



**Docdil Document  
Management 19.2**

**User Guide**

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# Docdil DM - User Guide

## About Docdil DM 19.2

Docdil Document Management is Docdil's open source document management application, based on our open source ECM platform, Docdil EP. Docdil DM provides organizations with the application they need to enable their teams to work more efficiently either on a project-basis or on longer term business processes.

This user guide provides information and step-by-step instructions to help you use Docdil DM. Collaborative work takes place in workspaces, where you can create documents, share and edit them. When documents are ready for distribution, you can publish them in sections, which are the spaces devoted to content distribution.

For administrators, the integrated Admin Center provides tools to manage, monitor and extend the application with plugins and customizations.

You can share your experience or ask your questions on Docdil Answers.

## Docdil DM 19.2 User Guide

- [Docdil DM's concepts](#)
- [Browsing content in Docdil DM](#)
- [Working in workspaces](#)
- [Working in sections](#)
- [Managing Docdil DM](#)

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## Docdil DM's concepts



Docdil DM is Docdil's open source document management application. It distinguishes collaborative work and content distribution.

The general concept is this: documents are created, edited, possibly approved in workspaces. When finished, they are published in sections. When obsolete, they're unpublished from sections. Actions users can perform on documents are determined by access rights given by spaces managers. To encourage collaborative work and information sharing, Docdil DM proposes several collaborative services, such as forums, blogs and websites.

## Available spaces

Collaborative work takes place in **workspaces**, where users can [create](#) and [edit documents](#). [Workspaces](#) are designed to make capture, sharing and editing of documents easier using desktop integration features, [comments](#), [annotations](#). In the mean time, [documents history and versioning](#), [relations](#), [workflows](#) and [alerts](#) enable you to build a coherent and controlled documents structure.

To help users create the workspaces in which they work, you can create workspaces **templates** and prepare the structure that will be applied to workspaces used in [template-based workspaces](#).

When documents are finished and ready, they are published in **sections**. Traditionally opened to a wider audience than workspaces, sections are dedicated to content distribution and communication and are designed for content consultation. That is why you won't be able to change documents (edit or move them) in sections : documents published in sections are frozen versions of workspace documents. [Publishing](#) is controlled using a workflow, that requires publishing requests to be [approved](#) so documents can be seen in sections.

Sections, workspaces and templates are grouped in domains. A domain can be considered as a mini-application in Docdil or a root in the application. Typically you can use domains to open the application to 2 or more very different populations of users. For instance, you can have an "intranet" domain and an "extranet" domain. Domains are can be totally independent or not, depending on the access rights you set on each domain.



### Docdil DM 19.2.2 main tabs

On Docdil DM 19.2.2, three main tabs are available on top the of the page, that give access to three environments.

- The Document Management tab is the main tab. This is where the majority of user's activity within Docdil DM will occur since it's where users can work on documents and browse your application domains, workspace, sections, etc.
- The **Home** tab is were users can find all the information that concern him: his dashboard to get a quick access to documents, and that he can customize with internal and external gadgets, the summary of his notification subscriptions, see his profile, etc.
- The **Admin Center** tab, accessible only to the application's administrators and from which they can [manage the application](#).

## Access rights


Access to documents and the actions allowed are determined by access rights. Some users will then be allowed to only read documents, when others will be able to edit documents or to manage spaces and documents.

The available access rights are:

Right	Actions in workspaces	Actions in sections
Read	Consult content Comment documents Annotate documents Tag documents	Consult content Comment documents Annotate documents Tag documents Submit documents to publishing
Write	Create documents Edit documents Add / remove relations Start a workflow + Remove actions + read actions	Create sections + read actions
Manage	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + write and read actions	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + write and read actions
Remove	Delete documents (this permission is included in <b>Write</b> right)	Delete sub-sections (this permission is included in <b>Write</b> right)
Can ask for publishing		Submit documents for publishing (this permission in included in <b>Read</b> right)

Comment	Add comments on <a href="#">websites</a>	
Moderate	Moderate comments on <a href="#">websites and blogs</a> if moderation is set to "Beforehand".	

Access rights are given on folderish spaces (workspaces, sections, templates, domains, but also folders, blogs, websites etc) and are inherited in the sub-spaces.

 On a standard Docdil DM application, members are all granted 'read' right at the application's root by default.

## Groups of users

To make access rights management easier, you can [create groups of users](#). Instead of giving (or denying) access rights to single users and repeat the same operations several times, you can give several users the same right in one single manipulation by using a group.

Default groups are:

- *administrators*: users in this group are the administrators of the application. They are in charge of managing the application and can access the Admin Center, edit the vocabularies, manage users and groups, and manage the themes applied in the application.
- *members*: users in this group are the non-administrator users of the application.

 Users must be in one of these 2 default groups to be able to access content.

You can [create](#) as many groups as needed.

## Related pages

 [Working in workspaces](#)

 [Docdil DM's concepts](#)

## Browsing content in Docdil DM

To help you find accurate documents, Docdil DM features several different ways to access documents:

- The different navigation trees, the tag cloud, or the dashboard enable you to [browse content according to different axis](#).
- You can also use the [simple](#), [faceted](#) or [advanced search](#).

For each of the available means to access documents, you can [customize the informations displayed](#).

## Access content

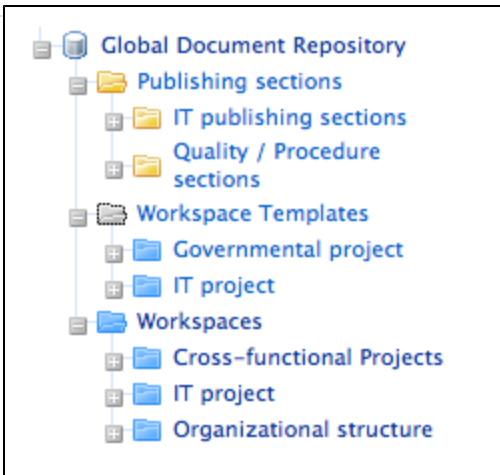
There are different ways to access content in Docdil DM. You can either use one of the navigation trees available, the tag cloud or your dashboard.

### Navigation trees

Several navigation trees are available so that you can access your documents either by going through folders (physical navigation) or using virtual navigation.

#### Navigation through folders

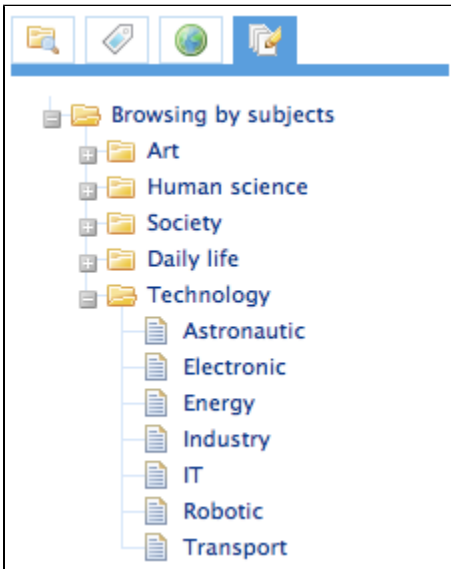
The default navigation tree displayed on the left hand side of the pages is the folders navigation tree. It displays all the domain structure from the root. It enables you to easily access any space in the application structure.



### Virtual navigation

Another way to access documents is using virtual navigation. Virtual navigation consists in using a navigation tree based on metadata to access documents. Metadata are informations about the documents, like the document's theme for instance, or its last modification date.

By default, two virtual navigation trees are available in Docdil DM: geographical cover navigation tree and subject navigation tree. You can use them for instance to access all the documents about the IT subject.

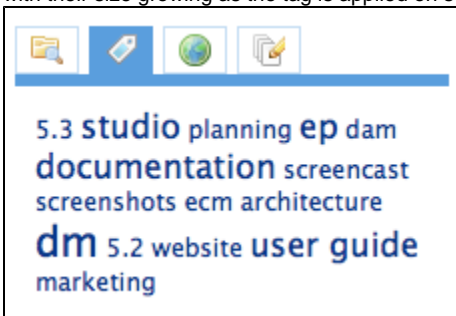


You can replace or edit existing virtual navigation trees with you organization's own vocabularies. Thus, you'll be able to adapt Docdil DM to your organization's structure and way of working.

See also pages [Editing the document's content and metadata](#) and [managing vocabularies](#).

### Tag Cloud

Docdil DM includes tagging of documents, which enables you to apply your own labels on documents. The tag cloud lists all tags on documents, with their size growing as the tag is applied on several documents.



To see all documents tagged with the same label, click on the tag in the tag cloud.

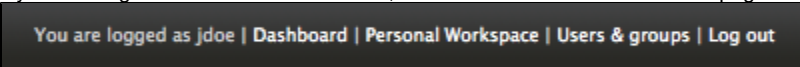
## Dashboard

You can also access documents using your dashboard.

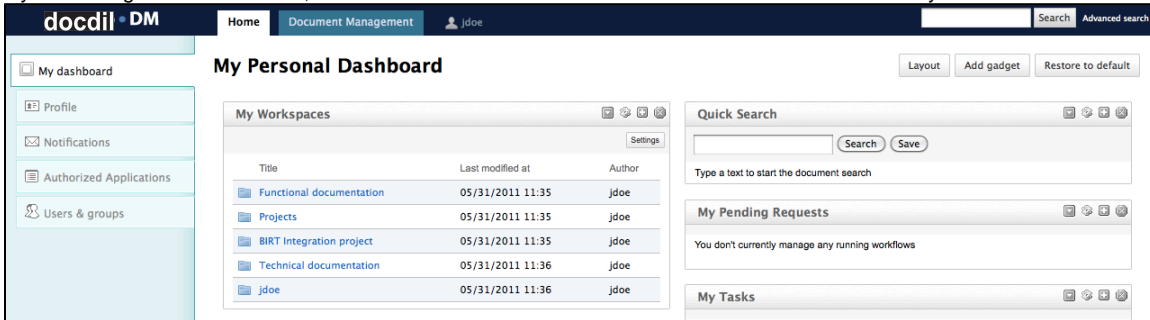
Every user has a dashboard that he can [customize](#). The purpose of the dashboard is that the user can have a summary of the application's activity on one page.

To access your dashboard:

- if you're using Docdil DM 19.2.0 to 19.2.1, click on the Dashboard link in the page header.



- if you're using Docdil DM 19.2.2, click on the Home main tab. Your dashboard is the default tab of your home.



## Change content presentation

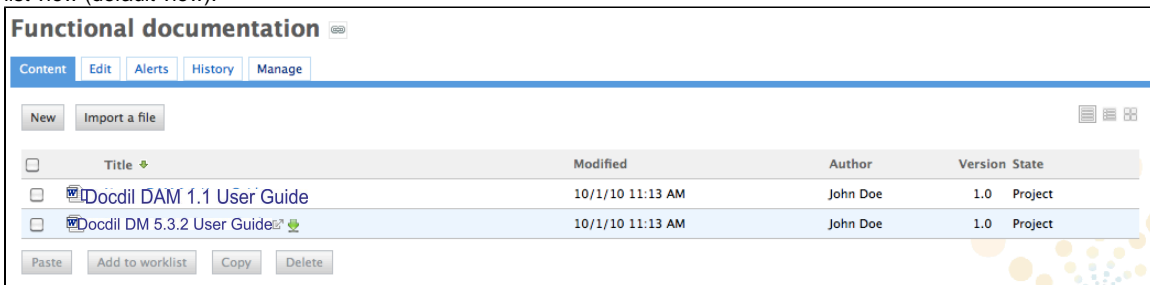
You can change the way content is presented:

- in the folderish repositories (workspaces, folders, sections)
- in your dashboard

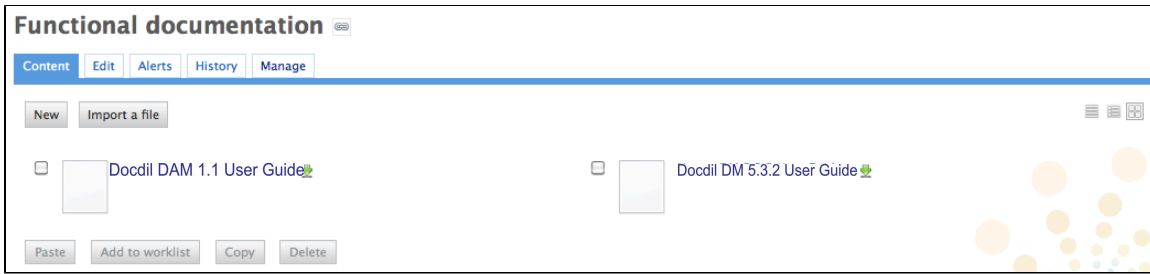
## Presentation options in folders

Different views of the content lists are available in workspaces, folders and sections:

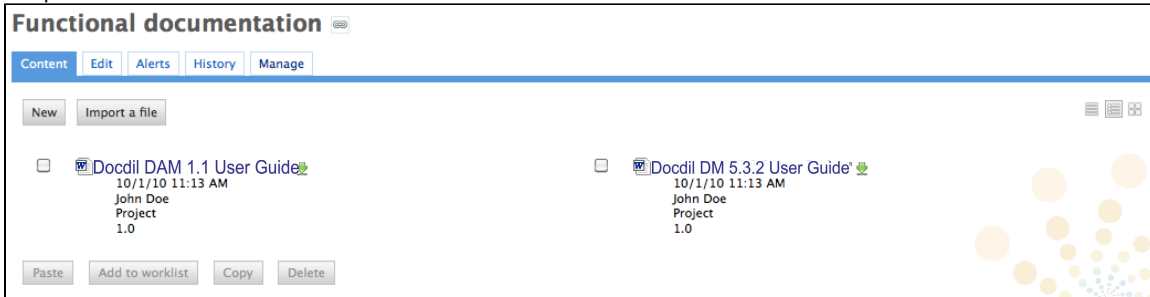
- list view (default view):



- icons view:



- compact view:



To change presentation, click on one of the icons displayed on the top right corner of **Content** tab:

- list view icon:
- icon view icon:
- compact view icon:

## Customize your dashboard

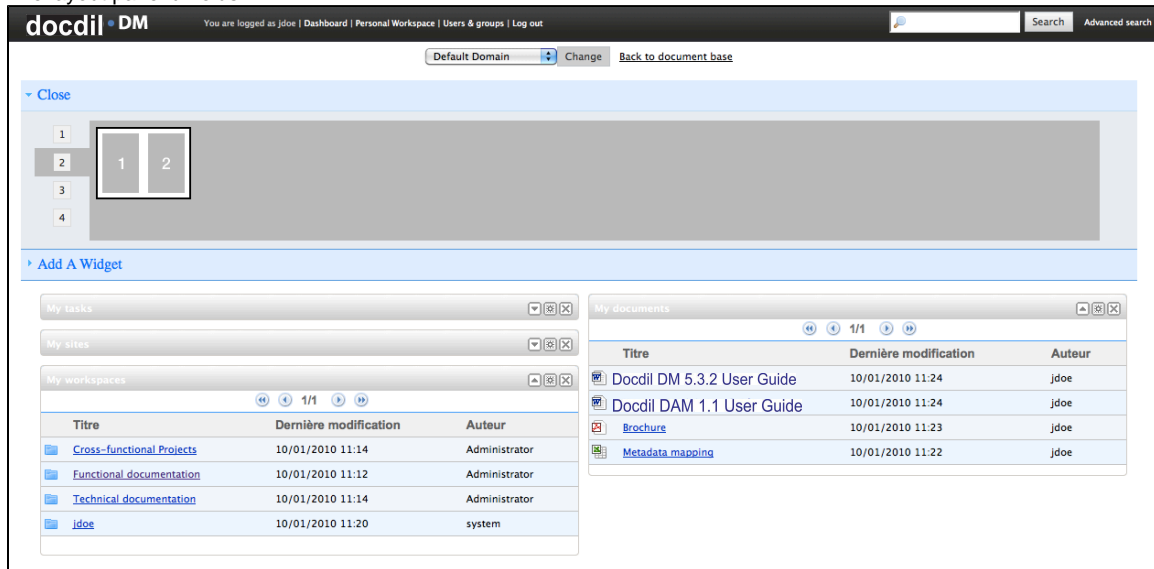
When you customize your dashboard, you can change the layout of the page, but you can also add, remove and edit the widgets displayed.

### Change dashboard layout

Depending on the version of Docdil DM you are using, the steps to change the dashboard's layout are not exactly the same.

#### To change your dashboard's layout on a Docdil DM 19.2.0 to 19.2.1:

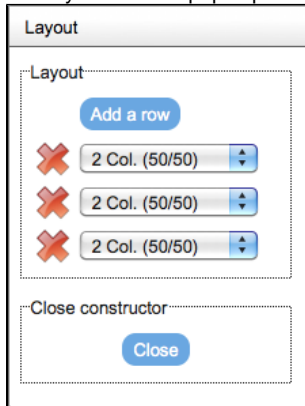
1. From your dashboard, click on **Change layout**.  
The layout panel unfolds.



2. Click on the layout you want to apply for your dashboard.
3. Click on **Close**.  
The chosen layout is immediately applied.  
Now you can reorganize your widgets in this layout.

### To change your dashboard's layout on a Docdil DM 19.2.2:

1. From your dashboard, click on **Layout**.  
The layout window pops up.



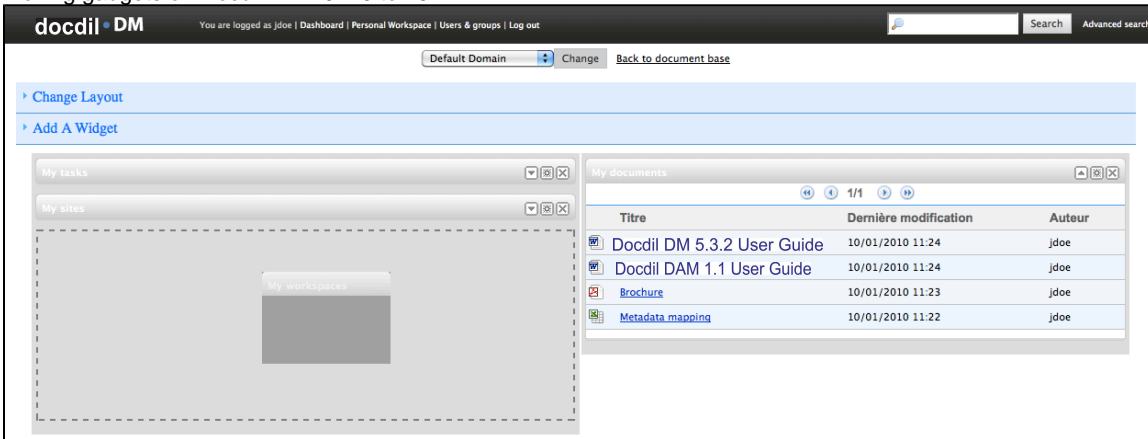
2. Determine the layout of your dashboard by adding or removing rows and selecting the columns proportions inside each row.
3. Click on **Close**.  
The chosen layout is immediately applied.  
Now you can reorganize your widgets in this layout.

### Organize your widgets

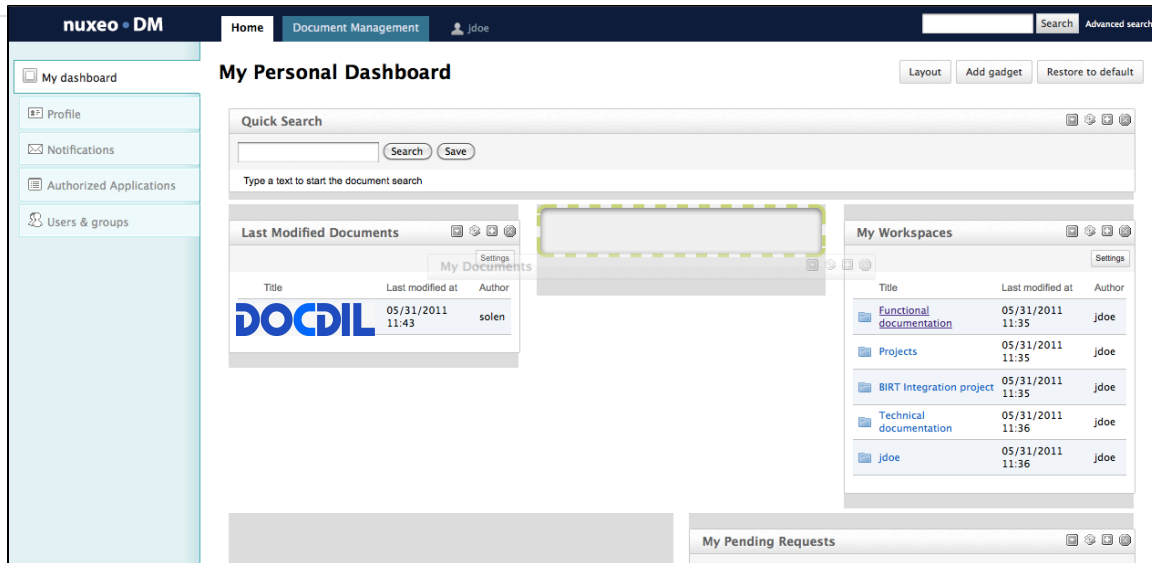
You can organize widgets the way you want in the applied layout. You can thus move widgets from a place to another (in another column, at the bottom or the top of the page, etc).

To move widgets, drag and drop them from a place to another.

Moving gadgets on Docdil DM 19.2.0 to 19.2.1:



Moving gadgets on Docdil DM 19.2.2:



✔ You don't need to install Docdil's Drag and Drop extension to move widgets.

### Add and remove widgets

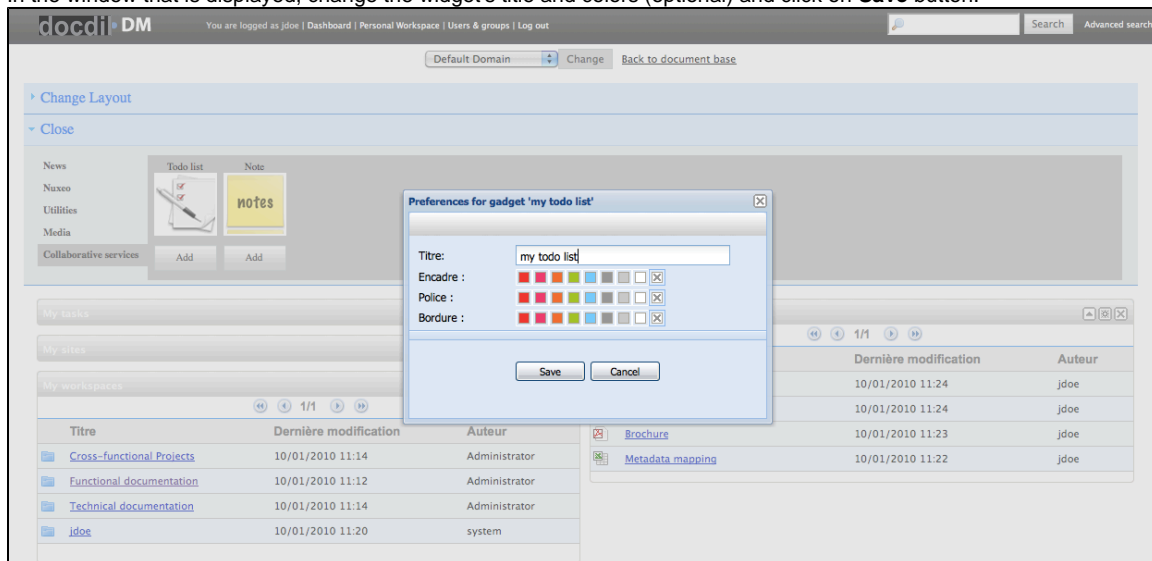
You can choose the widgets that are displayed on your dashboard.

### Add widgets

Depending on the version of Docdil DM you are using, the steps to add a widget on your dashboard are not exactly the same.

#### To add a widget on a Docdil DM 19.2.0 to 19.2.1:

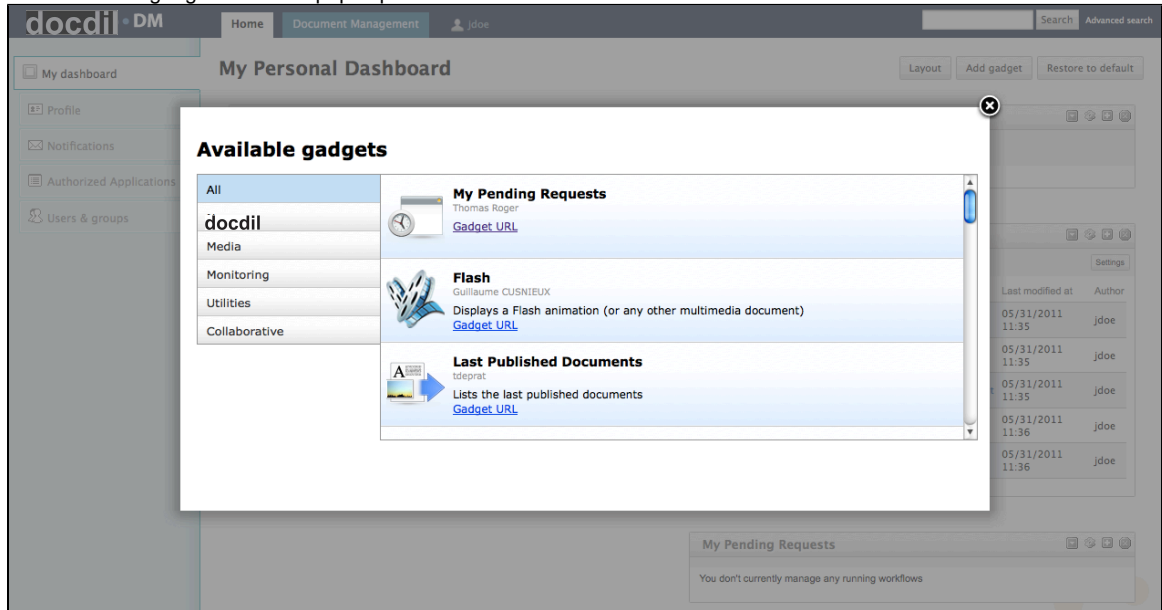
1. Click on **Add a widget**.
2. Click on the **Add** button of the widget you want to display on your dashboard.
3. In the window that is displayed, change the widget's title and colors (optional) and click on **Save** button.



4. Move the widget in the dashboard at the place you want it to be displayed.

### To add a widget on a Docdil DM 19.2.2:


1. Click on the **Add gadget** button.  
The "Available gadgets" window pops up.



2. Click on the gadget you want to display on your dashboard.  
The gadget is immediately added on the first available slot of your dashboard.
3. Move the widget in the dashboard at the place you want it to be displayed.

### Remove widgets

#### To remove a widget from your dashboard:


1. Click on the icon  of the widget you want to delete from your dashboard.
2. On the window that pops up, click **OK** to delete the widget.  
The widget is removed from your dashboard.

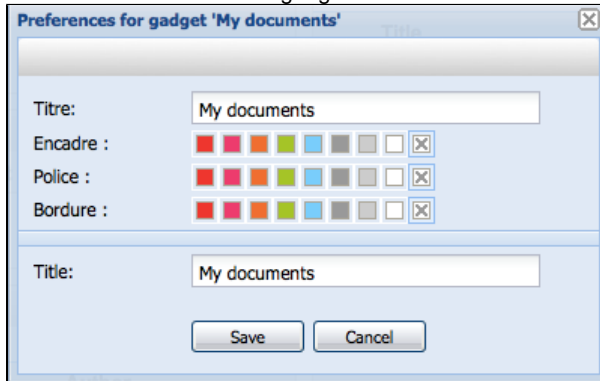
### Edit widgets

At any time, you can edit widgets. You can change their title or colors to change the look of your dashboard.

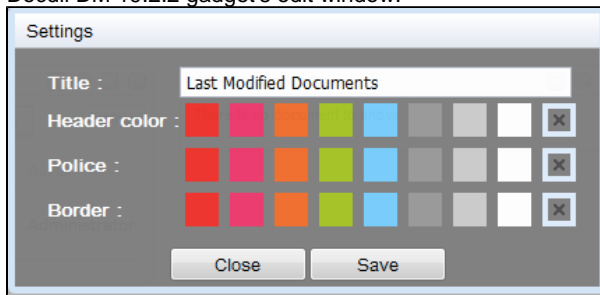


**To edit a widget:**

1. Click on the icon .
2. In the window displayed, change the widget's parameters.  
Docdil DM 19.2.0 to 19.2.1 gadget's edit window:



Docdil DM 19.2.2 gadget's edit window:



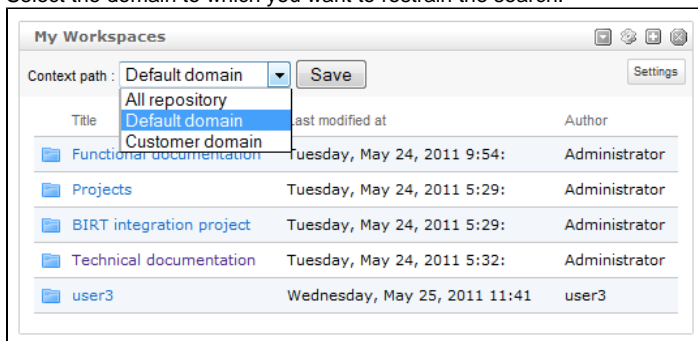
3. Click on **Save**.


On Docdil DM 19.2.2, you can also edit the settings of some Docdil's gadgets to indicate if the gadget should display documents from a specific domain of the application. By default, the search is done on the default domain. This setting is available on the following gadgets:

- My workspaces,
- Last modified documents,
- last published documents,
- my deleted documents.

**To change the domain setting:**

1. On the gadget, click on the **Settings** button displayed on the top right corner of the gadget.  
A "Content path" drop down list is displayed on the left of the "Setting" button.
2. Select the domain to which you want to restrain the search.



 Select "All repository" to search on all domains.

3. Click on the **Save** button.  
The content of your gadget is refreshed according to your selection.

**Search Docdil DM**

Docdil DM integrates a full text query engine, designed to recognize all the specific parameters the application provides.

Documents are indexed using their title, description, content (note field, attached files), and metadata.

Docdil DM provides several ways to search the content of the application:

- faceted search,
- simple search,
- advanced search.

It is also possible to [customize the search results presentation](#).

In this section, we will go through all the search features of Docdil DM:

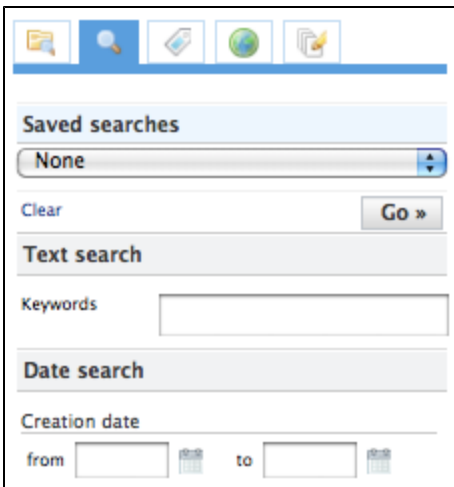
- [Faceted search](#)
  - [Save your faceted searches](#)
    - [Save a search](#)
    - [Share a saved search](#)
- [Simple search](#)
- [Advanced search](#)
- [Search results export](#)
- [Search results customization](#)
  - [Adding new search results columns](#)
  - [Removing search result columns](#)
  - [Changing search result sorting](#)

## Faceted search

Faceted search is an easy way to browse the content of your application, by creating filters on the content of the application. You can filter content using:

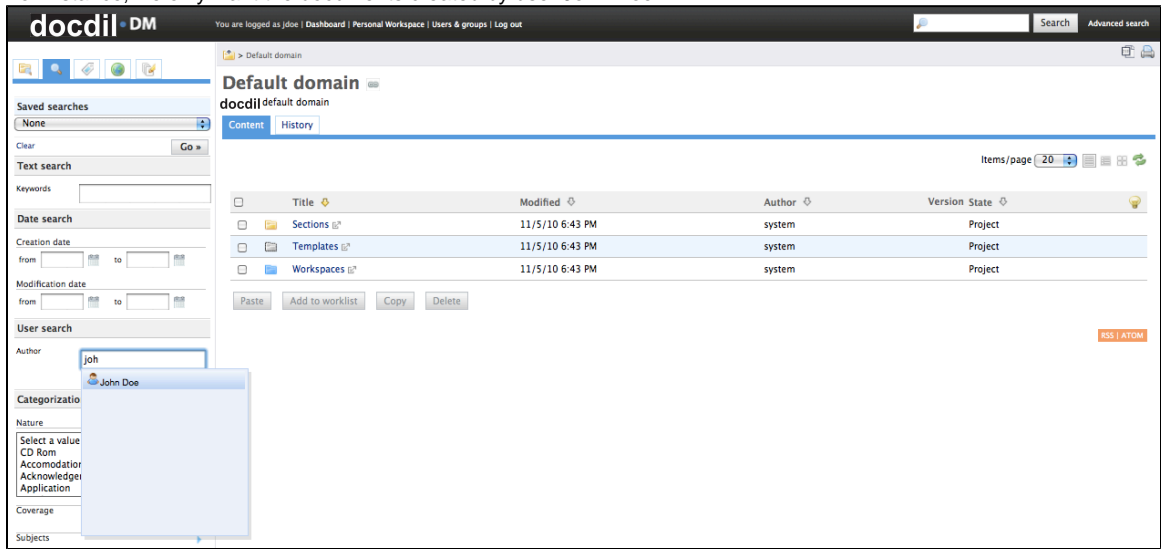
- keywords (full text search based on stemming, see [the simple search section](#) for more details on full text search)
- dates (creation and last modification dates)
- author
- documents categorization (nature, coverage, subjects of documents)
- location of the documents in the folders

Faceted search is available in the  tab of the left hand side of the page.

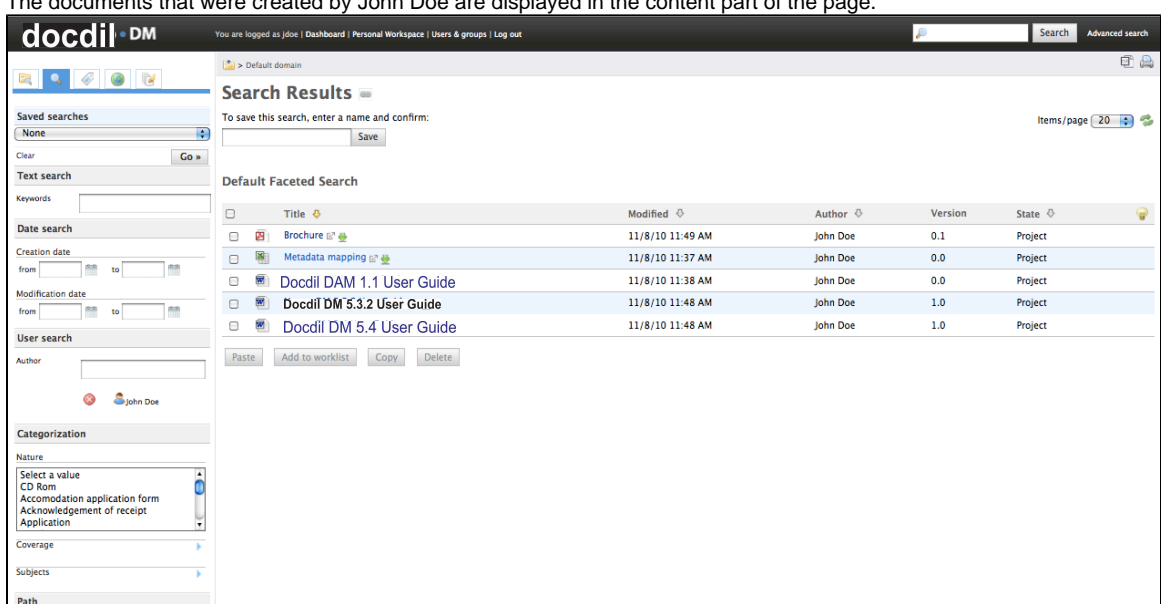


**To browse the content of the application using faceted search:**

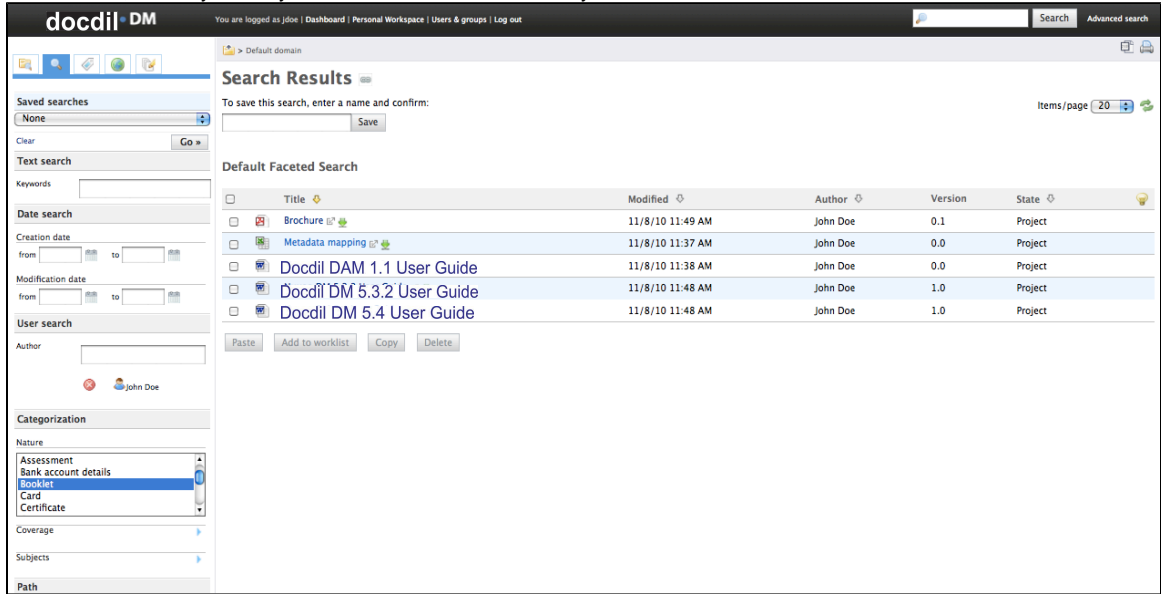
1. In the Faceted Search tab, fill in the form with the properties of the documents you want to browse. For instance, we only want the documents created by user John Doe.



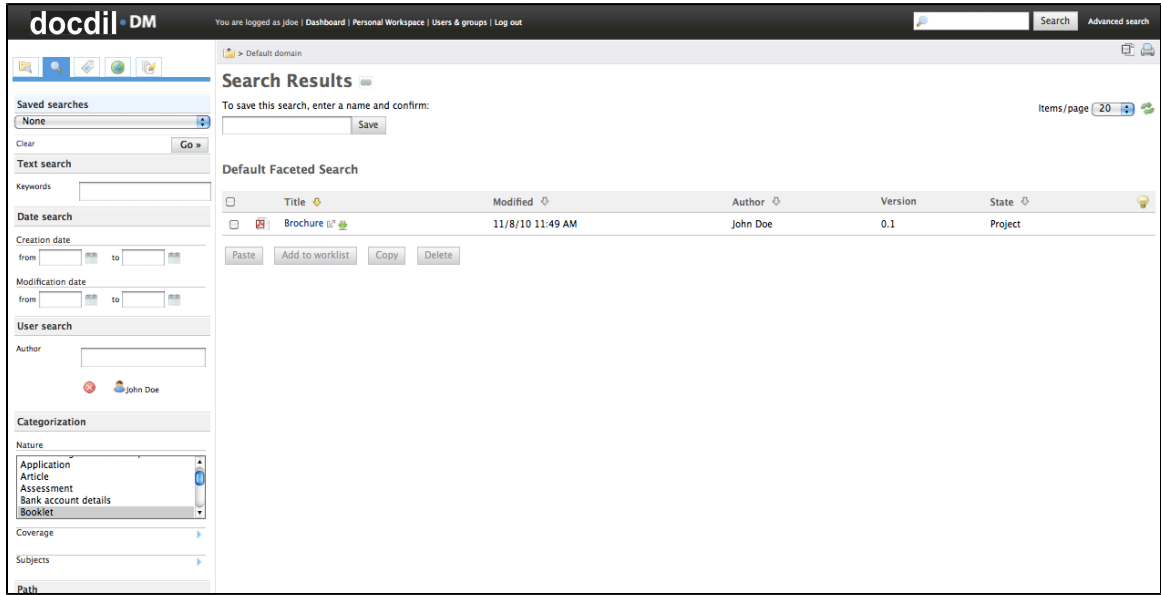
2. Click on the Go button. The documents that were created by John Doe are displayed in the content part of the page.



- If needed, edit your filter criteria in the faceted search form that is still available.  
For instance, let's say we only want the documents created by John Doe that are "booklets".




- Click on the **Go** button again.  
The list of documents that answer to the two criteria filled in is refreshed.



### Save your faceted searches

With faceted search comes the possibility to save your searches, so you can reuse them at anytime. You can also share these saved searched to make them available for other users.

 Only faceted searches can be saved.

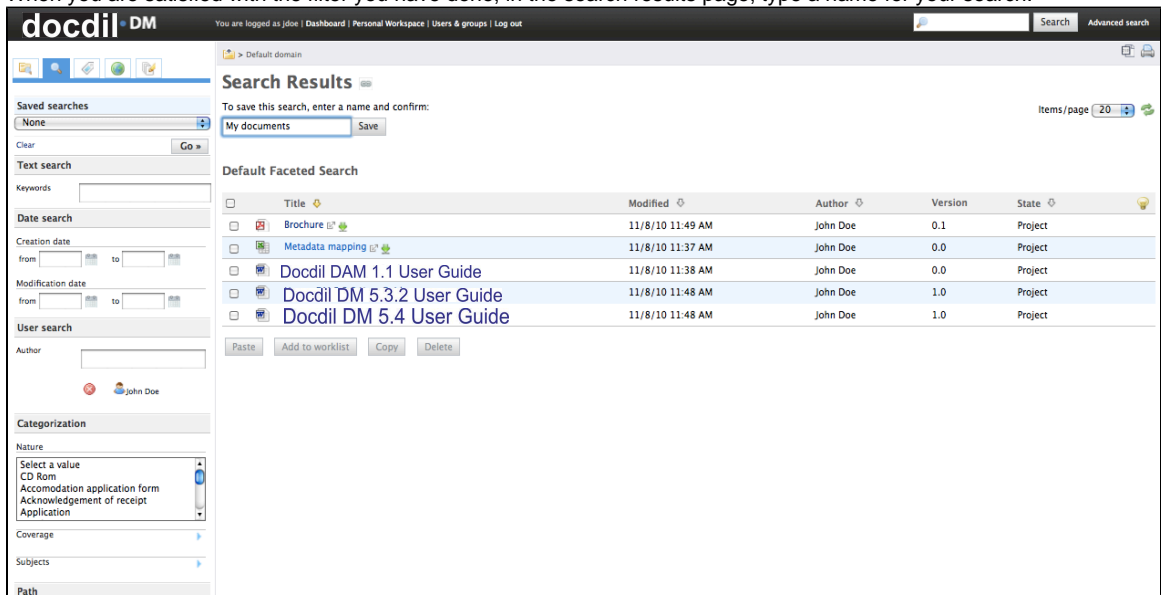
### Save a search

When you save a search, you save the criteria of the search. This means that the results displayed when you reuse the search may be different from the results at the time you saved the search, as the content of the application may (and probably will) have changed.

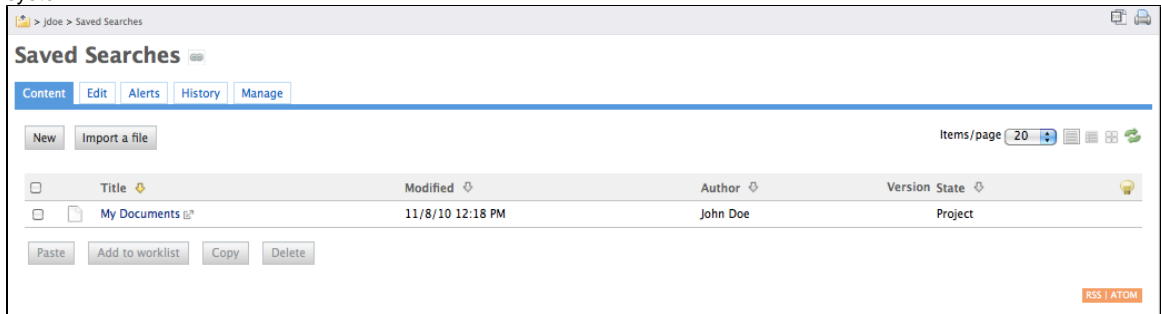
You can save as many searches you need. Saved searches are available in the faceted search tab, in the "Saved searches" drop down list. To load a search, just click on it in the list. It is automatically executed.

**To save a search:**

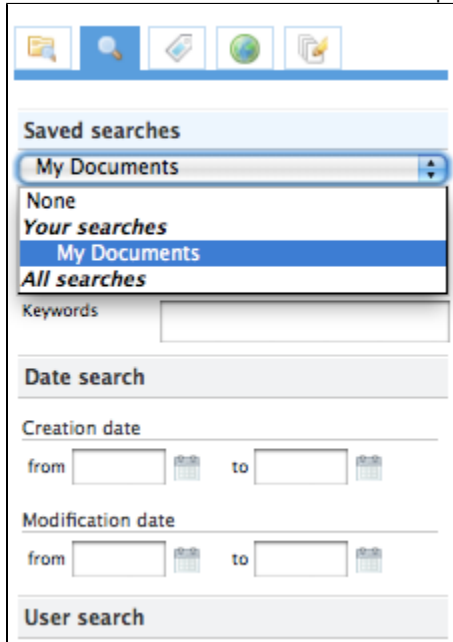
1. Start a search using the faceted search form.
2. When you are satisfied with the filter you have done, in the search results page, type a name for your search.



3. Click on the **Save** button.  
The search is saved. It is stored in your personal workspace, in a "Saved searches" that is automatically created by the system.



It is now available in the **Saved searches** drop down list, in the "Your searches" part.



### Share a saved search

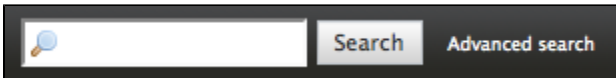
Saved searches are stored in your personal workspace, in a Saved Searches folder that is created automatically by the system the first time you save a search. This folder is a regular folder, in which you can perform the same actions as in a folder created manually. This enables you to organize your saved searched the way you want, and to share them.

#### To share a search:

1. Create a folder in the "Saved searches" folder of your personal workspace.
2. Move the saved search you want to share in this new folder, using the clipboard or drag and drop.
3. Give the users you want to share the search with [access to the folder](#). They just need read right to use the search.

### Simple search

Simple search can be accessed from any site page. At any time, you can search a document by typing keywords in the search box located at the upper right corner of the page and clicking the **Search** button.



Search results are displayed in a table. Click on the document's name to open it.

Search results :

Export to Excel (CSV)

<input type="checkbox"/>	Title	Creation date	Modification date	Description	Contributors
<input type="checkbox"/>	Functional documentation	10/1/10	10/1/10		Administrator
<input type="checkbox"/>	Technical documentation	10/1/10	10/1/10		Administrator
<input type="checkbox"/>	Cross-functional Projects	10/1/10	10/1/10		Administrator
<input type="checkbox"/>	Metadata mapping	10/1/10	10/1/10		jdoe
<input type="checkbox"/>	Brochure	10/1/10	10/1/10		jdoe
<input type="checkbox"/>	Docdil DAM 1.1 User Guide	10/1/10	10/1/10	<b>docdil</b> Digital Asset Management (DAM) user guide	jdoe
<input type="checkbox"/>	Docdil DM 5.3.2 User Guide	10/1/10	10/1/10	User guide of version 5.3.2 of <b>docdil</b> Document Management	jdoe

Paste Add to wishlist Copy Delete

The simple search is actually full text search. Full text search uses stemming. The Stemming search option will return the assets containing words that have the same stem as the word you entered into the "Keywords" field.

If you enter the word "Reading", you will find the assets containing in their text metadata "Read", "reads" etc.

This is not the same thing as a search with a wildcard like "\*".

The application's search engine uses boolean operators, to enable you to associate keywords. The Boolean operators used by the search engine are:

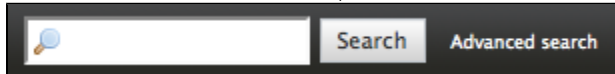
- **+**: the word after the + symbol must be in the found documents.  
Example: you are looking for documents that must contain "Docdil" and may contain "release". Type release +Docdil.
- **-**: The keyword after this symbol must not be in the found documents.  
Example: you are looking all the documents referring to the Docdil but not about meetings. Type Docdil -meeting.

### Advanced search

Advanced search enables you to search a document using more precise parameters. You can for instance select metadata of the searched document or the date of specific events such as publication, creation.

#### To search documents using detailed criteria:

1. Click on the **Advanced search** link, located next to the search box.



2. Type your criteria in the **Search criteria** form.
3. Possibly, [change the search results columns](#).
4. Click on the **Search** button.

Search results are displayed in a table. Click on the document's name to open it.

From Docdil DM 19.2.2, you can edit advanced search results directly from the search results page, using a filter displayed on top of the search results.

1. Click on the **Filter** link displayed on top of search results to unfold it. The advanced search form is displayed, filled in with your criteria.

Advanced search

Items/page 20

Filter Clear filter

<input type="checkbox"/>	Title	Modified	Last contributor	Author	Version	State
<input type="checkbox"/>	Docdil DM 5.4 User Guide	5/31/11 12:14 PM	John Doe	Solen Gutter	0.0	Project
<input type="checkbox"/>	Docdil DM 5.4.1 User Guide	5/31/11 12:13 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DAM 1.1 User Guide	5/31/11 12:14 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DAM 1.2 User Guide	5/31/11 12:14 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DAM 1.3 User Guide	5/31/11 12:10 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DM 5.4 User Guide	5/31/11 12:11 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil BIRT Admin view mock-up	5/31/11 12:12 PM	John Doe	John Doe	0.0	Project

Paste Add to wishlist Copy Delete

2. Edit your criteria and click on the **Filter** button to run the search with your new criteria.

Advanced search

Items/page 20

Filter Clear filter

Required words

Title

Description

Nature 

- Accommodation application form
- Acknowledgement of receipt
- Application
- Article

Search results are updated below the filter form.

Path

Language

Search also for deleted documents?

Filter Clear

<input type="checkbox"/>	Title	Modified	Last contributor	Author	Version	State
<input type="checkbox"/>	Docdil DM 5.4.2 User Guide	5/31/11 12:14 PM	John Doe	Solen Gutter	0.0	Project
<input type="checkbox"/>	Docdil DM 5.4.1 User Guide	5/31/11 12:13 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DM 5.4.0 User Guide	5/31/11 12:11 PM	John Doe	John Doe	0.0	Project

Paste Add to wishlist Copy Delete

Click on the **Clear filter** link on the left of the filter to empty the filter form and search for all documents.

## Search results export

From Docdil DM 19.2.2, you can export the results of your search as a CSV or PDF document. This enables you to save the search results to consult them later.

When you export search results, the exported document contains the same informations as the search results table. The default informations are the document's title, and its creation and modification dates.

To export search results, click on the one of the icons located on top of the document list, in the right corner:

- for CSV export, click
- for PDF export, click

## Search results customization

You can choose which informations are displayed on the results page. The default informations are the document's title, its creation date and its modification date. You can add or remove fields from search results display.


All users can customize search results columns.

### Adding new search results columns

#### To add a new search results column:

1. Click on the **Advanced search** link in the top rights corner of the page.  
The **Search results columns** form is displayed below the **Search criteria** form.


The screenshot shows a web interface for customizing search results. It has three main sections: 'Search result columns' (empty), 'Available columns' (a list of fields), and 'Selected columns' (a list of fields). Between these lists are four arrows: a left arrow, a right arrow, a double right arrow, and a double left arrow. To the right of the 'Selected columns' list are four vertical arrows: up, down, up, and down. At the bottom, there is an 'Order by' field with a green 'Add' button. Below the form are three buttons: 'Search', 'Clear', and 'Reset column selection'.

2. Select the column you want to add and click on the  arrow.  
The new field is added in the selected columns.

This screenshot is identical to the previous one, but the 'Description' column has been moved from the 'Available columns' list to the 'Selected columns' list. The 'Order by' field remains 'Add'.

3. Use the up and down arrows to reorder the columns.

### Removing search result columns

To remove a column, select the column to be removed and click on the  arrow.

### Changing search result sorting

You can sort the results on any of the search results column. You can also change the order direction.

#### To change the sort criteria of search results:

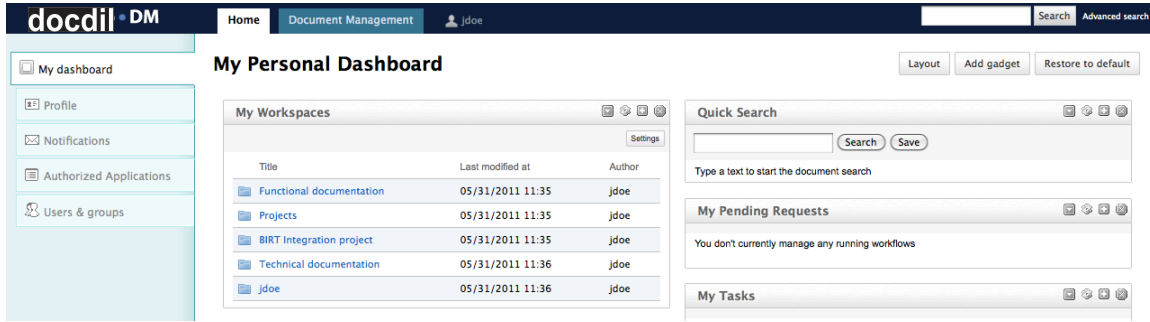
1. On the **Search results columns** form, in the **Order by** field, select the column you want to use to sort the search results.
2. In the **Order direction** field, select if you want to order search results in an increasing or decreasing order.

## User home

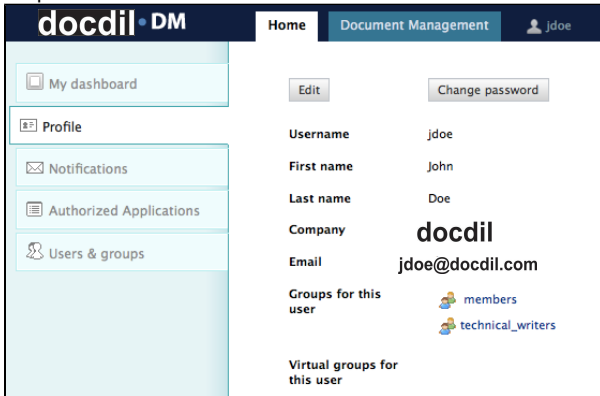
From version 19.2.2 of Docdil DM, users have a Home tab, that offers user-centric tabs. From this home, the user can access to:

- [his dashboard](#)

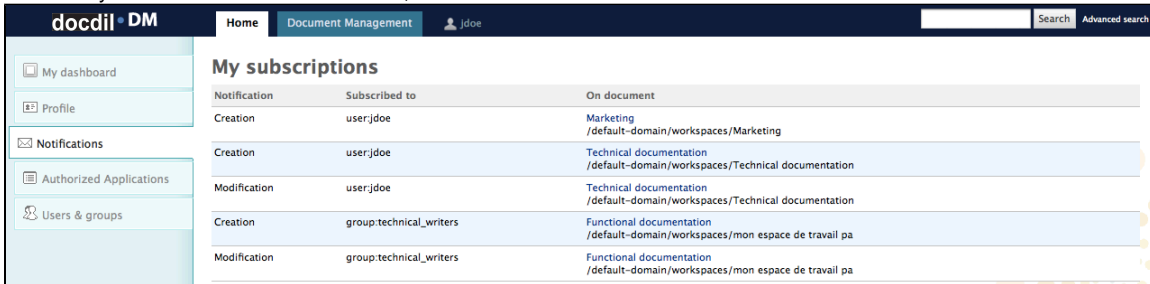




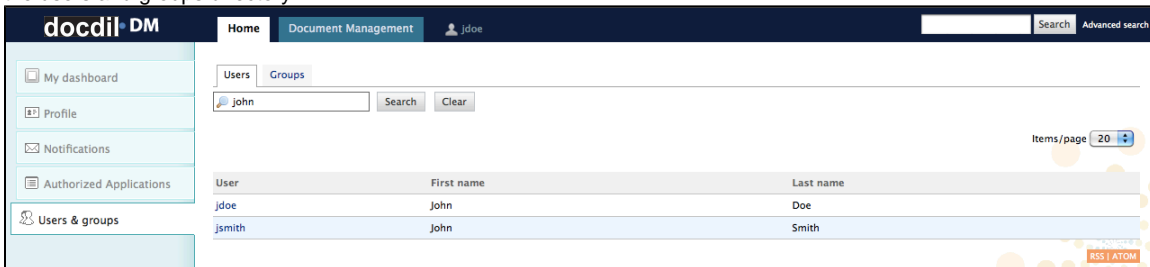
- his profile



- a summary of the alerts he's subscribed to,



- the list of external applications that can access Docdil DM's data, using Docdil DM gadgets for instance,
- the users and groups directory



## Using Docdil gadgets from other applications

On Docdil DM 19.2.2, it is possible to use Docdil DM gadgets in other applications, such as iGoogle.

This takes 2 steps, to make this work:

1. your administrator must authorize the external application to access Docdil DM,
2. you can add the Docdil gadget on the external application.

In this page, we will take the example of iGoogle, which is a pretty easy example.

### Authorize an external application to access Docdil DM

Before users can use Docdil DM gadgets in another application, the administrator must authorize this application to access Docdil DM content.

**To authorize external application to access Docdil DM content:**

1. In the Admin Center tab, click on the **OpenSocial / OAuth** tab.
2. Click on the **Consumer** tab.
3. Click on the **Add** link.  
The form to add a new consumer is displayed.
4. Fill in the form with the parameters below.
5. Click on the **Create** button.

**Google consumer parameters**

Field	Parameter
Consumer Key	www.google.com
Consumer Secret (HMAC Signature)	Leave empty
Consumer Public Key (RSA Signature)	

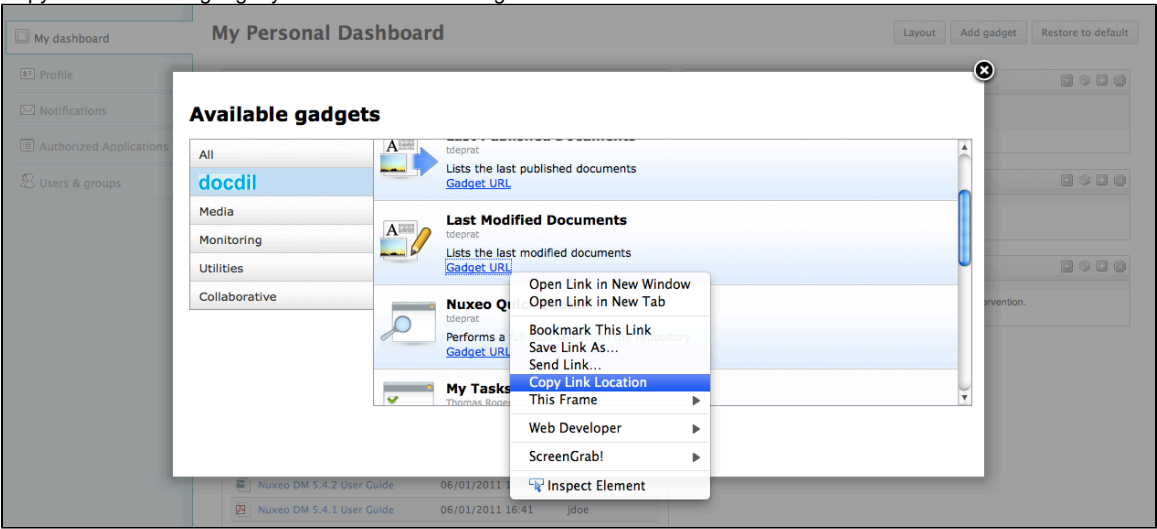
```
-----BEGIN CERTIFICATE-----  
MIIDBCCAm2gAwIBAgIJAK8dGINfkS  
THMA0GCSqGSib3DQEBBQUAMGAcCzAJ  
BgNV  
BAYTA1VMTQswCQYDVQQIEwJDQTEWMB  
QGA1UEBxMNTW91bnRhaW4gVm1ldzET  
MBEG  
A1UEChMKR29vZ2x1IEl1YzEXMBUGA1  
UEAxM0d3d3Lmdvb2dsZS5jb20wHhcN  
MDgx  
MDA4MDEwODMyWhcNMDkxMDA4MDEwOD  
MyWjBgMQswCQYDVQQGEwJVUzELMAkG  
A1UE  
CBMCQ0ExFjAUBgNVBAcTDU1vdW50YW  
luIFZpZXcxZzARBgNVBAoTCkdvb2ds  
ZSBJ  
bmMxZzAVBgNVBAMTDnd3dy5nb29nbG  
UuY29tMIGfMA0GCSqGSib3DQEBAQUA  
A4GN  
ADCBiQKBggQDUV7ukIfIixbokHONGM  
W9+ed0E9X4m99I8upPQp3iAtqIvWs7  
XCbA  
bGqzQH1qX9Y00hrQ5RRQj8OI3tRiQs  
/KfzGWodvLpIk5oXpdT58tg4F1Yh5f  
bhIo  
VoVn4GvtSjKmJFsoM8NRtEJHL1aWd+  
+dXzkQjEsNcBXwQvfDb0YnbQIDAQAB  
o4HF  
MIHCMB0GA1UdDgQWBBSm/hlpNY91bN  
fw08ac9riYzs3cxzCBkgYDVR0jBIGK  
MIGH  
gBSm/hlpNY91bNfw08ac9riYzs3cx6  
FkpGIwYDELMAkGA1UEBhMCVVMxGzAJ  
BgNV  
BAGTAkNBMRywFAYDVQQHEw1Nb3VudG  
Fpb1BwWV3MRMwEQYDVQQKEwphb29n  
bGUg  
SW5jMRcwFQYDVQQDEw53d3cuZ29vZ2  
xlLmNvbYIJAK8dGINfkSTHMAwGA1Ud  
EwQF  
MAMBAf8wDQYJKoZIhvcNAQEFBQADgY  
EAYpHTTr3vQNsHHHUm4MkYcDB20a5Kv  
cFoX  
gCcYtmdyd8rh/FKeZm2me7eQCXgBfJ  
qQ4dvVLJ4LgIQiU3R5ZDe0WbW7rJ3M  
9ADQ  
FyQoRJP8OIMYW3BoMi0Z4E730KSLRh  
6kflq4rK6vw7lkH9oynaHHWZSJLDAP  
17cP  
j+6znWkN9/g=  
-----END CERTIFICATE-----
```

Description	Leave empty
Allow 2 legged auth	Leave default value.
Callback URL	<a href="http://oauth.gmodules.com/gadgets/oauthcallback">http://oauth.gmodules.com/gadgets/oauthcallback</a>
Allow OAuth verifier check bypass	Check "Yes".
Enabled	Check "Yes".

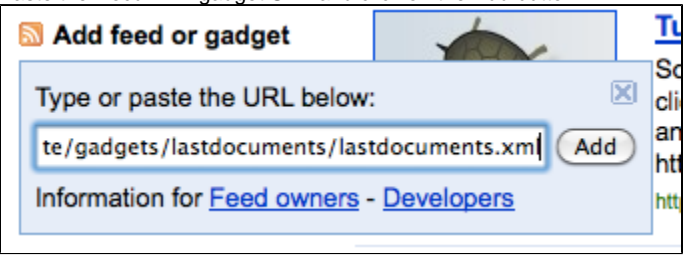
### Add the Docdil gadget in the external application

**Add a Docdil DM gadget in an external application:**

- In Docdil DM, go on your dashboard, available in the Home tab.
- Click on the **Add gadget** button.
- Copy the URL of the gadget you want to use in iGoogle.



- In the external application, add a new gadget that has the Docdil DM gadget URL. On iGoogle:
  - On iGoogle home, click on **Add gadgets**.
  - On the gadget selection page, click on **Add feed or gadget**.
  - Paste the Docdil DM gadget URL and click on the Add button.



The Docdil DM gadget is now available from your iGoogle page.  
iGoogle is available in the "Authorized Applications" tab of your home, so you can set how long iGoogle can access Docdil DM content.

## Working in workspaces

Workspaces are spaces dedicated to collaborative work. It is the place where you will be able to create, share and edit documents.

You can also use collaborative services like forums, websites or blogs to communicate and share information with the other users.

### Working with workspaces

There are two types of workspaces:

- collaborative workspaces* are workspaces meant for collaborative work, that is to say that the workspace's content is meant to be shared and modified by several users. Collaborative workspaces are workspaces created in the root space called Workspaces and shared between users. Once documents are ready for distribution, they must be published in a section.
- personal workspaces* can only be accessed by their owner, by default. You can of course share the access to your personal workspace

with other users. Personal workspaces are accessible in the header of the application.



Content creation and edition, as well as management, works the same way in personal workspaces as in collaborative workspaces.

By default, no workspace is available at workspaces root. Thus, you can create the structure you need for your project, edit it if needed. You can also [set the appropriate access right](#) for users to be able to collaborate in the workspaces.

Workspaces management also includes setting [alerts](#) for users to be informed when content is created or edited in workspaces and handling content deletion.

## Creating a workspace

Workspaces are created in the Workspaces rootspace, either at the root of Workspaces or in subworkspaces. By default, no workspace is available in Docdil DM so that you can create the structure needed for your project. You can create as many workspaces and subworkspaces as you need.

Workspaces can be created from scratch or from a template.

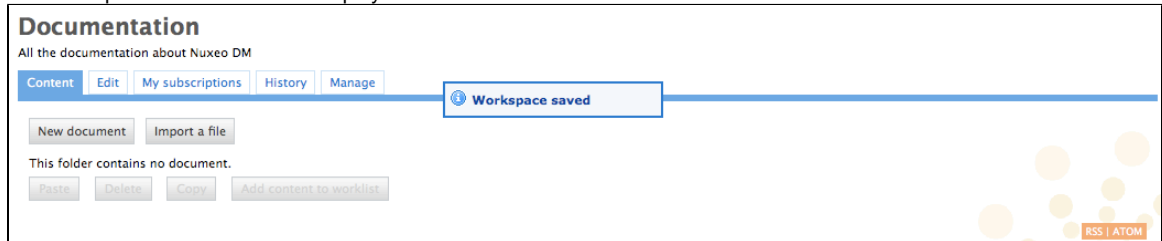
### Create a workspace from scratch

To create a new workspace, you need to have at least 'Write' rights in the parent folder.

#### To create a workspace:

1. Click on the **New Document** button (**New Workspace** if you are the root of workspaces).
2. On the Available document types window, click on **Workspace**.
3. Give the workspace a title and possibly a description.
4. Click on **Create** button.

The workspace's **Content** tab is displayed.



### Create a workspace from a template

Templates are predefined workspaces that you can use to make building your workspace structure easier.

When you create a workspace from a template, the newly created workspace automatically have the same content and description as its template. Access rights however are not inherited from the template but from the parent workspace.

#### To create a workspace from a template:

1. Click on the **New Document** button (**New Workspace** if you are the root of workspaces).
2. On the Available document types window, click on **Workspace**.
3. Give the workspace a title, possibly a description and select the template to create the workspace from in the drop down list.
4. Click on **Create** button.

The workspace's **Content** tab is displayed.

## Editing a workspace

To edit a workspace, you need to have Manage right on the workspace.

When you edit a workspace, you can edit its properties (title and description) and its metadata.

#### To edit a workspace:

1. Click on the **Edit** tab of the workspace.
2. Edit the edition form's fields.
3. Optionally type a comment to keep track of why you edited the workspace.
4. Click on the **Save** button.

Modifications are saved and the fact that you edited the workspace is tracked in **History** tab.

## Deleting a workspace

Only users with writing or management rights in the parent workspace can delete a workspace.

When you delete a workspace, you also delete its content. This action moves the workspace into the parent's trash, from which users with management rights can [revert deletion](#) or [delete it permanently](#).

### To delete a workspace:

1. In the **Content** tab of the parent workspace, check the box corresponding to the workspace to delete.
  2. Click on the **Delete** button.
  3. In the window that pops up, click on the **OK** button.
- The parent workspace's **Content** tab is displayed: the deleted workspace is not displayed anymore.

## Managing a workspace

Users with management rights can parameter the workspace.

All management actions are available in the **Management** tab of the workspace. This is the place where you can:

- [set access rights](#) on the workspace to define who can read the content, edit it or delegate management of the workspace
- set [alerts](#) for other users so they get automatically informed of the content evolution
- [manage deleted documents](#) in the workspace **Trash**,
- change the look of the workspace by [choosing a preset theme](#),
- define the sections in which users will be able to publish from the document (called [publication targets](#)).

### Manage deleted documents

When they are deleted by users with writing rights, documents are moved into the **Trash** tab of the parent folder (domain, workspace, folder, etc). They are not erased from the application. Users with management rights can still restore them or delete them permanently.

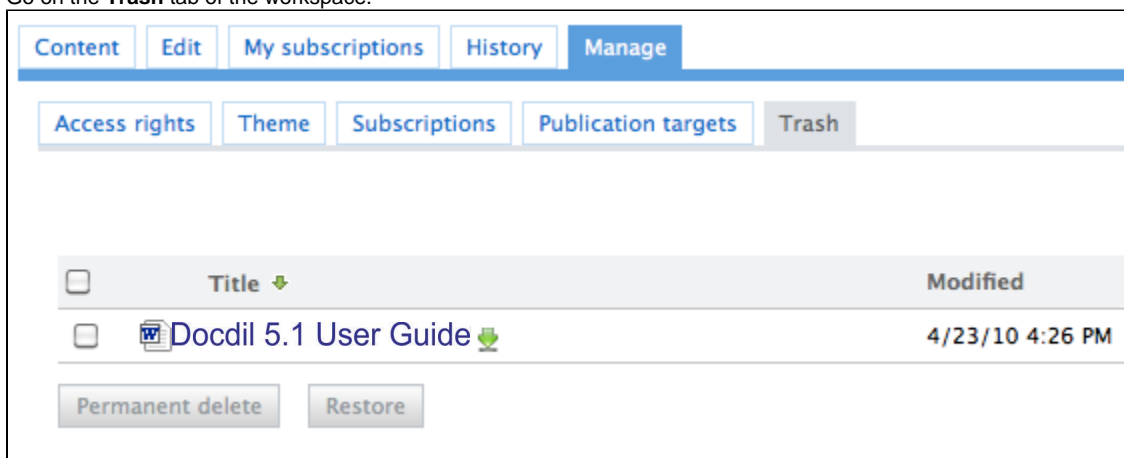
#### Restore documents

Only users with management rights can restore documents.

When they are deleted by users with writing rights, documents are moved into the **Trash** tab of workspaces or folders. They are not erased from the application and can still be restored, i.e. moved back into the **Content** tab of the workspace.

### To restore a document:

1. Go on the **Trash** tab of the workspace.



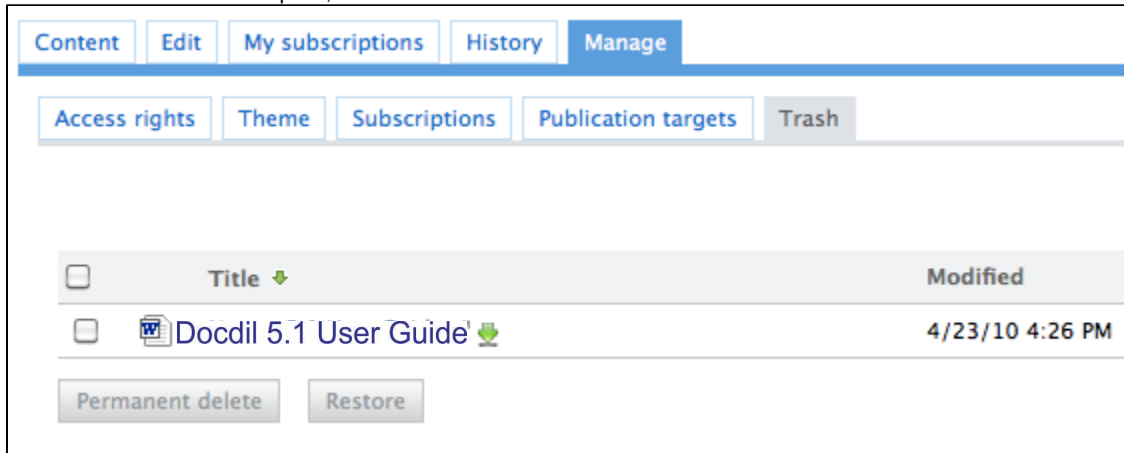
2. Check the box in front of the document's name.
  3. Click on the **Restore** button.
  4. On the window that pops up, click on the **OK** button.
- The document is moved back into the **Content** tab of the workspace.  
It takes the 'project' life cycle state, even if its life cycle state before deletion was 'approved' or 'obsolete'.

#### Permanently delete documents

Only users with management rights can manage the trash of a space and delete documents permanently.

### To delete a document permanently:

1. In the **Trash** tab of the workspace, check the box in front of the document's name.



2. Click on the **Permanent delete** button.
3. On the window that pops up, click on the **OK** button.  
The document is permanently erased from the application. It cannot be restored.  
The [relations](#) from and to the deleted document are updated and are displayed as a URI relation: the deleted document is displayed as an external document, identified by its reference (URI).

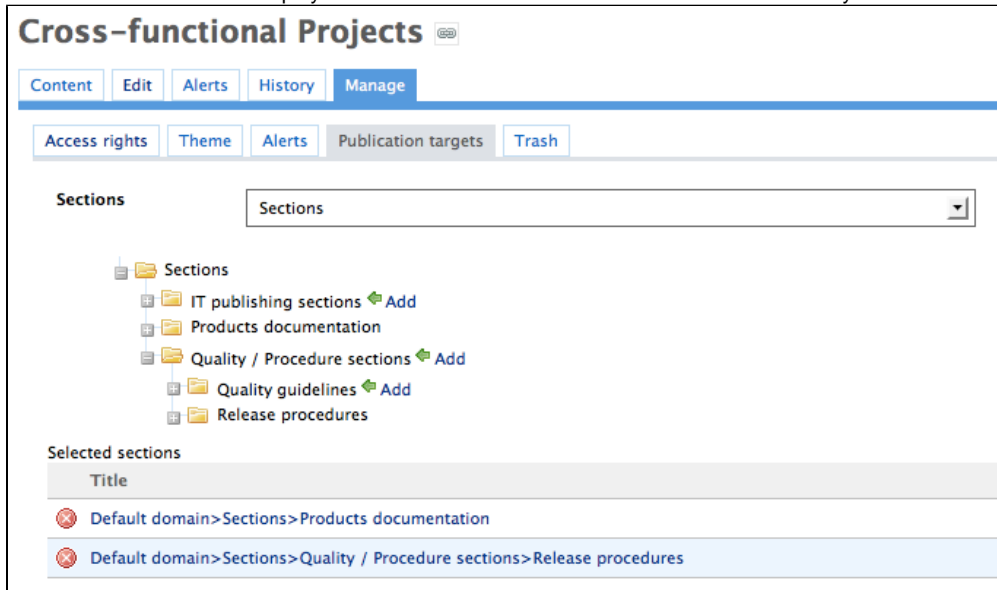
## Set publication targets

In order to guide users when they publish documents and make sure documents are published in the correct sections, you can define publication targets for the workspace's documents. Publishing targets are sections in which the documents from the workspace will be publishable. Users will then be able to publish documents only in the sections you have defined.

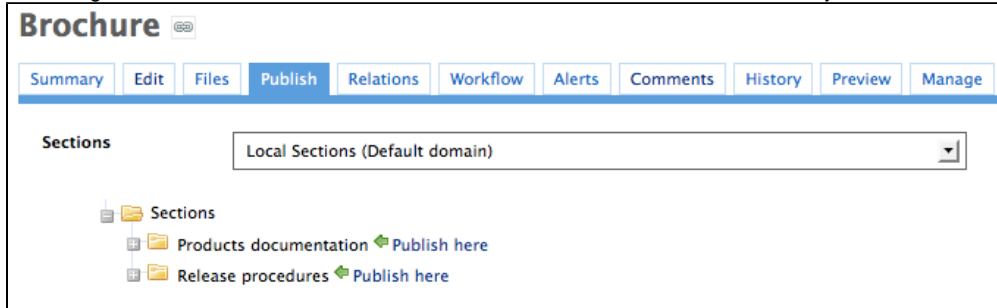
By default, workspaces don't have any targets defined.

### To define the publication targets of a workspace:

1. Click on the **Manage** tab of the workspace.  
The **Access Rights** tab is displayed by default.
2. Click on the **Publication targets** tab.  
If no section has been defined yet, users can submit documents to publishing in any section (providing they have the rights to publish).
3. Unfold the sections tree and click on the **Add** link of the sections to which you want to restrict publishing from this workspace.  
The selected sections are displayed in a table below the tree. No **Add** link is available anymore for these sections.



When they click on the **Publish** tab of documents to publish a document, users are still displayed all the sections they have "Read" right on, but the **Publish here** link is now available for the selected sections only.



4. Click on the icon to remove a section from the workspace's targets.

### Apply preset look to a space

Administrators can easily apply a preset theme to a workspace, template or section. You can apply a theme to spaces only. For instance, you can change the theme of sections, so that they look different from workspaces, but you cannot change the look of a document.

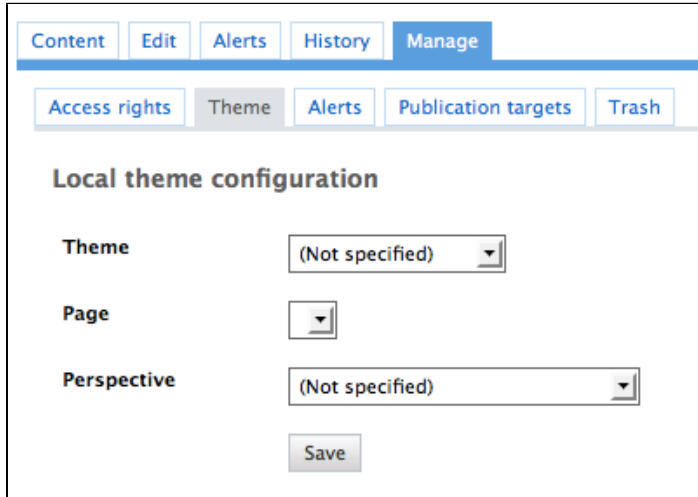
**i** The new space's theme is not applied to the sub-spaces, but it is applied to the documents it contains.

When you choose to apply a theme to a workspace, for instance, you can refine what is displayed on the page by applying a perspective on the theme. A perspective is a fragment visualization mask that determines that some parts of the page, like the clipboard and worklist, are not displayed to the user if specified conditions are met. The default application has only one perspective.

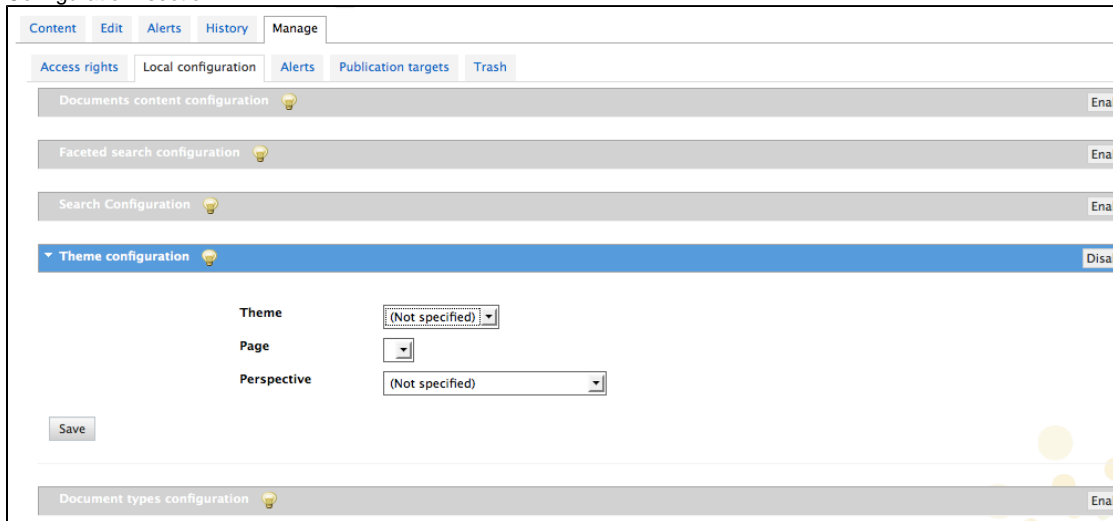


### To change the theme of a workspace:


1. Click on **Manage** tab of the space.
2. Depending on your version of Docdil DM, follow the corresponding step:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Theme sub-tab.



- On Docdil DM 19.2.2, click on the Local configuration tab and, if needed, click on the Enable link of the "Theme Configuration" section.



3. Select the theme, page and perspective you want to apply.

 The theme applied by default is the "galaxy" theme.

4. Click on the **Save** button.  
The page is displayed with the selected look.

## Change the presentation of document lists

Docdil 19.2.2 features a new "Local configuration" sub-tab of the "Manage" tab of spaces. From this tab, you can set preferences on what content can be created in the current space, how the lists of content should be presented, customized search features...

Docdil DM uses different presentations for the lists of documents: they can have different layouts, display specific informations on the documents, have a different default number of documents on a page, enable some features on the documents, etc. These predefined presentations of lists of documents are called "Content views".

Here are some examples of content views used in Docdil DM:

- Document content (used for workspaces and sections for instance):

New Import a file Items/page 20

Filter

<input type="checkbox"/>	Title	Modified	Last contributor	Author	Version	State
<input type="checkbox"/>	Docdil DAM 1.1 User Guide	5/31/11 12:14 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DAM 1.2 User Guide	5/31/11 12:14 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DAM 1.3 User Guide	5/31/11 12:10 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DM 5.4 User Guide	5/31/11 12:11 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DM 5.4.1 User Guide	5/31/11 12:13 PM	John Doe	John Doe	0.0	Project
<input type="checkbox"/>	Docdil DM 5.4.2 User Guide	5/31/11 12:14 PM	John Doe	Solen Gutter	0.0	Project

Paste Add to wishlist Copy Delete

• trash content view:

New Import a file Items/page 20

Filter

<input type="checkbox"/>	Title	Modified	Last contributor	Author	Version	State
<input type="checkbox"/>	DM User doc	5/31/11 12:31 PM	Solen Gutter	Solen Gutter	0.0	Deleted
<input type="checkbox"/>	Marketing documentation	5/31/11 12:30 PM	Solen Gutter	Solen Gutter		Deleted
<input type="checkbox"/>	Old documentation	5/31/11 12:30 PM	Administrator	Administrator		Deleted
<input type="checkbox"/>	Tech documentation	5/31/11 12:30 PM	Solen Gutter	Solen Gutter		Deleted
<input type="checkbox"/>	User documentation	5/31/11 12:30 PM	Solen Gutter	Solen Gutter		Deleted

Permanent delete Restore

• Last modified documents:

3/6

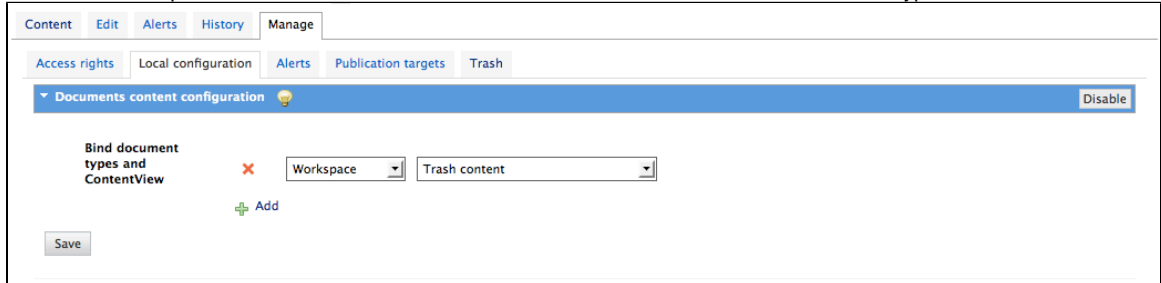
Title	Last modified at	Author
swan_lake.pdf	Wednesday, May 18, 2011 3:15:	jdoe
swan_lake.rtf	Wednesday, May 18, 2011 3:15:	jdoe
tchaikovsky_EN.pdf	Wednesday, May 18, 2011 3:15:	jdoe
petipa_EN.pdf	Wednesday, May 18, 2011 3:15:	jdoe
Guillem_EN.pdf	Wednesday, May 18, 2011 3:15:	jdoe

You can define what content view will be used for folderish documents (ie documents in which you can create other documents) in the current space. This is inherited in the folderish documents of the space from which you define these preferences.

You can leverage this feature when you customize Docdil DM and create new content views. Your content view will then be available in the drop down list and you can use locally for documents. You can read How to define a new view using Docdil Studio.

### Associate a document type and a content view:

1. Click on the **Manage** tab of the current space.
2. Click on the **Local configuration** sub-tab.
3. If needed, click on the **Enable** link of the "Documents content configuration".  
The document content configuration form is displayed.
4. Click on the **Add** link to define a new document type - content view association.
5. In the first drop down list, select the document type.
6. In the second drop down list, select which content view will be used for the selected document type.



7. Click on the **Save** button.  
The selected document type now has the presentation defined by the selected content view, in the current space and its sub-spaces.

### Remove a document type - Content view association:

1. Click on the **Manage** tab of the current space.
2. Click on the **Local configuration** sub-tab.  
The available local configurations are displayed.
3. In the Document content configuration, click on the icon **X** the document type - content view association you want to remove.
4. Click on the **Save** button.  
The document type has its default content view.

## Define the authorized document types

Docdil DM 19.2.2 features the local configuration, with the possibility to define set some document types preferences at the workspace or section level, from Docdil DM's interface. These preferences are inherited in the sub-spaces and all folderish documents (folders, ordered folders, websites, etc).

The document types configuration enables users to:


- define what document types can be created in the space,
- deny the possibility to create documents in the space,
- select the document type created by default in case of a import using drag & drop.

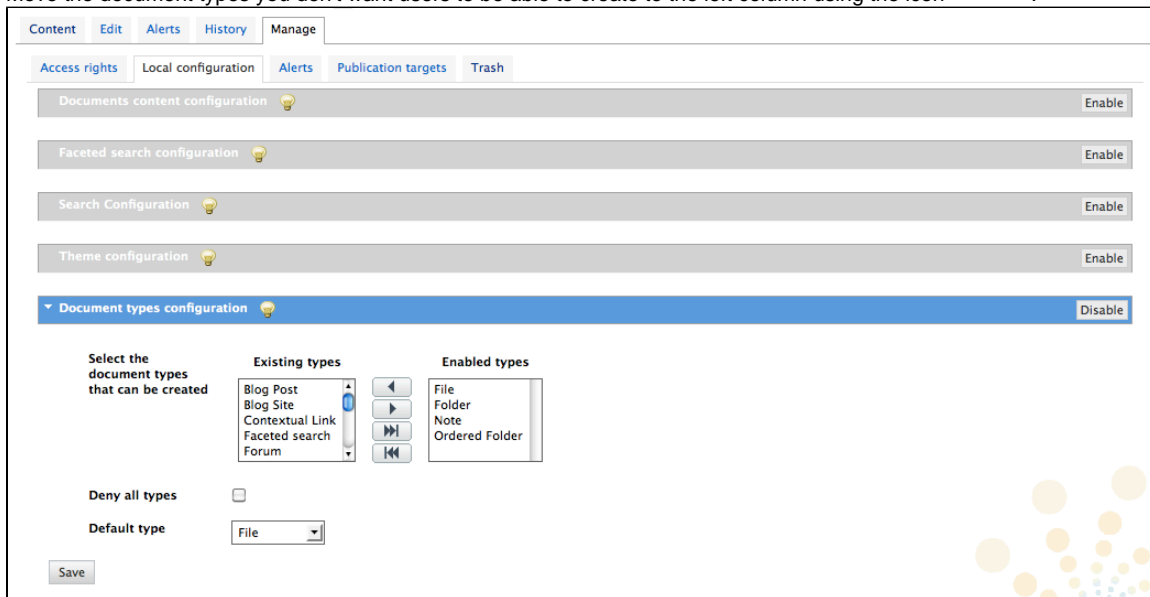
### **Define what document types can be created**

Users with Manage right in a space can define what document types can be created in the current space by restricting the list of allowed document types proposed by default.

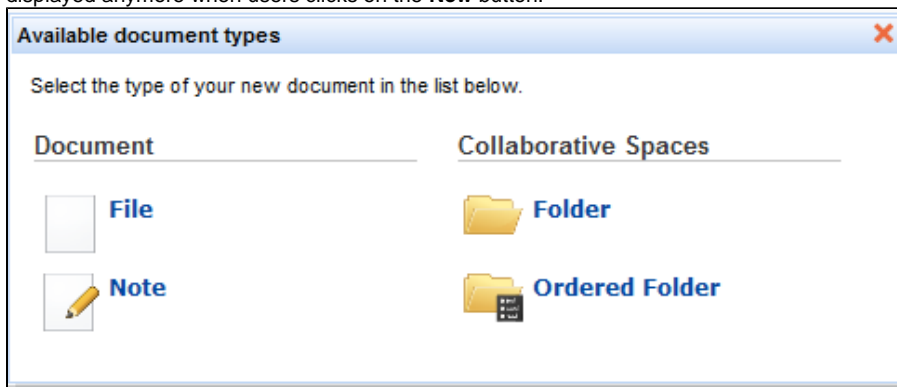
**To define what document types can be created in a space:**

1. On the current space, click on the **Manage** tab.
2. Click on the **Local configuration** sub-tab.  
The list of the available local configurations are displayed.
3. If needed, click on the **Enable** link of the "Document types configuration".  
The document types configuration form is displayed. By default, all types are allowed.

4. Move the document types you don't want users to be able to create to the left column using the icon 



5. Click on the **Save** button.  
The document types you removed from the default selection cannot be created in the current space anymore: they are not displayed anymore when users clicks on the **New** button.



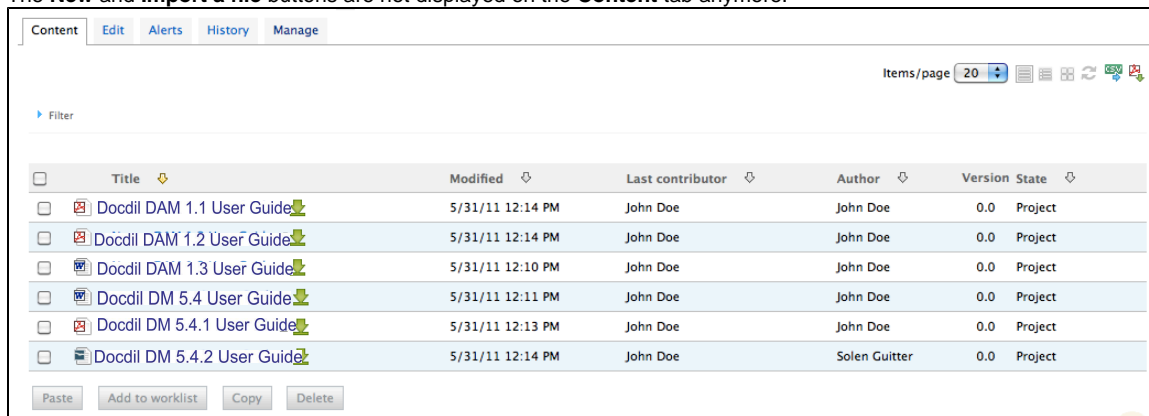
**Deny the possibility to create documents**

It is possible to deny the possibility to create documents without changing the access rights applied to the space. This allows to prevent the creation of new documents without forbidding the edition of existing documents.

### To prevent new document creation:

1. On the current space, click on the **Manage** tab.
2. Click on the **Local configuration** sub-tab.  
The list of the available local configurations are displayed.
3. If needed, click on the **Enable** link of the "Document types configuration".  
The document types configuration form is displayed. By default, all types are allowed.
4. Check the box **Deny all types**.
5. Click on the **Save** button.

The **New** and **Import a file** buttons are not displayed on the **Content** tab anymore.



### Select the default document type

Workspace managers can set the document type that is created when users import documents using the **import a file** button or drag & drop. In a workspace, the default document type is file.

### Define the default document type for import:

1. On the current space, click on the **Manage** tab.
2. Click on the **Local configuration** sub-tab.  
The list of the available local configurations are displayed.
3. If needed, click on the **Enable** link of the "Document types configuration".  
The document types configuration form is displayed. By default, all types are allowed.
4. Select the default document type in the drop down list.
5. Click on the **Save** button.  
The **New** and **Import a file** buttons are not displayed on the **Content** tab anymore.



You can leverage this feature when you customize Docdil DM and create new document types that extend the File document type. Your document type will then be available in the "Default type" drop down list and you can select it instead of the default File. You can read a tutorial showing how to create a new document type using Docdil Studio.

## Local search configurations

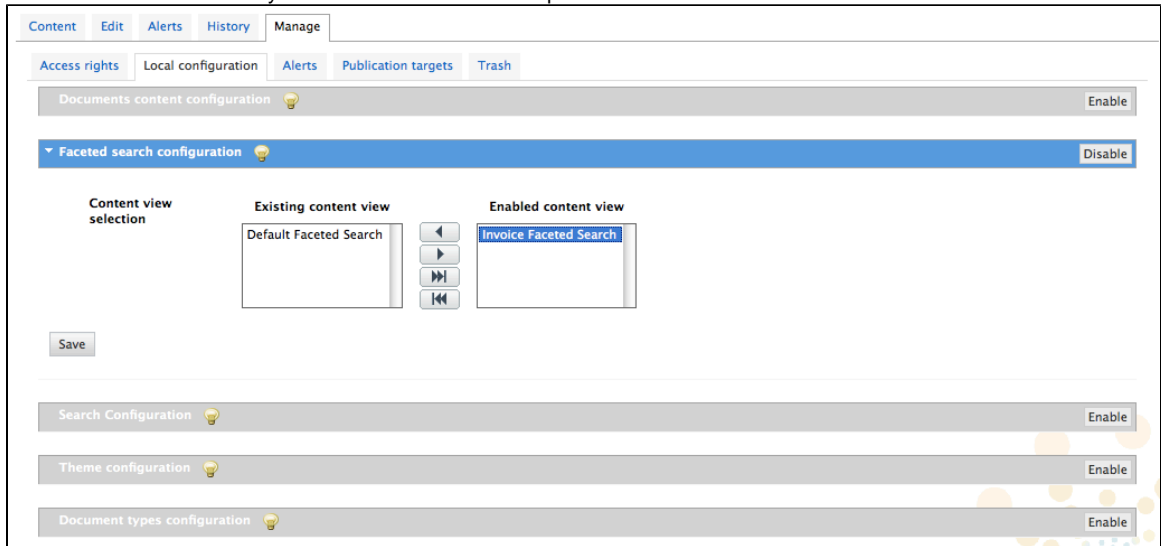
If customized faceted search and advanced search forms have been contributed, it is possible to define what **faceted search** or **advanced search** to display from a space. This enables users to have search forms adapted to the documents and processes used in the space.

### Change faceted search


It is possible to enable several faceted searches on a space. This allows users to have several forms and possibly predefined searches that they can edit.

### Enable contributed faceted searches:

1. Click on the **Manage** tab of the space.
2. Click on the **Local configuration** sub-tab.
3. If needed, click on the **Enable** link of the faceted search configuration.  
The default faceted search provided in Docdil DM and the list of contributed faceted searches is displayed.
4. Move the faceted searches you want to enable from the space to the "Enabled content view" list.



5. Click on the **Save** button.  
Users that have access to the space now have the selected faceted searches available in the Faceted search tab of the left pane.

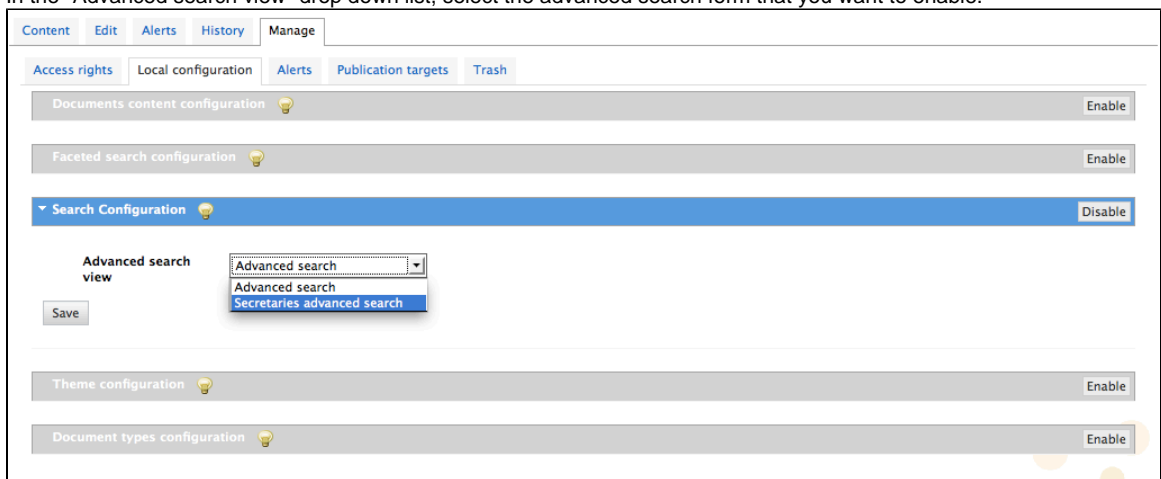
 To remove a faceted search, move it back to the "Existing content view" list on the left and click **Save**.

### Change advanced search form

You can have only one advanced search form enabled.

### Enable a contributed advanced search form:

1. Click on the **Manage** tab of the space.
2. Click on the **Local configuration** sub-tab.
3. If needed, click on the **Enable** link of the search configuration.  
The default advanced search form provided in Docdil DM is selected in the "Advanced search view" drop down list.
4. In the "Advanced search view" drop down list, select the advanced search form that you want to enable.



5. Click on the **Save** button.  
When users click on the **Advanced search** link from the current space and one of its sub-space, the selected advanced search form is displayed.

## Working with documents

Docdil DM is a collaborative document management application. That is to say that you can create, edit and share documents within the application.

Documents are sorted in two categories:

- collaborative services
- documents

Collaborative services are folderish documents that enable users to share information:

- [Workspaces](#)
- [Folders](#)
- [Picture book](#)
- [Mail folder](#)
- [Forum](#)
- [Websites and blogs](#)

Documents available in Docdil DM are:

- the **note**: a text typed in a rich editor integrated to Docdil DM;
- the **file**: an attached file;
- the **picture**: a picture file with specific features available;

The evolution of a document, each time contributors edit it, constitutes its life cycle. This life cycle is composed of the following states:

- *project*: the document has been created and it can be modified;
- *approved*: the document has been approved and is considered as valid. Modifying it makes it back to project life cycle state;
- *obsolete*: the document is not accurate anymore and, for instance, has been replaced by a new version;
- *deleted*: the document is moved into the workspace's or folder's trash.

To change the life cycle state of a document, you need to submit it to a [workflow](#).

### Create content

You need to have writing or management rights to create documents.

Documents can be created in workspaces, templates and folders only. There are several ways to create documents in Docdil DM. You can:

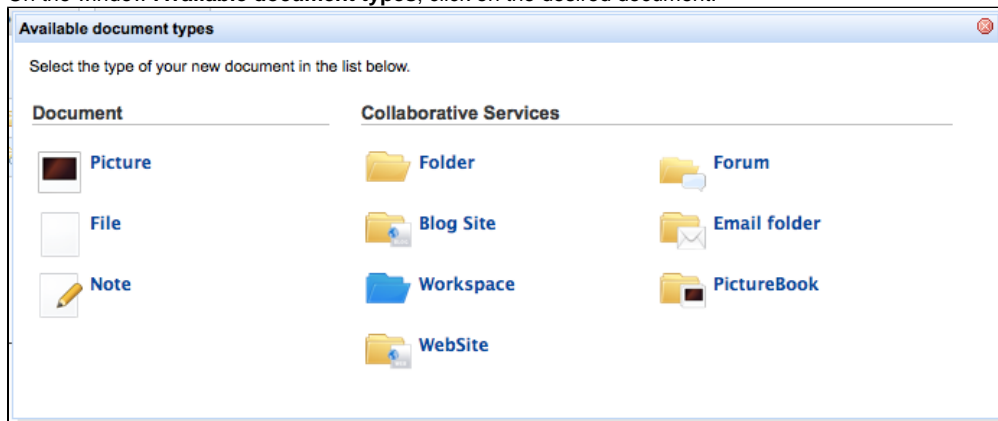
- create all content types from the "Content" tab of the workspace and filling the appropriate form (see below),
- use drag and drop from your desktop, to [import one or several documents](#),
- create documents directly from MS Office or OpenOffice, using Docdil LiveEdit extensions.

#### Create a document using New document button

Creating a document using the New document button enables you to select the type of document you want to create among all Docdil DM's document types.

To create a document using New document button:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.



3. Fill in the document's creation form.
4. Click on the **Create** button.

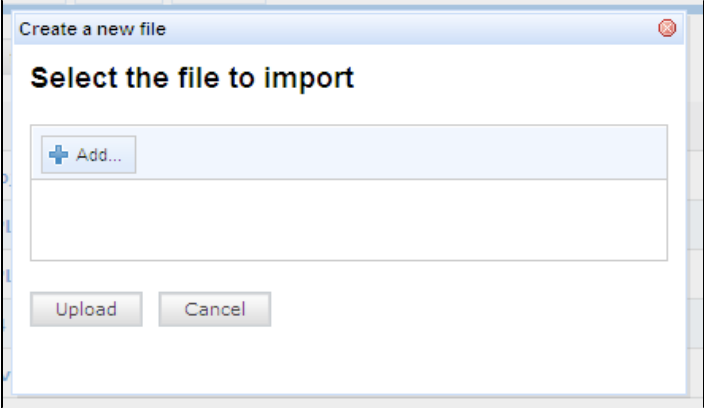
The **Summary** tab of the document is displayed.

### Create a document using Import a file button

You can use the **Import a file** button to create a document in a faster way. Using this button, you won't need to fill the creation form. Depending on the uploaded file type, the system will create a note, a file or a picture.

**To create a document using Import a file button:**

1. In the **Content** tab of the workspace, click on the **Import a file** button.
2. On the **Create a new file** window, click on the **Add** button to select the file to be uploaded.



3. Click on the **Upload** button.  
The **Summary** tab of the document is displayed. The document automatically takes the name of the uploaded file as its title. The document has no description. You need to [modify the document](#) to fill in this field.

## Edit content

Documents can be edited by users with writing rights in a folder.

Documents can be edited in workspaces only. If you want to modify a published document, you need to edit it in the workspace and republish it.

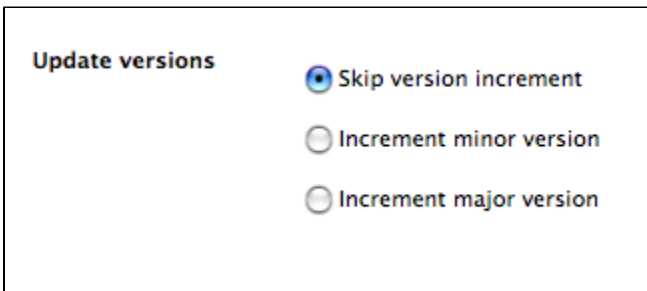
Document modification means:

- editing or changing the attached file of a [file](#) document,
- editing the text of a [note](#),
- or simply editing the title, description or any metadata of the document.

## Versioning overview

Every time you modify a document, you can define if the changes should be saved in a new version of the document.

Every document holds a version number, which is a piece of information about the evolution of the document. A version number (V.v) is composed of a major version number (V) and a minor version number (v). When a document is created, its version number is 0.0. Minor version increment are used for secondary changes. Major version increment is usually reserved to significant modifications.



When you edit a document and save your modifications, you have several options regarding the versioning of your document. Let's say that your current document version is 0.1.

- You can save modifications without creating a new version of the document, as it is not yet ready. The 0.1 version of the document has been modified, so its version number becomes 0.1+ (the + indicates to other users that version 0.1 has been modified).
- You can save the modifications in a new version of the document. The version number will then be 0.2 if you increment minor version or 1.0 if you save modifications in a major version. The newly created version is automatically archived in the History tab so it's not lost when users will edit it.

## Metadata overview



Metadata are information describing some properties of the workspace, so that they are more accurately referenced. Some metadata are automatically filled in by the system, but most of them need to be filled in by users. When you create a document (file, note, workspace, section, or any other document type), its metadata are empty.

Docdil DM uses Dublin Core metadata by default. They are listed below:

Field	Description
Nature	Nature of the document.
Subjects	Topic(s) of the document.
Rights	Information about the reproduction rights of the document. Rights informations often encompass Intellectual Property Rights and Copyright.
Source	The references of the resource from which the document's content is derived (totally or partially).
Coverage	Information about the geographic reach of the document.
Created at	Date automatically filled in by the system when the document is created.
Last modified at	Date automatically filled in by the system when the document is modified.
Format	Format of the document, if any is preferred.
Language	Language used in the document.
Expire on	Date on which the document stops being valid. Click on the calendar icon to select a date. This date is not indexed in the system. It is just in indication for users but it is not processed by the application.
Author	User who created the document. This field is automatically filled in by the system.
Contributors	Users who modified the document. This field is automatically filled in by the system.

Although metadata are not mandatory, filling them in will make your documents easier to find using Docdil DM search engine or virtual navigation.

 Coverage and subjects are used for virtual navigation.

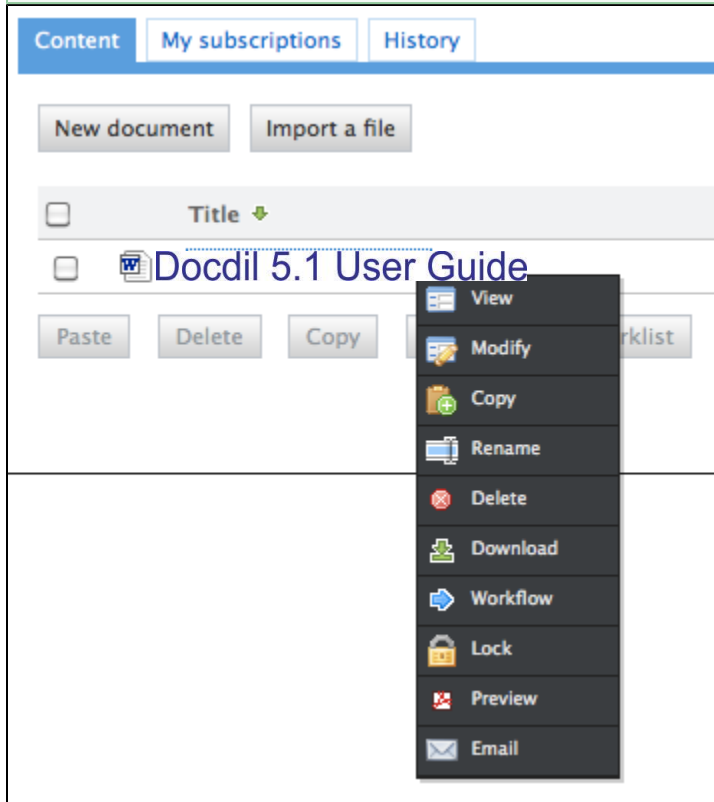
To fill in or change the metadata of the document, just edit the document.

**Edit a document**

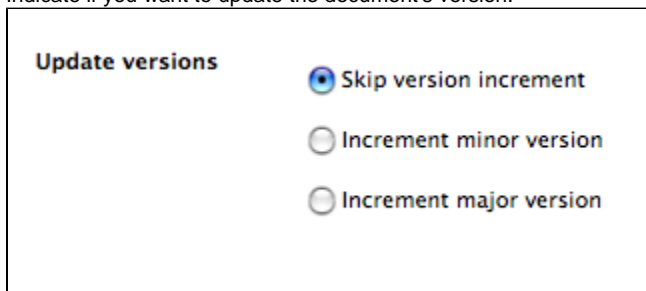
### To edit a document:

1. Click on the **Edit** tab of the document.

You can also access the **Edit** tab directly from the folder's content using right click on the document and clicking on **Edit**.



2. In the modification form displayed, type your modifications.
3. Indicate if you want to update the document's version.



4. Type a comment if you want to indicate why you modified the document. This comment is logged in the document's history and helps other users know what has been changed on the document.
5. Click on the **Save** button. The document's **Summary** tab is displayed.

MS Office and OpenOffice.org documents can be edited directly in their native application using [Live Edit](#) or [WebDav](#).

#### RELATED TOPICS


- [Document's history](#)
- [Working with Live Edit](#)
- [Working with WebDAV](#)

### Deleting content

Only users with 'Write' or 'manage everything' rights can delete documents from a space.

Deleting a document occurs in two steps:

1. A user moves a document to trash.
2. The manager of the space deletes the document permanently.

 The trash tab is displayed to users with management rights.

There are two ways to move a document into the **Trash** tab:

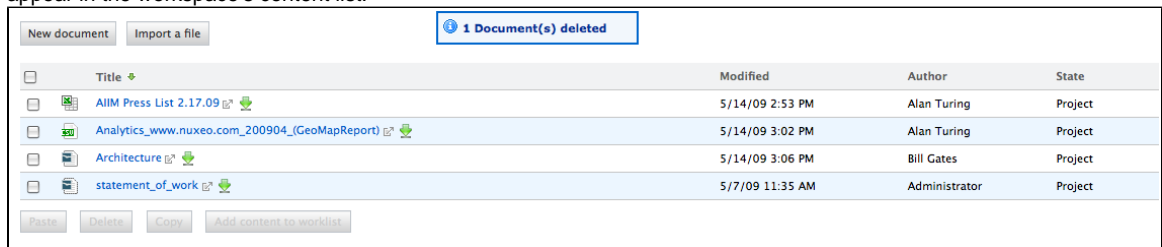
- Deleting it from the workspace content table,
- submitting the document to a [workflow](#), with the destination lifecycle state 'deleted'.


If you are sure that the document is to be deleted, you can delete it from the workspace's content table. However, if you want the deletion to be approved before, you need to submit it to a [workflow](#) and specify that the destination life cycle is 'deleted'. When the workflow is ended and the deletion approved, the document is automatically moved into the **Trash** tab of the document.

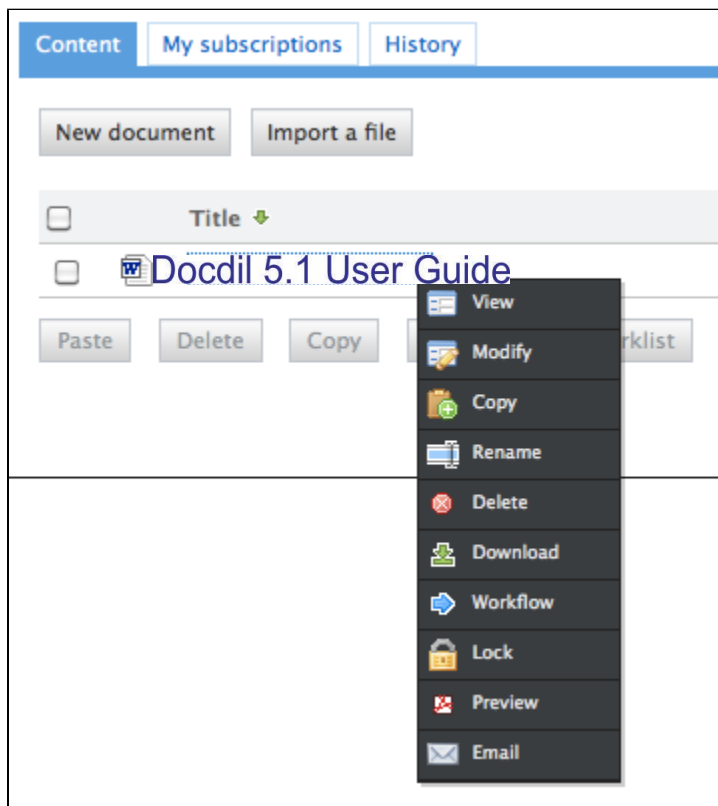
### To delete a document from the Content tab of the workspace:

1. In the **Content** tab of the workspace, check the box in front of the document's name.
2. Click on the **Delete** button.
3. On the window that pops up, click on the **OK** button.

The document is moved to the **Trash** tab of the workspace (available to users with management rights only) and does not appear in the workspace's content list.



 You can also delete documents using right click on document from the **Content** tab of the workspace.



## Notes

The note is a document that consists in a text displayed in the **Summary** tab of the document. The note is usually created using the integrated rich editor, displayed in the note creation form. This editor enables layout modifications on the text.

## Document creation [↗](#)

All the procedures to create documents

Summary
Edit
Files
Publish
Relations
Workflow
My subscriptions
Comments
History
Preview
Manage

### Description

All the procedures to create documents

How to create a note

1. Click on the New Document button.
2. On the Available document types window, click on **Workspace**.
3. Give the document a title and possibly a description.
4. Click on **Create** button.

The note's **Summary** tab is displayed.

State	Project	Version	1.0
This document is <span style="color: green;">unlocked</span>   <a href="#">Lock</a>			

Content

**Main File** Document creation.html (366 B)

Associated tags

[+ Add tags](#)

### Common metadata

- Subjects
- Rights
- Source
- Coverage

The default format of the note is HTML. The other formats available are .txt and .xml. Each format has an associate editor.

Summary
Edit
Files
Publish
Relations
Workflow
My subscriptions
Comments
History
Preview
Manage

**Title \***

**Description**

**Note**

**docdilDM** is the ultimate ready to go collaborative document management application available on the market. Based on our popular open source **ECM** platform **docdilEP**, **docdilDM** benefits from its flexibility, feature scope, scalability and IS integration capabilities **docdil DM** provides organizations with the application they need to enable their teams to work more efficiently either on a project-basis or on longer term business processes. **docdilDM** brings them the ability to create, share, annotate, store and retrieve any types of documents in their usual desktop environment. **docdil DM**

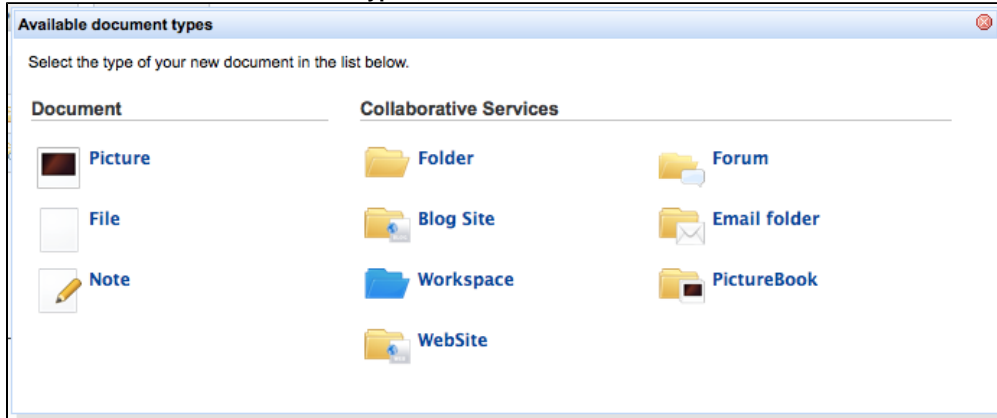
Format : Text

A note is composed of the fields below:

Field	Description
Title	Note's title
Description	Text that explains what the note is about.
Content	Text of the note created using a rich text editor.
Format	Format of the automatically created file used to export notes from Docdil DM.

### To create a note:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.



3. Fill in the document's creation form.
4. Click on the **Create** button.

You can also create a note by importing a .txt, a .html or a .xml file using **Import a file** button or drag and drop.

When the note is created, users can enhance it by adding [annotations](#), [comments](#), attached files on it, or just [editing](#) it.

## Files

A file document is composed of an attached file that you upload on the application.

You can upload files of any format.

A file is composed of:

- a title (mandatory)
- a description (optional)
- an attached file

**Studio Overview - EN** [↗](#)

Summary | Publish | Relations | Workflow | My subscriptions | Comments | History | Preview

---

**Content**

Main File

Attachments

**Common metadata**

Subjects

Rights

Source

Coverage

State	Project	Version	1.3
This document is <span style="color: green;">unlocked</span>			

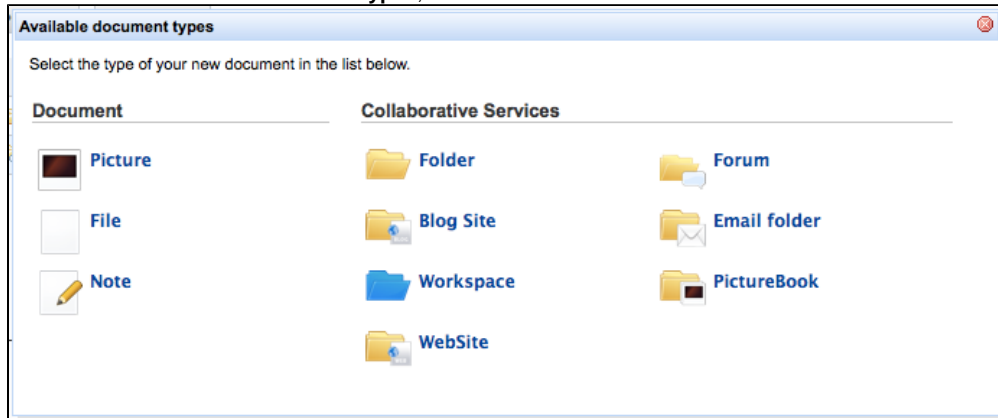
Associated tags

studio

Add tags

### To create a file:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.



3. Fill in the document's creation form.
4. Click on the **Create** button.

 You can also create a file using the **Import a file** button or using drag and drop.

When the file is created, users can enhance it by [filling its metadata](#), adding attached files on it, [annotating it](#). When the document is completed, you can [publish](#) it in one or several section(s).

## Folders

In workspaces, you can create and manage your documents in folders.

A folder works like a workspace, but the documents available for creation are limited. In a folder, you can create:

- notes
- files
- sub-folders.

There are two types of folders in Docdil DM:

- regular folders
- ordered folders.

The difference between the two folder types is the way content is sorted.

- In a regular folder, documents are sorted on the title by default. You can change the sort criterion by clicking on the content table columns title. You can thus sort them on their state, author, etc.
- In an ordered folder, you can change the order of documents manually. So, the orders in which documents are listed in the folder doesn't depend on one of its properties (version, author, etc). When a document is created, it is added at the end of the list.

### Regular folders

Regulars folders, called "Folders", have the same behavior as workspaces. In a folder, you can:

- create documents and do all the actions available on them (edit, approve, manage relations, etc)
- [manage access rights](#),
- [subscribe to and manage alerts](#),
- [manage the folder's trash](#).

Like in a workspace, you can use drag & drop to create content in a folder.

### Ordered folders

Ordered folders are folders in which you can change the content's order.

An ordered folder has the same presentation as a regular folder, but it has some additional buttons below the content table:

- Move up
- Move down
- Move to top
- Move to bottom

### To change the content's order:

1. Select a document using the checkbox on the left.  
The move buttons are available.

**My project**

Content Edit Alerts History

New Items/page: 20

<input type="checkbox"/>	Title	Modified	Author	Version	State
<input type="checkbox"/>	Functional specifications	10/5/10 5:57 PM	John Doe	1.0	Project
<input type="checkbox"/>	Metadata mapping	10/5/10 6:08 PM	John Doe	1.1	Project
<input type="checkbox"/>	Graphic resources	10/5/10 5:57 PM	John Doe		Project
<input type="checkbox"/>	Contract	10/5/10 5:58 PM	John Doe	1.0	Project
<input type="checkbox"/>	Meeting reports	10/5/10 6:08 PM	John Doe		Project
<input checked="" type="checkbox"/>	Project team	10/5/10 6:09 PM	John Doe	1.0	Project

Paste Add to wishlist Copy Delete

Move to bottom Move down Move to top Move up

2. Click on the move button you need.
3. The document is moved in the list of documents available in the folder.

**My project**

Content Edit Alerts History

New Items/page: 20

<input type="checkbox"/>	Title	Modified	Author	Version	State
<input checked="" type="checkbox"/>	Project team	10/5/10 6:09 PM	John Doe	1.0	Project
<input type="checkbox"/>	Functional specifications	10/5/10 5:57 PM	John Doe	1.0	Project
<input type="checkbox"/>	Metadata mapping	10/5/10 6:08 PM	John Doe	1.1	Project
<input type="checkbox"/>	Graphic resources	10/5/10 5:57 PM	John Doe		Project
<input type="checkbox"/>	Contract	10/5/10 5:58 PM	John Doe	1.0	Project
<input type="checkbox"/>	Meeting reports	10/5/10 6:08 PM	John Doe		Project

Paste Add to wishlist Copy Delete

Move to bottom Move down Move to top Move up

You can move one document at a time. If you select more than one document, the move buttons will deactivate.

## Working using drag and drop

Docdil DM allows the import of documents from your desktop using drag and drop.

Depending on the version of Docdil DM that you use, you may need to install an extension to enable drag and drop import.

- Docdil DM 19.2.2, drag and drop is based on the HTML 5 standard and is available without extension, on all browsers that support the HTML 5 Drag and drop. For browsers that don't support HTML, such as Internet Explorer, you need to install the Drag and Drop extension.
- On previous versions of Docdil DM, you need to install the extension that correspond to your browser to be able to import documents from your desktop using drag and drop. Extensions are available for Firefox and Internet Explorer from the authentication page of Docdil DM and from the download dedicated page on Docdil.com.

Supported browser versions are listed below:

- Firefox 2 and later,
- Internet Explorer 6.0 and later.

On the browser versions that support HTML 5, if you installed the D&D extension, it is automatically disabled so that HTML 5 drag and drop is used.

## Install Drag and Drop extensions

Drag and Drop extensions are available for the two officially supported browsers: Firefox and Internet Explorer.

## Install Firefox extension

The Docdil D&D extension for Firefox is available from the plugins download page.

It comes as a standard Firefox add-on. Installing process is the same as the other available Firefox add-ons: click on the link on the [download page](#) and follow the instructions.

## Install Internet Explorer extension

To make drag and drop available on Internet Explorer, you need to install the Internet Explorer extension available from [plugins download page](#).

The extension is available in 2 formats:

- .exe: includes the drag and drop package and the needed dependencies
- .msi: includes only the drag and drop package

To install the Internet Explorer extension, follow the instructions of the installer.

## Importing content using Drag and Drop

You can use Drag and Drop to easily import content into Docdil DM or just to create one document at a time. Two types of import are available:

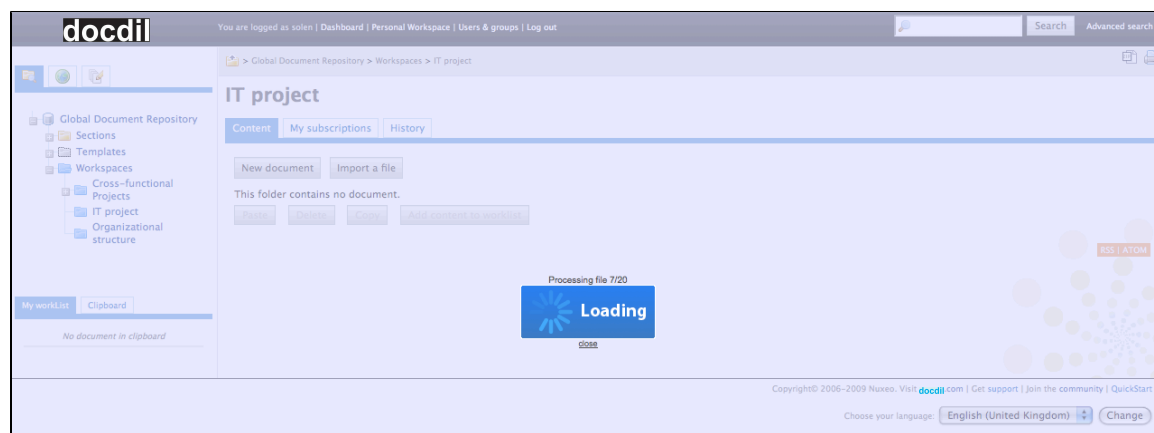
- **quick import**, that enables to quickly create documents in workspace;
- **import with metadata**, that enables to fill in metadata of the document(s) before they are created in the workspace.

### Quick import of documents

To import content into Docdil DM, drag an item from your computer and drop it into a workspace. The document is then automatically created in the workspace and its title is the name of the original file, and no metadata is filled in.

You can drag and drop on or more files in Docdil DM.

✔ If you use the drag and drop extension, you can drag and drop folders in workspaces. The complete structure of the dropped folder is then reproduced and created in Docdil DM.



You can drop any file type in Docdil DM. Here are some examples of most commonly used item types and their output in Docdil DM:

Item type	Document created in Docdil DM
Folder	Folder
Microsoft Office file	File
OpenOffice.file	File
.txt file	Note
Picture (.jpg, .png, etc)	Picture

### Import with metadata

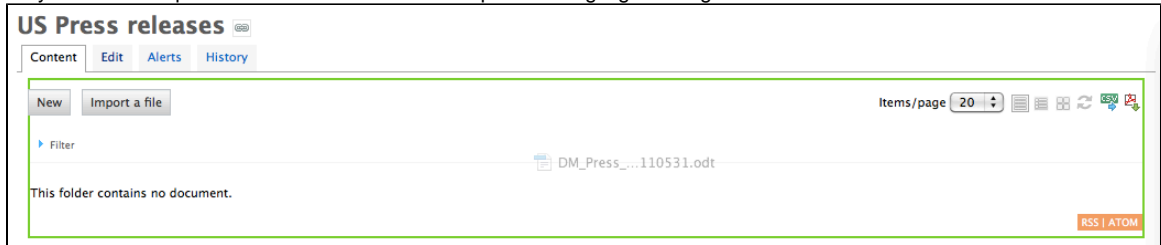
ℹ Import with metadata is available from Docdil DM 19.2.2 on browsers that support the HTML 5 drag and drop standard.



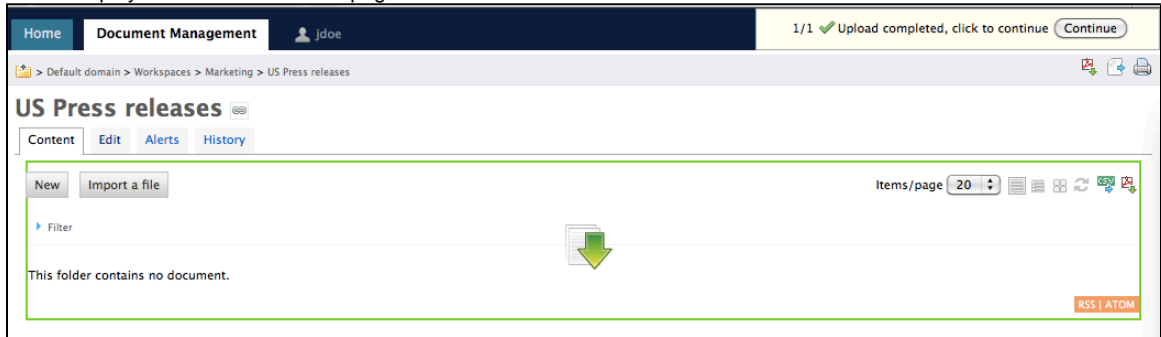
It is possible to do a drag and drop import of documents with an additional step to fill in some metadata. This prevents users from editing the documents after the import is done.

### To import documents with metadata:

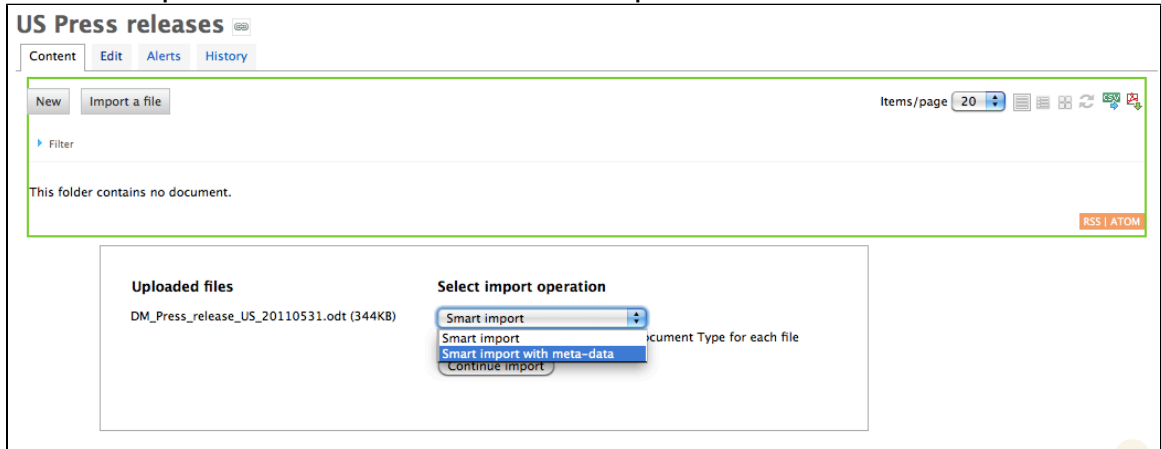
1. Drag your file from your desktop to the workspace main area in the browser, but don't drop it. The drop area is highlighted in blue.
2. Stay on the workspace a few seconds until the drop area is highlighted in green.



3. Drop the file. The file is uploaded. When the upload is done, a "Continue" button is displayed in the top right corner of the page and an icon is displayed in the center of the page.

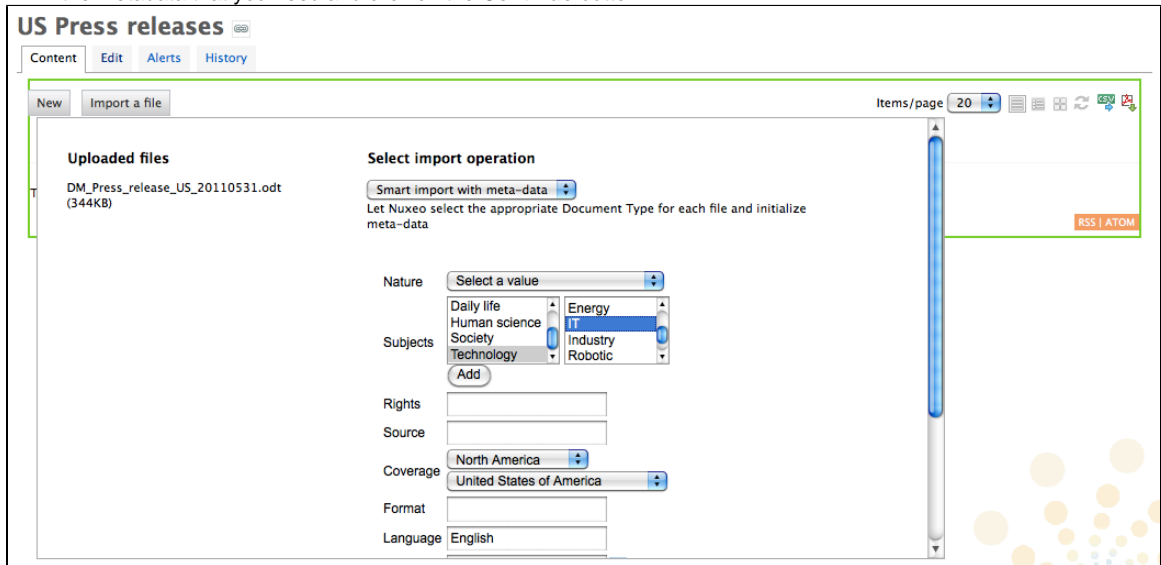


4. Click on the icon or the "Continue" button. A window pops up, that enables you to select if you want to do a quick import (smart import) or an import with metadata.
5. Select **Smart import with metadata** and click on the **Continue import** button.

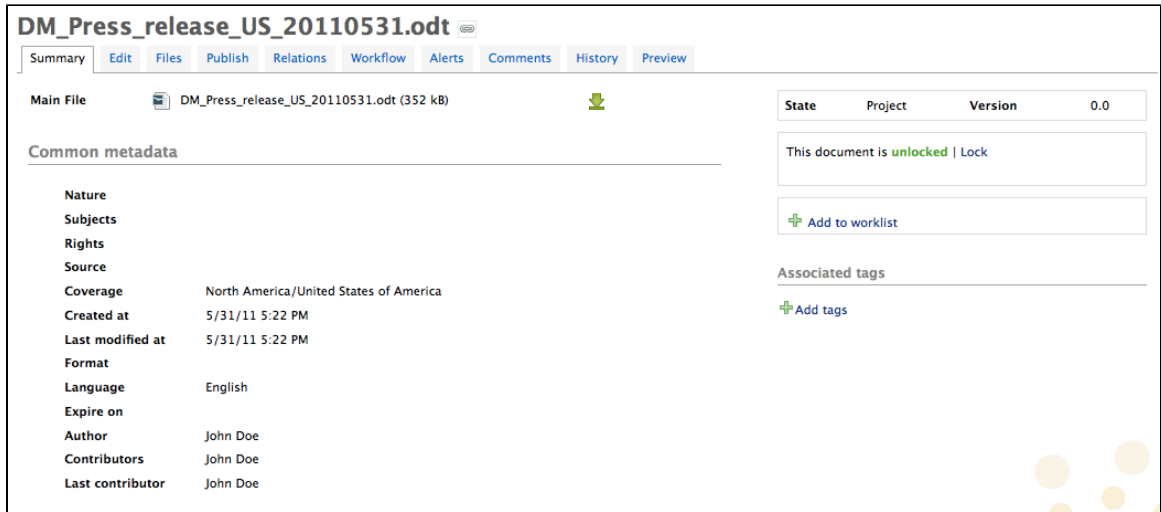


The metadata are displayed on the pop up window.

6. Fill in the metadata that you need and click on the **Continue** button.




The file is created with the filled in metadata.



## Desktop & Office Suites Integration

To ease office documents integration, Docdil DM proposes two ways to create and edit document from their native application.

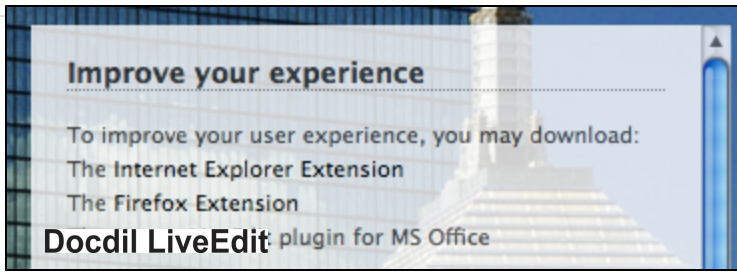
- **Docdil Live Edit enables you to create and edit office documents in their native application from Docdil DM. Docdil Live Edit is available as an extension to be installed on the user's computer. It is available from Microsoft Office and OpenOffice.org.**
- **Docdil WSS enables you to work on Docdil's documents from your desktop directly. Docdil WSS is available for Microsoft Office only and doesn't require any installation on the user's computer.**

 Extensions are available from the authentication page of Docdil DM.

### Working with Live Edit

Docdil Live Edit is a Docdil DM extension that enables users to open Microsoft Office and OpenOffice.org documents in their native application from Docdil. This extension prevents you from the painful process of downloading - editing - uploading office documents in the application.


Live Edit comes as an extension that needs to be installed on the user's computer. It can be downloaded from Docdil DM's authentication page.



Live Edit is available for:

- MS Office,
- OpenOffice.org.

Docdil Live Edit targets Microsoft Office 2003/2007 and OpenOffice.org 3.3. It is known to work with Internet Explorer 7 and Firefox 3.6.

 Live Edit can be used on Windows and Linux environments.

Live Edit allows you to:

- create documents in MS Office and OpenOffice.org,
- edit documents in MS Office and OpenOffice.org.

### Before you start

Before you start using Live Edit to create and edit documents:

- you may want to take a look at the [Live Edit compatibility table](#),
- please check your certificate is validated if your Docdil DM uses HTTPS. If your certificate is not validated, Live Edit won't work.

### Create office documents

To create office documents directly into Docdil DM, follow the procedure below.

1. Click on one of the MS Office or OpenOffice.org icon displayed below the search box.
2. The application corresponding to the icon you clicked on opens.
3. Type the content of your document.
4. Save your modifications in Docdil DM:
  - By closing the application.
  - By clicking Save in Docdil in the Add-Ins menu of the application.  
A Save in Docdil window opens.
5. Give the document a title and a description, and select where to save the document in Docdil DM.
6. Click on **OK** button.  
The document is automatically saved in Docdil DM.

### Edit documents

Documents that can be edited with Live Edit are indicated by the icon in the **Content** tab of the parent folder and in the **Summary** tab of the document.

When you edit a document online using Live Edit, the document is automatically locked in Docdil DM. It is automatically unlocked when you close the file from Microsoft Office or OpenOffice.org.

1. Click on the online edition icon of the document.  
The document opens in the appropriate application.
2. Modify the file.
3. When done, close the editing application.  
A window pops up.
4. Indicate if you want to save the modifications.  
The modified file is automatically uploaded on the Docdil DM application.

### Installing Live Edit

Live Edit works with Microsoft Office and OpenOffice.org. It is available for Internet Explorer and FireFox browsers. The table below summarizes the extensions and packages you need to install for each OS and browser.

	Internet Explorer	FireFox
--	-------------------	---------

<b>Microsoft Office</b>	Live Edit MS Office-IE (.msi)	Live Edit MS Office-IE (.msi) FireFox Protocol Handler
<b>OpenOffice.org</b>	Live Edit MS Office-IE (.msi) Live Edit OOo Distribution (.exe)	Live Edit OpenOffice.org extension (.otx) FireFox Protocol Handler

Below are the instructions to install Live Edit:

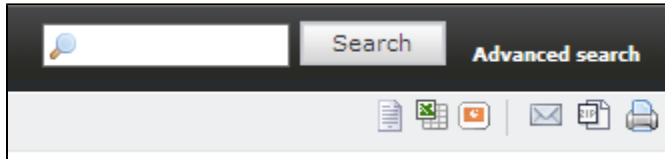
- for MS Office and Internet Explorer users,
- for MS Office and Firefox users,
- for OpenOffice.org and Internet Explorer users,
- for OpenOffice.org and Firefox users.

**For MS Office and Internet Explorer users**

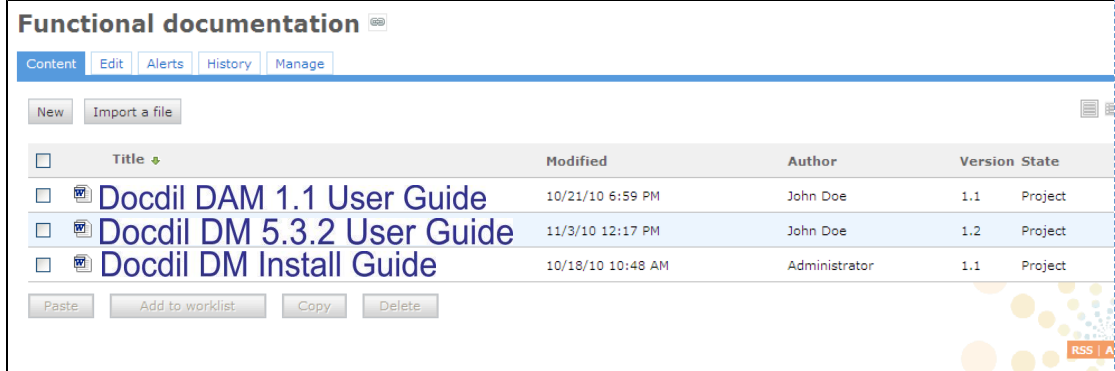
**To install Live Edit for MS Office:**

1. Run the Live Edit installer and follow the instructions.
  2. If you are using Internet Explorer, close all windows and restart it.
  3. Go on your Docdil application.
- You now have new icons displayed:

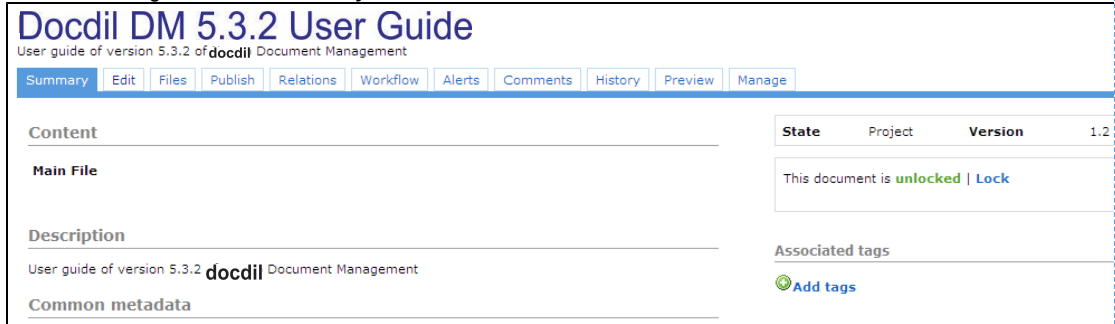
- MS Office icons below the search box



- an online editing icon in the workspace listing for MS office documents



- an online editing icon in the **Summary** tab of MS office documents



You can now edit documents online.

**For MS Office and FF users**

Making LiveEdit work for MS Office documents when you use FireFox takes 3 steps:

1. Install Live Edit for MS Office,
2. Install the FireFox extension for Live Edit, called protocol handler,
3. Configure the FireFox protocol handler.

**Install Live Edit for MS Office**

—You need to install [Live Edit for Microsoft Office](#) using the same installer as for MS Office and Internet Explorer: just run the installer and follow the instructions displayed.

At the end of this step, you won't see the online editing icons, because you need to install and configure the FireFox protocol handler.

### Install Firefox Protocol Handler

The [Firefox Live Edit extension](#) is a regular Firefox extension and gets installed the same way as any other extension on that browser.

To install it, click on the link to download it and follow the instructions displayed.

At this stage, you still won't see the online editing icons in Docdil DM. To see the icons and be able to edit documents, you need to configure the protocol handler.

### Configure the Firefox protocol handler

#### To configure Live Edit Firefox Protocol Handler:

1. In Firefox, go to Tools > Add-ons > Docdil Live Edit Protocol Handler > Preferences (or Options).
2. Change the temp folder : /tmp/ with C:\Temp (or another temp folder like C:\Windows\Temp)
3. Set the mime-types you want to use Live Edit with and click on **Add new mapping** (see below for the mimetypes mapping).
4. Be sure that the checkbox "Use NXWss" is un-checked.
5. Be sure to check correctly "Preserve compatibility".



Since version 0.4.6 of the protocol handler, there is a checkbox labeled "Preserve compatibility" that allows to preserve the backward compatibility. This box **must** be checked when the targeted server is pre 5.2. Without checking it, the add-on is forming a different type of headers allowing using of a bunch of new features like WebEngine (but it works only for the server 5.2 +). Simple said:

- if Live Edit appear not to work (there is no available Edit online link) and the targeted Docdil server is not 5.2 or higher, check that the "Preserve compatibility" is marked.
- if some cool features like WebEngine are not available (throwing exception) and the targeted Docdil server is 5.2 or higher, check that the "Preserve compatibility" is not marked.

6. Click **Ok**.

### MS Office mimetype mapping with MS Office

File extension	Mimetype	Editor command	Editor command arguments
.doc	application/msword	C:\Program Files\Docdil\Docdil Live Edit MsOffice IE\Docdil-liveedit-msoffice-launcher.exe	%s
.xls	application/vnd.ms-excel	C:\Program Files\Docdil\Docdil Live Edit MsOffice IE\Docdil-liveedit-msoffice-launcher.exe	%s
.ppt	application/vnd.ms-powerpoint	C:\Program Files\Docdil\Docdil Live Edit MsOffice IE\Docdil-liveedit-msoffice-launcher.exe	%s
.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document	C:\Program Files\Docdil\Docdil Live Edit MsOffice IE\Docdil-liveedit-msoffice-launcher.exe	%s
.xlsx	application/vnd.openxmlformats-officedocument.spreadsheetml.sheet	C:\Program Files\Docdil\Docdil Live Edit MsOffice IE\Docdil-liveedit-msoffice-launcher.exe	%s

.pptx	application/vnd.openxmlformats-officedocument.presentationml.presentation	C:\Program Files\Docdil\Docdil Live Edit MsOffice IE\Docdil-liveedit-msoffice-launcher.exe	%s
-------	---	--	----

### For OpenOffice.org and IE users

To make Live Edit work when you use OpenOffice.org and Internet Explorer, you need to:

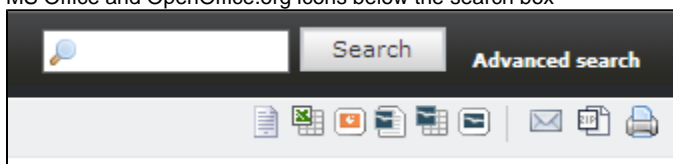
1. install the [MS Office - IE Live Edit](#) (see [LiveEdit-MSO-IE-forFF](#))
2. install the [OpenOffice.org - IE Live Edit extension](#)

#### To install Live Edit for OpenOffice.org and Internet Explorer:

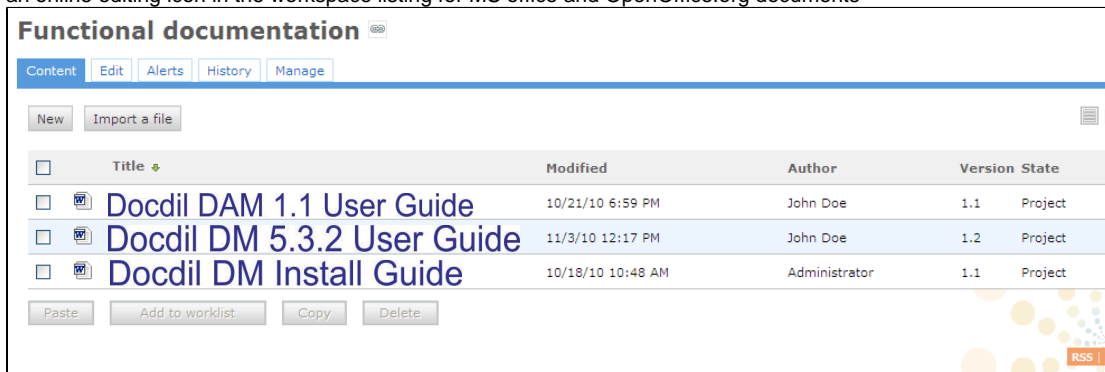
1. Run the [OpenOffice.org - IE Live Edit installer \(.exe\)](#) and follow the instructions displayed.
2. Restart Internet Explorer if you have windows open.
3. Go on your Docdil application.

You now have new icons displayed:

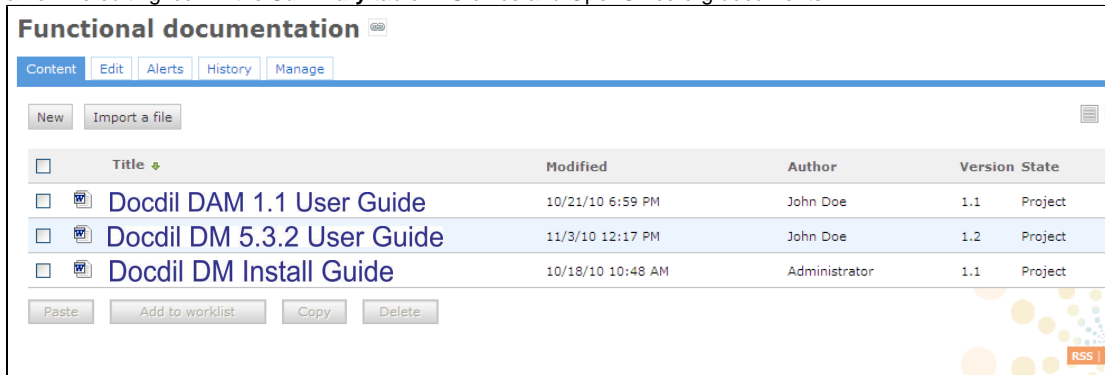
- MS Office and OpenOffice.org icons below the search box



- an online editing icon in the workspace listing for MS office and OpenOffice.org documents



- an online editing icon in the **Summary** tab of MS office and OpenOffice.org documents



You can now edit documents online.

### For OpenOffice.org and Firefox users

To be able to edit OpenOffice.org documents online using Firefox, you need to:

1. install the [Live Edit OpenOffice.org extension \(.otx\)](#),
2. install the [Firefox protocol handler](#),
3. configure the [Firefox protocol handler](#).

#### Install the Live Edit OpenOffice.org extension

The [Live Edit extension for OpenOffice.org](#) is a regular OOo extension and gets installed the same way as any other extension: just double-click the .otx file and follow the instructions.

Then you need to install and configure the Firefox extension.

### Install Firefox Protocol Handler

The [Firefox Live Edit extension](#) is a regular Firefox extension and gets installed the same way as any other extension on that browser.

To install it, click on the link to download it and follow the instructions displayed.

At this stage, you still won't see the online editing icons in Docdil DM. To see the icons and be able to edit documents, you need to configure the protocol handler.

### Configure the Firefox protocol handler

#### To configure Live Edit Firefox Protocol Handler:

1. In Firefox, go to Tools > Add-ons > Docdil Live Edit Protocol Handler > Preferences (or Options).
2. Change the temp folder : /tmp/ with C:\Temp (or another temp folder like C:\Windows\Temp)
3. Set the mime-types you want to use Live Edit with and click on **Add new mapping** (see below for the mimetypes mapping).
4. Be sure that the checkbox "Use NXWss" is un-checked.
5. Be sure to check correctly "Preserve compatibility".



Since version 0.4.6 of the protocol handler, there is a checkbox labeled "Preserve compatibility" that allows to preserve the backward compatibility.

This box **must** be checked when the targeted server is pre 5.2.

Without checking it, the addon is forming a different type of headers allowing using of a bunch of new features like WebEngine (but it works only for the server 5.2 +). Simple said:

- if Live Edit appear not to work (there is no available Edit online link) and the targeted Docdil server is not 5.2 or higher, check that the "Preserve compatibility" is marked.
- if some cool features like WebEngine are not available (throwing exception) and the targeted Docdil server is 5.2 or higher, check that the "Preserve compatibility" is not marked.

6. Click **Ok**.

### OpenOffice.org and MS Office mimetype mapping with OpenOffice.org

File extension	Mimetype	Editor command	Editor command arguments
.doc	application/msword	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.xls	application/vnd.ms-excel	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.odt	application/vnd.oasis.opendocument.text	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.ods	application/vnd.oasis.opendocument.spreadsheet	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)
.odp	application/vnd.oasis.opendocument.presentation	C:\Program Files\OpenOffice.org 3\program\soffice.exe	macro:///LiveEditOOo.launcher.load(%s)



Live Edit OpenOffice.org is not compatible with MS Office 2007 documents yet.

### For Google Chrome users under MS Windows

For Windows users, Chrome will use Windows registry where DocdilLiveEdit protocol is declared (LiveEdit for MSIE must be installed). However some steps are needed to configure your computer and the server.

On your machine, you need to force Chrome to handle `nxedit` protocol:

- close Google Chrome because at shutdown it dumps its properties in the file we'll modify
- edit the `Local State` file located under

- XP: C:\Documents and Settings\\Local Settings\Application Data\Google\Chrome\User Data
- Vista/7: C:\Users\\AppData\Local\Google\Chrome\User Data
- add the protocol **nxedit** under the `protocol_handler` section, as such:

```

"protocol_handler": {
  "excluded_schemes": {
    ...
    "nxedit": false,
    ...
  }
}

```

If the section `protocol_handler` doesn't exist, find a `mailto` link and follow it, it should initialize this section.

Server side, because we don't have yet a mechanism to detect that LiveEdit is configured, you have to set a property to allow LiveEdit on each document type. As a consequence, you'll have to pay attention when clicking on LiveEdit links

- for Docdil DM >= 5.3.2, edit `$Docdil_HOME/templates/common/config/Docdil.properties`
- for Docdil DM < 5.3.2, directly edit `$Docdil_HOME/server/default/deploy/Docdil.ear/config/Docdil.properties`
- change the value for the property `org.Docdil.ecm.platform.liveedit.config` from client to server (uncomment the line if needed)
- restart Docdil DM

### Live Edit compatibility table

The table below states the compatibility of Live Edit plugins with different versions of browsers and office software, for Docdil DM 19.2+.

Tested versions of Live Edit are:

- Live Edit MS Office-IE (.msj): 2.2.1
  - Live Edit OpenOffice Distribution (.exe): 2.2.1
  - FireFox Protocol Handler: 0.4.11
- More information on the plugin / environment correspondence on the [Live Edit Installation page](#).



#### Internet Explorer 9 compatibility

For the moment, if you want to use Live Edit with the client side detection in Internet Explorer 9, you need to activate the "Internet Explorer 9 Compatibility view" browsing mode (F12 developer tools).

This is due to the fact that IE 9 decides to truncate the `HTTP_ACCEPT` header. For instance:

- with IE 9 in default browsing mode, the `HTTP_ACCEPT` header looks like this:

```
text/html, application/xhtml+xml, */*
```

- with IE 9 in compatibility mode, the `HTTP_ACCEPT` header is:

```
image/jpeg, application/x-ms-application, image/gif, application/xaml+xml, image/pjpeg, application/x-ms-xbap,
application/vnd.ms-excel, application/vnd.ms-powerpoint, application/msword,
application/x-Docdil-liveedit;ext0="application/vnd.ms-excel",
application/x-Docdil-liveedit;ext0="application/vnd.openxmlformats-officedocument.spreadsheetml.sheet",
application/x-Docdil-liveedit;ext0="application/vnd.openxmlformats-officedocument.presentationml.presentation",
application/x-Docdil-liveedit;ext0="application/vnd.openxmlformats-officedocument.wordprocessingml.document",
application/x-Docdil-liveedit;ext1="application/vnd.ms-powerpoint",
application/x-Docdil-liveedit;ext2="application/msword", */*
```

If you don't change the browsing mode, we are not able to detect the Live Edit installation from the client, but you can force it in the server configuration.

### Windows XP environment


	Internet Explorer 7	Internet Explorer 8	Firefox 3.6.3	Firefox 4
Microsoft Office 2003	OK, except for a minor issue: <a href="#">LIVED-187</a>	OK, except for a minor issue: <a href="#">LIVED-187</a>	OK, except for a minor issue: <a href="#">LIVED-187</a>	Testing in progress




<b>Microsoft Office 2007</b>	Tested OK on development branch, but minor issues: <del>LIVED-163</del> <del>LIVED-164</del> <del>LIVED-166</del> Tests on Live Edit 2.2.1 in progress	Testing in progress	Tested OK on development branch, but minor issues: <del>LIVED-163</del> <del>LIVED-164</del> <del>LIVED-166</del> Tests on Live Edit 2.2.1 in progress	Testing in progress
<b>OpenOffice.org 3.3</b>	OK	OK	OK	Testing in progress

### Windows 7 environment

#### Windows 7 64b

 Docdil LiveEdit Microsoft Office is only compatible with Office in 32bits. Beware about it's detection inside Internet Explorer, for the moment, out of the box, it will only be possible with the 32bits version of your browser.

	<b>Internet Explorer 7</b>	<b>Internet Explorer 8</b>	<b>Firefox 3.6.x</b>	<b>Firefox 4</b>
<b>Microsoft Office 2007</b>	Testing in progress	OK except for LIVED-163	Testing in progress	OK except for LIVED-163
<b>Microsoft Office 2010</b>	LIVED-149	LIVED-149	LIVED-149	LIVED-149
<b>OpenOffice.org 3.3</b>	Testing in progress	Testing in progress	Testing in progress	Testing in progress

 To enable the detection of your LiveEdit installation with Internet Explorer running in 64bits mode, you need to import this file into your registry (regedit).

- Docdil LiveEdit Internet Explorer (64bits) fix: liveedit-ie-x64-fix.reg

As LiveEdit installer is only built in 32bits yet, Windows will wrote the registry entries into a compatibility node (Wow6432Node) read by 32bits application running on 64bits OS, and this file will add necessary keys to the default registry node read.

#### Windows 7 32b

	<b>Internet Explorer 7</b>	<b>Internet Explorer 8</b>	<b>Firefox 3.6.x</b>	<b>Firefox 4</b>
<b>Microsoft Office 2007</b>	Testing in progress	Testing in progress	Testing in progress	Testing in progress
<b>Microsoft Office 2010</b>	Testing in progress	OK	Testing in progress	Testing in progress
<b>OpenOffice.org 3.3</b>	Testing in progress	Testing in progress	Testing in progress	Testing in progress

## Manage your own file with LiveEdit

### How to enhance Live Edit to take care of your own file type

By default, we recognize default office files (doc, docx, xls, xlsx, odt, ...) for both Microsoft Office and OpenOffice.org. But sometimes, you could be interested in managing other file types with Live Edit, and launching their associated editors.

#### With Internet Explorer


Recognized extensions are managed in the Windows Registry. They are simple string values, stored in **HKEY\_LOCAL\_MACHINE\SOFTWARE\Wow6432Node\Microsoft\Windows\CurrentVersion\Internet Settings\Accepted Documents** and using this model:


In a .reg file, a new handled extension should looks like:

```
"liveedit_msoffice12_word_template"="application/x-Docdil-liveedit;ext7="vnd.ms-word.template.macroEnabled.12"
```

The key is a unique name, and in this example, it is "liveedit\_msoffice12\_word\_template".

The value is built like a MIME-TYPE: application/x-Docdil-liveedit;extX="FILE\_MIME\_TYPE". In this example, the value is: "application/x-Docdil-liveedit;ext7="vnd.ms-word.template.macroEnabled.12".


 With Internet Explorer, Live Edit will open the associated program and save the edited file into Docdil when the program ended.

 Do not forget to restart your browser after making changes.

See the attached file to enable all Microsoft Office extensions.

**With Firefox**

In the extension preferences form, you can directly add the editor / MIME-TYPE mapping. By doing this, it will be enough to enable a new extension.

 With Firefox, you just receive a file descriptor with the file URL and authentication information. You also need to add a script to download the file, start the editor and upload it when finished.

**Working with WebDAV**

Docdil DM supports the WebDAV (Web-based Distributed Authoring and Versioning) protocol and thus enables you to create and edit MS Office documents stored in Docdil DM directly from Windows or Mac OS Desktop, without having to go on your Docdil DM application.

Docdil WebDAV doesn't require any plugin installation or configuration on Docdil DM side or client side.

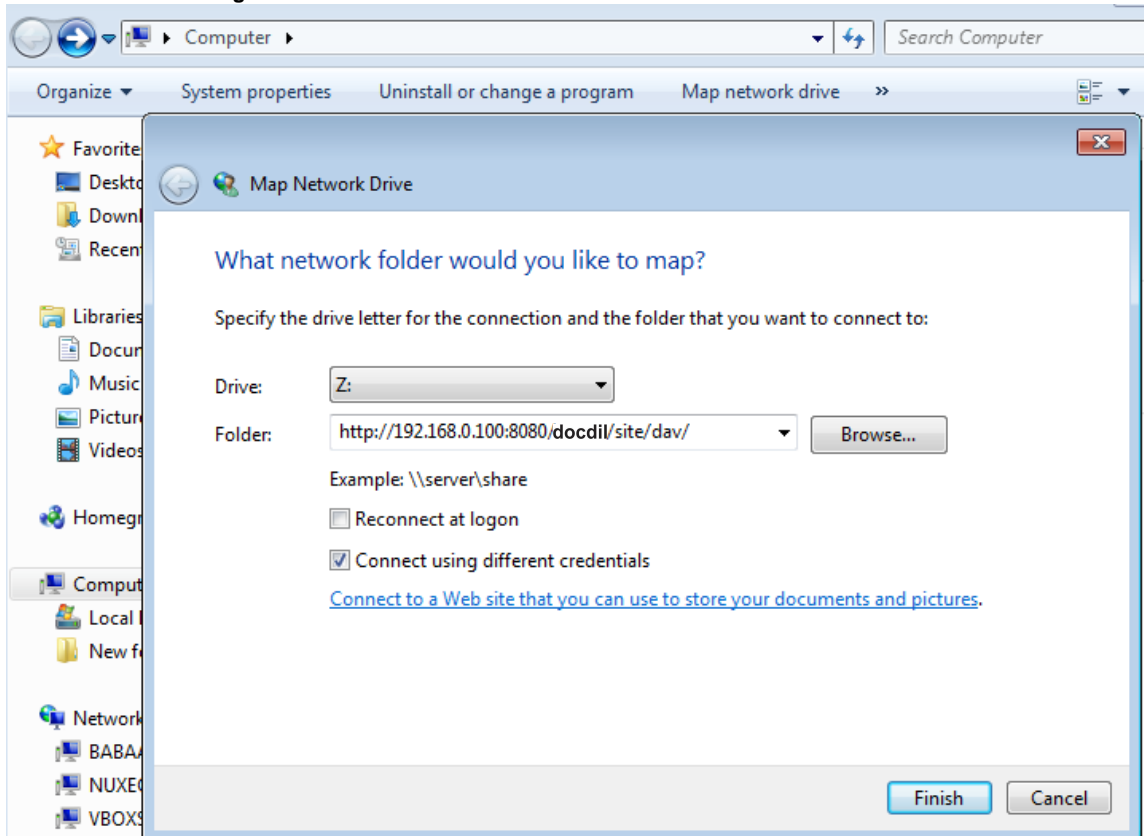
Using WebDAV, you will be able to do the following actions on Docdil MS Office documents, from Windows or Mac directly:

- create documents and folders,
- edit documents,
- move documents and folders,

Docdil DM 19.2.2 content repository can be mapped to a network drive under Windows 7. The first time you do the mapping, make sure that you have already logged in to the web interface once. This is required to setup the windows authentication protocol.

**Mapping a network drive from Windows 7 Explorer**

1. Open the Windows Explorer
2. Click **Map network drive**.
3. Choose a Drive letter.
4. In Folder, type the address of your Docdil DM application adding the site/dav/ suffix, for instance "http://localhost:8080/Docdil/site/dav/". Make sur **Connect using different credentials** is selected.



5. Click on **Finish**.

A connect window opens.

6. Type your login and your password and click on the **OK** button.

### Connect to Docdil DM from Mac OS Finder

1. From the Finder open the **Connect to Server** popup
2. Type the address of your Docdil DM application adding the site/dav/ suffix, for instance "http://localhost:8080/Docdil/site/dav/".
3. A connect window opens. Type your login and your password and click on the **OK** button.

### Connect with other WebDAV clients

The plugin comes with a default configuration which supports only a few clients among Windows 7's one, litmus, davfs, cadaver. If your usual client is not listed, you can override this configuration by adding a new file webdav-authentication-config.xml under \$Docdil /nxserver/config/ and update the list associated to the header. Below is an example where BitKinex soit added:

```
<?xml version="1.0"?>

org.Docdil.ecm.platform.wi.auth.config
  <extension
target="org.Docdil.ecm.platform.ui.web.auth.service.PluggableAuthenticationService"
point="specificChains">

    <specificAuthenticationChain name="WebDAV">
      <headers>
        <header
name="User-Agent">(Microsoft-WebDAV-MiniRedir|DavClnt|litmus|gvfs|davfs|WebDAV|cadaver
|BitKinex).*</header>
      </headers>

      <replacementChain>
        <plugin>DIGEST_AUTH</plugin>
        <plugin>WEBDAV_BASIC_AUTH</plugin>
      </replacementChain>
    </specificAuthenticationChain>
  </extension>

</component>
```

### Edit documents

You can edit a document located in the network drive (or a remote server on Mac) like any other local documents.

The document is automatically locked in Docdil DM. Modifications are saved in Docdil DM directly and when done, closing the document will unlock the Docdil DM document.

### Create content in Docdil from Windows or Mac

You can create folders and documents in Docdil from your Windows or Mac desktop.

You can then create, copy and move documents and folders in Docdil DM via the Windows Explorer or Mac Finder the same way you would do in a local folder.

To create documents in a Docdil folder or workspace, you can:

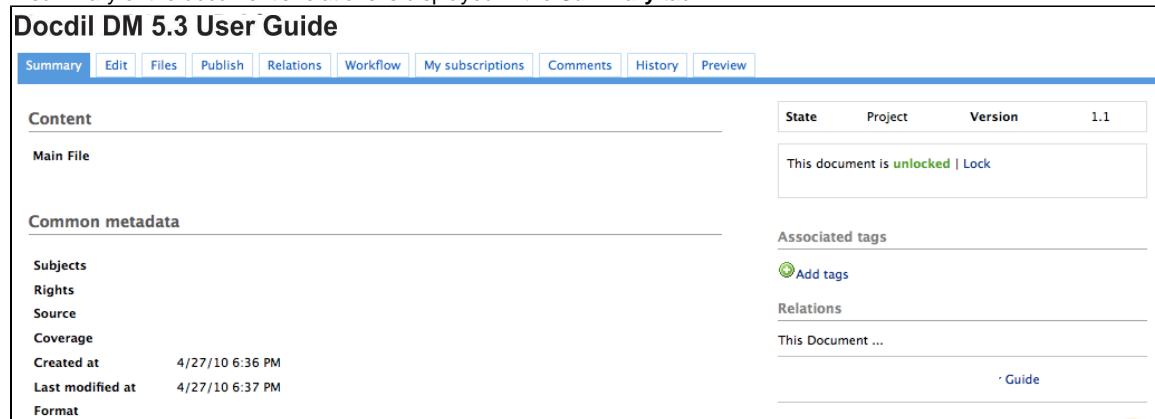
- drag and drop files from a local Windows folder into the target Docdil folder in Windows Explorer
- Create the document in the native MS Office application and save it in the Docdil folder.

## Relations

Relations are informations that connect the application's documents with other documents or external resources. Documents are thus part of a

coherent and organized structure.

A summary of the document's relations is displayed in the **Summary** tab.



**Docdil DM 5.3 User Guide**

Summary | Edit | Files | Publish | Relations | Workflow | My subscriptions | Comments | History | Preview

**Content**

Main File

**Common metadata**

Subjects  
Rights  
Source  
Coverage  
Created at 4/27/10 6:36 PM  
Last modified at 4/27/10 6:37 PM  
Format

**State** Project Version 1.1

This document is **unlocked** | Lock

**Associated tags**

Add tags

**Relations**

This Document ...

Guide

You can also see all the document's relations in the **Relations** tab of the document. In **Relations** tab, relations are sorted by outgoing and incoming relations. Outgoing relations are relations that were created from the current document. Incoming relations are relations which were created from another document and to the current document.

The objects of the relation are hyperlinks. Click on the object's name to consult it.

Available relations are:

- reference relation (references, is referenced by),
- basis relation (is based on, is base for),
- replacement relation (replaces, is replaced by),
- requirement relation (requires, is required by),
- compliance relation (conforms to, has conform).

## Add a relation

You need to have writing or management rights to add relations on a document.

You can create a relation from a document to:

- another document on the application,
- an external document (using URI),
- a text.

You can create relations between documents from different workspaces or domains.

When you add a relation on a document, it creates what we call an "outgoing" relation. The document to which you added the relation automatically has an "incoming" relation.

**To create a relation:**

1. Click on the **Relations** tab of the document.
2. Click on the **Add a new relation** link.  
The relation creation form is displayed under the link.

**Add a new relation**

Predicate\*

Text

Object\*  Resource URI

Document

Comment

3. Fill in the relation creation form.
4. Click on the **Add** button.  
The relation is displayed as an outgoing relation, under the relation creation form.

Outgoing relations					
Predicate	Object	Creation	Author	Comment	Operations
Replaces	Docdil 5.2 User Guide	4/27/10 6:39 PM	jdoe	Update for docdil 5.3 release	Delete

An incoming relation is automatically created in the target document's **Relations** tab, that directs to the source document of the relation.

Incoming relations					
Predicate	Object	Creation	Author	Comment	
Is replaced by	Docdil 5.3 User Guide	4/27/10 6:39 PM	jdoe	Update for docdil 5.3 release	

Relations are also displayed in the **Summary** tab of the document.

## Delete a relation

You need to have writing or management rights to delete the relations of a document.  
You can delete outgoing relations only.

**To delete a relation:**

1. Click on the **Relations** tab of the document.
2. Click on the **Delete** link corresponding to the relation.  
The relation is deleted and does not appear in the table anymore. It is also removed from the incoming relations of the target document.

## Comments

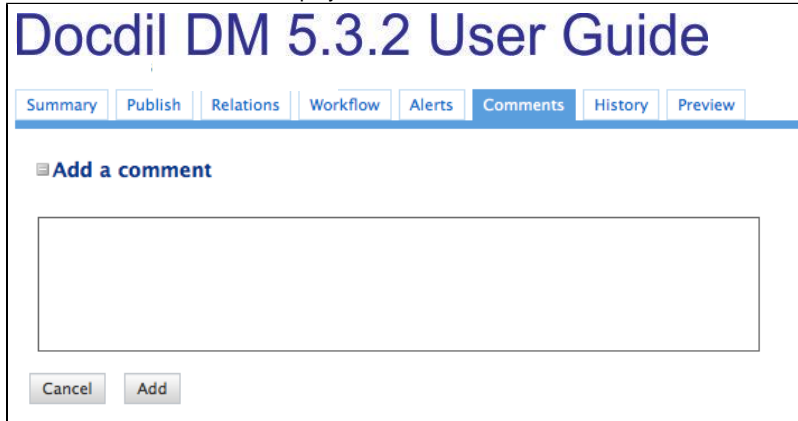
You can add comments on the documents, via the **Comments** tab. Comments enable users to discuss about the document and its evolution. Comments are attached to the document in the workspace. When the document is published, comments are not published with it. All users can see the comments added on a document.

### Add a comment on a document

You need reading rights to add comments on documents.

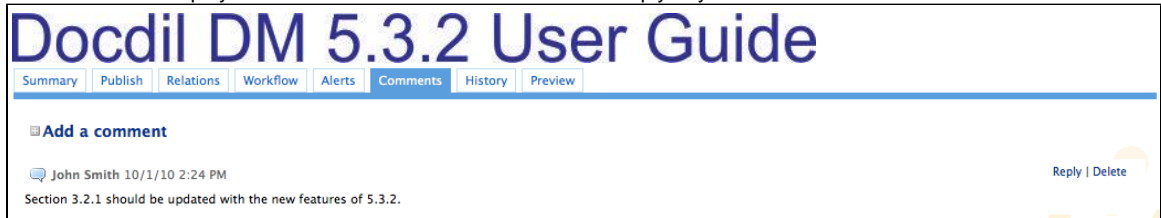
### To add a comment on a document:

1. Click on the **Comments** tab of the document.
  2. Click on the **Add a comment** link.
- A form to add a comment is displayed.



The screenshot shows the 'Docdil DM 5.3.2 User Guide' document page. At the top, there is a navigation bar with tabs: Summary, Publish, Relations, Workflow, Alerts, Comments (selected), History, and Preview. Below the navigation bar, there is a section titled 'Add a comment' with a large text input area and two buttons: 'Cancel' and 'Add'.

3. In the text area, type your comment.
  4. Click on the **Add** button.
- The comment is displayed in the **Comments** tab. Users can now reply to your comment.



The screenshot shows the 'Docdil DM 5.3.2 User Guide' document page with the 'Comments' tab selected. Below the navigation bar, there is a section titled 'Add a comment'. A comment is displayed: 'John Smith 10/1/10 2:24 PM' followed by the text 'Section 3.2.1 should be updated with the new features of 5.3.2.' To the right of the comment, there are links for 'Reply' and 'Delete'.

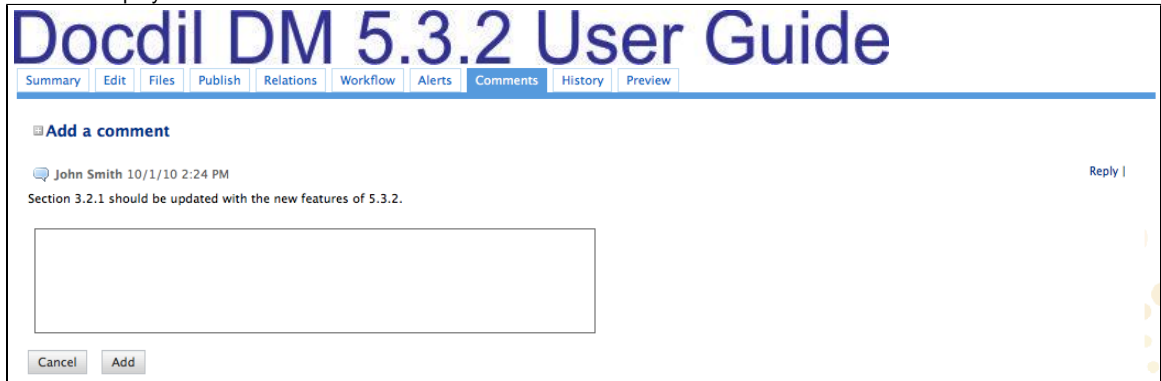
### Reply to a comment

You need to have reading rights to reply to comments on documents.

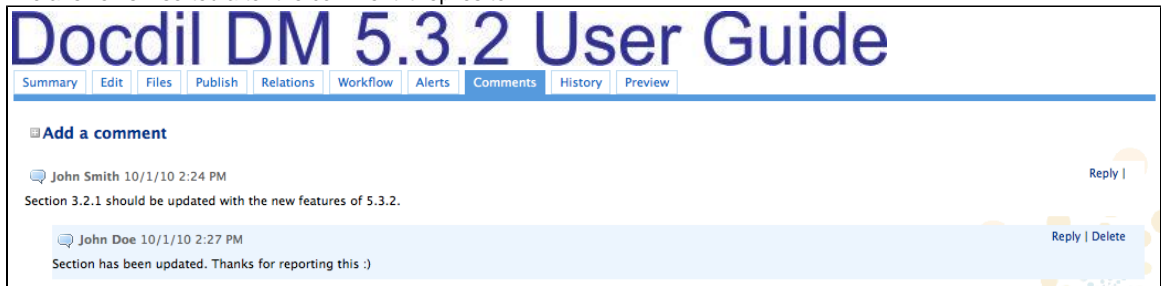
When you want to react to a comment, you can reply to it. Answers are inserted right after the comment they reply to, making it easy to read the thread of discussion.

**To reply to a comment:**

1. Click on the **Reply** link on the comment.  
A form is displayed under the comment.




2. Type your comment in the text area.
3. Click on the **Add** button.  
The answer is inserted after the comment it replies to.



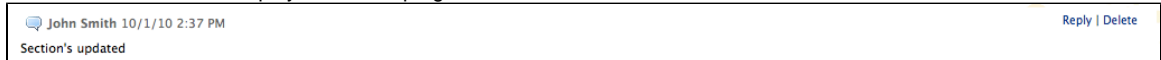
## Delete comments

Only the author of the comment and users with management rights can delete the comments of a document.

 Deleting a comment is a permanent action. You cannot restore deleted comments.

**To delete a comment:**

1. Click on the **Comments** tab of the document.
2. Click on the **Delete** link displayed in the top right corner of the comment.



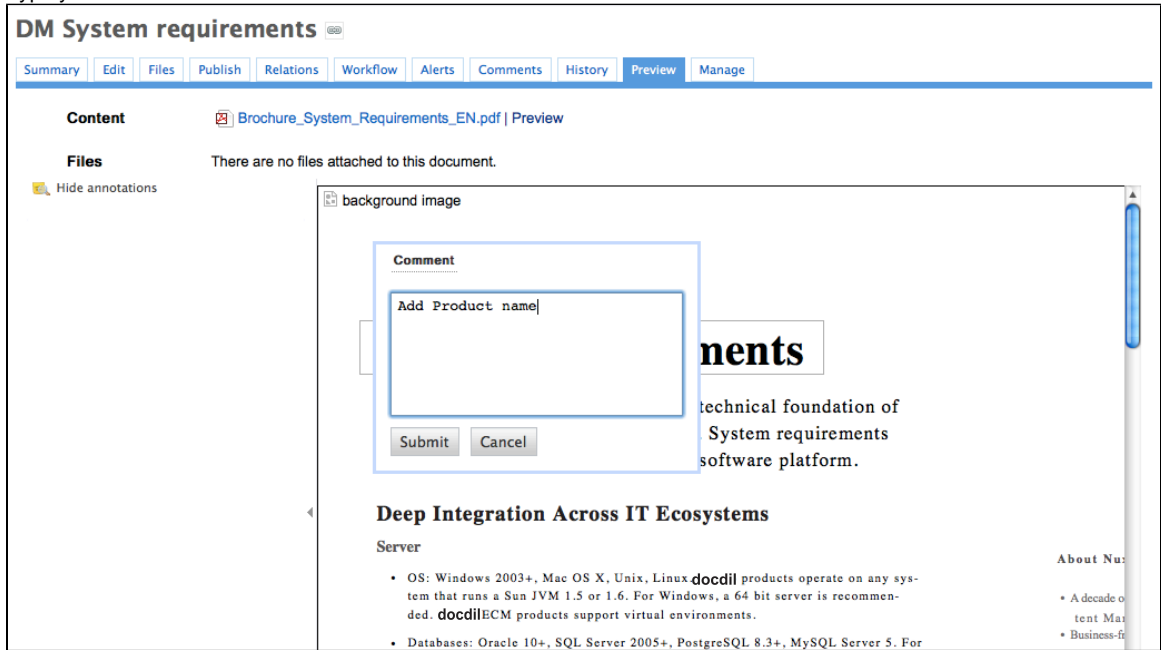
The comment is immediately erased.

## Annotations

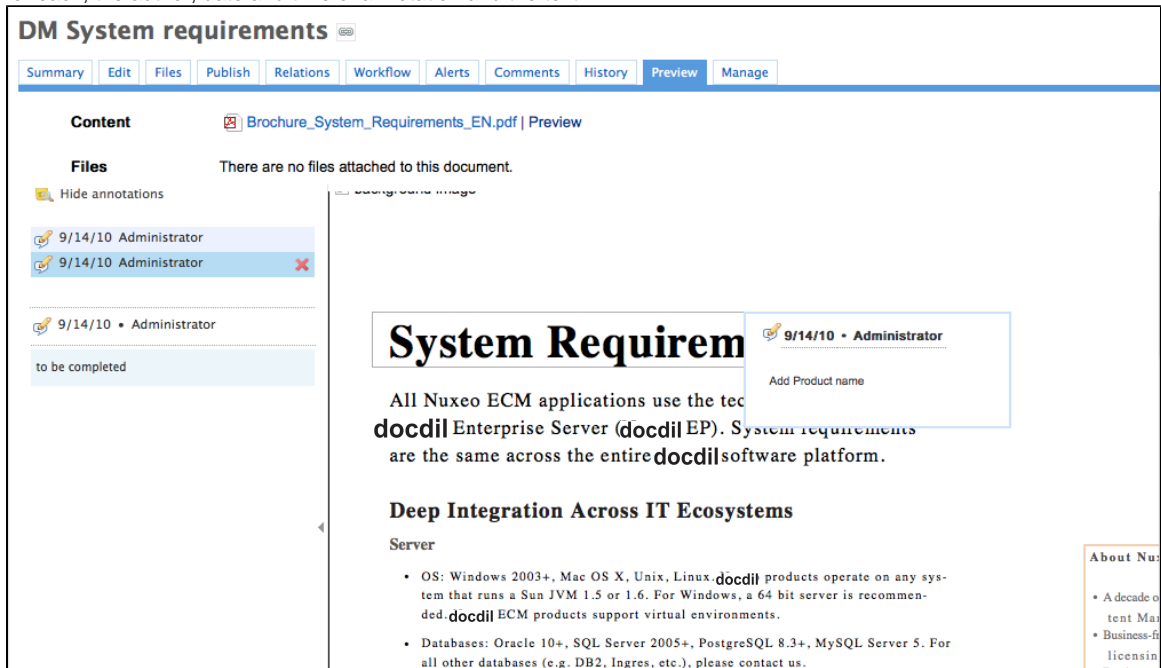
Annotations are post-its or comments placed on the preview of documents.  
You can annotate documents as soon as you can access them, ie when you have at least "Read" right.

**To annotate a document:**

1. Click on the **Preview** tab of the document.  
The document's preview is displayed.
2. Draw a frame on the preview.  
An input pop up appears.
3. Type your comment.



4. Click on "Submit".  
The annotation is saved.  
You can see your annotation when the mouse is over the zone you selected, and, in the margin, the list of annotations, and for each, the author, date and time of annotation and the text.



**Tags**

Tags are labels that you can add on documents to help you describe them. Unlike subjects in the metadata of the document, you don't have to choose tags in a closed list. You are free to apply the labels that describe the document best. However, tags are proposed as you type them, to enable you to use the same tags as the other users and have a consistent tagging of documents.



You can add as many tags on documents as you want.

You can then use the tag cloud to find all documents that have the same tags.

## Tag documents

Users can add a tag on a document as soon as they can access the document, ie as soon as they have reading rights.

Documents can be tagged in workspaces and in sections. When a document is published, the tags applied in the workspaces are not published with the document. You can have tags in the workspace that are more collaborative work oriented than in the section.


### To tag a document:

1. Go on the **Summary** tab of the document.
2. Click on the **Add tags** link.  
A text area is displayed below the link.
3. Type a label.

4. Click the button **Add tags** button.  
The tags are immediately available in the tag cloud.

## Remove tags

You need to be the user who added the tag on the document or have at least *write* right on the document to be able to remove a tag from a document.

To remove a tag from a document, click on the icon . The tag is immediately removed.

## Document's history

All the actions that are done on the document are registered in the document's history, with several informations, such as the date and time, the user, the comment, etc.

Event log						
Performed action	Date	Time	Username	Category	Comment	State
Unlock document	11/06/09	17:29	John Doe	Document		Project
Modification	11/06/09	17:29	John Doe	Document	Updated document structure	Project

To consult the document's history, click on the **History** tab.

The **History** tab also displays the previous versions of the document that were archived when the document was edited and its version increased. All previous versions can be consulted. You can also restore or delete versions.

## Viewing a previous version of a document

All users can consult the previous versions of a document.

Every time you modify a document, the previous version is automatically archived by the system. Thus, the modifications do not erase the original version of the document.

The archived versions are listed:

- below the Event log in the History tab on Docdil DM 19.2.0 to 19.2.1;
- in the "Archived versions" tab on Docdil DM 19.2.2.

Archived versions	
Version	Action
1.0	<input type="button" value="Restore"/> <input type="button" value="View archived version"/>
2.0	<input type="button" value="Restore"/> <input type="button" value="View archived version"/>
2.1	<input type="button" value="Restore"/> <input type="button" value="View archived version"/>
2.2	<input type="button" value="Restore"/> <input type="button" value="View archived version"/>

To consult a previous version of a document, click on the **View archived version** button corresponding to the chosen version. The archived version opens.

Archived versions have few actions available: you can only [create relations](#) from it to another document, [annotate](#) it and subscribe to [notifications](#).

## Restoring a older version of a document

You need to have writing or management rights to restore a previous version of a document.


Restoring an archived version means making it the current version of the document. The modifications done since that old version are thus not taken into account anymore.

To restore an archived version, click on the Restore button corresponding to the chosen version. The document is displayed as it was for the chosen version.

Archived versions			
Version	Action		
1.0	<a href="#">Restore</a>	<a href="#">View archived version</a>	<a href="#">Delete</a>
2.0	<a href="#">Restore</a>	<a href="#">View archived version</a>	<a href="#">Delete</a>
2.1	<a href="#">Restore</a>	<a href="#">View archived version</a>	<a href="#">Delete</a>
2.2	<a href="#">Restore</a>	<a href="#">View archived version</a>	<a href="#">Delete</a>

### Deleting a older version of a document

You need to have writing or management rights to delete a previous version of a document.

 Version deletion is a permanent action.

To delete an archived version, click on the **Delete** button corresponding to the chosen version. The version is immediately and permanently deleted.

### Alerts

Docdil DM includes several ways to stay informed of the evolution of the documents.

You can set alerts for yourself and you can also set alerts for other users.

To be informed of content modifications, you can subscribe to email notifications or feeds.

To keep other users notified of the space activity, you can set alerts for users or groups of users so they are automatically informed or send them occasional emails.

### Sending an email

You can send occasional emails to users, to draw their attention on the document. Emails are available on documents only.


You need to have at least reading rights to send emails.

**To send an email to a user or a group of users:**

- On the document, click on the envelope icon, located at the right of the breadcrumb trail section, next to the Print icon. The email creation form is displayed.
- Type the name of the user or group you want to send the email to, in the search box. The search is automatically done as you type the name of the user or group.

**Add New User**

Search

Users		
Type	Username	Action
	aturing (Alan Turing)	<a href="#">Add to selection</a>


**Selected Users**

Your user selection is empty

- Click on the **Add to selection** link corresponding to the users or groups whose subscriptions you want to manage. They are displayed in your selection.

**Add New User**

Search

Users		
Type	Username	Action
	aturing (Alan Turing)	<a href="#">Add to selection</a>

Selected Users	
Username	Action
aturing	<a href="#">Remove from selection</a>

- Type the subject and the content of your email.

**Subject**

Hi !

I've made important modifications on the document's structure. Can you take a look before next meeting?

Thanks!

**B** *I* U **A****B****C** |
 ☰ ☰ ☰ ☰ |
 -- Styles -- |
 Paragraph

☰ ☰ ☰ ☰ |
 ↻ ↻ |
 🔗 🔗 |
 📎 📎 |
 📎 📎 |
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- Click on the **Send** button.  
The email is send to the selected users or groups. The **Summary** tab of the document is displayed.


## Setting automatic notifications

Notifications are emails automatically sent to users when an event occurs in a space. Notifications are available in every space of the application and on documents. Users can subscribe to notifications and spaces' managers can subscribe users to notifications.

There are six notifications:

- creation: the user gets an email when some content is created in the space;
- modification: the user receives an email every time the space or its content is edited;
- workflow changed: the user receives an email for each action that happens during a review (start, abandon, document approval, document rejection);

- Approval workflow started: the user receives an email every time an approval workflow is started;
- Comments moderation: the user receives an email when a comment is approved on a site.
- publish: the user receives an email when a document is published in the specified section.

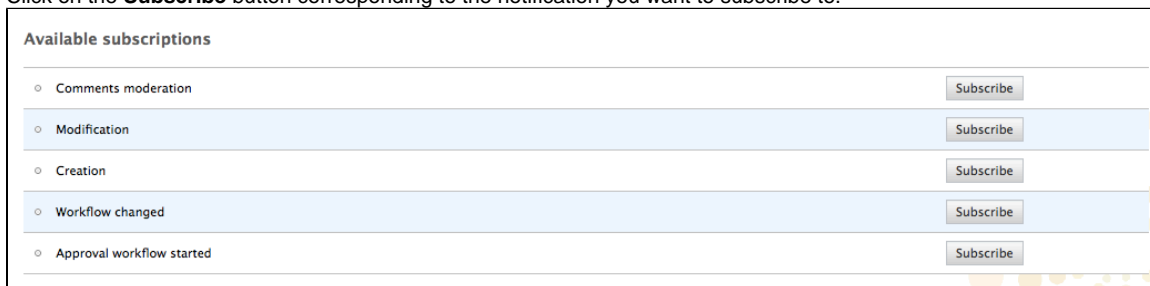
 Publish notification is available in sections only. The other notifications are available in workspaces only.

## Subscribing to notifications

You need to have at least reading rights to subscribe to notifications.

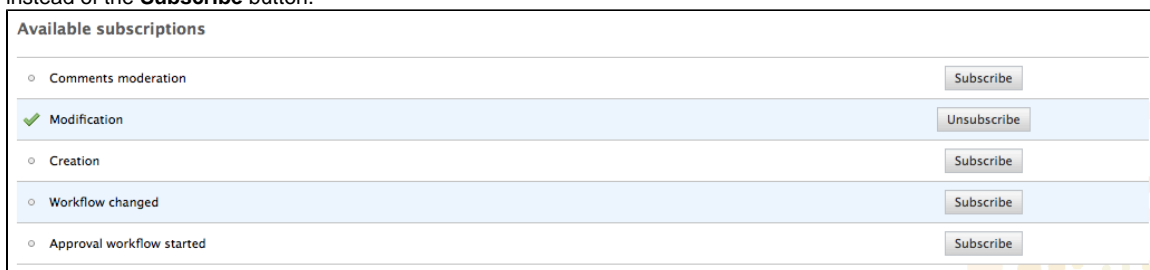
### To subscribe to notifications:

1. In the space, click on the **My Subscriptions** tab.
2. Click on the **Subscribe** button corresponding to the notification you want to subscribe to.



Available subscriptions	
<input type="radio"/> Comments moderation	Subscribe
<input checked="" type="radio"/> Modification	Subscribe
<input type="radio"/> Creation	Subscribe
<input type="radio"/> Workflow changed	Subscribe
<input type="radio"/> Approval workflow started	Subscribe

A green check mark is displayed in front of the notification you have subscribed to and an **Unsubscribe** button is displayed instead of the **Subscribe** button.



Available subscriptions	
<input type="radio"/> Comments moderation	Subscribe
<input checked="" type="radio"/> Modification	Unsubscribe
<input type="radio"/> Creation	Subscribe
<input type="radio"/> Workflow changed	Subscribe
<input type="radio"/> Approval workflow started	Subscribe


If the workspace or section manager subscribed you to a notification, the notification is already checked. The notifications subscribed for a group are indicated in the **My Subscriptions** tab of users as inherited subscriptions.



Inherited subscriptions	
<input checked="" type="checkbox"/>	Modification

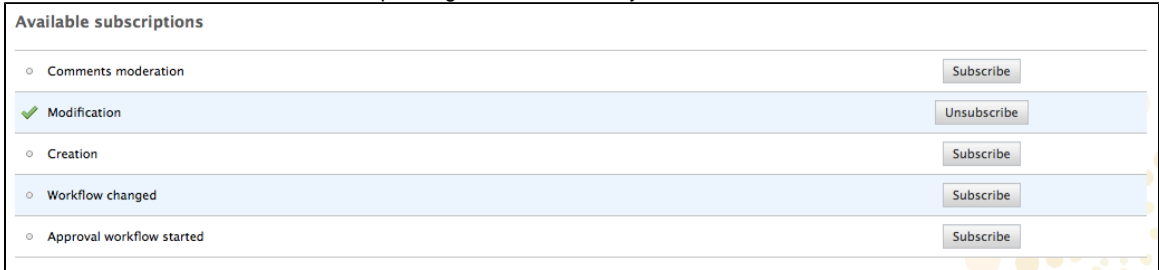
## Unsubscribing from notifications

You need to have at least reading rights to unsubscribe from notifications.

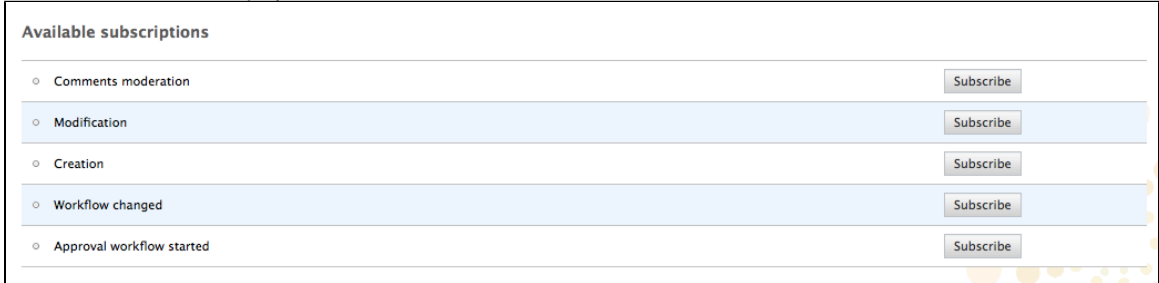
 You cannot unsubscribe from notifications subscribed for your group.

**To unsubscribe from notifications:**

1. In the space, click on the **My Subscriptions** tab.
2. Click on the **Unsubscribe** button corresponding to the notification you want to unsubscribe from.



A button **Subscribe** is displayed instead of the **Unsubscribe** button.



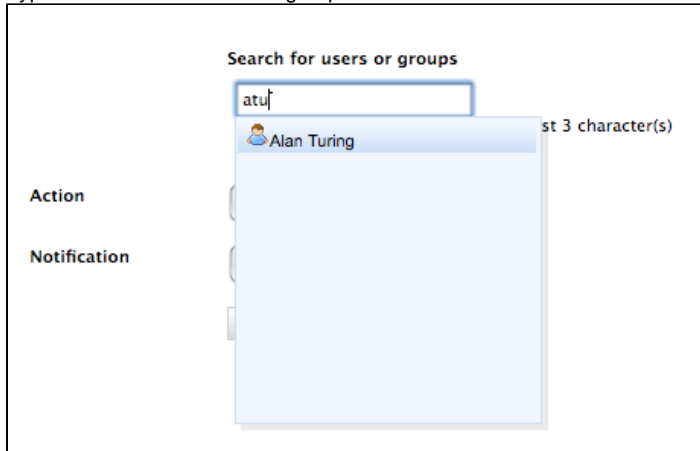
**Managing subscriptions**

Only users with management rights can manage the users' subscriptions.

Users with management rights can see the subscriptions users have signed up to. They can also subscribe users or groups to subscriptions or unsubscribe them.

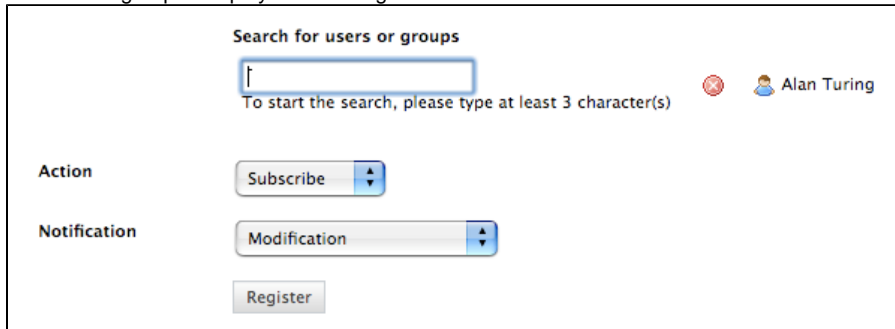
### To manage subscriptions:

1. In the space, click on the **Manage** tab.
2. Click on the **Subscriptions** sub-tab.  
The lists of users subscribed to each notification type is displayed above a subscription form.
3. Type the name of a user or a group in the search box.



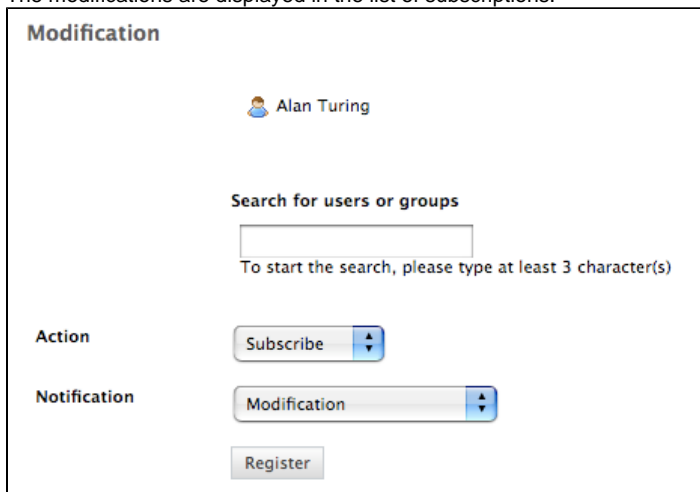
The screenshot shows a search box titled "Search for users or groups" containing the text "atu". A dropdown menu is open below the search box, displaying a user profile icon and the name "Alan Turing". To the right of the dropdown, the text "st 3 character(s)" is visible. Below the search box, there are two labels: "Action" and "Notification".

4. Click on the user or group you want to subscribe to a notification.  
The user or group is displayed on the right of the search box.



The screenshot shows the subscription form with the search box containing "Alan Turing". Below the search box, there is a message: "To start the search, please type at least 3 character(s)". To the right of the search box, there is a red "X" icon and the user profile icon and name "Alan Turing". Below the search box, there are two labels: "Action" and "Notification". The "Action" dropdown is set to "Subscribe" and the "Notification" dropdown is set to "Modification". A "Register" button is located at the bottom of the form.

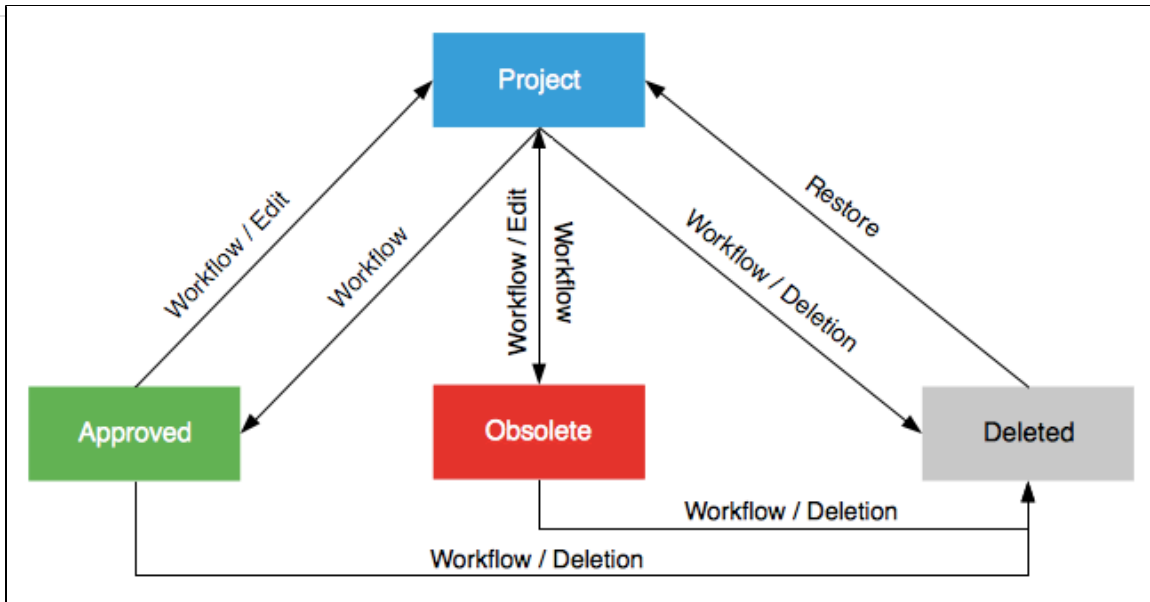
5. Select the action you want to do (**Subscribe** or **Unsubscribe**) and the notification concerned.
6. Click on the **Register** button.  
The modifications are displayed in the list of subscriptions.



The screenshot shows the subscription form with the user "Alan Turing" displayed above the search box. The search box is empty and contains the text "Search for users or groups". Below the search box, there is a message: "To start the search, please type at least 3 character(s)". Below the search box, there are two labels: "Action" and "Notification". The "Action" dropdown is set to "Subscribe" and the "Notification" dropdown is set to "Modification". A "Register" button is located at the bottom of the form.

## Workflows

All the documents evolve according to a defined life cycle. This life cycle is composed of the following states: project, approved, obsolete and deleted. To change the document's life cycle state, you have to submit it to a workflow.



A workflow is a process in which a chain of users is defined to review and approve or reject the document.

When a document is submitted to a workflow, the users who participate to the workflow have an indication of what they need to do on the document. This is the directive. The workflow is automatically ended when all participants have reviewed the document. Then, the document moves into the pre-defined life cycle state.

There are two types of workflow:

- parallel workflow,
- approval workflow.

The difference between the two workflows is the participation order. In a parallel workflow, all users can review the document as soon as the workflow is started. An approval workflow, on the other hand, is an ordered workflow. This means that participants can review the document only when the previous participant in the list has approved the document.

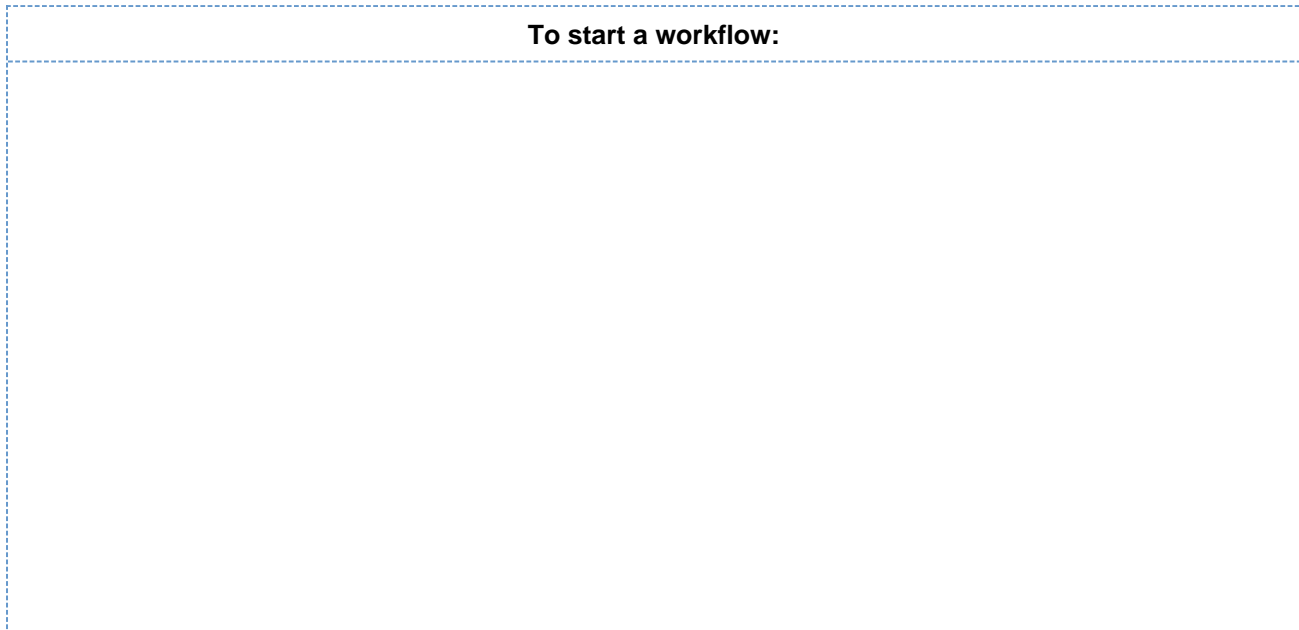
Users who are involved in workflows are alerted by email and can have a synthetic view of all the tasks they have to do on documents in their [dashboard](#). The documents they have to review are listed there.

## Starting a workflow

You need to have writing or management rights to start a workflow.

✔ The process to start a workflow is the same for both workflows.

### To start a workflow:





1. Click on the **Workflow** tab of the document.
2. Fill in the form **Start a workflow**: select the type of workflow you want to start and the output life cycle state.
  - On Docdil DM 19.2.0 to 19.2.1, selecting the "Approved" life cycle state makes the document life cycle state change to "Approved" without version incrementation.

- On Docdil DM 19.2.2, selecting the "Approved" output life cycle state makes the document life cycle change to "Approved" and increments the document's version. You need to select if you want to increment the minor version or major version.

3. Click on the **Start** button.
4. Add users on the workflow.



You are not automatically declared as a participant of the workflow. If you want to participate to the workflow, you need to add yourself as a participant.

5. Click on the **Start the workflow** button to let participants approve or reject the document.

Approved	Name	Directive	Comment	Start date	End date	Due date
<input type="checkbox"/>	John Doe	Check	Can you check it?			May 28, 2010 10:23:00 AM
<input type="checkbox"/>	Alan Turing	Check				Jun 2, 2010 10:23:00 AM
<input type="checkbox"/>	John Smith	Validation	For final approval			Jun 8, 2010 10:24:00 AM

## Managing the workflow participants

When you prepare a workflow, you determine which users will review the document.

Given the workflow type and your participation to the workflow, you can add new participants, change their order of participation, or remove them. To make recurrent participants management easier, you can also use reviewers lists.

### Add participants to a workflow

Only the workflow initiator and administrators can add users on a workflow.

Approval workflow participants can also add new users when they are the current reviewer of the document. As soon as they approved it, they cannot manage the workflow participants anymore.

#### To add a participant:

1. On the **Workflow** tab, in the **Select reviewers** form, type the name of a user or a group. The users and groups corresponding to the letters typed are displayed.

2. Click on the user you want to add on the workflow.
3. Fill in the other fields of the form (see below for details).
4. Click on the **Add** button.

The new participant is added below the current participant.

Workflow						
Approved	Name	Directive	Comment	Start date	End date	Due date
	John Doe	Validation	Can you take a quick look?			17-Jun-2009 10:16:00

You can also load a reviewers list.

### Reviewer selection form parameters

Field	Description
Reviewers	Search and select users or groups.
Right	This field is available since Docdil DM 19.2.2 and enables you to grant reviewers with access rights on the document for the time of the workflow.
Directive	Select in the list what you expect from the reviewer.
Due date	Select the maximum date at which you expect the user to have completed his task on the workflow. When the due date is reached or passed, the task is displayed in red in the reviewer's dashboard.
Comment	Type a comment to give more details to the reviewer about what you expect from him during the workflow, for instance if you want him to pay attention to a specific part of the document.

## Manage reviewers lists

You can save the lists of workflow participants, to reuse them later on the same type of workflow. Indeed, documents often go through the same chains for review or approval.

Workflow participants lists are saved by user and by workflow type. This means that users can only see the lists they saved, not the list other users saved. And that a list can only be used on the same workflow type as the workflow it was saved from.

### Save a list

Any user can save a workflow participants list.

**To save a list of participants:**

- Go on the **Workflow** tab of the document.
- In the **Workflow** section, type a name for the list.

**Workflow**

Doc approval workflow

Approved	Name	Directive	Comment	Start date	End date	Due date
		John Doe	Check	Can you check it?		May 28, 2010 10:23:00 AM

- Click on the **Save the list** button.  
The list is saved and is now available in the **Select reviewers** form.

### Load a list

You can load a list of participants at any time, as long as you have the right to add reviewers on the workflow. You can also combine the use of a list and the manual management of participants (move, add, remove).

**To load a list:**

- Select it in the **Load a list of reviewers** drop down list in the **select reviewers** form.

Summary Edit Files Publish Relations **Workflow** My subscriptions Comments History Preview

Creator (Responsible) John Doe

Workflow type Approval workflow

**Select reviewers**

Load a list of reviewers

Reviewers\* Search for users or groups

To start the search, please type at least 3 character(s)

- Click on the **Load** button.

### Delete a list

You can delete the lists of reviewers you have saved from a workflow.



Type your text







### To delete a participants list:

1. Select it in the **Load a list of reviewers** drop down list in the **select reviewers** form.


2. Click on the **Delete** button.

### Move participants in the workflow

Users who can add participants to a workflow can also change their order on the workflow. Use the  and  arrows to move users up and down in the workflow.

Approved Name	Directive	Comment	Start date	End date	Due date
  John Doe	Check	Can you check it?			May 28, 2010 10:23:00 AM
  Alan Turing	Check				Jun 2, 2010 10:23:00 AM
  John Smith	Validation	For final approval			Jun 8, 2010 10:24:00 AM

### Edit the workflow route

 The edition of the workflow route is available on Docdil DM 19.2.2.

The workflow initiator can edit the workflow route, to edit the due dates and other parameters for instance, especially when the route is based on a participants list.

### To edit a participants list:

- Under the workflow route, click on the **Edit** button.  
The route is displayed in edit mode.

**Workflow**

Approved	Name	Right	Directive	Comment	Start date	End date	Due date
	John Doe	<input type="button" value="Write"/>	<input type="button" value="Check"/>	<input type="text"/>			6/6/11 12:00 PM
	Solen Gutter	<input type="button" value="Write"/>	<input type="button" value="Opinion"/>	<input type="text"/>			6/8/11 12:00 PM
	John Smith	<input type="button" value="Write"/>	<input type="button" value="Validation"/>	<input type="text"/>			6/10/11 12:00 PM

- Change the parameters you want.
- Click on the **Save** button.
- The route is updated with your new parameters.

### Remove participants

Users who can add participants to a workflow can also remove them from the workflow.

### To remove a user from the workflow's participants:

- Click the icon to remove from the workflow.
- Confirm removal on the window that pops up.  
Users is immediately removed from the participants of the workflow.

### Participating to a workflow

Once the workflow has been started, users added on the workflow's roadmap can review the document and approve or reject it.

**Workflow**

Approved	Name	Directive	Comment	Start date	End date	Due date
	John Doe	Check	Solen Gutter : Can you check it?	May 28, 2010 11:22:47 AM	May 28, 2010 11:21:00 AM	Approve Reject
	Alan Turing	Check			Jun 2, 2010 11:21:00 AM	
	John Smith	Validation	For final approval		Jun 8, 2010 11:22:00 AM	

*Add a comment below and click one of the links in the table above. You will find all your tasks in your personal dashboard as well.*

**Comment \***



The workflow initiator can approve or reject the document in behalf of all the workflow's participants.

### Approve a document

In a parallel workflow, participants can approve the document as soon as the workflow is started.

In an approval workflow, participants can approve the document when it's their turn, after the previous participant on the workflow has approved it.

### To approve the document during the workflow:

Click on the **Approve** link displayed on the workflow's roadmap next to your name.

A green tick on the roadmap indicates that you approved the document.

If you are in an approval workflow, the next participant can now review the document and approve or reject it.

💡 Task ended

**Workflow**

Save the list

Approved	Name	Directive	Comment	Start date	End date	Due date
✔	John Doe	Check	Solen Gutter : Can you check it?	May 28, 2010 11:22:47 AM	May 28, 2010 11:33:42 AM	May 28, 2010 11:21:00 AM
🕒	Alan Turing	Check	Solen Gutter :	May 28, 2010 11:33:43 AM		Jun 2, 2010 11:21:00 AM
🕒	John Smith	Validation	For final approval			Jun 8, 2010 11:22:00 AM

*Add a comment below and click one of the links in the table above. You will find all your tasks in your personal dashboard as well.*

**Comment\***

### Reject a document

In a parallel workflow, participants can review the document and reject it as soon as the workflow is started.

In an approval workflow, participants can reject the document when it's their turn, after the previous participant on the workflow has approved it.

### To reject the document during the workflow:

1. Type a comment to indicate why you reject the document (mandatory).
2. Click on the **Reject** link displayed on the workflow's roadmap next to your name.  
A red tick on the roadmap indicates that you rejected the document.  
If you are in an approval workflow, the previous user on the roadmap is automatically inserted after you on the roadmap to check the document. His directive is "Verification after reject".

**Workflow**

Approved	Name	Directive	Comment	Start date	End date	Due date
	John Doe	Check	Solen Gutter : Can you check it?	May 28, 2010 11:22:47 AM	May 28, 2010 11:33:42 AM	May 28, 2010 11:21:00 AM
	Alan Turing	Check	Solen Gutter :	May 28, 2010 11:33:43 AM	May 28, 2010 11:52:13 AM	Jun 2, 2010 11:21:00 AM
	John Doe	Verification after reject	Alan Turing : Commercial section is missing.	May 28, 2010 11:52:13 AM		
	John Smith	Validation	For final approval			Jun 8, 2010 11:22:00 AM

*Add a comment below and click one of the links in the table above. You will find all your tasks in your personal dashboard as well.*

**Comment \***

### End the workflow

The workflow will automatically ends when the last reviewer approves or rejects the document.

In a parallel workflow:

- If all participants have approved the document, its lifecycle state changes into the one chosen when before the workflow was started.
- If a user has rejected the document, the workflow ends but its lifecycle state doesn't change.

In an approval workflow, all users must approve the document. The document will then automatically get into the target lifecycle state.

### Abandoning a workflow

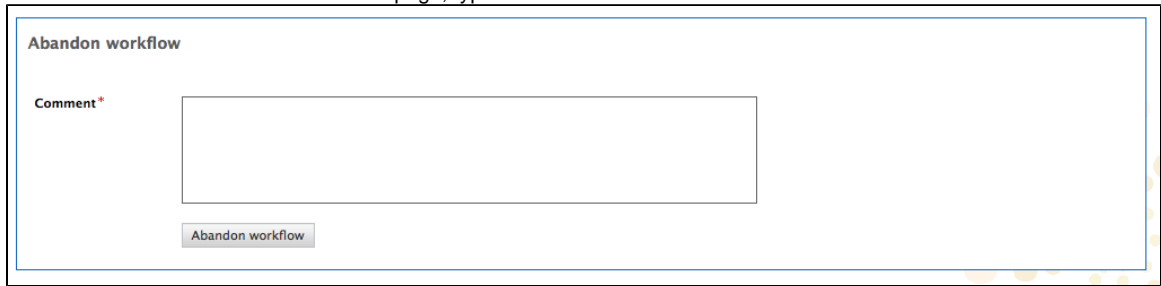
Only the workflow initiator and administrators can abandon a workflow.

Abandoning a workflow means canceling it. When you abandon a workflow, the life cycle state of the document does not change. The modifications made on the document during the workflow are kept.


The abandon process is the same for the two types of workflows.

### To abandon a workflow:

1. Click on the **Workflow** tab of the document.
2. In the **Abandon workflow** section of the page, type a comment in the **Comment** field.



The screenshot shows a form titled "Abandon workflow". On the left side of the form, there is a label "Comment\*" next to a large rectangular text input field. Below the input field, there is a button with the text "Abandon workflow".

 Comment is mandatory to abandon a workflow.

3. Click on the **Abandon workflow** button.  
The workflow is canceled. The life cycle state of the document does not change and the modifications done during the workflow are saved.

## Forums

A forum is a discussion space in which users can talk together. A forum is organized around different topics, in which users can add comments. Topics and comments are displayed in threads.

As for workspaces and sections, the access to a forum is defined by access rights. Forum access rights are the same as workspace access rights. However, in the case of a [moderated topic](#), some users are declared "moderators" and are in charge of the approval of the topic content.

Forum creation and edition are available for users with 'Write' and 'Manage' rights.

Users with 'Manage' rights can also manage the forum like a workspace, ie [give users access rights](#), set [alerts](#) and manage the forum's [trash](#).

### Create a forum

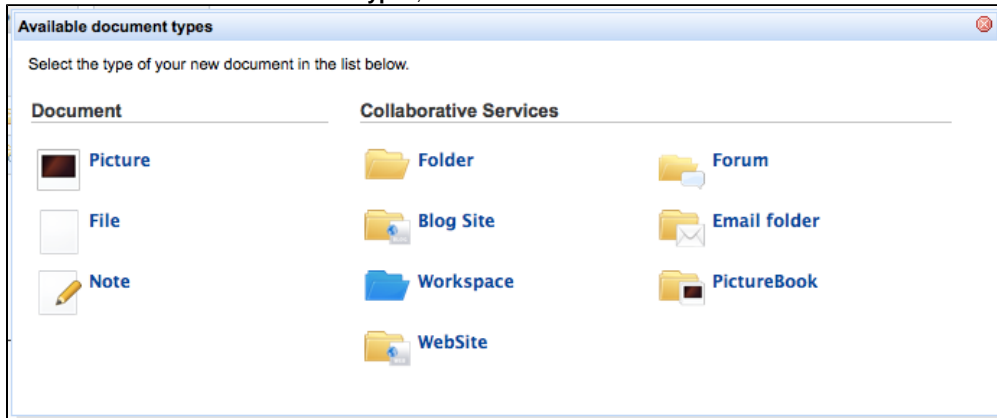
You need 'Write' or 'Manage' rights to be able to create a forum.

You can create forums only in workspaces.



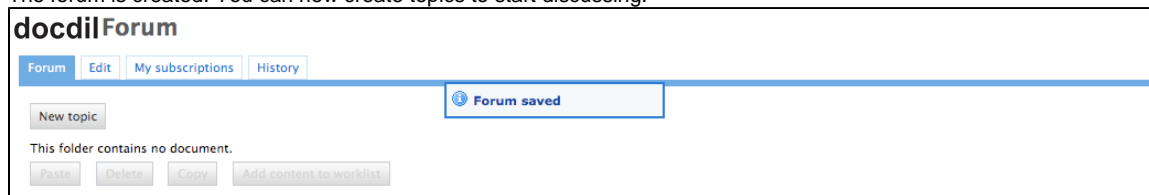
### To create a forum:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.



3. Fill in the document's creation form.
4. Click on the **Create** button.

The forum is created. You can now create topics to start discussing.



### Edit a forum

You need 'Write' or 'Manage' rights to edit a forum.

When you edit a forum, you modify its title and its description.


### To edit a forum:

1. On the forum, click on the **Edit** tab.
2. Modify the title or the description of the forum. You can also add a comment explaining what you edited on the forum.
3. Click on the **Save** button.  
The modifications are saved and the **Forum** tab is displayed.

### Manage topics

A topic can be moderated, that is to say that the content needs to be approved in order to be available to forum readers.

- In an topic without moderation, the content is available without preliminary approval.
- In a moderated topic, the content needs to be approved by a moderator to be visible for users.

 You are automatically added as a moderator if you create a moderated topic.

### Add a topic

### To add a new topic in a forum:

1. In the **Forum** tab of the forum, click on the **New Topic** button.
2. Type the topic's title and optionally add a description.
3. Select if the topic is moderated or not. If yes, search and select the moderators.
4. Click on the **Create** button.

The **Topic** tab of the topic is displayed, with the form to add a first comment on the topic.

The list of the topics available in a forum is displayed in a table in the **Forum** tab.

Topic	Last message	Nb. of published posts	Nb. of pending posts	Moderation
docdil features		0	0	No

### Moderate a topic

When a user creates a topic, he or she decides if the topic is moderated or not. Moderation is a process that makes comments available to moderators only when they are created, until they approve or reject the pending comments. Approval is thus mandatory to make comments available for other forum users.

When a user creates a moderated topic, he appoints users to manage comments on the topic. Only these moderators can approve or reject pending comments.

Moderators can see if there are comments pending in the forum tab. The number of comments waiting for approval is indicated for each topic of the forum.

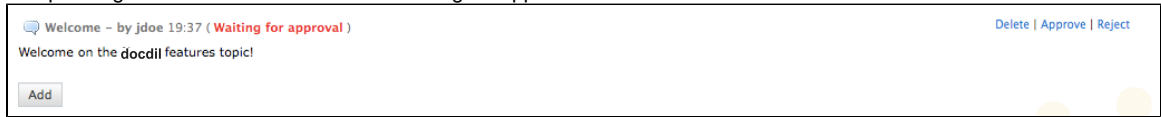
Topic	Last message	Nb. of published posts	Nb. of pending posts	Moderation
docdil features		0	1	Yes

### Approve a comment

Approving a comment means to publish it in the thread and make it available for all forum users.

### To approve a comment:

1. Open the topic that has pending comments.  
The pending comments have the status "Waiting for approval".



2. Click on the **Approve** link in the top right corner of the pending comment.  
The comment's status is "Published". It is now available to all forum readers.

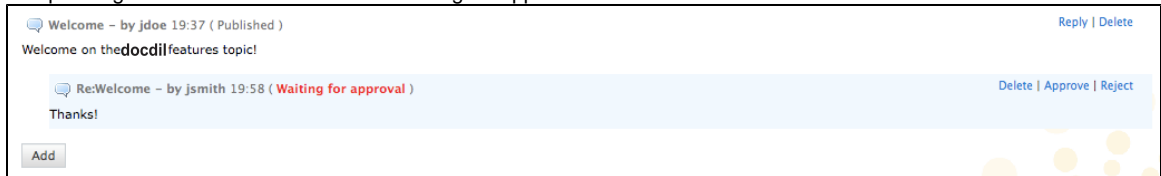


### Reject a comment

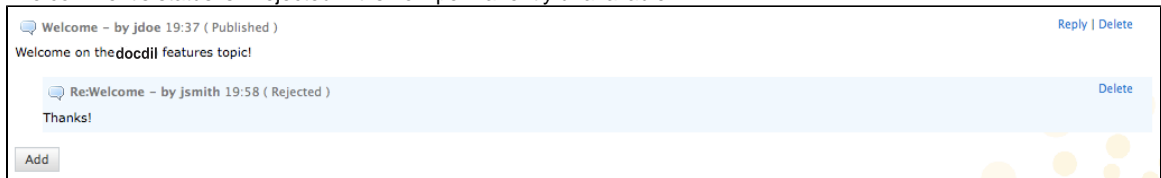
Rejecting a comment means that you make the comment permanently unavailable for forum users.

### To reject a comment:

1. Open the topic that has pending comments.  
The pending comments have the status "Waiting for approval".



2. Click on the **Reject** link in the top right corner of the pending comment.  
The comment's status is "Rejected". It is now permanently unavailable.



### Delete a comment

Only the comment's author and the topic moderators can delete comments.

### To delete a comment in a topic:

1. Open the topic.
2. Click on the **Delete** link located in the top right corner of the comment to delete.  
The comment is immediately and permanently deleted.

### Delete a topic

Deleting a topic means deleting its content as well.

When you delete a topic, it is definitively erased from the application.

### To delete a topic:

1. In the **Forum** tab of the forum, select the topic you want to delete by checking the corresponding box.
2. Click on the **Delete** button.  
A confirmation window pops up.
3. Click on the **OK** button.  
The topic is moved to the forum's trash. Users can then [restore the topic](#) into the forum or [erase](#) the same way as a document in a workspace.

### Participate to a topic

To participate to a topic, you can add comments in it. The other users will be able to answer your comment.


## Add a comment to a topic

You must have at least writing rights to add comments on a topic.

You can attach a file to your comment, that users will be able to consult. The attached file of a comment cannot be modified or removed afterwards.

### To add a comment to a topic:

1. Click on the **Topic** tab of the topic.

 If the topic is empty, the form to add a comment is automatically displayed in the Topic tab.

2. Click on the **Add** button to display the form to add a comment.

**Add a comment**

**Title** \*

**Comment** \*

**Attach a file**

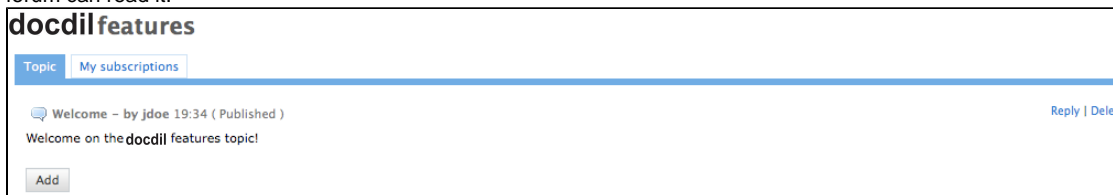
None

Upload

3. Type the subject and the content of your comment.
4. Attach a file to your comment (this is optional).
5. Click on the **Add** button.

The comment is displayed in the **Topic** tab.

- If the topic is not moderated, the comment has the status "Published" and all the users with access rights to the forum can read it.



- If the topic is moderated, the comment has the status "Waiting for approval" and is not available in the topic. A moderator is notified that you added a comment and he or she needs to approve it so that the comment becomes available for all forum users.



If you are the moderator of the topic, your comment is automatically published.

## Reply to a comment

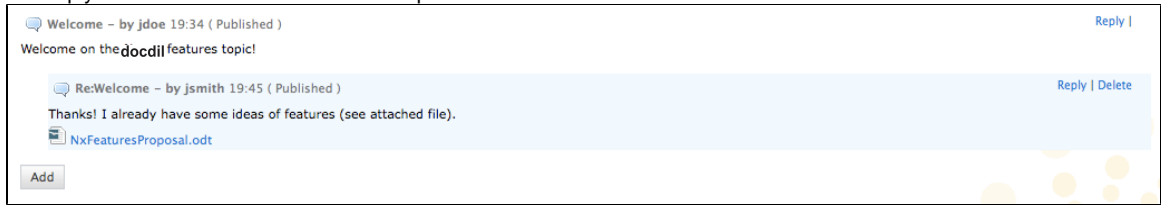
You must have at least writing rights to reply to comments in a topic.

When a comment has been added, you can reply to it. The answer is inserted right after the comment it replies to.

### To reply to a comment:

1. In the **Topic** tab, click on the **Reply** link displayed top right corner of the comment you want to reply to. The reply form is displayed under the comment.
2. Fill in the form.
3. Click on the **Add** button.

The reply is inserted **after** the comment it replies to.



- If the topic is not moderated, the reply has the status "Published" and all the users with access rights to the forum can read it.
  - If the topic is moderated, the reply has the status "Waiting for approval" and is not available in the topic. A moderator is notified that you added a reply and he or she needs to approve it so that the reply is available for all forum users.
- If you are the moderator of the topic, your reply is automatically published.

## Pictures

Pictures are usually created in a picture book, a folder adapted to pictures, that enables you to view your pictures in a slideshow, for instance. But they can be used in regular folders and in workspaces directly.

In Docdil DM, pictures (created in a picture book, in a workspace or in a folder) have some specific features available:

- rotation
- picture specific metadata extraction
- different size presentation

In this section, we will see how to:

- [Manage picture books](#)
  - [Create a picture book](#)
  - [Edit a picture book](#)
  - [View the content of a picture book](#)
- [Manage pictures](#)

### Manage picture books

Picture books are folders adapted to hold only pictures. As so, you have some specific parameters that you need to fill in when you create a picture book.

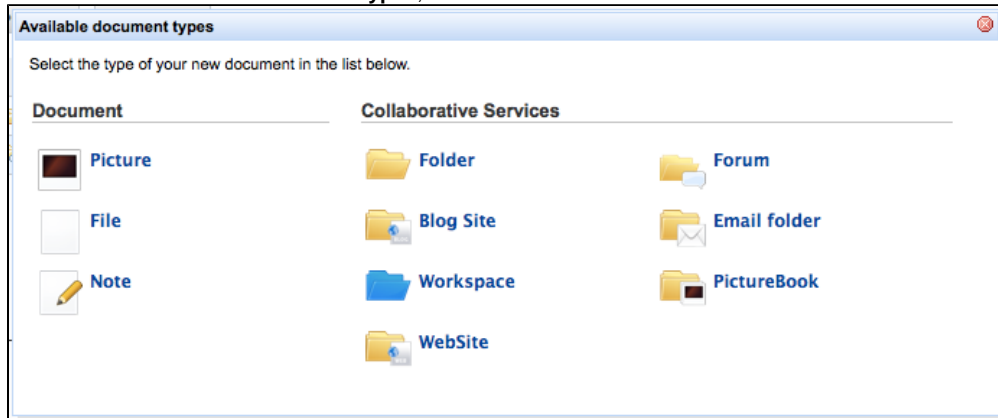
A picture book can only hold pictures and other picture books.

#### Create a picture book

You need to have at least Write right to be able to create a picture book.

### To create a picture book:

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.



3. Fill in the document's creation form.
4. Click on the **Create** button.

### Picture book creation parameters

Field	Description
Title	Name of the picture book
Description	What the picture book is about
Slideshow duration	Time in seconds during which each picture of the pictures in the book will be displayed during the slideshow
Views	<p>Different views and formats available for the pictures available in the picture book.</p> <p>Default views available are:</p> <ul style="list-style-type: none"> <li>• Thumbnail: view used for the default picture book content view,</li> <li>• Medium: intermediate size picture,</li> <li>• Original: original size picture,</li> <li>• OriginalJpeg: original size picture in .jpg format.</li> </ul>

### Edit a picture book

You need to have at least Write right to edit a picture book.

When you edit a picture book, you edit some of its properties: title, description and slideshow duration. You cannot edit the picture views available in the picture book.

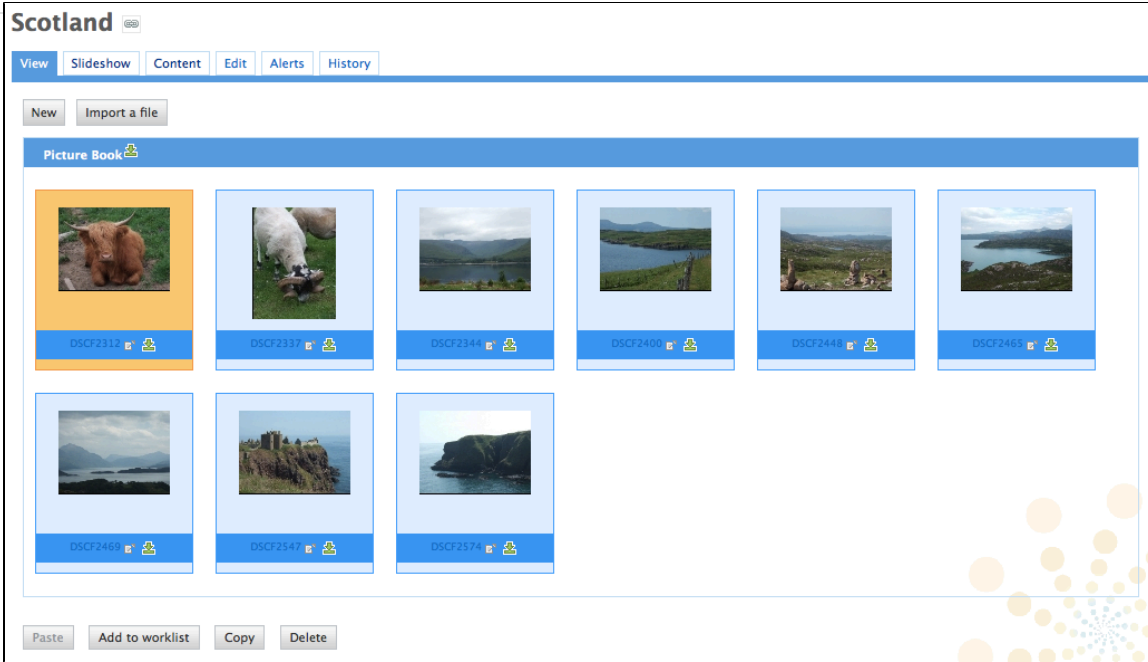
### To edit a picture book:

1. Click on the **Edit** tab of the picture book.
  2. Edit the edition form's fields.
  3. Optionally type a comment to keep track of why you edited the picture book.
  4. Click on the **Save** button.
- Modifications are saved and the fact that you edited the picture book is tracked in **History** tab.

### View the content of a picture book

Beside the **Content** tab that enable the same features as in a workspace or a folder (selection of documents), a picture book has a **View** tab displays the book's content as thumbnails. It is the picture book's default tab. However, the regular **Content** tab used on all folderish content is available on picture book as well, to make it easy to have a synthetic view of the pictures author, versions, ect.

In the **View** tab of the picture book, click once on a picture to select it (keep CTRL touch pressed if you want to select several pictures) and click twice on it to consult it. Selected pictures are displayed on an orange background.



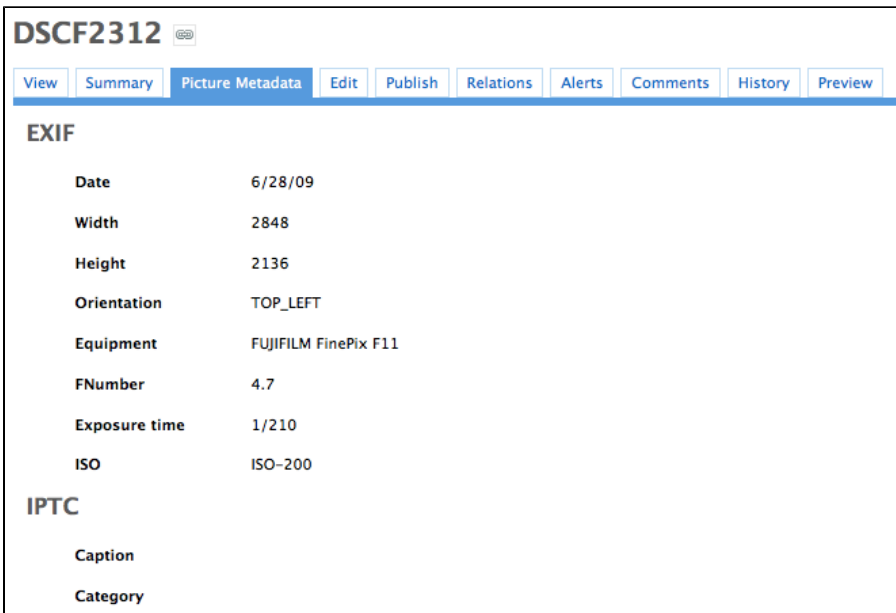
A **Slideshow** tab is also available on picture books, in which the pictures are displayed in a slideshow.

## Manage pictures


Pictures can be created in picture book, in folders and in workspaces. You can add pictures using all document creation means:

- **New** button
- **Import a file** button
- **Drag&Drop**.

When pictures are created, the EXIF and IPTC metadata of the pictures are automatically extracted. You can consult them in the **Picture metadata** tab. EXIF and IPTC metadata are not editable.




When they are created, pictures are displayed in the **View** tab, that enables some picture management specific actions. Should the picture be wrongly oriented, you can rotate it using the right and left rotation buttons available on this tab. It is in this tab that you can see the different sizes available for the picture (sizes available are defined for the whole picture book) and download it in the format you need. Default size is medium size.

**DSCF2312** 

View | Summary | Picture Metadata | Edit | Publish | Relations | Alerts | Comments | History | Preview

Rotate Left | Rotate Right | Download

Medium  Original  Thumbnail  OriginalJpeg

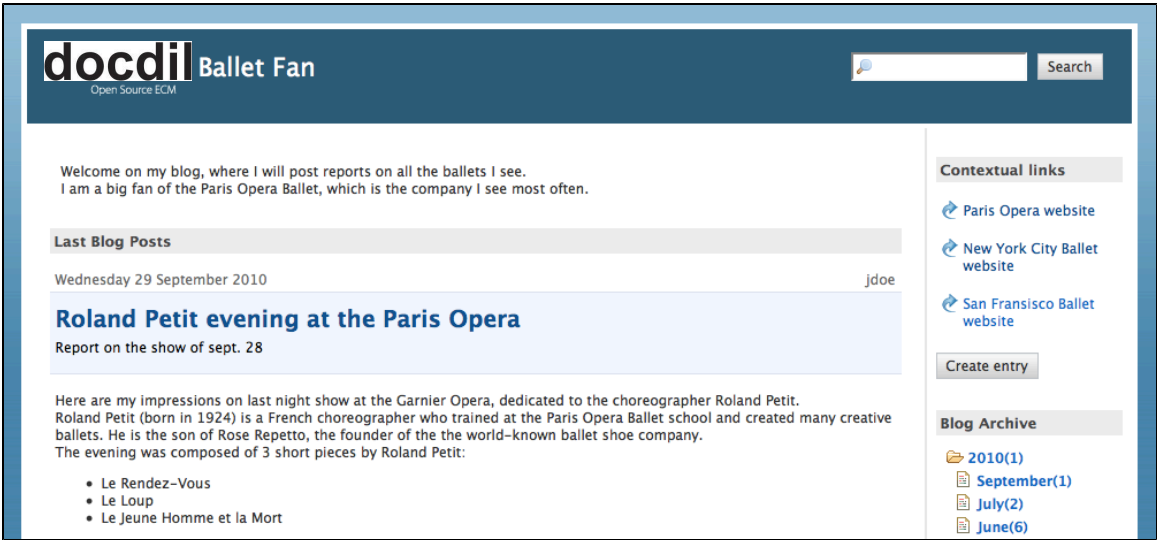


Whatever the folder they have been created in, their behaviour and the actions available are the same: you will be able to [preview](#) and [annotate](#) them, [link](#) them to other documents, [tag](#) them, [publish](#) them and subscribe to [email alerts](#). Note that workflow is not available on pictures.

## Websites and blogs

[Websites](#) and [Blogs](#) are collaborative documents that are web publishing oriented. As so, they have a second interface that makes it easy to display the documents of a workspace to the public. These specific presentations are built using Docdil WebEngine.

Websites and blogs have in common some specific behaviours, like the fact that they have some specific access rights and that comments can be moderated.



**docdil** Ballet Fan  
Open Source ECM

Welcome on my blog, where I will post reports on all the ballets I see.  
I am a big fan of the Paris Opera Ballet, which is the company I see most often.

**Last Blog Posts**

Wednesday 29 September 2010 jdoe

**Roland Petit evening at the Paris Opera**  
Report on the show of sept. 28

Here are my impressions on last night show at the Garnier Opera, dedicated to the choreographer Roland Petit.  
Roland Petit (born in 1924) is a French choreographer who trained at the Paris Opera Ballet school and created many creative ballets. He is the son of Rose Repetto, the founder of the the world-known ballet shoe company.  
The evening was composed of 3 short pieces by Roland Petit:

- Le Rendez-Vous
- Le Loup
- Le Jeune Homme et la Mort

**Contextual links**

- Paris Opera website
- New York City Ballet website
- San Francisco Ballet website

Create entry

**Blog Archive**

- 2010(1)
  - September(1)
  - July(2)
  - June(6)

## Blogs

Along with websites, Docdil DM includes blogs. Like websites, blogs are documents that make it easy to display your comments and documents, in reverse-chronological order. And like websites, they are available via a WebEngine interface, that takes into account all the characteristics of a blog.



Blogs are accessible by a URL formed like `http://server:8080/Docdil/site/blogs/blog-name`. A shortcut is also available from the top right corner of the blog's "Summary" tab in Docdil DM interface (blog back-office).

	Title	Modified	Author	Version State
<input type="checkbox"/>	<a href="#">New York City Ballet website</a>	9/29/10 4:11 PM	John Doe	Project
<input type="checkbox"/>	<a href="#">Paris Opera website</a>	9/29/10 4:10 PM	John Doe	Project
<input type="checkbox"/>	<a href="#">Roland Petit evening at the Paris Opera</a>	9/29/10 4:07 PM	John Doe	Project

In this section, we will see how to:

- Create a blog
- Add content to your blog
  - Add a blog post
  - Add a contextual link

### Create a blog

Blogs can be created in workspaces only. You just need to have "Write" right to be able to create a new blog.

**To create a blog:**

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.

**Available document types**

Select the type of your new document in the list below.

Document	Collaborative Services	
<b>Picture</b>	<b>Folder</b>	<b>Forum</b>
<b>File</b>	<b>Blog Site</b>	<b>Email folder</b>
<b>Note</b>	<b>Workspace</b>	<b>PictureBook</b>
	<b>WebSite</b>	

3. Fill in the document's creation form.
4. Click on the **Create** button.

### Blog parameters

Field	Description
Blog name	Type the name of your blog. This name will be displayed on top of all blog's pages.
Baseline	Type a brief description or catchphrase for your blog. This baseline will be displayed on all pages below the blog's name.
Email	Type the webmaster's email address. This address will be used for the contact link.
Logo	Default logo is Docdil's. You can upload the logo of your choice to replace Docdil's logo with one adapted to your blog's subject.
Welcome text	Type a text that will be displayed on the home page of your blog.
Welcome Animation/Image	You can add a SWF animation or a picture on your blog's home page.
Captcha	Check the box your you want users to type letters or digits from a distorted image displayed on forms, to secure content creation on your blog.
Moderation Type	Select if comments posted on your blog should be should be approved to become visible by users (beforehand moderation) or if they are published immediately (afterwards moderation).

### Add content to your blog

In a blog, you can create blog posts and contextual links.

#### Add a blog post

Blog posts are all created at the root of the blog. They are then automatically sorted by creation date in the left menu of the blog.

You need "Write" permission to be able to create blog posts. You can create them from the blog's back-office (DM's interface) or from the blog's interface.

#### To create a blog post

1. From the blog's homepage, click on the button **Create entry**.
2. Fill in the creation form:
  - Title: type the name of your post.
  - Description: type a text describing what the post is about.
  - Content: type the content of your post in the editor.
3. Click on the button **Save**  
The post is immediately created and displayed. It is also displayed in the last blog posts.

#### Add a contextual link

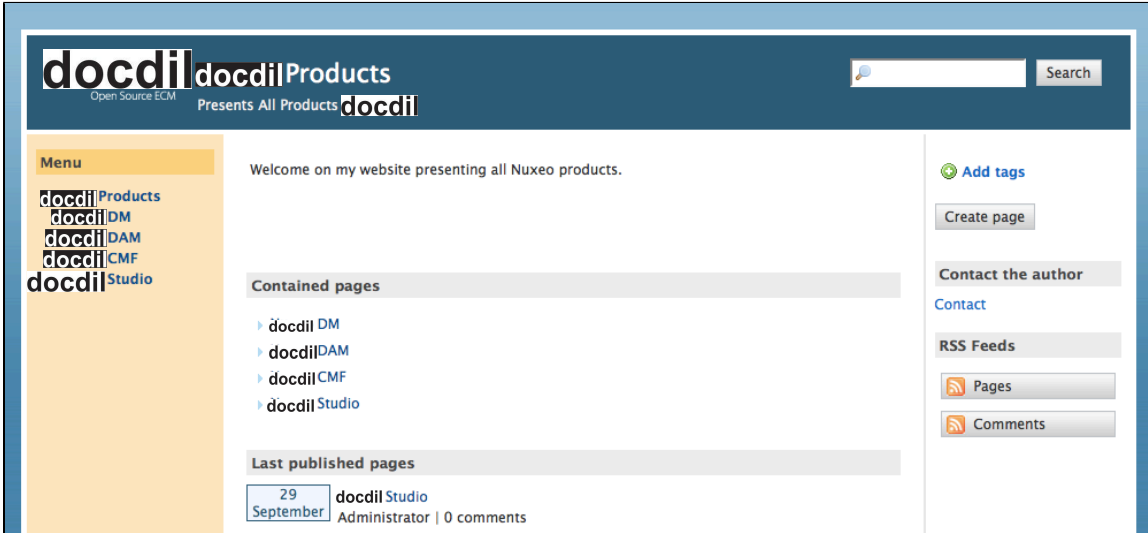
Contextual links are links displayed on the blog's home page. They can be added from the blog's back-office only.

#### To add a contextual link:

1. On the **Content** tab of the blog from the back-office interface, click on the **New** button.
2. On the modal window displayed, click on **Contextual link**.
3. Fill in the creation form:
  - Title: type the text on which the user will click to open the link.
  - Description: type an optional text describing why you add this link. The description is displayed on the blog's interface.
  - Link: type the URL of the link.
4. Click on the button **Create**.  
The link is created and its **Summary** tab is displayed.  
In the blog's interface, the link is displayed in the right column.

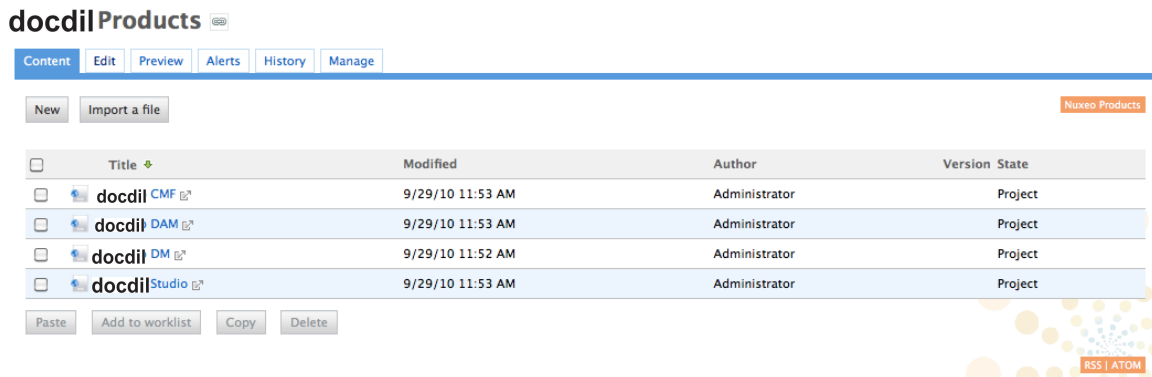
## Websites

Websites are documents in which you can publish webpages and contextual links. To make it even easier to display your documents, they have a specific presentation, rendered using Docdil WebEngine.



The creation of a website takes place in workspaces, in the regular Docdil DM interface. Content creation, edition and commenting will preferably take place in Docdil WebEngine interface. Website management will however take place in Docdil DM's interface, which is considered as the website's back-office.

Websites are accessible by a URL formed like `http://server:8080/Docdil/site/sites/site-name`. A shortcut is also available from the top right corner of the website's "Summary" tab in Docdil DM interface (website back-office).



In this section, we will see how to:

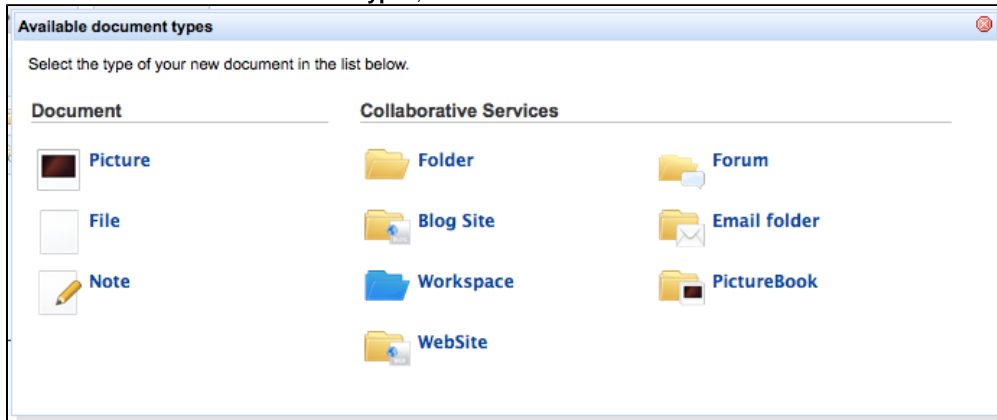
- Create a website
- Add content to a website
  - Add a webpage
  - Add a contextual link
- Manage the access to the website

### Create a website

Websites can be created in workspaces only. You just need to have "Write" right to be able to create a new website.

**To create a website:**

1. In the **Content** tab of the workspace, click on the **New Document** button.
2. On the window **Available document types**, click on the desired document.



3. Fill in the document's creation form.
4. Click on the **Create** button.

**Website parameters**

Field	Description
Site name	Type the name of your website. This name will be displayed on top of all website's pages.
Baseline	Type a brief description or catchphrase for your website. This baseline will be displayed on all webpages below the site's name.
Email	Type the webmaster's email address. This address will be used for the contact link.
Logo	Default logo is Docdil's. You can upload the logo of your choice to replace Docdil's logo with one adapted to your website's subject.
Welcome Text	Type a text that will be displayed on the home page of your website.
Welcome Animation/Image	You can add a swf animation or a picture on your website's home page.
Captcha	Check the box your you want users to type letters or digits from a distorted image displayed on forms, to secure content creation on your website.
Moderation Type	Select if comments posted on your website should be should be approved to be visible by user (beforehand moderation) or if they are published immediately (afterwards moderation).

**Add content to a website**

In a website, you can create pages and contextual links.

**Add a webpage**

Webpages can be created at the root of a website or in another page. You can create pages from Docdil DM's interface (which would be considered as the back-office of the website) or from the website interface.

### To create a webpage:

1. In the website interface, click on the button **Create page** located in the right column.
2. Fill in the creation form:
  - Title: give your page a title
  - Description: type an optional text describing what the page is about.
  - Select the format used to present the content of the page and type the text in the editor displayed below.
  - Display this page in the webview menu: Select if you want the page to be displayed in the website menu.
3. Click on the button **Save**.  
The page is created and displayed.

### Add a contextual link

Contextual links are links that are displayed from a webpage, in the right column of the website. Contextual links can only be created from the website's back-office, at the root of the application.

### To create a contextual link:

1. On the **Content** tab of the website from the back-office interface, click on the **New** button.
2. On the modal window displayed, click on **Contextual link**.
3. Fill in the creation form:
  - Title: type the text on which the user will click to open the link.
  - Description: type an optional text describing why you add this link. The description is displayed on the website's interface.
  - Link: type the URL of the link.
4. Click on the button **Create**.  
The link is created and its **Summary** tab is displayed.  
In the website interface, the link is displayed in the right column.

### Manage the access to the website

In a website, access rights can be managed on the website itself and on the webpages. The steps to grant or refuse access rights are the same as on a workspace or a folder (see [Manage access rights](#)).

However, websites have specific access rights:

- Comment
- Moderate

In a website, users with "Read" write cannot comment on pages unless they are explicitly give the right to comment.

If beforehand moderation is applied to the website, then users with "moderate" rights will have to approve comments so that they can be viewed by other users.



Users with "Write" permission can comment on pages. Comments are still submitted to moderation.  
Users with "Manage everything" permission are automatically moderators.

## Email folders

Email folders are folders in which you can fetch emails to store and share them in your Docdil DM application.

The email folder is not intended to be a webmail. It will fetch the unread emails on your email server when you manually trigger the fetch from Docdil DM interface.

When emails are imported in Docdil DM, some metadata are automatically extracted from the email:

- Subject
- Sender
- Sending date
- Recipients
- CC Recipients
- Text: content of the email
- Attachments

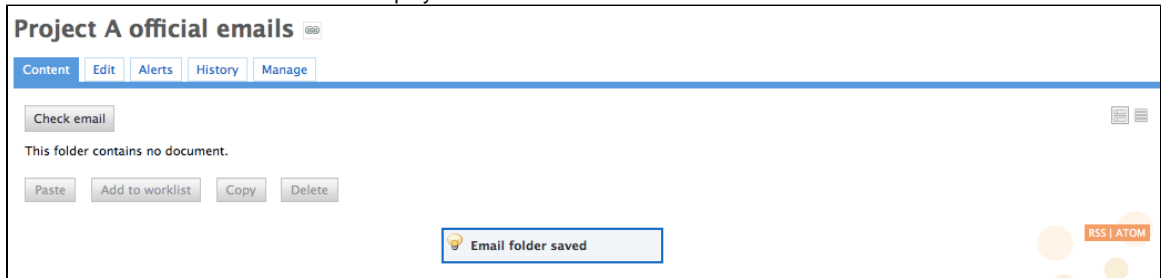


The emails imported in the email folder cannot be modified in Docdil DM.

### Create an email folder

### To create an email folder

1. In a workspace, click on the **New** button.
2. In the modal window displayed, click on **Email folder**  
The email folder creation form is displayed.
3. Fill in the creation form (see parameters below) and click on the **OK** button.  
The **Content** tab of the email folder is displayed.



You can now fetch emails.

### Email folder parameters

Field	Description
Title	Name of your email folder
Email	Email address of the account from which the emails will be fetched.
Password	Password of the email account from which the emails will be fetched.
Protocol	Select the receive protocol used for the email account.
Host	Type the name of the host of the email account.
Port	Type the port number. Default value is 993, which should be ok in most cases. Check with your administrator if this value should be changed.
Socket factory fallback	Default value is set to "Yes". This parameter sets the behaviour in case the socket used to connect Docdil DM server to the email server fails to be created using the implemented socket factory.
Socket factory port	Port used to connect Docdil DM server to the email server. Default value is set to 993.
Start TLS (IMAP)	Default value is set to "Yes" to secure exchanges with the email server.
SSL protocols (IMAP)	Default value is "SSL". You can add other protocols, separated by whitespace.
Limit of new fetched emails	Indicate the maximum number of emails to be fetched at the same time.

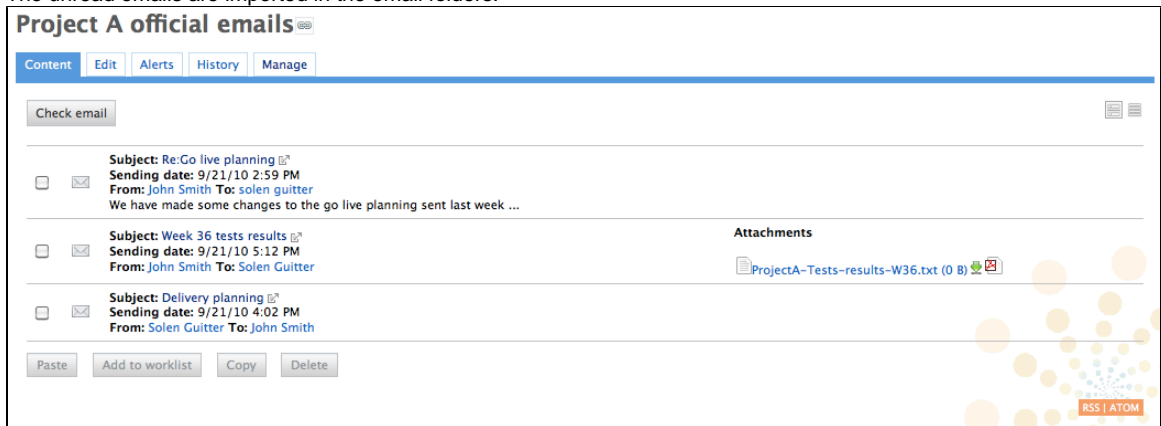
The actions available on an email folder are:

- Edit the folder (see parameters above),
- Subscribe to alerts,
- [Manage the access](#) to the folder,
- [Manage the trash](#) of the folder.

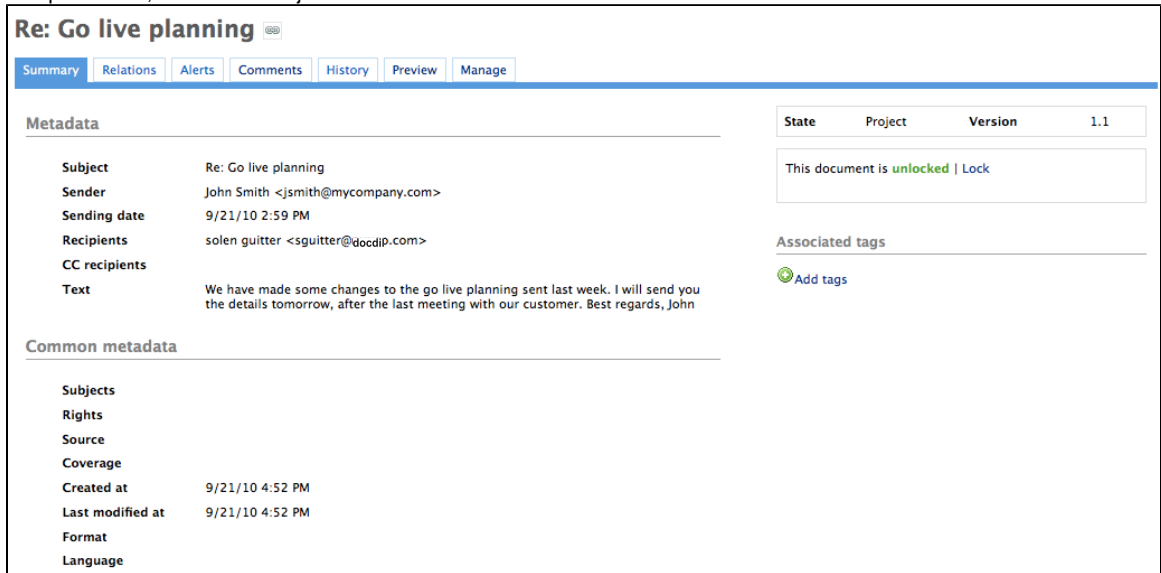
### Fetch emails

### To fetch emails

1. In your email client, mark the emails you want to fetch as unread.
2. In Docdil DM, open the email folder.  
The **Content** tab is displayed.
3. Click on the **Check email** button.  
The unread emails are imported in the email folders.



4. To open a mail, click on its subject.



Emails cannot be edited, but you can [comment](#) and [annotate](#) them, [link](#) them to other documents and subscribe to [alerts](#).

## Using Workspace Templates

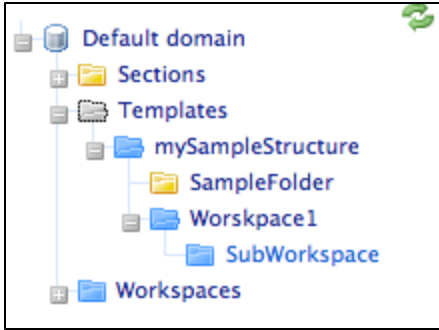
### Using Workspace Templates

Templates are the easiest way to automate the creation of workspace tree structures. This is useful in many cases, for example when:

- you have many workspaces to create and want them to follow a certain structure of Folders, Files, or any type of documents (Forum, Blog, etc).
- you want to keep a consistency among different workspaces that users will create. For example, you may want each team's workspace to have a mail folder, a "projects" workspace, etc.

Templates can be created by:

1. clicking on the left panel of Docdil DM on "Templates":



2. From there, you can create a new Template containing any type of document, and even files, with the tree structure you want.
3. Once a new Template has been created, you can create many workspaces from this template.

**Templates and User Rights Management**

- When you set access rights on the 1st-level workspace of a template - here mySampleStructure-, it will be inherited in the new workspaces. For example, a user who is not allowed to read "mySampleStructure" will not be able to see it when creating a workspace.
  - When you set access rights on the content of a workspace in a template, it won't be inherited in the new workspaces. For example, a user who can't read a folder like "SampleFolder" in a workspace but have reading access on the 1st-level workspace, will be allowed to see "SampleFolder"
- In a few words, don't try to manage workspaces' access rights with Templates (this can be done other ways, like using Studio c onfiguration tool).

## Exporting documents

Users can export documents. It is possible to export:

- one document at a time,
- several documents,
- an entire workspace, folder, section.

There are several types of export:

- the zip export enables users to get a zipped folder with the documents' main attachment (.pdf, .doc files).
- the XML export is a low level export that enables users to get a folder for each exported document that contains:
  - a document.xml file holding the document's metadata and various information such as the applied access rights
  - a .blob file that holds the binary content of the document. This blob is referenced in the document.xml file.

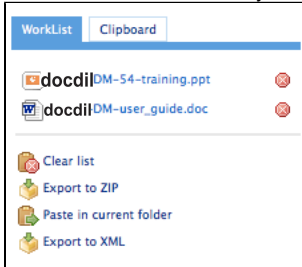
### Using the ZIP export

The zip export can be only be done from the worklist.

**To export documents in a zipped folder:**

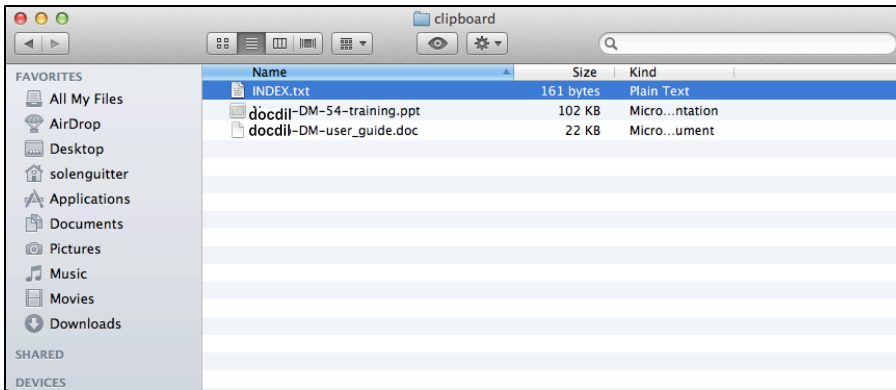
1. Check the box that corresponds to the document to export to select it.
2. Click on the **Add to worklist** button.

The document is added to your worklist, in the left part of the screen.



3. Optionally go in other folders and add other documents to your worklist.
4. In the worklist, click on the **Export to ZIP** link.  
Save the "Clipboard.zip" folder.  
When you unzip it, you get the document's attachments and an INDEX.txt file that summarizes the content of the export.



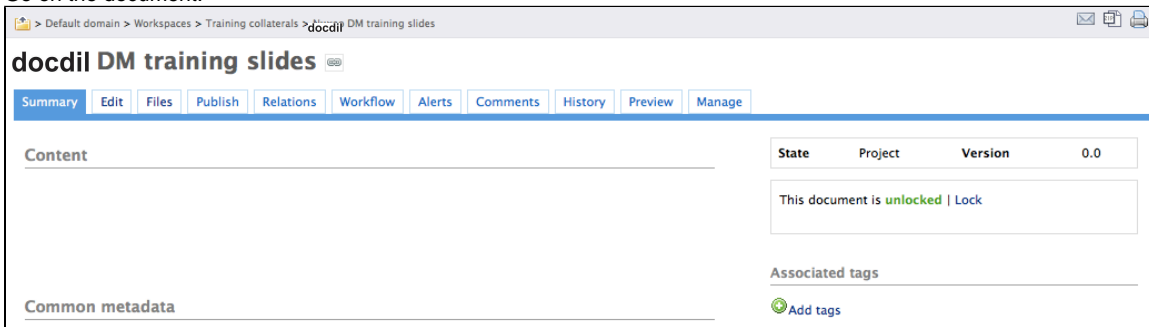



## Using the XML export

The XML export can be done from the worklist and from the documents.

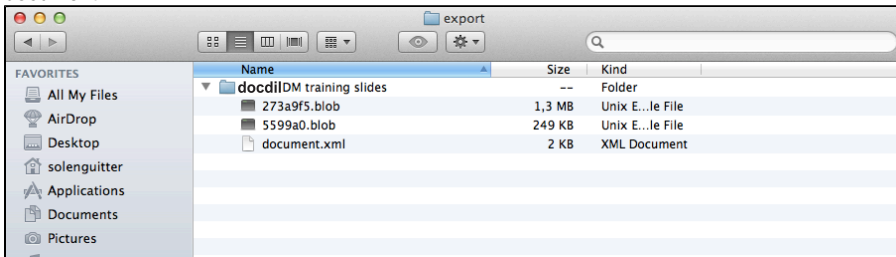
### To use the XML export on a single document:

1. Go on the document.



2. Click on the icon  displayed below the search box.
3. Save the "Export.zip" folder.

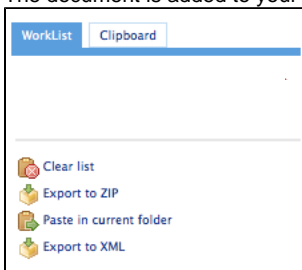
When you unzip it, you get a folder named from the document, that contains a document.xml file and .blob for each attachment of the document.



### To use the XML export on several documents:

1. Check the box that corresponds to the document(s) to export to select it.
2. Click on the **Add to worklist** button.

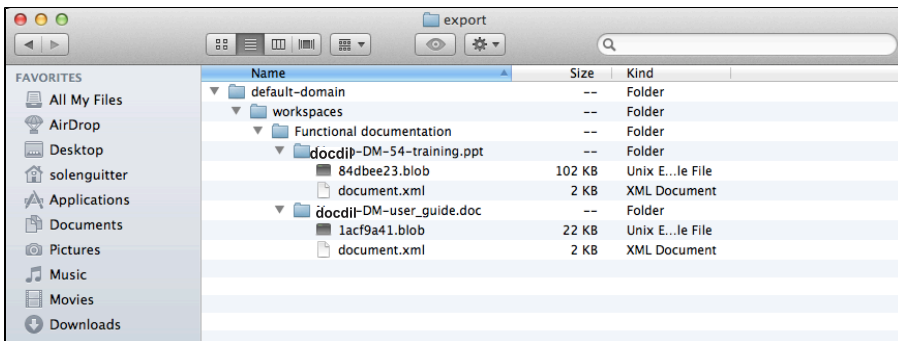
The document is added to your worklist, in the left part of the screen.



3. Optionally go in other folders and add other documents to your worklist.
4. In the worklist, click on the **Export to XML** link.

Save the "Export.zip" folder.

When you unzip it, you get a folder structure that reproduces the Docdil DM tree to the document.



## Working in sections

When a document is finished and ready for distribution, you must publish it in a section. Sections are spaces dedicated to the distribution of documents to a wider audience.

Sections are spaces that are managed like workspaces. Like for workspaces, there is no section that is automatically created by default, except for the sections root. You are free to organize your section the way it fits your needs or your project the best. The section tree is completely independent from workspaces. Their structure is not linked. Still, you can guide users as to where they should publish documents from a specific workspace using the [publication targets](#).

As in workspaces, the access to sections is determined by [access rights](#).

The main difference with workspaces is the fact that documents can't be edited in sections. The only actions available on published documents are:

- [relations actions](#),
- [annotation actions](#),
- [alerts](#).

Publishing a document means publishing the version of the document as it is at the time of publication. If you modify the document in the workspace once published, it is not modified in the section. Published documents are for consultation only and cannot be modified. If you want to modify a published document, you must modify it in the workspace and then publish the modified version of the document.

When you want to publish a document, you need to submit it to publishing. When the document is submitted to publication, the section's managers can approve the publication submission, that is to say publish the document, or reject it. In that last case, the document is not available in the section. However, it is still available in the workspace. You can modify it and submit it again.

## Publishing documents

Publishing a document means publishing the version of the document as it is at the time of publication. If you modify the document in the workspace once published, it is not modified in the section. Published documents are for consultation only and cannot be modified. If you want to modify a published document, you must modify it in the workspace and then publish the modified version of the document.

When you want to publish a document, you need to submit it to publishing. When the document is submitted to publication, the section's managers can approve the publication submission, that is to say publish the document, or reject it. In that last case, the document is not available in the section. However, it is still available in the workspace. You can modify it and submit it again.

In this section, we will see:

- [Submit a document to publishing](#)
- [Approve document publishing](#)
- [Reject document publishing](#)
- [Unpublish documents](#)

### Submit a document to publishing

Only users with writing or management rights in the workspace can submit a document to publication.

You can submit a document in several sections. The publishing workflows in the different sections are independent. The document can be published in a section and rejected in another one. The list of the sections in which you can publish a document is defined by your access rights. You can submit a document in sections in which you have at least reading rights.

### To submit a document to publishing:

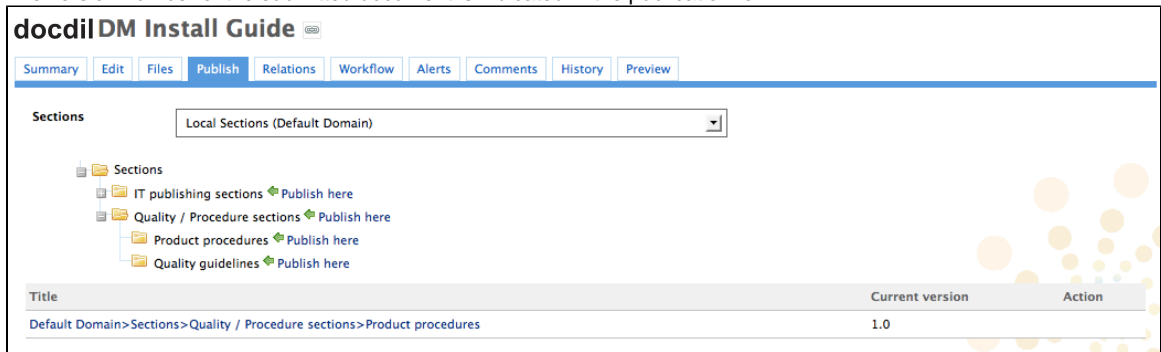
1. In the workspace, open the document to publish.
2. Click on the **Publish** tab.
3. Use the drop down list to select the domain you want to publish the document in.

✔ If you use only the default domain, the domain is selected by default.

4. Unfold the sections tree and click on the **Publish here** link corresponding to the section you want to publish the document in.



The version number of the submitted document is indicated in the publication form.



The document is available in the section for users with management rights only. It is also displayed in their dashboard as a pending document. The document must be approved to be available to all section readers.

✔ If you have management rights in the selected section, the document is automatically published. It doesn't need to be approved.

In the workspace, the document's minor version is automatically incremented.

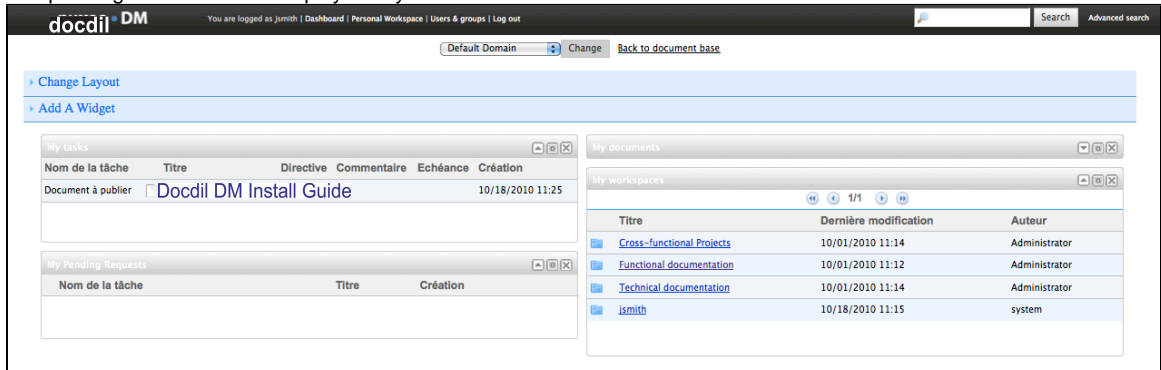
## Approve document publishing

Users with write and management rights in the section can approve the publishing of a document.

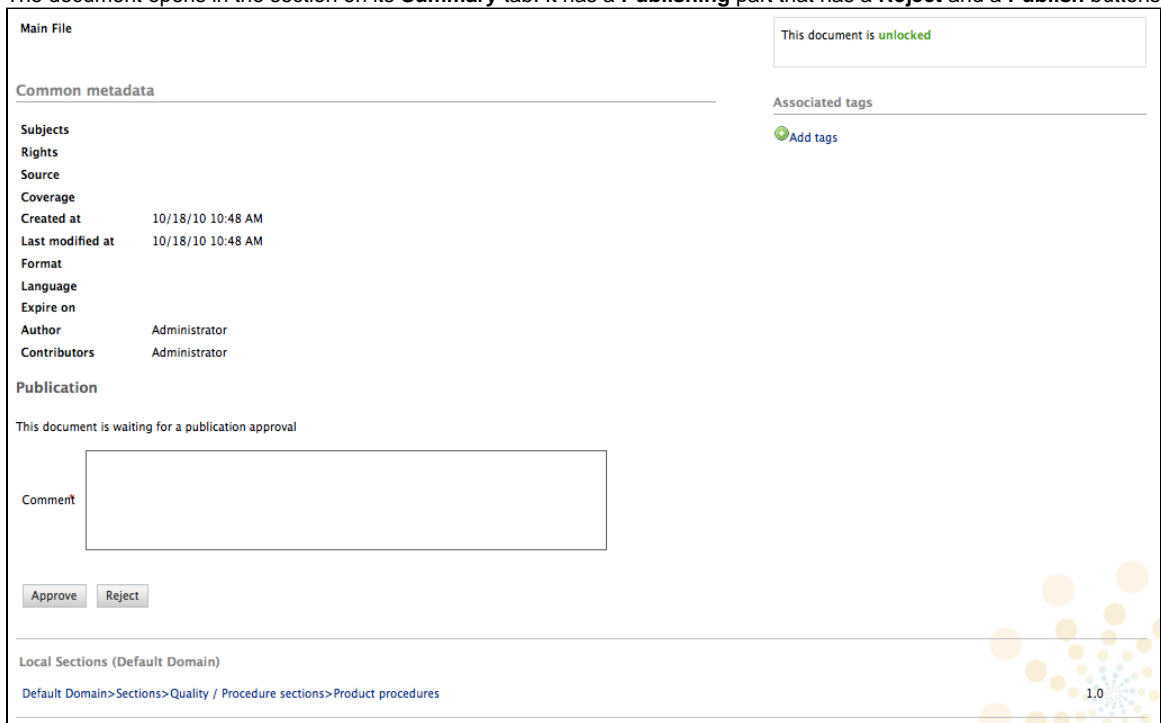
When a document is submitted to publication in a section in which you have management rights, it is displayed in your dashboard. You must then approve or reject the document.

### To publish a document:

1. Click on the **Dashboard** link in the top right corner of the window, to open your dashboard. The pending documents are displayed in your tasks.

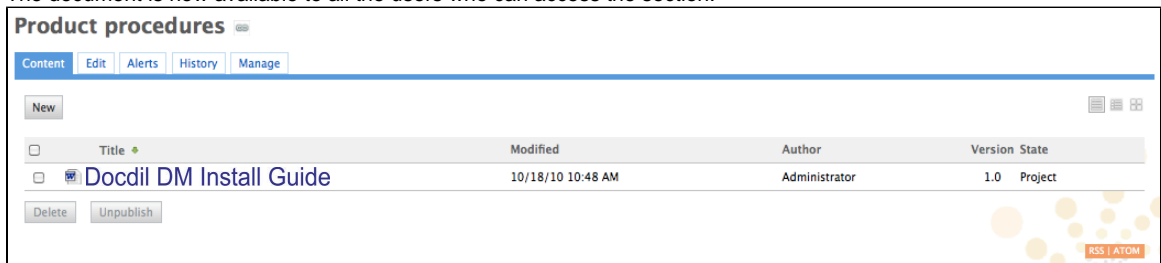


2. Click on the pending document. The document opens in the section on its **Summary** tab. It has a **Publishing** part that has a **Reject** and a **Publish** buttons.



Only users with management rights can see the pending document in the section.

3. Type a comment (optional).
4. Click on the **Publish** button. The document is now available to all the users who can access the section.



### Reject document publishing

Only users with write and management rights in the section can reject the publishing of a document.

When a document is submitted to publication in your section, you must decide if it can be published in it. If you think that the document is not ready for publication or that it shouldn't be published in this section, you must reject it.

✔ Only users with write and management rights can see the pending document in the section.

### To reject a document:

1. Click on the **Dashboard** link in the top right corner of the window, to open you dashboard. The pending documents are displayed in your tasks.

The screenshot shows the Docdil DM dashboard. At the top, it says 'You are logged as jsmith | Dashboard | Personal Workspace | Users & groups | Log out'. Below this, there are navigation links like 'Change Layout' and 'Add A Widget'. The main area is divided into 'My tasks' and 'My documents'. In 'My tasks', there is a table with columns: 'Nom de la tâche', 'Titre', 'Directive', 'Commentaire', 'Échéance', and 'Création'. One task is listed: 'Document à publier' with the title 'Docdil DM Install Guide' and a creation date of '10/18/2010 11:25'. Below this is a 'My Pending Requests' section with a similar table structure.

2. Click on the pending document. The document opens in the section. It has a **Publishing** part that has a **Reject** and a **Publish** buttons.
3. Type a comment explaining why you reject the document publishing. This comment is mandatory to reject the document publishing.

The screenshot shows the 'Publication' section of a document. It states 'This document is waiting for a publication approval'. Below this is a text input field containing the comment: 'This shouldn't be published in this section.' To the left of the input field is the label 'Comment'. At the bottom of the section, there are two buttons: 'Approve' and 'Reject'.

4. Click on the **Reject** button. The document is not published and is deleted from section content. You are redirected on the **Content** tab of the section. In the workspace, the fact that publishing was rejected is logged in the History of the document.

The screenshot shows the 'Docdil DM Install Guide' document page. At the top, there are tabs for 'Summary', 'Edit', 'Files', 'Publish', 'Relations', 'Workflow', 'Alerts', 'Comments', 'History', 'Preview', and 'Manage'. The 'History' tab is selected, showing an 'Event log' table. The table has columns: 'Performed action', 'Date', 'Time', 'Username', 'Category', 'Comment', and 'State'. The log shows several events, including 'Publication rejected' and 'Publication waiting'. The most recent 'Publication rejected' event has a comment: 'Publication rejected in /default-domain/sections/quality-procedure/product-procedures (DefaultSectionsTree-default-domain) with comment -- This shouldn't be published in this section.' Below the event log is an 'Archived versions' section with a table showing version 1.0 and buttons for 'Restore', 'View archived version', and 'Delete'.

## Unpublish documents

Only users with writing or management rights can unpublish a document from a section.

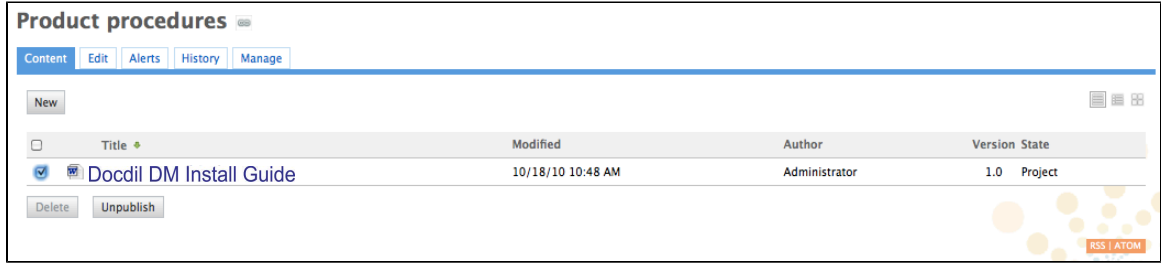
When a document is obsolete or inaccurate, it shouldn't be available in sections anymore. You have to unpublish it so section readers do not have

access to the document.

Unpublishing a document deletes the document from the section, but it does not delete the workspace document.

**To unpublish a document from a section:**

1. In the **Content** tab of the section, check the box in front of the document's name.



2. Click on the **Unpublish** button.  
The document is unpublished and does not appear in the section. The original document in the workspace is not deleted.

## Managing Docdil DM

Administrators can configure some elements directly from Docdil DM's user interface.

As an administrator, you are in charge of managing **users** in **groups**. You can create news users and groups, edit their properties, or even delete users or groups.

You can also **manage vocabularies**, i.e. the labels displayed in drop down lists.

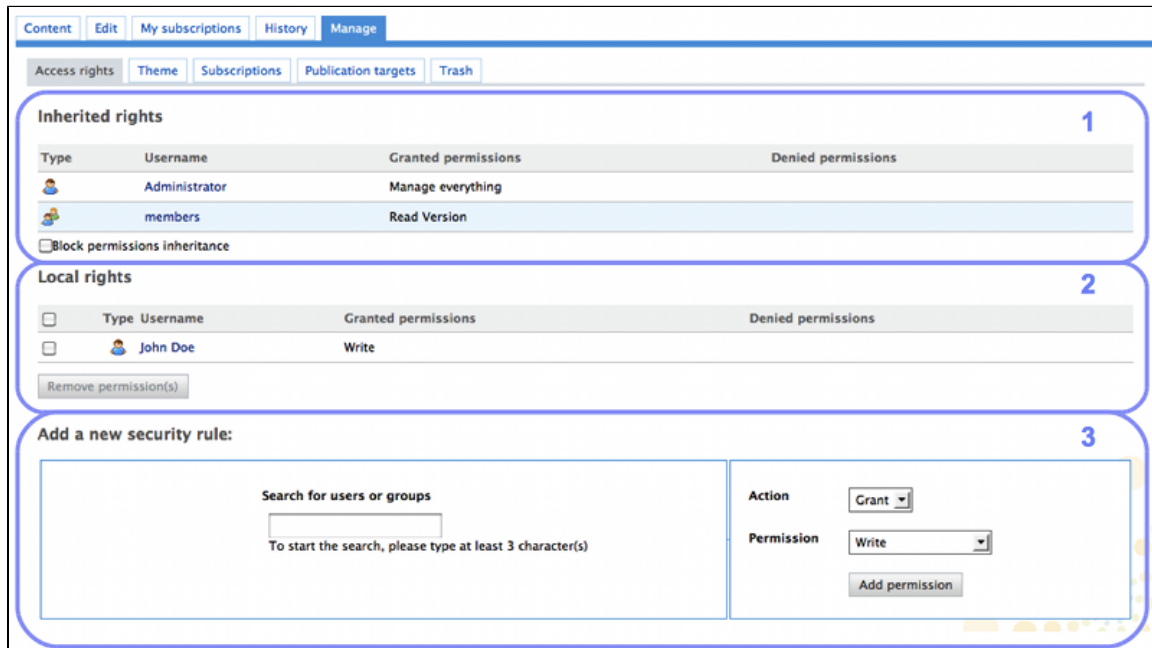
At a space level, space managers are in charge of **managing access rights**.

### Manage access rights

Only users with management rights can manage the access rights of a space.

Managing access rights means granting or denying access rights in a space. The access rights management screen is available as a sub-tab in the **Manage** tab of the space.

The access rights management sub-tab is accessible composed of three parts:



1. the **Inherited rights** part displays rights that were granted or denied in a parent space;
2. the **Local rights** part displays the rights that were granted or denied in the current space;
3. the form to grant or deny access rights in the current space.

### Rights prioritization

The access rights available are:

Right	Actions in workspaces	Actions in sections
Read	Consult content Comment documents Annotate documents Tag documents	Consult content Comment documents Annotate documents Tag documents Submit documents to publishing
Write	Create documents Edit documents Add / remove relations Start a workflow + Remove actions + read actions	Create sections + read actions
Manage	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + write and read actions	Manage access rights Set alerts to other users Apply a preset look on documents Manage deleted documents + write and read actions
Remove	Delete documents (this permission is included in <b>Write</b> right)	Delete sub-sections (this permission is included in <b>Write</b> right)
Can ask for publishing		Submit documents for publishing (this permission is included in <b>Read</b> right)
Comment	Add comments on <a href="#">websites</a>	
Moderate	Moderate comments on <a href="#">websites and blogs</a> if moderation is set to "Beforehand".	

As you can see, some rights include more permissions than others, and sometimes include other rights. That's the case for "Write", that includes "Remove".

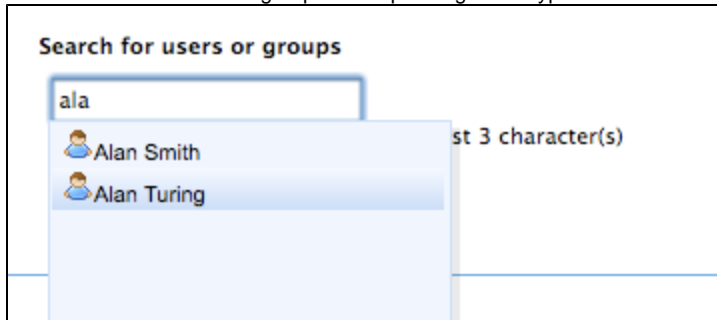
Beside the fact that some rights are stronger than others, you should be aware, when you set up rights on a space, that some rights are have priority over others:

- local rights have priority over inherited rights,
  - granted rights have priority over denied rights.
- The fact that the rights are given or denied to a single user or a group doesn't have any influence.

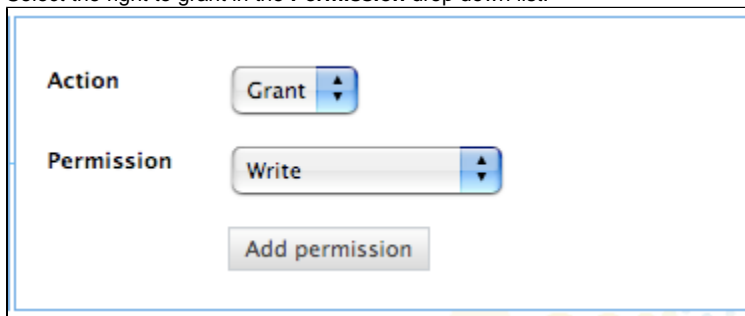
### Grant access rights

### To grant access rights:

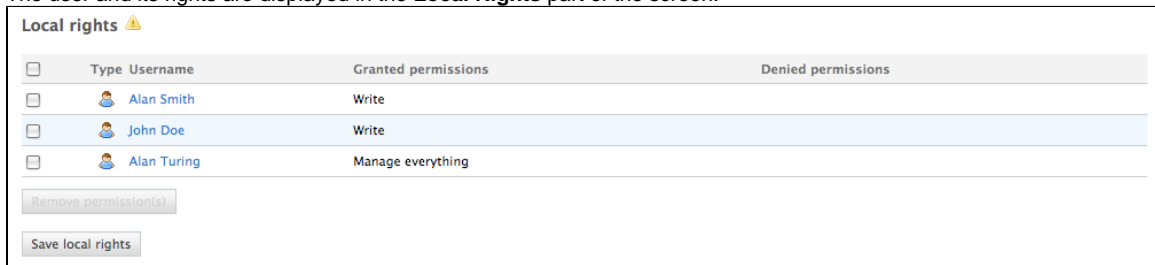
1. Click on the **Manage** tab of the space.  
The **Access Rights** sub-tab is displayed.
2. In the form, type the username of the user you want to grant rights to.  
To give access rights to a group, type the group's name.  
The names of the users or groups corresponding to the typed characters are automatically displayed as you type.



3. Click on the user you want to give access rights to.
4. Select the right to grant in the **Permission** drop down list.



5. Click on the **Add permission** button.  
The user and its rights are displayed in the **Local Rights** part of the screen.



6. Save local rights modification by clicking on the **Save local rights** button.  
Local rights are saved and applied.

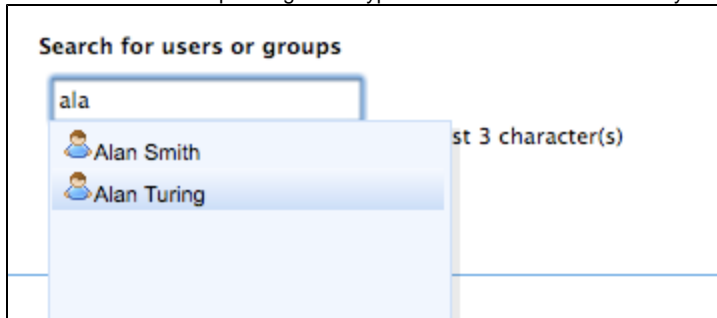
### Deny access rights

If a user has inherited rights that you don't want him to have in the current space, you can deny him these rights. If you want to deny access rights to a large number of users, block rights inheritance and give access rights only to the users you want to be able to access the workspace or section.



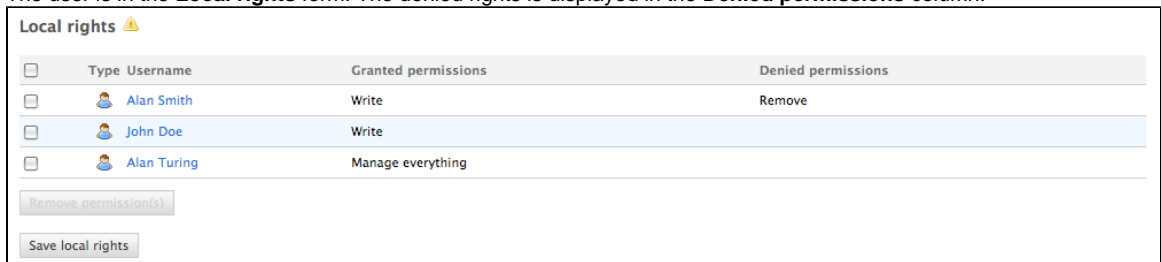
### To deny access rights:

1. Click on the **Manage** tab of the space.  
The **Access Rights** sub-tab is displayed.
2. In the form, type the username of the user you want to grant rights to.  
To deny access rights to a group, type the group's name.  
The usernames corresponding to the typed characters are automatically displayed.



3. Click on the user you want to deny rights to.
4. Select the right to deny in the **Permission** drop down list.
5. Click on the **Add permission** button.

The user is in the **Local rights** form. The denied rights is displayed in the **Denied permissions** column.



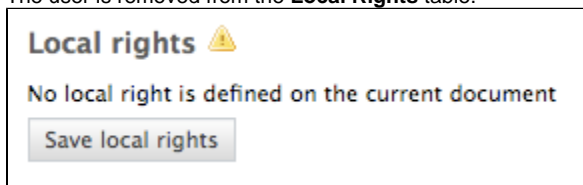
6. Save local rights modification by clicking on the **Save local rights** button.  
Local rights are saved and applied.

## Remove a user from local rights

If you want to refuse rights to a user, and that these rights have been granted in the current space, you can remove the user from the local rights.

### To remove a user from the local rights:

1. Click on the **Manage** tab of the space.  
The **Access Rights** sub-tab is displayed.
2. In the **Local Rights** part of the screen, check the box corresponding to the user you want to remove.
3. Click on the **Remove permission(s)** button.  
The user is removed from the **Local Rights** table.



4. Save local rights modification by clicking on the **Save local rights** button.  
Local rights are saved and applied.

## Block rights inheritance

The rights that are granted or denied in a space are applied to the space's content, including its sub-spaces. You thus have the same rights in the sub-spaces as in the parent space. That is called rights inheritance.

You can block this inheritance. It enables you to block the access of a sub-workspace to the workspace's users, for instance, or to deeply modify the access rights in the sub-workspace.

**To block rights inheritance :**

1. Click on the **Manage** tab of the space of which you want to the access rights.  
The **Access Rights** sub-tab is displayed.
2. Check the box **Block permissions inheritance** located under the **Inherited Rights** table.  
The inherited rights table is not displayed anymore.



You are added in the list of the local rights, like the administrators group.

Local rights				
<input type="checkbox"/>	Type	Username	Granted permissions	Denied permissions
<input type="checkbox"/>		administrators	Manage everything	
<input type="checkbox"/>		Alan Turing	Manage everything	

Remove permission(s)

In the **Access Rights** tab of the possible sub-workspaces of the workspace whose rights are blocked, a group Everyone is denied all rights.

Inherited rights			
Type	Username	Granted permissions	Denied permissions
	administrators	Manage everything	
	Alan Turing	Manage everything	
	Everyone		Manage everything

Block permissions inheritance

You can now grant access rights to users.

## Manage groups

Groups of users can be created and their properties modified directly in Docdil DM. Groups of users are used to manage access rights more easily.

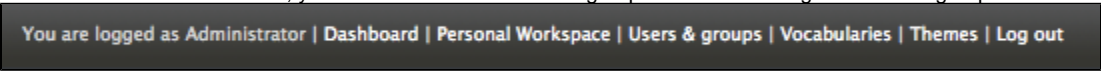
There are two default groups in Docdil DM:

- *administrators*: the members of this group are administrators of the application. They can manage users, vocabularies and documents.
- *members*: the members of this group by default have reading rights on all the content of the application.

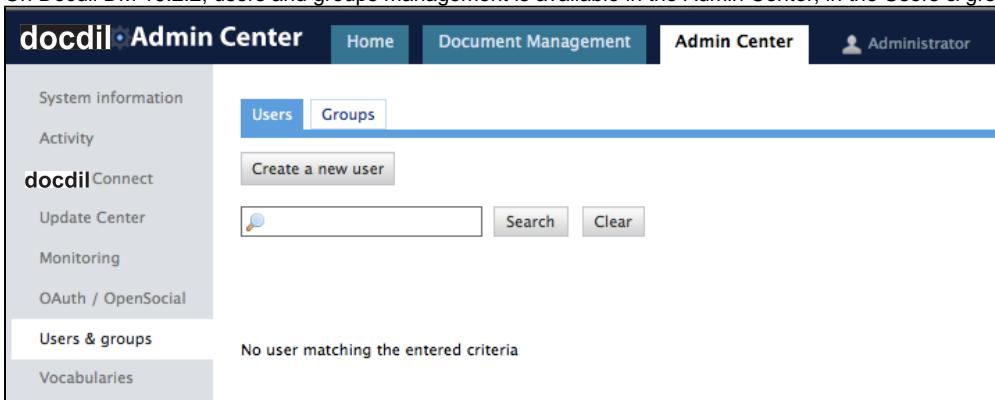
Groups can be composed of users and of sub-groups. Sub-group's members automatically become members of the parent group. Thus, they are granted all the access rights you give to the group.

Depending on the version of Docdil DM you are using, the users and groups directories are available at different locations.

- On Docdil DM 19.2.0 to 19.2.1, you can access the users and groups directories using the Users & groups link in the page header.



- On Docdil DM 19.2.2, users and groups management is available in the Admin Center, in the Users & groups tab.



## Groups parameters

Field	Description
Group name	The name of the group is its ID.
Group's members	Users that belong to the group.
Sub-groups	Groups that belong to the group.

## Create a group

Only administrators can create groups of users.

**To create a group of users:**

1. Go to the users and groups management:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Users & groups link in the page header.
  - On Docdil DM 19.2.2, click on the Admin Center main tab, and then on the Users & groups tab. The directory opens on the **Users** tab.
2. Click on the **Groups** tab. A search form and the list of the existing groups is displayed.
3. Click on the **Create a new Group** button.
4. Fill in the creation form.
5. Click on the **Save** button. The **View** tab of the group's card is displayed.

If you need to create several groups, click on the **Save and create** button. Your group is saved and the group creation form is displayed so you can immediately create another group.

## Edit a group

Only administrators can modify groups.

Modifying groups consists in adding or removing members of the group. The name of the group cannot be changed.

### members

Delete
View Edit

---

**Group's members**

To start the search, please type at least 3 character(s)

**Search for users**

- ✕ John Doe
- ✕ Marge White
- ✕ Clark Parker

**Sub-groups**

To start the search, please type at least 3 character(s)

**Search for groups**

- ✕ project-managers
- ✕ redactors

Save

### To edit a group:

1. Go to the users and groups management:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Users & groups link in the page header.
  - On Docdil DM 19.2.2, click on the Admin Center main tab, and then on the Users & groups tab.  
The directory opens on the **Users** tab.
2. Click on the **Groups** tab.  
A search form is displayed.
3. Search a group and click on its name to open its card.  
The card displays the members and sub-groups of the group in the **View** tab.
4. Click on the **Edit** tab.  
The modification form is displayed.
5. Modify the group's members and click on the **Save** button.  
The **View** tab of the group is displayed with the modifications you just made.  
The new group members are immediately granted the group's access rights. The users who are no longer members of the group are denied group's access rights. However they still have their individual access rights.

## Delete a group

Only administrators can delete groups.


### To delete a group:

1. Go to the users and groups management:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Users & groups link in the page header.
  - On Docdil DM 19.2.2, click on the Admin Center main tab, and then on the Users & groups tab.  
The directory opens on the **Users** tab.
2. Click on the **Groups** tab.  
A search form is displayed.
3. Search the group to delete and click on its name to open its card.  
The card displays the members and sub-groups of the group in the **View** tab.
4. Click on the **Delete** button.  
A window pops up.
5. Click on the **OK** button.  
The group search form is displayed. The group is displayed and its members lose the group's access rights.

## Manage users

Only administrators can manage users and groups. They can create new users and groups, modify their properties or delete them. It is also possible to connect Docdil DM to an external directory (LDAP directory for instance). This procedure is explained in the Docdil EP Reference Guide.

Users can only consult users and groups directories. Administrators can create, edit and delete users and groups.

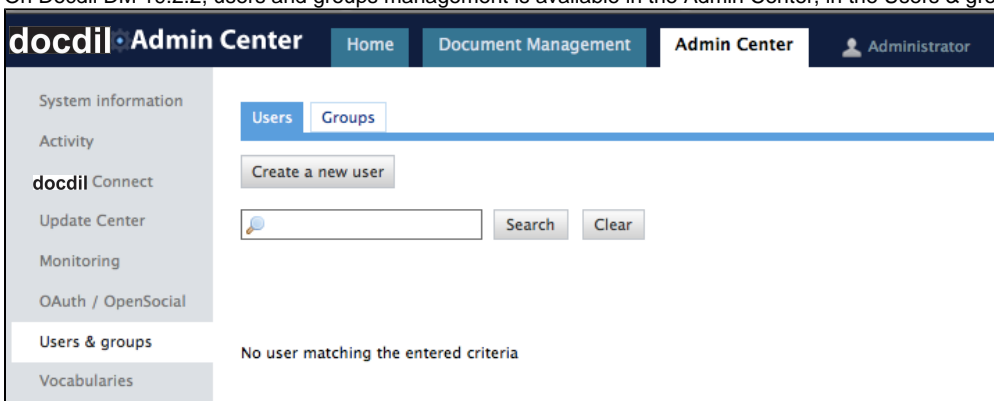
 When you use an external directory for users and groups, the actions available on users and groups are limited, even to administrators.

Depending on the version of Docdil DM you are using, the users and groups directories are available at different locations.

- On Docdil DM 19.2.0 to 19.2.1, you can access the users and groups directories using the Users & groups link in the page header.

You are logged as Administrator | Dashboard | Personal Workspace | Users & groups | Vocabularies | Themes | Log out

- On Docdil DM 19.2.2, users and groups management is available in the Admin Center, in the Users & groups tab.




## User's parameters

Field	Description
Username	Name the user will use to log in.
First Name	First name of the user
Last Name	Last name of the user
Company	Company or organization of the user
Email	email of the user. This address is used for alerts.
Password	User's password
Password (Verify)	User's password
Groups for this user	Groups of which the user is a member. User must be at least in 'administrators' or 'members' group, or one of their sub-groups.
Virtual groups for this user	

## Create a user

Only administrators can create new users.

By default, Docdil DM has one user, called Administrator. This user is the administrator. You must use this user to create new users and delegate them access right.

 User must be at least in 'administrators' or 'members' group, or one of their sub-groups to be able to access the application's content.

### To create a user:

- Go to the users and groups management:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Users & groups link in the page header.
  - On Docdil DM 19.2.2, click on the Admin Center main tab, and then on the Users & groups tab.  
The members management interface opens on the user directory search form.
- Click on the **Create a new user** button.
- Fill in the user creation form.  
Mandatory fields are indicated by a red asterisk.
- Click on the **Save** button.  
The card of the new user is displayed. You can modify its properties and its password.  
The user can immediately connect to the Docdil DM application using his or her username and password.

**jdoe**

Delete

View Edit Change password


**Username** jdoe

**First name** John

**Last name** Doe

**Company** docdil

**Email** jdoe@docdil.com

**Groups for this user**  members

**Virtual groups for this user**

## Edit a user's properties

Only administrators can modify other users' properties. But every user can modify his or her own properties.

You cannot edit the username, as it is the ID of the user on the application.

**jdoe**

Delete

View Edit **Change password**

Username: jdoe

First name:

Last name:

Company:

Email\*:

Groups for this user: Search for groups

members

To start the search, please type at least 3 character(s)

Virtual groups for this user

Save

When you are using an external directory for users management, the **Edit** tab is not displayed as you cannot edit the users' properties (managed directly from the directory).

### To modify a user's properties:

- Go to the users and groups management:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Users & groups link in the page header.
  - On Docdil DM 19.2.2, click on the Admin Center main tab, and then on the Users & groups tab. The members management interface opens on the user directory search form.
- Search a user and click on the user's name to open his or her card. The user's card is displayed.
- Click on the **Edit** tab.
- Modify the fields in the modification form.
- Click on the **Save** button. The **View** tab is displayed with your modifications.

## Change a user's password

Only administrators can modify other users' password. However every user can modify his or her own password.

When you use an external directory for users management, the **Change password** tab is not displayed as you cannot edit your password.

**jdoe**

Delete

View Edit **Change password**

Password:

Password (Verify):

Virtual groups for this user


Save

### To modify a user's password:

1. Go to the users and groups management:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Users & groups link in the page header.
  - On Docdil DM 19.2.2, click on the Admin Center main tab, and then on the Users & groups tab.  
The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.  
The user's card is displayed.
3. Click on the **Change password** tab.
4. Type the new password and confirm it.
5. Click on the **Save** button.  
The **View** tab is displayed. The user must use his or her new password the next time he or she logs in.

## Delete a user

Only administrators can delete users.

 Deleting a user is a permanent action.

### To delete a user:

1. Go to the users and groups management:
  - On Docdil DM 19.2.0 to 19.2.1, click on the Users & groups link in the page header.
  - On Docdil DM 19.2.2, click on the Admin Center main tab, and then on the Users & groups tab.  
The members management interface opens on the user directory search form.
2. Search a user and click on the user's name to open his or her card.  
The user's card is displayed.
3. Click on the **Delete** button.  
A window pops up.
4. Click on the **OK** button.  
The user is deleted. He or she cannot log in to the Docdil DM application.

## Manage vocabularies

Only administrators can consult and manage vocabularies.

Vocabularies are the lists of labels used in the application, for instance in drop down lists. A vocabulary is composed of several entries, that are the options in the drop down lists. Some vocabularies are hierarchical, i.e. they have several levels. For instance, the **Subjects** metadata uses a two level vocabulary. First level is **Topic**. Second level is **Subtopic** and each entry is linked to a **Topic** entry.



Functional administrators can only modify or delete vocabularies. They cannot create a new vocabulary from the user interface.

## Consult vocabularies

All vocabularies editable from the user interface are listed in the vocabularies management interface.

Depending on the version of Docdil DM you use, you won't access the vocabularies the same way

**To consult a vocabulary or its entries on Docdil DM 19.2.0 to 19.2.1:**

1. Click on the **Vocabularies** link, located at the top of the page.

You are logged as Administrator | Dashboard | Personal Workspace | Users & groups | Vocabularies | Themes | Log out

The list of the application vocabularies is displayed.

### Vocabularies

- external gadget list
- [continent](#)
- country
- topic
- subtopic
- subject
- sort\_order
- search\_operators
- predicates
- inverse\_predicates
- language

2. Click on the name of the vocabulary you want to consult.  
The vocabulary entries are displayed.

subtopic

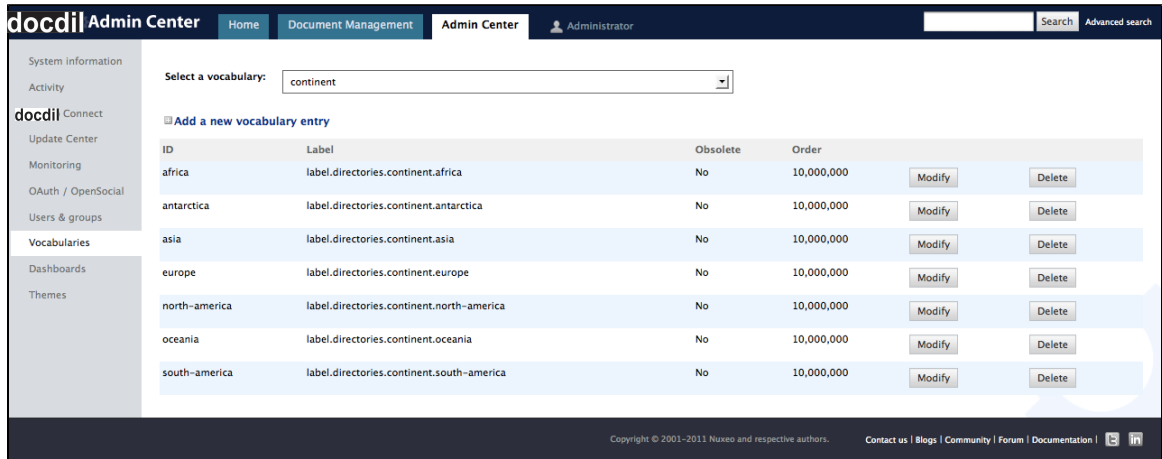
Add a new vocabulary entry

Parent	ID	Label	Obsolete	Order		
Art	art history	label.directories.subtopic.arthistory	No	10,000,000	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
Art	literature	label.directories.subtopic.literature	No	10,000,000	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
Art	cinema	label.directories.subtopic.cinema	No	10,000,000	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
Art	comics	label.directories.subtopic.comics	No	10,000,000	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
Art	show	label.directories.subtopic.show	No	10,000,000	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
Art	danse	label.directories.subtopic.danse	No	10,000,000	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>



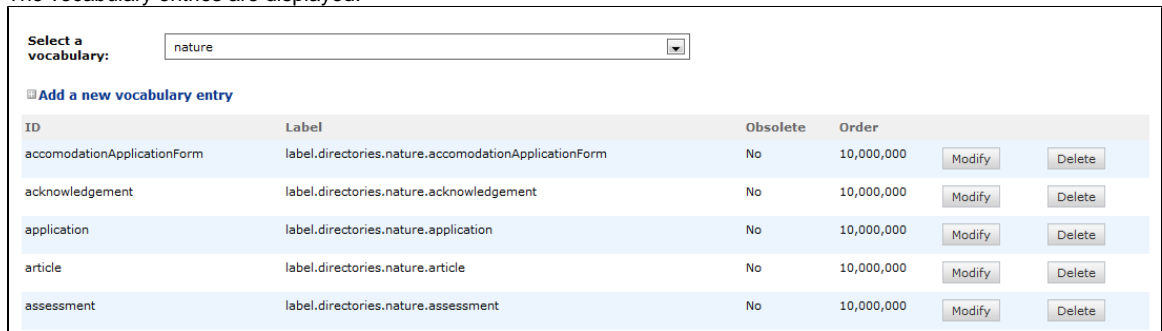
**To consult a vocabulary or its entries on Docdil DM 19.2.2:**

1. Click on the **Admin Center** main tab.
2. Click on the **Vocabularies** tab.



The vocabularies drop down list is displayed. The first vocabulary's entries are displayed.

3. Select the vocabulary you want to consult in the drop down list.  
The vocabulary entries are displayed.



By default, the labels of default vocabularies entries are the IDs of labels in properties files of source code.

### Vocabulary entries parameters

Field	Description
ID	Unique identifier for the vocabulary entry. The ID is not displayed to users.
Parent	This field is only displayed on hierarchical vocabularies second level. It indicates to which 1st level entry the current value is linked.
Label	Value of the entry that will be displayed to users on the application.
Obsolescence	Indicates if the entry should be displayed in the available values on edition.
Order	Indicates the rank of the entry in the vocabulary. Order is set at "10,000,000" by default.

### Edit vocabularies

When you modify a vocabulary, you can add new entries, edit or delete them.

#### Add a new vocabulary entry

### To add an entry to a vocabulary:

1. Consult the [vocabulary](#) to add an entry to.
2. Click on the **Add a new vocabulary entry** link.  
The entry creation form is displayed under the link.
3. Fill in the entry creation form.

**topic**

▣ **Add a new vocabulary entry**

**Entry details**

ID\*

Label

Obsolete  No  Yes

Order

4. Click on the **Add** button.  
The new entry is displayed in the list of the vocabulary entries.

### Edit a vocabulary entry

Editing a vocabulary entry can be:

- change its label,
- make it obsolete,
- change its order.

When you make an entry obsolete, it means that it will not be displayed in the available choices when you edit a document. But the value is still displayed on **Summary** tab of documents.

### To modify a vocabulary entry:

1. Consult the [vocabulary](#) in which you want to edit the entry.  
Click on the **Modify** button corresponding to the entry you want to modify.  
The entry modification form is displayed.
2. Edit the entries properties.

**topic**

ID art


Label

Obsolete  No  Yes

Order

3. Click on the **Save** button.  
The list of the vocabulary entries is displayed.


### Delete a vocabulary entry

 Deleting a vocabulary entry is a permanent action.

### To delete vocabulary entry:


1. Consult the [vocabulary](#) to delete an entry from.
2. Click on the **Delete** button of the entry to erase.
3. On the window that pops up, click on the **OK** button.  
The entry is permanently erased. The list of the vocabulary entries is displayed.

## Manage dashboards

 The dashboards management is available since version 19.2.2 of Docdil DM.

The administrators of a Docdil DM application can set up the dashboards that will be displayed to users. On a default Docdil DM instance, administrators can:

- define the default user dashboard, which is the dashboard displayed to authenticated users by default and which they can [customize](#);
- add external gadgets that users will be able to display on their dashboard by [customizing it](#).

 When anonymous access to Docdil DM is enabled, administrators can define the anonymous dashboard, which is the dashboard displayed to users that are not logged in. The configuration of the anonymous dashboard works exactly [like the default user dashboard](#).

### Define the default user dashboard

The user default dashboard is used to generate the user's dashboard the first time the user logs in, and when the user clicks on the "Restore default" button on his dashboard.

Docdil DM includes a dashboard that is proposed as the default user dashboard. You can edit this default user dashboard to make it adapted to your organization and users. Editing the default user dashboard works the same way users can edit their dashboard. You can:

- [change the dashboard layout](#),
- [add or remove gadgets](#),
- [edit widgets](#).

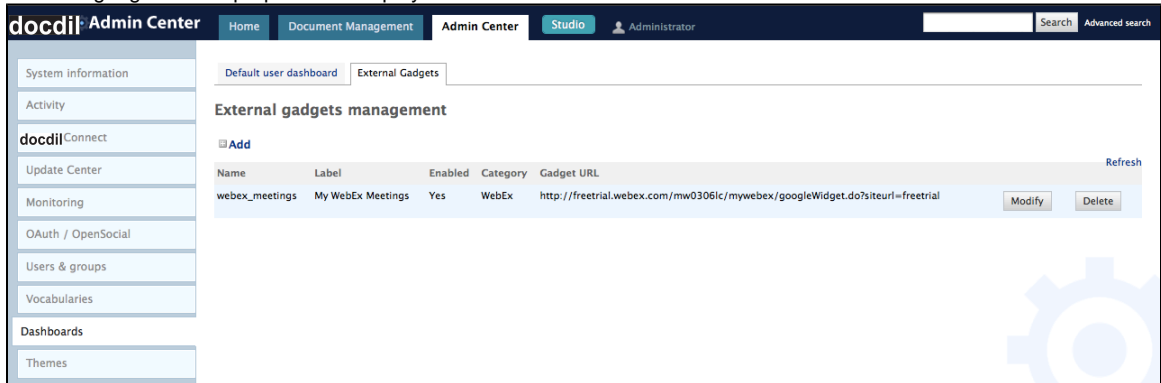
### Manage external gadgets

As an administrator, you can add and manage gadgets from other applications or websites so that they are available for users when they click on the "Add gadget" button.

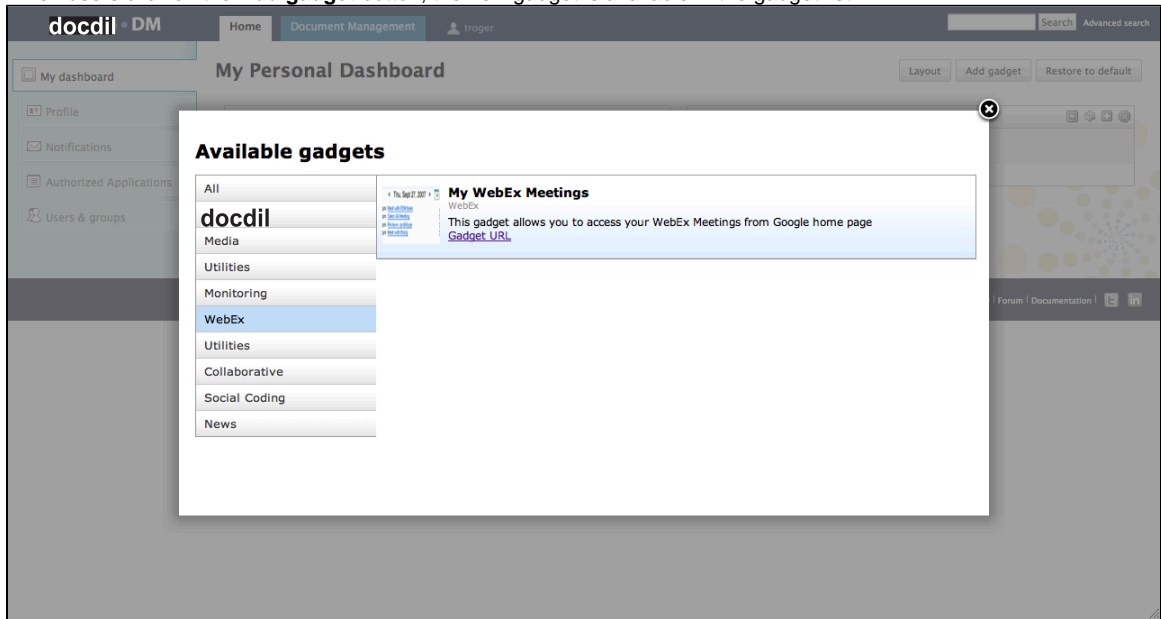
#### Add external gadgets

### To add an external gadget:

1. On the website which provides the external gadget, copy the gadget's URL.
2. Log in to Docdil DM.
3. In the Admin Center, click on the **Dashboards** tab.
4. Click on the **External gadgets** tabs.  
The **Add** link is displayed.  
If you already added some external gadgets, the list of configured gadgets is displayed.
5. Click on the **Add** link  
The form to add a gadget is displayed.
6. Fill in the form (see below for gadget parameters).
7. Click on the **Create** button.  
The new gadget and its properties is displayed in a table.



When users click on the **Add gadget** button, the new gadget is available in the gadget list.



#### External gadget properties

Field	Description
Name	The technical name of the gadget, that can used by the administrator.
Label	Title of the gadget displayed in its title bar when it's used on the dashboard.
Enabled	Select if your gadget should be displayed in the list of gadgets.
Category	Category in which the gadget will be available. You can either type the name of an existing category or type the name of a new category. Default categories are: Docdil, Media, Monitoring, Utilities, Collaborative.
Gadget URL	Type the URL of the widget

Icon URL

URL of the icon to be displayed on the gadget selection pop up if the external gadget has no icon provided by default.

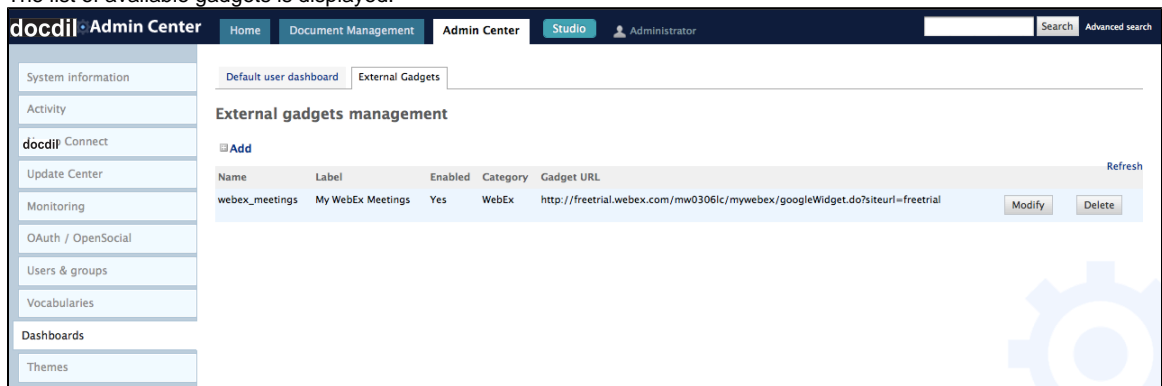
### Modify an external gadget

You can edit the external gadgets you have added at any time. Editing an gadget means changing its properties (for instance updating it

#### To edit an external gadget:

1. In the Admin Center, click on the **Dashboards** tab.
2. Click on the **External gadgets** tabs.

The list of available gadgets is displayed.



3. Click on the **Modify** button of the widget to edit. The gadget edit form is displayed.
4. Modify the properties you want to change.
5. Click on the **Save** button.

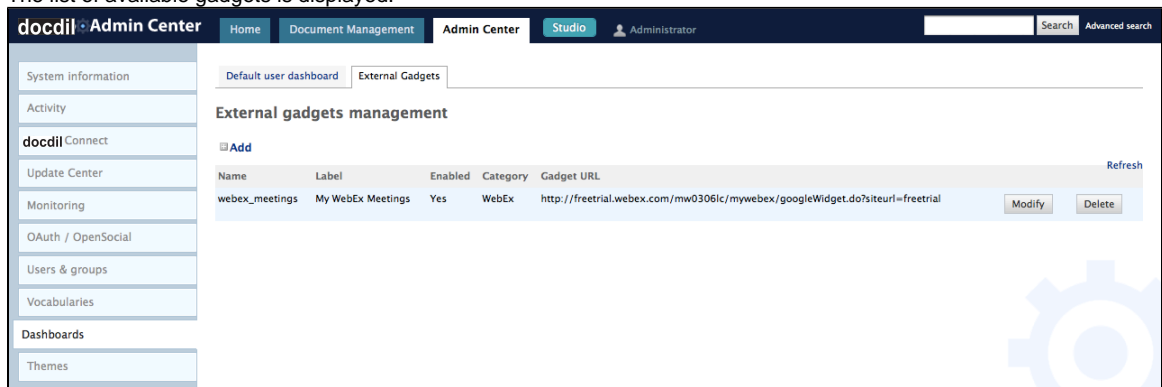
### Delete an external gadget

When you delete an external gadget, it is **not** removed from the dashboard of the users who already added it.

#### To delete an external gadget:

1. In the Admin Center, click on the **Dashboards** tab.
2. Click on the **External gadgets** tabs.

The list of available gadgets is displayed.



3. Click on the **Delete** button of the gadget to remove. A confirmation window pops up.
4. Click on **OK** to confirm gadget deletion. The gadget is deleted and is not in the gadget list anymore. However it is still displayed on the dashboard of users who added it to their dashboard.

## Manage authentication with other applications

Docdil DM 19.2.2 offers the possibility to use external gadgets in Docdil DM from the user interface and to use Docdil DM's gadgets in other websites or applications.

External gadgets can be from public websites and applications, but you can also add gadgets from websites or applications that require you to log in, like a gadget from your email provider. If you want to use Docdil's gadgets in other applications, authentication is required as well.

OAuth is a protocol that enables external applications and Docdil DM to access each other's data. Users can allow "consumer" (ie external) applications and websites to access the Docdil DM data, Docdil DM being the "provider".

In this section, we will take the example of iGoogle, that we want to authorize to display Docdil DM's data in a gadget.

**To authorize external application to access Docdil DM content:**

1. In the Admin Center tab, click on the **OpenSocial / OAuth** tab.
2. Click on the **Consumer** tab.
3. Click on the **Add** link.  
The form to add a new consumer is displayed.
4. Fill in the form with the parameters below.
5. Click on the **Create** button.

**Google consumer parameters**

Field	Parameter
Consumer Key	www.google.com
Consumer Secret (HMAC Signature)	Leave empty
Consumer Public Key (RSA Signature)	

```

-----BEGIN CERTIFICATE-----
MIIDBCCAm2gAwIBAgIJAK8dGINfkS
THMA0GCSqGSib3DQEBBQUAMGAcCzAJ
BgNV
BAYTA1VTMQswCQYDVQQIEwJDQTEWMB
QGA1UEBxMNTW91bnRhaW4gVm1ldzET
MBEG
A1UEChMKR29vZ2x1IE1uYzEXMBUGA1
UEAxM0d3d3Lmdvb2dsZS5jb20wHhcN
MDgx
MDA4MDEwODMyWhcNMDkxMDA4MDEwOD
MyWjBgMQswCQYDVQQGEwJVUzELMAkG
A1UE
CBMCQ0ExFjAUBgNVBAcTDU1vdW50YW
luIFZpZXcxZzARBgNVBAoTCkdvb2ds
ZSBJ
bmMxZzAVBgNVBAMTDnd3dy5nb29nbG
UuY29tMIGfMA0GCSqGSib3DQEBAQUA
A4GN
ADCBiQKBggQDUV7ukIfIixbokHONGM
W9+ed0E9X4m99I8upPQp3iAtqIvWs7
XCbA
bGqzQH1qX9Y00hrQ5RRQj8OI3tRiQs
/KfzGW0dvLpIk5oXpdT58tg4F1Yh5f
bhIo
VoVn4GvtSjKmJFsoM8NRtEJHL1aWd+
+dXzkQjEsNcBXwQvfDb0YnbQIDAQAB
o4HF
MIHCMB0GA1UdDgQWBBSm/hlpNY91bN
fw08ac9riYzs3cxzCBkgYDVR0jBIGK
MIGH
gBSm/hlpNY91bNfw08ac9riYzs3cx6
FkpGIwYDELMAkGA1UEBhMCVVMxMzAJ
BgNV
BAGTAkNBMRywFAYDVQQHEw1Nb3VudG
Fpb1BwaWV3MRMwEQYDVQQKEwphb29n
bGUg
SW5jMRcwFQYDVQQDEw53d3cuZ29vZ2
xlLmNvbYIJAK8dGINfkSTHMAwGA1Ud
EwQF
MAMBAf8wDQYJKoZIhvcNAQEFBQADgY
EAYpHTTr3vQNsHHHUm4MkYcDB20a5Kv
cFoX
gCcYtmdyd8rh/FKeZm2me7eQCXgBfJ
qQ4dvVLJ4LgIQiU3R5ZDe0WbW7rJ3M
9ADQ
FyQoRJP8OIMYW3BoMi0Z4E730KSLRh
6kflq4rK6vw7lkH9oynaHHWZSJLDap
17cP
j+6znWkN9/g=
-----END CERTIFICATE-----

```

Description	Leave empty
Allow 2 legged auth	Leave default value.
Callback URL	<a href="http://oauth.gmodules.com/gadgets/oauthcallback">http://oauth.gmodules.com/gadgets/oauthcallback</a>
Allow OAuth verifier check bypass	Check "Yes".
Enabled	Check "Yes".

For more information, take a look at these pages:

- [How OpenSocial and OAuth are integrated in the Docdil applications,](#)
- [How to use OAuth.](#)

## Marketplace addons

Here is the list of Docdil packages available on the Docdil Marketplace for Docdil DM 19.2.x:

Package name	Public / Registered access	Comment
<a href="#">Amazon S3 Online Storage</a>	Registered access	
<a href="#">Automated Document Categorization</a>	Public	
<a href="#">Digital Signature</a>	Registered access	
<a href="#">Document access tracking</a>	Public	
<a href="#">Easy Bookmark Plugin</a>	Public	
<a href="#">Docdil - BIRT Integration</a>	Registered access	
<a href="#">Docdil GSA Connector</a>	Registered access	
<a href="#">Semantic entities</a>	Public	
<a href="#">Smart Search</a>	Public	

## Automated Document Categorization

The Automated Document Categorization package enables the system to automatically fill in some metadata of the document when it is created, from the document's content. When a user creates a new document, the text of the note or of the file is analyzed and the system fills some metadata automatically from this text. This occurs when documents are created using all the means provided by Docdil DM (the New button, Import a file button and Drag&Drop).

The metadata that the system fills in automatically are:

- language
- coverage
- subjects

You can at anytime edit the document to change and complete the metadata of the document. The system fills the metadata at document creation, but then it doesn't update or control them when the document is edited.



## Digital Signature

The digital signature add-on introduces PDF signing capabilities to Docdil DM (19.2.2)/Docdil Content Application Platform (5.5 & up). This add-on also provides generation of user certificates, which are required for document signing.

The Docdil DM Digital Signature add-on allows you to:

- download the PDF for previewing,
- download the root certificate to install inside your PDF viewer for verifying any future certificates,
- navigate to certificate generation,
- sign the PDF,
- view existing certificates without opening the signed PDF

## Digital signature concepts

### Principles

- documents are signed to protect them from modification, especially at critical stages in their life-cycle
- document- and user-certification in Docdil DM follow principles of asymmetric cryptography, PKI & the X.509 standards
- to sign a document, a user needs a personal certificate
- each user can create her own certificate
- certificates are issued by Certificate Authorities (CAs)

### What is a digital signature?

... or why sign your documents digitally?

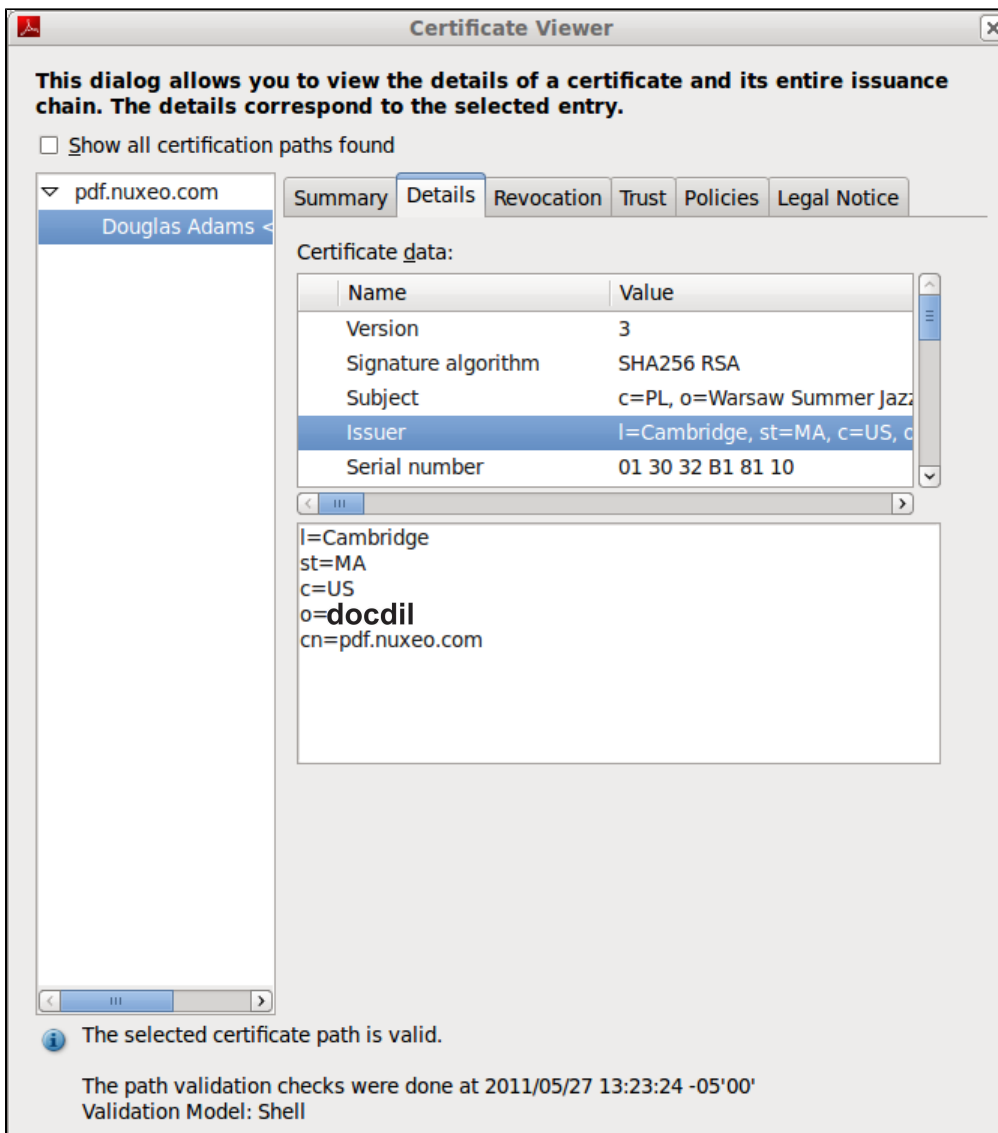
Digital signatures uniquely identify the document signer. They provide a similar functionality to handwritten signatures on paper, and are a convenient alternative to signing and scanning documents when a digital version of a document is required. Digital signatures are meant to assure authenticity and integrity of documents, that is to verify that the document originator - or signer - is who they claim to be, and to ascertain that a document has not been tampered with between the moment of signing and the subsequent viewing.

### What is a digital certificate?

Before you sign a document you need a digital certificate. Certificates are attached to documents to verify the identity of the signer, that is to check that the person signing the message is who they claim to be. Certificates are issued by Certificate Authorities (CA, also known as Issuer). To verify that a certificate has not been tampered with, it has to be validated against the CA's public key. If this verification is passed it means that the CA certifies the authenticity of the signer. Digital certificates are formatted using PKI standards, the most common of them is X.509, which is also used in this add-on.

### In this section

- Digital signature concepts
  - Principles
  - What is a digital signature?
  - What is a digital certificate?
  - The Local CA and the Root CA
    - Root Certificate Authority
    - Local CA
  - CA-signing vs self-signing
- Installation
  - How to make sure that the Digital Signature plugin was installed correctly? How can one test the installation?
- Configuration
  - The root certificate
    - Setting up the local root certificate
  - Company information for new certificates
- How to use the digital signature
  - Top-level view
  - Generate your certificate
  - Sign a document
  - Verify the signature of the PDF file
- References



## The Local CA and the Root CA

## Root Certificate Authority

The highest level certificates are created by root CAs which are supposed to be trusted publicly. No higher authority can certify the root certificates – those are the top-level certificates.

You can see examples of those in your browser, under the certificate authorities/ CA section.

Here are some of the more popular ones:

Equifax Secure CA; VeriSign Class 3 Public Primary Certification Authority; Visa eCommerce Root; Deutsche Telekom Root CA 2

## Local CA

Your Local CA will be used to sign user certificates. The local CA certificate can either be signed by a higher-level certificate authority, or be self-signed. The local CA certificate will be created inside the system hosting your Docdil CAP/DM instance.

Note: the default Local CA that comes with our plugin is just an example certificate to be used for initial setup testing, and it should not be used for signing production documents.

### Certification chains

Now let's consider the following relationships:

1. The document signature includes => the signer's certificate (user certificate)
2. user certificate was signed with => your local CA certificate
3. your local CA certificate was signed by => a higher level CA certificate
4. the higher level CA certificate was signed by => a still higher CA certificate (... and so on... ..and then, finally)
5. a very high level CA certificate was signed by => the root CA certificate.

The root CA certificate closes the chain that leads down to the user's certificate.

Now, instead of verifying all the intermediary certificates, it is enough for your PDF viewer to have the root Certificate Authority – via the sequence of intermediary CAs – verify it for you.

The root certificates are usually already present in popular PDF viewers and browsers, and if not, they can be updated automatically provided your software has been set up properly.

## CA-signing vs self-signing

... as applied to you local CA certificate:

If your local CA certificate was signed by a certificate authority, the users usually don't have to install your company's certificate in their browsers to verify the signed documents.

On the other hand, if your local CA was self-signed, the CA-certificate has to be manually installed in the PDF viewer prior to verifying signatures. This has to be done only once per PDF viewing program and an example of certificate installation in a PDF viewer has been presented in our documentation.

## Installation

1. Install the package from the Admin Center
2. Configure the certificates so that they match your company's profile.
3. Restart Docdil DM.

## How to make sure that the Digital Signature plugin was installed correctly? How can one test the installation?

When you perform the standard installation this plugin works as expected. However, if you wanted to verify that all is where it should be (e.g. if you are not sure if you already restarted your Docdil application, or you made some other system changes that you think might have impacted this plugin's operation, here are some ways to verify the installation:

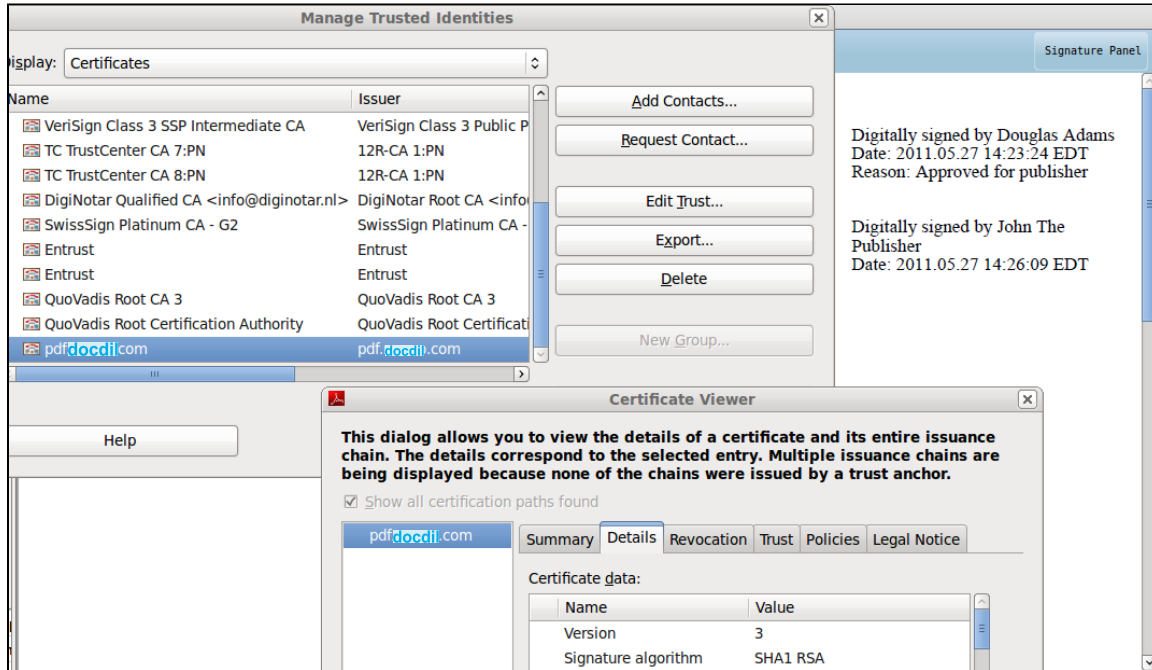
1. check in your local package list that the "Digital Signature" plugin shows as installed (Admin Center > Update Center > Local Packages).
2. click on the "Home" tab and make sure that you see the "Certificates" tab on the left, among other tabs like "My Dashboard", "Profile", etc
3. upload a new file of type PDF. This will create a new document. When you look at the tabs of your new document you should see a new tab called "Signature"
4. try to sign your new document (the ultimate test)
  - a. you should be directed to the "Certificates" tab first to create your certificate,
  - b. after creating a certificate you should see a sign-form in your document (signature tab)
  - c. sign the document, preview it and you should see a signature field in your PDF.

## Configuration

The Digital Signature package provides a sample root certificate populated with sample company's values. However you will need to configure the package so that documents are signed with your company's certificate and information instead of the sample one.

## The root certificate

**i** To disambiguate, the term "root certificate" in this article - and in the configuration of this plugin - relates to the Local Certificate Authority (CA) of your company which is the root of all user certificates. This is not to be confused with the global root Certificate Authority, that is one of the top-most entities of the global "chain of trust". This plugin's root certificate helps establish a simple method of user certificate verification, as it can be installed in a PDF reader. The best approach, however, is to have your local Certificate Authority's certificate signed by a higher level CA whose ancestor has been signed by one of the actual root Certificate Authorities. This incurs some setup overhead in the initial stages of the project. This method guarantees, though, a more secure approach to document verification, and frees the end users from having to install certificates in their PDF readers. PDF readers capable of handling security are updated automatically with the global root Certificate Authority information.



As the keystore configured in the installable package is a sample keystore containing a test configuration, it is required that it be replaced with the client keystore containing the keypair and the certificate to be used for signing user certificates. As of now the certificate+keypair need to be stored in a .jks formatted keystore and configured via the extension mechanism.

## Setting up the local root certificate

The user certificate generation step requires a Certificate Authority certificate (CA) to be set up inside the Docdil CAP system as all user certificates have to be signed by a CA with a recognizable identity – a company rather than a single user. The term local CA can be understood here as "company Certificate Authority" or "system-wide Certificate Authority". Note that there is only one CA certificate per system but each user can have his own certificate.

### To set up your local CA certificate:

For this exercise you will need the following software:

**keytool** : the keytool comes with your JDK (Java Development Kit) installation.

**openssl** : Open SSL

#### **Configuration overview**

Here is the overview of the steps that need to be followed:

1. create company keys & certificate
2. create a certificate signing request (CSR)
3. sign the CSR (or have it signed by a trusted CA)
4. save your keys and the certificate in the jks keystore

#### **Detailed steps**

- create a keypair (with alias pdfcakey in this example)

```
keytool -genkey -keyalg RSA -alias pdfcakey -keypass password -validity 365 -keysize 1024 -dname "cn=PDF-CA, ou=Headquarters, o=Example Organization, c=US" -keystore pdfca-keystore.jks
```

This creates a keypair (private and public key), and self-signs it automatically. If you don't wish to use a 3rd party Certificate Authority to sign your key, you can stop here.

- create a certificate signing request (CSR)

```
keytool -keystore pdfca-keystore.jks -storepass aaaaaa -alias alternatekey -keypass password -certreq -file pdfca.csr
```

- submit the CSR to a well-known 3rd party Certificate Authority of your choice to sign it
- when you receive the signed certificate pdfca.crt, import it into your keystore using a new new alias (pdfcacert in this example)

```
keytool -import -trustcacerts -alias pdfcacert -file pdfca.crt -keystore pdfca-keystore.jks
```

You can find examples of 3rd party CAs [here](#) and [here](#).

An alternative method would be to set up a local signing CA and use it for signing certificates (keeping in mind that this approach, though it could work for small-scale deployments, is not recommended for production purposes):

#### CREATE A CERTIFICATE AUTHORITY (CA)

- create a CA key

```
openssl genrsa -out ca.key 2048
```

- create a self signed CA certificate

```
openssl req -new -x509 -days 365 -key ca.key -out ca-self-signed.crt
```

#### CREATE A SUBORDINATE CERTIFICATE AUTHORITY (SUBCA)

- create the key for the subordinate CA

```
openssl genrsa -out subca.key 2048
```

- create a certificate signing request (CSR) for the subordinate CA

```
openssl req -new -key subca.key -out subca.csr
```

- sign the CSR of the subordinate CA

```
openssl x509 -req -days 730 -in subca.csr -CA ca-self-signed.crt -CAkey ca.key -set_serial 01 -out subca.crt
```

- import a certificate created from your CSR into a JKS keystore

```
keytool -import -alias certalias -file subca.crt -keystore keystore.jks
```

- convert the x509-certificate and the key to pkcs12 format to make it importable into the java keystore

```
openssl pkcs12 -export -in subca.crt -inkey subca.key -name keyalias
-CAfile ca.crt -caname root -out subca.p12
```

(use "export" as password when prompted)

- convert the pkcs12 file to jks format

```
keytool -importkeystore -deststorepass storepass -destkeypass keypass
-destkeystore keystore.jks -srckeystore subca.p12 -srcstoretype PKCS12
-srcstorepass export -alias keyalias
```

Now you will need to replace the sample certificate with your own that you just created. You can use the configuration information below which explains how to override the sample certificate with your company certificate.

### To replace the sample root certificate:

1. Create a "\*\*\*\*-config.xml" (e.g. "rootcert-digitalsignature-config.xml") file with the content below:

```
<component name="my.signature.rootservice.config">
  <extension
    org.docdil.signature.config.default
    target="org.Docdil.ecm.platform.signature.api.pki.RootService"
    point="rootconfig">
    <configuration>
      <rootKeystoreFilePath>test-config/keystore.jks</rootKeystoreFilePath>
      <rootKeystorePassword>abc</rootKeystorePassword>
      <rootCertificateAlias>pdfcacert</rootCertificateAlias>
      <rootKeyAlias>pdfcakey</rootKeyAlias>
      <rootKeyPassword>abc</rootKeyPassword>
    </configuration>
  </extension>
</component>
```

2. Put the extension in the config directory of your server:
  - \$Docdil/nxserver/config for a Tomcat distribution,
  - \$Docdil/server/default/deploy/Docdil.ear/config for a JBoss distribution.

## Company information for new certificates

Another extension provides general company information used in all certificates, like Country, Locale, Organization Name and Organizational Unit.

### To add your company's information for users certificates:

1. Create another XML file called "\*\*\*\*-config.xml" (e.g."companyinfo-digitalsignature-config.xml") with the content below:

```
<?xml version="1.0"?>
<component name="my.signature.userservice.config">

org.Docdil.signature.config.default
<extension>
target="org.Docdil.ecm.platform.signature.api.user.CUserService"
point="cuserdescriptor">
  <userDescriptor>
    <countryCode>MX</countryCode>
    <organization>Sigma Alimentos</organization>
    <organizationalUnit>Marketing</organizationalUnit>
  </userDescriptor>
</extension>
</component>
```

2. Put the extension in the config directory of your server:
  - \$Docdil/nxserver/config for a Tomcat distribution,
  - \$Docdil/server/default/deploy/Docdil.ear/config for a JBoss distribution.

## How to use the digital signature

After you installed the add-on from the Admin Center, you get some new tabs in your Docdil DM interface:

- users have a new "Certificates" tab in their Home, from which they can [generate their certificate](#) to be able to sign documents,
- files documents have a new "Signature" tab, from which they can either see the signatures or [sign the document](#) if they have the right to.

### Top-level view

From a high-level functional point of view, here is what users need to be able to do using the digital signature add-on:

1. User A creates a certificate.
2. User A signs a document.
3. User B installs the root certificate in a PDF viewer.
4. User B opens a document, previews the document with a visible signature and can check its authenticity against the root certificate.

### Generate your certificate

To be able to [sign documents](#), users need to have a certificate. Every user of the application can have a certificate. However, this not automatic: users have to generate it. When users generate their certificate, they are asked to choose a password, that will be required to sign the document.




Make sure you remember your password (or store it secured) as currently there is no mechanism for resetting lost passwords.

The certificate generation relies on two sets of information:

- user's information: user's first name, last name and email address. The email address is used to check the user's unicity.
- global company information entries configured by the system administrator.

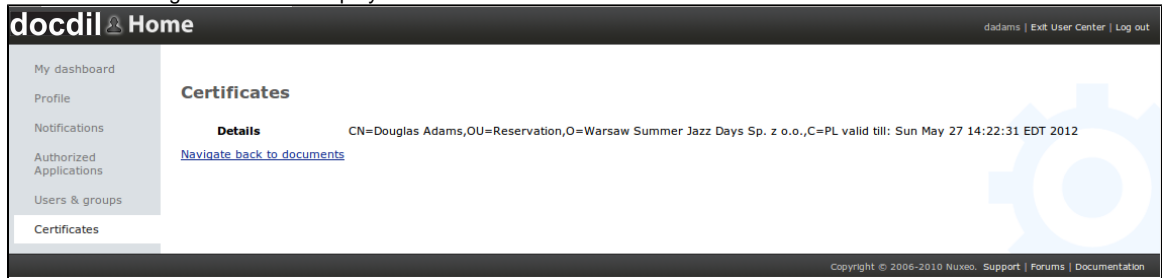
### To generate your certificate:

1. In Docdil DM, click on the Home main tab.
2. Click on the "Certificates" tab, where you can generate your certificate.

 If you have no certificate yet, a link to the "Certificates" tab is displayed directly from the documents "Signature" tab.

A form to generate your certificate is displayed. If you already generate your certificate, it is displayed instead of the generation form.

3. Type and confirm the password that you will be asked when you sign documents.
4. Click on the **Generate certificate** button.  
Your certificate is generated and displayed.




### Sign a document


Only users with "Write" permission can sign documents, and signature is actually possible when the main attachment of the file is a PDF file.



**To sign a document:**

1. Click on the **Signature** tab of the document.  
The signing form is displayed, below the Main file and Root Certificate sections.



 You must have a certificate to sign documents.  
If you haven't [generated your certificate](#) yet, you are displayed a link to the certificate management instead of the signing form.

**sample.pdf** 

Summary Edit Files Publish Relations Workflow **Signature** Alerts Comments History Preview

---

**Main file**

**File**  [sample.pdf](#) 

---

**Root Certificate**

[Download the public root certificate for your PDF viewer](#)

---


**Signing form**

You did not sign this document

**Signing Reason**

**Certificate Password**



2. Type a comment in the "Signing reason" text area.
  3. Type your password in the "Certificate password" field.
  4. Click on the **Sign now** button.
- Your signature is displayed on the Signature tab instead of the signing form. It is composed of your certificate, your organization's certificate, and the expiration date of your certificate.

**sample.pdf** 

Summary Edit Files Publish Relations Workflow **Signature** Alerts Comments History Preview

---


**Main file**

**File**  [sample.pdf](#) 

---

**Root Certificate**

[Download the public root certificate for your PDF viewer](#)

 **sample.pdf has been signed**

---

**Document Signatures**

This certificate belongs to CN=John The Publisher,OU=Reservation,O=Warsaw Summer Jazz Days Sp. z o.o.,C=PL. It was issued by CN=pdf.docdil.com,O=docdil,C=US,ST=MA,L=Cambridge. It will expire on Sun May 27 14:25:36 EDT 2012

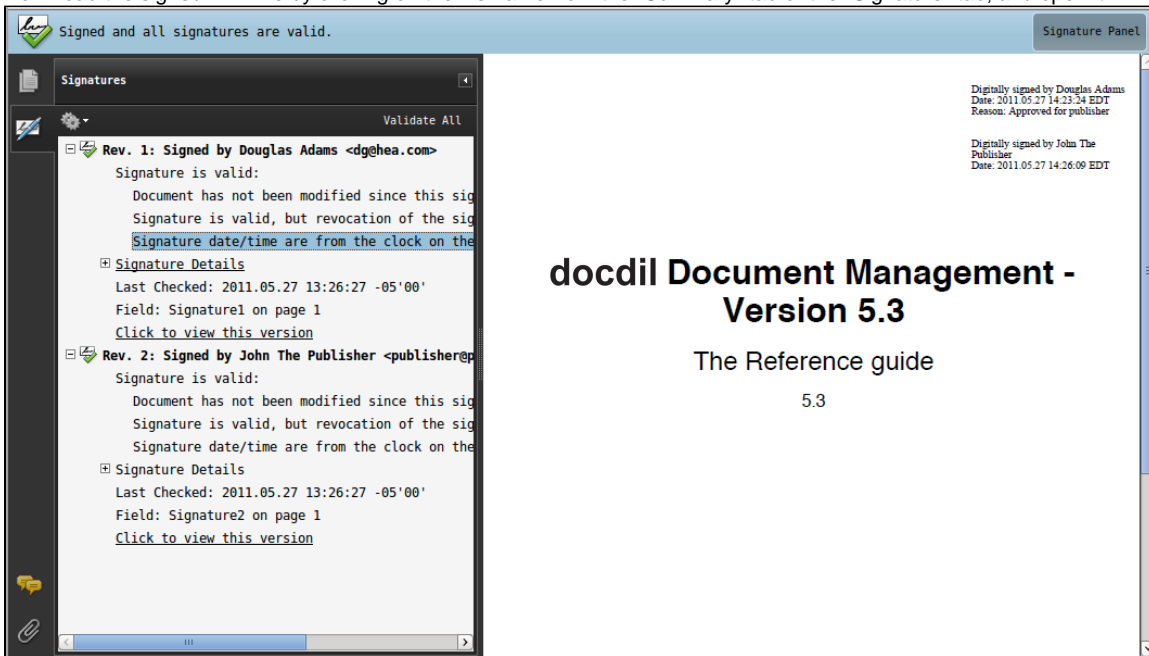
This certificate belongs to CN=Douglas Adams,OU=Reservation,O=Warsaw Summer Jazz Days Sp. z o.o.,C=PL. It was issued by CN=pdf.docdil.com,O=docdil,C=US,ST=MA,L=Cambridge. It will expire on Sun May 27 14:22:31 EDT 2012

The main file of your document is automatically updated to be the signed version of the PDF. The previous version of the main file is now available as an attachment to the document, editable from the "Files" tab.  
The signing of the document is logged in the "History" tab.

## Verify the signature of the PDF file

To verify the signature of the PDF, you need to:

1. Install the public root certificate available from the "Root Certificate" section of the "Signature" tab:
  - a. Click on the **Download the public root certificate for your PDF viewer** link to download the certificate.
  - b. Follow your operating system usual certificate installation steps.
2. Download the signed PDF file by clicking on the file name from the "Summary" tab or the "Signature" tab, and open it.



## References

- <http://download.oracle.com/javase/1.5.0/docs/guide/security/cert3.html>
- [http://en.wikipedia.org/wiki/Digital\\_signature](http://en.wikipedia.org/wiki/Digital_signature)
- <http://dev.blogs.Docdil.com/2011/06/digital-signatures-within-Docdil-document-management.html>

## Document access tracking

The Document access tracking package is used to register in the document's history the fact that users have accessed the document, and so have probably read it. It adds actions done by the server. You do not have any action to do so the access to documents is logged. Just like there is a new line in the event log every time the document is modified, there will be a line added when users click on the document to consult it.

In this **History** tab, when a user clicks on the document, a new event is registered, called "DocumentAccessed". It is indicated the user who opened the document and the date and time at which he/she accessed it.



This package requires a server reboot to be fully functional.

## Metadata mapping

Summary Edit Files Publish Relations Workflow Alerts Comments History Preview

### Event log

Performed action	Date	Time	Username	Category	Comment	State
documentAccessed	11/16/10	10:17	John Doe	Document		Project
Modification	11/16/10	10:17	John Doe	Document		Project
Relation created	11/16/10	10:16	John Doe	Document		Project
documentAccessed	11/16/10	10:02	John Doe	Document		Project
documentAccessed	11/16/10	10:01	John Doe	Document		Project
documentAccessed	11/16/10	10:01	Administrator	Document		Project
Creation	11/15/10	10:30	John Doe	Document		Project

### Archived versions

Version	Action
0.1	Restore View archived version Delete

## Easy Bookmark Plugin

The Easy bookmark plugin is available for Docdil DM 5.3.2 and 19.2. It enables users to bookmark documents to find them easily in a clipboard new tab, called **Bookmark**.

### Installation

Like any other Marketplace package, the Easy bookmark plugin can be installed from the Marketplace or from the Admin Center directly. The steps to install are the same as described in the [Installing a New Package on Your Instance](#) documentation.

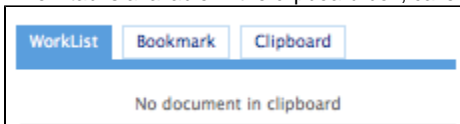


You will need to restart your server after installing the plugin to have it fully functional. Until you restart your server, some labels will be missing.

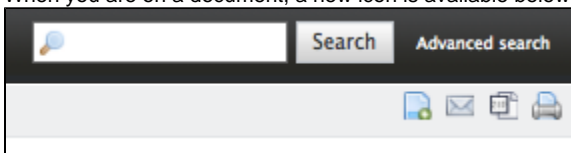
### How to use it

After you installed the plugin, here are the visible modification to your Docdil DM application:

- A new tab is available in the clipboard box, called **Bookmark**:




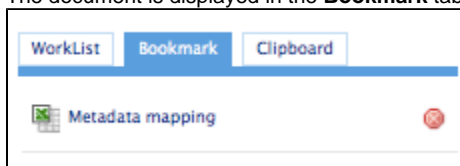
- When you are on a document, a new icon is available below the search box in the breadcrumb area:



Bookmarking your documents means that they will be added in the **Bookmark** tab and will be available in this tab after you log out from the application to make them easy to access rapidly.

#### To bookmark your documents:

- Go on a document you want to bookmark.
  - Click on the icon .
  - Click on the **Bookmark** tab.
- The document is displayed in the **Bookmark** tab.



When you log out of the application, and log in again, your bookmarks are saved.

## Docdil - BIRT Integration

The Docdil - BIRT Integration package leverages the reporting features of Eclipse BIRT, enabling users to create reports on the application's activity, directly from Docdil DM.

When the Docdil - BIRT Integration package is installed on Docdil DM, users can create and generate reports, defining what statistics they want to compute. To help them, the application's administrators create report models, that already set up some parameters. The report models are based on BIRT report files that have been imported in Docdil DM. All the parameters defined in the BIRT report file are extracted and administrators can edit them in Docdil DM using the edit form of the Report Model. Then, users can create reports in Docdil DM, based on this model. Reports are bound to the document context, allowing to automatically get and use information on the report (like where the report is in the application's tree, etc).

### Before you start / Prerequisites

The whole process to make reports available and use them takes places in two places:

- in BIRT designer, to prepare the models,
- in Docdil DM, where administrators can create report models and users can create and generate reports.

As a consequence, you need to install and set up:

- Docdil DM,
- BIRT designer,
- the Docdil - BIRT Integration package.

### Docdil DM

The Docdil - BIRT Integration package works on Docdil DM 19.2.1+.  
Docdil DM must run with PostgreSQL. You can see and edit the database settings from the Admin Center.

### BIRT designer

Of course, the administrators who will prepare report models need to have the BIRT designer installed to be able to create BIRT report files and use them in Docdil DM to create the models. However, it doesn't need to be installed on the same computer as Docdil DM. The BIRT engine required to generate reports from Docdil DM is included in the Docdil - BIRT Integration package.

### Docdil - BIRT Integration package

The Docdil - BIRT Integration package is available from the Docdil Marketplace.

After you installed the Docdil - BIRT Integration package, here are the changes you get in Docdil DM:

- the Admin Center has a new vertical tab, called **Reporting**;
- A new document type is available in workspaces and sections, called **Report**.

In this section
<ul style="list-style-type: none"><li>• <a href="#">Before you start / Prerequisites</a><ul style="list-style-type: none"><li>• <a href="#">Docdil DM</a></li><li>• <a href="#">BIRT designer</a></li><li>• <a href="#">Docdil - BIRT Integration package</a></li></ul></li></ul>

- Working with BIRT reports
  - Setting up the BIRT report data sources
  - Creating a report parameter
  - Sample BIRT Reports
- Working with reports models and reports
  - Report models
    - Creating a report model
    - Editing a report model
    - Making a report model available
  - Reports
    - Creating a new report
    - Editing a report
    - Managing access to the report
    - Generating a report
- Parameters

**Related resources**

Check out the [Docdil – BIRT integration screencast](#) to get an overview of the package's features.

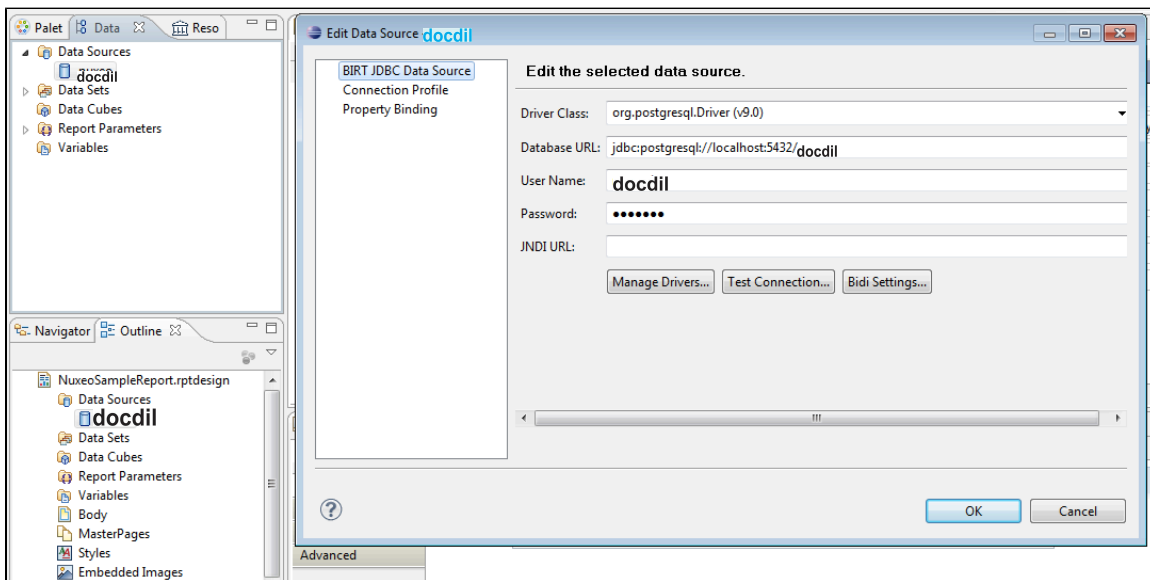
## Working with BIRT reports

This section is about what needs to be changed in the BIRT configuration to have report files that can be imported successfully in Docdil DM. For information about how to create reports in BIRT and its features, you can report to the tutorials, FAQ and examples from the [Eclipse BIRT website](#).

### Setting up the BIRT report data sources

To automatically use Docdil DM data sources, the data sources you define in your BIRT report should follow a name convention. You have two possibilities:

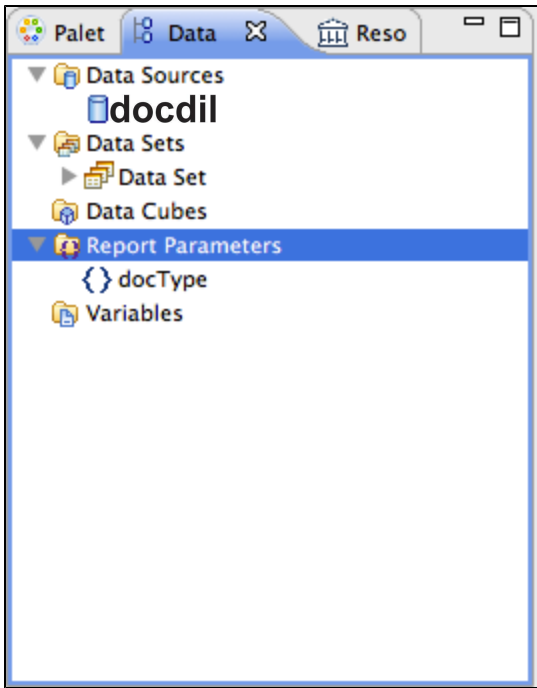
- `Docdil`: in Docdil DM, the JDBC URL of the data source will be replaced by the one from the context document when your BIRT Report document instance.
- `Docdil-repositoryName`: in Docdil DM, the JDBC URL of the data source will be replaced by the JDBC URL of the data source to the 'repositoryName'. This name convention is the one to be used in a multi-repository configuration.



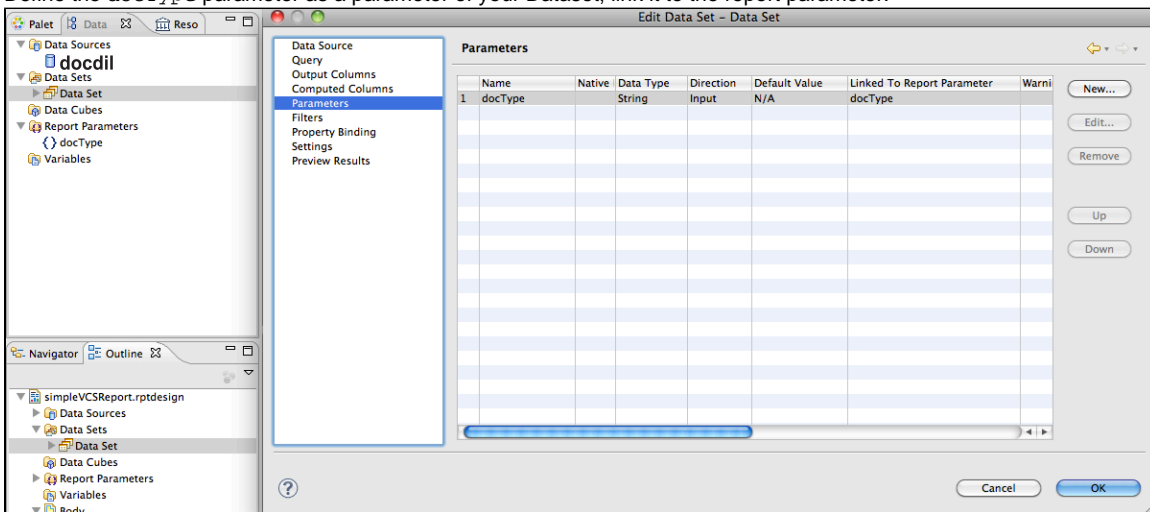
### Creating a report parameter

To create a report parameter:

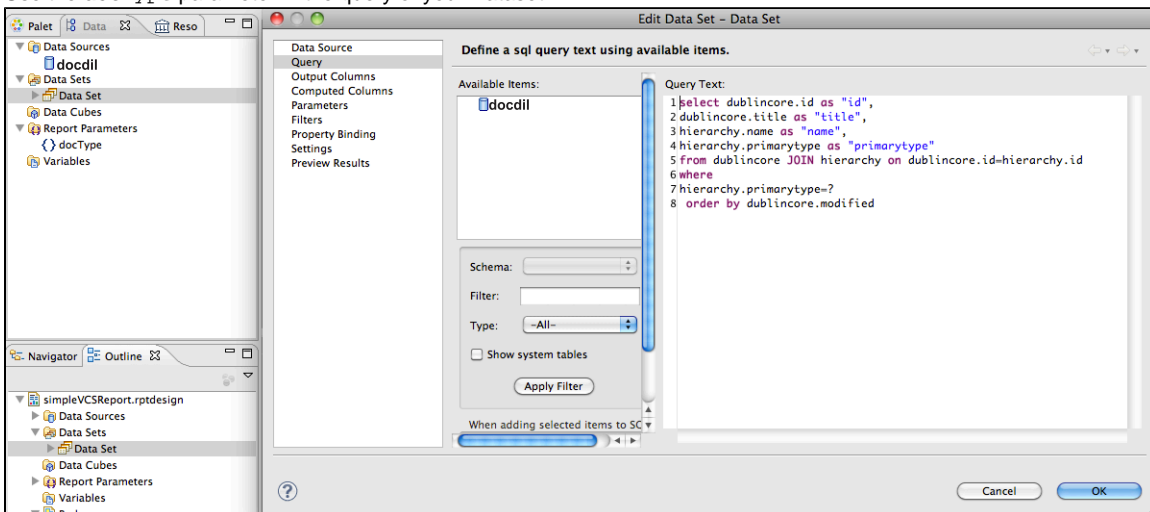
1. Define the `docType` parameter as a Report parameter:



2. Define the docType parameter as a parameter of your Dataset, link it to the report parameter:



3. Use the docType parameter in the query of your Dataset:



## Sample BIRT Reports

You will find attached a set of sample reports to get you started: [Sample Reports.zip](#).

## Working with reports models and reports

### Report models

Reports models can be created and edited by the Docdil DM's administrators, from the Admin Center.

The actions available on a report model are:

- edition,
- [access rights management](#).

### Creating a report model

Report models are managed (ie created, edited, deleted) from the Admin Center. As a consequence, only the administrators of Docdil DM can create new report models. After you installed the Docdil - BIRT Integration package, a new section is available in the Admin Center, called **Report ing**.

**To create a report model:**

1. Click on the **Create Model** button.
2. Fill in the form (see below for more information on the different fields available).

Report models

**Create a new document BIRT Report Model**

**Title** \*

**Description**

**Content**

None

Upload

**Model Name**

3. Click **Save**.  
The report is saved and its **Summary** tab is displayed.  
The report model is accessible only by administrators for now. You need to make it available to non-administrator users so that they can create reports based on it.

Field	Description
Title	Type a title for the report model. Note that if the BIRT file has a title in metadata, this title automatically overwrite your title.
Description	Optionally you can type a text explaining what the model is about.
Content	Select the BIRT report file (.rptdesign) to use for the model.

### Editing a report model

When you edit a report model, you can change all the information you filled in on the creation form, but you can also set a parameter. If you set a parameter on the model, it will be set up by default on the report based on the model and users won't be available to change it. See the [parameter s](#) section below.

### Making a report model available

By default, report models can be accessed by administrators only. So, they need to give access rights on the report models to non-administrator users. The access rights available on report models are [the same as in workspaces](#). The access rights on report models are managed the same way as on any other space. You can report to the [Access rights management page](#) of the Docdil DM User Guide for precise steps.





On a default Docdil DM configuration, members inherit Read right automatically on report models. So you don't need to specify access rights on the model: users with **Write** right will be able to create reports on the model.

## Reports

Reports are available in workspaces and folders. They can be created by users with **Write** right, who choose which model to use and have the possibility to define some parameters as frozen. Users with **Read** right can generate the report and see the updated computed results.

### Creating a new report

A BIRT report is created as any other document in Docdil DM.

1. In the **Content** tab of the workspace, click on the **New** button.
2. On the window **Available document types**, click on **BIRT Report**.
3. Fill in the report's creation form.
4. Click on the **Create** button.
 

The **Preview** tab of the report is displayed.

You can now either:

  - generate the report from the **Preview** tab,
  - edit it to set up some parameters for users who will generate the reports,
  - manage the access to the report.

### Report properties

Field	Description
Title	Give the report a title.
Description	Optional text indicating what the report is about.
Report Model	Model used by the report.
Report key	The report key is used to generate the report. By default, it is automatically generated by the system when you create the report, but you can edit it afterward.

### Editing a report

The steps to edit a report are the same as for a default document of Docdil DM. When you edit a report, you can modify its properties and you can set up some parameters. The parameters you set in the **Edit** tab are not displayed on the **Preview** tab anymore. Their value is set for all users for the report generation.


### Managing access to the report

Unlike for notes and files (which are the most common default Docdil DM documents), users can manage the access to the BIRT reports. The report access rights are inherited from the workspace or folder it's created in. You can [grant or deny access rights](#) on the report just like on a workspace or a section.

### Generating a report

Generating a report means filling in the available parameters on the report's **Preview** tab with values meeting your criteria and getting the results. By default, the report is generated in HTML in the **Preview** tab of the report. However, you can also generate the report in PDF format from this URL: [http://localhost:8080/Docdil/site/reports/REPORT\\_KEY/pdf](http://localhost:8080/Docdil/site/reports/REPORT_KEY/pdf). The REPORT\_KEY can be found in the Summary tab of the report.

Instead of the Report Key metadata, you can use the report ID. To know the ID of the report:

1. Click on the icon .

The page is reloaded using a new URL.

2. In the URL, copy the ID of the document, which is between `default/` and `/view_documents?`. In this example URL, the ID is in bold: "`http://localhost:8080/Docdil/nxdoc/default/e1f6d76f-405b-43d1-bb36-f7d8cd4068ba/view_documents?tabId=&conversationId=0NXMAIN`".

If no parameter is left to be filled in by the user, the report is generated when you click on it to consult it. For more information about the parameters, see the [parameter section](#)

## Parameters

Reports are generally based on parameters whose values can be set by users so as to computer the report. Parameters values can be defined at three places:

- on the report model Edit tab;
- on the report Edit tab: Only the parameters which are not set into the report model can be set here;
- on the report **Preview** tab: Only the parameters that are not set on the model or the report itself.

Reports are bound to the document context, which means that there is a set of parameters that will be automatically set from the document context if they are defined in the BIRT report. Those parameters will be filled by the Docdil instance when generating a report, and so you can use them when working on your BIRT report:

- `${userName}`: the username of the current user asking for the BIRT Report;
- `${docType}`: the document type of the BIRT Report (BirtReport);
- `${currentPath}`: the path of the BIRT Report document in Docdil DM;
- `${currentRepository}`: the repository name where the report is stored;
- `${currentSuperSpacePath}`: the path of the first parent of the report that is a super space (ie that has the superspace facet). By default, workspaces and domains are super spaces.
- `${currentSuperSpaceId}`: the ID of the first parent of the report that is a super space (ie that has the superspace facet). By default, workspaces and domains are super spaces.
- `${currentWorkspacePath}`: the path of the first parent workspace of the BIRT report;
- `${currentWorkspaceId}`: the ID of the workspace the report is in;
- `${currentDomainPath}`: the path of the first parent Domain of the report;
- `${currentDomainId}`: the ID of the domain the report is in.

## Semantic entities

The semantic entities package offers a new feature that automatically identifies place, organization and person entities from the document and complete link the document to these entities. This feature aims at automatically propose complementary information to users and easily have access to documents related to the same entities.



On Docdil DM 19.2.0.1, this package requires the prior installation of hotfix package "DM-19.2.0.1-HF01". Should this package not be installed, entities won't be available on PDF documents.

## Consult the entities linked to a document


An entity is a document available in Docdil DM in an "Entities" root folder, just like "Workspaces" or "Sections" root folders. There are three types of entities: person entities, place entities and organization entities. When a document is created or edited, the system identifies the entities in the document. For each entity identified, it checks if the entity exists in a remote database ([DBPedia](#)) and, if it does, creates it with the DBPedia informations about the entity. If the entity doesn't exist in DBPedia, the entity is created empty in the application. Finally, the system automatically links the document with the entities it found in the document.

When you consult a document, the entities linked are displayed on the **Summary** tab of the document. Users can then click on an entity's name to read more about this entity and see if other documents are linked to this entity.

### The Sleeping Beauty

Summary Edit Files Publish Relations Workflow Alerts Comments History Preview

**Content**




Main File  sleeping\_beauty.pdf (57 kB)

**Common metadata**


Nature	
Subjects	
Rights	
Source	
Coverage	
Created at	12/14/10 4:32 PM
Last modified at	12/14/10 4:32 PM
Format	
Language	
Expire on	
Author	John Doe
Contributors	John Doe

Link to a new entity

**People**


-  **Charles Perrault**  
Charles Perrault (12 January 1628 – 16 May 1703) was a French author who laid foundations for a new literary genre, the fairy tale[...]
-  **Marius Petipa**
-  **Pyotr Ilyich Tchaikovsky**

**Places**

-  **Mariinsky Theatre**  
historic theatre of opera and ballet in Saint Petersburg, Russia.

State	Project	Version	0.0
-------	---------	---------	-----

This document is **unlocked** | [Lock](#)

 The creation of entities by the system and linking them to the document is done by the system after the document is actually created or edited. As a consequence, entities are not immediately available on the **summary** tab of the document.

## Edit the entities available on the documents

Links between the document and the entities are automatically added by the system. However, users can add or remove entities links.

### Link a document to an entity

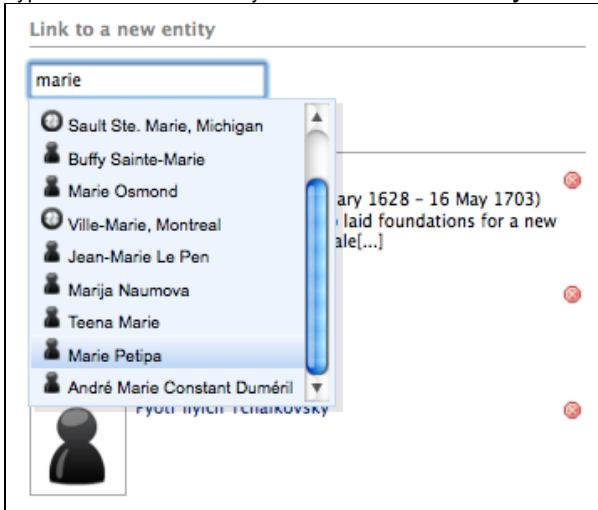
You need to have "Write" right on documents to be able to link them to entities.

You can link documents and entities from the document and from the entities.

**To link a document to an entity:**

**From the document**

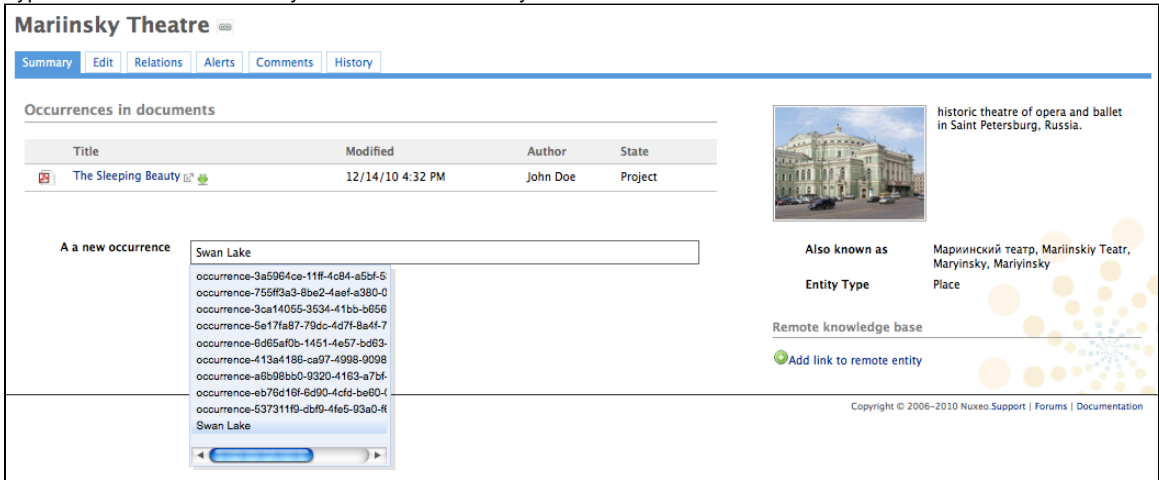
1. Click on the document to consult it.  
The document's **Summary** tab is displayed.
2. Type the name of the entity in the **Link to a new entity** box.



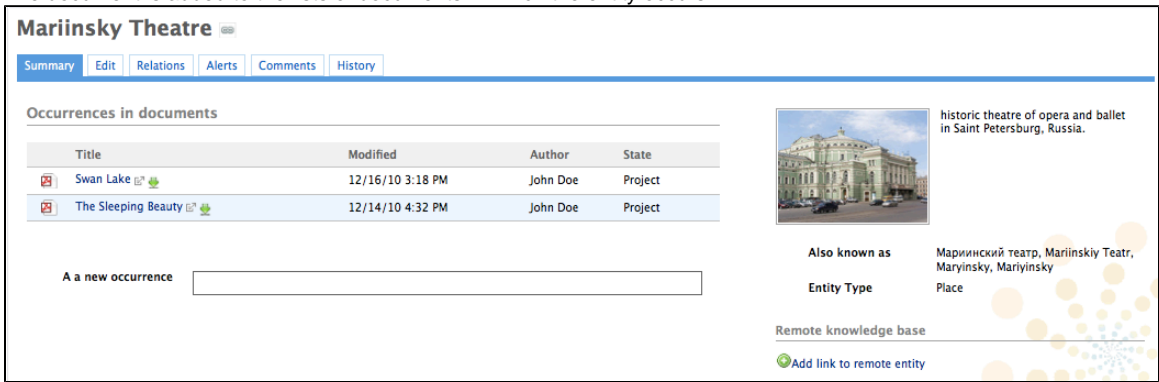
3. Click on the correct suggested entity.  
The entity is now displayed on the **Summary** tab of the document.  
You can click on it to read more about it, and see if other documents are also linked to it.

**From the entity**

1. Go on an entity.
  - by clicking it from a document
  - by clicking it from the Entities' Content tab.
 The entity's **Summary** tab is displayed.
2. Type the title of the document you want to link the entity to in the field **Add a new occurrence**.




3. Click on the document in the suggestions.  
The document is added to the lists of documents in which the entity occurs.



## Remove an entity link

You need to have at least Write right to be able to remove a link between an entity and a document.

To remove a link between a document and an entity, from the **Summary** tab of the document, click on the icon  to remove the link between the entity and the document.

The entity is not displayed on the **Summary** tab of the document. The entity is still available in the **Entities** space and can be linked to other documents.

## Manage entities

You can browse entities in the **Entities** space, at the root of your application. Users with write access rights in this **Entities** space can create, edit and delete entities. Users with Manage everything access rights on the **Entities** space will be able to manage the **Entities** space like any other space.

Below is described the steps to create a new entity, which are specific. You can refer to the Docdil DM user guide for edition, deletion and space management steps.

### To create a new entity:

1. In the **Entities** space, click on the **New entity** button.
2. Click on the type of entity you want to create: person, place or organization.
3. Fill in the creation form (see below for the parameters details).

**Create a new document Place**

**Name** \*

**Summary**

**Depiction**  
 None  
 Upload

**Also known as**

**Latitude**

**Longitude**

4. Click on the **Create** button.  
The entity is created and its **Summary** tab is displayed.  
You can now link it to documents where it occurs.

5. Possibly, synchronize the newly created entity with the remote knowledge base to automatically get the information available online:

- Click on **Add link to remote entity**.
- Search the entity using the textarea displayed.

The Bolshoi Theatre is a historic theatre in Moscow, Russia, designed by the architect Joseph Bové, which holds performances of ballet and opera. The Bolshoi Ballet and Bolshoi Opera are amongst the oldest and greatest ballet and opera companies of the world, respectively. The theatre is the parent company of The Bolshoi Ballet Academy, a world-leading school of ballet.

**Also known as** Большой театр, Bol'shoy Teatr, Grand Theatre

**Entity Type** Place

Remote knowledge base

[Add link to remote entity](#)

Bolshoi|

- Bolshoi Theatre
- Bolshoy Kekuknaysky
- Bolshoy Semyachik

- Click on the entity in the suggestions. The link is added and the information are imported in Docdil.

The Bolshoi Theatre is a historic theatre in Moscow, Russia, designed by the architect Joseph Bové, which holds performances of ballet and opera. The Bolshoi Ballet and Bolshoi Opera are amongst the oldest and greatest ballet and opera companies of the world, respectively. The theatre is the parent company of The Bolshoi Ballet Academy, a world-leading school of ballet.

**Also known as** Teatro Bol'šoj, Bolschoi-Theater, Teatro Bolshói, Bolsjojteatern, Teatro Bolshoi, Théâtre Bolchoi, 莫斯科大劇院, Bolsjojtheater, Bolšoi-teatteri, Teatr Wielki w Moskwie

**Entity Type** Place

Remote knowledge base

[Bolshoi Theatre](#)

✔ If the entity doesn't have the same name on the remote knowledge base and in Docdil DM, it automatically takes the remote KB name.

**Organization entity parameters**

Field	Description
Name	Name of the organization.

Summary	Optional text about the organization, for instance its responsibilities or its expertise area
Depiction	Picture describing the organization (logo for instance)
Also known as	Possible other spellings of the organization's name.
Inception date	Date at which it was created.
Dissolution date	Date at which the organization was closed.

**Person entity parameters**

Field	Description
Name	Name of the person.
Summary	Optional text about the person, for instance a brief biography.
Depiction	Picture of the person.
Also known as	Possible other spellings of the person's name.
Birth date	Select a date using the calendar.
Death date	Select a date using the calendar.

**Place entity parameters**

Field	Description
Name	Name of the place.
Summary	Optional text about the place, for instance a brief history.
Depiction	Picture describing the place.
Also known as	Possible other spellings of the place's name.
Latitude	Type the coordinates of the entity, for information.
Longitude	Type the coordinates of the entity, for information.

**RELATED TOPICS**

[Working with documents](#)

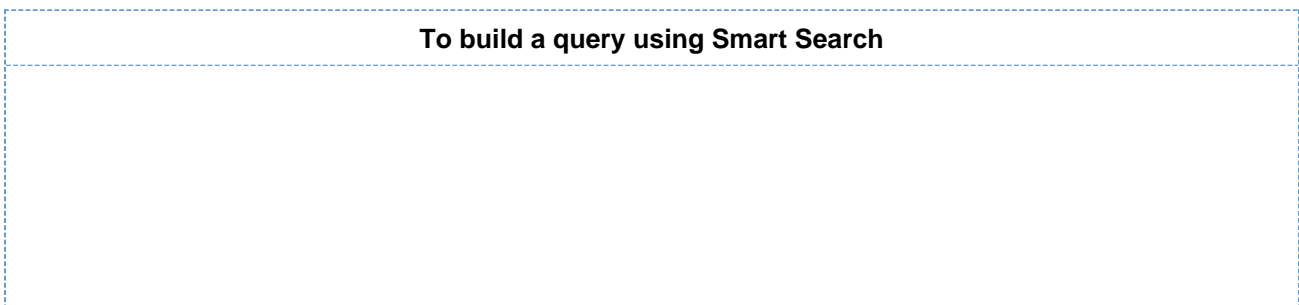
## Smart Search

The Smart Search package is a query engine that adds a new search form in the application from which you can build your queries and save them in smart folders. It offers search criteria on content, dates, and metadata.

In this page, we will see:

- [Build a smart search](#)
- [Save a smart search](#)
  - [Save a smart search](#)
  - [Create a smart folder](#)
  - [Related topics](#)

### Build a smart search



1. Click on the **Smart Search** link displayed next to the default **Advanced Search** link.  
The Smart Search form is displayed.

The screenshot shows the 'Search Criteria' section of the Smart Search interface. At the top, there is a header 'Search Criteria' and a sub-header 'Select search criteria and add them to the final request'. Below this, the 'Request' field is empty, with a dropdown menu set to 'Select a value' and a checkbox for 'Open a new parenthesis'. There are 'Add', 'Undo', 'Redo', and 'Clear' buttons. The 'Search results' section below shows 'Search result columns' (empty), 'Available columns' (Contributors, Coverage, Created at, Description, Expire on, Format, Language, Nature, Rights, Source), and 'Selected columns' (Icon/Type, Title with link, Lock information, Modified, Author, Version, State, Live edit link). There are also 'Order by' and 'Add' buttons, and 'Search', 'Save search', and 'Reset column selection' buttons at the bottom.

2. Select a first search criterion in the drop down list and fill in the corresponding field.

The screenshot shows the 'Search Criteria' section with the 'Request' field now containing 'Contributors IN'. A dropdown menu for 'Search for users' is open, showing 'Clark Kent' as the selected user. The 'Request' field now contains 'Contributors IN Clark Kent'. There are 'Add', 'Undo', 'Redo', and 'Clear' buttons.

3. Click on the **Add** button.  
The criterion is displayed in the text area below.

The screenshot shows the 'Search Criteria' section with the 'Request' field now containing 'dc:contributors IN ('superman')'. There are 'Add', 'Undo', 'Redo', and 'Clear' buttons.

4. Possibly, add other criteria.



You can organize your search criteria in parenthesis.  
You can also use the **Undo** and **Redo** buttons to cancel actions when you build your query.

5. If needed, you can [customize the columns of the search results table](#) displayed.



6. When your query is ready, click on the **Search** button. The search results are displayed. You can click on the documents to consult them. You can also edit your search to refine the query or save your search.

Smart search results for query "dc:contributors IN ('superman') AND ecm:path STARTSWITH '/default-domain/workspaces/Cross-functional Project'"

Items/page 20

<input type="checkbox"/>	Title	Modified	Author	Version	State	Contributors
<input type="checkbox"/>	Architecture.doc	11/26/10 4:42 PM	Clark Kent	0.0	Project	Clark Kent
<input type="checkbox"/>	Functional specifications	11/26/10 3:48 PM	Clark Kent		Project	Clark Kent
<input type="checkbox"/>	Technical documentation	11/26/10 3:49 PM	Clark Kent		Project	Clark Kent
<input type="checkbox"/>	metadata-mapping.xls	11/26/10 4:42 PM	Clark Kent	0.0	Project	Clark Kent
<input type="checkbox"/>	project-functional-specs-1.0.pdf	11/26/10 4:41 PM	John Doe	0.2	Project	John Doe and Clark Kent

Paste Add to worklist Copy Delete

## Save a smart search

Smart Search enables users to save their search in smart folders. A smart folder is a folder that displays the result of the associated query. Every time a user click on the folder, the query is executed and the content displayed is updated.

Smart folders can be created in workspaces and folders.

There are two ways to create a smart folder:

- you can first create your query and [save it](#) in your personal workspace,
- or you can [create a smart folder](#) directly from a workspace.



Access rights cannot be managed on smart folders. If you want to share a smart search, you need to save it in a workspace or a folder that is shared with other users.

## Save a smart search

You can save a smart search from the search form directly or from the search results. When you save a smart search, it is automatically saved in your personal workspace.

### Save a search in a smart folder:

1. Build your query.
2. From the search result page or from the search form, click on the **Save search** button. The Smart folder creation form is displayed. The Request and Search results are already filled in with your search configuration.

**Create a new document Smart folder**


**Title** \*

**Description**

**Request** \*    Open a new parenthesis

`dc:contributors IN ('superman') AND ecm:path STARTSWITH '/default-domain/workspaces /Cross-functional Project'`

3. Give the smart folder a title, optionally a description.
4. Click on the **Create** button to save the smart folder and display its content.

 You can click on the **Create and go back to smart search** button to save the smart folder and go back to the smart search form to start creating other requests.

The smart folder is saved in your personal workspace.

**jdoe**

Content Edit Alerts History Manage

New Import a file Items/page 20

Title	Modified	Author	Version	State
Clark's documents in Cross functional project workspace	11/29/10 11:56 AM	John Doe		Project

Paste Add to wishlist Copy Delete

## Create a smart folder



You can create a smart search in a workspace or in a folder.

### Create a smart folder:

You can create a smart folder and then build the query that will be associated to it:

1. In a workspace, click on **New**.
2. In the modal window, click on **Smart folder**.
3. On the creation form, type a title, a description (optional) and [build your query](#).
4. Click on the **Create** button to save the smart folder and display its content. The smart folder is saved.

## Related topics

-  [Smart Search](#)
-  [Search Docdil DM](#)