

iPortalDoc
Document Management System

iPortalMais, Soluções de Engenharia para Internet e Redes

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Chapter 1

iPortalDoc

The present manual is directed to all users who have to work daily with iPortalDoc. You don't have to be an expert in computers to work with iPortalDoc, for iPortalDoc, due to the nature of its functionalities, is designed to be inserted in any type of institution, as well as to be intuitively used and easily learned. However, and besides its easy working, the user should have a short training directed to iPortalDoc functionalities.

For that reason, this manual has been structured and conceived for the final iPortalDoc user, and it is a simple guide which shall guide the user along the functionalities of the menus, as well as the creation of the processes.

1.1 What is iPortalDoc?

iPortalDoc is a Workflow and Document Management System for companies and institutions, that allows its users to manage the flow of documents, as well as, simply, to proceed to their archival for posterior management. For its good working, it's vital that it is well organised. This Document Management System faces digital information as a replacement for paper and not as an adjacent technology. iPortalDoc does not work alone, that is, iPortalDoc works in collaboration with another system, the IPBrick system. iPortalDoc activity starts in IPBrick, for it's here that the insertion and management of iPortalDoc users is made, as well as of the groups to which they belong. It's also there that the registers of Entities are created, and the respective contacts with whom the institutions interact, and which are also necessary during the activity in iPortalDoc.

1.1.1 Users Management

The only profile capable of performing this task is the system administrator. For that, the administrator has to accede to <https://ipbrick>, where his validation shall be asked.

The image shows a login validation window for IP Brick. At the top, there is a grey header bar with the text "IP BRICK®" in white. Below this, the window has a light grey background. It contains two input fields: "Name:" with the text "admin" entered, and "Password:" with "*****" entered. Below these fields is a small button labeled "OK".

Figure 1.1: Validation in IPBrick

After validation, a screen appears which shows IPBrick definitions by default. The administrator shall have to accede to *IPBrick.I* division on the left side of the screen and accede to the *Users Management* function. If there are already users in IPBrick, a list with the users' names shall be presented as in Figure 1.2, if there are no users in the system, nothing will appear.

On the right side of that same screen appears the option *Insert*, on which the administrator shall have to click to insert the users. There, a form shall appear, as the one in Figure 1.3, to insert the users' data. This operation may be repeated as many times as necessary.

However, it's important not to forget that at the end it's necessary to make *Apply Configurations*, so that the users may be definitely admitted as system users, as in Figure 1.4.

Next, there is a similar process for the creation and management of groups. For that end, we accede to the menu *User Groups* in *IPBrick.I* division. If there are groups, these are presented on the central part of the screen, and the insertion of more groups is possible by clicking the button *Insert*.

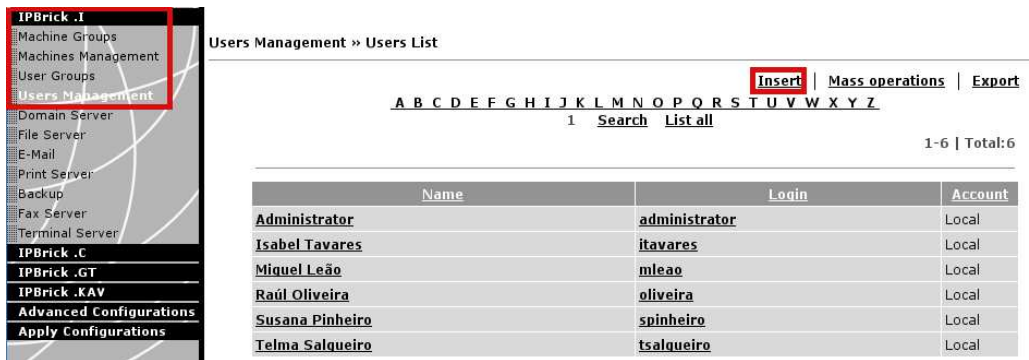


Figure 1.2: Insert users in IPBrick

However, the users which have just been inserted in IPBrick, shall not immediately appear in iPortalDoc, and they cannot accede it. The admission of new users in iPortalDoc is an operation that shall have to be done in the iPortalDoc itself. This functionality shall be presented ahead in **Chapter 2**. As for the removal of users, it shall also be made in iPortalDoc.

1.2 iPortalDoc's Features

A good implementation of iPortalDoc means to have a series of benefits for the activity of organisation. Among them we can detach:

- **use facility, reduced training:** as it was already mentioned, iPortalDoc does not need substantial computer knowledge, a little orientation and practice are enough for a good use of iPortalDoc;
- **integrated in the users' working environment:** this system allows the integration of any type of document in any format;

Users Management » Insert

Back

User definitions	
Name:	<input type="text"/>
Login:	<input type="text"/>
Server:	Local ▾
Work Areas:	Work Area 1 ▾
Password:	<input type="password"/>
Retype Password:	<input type="password"/>
Quota:	<input type="text"/> MB
Biometric Validation:	No ▾

Figure 1.3: Users Form

- **safety in the access and actions about documents:** iPortalDoc is a system that gives safety guarantees, through the attribution of several profiles and respective permissions;
- **reduction of the information on paper and control of processes through the use of workflow:** this system allows a drastic reduction of paper documents, through the digitalisation of documents;
- **communication easiness:** this system allows the exchange of information between people and / or the interested departments through a digital via in a quick and safe process, avoiding a communication system external to iPortalDoc (ex: telephone, oral communication, etc.).

After analysing the general characteristics of iPortalDoc, we shall explore the three main interaction interfaces that this system's architecture provides.



Figure 1.4: Validate Users

1.3 iPortalDoc interfaces

All access interfaces are based in communication interfaces supported in standard protocols (HTTP, SMB, and SMTP). iPortalDoc presents three access interfaces which allow the *user-system* interaction:

- WEB access through a web browser;
- SMB access (network partitions) through a file manager;
- Electronic mail access through a mail reader.

So, as iPortalDoc is supported by Internet protocols, this may be acceded from any type of workstations: Windows, Mackintosh, UNIX, Palms, etc.

In short, the user may accede to/visualize his documents through:

- a web browser (ex: Internet Explorer)
- a file manager (ex: Windows Explorer)

This type of approach for the conception of iPortalDoc allows the users the visualization of documents not only in the interior of the company (Intranet) but also from the exterior (Internet).

1.3.1 Web Access Interface

This is the most powerful interface, as it allows all types of operations on documents, workflow management, insertion of templates, etc. The graphic WEB access interface is divided into four types of areas which enable the interaction with the documents, as in Figure 1.5:

1. Navigation area in document hierarchy (left side area);
2. Visualization area of the documents from a certain section of the document management hierarchy (in the middle);
3. Search engine (superior right area);
4. Toolbar (above the documents visualization area).

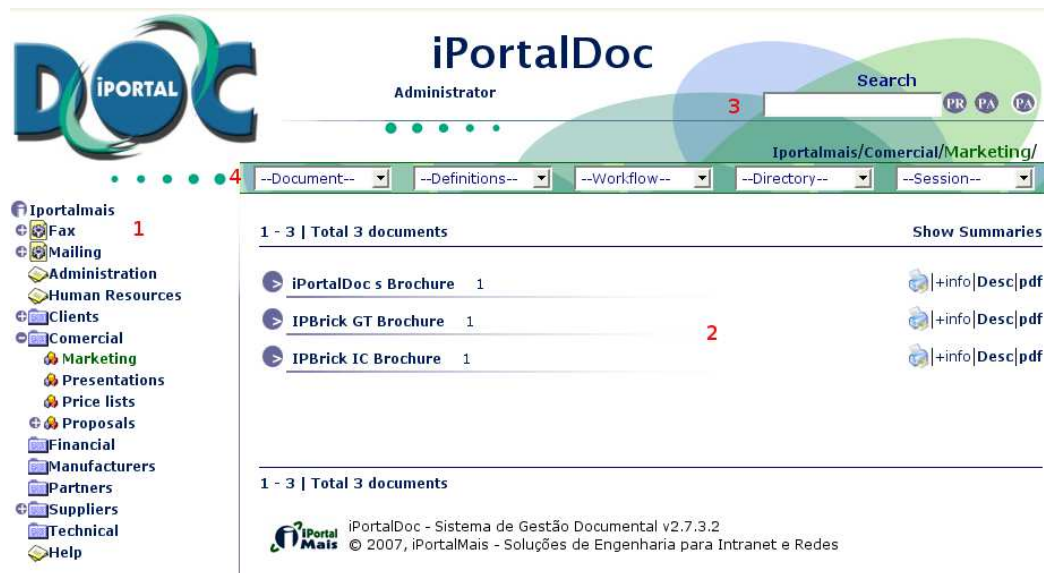


Figure 1.5: iPortalDoc navigation areas

Navigation area in document hierarchy

The navigation area in document hierarchy is on the left side of the WEB browser and allows the user to select the system's document management part (Figure 1.6) where he wants to execute queries or alterations, that is, select a section to interact with. This area also allows the user to see the sections and respective documents simultaneously, if his profile allows it.



Figure 1.6: Hierarchy of documents

Documents visualization area

The central WEB browser area, on the right side of document hierarchy, is the documents visualization area of iPortalDoc. In this area, Figure 1.7, the user sees a list of the documents which are in the section that he has selected in document hierarchy. In these lists the user accedes to or hides the summaries and descriptions of documents, selects and reads documents, and can also accede to other type of information.

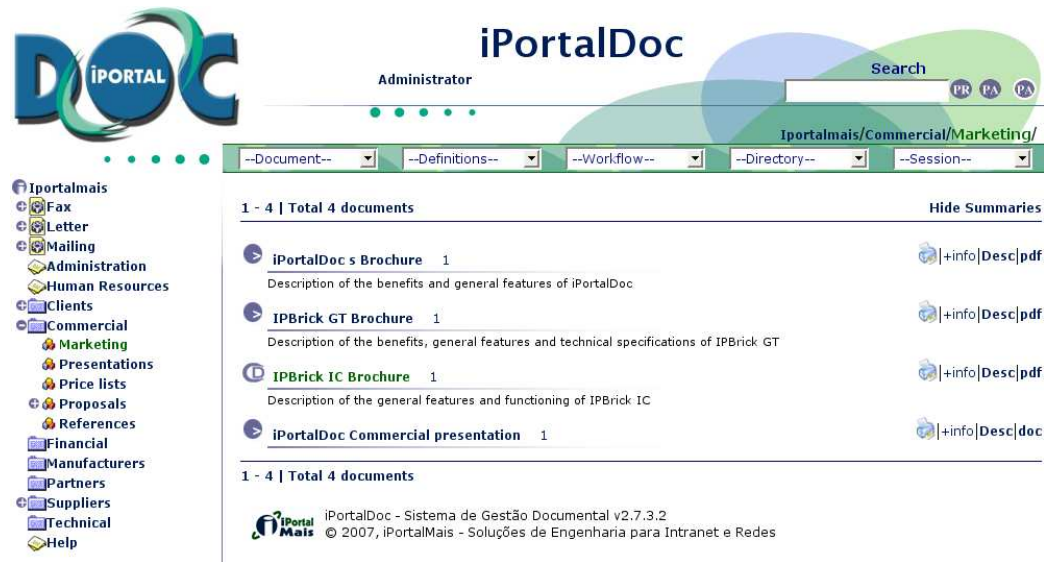


Figure 1.7: Visualization of documents titles and respective summaries

The user can also interact with the system in this area. That is, according to the menus and respective options, one can enter and manipulate the objects of the system, for example:

- manipulation of documents;
- creation of workflow (document flows);
- manipulation of sections;
- users and profiles management;
- etc.

Besides this main browser window, where the major part of the interaction with the system occurs, when it's necessary to see information

simultaneously, additional navigation windows are launched to, for instance, query information about the document selected (associated document flows, etc.), see the actions to execute, etc.

Toolbar

In the WEB browser, above the central documents visualization area, is the toolbar, as you can see in figure 1.8.

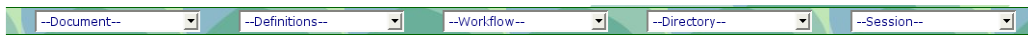


Figure 1.8: Menus for manipulation and configuration of: documents, workflow, etc.

The toolbar has got five essential “Menus”.

Note: However, you have to take into account the users’ profile, that is, the number and type of menus, as well as the respective menus options; they may vary according to the user and respective profile. Permissions and profiles shall be further explained. So, you can accede to a series of functionalities from each menu:

- **Menu Document** - manipulate objects the document type and accede to associated information: document attributes, associated documents, revisions, document flow, actions to execute on documents, etc;
- **Menu Definitions** - accede to the definitions of the system regarding profiles, users, groups, types of entities, entities and contacts; creation of new types of documents and templates;
- **Menu Workflow** - manipulate document flows, instantiating the available factory flows and configuring them for a further use;
- **Menu Directory** - manipulate objects the section type (or directory) that compose the document hierarchy. Here you can associate users to these sections with certain use profiles and this way associate document flows to users in the appropriate sections

- **Menu Session** - accede to and configure the information of the session in progress, to see the user's information in the system, see the pendent actions and accede to personal agenda.

Search

The iPortalDoc search engine allows an easy and fast search of the documents without the need to explore all sections and documents.



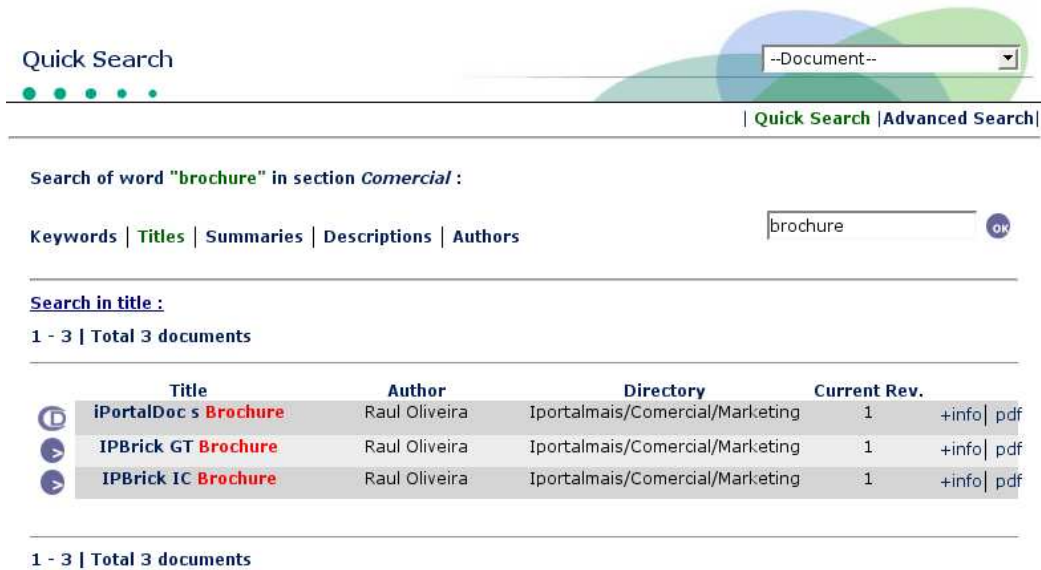
Figure 1.9: Documents Search in the web interface

In a first stage, the user may select the section where he intends to execute the search, **or simply let the search engine explore all sections when activating the main section.** While doing the search, the search engine explores not only the section, but also the subsections and files from each one of them. After search, when the list of results is being executed, you should have to take into account the users' permissions, for the list shall only contain the documents to which the users have permissions. The second phase shall be the execution of the search, which can be made in two ways:

- Quick search (QS);
- Advanced search (AS).

In quick search you shall submit the word which best characterizes the document. In other words, the word that best characterizes the documents is placed in the search box. In the search result appears a list of the documents which have been classified with the submitted word. By default, the submitted keywords are searched in the keywords of the documents. There, a bar appears above the list of results, where you can see the documents where the word occurs in titles, summaries, descriptions and authors (Figure 1.10).

The advanced search is more complex, because you can do a bigger filtration of the search by crossing information and avoiding undesired information, for example: search the documents of the iPortalMais supplier introduced in iPortalDoc in January 2002 by the user Francisco. According to this option, the user can accede to a form (Figure 1.11) where he can



Quick Search

--Document--

| Quick Search | Advanced Search |




Search of word "brochure" in section Comercial :

Keywords | Titles | Summaries | Descriptions | Authors

brochure OK

Search in title :

1 - 3 | Total 3 documents

	Title	Author	Directory	Current Rev.	
	iPortalDoc s Brochure	Raul Oliveira	Iportalmals/Comercial/Marketing	1	+info pdf
	IPBrick GT Brochure	Raul Oliveira	Iportalmals/Comercial/Marketing	1	+info pdf
	IPBrick IC Brochure	Raul Oliveira	Iportalmals/Comercial/Marketing	1	+info pdf

1 - 3 | Total 3 documents

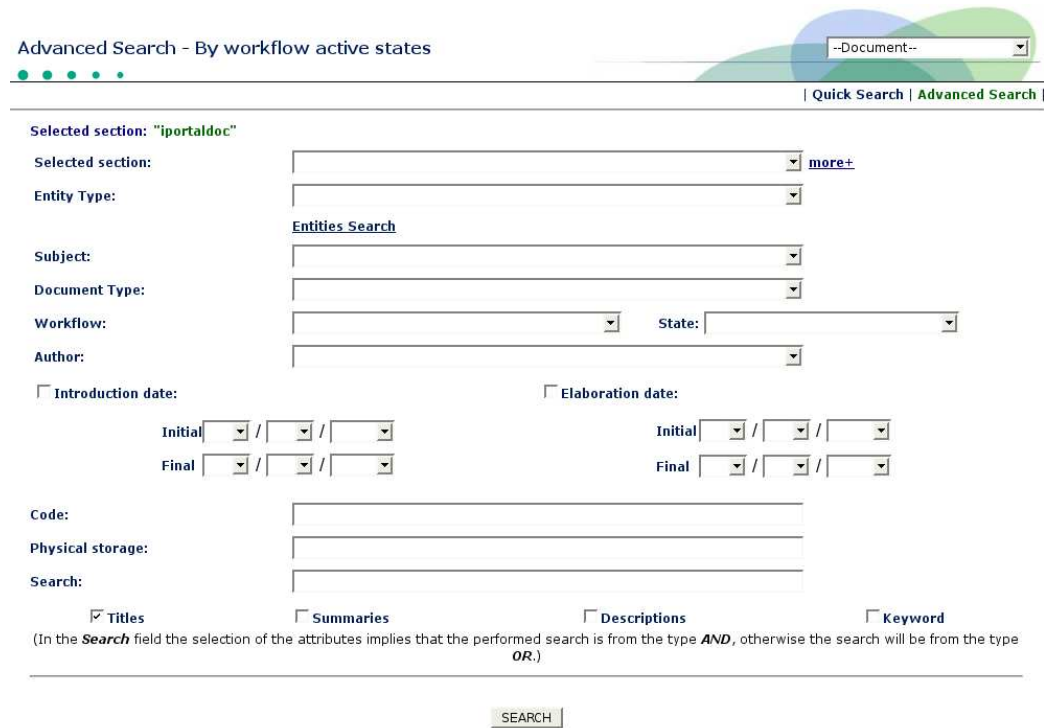
Figure 1.10: Search results of a document.

search by: entity (supplier, client, etc), type of document, workflow, document introduction date in iPortalDoc, etc.

1.3.2 File system interface

Besides the WEB interface, there is a SMB interface (access to partitions) created to offer a quick access to the documents, for the access to the documents through network file systems is faster than WEB accesses. This file management is made in the Intranet. Visual aspect of this access is familiar to the majority of users, as you can see in Figure 1.12.

The Document Management System creates a network partition with the documents that the user may accede in iPortalDoc, according to the permissions of the WEB interface. In this interface, on the left side of the screen, you can accede to the document hierarchy such as the WEB interface



Advanced Search - By workflow active states

--Document--

| Quick Search | Advanced Search |

Selected section: "iportaldoc"

Selected section: [more+](#)

Entity Type:

[Entities Search](#)

Subject:

Document Type:

Workflow: State:

Author:

☐ Introduction date: / / ☐ Elaboration date: / /

Initial / / Final / /

Code:

Physical storage:

Search:

☒ Titles ☐ Summaries ☐ Descriptions ☐ Keyword

(In the **Search** field the selection of the attributes implies that the performed search is from the type **AND**, otherwise the search will be from the type **OR**.)

Figure 1.11: Advanced search form

hierarchy. This interface facilitates the copy of large quantities of documents and enables a friendly visualization to the users familiarised with this type of environment.

The system creates automatically two single folders (network partitions). These folders have two types and have different functions:

- **Insertion** - it's the folder where we put the documents coming from outside the system, for example, via digitalisation, associating them to the respective workflows (Figure 1.13);
- **Access** - in this folder it's represented the document hierarchy of iPortalDoc to which the user may accede to through his permissions (Figure 1.13).

To accede to these folders, the following steps are necessary:

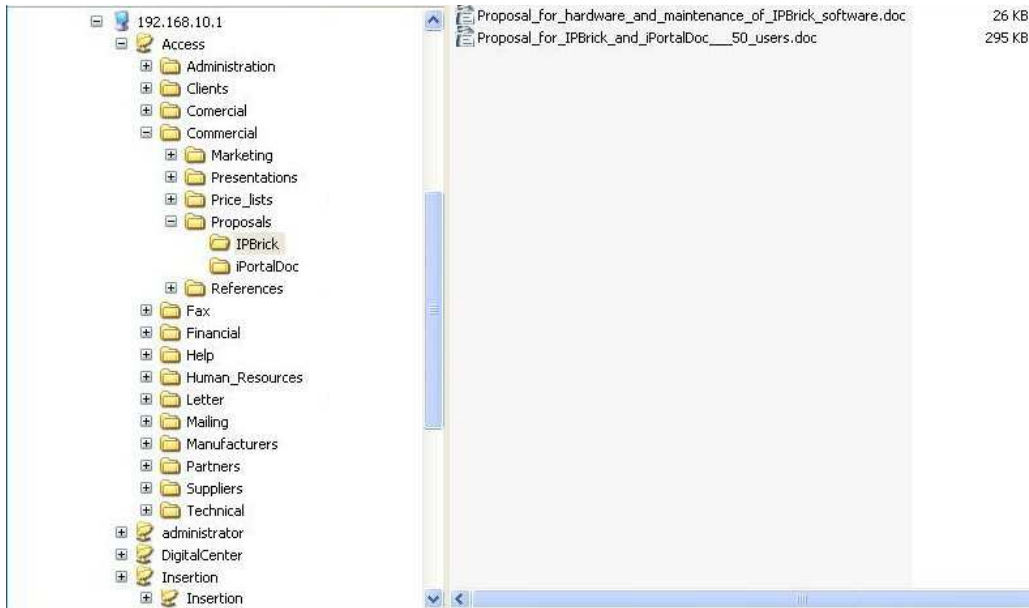


Figure 1.12: Visualization of the user's partition in the document management system

- in the Windows operating system, accede to the *Windows Explorer* (My computer);
- Menu *Tools*, option *map network drive*;
- There appears a dialog box where you put the unit to which you want to accede to: *unit Z*, and the folder which you want to accede to: *Insertion folder* or *Access folder*. You shall put the folder domain followed by / and the folder name (Access or Insertion) where the system asks the folder which you want to accede to.

Has it has already been mentioned, the *Insertion* folder allows the introduction of documents in iPortalDoc and consequently it places them in the respective document management flow (Figure 1.14). The workflow folders are automatically created from the moment the workflows are activated.



Figure 1.13: Folders: Access and Insertion

However, the documents inserted there do not permanently stay in these folders, for the system searches these folders “looking for” new documents, and when it finds them, it “passes” them into the access folder and thus to the hierarchy of iPortalDoc.

When the document is introduced this way, it’s convenient that the first action is To Classify, because when the document arrives to iPortalDoc, as it has already been associated to the respective workflow, it is immediately directed to the person responsible for the first action. A document inserted this way shall have a different aspect from the remaining folders when it appears in document hierarchy, and the icon itself is different.

In this situation, in document hierarchy, both in the WEB interface and the File Manager interface, the document appears in a directory which corresponds to its workflow (Figure 1.15), and that directory is composed by sub-folders which correspond to the year, month and day of introduction of



Figure 1.14: Insertion folder with the iPortalDoc workflow folders

the document in the system. The document shall be found in the sub-folder corresponding to the day of introduction

1.3.3 Electronic mail interface

The user can also communicate with the document management system through the electronic mail service. Whenever the user has an action to execute in document manager, when the workflow is activated, it will send an e-mail (see figure 1.16) to the owner of the action with a link which will allow him to accede the action he has to execute. Afterwards, if the action has not yet been executed, the system shall send another e-mail to warn the owner of the action that he has an action to execute and that it should have already been executed. On the day the term of the action ends, the system shall send again a notice to the owner of the action. If the term of



Figure 1.15: Document hierarchy at the moment of introducing the documents via *Insertion* folder

the action expires, and the action has not been executed, the system shall send an e-mail to the Co-ordinator of the section and to the Administrator the following day. It should be taken into account that the frequency of the actions depends on the term established to execute each action.

Besides this actions execution notification, the electronic mail interface, along with the WEB interface, allows the user to associate documents to e-mails. This functionality is useful to the user in order to have always a quick and organised access to the documents, the e-mails and workflow associated to them, as in figure 1.18.

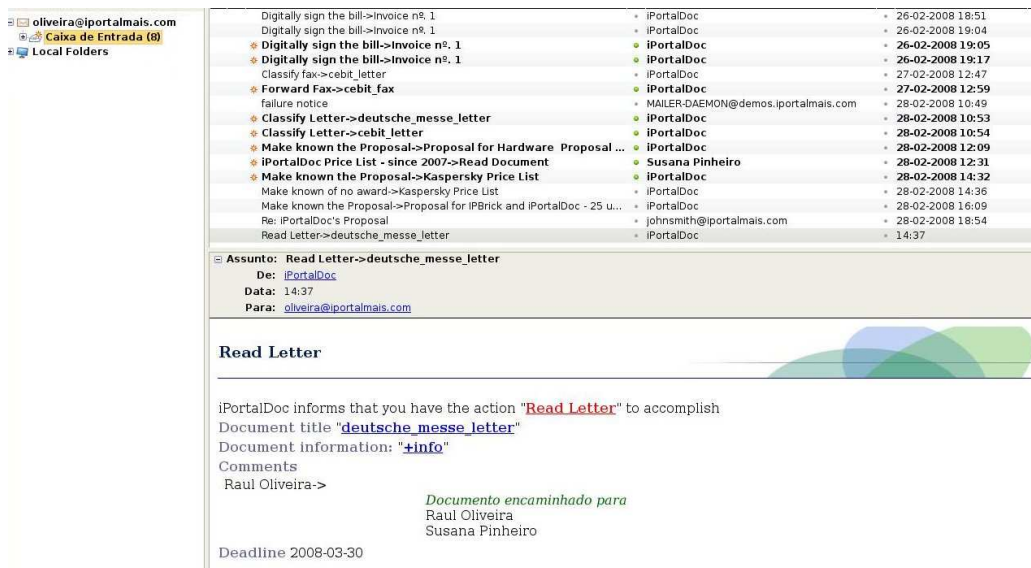


Figure 1.16: Visualization of an iPortalDoc e-mail directed to a user

Through the WEB interface, as long as using iPortalDoc mail server, when selecting a document and acceding to the *info* option, you can accede to e-mails associated to the document selected, as in Figure 1.17.

To accede to the Electronic Mail interface it's necessary that each user possesses two e-mail accounts:

- **The normal user account** - this account is automatically created by IPBrick, when the users are inserted. This account is the type: **username_user@domain.com**. With this account the user is notified about the actions he has to execute in iPortalDoc.
- **The special iPortalDoc account** - this account is automatically created when the user first accedes to iPortalDoc, that is why the first entry is longer, and it's the type: **Dbdocusername@domain*.com**.

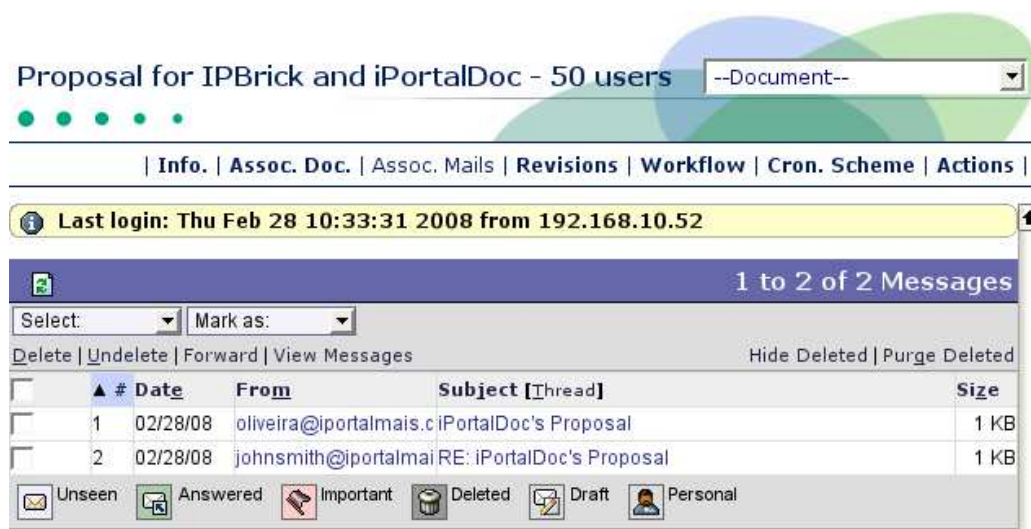


Figure 1.17: Visualization of e-mails associated to a document.

With this account the user accedes to the *Access* folder where he can see the hierarchy such as the WEB interface and respective documents.

*This *domain* is the company's domain. Consequently, the domain varies according to the company. In the case of iPortalMais it would be, for example: user@portalmais.pt.



Figure 1.18: Visualisation of e-mails associated to documents in the Access folder

Chapter 2

iPortalDoc Functionalities

The toolbar is divided into five distinct menus, as you can see in figure 2.1. Each menu option regards iPortalDoc functionality.

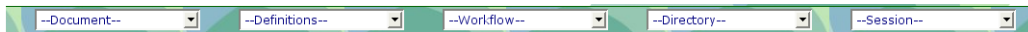


Figure 2.1: Toolbar

2.1 Menu Document

If you accede to the menu without selecting a document, you shall only find available the functionalities **Insert**, **Remove** (with or without search), **Link docs** and **Move Docs**. In order that all options (represented in figure 2.2) can be available in this menu, it is necessary that a previous selection of the document is made. To select a certain document, it is necessary to click the image presented in the central frame, which is on the left side of the title. Whenever a document is selected, the colour of the title is presented differently from the remaining documents. The **menu Document** is divided into two distinct parts, one related to the actions which can be executed on the document, and the other, related to the information and record of the document in question.

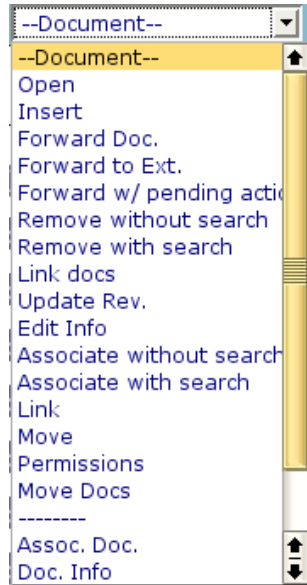


Figure 2.2: Menu Document

2.1.1 Open

When acceding to this option, the user visualizes the last revision of the document. Depending on the extension of the inserted file, it shall be open with the corresponding application, in other words, if the file has the extension .xls, it shall be presented to the user through the Excel application, in case the user is working in a station with the operating system Windows.

2.1.2 Introduce

Whenever the user intends to insert a new document in iPortalDoc, he shall have to accede to this option of the menu. A form like the one in figure 2.3 shall appear in the central frame, where the following fields are required:

- **Doc. Type**, when a type of document is attributed, a code is automatically generated for the document in question. By default, the “Non-defined” type is selected. To create a new type of document, the user should select the functionality **Doc. Types** in the **Menu Definitions**;

Insert document [Docs.](#) ↑

(in Directory: [Iportalmais/Help/](#))


Entity Type:	<input type="text"/>
Entity:	<input type="text"/>
Assunto:	<input type="text"/>
Doc. Type:	<input type="text"/>
Workflow:	<input type="text"/>
Title:	<input type="text"/>
Order:	<input type="text" value="100"/>
Revision:	<input type="text" value="1"/>
Code:	<input type="text"/>
Value:	<input type="text"/>
Author:	<input type="text" value="Administrator"/>
Created on:	<input type="text" value="27"/> / <input type="text" value="2"/> / <input type="text" value="2008"/> (day/month/year) 
Summary:	<input type="text"/>
	<input checked="" type="checkbox"/> Show summary when listing document
Description:	<input type="text"/>

Figure 2.3: Menu Document

- **Workflow**, in this pop list the user shall have to choose the workflow that the document to insert shall follow. The user shall always have to have a workflow associated to the section, and for that he shall have to accede to **menu Workflow** and instantiate the workflow, then select the option **configure** and, finally, open the option **User.Work.Assoc.** from the **menu Directory**. The instantiation and configuration of the workflow can only be executed by a user with the profile Super User;
- **Title**, it corresponds to the title with which the document shall be listed in the central frame;
- **File** is the field where the user loads the document into the system. This field has to be filled for the majority of workflows. However, some types of workflows do not demand it.

Besides the required fields, other fields help to complement a document description:

- **Entity Type**, where the user selects the activity branch to which the document is associated. After choosing the type of entity, the field **Entity** shall appear where the entity is specified inside the type previously selected. It's important to say that the entities are inserted in IPBrick; in iPortalDoc only the entities previously set in the system are selected.
- **Subject**. In this option it's possible to insert the subject mentioned by the document to be introduced. To insert a new subject in the subjects list, go to the menu **Definitions** and select the field **Subjects**.
- **Order**. Through this functionality, the user may specify the order by which the document shall appear inside the section it shall be introduced in. A low number (1, for example) shall place the document on the top of the list of documents presented in this section. The documents assortment method may be configured through the functionality **Order Docs**, in **menu Definitions**.
- **Revision**. In this field, the user may define the document edition number. The default number is 1.
- **Value**. Through this option, the user may define a value for the document introduced, as for example, the monetary value of a proposal.

- **Created on:** it's the space where you can place the date when the document was created.
- **Summary** and **Description** are fields where the user may expose the content of the document, and, as a rule, the summary is shorter than description. Both fields may or may not appear when the document is listed, depending on the preference of the user who introduces the document.
- **Physical storage** is the text box where the user should refer the location where the *material* format of the document is (for example, the location in the archive of a paper document).
- **Keywords** is the field destined to the words that better describe the document and that may be useful to find the document in searches by keywords.

2.1.3 Forward

Whenever a user has permissions about a certain document, he may direct it to another entity. For that, all he has to do is to select the document and, next, one of the three functionalities **Forward**, depending on the destiny to where he intends to send the document. In any of the options the user may insert a message and a *post-it*, and the message shall be registered in the document Workflow, and the *post-it* shall not. Besides that, he may define which users shall accede to the document. As it was already mentioned, the different forward options contain specific properties according to the purpose of the document. Next, each option shall be explained:

Forward Doc.

When choosing this option, the user selects the user(s) to whom he intends to forward the document (figure 2.4). The selected users shall be notified through an e-mail with a *link* to the document.

Forward to Ext.

The user may forward the document to the exterior, he shall only have to select option **Forward to Ext.** and put the email(s) from the selected entity in the box *Forward to* (figure 2.5).

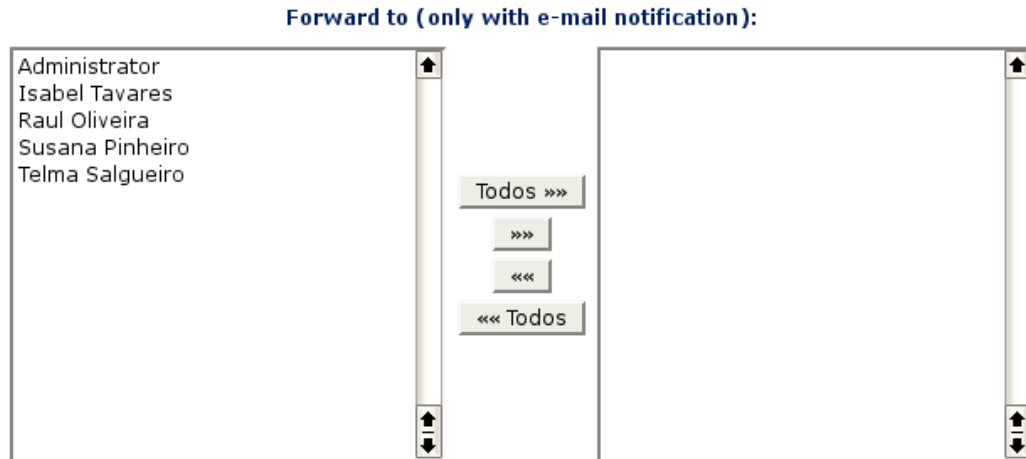


Figure 2.4: Forward a Document



Figure 2.5: Forward to the Exterior

Forward w/ pending action

Through this option, besides the email that the user may receive due to the forward of the document (sending the email is optional and defined at the time of forward), an action is also added to the list of his pending actions. However, this action does not influence the document workflow. The time available to execute this action may be determined through the functionality *Action Time Limit*, represented in the following figure:

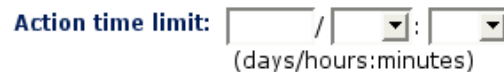


Figure 2.6: Definition of the action time limit

2.1.4 Stamp

When acceding to this option, the user should have previously selected the section where he intends to insert the stamped document. iPortalDoc creates a sequential stamp which shall be copied to each file introduced in the system. Afterwards, an action to digitise the document shall be launched, and then it's associated to the respective type of document and workflow so that it can be introduced.

2.1.5 Remove

Whenever you want to eliminate documents from the system, you should use the **Remove** functionality. For a document to be erased from iPortalDoc, it should forcibly happen at the *Final State* of its Workflow, and the user shall have to have permissions which allow him to execute this operation. This functionality is divided into two options:

Remove without search

Through this option you can remove all documents in the section where the user is and consequent subsections. The documents shall appear disposed by hierarchy, and the user shall only have to select the documents to eliminate or choose to remove all documents from that section through the upper right corner option *Select all*.

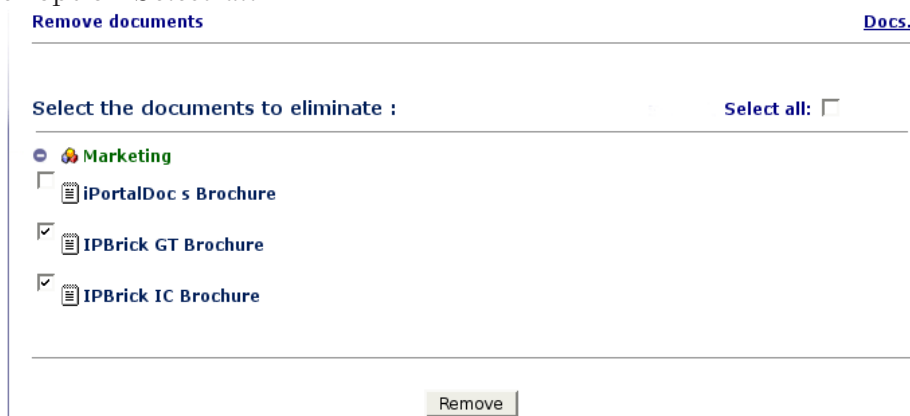


Figure 2.7: Remove without search

Remove with search

When selecting this option, the user is able to search the document he intends to remove, and it's possible to specify the directory where the document is, as well as the type of document, the workflow or the author of the information (see figure 2.8). Next, a table similar to the one in figure 2.7 shall appear and there the documents corresponding to the specificities the user determined in search can be removed.

2.1.6 Link Docs

This option allows the creation of a copy of the document to add in other sections. When selecting this functionality, the user shall have to choose first the document(s) he wants to connect and, next, mark the section or sections where he wants to copy the documents to.

2.1.7 Digitalise

This operation is integrated with the file management interface, in so far as the introduction of documents (such as faxes and letters) with the functionality **Digitalise** is made through the insertion folder which associates the documents to the respective workflows. The scanner is programmed to digitalise and send images to the *Digital Center* (share folder). Whenever a user intends to introduce a document in the system through digitalisation, he shall have to accede to the option **Digitalise** in the **Menu Document** and select the Workflow to which he intends the *Digital Center* folder to point to.

2.1.8 Update Rev.

When selecting this option, the user may update the file associated to the document, attaching a new one. To enhance that, when a new file associated to the document is presented, the file previously presented does not disappear, it stays associated to the history of the document and it can be seen when acceding to **Revisions**, in the **menu Document**. Besides, in the document it's also possible to change its code (if that is allowed), its value, its elaboration date, its description and physical location. When a update of

Remove documents

Docs.

Selected section: "Help"

Selected section:

more+

Entity Type:

Entity:

Assunto:

Document Type:

Workflow:State:

Author:

Introduction date:

Initial / /

Final / /

Elaboration date:

Initial / /

Final / /

Code:

Physical storage:

Search:

☒ Titles

☐ Summaries

☐ Descriptions

☐ Keyword

(In the **Search** field the selection of the attributes implies that the performed search is from the type **AND**, otherwise the search will be from the type **OR**.)

SEARCH

Figure 2.8: Remove with search

the document occurs, its edition number changes, and that number can be configured by the user at the updating moment.

The document update is only possible in three situations:

- If the document is at the *Final State* of its workflow;
- If the document workflow has began but no action has been executed;
- If there is a specific action in the workflow that orders the document update.

2.1.9 Edit Info

When acceding to this functionality, the user can modify the information concerning the document, such as title, associated entity, value, summary, description, physical location and keywords. Besides that, the type of document and code may also be modified, if there are permissions concerning that matter. The only information that cannot be changed concerns the document, its edition and the associated file (to execute the edition of the document and/or insert a new file, choose option **Update Rev.**).

The alteration of document information is only possible in the same situations indicated in the functionality **Update Rev.**.

2.1.10 Associate

The user shall resort to this functionality if he intends to relate two or more documents. This association may be one-way or two-way, and the user only has to select the type of relation on the right side of the documents list (see figure 2.9). The user can only see the sections and documents to which he has the permission. There are two functionalities which allow the association of documents:

Associate without search

In the option **Associate without search** appears the section and the subsections that allow the association of documents. To associate the document previously selected, just click the checkboxes presented in this list and click the *Associate Documents* button.



Figure 2.9: Associate documents

Associate with search

The option **Associate with search** allows a previous selection, so that only the documents corresponding to the characteristics indicated by the user may appear. This type of search avoids the search of documents through the hierarchy.


2.1.11 Link

A document existing in a certain section may be connected to another section. When the user accedes to this option, a list of all sections to which the user has permission is presented in the central frame. To add the document to another section, just click the intended section checkbox (se figure 2.10). To execute this action it's important that the user has writing permission in the destiny folder. If the user intends to change the document folder, he shall select the **Move** functionality.

Link document[Docs.](#)

Selected Document: iPortalDoc s Brochure

Select the directory where you want to store the document:

☐  **iportalmais**







- ☐  **Fax**
- ☐  **Mailing**
- ☐  **Administration**
- ☐  **Human Resources**
- ☐  **Clients**
- ☐  **Comercial**
 - ☒  **Marketing**
 - ☐  **Presentations**
 - ☐  **Price lists**
 - ☐  **Proposals**
- ☐  **Financial**
- ☐  **Manufacturers**
- ☐  **Partners**
- ☐  **Suppliers**
- ☐  **Technical**
- ☐  **Help**

Figure 2.10: Link Documents to different Sections

2.1.12 Move

When acceding to this functionality the user shall previously select the document he intends to move, and present writing permissions in the destiny folder. The user may see the folders hierarchy in the central frame, and there select the directory where he wants to move the document to. If he intends to execute a copy of the document in another folder, he shall select the **Link** functionality.

2.1.13 Permissions

To accede to this option, the user needs a Co-ordinator or Super User profile in the section, as this functionality enables the alteration of the permissions attributed on the section where he is and on the selected document (see figure 2.11). It's only possible to change permissions of the users which have a profile inferior to the Co-ordinator profile and if the selected document is at its *Final State*.

Users Permissions on Documents		Docs.		
Selected document: "iPortalDoc s Brochure"				
Section: "Marketing"				
	Profile in section	Docs Permission		
Administrator (A)	Read	<input checked="" type="checkbox"/>	Write	<input checked="" type="checkbox"/>
Raul Oliveira (A)	Read	<input checked="" type="checkbox"/>	Write	<input checked="" type="checkbox"/>
Susana Pinheiro (C)	Read	<input checked="" type="checkbox"/>	Write	<input checked="" type="checkbox"/>

Figure 2.11: Users' permissions

2.1.14 Move Docs

In this functionality, a list of all documents in the section where the user is shall appear in the central frame. There, the user may select the documents he wants to move and, after clicking the *Select Sections* button, select the section to which he intends to move the document(s).

2.1.15 Cancel the Workflow

When the user selects a document which is not at its final state and accedes to the **menu Document**, this option is visible. Its purpose is to cancel the flow the document should have to go through, routing it immediately to its *Final State*. For more information about workflows, see section **2.3 - Menu Workflow** of this manual.

2.1.16 Assoc. Doc.

When acceding to this option, a window is presented, in which all documents associated to the selected document are listed. To associate documents, select one of the following functionalities: **Associate without search** or **Associate with search**.

2.1.17 Doc. Info

A list of all Meta-information concerning the selected document is presented in a window (figure 2.12).

2.1.18 Assoc. Mails

When acceding to this functionality, the user can accede to the e-mails associated to the document selected. To associate e-mails to a document, the user has to include in the title or in the body of the e-mail that he intends to send the reference concerning the document, through a code of the document itself. For example: ref<ND_586/2004>.

2.1.19 Revisions

In this functionality the user can accede to the different document revisions, including data and files concerning each one of the editions. There are two types of editions, one concerning the introduction of the Workflow and another one which belongs to the workflow. When a revision is updated during the workflow, this action does not begin a new workflow. On the other hand, if the document is at its *Final State*, a new workflow is initiated.

Proposal for IPBrick and iPortalDoc - 50 users

--Document--

| Info. | **Assoc. Doc.** | **Assoc. Mails** | **Revisions** | **Workflow** | **Cron. Scheme** | **Actions** |

Entity Type:

Entity : Dual Team

Location:

Contact:

Assunto:

Doc. Type: Proposal

Workflow: Proposals

Title: Proposal for IPBrick and iPortalDoc - 50 users

Order: 100

Revision: 3

Code: PR_2/2008

Value:

Author: Susana Pinheiro

Original Author: Susana Pinheiro

Created on: 21 Feb 2008

Inserted on: 28 Feb 2008 at 16:18:05

File: proposal_iportaldoc_template_1.doc (295 KB)

Summary: The current proposal refers to the supply of Document Management software iPortalDoc for 25 users.

Description: The new proposal is for 50 users, instead of the 25 original.

Physical storage: Room4 File1/2008

Directories: /Iportalmais/Commercial/Proposals
/Iportalmais/Commercial/Proposals/IPBrick
/Iportalmais/Commercial/Proposals/iPortalDoc

Keywords: "iportaldoc", "25users", "dual team" and "50users"

Figure 2.12: Information about a document

2.1.20 Doc. Workflow

In this option, the user can visualise which steps of the workflow the document has already gone through. Besides that, the user can also accede to the history of workflows to which a document has previously been subjected to.

2.1.21 Doc. Actions

In this option, the user can visualise the actions he needs to execute in the document selected, if there are any.

2.2 Menu Definitions

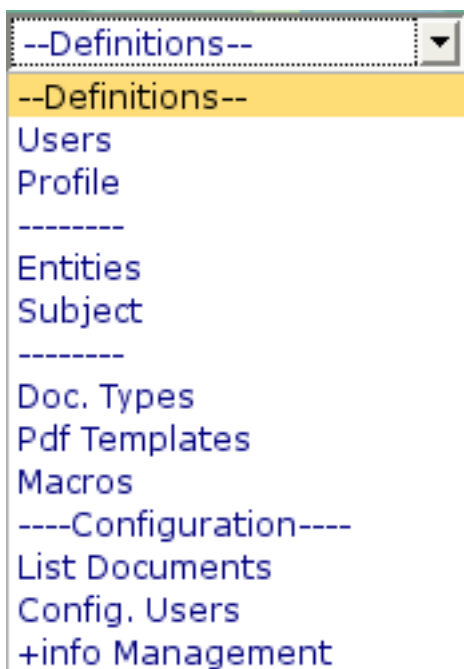


Figure 2.13: Menu Definitions

Except for the option **Entities**, to which most users may accede to, this menu can only be acceded by users with a *Super User* profile, with the

functionalities presented in figure 2.13, and which shall be described next.

2.2.1 Users

This option can only be managed by a user with a *Super User* profile. A list of the existing users is presented when acceding to this functionality. See figure 2.14. From there the user can execute two types of operations:

- **Consult the users' data** - it's only necessary to click the user in the list presented.
- **Manage the users** - Associate the users in IPBrick to iPortalDoc, so that these can interact with the system.

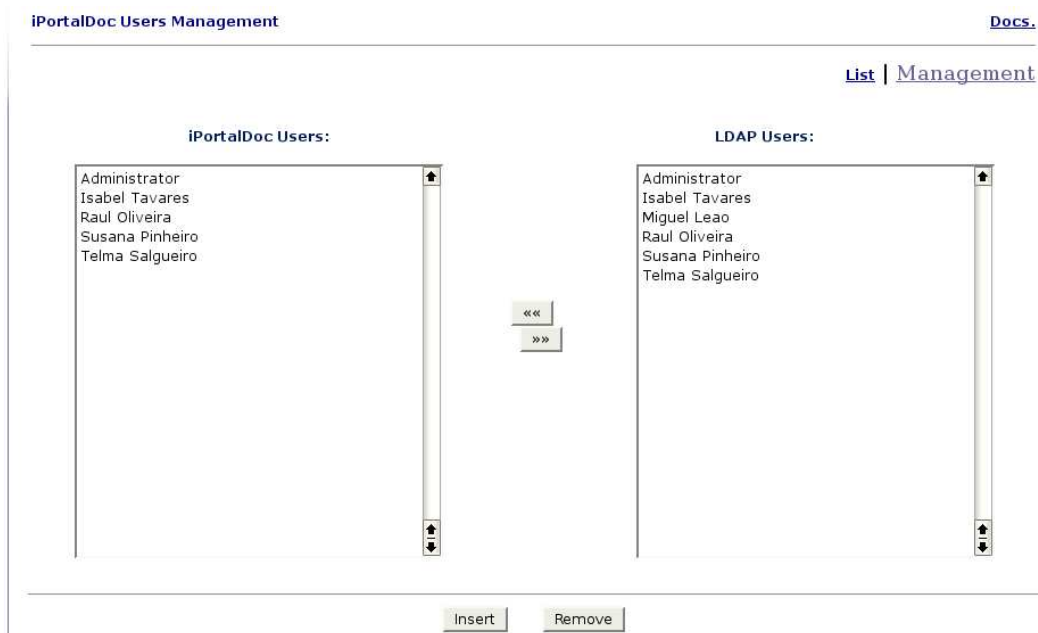


Figure 2.14: Association of users to iPortalDoc

Therefore you have to click the *Management* separator on the upper right side and, afterwards, select the users of the box *LDAP Users* into the box *iPortalDoc Users* (figure 2.14) and, finally, press the *Insert* button. To remove users, you only have to do the inverse operation.

The number of users that can be associated to iPortalDoc depends on the number of licences attributed.

2.2.2 Profile

After the user has executed the authentication in the system, several functionalities are given to him, depending on the permissions associated to the profile that he has attributed to each section. In this area the profiles can be created or modified to complement the ones that iPortalDoc brings, which are already pre-configured (figure 2.15). However, only a *Super User* has permission to do that. Some profiles and their permissions shall be next presented.

Profiles Management
[Docs.](#)

Perfil: Super User

Name: Super User

Super User ☒
Coordinator ☐
Absolute Reader ☒

Permissions:

Documents

Sections

Read ☒ Create ☒ Delete ☒

Read ☒ Create ☒ Delete ☒

Modify

Remove

Figure 2.15: Profiles

- **Super User** – a Super User is a user to which a profile is given with total permission over all functionalities of the system. The Super User can, among others, configure and change the workflows, create, remove, change groups of users; introduce, change or remove data from a user of the system; create, remove or change profiles.
- **Co-ordinator** – a user with a profile that allows him to execute all functionalities in a certain section (create, change, remove documents/sections),

is referred to as the Co-ordinator of that section. The co-ordinator can associate profiles and workflows to users, in a section co-ordinated by him. A user with that profile can visualize all documents, apart from his state in the Workflow.

- **Sub-coordinator** – a user with this profile has permission to execute all functionalities, except deleting sections. A Sub-coordinator can associate profiles and workflows, in the section he co-ordinates.
- **Absolute Reader** – a user with this profile may read all documents in the system, even if he cannot interfere. However, he cannot create, change or remove documents or sections.
- **Reader** – the user who can only read documents and sections. He can also see all information corresponding to the several documents, namely, the workflow, revisions, associated documents and possible actions that he may execute in this document.
- **Editor** – besides the permissions associated to a Reader, he can also insert documents.
- **Navigator** – can only see the sections, but cannot create nor delete. He has no action on the documents.

2.2.3 Entities

When acceding to this option of the menu, depending on the type of profile associated to the entities that the user has associated to him, it may or may not have the management option. In case he has no *Super User* profile, the user can only visualize the inserted data. In a first stage, to introduce entities it's necessary to insert types of entities. The types of entities are categories in which the user shall organize the entities related to his organization. The entities are managed in IPContacts and here are defined the profiles associated to the respective entities. Apart from the profile attributed to the user in iPortalDoc, the IPContacts interface is available for any user (figure 2.16). However, the access to these data is only allowed if the user presents a valid profile in IPContacts.



Figure 2.16: Management of Entities in IPContacts

Insert Types of Entities

To insert types of entities, select the functionality **Entities** in **menu Definitions**, and a new window appears. The available entities appear in the central frame. Afterwards, the user shall select the option *Insert* and proceed to the *Insertion of Types of Entities*. In the description, the user shall write the name to give to the Type of Entity and only after select the option insert.

Change or Remove Type of Entities

The user may always remove or change a created Type of Entity, selecting the intended Type of Entity in the option *Info*.

Insert Entities

After creating the Types of Entities, the user can introduce the entities and the contacts. To execute this operation, the user should select the functionality **Entities Management** in the **Menu Definitions** of IPBrick and continue the option *Insert*. After all intended fields are filled, the user should click the *Insert* button.

Contacts

Contacts are the people who belong to the entities related to the organization. So that the user can add a contact to an entity, he shall have to select the intended Entity. Still in the same frame, the user can select the option **Contacts** and then the option *Insert*, fulfilling the data concerning the contacts and then clicking the *Insert* button.

2.2.4 Subjects

This functionality allows the user to create, change or remove types of subjects attributed to the documents (figure 2.17). This operation may only be managed by the **Super User** or the **Co-ordinator** in each section.

Insert Subject	<u>Docs.</u>
<hr/>	
	<u>List Subject</u>
Description:	<input type="text"/>
ACRONYM:	<input type="text"/>
Comments:	<input type="text"/>
<hr/>	
<input type="button" value="Insert"/>	

Figure 2.17: Insertion of Subjects

To create a type of subject, you should add description and initials and, when desired, observations to the subject. To change or remove subjects, the user shall have to select the option *List Subjects* on the upper right side of the central frame. There the list of the existing subjects shall appear. Click the subject in question to remove or change the subject.

2.2.5 Cost Centre

This functionality (as well as the Cost Sub-centre and Network functionalities) may be activated in the **menu Session** and selecting the option **Configuration Interface**. There, click the option **Aux. Fields** and activate the desired functionality. As normal, the companies are divided into different sections, each with its specific expenses. So, the documents related to the costs of a certain area of the organization (for example, invoices) may be classified through this option. When acceding to this option, the user shall first see a list of the cost centres already added, and he can add more if he clicks the option *Insert cost centre* located on the upper right side of the screen. There, the user shall indicate a name and a code for the cost centre and, if he intends, a description.

2.2.6 Cost Sub-centre

This functionality is activated as the option **Cost Centre** (previously described). Besides, the purpose of this option is similar to the one of the option **Cost Centre**, despite allowing a more specific classification of the document, because it enables the insertion of a cost sub-centre associated to a cost centre previously introduced.

2.2.7 Network

The **Network** functionality appears as a possible document classifier, enabling the specification of the document taking into account the project to which it's associated in a company. In order to activate this option, the user should have to go to **menu Session**, and then choose the option **Configuration Interface**, and click the section **Aux. Fields**. There, the user can select this option and configure the format of the code that shall be generated.

2.2.8 Doc. Types

The type of document is an information that shall appear whenever the user introduces a document. It's an important functionality to define the Types of Documents introduced in the Document Management System. According to the functionality **Doc. Types**, the user can create, change or remove types of documents (figure 2.18).

Document Types Management
[Docs.](#)

Document Types:

Description:

Acronym:

(Acronym that will be used in the document code generation)

Code:

(Document code format)

[Codes Management](#)

Automatic template generation :

Permission - Doc. Type: ☐

(When selected, allows to modify document type and code assigned to a document)

Permission - Info: ☒

(When selected, allows to modify document information, during workflow)

Modify information: ☐

(If selected, does not allow the modification of document information)

Register Type: ☐

(If selected, does not allow document update)

Figure 2.18: Document Types Management

In the **Doc. Types** screen, the option *New Type* appears in the field *Document Types* by default. It's the option indicated in case the user wants to create a new type of document. In that situation, indicate a description, the initials, a code and a template to associate to the type of document. To enhance that, in that functionality the document type code can be shaped by the user, just by selecting the option *Codes Management*. The type of

document is an information that shall be asked whenever a document is introduced in the Document Management System.

2.2.9 PDF Templates

In this functionality the user can change, delete or create pdf format models. These templates concern the graphic aspect of the document and to generate these models it's necessary an associated document type.



Figure 2.19: PDF Templates

When acceding to this option, a list of the already created pdf templates shall appear (figure 2.19). To modify aspects of a certain template, the user should first click the desired template with the mouse. Next, he can change the template name and save the changes, clicking the *Modify Name* button, or delete the template when selecting the option *Remove*. To make alterations in a template structure, choose the option *Edit* on the upper right side of the screen.

If the user wants to create a new template, he should select the option *Template* on the upper right side, indicate the name he wants and, afterwards, proceed to its elaboration. This functionality is described in detail in the **third chapter** of this manual.

2.2.10 Macros

The creation of macros is to help the user when he wants to introduce new documents. So, instead of fulfilling a long form each time he inserts a form, he can create macros that define the type of entity, the title, the workflow and even the title of the documents (figure 2.20), and so a user shall have a shorter form to fulfil or perhaps he shall not need a form for the introduction of documents.

The screenshot shows a web interface for defining a macro. At the top left is the text 'fax »» Define macro' and at the top right is a link 'Docs.'. Below these is a horizontal line, followed by a link 'List macros' on the right. The main form consists of five dropdown menus labeled 'Entity Type:', 'Entity:', 'Assunto:', 'Doc. Type:', and 'Workflow:'. To the right of the 'Workflow:' dropdown are two links: 'Attachments' and 'Actions'. Below the dropdowns are three buttons: 'Code', 'Entity', and 'Document Type'. Under these buttons is a label 'Document Title' followed by a text input field containing the placeholder '[Document Type] to [Entity]'. At the bottom is a checkbox labeled 'Present form:' which is checked.

Figure 2.20: Definition of Macro

When selecting the option **Macros**, the user shall find a list of the existing macros. To modify the name or erase a macro, he only has to select the macro he wants and, then, click the button *Modify* (after attribution of the name) or *Remove*. If he wants to change the parameters of a macro, after selecting it he should click the option *Define macro* and proceed to modifications. To associate a user to a macro, go to menu Directory and select the functionality **Assoc.User.Macro**.

2.2.11 Order Docs

The user can ordain documents through this functionality. This order is made by section, it can be ascending or descending and follow several criteria. This functionality is available to all users despite their profile.

2.2.12 Management of +info

The option +info is visible in a list of documents of a certain section, on the right side of the document. If the user stops the mouse on that area, data concerning that document shall appear. With the functionality **management of +info** the user can configure if the informative box shall or shall not be visualised, and which parameters concerning the documents should appear (figure 2.21).

2.3 Menu Workflow

The Document Management System shall work through the Workflow, it shall conduct the documents to the people indicated where you can see the actions to execute on the document. Only the users with a *Super User* profile may accede to this menu (figure 2.22).

2.3.1 Create

iPortalDoc has got several workflow templates. However, through the creation of Workflows functionality (**Create**), the client may create new workflows or change the existing ones. With this functionality the user accedes to a list with all workflows, after clicking one of the workflows, this may execute the visualization of its diagram, selecting the link *Edit* on the upper right side of iPortalDoc central frame.

Only the Workflows, that haven't yet been instantiated, allow the execution of alterations in the diagrams. For all others with instances, the edition interface is merely informative.

To create a new workflow, after acceding to the functionality **Create** of the **menu Workflow**, the user shall have to click the link **Edit** on the upper right side of iPortalDoc central frame. In the form presented, the user shall introduce a description for the workflow and define if it allows or not the introduction of a document without executing the upload of a file (this option is not selected by default). The possibility of introducing a document in the system without attaching a file allows the use of the information generated at the moment of introduction of the document, in the file to be developed and afterwards attached to the document. An example is the introduction of a document the *Proposal* type, whose code generated (Pr.24/2004) by iPortalDoc is afterwards used in the file content to send to the client and to

2.3.

	Preview
Entity Type	<input type="checkbox"/>
Entity	<input type="checkbox"/>
Contact	<input type="checkbox"/>
Subject	<input type="checkbox"/>
Document Type	<input type="checkbox"/>
Workflow	<input type="checkbox"/>
Workflow State	<input checked="" type="checkbox"/>
Title	<input checked="" type="checkbox"/>
Order	<input type="checkbox"/>
Revision	<input type="checkbox"/>
Code	<input type="checkbox"/>
Value	<input type="checkbox"/>
Author	<input checked="" type="checkbox"/>
Original Author	<input type="checkbox"/>
Elaboration Date	<input type="checkbox"/>
Insertion Date	<input type="checkbox"/>
File	<input type="checkbox"/>
Summary	<input type="checkbox"/>
Description	<input type="checkbox"/>
Physical storage	<input type="checkbox"/>
Number of Associated Documents	<input type="checkbox"/>
Directories	<input type="checkbox"/>

53

Visible: ☒

Figure 2.21: +info Management

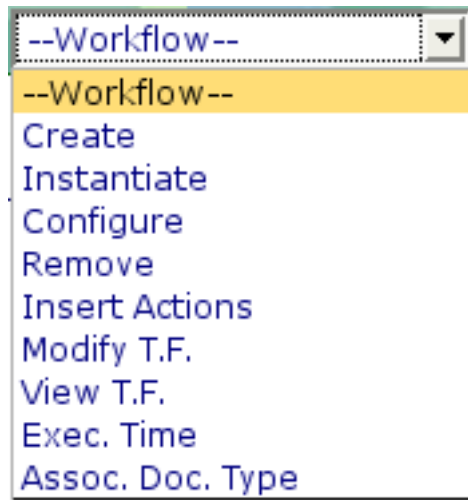


Figure 2.22: Menu Workflow

be attached to the document. This option is very useful when the user wants to introduce registers about a certain matter or when he wants to introduce documents along the workflow.

After introducing the Workflow, the access to its editions is possible through the link *Edit* presented on the upper right side of iPortalDoc central frame. The edition interface and workflow diagram are presented in a new window. In this window is a toolbar with more or less menus/options, according to the selected elements of the diagram:

- Menu States
 - **Insert:** always active;
 - **Change:** active if a state is selected;
 - **Remove:** active if a state is selected;
- Menu Actions
 - **Insert:** active if a state is selected;
 - **Change:** active if an action is selected;
 - **Remove:** active if an action is selected;

- Menu Transition F.
 - **Insert:** active if a state with action is selected;
 - **Change:** active if a transition function is selected;
 - **Remove:** active if a transition function is selected;

The following symbols have been attributed to several elements of the workflow:

- **Black ball and associated trace:** represents the introduction of the document;
- **Circle:** state;
- **Square:** action;
- **Trace:** transition function;

Due to the fact that the iPortalDoc workflows are based in state machines, before initiating the conception of a workflow the user shall have to structure it, so that the diagram shall obey the following rules:

- Transition functions always go out through the inferior part of the state and go in through the superior part;
- There cannot be two transition functions in series (one after the other) between two states;
- There cannot be more than a final state;
- An action can only have two possible results;
- Only the final state has no actions associated to it, all other states have to have actions associated to them, because the transition between states depends directly on their results.

In order that the diagram is understandable, all transition functions that execute return connections shall have to be placed on the left, and the ones that execute states advance connections shall be on the right. This way, the lines intersection risk is reduced.

Introduction of States When selecting this option from the menu States, the user can accede to the status data introduction form:

- State description;
- X coordinate and Y coordinate where the state drawn in the diagram shall be.

Introduction of actions In the window there are several fields that should be fulfilled the following way:

- Link “Define Code for Action”, shows a list of the codes available in iPortalDoc in a new window, allowing the user to select the one he thinks is the most adequate to the type of action he is creating;
- Description of the action;
- Posterior Attribution:
 - Yes, it implies that the action may be manually attributed, in other words, the person who executed the action of the previous state is the one that decides who shall execute the action, or automatically, and in this case, the system sends the action to the author of the document so that he might choose the user who shall execute the action;
 - No, when the workflow is being configured is necessary to attribute the execution of the action to a certain user.
- Results of the action:
 - Result concerning the logic True value (ex.: Approved, for an Approve action);
 - Result concerning the logic False value (ex.: Unapproved, for an Approve action);;
 - Operator by default is the operation, by logic value, which is attributed by default to the T.F. when another action of that kind is introduced in the workflows configuration area.

Introduction of Transition Functions In the present window there are several fields that should be fulfilled the following way:

- Next State, to be active whenever this Transition is executed;
- Y and X coordinates where the transition function symbol should be drawn;
- Exit from the Current State, indication necessary for the construction of the diagram;
- Exit from the Transition Function, indication necessary for the construction of the diagram;
- Result of the action which cancels the Transition Function.

The final aspect of a workflow may be more or less complex. The figure 2.23 shows the example of a valid workflow.

2.3.2 Instantiate

The Instantiation phase happens after editing the Workflow. To accede to this functionality the user should select the option **Instantiate** in **menu Workflow**. A workflow template may act as a basis for several workflows, in other words, it can be instantiated several times. Through this functionality it's possible to use the same workflow, adapting it to each Department of the company, for example a Fax type workflow may be instantiated with descriptions "Technical Department Fax" and "Commercial Department Fax", enabling the distribution of faxes to several points of the company. The workflows should be configured for the most appropriated users in each department, and the service does not need to be centralised in one or two people in all company.

2.3.3 Configure

The workflow should be configured after being instantiated, in other words, the *Super User* may attribute users to the different actions of a workflow. The user should select the option active so that the Workflow can be initiated. Besides the Workflow configuration, the user can configure the workflows, like Insert actions, Change Transition and the Execution Time.

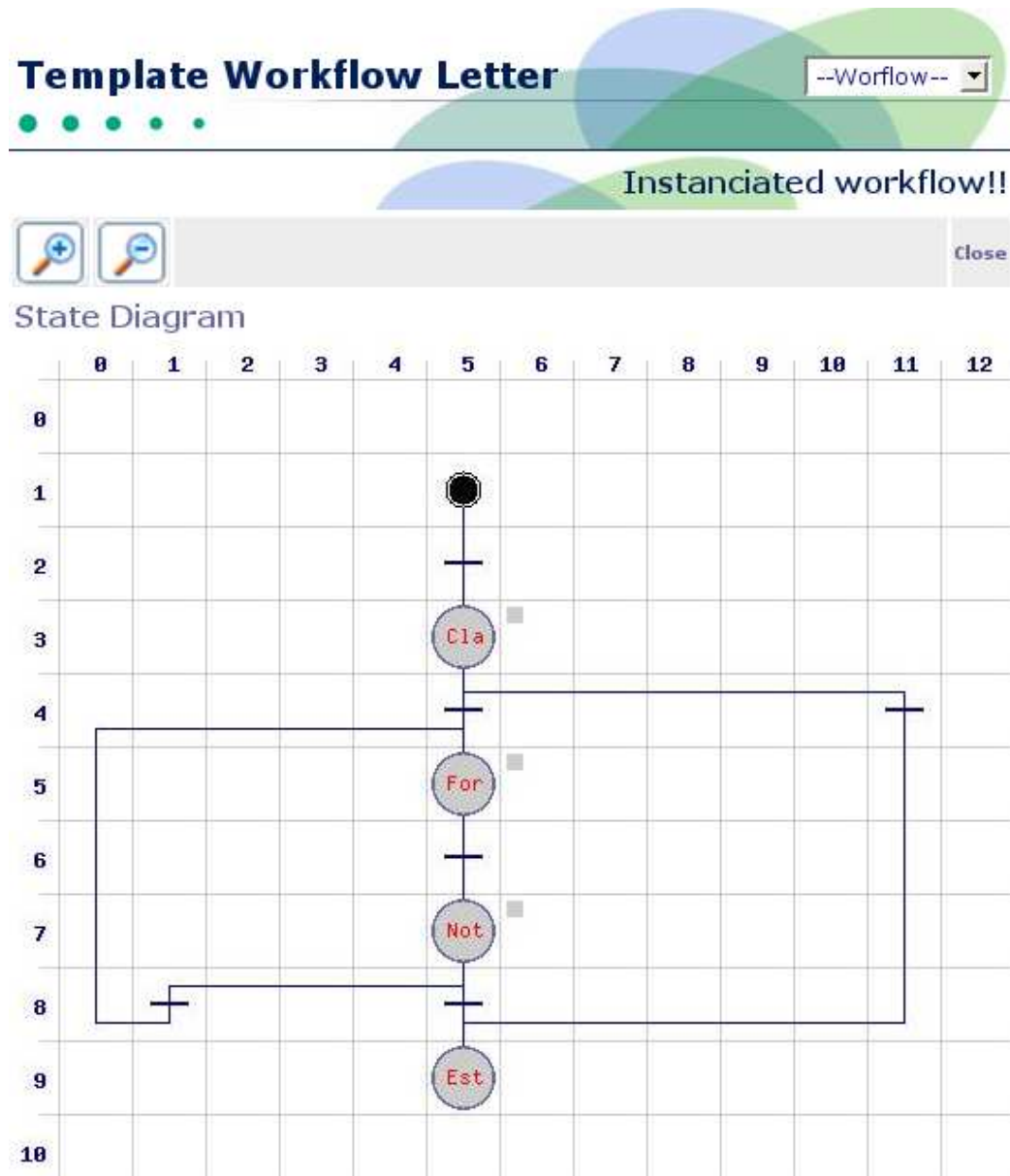


Figure 2.23: Example of a Workflow

The alteration of the attributed people is allowed in this function, even in the case where the workflow is being used. This functionality has also an option which maintains the permissions of the flow, only when the workflow is finished, for that end the user should select the option Permissions in the central frame of the Configure functionality.

2.3.4 Remove

A workflow can be removed as soon as it's not being used by any document.

2.3.5 Insert Actions

To insert an action in a state, the user has to specify which workflow and the state to which it belongs. The added actions will be the copies of an action that already exists, in other words, they shall have the same Action Code, Execution Time and Result. After insertion, the user shall reconfigure the workflow, in other words, attribute a user to the action created. When an action is inserted, the transition function between states is automatically changed, so the user should confirm if this transition is the one he intends.

2.3.6 Modify T.F. (Transition Funtion)

The transition function between states of a certain Workflow may be changed whenever the Super User needs it; however this action has to be carefully executed, once the good operation of the Workflow depends on it.

2.3.7 View T.F.

As previously mentioned, the transition functions alteration is a matter that requires some attention, and for that end an interface has been developed in which the user can easily visualize how the transition functions were defined between states of a Workflow.

2.3.8 Exec. Time

An interface was implemented where the deadlines for each workflow can be determined, because it's important that actions are executed within

well defined deadlines and so that everything may work properly in a company. Whenever there is only a week missing for the deadline of a certain action to end, the user responsible for it shall be informed by e-mail, and this situation shall be repeated on the day that the deadline ends. Despite the notifications, if the user does not execute the action on the following day after the end of the deadline, the *Super User* shall be notified of that fact by e-mail. The **Execution Time** functionality allows the configuration of the time that each user has to execute the action. By default, the user has 30 days to execute the action. However, this option can be changed. The Super User may give a certain term that is only valid on **weekdays**.

2.3.9 Assoc. Doc. Type

This functionality allows the association of a certain document to a workflow. This association is only used in the automatic introduction of documents via share of insertion, in other words, through the workflows introduction folders. This way, if the workflow is associated to a type of document, it will be automatically classified.

2.4 Menu Directory

To accede to all functionalities in this menu (figure 2.24) the user has to have at least a *Sub-coordinator* profile.

2.4.1 Modify

After inserting a certain directory its data may be changed, and to do that just accede to this option in the menu.

2.4.2 Create

The creation procedure of a new Directory/Section needs a previous selection of the Section. In this insert the one you wish to create. To select a Section just click its name, presented in the sections hierarchy, on the left side frame of the screen. When it is selected, the name appears in a different colour, similar to the documents. To create folders, the user should accede to **menu Directory** and choose the option **Create**. In the central frame

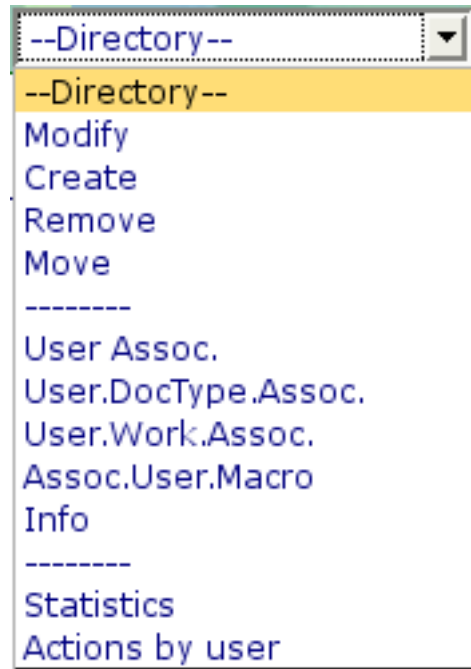


Figure 2.24: Menu Directory

the user finds a group of fields to fulfil in function of the folder he is creating. Besides the name, the type and the description of the directory, the user may define the order of the folder inside the directory.

2.4.3 Remove

Whenever a Section is removed, all data related to it are eliminated from the manager, namely, subsections, documents, associated users and respective workflows. To remove a section, the user has to be *Super User* or *Co-ordinator* in the same section.

2.4.4 Move

This functionality can only be acceded by the users with writing permissions in the destiny folder. This way, the user shall select the directory where he intends to move the folder previously selected. To move folders,

the user has to be a *Super User* or *Co-ordinator* in the destiny folder.

2.4.5 User Assoc.

This functionality allows associating users to the section selected. To enhance that, the same user may have distinct profiles, depending on the section, in other words, a user can be *Co-ordinator* in a section and *Reader* in another section. The fact that the profiles are attributed in the existing sections allows managing the documents in those sections. To create profiles, choose the option **Profile** in the **menu Definitions**.

2.4.6 User.DocType.Assoc.

This functionality allows associating the users to the types of documents created in the functionality **Doc. Types** of **menu Definitions** (figure 2.25). To create a new type of document accede to the option **Doc. Types**, in **menu Definitions**.

2.4.7 User.Work.Assoc.

In the Sections, each user can have several workflows associated, or none, depending on his functions in that section (figure 2.26). To create a workflow, accede to **menu Workflow** and choose option **Conceive**.

2.4.8 Assoc.User.Macro

The created macros can be associated to a user through this functionality. This way, macros already associated can also be disassociated.

2.4.9 Info

This functionality is accessible to all users which may visualise this Directory/Section. Here they may find information concerning the directory and the profile attributed to each user.

Associate Users to Document Types [Docs.](#)

Groups: Domain Users
User: Administrator
Profile: Super User

Doc. Types to Associate:

Award	↑
Brochures	
Budget	
Invoices	
Letters received	
Manual	
Não definido	
Presentations	
Price List	
Proposals	
Received faxes	
Sent Faxes	
Sent Letters	↓

☒ **(Recursive Association)**

Associate

Figure 2.25: Association of users to Types of Documents

Associate Users to Workflows [Docs.](#)

Groups: Domain Users
User: Administrator
Profile: Super User

Workflows to Associate:

Archive	↑
Costumer's Bills	
Fax	↑
Letter	↓

Associated Workflows:

Archive

☒ **(Recursive Association or Disassociation)**

Associate **Disassociate**

Figure 2.26: Association of Users to a Workflow

2.4.10 List of actions

This functionality is accessible only for the users with a *Super User* or *Co-ordinator* profile. When acceding to this functionality, the users may visualize all actions to execute according to their profile. This way, a user with a *Super User* profile may visualize all actions to execute by sections of the hierarchy and respective owners. As for the *Co-ordinator*, he can only visualize actions from the sections where he is a *Co-ordinator*.

2.4.11 Actions by user

This functionality allows executing searches concerning the users and respective actions to execute. When executing a search, select only the user you want to search, where all actions to execute return. You can also execute a search by action, where all users with the selected action appear. Searches executed with this functionality need a previous selection of a section in the hierarchy.

2.5 Menu Session

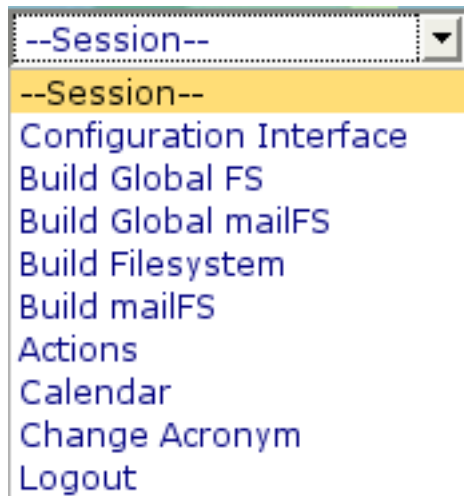


Figure 2.27: Menu Session

All functionalities in this Menu (figure 2.27) are available to all users, whatever their profile may be.

2.5.1 Configuration Interface

The user with a *Super User* profile can configure the interface in this option, where he can make changes, among others, in the logotype, modules, document data, printing or calendar.

2.5.2 Build Global FS

This functionality allows rebuilding all Virtual File System hierarchy, in other words, the hierarchy acceded via Windows Explorer, if that is the Operating System used by the clients.

2.5.3 Build Global mailFS

In this functionality the user rebuilds the hierarchy of the associated e-mails for all users.

2.5.4 Build filesystem

This functionality executes the global reconstruction of the User Area in the Filesystem, it rebuilds the file system from the area of the user which started the session in iPortalDoc.

2.5.5 Build mailFS

This option allows the reconstruction of the associated mails hierarchy from the user which started the session in iPortalDoc.

2.5.6 Actions

In this menu option the list of all actions that the user has to execute (figure 2.28) is presented in a new window.

Pending actions

--Actions-- --Document--

Listing by section: Yes No

Thursday, 28th of February 2008 Iportalmais /

Show pending actions

1 - 6 | Total 6 Actions

Type	Code	Title	Doc. Info	Deadline	Access to Action	Entity	Modify
>	ND_1/2008	cebit fax	+info	2008-03-28 12:59	Forward Fax	PME Par...	Modify
>	LR_1/2008	deutsche messe letter	+info	2008-03-29 10:53	Classify Letter	-	Modify
>	LR_2/2008	cebit letter	+info	2008-03-29 10:54	Classify Letter	-	Modify
>	PR_1/2008	Proposal for hardware and maintenance of IPBrick software	+info	2008-03-29 12:09	Make known the Proposal	Macbek	Modify
D	PR_2/2008	Proposal for IPBrick and iPortalDoc - 50 users	+info	2008-03-29 16:09	Make known the Proposal	Dual Te...	Modify

1 - 6 | Total 6 Actions

Figure 2.28: List of Actions to execute

2.5.7 Calendar

In the Calendar, a series of actions are allowed to the users through the links in the upper right side of the window presented. This functionality is described in **Chapter 3**.

2.5.8 Change Password

This option allows the user to change his data, namely his password and e-mail, if it's configured to do that.

2.5.9 Change Acronym

In this functionality the user can change or attribute initials to the user's name.

2.5.10 Logout

In this option the user ends his session in iPortalDoc.

Chapter 3

iPortalDoc User Guide

In order to have the best use of iPortalDoc and all its functionalities, the users responsible for its Administration should execute a series of previous operations, such as:

- Elaboration of the Sections/Directories hierarchy;
- Attribution of users and respective profiles, in the distinct Sections;
- Instantiation and Configuration of the Workflows to use;
- Attribution of workflows to the different users in each Section.

From the point of view of iPortalMais, the best option should be the recreation of the company's normal working, in other words, to organize iPortalDoc according to the company's daily activity. Thus, the several users' comprehension and adaptation to the system shall be easier.

3.1 Creation of a Sections hierarchy

The different sections and subsections in the document hierarchy on the left side of the *browser*, through the folders explorer or even through e-mail should reflect the departments/sections of a company. The documents related to the sections shall be inside them.

To create a section, the user should select the option **Create** of the **menu Directory** presented in the toolbar above the central documents exposition area. After selecting this option, the user shall see an interface in

the central frame where he shall introduce the directory name, select the directory type, a brief description and the order.

The directory type selection shall only report the choice of the icon/image preceding the name of the folder. As for the directory order, this shall vary between 1 and 200. If the user always maintains the same order, the subsections shall be alphabetically organized. The options **Remove** and **Modify**, also in **menu Directory**, allow deleting the section or changing any type of information inserted.

To build a hierarchy, the user should select the Section in which he wants to create Subsections. To execute this operation, the user should click the name in the intended Section in the list presented on the left side of the screen and execute the steps previously described. Whenever a section is selected, it shall have a different colour from the remaining sections, in this case, the green colour.

After the initial hierarchy construction phase, all users with permissions to create subsections, in a certain directory, may do it.

When a section is created, the profiles and workflows associated to the users of the superior Section are transferred to this one. However, these options can also be modified, in other words, the profiles and workflows associated to the Section do not have to be necessarily the same of the superior Section. These questions should be in accordance to the organisation's needs.

3.2 Attribution of users to a Section

A user with a *Super User* profile or a iPortalDoc administrator may introduce users through the presented interface, after selecting the option **Users** in **menu Definitions**, in Management. To do that, the users should be previously introduced in IPBrick, as described in **Chapter 1**, thus, presenting themselves as LDAP users.

To introduce a user in iPortalDoc, select the option **Users** in **menu Definitions**. When clicking this option, the users already associated to iPortalDoc shall appear, in case there are any. On the right side we have the option *Management*, which shall direct us to the screen where two boxes shall appear: one with the LDAP users and another one with iPortalDoc users. To insert a new user in iPortalDoc, just select it in the LDAP users' box and press the button *insert*. With this operation, a new user already selected in IPBrick shall be a user in iPortalDoc.

1 - 5 | Total 5 Users of 5 licenses [Docs.](#)

[List](#) | **Management**

Administrator
Isabel Tavares
Raul Oliveira
Susana Pinheiro
Telma Salgueiro

1 - 5 | Total 5 Users of 5 licenses

Figure 3.1: List of iPortalDoc users

iPortalDoc Users Management [Docs.](#)

[List](#) | [Management](#)

iPortalDoc Users:

Administrator
Isabel Tavares
Raul Oliveira
Susana Pinheiro
Telma Salgueiro

LDAP Users:

Administrator
Isabel Tavares
Miguel Leao
Raul Oliveira
Susana Pinheiro
Telma Salgueiro

« «

» »

Insert Remove

Figure 3.2: Introduction of users in iPortalDoc

In the same way, in IPBrick one may associate users to different Groups (for example: technical, commercial, account department, etc.).

Each iPortalDoc user should be associated to each Section with the profile most adequate to his function in that same Section. iPortalDoc has got some pre-configured profiles, as it was previously mentioned in **paragraph 2.2.2** in the previous chapter, however, many others can be created, if the administrators wish it. As we have seen, each profile is associated to different permissions, both in Sections and documents.

To associate a user to a section, the *Co-ordinator* of that section shall select it, and then accede to the **menu Directory** and click the option **User Assoc..** In this interface, the *Co-ordinator* should select the user and proceed to the attribution of the profile he thinks is the best, the opposite operation is also available, in other words, the disassociation of users, as it was described in the previous chapter.

3.3 Workflows Configuration

In **menu Workflow**, in the option **Create**, iPortalDoc enables a series of workflows. However, these workflows do not have to be necessarily used, new ones can be created or even change the existing ones. Either they are created (option Create), or modified (option Edit, after selecting the Workflow you want to change), it's necessary to understand that in order to use them, they have to be instantiated and activated. For that end, accede to **menu Workflow** and select the respective option.

To create a new Workflow, select the option **Create** which shall report you to a new screen, in which you should choose the name (fill in the *description* box) that best illustrates that Workflow.

After giving it a name, it should be edited through the option *Edit*. When clicking this option, a new window appears, in which the states corresponding to the needs of a certain Workflow shall be introduced (figure 3.4).

Afterwards, select state by state and attribute the action corresponding to that state, possible results and posterior attribution.

Finally, the user responsible for the creation of the Workflow should insert the Transition Functions between each state, and so creation and edition of the Workflow is concluded.

After the instantiation of a workflow, it should be configured through

Workflows Design[Docs.](#)

[List](#) | [Create](#) | **Edit**

Description:

No Attachment: ☐
(If selected, when inserting a document it will not be necessary to define a file.)

Figure 3.3: Workflows Creation

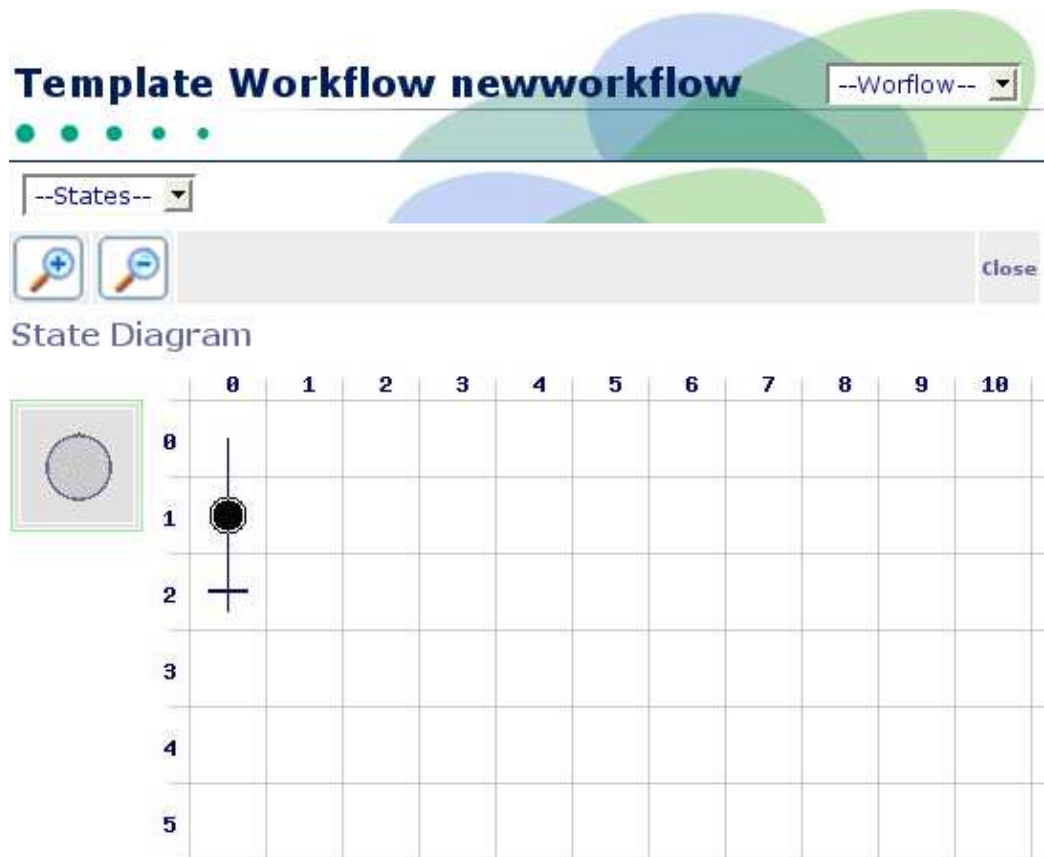


Figure 3.4: Workflow Edition

the option **Configure** from the same menu, in other words, users should be attributed to the distinct actions of that workflow.

A Workflow template may be instantiated several times, as soon as distinct descriptions are given to it. In the limit, all sections may work with the same workflow templates, and each flow is configured for the users associated to the section it is aimed for. On the other hand, the global use of a certain workflow is also possible. Configuration and use of a certain workflow only depends on the company's own internal policies.

As iPortalDoc aims the execution of tasks in pre-established execution times, each Workflow State has a 30 days execution interval by default. If the user wants to change it, he shall accede to option **Exec. Time**, from the menu we are working.

3.4 Attribution of Workflows to Users in the Sections

The associated users probably need to use different workflows in each section, and for that reason its *Co-ordinator* shall associate the workflows necessary to the functions of each user. This association is necessary, because it's not possible to insert a document in a section without selecting a workflow.

To associate workflows to users in a Section, the *Co-ordinator* has to select the Section and then accede to option **User.Work.Assoc.**, from the **menu Directory**. When acceding to this functionality, an interface is presented in the central frame, in which the user should be selected and the workflow(s) to attribute should be chosen. Workflows could be disassociated in the same way.

3.5 Document introduction

iPortalDoc has two ways of inserting documents:

- Via Samba (SMB protocol);
- Via Web (HTTP protocol);

So that a user can introduce documents via Web, he needs to have a profile with permission to do that and an associated workflow in the section

Workflow Configuration [Docs.](#)

Workflows: Fax
Description: Fax **Active:** ☒
Permissions: ☒
(If selected, in the end of the workflow, the document will keep the flow permissions.)

State : Classification <input type="button" value="v"/> Level : 0 <input type="button" value="v"/>				
Actions associated to state :				
<table><tr><td>Classify fax</td><td>Raul Oliveira <input type="button" value="v"/></td></tr><tr><td>Classify fax</td><td>Isabel Tavares <input type="button" value="v"/></td></tr></table>	Classify fax	Raul Oliveira <input type="button" value="v"/>	Classify fax	Isabel Tavares <input type="button" value="v"/>
Classify fax	Raul Oliveira <input type="button" value="v"/>			
Classify fax	Isabel Tavares <input type="button" value="v"/>			
State : Forward <input type="button" value="v"/> Level : 1 <input type="button" value="v"/>				
Actions associated to state :				
<table><tr><td>Forward Fax</td><td>Raul Oliveira <input type="button" value="v"/></td></tr><tr><td>Forward Fax</td><td>Isabel Tavares <input type="button" value="v"/></td></tr></table>	Forward Fax	Raul Oliveira <input type="button" value="v"/>	Forward Fax	Isabel Tavares <input type="button" value="v"/>
Forward Fax	Raul Oliveira <input type="button" value="v"/>			
Forward Fax	Isabel Tavares <input type="button" value="v"/>			
State : Reading <input type="button" value="v"/> Level : 2 <input type="button" value="v"/>				
Actions associated to state :				
<table><tr><td>Read fax</td><td>Subsequent Assignment <input type="button" value="v"/></td></tr></table>	Read fax	Subsequent Assignment <input type="button" value="v"/>		
Read fax	Subsequent Assignment <input type="button" value="v"/>			
State : Estado final <input type="button" value="v"/> Level : 3 <input type="button" value="v"/>				
Actions associated to state :				

Figure 3.5: Workflow Configuration

where he wants to execute that action. Chapter "3.5.2" - "Introduction of documents via Web" explains it better.

3.5.1 Introduction of documents via Samba

iPortalDoc has a directory, acceded through Windows Explorer, if that is the Operating system used, that is divided into sub-directories, one for each existing documental flow (see figure 3.6). The user may directly introduce a file in a sub-directory via SMB, associating the file to the corresponding documental flow. This action is only allowed through the *Insertion* folder of Windows Explorer.

It's used a program that executes a sample of the files in the areas minute by minute, analysing the alteration in its size. If between two consecutive samples the size of the file stays unchanged, it implies that the transference of the file is concluded, and it's automatically introduced in iPortalDoc. The document generated shall be identified by the document flow with the name of the file and it shall be conducted through the different phases of the associated document flow. The document shall be organized in a document flow/year/month/day structure, to facilitate the identification of the documents automatically inserted.

3.5.2 Introduction of documents via WEB

When the user selects the operation **Insert** from the **menu Document**, he accedes to a interface which allows him the introduction of a document. **Always make sure that you are working in the section you want, the section shall appear selected in green.** When a document is introduced via Web, the user may insert a series of information that may help to catalogue and to differentiate a document from another one, besides the selection of workflow it shall explore. Some fields only have as a goal to catalogue the document and, thus, facilitate its subsequent retrieval, such as keywords, description and summary. However, there are required filling fields for the introduction of a document: title, type of document and the workflow to use. If it's not intended to introduce a document based on a template created, it's also necessary to indicate the location of the file in the option with that same name.



Figure 3.6: Sections Hierarchy – Document introduced Via SMB

3.6 Documents Classification

A document in the Document Management System should be duly classified, so that it may be easily found through the search engine (search). In the introduction, alteration or update of a document the respective forms have got a group of fields which correspond exactly to the group of attributes the document may have in the system.

A correct connection of the documents to the sections (Through the Introduction of documents, or when they have already been introduced, through the Connection of Documents to section), with the correct associations of documents (for example, proposal to adjudication, order to invoice, etc.), allied to the correct filling of the available attributes, allows the document to be correctly classified in the system.

Principal documents classification means:

- **Keywords** - Allows the identification of documents through a defined group of keywords pursuant to the company's policies.
- **Entity** - Allows associating the documents to a certain entity.
- **Document Type** - Allows the identification of documents of a certain type.
- **Workflow** - allows the classification of documents by a defined flow type.

When this process is executed, the user can easily find the document through the *Quick Search engine (QS)* or, when the search is restrained, through the *Advanced Search engine (AS)*. In quick search, the search is first executed by keywords, then placing the search by titles, summaries, descriptions and authors. In advanced search, you can specify the options to search a document: type of entity, entity, subject, type of document, workflows and workflow state, author, introduction and elaboration dates, document code, with occurrence of words in titles, summaries, descriptions, keywords and authors.

Example of the classification of a document inserted via WEB If a Fax is received from Client "X", whose addressee is "Engineer Y", with the subject Adjudication of a hardware proposal, the document should be introduced in the section concerning the Faxes from Client "X" or in a general Fax section and classified as:

- Entity Type: Clients (already defined in the system through the option Types of Entities in menu Definitions).
- Entity: X (already defined in the system through the option Entities in menu Definitions).
- Contact: Eng. Y
- Document Type: Fax
- Workflow: Fax (if this is the name of the workflow used for the document)

- Title: Hardware adjudication
- File: execute the fax upload
- Summary: adjudication of the hardware proposal
- Description: (it could have a more detailed information of the document, for example, a short description of the material)
- Physical storage: Folder2/2004 (it corresponds to the document paper archive, if any)
- Keywords:

adjudication
hardware

After introducing the document, it shall be associated to the respective proposal through the **Associate** functionality.

Example of the classification of a document inserted via Samba

Suppose that the situation is similar to the one previously described, except for the fact that the fax is now automatically introduced in the system. In this case, the document shall stay in the section Fax/year/month/day (structure automatically created by the system). The classification of this document shall have to be executed through the functionality Change Info, in the Menu Document. After classifying the document, it shall be associated to the respective proposal through the “Associate Documents” functionality with or without search, which can be acceded to through the Menu Document. If there is a section for Client “X”, the document shall be connected there.

3.7 Select Document

To select a document, the user should click the image presented on the left side of the title (figure 3.7), in the list presented in the central frame of iPortalDoc. Whenever a document is selected, its title appears with a different colour and the image before the title is also different. As previously mentioned in paragraph 2.1 from the previous chapter, most functionalities from the **menu Document** need a selected document. You can only select one document at the time.



Figure 3.7: Example of a document selection

3.8 Document References

Each document inserted in iPortalDoc is referred through the:

- section in which it was introduced, and to which it was afterwards connected;
- code (automatically) attributed at the moment of insertion, depending on the type of document chosen by the user;
- entity associated to the document;
- keywords inserted by the user;
- association of other documents.

3.8.1 Link Documents to Sections

A document may be connected to other Sections after reaching the final state of the workflow associated to it. To accede to this functionality, the user should select the option **Link** (and not Link Docs.) from menu Document and in the interface in the central frame select the box on the left side of the Section name where he intends to connect the document, in other words, select the section to which he intends to send the document. The sections, where the document is already connected, are presented in a different colour in this interface.

3.8.2 Attributed Codes

Whenever a document is inserted, a code is given to it, which is generated and is unique, but it depends on the type of Document that the user

has selected. The document code includes the initials defined for each Type of Document, the year in which it was inserted and the number of documents for that Type, in the year in question. The documents inserted via Samba are given a code that corresponds to the name of the workflow with which these have been inserted. To create new Types of Documents, the *Super User* should accede to the option **Doc. Types** in **menu Definitions**, and it's necessary to give a name which is not being used to the new type of document (fill the Description box), choose the initials, attribute a template to the new type of document or choose a document of direct introduction.

Document Types Management

Docs.

Document Types:

New Type

Description:

NewDocType

Acronym:

NDT
(Acronym that will be used in the document code generation)

Code:

--Code--
(Document code format)

Codes Management

Automatic template generation :

Direct introduction

Permission - Doc. Type:

☐
(When selected, allows to modify document type and code assigned to a document)

Permission - Info:

☒
(When selected, allows to modify document information, during workflow)

Modify information:

☐
(If selected, does not allow the modification of document information)

Register Type:

☐
(If selected, does not allow document update)

Insert

Figure 3.8: Creation of a Document Type

3.8.3 Associated Entity

When introducing a document, the user can associate an entity, for example, a fax from entity x. The management or introduction of entities is made, aside, by IPBrick, in contacts. For that, the option **Entities** in **menu Definitions** should be selected. This operation shall open a new window that allows visualizing the entities alphabetically, filtrating or seeing them all. It also allows introducing new entities, through the option *Insert*. These steps are duly explained in **Chapter I** in the Users Management section.

3.8.4 Keywords

When introducing a document via Web, the user has a field named Keywords, in which he should write the words through which he can afterwards easily search the document. One should choose words which easily identify the document, for its subsequent retrieval. The redundancy of keywords between documents should be avoided so that the search of documents may be faster and more efficient, in other words, there should not be many documents with the same keywords. To search a document, the user should write the word to search in the text box on the upper right side of the screen. During this operation, all documents of the selected section and for which the user has reading permission shall be examined, searching for a sequence of characters in the document keywords that correspond to the user's search. The user can also use *Advanced Search*. This functionality is acceded through the *link* on the upper right side from the Search window. *Advanced Search* allows the user to execute his search in several fields.

3.8.5 Association between documents

A document can be associated to other document, for example, an invoice should be associated to a proposal. To accede to option **Associate without search** in **menu Document**, the document selected has to be finalised, in other words, at its final workflow state. As we have already seen in the previous chapter, it's possible to associate with or without search. In the interface presented in the central frame of iPortalDoc (figure 3.9), select the box on the left side of the document to associate, and if the users with reading permissions in that document may see the document selected, the Bi-directional relation should be attributed, and for that just click the

corresponding box.

Documents association
[Docs.](#)

Selected Document: iPortalDoc's Brochure

Directory: /Iportalmais/Comercial/Marketing

Select documents to associate:

Iportalmais	Code / Relation type
Fax	
Mailing	
Administration	
Human Resources	
Clients	
Comercial	
Marketing	
<input checked="" type="checkbox"/> IPBrick GT Brochure	Br_2/2008 <input checked="" type="checkbox"/> Bidirectional
<input type="checkbox"/> IPBrick IC Brochure	Br_3/2008 <input checked="" type="checkbox"/> Bidirectional
Presentations	
Price lists	
Proposals	
Financial	
Manufacturers	
Partners	
Suppliers	
Technical	
Help	

Figure 3.9: Documents Association

3.9 Permissions related to a document

A document has got two distinct phases of permissions on itself, attributed to the users:

- During the workflow;
- After the end of the workflow.

3.9.1 Active Workflow

During workflow only the users intervening in that process have permissions on the document, besides the *Super Users* and the *Section Coordinators*. Each time a new workflow action is activated, the user who shall execute it has permissions on the document.

Sometimes a user without permissions to accede to a document needs them during workflow. To attribute permissions in the conditions previously mentioned, it's necessary to forward the document in question, through the option **Forward Doc.** in **menu Document**. This action can be executed by any user with permissions on the document and it shall be registered in the workflow record.

During workflow, whenever a user has to execute a action, he is notified through an e-mail sent by iPortalDoc.

The workflow record and associated information may be acceded to through option **Workflow Doc.** in **menu Document** or in **+info** when the document is selected. In the presented window there are several *links* on the upper right corner to accede to the number of revisions, associated documents, editions and other type of information regarding the selected document.

3.9.2 Completed

Permissions associated to users, regarding a document completed, depend on the profiles each user has associated in the section where he intends to visualize the document. However, it's possible to change the specific permissions for a certain document inside a section. Thus, a user with a profile different from a *Co-ordinator* or a *Super User* can stop seeing a document, despite the fact that his profile has permissions to do it. To execute a operation like the one previously described, the *Section Co-ordinator* should accede to the option **Permissions** from the **menu Document**, with the respective document selected, attributing or removing permissions to a certain user, then clicking *submit*.

A description of all permissions attributed to the users associated to the section shall be presented in the central frame. When clicking the link on the upper right corner of the frame, **Docs Permissions**, you can visualize the permissions concerning the document selected, and it's possible to change it. In this interface, the users with *Super User* and *Co-ordinators* profiles area signalled with the letters A and C respectively (these users' permissions cannot be changed).

3.10 Creation of Templates

Whenever the organisation needs justify it, it's possible to create pdf models, which may be very useful, for example, for meeting minutes, invoices, faxes, among others. These templates are mainly related to the graphic aspect of the document, so iPortalDoc offers the possibility to introduce different types of fields (editor, box, formulas, steady image, pre-inserted or steady text), as well as tables, pop lists or others.

To create a pdf template select the option **pdf Template** in **menu Definitions**. A list of all templates shall appear in the central frame. To create a new model select the option *Template*, introduce a name and click *Insert Template* and, finally, *Edit*. To change or simply consult an existing template, select it and choose the option *Edit*. In both cases, a new window appears where the template shall be elaborated. Then, the Templates edition functionalities shall be detailed.

3.10.1 Templates Edition Menus

The first option in *Menu Fields*, **Editor**, allows the user to create a text box, and to choose the number of lines available for the text edition.

The option **Box** is different from the previous element because the text area is limited to a line, and it's useful for small amounts of information.

The third option, **Formula**, enables the execution of mathematical calculations, using the data from the boxes.

The **fixed image** field is useful if the user intends to insert an image in the document.

The **pre-inserted** element allows gathering the existing data in IP-Contacts concerning a certain entity, as well as the automatic generation from the responsible for the elaboration of the document, elaboration date,

code or document title. For example, if the user intends that the address of a certain entity appears in a template, he only has to select that option and choose the variable *Entidade - Address*.

The last option in *Menu Fields*, **fixed text**, is used to place inalterable text in the template, which shall appear whenever a new document is created.

If you want to insert a **table** in the document, select the menu with that name. First, when selecting the option items, it's necessary to choose the name for the table and only then the fields and the table columns shall be asked.

The creation of a **pop list** allows the creation of a field that conjugates several variables, and the creator of the document can only choose one of the options. There are two types of pop list, in the first, when the template is created, the user shall have to insert all possible variables. In the second there is a group of pre-inserted variables.

The *Menu Others* allows the introduction of headers and footers, paragraphs and fields aligning.

The *Menu Template* allows to preview the document and/or form. When the document is completed, it should be generated through the option Generate. Before generating, the beginning and the end of the paragraphs/headers/aligning should be carefully seen, for all options opened, should be closed. To generate a template it's necessary that this has a type of document associated. As we have seen, for that purpose select the option Doc. Types in menu Definitions and insert a new type of document with a new description and initials and select the template created in the Template of automatic generation option. Thus, a document based in the intended model shall be created when a new document is introduced with the type of document associated to a template.

3.10.2 Changing formatting

The alteration of a template formatting implies a slight knowledge about XLS-FO. Thus, it's possible to change the complete formatting of a template, as the type of letter, colour of the letter or of the lines in a table, etc. To accede to this functionality, after generating the template, select the option *Download* in **menu Template**, in XSL File. Then, it shall be necessary to indicate the destiny to save the file with the XSL extension, and so, it's possible to change it. At the end of each alteration, to update the document, select that same option in **menu Template**.

It's only possible to visualise the alteration of formatting when a new document is inserted.

3.10.3 Creation of Reports

To enhance the possibility to create reports based on data from the internal or external Database, in Oracle, SQL Server, Postgres or mySQL. This operation is possible through the option **Configure external DB** in **menu Template**. So, to configure the database, fulfil the data concerning the name and server port, database name, user and keyword. Thus, the options to create the dynamic and variable Pop list appear, as well as the dynamic table, in the menus Pop list and Table respectively. So, it shall be possible to execute searches, through the SQL queries, consulting the database information and, thus, creating the reports.

3.11 Calendar

When acceding to option **Calendar** in **menu Session** (figure 3.10), a window appears and in its upper part are the following menus:

- **Go to** - navigation options;
- **Admin** - configuration options;
- **All** - list/search by categories;
- **Year** - allows the selection of the year between 2003 and 2010.

In all interfaces presented by the Calendar, depending on the state of the scheduled events, they have the following colours:

- light blue, events with an expired date;
- blue, scheduled events, but not confirmed by all intervening parts;
- red, scheduled events, but refused by the intervening parts;
- yellow, scheduled events confirmed by all intervening parts.

Whenever a user selects a certain event, an interface is presented and it presents all data concerning an event, and if the user has scheduled that event he is allowed to change or remove it. If the user is only one of the intervening parts, and he has not yet confirmed his presence, he can do it in that interface. When a day is selected, a view is presented with all events scheduled for that day, in all interfaces of the Calendar. Whenever a user receives an invitation for a certain event, it shall appear in his mail box. The same shall happen with the user who has scheduled that event, who shall receive the confirmation or not of the remaining intervening parts by e-mail.

3.11.1 Menu Go to

This menu offers some navigation options between My Calendar, Unapproved Events, other user Calendar, search, introduction of events (Add new entry) and list of appointments.

A list of all events the user has scheduled appears when you select the option **See Appointments**. The list has navigation from ten to ten events, and the events with current date are presented, or the ones close to that date, when the user accedes to that interface. To schedule a new event, through the option **Add new entry**, the user should choose first the participants, moving them into the table on the right. After selection, he should click the button **See Calendar** to schedule the hour. Then, there is an interface that allows inserting or changing the following data: description (short and complete), date, hour, duration, priority, access (confidential/public), category, option send reminder, location, participants, calendar owner, options concerning repetition and frequency. By default, each event has two hours duration, and the user can change that time interval. Whenever an event is scheduled, the intervening parts are notified through e-mails sent by iPortalDoc.

3.11.2 Menu Admin

The options in this menu are configuration options. So, this menu allows configuring categories, editing or activating layers, as well as defining the assistants and their permissions.

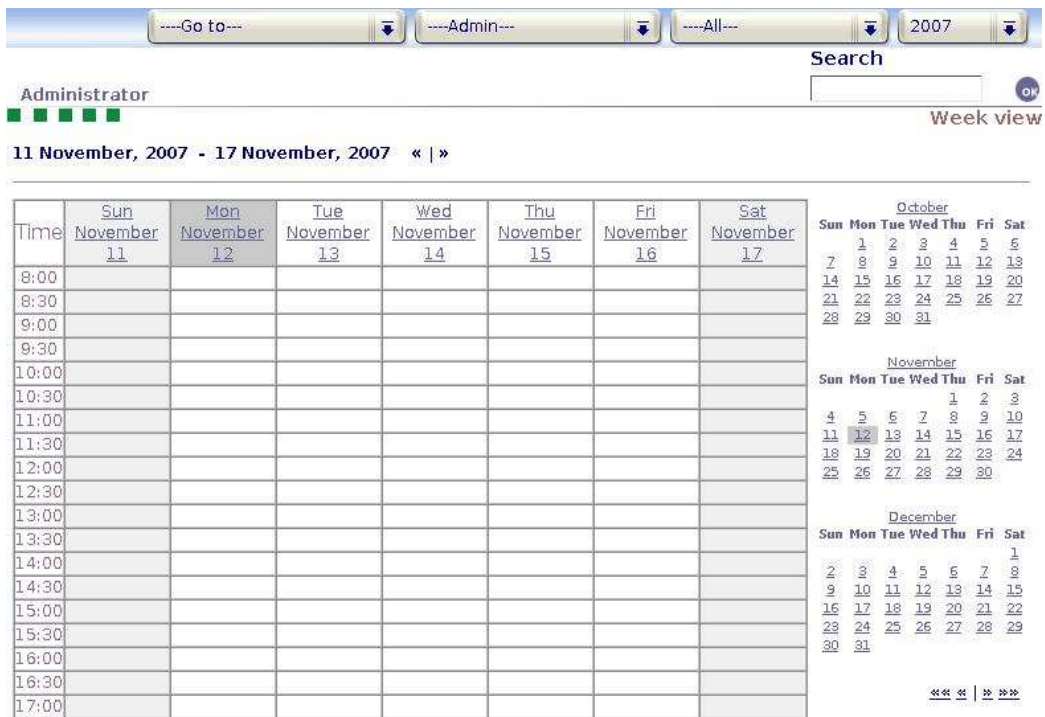


Figure 3.10: iPortalDoc's Calendar

3.11.3 Menu All

The categories defined in option **Categories** in **menu Admin** are the options in **menu All**. This menu allows, through the choice of a category, presenting the corresponding events in that extent.

3.12 Actions to execute by the User

As it has already been mentioned, whenever the user needs to execute an action in iPortalDoc, he is notified by e-mail. In the e-mails sent with that purpose there is a link, so that the user may accede to the **Actions** window. This window may also be acceded through the **menu Session**. A list of the actions ordered according to its urgency is presented in this interface. The actions, that should have already been executed, appear in red.

Each action listed in this window has a *link* that depending on the type of action, Document or Event, accedes to different interfaces. If the action to execute corresponds to an event, the *link* shall give access to the interface Scheduling Events in the **Calendar** and the user can or cannot confirm his presence in that event, as previously explained. To execute an action concerning a document workflow, depending on the type of action to execute, a different interface is presented. However, a text area is always presented so that the user can write a comment concerning the action to execute.

The access to the comment written by the user, in other words, the visualisation of the comment of an action in the workflow record, depends on what the user selects in the pop list presented in each action, called Access to the Comment. Only the users belonging to the group selected can read the comment in the record.

Whenever a user receives a notification of the need to execute an action from the workflow, he can accede to the comments placed in the actions executed in the previous State of the same flow.