

# ES CONTENT MANAGEMENT - EVER TEAM

## USER GUIDE

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## 1. ES-DMS OVERVIEW

EverSuite Document Management Services Standard Edition (ES-DMS SE) is a plug & play solution installed on top of Windows SharePoint Services.

ES-DMS SE installation is run from a single executable setup file. It is installed as a feature in the WSS or MOSS site.

ES-DMS SE can be accessed from the Home site or any of its sub sites.

## 2. STEP-BY-STEP GUIDE

This document serves as a guide using a learn-by-example method involving step-by-step tutoring of all the functionalities available throughout the application.

### 2.1 LOGIN TO SHAREPOINT

#### 2.1.1 USER PROFILE

A User Profile is personal settings and information about a user that has login access to ES-DMS SE application.

The User Profile contains user related sections like tasks, calendar, settings... A user can customize, operate and personalize his sections according to his needs.

A User accesses different sections and operations in the solution depending on his role and access rights.

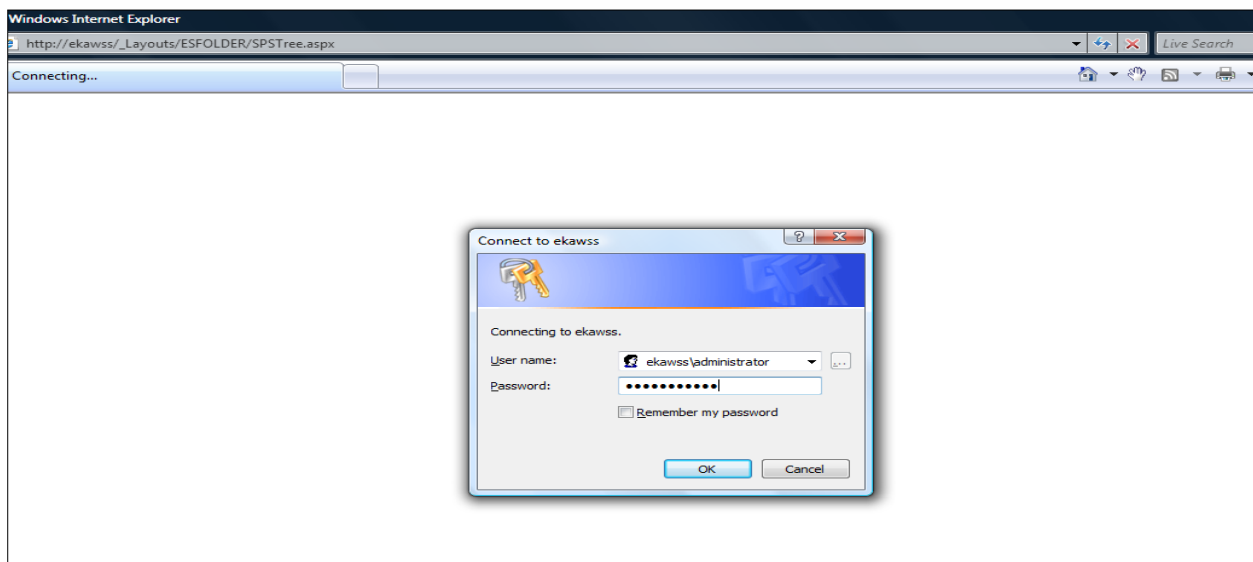
Users access ES-DMS SE using a Web browser, such as Microsoft® Internet Explorer, Netscape Navigator®, Mozilla Firefox ...

Users will be provided with an URL to access ES-DMS SE, as well as a user name and password.

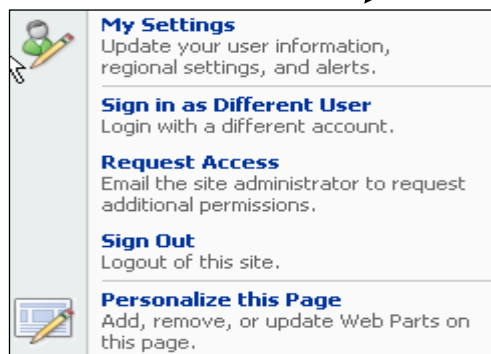
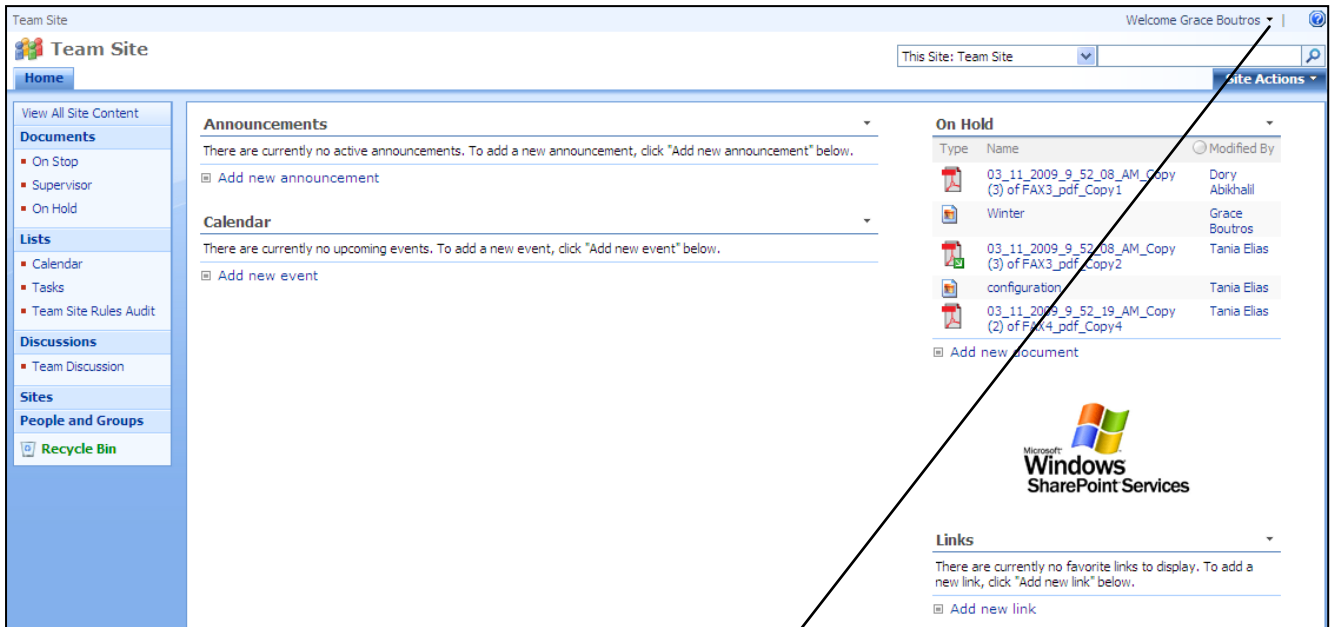
Once the user logs in, his capabilities depend on the permissions and privileges assigned to him by the system Administrator(s).

#### 2.1.2 LOG IN

Like all security context-enabled applications, the user is first presented with a login screen where he/she is requested to provide his/her credentials.

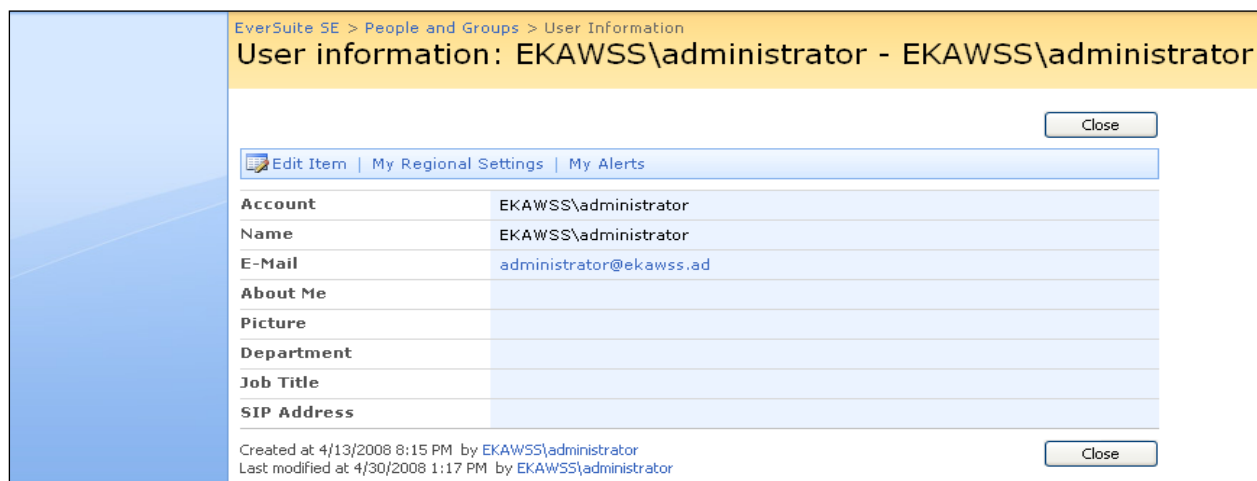


Upon a successful login, the user is next presented with SharePoint main screen shown below.

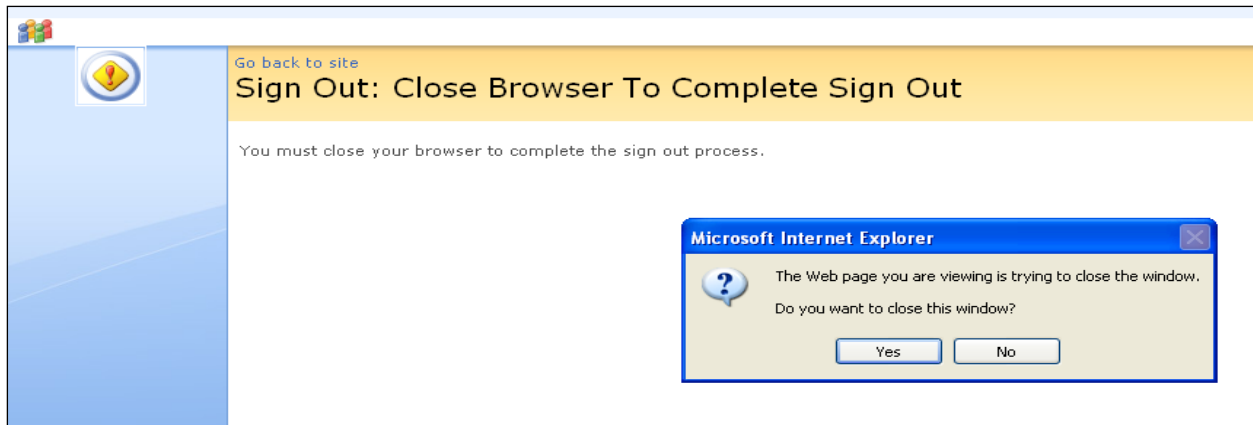


Once the user clicks on the User Profile menu, a drop down menu will appear as shown above. This menu provides sub-sections allowing the user to interact with their profiles' related operations like personal information, personal settings and log out.

- To view/update his information, regional settings, and alerts, the user must click on **My Settings**. The following page will open.

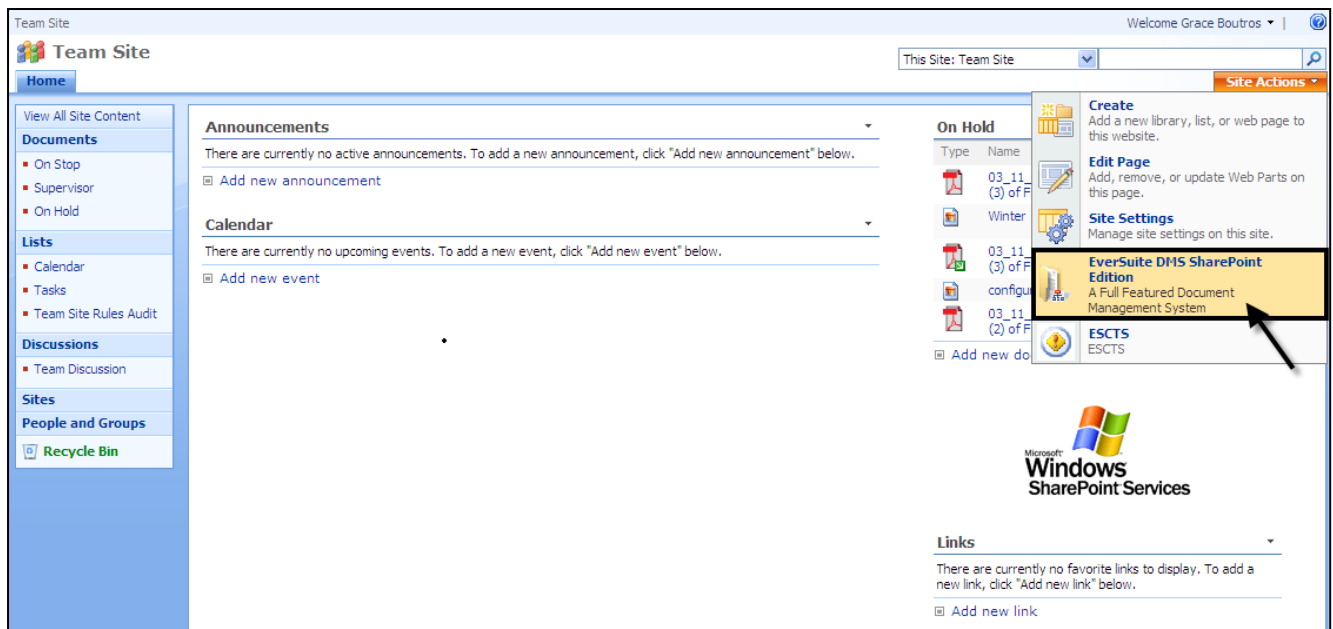


- To login with a different account, the user must click on **Sign in as Different User**.
- To logout of this site, the user must click on **Sign Out** and the following page will open. The user is prompted to confirm his/her sign out request.



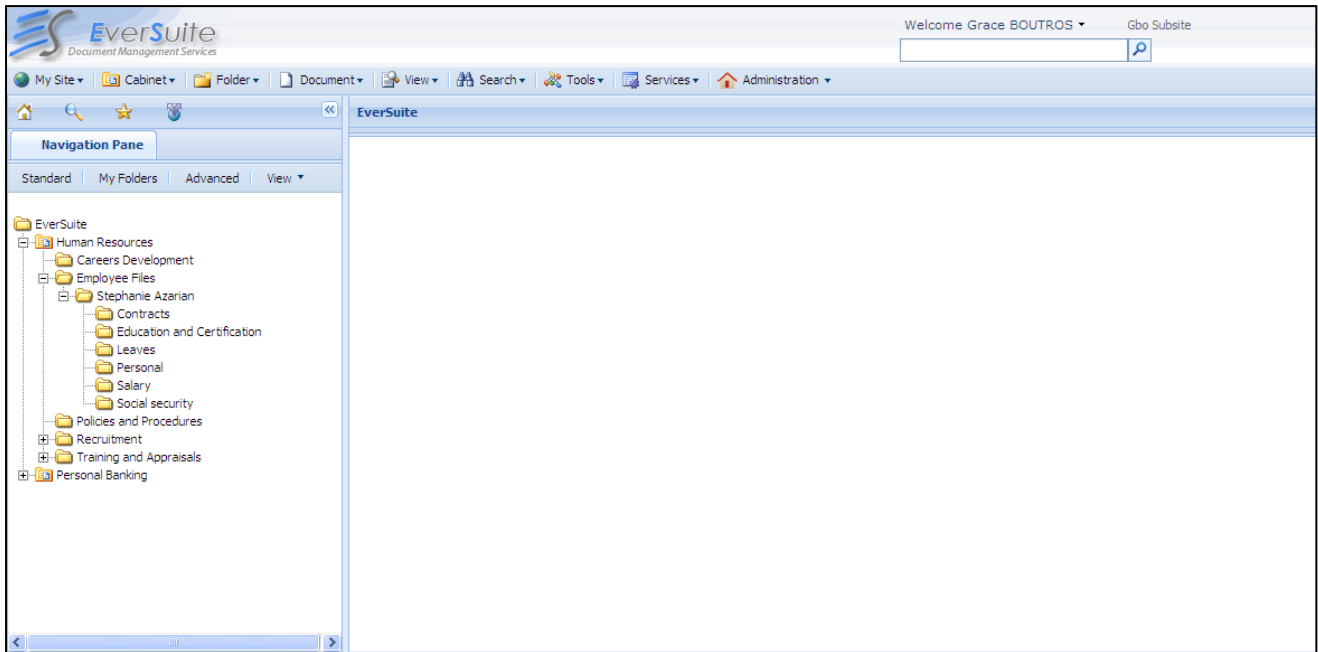
## 2.2 LOGIN TO ES-DMS SE

Users can access **ES-DMS SE** installed as a WSS site feature from the **Site Actions** menu.

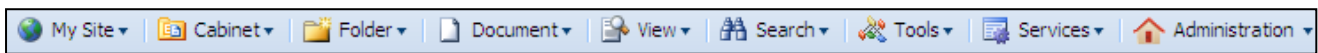


The user chooses a site then click **Site Actions** menu. A drop down menu will appear. The user selects **EverSuite DMS SharePoint Edition** menu and the application home page will open.





## 2.2.1 TOP NAVIGATION MENU



The upper-side of the screen shows the navigation menu providing the user with straightforward navigation links. These menu items are discussed in details later on.

Navigation Menu is displayed to the user at all times.

Users can access and use the following Menus according to their privileges.

Only the Administrator can see the Administration menu.

## 2.2.2 TABBED MDI INTERFACE







All operations are performed in a **Multiple Tabbed Document Interface**. The user does not experience any post back operations while interacting with the system.

## 2.2.3 USERS' QUICK LINKS




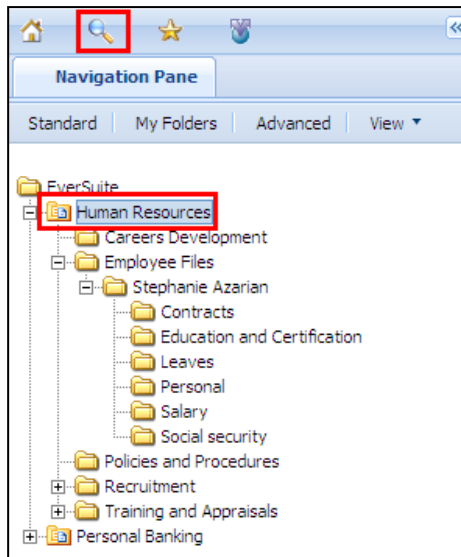
Quick Links allow the users to jump and/or access commonly used sections of the solution:

- **My Home**  : Opens Home Page.
- **Folder Search**  : Search for Folders within a selected cabinet or Folder in the Navigation Pane.
- **Add To Favorites**  : Add a selected folder to the user’s Favorite documents.
- **Raise an Issue**  : Enables system users to send requests or submit bugs to EVER support team.

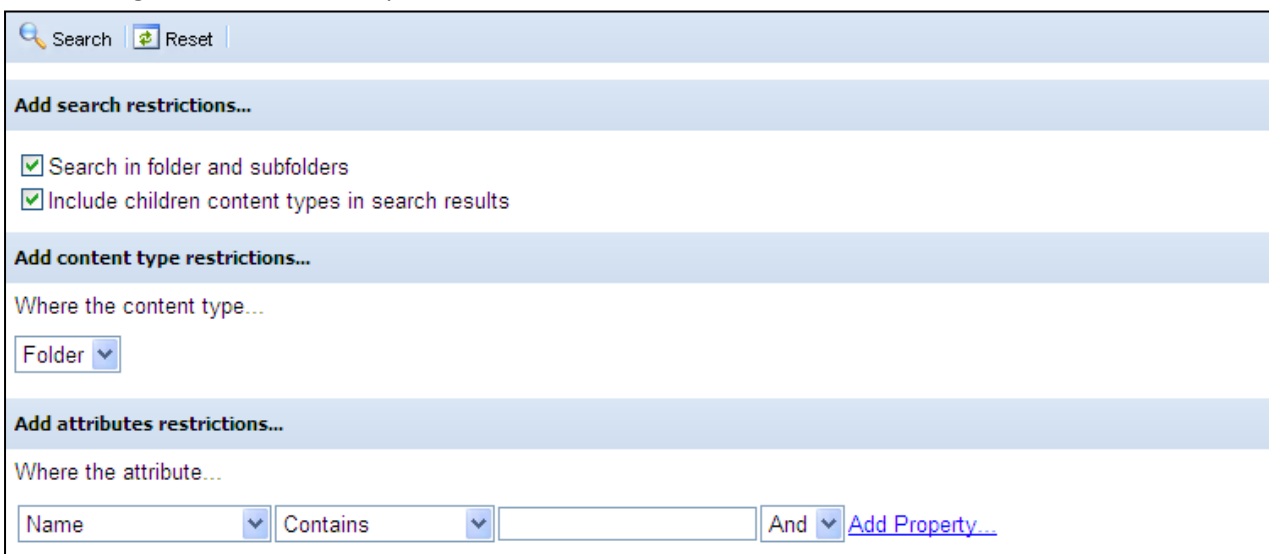
### 2.2.3.1 FOLDER SEARCH

This section allows the user to search for folders within a selected cabinet or folder in the Navigation Pane.

The user selects a folder or a cabinet then clicks on **Folder Search** icon 



The following search screen will open.



The search screen includes a search bar with a 'Search' button and a 'Reset' button. Below the search bar are three sections for adding restrictions:

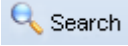
- Add search restrictions...**
  - Search in folder and subfolders
  - Include children content types in search results
- Add content type restrictions...**
  - Where the content type...
    - Folder
- Add attributes restrictions...**
  - Where the attribute...
    - Name
    - Contains
    - And
    - [Add Property...](#)

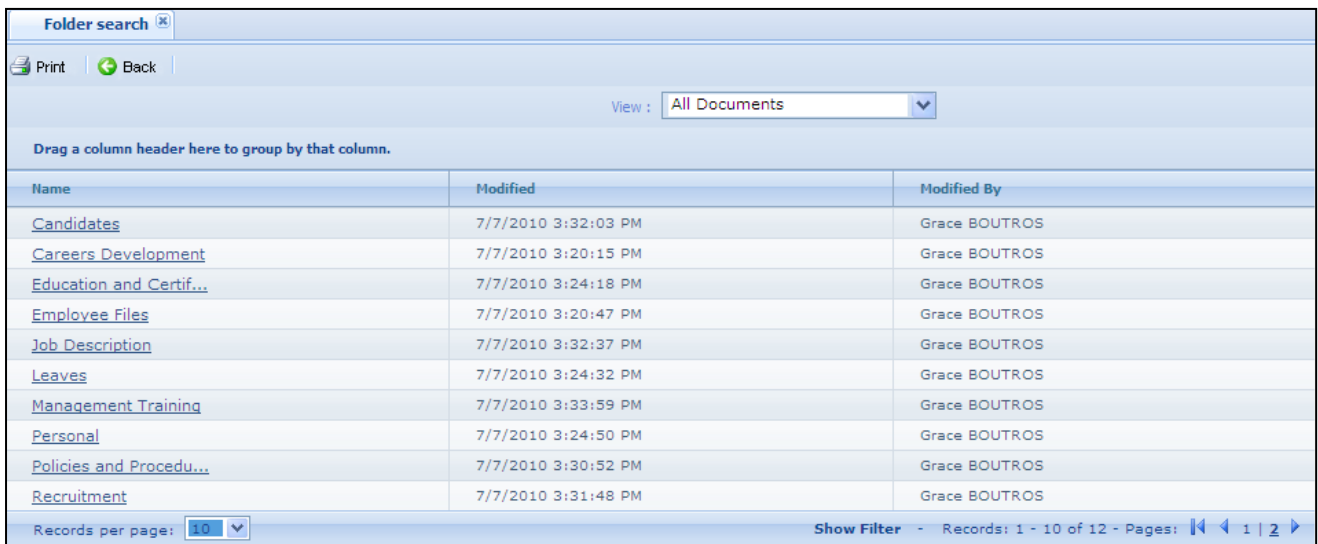
- **Search in folder and subfolders:** if checked, the user will be able to search in folders and subfolders of the selected item, and only content types set as visible will appear in content type restrictions.

- **Include children content types in search results:** if checked, it allows the user to search in the children of the selected content type.

The advanced layout of this section provides the user with many different ways of searching: by content type, by name, by type, etc...

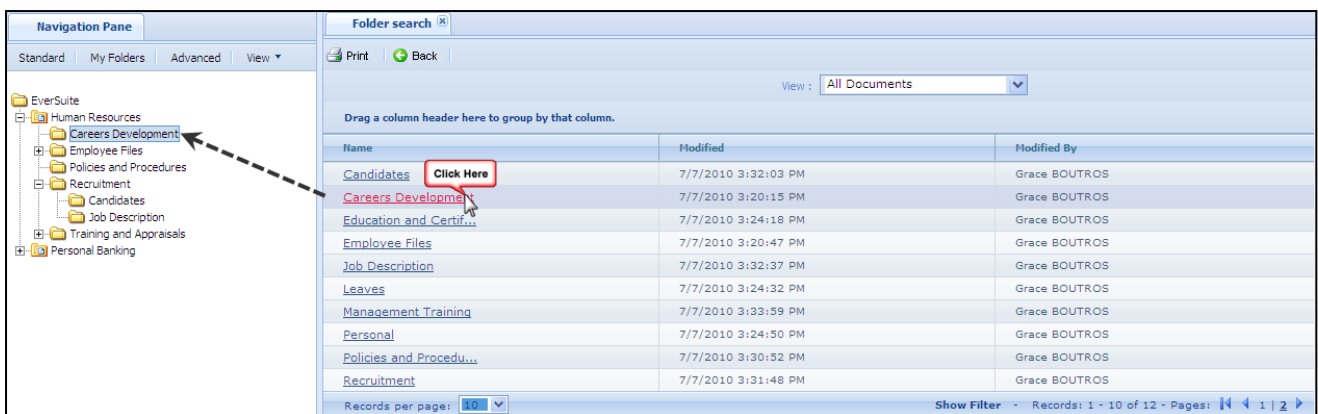
When the user selects a content type, the other search attributes will be filtered accordingly.

- To perform search, the user clicks the “Search” button  on the toolbar, and the results will be listed as shown in the figure below.




Name	Modified	Modified By
<a href="#">Candidates</a>	7/7/2010 3:32:03 PM	Grace BOUTROS
<a href="#">Careers Development</a>	7/7/2010 3:20:15 PM	Grace BOUTROS
<a href="#">Education and Certif...</a>	7/7/2010 3:24:18 PM	Grace BOUTROS
<a href="#">Employee Files</a>	7/7/2010 3:20:47 PM	Grace BOUTROS
<a href="#">Job Description</a>	7/7/2010 3:32:37 PM	Grace BOUTROS
<a href="#">Leaves</a>	7/7/2010 3:24:32 PM	Grace BOUTROS
<a href="#">Management Training</a>	7/7/2010 3:33:59 PM	Grace BOUTROS
<a href="#">Personal</a>	7/7/2010 3:24:50 PM	Grace BOUTROS
<a href="#">Policies and Procedu...</a>	7/7/2010 3:30:52 PM	Grace BOUTROS
<a href="#">Recruitment</a>	7/7/2010 3:31:48 PM	Grace BOUTROS

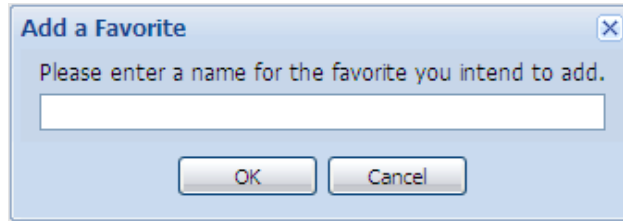
Search results will appear as a list of links. Once the user clicks on a link, the tree will expand and the correspondent folder will be selected as shown below.



Name	Modified	Modified By
<a href="#">Candidates</a>	7/7/2010 3:32:03 PM	Grace BOUTROS
<a href="#">Careers Development</a>	7/7/2010 3:20:15 PM	Grace BOUTROS
<a href="#">Education and Certif...</a>	7/7/2010 3:24:18 PM	Grace BOUTROS
<a href="#">Employee Files</a>	7/7/2010 3:20:47 PM	Grace BOUTROS
<a href="#">Job Description</a>	7/7/2010 3:32:37 PM	Grace BOUTROS
<a href="#">Leaves</a>	7/7/2010 3:24:32 PM	Grace BOUTROS
<a href="#">Management Training</a>	7/7/2010 3:33:59 PM	Grace BOUTROS
<a href="#">Personal</a>	7/7/2010 3:24:50 PM	Grace BOUTROS
<a href="#">Policies and Procedu...</a>	7/7/2010 3:30:52 PM	Grace BOUTROS
<a href="#">Recruitment</a>	7/7/2010 3:31:48 PM	Grace BOUTROS

### 2.2.3.2 ADD TO FAVORITES

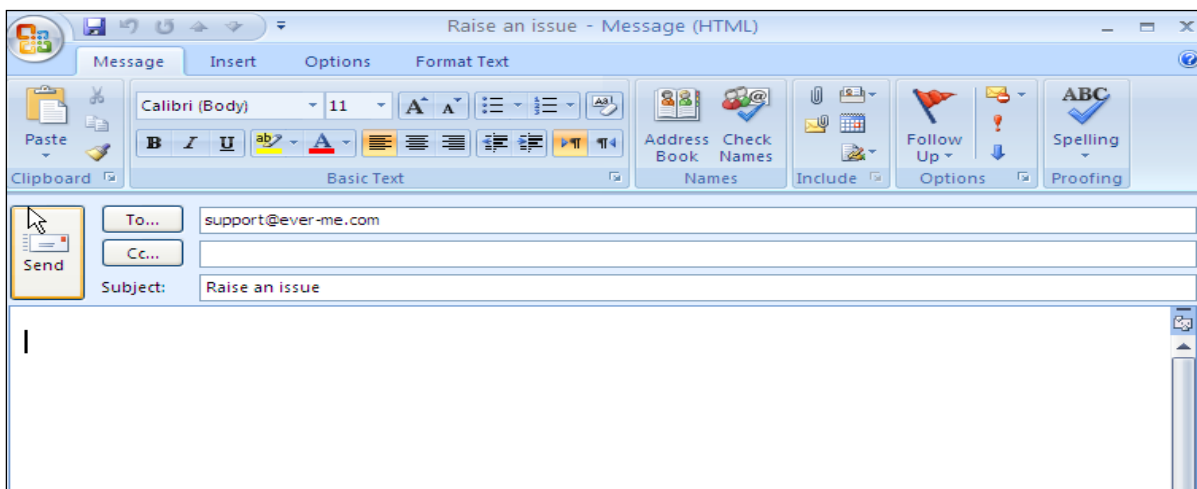
The user selects a folder or a cabinet then clicks on Add to Favorites icon . The following window will open asking for the favorite name.



The selected folder or cabinet will be added to the favorites. This section will be discussed in details later in this manual (section [2.9.1 Favorites](#)).


### 2.2.3.3 RAISE AN ISSUE

To report an issue to EVER’s support team, click on Raise an Issue icon . An empty e-mail will open.

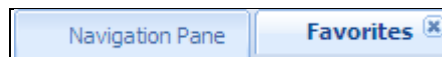


The email address of EVER’s support team is placed in the 'To...' box.

The user writes down the error or issue he would like to send then clicks **Send**.

Note: “Raise an Issue” must be enabled through the main configuration of the DMS-SE Application. If disabled, the users will not see the “Raise an Issue” button 

### 2.2.4 TABBED NAVIGATION INTERFACE



The Tabbed Navigation Interface provides a tabbed navigation window. This enables users to interact with different navigation sections at the same time.

## 2.2.5 NAVIGATION PANE



All navigation sections open in the left region of ES-DMS interface.

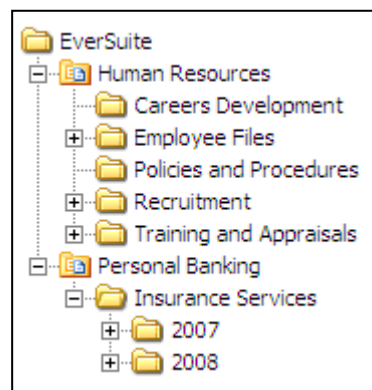
Users can select one of the following Tree Views from the tree toolbar:

- Standard
- My Folders
- Advanced
- View: all created custom trees

Users can easily explore Trees using the + sign to Expand the Folder and the – sign to Collapse it.

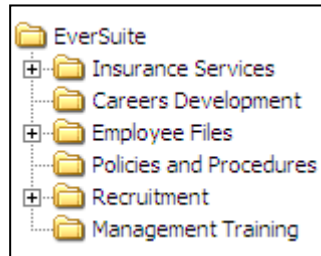
### 2.2.5.1 STANDARD TREE

Standard tab **Standard** opens the standard tree as shown below.



### 2.2.5.2 MY FOLDERS TREE

My folders tab **My Folders** opens the tree of the user’s personal folders.

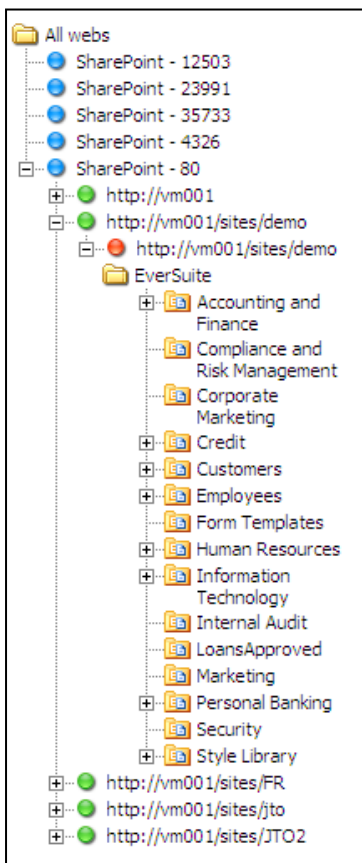


This section will be explained in details later in section [2.3.6 My Folders](#)


### 2.2.5.3 ADVANCED TREE

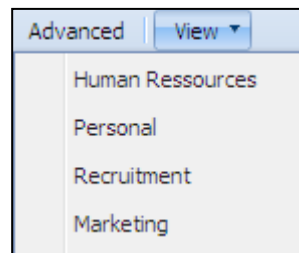
Advanced Tree tab **Advanced Tree** opens all web applications trees.

To view a tree, the user must select a web application, a site collection, then a site or a sub site to view the correspondent tree as shown below.

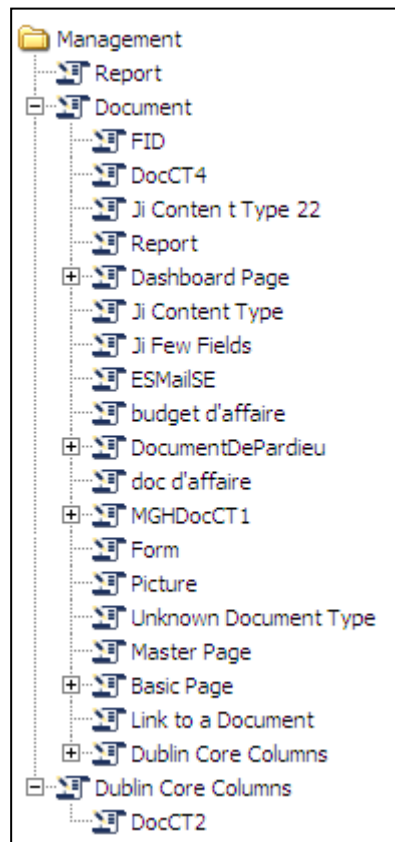


## 2.2.5.4 VIEW

View tab  opens a list of the created custom trees as shown in the figure below.



The user must select one of the created custom trees to view its content as shown below.

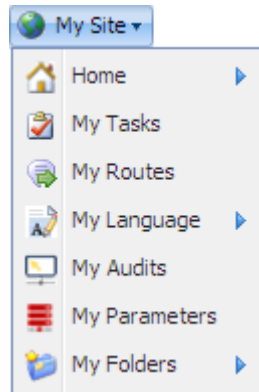


This custom tree is created by the administrator (Refer to section 3.9 in the Administrator Guide: Manage Custom Tree). It contains the values of the properties fields added while creating the tree.

The user double clicks a content type or a properties field to view the correspondent documents.

## 2.3 MY SITE MENU

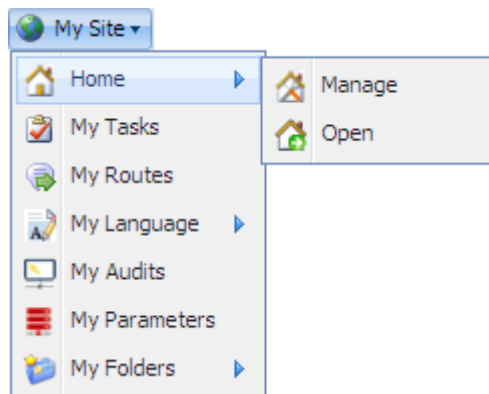
The menu “My Site” visible in the user Top Navigation Menu provides sub-sections allowing the user to manage his site’s interface.



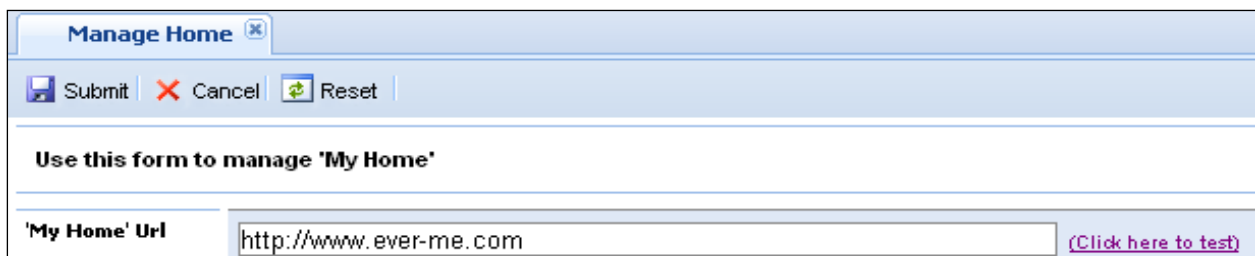
This section is divided into the following sub-categories:

### 2.3.1 HOME

Once the user clicks on Home, the menu will expand



- By clicking on **Manage**, the following page will open allowing the user to specify the User’s Home Page URL.




A screenshot of the 'Manage Home' form. The form has a title bar that says 'Manage Home'. Below the title bar are three buttons: 'Submit', 'Cancel', and 'Reset'. The main content of the form is a text input field labeled ''My Home' Url' containing the text 'http://www.ever-me.com'. To the right of the input field is a link that says '(Click here to test)'.

The user must enter a valid URL then click on  .



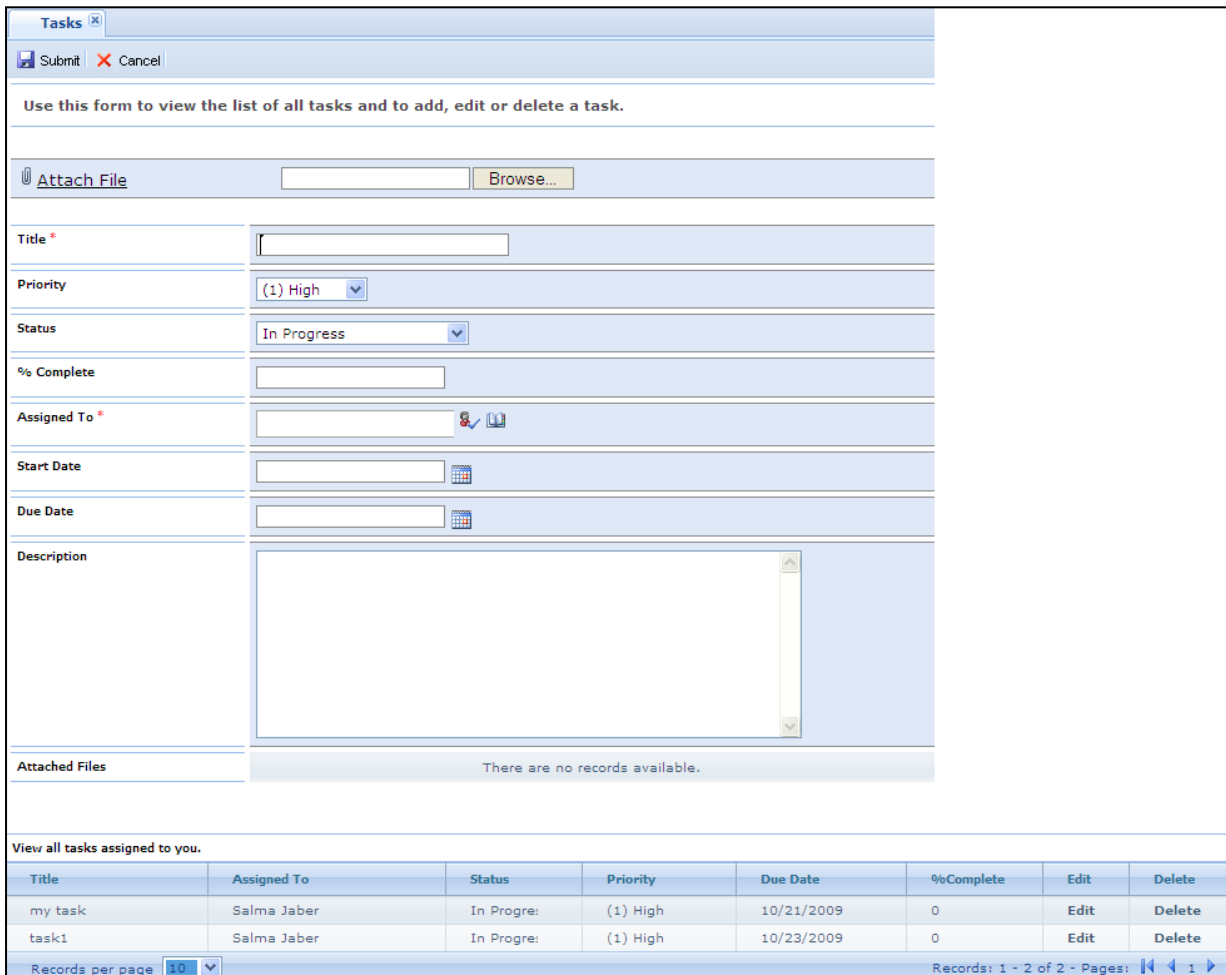
If the User does not specify an URL, the Home Page URL will be the one specified by the Administrator in the Site Preference section (described later in the manual).

- By clicking on **Open**, the home page will open having the URL previously specified in **Manage Home** tab.

This page can also be reached from the Home button  in the Quick Links Toolbar. [Section 2.2.3 “Users’ Quick Links”](#)

## 2.3.2 MY TASKS

By clicking on **My Tasks** the following page will open allowing the user to add/edit/delete tasks. User tasks will be listed in a grid, in the bottom of the page.



Tasks [x]

Submit Cancel

Use this form to view the list of all tasks and to add, edit or delete a task.



Attach File  Browse...


Title \*


Priority (1) High

Status In Progress

% Complete

Assigned To \*   

Start Date  

Due Date  

Description

Attached Files There are no records available.

View all tasks assigned to you.

Title	Assigned To	Status	Priority	Due Date	%Complete	Edit	Delete
my task	Salma Jaber	In Progre:	(1) High	10/21/2009	0	Edit	Delete
task1	Salma Jaber	In Progre:	(1) High	10/23/2009	0	Edit	Delete


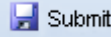
Records per page 10


Records: 1 - 2 of 2 - Pages: 1

- To add a new task, the user simply needs to fill in the task’s fields and then click on **Submit** button



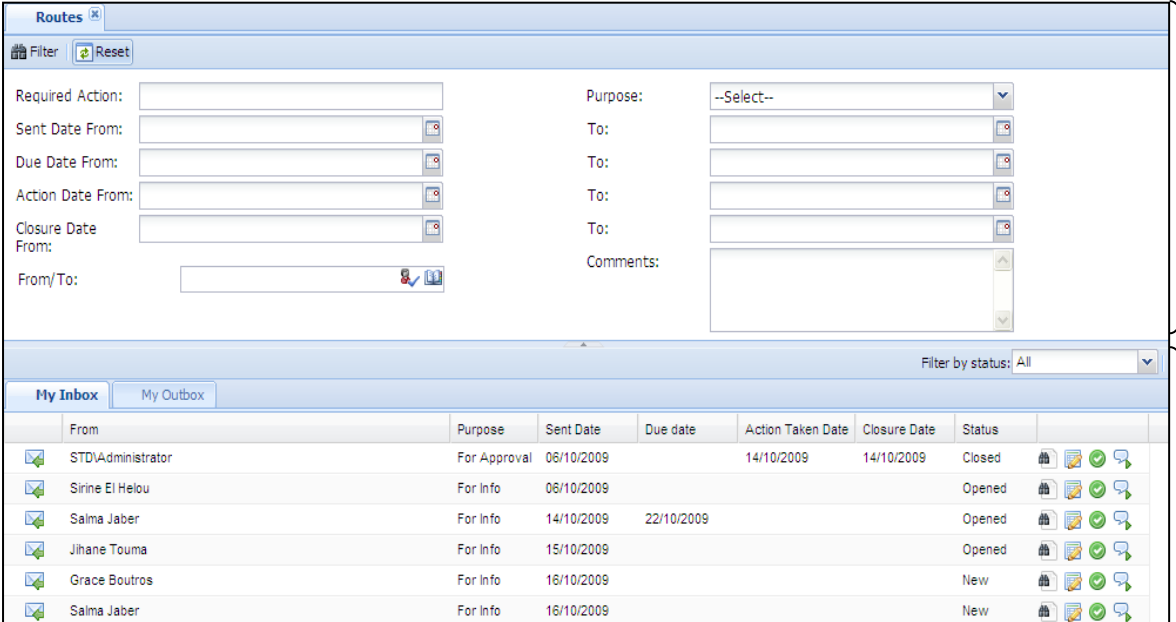
- Editing an existing task is as easy as adding a new one.

To edit a task, user must click on the Edit button  on the same row of the selected task. The screen will show the same fields used for insertion, but this time they will be filled with their existing values. User must make his changes and then click on Submit button .

- To delete a task, user must click on the Delete button  on the same row of the selected task. The task will be immediately deleted and removed from the task list.

### 2.3.3 MY ROUTES

By clicking on **My Routes**, the following page will open allowing the user to view all routes assigned to him. (My Inbox and My Outbox)



The screenshot shows the 'My Routes' interface. At the top, there is a 'Filter' section with a 'Reset' button. Below this are various input fields for filtering routes, including 'Required Action', 'Sent Date From', 'Due Date From', 'Action Date From', 'Closure Date From', 'From/To', 'Purpose', and 'To' (multiple instances). A 'Comments' text area is also present. Below the filter area, there are two tabs: 'My Inbox' and 'My Outbox'. The 'My Inbox' tab is selected, and it displays a table of routes. The table has columns for 'From', 'Purpose', 'Sent Date', 'Due date', 'Action Taken Date', 'Closure Date', and 'Status'. The data rows show routes from 'STD\Administrator', 'Sirine El Helou', 'Salma Jaber', 'Jihane Touma', 'Grace Boutros', and 'Salma Jaber' with various purposes and dates.

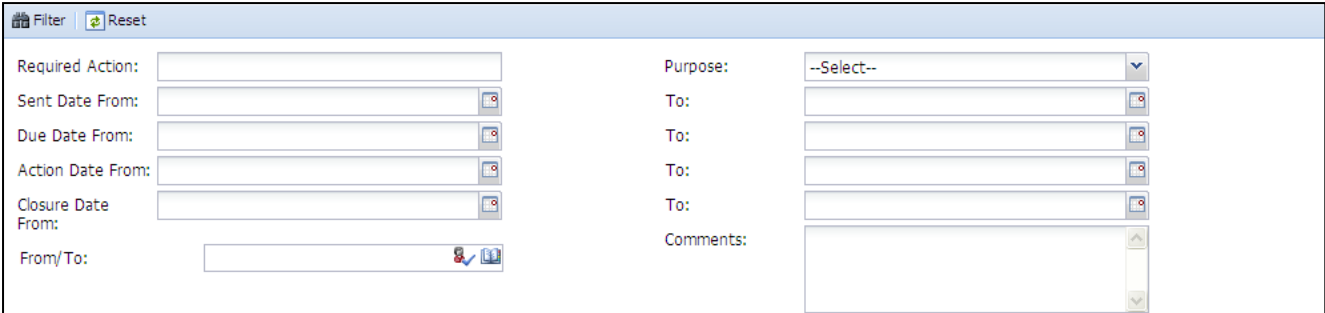
From	Purpose	Sent Date	Due date	Action Taken Date	Closure Date	Status
STD\Administrator	For Approval	06/10/2009		14/10/2009	14/10/2009	Closed
Sirine El Helou	For Info	06/10/2009				Opened
Salma Jaber	For Info	14/10/2009	22/10/2009			Opened
Jihane Touma	For Info	15/10/2009				Opened
Grace Boutros	For Info	16/10/2009				New
Salma Jaber	For Info	16/10/2009				New

Annotations in the image point to the 'Filter area' (top section) and the 'Inbox and Outbox area' (table and tabs section).

This screen is divided into two sections: the filter area and the inbox and outbox tabs.

#### 2.3.3.1 FILTER AREA

The filter area allows the user to filter routes according to criteria entered. The system will only filter the selected tab. If the inbox tab is selected the inbox grid only will be filtered.



This is a close-up view of the filter area from the 'My Routes' interface. It shows the 'Filter' button, 'Reset' button, and the various input fields for filtering routes: 'Required Action', 'Sent Date From', 'Due Date From', 'Action Date From', 'Closure Date From', 'From/To', 'Purpose', and 'To' (multiple instances). A 'Comments' text area is also visible.

### 2.3.3.2 INBOX SCREEN

The inbox screen will display all routes received by the logged in user as shown below.

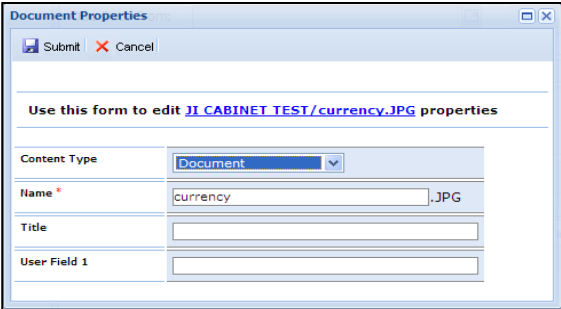
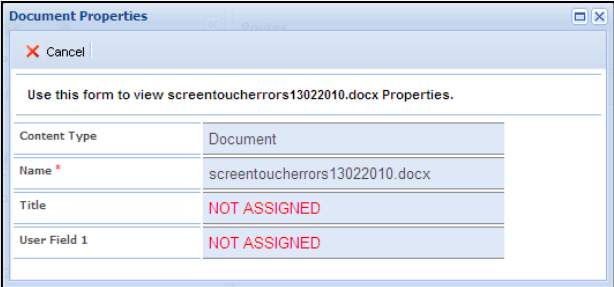
								Filter by status: All
My Inbox		My Outbox						
	From	Purpose	Sent Date	Due Date	Action Taken Date	Closure Date	Status	
	STD\Administrator	For Approval	06/10/2009		14/10/2009	14/10/2009	Closed	
	Sirine El Helou	For Info	06/10/2009				Opened	
	Salma Jaber	For Info	14/10/2009	22/10/2009			Opened	
	Jihane Touma	For Info	15/10/2009				Opened	
	Grace Boutros	For Info	16/10/2009				Opened	
	Salma Jaber	For Info	16/10/2009				Opened	

The grid will provide brief information about the route: From, Purpose, Sent Date, Due Date, ... The user will have to open the route record to view the remaining information about the route record.


Four buttons appear in the last column to the right. The functionalities of these buttons depend on the user's rights and permissions:

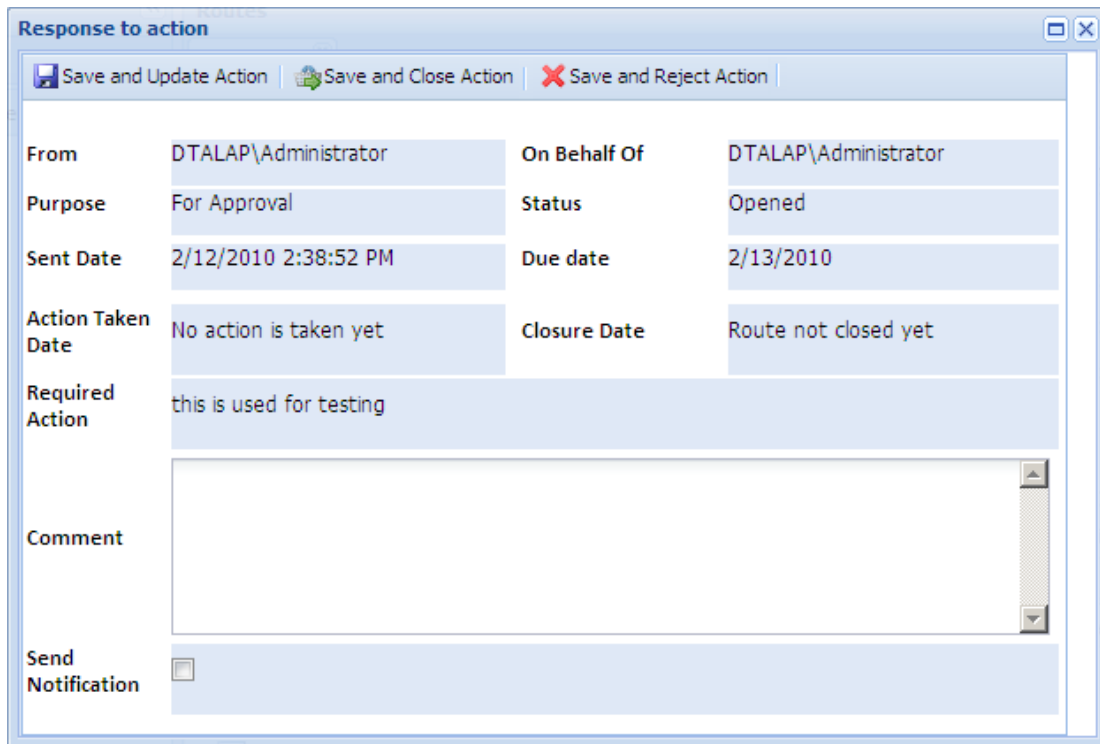
- If the user has a read only permission, the document and document properties will open in view mode
- If the user has an edit permission, the document and document properties will open in edit mode
- If the user has no permission, he will be granted a read only permission once one of these buttons is clicked, and the document and document properties will open in read only mode.

- Document : allows the user to open the document routed in view or edit mode according to the user's permission.
- Document Properties : allows the user to open the document properties in view or edit mode according to the user's permission.

<u>Edit</u>	<u>View</u>
	

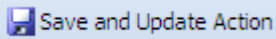
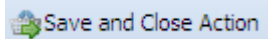
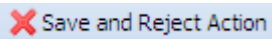
### 2.3.3.2.1 RESPONSE TO ACTION

**Response to action** button  will open a window to view only the route information. Only the comments field will be editable as shown in the figure below:




From	DTALAP\Administrator	On Behalf Of	DTALAP\Administrator
Purpose	For Approval	Status	Opened
Sent Date	2/12/2010 2:38:52 PM	Due date	2/13/2010
Action Taken Date	No action is taken yet	Closure Date	Route not closed yet
Required Action	this is used for testing		
Comment	<input type="text"/>		
Send Notification	<input type="checkbox"/>		

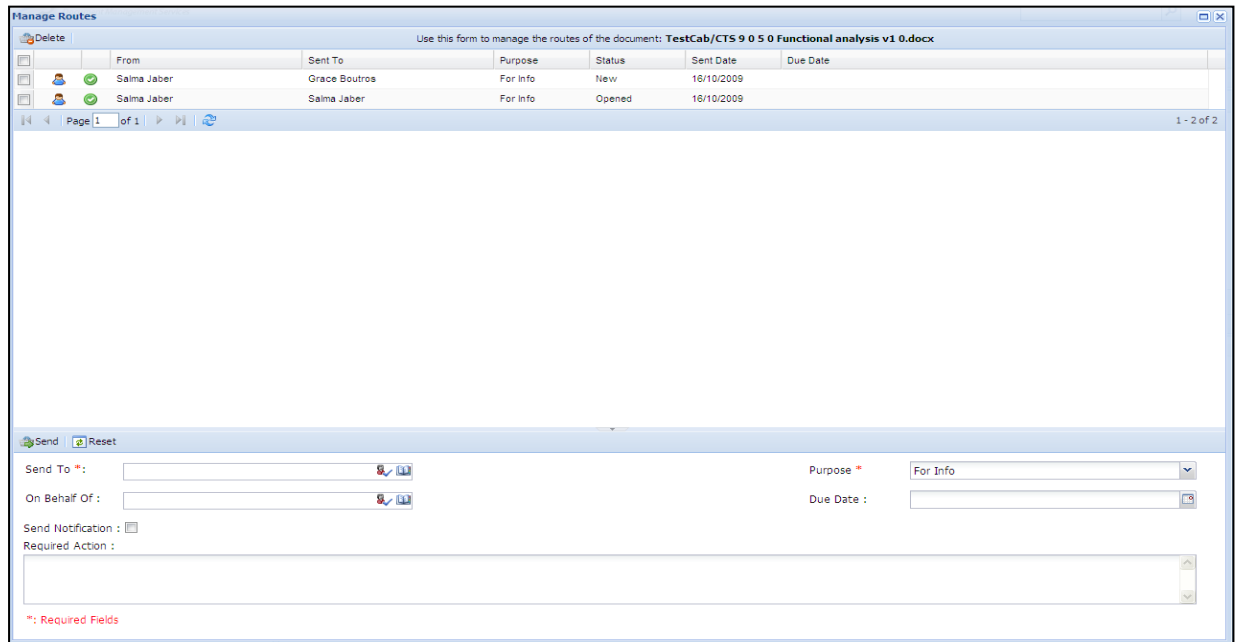
The user must add his comments then he may either click on:

-  to save modifications (the status of the selected route is now "In progress")
-  to save modifications and close the route (the status of the selected route is now "Closed")
-  to save modifications and reject the route (the status of the selected route is now "Rejected")

**N.B:** Upon opening the route for viewing, its status will change from **New** to **Opened**.

### 2.3.3.2.2 MANAGE ROUTES

Clicking on **Manage Routes**  button will open the following page allowing the user to access the document route management as shown below:



Use this form to manage the routes of the document: **TestCab/CTS 9 0 5 0 Functional analysis v1 0.docx**

	From	Sent To	Purpose	Status	Sent Date	Due Date
	Salma Jaber	Grace Boutros	For Info	New	16/10/2009	
	Salma Jaber	Salma Jaber	For Info	Opened	16/10/2009	

Page 1 of 1

Send Reset

Send To \*:  Purpose \*: For Info

On Behalf Of:  Due Date:

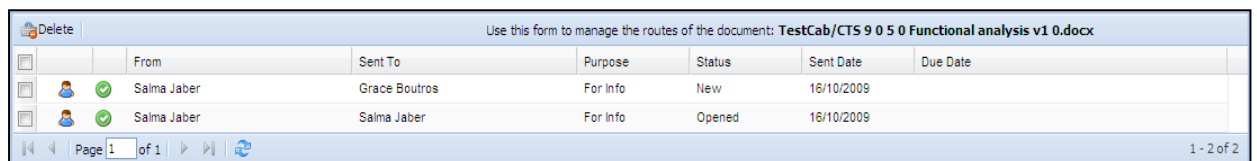
Send Notification:

Required Action:

\*: Required Fields

The screen is divided into two sections:

- 1- The grid will display all routes related to the parent document of the selected route.




Use this form to manage the routes of the document: **TestCab/CTS 9 0 5 0 Functional analysis v1 0.docx**

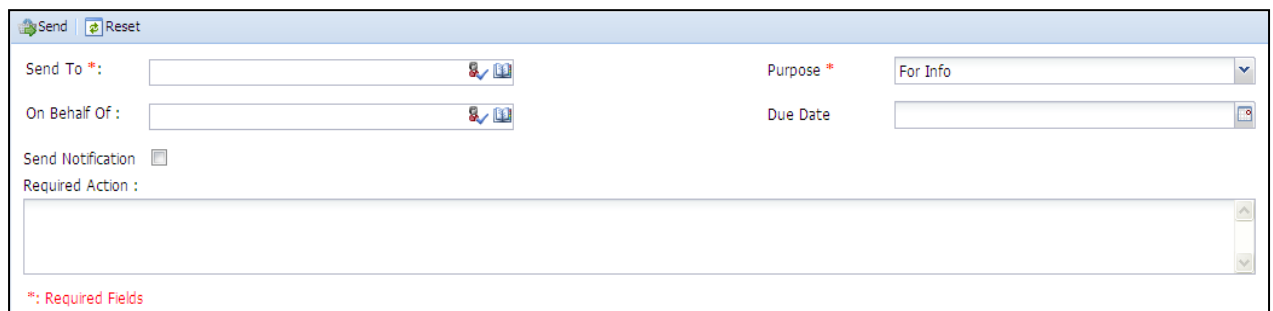
	From	Sent To	Purpose	Status	Sent Date	Due Date
	Salma Jaber	Grace Boutros	For Info	New	16/10/2009	
	Salma Jaber	Salma Jaber	For info	Opened	16/10/2009	

Page 1 of 1

The user will be able to view the routes properties by clicking on Routes Properties button.

**N.B:** only the administrator will be able to delete routes using the delete button 

- 2- The add route form is used to add a new route corresponding to the selected document. This form is visible for users with "Manage Lists" permission.



Send Reset


Send To \*:  Purpose \*: For Info

On Behalf Of:  Due Date:

Send Notification:

Required Action:

\*: Required Fields

The user must fill the necessary fields then click on  button to send the route to the selected user.

### 2.3.3.3 OUTBOX SCREEN

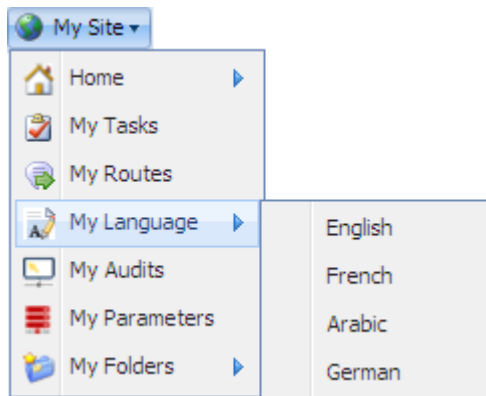
The outbox screen displays all routes sent by the logged in user to other users.

My Inbox		My Outbox						
Sent To	Purpose	Sent Date	Due Date	Action Taken Date	Closure Date	Status		
Jihane TOUMA	For info	10/03/2010		10/03/2010	10/03/2010	Closed		
Jihane TOUMA	For info	10/03/2010		11/03/2010	11/03/2010	Closed		
Jihane TOUMA	For info	10/03/2010		10/03/2010		In Progress		
Grace BOUTROS	For info	10/03/2010		10/03/2010		In Progress		
Jihane TOUMA	For info	10/03/2010		10/03/2010	10/03/2010	Closed		
Jihane TOUMA	For info	11/03/2010		11/03/2010	11/03/2010	Rejected		

The manipulation is the same as explained above in Inbox screen. The only exception is that the user cannot response to action, he can only view the route properties using View Route Properties button .

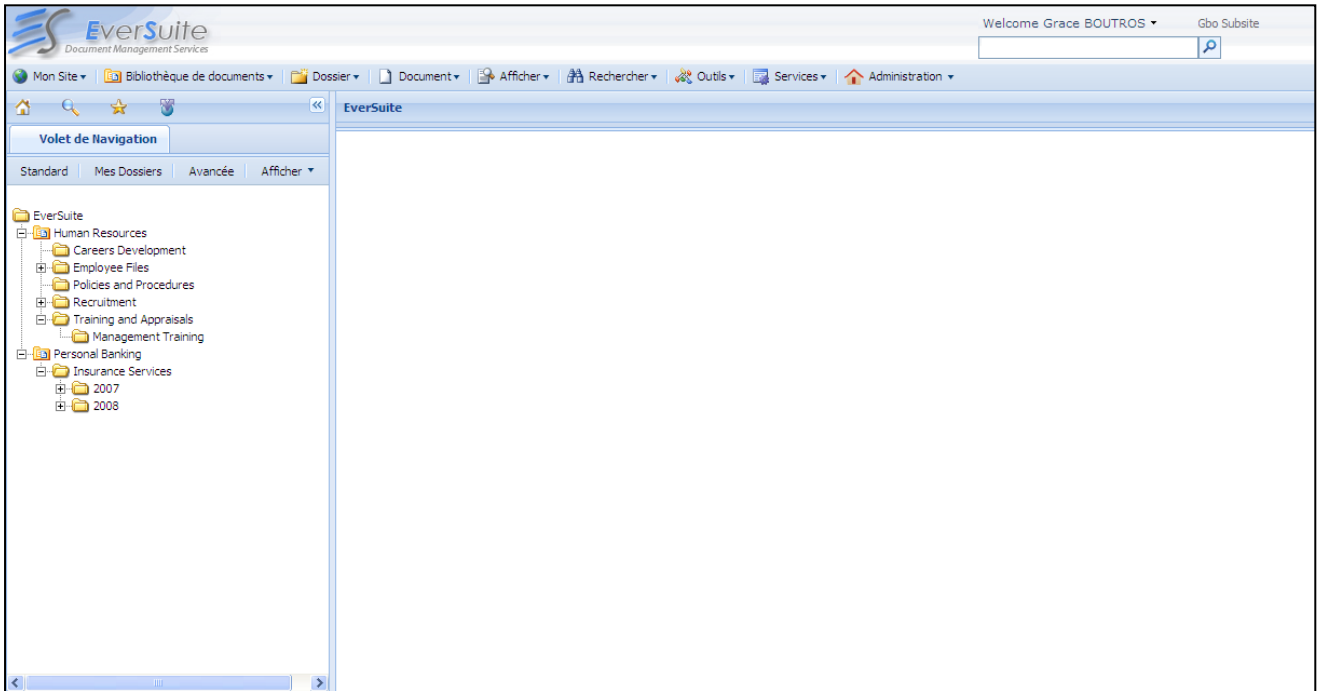
### 2.3.4 MY LANGUAGE

Once the user clicks on “**My Language**”, the menu will expand

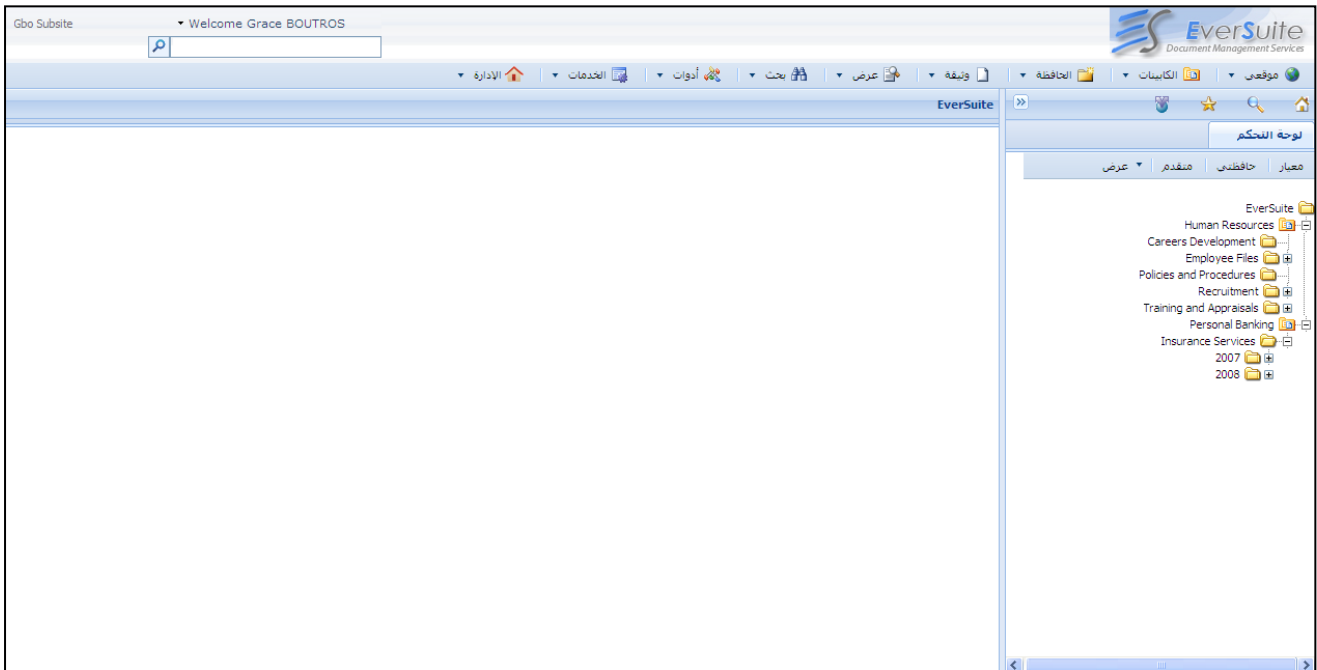


User then proceeds to select his preferred DMS language display. This selection will affect only the correspondent user.

DMS French Home Page:



DMS Arabic Home Page:



### 2.3.5 My AUDITS

By clicking on **My Audits** the following page will open allowing the user to view his own audits.

Use this form to view your audits.

Action Type:    
 Action From Date:   Action To Date:

Event	Occurred	User	Object
Update	10/20/2009 11:...	Salma Jaber	Lists/Tasks/8_000
View	10/20/2009 10:...	Salma Jaber	Pages/Default.aspx
View	10/20/2009 10:...	Salma Jaber	PublishingImages
View	10/20/2009 10:...	Salma Jaber	PublishingImages/new.sarticleimage.jpg
View	10/20/2009 10:...	Salma Jaber	Pages
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Update	10/20/2009 08:...	Salma Jaber	JI CABINET TEST/FOLDER 1/sub folder1/ytrm/TESTCONTENT SEARCH.txt
Update	10/20/2009 08:...	Salma Jaber	JI CABINET TEST/FOLDER 1/sub folder1/ytrm/TESTCONTENT SEARCH.txt
Update	10/20/2009 08:...	Salma Jaber	JI CABINET TEST
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Search	10/20/2009 08:...	Salma Jaber	
Delete	10/20/2009 08:...	Salma Jaber	JI CABINET TEST/articlestest.txt
ChildDelete	10/20/2009 08:...	Salma Jaber	JI CABINET TEST
Delete	10/20/2009 08:...	Salma Jaber	JI CABINET TEST/4101980.txt

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This part will be explained in details later in the manual: section [2.11.1 Audit Trail](#)

### 2.3.6 MY PARAMETERS

By clicking on **My Parameters**, the following page will open allowing the user to select the multiple upload page mode: SharePoint or Maxim.

**My Parameters** x

Multiple upload page mode.  
Select your multiple upload page mode.

Using Sharepoint page.

Using Maxim.

This part will be explained in details later in section [2.7.2.2 Adding Multiple Files.](#)

### 2.3.7 MY FOLDERS

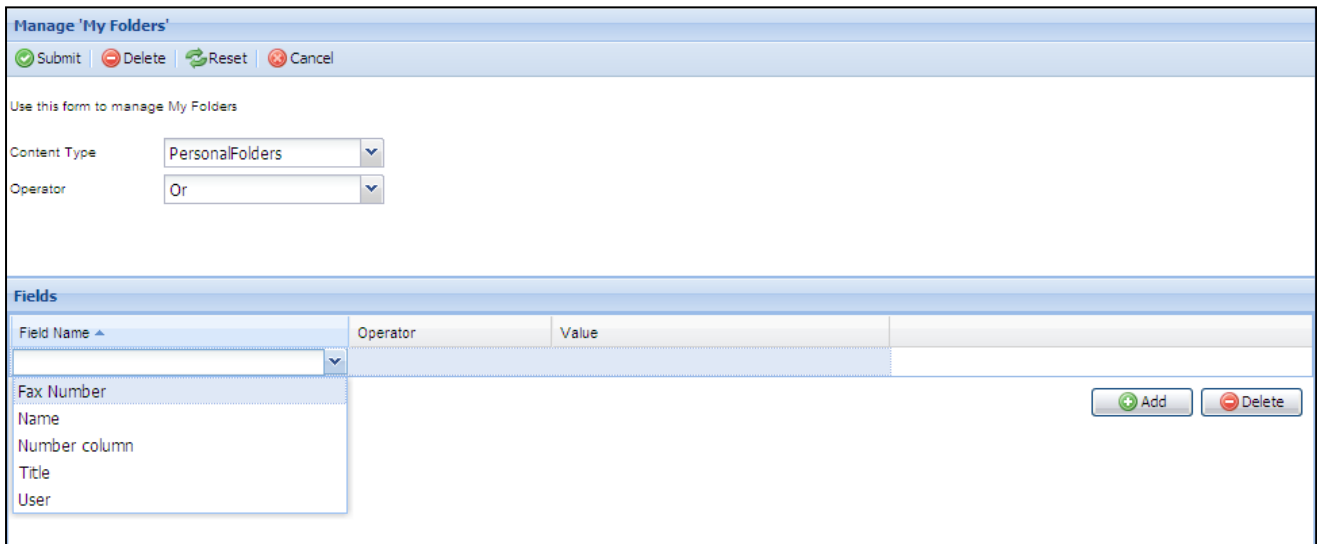
Once the user clicks on **“My Folders”**, the menu will expand allowing the user to set the properties that characterize a folder as ‘My Folders’ and \or view My Folders tree.






### 2.3.7.1 MANAGE MY FOLDERS

Clicking on **My Folders** → **Manage** will open the following page allowing the user to set the properties that characterize a folder as "**My Folders**"



The user must select a content type, and/or add additional criteria in **Fields** grid to filter the folders accordingly then click on submit button .

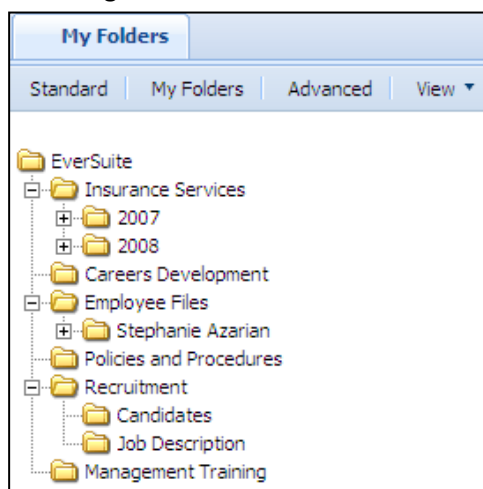
The Content Type list is filled with available content types on the current website. When selecting a content type, the column 'Field name' will be filled by the fields of the selected content type.

The column 'Operator' will be filled according to the selected 'Field Name'.

The folders matching the criteria will be set as My Folders and appear in My Folders tree.

### 2.3.7.2 VIEW MY FOLDERS

To view my folders tree, the user must click on **My Folder** → **View**, or on **My Folder** tab in the **Navigation pane**. My folders tree will open in the navigation Pane as shown below.



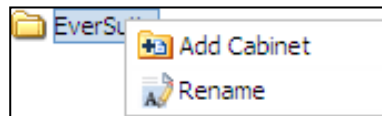
In both cases, the user is switched automatically to 'My Folders' pane and all folders responding to the configuration executed in 'Manage My Folders' are available in a tree as first level nodes. All subfolders of 'My Folders' are available in the tree.

All actions (Context Menu Actions and Toolbar actions) are applied to ‘My Folders’ and their subfolders.

## 2.4 ROOT NODE

### 2.4.1 ROOT NODE CONTEXT MENU

Some of the top navigation menu operations are available in the context menu of the relevant node(s). Right click on the root node to view the Context Menu.



- Click **Add Cabinet** to add a new Cabinet. (Refer to [section 2.5.1 Adding Cabinets](#))
- Click **Rename** to rename the root node

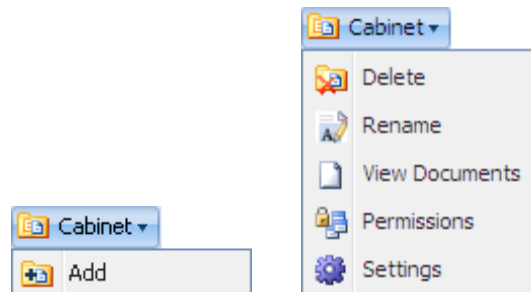
## 2.5 CABINET

A cabinet is a location on a site where Files can be created, collected, updated, and managed by Users. A cabinet is a collection of many Folders and File types that users can share with team members.

In a cabinet, the user can perform the following actions:

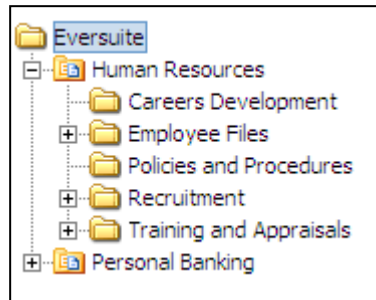
- Create and Manage Views
- Track Versions
- Check Out Files
- Stay Informed about changes
- Define Content Types
- Require Document Approval
- Specify Permissions
- Create Workflows

The menu “Cabinet” visible in the user Top Navigation Menu provides sub-menus allowing the user to add/delete/rename/ Cabinets, view Cabinet’s documents and manage Cabinet’s permissions and settings.

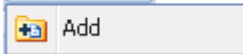


## 2.5.1 ADDING CABINETS

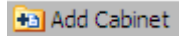
This section allows the user to add a new Cabinet.



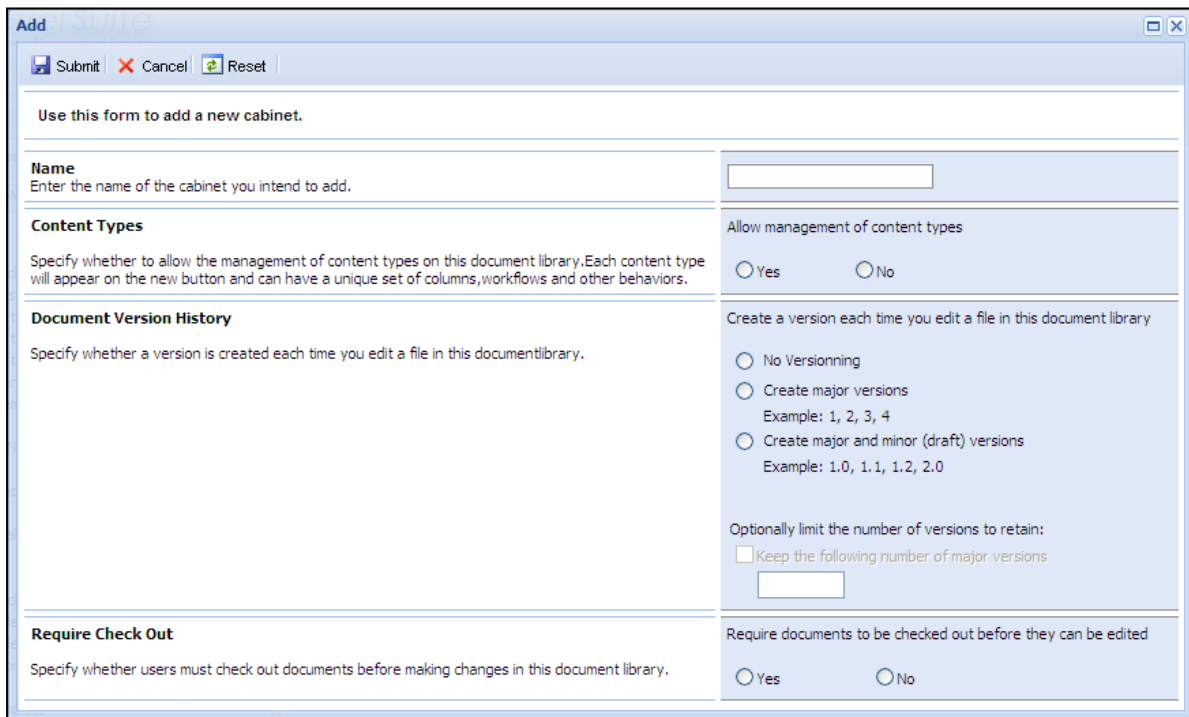
To add a new Cabinet the user selects the root node from the tree then click the “Add” button



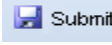
in the cabinet menu, or click on Add Cabinet



in the root node right click menu. He/she will be presented with a new form asking for details about the new Cabinet as shown below.

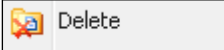


The user must:

- Enter the name of the cabinet he wants to add
- Specify whether to allow the management of content types on this document library
- Specify whether a version is created each time you edit a file in this document library
- Specify whether users must check out documents before making changes in this document library
- Click on **Submit** button . The Cabinet will be added to the tree in the Navigation Pane.

## 2.5.2 DELETING CABINETS

The user must choose a cabinet from the tree in the navigation pane then press the **Delete** button



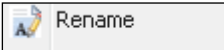
in the cabinet menu. The cabinet will be deleted after a confirmation message.

Deleting a Cabinet will result in deleting all its content; Folders and Documents.

A deleted cabinet is sent to the recycle bin; administrators can either restore or delete the cabinet permanently.

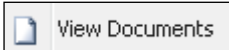
### 2.5.3 RENAMING CABINETS

The user must choose a cabinet from the tree in the navigation pane then press the **Rename** button






in the cabinet menu to rename the selected cabinet.

### 2.5.4 VIEWING CABINETS' DOCUMENTS

To view cabinet's documents, the user must either double click on the cabinet name or choose a cabinet from the tree in the navigation pane then press the **View Documents** button  in the cabinet menu.

The list of the cabinet associated documents will open in the services pane.

Type	Links	Name	Modified	Modified By	Status
		ALEX - CONTRACT OF EMPLOYMENT.docx	9/13/2010 11:37:06 AM	EVER-ME\gbo	
		JANE - CONTRACT OF EMPLOYMENT.docx	9/13/2010 11:52:58 AM	EVER-ME\gbo	
		MARK - CONTRACT OF EMPLOYMENT.docx	9/13/2010 11:37:21 AM	EVER-ME\gbo	

When specifying a view for the document library in SharePoint, the user must specify whether to show all items in the cabinet including the documents in folders and subfolders, or to show items inside folders only.

In case the checkbox **Include the subfolder's documents** is checked, all documents in the cabinet folders and subfolders will appear. Otherwise, only the documents of the selected cabinets will appear.

**Folders**

Specify whether to navigate through folders to view items, or to view all items at once.

Folders or Flat:

Show items inside folders

Show all items without folders

The user can also specify the groups and subgroups as well as the order in which the items are displayed.

- In the Sort section, the user can choose whether and how he wants the information to be sorted. He can use two columns for the sort.

**Sort**

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:

ID

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

Title

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

- In the Group By section, the user can group items with the same value in their own section.

**Group By**

Select up to two columns to determine what type of group and subgroup the items in the view will be displayed in. [Learn about grouping items.](#)

First group by the column:

Title

Show groups in ascending order (A, B, C, or 1, 2, 3)

Show groups in descending order (C, B, A, or 3, 2, 1)

Then group by the column:

Content Type

Show groups in ascending order (A, B, C, or 1, 2, 3)

Show groups in descending order (C, B, A, or 3, 2, 1)

By default, show groupings:

Collapsed  Expanded


Number of groups to display per page:

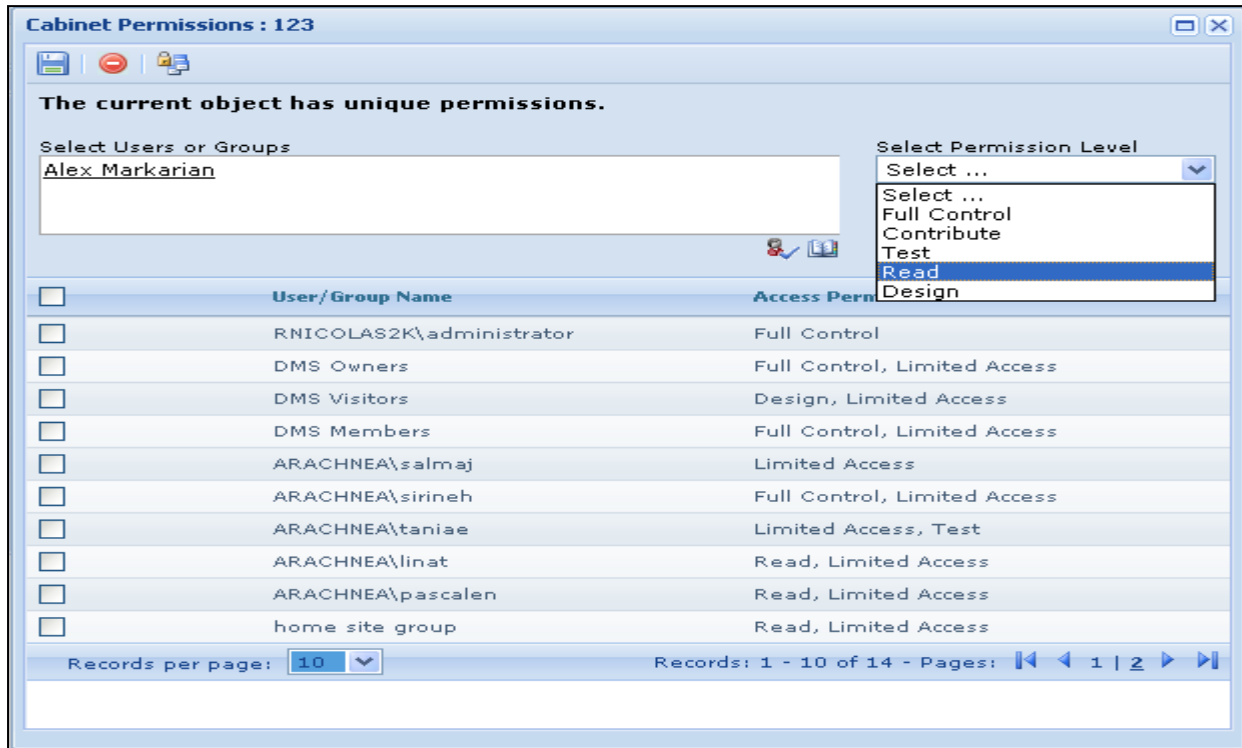
100


## 2.5.5 CABINET PERMISSIONS


This section manages the user's permissions on the selected cabinet. This section allows the user to add/edit/delete permissions on the selected cabinet.

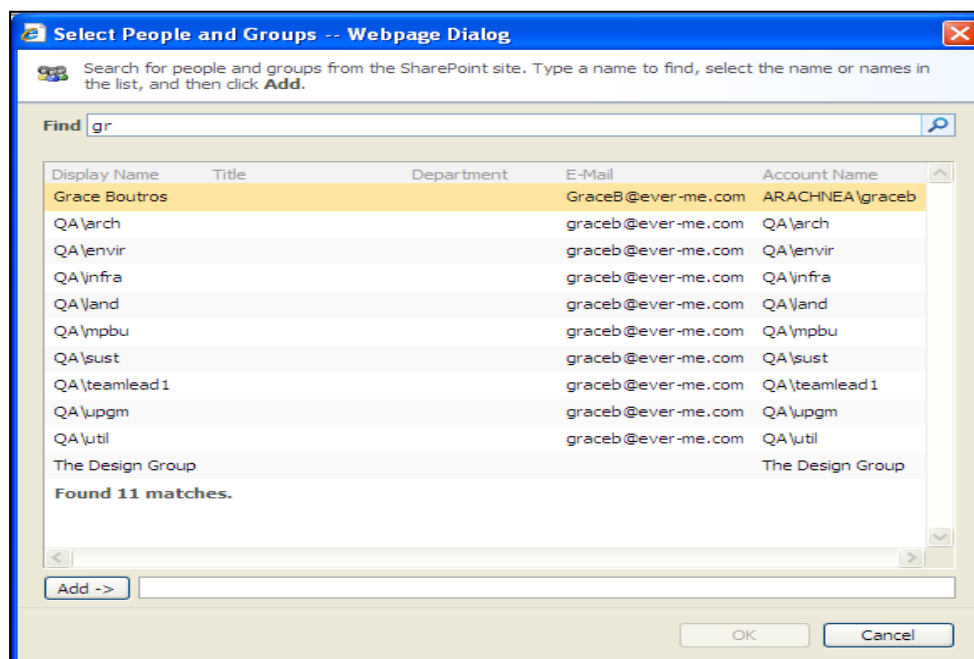
### 2.5.5.1 ADDING CABINET PERMISSION

To add a cabinet permission, the user must choose a cabinet from the tree in the navigation pane then press the **Permissions** button  **Permissions** in the cabinet menu and the following page will open.




The user must select users or groups, select Permission level and then click on  button to save the assigned privileges.

He can enter the users or groups to which he wants to give permission or search for people or groups from the SharePoint site by clicking on browse  button. The following page will open.




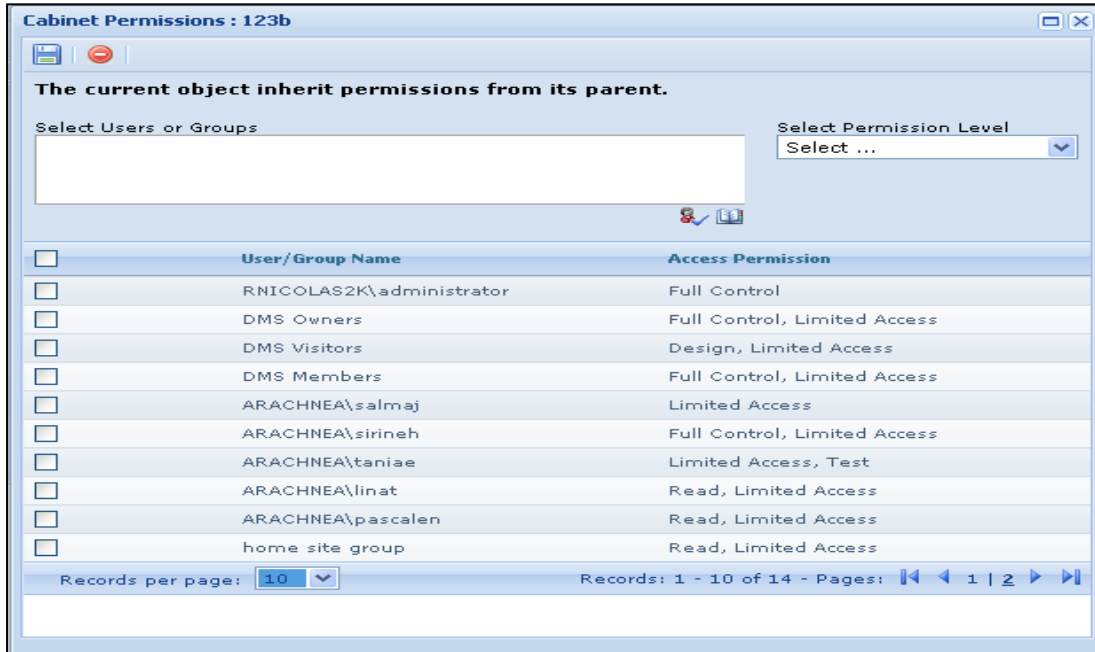
The user is requested to type a name to find, select the name or names in the result list and then click Add.


### 2.5.5.2 DELETE CABINET PERMISSIONS

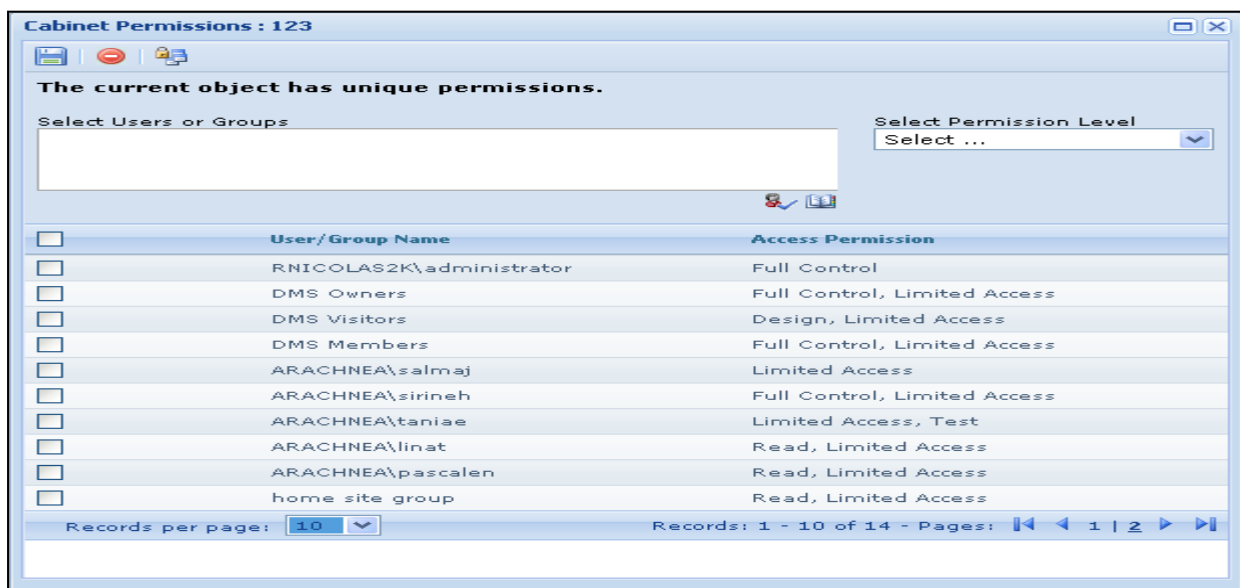
The user must select privileges from the grid then click on  button to remove assigned privileges.

### 2.5.5.3 INHERIT PERMISSION


By default, cabinets inherit permissions from their parent sites. Once the user clicks on  button, the following window will open with a message on top **“The current object inherit permissions from its parent”**

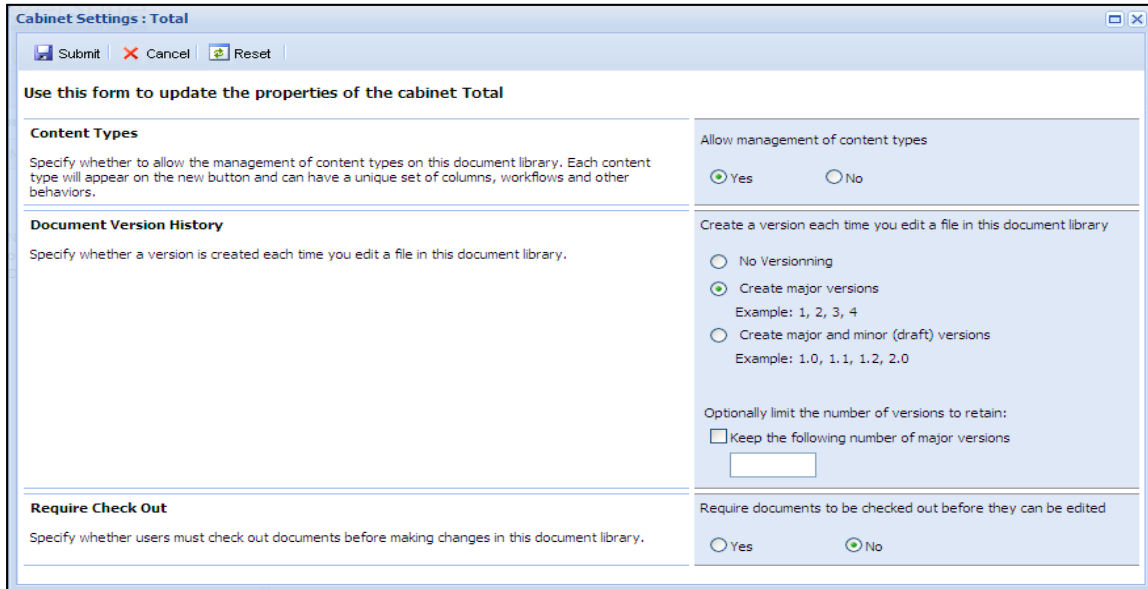


Once the user changes permission, inheritance will be broken and the permission page will show the following message **“The current object has unique permissions”** and the Inherit Permissions button  to restore inheritance.



## 2.5.6 CABINET SETTINGS

To manage cabinet settings, the user must choose a cabinet from the tree in the navigation pane then click the **Settings** button  **Settings** in the cabinet menu and the following page will open.



The screenshot shows a web browser window titled "Cabinet Settings : Total". At the top, there are buttons for "Submit", "Cancel", and "Reset". Below the buttons is a heading: "Use this form to update the properties of the cabinet Total". The form is divided into three sections:

- Content Types**: "Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors." The right side has a heading "Allow management of content types" with radio buttons for "Yes" (selected) and "No".
- Document Version History**: "Specify whether a version is created each time you edit a file in this document library." The right side has a heading "Create a version each time you edit a file in this document library" with three radio button options: "No Versioning", "Create major versions" (selected, with example "1, 2, 3, 4"), and "Create major and minor (draft) versions" (with example "1.0, 1.1, 1.2, 2.0"). Below this is an option "Optionally limit the number of versions to retain:" with a checkbox "Keep the following number of major versions" and an empty input field.
- Require Check Out**: "Specify whether users must check out documents before making changes in this document library." The right side has a heading "Require documents to be checked out before they can be edited" with radio buttons for "Yes" and "No" (selected).

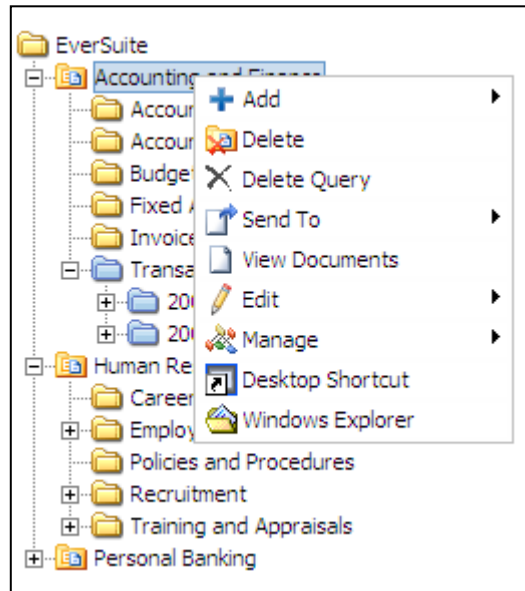
The user will be able to manage the cabinet settings already created filled in **Add Cabinet** window.



## 2.5.7 CABINET CONTEXT MENU

Some of the top navigation menu operations mentioned above is also available in the context menu of the relevant node(s).

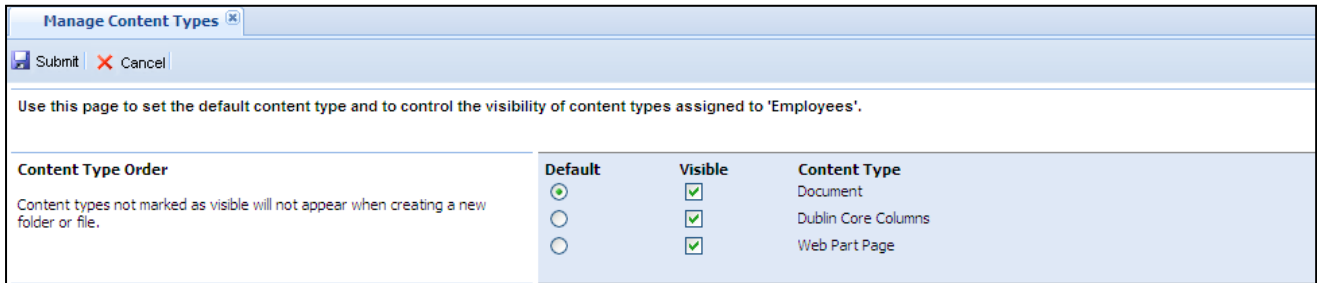
Right click on a Cabinet to view the Context Menu.



- Click **Add→Folder** to add a new folder to the selected Cabinet.
- Click **Add→ Pattern** to add the selected pattern under the selected cabinet. (For more information refer to [section 2.12.1 Pattern](#))
- Click **Add→ Structure** to add a new structure to the selected Cabinet. (Refer to [section 2.5.7.2 Add Structure](#))
- Click **Delete** to delete the selected Cabinet.
- Click **Delete Query** to delete the query (created by the administrator).
- Click **Send To→Paste** to paste a cut or copied Folder into the selected Cabinet (described later in the manual).
- Click **Send To→Paste Shortcut** to create a shortcut of a copied Folder into the selected Cabinet (described later in the manual).
- Click **View Documents** to view the selected Cabinet's documents.
- Click **Edit→Navigation Form** to navigate through the correspondent Cabinet documents. (For more information refer to [section 2.5.7.3 Cabinet Navigation Form](#))
- Click **Edit→Rename** to change the name of the selected Cabinet.
- Click **Manage→Permissions** to manage the cabinet permissions. (Already explained in [section 2.5.5 Cabinet Permissions](#))
- Click **Manage→Settings** to manage the cabinet settings. (Already explained in [section 2.5.6 Cabinet Settings](#))
- Click **Manage→Content Types** to manage the cabinet content types. (For more information refer to [section 2.5.7.1 Manage Content type](#))
- Click **Desktop Shortcut** to create a shortcut of the selected cabinet on the desktop.
- Click **Window Explorer** to open the selected cabinet in windows explorer view.

### 2.5.7.1 MANAGE CONTENT TYPES

Manage Content Types appears only for users with specific permissions allowing them to update content types. It allows the user to set the default content type and to control the visibility of content types as shown below.



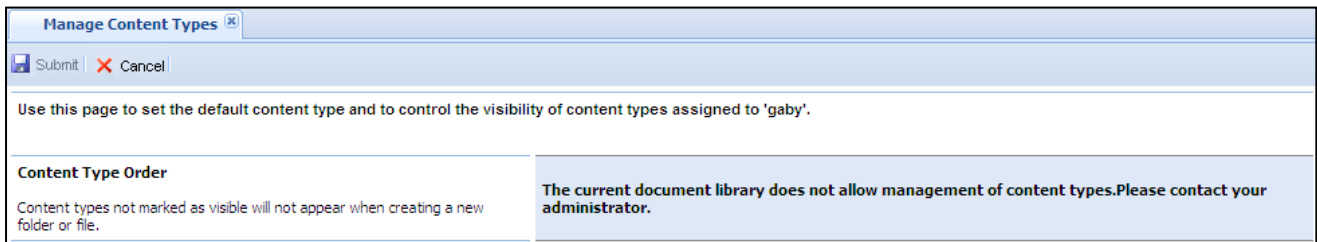
**Manage Content Types** [X]

Submit [X] Cancel

Use this page to set the default content type and to control the visibility of content types assigned to 'Employees'.

Content Type Order	Default	Visible	Content Type
Content types not marked as visible will not appear when creating a new folder or file.	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Document
	<input type="radio"/>	<input checked="" type="checkbox"/>	Dublin Core Columns
	<input type="radio"/>	<input checked="" type="checkbox"/>	Web Part Page

In case a document library does not allow management of content types, the following page will open asking the user to contact the system administrator.



**Manage Content Types** [X]

Submit [X] Cancel

Use this page to set the default content type and to control the visibility of content types assigned to 'gaby'.

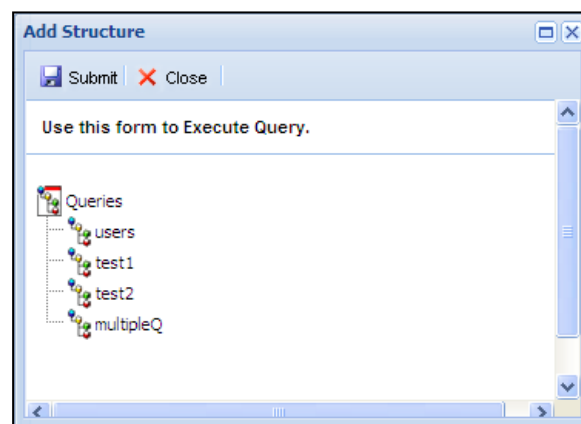
**Content Type Order**

Content types not marked as visible will not appear when creating a new folder or file.

**The current document library does not allow management of content types. Please contact your administrator.**

### 2.5.7.2 ADD STRUCTURE

Add Structure opens the following page allowing the user to add a new structure.

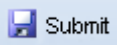


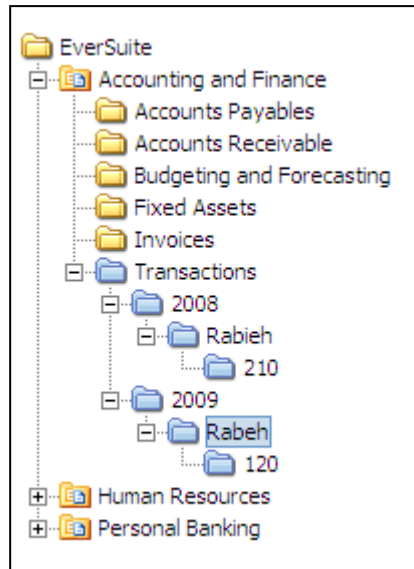
**Add Structure** [X]

Submit [X] Close

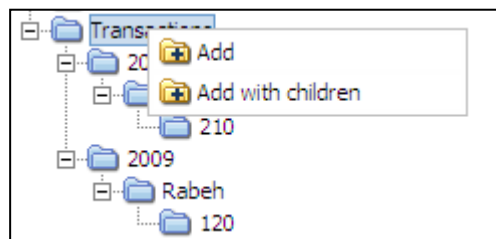
Use this form to Execute Query.

- Queries
  - users
  - test1
  - test2
  - multipleQ

The user selects a query (already created by the administrator) then click on Submit button  to execute the query. A new structure will be added according to the selected query as shown in the figure below.



To add the structure folders to the tree as SharePoint folders, right click a folder, the following menu will appear.

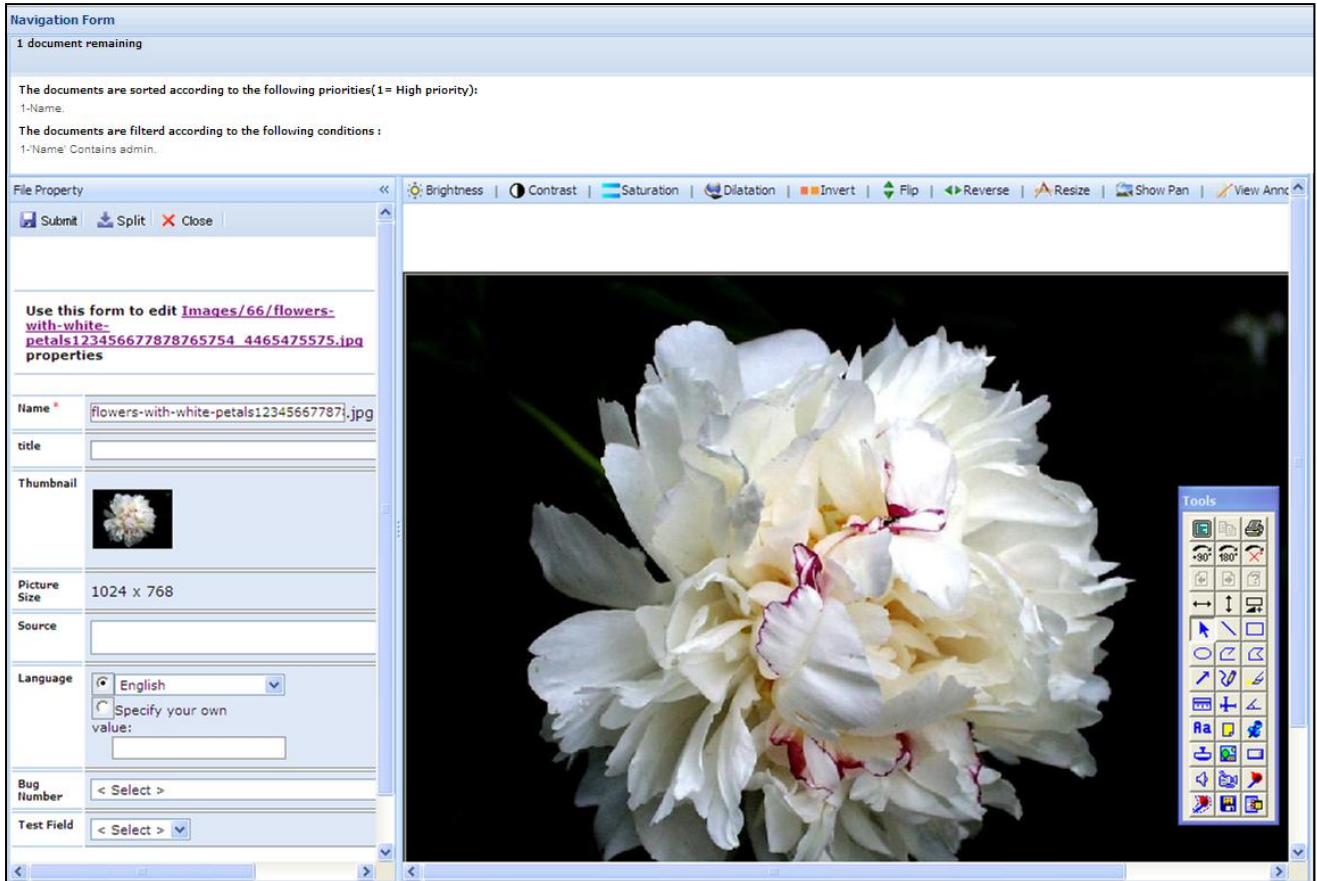


- Clicking on **Add** will add the selected folder with its parent.
- Clicking on **Add with children** will add the selected folder with its parent and its children.

**N.B:** If the structure is added to the root node, its parent node will be a cabinet.  
 If it is added to a cabinet, its parent node will be a folder.  
 If it is added to a folder, its parent node will be a folder.

### 2.5.7.3 CABINET NAVIGATION FORM


Navigation Form allows the user to navigate throughout the correspondent Cabinet's documents according to conditions and priorities predefined by the administrator in the **Configuration** tab of the **Administration** menu. The restrictions of this configuration appear on top of the Navigation Form. Users can perform general functionalities in Navigation Form such as viewing Images, PDF Files, etc... and updating the correspondent file properties.





The Navigation Form will display the Documents to the user(s) based on the following criteria:

- File is not checked out by any user
- File is checked out by the currently logged in user
- File matches the filter(s) applied by the Administrator
- File is on top of the Priority list

Once the user opens a File through the Navigation Form the file will be automatically Checked-out to the correspondent user. After either submitting the changes or closing the Navigation Form, the file will be released from the user via a Check in or a Discard Check Out.

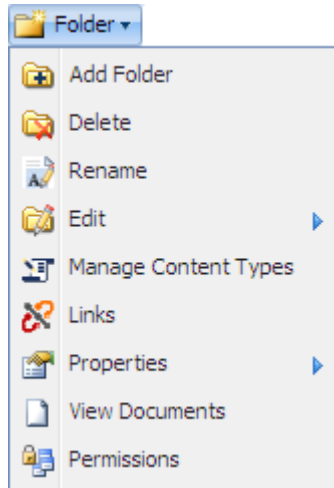
The split button  allows the user to create copies of the displayed document in the selected cabinet. The created documents will be checked out by the logged in user.

The number of copies will be indicated in the following field **Please enter the number of copies**    which appears once the split button is clicked.

The first copy of a document is «\_ 1 », and then it is increased by one.

## 2.6 FOLDER

The menu “Folder” visible in the user Top Navigation Menu allows the user to manage folders.

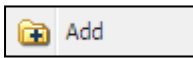


This menu is divided into the following sub-menus:

- **Add Folder:** to add a new folder.
- **Delete:** Delete the selected Folders.
- **Rename:** Rename the selected Folders.
- **Edit:** Edit operation on the selected folder including.
  - Cut
  - Copy
  - Paste
  - Paste Shortcut
- **Manage Content Types** to manage the folder content types.
- **Links:** view folders linked to the selected folder
- **Properties:** View or Edit the selected Folder’s Properties.
- **View Documents:** Display the selected Folder’s documents.
- **Permissions:** Manage Users permissions on the selected Folder.

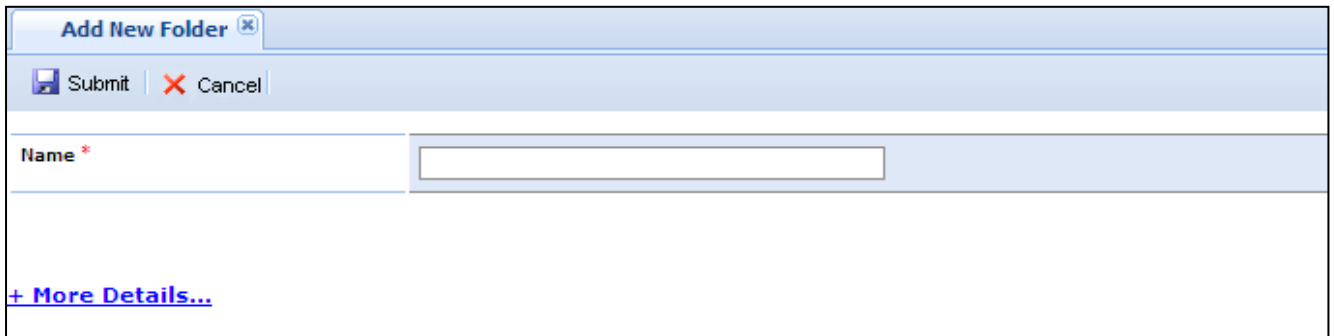
## 2.6.1 ADDING FOLDERS

To add a new Folder, the user selects a folder or a cabinet from the tree then click on **“Add”** button

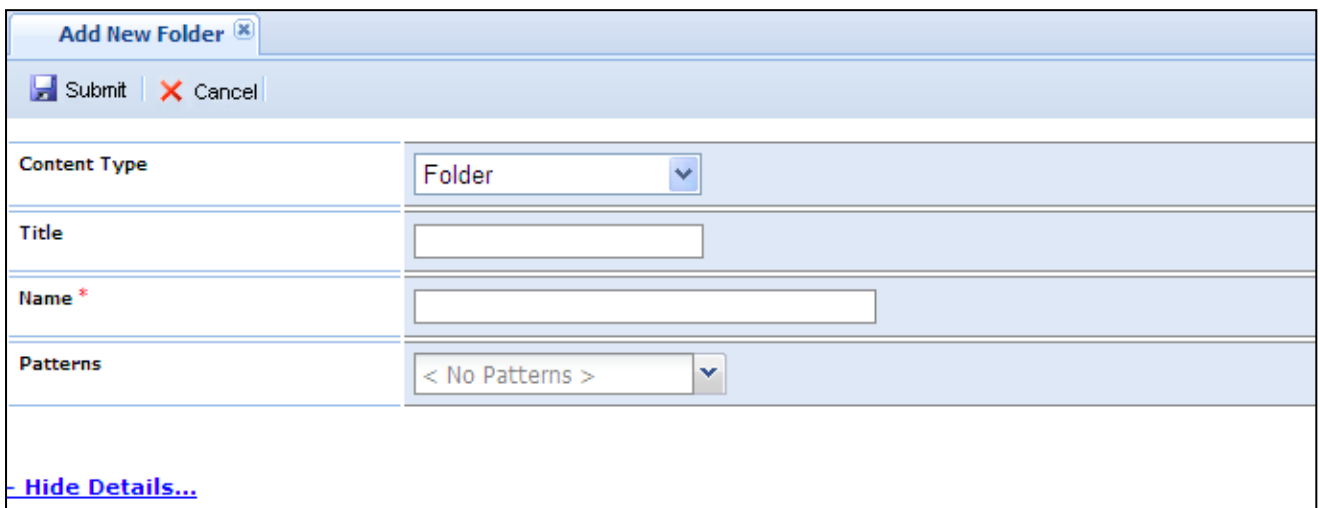


in the folder top navigation menu or in the folder or cabinet right click menu.

The user will be presented with a new window asking for the folder name as shown below.



Once the user clicks on the link [+ More Details...](#), the link will expand asking for details about the new added folder as shown below.



Folder content type will appear by default. The user may select another content type from the drop down list. Only content types set as visible will be shown in the drop down list.

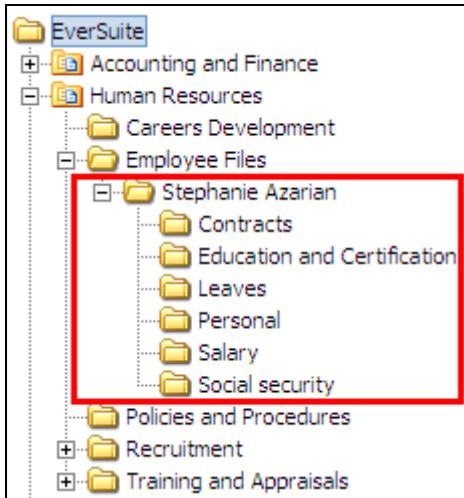
The user may select a pattern (optional). The following grid will appear in the lower part of the page. The selected pattern is already created by the administrator (for more information refer to Add new pattern in ES-DMS administrator guide)

Folder
Contracts
Education and Certification
Leaves
Personal
Salary
Social Security

Records per page: 10 Show Filter - Records: 1 - 6 of 6 - Pages: 1

Once all mandatory fields are filled click on  **Submit** button.

The new folder and its subfolders will appear in the Navigation Pane according to the selected pattern.



## 2.6.2 DELETING FOLDERS

The user must choose a folder from the tree in the navigation pane then press the **Delete** button



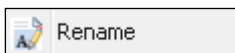
in the folder menu. The folder will be deleted after a confirmation message.

Deleting a Folder will result in deleting all its content, Subfolders and Documents.

A deleted Folder is sent to the recycle bin; administrators can either restore or delete the Folder permanently.

## 2.6.3 RENAMING FOLDERS

The user must choose a folder from the tree in the navigation pane then press the **Rename** button



in the folder menu to rename the selected folder.

## 2.6.4 MANAGE CONTENT TYPES

Manage Content Types appears only for users with specific permissions allowing them to update content types. It allows the user to set the default content type and to control the visibility of content types as shown below.

**Manage Content Types** [X]

Submit [X] Cancel

Use this page to control the visibility of content types assigned to 'Employees/RNI'.  
This folder inherits visibility settings from its parent folder.

Content Type Order	Default	Visible	Content Type
Content types not marked as visible will not appear when creating a new folder or file.	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Document
	<input type="radio"/>	<input checked="" type="checkbox"/>	Dublin Core Columns
	<input type="radio"/>	<input checked="" type="checkbox"/>	Web Part Page

By default, folders inherit visibility settings from their parent folder as appears in the message on top **“This folder inherits visibility from its parent folder”**.

Once the user changes content type settings, inheritance will be broken, and manage content types page will show the following message **“This folder has unique visibility settings”** and the [Inherit Settings](#) link to restore inheritance.

**Manage Content Types** [X]

Submit [X] Cancel

Use this page to control the visibility of content types assigned to 'Employees/RNI'.  
This folder has unique visibility settings. [Inherit Settings](#).

Content Type Order	Default	Visible	Content Type
Content types not marked as visible will not appear when creating a new folder or file.	<input checked="" type="radio"/>	<input checked="" type="checkbox"/>	Document
	<input type="radio"/>	<input type="checkbox"/>	Dublin Core Columns
	<input type="radio"/>	<input checked="" type="checkbox"/>	Web Part Page

In case the parent document library does not allow management of content types, the following page will open asking the user to contact the system administrator to manage content types.

**Manage Content Types** [X]

Submit [X] Cancel

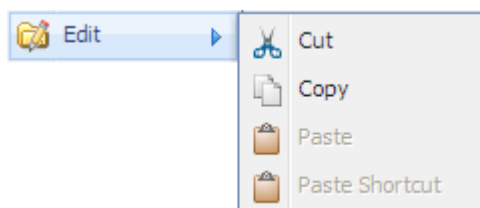
Use this page to control the visibility of content types assigned to 'gaby/gaby1'.  
This folder inherits visibility settings from its parent folder.

Content Type Order	Default	Visible	Content Type
Content types not marked as visible will not appear when creating a new folder or file.			

The parent document library does not allow management of content types. Please contact your administrator.

## 2.6.5 EDIT OPERATIONS

The section **“Edit”** visible in Folder menu provides sub-sections allowing the user to cut/copy/paste/paste shortcut of a selected folder.





### 2.6.5.1 CUT, COPY AND PASTE

To cut or copy a folder, the user must select follow the following steps:

- Select a folder from the tree in the navigation pane
- Click on Edit button in the folder menu
- Select Cut to cut the selected Folder, or Copy to make a copy
- Select the destination Folder or Cabinet in the navigation pane
- Click on Paste

Cut or Copied Folders will be added under the destination Folder or Cabinet.

If the operation was “**Cut**”, the Folder will be deleted from its original location.

If the operation was “**Copy**”, the Folder will remain in its original location.

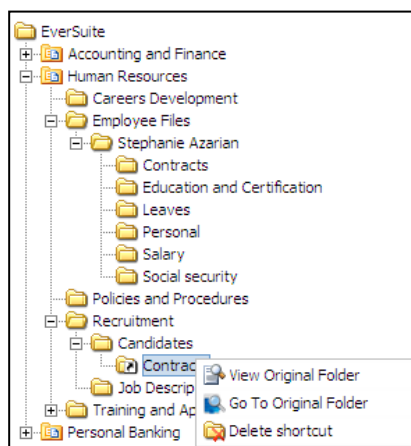
### 2.6.5.2 COPY AND PASTE SHORTCUT

To copy a folder, the user must choose a folder from the tree in the navigation pane then press **Edit** → **Copy** in the folder menu.

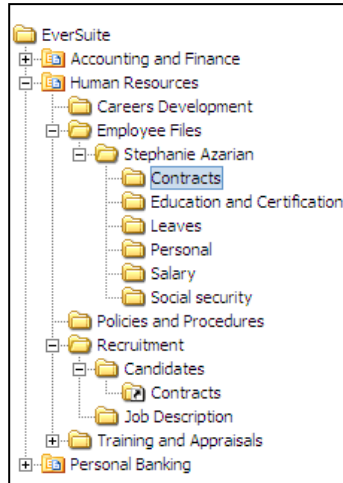
The user is prompted to select the destination Folder or Cabinet in the navigation pane and click on **Paste Shortcut** from the Folder menu **Edit**.


A shortcut of the copied Folders will be added under the destination Folder or Cabinet.


To find the original folder of a shortcut folder, the user right-clicks a shortcut folder then clicks on **Go To Original Folder**.



The original Folder will be selected as shown below:






The user can also view the Original Folder by clicking on  **View Original Folder** . The properties of the original folder will open.

To delete the shortcut the user must click on  **Delete shortcut** .


## 2.6.6 LINKS


To view the folders linked to the selected folder, the user must select a folder then click on Links and the following page will open.

+ Add   X Delete   X Cancel		
Displaying links of 'Folder 2'		
Drag a column header here to group by that column.		
<input type="checkbox"/>	Url	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1/F1-1">http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1/F1-1</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/JI CABINET TEST/123456">http://std:29327/sites/Total/Ji Subsite/JI CABINET TEST/123456</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/ZZZZ JENNY TEST/FolderTest1">http://std:29327/sites/Total/Ji Subsite/ZZZZ JENNY TEST/FolderTest1</a>	

Records per page: 10 | Records: 1 - 3 of 3 - Pages: 1

The Links grid shows a list of folders linked to the selected folder.

View Links button  will display the folders linked to the correspondent folder allowing the user to add new links.

To add a new link the user must click on  **Add** button. The **Add Links** frame will open in the bottom of the page allowing the user to search for folders to be linked to the selected folder.

+ Add | X Delete | X Cancel

Displaying links of 'Folder 2'

Drag a column header here to group by that column.

<input type="checkbox"/>	Url	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1/F1-1">http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1/F1-1</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/JI CABINET TEST/123456">http://std:29327/sites/Total/Ji Subsite/JI CABINET TEST/123456</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/ZZZZ JENNY TEST/FolderTest1">http://std:29327/sites/Total/Ji Subsite/ZZZZ JENNY TEST/FolderTest1</a>	

Records per page: 10 | Records: 1 - 3 of 3 - Pages: << 1 >>

---

Add Links

Search | Reset | Submit

Please enter your search criteria and click 'search'.

Search Criteria:

The user must enter search criteria then click on **Search** button. The search results will appear as follows.

+ Add | X Delete | X Cancel

Displaying links of 'Folder 2'

Drag a column header here to group by that column.

<input type="checkbox"/>	Url	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1/F1-1">http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1/F1-1</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/JI CABINET TEST/123456">http://std:29327/sites/Total/Ji Subsite/JI CABINET TEST/123456</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/ZZZZ JENNY TEST/FolderTest1">http://std:29327/sites/Total/Ji Subsite/ZZZZ JENNY TEST/FolderTest1</a>	

Records per page: 10 | Records: 1 - 3 of 3 - Pages: << 1 >>

---

Add Links

Search | Reset | Submit

Please enter your search criteria and click 'search'.

Search Criteria:

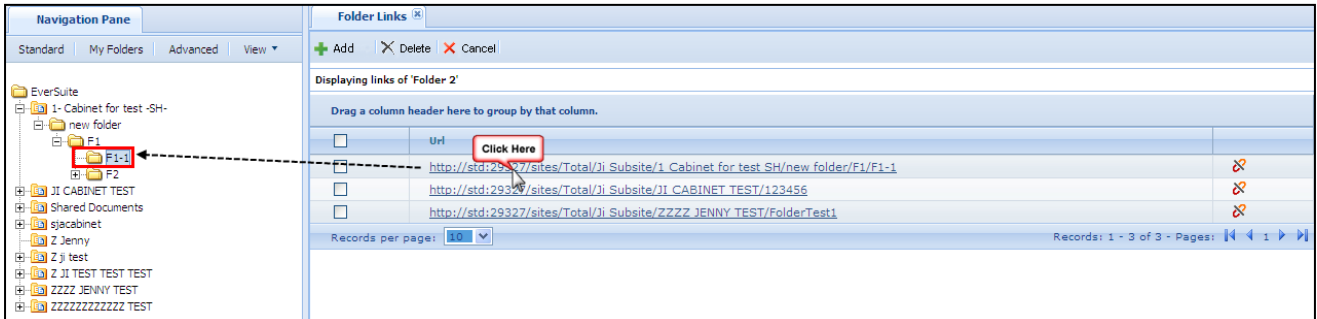
Drag a column header here to group by that column.


<input type="checkbox"/>	Url	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1">http://std:29327/sites/Total/Ji Subsite/1 Cabinet for test SH/new folder/F1</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/Shared Documents/222/F1">http://std:29327/sites/Total/Ji Subsite/Shared Documents/222/F1</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/Shared Documents/222/F1/F1-1">http://std:29327/sites/Total/Ji Subsite/Shared Documents/222/F1/F1-1</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/sja subsite/Folder 2/folder 2.1">http://std:29327/sites/Total/Ji Subsite/sja subsite/Folder 2/folder 2.1</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/sja subsite/folder 3/folder31">http://std:29327/sites/Total/Ji Subsite/sja subsite/folder 3/folder31</a>	
<input type="checkbox"/>	<a href="http://std:29327/sites/Total/Ji Subsite/sja subsite/folder 3/folder31/flid '1">http://std:29327/sites/Total/Ji Subsite/sja subsite/folder 3/folder31/flid '1</a>	

**N.B:** only folders having the same content type as the selected folder will appear in search results.

The user must select the folder(s) to be linked then click on **Submit** button.

Once the user clicks on any link, the tree will expand and the correspondent folder will be selected as shown below.



To remove a document link, the user must select a link then click on  button.

## 2.6.7 FOLDER PROPERTIES

The section **“Properties”** visible in Folder menu provides sub-sections allowing the user to view/edit the properties of a selected folder.



### 2.6.7.1 VIEWING

In this section, the user can view the properties of the selected folder.

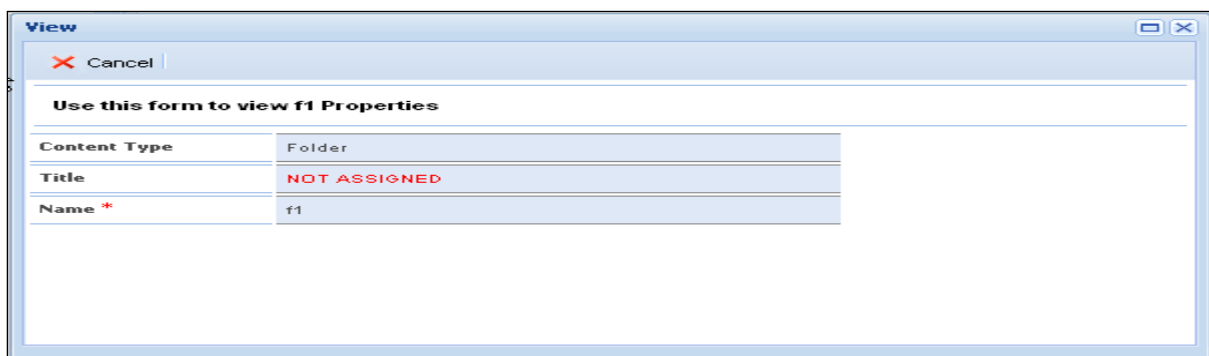
The user must choose a folder from the tree in the navigation pane then press the **View** button



in the Folder **Properties** menu.

The page will display the properties of the selected Folder in read only mode.

The user can only view the properties but he cannot edit them.



Upon clicking **“Cancel”** button, the properties page closes.

### 2.6.7.2 EDITING

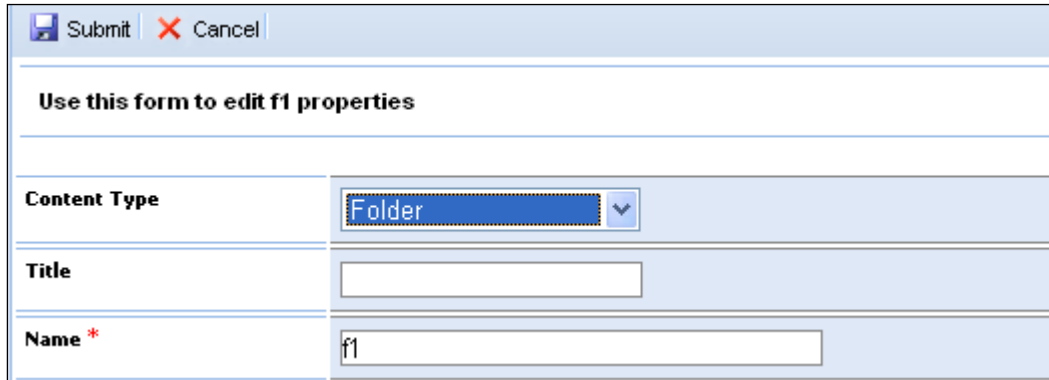
In this section, the user can edit the properties of the selected folder.

The user must choose a folder from the tree in the navigation pane then press the **Edit** button



in the Folder Properties menu.

The page will display the properties of the selected Folder in edit mode.



Submit Cancel

Use this form to edit f1 properties

Content Type: Folder

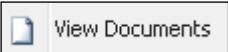
Title:

Name \*: f1

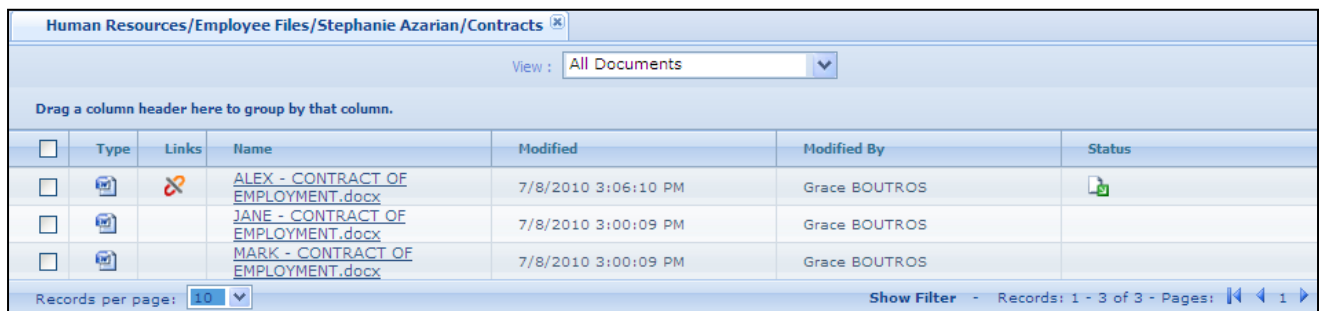
The user must add the necessary changes then click on **“Submit”** button, to save the changes.

### 2.6.8 VIEWING FOLDERS’ DOCUMENTS

To view the documents of a selected folder, the user must simply double click on the folder name or choose a

Folder from the tree in the navigation pane then press the **View Documents** button  in the folder menu.

The selected Folder’s document tab will appear.



Human Resources/Employee Files/Stephanie Azarian/Contracts						
View : All Documents						
Drag a column header here to group by that column.						
<input type="checkbox"/>	Type	Links	Name	Modified	Modified By	Status
<input type="checkbox"/>			ALEX - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:06:10 PM	Grace BOUTROS	
<input type="checkbox"/>			JANE - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
<input type="checkbox"/>			MARK - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	


Records per page: 10 Show Filter - Records: 1 - 3 of 3 - Pages: 1

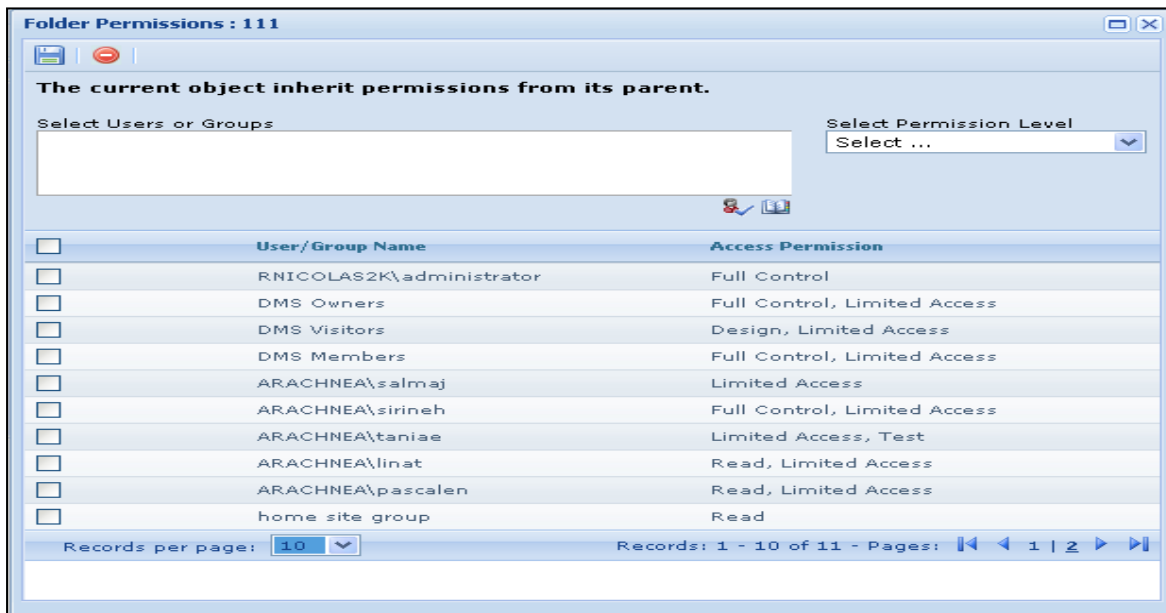
## 2.6.9 FOLDER PERMISSIONS

The section “**Permissions**” visible in Folder menu provides sub-sections allowing the user to add/edit/delete permissions of a selected folder.

### 2.6.9.1 ADDING PERMISSION

To add a folder permission the user select a Folder from the tree in the navigation pane then press the

**Permissions** button  **Permissions** in the folder menu and the following page will open.



**Folder Permissions : 111**


The current object inherit permissions from its parent.


Select Users or Groups:

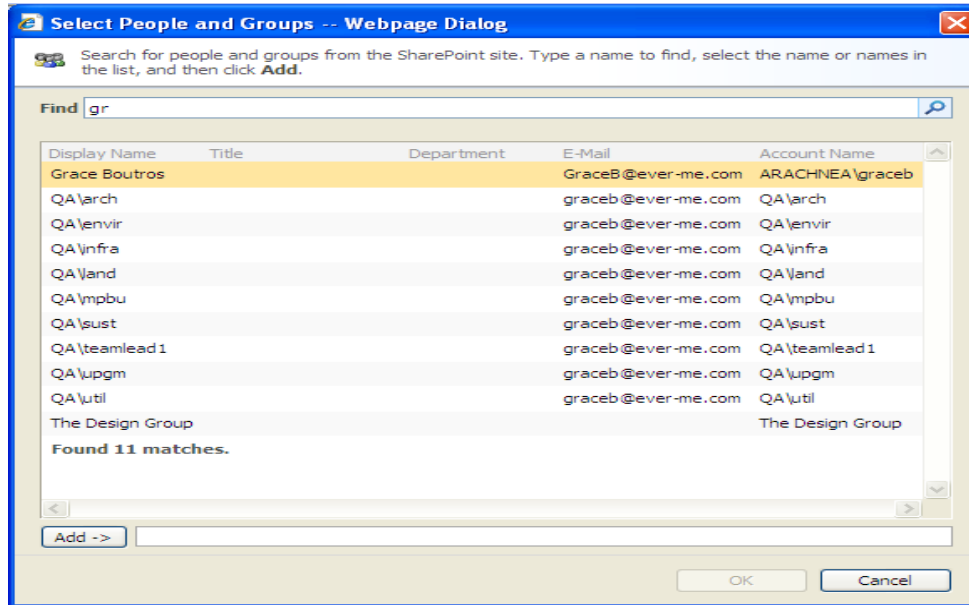
Select Permission Level:

<input type="checkbox"/>	User/Group Name	Access Permission
<input type="checkbox"/>	RNICOLAS2K\administrator	Full Control
<input type="checkbox"/>	DMS Owners	Full Control, Limited Access
<input type="checkbox"/>	DMS Visitors	Design, Limited Access
<input type="checkbox"/>	DMS Members	Full Control, Limited Access
<input type="checkbox"/>	ARACHNEA\salmaj	Limited Access
<input type="checkbox"/>	ARACHNEA\sirineh	Full Control, Limited Access
<input type="checkbox"/>	ARACHNEA\taniae	Limited Access, Test
<input type="checkbox"/>	ARACHNEA\linat	Read, Limited Access
<input type="checkbox"/>	ARACHNEA\pascalien	Read, Limited Access
<input type="checkbox"/>	home site group	Read

Records per page:  Records: 1 - 10 of 11 - Pages:  |

The user must select users or groups, select Permission level and then click on  button to save the assigned privileges.

He can enter the users or groups to which he wants to give permission or search for people or groups from the SharePoint site by clicking on browse  button. The following page will open.



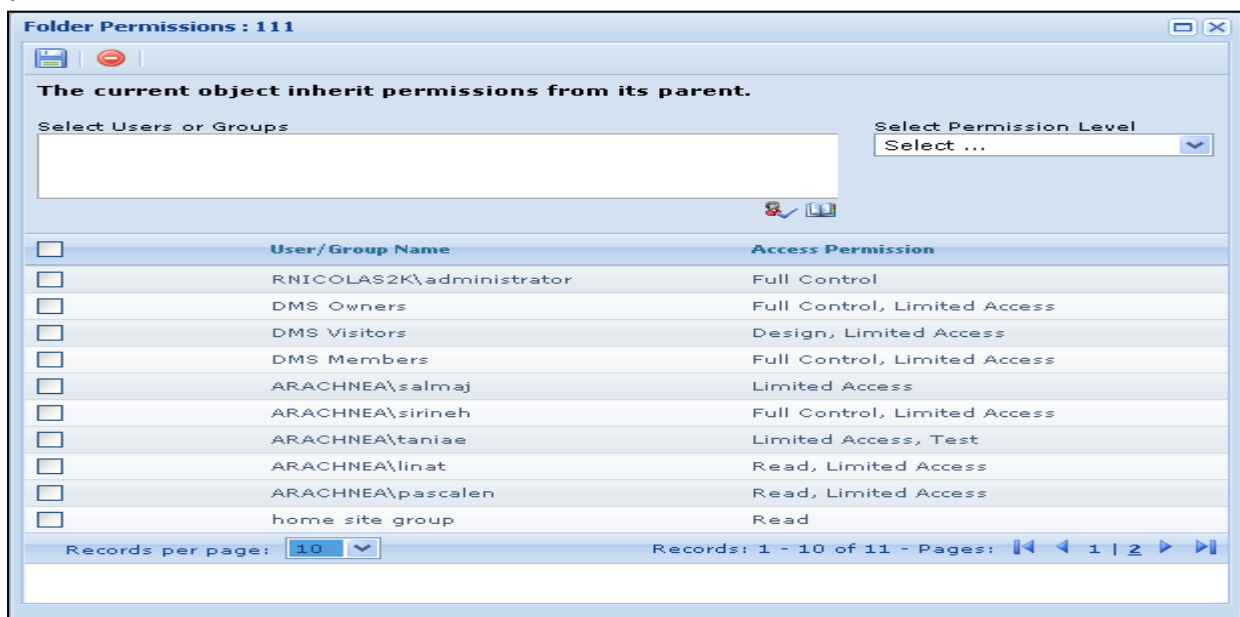
The user is requested to type a name to find, select the name or names in the result list and then click Add.

### 2.6.9.2 DELETE FOLDER PERMISSION

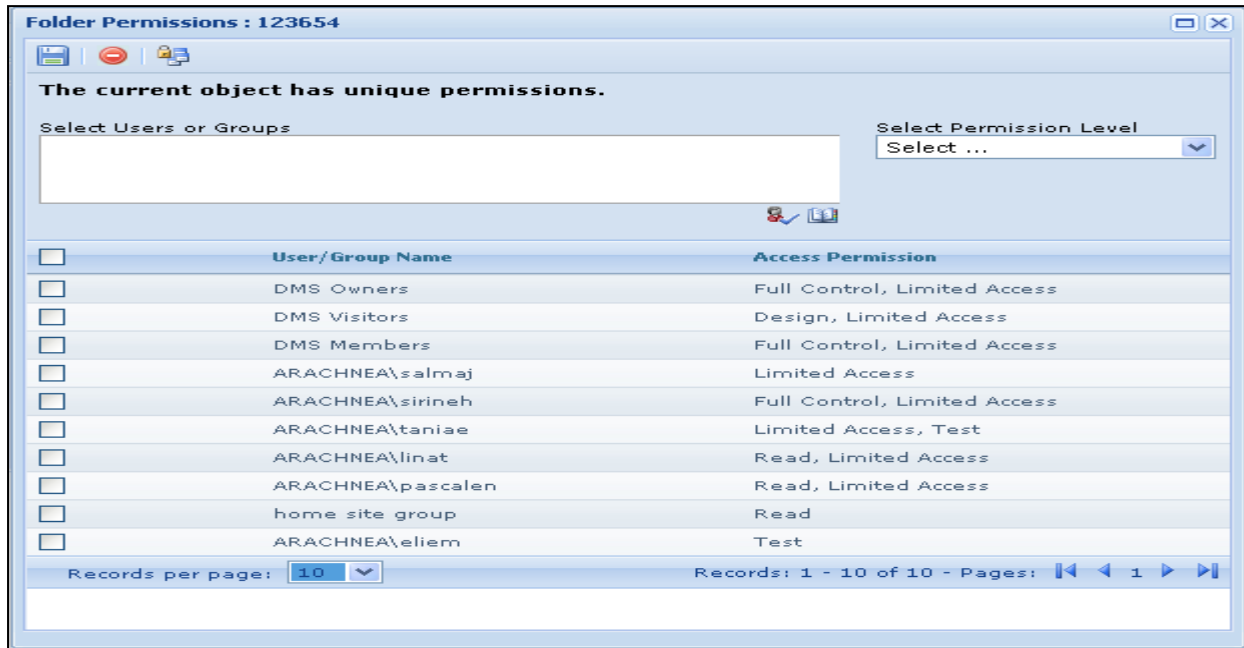
The user must select privileges from the grid then click on button to remove assigned privileges.

### 2.6.9.3 INHERIT PERMISSION

By default, folders inherit permissions from their parent cabinets. Once the user clicks on button, the following window will open with a message on top **“The current object inherit permissions from its parent”**



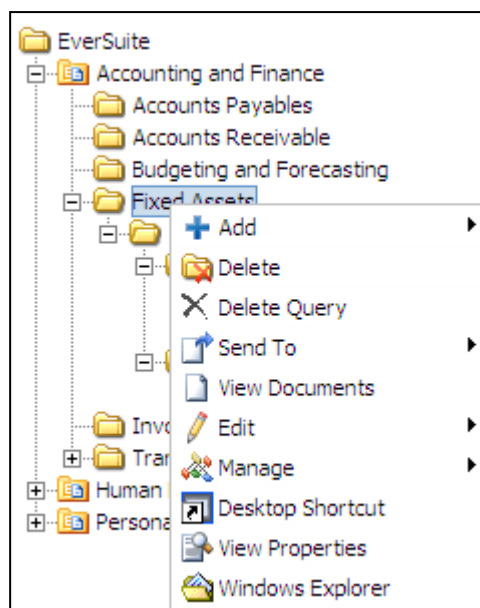
Once the user changes permission, inheritance will be broken, and the permission page will show the following message **“The current object has unique permissions”** and the Inherit Permissions button to restore inheritance.



## 2.6.10 FOLDER CONTEXT MENU

Some of the top navigation menu operations mentioned above is available in the context menu of the relevant node(s).

Right click the Folder to view the Context Menu.



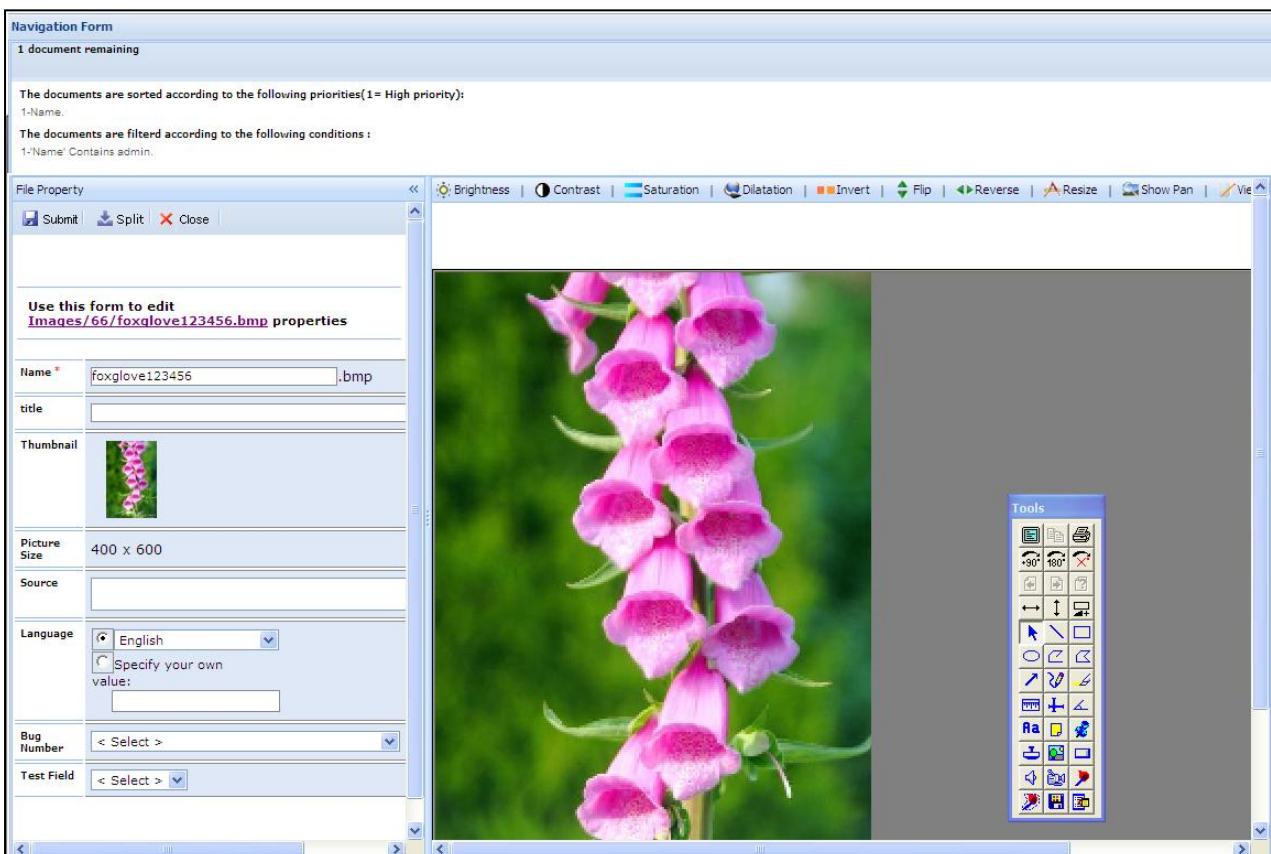
- Click **Add→Folder** to add a new Subfolder.
- Click **Add→Pattern** to add the selected pattern under the selected folder. (For more information refer to [section 2.12.1 Pattern](#))
- Click **Add→Structure** to add a new structure to the selected folder. (Refer to [section 2.5.7.2 Add Structure](#))
- Click **Delete** to delete the selected Folder.
- Click **Delete Query** to delete the query (created by the administrator)
- Click **Send To→Cut** to cut the selected Folder.



- Click **Send To→Copy** to copy the selected Folder.
- Click **Send To→Paste** to paste a cut or copied Folder into the selected Folder.
- Click **Send To→Paste Shortcut** to create a shortcut of a copied Folder into the selected Folder.
- Click **View Documents** to view the selected Folder’s documents.
- Click **Edit→Properties** to edit the properties of the selected folder.
- Click **Edit→Navigation Form** to navigate through the correspondent folder.
- Click **Edit→Rename** to change the name of the selected Folder.
- Click **Manage→Permissions** to manage the folder permissions. (Already explained in [section 2.5.5 Folder Permissions](#))
- Click **Manage→Content Types** to manage content types. This part is already explained in section [2.6.4 Manage Content Types](#).
- Click **Manage→Links** to view the folders linked to the selected folder.
- Click **Desktop Shortcut** to create a shortcut of the selected Folder on the desktop.
- View properties
- Click **Window Explorer** to open the selected folder in windows explorer view.

### 2.6.10.1 FOLDER NAVIGATION FORM


Navigation Form allows the user to navigate throughout the correspondent Folder’s documents according to conditions and priorities predefined by the administrator in the **Configuration** tab of the **Administration** menu. The restrictions of this configuration appear on top of the Navigation Form. Users can perform general functionalities in Navigation Form such as viewing Images, PDF Files, etc... and updating the correspondent file properties.





The Navigation Form will display the Documents to the user(s) based on the following criteria:

- File is not checked out by any user
- File is checked out by the currently logged in user
- File matches the filter(s) applied by the Administrator
- File is on top of the Priority list

Once the user opens a file through the Navigation Form, the file will be automatically Checked-out to the correspondent user. After either submitting the changes or closing the Navigation Form, the file will be released from the user via a Check in or a Discard Check Out.

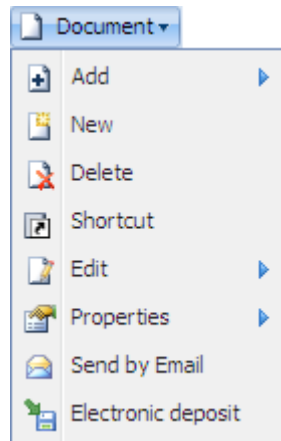
The split button  Split allows the user to create copies of the displayed document in the selected folder. The created documents will be checked out by the logged in user.

The number of copies will be indicated in the following field **Please enter the number of copies**   , which appears once the split button is clicked.

The first copy of a document is «\_ 1 », and then it is increased by one.

## 2.7 DOCUMENT MANAGEMENT

The menu “Document” visible in the user Top Navigation Menu allows the user to manage documents.



This menu is divided into the following sub-menus:

- **Add:** Upload a File or Multiple Files, or Scans Files to the selected folder.
- **New:** Create a new File, based on a pre-defined template.
- **Delete:** Delete selected documents.
- **Shortcut:** Create shortcuts of the selected documents in different containers (Folders or Cabinet).
- **Edit:** Copy or Move the selected documents to different containers (Folders or Cabinet).
- **Properties:** View/Edit properties of the selected document.
- **Send by Email:** Send the documents by Mail as a link or attachment.
- **Electronic deposit:** Add the selected document to electronic deposit.

### 2.7.1 VIEWING DOCUMENTS

The Documents and Services Frame displays a list of all the documents of a selected folder or cabinet.

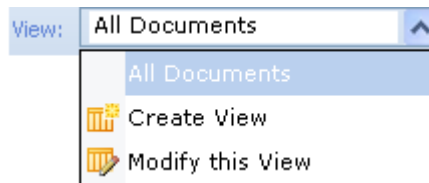
Human Resources/Employee Files/Stephanie Azarian/Contracts						
View : All Documents						
Drag a column header here to group by that column.						
<input type="checkbox"/>	Type	Links	Name	Modified	Modified By	Status
<input type="checkbox"/>			ALEX - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:06:10 PM	Grace BOUTROS	
<input type="checkbox"/>			JANE - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
<input type="checkbox"/>			MARK - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	

Records per page: 10 Show Filter - Records: 1 - 3 of 3 - Pages: 1

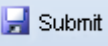
Fields Displayed in the List Including Document Type, Name, etc..., are all attributes defined in the selected view.

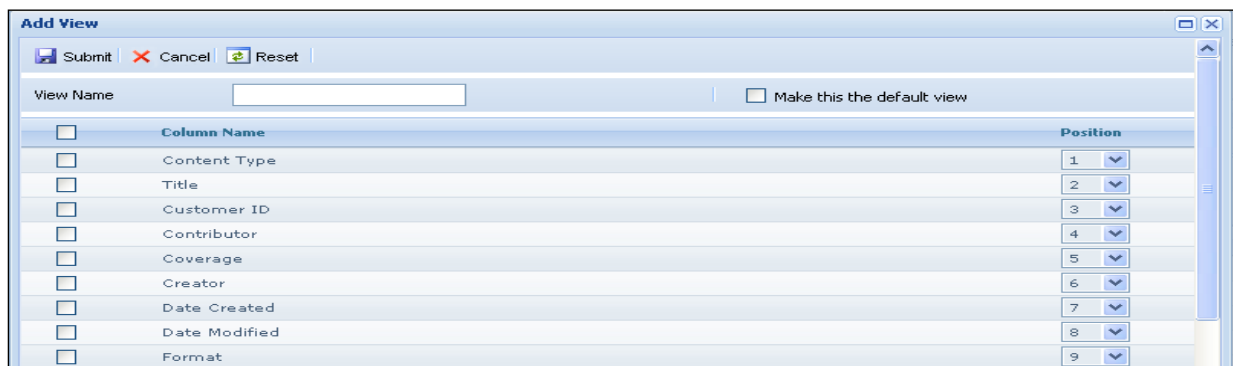
### 2.7.1.1 MANAGE VIEW LIST

The user can create a new view, select or modify an existing one.



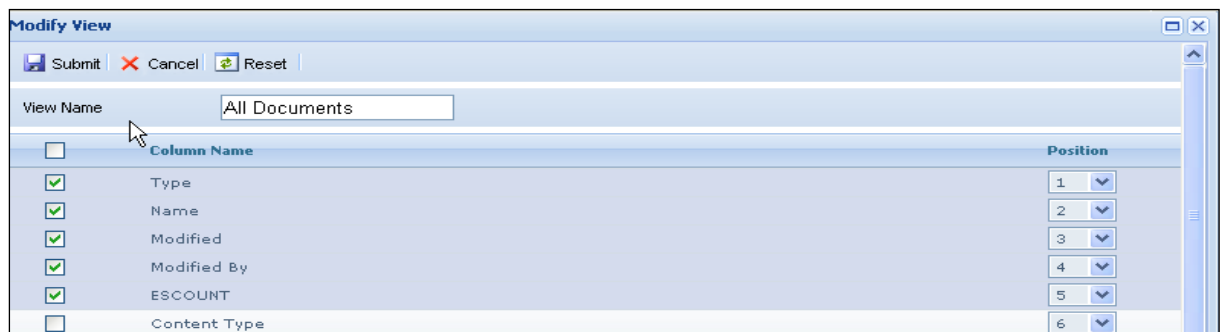
- The user selects a view from the **View** drop down list.
- A new view can be added by simply clicking on **Create View** in **View** dropdown list. A new form pops up allowing the user to enter the name of the new view, select the columns and their positions, check **“Make this the default view”** checkbox to set the new created view as default.

Upon clicking on **Submit** button  the created view will be saved.

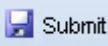


<input type="checkbox"/>	Column Name	Position
<input type="checkbox"/>	Content Type	1
<input type="checkbox"/>	Title	2
<input type="checkbox"/>	Customer ID	3
<input type="checkbox"/>	Contributor	4
<input type="checkbox"/>	Coverage	5
<input type="checkbox"/>	Creator	6
<input type="checkbox"/>	Date Created	7
<input type="checkbox"/>	Date Modified	8
<input type="checkbox"/>	Format	9

- To modify an existing view, the user simply selects the view he wants to modify, then clicks on **Modify View** from **View** dropdown list. The screen will show the same fields used to add a new view, but this time they will be filled with their existing values.



<input type="checkbox"/>	Column Name	Position
<input checked="" type="checkbox"/>	Type	1
<input checked="" type="checkbox"/>	Name	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4
<input checked="" type="checkbox"/>	ESCOUNT	5
<input type="checkbox"/>	Content Type	6

The user is prompted to click on  button to save the modifications.

### 2.7.1.2 SORTING AND GROUPING DOCUMENTS

To Group documents, the user must drag a header column and drop it where the red arrows show, to group the files by that columns.

View : All Documents

Drag a column header here to group by that column.

<input type="checkbox"/>	Type	Links	Name	Modified	Modified By	Status
<input type="checkbox"/>			ALEX - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:06:10 PM	Grace BOUTROS	
<input type="checkbox"/>			Certificate of Excellence.pptx	7/9/2010 3:01:23 PM	Grace BOUTROS	
<input type="checkbox"/>			JANE - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
<input type="checkbox"/>			MARK - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
<input type="checkbox"/>			University certificate.pdf	7/9/2010 3:01:24 PM	Grace BOUTROS	

Records per page: 10 Show Filter - Records: 1 - 5 of 5 - Pages: 1

**Ex:** Files will be grouped by name as shown below.

View : All Documents

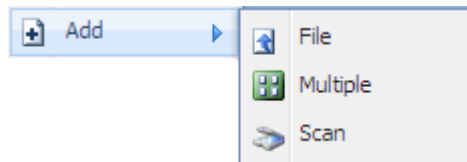
Name

<input type="checkbox"/>	Type	Links	Name	Modified	Modified By	Status
<b>Name: ALEX - CONTRACT OF EMPLOYMENT.docx</b>						
<input type="checkbox"/>			ALEX - CONTRACT OF EMPLOYM...	7/8/2010 3:06:10 PM	Grace BOUTROS	
<b>Name: Certificate of Excellence.pptx</b>						
<input type="checkbox"/>			Certificate of Excellence.pptx	7/9/2010 3:01:23 PM	Grace BOUTROS	
<b>Name: JANE - CONTRACT OF EMPLOYMENT.docx</b>						
<input type="checkbox"/>			JANE - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
<b>Name: MARK - CONTRACT OF EMPLOYMENT.docx</b>						
<input type="checkbox"/>			MARK - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
<b>Name: University certificate.pdf</b>						
<input type="checkbox"/>			University certificate.pdf	7/9/2010 3:01:24 PM	Grace BOUTROS	

Records per page: 10 Show Filter - Records: 1 - 5 of 5 - Pages: 1

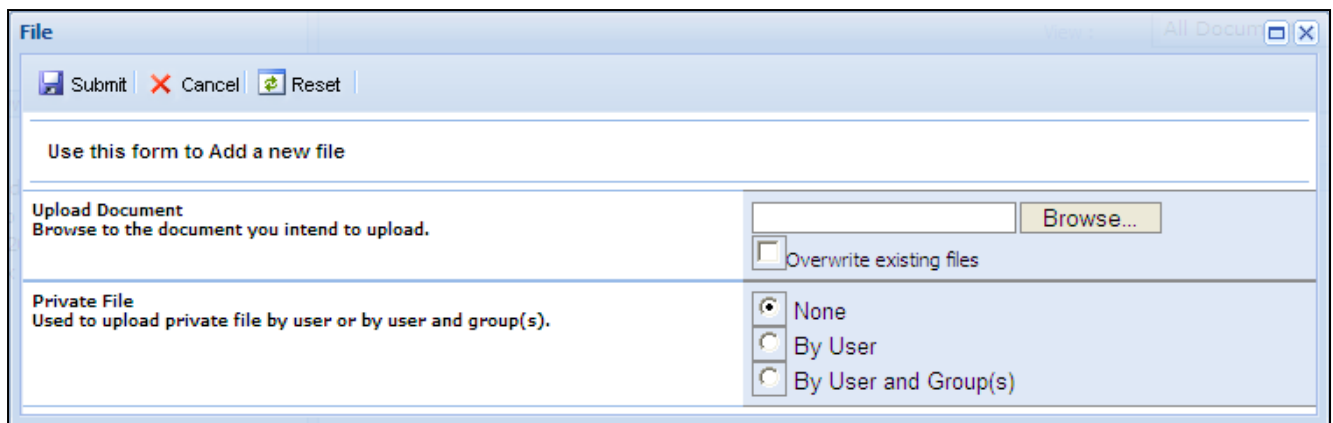
## 2.7.2 ADDING DOCUMENTS

The section "**Add**" visible in Document menu provides sub-sections allowing the user to add one or multiple documents or to scan documents.



### 2.7.2.1 ADDING FILE

To add a new file, the user must select a folder or a cabinet from the tree in the navigation pane, then click on **Add → File** in the document menu, and the following page will open. The user will be presented with a new form asking for details about the new file as shown below.



The user must browse for the document then click submit .

- If the parent Cabinet or Folder allows versioning, users cannot overwrite existing Files; they can only choose to upload a new version of the document.

Add as a new version to existing files

- If the parent Cabinet or Folder does not allow versioning, users can choose to overwrite existing File.

Overwrite existing files

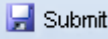
- If a File with the same name exists in the Folder and the overwrite option is not checked, then an error message will be displayed.

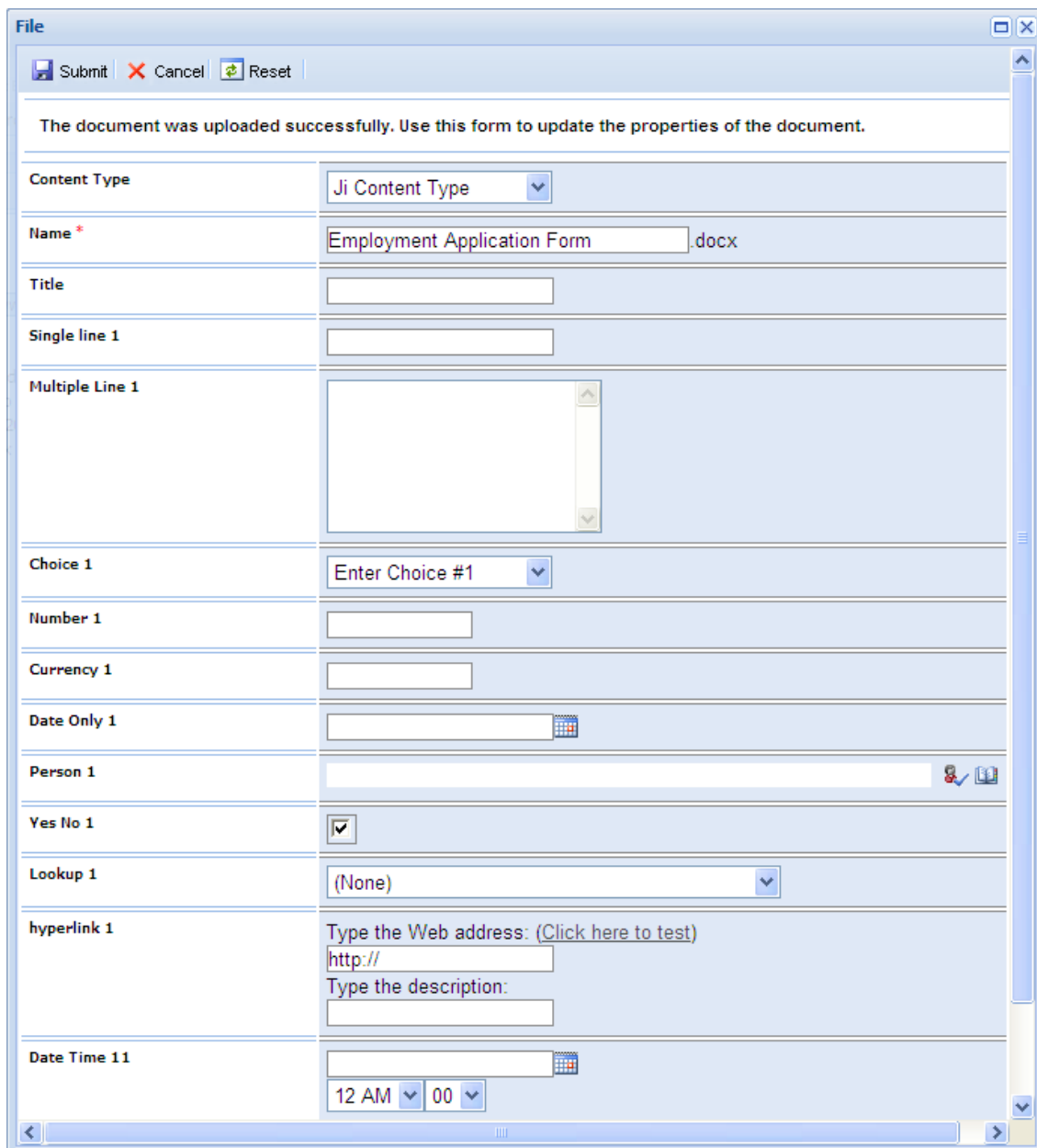
**The file you are trying to upload already exists.**

In Private File section, the user must specify whether he wants to upload a private file by user or by user and group.

- None: the file will be viewed by all users and groups
- By user: only the logged in user will be able to view this file
- By User and Group(s): only users belonging to the same group of the logged in user will be able to view this file

Once the Document is added, the property window will be displayed to the User to fill in the attributes (properties) of the document.

The user is first prompted to select a content type, and then click on  button. Notice how the document properties are filtered according to the content type selected.



The screenshot shows a window titled "File" with a toolbar containing "Submit", "Cancel", and "Reset" buttons. Below the toolbar is a message: "The document was uploaded successfully. Use this form to update the properties of the document." The form contains several property fields:

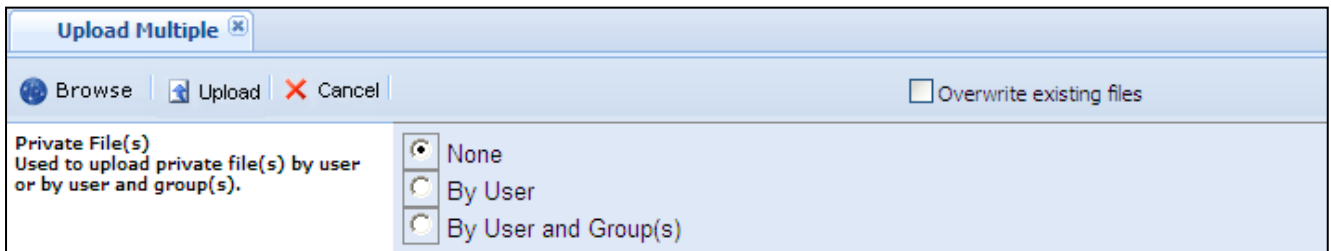
- Content Type:** A dropdown menu showing "Ji Content Type".
- Name \*:** A text input field containing "Employment Application Form" followed by ".docx".
- Title:** An empty text input field.
- Single line 1:** An empty text input field.
- Multiple Line 1:** A large empty text area.
- Choice 1:** A dropdown menu showing "Enter Choice #1".
- Number 1:** An empty text input field.
- Currency 1:** An empty text input field.
- Date Only 1:** A date picker field.
- Person 1:** A text input field with a person icon and a checkmark icon.
- Yes No 1:** A checked checkbox.
- Lookup 1:** A dropdown menu showing "(None)".
- hyperlink 1:** A section with a label "Type the Web address: (Click here to test)", a text input field containing "http://", a label "Type the description:", and another empty text input field.
- Date Time 1 1:** A date and time picker field showing "12 AM" and "00".

- Clicking on Submit, will save the properties assigned to this document
- Clicking on Cancel will close the File Properties window (The file will remain in the list of documents, but with no properties assigned to it)

- Clicking on Reset will reset the columns to their default value (Often blank)

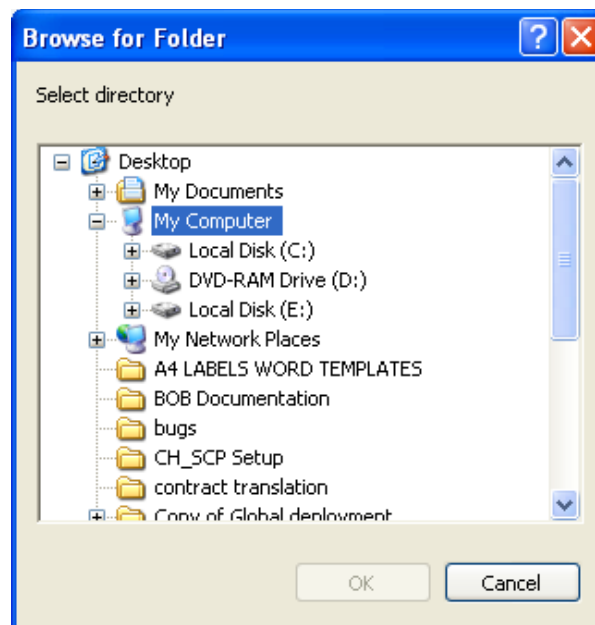
### 2.7.2.2 ADDING MULTIPLE FILES

To add multiple files, the user must select a folder or a cabinet from the tree in the navigation pane, then press the **Add →Multiple** in the document menu, and the following page will open. The user will be presented with **Upload Multiple Tab**.



The user can close this tab by clicking on **Cancel** or on the Tab's close button.

To upload documents, the user must click on **Browse** to navigate to the desired directory then click OK.



The user will be presented with a new form listing the documents of the selected directory as shown below. The user is prompted to select the documents he needs to upload then click on **Upload** button.



**Upload Multiple** [X]

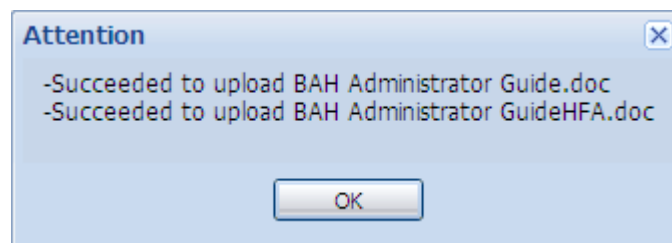
Overwrite existing files

Private File(s)  
Used to upload private file(s) by user or by user and group(s).

None  
 By User  
 By User and Group(s)

<input type="checkbox"/>	Name	Size	File Type	Created	Last Modified
<input type="checkbox"/>	BAH Administrator Guide V1.0.doc	955904	Microsoft Office Word 97 - 2003 Document	Fri Mar 20 2009	Thu Mar 27 2008
<input type="checkbox"/>	BAH Administrator Guide.doc	1119232	Microsoft Office Word 97 - 2003 Document	Fri Mar 20 2009	Fri Jan 4 2008
<input type="checkbox"/>	BAH Administrator GuideHFA.doc	1119232	Microsoft Office Word 97 - 2003 Document	Fri Mar 20 2009	Fri Jan 4 2008
<input type="checkbox"/>	BAH Functional specifications v2.3.doc	1675264	Microsoft Office Word 97 - 2003 Document	Fri Mar 20 2009	Thu Jan 31 2008
<input type="checkbox"/>	BAH Intallation Guide 1.0.doc	264192	Microsoft Office Word 97 - 2003 Document	Fri Mar 20 2009	Wed Mar 26 2008
<input type="checkbox"/>	BAH Migration Tool User Guide 1.0.doc	374272	Microsoft Office Word 97 - 2003 Document	Fri Mar 20 2009	Tue Apr 1 2008
<input type="checkbox"/>	BAH User Guide v1.0.doc	1391616	Microsoft Office Word 97 - 2003 Document	Fri Mar 20 2009	Thu May 7 2008

A message will appear notifying the user of the files uploading status once the operation finishes.



Uploaded documents will be added to the Cabinet's/Folder's Documents.

### 2.7.2.3 SCAN

To scan a file, the user must select a folder or a cabinet from the tree in the navigation pane, then press the **Add → Scan** in the document menu, and the following page will open.




**Scan** [X] [Y] [Z]

Use this form to scan new files.

Upload selected images as one PDF file.  Add as a new version to existing files

Private File(s)  
Used to upload private file(s) by user or by user and group(s).

None  
 By User  
 By User and Group(s)

<input type="checkbox"/>	Scanned Image	Name	Size	Last Modified
<input type="checkbox"/>		<a href="#">Sunset.jpg</a>	71189	Wed Aug 4 2004
<input type="checkbox"/>		<a href="#">Water lilies.jpg</a>	83794	Wed Aug 4 2004
<input type="checkbox"/>		<a href="#">Winter.jpg</a>	105542	Wed Aug 4 2004

The user selects one or multiple scanned images to be uploaded to the selected folder.

The user can choose to upload selected image(s) as one PDF file by checking the **Upload selected images as one PDF file** checkbox and/or set the file as private file by checking **Private file** checkbox.

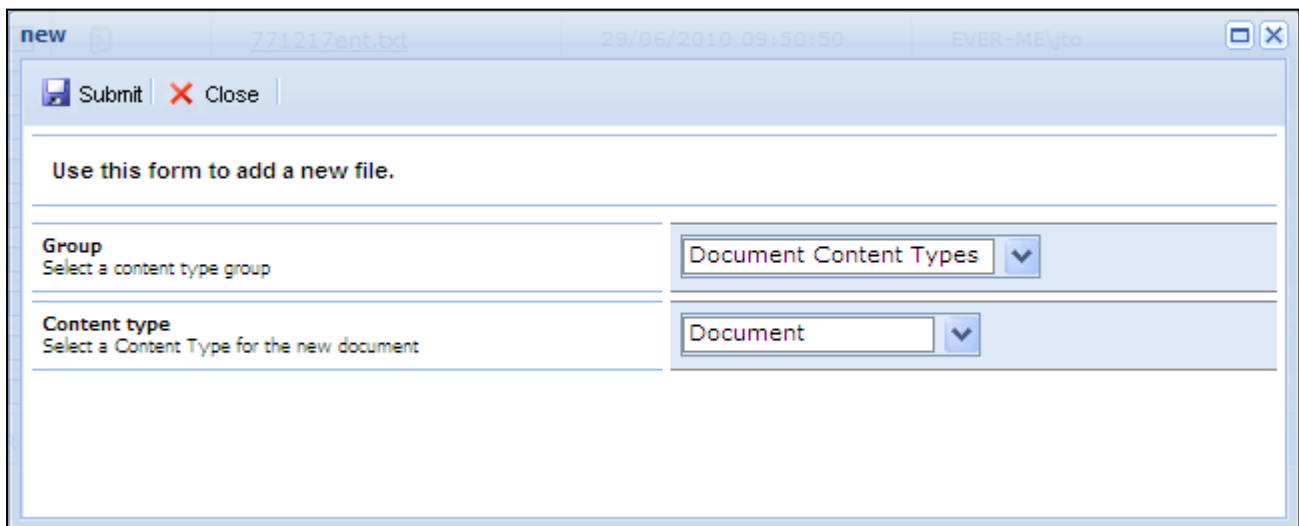
The user can also check the **Overwrite/Add as a new version to existing files** checkbox in order to overwrite/add a new version to existing files having the same name as the uploaded ones.

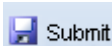
The user can delete selected images by clicking delete button .

#### 2.7.2.4 NEW DOCUMENT

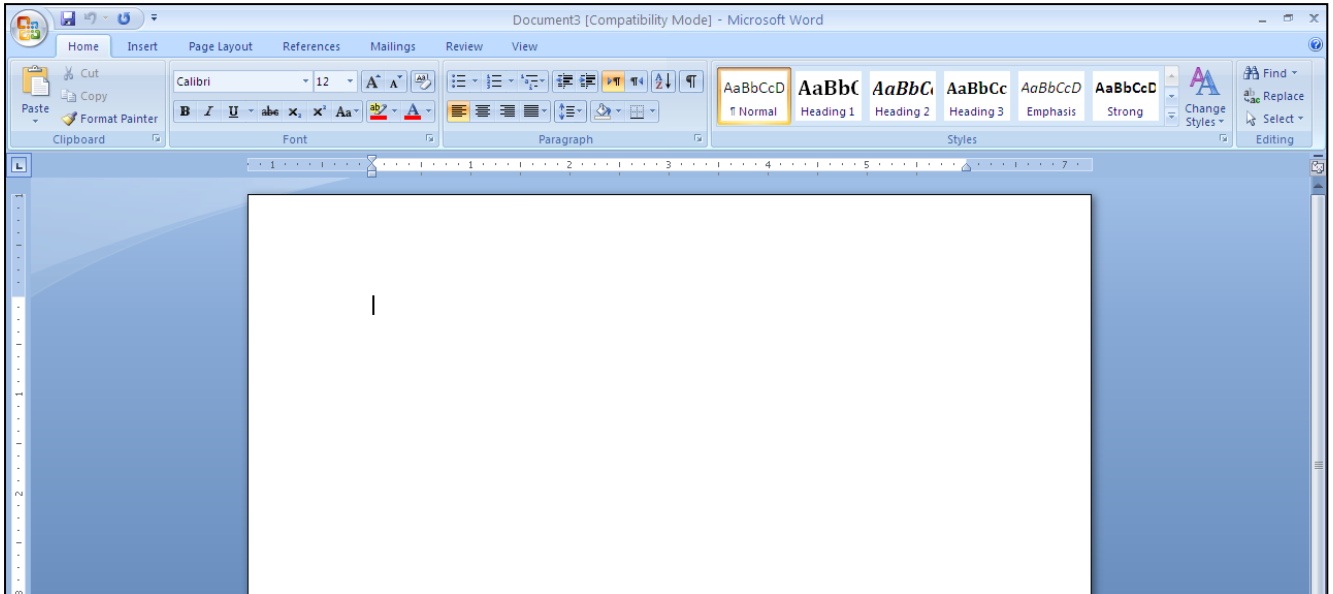
- ES-DMS SE integrates closely with Microsoft Office suite applications.
- It provides users with complete interaction features with ES-DMS SE without leaving the Microsoft Office suite applications.
- It provides users with enhanced navigation, in-browser rendering and sometimes editing of Microsoft Office documents.
- It provides users with a two-way synchronization with collaborative information, documents, and business data stored.


To add a new document, the user selects a folder or a cabinet from the tree then click the **“New”** button in Document menu. The user will be presented with a new window asking for the content type group and the content type of the new document as shown below.

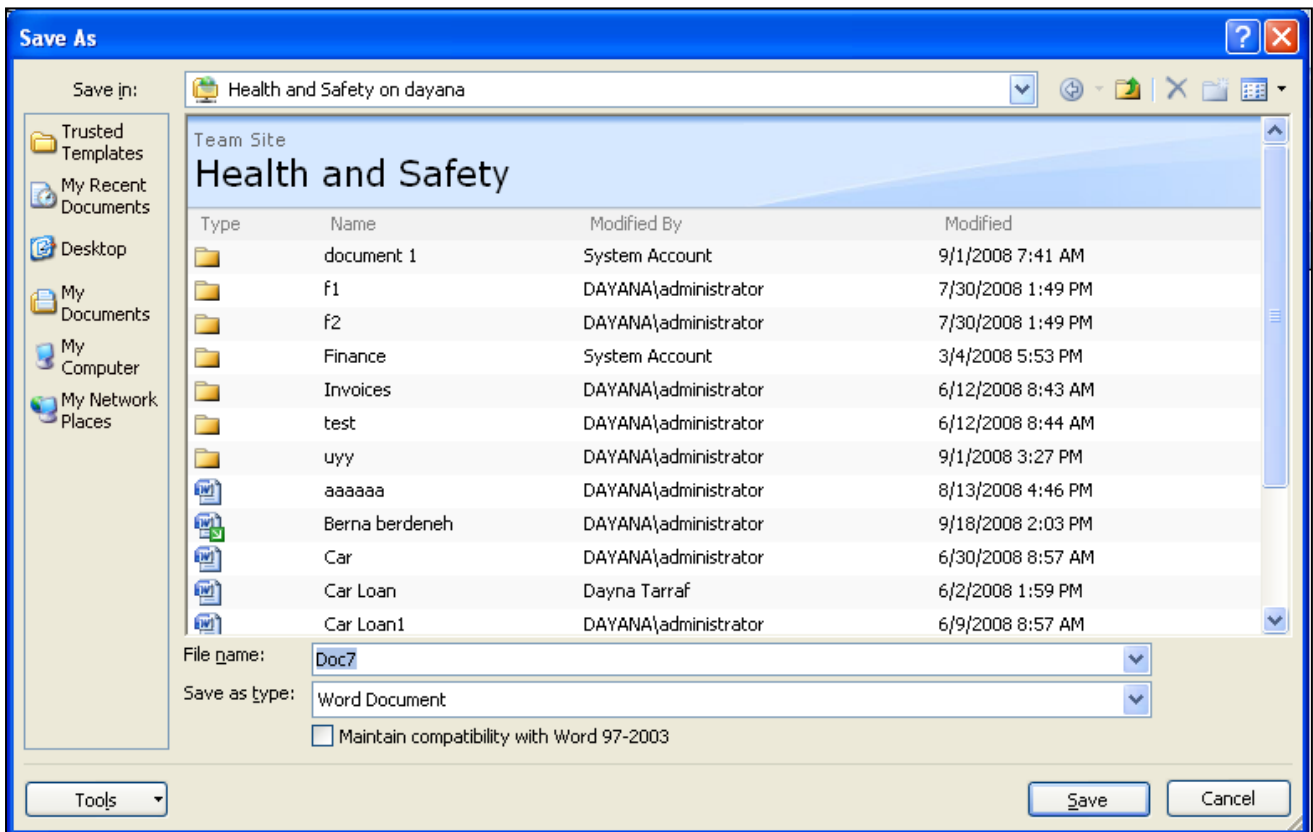


The user selects a content type from the drop down list then click on submit .

- If the selected content type doesn't have any template, a new word document will open as shown below:

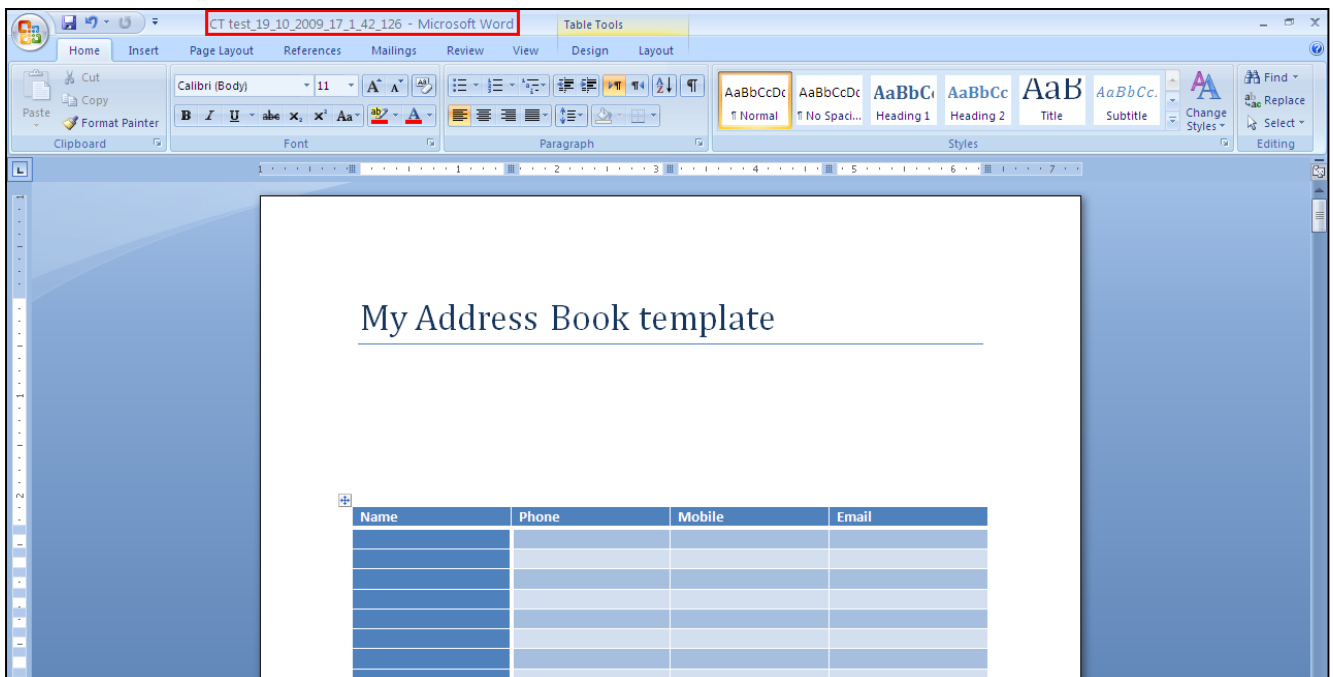



The user may enter the necessary information then click on Save button  to save the changes. The following window will open:




1. The user must select the URL of ES-DMS (SE) WSS Parent Site. The list of Document Cabinets will be filtered in order to match the selected site.
2. The user must select the Document Cabinet in which he wants to save the Document.
3. The user must enter the File name in the correspondent field then click Save button.

- If the selected content type has a special page, a new word document will open with the correspondent template:




The user may enter the necessary information then click on Save button  to save the changes. The document name will be saved under the following format: Content Type name\_Date\_Time as follows `CT test_19_10_2009_17_1_42_126 - Microsoft Word`

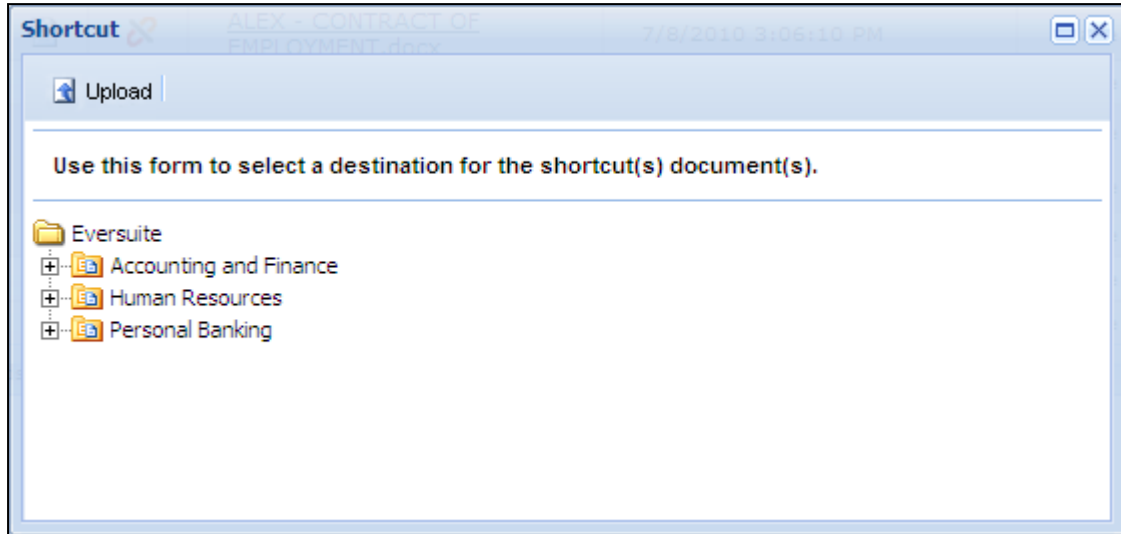
### 2.7.3 DELETING DOCUMENTS

To delete a document, the user must select one or more documents then click on **Delete** button  in **Document** menu. The selected document(s) will be deleted after a confirmation message.

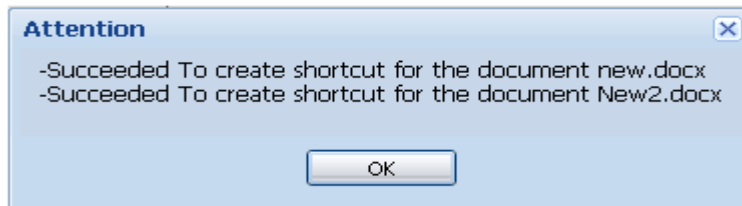
A deleted Document is sent to the recycle bin; administrators can either restore or delete the Document permanently.

### 2.7.4 SHORTCUT

To create a Shortcut, the user selects one or more files then click **Shortcut** button  in Document menu. The user will be presented with the following window.











The user must select the destination Folder or Cabinet for the shortcut, then click upload. A message will appear showing if the shortcut was created successfully or not.



Shortcut documents will be created in the destination document.


#### 2.7.4.1 FIND TARGET

To view the original document, the user right clicks a shortcut, then click on  Find Target .

<input type="checkbox"/>	Type	Links	Name	Modified	Modified By	Status
<input type="checkbox"/>			Employment Application Form.docx	7/8/2010 3:03:55 PM	Grace BOUTROS	
<input type="checkbox"/>			MARK - CONTRACT OF EMPLOYMENT.docx	7/12/2010 9:23:55 AM	System Account	
<input checked="" type="checkbox"/>			Report.xlsx	7/12/2010 9:36:19 AM	System Account	
			whom it may concern.pdf	7/12/2010 9:24:31 AM	Grace BOUTROS	

Records per page: 10 Show Filter - Records: 1 - 4 of 4 - Pages: 1

The Document tab of the original Document will open. Only the original Document will appear.

<input type="checkbox"/>	Type	Links	Name	Modified	Modified By	Status
<input type="checkbox"/>			Report.xlsx	4/15/2010 4:53:46 PM	Jihane TOUMA	

Records per page: 10 Show Filter - Records: 1 - 1 of 1 - Pages: 1

[Click here to view all files](#)

To view all files, the user clicks on the link [Click here to view all files](#) on the bottom of the page.


## 2.7.5 EDIT OPERATIONS

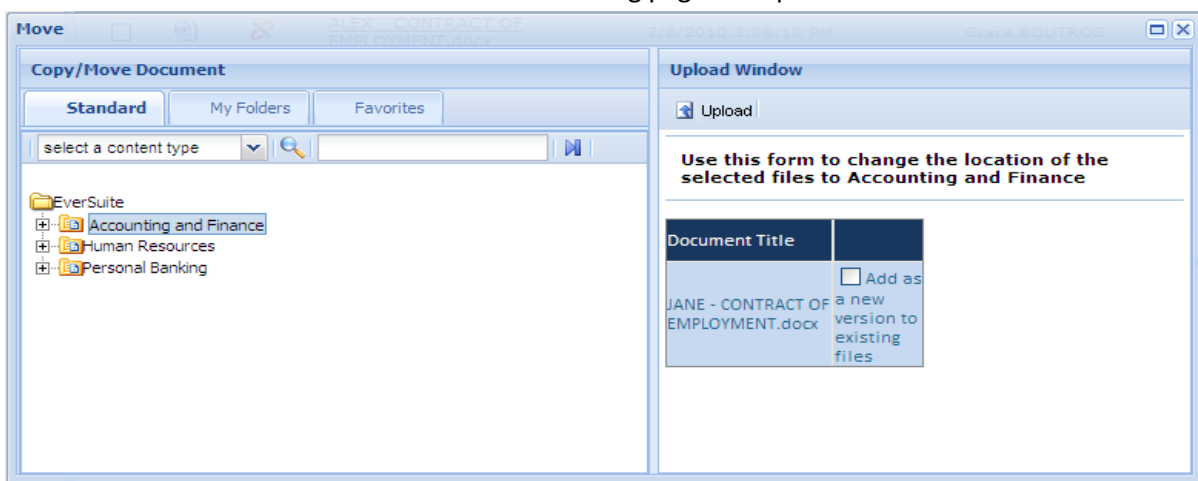
The section “**Edit**” visible in document menu provides sub-sections allowing the user to copy/move a selected folder.



### 2.7.5.1 MOVING DOCUMENT

To move a selected document, the user selects one or more Documents then clicks on **Edit** → **Move** button

 Move in the Document menu. The following page will open.




The user chooses the destination Folder or Cabinet to which he wants to move the document(s) from the Standard tree, My Folders tree or Favorites tree then click on Upload.

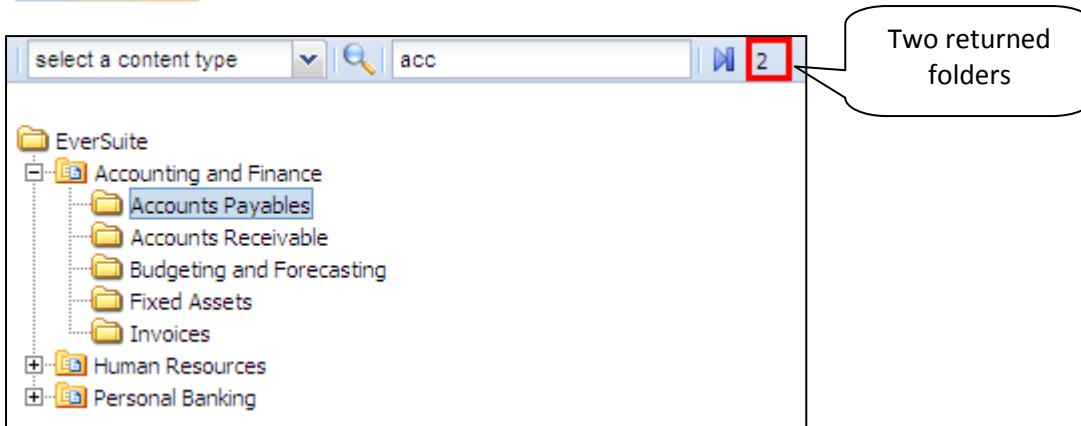
Users can choose to overwrite (or create a new version of) the Document(s) if it already exists in the new Folder by checking the correspondent checkbox.


To search for a specific folder in any tree the user must use the search toolbar on top of Move window:



- 1- Select a content type
- 2- Enter the search criteria in search field
- 3- Click on 

Folder search results will appear selected in the correspondent tree, and the number of returned results appears in the search toolbar.



The user can move from one folder to the next one through the blue arrow .

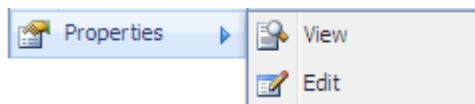
**N.B:** Once moved to its new (destination) location, the Document will be removed from its original location. A message will appear showing if the document was moved successfully or not.

### 2.7.5.2 COPYING DOCUMENT

Copying a Document is the same as moving it, except that it will not be removed from its original location. Refer to [Section 2.7.6.1: “Moving Document”](#) for detailed instructions.

## 2.7.6 DOCUMENT PROPERTIES

The section “**Properties**” visible in Document menu provides sub-sections allowing the user to view/edit the properties of a selected document.



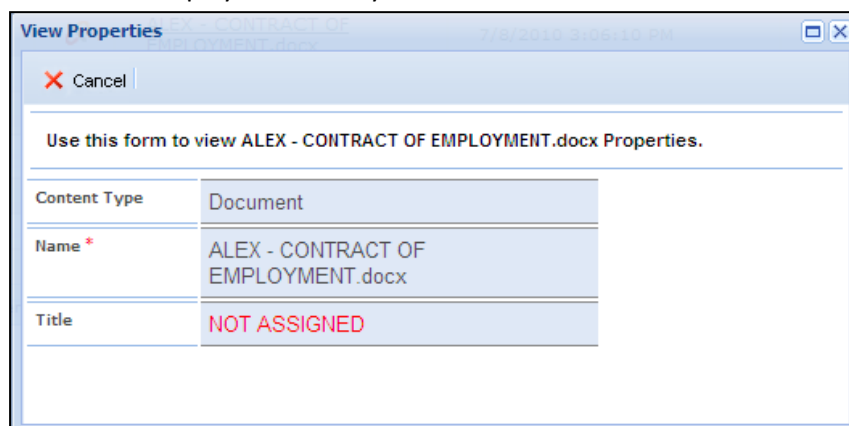
### 2.7.6.1 VIEW FILE PROPERTIES

The user must select one or more documents having the same content type then click on **View** button

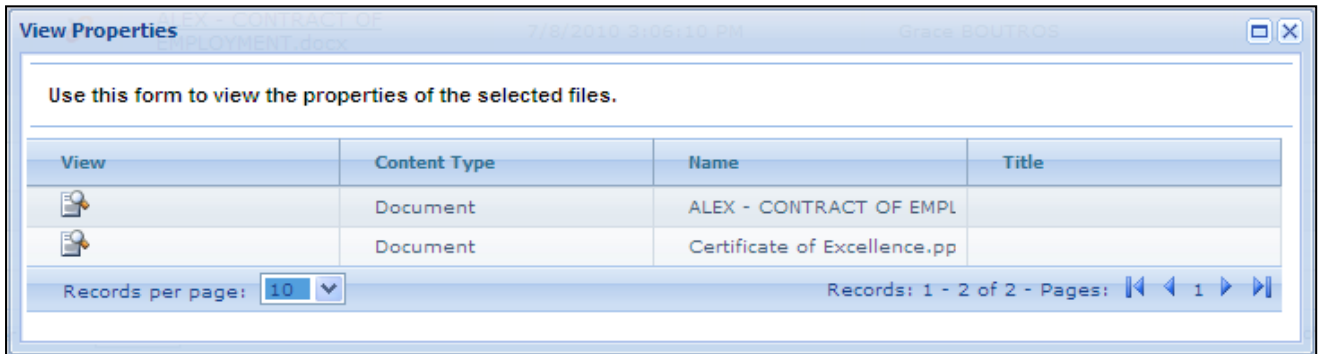


in the document **Properties** menu.

A View Properties window will display in read only mode.



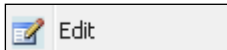
In case more than one document having the same content type are selected, the following page will open. The user must click on one of the icons in view column to view the document properties.



### 2.7.6.2 EDIT FILE PROPERTIES

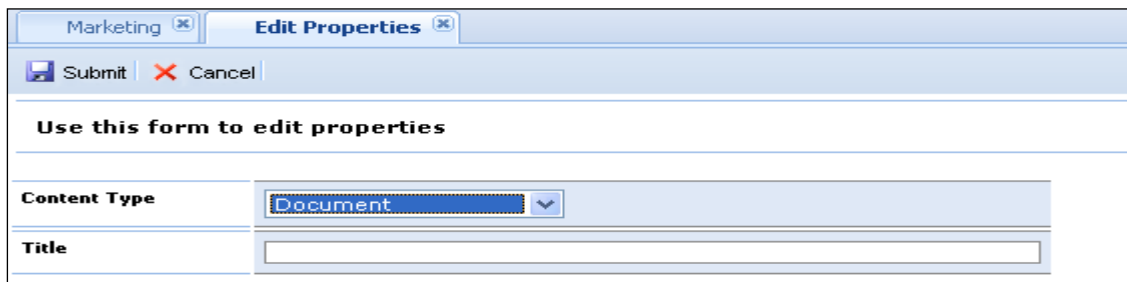
In this section, the user can edit the properties of the selected document.

The user must select one or more files having the same content type then click the **Edit** button



in the document Properties menu.

If one document is selected, the page will display the properties of the selected document(s) in edit mode.











In case more than one document having the same content type are selected, the following page will open.



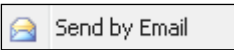
Submit | Cancel

**Use this form to edit properties.**

<input checked="" type="checkbox"/>	Content Type	Report
<input type="checkbox"/>	Title	
<input type="checkbox"/>	Report Description	
<input type="checkbox"/>	Save to report history	<input type="checkbox"/>
<input type="checkbox"/>	Parent ID	
<input type="checkbox"/>	Owner	<input type="text"/>   Owner of this document
<input type="checkbox"/>	Report Category	
<input type="checkbox"/>	Report Status	
<input type="checkbox"/>	Report Parent Name	
<input type="checkbox"/>	Report Created	<input type="text"/>  12 AM 00
<input type="checkbox"/>	Report Created By	<input type="text"/>  
<input type="checkbox"/>	Report Modified	<input type="text"/>  12 AM 00
<input type="checkbox"/>	Report Modified By	<input type="text"/>  

The user can add the necessary changes and the checked fields will be saved upon clicking on “Submit” button.

## 2.7.7 SEND BY EMAIL

To send a document by mail, the user must simply select one or more documents then click on **Send by Email** button  in the document menu.

The following page will open.

**Send By Mail**

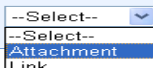
**Use this form to send by mail the selected document(s).**

Send

To:

Cc:

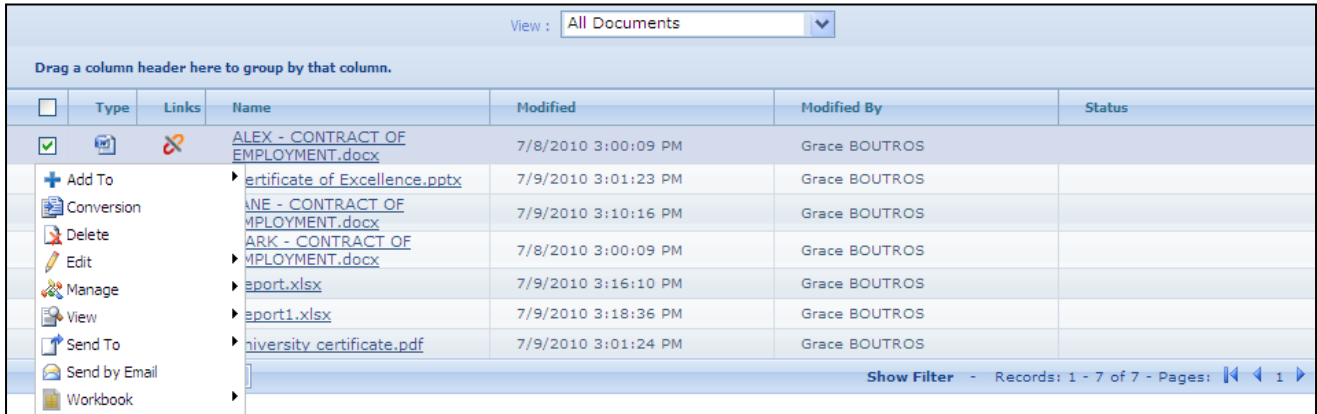
Subject:

Send mail as:   
 --Select--  
 --Select--  
 Attachment  
 Link

The user must enter the Email addresses and the subject of the email, and then choose to send the selected files as Links or as Attachments and finally click **Send**.

## 2.7.8 DOCUMENT SERVICES

Once the user right clicks on a document row, the Document Services drop down menu will appear.



The screenshot shows a document management interface with a table of documents. A context menu is open over the first document row. The table has columns for Type, Links, Name, Modified, Modified By, and Status. The context menu includes options like Add To, Conversion, Delete, Edit, Manage, View, Send To, Send by Email, and Workbook.

Type	Links	Name	Modified	Modified By	Status
		ALEX - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
		ertificate of Excellence.pptx	7/9/2010 3:01:23 PM	Grace BOUTROS	
		NE - CONTRACT OF EMPLOYMENT.docx	7/9/2010 3:10:16 PM	Grace BOUTROS	
		ARK - CONTRACT OF EMPLOYMENT.docx	7/8/2010 3:00:09 PM	Grace BOUTROS	
		eport.xlsx	7/9/2010 3:16:10 PM	Grace BOUTROS	
		eport1.xlsx	7/9/2010 3:18:36 PM	Grace BOUTROS	
		niversity certificate.pdf	7/9/2010 3:01:24 PM	Grace BOUTROS	

This section is divided into the following sub-categories:

- Add to:
  - Electronic deposit
  - Favorites
- Conversion
- Delete
- Edit:
  - Check out
  - Document
  - Properties
  - Image viewer
- Manage:
  - Links \ Related Formats
  - Permissions
  - Routes
- View:
  - Audit Trail
  - Properties
  - Version history
- Send to:
  - Copy

- Download a copy
- Move
- Shortcut
- Send by mail
- Workbook:
  - Transform
  - Mark to import

### 2.7.8.1 ADD TO → ELECTRONIC DEPOSIT

The **Electronic deposit** feature is used to allow users to send by mail several selected documents located in different locations (document libraries or folders).

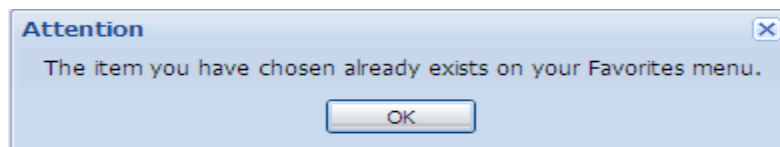
Use the document context menu **Add to→Electronic deposit** to add the selected document to the electronic deposit of the current user.

The user can manage documents in the Electronic deposit in the Services menu, Manage Electronic Deposit. (Managing Electronic Deposit will be explained in details later in this document. Refer to [section 2.12.4 Manage Electronic Deposit](#))

### 2.7.8.2 ADD TO → FAVORITES


To add a selected file to the user’s favorite documents, the user must click on **Add to→Favorites** in the document context menu.

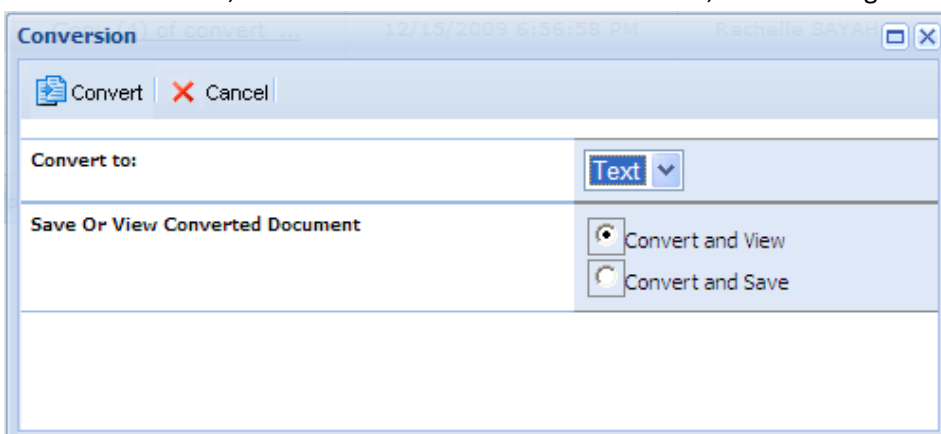
If the selected item already exists, the following message will appear.



Viewing Favorites will be explained in details further in the manual course. Refer to [section 2.9.1 Favorites](#) for detailed instructions.

### 2.7.8.3 CONVERT

**Convert** option is only available for specific document types in the document’s context menu. To convert a selected document, the user must click on  **Convert.....**, the following conversion window will open.



The user must select the type to convert to from the drop down list filtered as follows:

- World document can be converted to Text document or PDF document
- Excel document can be converted to PDF document
- PDF document can be converted to Word document
- Text can be converted to Word document and PDF document

He may also select to view or to save the converted document.

Clicking on  **Convert** button will convert the document to the selected type.

#### 2.7.8.4 DELETE

To delete a document, the user must select an item then click on **Delete** in the document right click menu. The document will be deleted after a confirmation message.

#### 2.7.8.5 EDIT → CHECK OUT – CHECK IN

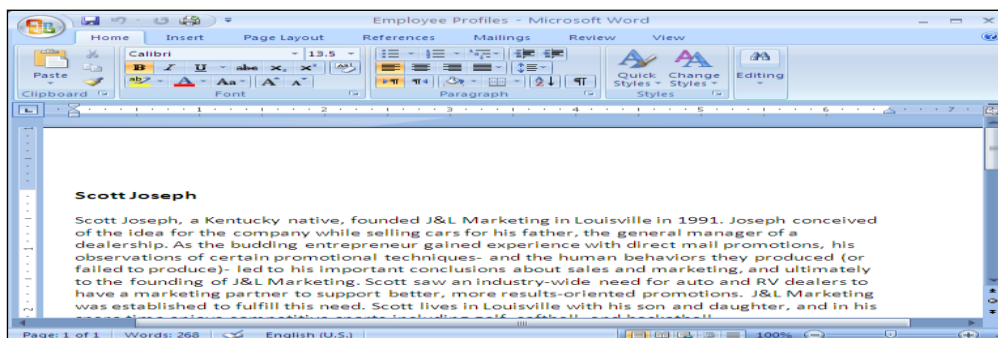
To prevent other users from editing a document, the connected user must click on **Edit→Check Out**.

Some cabinets force documents' **Check Out**. Documents in those cabinets/folders should be checked out by users before being edited.

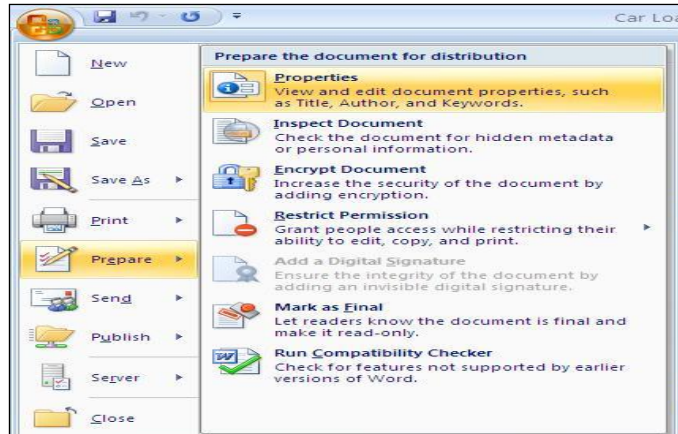
After check out, the user can **Check In** to release the file and save the changes, or **Discard Check Out** to release the file and discard changes.

#### 2.7.8.6 EDIT → EDIT DOCUMENT

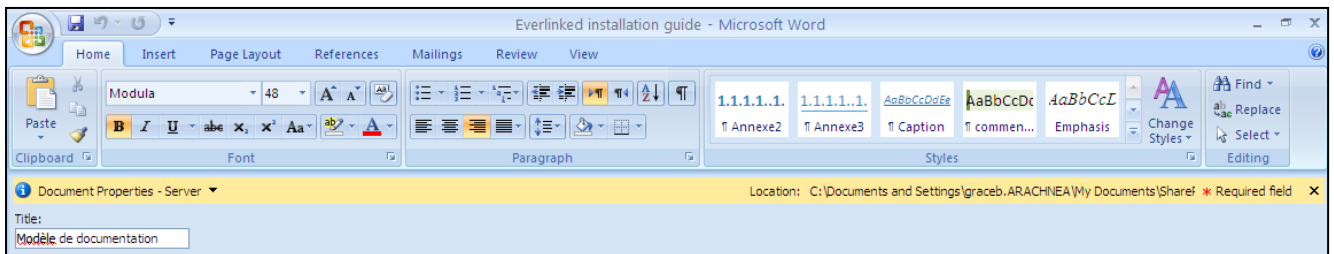
To open a document for editing the user must click on **Edit→Edit Document**. The document will open in edit mode.



To view and edit the document properties, the user must click on **Properties** as shown in the figure below.



The properties of the selected document will appear in edit mode on top of the page.



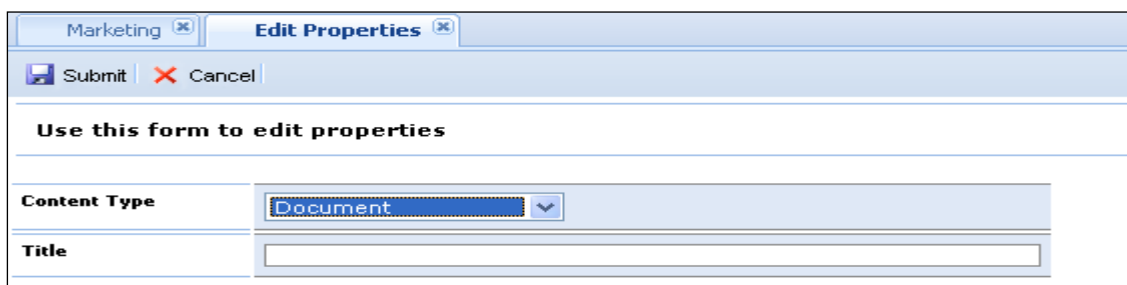
The user can make the necessary modifications to the selected document then click on save to save the changes.

### 2.7.8.7 EDIT → PROPERTIES

In this section, the user can edit the properties of the selected document.

The user must select a document then click on **Edit → Properties** in the document context menu.

The following page will open showing the properties of the selected document in edit mode.



The screenshot shows the 'Edit Properties' form. It has a title bar with 'Marketing' and 'Edit Properties' tabs. Below the title bar are 'Submit' and 'Cancel' buttons. The main content area has the heading 'Use this form to edit properties'. There are two fields: 'Content Type' with a dropdown menu set to 'Document', and 'Title' with an empty text input field.

The user can add the necessary changes then click on “Submit” button to save the changes.

### 2.7.8.8 EDIT → IMAGE VIEWER

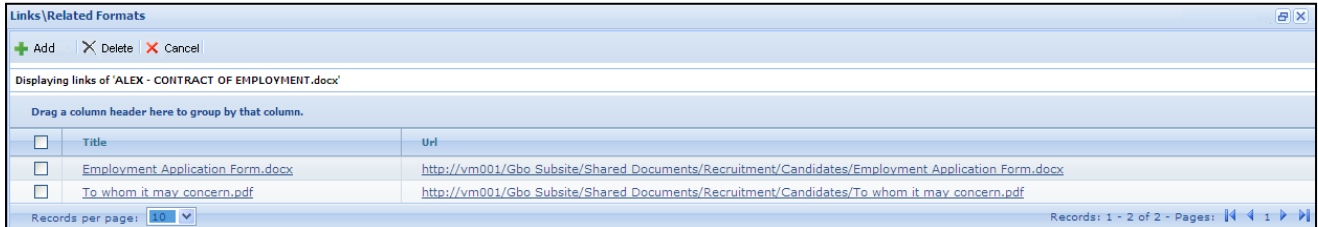
The Image Viewer opens Images and AutoCAD files in the built in image viewer of the System.

Image Viewer will be explained in details further in the Manual Course.

Refer to [Section 2.8: “Advanced Imaging Services”](#) for detailed instructions.

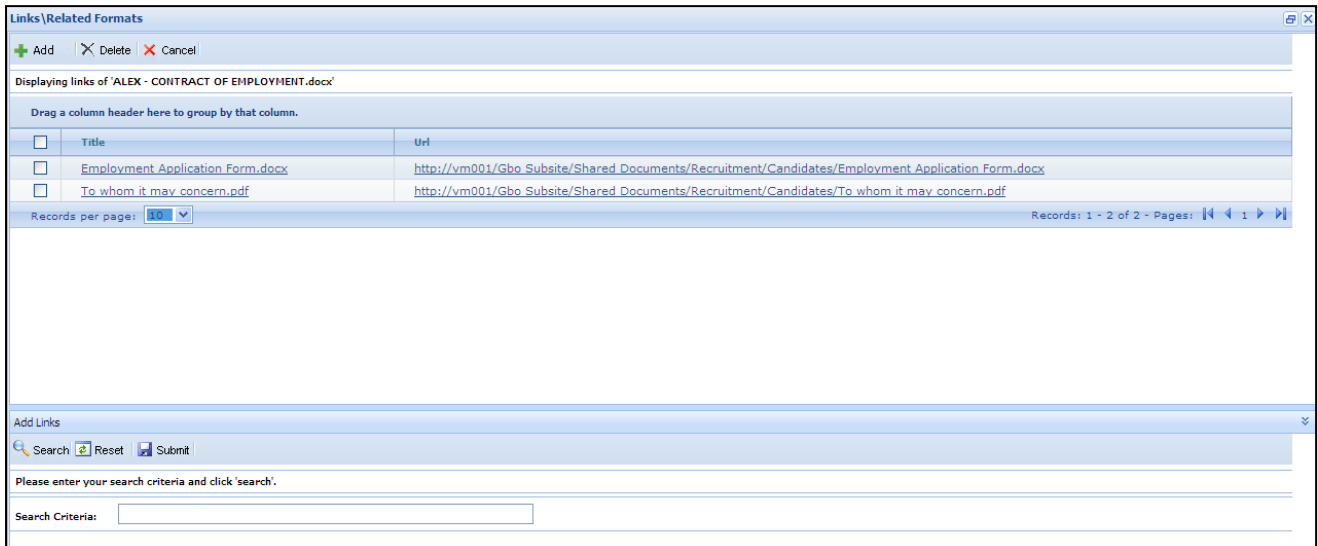
### 2.7.8.9 MANAGE → LINKS \ RELATED FORMATS

To view the links \ related formats of a document the user must select a document then click on Manage → Links \ Related Formats and the following page will open.



The Links \ Related Format grid shows a list of the Documents linked to the selected document.

To add a new link the user must click on **+ Add** button. The **Add Links** frame will open in the bottom of the page allowing the user to search for a document to be linked to the selected document.



The user must:

- Enter search criteria
- Click on **Search** button
- Select the document(s) to be linked
- Click on **Submit** button

The submitted document(s) is now linked to the parent document.


To remove a document link, the user must select a link then click on **Delete** button.


### 2.7.8.10 MANAGE → PERMISSIONS

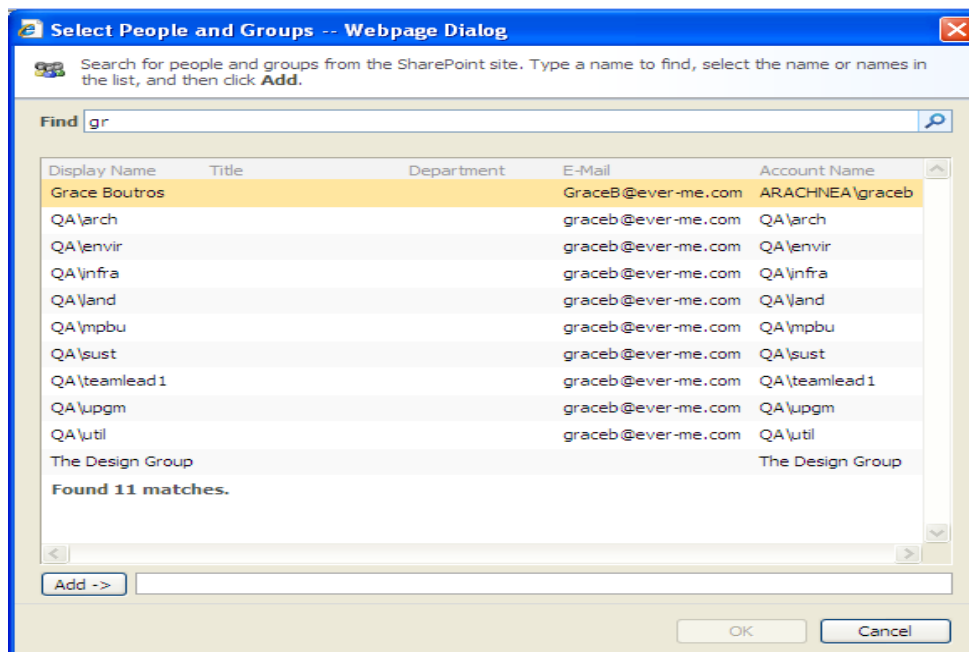
#### 2.7.8.10.1 ADDING PERMISSION

To add document permission the user select a document then click on **Manage → Permissions**. The following page will open.




The user must select users or groups, select Permission level and then click on  button to save the assigned privileges.

He can enter the users or groups to which he wants to give permission or search for people or groups from the SharePoint site by clicking on browse  button. The following page will open.

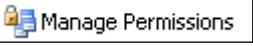


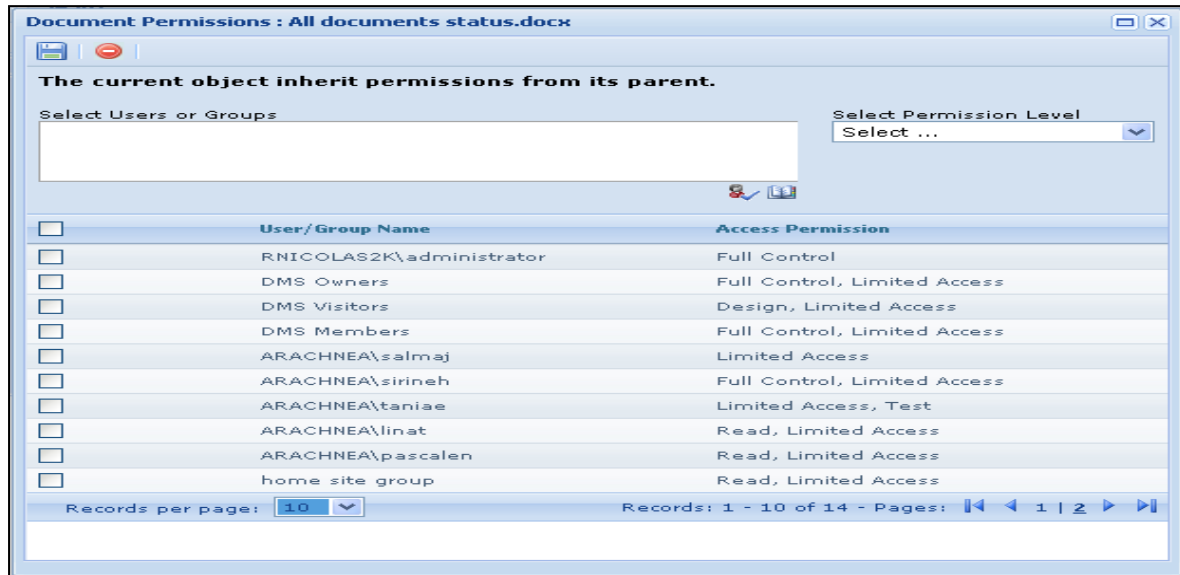
The user is requested to type a name to find, select the name or names in the result list and then click Add.


### 2.7.8.10.2 DELETE PERMISSION

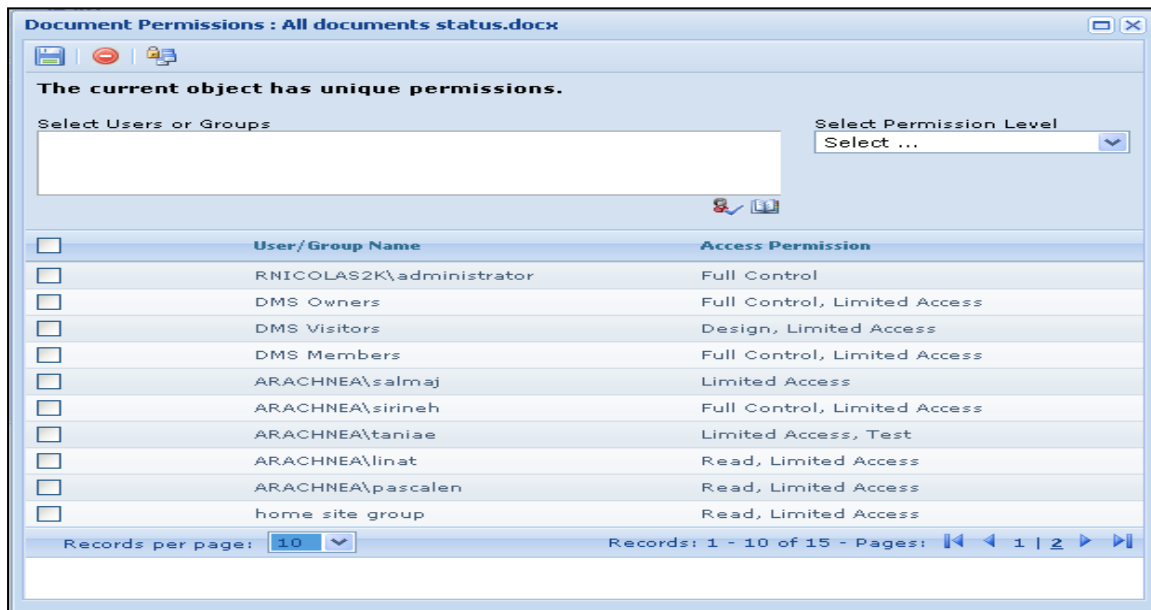
The user must select privileges from the grid then click on  button to remove assigned privileges.

### 2.7.8.10.3 INHERIT PERMISSION

By default, documents inherit permissions from their parent cabinets. Once the user clicks on  button, the following window will open with a message on top **“The current object inherit permissions from its parent”**



Once the user changes permission, inheritance will be broken, and the permission page will show the following message **“The current object has unique permissions”** and the Inherit Permissions button  to restore inheritance.



### 2.7.8.11 MANAGE → ROUTES

Once the user clicks on **Manage → Routes** in the document right click menu, the following page will open allowing the user to manage the routes of the selected document.



**View Routes**

Use this form to manage the routes of the document: **salmaj/Conversion Tools.docx**

	From	Sent To	Purpose	Status	Sent Date	Due Date
<input type="checkbox"/>	Jihane Touma	Sirine El Helou	For Info	New	19/10/2009	
<input type="checkbox"/>	Jihane Touma	Jihane Touma	For Info	Closed	19/10/2009	
<input type="checkbox"/>	Salma Jaber	Salma Jaber	For Info	New	19/10/2009	

Page 1 of 1

---

Send

Send To \*:  Purpose \*: For Info

On Behalf Of:  Due Date:

Send Notification:

Required Action:

\*: Required Fields

The manipulation is the same as explained above in [section 2.3.3.2.2 Manage Routes](#)

### 2.7.8.12 VIEW → AUDIT TRAIL

Audit Trail will appear in the document right click menu only when this document is created by the logged in user. Once the user clicks on **View → Audit Trail**, the following window will open allowing him to view the audit trail of the selected document.

Use this form to view the audit and trail for the selected documents.

Action Type:  User:

Action From Date:  Action To Date:

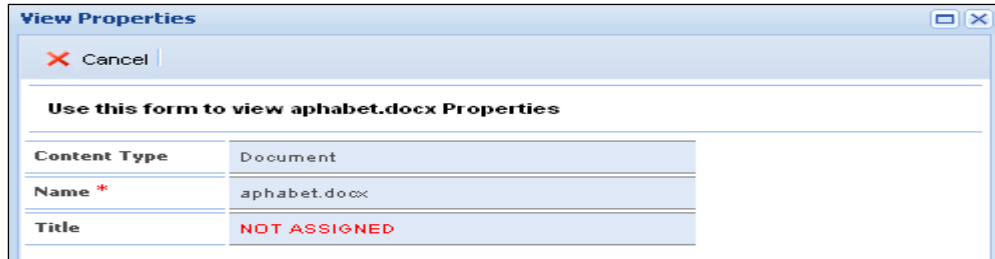
Audit Results

	Event	Occurred	User	Object
	View	03/10/2010 02:...	Grace BOUTROS	sites/Total/JI Subsite/JI CABINET TEST/JI Folder 1/COPYOPM_IssuesList_20100218.xlsx
	Update	03/10/2010 02:...	Grace BOUTROS	sites/Total/JI Subsite/JI CABINET TEST/JI Folder 1/COPYOPM_IssuesList_20100218.xlsx
	View	03/10/2010 02:...	Grace BOUTROS	sites/Total/JI Subsite/JI CABINET TEST/JI Folder 1/COPYOPM_IssuesList_20100218.xlsx
	View	03/10/2010 02:...	Grace BOUTROS	sites/Total/JI Subsite/JI CABINET TEST/JI Folder 1/COPYOPM_IssuesList_20100218.xlsx
	View	03/10/2010 02:...	Grace BOUTROS	sites/Total/JI Subsite/JI CABINET TEST/JI Folder 1/COPYOPM_IssuesList_20100218.xlsx
	View	03/10/2010 02:...	Grace BOUTROS	sites/Total/JI Subsite/JI CABINET TEST/JI Folder 1/COPYOPM_IssuesList_20100218.xlsx

This grid displays the modifications that occurred to selected Documents including routes. The upper frame of the window allows the user to filter Audit results according to the criteria entered. Routes will appear in filter results only when the Action Type is **Route Actions**.

### 2.7.8.13 VIEW → PROPERTIES

The user must select one or more documents having the same content type then click on **View → Properties** in the document context menu. A View Properties window will display in read only mode.

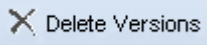


#### 2.7.8.14 VIEW → VERSION HISTORY

To view the Version History the user must click on **View → Version History**. The following page will open.

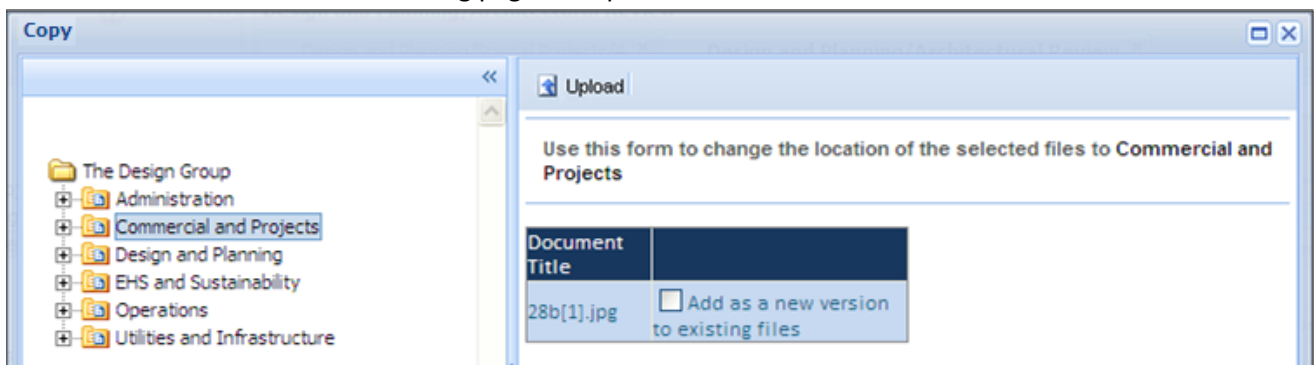


The Version History grid shows a list of the versions of the selected Document.

- To open a selected version the user must click on the correspondent link in **File Name** column.
- To view version properties the user must click on the correspondent icon in **View Properties** column.
- To delete a version the user must click on **Delete**.
- To delete all versions the user must click on 

#### 2.7.8.15 SEND TO → COPY

To copy a selected document, the user selects one or more Documents then clicks on **Send to → Copy** in the document context menu. The following page will open.



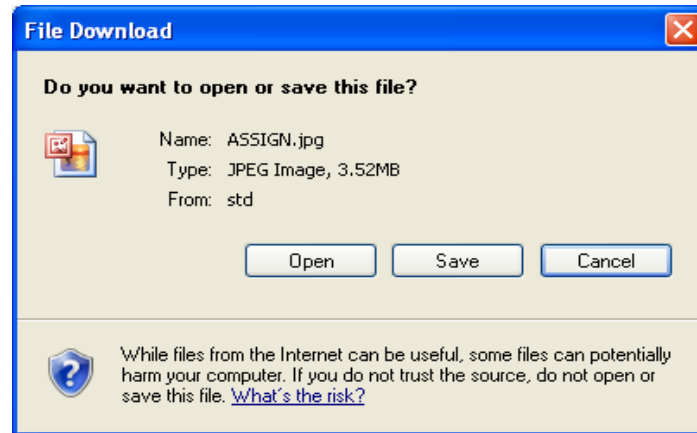
The user chooses the destination Folder or Cabinet to which he wants to copy the document(s) then click Upload.

Users can choose to overwrite (or create a new version of) the Document(s) if it already exists in the new Folder by checking the correspondent checkbox.

**N.B:** Once copied to its new (destination) location, the Document will remain in its original location.

### 2.7.8.16 SEND TO → DOWNLOAD A COPY

Once the user clicks on **Send To → Download a Copy**, the following window will open allowing him to open the document or save a copy locally.

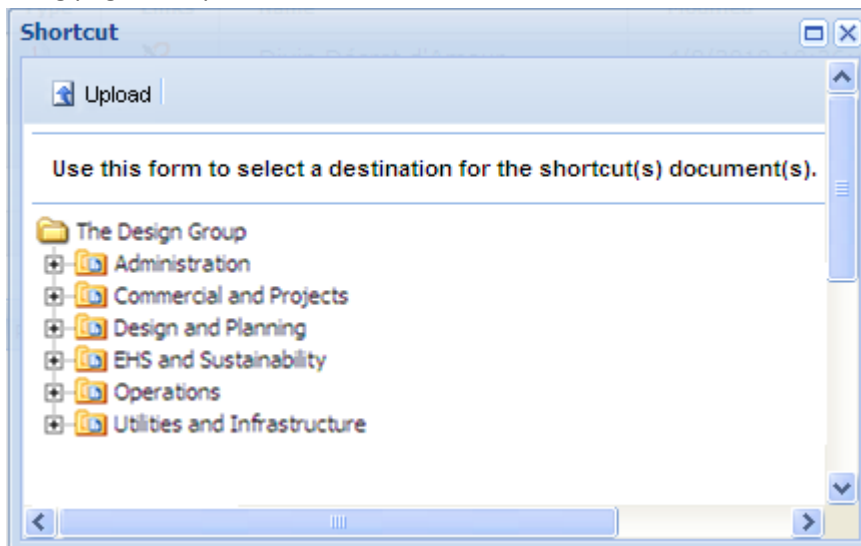


### 2.7.8.17 SEND TO → MOVE

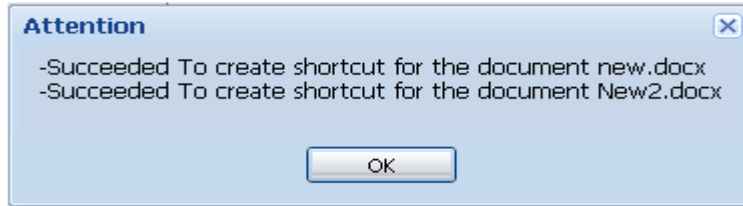
Moving a document is the same as copying it, except that it will be removed from its original location. Refer to [section 2.7.9.15: Send to → Copy](#) for detailed instructions.

### 2.7.8.18 SEND TO → SHORTCUT

The user must choose one or more documents then click on **Send To → Shortcut** in the document context menu and the following page will open.




The user must select the destination Folder or Cabinet for the shortcut, then click upload. A message will appear showing if the shortcut was created successfully or not.

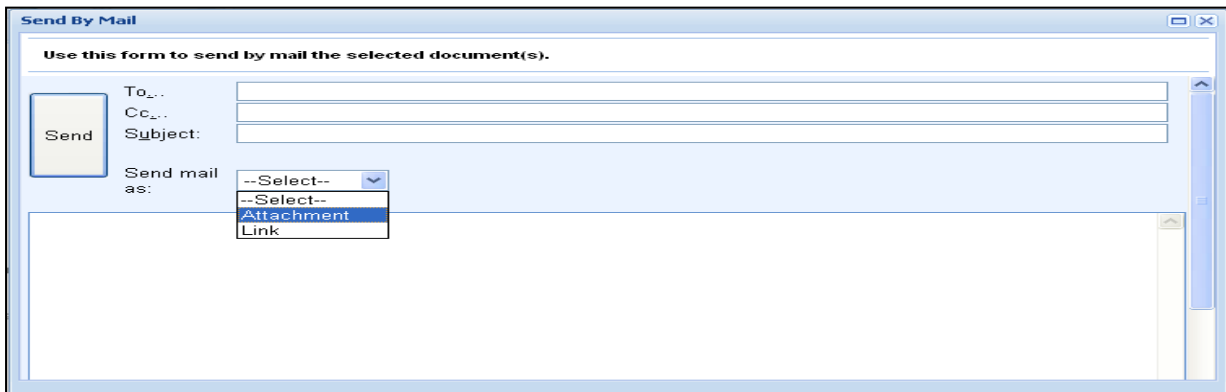


Shortcut documents will be created in the destination document.

### 2.7.8.19 SEND BY EMAIL

To send a document by mail, the user must simply select one or more documents then click on **Send by Email** button  **Send by Email** in the document menu.


The following page will open.



The user must enter the Email addresses and the subject of the email, and then choose to send the selected files as Links or as Attachments and finally click **Send**.

### 2.7.8.20 WORKBOOK → TRANSFORM

A Workbook is a file that contains other documents. To create a new workbook, the user selects **Workbook → Transform** in the document's context menu.

The selected document will be transformed to a workbook and will appear in the document grid with the following icon .

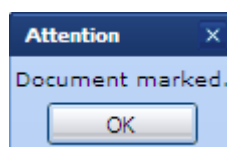
The user can add documents to the created Workbook either by importing existing documents or by uploading new ones.

The user must:

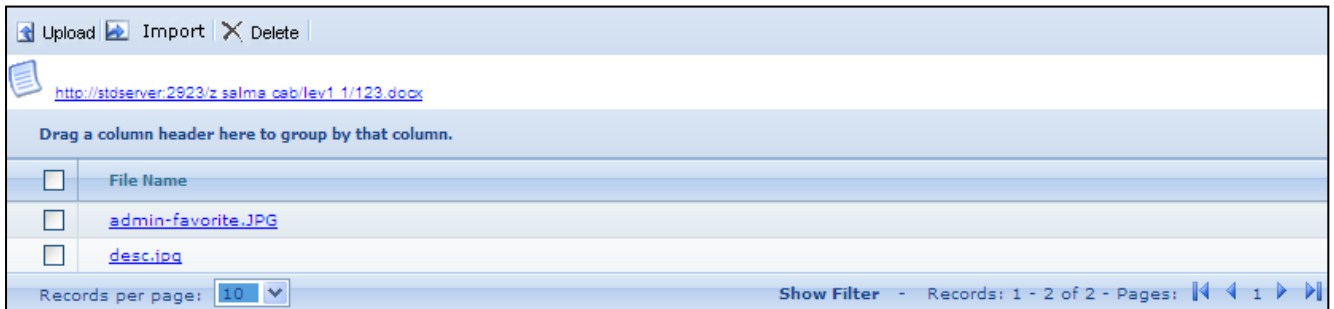
1. Select the document then click on **Workbook → Mark To Import**



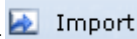
in the document's right click menu. The following message will appear showing that the document is marked.

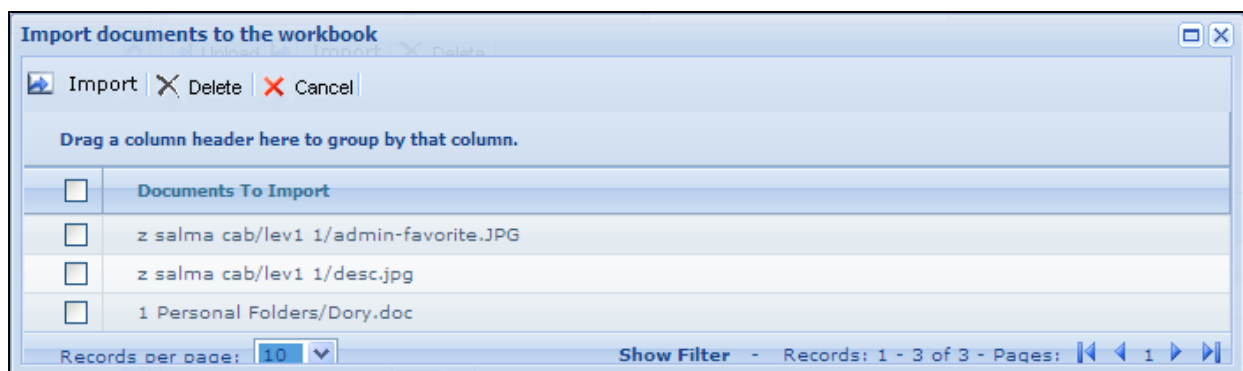


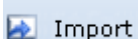
- Open the Workbook by clicking on **Workbook** → **Open** in the workbook's right click menu. The workbook will open showing all documents.



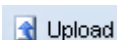
### 2.7.8.20.1 IMPORT DOCUMENT

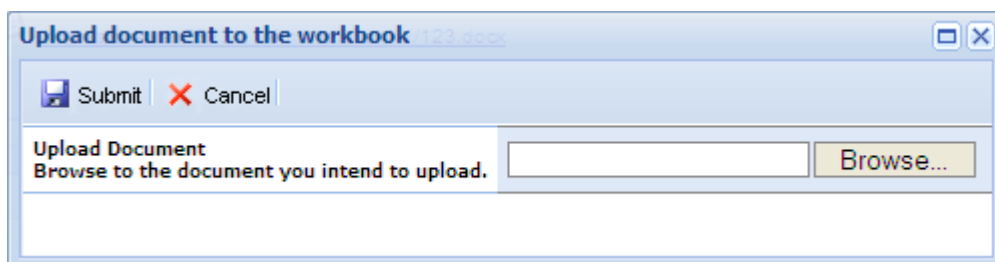
To import an existing document, the user must click on import . The list of documents marked to import will open.

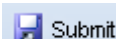


The user selects the documents to import then click on . The selected document will be imported to the workbook.

### 2.7.8.20.2 UPLOAD DOCUMENT

To upload a new document, the user must click on upload . The following page will open allowing the user to upload a new document.



The user must browse for the document then click submit  and the uploaded document will be added to the workbook.

## 2.7.9 OPENING A DOCUMENT

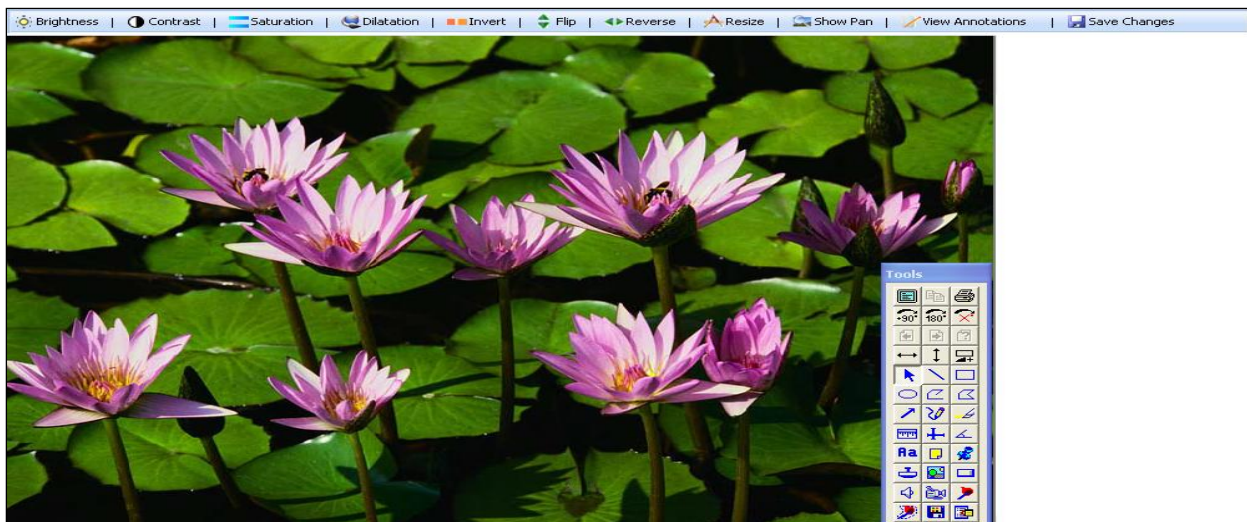
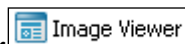
To open a document, the user must click on the correspondent link.

The user is prompted to choose a mode to open the selected document (Read Only or Edit).

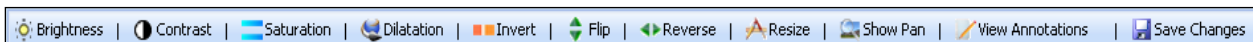


## 2.8 ADVANCED IMAGING SERVICES

To open the selected File in the Image Viewer, the user must click on Image Viewer



### 2.8.1 MENU BAR

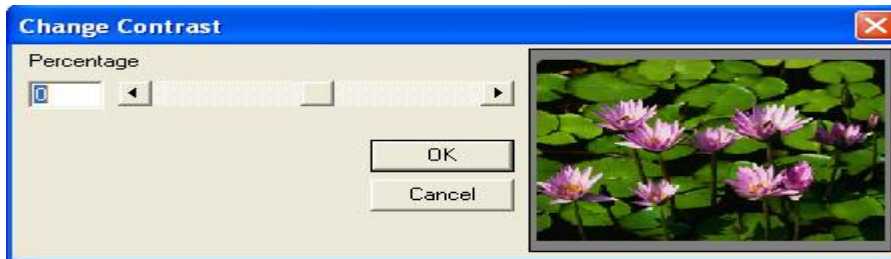


The Menu Bar allows Users to interact with the following Image Manipulation Operations:

- Brightness
- Contrast
- Saturation
- Dilatation
- Invert
- Flip

- Reverse
- Resize
- Show Pan
- View Annotations
- Save Changes

For example, when the user clicks on **Contrast** Menu Bar button, the following page opens. The user must change the percentage then press OK and the image contrast will change.



## 2.8.2 TOOLS BAR



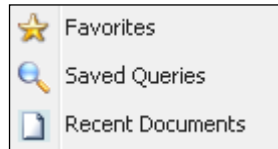
The Tools Bar allows Users to interact with the following image processing and enhancement operations:

- Full Screen
- Copy
- Print
- Rotate
- Scale
- Add Annotations (lines, notes, stamps, highlight, audio, video, text...)
- Other ...


**N.B:** Before adding annotations the User must choose if he needs the annotations to be Private (can be only viewed by the User) or Public (can be viewed by other Users of the System).

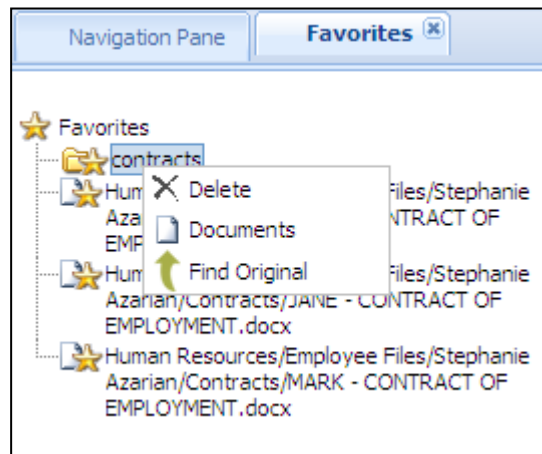
## 2.9 VIEW MENU

The menu “**View**” visible in the user Top Navigation Menu allows the user to manage Favorites/Saved Queries/Recent Documents.



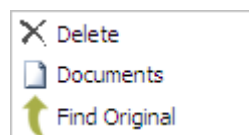
### 2.9.1 FAVORITES

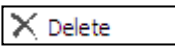
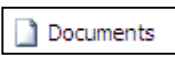
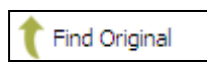
To view his favorite documents/folders/cabinets, the user must click on Favorites button  Favorites in **View** menu. The Favorites tab will open in the Navigation Pane.



Once the user right clicks **Favorites** node,  he will be able to add folders to organize the tree.

Right click the favorite folder and/or cabinet:

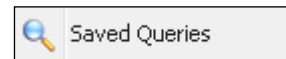


- Click on  to delete the selected folder or cabinet.
- Click on  to view the correspondent documents.
- Click on  to go to the favorite folder or cabinet in the tree.

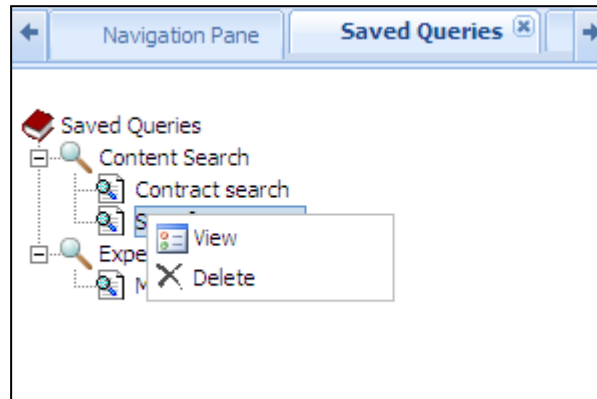


## 2.9.2 SAVED QUERIES

To view the saved queries, the user must click on **Saved Queries** button



in **View** menu.

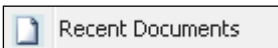


The saved queries will be sorted by search types (Content Search queries, Expert Search queries)










Once the user right clicks on a Saved Query, he will be able to delete or view its correspondent queries.

## 2.9.3 RECENT DOCUMENTS

To view his recently added or edited documents, the user must click on **Recent Documents** button



in **View** menu.

Recent Documents						
Use this form to view your recent documents.						
Drag a column header here to group by that column.						
Type	Name	Path	Author	Content Type	Last Modified	Status
	<a href="#">To whom it may concern.pdf</a>	Shared Documents/Recruitment/Candidates/To whom it may concern.pdf	Grace BOUTROS	Document	7/12/2010	
	<a href="#">JANE - CONTRACT OF EMPLOYMENT.doc</a>	Shared Documents/Employee Files/Stephanie Azarian/Contracts/JANE - CONTRACT OF EMPLOYMENT.docx	Grace BOUTROS	Report	7/9/2010	
	<a href="#">ALEX - CONTRACT OF EMPLOYMENT.doc</a>	Shared Documents/Employee Files/Stephanie Azarian/Contracts/ALEX - CONTRACT OF EMPLOYMENT.docx	Grace BOUTROS	Document	7/8/2010	
	<a href="#">Report1.xlsx</a>	Shared Documents/Employee Files/Stephanie Azarian/Contracts/Report1.xlsx	Grace BOUTROS	Report	7/9/2010	
	<a href="#">Report.xlsx</a>	Shared Documents/Employee Files/Stephanie Azarian/Contracts/Report.xlsx	Grace BOUTROS	Report	7/9/2010	
	<a href="#">University certificate.pdf</a>	Shared Documents/Employee Files/Stephanie Azarian/Contracts/University certificate.pdf	Grace BOUTROS	Document	7/9/2010	
	<a href="#">Certificate of Excellence.pptx</a>	Shared Documents/Employee Files/Stephanie Azarian/Contracts/Certificate of Excellence.pptx	Grace BOUTROS	FID	7/12/2010	
	<a href="#">Employment Application Form.docx</a>	Shared Documents/Recruitment/Candidates/Employment Application Form.docx	Grace BOUTROS	Document	7/8/2010	
	<a href="#">MARK - CONTRACT OF EMPLOYMENT.doc</a>	Shared Documents/Employee Files/Stephanie Azarian/Contracts/MARK - CONTRACT OF EMPLOYMENT.docx	Grace BOUTROS	Document	7/8/2010	

Records per page: 20 | Show Filter | Records: 1 - 9 of 9 - Pages: 1/1

To open a recent document, the user must click on the correspondent link.

## 2.10 SEARCH

The menu “**Search**” visible in the user Top Navigation Menu allows the user to execute the following types of search:

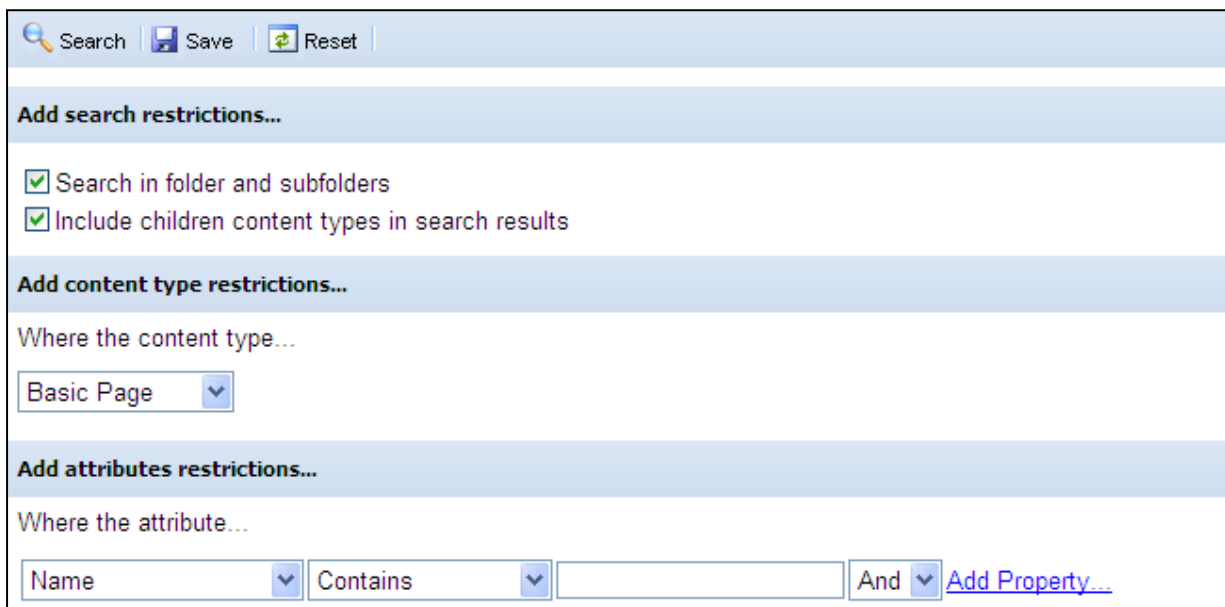
- **Folder Search:** Search for Folders within a Folder or Cabinet.
- **Expert Search:** Search documents using content types and attributes.
- **Content Search:** Search the content of the files.
- **Content Type Search:** Search for documents or folders by content type
- **Generate Solo Search:** Search the content of the files in the generated zipped folder.

### 2.10.1 FOLDER SEARCH

Already explained in [section 2.2.3.1 “Folder Search”](#)

### 2.10.2 EXPERT SEARCH

The user selects a cabinet or a folder then clicks on **Expert Search** button  in the Search menu and the following search screen will open.




The screenshot shows the Expert Search interface with the following elements:

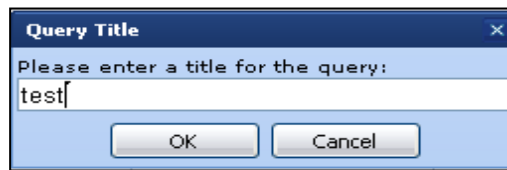
- Buttons: Search, Save, Reset
- Section: **Add search restrictions...**
  - Search in folder and subfolders
  - Include children content types in search results
- Section: **Add content type restrictions...**
  - Where the content type...
    - Basic Page (dropdown)
- Section: **Add attributes restrictions...**
  - Where the attribute...
    - Name (dropdown) Contains (dropdown) [ ] And (dropdown) [Add Property...](#)

- **Search in folder and subfolders:** if checked, the user will be able to search in folders and subfolders of the selected item, and only content types set as visible will appear in content type restrictions.
- **Include children content types in search results:** if checked, it allows the user to search in the children of the selected content type.

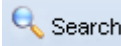
The advanced layout of this section provides the user with many different ways of searching: by content type, by name, by type, etc...

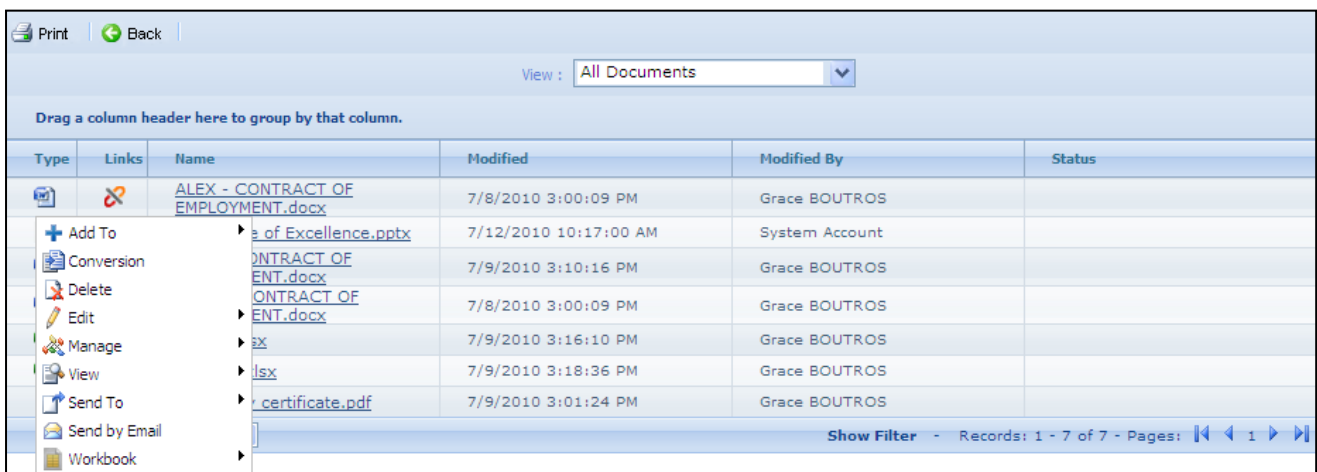
When the user selects a content type, the other search attributes will be filtered accordingly.

- To save the search query, the user must click on the save icon , and the following page will open.



The user must enter the title for the query then click OK. The chosen query will be added to the Saved Queries.

- To perform the search, the user clicks the “Search” button  on the toolbar, and the results will be listed as shown in the figure below.

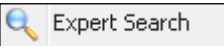


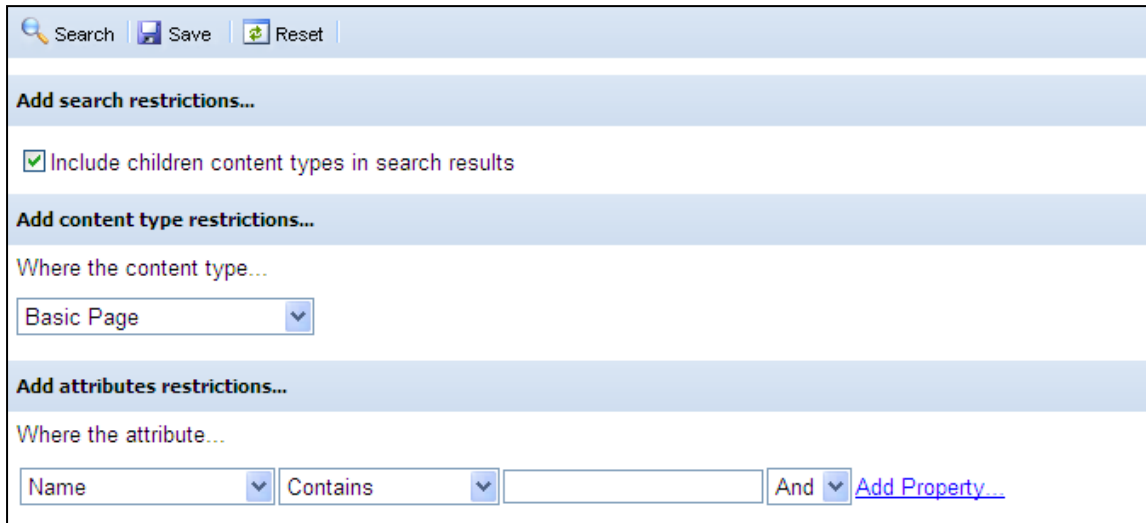
Search results will appear as a list of links. The user must click on the correspondent link to view the file or click Back to change the Search criteria.

Right click the document to view the Context Menu. Each action in the context menu is already explained in section [2.7.9 Document Services](#).

### 2.10.2.1 SITE EXPERT SEARCH

Site Expert Search searches documents using content types and attributes within the Site scope.

The user selects the root then clicks on **Expert Search** button  in the Search menu and the following search screen will open.



Search Save Reset

**Add search restrictions...**

Include children content types in search results

**Add content type restrictions...**

Where the content type...

Basic Page

**Add attributes restrictions...**

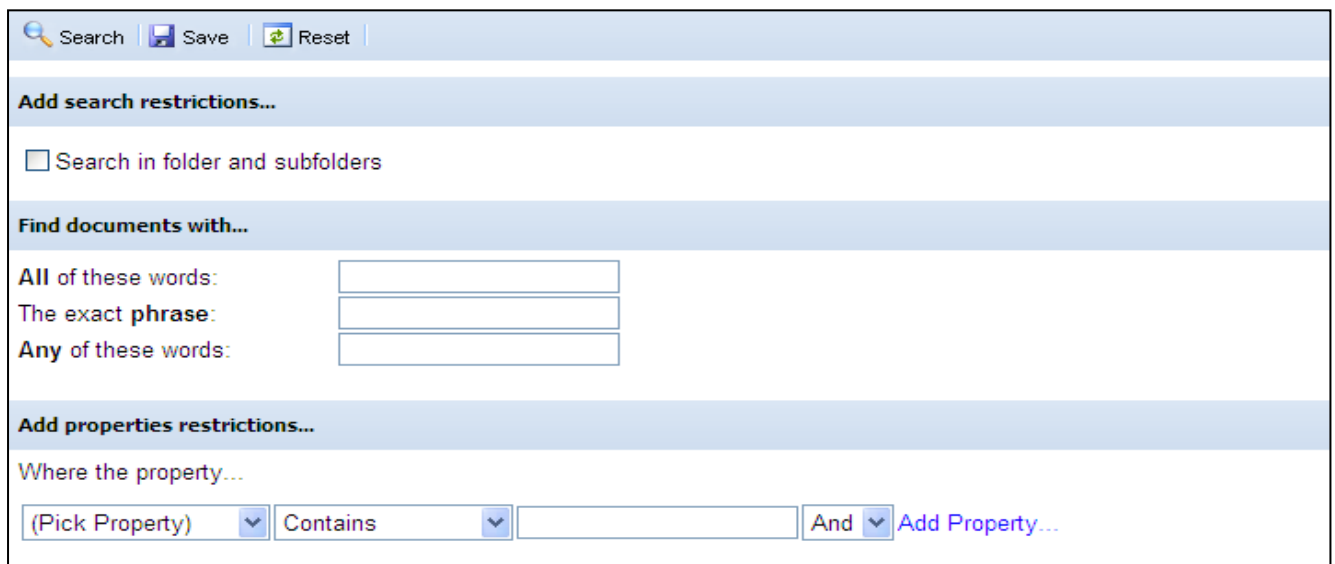
Where the attribute...

Name Contains And Add Property...

The manipulation is the same as explained above in Expert Search. The only exception is that the system will search automatically in folders and subfolders.

### 2.10.3 CONTENT SEARCH

The user selects a cabinet or a folder then clicks on **Content Search** button  Content Search in the Search menu and the search screen will open.



Search Save Reset

**Add search restrictions...**

Search in folder and subfolders

**Find documents with...**

All of these words:

The exact phrase:

Any of these words:

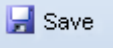
**Add properties restrictions...**

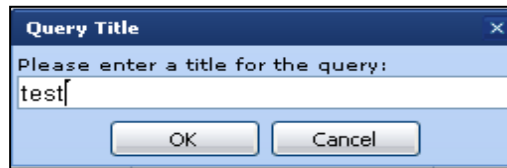
Where the property...

(Pick Property) Contains And Add Property...

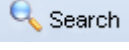
In order to search in folders and subfolders of the selected item, the user must check **Search in folder and subfolders** checkbox.

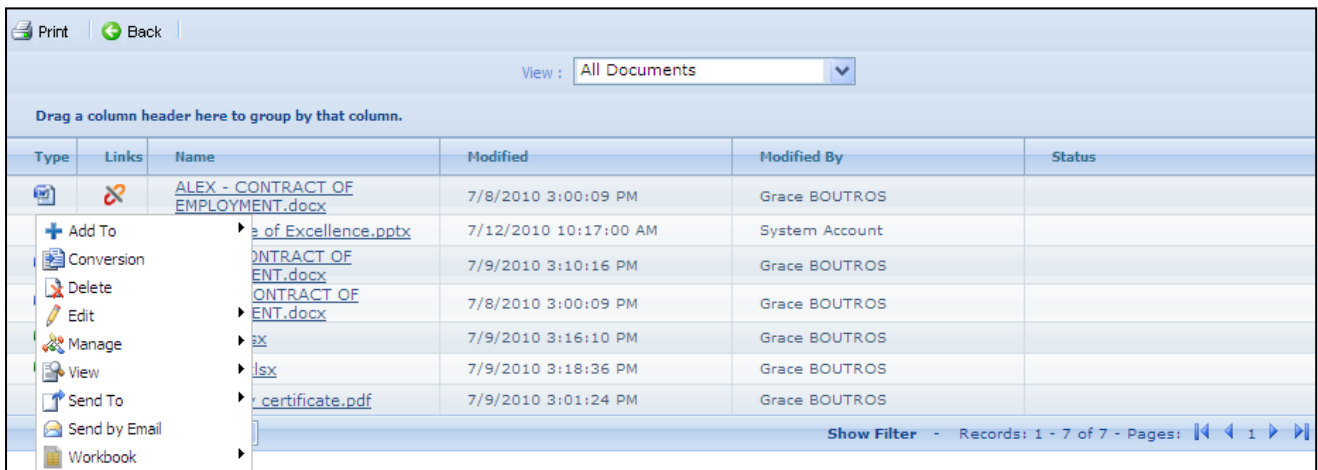
The user must enter the search criteria. He can use document properties for more advanced search, or click Add Properties to use more than one property in the search criteria.

- To save the search query, the user must click on the save icon  , and the following page will open.



The user must enter the title for the query then click OK. The chosen query will be added to the Saved Queries.

- To perform the search, the user clicks the “Search” button  on the toolbar, and the results will be listed as shown in the figure below.

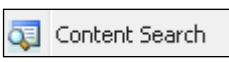


Search results will appear as a list of links. The user must click on the correspondent link to view the file or click Back to change the Search criteria.

Right click the document to view the Context Menu. Each action in the context menu is already explained in section [2.7.9 Document Services](#).

### 2.10.3.1 SITE CONTENT SEARCH

Site Content Search searches the content of the files within the Site scope.

- The user selects the root then clicks on **Content Search** button  in the Search menu and the following search screen will open.

Search Save Reset

**Add search restrictions...**

Search in subsites

**Find documents with...**

All of these words:

The exact phrase:

Any of these words:

**Add properties restrictions...**

Where the property...

(Pick Property)  Contains  And  [Add Property...](#)

To search in subsites, the user must check **Search in subsites** checkbox.

The manipulation is the same as explained above in Content Search. The only exception is that the system will search automatically in folders and subfolders.

Print Back

View : Default View

Drag a column header here to group by that column.

Type	Links	RANK(%)	Nom	Author	Created	Status
		100	1112222	ane TOUMA	12/05/2010 14:14:52	
		100	Abir.d	ir TARCHINI	12/05/2010 16:33:39	
		100	Abir.t	ir TARCHINI	12/05/2010 11:31:51	
		100	abirte	ir TARCHINI	12/05/2010 11:33:50	
		100	abirte	ir TARCHINI	12/05/2010 11:33:50	
		100	Copy	anet	06/11/2009 09:25:00	
		100	Copy	ane TOUMA	12/05/2010 11:30:05	
		100	CTS	roniqueb	26/06/2009 14:36:00	
		100	7712	ane TOUMA	11/05/2010 16:19:00	
		100	7712	ane TOUMA	11/05/2010 16:19:00	

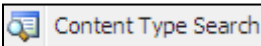
Records per page: 10 Show Filter - Records: 1 - 10 of 43 - Pages: 1 | 2 | 3 | 4 | 5

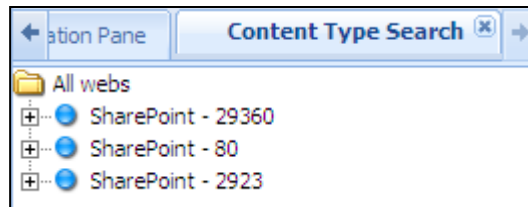
In search results, documents from the main site will appear as a list of links. The user must click on the correspondent link to view the file or click Back to change the Search criteria.

Right click the document to view the Context Menu. Each action in the context menu is already explained in section [2.7.9 Document Services](#).

Whereas, documents from sub sites will not appear as links. Then the user will not be able to view the files. He will only be able to view its Properties through the right click menu.

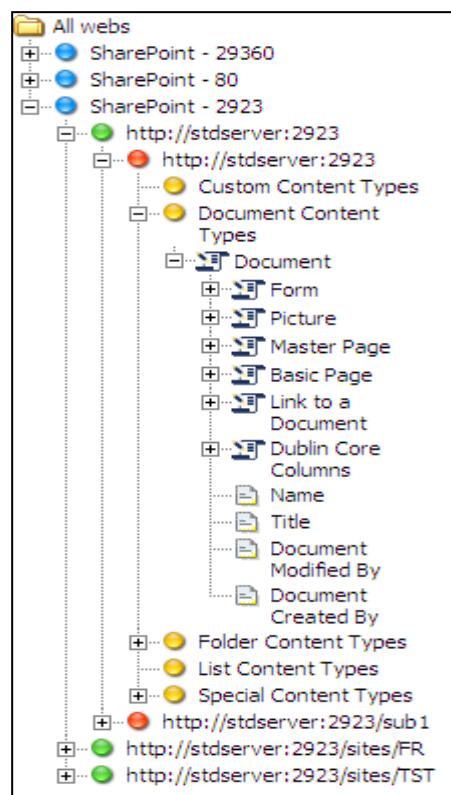
## 2.10.4 CONTENT TYPE SEARCH

Once the user clicks on **Content Type Search** button  in the Search menu, the following tree will open in the navigation pane.

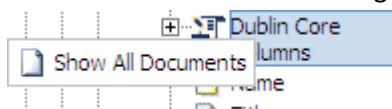


The user navigates throughout the Content Type Search tree and selects a specific content type to search for folders or documents. The user must:

1. Select a Web application
2. Select a Site Collection
3. Select a site or a sub site
4. Select a content type group (Document Content Types, Folder Content Types...)
5. Select a parent Content Type
6. Select a field to search accordingly



➤ To view all documents having the selected content type, the user right clicks a content type



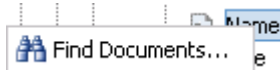
then click on Show All Documents. The following page will open.

Type	Name	Modified By	Modified
	<a href="#">Karim THOMAS01071011...</a>	Grace BOUTROS	7/5/2010
	<a href="#">Karim THOMAS01071010...</a>	Grace BOUTROS	7/5/2010
	<a href="#">University certifica...</a>	Jihane TOUMA	7/5/2010
	<a href="#">Employment Applicati...</a>	Jihane TOUMA	7/5/2010
	<a href="#">ALEX - CONTRACT OF E...</a>	Jihane TOUMA	7/5/2010
	<a href="#">JANE - CONTRACT OF E...</a>	Jihane TOUMA	7/5/2010
	<a href="#">MARK - CONTRACT OF E...</a>	Jihane TOUMA	7/5/2010
	<a href="#">To whom it may conce...</a>	Jihane TOUMA	7/5/2010
	<a href="#">Jihane TOUMA05071010...</a>	Grace BOUTROS	7/5/2010
	<a href="#">Bernadette HAKMEH010...</a>	Karim THOMAS	7/5/2010

Records per page: 10 | Records: 1 - 10 of 18 - Pages: 1 | 2

The user can only view documents by clicking on the correspondent link.

- To search for documents according to the selected field, the user right clicks a field



then click on Find Documents button. The following page will open.


**Search documents** [X]

Search [Reset]

---

**Find Documents with any of these words**

Name

The user enters his search criteria then click on  button. The results will be listed as shown below.

Search [Reset]

---

**Find documents with...**

Name

---

**Search Results**

Type	Name	Modified By	Modified
	<a href="#">ALEX - CONTRACT OF E...</a>	Jihane TOUMA	7/5/2010
	<a href="#">JANE - CONTRACT OF E...</a>	Jihane TOUMA	7/5/2010
	<a href="#">MARK - CONTRACT OF E...</a>	Jihane TOUMA	7/5/2010

Records per page: 10 | Records: 1 - 3 of 3 - Pages: 1 | 2

The user can only view documents by clicking on the correspondent link.

### 2.10.5 GENERATE SOLO - SEARCH

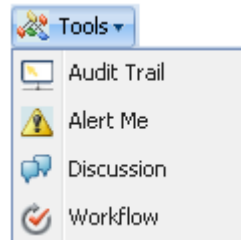
Generate Solo Search will be explained in details further in the Manual Course.

Refer to section [2.12.2 Generate Solo](#) for detailed instructions.



## 2.11 TOOLS MENU


The menu “**Tools**” visible in the user Top Navigation Menu allows the user to manage tools:



This menu is divided into the following sub-menus:

- Audit Trail
- Alert Me
- Discussion
- Workflow

### 2.11.1 AUDIT TRAIL

To view the Audit Trail of a selected Cabinet, Folder or Document, the user selects a folder or a cabinet from the tree or a document from the grid then clicks the “**Audit Trail**” button  in the tools menu. He/she will be presented with a new window showing the audit trail in the selected cabinet, folder or document as shown below.

Use this form to view the audit and trail for the cabinet salma cab1- overwrite.

Action Type:  User:    
 Action From Date:  Action To Date:

Audit Results  Search in folder and subfolders

	Event	Occurred	User	Object
	View	10/20/2009 07:00	NT AUTHORITY\local service	salma cab1 overwrite/1Testing minimize.docx
	View	10/20/2009 07:00	NT AUTHORITY\local service	salma cab1 overwrite
	View	10/20/2009 07:00	NT AUTHORITY\local service	salma cab1 overwrite/1Testing minimize.docx
	View	10/20/2009 07:00	NT AUTHORITY\local service	salma cab1 overwrite
	Update	10/20/2009 07:00	STD\Administrator	salma cab1 overwrite/1Testing minimize.docx
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite/1Testing minimize.docx
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite/gdfzgf.f.docx
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite/gdfzgf.f.docx
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite/1Testing minimize.docx
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite/1fgdfghdf.doc
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite
	Update	10/19/2009 04:00	STD\Administrator	salma cab1 overwrite/1Testing minimize.docx
	Update	10/19/2009 04:00	STD\Administrator	salma cab1 overwrite/gdfzgf.f.docx
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite/1Testing minimize.docx
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite/1fgdfghdf.doc
	View	10/19/2009 04:00	NT AUTHORITY\local service	salma cab1 overwrite

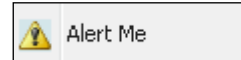
Page 1 of 65 1 - 25 of 1617

This grid displays the modifications that occurred on the selected cabinet and its documents or the selected folder and its documents or the selected document (including routes in all cases).

The upper frame of the window allows the user to filter Audit results according to the criteria entered.

Routes will appear in filter results only when the Action Type is **Route Actions**.

## 2.11.2 ALERT ME



The user selects a cabinet/folder/document(s) then clicks on **Alert Me** button in the Tools menu. The following page will open allowing him to add/edit/delete an e-mail alert notifying him when changes occur to the selected cabinet/folder/document(s).

The user Alerts will be listed in a grid, in the bottom of the page.

Created Alerts could be assigned either to the connected user (creator) or to any other user.

Alert Me X
Submit X Cancel

Use this page to create an e-mail alert notifying you when there are changes to the List : EDIT TESTING

<p><b>Alert Title:</b> Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.&gt;</p>	<input style="width: 95%;" type="text"/>
<p><b>Send Alert To:</b> You can enter user names or e-mail addresses. Separate them with semicolons.</p>	<input style="width: 95%;" type="text" value="Salma Jaber"/>
<p><b>Send Alerts For These Changes:</b> Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.</p>	<input checked="" type="checkbox"/> Anything changes <input type="checkbox"/> Someone else changes a document <input type="checkbox"/> Someone else changes a document created by me <input type="checkbox"/> Someone else changes a document last modified by me
<p><b>When To Send Alerts</b> Specify how frequently you want to be alerted.</p>	<input checked="" type="checkbox"/> Send e-mail immediately <input type="checkbox"/> Send a daily summary <input type="checkbox"/> Send a weekly summary
<p><b>Change Type:</b> Specify the type of changes that you want to be alerted to.</p>	<input checked="" type="checkbox"/> All changes <input type="checkbox"/> New items are added <input type="checkbox"/> Existing items are modified <input type="checkbox"/> Items are deleted <input type="checkbox"/> Web discussion updates


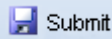

Drag a column header here to group by that column.

Alert Title	Name	Edit	Delete
my alert	EDIT TESTING	Edit	Delete
analysis1	analysis	Edit	Delete

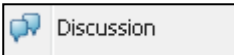
Records per page:  Records: 1 - 2 of 2 - Pages:

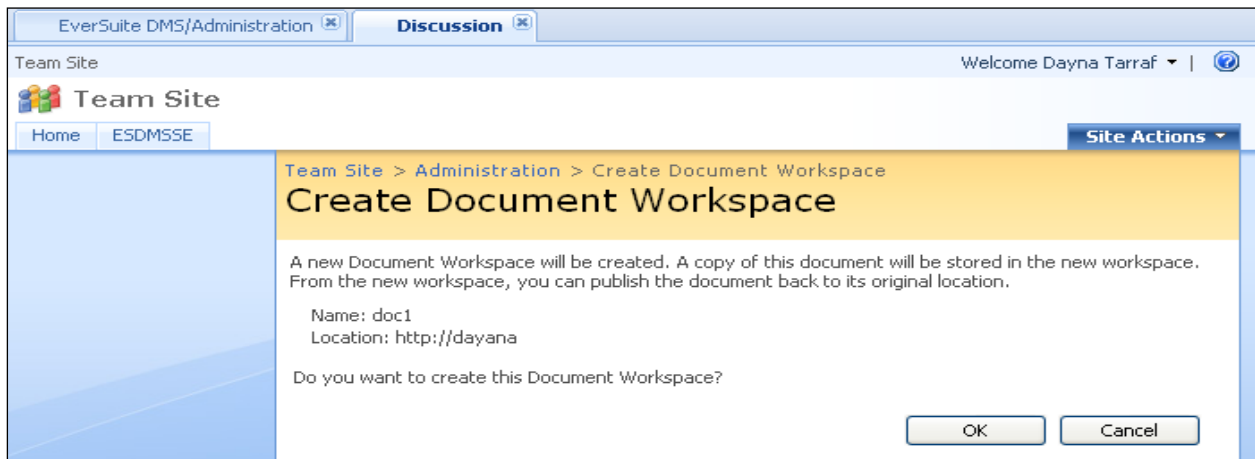
- To add a new Alert, The user simply needs to fill in the input fields and then click the **“Submit”** button



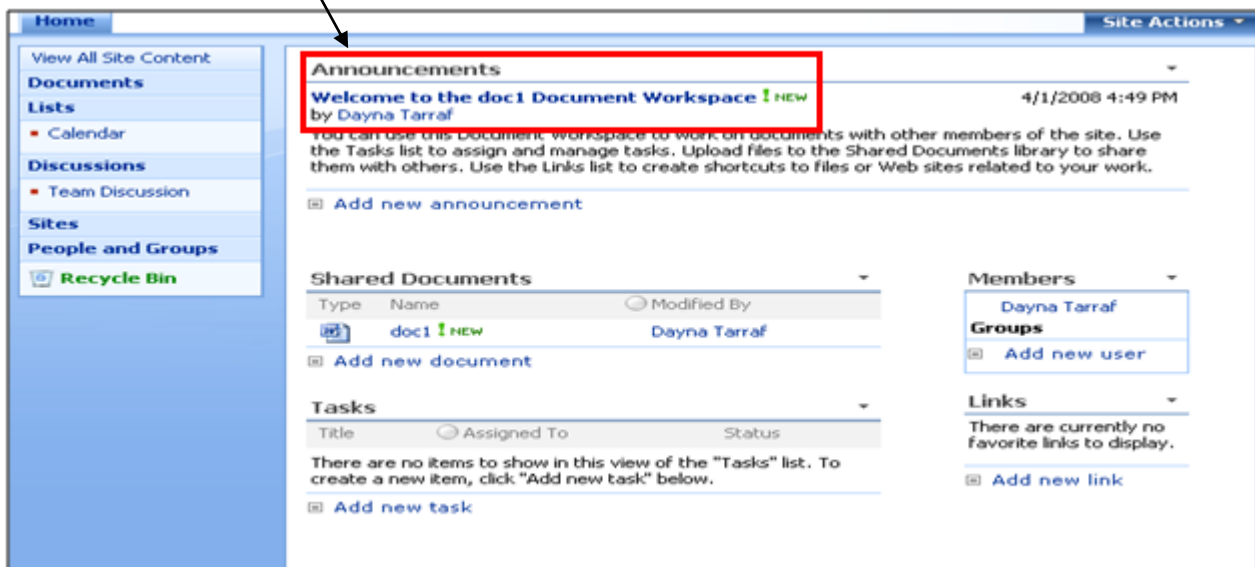
- To edit an Alert, the user simply selects the record he/she wants to edit then click on the Edit button  listed on the same row as the target Alert. The screen will show the same fields used for insertion, but this time they will be filled with their existing values. The user must make the necessary changes then click on **Submit** button .
- To delete an Alert, user must click on the Delete button  listed on the same row as the target Alert. The Alert will be immediately deleted and removed from the alerts list.

### 2.11.3 DISCUSSION

To create a new Workspace for a selected document, the user must select a folder or a cabinet then click on **Discussion** button  in **Tools** menu. The following page will open:



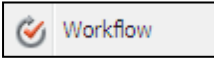
A New Document Workspace (Site) will be created for the selected Document.



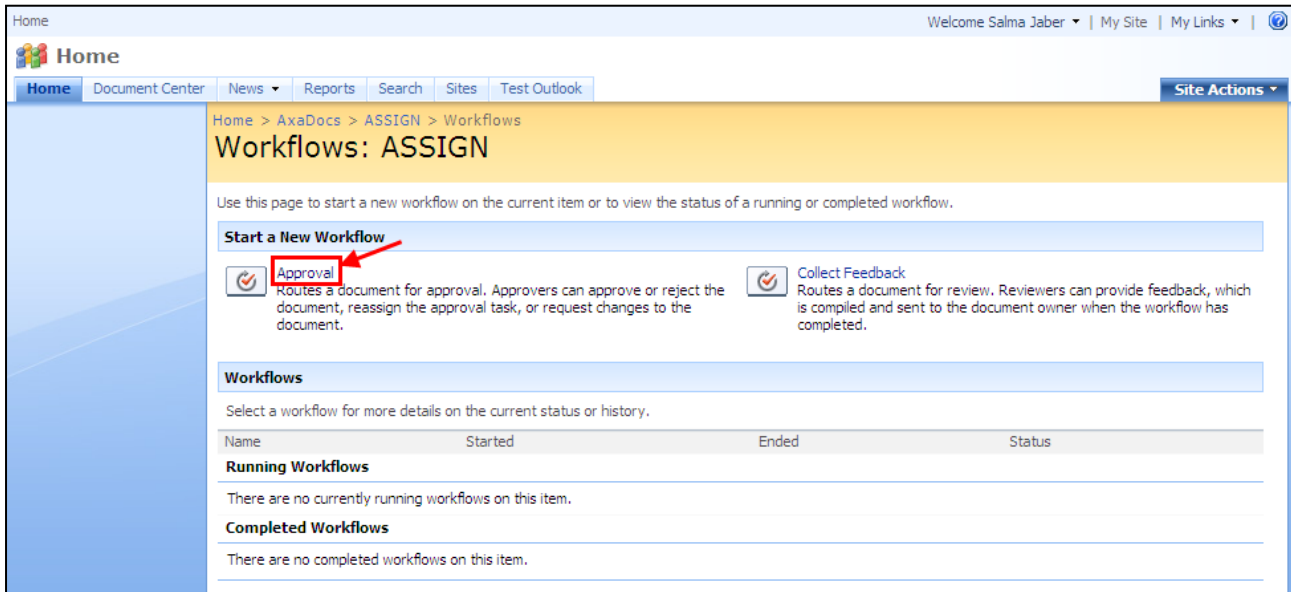
The user can use this document Workspace to work on documents with other members of the site. Use the tasks list to assign and manage tasks. Upload files to the Shared cabinets to share them with others. Use the Links list to create shortcuts to files or web sites related to his work.

## 2.11.4 WORKFLOW

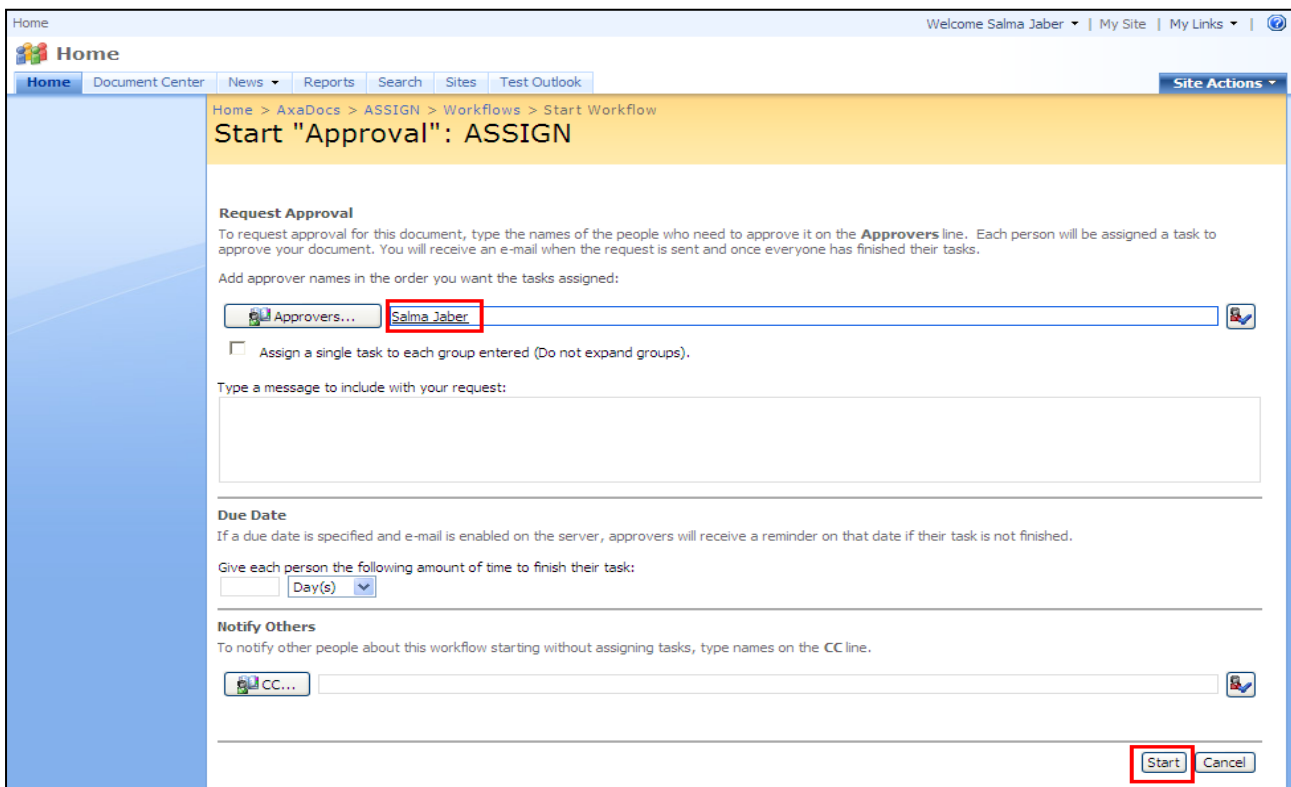
To start a new workflow on the selected document or to view a running or completed workflow, click on



, the following page will open:



The user must click on Approval as shown above to send a document for approval. The following page will open.

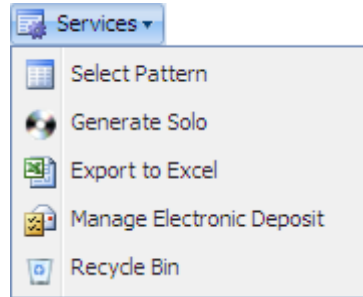


The user must type the names of the people who need to approve on the **Approvers** line, fill in the needed criteria, and then click on Start button to start a workflow.

A single task will be assigned to each one of the approvers entered. It will appear in “**My Tasks**”.

## 2.12 SERVICES MENU

The menu “Services” visible in the user Top Navigation Menu allows the user to manage services.

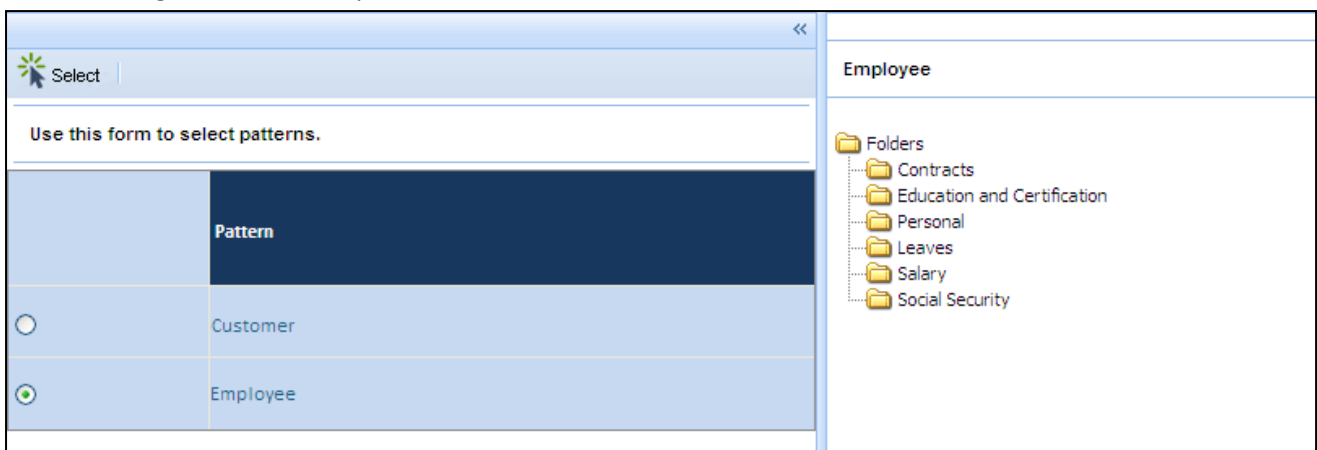


This menu is divided into the following sub-menus:

- **Select Pattern:** selects a Pattern to be added to Folders or Cabinets.
  - Patterns are folder structures, created by the administrator, which users can select to add under a Folder or Cabinet instead of creating the same Folder structure each time.
- **Generate Solo:** generates a Document tree of the selected Folder or Cabinet that can be explored outside ES-DMS.
- **Export to Excel:** displays in an excel sheet a list of all the Documents in the selected Folder or Cabinet.
- **Manage Electronic Deposit:** used to manage the electronic deposit.
- **Recycle Bin:** used to manage deleted items.

### 2.12.1 SELECT PATTERN

To select a pattern, the user must select a folder or a cabinet from the tree in the navigation pane, then press the **Select Pattern** in Services menu, and the following page will open. The user will be presented with a new form allowing him to select a pattern as shown below.



The screenshot shows a web interface for selecting a pattern. On the left, there is a form with a "Select" button and the instruction "Use this form to select patterns." Below this is a table with a header "Pattern" and two rows: "Customer" and "Employee". The "Employee" row is selected, indicated by a green radio button. On the right, there is a navigation pane titled "Employee" showing a tree structure of folders: "Contracts", "Education and Certification", "Personal", "Leaves", "Salary", and "Social Security".



The user must select a pattern then click Select, and the selected pattern will appear in the right pane.

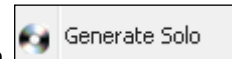
## 2.12.2 GENERATE SOLO

Generate Solo will export the selected Folder or Cabinet with all its subfolders and files to a Zip Folder on a specified location.

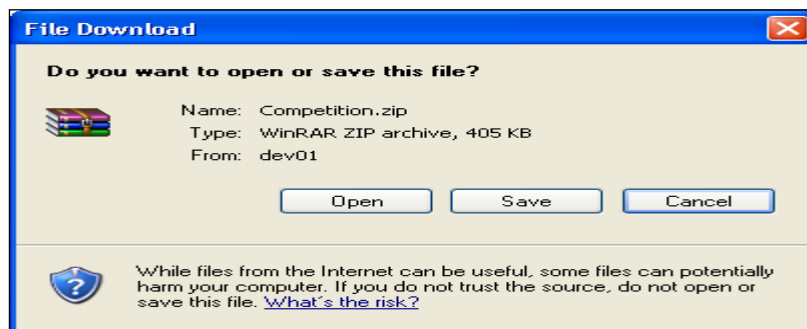
You can explore and search the contents of the exported zipped Folder without the use of the ES-DMS application.

Users will be able to:

- Explore the Folder, its subfolders and files from any browser without ES-DMS being installed.
- Search the contents of the Folder's files.



The user selects a folder or a cabinet then clicks on **Generate Solo** button in the services menu. The following page will open

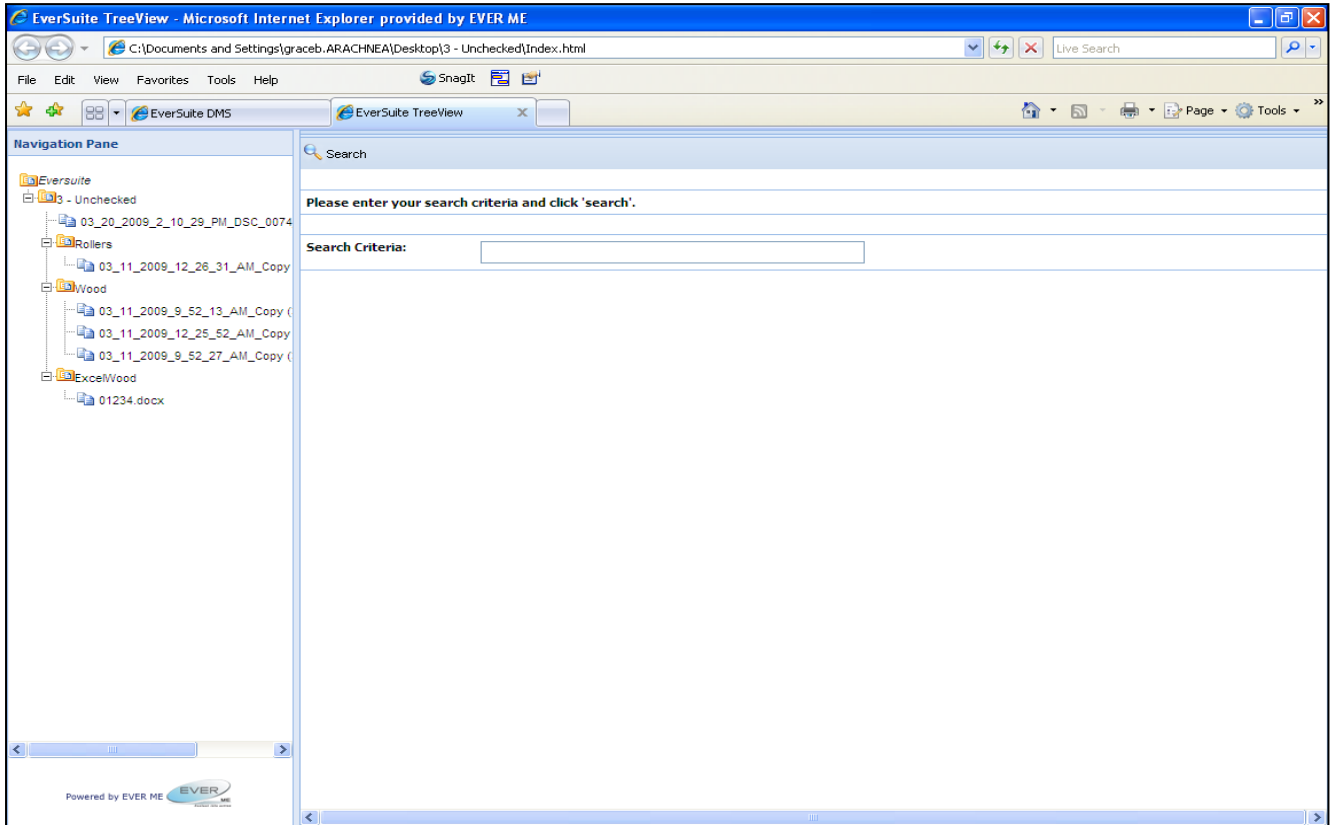


The user must click Save, to save the Zip Folder in a specified location.



In addition to all the subfolders and files contained in the zipped folder, there is an Index.html file .

Once the user clicks on it the following page will open.



The Project Tree View will appear in the same structure as in the ES-DMS Tree View Frame.

The Search Option allows the user to search the content of the Files. The user must enter his search criteria then click on **Search** button. The search results will appear in Search frame as a list of links.

Search results are files that contain the Search Keyword in their title or in their content. Once the user clicks on the displayed hyperlink, the file will open.

[We search a panel of **more than 20 leading car insurance providers** to find the best **car insurance** policy for you.

Whether you require [Comprehensive](#) cover, [Third Party, Fire and Theft](#) or a [Third Party Only car insurance](#) policy, you can be sure we'll do all we can to find you a very competitive online quote and **cheaper car insurance premiums** with [yesinsurance.co.uk](#).

If your **car** is five years old or more, congratulations! You could qualify for even cheaper **car insurance** premiums, as [yesinsurance.co.uk](#) specialises in insurance for older **cars**. This keeps our costs down, because in the event of a claim our customers' **cars** cost less to replace and repair than new ones, so we can pass the savings on to you as cheaper **car insurance**.

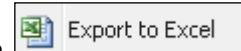
We also have great insurance deals for low mileage drivers and second **cars** because they offer a lower risk of accident as they are on the road less.

We offer a range of payment options to make paying for your **car insurance** easy - you can pay by direct debit, credit **card** or debit **card** and in an annual lump sum or [monthly instalments](#) (subject to status). All types of payment can be arranged online or over the phone.

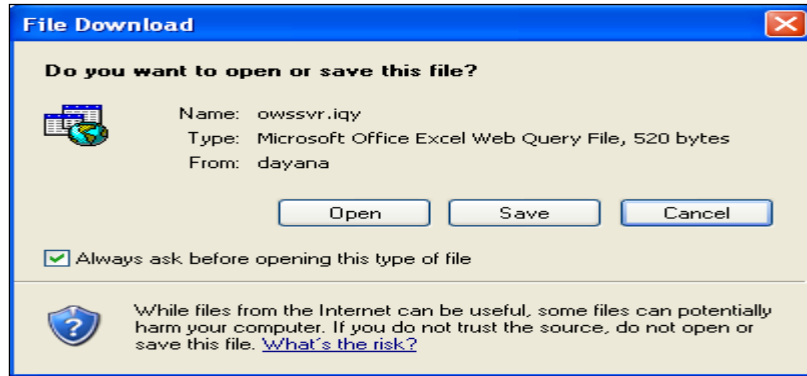
We search a panel of **more than 20 leading car insurance providers** to find the best **car insurance** policy for you.

### 2.12.3 EXPORT TO EXCEL

The user selects a folder or a cabinet then clicks on “**Export to Excel**” button



in Services menu. The following page will open.



The Excel File displays a list of all the documents of the selected Folder or Cabinet:

- Columns
  - **Name:** the name of the document
  - **Modified:** date of the last modification
  - **Modified By:** the user that did the last modification
  - **Item Type:** document type
  - **Path:** document path in the Tree View
- Rows
  - Selected Cabinet or Folder
  - All Subfolders
  - Documents of the Folders and Subfolders

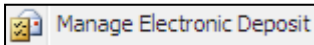
	A	B	C	D	E
1	Name	Modified	Modified By	Item Type	Path
2	<a href="#">f1</a>	30/07/2008 13:49	DAYANA\administrator	Folder	Health and Safety
3	<a href="#">f2</a>	30/07/2008 13:49	DAYANA\administrator	Folder	Health and Safety
4	<a href="#">fa</a>	30/07/2008 13:49	DAYANA\administrator	Folder	Health and Safety/f1
5	<a href="#">fb</a>	30/07/2008 13:49	DAYANA\administrator	Folder	Health and Safety/f1
6	<a href="#">Finance</a>	04/03/2008 17:53	System Account	Folder	Health and Safety

The user must click on the correspondent link to open the Document, Folder or Cabinet.

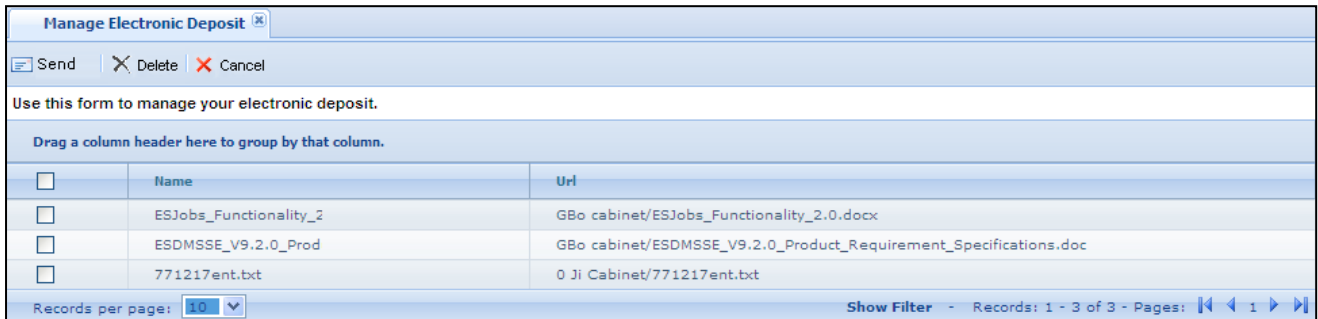


## 2.12.4 MANAGE ELECTRONIC DEPOSIT

The user selects a folder or a cabinet then clicks on “**Manage Electronic Deposit**” button



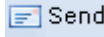
in Services menu. The following page will open allowing him to manage his electronic deposit.

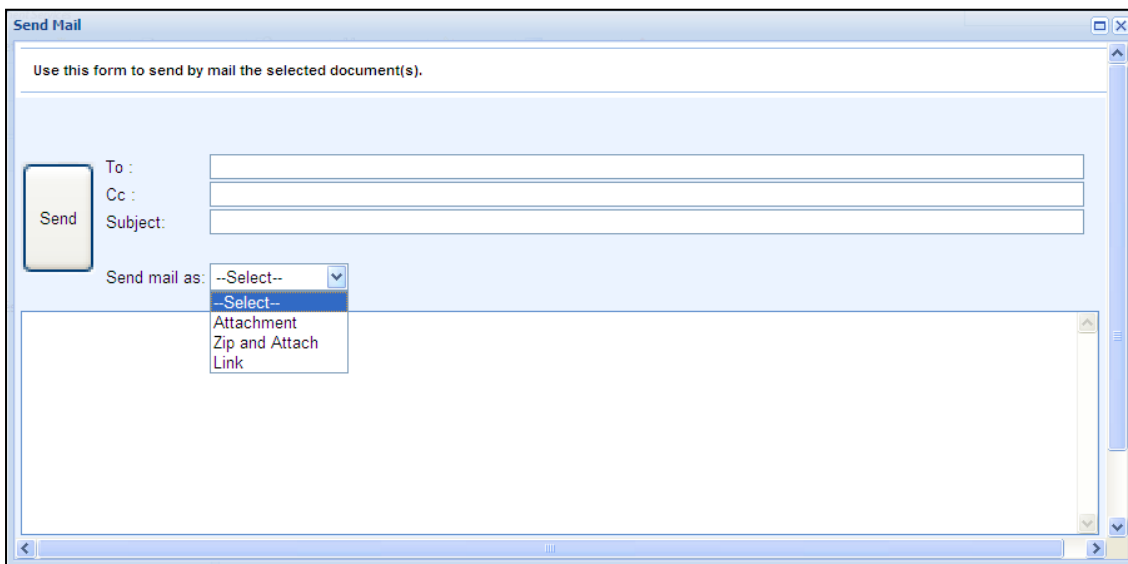


<input type="checkbox"/>	Name	Url
<input type="checkbox"/>	ESJobs_Functionality_2	GBo cabinet/ESJobs_Functionality_2.0.docx
<input type="checkbox"/>	ESDMSSE_V9.2.0_Prod	GBo cabinet/ESDMSSE_V9.2.0_Product_Requirement_Specifications.doc
<input type="checkbox"/>	771217ent.txt	0 Ji Cabinet/771217ent.txt

Records per page: 10 Show Filter - Records: 1 - 3 of 3 - Pages: 1

This page allows the user to delete documents, and/or send documents by mail.

To send a document by mail, the user must select a document then click on  **Send** button. Following page will open.



Use this form to send by mail the selected document(s).

To :  
Cc :  
Subject :

Send

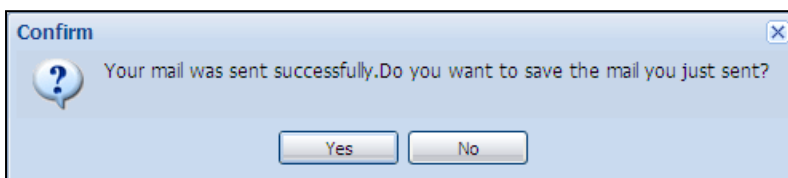
Send mail as: --Select--

- Select--
- Attachment
- Zip and Attach
- Link

The user must enter the Email addresses and the subject of the email, and then choose to send the selected files as:

- **Attachments or Zip and Attach:** the document will be sent as attachment along with the link in the email body
- **Link:** the document will be sent as link in the mail body

Upon clicking on **Send** the following confirmation message will open asking the user if he wants to save the mail he just sent.

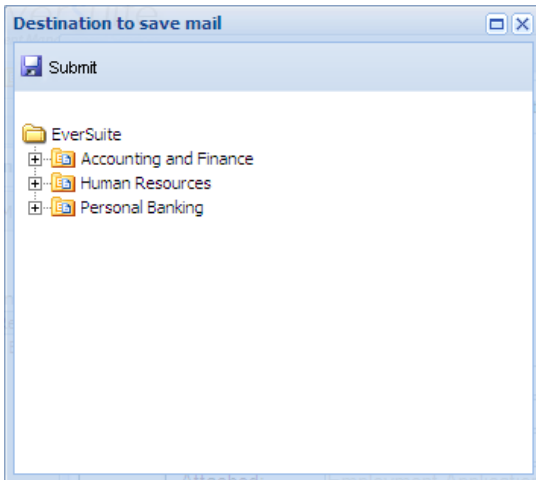


**Confirm**

Your mail was sent successfully. Do you want to save the mail you just sent?

Yes No

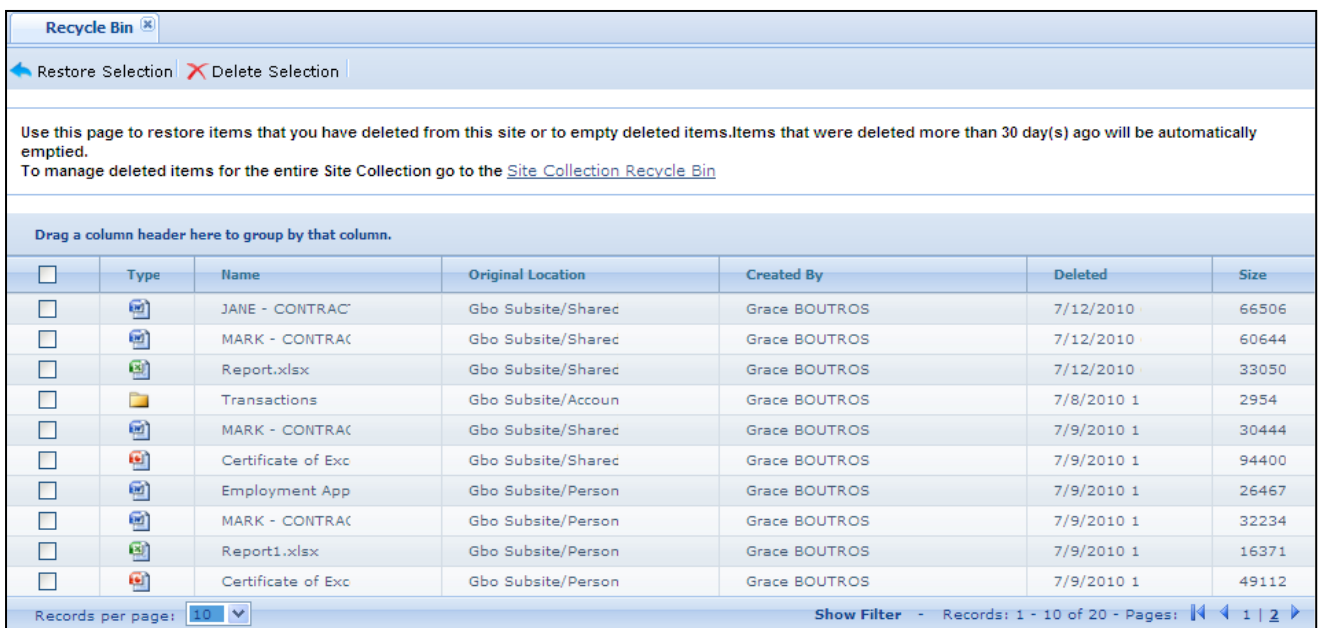
In case the user wants to save the mail, the following window will open showing the destinations to save the mail.



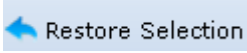
The user must select a destination folder of cabinet then click on submit to save the mail.

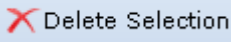
## 2.12.5 RECYCLE BIN

- Any Content Object deleted by users will not be entirely deleted from the system; it will be marked for deletion inside the Solution's Recycle Bin.
- The Recycle Bin holds all the users' deleted Items. Only administrators or users with specific privileges can access the Recycle Bin.
- Objects in the Recycle Bin can either be restored to their original location or deleted permanently from the system.

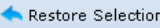
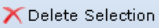
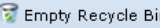













<input type="checkbox"/>	Type	Name	Original Location	Created By	Deleted	Size
<input type="checkbox"/>		JANE - CONTRAC	Gbo Subsite/Sharec	Grace BOUTROS	7/12/2010	66506
<input type="checkbox"/>		MARK - CONTRAC	Gbo Subsite/Sharec	Grace BOUTROS	7/12/2010	60644
<input type="checkbox"/>		Report.xlsx	Gbo Subsite/Sharec	Grace BOUTROS	7/12/2010	33050
<input type="checkbox"/>		Transactions	Gbo Subsite/Accoun	Grace BOUTROS	7/8/2010 1	2954
<input type="checkbox"/>		MARK - CONTRAC	Gbo Subsite/Sharec	Grace BOUTROS	7/9/2010 1	30444
<input type="checkbox"/>		Certificate of Exc	Gbo Subsite/Sharec	Grace BOUTROS	7/9/2010 1	94400
<input type="checkbox"/>		Employment App	Gbo Subsite/Person	Grace BOUTROS	7/9/2010 1	26467
<input type="checkbox"/>		MARK - CONTRAC	Gbo Subsite/Person	Grace BOUTROS	7/9/2010 1	32234
<input type="checkbox"/>		Report1.xlsx	Gbo Subsite/Person	Grace BOUTROS	7/9/2010 1	16371
<input type="checkbox"/>		Certificate of Exc	Gbo Subsite/Person	Grace BOUTROS	7/9/2010 1	49112

The user will be able to restore items already deleted from the current site. He must select an item then click on  button to restore the selected item.

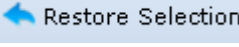
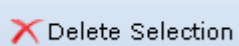
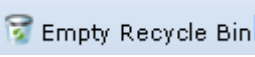

To delete an item the user must click on . Items that were deleted more than 30 days ago will be automatically emptied.

To manage deleted items for the entire Site Collection click on [Site Collection Recycle Bin](#) the following page will open showing the deleted items of the whole site collection.

   							
Use this page to restore items that you have deleted from this site or to empty deleted items. Items that were deleted more than 30 day(s) ago will be automatically emptied.							
Drag a column header here to group by that column.							
<input type="checkbox"/>	Type	Name	Original Location	Deleted By	Created By	Deleted	Size
<input type="checkbox"/>		CabinetsAlligner	JI Cabinet UploadM	EVER-ME\gbo	Grace BOUTROS	6/25/2010	14487
<input type="checkbox"/>		ColumnsTitle3.JF	JI Cabinet UploadM	EVER-ME\gbo	Jihane TOUMA	6/25/2010	10093
<input type="checkbox"/>		check later des u	JI Cabinet UploadM	EVER-ME\gbo	Grace BOUTROS	6/25/2010	64804
<input type="checkbox"/>		ColumnsTitle.JPG	JI Cabinet UploadM	EVER-ME\gbo	Ranwa ELRAHBANI	6/25/2010	16371
<input type="checkbox"/>		DMS55.txt	JI Cabinet UploadM	EVER-ME\gbo	Grace BOUTROS	6/25/2010	760
<input type="checkbox"/>		DocumentCenter	JI Cabinet UploadM	EVER-ME\gbo	Grace BOUTROS	6/25/2010	12217
<input type="checkbox"/>		ErrorOnDeleteVer	JI Cabinet UploadM	EVER-ME\gbo	Jihane TOUMA	6/25/2010	14758
<input type="checkbox"/>		ErrorMessageOn/	JI Cabinet UploadM	EVER-ME\gbo	Grace BOUTROS	6/25/2010	11556
<input type="checkbox"/>		ErrorMessageOn\	JI Cabinet UploadM	EVER-ME\gbo	Grace BOUTROS	6/25/2010	37093
<input type="checkbox"/>		ErrorInMyFolders.	JI Cabinet UploadM	EVER-ME\gbo	Grace BOUTROS	6/25/2010	13375

Records per page:  Show Filter - Records: 1 - 10 of 440 - Pages: [1](#) | [2](#) | [3](#) | [4](#) | [5](#)

The user selects an item(s) the click on:

-  to restore the selected item in its original location.
-  to delete the selected item
-  to empty the whole recycle bin
-  to go back to the previous page


The user will be able to restore deleted items, delete items and empty recycle bin.

## 3. ENABLING

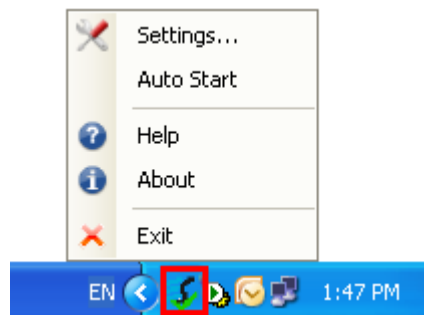
### 3.1 CLIENT INTEGRATION APPLICATION

The ES-DES Integrator application is a small application that will be installed on client machine to enable the identification of application and text highlighting by users.

The user will be able to select a text from an application UI and press a predefined shortcut key on his keyboard in order for the client integration application to identify the required information and open an Internet Explorer instance displaying the Document Enabling Services; ES-DES Document Manager.

The ES-DES Integrator application can be run at windows startup and will be present and visible only in the Windows taskbar. The icon  will have a context menu comprising the following menus:

1. **Settings:** ES-DES settings (Storage and Application Settings)
2. **Auto start:** to disable/enable the application to start on windows startup.
3. **Help:** a help document and user guide to use the integration services and their features
4. **About:** open the About form.
5. **Exit:** allows the user to exit and close the integration application

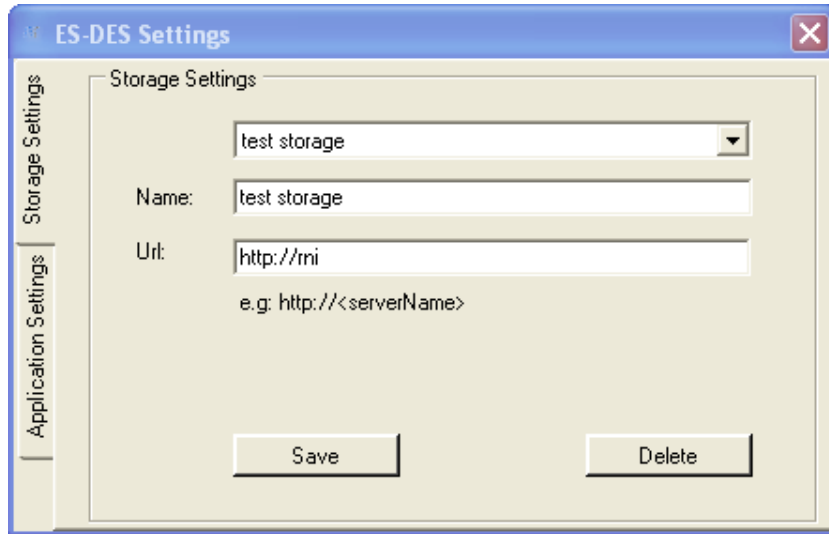


#### 3.1.1 SETTINGS

The settings window is divided into two tabs:

- **Storage Settings:** define different storage destination (server on which the ES-DES server application is installed)
- **Application Settings:** define the process that will activate Document enabling.

### 3.1.1.1 STORAGE SETTINGS



The interface above displays the available Storage Settings. It allows the user to add a new storage, edit or delete an existing one.

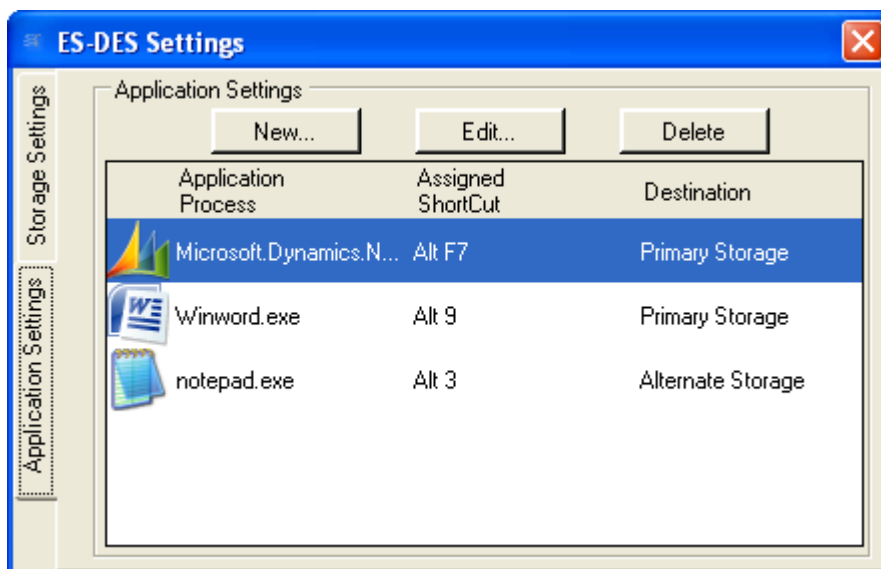
The name is a description to identify one storage setting from the other; the URL is the server name/location where ES-DES server application is installed and running.

### 3.1.1.2 APPLICATION SETTINGS

The Application Settings section is where applications can be added to the ES-DES Integrator to activate Document Enabling on those applications.

There is no limitation on the applications that can be added here or the number of applications to add.

Any application installed on the Machine can be added in this section. Each application will have one shortcut key assigned to it and one destination storage.



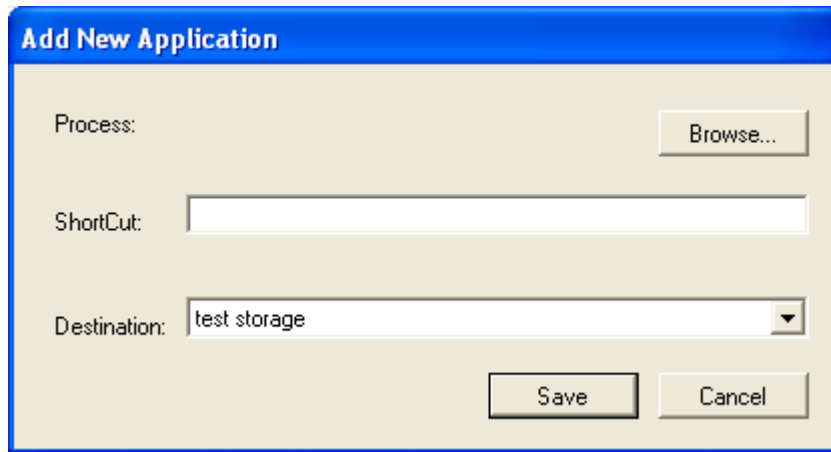
The interface above displays the different application settings

**Application process:** process where the data will be captured from

**The Assigned Shortcut:** shortcut used to trigger the capture and send data events

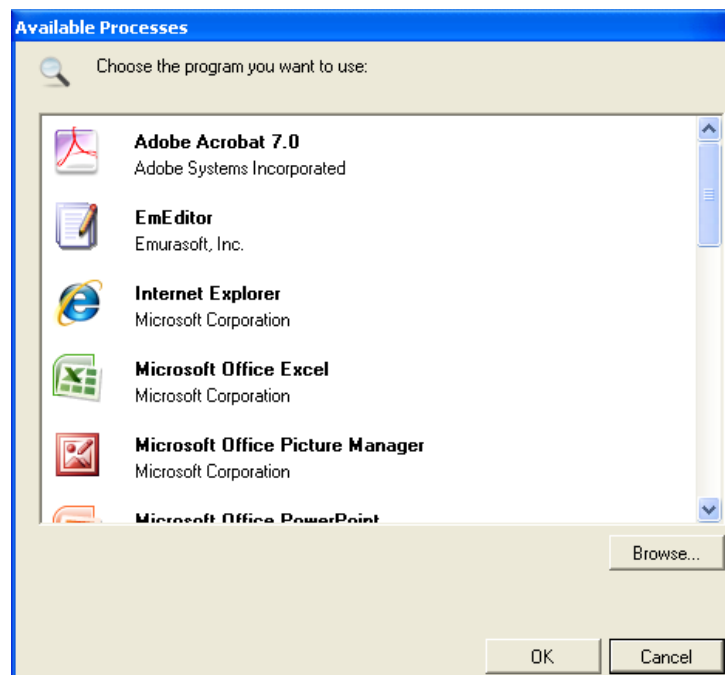
**Destination:** the storage setting associated with the selected process.

- To add a new application, the user must click on **New...** button on top of the window. The following **Add New Application** page will open:






The user must follow the following steps:

1. Browse for a process from the available processes by clicking on **Browse...** button



2. Select a process then click on OK
3. Enter the shortcut identifiers of the application (ex: Shift F1, CTRL 3...)
4. Select the Destination
5. Click on **Save** to save the application or on **Cancel** to cancel the operation.

Editing an application is as easy as adding a new one. The user must select an application then click on  button. The same page will open but this time in edit mode. Add the necessary modifications then click on  button to save the changes.

➤ To delete an application the user must select the application he wants to delete then click on  button.

## 3.2 ES-DES DOCUMENT MANAGER

The ES-DES Document Manager is a web form instantiated by the ES-DES Integrator.

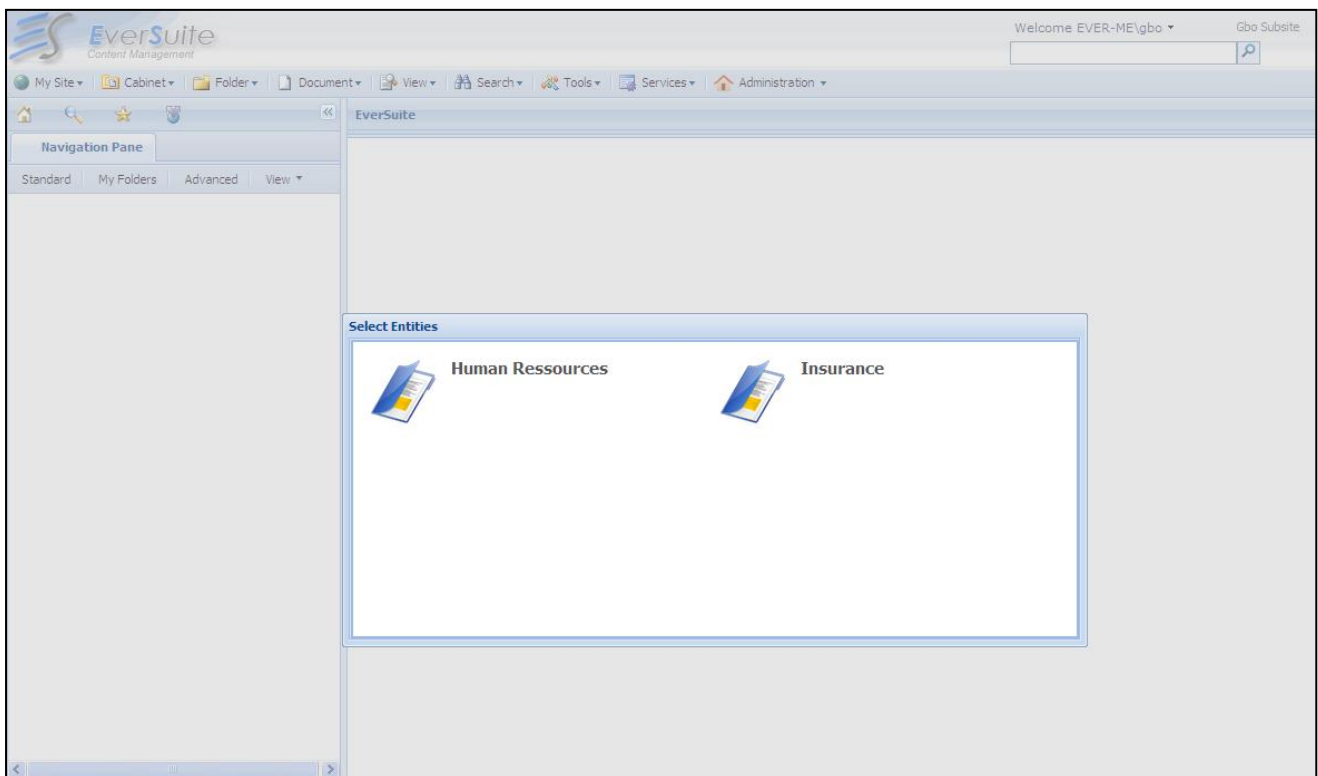
Its main purpose is to validate the information sent against the existing entities, create the appropriate filing plan and display the existing documents to the user. It is also the main application to add documents and metadata.

When the user activates ES-DES for an application (for example NAV), the client integration application will open a new IE instance with the below interface.

The interface below, will display all integration entities configured in ES-DES Administrator and matching the selected criteria (Business application, Business form and Business URL).

In case only one entity meets the criteria, the window below will be skipped.

The user will select the desired entity and will be directed to the correct Mapping of documents.

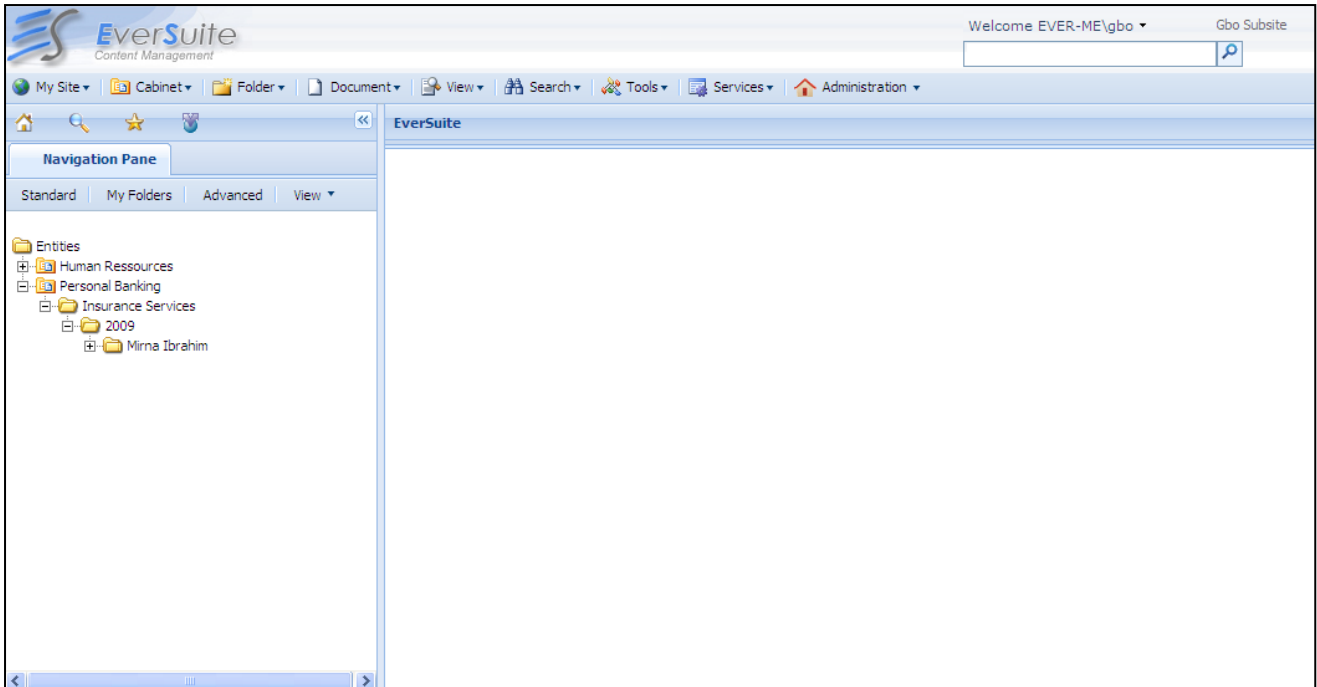


Once the user selects a value and initiates DES (through pressing the HotKey), the selected value is compared to the Primary Key as defined in Entities – Data tab.

If the selected value exists only once under either the “Primary Key” then the value is loaded into ES-DES as follows:

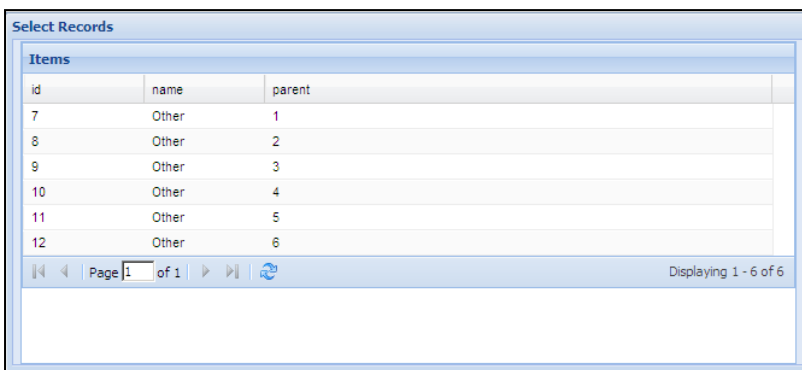
ES-DES adds folders as per the filing plan configuration

Patterns are created beneath the user’s selected value



If the selected value exists multiple times under the “Primary Key” then the value is loaded into ES-DES as follows:

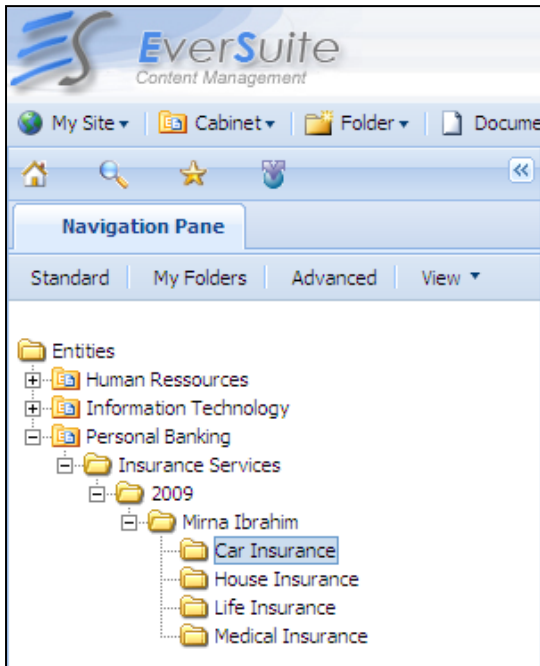
User is prompted to select one record to proceed



ES-DES adds folders as per the filing plan configuration

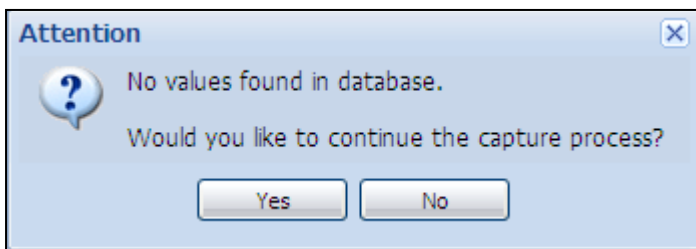
Patterns are created beneath the user’s selected value



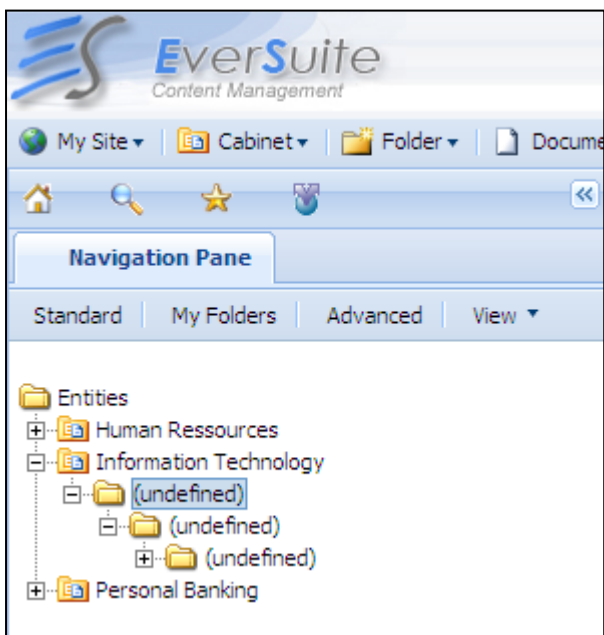


If the selected value does not exist under the “Primary Key” then the value is loaded into ES-DES as follows:

User is prompted whether to continue with the folder creation operation

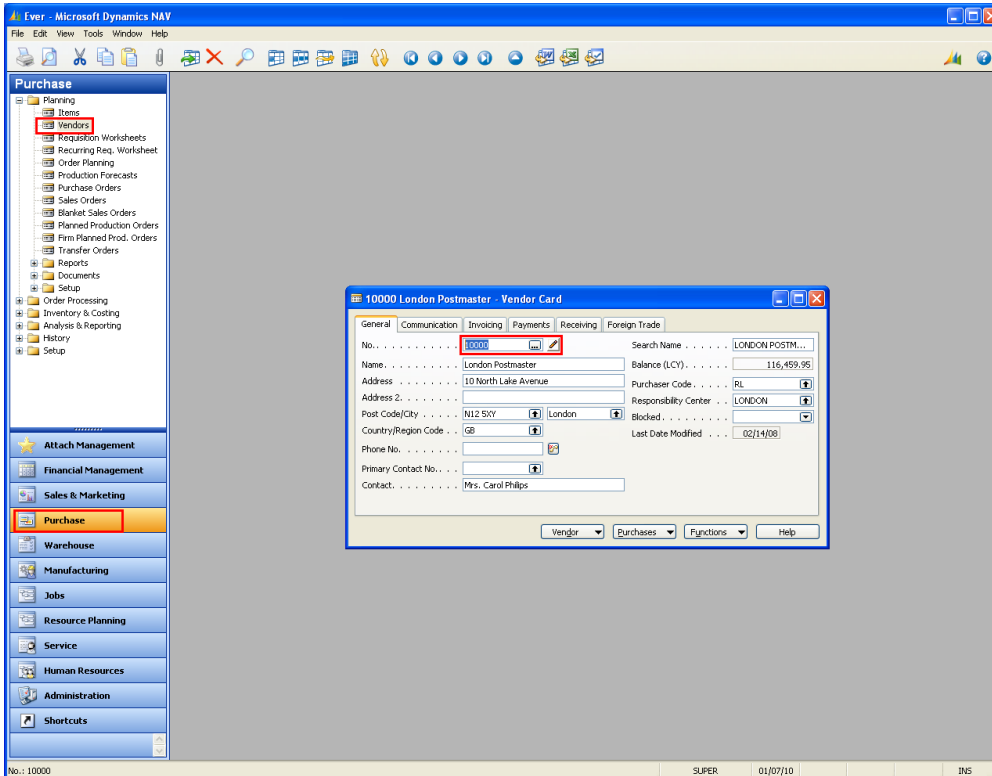


ES-DES adds a new Folder using the user selected text



### 3.3 DMS INTEGRATION FORM (SINGLE ENTITY)

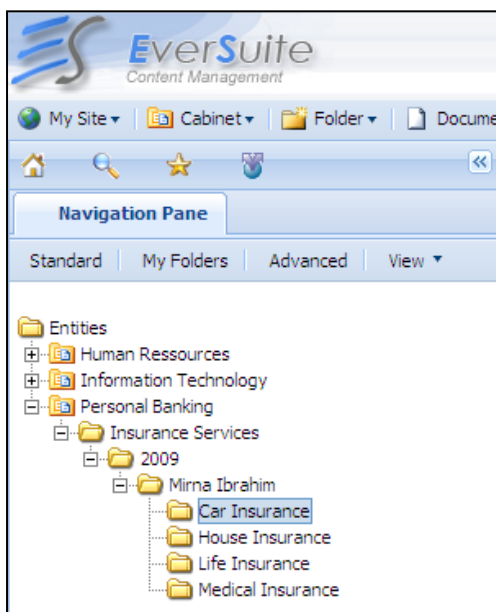
The user selects a text from an application (NAV for example) and press the combinations already defined in Hot Keys, the system will redirect him to DMS integration form.



Whenever the user selects the data entity desired, the system will redirect him to the DMS integration interface shown in the figure below.

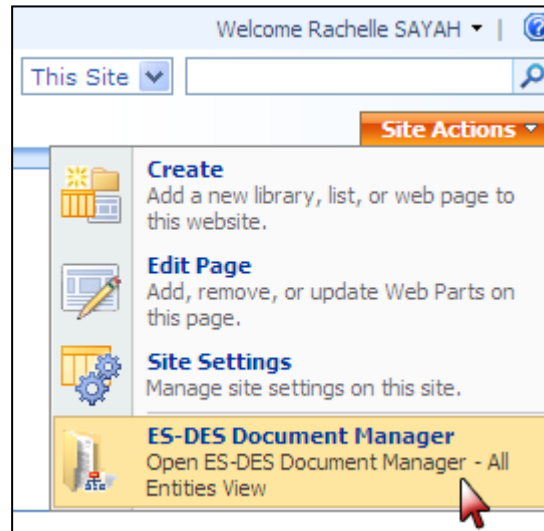
The system will check if a folder already exists for the selected value. If yes, the system will display the folder and subfolders.

If the folder is not available, then the system will create it and check if a pattern is assigned to the integration entity. If yes, it will create the pattern under the created folder.

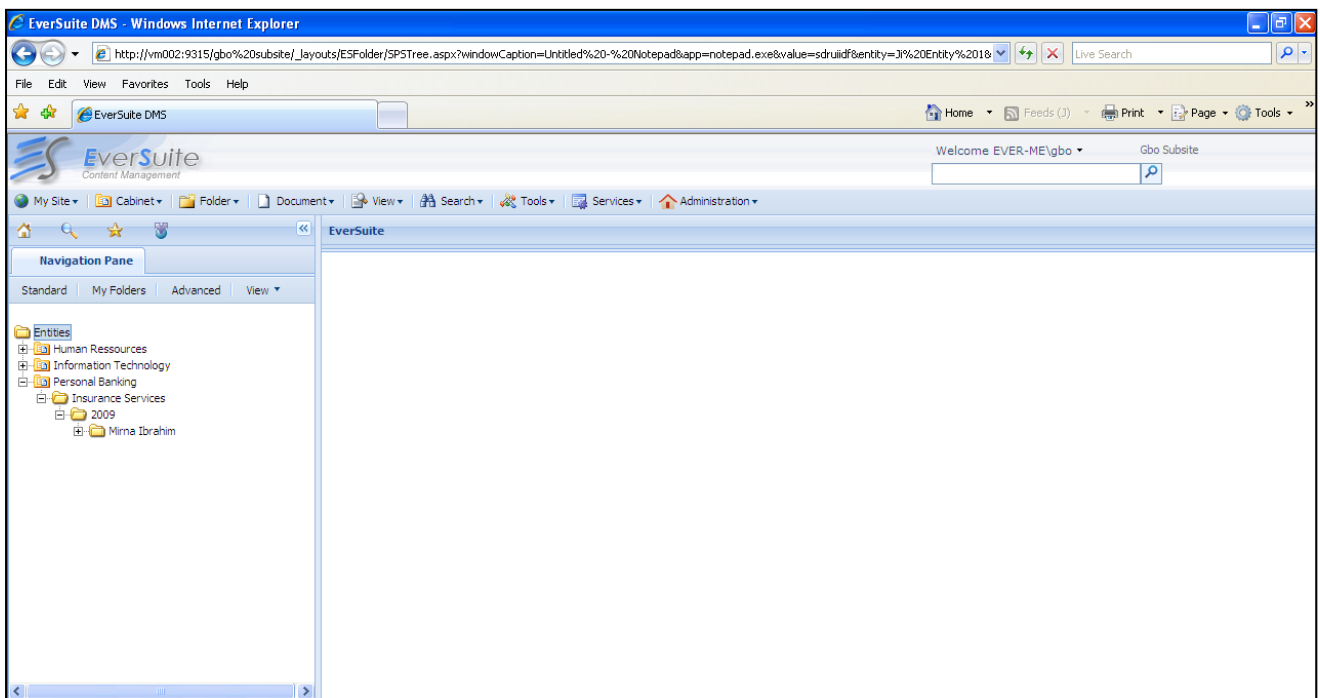


## 3.4 ES-DES DOCUMENT MANAGER

To access ES-DES Document Manager, go to the SharePoint website, Site Settings and hit ES-DES Viewer



ES-DES Document Manager enables the user to access, modify and upload documents to the system via ES-DES.



### 3.4.1 MAPPING

In case of content type mapping, and when adding file, adding multiple, scanning and adding new, the content type properties will be automatically filled depending on the value of the primary key in the entity. Mapped columns will appear in read only, since these values are retrieved from the database, as shown in the figure below

File Drag a column header here to group by that column.

Submit Cancel Reset

The document was uploaded successfully. Use this form to update the properties of the document.

Content Type	Ji Content Type
Name *	ALEX - CONTRACT OF EMPLOYMENT .docx
Title	
Single line 1	ever-me\jto
Multiple Line 1	37, Rue El Wahda
Choice 1	Enter Choice #1
Number 1	0
Currency 1	
Date Only 1	31/12/2008

## 3.5 IMPORT SERVICE

The ES-DES Import Service requires the user to paste files into a shared directory on the SharePoint Server.

The file must follow a specific naming structure:

**Entity\_PrimaryKey\_ContentType\_FileName**

**Entity:** Entity Name from ES-DES settings

**Primary Key:** Primary key from Navision

**Content Type Name:** Content Type of the document

**File Name:** Filename to be used in SharePoint.

Once pasted, the ES-DES Import Service automatically uploads the file into ES-DES

If the Filing Plan is not created, ES-DES Import Service creates the filing plan as per the Entity and the provided primary key.

The file is uploaded to the Filing Plan and file properties are automatically mapped with their target data.