree view.

2. Click 'Delete template/index' button. Warning message pops up:
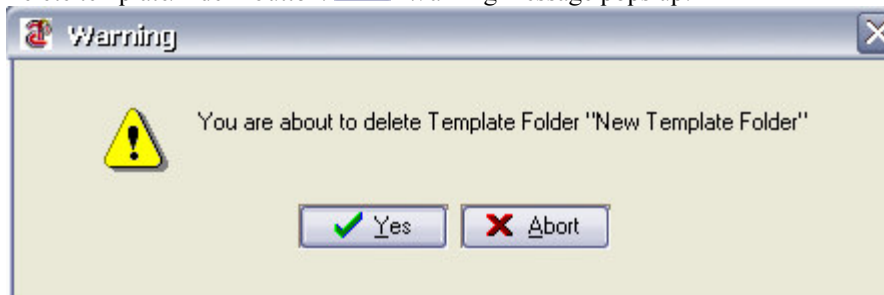
3. Click 'Yes' button. Modified template tree will be repainted.

2.6. Managing Databank Administrators (support team)

Support team management is accomplished by Databank manager by creating new users, modifuing end removing existing. User management is accomplished in the same way as described in p. 3.4. User Manager.

3. Working with ArchiDocClient.exe.

3.1. User interface

3.2. Working with Folders and Documents

3.3. Viewers and Editors Configuration

3.4. User manager

3.5. Security management

3.6. Template management
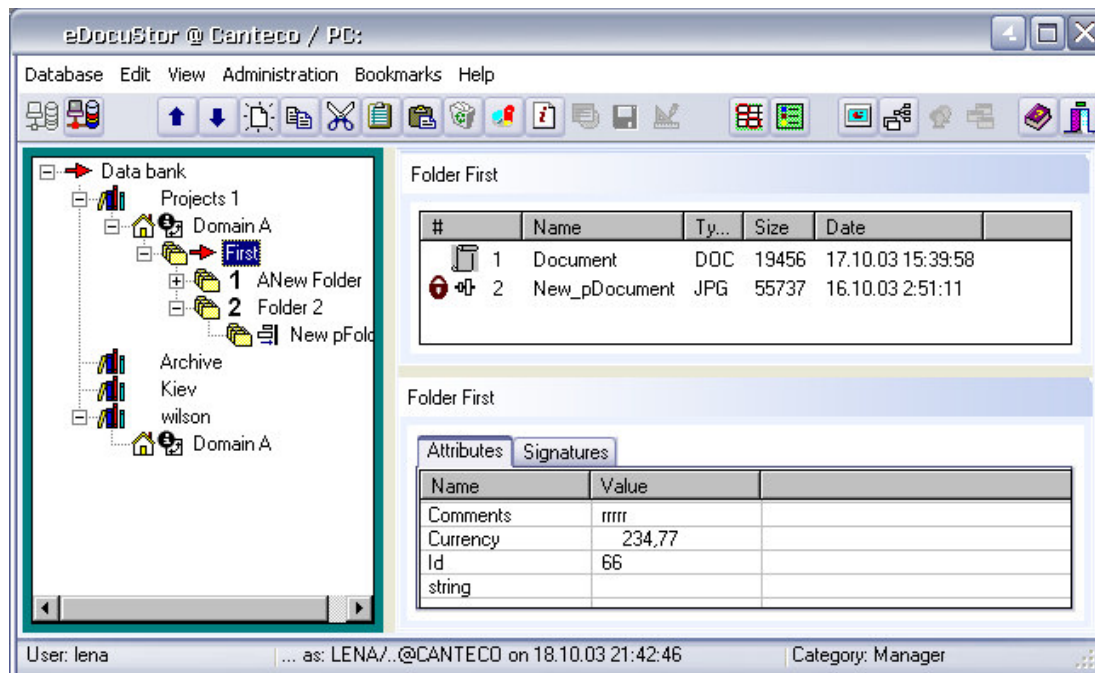
3.7. Search and Presentation

3.1. User Interface

2.1.1. Main window – Desktop.

2.1.2. New Folder/Document window.

2.1.3. Folder Properties Window.

2.1.4. Document Properties Window.

2.1.5. Quick viewer.

2.1.6. 'Viewers and Editors Settings' window.

2.1.7. User manager.

2.1.8. Security manager window.

2.1.9. Template manager window.

2.1.10. Search and Presentation Window.

3.1.1. Main window – Desktop.

The Desktop contains:

Menu Bar – The menu bar provides access to the features and functions of ArchiDoc.

Toolbar – Icons that give you access to the features used most often in ArchiDoc. By holding the cursor arrow over an icon for a second, a short description of its function will appear in a balloon.

Folder Tree Window – The Folder Tree Window appearing on the left side displays a graphic hierarchical tree of the Databank. Use the mouse to double-click on a Cabinet, Drawer, Folder or Subfolder to expand the tree below each level.

> Tip. Increase your productivity by using the right mouse button. Highlight a Cabinet, Drawer, or Folder and use the right mouse button to bring up a menu of commands that apply to that item.

Document Window – Click on a folder in the Folder Window and the top-right Document (Folder Contents) Window will display a list view of the documents contained in that folder.

Attribute Window – Click on a folder in the Folder Window (document in the Document Window) and the bottom right Attribute Window will display a list views of the Optional attribute, attached to selected folder (Document). Set of descriptive attribute will be displayed under 'Attributes' tab and set of signatures - under 'Signatures' tab.

Status Bar – The status bar at the bottom of the ArchiDoc desktop displays:

> Name of the user;
> Parameters of DB connection
> Log on time
> User category

3.1.2. New Folder/Document window.
See:

2.2.5. New Folder.

2.2.6. New Document.

To pop up 'New Folder/Document' window click button 'New'
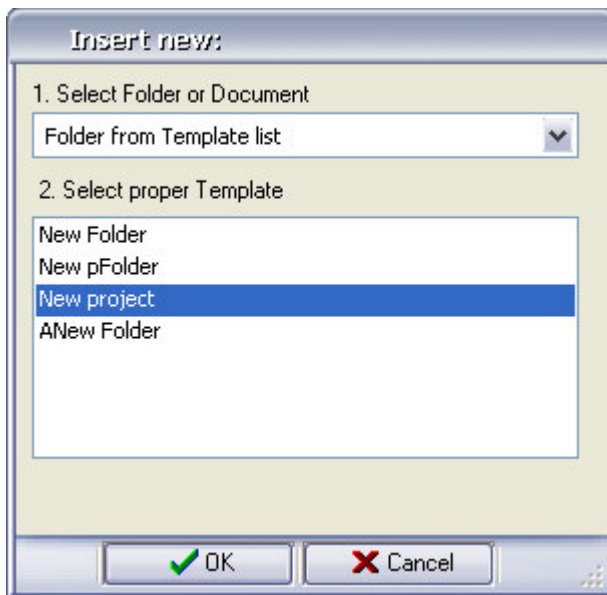
This window allows creating (based on selected template) new folder or documenting in the folder that is selected in databank tree view.

3.1.3. Folder Properties Window.
See:

2.2.9. Editing Folder Properties (Attributes).
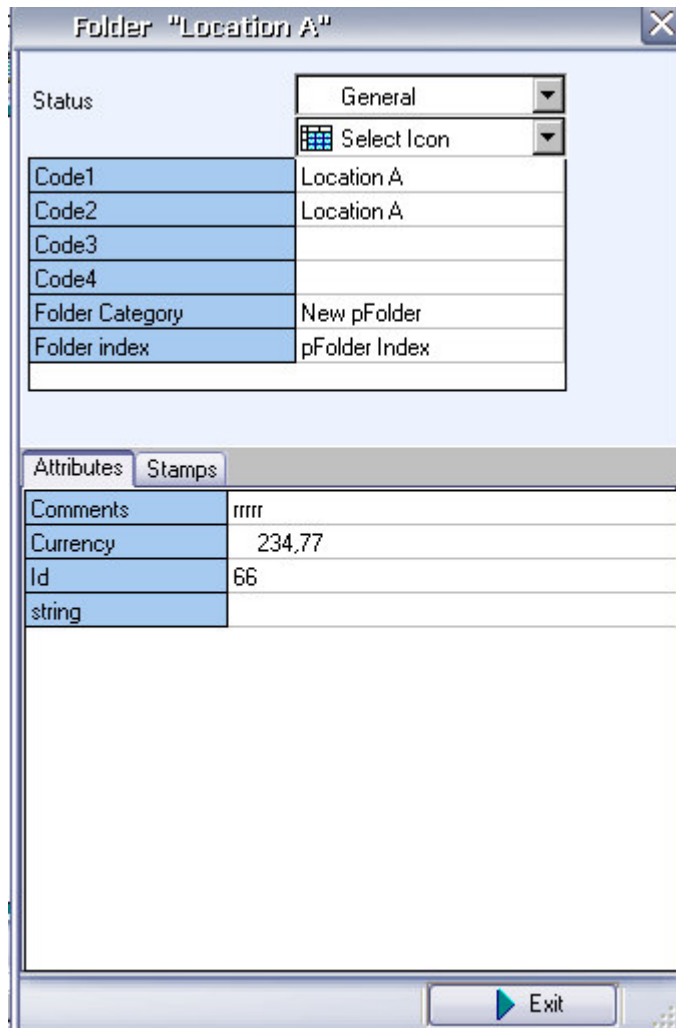
3.1.4. Document Properties Window.
See:

2.2.10. Editing Document Properties (Attributes) and Uploading Content.
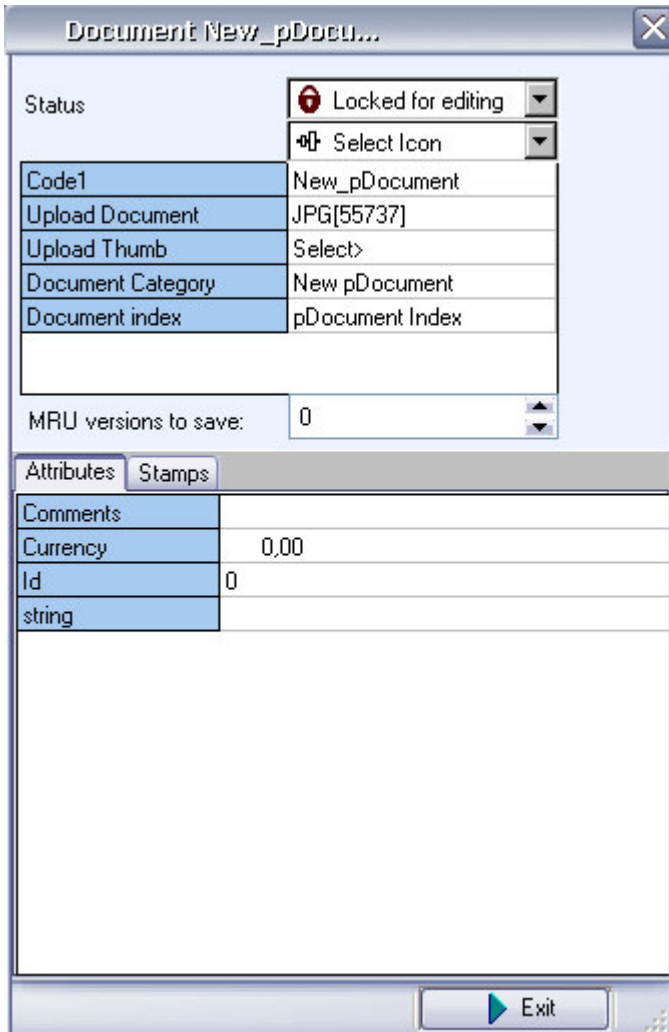
3.1.5. Quick viewer.
See:

2.2.11. Viewing the Document Content.
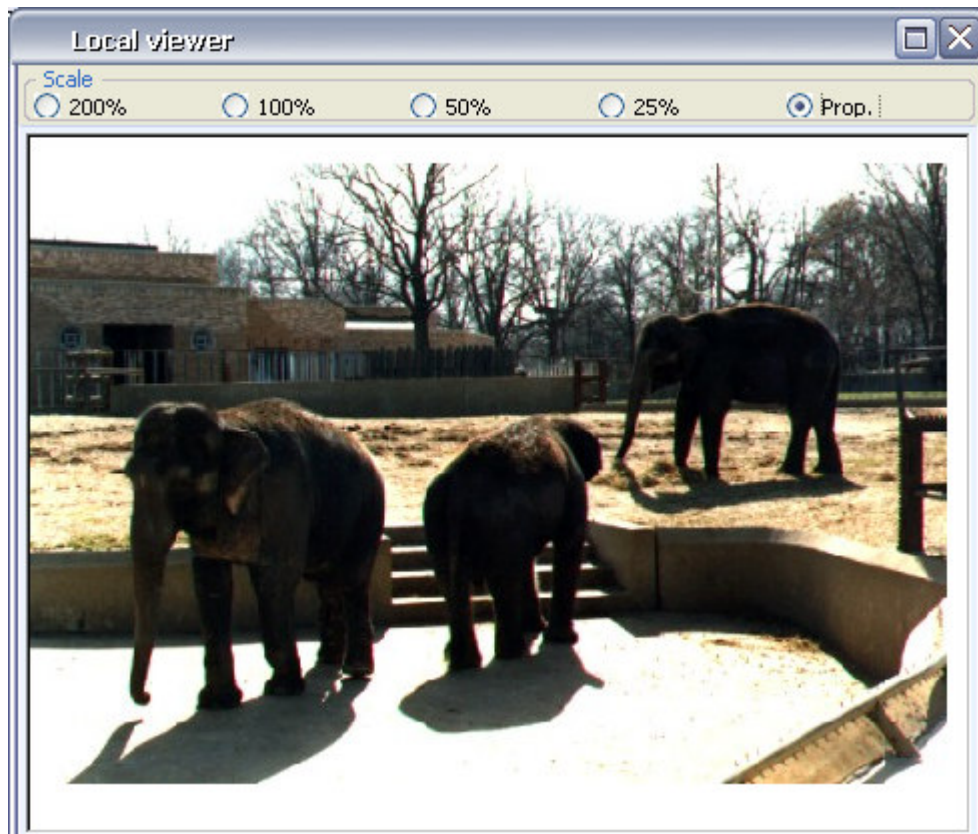
3.1.6. 'Viewers and Editors Settings' window.
See:

2.3. Viewers and Editors Configuration.

3.1.7. User manager window.
See:

2.4. User Manager.

3.1.8. Security manager window.

See:

2.5. Security Management.

3.1.9. Template manager window.

See:

2.6. Template Management.

3.1.10. Search and Presentation Window.

See:

2.8. Search and Presentation.

3.2. Working with Folders and Documents.

3.2.1. Connecting to / Disconnecting from Databank.

3.2.2. Navigate Databank.

3.2.3. Reordering Folders.

3.2.4. Reordering Documents.

3.2.5. New Folder.

3.2.6. New Document.

3.2.7. Showing (Hiding) Clip Board Window.
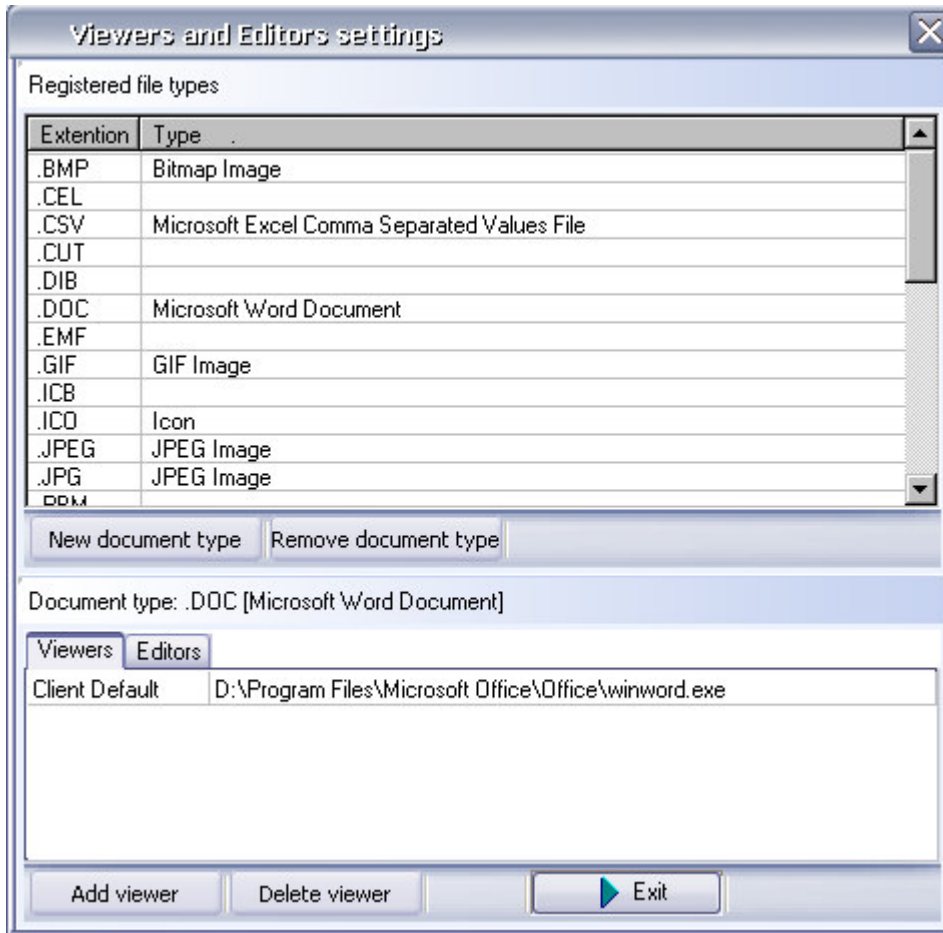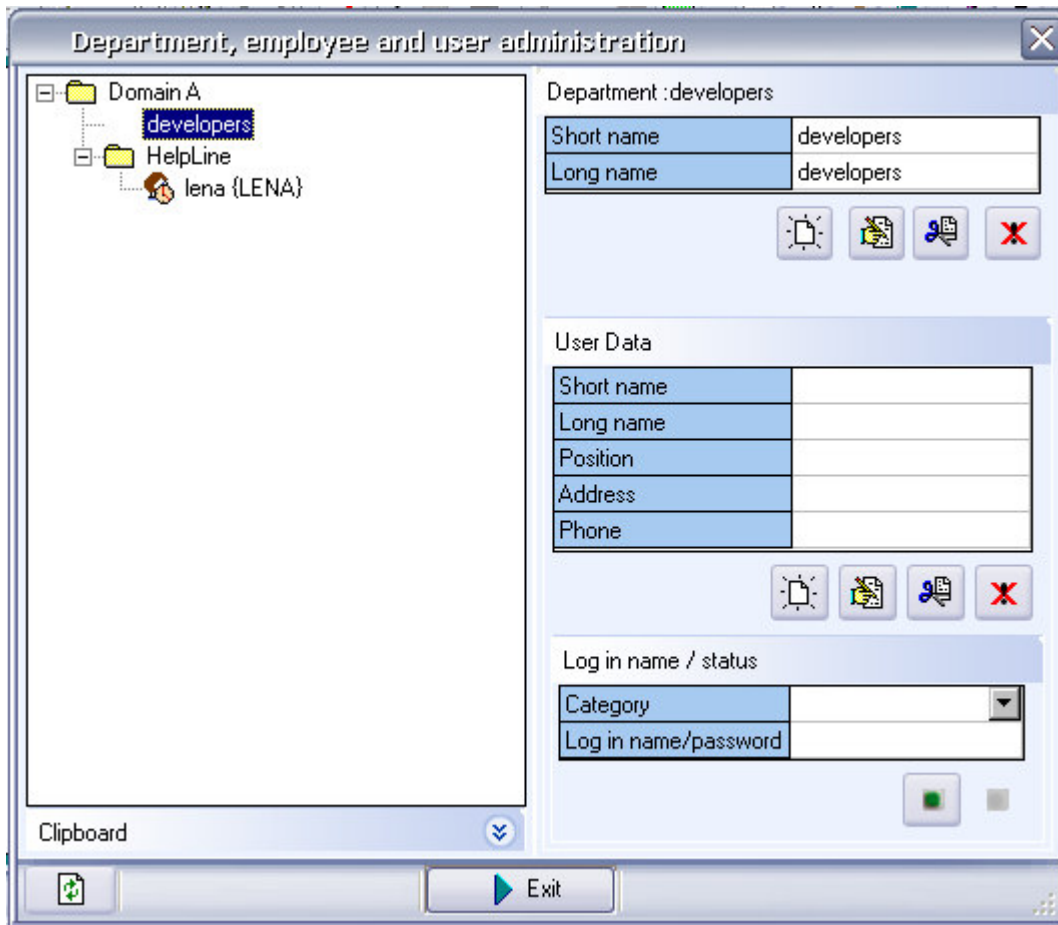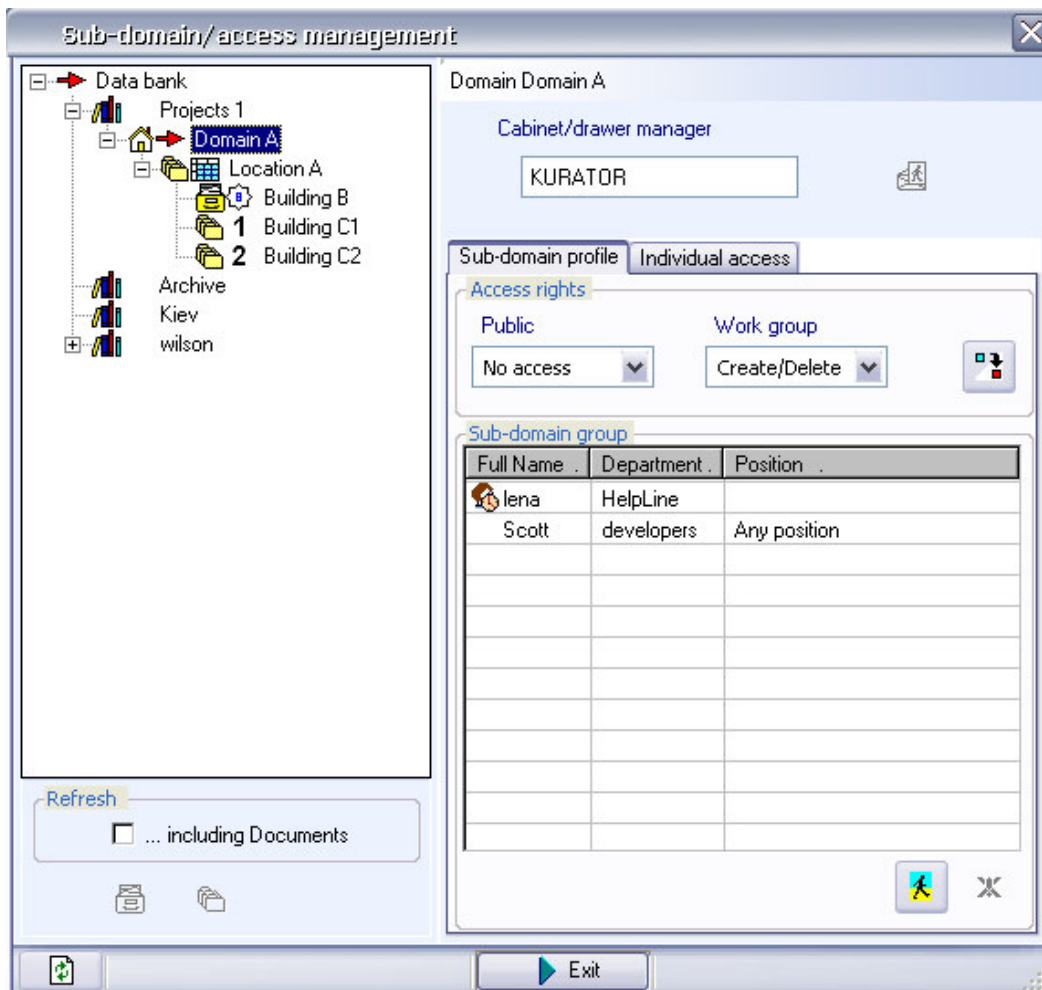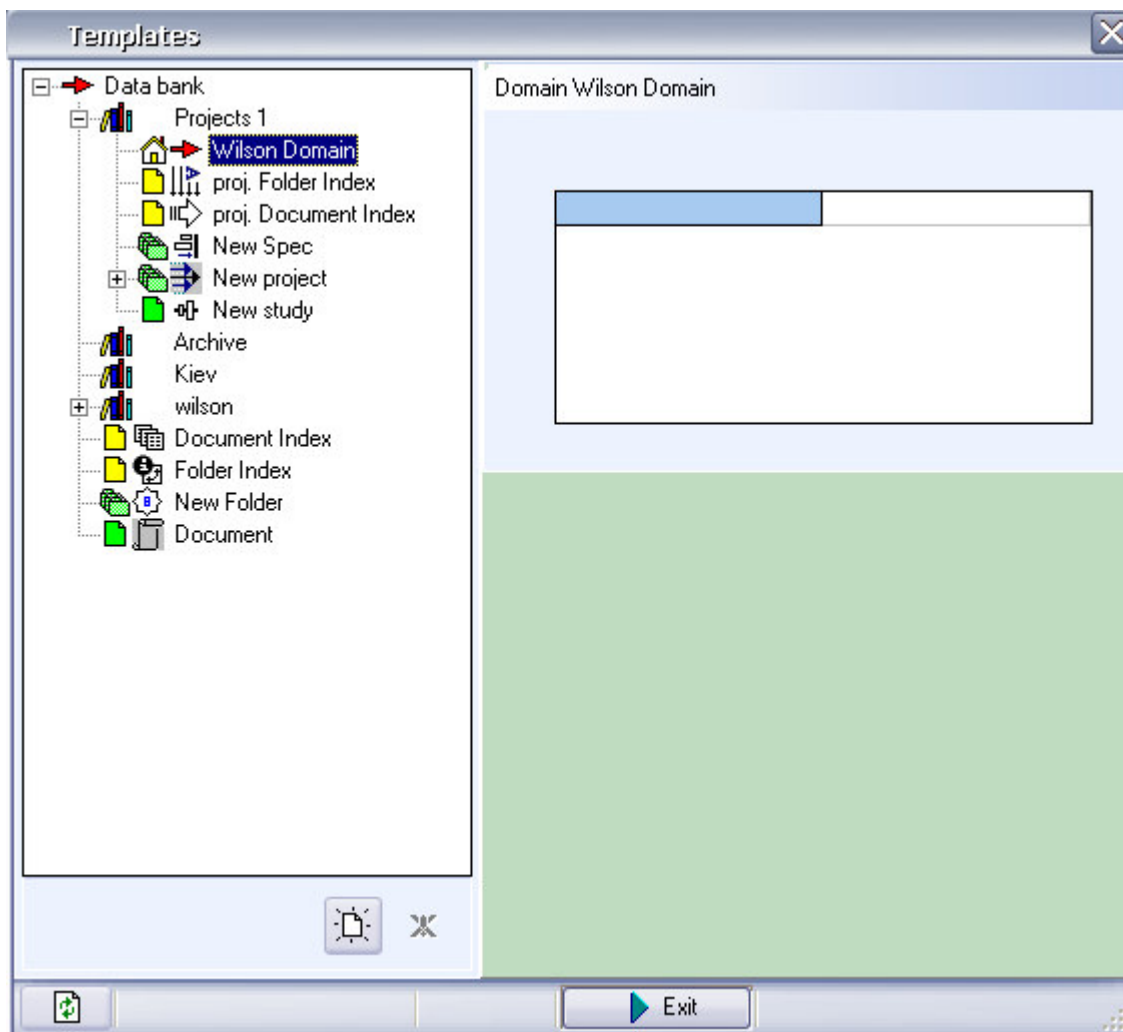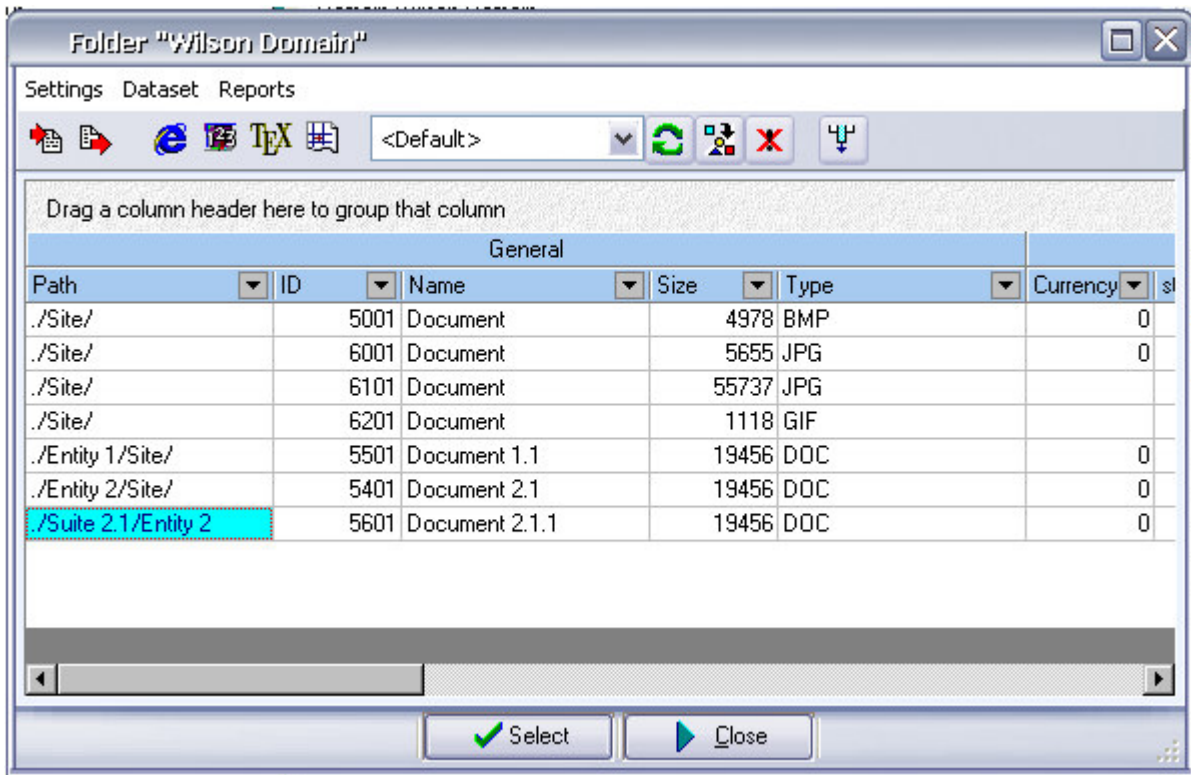
3.2.8. Removing of Folder/Document.

3.2.9. Editing Folder Properties (Attributes).

3.2.10. Editing Document Properties (Attributes) and Uploading Content.

3.2.11. Viewing the Document Content.

3.2.12. Downloading document content.

3.2.13. Editing of Document Content.

3.2.14. Versioning.

3.2.1. Connecting to / Disconnecting from Databank.
To connect:

Click button 'Connect': .

Log on window pops up:

Type in User log name, password, select Databank and click 'Connect ' button. If entered data are correct, you will see main <u>Desktop</u> window.

> Note for ORACLE based system: Contact your ASP to get valid user name, password and database requisites.
> Note for Desktop system: The only option for Database is 'Desktop Files'.

To disconnect click 'Disconnect' button .

3.2.2. Navigate Databank.
To optimize performance and reduce network traffic, ArchiDoc implements smart approach in retrieving data from database. It always downloads only those data that relevant to close neighborhood to selected folder. So some distant (from selected) nods in tree view could be displayed as not having children, while in databank they really could have. To get relevant view for questionable nod you need

To refresh Desktop view double-click folder in tree view, information regarding which should be updated.

Upon selecting folder in tree view:

Document list view will display set of documents that are in selected folder.

Attribute view will display index attached to selected folder.

Upon selecting document in document list view:

Attribute view will display index attached to selected document.

3.2.3. Reordering Folders.

To change relative order of folders inside set of sibling nod (set of nods, that have the same parent):

On folder tree view select node you want to move up or down
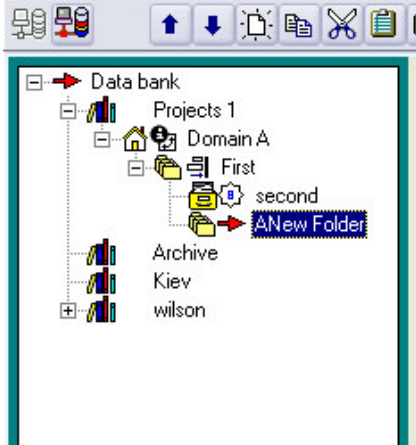
Click tool button to move folder up or to move down.
Selected nod (folder) moved.
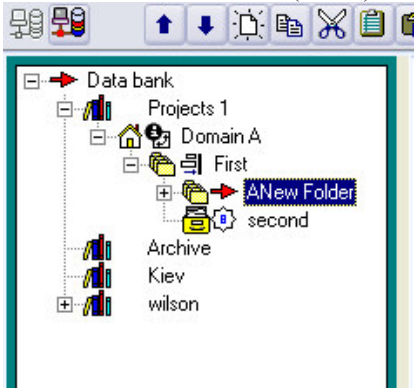
3.2.4. Reordering Documents.

To change relative order of documents inside set of sibling documents (set of documents that have the same parent folder):

On document list view select document you want to move up or down
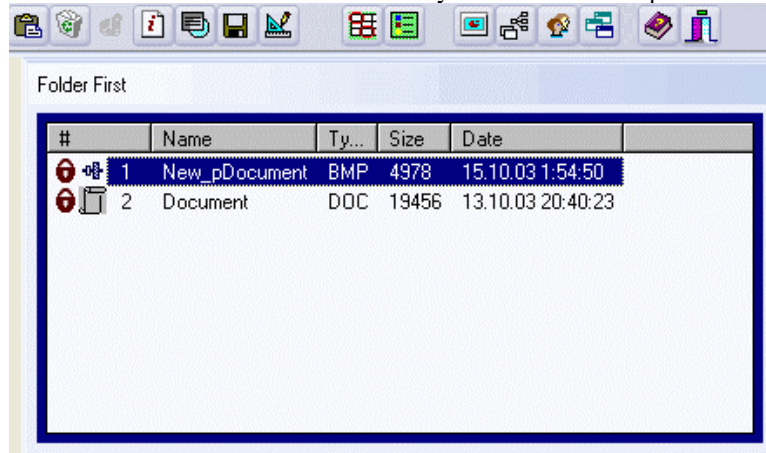
Click tool button [↑] to move folder up or [↓] to move down.
Selected document moved.
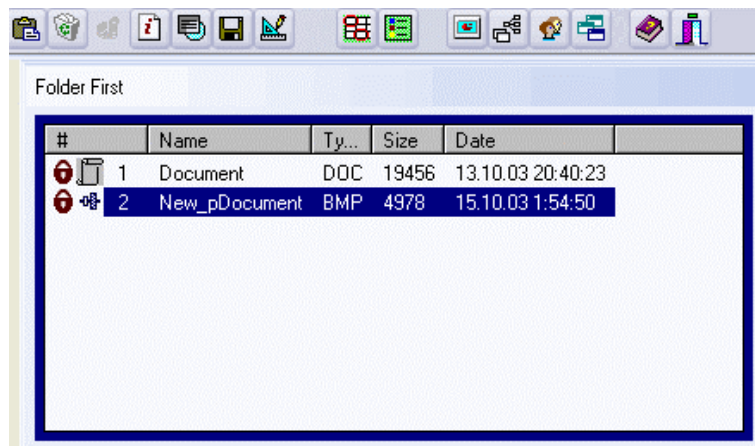
3.2.5. New Folder.
1. Select parent folder on folder tree view.
2. Click button 'New' [⬚]. Windows 'Insert new' pops up.
3. Select item 'Folder from template list' in combobox.
4. Select template from template list box
5. Click 'OK' button. New folder is highlighted
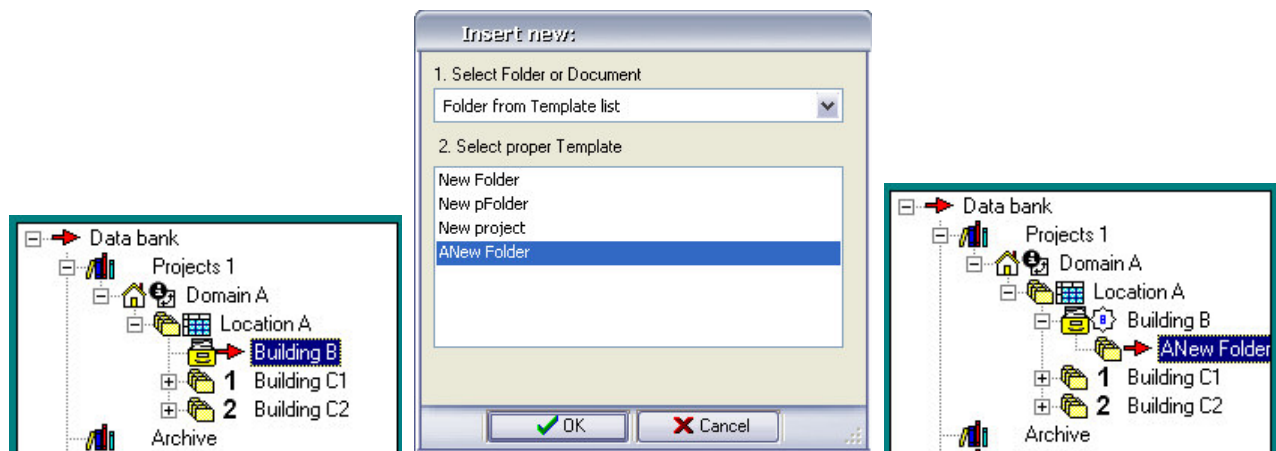
3.2.6. New Document.

      1.Select parent folder on folder tree view.

      2.Click button 'New' . Windows 'Insert new' pops up.

      3.Select item 'Document from template list' in combobox.

      4. Select template from template list box

      5. Click 'OK' button. New Document is highlighted
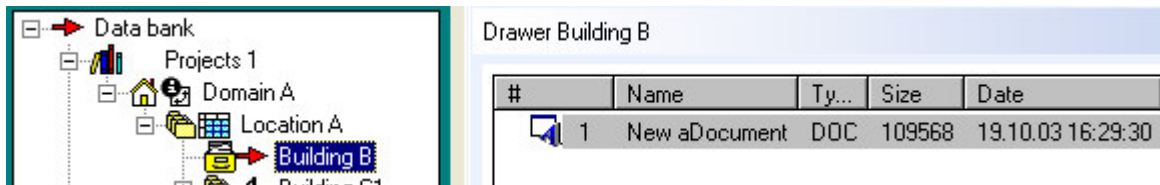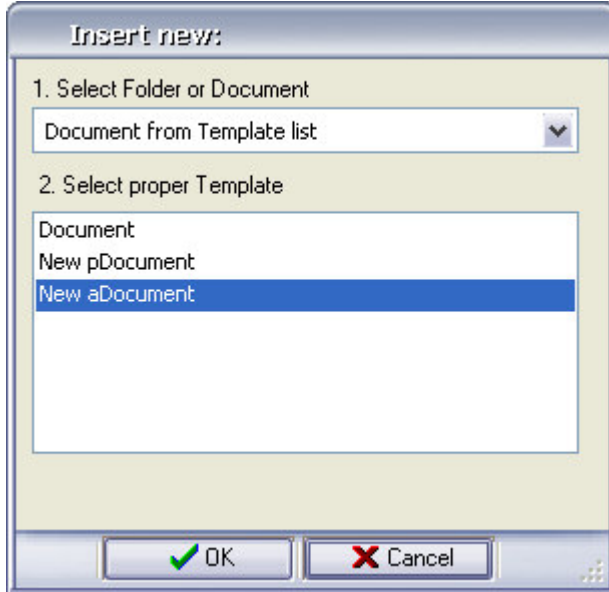
3.2.6. Copy/Cut-Paste Folder/Document

      1. Select source folder/document

      2. Click 'Copy' ('Cut') button

Clip board windows pops up:
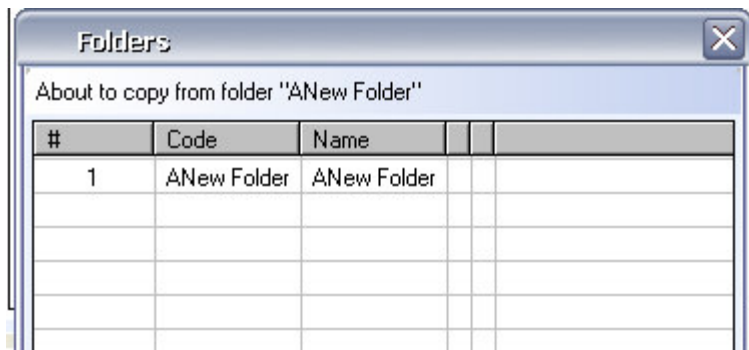
      3. Select target parent folder.

      3a. If document is coping, select any document on document list view.

      4. Click 'Paste' button.

      Relocated folder (document) is highlighted.

3.2.7. Showing (Hiding) Clip Board Window.

Click 'Show/hide clip board' button.

3.2.8. Removing of Folder/Document.
Select source folder/document

Click 'Delete' button. Warning message pops up:
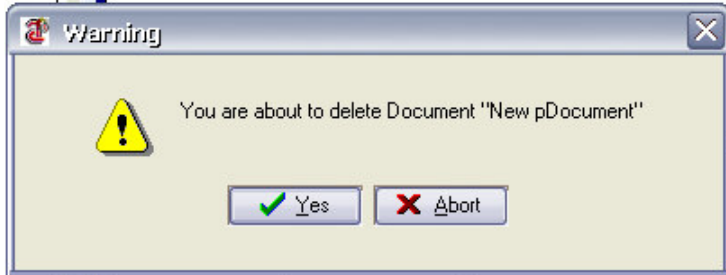
Click 'Yes' button.

3.2.9. Editing Folder Properties (Attributes).
1. Select source folder

2. Click 'Property' button. Folder attributes window pops up:
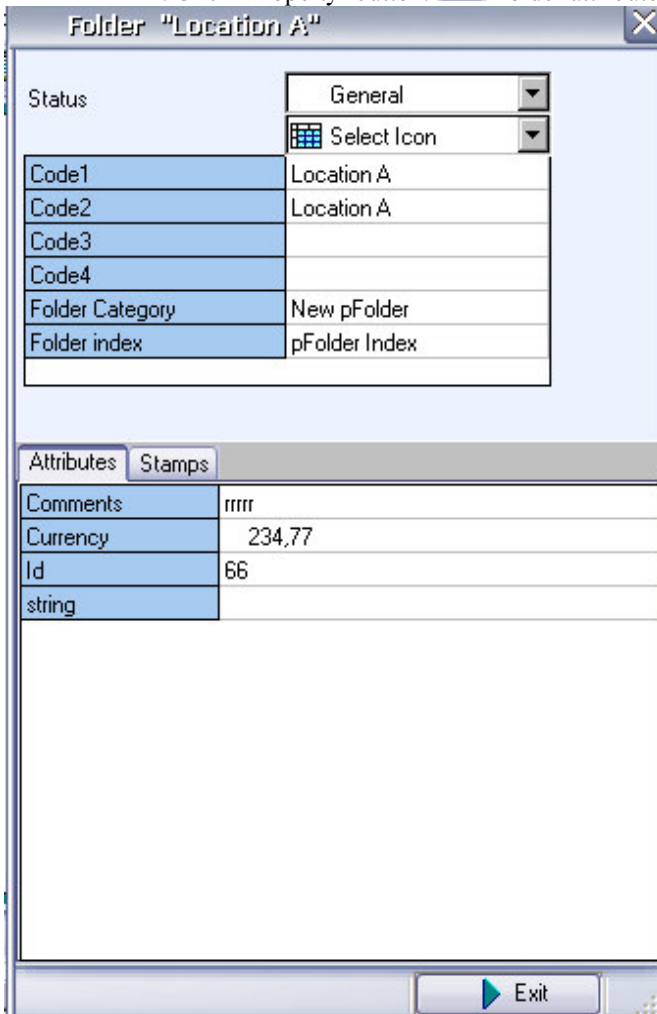
To modify folder's Status: make selection from 'Status' combobox.

To change folder's icon: select icon from 'Select icon' combobox.

To modify main descriptive strings (fields labeled as 'Code 1' - 'Code 4'): type in corresponding edits box.

- Note. String from edit box 'Code 1' will appear as Folder name in tree view.

To modify values optional descriptive attributes (table under 'Attributes' tab): type in corresponding edits box.

To close Folder attributes window click 'Exit' button.

3.2.10. Editing Document Properties (Attributes) and Uploading Content.
1. Select source document
2. Click 'Property' button. [icon] Document attributes window pops up:
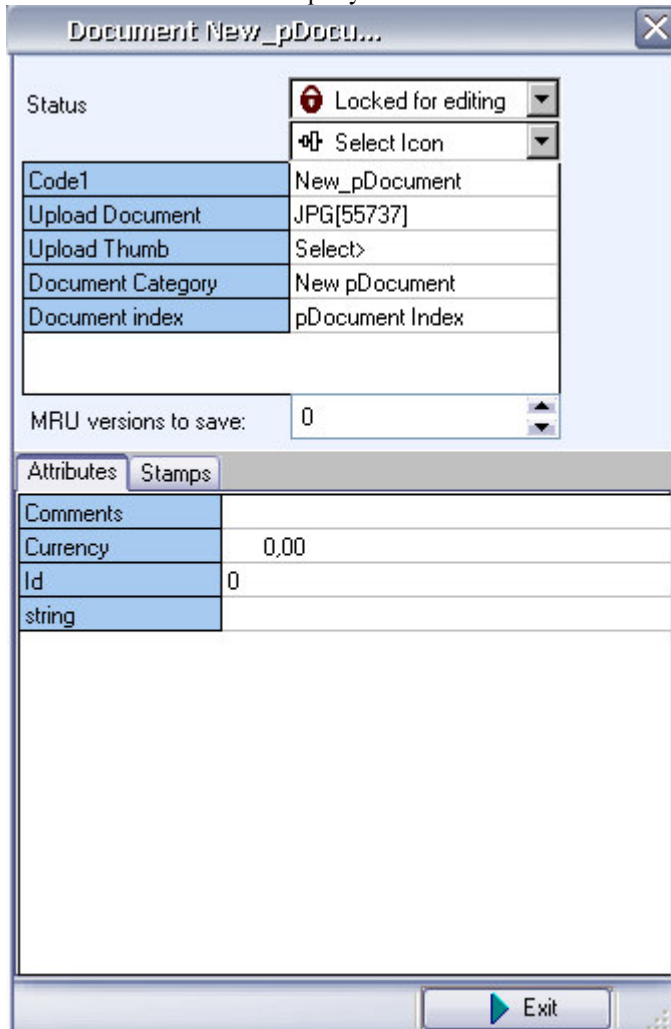
To modify document's Status: make selection from 'Status' combobox.

To change document's icon: select icon from 'Select icon' combobox.

To modify document name (field labeled as 'Code1'): type in corresponding edits box.

- Note. String from edit box 'Code 1' will appear as Document name in document list view.

To upload file as new document content:

Double click field labeled as 'Upload document'. Standard 'Open file' dialog pops up.

Click 'Open' button to start file transfer. 'Uploading..' message window pops up. Wait until transfer finished.

- Warning. Use 'Cancel' button on 'Uploading..' message windows cautiously!

To upload file as new document thumb:

- Note. If thumb is attached, it is displayed in quick view window rather then document content itself.

  Double click field labeled as 'Upload thumb'. Standard 'Open file' dialog pops up.

  Click 'Open' button to start file transfer. 'Uploading..' message window pops up. Wait until transfer finished.

- Warning. Use 'Cancel' button on 'Uploading..' message windows cautiously!

To set up versioning: enter non zero value in to 'MRU versions to save' spin edit.

- Note. List of stored MRU versions is displayed on list view under 'Versions' tab of attributes page control of desktop:
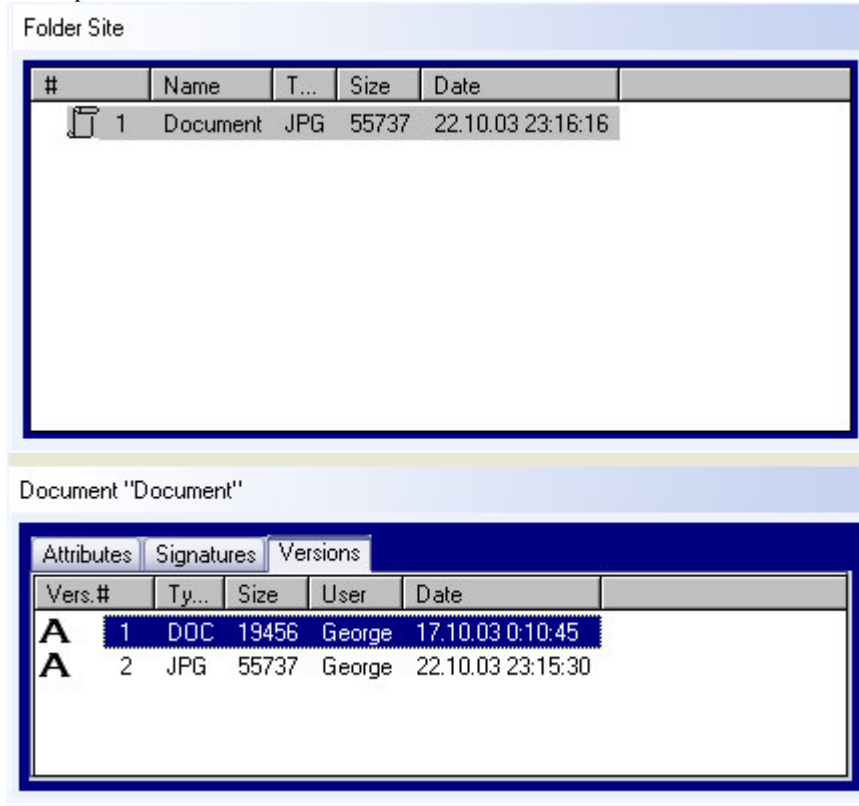
3.2.11. Viewing the Document Content.
To view content of the document:

Select source document

Click 'View document' button.

Processing of this command depends on document type and existence of attached thumb as follows.

If document has thumb or document has no thumb, but document type is supported by local viewer, quick viewer windows pops up:
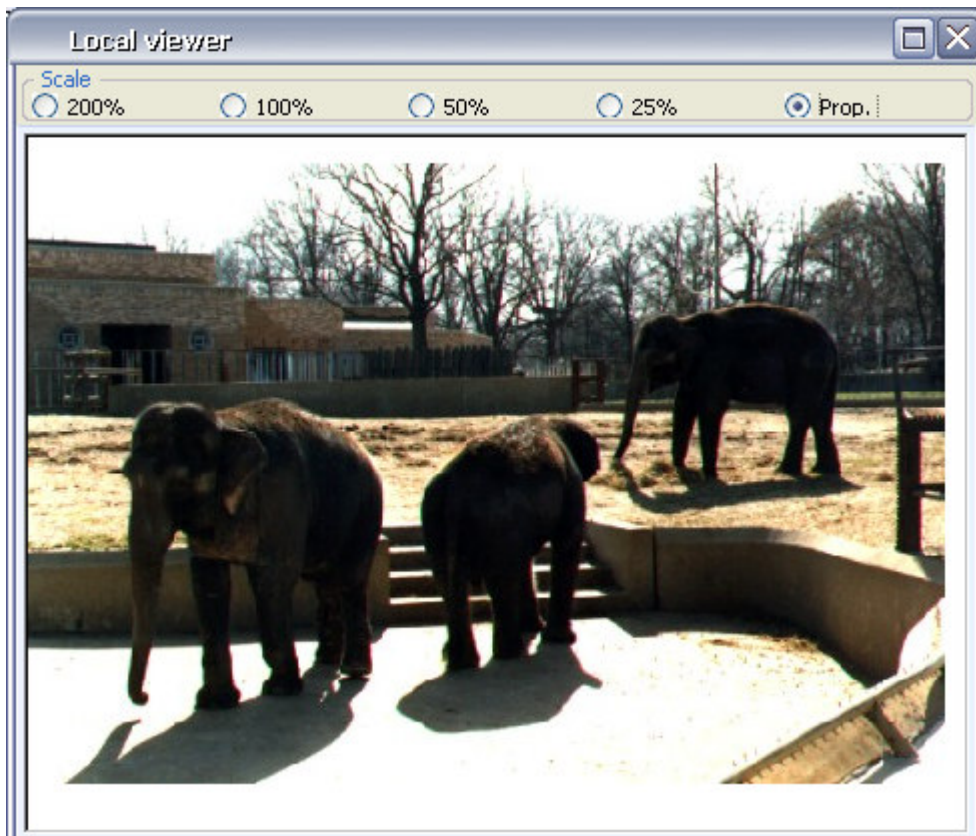
The thumb, or if document has no thumb, document content will be displayed

Otherwise, if there is (are) external application(s) registered as viewer(s) for this document type, application, registered as Default external viewer for this document type will start. Further document content processing will be accomplished by Default viewer.

Otherwise, quick viewer windows pops up and displays error massage picture:
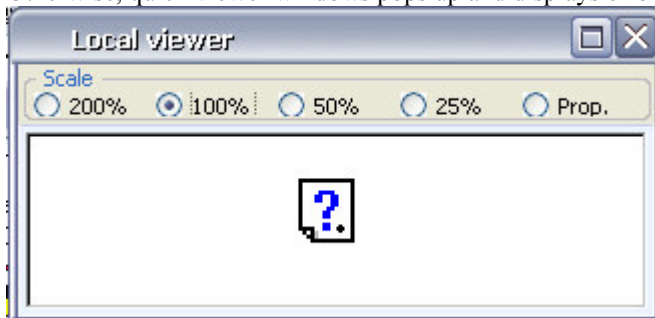
- Note. There are following document types, supported by local viewer:
  Raster images of types:
  BMP,CEL,CUT,DIB,EMF,GIF,ICB,ICO,JPEG,JPG,PBM,PCC,PCD,PCX,PGM,PIC,PPM,RLE,
  SCR,TGA,VDA,VST,WIN,WMF
  .TXT files and.RTF files

3.2.12. Downloading document content.
Select source document

Click 'Save document' button. 🖫 'Save as...' windows pops up.
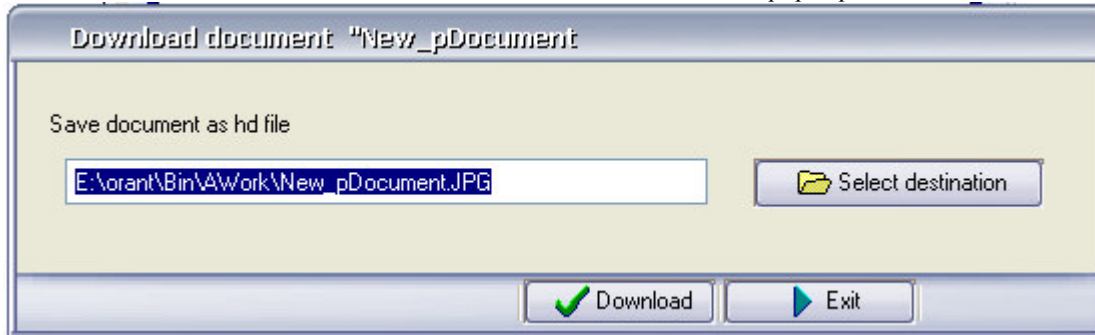
(optional). To change target location on hard drive click 'Select destination' button and follow instructions.

Click 'Download' button.

3.2.13. Editing of Document Content.
- Note. Editing is available only if there is (are) external application(s) registered as editor(s) for this document type.

Select source document

Click 'Edit document' button. 📝 'Information' windows pops up.
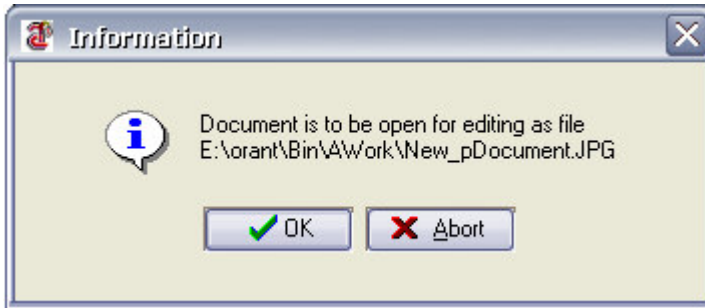
Click 'OK' button.

3.2.14. Versioning.
ArchiDoc allows users to track revised versions of a document content. Versioning is setting up by assigning non-zero value to 'MRU versions to store' spin edit on Document attributes window. This value represents maximum number of most recently uploaded versions of document content to store.

Note. List of stored MRU versions is displayed on list view under 'Versions' tab of attributes page control of desktop:
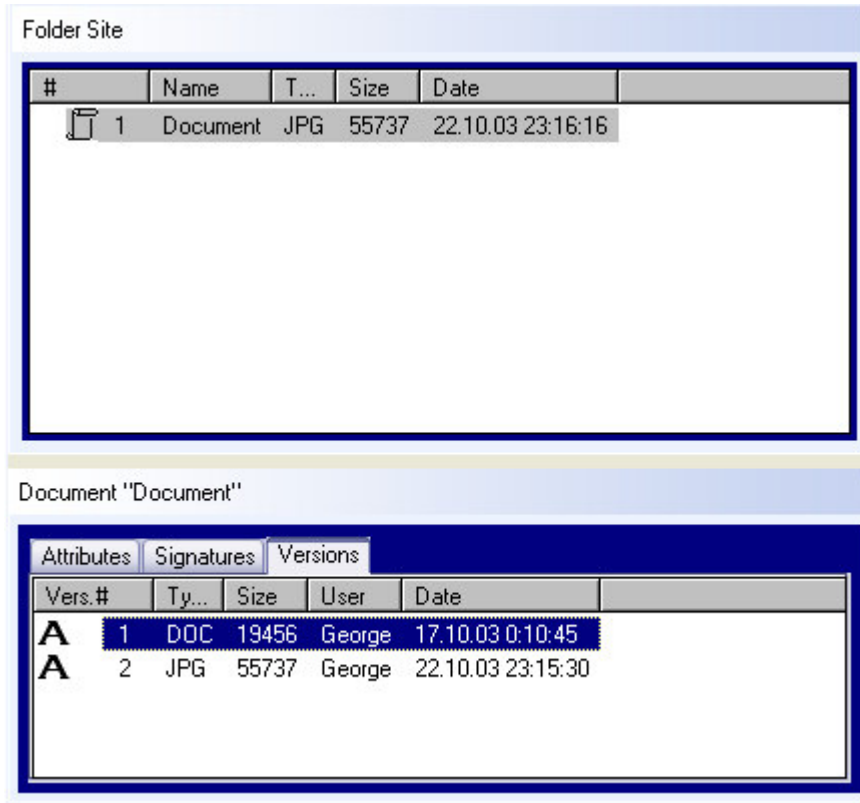
3.3. Viewers and Editors Configuration.
3.3.1. Viewers and Editors Overview.

3.3.2. Registering the Document Content Type.

3.3.3. UnRegistering the Document Content Type.

3.3.4. Registering Additional Viewer or Editor.

3.3.5. Replacing Viewer or Editor.

3.3.6. Deleting Viewer or Editor.

3.3.1. Viewers and Editors Overview.
eDocuStor is integrated into existing workstation environment by establishing association between document content types and installed appropriate third party software. You can have several viewers and/or editors associated with the same file type.

To establish such association:

> Register document content type
> Register application(s) to edit and/or view document content.
> - Note 1. P.1 is necessary only if document content type is not one of the types, supported by local (quick) viewer.
> - Note 2. Specific to each workstation viewers and editor configuration is storing in the Databank.

3.3.2. Registering the Document Content Type.
- Note. If you wish to register some file type, first check presence of such extension in 'Registered file types' list view of 'Viewers and Editors Settings' window. If it is, you do not need to register.

To register file type:

Click 'Viewers/Editors' button . 'Viewers and Editors Settings' window pops up.
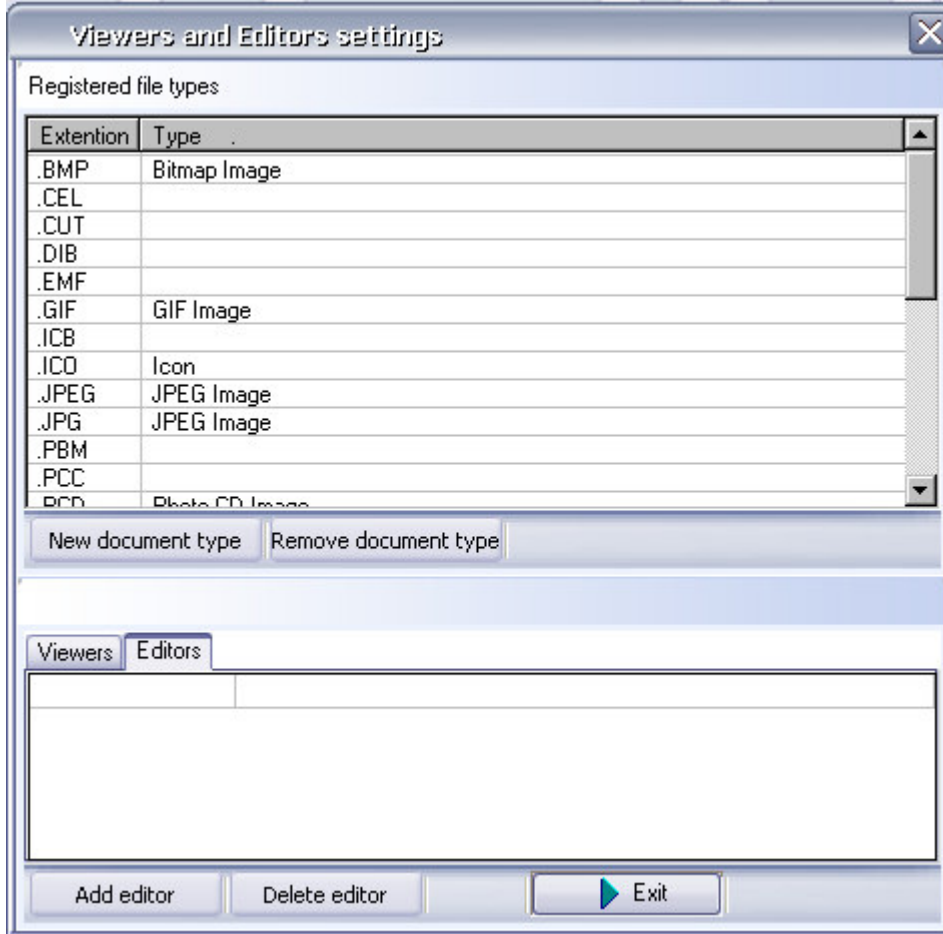
Click 'New document type' button. Standard 'Open' dialog window pops up.

Select file with needed extension (In this sample **-** .DOC) and click 'Open' button. 'Viewers and Editors Settings' windows will show:

New file type (.DOC in our case) in 'Registered file types' list view ;

If workstation has application associated with this file type, this application in the box labeled 'Client Default' under 'Viewers' tab.
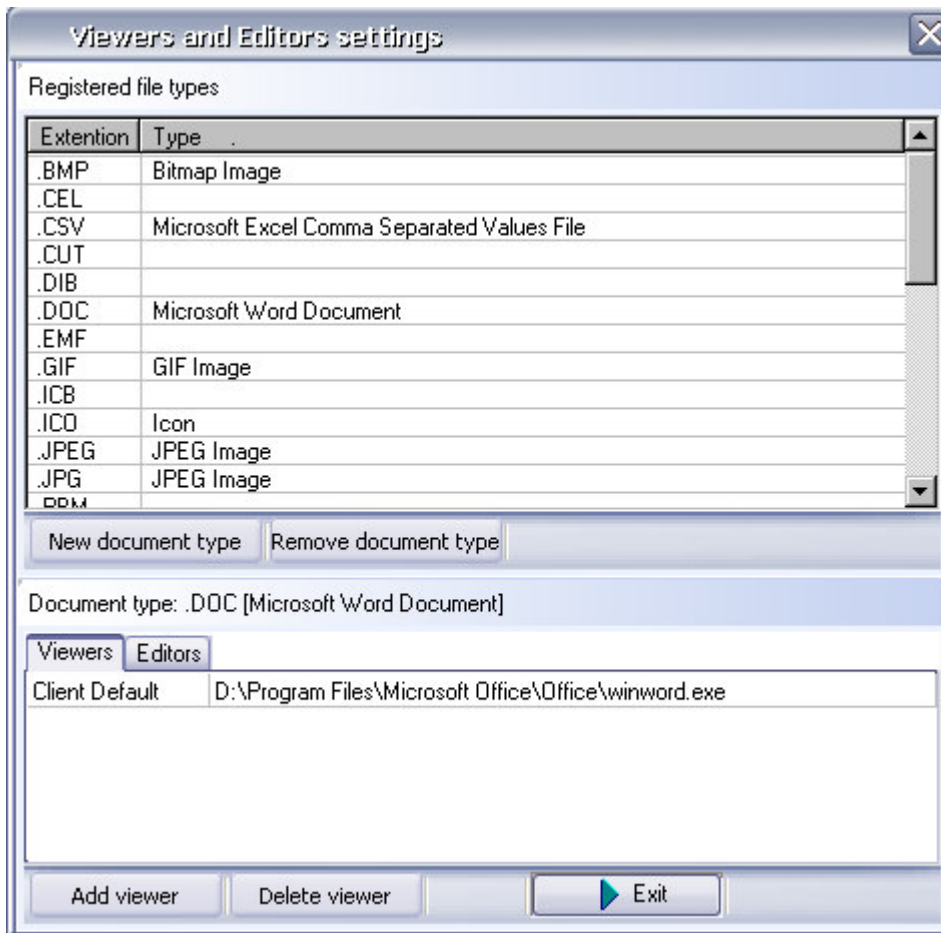
3.3.3. UnRegistering the Document Content Type.

To unregister file type, i.e. remove all associations (viewers and editor), registered for workstation:

Click 'Viewers/Editors' button [icon]. 'Viewers and Editors Settings' window pops up.

Select appropriate file type in 'Registered file types' list view ;

Click 'Remove document type button'. The system removes associations and all viewers and editors for this document type.

3.3.4. Registering Additional Viewer or Editor.

Click 'Viewers/Editors' button [icon]. 'Viewers and Editors Settings' window pops up.

Select appropriate file type in 'Registered file types' list view.

Select 'Viewers' tab to add viewer (or 'Editors' tab to add editor).

Click 'Add viewer' ('Add editor') button. Standard 'Open' windows pops up.

Navigate file system and select application for new viewer (editor). Click 'Open' button.

New row will appear under 'Viewers' ('Editors') tab. First column – name, second – path to application.

3.3.5. Replacing Viewer or Editor.

Click 'Viewers/Editors' button [icon]. 'Viewers and Editors Settings' window pops up.

Select appropriate file type in 'Registered file types' list view.

Select 'Viewers' tab to change viewer (or 'Editors' tab to change editor).

Type in first column to change display name of viewer (editor).

Double click second column to change application. Standard 'Open' windows pops up. Select new application and click 'Open' button.

3.3.6. Deleting Viewer or Editor.

Click 'Viewers/Editors' button . 'Viewers and Editors Settings' window pops up.

Select appropriate file type in 'Registered file types' list view.

Select 'Viewers' tab to delete viewer (or 'Editors' tab to delete editor).

Select row with viewer (editor) you want to delete.

Click 'Delete. Viewer' ('Delete editor') button.

- Note 1. You cannot delete default viewer.

- Note 2. Default editor may be deleted, only if there are no additional editors.

3.4. User Manager.
3.4.1. User Manager Overview.

3.4.2. Department Management.

3.4.3. Employee Management.

34.4. Database Access Management.

3.4.1. User Manager Overview.
User management implementation maintains corporate department / employees tree structure and (for authorized persons) database user access policy. To exercise this option user must have 'Domain manager' category.

3.4.2. Department Management.
To create new department

Click 'User management' button 🐵 'Department, Employee and User Management' window pops up.
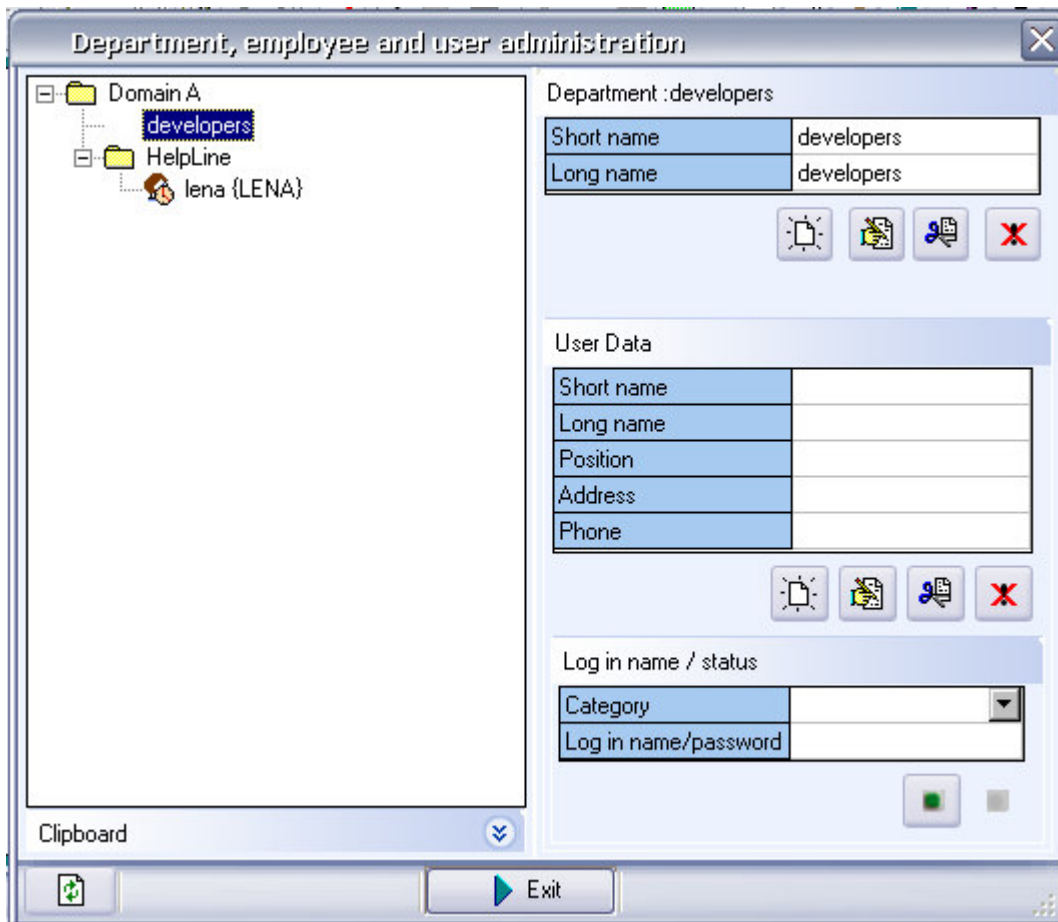
Select parent department on Department/User tree view.

Type in edit boxes labeled 'Short name' and 'Long name' under panel heading 'Department: <department short name>' department identity data.

Click 'New department' button 🔲. Created department will be displayed on tree view and 'Department' panel.
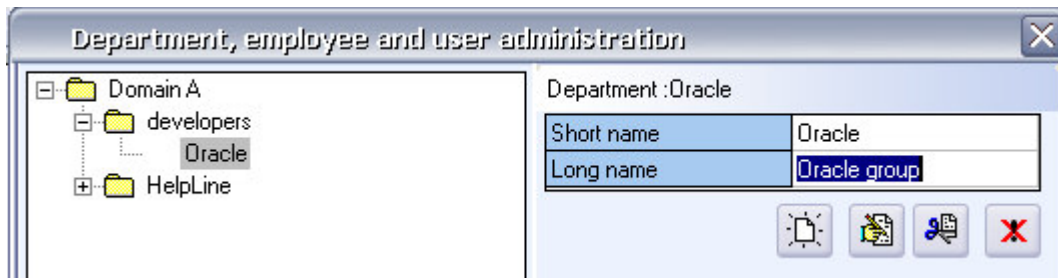
To change department short/long name:

Select department on Department/User tree view.

Type in edit boxes labeled 'Short name' and 'Long name' under panel heading 'Department: <department short name>' new department identity data.

Click 'New department' button . Updated department will be displayed on tree view and 'Department' panel.

To delete department:

Select department on Department/User tree view.

Click 'Delete department' button . Updated tree view will be displayed.

- Note. Only empty department may be deleted.

To relocate (change parent) department:

Select department on Department/User tree view.

Click 'Cut department' button . Department will be displayed in expandable panel Clipboard'.
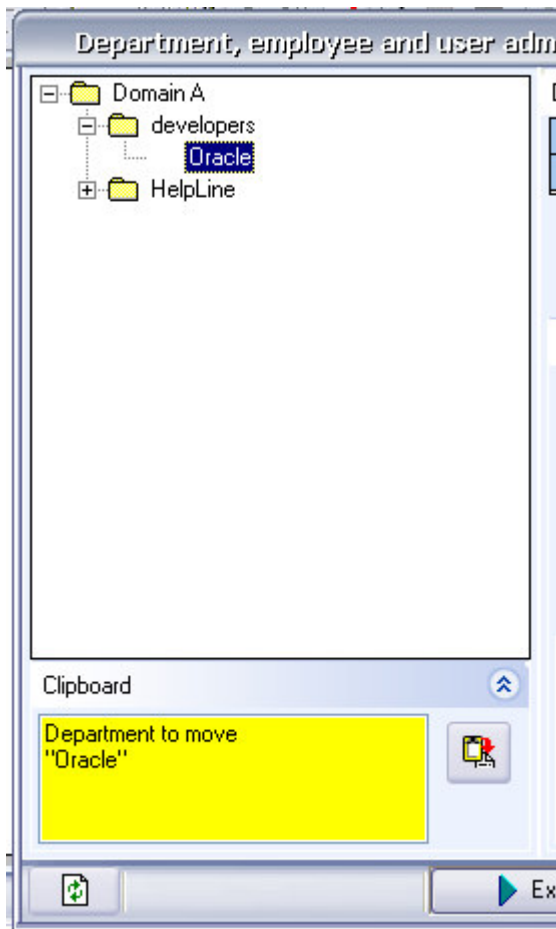
Select new parent department on Department/User tree view and click 'Paste' button. Relocated department will be displayed on tree view and 'Department' panel.
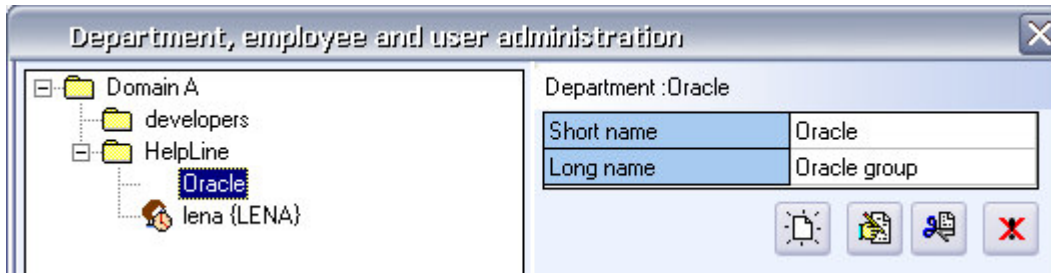
3.4.3. Employee Management.

To create new employee:

Select department on Department/User tree view.

Type in edit boxes of 'User data' panel employee profile and click 'New Employee' button [image]. New employee will appear on Department/User tree view and on 'User data' panel.
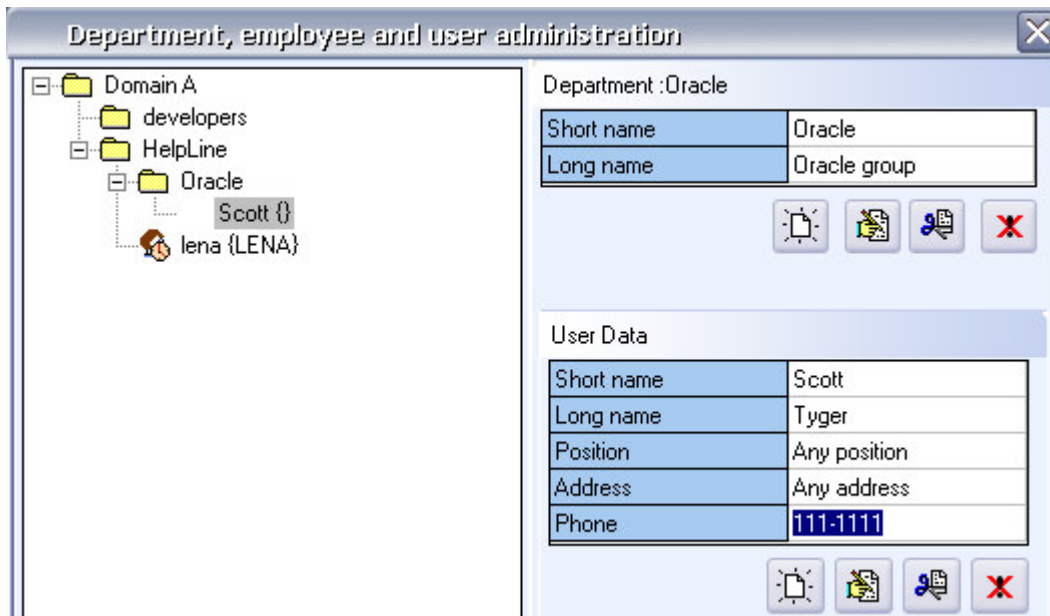
To modify employee's profile:

Select employee on Department/User tree view.

Type in edit boxes of 'User data' panel new employee profile and click 'Edit Employee' button . Updated employee data will appear on Department/User tree view and on 'User data' panel.

To delete employee:

Select employee on Department/User tree view.

- Warning. You may not delete employee with granted databank access.

Click 'Delete employee' button . Updated tree view will be displayed.

To relocate employee (change department):

Select employee on Department/User tree view.

Click 'Cut employee' button . Employee will be displayed in expandable panel Clipboard'.
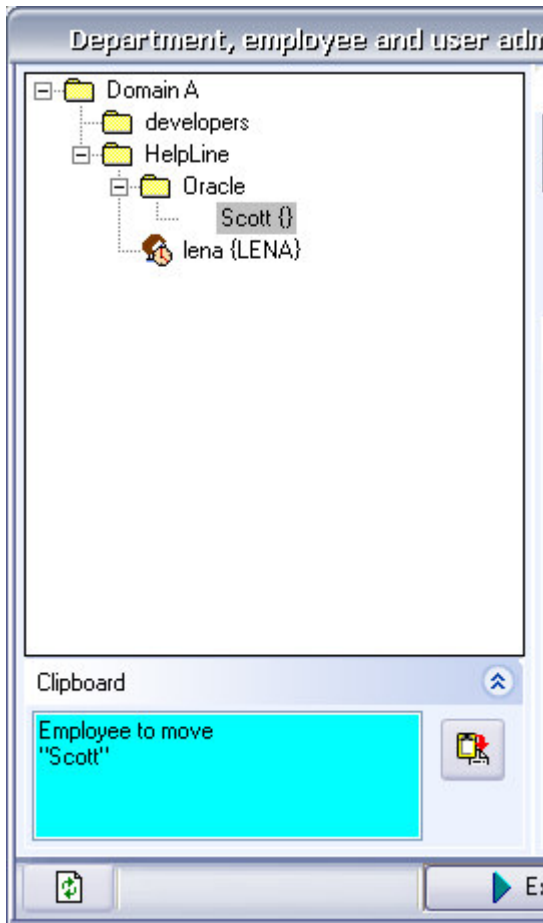
Select new department on Department/User tree view and click 'Paste' button. Relocated employee will be displayed on tree view and 'User data' panel.
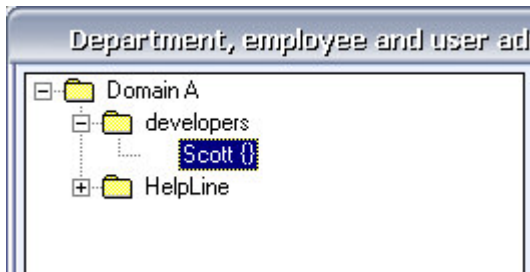
3.4.4. Database Access Management.

To grant employee access to databank:

Select employee on Department/User tree view.

Select user category in 'Category' combobox, and type user name in edit box labeled as 'Log in name/password'.

- Note 1. There are 2 categories available: 'Developer' and 'Manager'.

- Note 2. You should enter ONLY user name without password in edit box. Default password will be the same as the user name. It is strictly recommended to change default password at the first connection.

Click button 'Set up user' . Request processing begins and edit box labeled as 'Log in name/password' will have <Granting> string.

After about 1 min (time needed to process this request) click button 'Refresh' . Updated edit box labeled as 'Log in name/password' will have user name.

.

To revoke employee access to databank:

Select employee on Department/User tree view and click 'Dismiss user' button . Edit box labeled as 'Log in name/password' will contain '<Dropping>' string.

After about 1 min (time needed to process this request) click 'Refresh' button . Edit box labeled as 'Log in name/password' will be empty.

3.5. Security Management.

3.5.1. Security Management Overview.

Security management establishes desired level of rights to access certain documents, folders or folder group. These rights may be applied to individual users or user groups (Work group). Users that have 'Developer' category cannot manage security issue.

From security point of view folders may be of 2 types: (simple) Folder and Drawer. The difference between 2 types is that Drawer applies its own security policy uniformly on all its child (simple) folders and their descendants. This policy is determined by drawer's security profile. The profile includes:

1.   Drawer manager - user responsible for managing domain security profile.

2.   Work group for this drawer - list of selected domain user with special access privileges.

3.   Access rights for member of group and all other domain users

4.   Individual (for any domain user) privileges to access specific folder or document

Top level folder in domain (Domain folder) from security point of view is drawer. Its manager (Domain manager) is assigned by service provider and may not be changed from client side.

- Note. The sphere of validity of the drawer security profile covers drawer itself and drawer's simple descendant folder but has NO effect on descendant drawers (if any). The lasts imply their own security policy on their descendants. So to figure out what security profile affected certain folder you should go to closest ascending drawer.

Security management is accomplished through 'Access management' window.

Click 'Access management' button 'Access Management' window pops up.

3.5.2. Upgrading Folder to Drawer Status.

- Note. This action available ONLY for user, assigned as drawer manager for closest to folder ascending drawer.

To upgrade folder :

Select folder on folder/document tree view.

Click 'Upgrade to drawer button' . Result will be displayed

- Note. By default drawer manager for new drawer is drawer manager of closest ascending drawer. Actually the user, who created drawer.

3.5.3. Downgrading Drawer to Folder Status.

- Note. This action available ONLY for the user, assigned as drawer manager for closest to drawer ascending drawer.

To upgrade folder :

Select drawer on folder/document tree view.
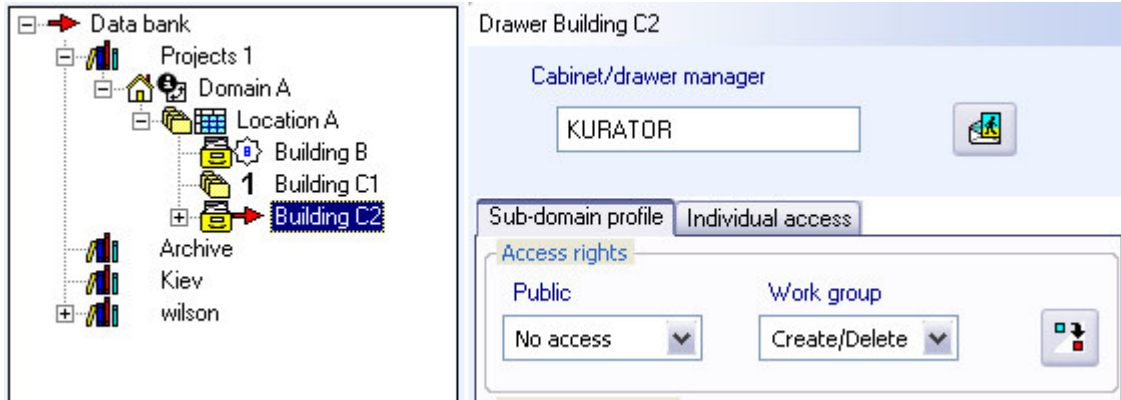
Click 'Upgrade to drawer button' . Result will be displayed

3.5.4. Replacing Drawer Manager.

- Note. This action available ONLY for the user, assigned as drawer manager for closest to drawer ascending drawer.

Select drawer on folder/document tree view.

ADrawer Click 'Select new manager' button . 'Drawer manager' windows pops up.
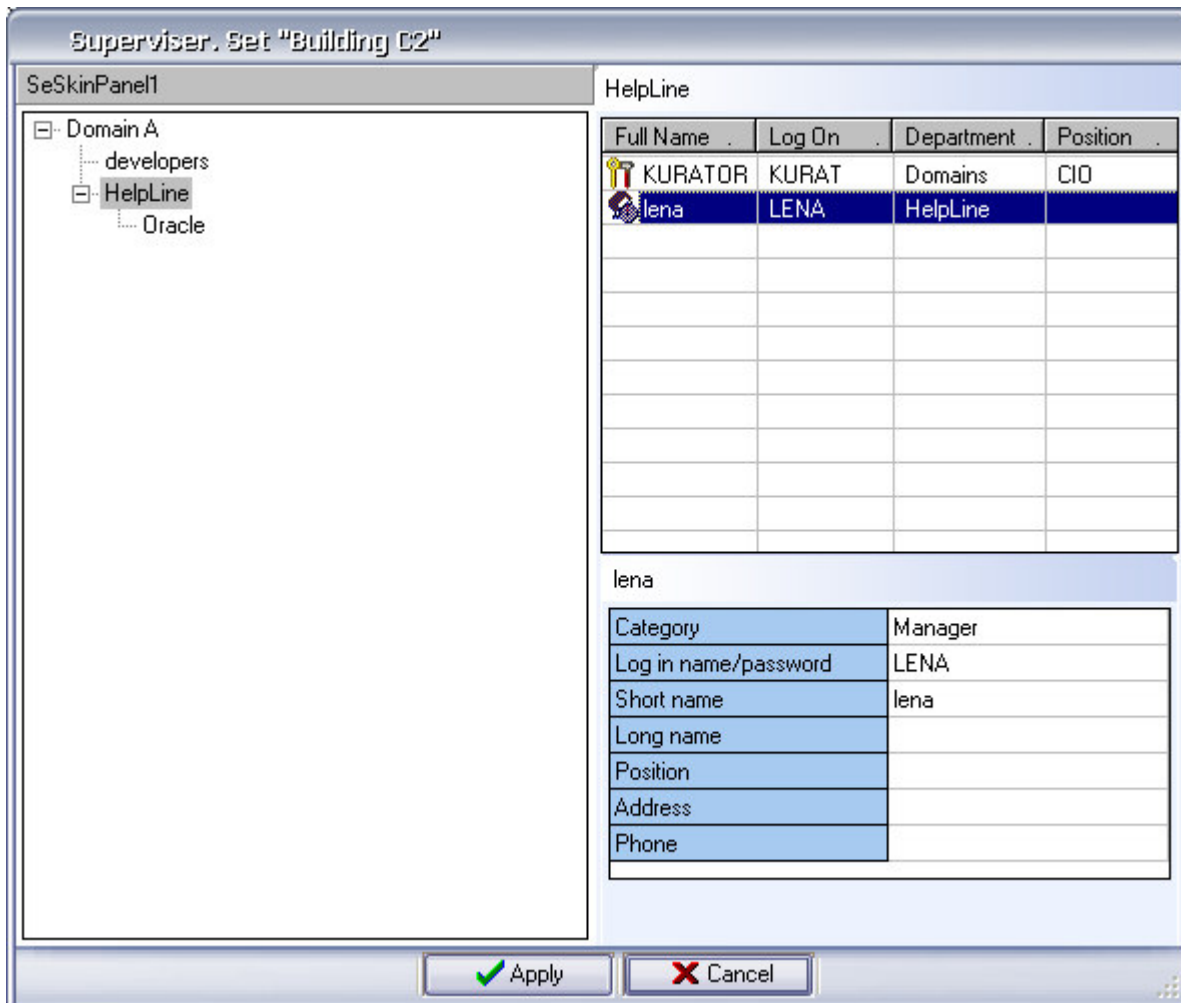
Navigate on department tree view to reach needed department, then select user in user list view and click 'Apply' button. 'Access Management' window will reflect changes.

Note. User with 'Developer' category may not be assigned as drawer manager.

3.5.5. Modification of the Drawer Access Policy.
- Note. This action available ONLY for the drawer manager.

Select drawer on folder/document tree view.
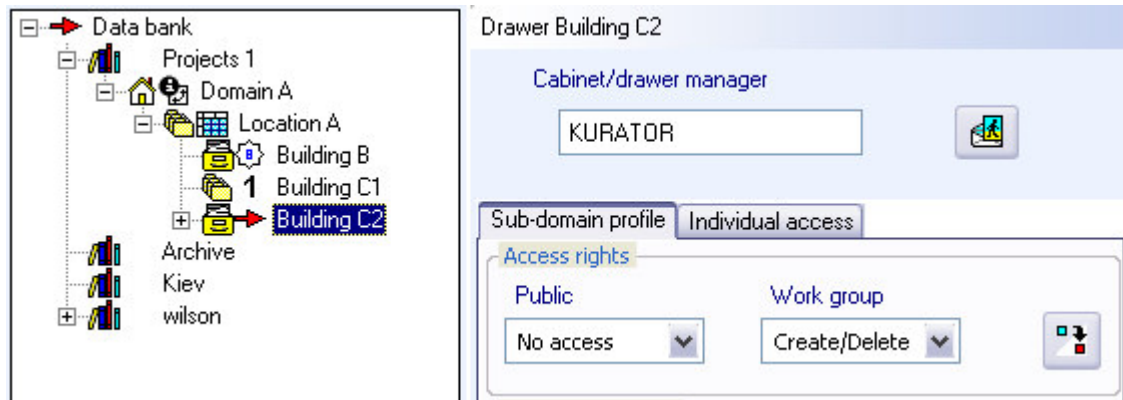
Select desired type of access for work group members (combobox 'Work group') and/or for other domain users

(combobox 'Public'). Then Click button 'Register new public/group access settings' . 'Access Management' window will reflect changes.

3.5.6. Assigning User to Work Group.
- Note. This action available ONLY for the drawer manager.

Select drawer on folder/document tree view. Click 'New work group member' button [icon]. 'New group member' windows pops up.

Navigate on department tree view to reach needed department, then select user(s) in user list view and click 'Apply' button. 'Access Management' window will reflect changes.

3.5.7. Removing User(s) from Work Group.
- Note. This action available ONLY for the drawer manager.

Select drawer on folder/document tree view, Select user(s) in group users list view under 'Domain/drawer profile' tab and click 'Remove group member' button [icon]. 'Access Management' window will reflect changes.

3.5.8. Assigning Personal Access Rights to Folder/Document.
- Note. This action available ONLY for the drawer manager.

Select folder/document on tree view you want assign personal access rights to.

- Tip. While wishing to select document make sure '… including Documents' check box in 'Refresh' frame is checked. If necessary, click 'Refresh' button [icon] to update view.

Click 'Individual access' tab to bring individual access controls to front.

Click 'set up personal access rights for…' button [icon]. 'New personal access' windows pops up.

Navigate on department tree view to reach needed department, then select user(s) in user list view and click 'Apply' button.

'Access Management' window will reflect changes.

Select desired type of access for work group members in the combobox and click button 'Register new individual access settings' [icon]. 'Access Management' window will reflect changes.

3.5.9. Revoking Personal Access Rights from User.

- Note. This action available ONLY for the drawer manager.

Select on tree view folder/document you want revoke personal access rights from.

- Tip. While wishing to select document make sure '… including Documents' check box in 'Refresh' frame is checked. If necessary, click 'Refresh' button to update view.

Click 'Individual access' tab to bring individual access controls to front.

Select user(s) in users list view under 'Individual access' tab and click Revoke personal access rights' button . 'Access Management' window will reflect changes.

3.6. Template Management.

Folder and document templates serve to populate Databank. The only way to create new object (folder or document) is to copy template and pastes it in proper place. Actually, template is prototype and its structure replicate structure of real object (folder or document).

Ideologically ArchiDoc document structure is based on existing hierarchical file systems. Each object (folder or document) uniquely determined by its location on Databank tree and by its index -set of attribute (partially inherited from file system, partially original). Index consists of mandatory and optional attributes.

Mandatory attributes, for example, includes folder (document) name, versioning, status (locked, archive, editable), size and type (doc, pdf, xls,…) of document content.

Optional attribute includes descriptive and signatures parts. Descriptive part represents set of document specific data of different types: string, integer, currency, date, time. Signature part contains personalized information (such as, 'Developed by…', 'Approved by…') and is subject for authorization and checking by ArchiDoc system.

While mandatory parameters is firmly predetermined, optional is very flexible. Such flexibility allows customizing system to perfectly fit any business nature.

Indexes are independent entities of Databank and should be having built before templates can use them.

ArchiDoc implements hierarchical approach to business customization. Top (Databank) level includes generic templates and indexes all database. Second (library) level is industry specific and include indexes and templates that are valid and visible throughout particular library. Further customization takes place on third (domain cabinet) level. Indexes and templates of this level are valid and visible only inside domain cabinet and encompass business practice of certain customer - domain owner.

Management of first 2 groups takes place on server side. Domain users can see and use them, but may not modify. Cabinet indexes and templates are under full control of Domain manager.

Note. Cabinet index and template management available ONLY for the domain manager.

Cabinet Index and template management is accomplished through 'Template management' window and discribed in p. 2.5.

3.7. Search and Presentation.

3.7.1. Search and Presentation Overview.

Main desktop window gives you general access to and view of all documents in databank domain. To get selective view, you use 'Search and presentation' tool. To activate this tool:

Select folder in desktop tree view and click 'Search and presentation' button . 'Search and presentation' window pops up.
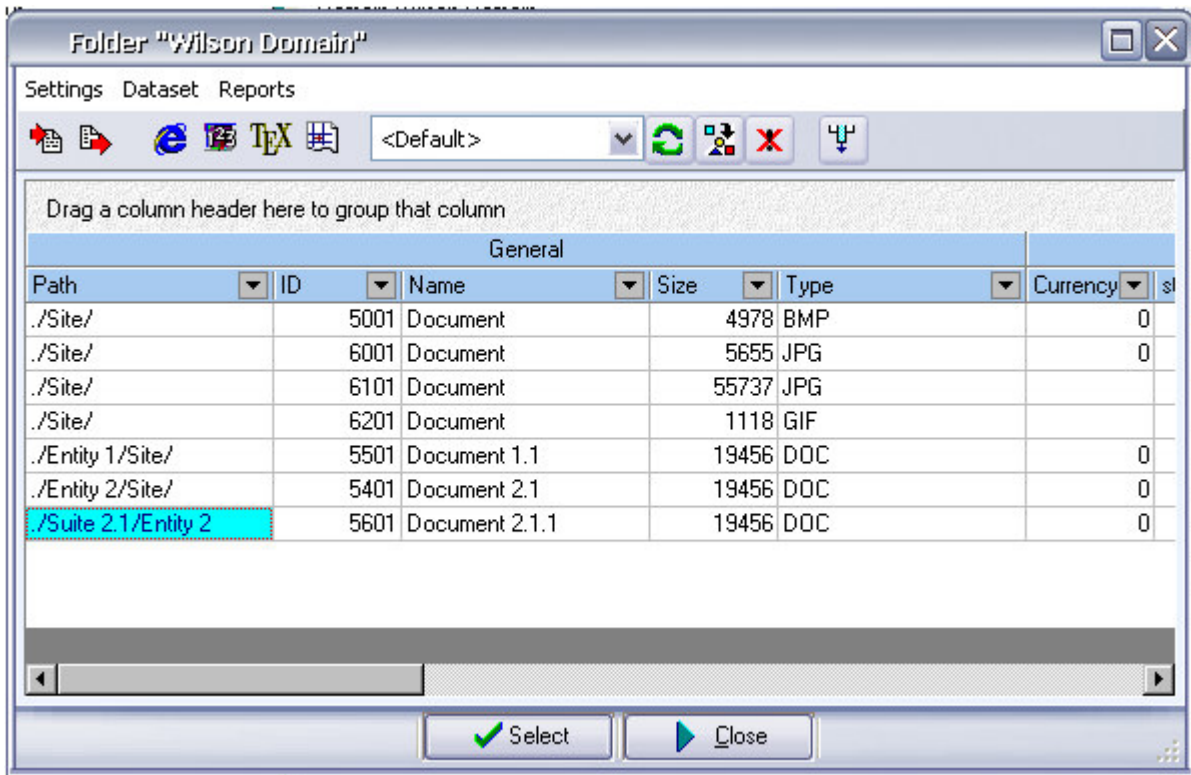
Grid in this window displays ordered list of documents from selected folder and all its child folders.

- Warning. Depending on quantity of documents in selected folder it may takes some time to load window. So be patient!

Grid has 3 bands do display documents' attributes.

1. Band 'General' contains the same fields as the document list view in desktop window as well as path (relative to selected folder).

2. Band 'Attributes' contains set of columns representing all possible optional descriptive attributes. Some fields in these columns may be empty. They correspond to attributes that are not included into index that is attached to document.

3. Band 'Signatures' contains optional signature attribute set.

- Note. Index may contain up to 2 signatures.

3.7.2. Hiding and Showing Columns.

Click 'Show column set' button ⊌. Column management window appears
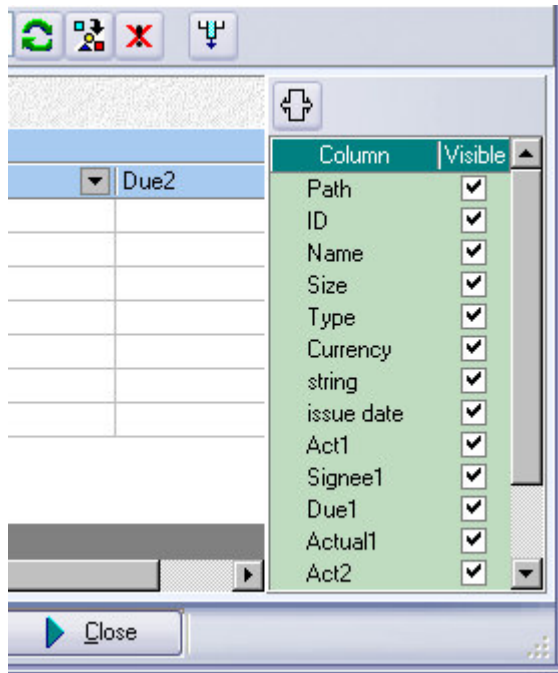
Check (uncheck) boxes to have particular field visible (hidden).

Click 'Show column set' button once more to hide column management window.

- Note. Another way to hide column is to drag column header into data area of the grid and drop it.

3.7.3. Column Width Adjustment.

Click 'Show column set' button ⊌. Column management window appears

Click 'Column autosize: On/Off' button ⊕. The column size will be adjusted to fit visible grid width.

Click 'Column autosize: On/Off' button once more to return to previous settings.

Click 'Show column set' button once more to hide column management window.

3.7.4. Sorting.

Sorting is performed automatically by clicking on a column title. You can sort the list in either ascending or descending order.

To sort documents in grid list:

Click the left mouse button on the column title; the database will sort on that column.

One click and the column will sort in ascending order.

Click again and it will sort in descending order.

To sort by multiple columns hold down the Shift key to select multiple columns in a sort.

3.7.5. Grouping.

One of the most powerful option is the ability to group data within the grid by any column.

A group is a set of documents that has common data in a field - such as invoices from the same vendor or contracts due on the same date. Group documents to see related items together, similar to an outline. You can expand or collapse the group headings to display or hide the documents they contain.
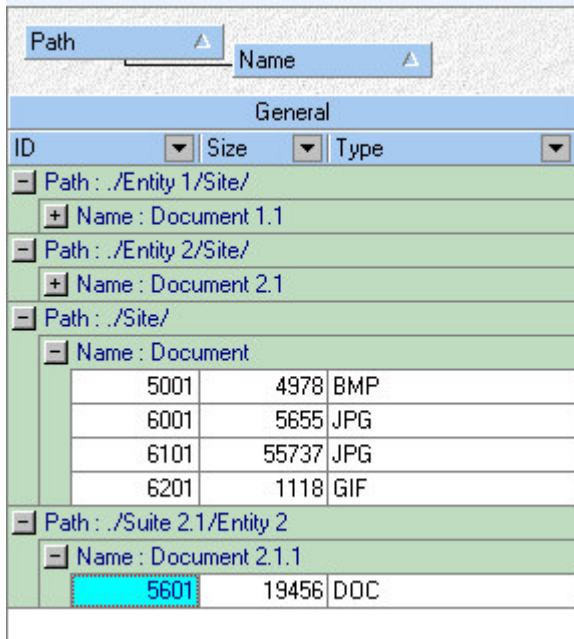
To Group documents
From the Column Header Bar drag and drop a field to be the first level of the grouping

Add additional fields as sub-groups

* Note. Groupings can be changed by dragging the field into a new position on the Group By Panel.

To expand grouped documents:
Click on the plus sign next to that group

To change grouping hierarchy in a Folder:
Drag and drop the group to move higher on in the hierarchy to the top of the list in the Group Panel

3.7.6. Multiple Lines.
Grid has a unique feature – the ability to place columns onto several lines so that users can view a great number of columns without using the horizontal grid scrollbar.

To make multilane view:
Expand height of column title bar by dragging its bottom edge down.

Drag column names and drop them at desired position:

3.7.7. Incremental Search.

Grid provides an incremental search facility in grid cells.

Incremental search works in the following manner:

Types text within a cell. The Grid searches for the text in records during entry. If the search yields results, the Grid moves selection to a those record. Otherwise, the selected node does not change.

To continue searching, press Ctrl-Enter (moves forward) or Shift-Enter (moves backward).

- Note. The Grid searches for text entered within a focused column only.

3.7.8. Filtering.

MS Excel® style filtering is available within the Grid. Filtering is a quick way to find a subset of data within a displayed set of records. To activate the filtering capabilities use arrows that are drawn to the right of column captions.

To initiate a filter:
Click the appropriate arrow. List of option appears:

To avoid filtering: select '(All)'.

To filter record with particular value: select one of the values below first two options.

To uses extended search: select '(Custom)'.

In last case 'Custom AutoFilter' window pops up:
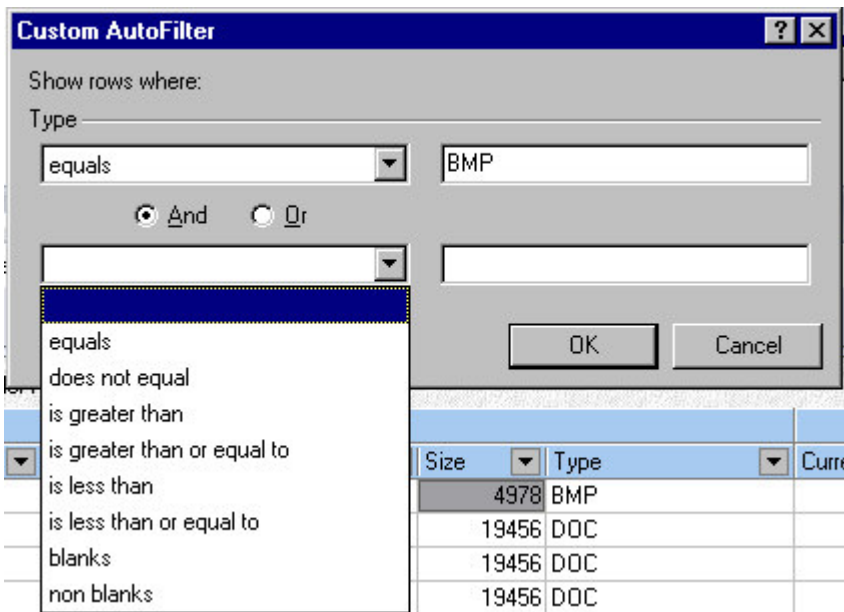
- Note. The Custom AutoFilter window allows you to determine two conditions for a column.

Upon competing, Grid displays records according to implied filter:
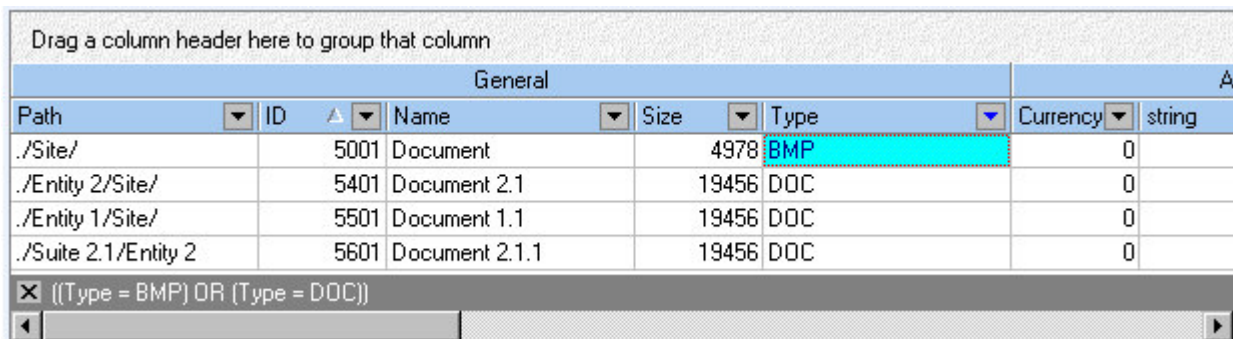
- Note 1. Filtering conditions are displayed in the bottom of Grid. .

- Note 2. Grid support multicolumn filtering. To use this option Consequently apply filter to needed columns.

To deactivate a filter:

Click button 'Clear Filter' ⊠.

3.7.8. Working with Layouts.

With the Grid, you can create and register several grid layouts and use them upon necessity. Layout registration is workstation specific.

To create new layout:

Set up column and filter configuration you want to register.

Type in 'Select grid layout' combonbox new name of layout.

Click 'Save layout as' button . New layout will be registered.

To activate existing layout:

Select needed layout by name in 'Select grid layout' combobox.

Click 'Refresh' button . Grid will be repainted.

To modify existing layout:

Select needed layout by name in 'Select grid layout' combonbox.

Re-Set up column and filter configuration.

Click 'Save layout as' button ![icon] . Registered layout will be updated.

To delete existing layout:
Select layout by name in 'Select grid layout' combonbox.

Click 'Save layout as' button ![icon] . Registered layout will be deleted.

- Note. You may not delete '<Default>' layout.

3.7.9. Presentation and Reporting.
Grid contains powerful presentation functions that allow you to save selected records directly to TXT, XML, HTML, and Microsoft Excel® files.

To save data:

- In TXT format- click 'Save as HTML page' button ![icon] ,

- In Microsoft Excel® format- click 'Save as Excel file' button ![icon] ,

- In HTML format- click 'Save as text file' button ![icon] ,

- In XML format- click 'Save as XML file' button ![icon] ,
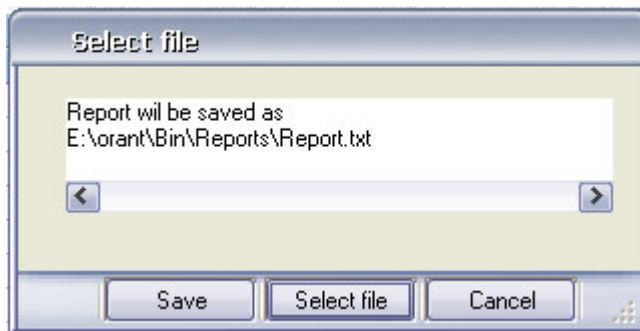
'Select file' window pops up

Click 'Save' button, or if you wish to change destination, preliminarily select another file name and/or path by clicking 'Select file' and following instructions. The report will be saved in selected format.

3.7.10. Export and Import.
Grid allows to export data in binary files and import previously exported data.

To export data:
Click 'Save dataset' button ![icon] .

'Select file' window pops up

Click 'Save' button, or if you wish to change destination, preliminarily select another file name and/or path by clicking 'Select file' and following instructions. The dataset will be saved in binary format.

To import data:
Click 'Save dataset' button ![icon] . Standard 'Open file' dialog pops up.

Select previously exported file and click 'Open'. Grid will display imported dataset.

3.7.11. Closing 'Search and presentation' Window.
To close window and jump to document, selected in the Grid, click 'Select' button.

To close window without changing desctop view, click 'Close' button.

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