

eDMS 1.0.4 Maintenance Manual

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Chapter 1. Introduction

First, we would like to thank you to use eDMS as your Documents Management System. If you need answer to non related subject, please send a mail to edms@no-sod.org.

Who's this manual for?

This manual will guide administrators through eDMS management and will deliver information to easily understand all eDMS maintenance tasks.

How tu use this manual?

Please use the table of contents to find direct access to requested information. By clicking on a (blue) subject title you can navigate through related categories or go back to the table of contents.

Rem: To quickly search items from this Maintenance Manual, hit the CTRL-F keyboard keys to invoke the browser search engine.

Chapter 2. Maintenance

The maintenance can be managed through three different ways:

- Through eDMS itself (internal lists maintenance, locations)
- Through ECP, the NO-SOD main administration module (users, groups)
- Through external processes like RDBMS (audit trail) or file system accesses

For a 'day to day' administration, you can use your eDMS administrator user profile. For 'system' maintenance (outside eDMS), you can do it through ECP but also with your local administrator privileges on your server(s) (e.g. access to the file system to modify a configuration file, RDBMS access to consult the audit trail database,)

Maintenance through eDMS

The eDMS web interface allows administrators to manage locations and some of the application's drop down lists.

Locations management

Sometimes, you will have to manage folders and/or file cabinets where documents are stored into the eDMS system.

The locations management (LOCATIONS green button) is accessible from the welcome screen (displayed by default just after the logon session). To display this screen again at any time, just click on the eDMS logo at the top left of the browser window.

Rem: For security reasons, only eDMS administrators have privilege to manage the locations. If a user is not part of this group of users, he'll just not see the LOCATIONS button.

First, you have to give your electronic signature to the system to validate your user profile. If your signature is correct, the location screen (divided in three parts) will be displayed:

- Location: displays the current selected file cabinet and folder
- Folders: to add, delete or rename a folder
- File Cabinets: to add, delete or rename a folder

To validate any operation on locations, you'll have to give your password to ensure that you have privileges for this operation.

Folders and file cabinets are managed by the same way:

- NEW: depending of the current location (check this information at the top of the main area), give a folder (or file cabinet) name and click on the NEW button. The left navigation tree will be automatically refreshed with the new folder (or file cabinet). This new item will be created at the same level of the current file cabinet location.
Rem: When you create a new folder, a file cabinet is automatically created with the same name as your username. As two file cabinets cannot have the same name, we suggest you to rename this file cabinet with a most appropriate name.
- DELETE: regarding the displayed folder path or file cabinet's name, click on the checkbox at the left of the DELETE button and click on the DELETE button to effectively delete the folder or

file cabinet.

Rem: To delete a folder, all file cabinets into this folder must be empty. If you decide to delete the file cabinets, when you delete the last empty file cabinet of a folder, this folder is automatically removed also (because a folder needs at least one file cabinet).

- **RENAME:** depending of the current location (check this information at the top of the main area), give a folder (or file cabinet) name and click on the **RENAME** button. The left navigation tree will be automatically refreshed with the new folder (or file cabinet) name.

Rem: An automatic timeout is activated for this section and will go back to the previous screen after a too long non activity period time.

We suggest you to **NOT** apply locations modifications (like delete) during working hours because if there is no lock for locations on a specific folder, all documents that are uploaded or moved at this moment will be losts!

eDMS maintenance

The maintenance screen lets you to manage some drop down lists used at document creation time or for the document's workflow.

Rem: For security reasons, only eDMS administrators have privilege to maintain the application. If a user is not part of this group of users, he'll just not see the **MAINTENANCE** button.

Information that you can easily manage from the maintenance are:

- Document properties (workflow)
- Document types
- Document infos

From all sections, you can **CREATE** new items or **DELETE** current items.

Once you have made all modifications required (for all sections), click on the **SAVE** button (at top or bottom of the main area) to apply modifications into the system or click on the **CANCEL** button to not save modification(s) on the system.

- **Properties**
Current properties installed into the eDMS system are displayed in the properties table. From this table, you can select one or more properties by clicking on the checkbox in front of each property that you want to delete and then click on the **DELETE** green button.

You can also create new properties by giving following information:

- **New property:** name (code) of the new property.
- **Description:** brief description of the property.
- **Edition:** edition group. This group is managed by the administrator from the external ECP application, the NO-SOD main administration module.
- **Check:** check group. This group is managed by the administrator from the external ECP application, the NO-SOD main administration module.
- **Validation:** validation group. This group is managed by the administrator from the external ECP application, the NO-SOD main administration module.

Once you have entered all data regarding this new property, click on the CREATE green button to add this property into the system.

Rem: Don't forget that all the modifications you apply for the properties will be effectively pushed into the system only if you click on the SAVE button (at the bottom of the main area). When you click on a DELETE or CREATE button, information are stored in memory only but not physically into the system.

The Properties table will be automatically refreshed after you delete or create an item.

- Types
Current document's types installed into the system are listed in the Types drop down list.

To delete one of them, select the type you want to delete from the list and click on the DELETE green button.

To add a new document's type:

- Give the type name
- Enter a brief description of the new document's type
- Click on the CREATE green button

Rem: Don't forget that all the modifications you apply for the types will be effectively pushed into the system only if you click on the SAVE button (at top or bottom of the screen). When you click on a DELETE or CREATE button, information are stored in memory only but not physically into the system.

The Types list will be automatically refreshed after you delete or create an item.

- Infos
Current document's infos installed into the system are listed in the Infos drop down list.

To delete one of them, select the info you want to delete from the list and click on the DELETE green button.

To add a new document's info, give the new info name and click on the CREATE green button.

Rem: Don't forget that all the modifications you apply for the infos will be effectively pushed into the system only if you click on the SAVE button (at the bottom of the screen). When you click on a DELETE or CREATE button, information are stored in memory only but not physically into the system.

The Infos list will be automatically refreshed after you delete or create an item.

Sessions

At any time, administrators can measure the sessions system load by checking the session number displayed in the application's window title bar. By comparing this session number with the total sessions number (slots) fixed at setup time, administrators can 'evaluate' the system load and, eventually, increase the number of sessions (slots) into the system.

Maintenance through ECP

The Electronic Check Point (ECP) application is the main NO-SOD administration module. It allows administrators to manage users and groups for each of the installed NO-SOD modules.

User profiles

When you create a new user (via the ECP, the main NO-SOD administration module), you'll have to give him/her a user profile that will define the privileges that the user will receive:

- User: user can access documents without edition access
- Document Manager: user can create document and manage document locations
- Administrator: user can access the maintenance

Rem: From eDMS, the user profile is always displayed on the title bar of your browser window.

Please check the ECP User Manual for more information about how to manage users and groups.

Maintenance through external processes

Some fonctionnalités are, for the moment, only available through external processes. Future implementations will allow administrators to easily manage those kinds of information through powerful GUI's.

Audit Trail

The NO-SOD Framework integrates a complete Audit Trail System. In case of problem with any eDMS fonctionnalités, the administrator should first check information generated by the audit trail system.

The audit trail consists of an audit trail database (called NSDTRAIL) which includes two specific tables:

- NSDOTRAIL: to track all objects called (with codes reference)
- NSDTRAIL: to track all transactions

Rem: Please check the eDMS Installation Manual to know where to find the audit trail database.

Data inside the audit trail tables are structured with a specific syntax that integrates codes to easily debug which action has been done on which document.

- Audit Trail for documents:
The syntax is object = EZE:DOC(code) document id where document id is the unique document number and code is:
 - S for Bad Signature
 - N for New document
 - I for Checkin
 - O for Checkout
 - D for Delete
 - U for Undelete
 - M for Modify / Change Data
 - L for Document's location move

- A for Document approved
- R for Document rejected
- Audit Trail for locations:
The syntax is object = EZE:LOCFOLD(code) for folders management and object = EZE:LOCFCAB(code) for file cabinets management where code is:
 - A for Added
 - R for Renamed
 - D for Deleted
- Audit Trail for maintenance:
The syntax is object = EZE:MAINT(code) where code is:
 - P for Property
 - T for Type
 - S for Bad Signature

Maximum file size for upload

The maximum file size for upload is managed through a parameter found in an external file called php.ini

Rem: Please check the Installation Manual to find the path to this configuration file.

To modify this value, edit the php.ini file with your favourite text editor and check the 'upload_max_filesize' parameter. Then modify the value associated to this parameter as your convenience.

Rem: Please note that the unit for this value is Megabytes.

Chapter 3. Advanced fonctionnalités

Electronic Signature

eDMS contains an Electronic Signature system that will be used to authenticate the identity of the user that would like to execute an action for which Electronic Signature (esig) is required.

Each time eDMS will activate the esig, you'll have to give following information to the system:

- Username: Your username that you have used to enter into the system
- Password: Your NO-SOD password that you have used to log into the NO-SOD Center
- Reason: A brief explanation that should describe why you would like to execute a specific operation

The Electronic Signature is required for any edition screens (when you have to apply some modifications or for any new documents pushed into the system)

Session timeout

By default, a session timeout process is provided with the NO-SOD Framework to avoid a too long inactivity period time and to ensure that the user in front of the computer is still the same... It will be activated as long as a user open a new session (from the NO-SOD Center to each eDMS screen)

Please check the NO-SOD Installation Manual to know how to manage the activation delay of this timeout process.

Chapter 4. Prints

From this version you only have the possibility to print the manuals available from the eDMS interface (User Manual and Maintenance Manual).

How to print a manual?

To print a manual, use the menubar on top of the manual window:

- Click on the 'File' menu option
- Select the 'Print...' option
- Select the appropriate printer
- Check the settings regarding your print preferences
- Click on the 'Print' button

Rem: Please check your hardware or ask your administrator for any printer problem.

Chapter 5. Known bugs

Please find below a known bugs list that should be solved from next release:

Sort on checkin date instead of document's name: If you decide to manage the locations without selecting a location before, when you click on the tree (once you are logged into the locations screen), the system will not update folder and/or file cabinet information but go back to the normal view.

Chapter 6. Frequently Asked Questions (FAQ)

- 6.1. Each time I open a new browser window, at the logon screen, I have a tag 'HTML>' at the top left of my screen? How can I remove it?

You have to modify a PHP parameter from the php.ini file. Check the session.use_trans_sid parameter. The value associated to this parameter is probably set to 1 and should be set to 0. Stop/start your web server and try again..

Chapter 7. Appendices

How to contact the NO-SOD Team?

You can contact the NO-SOD team by multiple ways:

- By sending a mail to our general mailbox at info@no-sod.org
- By visiting our website at <http://www.no-sod.org>