

# **eDMS 1.0.4 User Manual**

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# **eDMS 1.0.4 User Manual**

by Philippe Bresoux and Stephane Van de Putte

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# Table of Contents

1. Introduction .....	1
What's a Documents Management System? .....	1
Who's this manual for? .....	1
What do you need? .....	1
How to use this manual? .....	1
What's new in this version? .....	1
Getting started the quick way .....	2
2. User interface .....	3
The browser window .....	3
The title bar .....	3
The window buttons .....	3
The message bar .....	3
The eDMS interface .....	4
The top area .....	4
The message area .....	4
The search area .....	4
The tree area .....	4
The menu area .....	4
The data area .....	5
3. Document flow .....	6
4. Display documents list .....	8
Two different views .....	8
The table (list of documents) content .....	8
The paging .....	8
View a document .....	9
Document's details .....	9
5. The integrated search engine .....	14
Global mode .....	14
File Cabinet mode .....	14
6. Add a new document into the system .....	15
Step 1: document's information .....	15
Step 2: document's content (upload of the physical file) .....	16
7. Advanced fonctionnalités .....	18
User fonctionnalités .....	18
Electronic Signature .....	18
Control and Validation .....	18
System background fonctionnalités .....	18
Version robot .....	18
E-mails notifications .....	19
8. Prints .....	20
How to print a manual? .....	20
9. eDMS Maintenance .....	21
Locations management .....	21
Drop down lists management .....	21
10. Well known bugs .....	22
11. Frequently Asked Questions (FAQ) .....	23
12. Next releases .....	24
13. Appendices .....	25
Appendix 1: Menu button's availability .....	25
Appendix 2: User profiles .....	25
Appendix 3: List of documents status .....	26
Appendix 4: How to contact the NO-SOD Team? .....	27

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## List of Tables

3.1. eDMS options availability and document flow .....	6
4.1. List of possible actions on a document .....	10
13.1. Appendix 1: Menu button's availability .....	25
13.2. Appendix 3: List of documents status .....	26
13.3. Document flow rules .....	27

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# Chapter 1. Introduction

First, we would like to thank you to use eDMS as your Documents Management System. This user manual may contain some spelling mistakes, non associated links or non clearly described information. If you need answer to non related subject or would like to update one or more parts of this user manual, please send a mail to [documentation@no-sod.org](mailto:documentation@no-sod.org).

## What's a Documents Management System?

Electronic Documents Management Systems are programs, procedures and/or software that manage, control and provide access to electronic documents. Important functions performed by EDMS systems include:

- Version control of documents
- Enabling collaborative work (e.g. holding documents in a common, controlled space for group of users to work on together)
- Indexing of documents for easy retrieval
- Providing some access and change control on documents (e.g. providing a structure within which permissions to view and / or alter documents can be put in place).

## Who's this manual for?

Anyone who works with eDMS. This manual has been created to give you concrete information to help you to navigate through this Efficient Documents Management System. Rem: For information about the eDMS maintenance, please read the Maintenance Manual.

## What do you need?

In order to run this application, you only need:

- A client (workstation, laptop, ...) with a web browser correctly installed
- A username, a password and an URL (given by your system administrator)

## How to 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 User Manual, hit the CTRL-F keyboard keys to invoke the browser search engine.

## What's new in this version?

You'll find below all the new functionalities that have been implemented into this new release of eDMS. Some bugs have been corrected regarding the feedback we have received from a lot of eDMS users via our open forums:

- New 'folder' and 'file cabinet' icons are used from the navigation tree to avoid misunderstanding between folders and file cabinets. Please check the symbols eDMS page for more information

about those new icons.

- New 'expired and checked out' status icon used for a document's flow. Please check our symbols eDMS page for more information about this new icon.
- Backward document's version retrieval is from now avoided for an expired document's version.
- It's not possible anymore to delete the last folder/file cabinet from the navigation tree. You must at least have one folder/file cabinet to be able to use the navigation tree.
- A new 'none' property has been defined (no specific flow for a document) and is used by default for every document checkin.
- A new 'nobody' access right has been defined (only the document's owner will have authorities on a document) and is used by default for every new document checkin.
- The document' flow has been completely validated.
- The document's types field has been fixed to four characters.
- Some new application icons have been added into the system (for automatic application type recognition): .MP3, .OGG and .RTF
- The maintenance manual is from now accessible also from the locations management application page.
- The system is IN18 compliant and may be translated easily
- The manuals are written in Docbook standard format
- The search filter uses both key words and description field
- A new line and CR control characters have been set in the SMTP (email) process for compliance

Thank you very much for your support !

## Getting started the quick way

To start eDMS, open your web browser and type the URL given by your administrator. If this is the correct URL, the NO-SOD Center (logon) should be displayed on your screen. Type your username and password, select the eDMS module and click on the ENTER button. If your username and password are the good ones, the eDMS web interface should be displayed.

Rem: Please contact your system administrator for logon problems

From now, you can start using eDMS. Expand the left tree to retrieve your documents or click on a file cabinet to add a new document into the system...

Rem: We suggest you to bookmark the URL to not have to type it each time you would like to run eDMS.

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# Chapter 2. User interface

To help you to efficiently manage your documents, eDMS has been built to give you a 'user friendly' full graphical web interface where options and functionalities are logically and dynamically placed on the screen.

## The browser window

As browser based application, the eDMS interface contains most of the ingredients you can find on any other browser window (like when you surf on the Internet). Some of them have been removed for security reason. That's why you'll only see from the main eDMS window the title bar, the top right window buttons and the message window (at the bottom).

### The title bar

The tile bar is only used to display some interesting information regarding an eDMS session:

- The application name: eDMS.
- The current session number: as eDMS is a multi-session web application, it may be interesting to know which session you are currently running on (e.g. your administrator can ask you which session you are running on to try to help you by tracking what's going wrong).
- The username: this information lets you exactly know who is currently logged into the system on a specific screen (as you could have more than one username to log into the system).
- The user profile: please check the user profiles section for more information about eDMS user profiles.
- The browser name: (not with all browsers) displays the name of the browser you are currently using.

Rem: even if eDMS is compatible with most of the common browsers available on the market, this application has been tested for Internet Explorer (version 5.x and later)

### The window buttons

Two of the three window buttons are accessible from eDMS:

- Minimize: Click on the first (left) window button to minimize the eDMS window. Click on the minimized window icon again (generally at the bottom of the screen, near the start menu) to re-display the eDMS main window in full screen mode.
- Close: As this button is generally provided to close a window, we suggest you to NOT use this button but instead to use the EXIT icon (from the top area) to properly close the window AND close your open session.

### The message bar

The window message bar (at the bottom of the window) is used to give 'general' information to the user. Depending on the screen you are currently viewing, contextual help may be displayed into this message bar.

Rem: Please note that 'system' messages are displayed into the message area (before or after specific user actions).

# The eDMS interface

The eDMS interface contains six main areas. Some of them are always on screen while others are partially displayed depending of the context. The areas are:

## The top area

Some interesting information are available from this section. The current release of eDMS is displayed at the right of the screen. You can also have access to this online help by clicking on the brown book. In order to leave this application, please use the EXIT icon instead of directly closing the browser window. By this way, your current eDMS session will be properly closed by the system. If you want to go back to the welcome screen, you can also just click on the eDMS logo (at the top left of the screen). We'll see that this option will be used by the search engine to browse all the folders on the system... To check if you have the latest version of eDMS installed on your server, you can check the last status of NO-SOD products by clicking on the hyperlink of the NO-SOD Project: it will open the NO-SOD website in a new window in order to leave your working session intact.

## The message area

Sometimes, the system will send some useful messages. Two kinds of messages are displayed: common information messages in green and critical error system messages in red. Please take care of critical messages! They are delivered in order to help you to detect system anomalies and/or user mistakes.

## The search area

The integrated search engine gives you the possibility to search documents via keywords. Keywords are part a any document pushed into the system. We encourage you to use keywords every time you push documents into the system, this is the easiest way to retrieve your data through thousands of documents in only one mouse click! Please check search related help form more iformation about how to use efficiently the integrated search engine system.

## The tree area

Documents in eDMS are stored into file cabinets. File cabinets are stored into folders. To visualize the structure of all documents locations, a tree is dynamically generated containing all file cabinets and associated folders created on the system. To display documents stored into a file cabinet, select the folder (by clicking on the folder's icon or on the folder's name) containing this file cabinet and then select the file cabinet (by clicking on the file cabinet's icon or on the file cabinet's name). The content of this file cabinet is automatically displayed in the data area. Please check the locations management information available (for system administrators only) from the maintenance manual.

Rem: You cannot delete the last folder/file cabinet.

## The menu area

Depending on which srceen you are woking with, some buttons will be available. Those buttons lets you navigate through the eDMS fonctionnalités:

- NEW: To create a new document.
- NORMAL VIEW: To display all non deleted documents from a specific file cabinet.
- DELETED VIEW: To display all deleted documents from a specific file cabinet.
- LOCATIONS: To manage folders and file cabinets.
- SYMBOLS: To display all icons (status and applications) with their respective signification.

- **CHANGE DATA:** To modify data of a document already pushed into the system.
- **VIEW HISTORY:** To display all versions (releases) of a specific document.
- **DOC LOCATION:** To modify the location of a specific document.
- **MAINTENANCE:** To access the management utility.
- **DELETE:** To delete a document already pushed into the system.
- **UNDELETE:** To undelete a document already pushed into the system.
- **CHECK IN:** To upload a new version of a document (after a check out)
- **CHECK OUT:** To work on a document and apply modifications before to push a new version of the same document.
- **ABOUT:** To display information about eDMS developers and releases history.

Rem: Please note that all the menus are dynamically build depending of the application's context. All buttons are not available from all screens. Please check the crosstable for button's availability.

## The data area

This is your working area. All data regarding the application's flow and the selections you make are displayed into this area.

# Chapter 3. Document flow

The information below briefly describes the lifecycle of a document pushed into the eDMS system.

- Put a new document into the system: The document is **UPLOADED** by a user from a file system (workstation, server, ...) into the eDMS system. After the first upload, all document's activities will be tracked.
- Document pending or directly available: Depending on the start date, the document will be **PENDING** (if the start date is older than the current date) or **AVAILABLE** (if no start date has been specified).
- Control and validation processes: If the document needs to be controlled, it will be locked as **WAITING FOR CONTROL**. Once the controller assigned for this document decides if the document is acceptable or not, the document will be released as **WAITING FOR VALIDATION** (for validated control) or as **REJECTED AT CONTROL** (for non validated control). If the document needs to be validated, it will be locked as **WAITING FOR VALIDATION**. Once the validator assigned for this document decides if the document is acceptable or not, the document will be released as **AVAILABLE** (validated) or as **REJECTED AT VALIDATION** (not validated).
- Put a new release into the system (check out/check in): If a new version of the document must be uploaded into the eDMS system, the previous document version must be first **CHECKED OUT**. Then you can apply modifications on the document before to **CHECK IN** the document again into the eDMS system. For critical documents, the control and/or validation process will be applied after each new checkin of a document.
- Delete a document: If a user decides to not use a document anymore, he/she can **DELETE** this document.
- Expired document: If an end date has been set at document creation time, and if this date is reached, then the document will be set as **EXPIRED** by the system.

Rem: At any time, the document can be modified (data, location, ...).

Table below displays the eDMS options availability regarding your user's category and the document status:

**Table 3.1. eDMS options availability and document flow**

	AVAIL ABLE	CHEC KED OUT	DE- LETE D	LOCK ED	WAIT- ING CON- TROL	WAIT- ING VAL- IDA- TION	RE- JEC- TED CON- TROL	RE- JEC- TED VAL- IDA- TION	PENDI NG	EX- PIRED
CHAN GE DATA	O	O					O	O	O	O
VIEW HIS- TORY	OECV W	OECV W	OD		OECV	OECV	OECV	OECV	OECV W	OECV W
DOC LOCA- TION	O						O	O	O	O
DE- LETE	OD						OD	OD	OD	OD
CHEC K OUT	OEW						OEW	OEW	OEW	OEW

	AVAIL ABLE	CHEC KED OUT	DE- LETE D	LOCK ED	WAIT- ING CON- TROL	WAIT- ING VAL- IDA- TION	RE- JEC- TED CON- TROL	RE- JEC- TED VAL- IDA- TION	PENDI NG	EX- PIRED
CHEC K IN		#OEW								
VIEW	OECV R	OECV R	OD		OECV	OECV	OECV	OECV	OECV W	OECV W
DOWN LOAD	OECV R	OECV R	OD		OECV	OECV	OECV	OECV	OECV W	OECV W
UN- DE- LETE			OD							
CON- TROL					C					
VAL- IDA- TION						V				

Legend:

- O: Owner
- E: Editor
- C: Controller
- V: Validator
- R: Reader
- W: Writer (publisher)
- D: Deleter
- #: Only one option at the same time

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# Chapter 4. Display documents list

Once you have selected a file cabinet from the navigation system (the tree at the left of the screen), the system displays his content into the data area.

## Two different views

Two different views are available: the normal view and the deleted view:

- The normal view will display all documents (stored into a selected file cabinet) with a status different from deleted.
- The other mode, the deleted view, will display all documents (stored into a selected file cabinet) with a status equal to deleted.

## The table (list of documents) content

The content of the table is the same for the two views:

- **VIEW:** To directly view the content of the document into the main area of the eDMS application.
- **NAME:** The document's name (given by the user at creation time).
- **TYPE:** The document's type is set from a drop down list where the content is managed by the eDMS administrator from the maintenance screen.
- **APPS:** The eDMS system can also indentify recognized applications with their respective icons. When the application is non standard or non recognized by the system, an unknown icon is displayed on the table.  
Rem: You can obtain a complete list of recognized applications with their respective icons by clicking on the **SYMBOLS** button from the menu.
- **PROPERTY:** Users can define document's attributes to specify an internal flow. Those attributes (from a dropdown list) are managed from the maintenance screen.
- **STATUS:** The current status of the document (regarding his flow) and his last version number (depending on the number of releases that have been checked out/in for this document).
- **LAST CHECKIN DATE:** The last document's update date (after the first push or after a document's modification).
- **OWNER:** The first person that has pushed the document into the eDMS system.
- **QUEUED:** When the following document's version is in preparation or, for example, waiting for validation, the next version number and status (of the next version) will be shown.

## The paging

A paging option can be used to split file cabinet's content into multiple screens. To switch from page to page, click on the Previous Page or Next page link on top and bottom of the table. The current file cabinet and page number is also displayed near the table.

Rem: The number of rows has been fixed to 15 for this version. Please check the next releases section for more information about how this parameter will be managed from next eDMS release.

## View a document

From this table you can:

- Click on a document's name to display the document's details (please check the next releases section for future implementation of this feature).
- Directly visualize a document's content by clicking:
  - On the blue eye icon (at the left of the table) to directly visualize the document's content (if you have READ access on this document)
  - On the red eye icon (at the left of the table) to directly visualize the document's content (if you have READ access on this document). The red eye indicates that you also have the EXECUTE privilege. This means that you have the authorities to execute the content of the document (eg a Software Operating Procedure)

## Document's details

Depending on your user privilege for each document, you may have (or not) access to some options from the document's details screen. Useful information are displayed on the document's details table:

- **DOCUMENT LOCATION:** The current location (the path to the file cabinet) of the document
- **NAME:** The name of the document.
- **TYPE:** The type of the document. Please check the eDMS maintenance section for more information about how to manage document's types.
- **DOCUMENT OWNER:** The owner of the document.
- **READ ACCESS:** Users group that have READ access for this document
- **WRITE ACCESS:** Users group that have WRITE access for this document
- **EXECUTE ACCESS:** Users group that have EXECUTE access for this document
- **DELETE ACCESS:** Users group that have DELETE access for this document
- **GENERAL DESCRIPTION:** The description of the document.
- **VERSION:** The version of the document (active or not).
- **FORMAT:** The file format of the physical file (attached to the document) with the file name.
- **RELEASE OWNER:** The owner of the last release checked in.
- **PROPERTY:** Document's property regarding the internal flow (please check the Maintenance Manual for documents properties management).
- **STATUS:** Current document's status.
- **CHECK IN DATE:** Date of the last release check in for this document
- **START AT:** The start date of the document.
- **EXPIRE AT:** The end date of the document.

- **RELEASE DESCRIPTION:** The owner of this version of the document.
- **KEYWORDS:** We encourage you to specify one or more keywords associated to each document you push into the system. This information will be very useful when you'll try to retrieve this document by using the integrated search engine.
- **INFOS FIELDS:** Depending on what you have defined in the eDMS maintenance, one or more info fields can be filled in while document checkin process. The content of those fields can be accessed from the document's details screen.

Rem: To add more than one keyword for a same document, you must separate your keywords with a blank character (space). A lot of possible actions are available from the document's details screen:

**Table 4.1. List of possible actions on a document**

Option	Description
CHANGE DATA	<p>To change some data of the current document:</p> <ul style="list-style-type: none"> <li>• Description</li> <li>• Authorities</li> <li>• Infos</li> </ul> <p>The document's name, type and version are displayed only for information.</p> <p>Rem: Only document's owner can modify the document's property. It's under his/her own responsibility to choose an appropriate document's flow (defined by the document's property). If you're not the owner of a document, the property drop down list will only contain the current document's property.</p> <p>Then:</p> <ul style="list-style-type: none"> <li>• Give your username, password and a brief description that should explain why you would like to modify data for this document (electronic signature)</li> <li>• Click on the SAVE button to apply modifications or on the CANCEL button to go back to the document's details screen</li> </ul>
VIEW HISTORY	<p>To display the list of all different releases attached to a document. From this screen you can:</p> <ul style="list-style-type: none"> <li>• VIEW or DOWNLOAD previous release (other than the active one)</li> <li>• Access to DOCUMENT DETAILS for the current active version</li> </ul> <p>Rem: Because access privileges are stored at the 'master record' level (and not for every docu-</p>

Option	Description
	<p>ment's versions), the blue/red eye icon has been here replaced by a black eye icon.</p> <ul style="list-style-type: none"> <li>• Give your username, password and a brief description that should explain why you would like to modify data for this document (electronic signature)</li> <li>• Click on the SAVE button to apply modifications or on the CANCEL button to go back to the document's details screen</li> </ul>
DOC LOCATION	<p>To modify the location of the current active document version:</p> <ul style="list-style-type: none"> <li>• Give your username, password and a brief description that should explain why you would like to modify the location of this document (electronic signature)</li> <li>• Click on the left tree to locate the new file cabinet which will contain the document</li> <li>• Give your username and password</li> <li>• Enter a brief description that should explain why you would like to move this document</li> <li>• Click on the SAVE button to modify the location or on the CANCEL to not apply the modifications</li> </ul>
NORMAL VIEW	<p>To go back to the list of documents of the current selected file cabinet</p>
DELETE	<p>To delete the current active version of a document:</p> <ul style="list-style-type: none"> <li>• Give your username, password and a brief description that should explain why you would like to delete this document (electronic signature)</li> <li>• Click on the SAVE button to delete the document or on the CANCEL to not delete it and go back to the document details screen</li> </ul> <p>Rem 1: Only document's owner can delete a document</p> <p>Rem 2: The only way to work again with a deleted document is to undelete it</p>
UNDELETE	<p>To undelete a deleted version of a document:</p>

Option	Description
	<ul style="list-style-type: none"> <li>• Give your username, password and a brief description that should explain why you would like to undelete this version (electronic signature)</li> <li>• Click on the SAVE button to delete the document or on the CANCEL to not undelete it and go back to the document details screen</li> </ul> <p>Rem: Only document's owner can undelete a document</p>
CHECK IN	<p>To check in a new document's version (after a check out):</p> <p>Please check the Add a new document into the system section to know how to check in a new document</p>
CHECK OUT	<p>To check out the current active version of a document (in order to modify it and to check in a new version):</p> <ul style="list-style-type: none"> <li>• Give your username, password and a brief description that should explain why you would like to check out this document's version (electronic signature)</li> <li>• Click on the SAVE button to check out the document or on the CANCEL to not check out it and go back to the document details screen</li> </ul> <p>Rem 1: Only document's owner can check out a document</p> <p>Rem 2: The only way to check in a new document version is to check out the current version before</p>
VIEW	<p>To view the document's content in the main eDMS window</p> <p>Rem: Depending on your browser configuration (plug-ins), the document may or may not be displayed. Please contact your administrator for browser configuration problems.</p> <p>To go back to the previous screen, click on the yellow BACK link at the right side of the message area.</p>
DOWNLOAD	<p>To save the document on your local hard disk or on a server</p> <p>Rem: Please note that a document saved on a local disk will leave the document's flow managed by eDMS</p>



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# Chapter 5. The integrated search engine

eDMS is delivered with an integrated powerful search engine. It lets you search documents into all the system locations or into a specific file cabinet by using keywords. Keywords are part of any document pushed into a system. Even if this is a non required information, we encourage you to use keywords every time you push a new document into the system. By this way, you'll be able to retrieve easily your document by just one mouse click. Please check the new document related help section for more information about how to add keywords into a new document.

Rem: From this version you can only search documents through keywords. Please check the next releases section for future implementations.

## Global mode

To search documents through all the system locations, you have to switch first into a global mode. This means that you cannot search through all the system locations if you are currently displaying the content of a specific file cabinet. To switch to global mode, you just have to click on the RESET button on top of the tree. It will display all the document into the main area. Now that you have switch to this mode, enter one or more keyword(s) into the search field (just above the tree) and click on the FILTER button. The integrated search engine will then list you all the documents (with their location) pushed into the system containing the keyword(s) you just have entered.

## File Cabinet mode

To search documents into a specific file cabinet, you have to select first the file cabinet from the tree. Then enter one or more keyword(s) into the search field (just above the tree) and click on the FILTER button. The integrated search engine will then list you all the documents pushed into this file cabinet containing the keyword(s) you just have entered.

When you apply filters by clicking on the FILTER button, this button switch from green to red. This indicates that the filter mode is active. To deactivate this mode, just click again on the FILTER button (without modifying the keywords) and it will automatically switch back from red to green. To apply new filters (even if the FILTER button is already red), just add new keyword(s) and then click on the FILTER button again.

To verify if you are currently in global mode or in file cabinet mode, you can just check the title of the result table displayed in the data area: if it indicates 'the complete public directory' then you are in global mode, if it displays a file cabinet's name, then you are in file cabinet mode.

Rem: Only one directory is available for global search from this version. Please check the next releases section for future implementations.

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# Chapter 6. Add a new document into the system

eTo add a new document into the system, click on the NEW button from the menu area. This process will be done in two steps (two different screens):

- Step 1: document's information
- Step 2: document's content (upload of the physical file into the eDMS system)

Rem: Only users who are part of the documents creators users group are able to create new documents.

## Step 1: document's information

Before to start to enter document's information, you can check if the current document's location is the good one (from the document location info field). If this is not the right place, please select first the appropriate file cabinet for this new document and then click again on the NEW button to add your new document.

Rem: Note that you can also modify the document's location before it's creation by clicking on the DOC LOCATION button from the document details screen.

First, you have to give some information regarding this document before to push it into the system:

- **NAME:** To identify your document, you have to give it a name. This information is required by the system.
- **TYPE:** Document's type. This information is required by the system. You can manage the content of this drop down list from the maintenance screen.
  - A document can have the same name of another document if his type is different than the type of the other document.
  - A document cannot have the same name AND type of another document pushed into the system.
- **PROPERTY:** Document's property. This information is used to define the document's flow. Only document's owner are able to modify the document's property. Its under his/her own responsibility to choose and appropriate property (which define the document's flow) regarding the document's type. Please check the next releases section for future implementation. This information is required by the system. You can manage the content of this drop down list from the maintenance screen.

The 'none' value is used by default. This value means that no flow (control and/or validation) will be affected to this document.

- **DESCRIPTION:** You can describe the content of the new document by adding some text into this area. This information is not required.
- **KEYWORDS:** We encourage you to specify one or more keywords associated to each document you push into the system. This information will be very usefull when you'll try to retrieve this document by using the integrated search engine.

Rem: To add more than one keyword for a same document, you must separate your keywords with a blank character (space).

- **AUTHORITIES:** You must specify (required information) which group of users will have access to this new document. Four specific accesses must be defined:
  - READ
  - WRITE
  - EXECUTE
  - DELETE

The 'nobody' value is used by default. This value means that only the document's owner will be granted with those authorities.

Rem: You can manage the content of this drop down list from the maintenance screen.

- **START DATE:** You can specify when the document will be available for users. If no date is specified, the document is immediately available. To specify a date, click on the calendar icon and select a date. For validation reason, you cannot enter a date manually into the date field (which is in fact in readonly mode).
- **END DATE:** You can specify when the document will be expired. If no date is specified, the document will never be expired. To specify a date, click on the calendar icon and select a date. For validation reason, you cannot enter a date manually into the date field (which is in fact in readonly mode).

Rem: From this version, if you would like to modify the end date of a document release, you must push a new release into the system with the modified end date. Please check the next releases section for future implementation.

- **INFOS:** You can use this non required information to manage, for example, an internal workflow specific to your company. By this way, you can add some comments for each point of the Infos drop down list.

Rem: You can manage the content of this drop down list from the maintenance screen.

Note for Administrators: Infos attributes are stored sequentially for a document. The sequence is linked to the infos fields sequence defined from the maintenance. The only link between the content of the infos fields and the infos fields labels is this sequence (e.g. if the label of the third info field is modified from the maintenance, it will be modified for ALL documents)

- **VERSION START:** In order to manage the different versions a document can have, you must specify here a version start. This required information is splitted into three fields (eg: 1.0.1).

Once at least all required information is entered, click on the NEXT button to switch to the upload screen.

## Step 2: document's content (upload of the physical file)

This screen displays the document's data given in the previous screen. If one or more information is wrong, you can just click on the CANCEL button and the system will go back to the previous screen and automatically retrieve all document's data you have entered. Then you can apply required modification(s) and click on the NEXT button again.

When data are correctly given for this new document, you have to complete the electronic signature by giving your username, password and the reason for which you want to add this new document into the system. Then click on the browse button (in the UPLOAD FILE field). It will browse your hard disk (or a hard disk of a computer on your internal network) to allow you to select the file (document) you want to push into the eDMS system. When it's done, the path is displayed in the

UPLOAD FILE field and you can now click on the SAVE button to effectively push the file into the system.

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# Chapter 7. Advanced fonctionnalités

As an Electronic Documents Management Systems, eDMS must be able to manage, control and provide access to electronic documents. This is done through advanced fonctionnalités integrated into the system. Some of them are activated by the user. Others are running as background tasks.

## User fonctionnalités

Some eDMS fonctionnalités are activated after a specific user action:

### 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)

### Control and Validation

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.

eDMS lets you manage your own documents working flow, including control and validation, by associating a property to each document.

This means that when a check for control and/or validation is required (depending on the document's flow), and if your user is defined into the control and/or validation users group, you'll have to control/validate or reject documents.

By using the electronic signature mechanism, you'll be able to validate (or not) the document and, by this way, complete the document's flow.

## System background fonctionnalités

Some processes are running on background in a totally transparent way for the eDMS user:

### Version robot

A version robot has been integrated into the system. The main job of this robot is to decide which version of a document must be set to active and which version of a document must be displayed into the documents list table.

The robot will be activated:

- Each time you upload a new document into the system

- For each approval/rejection step for the control process
- For each approval/rejection step for the validation process

How is it working? The robot checks all document's versions. For each version, it verifies if the status of the document is not pending, expired, rejected or waiting for control/validation and takes the last version corresponding to those criterias. If a version is found, this version is defined as active and visible. If a version is not found, the robot will take the last version and set this one to visible (but not active).

Rem: The version robot is also used by the system to send e-mails notifications for the document flow.

## E-mails notifications

eDMS includes an e-mails notification system that will automatically send electronic mails to users regarding the document's flow:

- If a control process is required for a specific document, an e-mail will be automatically sent to the group of controlers that has been defined for this document
- If a validation process is required for a specific document, an e-mail will be automatically sent to group of validators that has been defined for this document
- If a document has been rejected for control and/or validation reason, an e-mail will be automatically sent to the owner of this document
- Each time a document has successfully passed a control and/or validation process, an e-mail will be automatically sent to the owner of this document

How is it working? The robot checks all document's versions. For each version, it verifies if the status of the document is not pending, expired, rejected or waiting for control/validation and takes the last version corresponding to those criterias. If a version is found, this version is defined as active and visible. If a version is not found, the robot will take the last version and set this one to visible (but not active).

Rem: The version robot is also used by the system to send e-mails notifications for the document flow.

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# Chapter 8. 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.

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# Chapter 9. eDMS Maintenance

In order to correctly maintain the eDMS system, some maintenance tasks should be performed, like the documents locations management or the maintenance of some drop down lists used inside the system.

In order to correctly maintain the eDMS system, some maintenance tasks should be performed, like the documents locations management or the maintenance of some drop down lists used inside the system.

## Locations management

Sometimes, you will have to manage folders and/or file cabinets where documents are stored into the eDMS system. This section lets you to add, rename and/or delete folders and file cabinets. Please consult the eDMS Maintenance Manual for more explanation about how to manage locations through eDMS.

## Drop down lists management

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

Information that you can easily manage from the maintenance are:

- Document properties (workflow)
- Document types
- Document info

Please consult the eDMS Maintenance Manual for more explanation about how to manage drop down lists through eDMS. From all sections, you can CREATE new items or DELETE current items.

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# Chapter 10. Well 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: The sort (descending mode) is based on checkin date (instead of document's name) when you click on the BACK button from the document history screen followed by a click on NORMAL VIEW.
- The BACK link dissappear: The yellow BACK link (automatically created at the top right of the screen when you display a document) will sometimes dissappear without going back to the previous screen (please check the FAQ for a turn around).
- Sort on checkout and available status only: Sort on document's status only done for checkout and available status.
- Click on tree after downlading a document: You cannot directly click on the tree after downloading (and saving on your disk) a document. You have to click on the NORMAL VIEW button before to use the left tree anymore.

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# Chapter 11. Frequently Asked Questions (FAQ)

11.1. I have some strange colors effect around the pictures of the interface. How can I solve this problem?

The configuration of your video card is probably set to 16 bits colors and should be set to 32 bits (depending on your screen resolution and video card type). Please contact your system administrator to modify this parameter on your computer.

11.2. Why nothing happen when I click on the small calendar icon?

The calendar is displayed in a new browser window, probably behind your active window. Use ALT\_TAB keyboard keys to switch to the eDMS calendar window.

11.3. How can I go back to the previous screen after displaying a document?

After you click on the eye icon, the corresponding document is displayed into the data area. To go back to the previous screen, a yellow BACK link is automatically created at the top right of the screen (near the message area). Sometimes, after clicking on this link, the link will dissapear without going back to the previous screen (this bug should be fixed within next release). You can then right click on your mouse button and select the first BACK link from the menu to go back to the previous screen.

11.4. Where can I find commercial support on eDMS?

The company ROOTFUSION [<http://www.rootfusion.com/>] provides you commercial support and maintenance contracts based on The NO-SOD Technology.

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# Chapter 12. Next releases

Please find below the next implementations that should be added to the next version of eDMS:

- Number of rows for paging: The number of rows for the paging will be managed by the eDMS administrator from the maintenance screen (fixed to 15 for this version).
- Document selection facility: You'll be able to click anywhere (instead of on the name only) on the row of a document (from the documents list screen) to display the document's details.
- Global search on multiple directories: Possibility to switch to global search mode (RESET button) from multiple directories: public directory, personal directory and approvals (which will contain only documents that have to be approved).
- Empty file cabinet icon: Empty file cabinet icon will be added (on the left tree) to directly view if a file cabinet contains documents or not.
- Sorting on the Queued column: Document's table will be also sortable for the QUEUED column.
- Enforced search engine: Possibility to search documents not only through keywords and description.
- Document's type will define document's flow: A link will be defined in the maintenance between document's type (type) and document's flow (property).
- Manifest document tracking: This tracking will enable to keep records of people and document copy identification.
- Uncheckout function: Documents owners will have the possibility to uncheckout a document.
- Document ownership transfer: Administrators will have the possibility to transfer a document ownership (from a user to another one).
- Modify the end date: Possibility to modify the end date of a document release (if this is the active release or the last pushed release).

# Chapter 13. Appendices

## Appendix 1: Menu button's availability

Table 13.1. Appendix 1: Menu button's availability

	WEL-COME	NOR-MAL VIEW	VIEW DE-LETED	NEW	DOC INFO	MAIN-TEN-ANCE	SYM-BOLS	ABOUT
NEW		X	X				X	
NOR-MAL VIEW			X	X	X		X	
DE-LETED VIEW		X		X			X	
LOCA-TIONS	X							
SYM-BOLS		X	X		X			
CHANG E DATA					X			
VIEW HIS-TORY					X			
DOC LOCA-TION					X			
MAIN-TEN-ANCE	X							
DELETE					X			
UN-DELETE					X			
CHECK IN					X			
CHECK-OUT					X			
LOCK					X			
ABOUT	X					X		

### Note

The title row indicates the USER INTERFACES - The left column indicates the BUT-TONS

Some options may not be available regarding your profile. As all application's menus are dynamic-ally build, you should not have access to one or more options described on this table.

## Appendix 2: User profiles

When a new user is created by your administrator, he has 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 new document
- Administrator: user can access the maintenance and manage document locations

Users belonging both to Document Manager and Administrator groups will be granted with all privileges from both user profiles (but the user profile displayed will only be Administrator).

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

## Appendix 3: List of documents status

Eleven different status are used in eDMS to represent the flow of a document pushed into the system. Each status is represented by a specific icon:

**Table 13.2. Appendix 3: List of documents status**

ICON	STATUS	DESCRIPTION
CLOCK	Pending	A document has been pushed with a subsequent start date
GREEN LIGHT	Available	An active document has been pushed into the system and is available
UP ARROW	Checked Out	The document has been set in a status check out by an editor (or somebody having write access to the document), in order to prevent simultaneous updates of a new document release. When a document is checked out, only the person who set this status is able to check in a new release.
PADLOCK	System lock	Document locked by the system when a user is modifying document's data
TRASH	Deleted	A user can delete a non used document (and undelete it if necessary)
X	Expired	The end date of a document has been reached
X on UP ARROW	Checked Out and Expired	The end date of a document has been reached but a new version of the document is currently checked out
C SIGN	Waiting for Control	A document is submitted to an internal validation process flow and needs to be controled
V SIGN	Waiting for Validation	A document is submitted to an internal validation process flow and needs to be validated
GLASSES MAN	Rejected at control	A document, submitted to an internal validation process flow, has been rejected at the control step
STOP MAN	Rejected at validation	A document, submitted to an internal validation process flow,

ICON	STATUS	DESCRIPTION
		has been rejected at the validation step

Rem: The status is directly linked to a document and NOT to each version of a same document.

Table below represents the rules applied on document that are pending, available or expired (regarding document status):

**Table 13.3. Document flow rules**

	EXPIRED	PENDING	TIME OK
DELETED	DELETED	DELETED	DELETED
LOCKED	LOCKED	LOCKED	LOCKED
WAITING CONTROL	WAITING CONTROL	WAITING CONTROL	WAITING CONTROL
WAITING VALIDATION	WAITING VALIDATION	WAITING VALIDATION	WAITING VALIDATION
REJECTED CONTROL	REJECTED CONTROL	REJECTED CONTROL	REJECTED CONTROL
REJECTED VALIDATION	REJECTED VALIDATION	REJECTED VALIDATION	REJECTED VALIDATION
CHECKED OUT	EXPIRED	PENDING	CHECKED OUT
NO LOCK	EXPIRED	PENDING	AVAILABLE

## Appendix 4: 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](mailto:info@no-sod.org)
- By visiting our website at <http://www.no-sod.org>