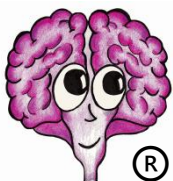


# DocuBrain® TechDoc Document Manager User Guide



A DocuBrain® Product

<https://docubrain.com/>

By Prevo Technologies, Inc.

<https://prevo.com/>



## **DocuBrain® TechDoc Document Manager User Guide**

By Prevo Technologies, Inc.

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### Revision History

Revision	Date	Comments
10	02/12/2020	Initial TechDoc 10 Release

## 1. Introduction

TechDoc is an Electronic Document and Records Management System that is used to manage the entire lifecycle of documents and the records related to them. You might ask, "Why do I need such a system?" In a small office, you would probably know everything that is going on; where important drawings, papers, invoices and the like would be stored in personal or shared file cabinets. Information could be easily shared simply by asking the person sitting next to you or looking in the file cabinet.

But what if your office has multiple locations, thousands of employees and/or hundreds of contractors who are all creating, reading, writing, and sharing documents, pictures, drawings, audio, video and other electronic files?

Hundreds or thousands of documents could be in circulation at any given point in time. Some of these documents may be proprietary or confidential and must be restricted to authorized parties. Other documents may be "works-in-progress" not ready for distribution, or may require revision or approval by different groups or individuals. And don't forget that all of these documents must be properly accounted for. TechDoc provides a document management and search engine environment that handles these important tasks. This allows your staff, department, and program to gain competitive efficiencies and maintain a secure repository.

By US law, Government organizations are required to maintain records. TechDoc helps ease this burden with many innovative features. TechDoc has the concept of automatic records. Certain types of documents should always have a record tied to them. For example, legal business agreements between the Government and other organizations should always have a record associated with them. TechDoc can automatically create and maintain a record for a legal business agreement as soon as a user places it in the system. TechDoc can also create automatic records when documents are placed into specific cabinets or folders.

In addition to automatic records, TechDoc supports manual records. A user can create a record set for a specific need, such as a new contract, an accident, a law suit, etc., and then create records in that set against documents stored in TechDoc. Because TechDoc supports non-resident documents (documents that refer to physical real-world items or electronic items that must be stored in another system), it is possible to add a record to the set that refers to the non-resident item.

### 1.1. How TechDoc Is Organized

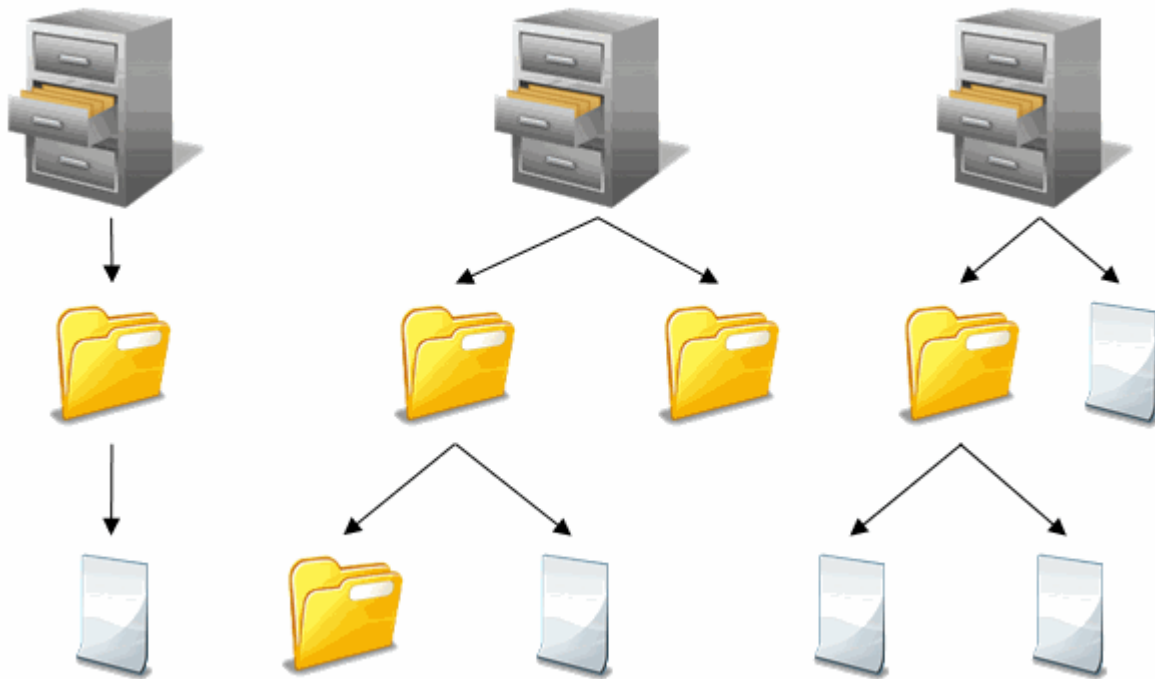
TechDoc stores electronic documents, folders, and file cabinets in a database that is similar in many ways to a conventional office file cabinet.

Throughout this guide, references will be made to cabinets, folders, and documents. TechDoc stores these items similar to Windows or Linux by using an organized hierarchy. Cabinets are at the top level. They can contain documents and folders. Folders are at the second level. They can contain single or multiple documents as well as other folders. Documents are at the bottom

level. As mentioned earlier, documents can contain text documents, photographs, audio, video, engineering drawings, spreadsheets, and flowcharts.

The figure below gives a visual example of how this works:

TechDoc Organization



## 1.2. TechDoc Navigation

TechDoc has been designed for easy navigation. Consistency is a key part of the design. Let's first look at the different areas that make up a typical screen.

Root		3 Cabinets	
	Name/Number	Description/Title	
	Root	Contains All Cabinets	
	Mailboxes	All user mailboxes	
	Projects	All project folders	
	Users	All user home folders	

- A. On the top of the screen is the main menu bar, which performs several functions. The first line of the main menu is mainly for informational purposes. It tells you that you are working on a document manager (left), what server you are working on

- (center), and whom you are currently logged in as (right). The second line provides navigation to the main areas of the application. Finally, the third line provides searching features; quick search for the most common items (left) and advanced search for all major items (right).
- B. In the main body of the screen is the current item this is being worked on. When multiple items are display, the current item will be highlighted. Notice that the Root is highlighted in this example.
  - C. To the left of the current item is the side menu. The side menu provides all the commands that are available for the current item. In additional, a help link is available at the bottom of each side menu. The help provides information about the current screen that is being displayed.

### **1.3. Data Security and TechDoc**

TechDoc is a robust platform for data storage and retrieval. It provides data storage and access capabilities for ITAR (International Traffic in Arms), EAR (Export Administration Regulations), as well as various organization specific security standards (such as NASA's NPG 2810.1 which defines procedures and guidelines for implementing security for Information Technology Systems).

TechDoc is designed to support a wide range of different environments, locations, and operating systems. Security is integrated into TechDoc at multiple levels all of which are configurable by the Administrator. You can assign security via user sign-on, grant specific permissions to a single document, or create broader access by group, physical network location, project, document classification or by defining custom roles. Once defined, these settings can be applied automatically so that security is in place each time a document is created by a specific user.

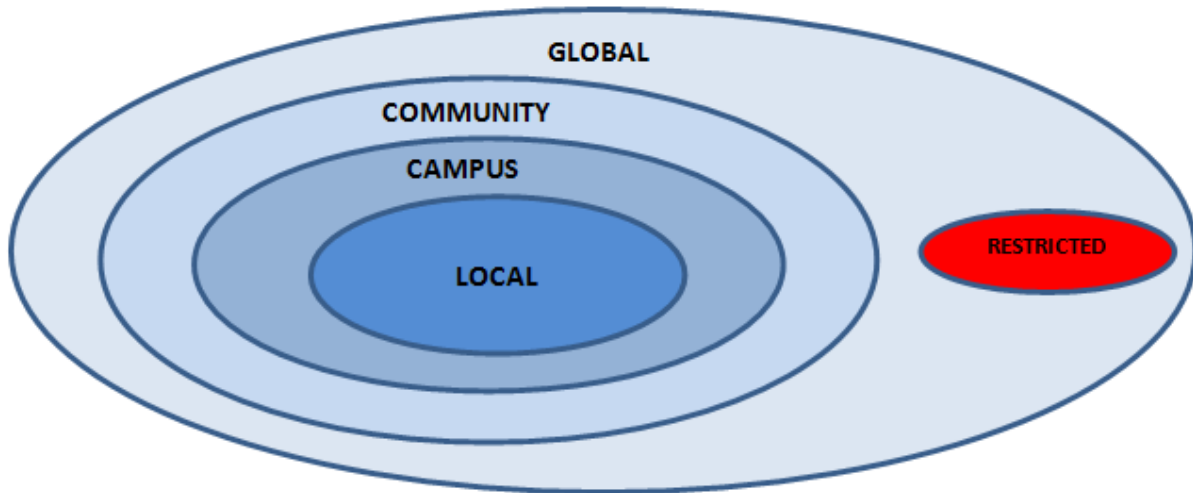
TechDoc features document encryption, encrypted transmission via https, internal firewall support, and a complete audit trail of all changes, log ins, log outs, and document fetches.

TechDoc supports all many authentication methods including eAuth Single Sign-On (using SAML), Two Factor (RSA SecurID), LDAP, NT Domain, and Radius. User access to documents can be restricted or granted in a variety of ways that best serve your workflow and security needs.

#### **1.3.1. Configuring TechDoc Security**

TechDoc uses multiple layers of security as an effective barrier to non-authorized use. Access can be limited to the location (Network Address) of your computer, type of user, category of document, or a particular document. Security is quite flexible and can be easily created and then later modified.

Below is a visual example of the TechDoc Security Model – Location (Network Address):



The innermost circle is more restrictive while the outermost circle is the least restrictive. The exception is the "Restricted" circle, which we will discuss in a moment.

Example: Local is the most restrictive circle, while Global is the least restrictive.

Each inner circle is considered to be a subset of the outer circle containing it and is also considered to be in that circle. The table below summarizes this relationship with a more detailed explanation following.

Circle	Restricted	Local	Campus	Community	Global
Subset Of	Global	Campus Community Global	Community Global	Global	

← More restrictive

### 1.3.2. Network Address Categories

#### Local

Local is anyone who successfully logs in with a valid username and password from a computer whose IP address lies within a network circle trusted for log in purposed by the system. Only Local users are permitted to make modifications to documents that they own or have been granted access. Read access is granted to the Local circle by associating access to a document or folder and adding "\*Local users" to the selected users' column.

**Campus**

Campus is normally used to define the IP addresses that are trusted for log-in purposes, which are part of the logical "Campus" for a specific TechDoc installation. This circle can also be used to let anonymous users from these campus addresses the ability to read documents without them having to log in or even having an actual account on the Document Manager. Campus users are considered to be more trusted than community and global users.

**Community**

Community is normally used to define the IP addresses that are not trusted for log-in purposes but are trusted for reading documents that are somewhat sensitive but not enough to require accounts. It is normally used to let anonymous users from these community addresses to read documents without them having to log in or not even having an actual account on the Document Manager. Community users are considered to be more trusted than global users but less trusted than campus users.

**Global**

Global is used to specify that anyone who has internet access to the Document Manager can read a document that has global access assigned to it. The exceptions are known hacker sites and countries with technology restrictions. Global is synonymous with Public, which is used on many other systems.

The term "Global" was chosen to emphasize the fact that you are giving worldwide access and it must be used wisely due to the sensitive nature of many documents that should not be distributed outside of the US. When in doubt, you should consult your local export control office for guidance.

**Restricted**

Restricted is used to limit and control individual users having access to TechDoc. It is defined by a set of IP addresses ranges, which are considered to be partially trusted for a specific Document Manager. A user coming from a restricted address may fetch (read) a document if the document is Global or if the user enters a valid username and password that has been specifically associated to the document for read access. In addition, someone originating from a restricted address can only log into a user account that is marked as restricted.

When a restricted user logs into TechDoc, they are still considered outside of the local circle. This means that restricted users cannot access documents just because a document has Local, Campus, or Community read permissions. A restricted user must own a document, have been specifically associated to the document for access, or the document must have Global read permissions.

Additionally, restricted users cannot access folders just because a folder has Local read. A restricted user must own a folder or have been specifically associated to a folder to access it.



## 2. Getting Started Managing Documents

Before putting documents into TechDoc, you should contact your local TechDoc Administrator or Help Desk for guidance. Typically, your system will have guidelines such as:

- What kind of document numbering should I use on my documents?
- What kinds of documents are allowed on my system (ITAR, EAR, SBU, etc.)?
- Where should I create my documents? Under my own home folder? Under a project folder?
- What metadata should I put on my documents (which Doc Type, should I use any particular keywords, etc.)?

### 2.1. Organizing with Folders

TechDoc provides hierarchical folders to help organize documents. There is no requirement to create folders under your home folder, but over time you may find it useful. Folders can be used to organize documents by project, purpose, year, etc. If you change your mind later, you can always use "Move Contents" to reorganize your documents into new folders.

### 2.2. Using Groups

TechDoc provides the ability to create and use Groups. A Group is simple a list of one or more users. Groups can be used to grant access to a document or determine who will receive email when a document changes or gets released.

Groups provide flexibility. If you create Groups and associate them to your documents, you can add or remove somebody from a Group without having to change all the associations on all of the documents that use the Group.

The system automatically maintains Employer and Organization Groups. You can then use these system Groups on your documents just like Groups that you create yourself but with the added benefit that you don't have to maintain them. If you add an Employer Group to a document, as soon as a person is added to or removed from TechDoc under that Employer, they're automatically added or removed from the Employer Group.

### 2.3. Documents and Generations

Now you have some folders and Groups set up, it's time to put in a document. So, what can a TechDoc document contain? A TechDoc document can be any type of electronic computer file that you have. It can be a word processing document, spreadsheet, presentation, CAD drawing, audio file, video, picture, ZIP file, etc.

TechDoc can even store information about things that aren't electronic files, such as physical books, video tapes, microfiche, etc. Non-resident documents are documents that you can create in TechDoc that refer to objects that don't actually reside inside of TechDoc.

In TechDoc, documents are comprised up of one or more generations. When you create a document, the file is uploaded as generation 1.0 of the document. Then when you reserve and replace the document with a new version, that file is uploaded as generation 2.0 of the document, and so on. This permits TechDoc users to see different versions (known as generations) of the document as it has changed over time.

When a generation of a document is created in TechDoc, it is unreleased. An unreleased generation is considered to be a draft copy. To let other people know that a document is no longer a draft, the document should be released. When a document is released, a particular generation of the document is assigned a revision name to signify that the generation is no longer a draft.

Not every generation of a document needs to be released. It is typical to reserve and replace a document several times before deciding that it is good enough to be released. Most people will leave the unreleased generations around for historical purposes.

In addition, many documents will be released multiple times. Consider a document that describes a procedure to operate a crane. After multiple generations and several reviews, the document might be released as revision "A". After several months of workers using the document to operate the crane, a minor incident occurs. On reviewing the incident, Safety determines that additional instructions and warning should be added to the document. After the document is changed and approved, a new generation of the document is released as revision "B". A couple years later, changes are made to the crane, the document is updated, and revision "C" is released. If there were several cranes and only one was updated, the older crane might be operated using revision "B" while the updated crane might be operated using revision "C" of the document.

### 3. Using URLs to Access TechDoc Content

URLs can be constructed to access content on a TechDoc Document Manager or Search Manager from other web sites. These URLs also provide the ability to always return the latest revision of a document using a special variable. In this way you can construct a URL once, place it on your website, and be assured it is always linked to the latest revision of a document without needing to constantly update it. URLs can be constructed to provide content such as:

- Display Document attributes
- Retrieve document and "Launch" native viewer
- Display Document Status
- Display Documents matching certain criteria on the Search Manager

Before we dive into the available URLs and their usage, let's first look at a TechDoc URL so we can become familiar with the format. Take for example, a fetch URL:

[https://www.example.com/servlet/dm.web.Fetch?doc=DOC-NO&rev=\\$latest](https://www.example.com/servlet/dm.web.Fetch?doc=DOC-NO&rev=$latest)

Examining this URL, we can see the host where TechDoc is located:

<https://www.example.com/>

The second bit of the URL pointing to Fetch on a Document Manager (Note this portion of the URL is case sensitive):

<servlet/dm.web.Fetch>

Lastly, we see the query string referencing a Document. This query string specifies the Document by Document Number (*doc=DOC-NO*) and Revision (*rev=\$latest*):

[?doc=DOC-NO&rev=\\$latest](doc=DOC-NO&rev=$latest)

In the example above, *DOC-NO* should be replaced by the Document Number of the target Document. For instance, if you had a Document with the Document Number TEST123 you would specify *doc=TEST123*. Instead of just specifying a particular Revision, the Revision is specified as *rev=\$latest* meaning always return the latest Revision of the Document. If you wished to specify the Revision ABC of Document TEST123, the URL should appear as:

<https://www.example.com/servlet/dm.web.Fetch?doc=TEST123&rev=ABC>

There are several characters that are valid in a Document Number but can't be placed directly into the URL. For example, notice that the ampersand (&) is used to mark the end of the Document Number and the beginning of the revision section. This convention is an Internet requirement and not a TechDoc one. So, if a Document Number contains an ampersand and you were to put it directly in the URL, the Document Number would be chopped apart at the ampersand by the TechDoc server, and the fetch would fail. So, to avoid this problem, you have to encode the special characters by replacing the special character with a percent sign (%)

followed by the 2-digit hexadecimal value of the special character. Here's a list of the special characters and their encoded values:

Special Character	Value to Put in the URL
&	%26
/	%2F

Say for example you wanted to construct a Fetch URL like the previous example to specify the Document Number TestResults&Data, the URL would look like:

[https://www.example.com/servlet/dm.web.Fetch?doc=TestResults%26Data&rev=\\$latest](https://www.example.com/servlet/dm.web.Fetch?doc=TestResults%26Data&rev=$latest)

Notice the %26 where the ampersand would be.

It is also possible to identify the Document to fetch by using the Document's ID number. When a Document is created in TechDoc it is assigned a unique ID number. The ID number stays the same for the entire life of a document, even if it's renamed. For example, the URL:

[https://www.example.com/servlet/dm.web.Fetch?did=2017&rev=\\$latest](https://www.example.com/servlet/dm.web.Fetch?did=2017&rev=$latest)

### 3.1. URL Examples

This section contains a few of examples of some of the more commonly used URLs. We'll also show you how to customize URLs to query a Search Manager. Even though we are only touching on a few different use cases, there are many more. Remember, any search you perform on a Search Manager constructs a URL that you can take and reuse elsewhere; the possibilities are endless. You should review each of the examples in this section to become familiar with URL construction; especially if you plan on creating URLs for use with the Search Manager.

#### 3.1.1. View the latest Released version of a particular Document

This URL will fetch the latest released version of a Document and open the appropriate viewer to view the downloaded file. In this example, we fetch a Document with the Document Number Invoice-12-05-2013

[https://www.example.com/servlet/dm.web.Fetch?doc=Invoice-12-05-2013&rev=\\$latest](https://www.example.com/servlet/dm.web.Fetch?doc=Invoice-12-05-2013&rev=$latest)

By default, rev will attempt to return the rendered PDF version of the Document first. If there is no rendered PDF version, the original native version will be returned.

### 3.1.2. View the latest released Generation of a particular Document

This URL will fetch the latest released Generation of a Document in its native format. In this example, we fetch a Document with the Document Number TEST123

[https://www.example.com/servlet/dm.web.Fetch?doc=TEST123&rev=\\$latest&type=native](https://www.example.com/servlet/dm.web.Fetch?doc=TEST123&rev=$latest&type=native)

This type of a fetch will return the original file in its native format and not the rendered PDF version. The only time you will get a PDF returned is if the original native file was a PDF to begin with.

### 3.1.3. View the Document attributes

This URL will take you to the Document Status and Retrieval Screen. This screen displays all of the Document's attributes as well as all of the Document's Generations. In this example, we will show the attributes of a Document with the Document ID 1234

<https://www.example.com/servlet/dm.web.StatusRetrieval?did=1234>

### 3.1.4. View all Documents in an Organization

To retrieve a list of Documents in an organization, you can build a search URL that performs a query to the Search Manager. Each time this link is clicked, a new query will be made and up to date results will be displayed. In this example, we are searching for all of the Documents belonging to the Organization Prevo Technologies, Inc. which has an abbreviation of PTI

[https://www.example.com/servlet/search?FIELD1=SM\\_ORGANIZATION&TEXT1=PTI&MAX\\_RESULTS=50](https://www.example.com/servlet/search?FIELD1=SM_ORGANIZATION&TEXT1=PTI&MAX_RESULTS=50)

Because the Search Manager provides such flexible yet structured searching, search URLs can be rather complex. Most of the time it is easiest to visit the Search Manager you would like to query and enter your search parameters. Then on the Search Results screen, copy the entire URL displayed in the location bar of your internet browser and use that for your URL.

To expand upon the example above, we see the first parameter *FIELD1=SM\_ORGANIZATION* stating the first we wish for the first field to search on Organization. The next parameter *TEXT1=PTI* says that for the first field (Organization) we wish to look for PTI. The last parameter *MAX\_RESULTS=50* says show me a maximum of 50 results.

### 3.1.5. View Documents by specific Document Type

To retrieve a list of Documents by Document Type, you can build a search URL that performs a query to the Search Manager. Each time this link is clicked, a new query will be made and up to date results will be displayed. In this example, we will search for all of the Documents that have a Document Type of INVOICE

[https://www.example.com/servlet/search?FIELD1=SM\\_DOC\\_TYPE&TEXT1=INVOICE&MAX\\_RESULTS=50](https://www.example.com/servlet/search?FIELD1=SM_DOC_TYPE&TEXT1=INVOICE&MAX_RESULTS=50)

### 3.1.6. View Documents by Organization and Doc Type

To retrieve a list of Documents by Organization and Document Type with a maximum number of results set at 2000, you could use a URL like the one below. In this example, we will specify an Organization of PTI and a Document Type of INVOICE

```
https://www.example.com/servlet/search?FIELD1=SM\_ORGANIZATION&TEXT1=PTI&JOIN1TO2=AND&FIELD2=SM\_DOC\_TYPE&TEXT2=INVOICE&MAX\_RESULTS=2000
```

This example is a bit more complex than the examples before. The first part of the query should look familiar. We set *FIELD1* to *SM\_ORGANIZATION* and *TEXT1* to *PTI* like we have in previous examples. This time however, we are specifying two criteria fields so there is a second field *FIELD2* and *TEXT2*. Notice in the middle of the query there is the parameter *JOIN1TO2=AND*. This says that both *FIELD1* and *FIELD2* must be set this way on the Document in order for it to be returned as a result.

### 3.1.7. Additional Search Manager URL parameters

This section contains a few examples showing how to use the additional parameters available for use in Search Manager URLs.

#### 3.1.7.1. JOIN

The JOIN parameter is used when you need to search on more than one field at the same time. For example, let's say we want to find all of the Documents that have a Document Category of TradeSecret AND a Document Type of INVOICE. We could construct a search URL like this

```
https://www.example.com/servlet/search?FIELD1=SM\_DOC\_CATEGORY&TEXT1=TradeSecret&JOIN1TO2=AND&FIELD2=SM\_DOC\_TYPE&TEXT2=INVOICE
```

Notice in the URL above the parameter *JOIN1TO2=AND*. This parameter states how the first field should be compared with the second field. Since we said a matching Document must have a Document Category of TradeSecret (first field) AND it must also have a Document Type of INVOICE (second field) we want to use the logical operator AND in our join. Say we had a third field that must match as well; the Organization set to PTI. We would have a URL like this

```
https://www.example.com/servlet/search?FIELD1=SM\_DOC\_CATEGORY&TEXT1=TradeSecret&JOIN1TO2=AND&FIELD2=SM\_DOC\_TYPE&TEXT2=INVOICE&JOIN2TO3=AND&FIELD3=SM\_ORGANIZATION&TEXT3=PTI
```

Notice in the URL the parameter *JOIN2TO3=AND*. Like the first join *JOIN1TO2=AND*, this join says that both the second and third field must match as well. There are other logical operators for use on a join between fields. Maybe we would like to return all of the Documents belonging to PTI but we don't want any Documents with the Document Type INVOICE (give me all the Documents except Invoices). You would use a URL like

```
https://www.example.com/servlet/search?FIELD1=SM\_ORGANIZATION&TEXT1=PTI&JOIN1TO2=AND\_NOT&FIELD2=SM\_DOC\_TYPE&TEXT2=INVOICE&MAX\_RESULTS=2000
```

Notice this URL looks just like the previous URL but the join operation is *AND\_NOT*. This means all of the Documents must belong to the PTI Organization but not have a Document Type of INVOICE. The last example we'll show is using the logical *OR* operator. Let's say that we would like to return all of the Documents from two different Organizations Prevo Technologies, Inc. (PTI) and Some Other Organization (SOO). Because a Document can only belong to one Organization, we can't say PTI and SOO. We need to say PTI or SOO, so we can construct a URL like this

```
https://www.example.com/servlet/search?FIELD1=SM_ORGANIZATION&TEXT1=PTI&JOIN1TO2=OR&FIELD2=SM_ORGANIZATION&TEXT2=SOO&MAX_RESULTS=2000
```

### 3.1.7.2. SORT

There are times when you search and the results are just too large to try and dig through. Times like these are where sorting your results can be very handy. Say you perform a search for all of the Documents belonging to PTI with the Document Type INVOICE like our previous example

```
https://www.example.com/servlet/search?FIELD1=SM_ORGANIZATION&TEXT1=PTI&JOIN1TO2=AND&FIELD2=SM_DOC_TYPE&TEXT2=INVOICE
```

Let's say this search returns 10,000 Documents and we want to see all of these Documents, but we really want them sorted by the Document Category. You could add a sort parameter to the URL to say sort by Document Category like so

```
https://www.example.com/servlet/search?FIELD1=SM_ORGANIZATION&TEXT1=PTI&JOIN1TO2=AND&FIELD2=SM_DOC_TYPE&TEXT2=INVOICE&SORT=SM_DOC_CATEGORY
```

Specifying a sort parameter of *SORT=SM\_DOC\_CATEGORY* will sort the Documents by Document Category in ascending order. By ascending order, we mean Document Categories starting with A and ending at the bottom in Z. If you wish to sort in descending order (meaning Z – A) just place a minus sign (-) in front of the sort parameter's value like so

```
https://www.example.com/servlet/search?FIELD1=SM_ORGANIZATION&TEXT1=PTI&JOIN1TO2=AND&FIELD2=SM_DOC_TYPE&TEXT2=INVOICE&SORT=-SM_DOC_CATEGORY
```

There are also be times when you will need to sort on multiple fields. Like our example above, let's say when want to see all of the INVOICE Documents that belong to PTI sorted by Document Category and Document Title. We can accomplish this with a URL like this

```
https://www.example.com/servlet/search?FIELD1=SM_ORGANIZATION&TEXT1=PTI&JOIN1TO2=AND&FIELD2=SM_DOC_TYPE&TEXT2=INVOICE&SORT=SM_DOC_CATEGORY,SM_TITLE
```

The URL above will sort Documents first using the Document Category. Then for all of the Documents in a Document Category, they will be sorted by Title. Notice neither of the sort values have a minus sign, so both will be ascending. We could have made either value or both descending if need be.

The last important thing to mention about sort is the SCORE value *[SORT=SCORE](#)*. This is how the Search Manager sorts by default when you do not specify a SORT parameter. The SCORE value means that relevancy score calculated by the search engine that measures how closely the search results match your query. You may if need be sort by SCORE and then another field like so

*[https://www.example.com/servlet/search?FIELD1=SM\\_TITLE&TEXT1=Rocket&SORT=SCORE,SM\\_DOC\\_TYPE](https://www.example.com/servlet/search?FIELD1=SM_TITLE&TEXT1=Rocket&SORT=SCORE,SM_DOC_TYPE)*

The URL above is searching for any Document that has a Title containing "Rocket". This time however, we are sorting first by the search engine score, and then by the Document Type. This means show me first, the Documents that most closely match my query and then order them by Document Type.

### **3.1.7.3. OUTPUT**

Another handy Search Manager URL parameter is OUTPUT. When a search is performed, the search results default to being displayed as a normal HTML web page. At times it may be necessary to consume the search results programmatically and use them in another application. To make this process easier, you can output the search results as XML using the OUTPUT parameter like so

*[https://www.example.com/servlet/search?FIELD1=SM\\_TITLE&TEXT1=Rocket&OUTPUT=XML](https://www.example.com/servlet/search?FIELD1=SM_TITLE&TEXT1=Rocket&OUTPUT=XML)*

The URL above will search all Documents looking only for those containing "Rocket" in their Title. The parameter *[OUTPUT=XML](#)* will cause the results to be displayed in XML rather than a normal HTML web page.



## 4. Command Reference Section

This section contains a reference for all the normal User level commands available on the Document Manager.

### 4.1. Associating for Access

Access can be assigned to a specified object (Document, Folder, Cabinet, Group, or RMA Record Set) to determine which Users are allowed a particular level of access to the object. However, access does not guarantee that the relevant commands can be used on the object. For example, a User can be given Delete access to a Folder but the User cannot actually delete the Folder unless they have the Delete Folder privilege. It is important to note that the owner of an object and Users with the Admin privilege always have full access to the object.

#### 4.1.1. Associating Access for a Document

Access is assigned to a Document to determine which Users are allowed a particular level of access to the Document. It also sets the Read access to the Document. However, access does not guarantee that the relevant commands can be used on the Document. For example, a User is given Delete access to a Document but the User cannot delete the Document unless the User has the User privilege of Delete Document. It is important to note that the owner of a Document and Users with the Admin privilege always have full access to the Document.

- The User must have the Groups privilege.
- The User must have Owner access to the Document.
- To associate access to remote Users, the AllowAssocRemoteAccess System Property must be set to Yes.
- Only the group Read access settings (Global, Community, Campus, and Local) allowed by the Document's doc category will be available.

The Associate Access screen displays all Groups, Users and Remote Users (Remote Users will only be displayed if the AllowAssocRemoteAccess System Property is set to Yes). None indicates that no Groups, Users and/or Remote Users have been associated.

You can associate access to an existing Document or at the time, the Document is created.

Associating Access for an Existing Document

**Navigation:** *[DocMgr > Explorer > Navigate to Desired Document > Side Menu > Assoc Access]*

1. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the Next button to continue.

### Associating Access for a New Document

**Navigation:** [DocMgr > Explorer > Navigate to Folder > Side Menu > Create Document]

1. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the OK button if you do not want to associate access at this time, or click the Next button to continue.

### Associating Groups for a Document

Access can be assigned to a Group of Users for a specific Document. One or more Groups can be associated to a specific Document.

Note 1: If you are not associating Group(s) to this Document but need to associate individual Users, click the Next button to continue.

Note 2: The access to a Generation is determined by the access a User has to the Document that the Generation belongs to.

Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of this Document, view the attributes of this Document's Generations and Renditions and fetch this Document's Generations and Renditions.
<b>Modify</b>	A User can modify the attributes of this Document and this Document's Generations and Renditions. The User must also have the Modify Document privilege.
<b>Delete</b>	A User can delete this Document. The User must also have the Delete Document privilege.
<b>Reserve/Replace</b>	A User can reserve and replace the Document. The User must also have the Create Generation privilege.
<b>Owner</b>	A User can act as the owner of this Document. The User will be able to do anything to the Document that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users on the Group from accessing this Document. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Document,

the User will still get Read access to the Document even though None prevents them from getting any other type of access.

If you specify None, the Users on this Group will have no access to the Document even if the Users are on other Groups that are associated to this Document. However, if an individual User is associated to this Document on the next screen, that access will override the access given to them on this screen. If a User on the Group is the Owner of the Document, or an Admin, they will still have Owner access to the Document.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Select the access (Read, Modify, Delete, Reserve/Replace, or Owner) to be assigned to the Group. One or more access can be assigned to the same Group. Note: Everyone on the Group will get the assigned access.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, select the Group, and click the Show Group button.

Note: Assigning the Group the access of Modify, Delete, Reserve/Replace or Owner also gives Read access to the Group. The Group name and assigned access is displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name (R)</b>	MG (My Groups), (R) Read
<b>MG-Group Name (R,M)</b>	MG (My Groups), (R,M) Read, Modify
<b>MG-Group Name (R,D)</b>	MG (My Groups), (R,D) Read, Delete
<b>MG-Group Name (R,RR)</b>	MG (My Groups), (R,RR) Read, Reserve/Replace

<b>MG-Group Name (O)</b>	MG (My Groups), (O) Owner
<b>SG-Group Name (R)</b>	SG (Shared Groups), (R) Read
<b>SG-Group Name (R,M)</b>	SG (Shared Groups), (R,M) Read, Modify
<b>SG-Group Name (R,D)</b>	SG (Shared Groups), (R,D) Read, Delete
<b>SG-Group Name (R,RR)</b>	SG (Shared Groups), (R,RR) Read, Reserve/Replace
<b>SG-Group Name (O)</b>	SG (Shared Groups), (O) Owner

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associating Access for Individual Users for a Document

If necessary, access can be assigned to individual Users for a specific Document. One or more Users can be associated to a specific Document.

Note: The access to a Generation is determined by the access a User has to the Document that the Generation belongs to.

Definition of access is listed below:

<b>Access</b>	<b>Definition of Access</b>
<b>Read</b>	A User can view the attributes of this Document, view the attributes of this Document's Generations and Renditions and fetch this Document's Generations and Renditions.
<b>Modify</b>	A User can modify the attributes of this Document and this Document's Generations and Renditions. The User must also have the Modify Document privilege.
<b>Delete</b>	A User can delete this Document. The User must also have the Delete Document privilege.
<b>Reserve/Replace</b>	A User can reserve and replace the Document. The User must also have the Create Generation privilege.
<b>Owner</b>	A User can act as the owner of this Document. The User will be able to do anything to the Document that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users from accessing this Document. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Document, the User will still get Read access to the Document even though None prevents them from getting any other type of access.

If you specify None, the User will have no access to this Document even if the User appears on a Group that gives them other access. If the User is the Owner of the Document, or an Admin, they will still have Owner access to the Document.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

Note: Additional security can be added to the Document by adding or removing \*Campus Users (R), \*Community Users (R), or \*Local Users (R) in the Selected Users list. (R) indicates Read access.

Note: Depending on the Document's Doc Category Read access restrictions, \*Campus Users (R), \*Community Users (R), \*Global Users (R), or \*Local Users (R), may have been omitted from the list.

Read Access	Definition of Read Access
<b>*Local Users (R)</b>	Documents available to Users that have an account to the Document Manager.
<b>*Campus Users (R)</b>	Documents available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.
<b>*Community Users (R)</b>	Documents available to Users within the organization's and selected partners IP addresses.
<b>*Global Users (R)</b>	Documents available to anyone on the World Wide Web.

1. Select the User(s) in the Available Users box (on the left) to be associated to the Document by clicking on the User's name. This will highlight the name.
2. Select the access (Read, Modify, Delete, Reserve/Replace, or Owner) to be assigned to the User. More than one access can be assigned to the same User.
3. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected

Users box. To show information for the User, highlight the User name, and click the Show User button.

Note: Assigning the User the access of Modify, Delete, Reserve/Replace or Owner also gives Read access to the User. The User's name and assigned access is displayed in the Selected Users box as follows:

Selected Users	Definition of Codes
User's Name(R)	User has Read access
User's Name(R,M)	User has Read and Modify access
User's Name(R,D)	User has Read and Delete access
User's Name(R,RR)	User has Read and Reserve/Replace access
User's Name(O)	User has Owner access

Note: If the AllowAssocRemoteAccess System Property is set to No, the following will be displayed.

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access Groups and/or Users to this Document.

or

Note: If the AllowAssocRemoteAccess System Property is set to Yes, the following will be displayed.

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associating Access for Remote Users for a Document

Read access for fetching Documents can be assigned to individual remote Users for a specific Document. One or more Remote Users can be associated to a specific Document.

Note: If you do not need to associate Remote Users to this Document, click the OK button to associate the access Group and/or Users to this Document.

The Remote User fields displayed are:

- Any Remote User previously associated to this Document is displayed in the Remote User field.

- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. Click the Add button.

Note: The username can contain wildcards.

- The asterisk (\*) represents zero or more characters.
- The question mark (?) represents exactly one character.
- Multiple asterisks and/or question marks are allowed.
- Consecutive asterisks are not allowed but consecutive question marks are allowed.
- Only an asterisk is allowed.
- Asterisks and question marks may be positioned anywhere as long as they do not break any of the previous rules.

For example, if you would like to give access to a User on the kerberos domain, you would select kerberos from the drop down and then enter the username in the username field. The resulting Remote User would display as kerberos/username when showing associations.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access list and/or User to this Document.

Note: You will need to notify the Remote User(s) that they have been given Read access for fetching this Document. When a Remote User is fetching or displaying the status and retrieval form from a link either in an email or from a search page, if the User is not currently logged in to the DM, they are prompted with a username and password dialog box. If the User types in a valid Remote username and password, they are granted access.

For example, if kerberos/jdoe has been associated as a Remote User to a Document and they attempt to fetch that Document, while not logged in to the DM, they will be prompted for username and password. If they type in kerberos/jdoe into the username and a valid password for jdoe on kerberos, then they will be granted fetch and/or status and retrieval access to the Document. If the User cannot be verified by the remote Authenticator, the corresponding error message is displayed. (User not found, incorrect password, server not found...)

Notes:

- The access to the Document will be updated.

- A history record will be generated for associating access with the Document.
- Email will be sent to the notification associated with the Document.

#### 4.1.2. Associating Access for a Folder

Access is assigned to a Folder to determine which Users are allowed a particular level of access to the Folder. It also sets the Read access to Folder. However, access does not guarantee that the relevant commands can be used on the Folder. For example, a User is given Delete access to a Folder but the User cannot delete the Folder unless the User has the privilege of Delete Folder. It is important to note that the owner of a Folder and Users with the Admin privilege always have full access to the Folder.

- The User must have the Groups privilege.
- The User must have Owner access to the Folder.

The Associate Access screen displays all Groups and Users currently associated to the Folder. None indicates that no Groups and/or Users have been associated.

The Folder Inheritance field is used to specify if the access associated should also be applied to the child folders. Using the drop down, select one of the following options:

- Do not change child folders associations - Says that only this folder will receive association changes and all child folders under this folder will be left unchanged.
- Replace child folders associations with these - Says to replace all child folders' associations with the associations on this folder.
- Merge these associations with child folders associations - Says to merge the associations of this folder with the child folders' associations; in the case of access, any matching people will receive the combination of access specified by this folder and the child folder.
- Override collisions while adding these to child folders associations - Says to add this folder's associations to the child folders' associations; in the case of access, any matching people will receive the access specified by the parent.

You can associate access to an existing Folder or at the time, the Folder is created.

#### Associating Access for an Existing Folder

**Navigation:** *[DocMgr > Explorer > Navigate to Desired Folder > Side Menu > Assoc Access]*

1. Enter the type of Folder Inheritance to use on child folders by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
2. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
3. Click the Cancel button to cancel the command, or click the Next button to continue.



### Associating Access for a New Folder

**Navigation:** [DocMgr > Explorer > Navigate to Desired Location > Side Menu > Create Folder]

The Associate Access screen displays all Groups and Users currently associated. None indicates that no Groups and/or Users have been associated.

1. Enter the type of Folder Inheritance to use on child folders by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
2. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
3. Click the OK button if you do not want to associate access at this time, or click the Next button to continue.

### Associating Groups for a Folder

Access can be assigned to a Group of Users for a specific Folder. One or more Groups can be associated to a specific Folder.

Note 1: If you are not associating Group(s) to this Folder but need to associate individual Users, click the Next button to continue.

Note 2: Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of this Folder and see which subfolders and Documents are in this Folder.
<b>Modify</b>	A User can modify the attributes of this Folder. The User must also have the Modify Folder privilege.
<b>Delete</b>	A User can delete this Folder. The User must also have the Delete Folder privilege.
<b>Create Folder</b>	A User can create a child Folder in this Folder. The User must also have the Create Folder privilege.
<b>Create Document</b>	A User can create a Document in this Folder. The User must also have the Create Document privilege.
<b>Owner</b>	A User can act as the owner of this Folder. The User will be able to do anything to the Folder that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users on the Group from accessing this Folder. Because a logged in User is always considered to be part of the Local group, if \*Local Users (R) is associated to the Folder, the User will still get Read access to the Folder even though None prevents them from getting any other type of access.

If you specify None, the Users on this Group will have no access to the Folder even if the Users are on other Groups that are associated to this Folder. However, if an individual User is associated to this Folder on the next screen, that access will override the access given to them on this screen. If a User on the Group is the Owner of the Folder, or an Admin, they will still have Owner access to the Folder.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Select the access (Read, Modify, Delete, Create Folder, Create Document, or Owner) to be assigned to the Group. One or more access can be assigned to the same Group. Note: Everyone on the Group will get the assigned access.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: Assigning the Group the access of Modify, Delete, Create Folder, Create Document, or Owner also gives Read access to the Group. The Group name and assigned access is displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name (R)</b>	MG (My Groups), (R) Read
<b>MG-Group Name (R,M)</b>	MG (My Groups), (R,M) Read, Modify
<b>MG-Group Name (R,D)</b>	MG (My Groups), (R,D) Read, Delete

<b>MG-Group Name (R,CF)</b>	MG (My Groups), (R,CF) Read, Create Folder
<b>MG-Group Name (R,CD)</b>	MG (My Groups), (R,CD) Read, Create Document
<b>MG-Group Name (O)</b>	MG (My Groups), (O) Owner
<b>SG-Group Name (R)</b>	SG (Shared Groups), (R) Read
<b>SG-Group Name (R,M)</b>	SG (Shared Groups), (R,M) Read, Modify
<b>SG-Group Name (R,D)</b>	SG (Shared Groups), (R,D) Read, Delete
<b>SG-Group Name (R,CF)</b>	SG (Shared Groups), (R,CF) Read, Create Folder
<b>SG-Group Name (R,CD)</b>	SG (Shared Groups), (R,CD) Read, Create Document
<b>SG-Group Name (O)</b>	SG (Shared Groups), (O) Owner

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associating Access for Individual Users for a Folder

Access can be assigned to individual Users for a specific Folder. One or more Users can be associated to a specific Folder.

Note: Definition of access is listed below:

<b>Access</b>	<b>Definition of Access</b>
<b>Read</b>	A User can view the attributes of this Folder and see which subfolders and Documents are in this Folder.
<b>Modify</b>	A User can modify the attributes of this Folder. The User must also have the Modify Folder privilege.
<b>Delete</b>	A User can delete this Folder. The User must also have the Delete Folder privilege.
<b>Create Folder</b>	A User can create a child Folder in this Folder. The User must also have the Create Folder privilege.
<b>Create Document</b>	A User can create a Document in this Folder. The User must also have the Create Document privilege.
<b>Owner</b>	A User can act as the owner of this Folder. The User will be able to do anything to the Folder that the owner can, as long as the User's privileges allow it.

**Note:**

Checking None denies all levels of access (except possibly for read) to Users from accessing this Folder. Because a logged in User is always considered part of the Local group, if \*Local Users (R) is associated to the Folder, the User will still get Read access to the Folder even though None prevents them from getting any other type of access.

If you specify None, the User will have no access to this Folder even if the User appears on a Group that gives them other access. If the User is the Owner of the Folder, or an Admin, they will still have Owner access to the Folder.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

Note: Additional security can be added to the Folder by removing \*Local Users (R) in the Selected Users box. (R) indicates Read access.

Read Access	Definition of Read Access
<b>*Local Users (R)</b>	Users that have an account to this Document Manager can view the attributes of this Folder and see subfolders and Documents in this Folder.

1. Select the User(s) in the Available Users box (on the left) to be associated to the Folder by clicking on the User's name. This will highlight the name.
2. Select the access (Read, Modify, Delete, Create Folder, Create Document, or Owner) to be assigned to the User. More than one access can be assigned to the same User.
3. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.

Note: Assigning the User the access of Modify, Delete, Create Folder, Create Document, or Owner also gives Read access to the User. The User's name and assigned access is displayed in the Selected Users box as follows:

Selected Users	Definition of Codes
User's Name(R)	User has Read access
User's Name(R,M)	User has Read and Modify access

<b>User's Name(R,D)</b>	User has Read and Delete access
<b>User's Name(R,CF)</b>	User has Read and Create Folder access
<b>User's Name(R,CD)</b>	User has Read and Create Document access
<b>User's Name(O)</b>	User has Owner access

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access list to this Folder.

#### Notes:

- The access to the Folder will be updated.
- A history record will be generated for associating access with the Folder.
- Email will be sent to the notification associated with the Folder.

### 4.1.3. Associating Access for a Cabinet

Access is assigned to a Cabinet to determine which Users are allowed a particular level of access to the Cabinet. It also sets the Read access to the Cabinet. However, access does not guarantee that the relevant commands can be used on the Cabinet. For example, a User is given Delete access to a Cabinet but the User cannot delete the Cabinet unless the User has the privilege of Delete Cabinet. It is important to note that the owner of a Cabinet and Users with the Admin privilege always have full access to the Cabinet.

- The User must have the Groups privilege.
- The User must have Owner access to the Cabinet.

The Associate Access screen displays all Groups and Users currently associated to the Cabinet. None indicates that no Groups and/or Users have been associated.

You can associate access to an existing Cabinet or at the time, the Cabinet is created.

#### Associating Access for an Existing Cabinet

**Navigation:** *[DocMgr > Explorer > Navigate to Desired Cabinet > Side Menu > Assoc Access]*

- Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
- Click the Cancel button to cancel the command, or click the Next button to continue.

#### Associating Access for a New Cabinet

**Navigation:** *[DocMgr > Explorer > Navigate to Desired Location > Side Menu > Create Cabinet]*

The Associate Access screen displays all Groups and Users currently associated. None indicates that no Groups and/or Users have been associated.

1. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the OK button if you do not want to associate access at this time, or click the Next button to continue.

### Associate Groups for Cabinet

Access can be assigned to a Group of Users for a specific Cabinet. One or more Groups can be associated to a specific Cabinet.

Note 1: If you are not associating Group(s) to this Cabinet but need to associate individual Users, click the Next button to continue.

Note 2: Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of this Cabinet and see which Folders and Documents are in this Cabinet.
<b>Modify</b>	A User can modify the attributes of this Cabinet. The User must also have the Modify Cabinet privilege.
<b>Delete</b>	A User can delete this Cabinet. The User must also have the Delete Cabinet privilege.
<b>Create Folder</b>	A User can create a Folder in this Cabinet. The User must also have the Create Folder privilege.
<b>Create Document</b>	A User can create a Document in this Cabinet. The User must also have the Create Document privilege.
<b>Owner</b>	A User can act as the owner of this Cabinet. The User will be able to do anything to the Cabinet that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users on the Group from accessing this Cabinet. Because a logged in User is always considered to be part of the Local group, if \*Local Users (R) is associated to the Cabinet, the User will still get Read access to the Cabinet even though None prevents them from getting any other type of access.

If you specify None, the Users on this Group will have no access to the Cabinet even if the Users are on other Groups that are associated to this Cabinet. However, if an individual User is associated to this Cabinet on the next screen, that access will override the access given to them on this screen. If a User on the Group is the Owner of the Cabinet, or an Admin, they will still have Owner access to the Cabinet.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Select the access (Read, Modify, Delete, Create Folder, Create Document, or Owner) to be assigned to the Group. One or more access can be assigned to the same Group. Note: Everyone on the Group will get the assigned access.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: Assigning the Group the access of Modify, Delete, Create Folder, Create Document, or Owner also gives Read access to the Group. The Group name and assigned access is displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name (R)</b>	MG (My Groups), (R) Read
<b>MG-Group Name (R,M)</b>	MG (My Groups), (R,M) Read, Modify
<b>MG-Group Name (R,D)</b>	MG (My Groups), (R,D) Read, Delete
<b>MG-Group Name (R,CF)</b>	MG (My Groups), (R,CF) Read, Create Folder
<b>MG-Group Name (R,CD)</b>	MG (My Groups), (R,CD) Read, Create Document
<b>MG-Group Name (O)</b>	MG (My Groups), (O) Owner

<b>SG-Group Name (R)</b>	SG (Shared Groups), (R) Read
<b>SG-Group Name (R,M)</b>	SG (Shared Groups), (R,M) Read, Modify
<b>SG-Group Name (R,D)</b>	SG (Shared Groups), (R,D) Read, Delete
<b>SG-Group Name (R,CF)</b>	SG (Shared Groups), (R,CF) Read, Create Folder
<b>SG-Group Name (R,CD)</b>	SG (Shared Groups), (R,CD) Read, Create Document
<b>SG-Group Name (O)</b>	SG (Shared Groups), (O) Owner

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associating Access for Individual Users for a Cabinet

Access can be assigned to individual Users for a specific Cabinet. One or more Users can be associated to a specific Cabinet.

Note: Definition of access is listed below:

<b>Access</b>	<b>Definition of Access</b>
<b>Read</b>	A User can view the attributes of this Cabinet and see which Folders and Documents are in this Cabinet.
<b>Modify</b>	A User can modify the attributes of this Cabinet. The User must also have the Modify Cabinet privilege.
<b>Delete</b>	A User can delete this Cabinet. The User must also have the Delete Cabinet privilege.
<b>Create Folder</b>	A User can create a Folder in this Cabinet. The User must also have the Create Folder privilege.
<b>Create Document</b>	A User can create a Document in this Cabinet. The User must also have the Create Document privilege.
<b>Owner</b>	A User can act as the owner of this Cabinet. The User will be able to do anything to the Cabinet that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users from accessing this Cabinet. Because a logged in User is always considered part of the Local group, if \*Local Users



(R) is associated to the Cabinet, the User will still get Read access to the Cabinet even though None prevents them from getting any other type of access.

If you specify None, the User will have no access to this Cabinet even if the User appears on a Group that gives them other access. If the User is the Owner of the Cabinet, or an Admin, they will still have Owner access to the Cabinet.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users Group. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

Note: Additional security can be added to the Folder by removing \*Local Users (R) in the Selected Users box. (R) indicates Read access.

Read Access	Definition of Read Access
<b>*Local Users (R)</b>	Users that have an account to this Document Manager can view the attributes of this Cabinet and see subfolders and Documents in this Cabinet.

1. Select the User(s) in the Available Users box (on the left) to be associated to the Folder by clicking on the User's name. This will highlight the name.
2. Select the access (Read, Modify, Delete, Create Folder, Create Document, or Owner) to be assigned to the User. More than one access can be assigned to the same User.
3. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.

Note: Assigning the User the access of Modify, Delete, Create Folder, Create Document, or Owner also gives Read access to the User. The User's name and assigned access is displayed in the Selected Users box as follows:

Selected Users	Definition of Codes
<b>User's Name(R)</b>	User has Read access
<b>User's Name(R,M)</b>	User has Read and Modify access
<b>User's Name(R,D)</b>	User has Read and Delete access
<b>User's Name(R,CF)</b>	User has Read and Create Folder access

<b>User's Name(R,CD)</b>	User has Read and Create Document access
<b>User's Name(O)</b>	User has Owner access

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access list to this Cabinet.

Notes:

- The access to the Cabinet will be updated.
- A history record will be generated for associating access with the Cabinet.
- Email will be sent to the notification associated with the Cabinet.

#### 4.1.4. Associating Access for a Group

Access is assigned to a Group to determine which Users have Owner access to the Group. It is important to note that the owner of a Group and Users with the Admin privilege always have full access to the Group.

- The User must have the Groups privilege.
- The User must have Owner access to the Group.

**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > Assoc Access]*

The Associate Access screen displays all Users that are currently associated to the Group. None indicates that no Users have been associated.

Associating Access for Individual Users for a Group

If necessary, Owner access can be assigned to individual Users for a specific Group. One or more Users can be associated to a specific Group. A User with Owner access can act as the owner of this Group. The User will be able to do anything to the Group that the owner can, as long as the User's privileges allow it.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users Group. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be associated to the Document by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected

Users box. To show information for the User, highlight the User name, and click the Show User button.

Selected Users	Definition of Codes
User's Name(O)	User has Owner access

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access to this Group.

Notes:

- The access to the Group will be updated.
- A history record will be generated for associating access with the Group.

#### 4.1.5. Associating Access for an RMA Record Set

Access is assigned to an RMA Record Set to determine what Users can do with the RMA Record Set. However, access does not guarantee that the relevant commands can be used on the RMA Record Set. For example, a User is given Create Record access to a RMA Record Set but the User cannot create a Record in the RMA Record Set unless the User also has the privilege Records. It is important to note that the owner of an RMA Record Set, and Users with the Records Manager or Admin privilege always have full access to a RMA Record Set unless it's frozen.

- The User must have the Groups privilege.
- The User must have Owner access to the RMA Record Set.

**Navigation:** *[DocMgr > Records > Show... > Select Desired RMA Record Set > Side Menu > Assoc Access]*

The Associate Access screen displays all Groups and Users that have been associated.

1. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Associate Groups for RMA Record Set

Access can be assigned to a Group of Users for a specific RMA Record Set. One or more Groups can be associated to a specific RMA Record Set.

Note 1: If you are not associating Group(s) to this RMA Record Set but need to associate individual Users, click the Next button to continue.

Note 2: Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of this RMA Record Set and see which Records are in this RMA Record Set.
<b>Modify</b>	A User can modify the attributes of this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>Delete</b>	A User can delete this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>Create Record</b>	A User can create a Record in this RMA Record Set. The User must also have the Records or Record Manager privilege.
<b>Owner</b>	A User can act as the owner of this RMA Record Set. The User will be able to do anything to the RMA Record Set that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access to Users on the Group from accessing this RMA Record Set.

If you specify None, the Users on this Group will have no access to the RMA Record Set even if the Users are on other Groups that are associated to this RMA Record Set. However, if an individual User is associated to this RMA Record Set on the next screen, that access will override the access given to them on this screen. If a User on the Group is the owner of the RMA Record Set, a Records Manager, or an Admin, they will still have Owner access to the RMA Record Set.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.

2. Select the access (None, Read, Modify, Delete, Create Record, or Owner) to be assigned to the Group. One or more access can be assigned to the same Group. Note: Everyone on the Group will get the assigned access.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: Assigning a Group the access of Modify, Delete, Create Record, or Owner also gives Read access to the Group. The Group name and assigned access is displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name (R)</b>	MG (My Groups), (R) Read
<b>MG-Group Name (R,M)</b>	MG (My Groups), (R,M) Read, Modify
<b>MG-Group Name (R,D)</b>	MG (My Groups), (R,D) Read, Delete
<b>MG-Group Name (R,CR)</b>	MG (My Groups), (R,CR) Read, Create Record
<b>MG-Group Name (O)</b>	MG (My Groups), (O) Owner
<b>SG-Group Name (R)</b>	SG (Shared Groups), (R) Read
<b>SG-Group Name (R,M)</b>	SG (Shared Groups), (R,M) Read, Modify
<b>SG-Group Name (R,D)</b>	SG (Shared Groups), (R,D) Read, Delete
<b>SG-Group Name (R,CR)</b>	SG (Shared Groups), (R,CR) Read, Create Record
<b>SG-Group Name (O)</b>	SG (Shared Groups), (O) Owner

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associate Access for Individual Users for RMA Record Set

Access can be assigned to individual Users for a specific RMA Record Set. One or more Users can be associated to a specific RMA Record Set.

Note: Definition of access is listed below:

Access	Definition of Access
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<b>Read</b>	A User can view the attributes of this RMA Record Set and see which Records are in this RMA Record Set.
<b>Modify</b>	A User can modify the attributes of this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>Delete</b>	A User can delete this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>Create Record</b>	A User can create a Record in this RMA Record Set. The User must also have the Records or Record Manager privilege.
<b>Owner</b>	A User can act as the owner of this RMA Record Set. The User will be able to do anything to the RMA Record Set that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access to Users from accessing this RMA Record Set.

If you specify None, the User will have no access to this RMA Record Set even if the User appears on a Group that gives them other access. If the User is the owner of the RMA Record Set, a Records Manager, or an Admin, they will still have Owner access to the RMA Record Set.

Note: Available Users are Users that have a TechDoc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be associated to the RMA Record Set by clicking on the User's name. This will highlight the name.
2. Select the access (None, Read, Modify, Delete, Create Record, or Owner) to be assigned to the User. More than one access can be assigned to the same User.
3. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.

Note: Assigning the User the access of Modify, Delete, Create Record, or Owner also gives Read access to the User. The User's name and assigned access is displayed in the Selected Users box as follows:

<b>Selected Users</b>	<b>Definition of Codes</b>
<b>User's Name(R)</b>	User has Read access

<b>User's Name(R,M)</b>	User has Read and Modify access
<b>User's Name(R,D)</b>	User has Read and Delete access
<b>User's Name(R,CR)</b>	User has Read and Create Record access
<b>User's Name(O)</b>	User has Owner access

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access list to this RMA Record Set.

Notes:

- The access to the RMA Record Set will be updated.
- A history record will be generated for associating access with the RMA Record Set.

#### 4.1.6. Associating Access for a Project

Access is assigned to a Project to determine which Users are allowed a particular level of access to the Project. However, access does not guarantee that the relevant commands can be used on the Project. For example, a User is given Add Document access to a Project but the User cannot add a Document unless the User also has the Projects User privilege. It is important to note that the owner of a Project and Users with the Projects Manager or Admin privilege always have full access to the Project.

- The User must have the Groups privilege.
- The User must have Owner access to the Project.

**Navigation:** *[DocMgr > Projects > Select Desired Project > Side Menu > Assoc Access]*

The Associate Access screen displays all Groups and Users that have been associated.

- Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
- Click the Cancel button to cancel the command, or click the Next button to continue.

#### Associating Groups for a Project

Access can be assigned to a Group of Users for a specific Project. One or more Groups can be associated to a specific Project.

Note 1: If you are not associating Group(s) to this Project but need to associate individual Users, click the Next button to continue.

Note 2: Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of this Project.
<b>Modify</b>	A User can modify the attributes of this Project. The User must also have the Project privilege.
<b>Delete</b>	A User can delete this Project. The User must also have the Project privilege.
<b>Add Document</b>	A User can add Documents to this Project. The User must also have the Project privilege.
<b>Remove Document</b>	A User can remove Documents from this Project. The User must also have the Project privilege.
<b>Owner</b>	A User can act as the owner of this Project. The User will be able to do anything to the Project that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users on the Group from accessing this Project. Because a logged in User is always considered to be part of the Local group, if \*Local Users (R) is associated to the Project, the User will still get Read access to the Project even though None prevents them from getting any other type of access.

If you specify None, the Users on this Group will have no access to the Project even if the Users are on other Groups that are associated to this Project. However, if an individual User is associated to this Project on the next screen, that access will override the access given to them on this screen. If a User on the Group is the Owner of the Project, or an Admin, they will still have Owner access to the Project.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a TechDoc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.



1. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Select the access (Read, Modify, Delete, Add Document, Remove Document, or Owner) to be assigned to the Group. One or more access can be assigned to the same Group.  
Note: Everyone on the Group will get the assigned access.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: Assigning the Group the access of Modify, Delete, Add Document, Remove Document, or Owner also gives Read access to the Group. The Group name and assigned access is displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name (R)</b>	MG (My Groups), (R) Read
<b>MG-Group Name (R,M)</b>	MG (My Groups), (R,M) Read, Modify
<b>MG-Group Name (R,D)</b>	MG (My Groups), (R,D) Read, Delete
<b>MG-Group Name (R,AD)</b>	MG (My Groups), (R,AD) Read, Add Document
<b>MG-Group Name (R,RD)</b>	MG (My Groups), (R,RD) Read, Remove Document
<b>MG-Group Name (O)</b>	MG (My Groups), (O) Owner
<b>SG-Group Name (R)</b>	SG (Shared Groups), (R) Read
<b>SG-Group Name (R,M)</b>	SG (Shared Groups), (R,M) Read, Modify
<b>SG-Group Name (R,D)</b>	SG (Shared Groups), (R,D) Read, Delete
<b>SG-Group Name (R,AD)</b>	SG (Shared Groups), (R,AD) Read, Add Document
<b>SG-Group Name (R,RD)</b>	SG (Shared Groups), (R,RD) Read, Remove Document
<b>SG-Group Name (O)</b>	SG (Shared Groups), (O) Owner

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Access for Individual Users for a Project

Access can be assigned to individual Users for a specific Project. One or more Users can be associated to a specific Project.

Note: Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of this Project.
<b>Modify</b>	A User can modify the attributes of this Project. The User must also have the Project privilege.
<b>Delete</b>	A User can delete this Project. The User must also have the Project privilege.
<b>Add Document</b>	A User can add Documents to this Project. The User must also have the Project privilege.
<b>Remove Document</b>	A User can remove Documents from this Project. The User must also have the Project privilege.
<b>Owner</b>	A User can act as the owner of this Project. The User will be able to do anything to the Project that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users from accessing this Project. Because a logged in User is always considered part of the Local group, if \*Local Users (R) is associated to the Project, the User will still get Read access to the Project even though None prevents them from getting any other type of access.

If you specify None, the User will have no access to this Project even if the User appears on a Group that gives them other access. If the User is the Owner of the Project, or an Admin, they will still have Owner access to the Project.

Note: Available Users are Users that have a TechDoc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

Note: Additional security can be added to the Project by removing \*Local Users (R) in the Selected Users box. (R) indicates Read access.

Read Access	Definition of Read Access
<b>*Local Users (R)</b>	Users that have an account to this Document Manager can view the attributes of this Project.

1. Select the User(s) in the Available Users box (on the left) to be associated to the Folder by clicking on the User's name. This will highlight the name.
2. Select the access (Read, Modify, Delete, Add Document, Remove Document, or Owner) to be assigned to the User. More than one access can be assigned to the same User.
3. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.

Note: Assigning the User the access of Modify, Delete, Add Document, Remove Document, or Owner also gives Read access to the User. The User's name and assigned access is displayed in the Selected Users box as follows:

Selected Users	Definition of Codes
User's Name(R)	User has Read access
User's Name(R,M)	User has Read and Modify access
User's Name(R,D)	User has Read and Delete access
User's Name(R,AD)	User has Read and Add Document access
User's Name(R,RD)	User has Read and Remove Document access
User's Name(O)	User has Owner access

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access list to this Project.

#### Notes:

- The access to the Project will be updated.
- A history record will be generated for associating access with the Project.
- Email will be sent to the notification associated with the Project.

### 4.1.7. Associating Document Default Access

Access is assigned to a Cabinet or Folder to determine which Users are allowed a particular level of access to the Documents in this Cabinet or Folder. Document Default Access allows you to set the default access on a Cabinet or Folder. All access associations made here will be automatically set on child Documents created within this Cabinet or Folder. Folders created within this Cabinet or Folder will receive the Document Default Access of this Cabinet or Folder.

The Folder Inheritance field is used to specify if the access associated should also be applied to the child folders. Using the drop down, select one of the following options:

- Do not change child folders associations - Says that only this cabinet or folder will receive association changes and all child folders under this cabinet or folder will be left unchanged.
- Replace child folders associations with these - Says to replace all child folders' associations with the associations on this cabinet or folder.
- Merge these associations with child folders associations - Says to merge the associations of this cabinet or folder with the child folders' associations; in the case of access, any matching people will receive the combination of access specified by this cabinet or folder and the child folder.
- Override collisions while adding these to child folders associations - Says to add this cabinet's or folder's associations to the child folders' associations; in the case of access, any matching people will receive the access specified by the parent.

The Document Inheritance field is used to specify if the access associated should also be applied to the child documents. Using the drop down, select one of the following options:

- Do not change child documents associations - Says that only this cabinet or folder will receive association changes and all child documents under this cabinet or folder will be left unchanged.
- Replace child documents associations with these - Says to replace all child documents' associations with the associations on this cabinet or folder.
- Merge these associations with child documents associations - Says to merge the associations of this cabinet or folder with the child documents' associations; in the case of access, any matching people will receive the combination of access specified by this cabinet or folder and the child document.
- Override collisions while adding these to child documents associations - Says to add this cabinet's or folder's associations to the child documents' associations; in the case of access, any matching people will receive the access specified by the parent.

**Navigation:** [*DocMgr > Explorer > Navigate to Cabinet or Folder > Side Menu > Doc Default Access*]

The Document Default Access screen displays all Groups, Users, and Remotes Users currently associated to the Cabinet or Folder. None indicates that no Groups, Users, and/or Remotes Users have been associated.

- The User must have Owner access to the Cabinet or Folder.
1. Enter the type of Folder Inheritance to use on child folders by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
  2. Enter the type of Document Inheritance to use on child documents by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
  3. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
  4. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Associating Groups for Documents

Access can be assigned to a Group of Users for on a specific Cabinet or Folder for the Documents contained within that Cabinet or Folder. One or more Groups can be associated to a specific Cabinet or Folder.

Note 1: If you are not associating Group(s) to this Cabinet or Folder but need to associate individual Users or Remote Users, click the Next button to continue.

Note 2: Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of the Documents.
<b>Modify</b>	A User can modify the attributes of Documents. The User must also have the Modify Document privilege.
<b>Delete</b>	A User can delete the Documents. The User must also have the Delete Document privilege.
<b>Reserve/Replace</b>	A User can reserve and replace the Documents.
<b>Owner</b>	A User can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users on the Group from accessing the Documents. Because a logged in User is always considered to be part of the Local group, if \*Local Users (R) is associated to the Cabinet or Folder, the User will still get Read access to the Documents even though None prevents them from getting any other type of access.

If you specify None, the Users on this Group will have no access to the Documents even if the Users are on other Groups that are associated to the Documents. However, if an individual User is associated to Documents on the next screen, that access will override the access given to them on this screen. If a User on the Group is the Owner of the Documents, or an Admin, they will still have Owner access to the Documents.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Select the access (Read, Modify, Delete, Reserve/Replace, or Owner) to be assigned to the Group. One or more access can be assigned to the same Group. Note: Everyone on the Group will get the assigned access.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: Assigning the Group the access of Modify, Delete, Reserve/Replace, or Owner also gives Read access to the Group. The Group name and assigned access is displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name (R)</b>	MG (My Groups), (R) Read
<b>MG-Group Name (R,M)</b>	MG (My Groups), (R,M) Read, Modify

<b>MG-Group Name (R,D)</b>	MG (My Groups), (R,D) Read, Delete
<b>MG-Group Name (R,RR)</b>	MG (My Groups), (R,RR) Read, Reserve/Replace
<b>MG-Group Name (O)</b>	MG (My Groups), (O) Owner
<b>SG-Group Name (R)</b>	SG (Shared Groups), (R) Read
<b>SG-Group Name (R,M)</b>	SG (Shared Groups), (R,M) Read, Modify
<b>SG-Group Name (R,D)</b>	SG (Shared Groups), (R,D) Read, Delete
<b>SG-Group Name (R,RR)</b>	SG (Shared Groups), (R,RR) Read, Reserve/Replace
<b>SG-Group Name (O)</b>	SG (Shared Groups), (O) Owner

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associating Users for Documents

Access can be assigned to individual Users on a specific Cabinet or Folder for the Documents contained within that Cabinet or Folder. One or more Users can be associated to a specific Cabinet or Folder.

Note: Definition of access is listed below:

<b>Access</b>	<b>Definition of Access</b>
<b>Read</b>	A User can view the attributes of the Documents.
<b>Modify</b>	A User can modify the attributes of Documents. The User must also have the Modify Document privilege.
<b>Delete</b>	A User can delete the Documents. The User must also have the Delete Document privilege.
<b>Reserve/Replace</b>	A User can reserve and replace the Documents.
<b>Owner</b>	A User can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read) to Users from accessing the Documents. Because a logged in User is always considered part of the Local group, if \*Local

Users (R) is associated to the Documents, the User will still get Read access to the Documents even though None prevents them from getting any other type of access.

If you specify None, the User will have no access to the Documents even if the User appears on a Group that gives them other access. If the User is the Owner of the Documents, or an Admin, they will still have Owner access to the Documents.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

Note: Additional security can be added to the Documents by removing \*Local Users (R) in the Selected Users box. (R) indicates Read access.

Read Access	Definition of Read Access
<b>*Local Users (R)</b>	Users that have an account to this Document Manager can view the attributes of the Documents.

1. Select the User(s) in the Available Users box (on the left) to be associated to the Folder by clicking on the User's name. This will highlight the name.
2. Select the access (Read, Modify, Delete, Reserve/Replace, or Owner) to be assigned to the User. More than one access can be assigned to the same User.
3. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.

Note: Assigning the User the access of Modify, Delete, Reserve/Replace, or Owner also gives Read access to the User. The User's name and assigned access is displayed in the Selected Users box as follows:

Selected Users	Definition of Codes
User's Name(R)	User has Read access
User's Name(R,M)	User has Read and Modify access
User's Name(R,D)	User has Read and Delete access
User's Name(R,RR)	User has Reserve/Replace access
User's Name(O)	User has Owner access



4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Remote Users for Documents

Read access for fetching Documents can be assigned to individual Remote Users on a Cabinet or Folder for the Documents within the Cabinet or Folder. One or more Remote Users can be associated to a specific Cabinet or Folder.

Note: If you do not need to associate Remote Users to the Documents in this Cabinet or Folder, click the OK button to associate the access Group and/or Users on this Cabinet or Folder.

The Remote User fields displayed are:

- Any Remote User previously associated are displayed in the Remote User field.
- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. Click the Add button.

Note: The username can contain wildcards.

- The asterisk (\*) represents zero or more characters.
- The question mark (?) represents exactly one character.
- Multiple asterisks and/or question marks are allowed.
- Consecutive asterisks are not allowed but consecutive question marks are allowed.
- Only an asterisk is allowed.
- Asterisks and question marks may be positioned anywhere as long as they do not break any of the previous rules.

For example, if you would like to give access to a User on the kerberos domain, you would select kerberos from the drop down and then enter the username in the username field. The resulting Remote User would display as kerberos/username when showing associations.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the document access on this Cabinet or Folder.

Note: You will need to notify the Remote User(s) that they have been given Read access for fetching the Documents. When a Remote User is fetching or displaying the status and retrieval form from a link either in an email or from a search page, if the User is not currently logged in to the DM, they are prompted with a username and password dialog box. If the User types in a valid Remote username and password, they are granted access.

For example, if `kerberos/jdoe` has been associated as a Remote User to a Document and they attempt to fetch that Document, while not logged in to the DM, they will be prompted for username and password. If they type in `kerberos/jdoe` into the username and a valid password for `jdoe` on `kerberos`, then they will be granted fetch and/or status and retrieval access to the Document. If the User cannot be verified by the remote Authenticator, the corresponding error message is displayed. (User not found, incorrect password, server not found...)

Notes:

- The document default access on the Cabinet or Folder will be updated.
- The document default access on the child Folders within this Cabinet or Folder will be updated if selected to using the Folder Inheritance drop down.
- The access on the child Documents within this Cabinet or Folder will be updated if selected to using the Document Inheritance drop down.

#### 4.1.8. Associating Access for a Form

Access is assigned to a Form to determine which Users are allowed a particular level of access to the Form. It also sets the Read and Form Submitter access to the Form. However, access does not guarantee that the relevant commands can be used on the Form. For example, a User is given Modify access to a Form but the User cannot modify the Form unless the User has the User privilege of Forms. It is important to note that the owner of a Form and Users with the Admin privilege always have full access to the Form.

- The User must have the Forms privilege.
- The User must have Owner access to the Form.
- To associate access to remote Users, the `AllowAssocRemoteAccess` System Property must be set to Yes.

The Associate Access screen displays all Groups, Users and Remote Users (Remote Users will only be displayed if the `AllowAssocRemoteAccess` System Property is set to Yes). None indicates that no Groups, Users and/or Remote Users have been associated.

**Navigation:** *[DocMgr > Forms > Navigate to Desired Form > Side Menu > Assoc Access]*

1. Enter the reason for associating access in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the Next button to continue.

## Associating Groups for a Form

Access can be assigned to a Group of Users for a specific Form. One or more Groups can be associated to a specific Form.

Note 1: If you are not associating Group(s) to this Form but need to associate individual Users, click the Next button to continue.

Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of this Form.
<b>Modify</b>	A User can modify the attributes of this Form. The User must also have the Forms privilege.
<b>Delete</b>	A User can delete this Form. The User must also have the Forms privilege.
<b>View Submissions</b>	A User can view all the completed submissions of the Form. The User must also have the Forms privilege. Note: Form Submissions can contain very sensitive data. It's important to understand what data is being collected and who should have access to that data before issuing View Submissions access.
<b>Form Submitter</b>	A User can create a submission of the Form.
<b>Office Use 1 - Office Use 10</b>	Can be used internally inside the form to specify an arbitrary level of access the user must have to enter/modify data in one or more form fields. See the DocuBrain TechDoc Electronic Form specification for further details.
<b>Owner</b>	A User can act as the owner of this Form. The User will be able to do anything to the Form that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read or form submitter) to Users on the Group from accessing this Form. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Form, the User will still get Read and Form Submitter access to the Form even though None prevents them from getting any other type of access.

If you specify None, the Users on this Group will have no access to the Form even if the Users are on other Groups that are associated to this Form. However, if an individual User is associated to this Form on the next screen, that access will override the access given to them on this screen. If a User on the Group is the Owner of the Form, or an Admin, they will still have Owner access to the Form.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a TechDoc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Select the access (Read, Modify, Delete, etc.) to be assigned to the Group. One or more access can be assigned to the same Group. Note: Everyone on the Group will get the assigned access.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, select the Group, and click the Show Group button.

Note: Assigning the Group the access of Modify, Delete, Reserve/Replace or Owner also gives Read access to the Group. The Group name and assigned access is displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name (R)</b>	MG (My Groups), (R) Read
<b>MG-Group Name (R,M)</b>	MG (My Groups), (R,M) Read, Modify
<b>MG-Group Name (R,D)</b>	MG (My Groups), (R,D) Read, Delete
<b>MG-Group Name (R,VS)</b>	MG (My Groups), (R,VS) Read, View Submissions
<b>MG-Group Name (R,FS)</b>	MG (My Groups), (R,FS) Read, Form Submitter
<b>MG-Group Name (OU1)</b>	MG (My Groups), (OU1) Office Use 1

<b>MG-Group Name (O)</b>	MG (My Groups), (O) Owner
<b>SG-Group Name (R)</b>	SG (Shared Groups), (R) Read
<b>SG-Group Name (R,M)</b>	SG (Shared Groups), (R,M) Read, Modify
<b>SG-Group Name (R,D)</b>	SG (Shared Groups), (R,D) Read, Delete
<b>SG-Group Name (R,VS)</b>	SG (Shared Groups), (R,VS) Read, View Submissions
<b>SG-Group Name (R,FS)</b>	SG (Shared Groups), (R,FS) Read, Form Submitter
<b>SG-Group Name (OU1)</b>	SG (Shared Groups), (OU1) Office Use 1
<b>SG-Group Name (O)</b>	SG (Shared Groups), (O) Owner

- Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associating Access for Individual Users for a Form

If necessary, access can be assigned to individual Users for a specific Form. One or more Users can be associated to a specific Form.

Definition of access is listed below:

<b>Access</b>	<b>Definition of Access</b>
<b>Read</b>	A User can view the attributes of this Form.
<b>Modify</b>	A User can modify the attributes of this Form. The User must also have the Forms privilege.
<b>Delete</b>	A User can delete this Form. The User must also have the Forms privilege.
<b>View Submissions</b>	A User can view all the completed submissions of the Form. The User must also have the Forms privilege. Note: Form Submissions can contain very sensitive data. It's important to understand what data is being collected and who should have access to that data before issuing View Submissions access.
<b>Form Submitter</b>	A User can create a submission of the Form.
<b>Office Use 1 - Office Use 10</b>	Can be used internally inside the form to specify an arbitrary level of access the user must have to enter/modify data in one or more form

	fields. See the DocuBrain TechDoc Electronic Form specification for further details.
<b>Owner</b>	A User can act as the owner of this Form. The User will be able to do anything to the Form that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access (except possibly for read or form submitter) to Users from accessing this Form. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Form, the User will still get Read and Form Submitter access to the Form even though None prevents them from getting any other type of access.

If you specify None, the User will have no access to this Form even if the User appears on a Group that gives them other access. If the User is the Owner of the Form, or an Admin, they will still have Owner access to the Form.

Note: Available Users are Users that have a TechDoc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

Note: Additional security can be added to the Form by adding or removing \*Campus Users (R), \*Community Users (R), \*Local Users (R), \*Campus Users (FS), \*Community Users (FS), or \*Local Users (FS) in the Selected Users list. (R) indicates Read access (FS) indicates Form Submitter access.

<b>Read Access</b>	<b>Definition of Read Access</b>
<b>*Local Users (FS)</b>	Forms available for submission to Users that have an account to the Document Manager.
<b>*Campus Users (FS)</b>	Forms available for submission to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.
<b>*Community Users (FS)</b>	Forms available for submission to Users within the organization's and selected partners IP addresses.
<b>*Global Users (FS)</b>	Forms available for submission to anyone on the World Wide Web.
<b>*Local Users (R)</b>	Forms available to Users that have an account to the Document Manager.

<b>*Campus Users (R)</b>	Forms available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.
<b>*Community Users (R)</b>	Forms available to Users within the organization's and selected partners IP addresses.
<b>*Global Users (R)</b>	Forms available to anyone on the World Wide Web.

1. Select the User(s) in the Available Users box (on the left) to be associated to the Form by clicking on the User's name. This will highlight the name.
2. Select the access (Read, Modify, Delete, etc.) to be assigned to the User. More than one access can be assigned to the same User.
3. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.

Note: Assigning the User the access of Modify, Delete, View Submissions, Form Submitter, Office Use X or Owner also gives Read access to the User. The User's name and assigned access is displayed in the Selected Users box as follows:

<b>Selected Users</b>	<b>Definition of Codes</b>
<b>User's Name(R)</b>	User has Read access
<b>User's Name(R,M)</b>	User has Read and Modify access
<b>User's Name(R,D)</b>	User has Read and Delete access
<b>User's Name(R,VS)</b>	User has Read and View Submissions access
<b>User's Name(R,FS)</b>	User has Read and Form Submitter access
<b>User's Name(R,OU1)</b>	User has Read and Office Use 1 access
<b>User's Name(O)</b>	User has Owner access

Note: If the AllowAssocRemoteAccess System Property is set to No, the following will be displayed.

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access Groups and/or Users to this Form.

or

Note: If the AllowAssocRemoteAccess System Property is set to Yes, the following will be displayed.

5. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Access for Remote Users for a Form

Read and Form Submitter access for submitting Forms can be assigned to individual remote Users for a specific Form. One or more Remote Users can be associated to a specific Form.

Note: If you do not need to associate Remote Users to this Form, click the OK button to associate the access Group and/or Users to this Form.

The Remote User fields displayed are:

- Any Remote User previously associated to this Form is displayed in the Remote User field.
- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. Click the Add button.

Note: The username can contain wildcards.

- The asterisk (\*) represents zero or more characters.
- The question mark (?) represents exactly one character.
- Multiple asterisks and/or question marks are allowed.
- Consecutive asterisks are not allowed but consecutive question marks are allowed.
- Only an asterisk is allowed.
- Asterisks and question marks may be positioned anywhere as long as they do not break any of the previous rules.

For example, if you would like to give access to a User on the kerberos domain, you would select kerberos from the drop down and then enter the username in the username field. The resulting Remote User would display as kerberos/username when showing associations.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.



Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate the access list and/or User to this Form.

Note: You will need to notify the Remote User(s) that they have been given Read and Form Submitter access for submitting this Form. When a Remote User is creating/resuming a form submission, if the User is not currently logged in to the DM, they are prompted with a username and password dialog box. If the User types in a valid Remote username and password, they are granted access.

For example, if kerberos/jdoe has been associated as a Remote User to a Form and they attempt to create a submission of that Form, while not logged in to the DM, they will be prompted for username and password. If they type in kerberos/jdoe into the username and a valid password for jdoe on kerberos, then they will be granted read and form submitter access to the Form. If the User cannot be verified by the remote Authenticator, the corresponding error message is displayed. (User not found, incorrect password, server not found...)

Notes:

- The access to the Form will be updated.
- A history record will be generated for associating access with the Form.
- Email will be sent to the notification associated with the Form.

#### 4.1.9. Showing Associations

Show Associations displays the access, commenters, distribution, and notification associated to Documents, Folders, Cabinets, etc where applicable.

##### ***Showing the Associations for a Document***

Show Associations displays the access, commenters, distribution, and notification that are associated to this Document.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Show Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Document.

Note:

Show Associations displays the associations at the Document level. For example, if the Document is set to allow Read access by community Users. \*Community Users (R) would be displayed at the Document level. However, when you restrict a Generation it does not allow Read access by community Users. To show associations for a specific Generation, from the Document Menu click on Explore, click on the Generation you want to show associations for,

and click on Show Assoc. Now \*Community Users (R) will not be displayed because this is a restricted Generation.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Document, view the attributes of this Document's Generations and Renditions and fetch this Document's Generations and Renditions.
<b>(M)Modify</b>	A User can modify the attributes of this Document and this Document's Generations and Renditions. The User must also have the Modify Document privilege.
<b>(D)Delete</b>	A User can delete this Document. The User must also have the Delete Document privilege.
<b>(RR)Reserve/Replace</b>	A User can reserve and replace the Document. The User must also have the Create Generation privilege.
<b>Owner</b>	A User can act as the owner of this Document. The User will be able to do anything to the Document that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Documents are available to Users that have an account on the Document Manager.
<b>*Campus Users (R)</b>	Documents are available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.
<b>*Community Users (R)</b>	Documents are available to Users within the organization and selected partners IP addresses.
<b>*Global Users (R)</b>	Documents are available to anyone on the World Wide Web.

Note:

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Document. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Document, the User will still get Read access to the Document even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Document even if the Users are on other Groups that are associated to this Document. However, if an individual User is associated to the Document that access will override the access given to them if they are also on a Group that is associated to this Document.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Document. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Document, the User will still get Read access to the Document even though None prevents them from getting any other type of access. The Users will have no access to this Document even if the User appears on a Group that gives them other access.

#### Access for a Document

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Users have been associated to a Document, they will be listed below the Users on the Access for Document screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.
- None indicates that no Groups or Users have been associated.

#### Commenters for a Document

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

#### Distribution for a Document

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Notification for a Document

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.

- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Showing the Associations for a Folder

Show Associations displays the Access and Notification that are associated to this Folder as well as the Document Default Access, Commenters, Notification, and Distribution. Documents created in this Folder will be given the Access, Commenters, Notification, and Distribution set by the Document Defaults on this Folder. Folders created in this Folder will be given the Document Defaults on this Folder.

**Navigation:** *[DocMgr > Explorer > Select Desired Folder > Side Menu > Show Associations]*

- The User must have the Groups privilege.
- The User must have Read access to the Folder.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Folder and see which subfolders and Documents are in this Folder.
<b>(M)Modify</b>	A User can modify the attributes of this Folder. The User must also have the Modify Folder privilege.
<b>(D)Delete</b>	A User can delete this Folder. The User must also have the Delete Folder privilege.
<b>(CF)Create Folder</b>	A User can create a child Folder in this Folder. The User must also have the Create Folder privilege.
<b>(CD)Create Document</b>	A User can create a Document in this Folder. The User must also have the Create Document privilege.
<b>(O)Owner</b>	A User can act as the owner of this Folder. The User will be able to do anything to the Folder that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Folder is available to Users that have an account to the Document Manager.

Note:

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Folder. Because a logged in User is always considered part of the Local group, if

\*Local Users (R) is associated to the Folder, the User will still get Read access to the Folder even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Folder even if the Users are on other Groups that are associated to this Folder. However, if an individual User is associated to the Folder that access will override the access given to them if they are also on a Group that is associated to this Folder.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Folder. Because a logged in User is always considered part of the local group, if \*Local Users (R) is associated to the Folder, the User will still get Read access to the Folder even though None prevents them from getting any other type of access. The Users will have no access to this Folder even if the User appears on a Group that gives them other access.

#### Access for a Folder

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

#### Notification for a Folder

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that remote User.
- None indicates that no Groups or Users have been associated.

#### Document Default Access for a Folder

- Documents created in this Folder will automatically have their access set to the Document Default Access on this Folder.
- Folders created in this Folder will automatically have their Document Default Access set to the Document Default Access on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of the Documents.
<b>(M)Modify</b>	A User can modify the attributes of Documents. The User must also have the Modify Document privilege.
<b>(D)Delete</b>	A User can delete the Documents. The User must also have the Delete Document privilege.
<b>(RR)Reserve/Replace</b>	A User can reserve and replace the Documents.
<b>(O)Owner</b>	A User can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.

#### Document Default Commenters for a Folder

- Documents created in this Folder will automatically have their commenters set to the Document Default Commenters on this Folder.
- Folders created in this Folder will automatically have their Document Default Commenters set to the Document Default Commenters on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

#### Document Default Distribution for a Folder

- Documents created in this Folder will automatically have their distribution set to the Document Default Distribution on this Folder.
- Folders created in this Folder will automatically have their Document Default Distribution set to the Document Default Distribution on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

## Document Default Notification for a Folder

- Documents created in this Folder will automatically have their notification set to the Document Default Notification on this Folder.
- Folders created in this Folder will automatically have their Document Default Notification set to the Document Default Notification on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

## Showing the Associations for a Cabinet

Show Associations displays the Access and Notification that are associated to this Cabinet as well as the Document Default Access, Commenters, Notification, and Distribution. Documents created in this Cabinet will be given the Access, Commenters, Notification, and Distribution set by the Document Defaults on this Cabinet. Folders created in this Cabinet will be given the Document Defaults on this Cabinet.

**Navigation:** [*DocMgr > Explorer > Select Desired Cabinet > Side Menu > Show Associations*]

- The User must have the Groups privilege.
- The User must have Read access to the Cabinet.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Cabinet and see which Folders and Documents are in this Cabinet.
<b>(M)Modify</b>	A User can modify the attributes of this Cabinet. The User must also have the Modify Cabinet privilege.
<b>(D)Delete</b>	A User can delete this Cabinet. The User must also have the Delete Cabinet privilege.
<b>(CF)Create Folder</b>	A User can create a Folder in this Cabinet. The User must also have the Create Folder privilege.
<b>(CD)Create Document</b>	A User can create a Document in this Cabinet. The User must also have the Create Document privilege.

<b>(O)Owner</b>	A User can act as the owner of this Cabinet. The User will be able to do anything to the Cabinet that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Cabinet is available to Users that have an account to the Document Manager.

**Note:**

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Cabinet. Because a logged in User is always considered part of the Local group, if \*Local Users (R) is associated to the Cabinet, the User will still get Read access to the Cabinet even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Cabinet even if the Users are on other Groups that are associated to this Cabinet. However, if an individual User is associated to the Cabinet that access will override the access given to them if they are also on a Group that is associated to this Cabinet.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Cabinet. Because a logged in User is always considered part of the local group, if \*Local Users (R) is associated to the Cabinet, the User will still get Read access to the Cabinet even though None prevents them from getting any other type of access. The Users will have no access to this Cabinet even if the User appears on a Group that gives them other access.

**Access for a Cabinet**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

**Notification for a Cabinet**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

**Document Default Access for a Cabinet**



- Documents created in this Cabinet will automatically have their access set to the Document Default Access on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Access set to the Document Default Access on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of the Documents.
<b>(M)Modify</b>	A User can modify the attributes of Documents. The User must also have the Modify Document privilege.
<b>(D)Delete</b>	A User can delete the Documents. The User must also have the Delete Document privilege.
<b>(RR)Reserve/Replace</b>	A User can reserve and replace the Documents.
<b>(O)Owner</b>	A User can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.

#### Document Default Commenters for a Cabinet

- Documents created in this Cabinet will automatically have their commenters set to the Document Default Commenters on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Commenters set to the Document Default Commenters on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

#### Document Default Distribution for a Cabinet

- Documents created in this Cabinet will automatically have their distribution set to the Document Default Distribution on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Distribution set to the Document Default Distribution on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

#### Document Default Notification for a Cabinet

- Documents created in this Cabinet will automatically have their notification set to the Document Default Notification on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Notification set to the Document Default Notification on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

#### Showing the Associations for Access to a Group

Show Associations displays all of the Users associated with Owner access to this Group.

**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Group.

The Users associated with Owner access to this Group are displayed.

#### Showing Documents and Folders Associated To a Group for Access

Shows Associations shows all of the Documents and Folders that are associated to this Group for access.

**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > For Access]*

- The User must have the Groups privilege.
- The User must have Read access to the Group.

All of the Documents that use this Group for access are displayed. If the Group is a User Group, all of the Folders that use this Group for access are displayed.

### Showing Documents Associated to a Group for Commenters




Show Commenters displays all of the Documents that use this Group for commenting.

**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > For Comm]











- The User must have the Groups privilege.
- The User must have Read access to the Group.

### Documents Associated to a Group for Commenters

Note: If no Documents are associated to this Group, the following message will be displayed: "No Documents found."

- The Number and Title are displayed for each Document.
- Click on  to Explore Document.
- Click on  to Show Info of the Document.
- Click on  to Fetch Latest Generation of the Document.

Note: The following icons will be displayed if the Document: has Comments, currently reserved, or is in review.

-  indicates the Document has open Comments.  indicates the Document has closed Comments. Click on  to Show Open Comment or click on  to Show Closed Comment of the Document.
-  indicates the Document is currently reserved. Click on  to Explore Document.
-  indicates the Document is reserve and in review. Click on  to Explore Document.
-  indicates the Document is in review. Click on  to Explore Document.

### Showing the Associations for a Distribution




Show Associations displays all of the Documents associated to this distribution list.

**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > For Distr]











- The User must have the Groups privilege.
- The User must have Read access to the Group.

### Documents Associated to a Group for Distribution

Note: If no Documents are associated to this Group, the following message will be displayed: "No Documents found."

- The Number and Title are displayed for each Document.
- Click on  to Explore Document.
- Click on  to Show Info of the Document.
- Click on  to Fetch Latest Generation of the Document.

Note: The following icons will be displayed if the Document: has Comments, currently reserved, or is in review.

-  indicates the Document has open Comments.  indicates the Document has closed Comments. Click on  to Show Open Comment or click on  to Show Closed Comment of the Document.
-  indicates the Document is currently reserved. Click on  to Explore Document.
-  indicates the Document is reserve and in review. Click on  to Explore Document.
-  indicates the Document is in review. Click on  to Explore Document.

### Showing the Associations for a Notification Group


Show Associations displays all of the Folders and Documents associated to this notification list.


**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > For Notif]

- The User must have the Groups privilege.
- The User must have Read access to the Group.

### Folders Associated to a Group for Notification

Note: If no Folders are associated to this Group, the following message will be displayed: "No Folders found."

- The Name and Description are displayed for each Folder.
- Click on  to Explore Folder.




- Click on  to Show Info of the Folder.

Note: If the notification list is associated to a Cabinet, the following item will be displayed.











- Click on  to Show Info of the Cabinet.

### Documents Associated to a Group for Notification

Note: If no Documents are associated to this Group, the following message will be displayed: "No Documents found."

- The Number and Title are displayed for each Document.
- Click on  to Explore Document.
- Click on  to Show Info of the Document.
- Click on  to Fetch Latest Generation of the Document.

Note: The following icons will be displayed if the Document: has Comments, currently reserved, or is in review.

-  indicates the Document has open Comments.  indicates the Document has closed Comments. Click on  to Show Open Comment or click on  to Show Closed Comment of the Document.
-  indicates the Document is currently reserved. Click on  to Explore Document.
-  indicates the Document is reserve and in review. Click on  to Explore Document.
-  indicates the Document is in review. Click on  to Explore Document.

### Showing the Associations for a Generation

Show Associations displays the access, commenters, distribution, and notification that are associated to this Generation.

**Navigation:** [DocMgr > Explorer > Select Desired Generation > Side Menu > Show Assoc]

- The User must have the Groups privilege.
- The User must have Read access to the Generation.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Generation and fetch this Generation.
<b>(M)Modify</b>	A User can modify the attributes of this Generation. The User must also have the Modify Generation privilege.
<b>(D)Delete</b>	A User can delete this Generation. The User must also have the Delete Generation privilege.
<b>(RR)Reserve/Replace</b>	The User can reserve and replace the Document. The User must also have the Create Generation privilege.
<b>(O)Owner</b>	The User can act as the owner of this Generation. The User will be able to do anything to the Generation that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Documents are available to Users that have an account to the Document Manager.
<b>*Campus Users (R)</b>	Documents available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.
<b>*Community Users (R)</b>	Documents available to Users within the organization and selected partners IP addresses.
<b>*Global Users (R)</b>	Documents available to anyone on the World Wide Web.

Note:

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Generation. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Generation, the User will still get Read access to the Generation even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Generation even if the Users are on other Groups that are associated to this Generation; however, if an individual User is associated to this Generation that access will override the access given to them if they are also on a Group that is associated to this Generation.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Generation. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Generation, the User will still get Read access to the Generation even though None prevents them from getting any

other type of access. The Users will have no access to this Generation even if the User appears on a Group that gives them other access.

Note: The access to a Generation is determined by the access a User has to the Document that the Generation belongs to.

#### Access for a Generation

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Users have been associated, they will be listed below the Users on the Access for Generation screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.
- None indicates that no Groups or Users have been associated.

#### Commenters for a Generation

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

#### Distribution for a Generation

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Notification for a Generation

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.

- None indicates that no Groups or Users have been associated.

Showing the Associations for a Rendition

Show Associations displays the access, commenters, distribution, and notification that are associated to this Rendition.

**Navigation:** *[DocMgr > Explorer > Select Desired Rendition > Side Menu > Show Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Generation.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	The User can view the attributes of this Rendition and fetch this Rendition.
<b>(M)Modify</b>	The User can modify the attributes of this Rendition. The User must also have the Modify Generation privilege.
<b>(D)Delete</b>	The User can delete this Rendition. The User must also have the Delete Generation privilege.
<b>(RR)Replace Rendition/Resubmit Rendition</b>	The User can replace this Rendition. The User must also have the Releaser privilege with Read access to the Document or the User must have the Bypass privilege with Owner access to the Document. Only the Document Administrator can Resubmit a Generation for rendering.
<b>(O)Owner</b>	The User can act as the owner of this Rendition. The User will be able to do anything to the Rendition that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Documents are available to Users that have an account to the Document Manager.
<b>*Campus Users (R)</b>	Documents available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.
<b>*Community Users (R)</b>	Documents available to Users within the organization and selected partners IP addresses.
<b>*Global Users (R)</b>	Documents available to anyone on the World Wide Web.

Note:



Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Rendition. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Rendition, the User will still get Read access to the Rendition even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Rendition even if the Users are on other Groups that are associated to this Rendition. However, if an individual User is associated to the Rendition that access will override the access given to them if they are also on a Group that is associated to this Rendition.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Rendition. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Rendition, the User will still get Read access to the Rendition even though None prevents them from getting any other type of access. The Users will have no access to this Rendition even if the User appears on a Group that gives them other access.

Note: The access to a Rendition is determined by the access a User has to the Document that the Rendition belongs to.

#### Access for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Users have been associated, they will be listed below the Users on the Access for Document screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.
- None indicates that no Groups or Users have been associated.

#### Commenters for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

#### Distribution for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.

- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

Notification for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

Showing the Associations for an RMA Record Set

Show Associations displays the Access that is associated to this RMA Record Set.

**Navigation:** [*DocMgr > Records > Show... > Select Desired RMA Record Set > Side Menu > Show Assoc*]

- The User must have the Groups privilege.
- The User must have Read access to the RMA Record Set.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this RMA Record Set and see which records are in this RMA Record Set.
<b>(M)Modify</b>	A User can modify the attributes of this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>(D)Delete</b>	A User can delete this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>(CR)Create Record</b>	A User can create a record in this RMA Record Set. The User must also have the Records or Record Manager privilege.
<b>(O)Owner</b>	A User can act as the owner of this RMA Record Set. The User will be able to do anything to the RMA Record Set that the owner can, as long as the User's privileges allow it.

**Note:**

**Groups(N) - (N)None** denies all levels of access to Users on the Group from accessing this RMA Record Set. The Users on the Group will have no access to the RMA Record Set even if the Users are on other Groups that are associated to this RMA Record Set. However, if an individual User is associated to this RMA Record Set, that access will override the access given to them by being on a Group. If a User is the owner of the RMA Record Set, a Records Manager, or an Admin, they will still have Owner access to the RMA Record Set.

**Users(N) - (N)None** denies all levels of access to Users from accessing this RMA Record Set. An individual User's access overrides any access given to them by being on a Group. If a User is the owner of the RMA Record Set, a Records Manager, or an Admin, they will still have Owner access to the RMA Record Set.

**Access for an RMA Record Set**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

**Showing the Associations for a Form**

Show Associations displays the Access that is associated to this Form.

**Navigation:** *[DocMgr > Forms > Select Desired Form > Side Menu > Show Associations]*

- The User must have the Forms privilege.
- The User must have Read access to the Form.

<b>Access for Groups and Users</b>	<b>Definition of Access</b>
<b>(R)Read</b>	A User can view the attributes of this Form.
<b>(M)Modify</b>	A User can modify the attributes of this Form. The User must also have the Forms or Forms Manager privilege.
<b>(D)Delete</b>	A User can delete this Form or any of it's Form Submissions. The User must also have the Forms or Forms Manager privilege.
<b>(VS)View Submissions</b>	A User can view the Form Submissions of this Form. The User must also have the Forms or Forms Manager privilege. Note: Form

	Submissions can contain very sensitive data. It's important to understand what data is being collected and who should have access to that data before issuing View Submissions access.
<b>(FS)Form Submitter</b>	A User can create a submission of this Form.
<b>(OUx)Office Use 1-10</b>	Can be used internally inside the form to specify an arbitrary level of access the user must have to enter/modify data in one or more form fields. See the DocuBrain TechDoc Electronic Form specification for further details.
<b>(O)Owner</b>	A User can act as the owner of this Form. The User will be able to do anything to the Form that the owner can, as long as the User's privileges allow it.

**Note:**

Groups(N) - (N)None denies all levels of access to Users on the Group from accessing this Form. The Users on the Group will have no access to the Form even if the Users are on other Groups that are associated to this Form. However, if an individual User is associated to this Form, that access will override the access given to them by being on a Group. If a User is the owner of the Form, a Forms Manager, or an Admin, they will still have Owner access to the Form.

Users(N) - (N)None denies all levels of access to Users from accessing this Form. An individual User's access overrides any access given to them by being on a Group. If a User is the owner of the Form, a Forms Manager, or an Admin, they will still have Owner access to the Form.

**Access for Form**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.
- If Remote Users have been associated to a Form, they will be listed below the Users on the Access for Form screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.

**Showing the Associations for a Project**

Show Associations displays the Access that is associated to this Project.

**Navigation:** *[DocMgr > Records > Show... > Select Desired Project > Side Menu > Show Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Project.

Access for Groups and Users	Definition of Access
<b>Read</b>	A User can view the attributes of this Project.
<b>Modify</b>	A User can modify the attributes of this Project. The User must also have the Project privilege.
<b>Delete</b>	A User can delete this Project. The User must also have the Project privilege.
<b>Add Document</b>	A User can add Documents to this Project. The User must also have the Project privilege.
<b>Remove Document</b>	A User can remove Documents from this Project. The User must also have the Project privilege.
<b>Owner</b>	A User can act as the owner of this Project. The User will be able to do anything to the Project that the owner can, as long as the User's privileges allow it.

Note:

Groups(N) - (N)None denies all levels of access to Users on the Group from accessing this Project. The Users on the Group will have no access to the Project even if the Users are on other Groups that are associated to this Project. However, if an individual User is associated to this Project, that access will override the access given to them by being on a Group. If a User is the owner of the Project, a Records Manager, or an Admin, they will still have Owner access to the Project.

Users(N) - (N)None denies all levels of access to Users from accessing this Project. An individual User's access overrides any access given to them by being on a Group. If a User is the owner of the Project, a Records Manager, or an Admin, they will still have Owner access to the Project.

Access for a Project

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

## 4.2. Associating for Notification, Distribution, and Comments

Groups, Users, and Remote Emails can be associated to a specified object (Document, Folder, or Cabinet) for email events. TechDoc supports three different types of email associations.

Association	Definition
<b>Notification</b>	Whenever a Document, Folder, or Cabinet is modified by someone, a Notification email is sent to the associated Groups, Users, and Remote Emails. Events that generate Notifications include creating the object, modifying the object, deleting the object, reserving the object, replacing the object, releasing the object, etc.
<b>Distribution</b>	Whenever a Document is released by someone, a Distribution email is sent to the associated Groups, Users, and Remote Emails. This is useful for notifying people who are only interested in finding out when a new official release of a Document is available.
<b>Comments</b>	Commenters can be associated to a Document. These Commenters will be notified by email when a Request for Comments has been issued for this Document. A Request for Comments is often used as a simple, informal alternative to a Document Review.

### 4.2.1. Associating Commenters to a Document

Associate Commenters allows the User to associate Groups and Users to a specific Document. These commenters will be notified by email when a Request for Comments has been issued for this Document.

- The User must have the Groups privilege.
- The User must have Owner access to the Document.
- Users are notified when Requests for Comments has been issued for this Document.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Assoc Comm]*

The Associate Commenters for Document screen displays all Groups and individual Users currently associated to the Document.

- If a Group has been associated, click on the Group Name to display Group Info and Group Members.
- If a User has been associated, click on the User Name to display User Info.
- None indicates that no Groups or Users have been associated.

1. Enter the reason for associating commenters in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the Next button to continue.

### Associate Commenters Groups to a Document

One or more commenters Groups may be associated to the Document.

Note: If you do not need to associate Group(s) but need to associate individual Users, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name</b>	MG (My Groups)
<b>SG-Group Name</b>	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associate Commenters for Individual Users to a Document

One or more Users may be associated to the Document.

Note: If you do not need to associate individual Users, click the OK button to associate commenters.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate commenters.

Notes:

- A history record will be generated for associating commenters with the Document.
- Email will be sent to the notification associated with the Document.

#### 4.2.2. Associating Distribution to a Document

Associate Distribution allows the User to associate Groups, Users, and Remote Emails to a specific Document.

- The User must have the Groups privilege.
- The User must have Owner access to the Document.
- Users are notified when the Document has been released.
- If User is on both the distribution and notification Groups, they will receive only one email message when the Document is released.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Assoc Distr]*

The Associate Distribution to Document screen displays all Groups, individual Users, and Remote Emails currently associated to the Document.

- If a Group has been associated, click on the Group Name to display Group Info and Group Members.
- If a User has been associated, click on the User Name to display User Info.
- If Remote Emails have been associated, click on the Remote Emails to send email. Remote Email is the email address for a person that does not have a Tech Doc account.
- None indicates that no Groups, Users or Remote Emails have been associated.



1. Enter the reason for associating distribution list in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the Next button to continue.

### Associate Distribution Groups to a Document

One or more distribution Groups may be associated to the Document.

Note: If you do not need to associate Group(s) but need to associate individual Users, or Remote Emails, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name</b>	MG (My Groups)
<b>SG-Group Name</b>	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associate Distribution for Individual Users to a Document

One or more Users may be associated to the Document.

Note: If you do not need to associate individual Users but need to associate Remote Emails, click the Next button to continue.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associate Distribution for Remote Emails to a Document

A Remote Email is the email address for a person that is notified when the Document has been released but who does not have a Tech Doc account.

1. Enter the SMTP email address in the New Remote Email box. For example, John.Doe@example.com.
2. Click the Add button.

Note: Repeat the above step to add another Remote Email. To remove a Remote Email click the Remove button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate distribution list to the Document.

#### Notes:

- A history record will be generated for associating distribution with the Document.
- Email will be sent to the notification associated with the Document.

### **4.2.3. Associating Notification to a Document**

Associate Notification allows the User to associate Groups, Users, and Remote Emails to a specific Document.

- The User must have the Groups privilege.

- The User must have Owner access to the Document.
- Users are notified when a Document has been reserved/replaced; attributes of Document have been modified; Document has been released, and when Document has been deleted.
- If User is on both the distribution and notification lists, they will receive only one email message when the Document is released.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Assoc Notif]*

The Associate Notification to Document screen displays all Groups, individual Users, and Remote Emails currently associated to the Document.

- If a Group has been associated, click on the Group Name to display Group Info and Group Members.
  - If a User has been associated, click on the User Name to display User Info.
  - If Remote Emails have been associated, click on the Remote Emails to send email. Remote email is the email address for a person that does not have a Tech Doc account.
  - None indicates that no Groups, Users or Remote Emails have been associated.
1. Enter the reason for associating notification list in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
  2. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Associate Notification Groups to a Document

One or more notification Groups may be associated to the Document.

Note: If you do not need to associate Group(s) but need to associate individual Users, or Remote Emails, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.

2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name</b>	MG (My Groups)
<b>SG-Group Name</b>	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associate Notification for Individual Users to a Document

One or more Users may be associated to the Document.

Note: If you do not need to associate individual Users but need to associate Remote Emails, click the Next button to continue.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associate Notification for Remote Emails to a Document

A Remote Email is the email address for a person that needs to be notified of a specific action to the Document but who does not have a Tech Doc account.

1. Enter the SMTP email address in the New Remote Email box. For example, John.Doe@example.com.
2. Click the Add button.

Note: Repeat the above step to add another Remote Email. To remove a Remote Email click the Remove button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate notification list to the Document.

Notes:

- A history record will be generated for associating notification with the Document.
- Email will be sent to the notification associated with the Document.

#### 4.2.4. Associating Notification to a Folder

Associate Notification allows the User to associate Groups, Users, and Remote Emails to a specific Folder.

- The User must have the Groups privilege.
- The User must have Owner access to the Folder.
- Users are notified when a new Folder has been created; attributes of Folder have been modified, and when a Folder has been deleted.

**Navigation:** *[DocMgr > Explorer > Select Desired Folder > Side Menu > Assoc Notif]*

The Associate Notification to Folder screen displays all Groups, individual Users, and Remote Emails currently associated to the Folder.

- If a Group has been associated, click on the Group Name to display Group Info and Group Members.
  - If a User has been associated, click on the User Name to display User Info.
  - If Remote Emails have been associated, click on the Remote Emails to send email. Remote email is the email address for a person that does not have a Tech Doc account.
  - None indicates that no Groups, Users or Remote Emails have been associated.
1. Enter the reason for associating notification list in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
  2. Click the Cancel button to cancel the command, or click the Next button to continue.

Associate Notification Groups to a Folder

One or more notification Groups may be associated to the Folder.

Note: If you do not need to associate Group(s) but need to associate individual Users, or Remote Emails, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name</b>	MG (My Groups)
<b>SG-Group Name</b>	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

Associate Notification for Individual Users to a Folder

One or more Users may be associated to the Folder.

Note: If you do not need to associate individual Users but need to associate Remote Emails, click the Next button to continue.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associate Notification for Remote Emails to a Folder

A Remote Email is the email address for a person that needs to be notified of a specific action to the Folder but who does not have a Tech Doc account.

1. Enter the SMTP email address in the New Remote Email box. For example, John.Doe@example.com.
2. Click the Add button.

Note: Repeat the above step to add another Remote Email. To remove a Remote Email click the Remove button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate notification list to the Folder.

#### Notes:

- A history record will be generated for associating notification with the Folder.
- Email will be sent to the notification associated with the Folder.

### 4.2.5. Associating Notification to a Cabinet

Associate Notification allows the User to associate Groups, Users, and Remote Emails to a specific Cabinet.

- The User must have the Groups privilege.
- The User must have Owner access to the Cabinet.
- Users on the notification Group are notified when a new Folder has been created; attributes of Cabinet have been modified, and when Folder has been deleted.

**Navigation:** *[DocMgr > Explorer > Select Desired Cabinet > Side Menu > Assoc Notif]*

The Associate Notification to Cabinet screen displays all Groups, individual Users, and Remote Emails currently associated to the Cabinet.

- If a Group has been associated, click on the Group Name to display Group Info and Group Members.
  - If a User has been associated, click on the User Name to display User Info.
  - If Remote Emails has been associated, click on the Remote Emails to send email. Remote email is the email address for a person that does not have a Tech Doc account.
  - None indicates that no Groups, Users or Remote Emails have been associated.
1. Enter the reason for associating notification list in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
  2. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Associate Notification Groups to a Cabinet

One or more notification Groups may be associated to the Cabinet.

Note: If you do not need to associate Group(s) but need to associate individual Users, or Remote Emails, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:



Selected Groups	Definition of Codes
<b>MG-Group Name</b>	MG (My Groups)
<b>SG-Group Name</b>	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associate Notification for Individual Users to a Cabinet

One or more Users may be associated to the Cabinet.

Note: If you do not need to associate individual Users but need to associate Remote Emails, click the Next button to continue.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Associate Notification for Remote Emails to a Cabinet

A Remote Email is the email address for a person that needs to be notified of a specific action to the Cabinet but who does not have a Tech Doc account.

1. Enter the SMTP email address in the New Remote Email box. For example, John.Doe@example.com.
2. Click the Add button.

Note: Repeat the above step to add another Remote Email. To remove a Remote Email click the Remove button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate notification list to the Cabinet.

Notes:

- A history record will be generated for associating notification with the Cabinet.
- Email will be sent to the notification associated with the Cabinet.

#### 4.2.6. Associating Document Default Commenters

Commenters are assigned to a Cabinet or Folder to determine which Users are associated to the Documents in this Cabinet or Folder. These commenters will be notified by email when a Request for Comments has been issued for these Documents. Document Default Commenters allows you to set the default commenters on a Cabinet or Folder. All commenter associations made here will be automatically set on child Documents created within this Cabinet or Folder. Folders created within this Cabinet or Folder will receive the Document Default Commenters of this Cabinet or Folder.

The Folder Inheritance field is used to specify if the commenters associated should also be applied to the child folders. Using the drop down, select one of the following options:

- Replace child folders associations with these - Says to replace all child folders' associations with the associations on this cabinet or folder.
- Merge these associations with child folders associations - Says to merge the associations of this cabinet or folder with the child folders' associations.

The Document Inheritance field is used to specify if the commenters associated should also be applied to the child documents. Using the drop down, select one of the following options:

- Replace child documents associations with these - Says to replace all child documents' associations with the associations on this cabinet or folder.
- Merge these associations with child documents associations - Says to merge the associations of this cabinet or folder with the child documents' associations.

**Navigation:** [*DocMgr > Explorer > Navigate to Cabinet or Folder > Side Menu > Doc Default Comm*]

The Document Default Commenters screen displays all Groups and individual Users currently associated to the Cabinet or Folder.

- The User must have Owner access to the Cabinet or Folder.
- Users are notified when Requests for Comments has been issued for the Documents.
- If a Group has been associated, click on the Group Name to display Group Info and Group Members.
- If a User has been associated, click on the User Name to display User Info.
- None indicates that no Groups or Users have been associated.

1. Enter the type of Folder Inheritance to use on child folders by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
2. Enter the type of Document Inheritance to use on child documents by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
3. Enter the reason for associating commenters in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the Next button to continue.

### Associating Groups for Documents

One or more commenters Groups may be associated on a Cabinet or Folder for the Documents contained within that Cabinet or Folder.

Note: If you do not need to associate Group(s) but need to associate individual Users, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name</b>	MG (My Groups)
<b>SG-Group Name</b>	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Users for Documents

One or more Users may be associated on a Cabinet or Folder for the Documents contained within that Cabinet or Folder.

Note: If you do not need to associate individual Users, click the OK button to associate commenters.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate commenters.

#### Notes:

- The document default commenters on the Cabinet or Folder will be updated.
- The document default commenters on the child Folders within this Cabinet or Folder will be updated if selected to using the Folder Inheritance drop down.
- The commenters on the child Documents within this Cabinet or Folder will be updated if selected to using the Document Inheritance drop down.

### 4.2.7. Associating Document Default Distribution

Document Default Distribution allows you to associate Groups, Users, and Remote Emails on a specific Cabinet or Folder for the Documents contained within that Cabinet or Folder. All distribution associations made here will be automatically set on child Documents created within this Cabinet or Folder. Folders created within this Cabinet or Folder will receive the Document Default Distribution of this Cabinet or Folder.

The Folder Inheritance field is used to specify if the distribution associated should also be applied to the child folders. Using the drop down, select one of the following options:

- Replace child folders associations with these - Says to replace all child folders' associations with the associations on this cabinet or folder.
- Merge these associations with child folders associations - Says to merge the associations of this cabinet or folder with the child folders' associations.

The Document Inheritance field is used to specify if the distribution associated should also be applied to the child documents. Using the drop down, select one of the following options:

- Replace child documents associations with these - Says to replace all child documents' associations with the associations on this cabinet or folder.
- Merge these associations with child documents associations - Says to merge the associations of this cabinet or folder with the child documents' associations.

**Navigation:** [*DocMgr > Explorer > Navigate to Cabinet or Folder > Side Menu > Doc Default Distr*]

The Associate Distribution to Document screen displays all Groups, individual Users, and Remote Emails currently associated to the Cabinet or Folder.

- The User must have Owner access to the Cabinet or Folder.
  - Users are notified when the Documents have been released.
  - If User is on both the distribution and notification Groups, they will receive only one email message when the Documents are released.
  - If a Group has been associated, click on the Group Name to display Group Info and Group Members.
  - If a User has been associated, click on the User Name to display User Info.
  - If Remote Emails have been associated, click on the Remote Emails to send email. Remote Email is the email address for a person that does not have a Tech Doc account.
  - None indicates that no Groups, Users or Remote Emails have been associated.
1. Enter the type of Folder Inheritance to use on child folders by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
  2. Enter the type of Document Inheritance to use on child documents by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
  3. Enter the reason for associating distribution list in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
  4. Click the Cancel button to cancel the command, or click the Next button to continue.

### Associating Groups for Documents

One or more distribution Groups may be associated on a Cabinet or Folder for the Documents contained within that Cabinet or Folder.

Note: If you do not need to associate Group(s) but need to associate individual Users, or Remote Emails, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
MG-Group Name	MG (My Groups)
SG-Group Name	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Users for Documents

One or more Users may be associated on a Cabinet or Folder for the Documents contained within that Cabinet or Folder.

Note: If you do not need to associate individual Users but need to associate Remote Emails, click the Next button to continue.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Remote Emails for Documents

A Remote Email is the email address for a person that is notified when a Document has been released but who does not have a Tech Doc account.

1. Enter the SMTP email address in the New Remote Email box. For example, John.Doe@example.com.
2. Click the Add button.

Note: Repeat the above step to add another Remote Email. To remove a Remote Email click the Remove button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate distribution.

#### Notes:

- The document default distribution on the Cabinet or Folder will be updated.
- The document default distribution on the child Folders within this Cabinet or Folder will be updated if selected to using the Folder Inheritance drop down.
- The distribution on the child Documents within this Cabinet or Folder will be updated if selected to using the Document Inheritance drop down.

### **4.2.8. Associating Document Default Notification**

Document Default Notification allows you to associate Groups, Users, and Remote Emails on a specific Cabinet or Folder for the Documents contained within that Cabinet or Folder. All notification associations made here will be automatically set on child Documents created within this Cabinet or Folder. Folders created within this Cabinet or Folder will receive the Document Default Notification of this Cabinet or Folder.

The Folder Inheritance field is used to specify if the notification associated should also be applied to the child folders. Using the drop down, select one of the following options:

- Replace child folders associations with these - Says to replace all child folders' associations with the associations on this cabinet or folder.
- Merge these associations with child folders associations - Says to merge the associations of this cabinet or folder with the child folders' associations.

The Document Inheritance field is used to specify if the notification associated should also be applied to the child documents. Using the drop down, select one of the following options:

- Replace child documents associations with these - Says to replace all child documents' associations with the associations on this cabinet or folder.
- Merge these associations with child documents associations - Says to merge the associations of this cabinet or folder with the child documents' associations.

**Navigation:** [*DocMgr > Explorer > Navigate to Cabinet or Folder > Side Menu > Doc Default Notif*]

Document Default Notification screen displays all Groups, individual Users, and Remote Emails currently associated to the Cabinet or Folder.

- The User must have Owner access to the Cabinet or Folder.
  - Users are notified when the Documents have been reserved/replaced; attributes of the Documents have been modified; Documents have been released, and when the Documents has been deleted.
  - If User is on both the distribution and notification lists, they will receive only one email message when the Documents are released.
  - If a Group has been associated, click on the Group Name to display Group Info and Group Members.
  - If a User has been associated, click on the User Name to display User Info.
  - If Remote Emails have been associated, click on the Remote Emails to send email. Remote email is the email address for a person that does not have a Tech Doc account.
  - None indicates that no Groups, Users or Remote Emails have been associated.
1. Enter the type of Folder Inheritance to use on child folders by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
  2. Enter the type of Document Inheritance to use on child documents by clicking on the down arrow and selecting it from the list. See the discussion on inheritance [above](#) for more details.
  3. Enter the reason for associating notification list in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
  4. Click the Cancel button to cancel the command, or click the Next button to continue.

Associating Groups for Documents



One or more notification Groups may be associated on a Cabinet or Folder for the Documents contained within that Cabinet or Folder.

Note: If you do not need to associate Group(s) but need to associate individual Users, or Remote Emails, click the Next button to continue.

My Groups are Groups that are created by you (both private and shared). Private Groups are for your use only. Shared Groups are available for anyone to use.

Also under Shared Groups are two types of System Groups. Users on these Groups have a Tech Doc account.

System Employer Groups - Contains all the Users that belong to that specific Employer. System Employer Group names begin with {Emp}.

System Organization Groups - Contains all the Users that belong to that specific Organization. System Organization Group names begin with {Org}.

1. Select the Groups in the My Groups or Shared Groups box (on the left) to be associated by clicking on the Group name. This will highlight the Group name.
2. Click the Add> button. The Add> button moves the highlighted Group to the Selected Groups box. To remove a Group from the Selected Groups box, highlight the Group and click the <Remove button. The <Remove All button removes all the Groups from the Selected Groups box. To display the Users on the Group, highlight the Group, and click the Show Group button.

Note: The Groups name will be displayed in the Selected Groups box as follows:

Selected Groups	Definition of Codes
<b>MG-Group Name</b>	MG (My Groups)
<b>SG-Group Name</b>	SG (Shared Groups)

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Users for Documents

One or more Users may be associated on a Cabinet or Folder for the Documents contained within that Cabinet or Folder.

Note: If you do not need to associate individual Users but need to associate Remote Emails, click the Next button to continue.

Note: Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users list. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the Users in the Available Users box (on the left) to be associated by clicking on the User's name. This will highlight the User name.
2. Click the Add> button. The Add> button moves the highlighted User to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Associating Remote Emails for Documents

A Remote Email is the email address for a person that needs to be notified of a specific action to the Document but who does not have a Tech Doc account.

1. Enter the SMTP email address in the New Remote Email box. For example, John.Doe@example.com.
2. Click the Add button.

Note: Repeat the above step to add another Remote Email. To remove a Remote Email click the Remove button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to associate notification list to the Document.

#### Notes:

- The document default notification on the Cabinet or Folder will be updated.
- The document default notification on the child Folders within this Cabinet or Folder will be updated if selected to using the Folder Inheritance drop down.
- The notification on the child Documents within this Cabinet or Folder will be updated if selected to using the Document Inheritance drop down.

### 4.2.9. Showing Associations

Show Associations displays the access, commenters, distribution, and notification associated to Documents, Folders, Cabinets, etc where applicable.

#### *Showing the Associations for a Document*

Show Associations displays the access, commenters, distribution, and notification that are associated to this Document.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Show Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Document.

Note:

Show Associations displays the associations at the Document level. For example, if the Document is set to allow Read access by community Users. \*Community Users (R) would be displayed at the Document level. However, when you restrict a Generation it does not allow Read access by community Users. To show associations for a specific Generation, from the Document Menu click on Explore, click on the Generation you want to show associations for, and click on Show Assoc. Now \*Community Users (R) will not be displayed because this is a restricted Generation.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Document, view the attributes of this Document's Generations and Renditions and fetch this Document's Generations and Renditions.
<b>(M)Modify</b>	A User can modify the attributes of this Document and this Document's Generations and Renditions. The User must also have the Modify Document privilege.
<b>(D)Delete</b>	A User can delete this Document. The User must also have the Delete Document privilege.
<b>(RR)Reserve/Replace</b>	A User can reserve and replace the Document. The User must also have the Create Generation privilege.
<b>Owner</b>	A User can act as the owner of this Document. The User will be able to do anything to the Document that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Documents are available to Users that have an account on the Document Manager.
<b>*Campus Users (R)</b>	Documents are available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.

<b>*Community Users (R)</b>	Documents are available to Users within the organization and selected partners IP addresses.
<b>*Global Users (R)</b>	Documents are available to anyone on the World Wide Web.

**Note:**

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Document. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Document, the User will still get Read access to the Document even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Document even if the Users are on other Groups that are associated to this Document. However, if an individual User is associated to the Document that access will override the access given to them if they are also on a Group that is associated to this Document.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Document. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Document, the User will still get Read access to the Document even though None prevents them from getting any other type of access. The Users will have no access to this Document even if the User appears on a Group that gives them other access.

**Access for a Document**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Users have been associated to a Document, they will be listed below the Users on the Access for Document screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.
- None indicates that no Groups or Users have been associated.

**Commenters for a Document**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

**Distribution for a Document**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Notification for a Document

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Showing the Associations for a Folder

Show Associations displays the Access and Notification that are associated to this Folder as well as the Document Default Access, Commenters, Notification, and Distribution. Documents created in this Folder will be given the Access, Commenters, Notification, and Distribution set by the Document Defaults on this Folder. Folders created in this Folder will be given the Document Defaults on this Folder.

**Navigation:** *[DocMgr > Explorer > Select Desired Folder > Side Menu > Show Associations]*

- The User must have the Groups privilege.
- The User must have Read access to the Folder.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Folder and see which subfolders and Documents are in this Folder.
<b>(M)Modify</b>	A User can modify the attributes of this Folder. The User must also have the Modify Folder privilege.
<b>(D)Delete</b>	A User can delete this Folder. The User must also have the Delete Folder privilege.
<b>(CF)Create Folder</b>	A User can create a child Folder in this Folder. The User must also have the Create Folder privilege.

<b>(CD)Create Document</b>	A User can create a Document in this Folder. The User must also have the Create Document privilege.
<b>(O)Owner</b>	A User can act as the owner of this Folder. The User will be able to do anything to the Folder that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Folder is available to Users that have an account to the Document Manager.

**Note:**

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Folder. Because a logged in User is always considered part of the Local group, if \*Local Users (R) is associated to the Folder, the User will still get Read access to the Folder even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Folder even if the Users are on other Groups that are associated to this Folder. However, if an individual User is associated to the Folder that access will override the access given to them if they are also on a Group that is associated to this Folder.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Folder. Because a logged in User is always considered part of the local group, if \*Local Users (R) is associated to the Folder, the User will still get Read access to the Folder even though None prevents them from getting any other type of access. The Users will have no access to this Folder even if the User appears on a Group that gives them other access.

**Access for a Folder**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

**Notification for a Folder**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that remote User.
- None indicates that no Groups or Users have been associated.

## Document Default Access for a Folder

- Documents created in this Folder will automatically have their access set to the Document Default Access on this Folder.
- Folders created in this Folder will automatically have their Document Default Access set to the Document Default Access on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of the Documents.
<b>(M)Modify</b>	A User can modify the attributes of Documents. The User must also have the Modify Document privilege.
<b>(D)Delete</b>	A User can delete the Documents. The User must also have the Delete Document privilege.
<b>(RR)Reserve/Replace</b>	A User can reserve and replace the Documents.
<b>(O)Owner</b>	A User can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.

## Document Default Commenters for a Folder

- Documents created in this Folder will automatically have their commenters set to the Document Default Commenters on this Folder.
- Folders created in this Folder will automatically have their Document Default Commenters set to the Document Default Commenters on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

### Document Default Distribution for a Folder

- Documents created in this Folder will automatically have their distribution set to the Document Default Distribution on this Folder.
- Folders created in this Folder will automatically have their Document Default Distribution set to the Document Default Distribution on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

### Document Default Notification for a Folder

- Documents created in this Folder will automatically have their notification set to the Document Default Notification on this Folder.
- Folders created in this Folder will automatically have their Document Default Notification set to the Document Default Notification on this Folder.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

### Showing the Associations for a Cabinet

Show Associations displays the Access and Notification that are associated to this Cabinet as well as the Document Default Access, Commenters, Notification, and Distribution. Documents created in this Cabinet will be given the Access, Commenters, Notification, and Distribution set by the Document Defaults on this Cabinet. Folders created in this Cabinet will be given the Document Defaults on this Cabinet.

**Navigation:** *[DocMgr > Explorer > Select Desired Cabinet > Side Menu > Show Associations]*

- The User must have the Groups privilege.
- The User must have Read access to the Cabinet.



Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Cabinet and see which Folders and Documents are in this Cabinet.
<b>(M)Modify</b>	A User can modify the attributes of this Cabinet. The User must also have the Modify Cabinet privilege.
<b>(D)Delete</b>	A User can delete this Cabinet. The User must also have the Delete Cabinet privilege.
<b>(CF)Create Folder</b>	A User can create a Folder in this Cabinet. The User must also have the Create Folder privilege.
<b>(CD)Create Document</b>	A User can create a Document in this Cabinet. The User must also have the Create Document privilege.
<b>(O)Owner</b>	A User can act as the owner of this Cabinet. The User will be able to do anything to the Cabinet that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Cabinet is available to Users that have an account to the Document Manager.

Note:

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Cabinet. Because a logged in User is always considered part of the Local group, if \*Local Users (R) is associated to the Cabinet, the User will still get Read access to the Cabinet even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Cabinet even if the Users are on other Groups that are associated to this Cabinet. However, if an individual User is associated to the Cabinet that access will override the access given to them if they are also on a Group that is associated to this Cabinet.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Cabinet. Because a logged in User is always considered part of the local group, if \*Local Users (R) is associated to the Cabinet, the User will still get Read access to the Cabinet even though None prevents them from getting any other type of access. The Users will have no access to this Cabinet even if the User appears on a Group that gives them other access.

Access for a Cabinet

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

#### Notification for a Cabinet

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Document Default Access for a Cabinet

- Documents created in this Cabinet will automatically have their access set to the Document Default Access on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Access set to the Document Default Access on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of the Documents.
<b>(M)Modify</b>	A User can modify the attributes of Documents. The User must also have the Modify Document privilege.
<b>(D)Delete</b>	A User can delete the Documents. The User must also have the Delete Document privilege.
<b>(RR)Reserve/Replace</b>	A User can reserve and replace the Documents.

<b>(O)Owner</b>	A User can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.
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#### Document Default Commenters for a Cabinet

- Documents created in this Cabinet will automatically have their commenters set to the Document Default Commenters on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Commenters set to the Document Default Commenters on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

#### Document Default Distribution for a Cabinet

- Documents created in this Cabinet will automatically have their distribution set to the Document Default Distribution on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Distribution set to the Document Default Distribution on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

#### Document Default Notification for a Cabinet

- Documents created in this Cabinet will automatically have their notification set to the Document Default Notification on this Cabinet.
- Folders created in this Cabinet will automatically have their Document Default Notification set to the Document Default Notification on this Cabinet.
- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.

- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups, Users, or Remote Emails have been associated.

### Showing the Associations for Access to a Group

Show Associations displays all of the Users associated with Owner access to this Group.

**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Group.

The Users associated with Owner access to this Group are displayed.

### Showing Documents and Folders Associated To a Group for Access

Shows Associations shows all of the Documents and Folders that are associated to this Group for access.

**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > For Access]*

- The User must have the Groups privilege.
- The User must have Read access to the Group.

All of the Documents that use this Group for access are displayed. If the Group is a User Group, all of the Folders that use this Group for access are displayed.

### Showing Documents Associated to a Group for Commenters


Show Commenters displays all of the Documents that use this Group for commenting.



**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > For Comm]*

- The User must have the Groups privilege.
- The User must have Read access to the Group.











### Documents Associated to a Group for Commenters

Note: If no Documents are associated to this Group, the following message will be displayed: "No Documents found."

- The Number and Title are displayed for each Document.
- Click on  to Explore Document.

- Click on  to Show Info of the Document.
- Click on  to Fetch Latest Generation of the Document.

Note: The following icons will be displayed if the Document: has Comments, currently reserved, or is in review.

-  indicates the Document has open Comments.  indicates the Document has closed Comments. Click on  to Show Open Comment or click on  to Show Closed Comment of the Document.
-  indicates the Document is currently reserved. Click on  to Explore Document.
-  indicates the Document is reserve and in review. Click on  to Explore Document.
-  indicates the Document is in review. Click on  to Explore Document.

### Showing the Associations for a Distribution




Show Associations displays all of the Documents associated to this distribution list.

**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > For Distr]






- The User must have the Groups privilege.
- The User must have Read access to the Group.





### Documents Associated to a Group for Distribution

Note: If no Documents are associated to this Group, the following message will be displayed: "No Documents found."

- The Number and Title are displayed for each Document.
- Click on  to Explore Document.
- Click on  to Show Info of the Document.
- Click on  to Fetch Latest Generation of the Document.

Note: The following icons will be displayed if the Document: has Comments, currently reserved, or is in review.

-  indicates the Document has open Comments.  indicates the Document has closed Comments. Click on  to Show Open Comment or click on  to Show Closed Comment of the Document.
-  indicates the Document is currently reserved. Click on  to Explore Document.

-  indicates the Document is reserve and in review. Click on  to Explore Document.
-  indicates the Document is in review. Click on  to Explore Document.

### Showing the Associations for a Notification Group



Show Associations displays all of the Folders and Documents associated to this notification list.

**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > For Notif]

- The User must have the Groups privilege.
- The User must have Read access to the Group.

### Folders Associated to a Group for Notification

Note: If no Folders are associated to this Group, the following message will be displayed: "No Folders found."




- The Name and Description are displayed for each Folder.
- Click on  to Explore Folder.
- Click on  to Show Info of the Folder.

Note: If the notification list is associated to a Cabinet, the following item will be displayed.











- Click on  to Show Info of the Cabinet.

### Documents Associated to a Group for Notification

Note: If no Documents are associated to this Group, the following message will be displayed: "No Documents found."

- The Number and Title are displayed for each Document.
- Click on  to Explore Document.
- Click on  to Show Info of the Document.
- Click on  to Fetch Latest Generation of the Document.

Note: The following icons will be displayed if the Document: has Comments, currently reserved, or is in review.

-  indicates the Document has open Comments.  indicates the Document has closed Comments. Click on  to Show Open Comment or click on  to Show Closed Comment of the Document.
-  indicates the Document is currently reserved. Click on  to Explore Document.
-  indicates the Document is reserve and in review. Click on  to Explore Document.
-  indicates the Document is in review. Click on  to Explore Document.

Showing the Associations for a Generation

Show Associations displays the access, commenters, distribution, and notification that are associated to this Generation.

**Navigation:** *[DocMgr > Explorer > Select Desired Generation > Side Menu > Show Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Generation.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Generation and fetch this Generation.
<b>(M)Modify</b>	A User can modify the attributes of this Generation. The User must also have the Modify Generation privilege.
<b>(D)Delete</b>	A User can delete this Generation. The User must also have the Delete Generation privilege.
<b>(RR)Reserve/Replace</b>	The User can reserve and replace the Document. The User must also have the Create Generation privilege.
<b>(O)Owner</b>	The User can act as the owner of this Generation. The User will be able to do anything to the Generation that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Documents are available to Users that have an account to the Document Manager.
<b>*Campus Users (R)</b>	Documents available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.

<b>*Community Users (R)</b>	Documents available to Users within the organization and selected partners IP addresses.
<b>*Global Users (R)</b>	Documents available to anyone on the World Wide Web.

**Note:**

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Generation. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Generation, the User will still get Read access to the Generation even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Generation even if the Users are on other Groups that are associated to this Generation; however, if an individual User is associated to this Generation that access will override the access given to them if they are also on a Group that is associated to this Generation.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Generation. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Generation, the User will still get Read access to the Generation even though None prevents them from getting any other type of access. The Users will have no access to this Generation even if the User appears on a Group that gives them other access.

Note: The access to a Generation is determined by the access a User has to the Document that the Generation belongs to.

**Access for a Generation**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Users have been associated, they will be listed below the Users on the Access for Generation screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.
- None indicates that no Groups or Users have been associated.

**Commenters for a Generation**

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.



- None indicates that no Groups or Users have been associated.

#### Distribution for a Generation

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Notification for a Generation

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Showing the Associations for a Rendition

Show Associations displays the access, commenters, distribution, and notification that are associated to this Rendition.

**Navigation:** *[DocMgr > Explorer > Select Desired Rendition > Side Menu > Show Assoc]*

- The User must have the Groups privilege.
- The User must have Read access to the Generation.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	The User can view the attributes of this Rendition and fetch this Rendition.
<b>(M)Modify</b>	The User can modify the attributes of this Rendition. The User must also have the Modify Generation privilege.
<b>(D)Delete</b>	The User can delete this Rendition. The User must also have the Delete Generation privilege.

<b>(RR)Replace Rendition/Resubmit Rendition</b>	The User can replace this Rendition. The User must also have the Releaser privilege with Read access to the Document or the User must have the Bypass privilege with Owner access to the Document. Only the Document Administrator can Resubmit a Generation for rendering.
<b>(O)Owner</b>	The User can act as the owner of this Rendition. The User will be able to do anything to the Rendition that the owner can, as long as the User's privileges allow it.
<b>*Local Users (R)</b>	Documents are available to Users that have an account to the Document Manager.
<b>*Campus Users (R)</b>	Documents available to Users as defined by a set of trusted IP address ranges that are considered part of the Campus for the specific Document Manager.
<b>*Community Users (R)</b>	Documents available to Users within the organization and selected partners IP addresses.
<b>*Global Users (R)</b>	Documents available to anyone on the World Wide Web.

Note:

Groups(N) - (N)None denies all levels of access, except for Read, to Users on the Group from accessing this Rendition. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Rendition, the User will still get Read access to the Rendition even though None prevents them from getting any other type of access. The Users on this Group will have no access to the Rendition even if the Users are on other Groups that are associated to this Rendition. However, if an individual User is associated to the Rendition that access will override the access given to them if they are also on a Group that is associated to this Rendition.

User(N) - (N)None denies all levels of access, except for Read, to Users from accessing this Rendition. Because a logged in User is always considered part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Rendition, the User will still get Read access to the Rendition even though None prevents them from getting any other type of access. The Users will have no access to this Rendition even if the User appears on a Group that gives them other access.

Note: The access to a Rendition is determined by the access a User has to the Document that the Rendition belongs to.

Access for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Users have been associated, they will be listed below the Users on the Access for Document screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.
- None indicates that no Groups or Users have been associated.

#### Commenters for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

#### Distribution for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Notification for a Rendition

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- If Remote Email has been associated, click on the Remote Email Address to send email to that Remote User.
- None indicates that no Groups or Users have been associated.

#### Showing the Associations for an RMA Record Set

Show Associations displays the Access that is associated to this RMA Record Set.

**Navigation:** [*DocMgr > Records > Show... > Select Desired RMA Record Set > Side Menu > Show Assoc*]

- The User must have the Groups privilege.
- The User must have Read access to the RMA Record Set.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this RMA Record Set and see which records are in this RMA Record Set.
<b>(M)Modify</b>	A User can modify the attributes of this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>(D)Delete</b>	A User can delete this RMA Record Set. The User must also have the Record Sets or Record Manager privilege.
<b>(CR)Create Record</b>	A User can create a record in this RMA Record Set. The User must also have the Records or Record Manager privilege.
<b>(O)Owner</b>	A User can act as the owner of this RMA Record Set. The User will be able to do anything to the RMA Record Set that the owner can, as long as the User's privileges allow it.

Note:

Groups(N) - (N)None denies all levels of access to Users on the Group from accessing this RMA Record Set. The Users on the Group will have no access to the RMA Record Set even if the Users are on other Groups that are associated to this RMA Record Set. However, if an individual User is associated to this RMA Record Set, that access will override the access given to them by being on a Group. If a User is the owner of the RMA Record Set, a Records Manager, or an Admin, they will still have Owner access to the RMA Record Set.

Users(N) - (N)None denies all levels of access to Users from accessing this RMA Record Set. An individual User's access overrides any access given to them by being on a Group. If a User is the owner of the RMA Record Set, a Records Manager, or an Admin, they will still have Owner access to the RMA Record Set.

Access for an RMA Record Set

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

## Showing the Associations for a Form

Show Associations displays the Access that is associated to this Form.

**Navigation:** *[DocMgr > Forms > Select Desired Form > Side Menu > Show Associations]*

- The User must have the Forms privilege.
- The User must have Read access to the Form.

Access for Groups and Users	Definition of Access
<b>(R)Read</b>	A User can view the attributes of this Form.
<b>(M)Modify</b>	A User can modify the attributes of this Form. The User must also have the Forms or Forms Manager privilege.
<b>(D)Delete</b>	A User can delete this Form or any of it's Form Submissions. The User must also have the Forms or Forms Manager privilege.
<b>(VS)View Submissions</b>	A User can view the Form Submissions of this Form. The User must also have the Forms or Forms Manager privilege. Note: Form Submissions can contain very sensitive data. It's important to understand what data is being collected and who should have access to that data before issuing View Submissions access.
<b>(FS)Form Submitter</b>	A User can create a submission of this Form.
<b>(OUx)Office Use 1-10</b>	Can be used internally inside the form to specify an arbitrary level of access the user must have to enter/modify data in one or more form fields. See the DocuBrain TechDoc Electronic Form specification for further details.
<b>(O)Owner</b>	A User can act as the owner of this Form. The User will be able to do anything to the Form that the owner can, as long as the User's privileges allow it.

Note:

Groups(N) - (N)None denies all levels of access to Users on the Group from accessing this Form. The Users on the Group will have no access to the Form even if the Users are on other Groups that are associated to this Form. However, if an individual User is associated to this Form, that access will override the access given to them by being on a Group. If a User is the owner of the Form, a Forms Manager, or an Admin, they will still have Owner access to the Form.

Users(N) - (N)None denies all levels of access to Users from accessing this Form. An individual User's access overrides any access given to them by being on a Group. If a User is the owner of the Form, a Forms Manager, or an Admin, they will still have Owner access to the Form.

#### Access for Form

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.
- If Remote Users have been associated to a Form, they will be listed below the Users on the Access for Form screen. The Remote Users are displayed as the authenticator a forward slash and then the remote username. For example, kerberos/jdoe, where kerberos is the authenticator name and jdoe is the username.

#### Showing the Associations for a Project

Show Associations displays the Access that is associated to this Project.

**Navigation:** [[DocMgr](#) > [Records](#) > [Show...](#) > [Select Desired Project](#) > [Side Menu](#) > [Show Assoc](#)]

- The User must have the Groups privilege.
- The User must have Read access to the Project.

Access for Groups and Users	Definition of Access
<b>Read</b>	A User can view the attributes of this Project.
<b>Modify</b>	A User can modify the attributes of this Project. The User must also have the Project privilege.
<b>Delete</b>	A User can delete this Project. The User must also have the Project privilege.
<b>Add Document</b>	A User can add Documents to this Project. The User must also have the Project privilege.
<b>Remove Document</b>	A User can remove Documents from this Project. The User must also have the Project privilege.
<b>Owner</b>	A User can act as the owner of this Project. The User will be able to do anything to the Project that the owner can, as long as the User's privileges allow it.

Note:

Groups(N) - (N)None denies all levels of access to Users on the Group from accessing this Project. The Users on the Group will have no access to the Project even if the Users are on other Groups that are associated to this Project. However, if an individual User is associated to this Project, that access will override the access given to them by being on a Group. If a User is the owner of the Project, a Records Manager, or an Admin, they will still have Owner access to the Project.

Users(N) - (N)None denies all levels of access to Users from accessing this Project. An individual User's access overrides any access given to them by being on a Group. If a User is the owner of the Project, a Records Manager, or an Admin, they will still have Owner access to the Project.

Access for a Project

- If a Group has been associated, click on the Group Name to display the Group Info and Group Members.
- If a User has been associated, click on the User Name to display the User Info for that User.
- None indicates that no Groups or Users have been associated.

### 4.3. Attachments

Attachments give users the ability to attach one or more files to Documents and Generations. This allows adding additional files which are related to the main Document or Generation, without creating additional Generations that aren't of the same file the Document was created with.

#### 4.3.1. Adding an Attachment

Add Attachment allows a user the capability to add an Attachment to a Document or Generation. An Attachment consists of a file and optional description.

- The user must have Modify access to the Document or Generation.
- The user must attach a file.

**Navigation:** [DocMgr > Explorer > Select Desired Document or Generation > Side Menu > Attachments > Side Menu > Add]

#### **Step 1:**

1. Optionally, enter a description in the Description Text box.

2. Optionally, enter an external UUID in the External UUID Text box. The external UUID, if present, can be used in a fetch URL to fetch the attachment without using its internal TechDoc ID. This field is primarily used to interface with external systems.
3. Enter the creator in the Creator box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign the creator of an Attachment.
4. Enter the reason for adding the Attachment in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
5. Click the Cancel button to cancel the command or click the Next button to continue.

#### Step 2:

1. Click on the Browse... button and locate the file to be stored for this Attachment in the Document Manager.

Note: The File Upload box will be displayed.

2. In the Look in box select the drive/folder where the file to be stored in the Document Manager is located. To display all of the files in a folder click on the down arrow and select All Files (\*.\*). Click on the file to be stored in the Document Manager. This will automatically insert the filename in the Attachment box. Click the Open button.

Note: If you add an attachment, clicking OK will begin a file upload process. This may take a few minutes depending on the size of the file being uploaded. Please be patient.

3. Click the OK button to add the Attachment to the Document or Generation.

#### Notes:

- A history record will be generated for the Document or Generation having an Attachment added.
- Email will be sent to the notification associated with the Document.

### 4.3.2. Modifying an Attachment

Modify Attachment allows a user the capability to modify an existing Attachment. An Attachment consists of a file and optional description.

- The user must have Modify access to the Attachment.

**Navigation:** [DocMgr > Explorer > Select Desired Document or Generation > Side Menu > Attachments > Select Desired Attachment > Side Menu > Modify]

#### Step 1:



1. If applicable, modify the description in the Description Text box.
2. If applicable, modify the external UUID in the External UUID Text box. The external UUID, if present, can be used in a fetch URL to fetch the attachment without using its internal TechDoc ID. This field is primarily used to interface with external systems.
3. If applicable, modify the Attachment creator in the Creator box by clicking on the down arrow and selecting a name from the list. Note: Only an Admin can modify the Creator of an Attachment.
4. Enter the reason for modifying the Attachment in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
5. Click the Cancel button to cancel the command or click the OK button to modify the Attachment.

Notes:

- A history record will be generated for the modification of the Attachment.
- Email will be sent to the notification associated with the Document.

### 4.3.3. Deleting an Attachment

Delete Attachment deletes an existing Attachment in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The user must have Delete access to the Attachment.

**Navigation:** *[DocMgr > Explorer > Select Desired Document or Generation > Side Menu > Attachments Select Desired Attachment > Side Menu > Delete]*

**Step 1:**

The Attachment to be deleted is displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Attachment to be deleted is displayed.

1. Enter the reason for deleting the Attachment in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Attachment.

Notes:

- The Attachment record will be deleted.
- A history record will be generated for deletion of the Attachment.

#### 4.3.4. Showing Attachments

The Attachment attributes are displayed. Attachments consist of a file and optional description. To view attachment, from the Attachment side menu, click on Fetch or click on the link in the Attachment field.

##### ***A Specific Attachment***

***Navigation:*** [DocMgr > Explorer > Select Desired Document or Generation > Side Menu > Attachments > Select Desired Attachment]

Field Name	Definition
<b>ID</b>	The unique ID number of the Attachment.
<b>Description</b>	The optional description for the Attachment.
<b>Doc Number</b>	Document number this Attachment is associated to. Click on the Document number to see all Generations of this Document.
<b>Gen Number</b>	Generation number this Attachment is associated to. Click on the Generation number to see the Generation.
<b>Created By</b>	The User that created this Attachment. Click the username to display the User Info screen.
<b>Create Date</b>	The date and time this Attachment was created.
<b>File Name</b>	The file name for this Attachment when this Attachment is fetched. The size of the uncompressed physical file associated with this Attachment. Click on the link to open the Attachment.
<b>File Size</b>	The size of the file.
<b>Mime Type</b>	The file type.
<b>Fetch Access</b>	The Fetch Access assigned to this Attachment.
<b>File Path</b>	The path where the physical file is stored is displayed. Only an Admin can view the file path of an Attachment.



<b>External UUID</b>	The External UUID, if present, can be used in a fetch URL to fetch the attachment without using it's internal TechDoc ID. This field is primarily used to interface with external systems.
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All Attachments

**Navigation:** [DocMgr > Explorer > Select Desired Document or Generation > Side Menu > Attachments]

All Attachments displays all the Attachments for a specific Document or Generation.

The User must have Read access to the Document or Generation that the Attachment(s) belong to.

- The ID, File Name, File Size, and Description are displayed for each Attachment.
- The number of Attachments is shown.
- The Attachments are listed in descending order by the ID.
- Click on  to View Attachment.
- Click on  to Show Info of the specific Attachment.

## 4.4. Cabinets

A Cabinet is used to organize Folders and Documents. Essentially, a Cabinet is a Folder with no parent. Because there is no parent to check permissions against, special privileges are required to create, modify, and delete Cabinets.

### 4.4.1. Creating a Cabinet

Create Cabinet creates a Cabinet in the Document Manager. Cabinets are created to allow for the hierarchical Organization of Documents by projects, Organizations, Document Types, etc.

The system is arranged by Cabinets. Folders reside in the Cabinet. Documents may be in a Folder or Cabinet. Folders can have subfolders.

- The user must have the Create Cabinet privilege.
- The name of the new Cabinet cannot be the same as any other Cabinet.

**Navigation:** [DocMgr > Explorer > Navigate to Root > Side Menu > Create Cabinet]

**Step 1:**

1. Enter the Cabinet name in the Name box. Cabinet names must be unique within the same Document Manager. Cabinet name is a required field. The maximum length of this field is 64 characters. Note: The FolderNameCharacters System Property is a list of all the valid characters allowed in a Cabinet name.
2. Enter the description of the Cabinet in the Description box. The maximum length of this field is 128 characters.
3. Enter the owner of the Cabinet in the Owner box by clicking on the down arrow and selecting a name from the list.
4. By default, the owner of the Cabinet will automatically be added to the notification list of the Cabinet. If you do not want the owner of the Cabinet to be added to the notification list, uncheck the box next to "Check to add owner to the notification list".
5. By default, your Organization is entered in the Organization box. If you need to change the Organization, click on the down arrow and select it from the list. The Organization selected will be the Organization this Cabinet will belong to.
6. If the Documents created in this Cabinet should have RMA Records generated for them automatically, select an RMA File Plan in the RMA File Plan box by clicking the down arrow and selecting a File Plan from the list. If automatic Records are not desired, leave this box blank.
7. Enter the reason for creating the Cabinet in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
8. Click the Cancel button to cancel the command, or click the OK button to create the Cabinet.

#### Notes:

- A new Cabinet will be created.
- If "Check to add owner to the notification list" is checked, then the owner will be added to the notification list.
- A history record will be generated for creation of the Cabinet.
- Email will be sent to the owner if "Check to add owner to the notification list" was checked.
- The Cabinet will have the access specified by the DefaultFolderReadAccess System Property if access is not updated at the time the Cabinet is created.

#### **4.4.2. Modifying a Cabinet**

Modify Cabinet modifies an existing Cabinet in the Document Manager. You must have appropriate access to the Cabinet in order to modify the Cabinet attributes. All of the fields on the Modify Cabinet screen can be modified. All of the Cabinet attributes can be modified.

#### Note for Admins:

If the system is currently set up to use home Folders for Users by Organization, and you modify a Cabinet name, you also need to modify the Organization's abbreviation. For example, if you

modify Cabinet name xyz and change it to zzz, you will need to modify the abbreviation of Organization xyz and change it to zzz.

- The user must have the Modify Cabinet privilege.
- The user must have Modify access to the Cabinet.
- Only the Document Administrator can change the owner of a Cabinet.
- The name of the specified Cabinet cannot be changed to a name being used by another Cabinet in the system.

**Navigation:** [*DocMgr > Explorer > Select Desired Cabinet > Side Menu > Modify*]

**Step 1:**

1. If applicable, modify the Cabinet name in the Name box. Cabinet names must be unique within the same Document Manager. Cabinet name is a required field. The maximum length of this field is 64 characters. Note: The FolderNameCharacters System Property is a list of all the valid characters allowed in a Cabinet name. Only an Admin can view and/or modify System Properties.
2. If applicable, modify the description of the Cabinet in the Description box. The maximum length of this field is 128 characters.
3. If applicable, modify the owner of the Cabinet in the Owner box by clicking on the down arrow and selecting a name from the list. Only an Admin can assign the owner of a Cabinet.
4. If applicable, if the owner of the Cabinet needs to be on the notification list, verify the box next to "Check to add owner to the notification list" is checked. If the owner of the Cabinet does not need to be on the notification list, verify the box next to "Check to add owner to the notification list" is not checked.
5. If applicable, modify the Organization in the Organization box by clicking on the down arrow and selecting an Organization from the list. The Organization Selected is the Organization the Cabinet will belong to.
6. Enter the reason for modifying the Cabinet in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
7. Click the Cancel button to cancel the command, or click the OK button to modify the Cabinet.

**Notes:**

- The existing Cabinet record will be modified.
- If the owner has been changed, then any private Groups for the previous owner will be removed from the access and notification lists for this Cabinet.
- If "Check to add owner to the notification list" is checked and if the owner is not already on the notification list then they will be added.
- A history record will be generated for modification of the Cabinet.
- E-mail will be sent to the notification associated with the modified Cabinet.

### 4.4.3. Deleting a Cabinet

Delete Cabinet deletes an existing Cabinet in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Delete Cabinet privilege.
- The User must have the Delete access to the Cabinet.
- The specified Cabinet cannot be deleted if it contains any Folders and/or Documents.

**Navigation:** *[DocMgr > Explorer > Select Desired Cabinet > Side Menu > Delete]*

#### **Step 1:**

The Cabinet to be deleted and the Cabinet attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

#### **Step 2:**

The Cabinet to be deleted and the Cabinet attributes are displayed.

1. Enter the reason for deleting the Cabinet in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Cabinet.

#### **Notes:**

- The Cabinet record will be deleted.
- All associations for access and notification to the Cabinet will be deleted.
- A history record will be generated for deletion of the Cabinet.
- Email will be sent to the notification associated with the Cabinet before deletion.

### 4.4.4. Moving the Contents of a Folder or Cabinet

Move Contents allows a User the capability to move Folders and Documents from a source Folder/Cabinet to a destination Folder/Cabinet. The User must have appropriate access to the Folder/Cabinet the Folders and Documents reside in. The User must have appropriate access to where the Folders and Documents that are being moved, and the User must have appropriate access to the Folder/Cabinet where the Folders and Documents are being moved to.

- If the User is moving documents...
  - The User must have the Modify Document privilege.
  - The User must have Modify access to each document that is being moved.

- The User must have Create Document access to the destination Folder/Cabinet.
- If the User is moving folders...
  - The User must have the Modify Folder privilege.
  - The User must have Modify access to each folder that is being moved.
  - The User must have Create Folder access to the destination Folder/Cabinet.

**Navigation:** [DocMgr > Explorer > Select Desired Folder or Cabinet > Side Menu > Move Contents]

### Step 1:

1. Enter the reason for moving the Folders and/or Documents in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command or click the Next button to continue.

### Step 2:

User must have appropriate access to the contents that are being moved.

The Name/Number and Description/Title are displayed for each Folder and/or Document.

Note: If the Document is reserved or in review the icons below will be displayed.



indicates that the specific Document is reserved.



indicates that the specified Document is in review.






indicates that the specified Document is reserved and in review.

1. Select the contents to be moved by clicking in the box, in the Move column, in front of each Folder and/or Document to be moved. This will place a check in the box. You can check each Document and/or Folder individually or you can click the Select All button to select all the Documents and/or Folders. Only the Documents and/or Folders with a check in the box will be moved.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, click the Select All button to select all the Documents and/or Folders, click the Unselect All button to uncheck all previously checked Documents and/or Folders, click the Next button to continue.

### Step 3:

User must have appropriate access to where the contents are being moved.

- The contents cannot be moved to root.
  - The contents cannot be moved if the source and destination Folders/Cabinets are the same.
  - The contents cannot be moved to a Folder that is also being moved.
  - A Folder cannot be moved to any of its own descendent Folders.
  - A Folder cannot be moved to a Folder/Cabinet that has a subfolder with the same name already in it.
1. Navigate to the destination Folder or Cabinet where the contents are being moved to, by clicking on the appropriate , , or  icons just like navigating the Folder tree in the Explorer.
  2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to move contents.

## Notes:

- A history record will be generated for the movement of each Folder and Document being moved.
- E-mail will be sent to the notification associated with the source Folder/Cabinet, the notification associated with the destination Folder/Cabinet, the notification associated with each Folder being moved, and the notification associated with each Document being moved.

#### 4.4.5. Showing a Cabinet

Cabinet Info displays the full details for a specific Cabinet.

**Navigation:** *[DocMgr > Explorer > Select Desired Cabinet > Side Menu > Show Info]*

The User must have Read access to the Cabinet.

Field Name	Definition
<b>Parent</b>	Who this Cabinet belongs to. Cabinets are at the root.
<b>Name</b>	The name of this Cabinet.
<b>Description</b>	The description of this Cabinet.
<b>Owner</b>	The owner of this Cabinet. Click the owner's name link to display the User Info screen.
<b>Organization</b>	The Organization this Cabinet belongs to.



<b>RMA File Plan</b>	The RMA File Plan set on this Cabinet if automatic Records are being generated.
<b>RMA Record Set</b>	The RMA Record Set used by this Cabinet if automatic Records are being generated.
<b>Created</b>	The date and time this Cabinet was created.
<b>Modified</b>	The date and time this Cabinet was last modified.

## 4.5. Discussions

Discussions allow the capability to capture the Discussions that take place during the Review cycle of a Document. Because Reviews typically occur in multiple stages or levels, this feature can be extremely helpful for people in the later stages of a Review. It allows you to see what issues have already been found and how they were resolved.

### 4.5.1. Creating a Discussion

Create Discussion creates a new Discussion topic for a Review or a reply to an existing Discussion. Discussions allow the capability to capture the Discussions that take place during the review cycle of a Document. Because reviews typically occur in multiple stages or levels, this feature will be extremely helpful for people in the later stages of a review. It allows you to see what issues have already been found and how they were resolved.

- If the User is not the Review Leader or a member of the Review, the Review must have the Allow Open Posting property set to Yes and the User must have Read access to the Document that the Review is for.
- If the new Discussion is a reply to an existing Discussion:
  - The subject will be prefilled with the original Discussion's subject prefaced with "Re:", but is modifiable.
  - The original Discussion's details will be displayed below the input fields.
  - A reply cannot be a topic and therefore cannot be assigned a priority level by the Review Leader or an Admin.
  - The heading above the subject field will say "Reply to '*Subject of Original Discussion*'"
- If the new Discussion is a topic Discussion:
  - The subject will be blank.
  - If the current User is the Review Leader or an Admin, the announcement field is available to be able to choose a priority if desired.
  - The heading above the subject field will say "New Discussion for Review '*DocNum, Rev Basic (1000)*'."
- If an attachment is added, the body text is optional and if left blank will display "No text, see attachment."

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes > New Topic]*

**Step 1:**

1. Enter the subject of the new Discussion in the Subject box. This is a required field. The maximum length of this field is 128 characters.
2. Enter the body text of the Discussion in the Body Text box. This is a required field, if there is not file attachment. The length of this field is unlimited.
3. To add an attachment, at the Attachment box click on the Browse... button to locate the file to be attached to the Discussion.

Note: The File Upload box will be displayed.

4. Click the Cancel button to cancel the command or click the OK button to create the new Discussion.

#### 4.5.2. Deleting a Discussion

Delete Discussion deletes an existing Discussion in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The user must have the Admin privilege.

**Navigation:** *[N/A]*

**Step 1:**

The Discussion to be deleted and the Discussion attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Discussion to be deleted and the Discussion attributes are displayed.

1. Enter the reason for deleting the Discussion in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Discussion.

Notes:

- The Discussion record will be deleted.

- A history record will be generated for deletion of the Discussion.

### 4.5.3. Showing Discussions

Show Discussions displays a specific Discussion or all of the Discussions open on a Review.

#### ***A Specific Discussion***

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes > Select Desired Discussion*]

Show Info for a Discussion shows the full details for a specific Discussion. The User must have Read access to the Review that the Discussion is related to. Discussion text is displayed as a block of text and/or attachment. To view an attachment, click on the link in the Attachment field, or from the Discussion side menu, click on Fetch.









Field Name	Definition
<b>Review</b>	The Review that this Discussion is related to is displayed as the Document number followed by the revision and then the Review id in parenthesis. Click the Review name to display the collapsed tree view for the Review.
<b>Posted By</b>	The User that posted this Discussion. Click the username to display the User Info screen.
<b>Date Posted</b>	The date and time this Discussion was created/posted.
<b>Announcement</b>	If a priority was specified, this field is displayed with the priority level. If no priority was specified, this field is not displayed.
<b>Subject</b>	The subject of the Discussion.
<b>Attachment</b>	The file name for this attachment when this attachment is fetched followed by the size of the uncompressed physical file associated with this attachment. Click on the link to open the attachment. None indicates no file was attached.
<b>File Path</b>	If the Discussion has an attachment, the path where the physical file is stored is displayed. Note: Only an Admin can view the file path of an attachment.
<b>Body Text</b>	If the Discussion was added as a block of text then the entire text is displayed. If the Discussion only has an attachment with no body text then the following message text is displayed: "No text, see attachment."

- Note: Only the Review leader or an Admin can specify a priority for a Discussion.
- Note: If there is not an attachment for the Discussion then None is displayed in the Attachment and File Path fields.
- Discussion Subscriptions:
  - Click on the Subscribe option in the side menu to subscribe to a Discussion. The Discussion, whether a topic or a reply, can be subscribed to. When a User subscribes to a Discussion, then that User will receive an email every time that a reply is posted anywhere in that particular Discussion's tree. If the User is already subscribed to the Discussion or to a parent of the Discussion the following message is displayed: "You are already subscribed to...", otherwise the following message is displayed: "You have been successfully subscribed to..."
  - Click on the UnSubscribe option in the side menu to unsubscribe from a Discussion. If the User is not subscribed to the current Discussion, the following message is displayed: "You are not currently subscribed to this Discussion", otherwise the following message is displayed: "You have been successfully unsubscribed..."

#### All Discussions for a Review

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes]

Show Discussion displays all Discussion topics for a specific Review.

- The Posted By, Subject, Priority, Date and Number of Replies are displayed for each Discussion.
- The number of Discussion topics is shown.
- The Discussion topics are listed in descending order by priority. The Vote topic is always displayed first, followed by any topics with Priority 1, then any topics with Priority 2, then any topics with Priority 3, and finally by any topics with no priority specified at all. Note: There will not be a Vote topic until a Review is started.
- Click on  to View Discussion.  indicates a Discussion topic for all vote remarks.
- Click on  to View Discussion.  indicates a Discussion topic that has been assigned a priority.
- Click on  to View Discussion.  indicates a Discussion topic that has not been assigned a priority.
- Click on  to Show Info of the specific Discussion.
- If an attachment was added, click on  to Fetch the attachment. Note: If an attachment was added and no text was entered in the body text field the following message will be displayed as the body text: "No text, see attachment."
- Discussion Subscriptions:
  - Click on the Subscribe option in the side menu to subscribe to all Discussions for a Review. When a User subscribes to all Discussions for a Review, then that User








will receive an email every time that a Discussion is posted for that Review. If the User is already subscribed to all Discussions for the Review, the following message is displayed: "You are already subscribed to...", otherwise the following message is displayed: "You have been successfully subscribed to..."

- Click on the UnSubscribe option in the side menu to unsubscribe from a Review for all Discussions. If the User is not subscribed to the current Discussion, the following message is displayed: "You are not currently subscribed to this Discussion.", otherwise the following message is displayed: "You have been successfully unsubscribed..."

### Showing the Tree View of a Discussions for a Review

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes > Select Desired Discussion]

The Discussion tree displays the currently selected Discussion with its parent Discussion above the currently selected Discussion and any direct replies below it. The currently selected Discussion is the Discussion that is highlighted in yellow. If the current Discussion is a topic, then a link to show all topics for the Review is displayed above the currently selected Discussion. This tree view can be used to traverse a Discussion tree from top to bottom by clicking on the Discussion icons.






- The Posted By (which includes the posted date and time), Subject, Number of Replies, and the Body Text are displayed for each Discussion that is a reply to the selected Discussion and to the parent of the selected Discussion if the current Discussion is not a topic.
- The number of posts to the selected Discussion is shown.
- The Discussion's parent Discussion, if the current Discussion is not a topic, is displayed above and any direct replies are displayed below the current Discussion.
- Click on  to View All topics for Review. This option is not available if the currently selected Discussion is not a topic.
- Click on  to Show Discussion Tree to repaint the form if the topic is the currently selected Discussion, or to make the topic the currently selected Discussion. This icon will be  if the Discussion has been assigned a priority by the Review leader.
- Click on  to Show Discussion Tree to repaint the form or to make another Discussion in the tree the currently selected Discussion.
- Click on  to Show Info and details of the specific Discussion.
- Click  to Reply to the Discussion.
- If an attachment was added, click on  to Fetch the attachment. Note: If an attachment was added and no text was entered in the body text field the following message will be displayed: "No text, see attachment."



- The text of the Discussion is displayed below the Posted By and Subject fields.
- Discussion Subscriptions:
  - Click on the Subscribe option in the side menu to subscribe to a Discussion. The Discussion, whether a topic or a reply, can be subscribed to. When a User subscribes to a Discussion, then that User will receive an email every time that a reply is posted anywhere in that particular Discussion's tree. If the User is already subscribed to the Discussion or to a parent of the Discussion the following message is displayed: "You are already subscribed to...", otherwise the following message is displayed: "You have been successfully subscribed to..."
  - Click on the UnSubscribe option in the side menu to unsubscribe from a Discussion. If the User is not subscribed to the current Discussion, the following message is displayed: "You are not currently subscribed to this Discussion", otherwise the following message is displayed: "You have been successfully unsubscribed..."

#### Showing the Full Tree View of a Discussions for a Review

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes > Select Desired Discussion > Side Menu > Show Tree]

This view of Discussions is displayed when the Show Tree link is clicked on the side menu. The full Discussion tree displays the currently selected Discussion with its parent Discussion above the currently selected Discussion and all replies to the currently selected Discussion and its replies below it. The currently selected Discussion is the Discussion that is highlighted in yellow. If the current Discussion is a topic, then a link to show all topics for the Review is displayed above the currently selected Discussion. This tree view can also be used to traverse a Discussion tree quickly by being able to jump to a specific Discussion in the entire tree.

- The Posted By (which includes the posted date and time), Subject, Number of Replies, and the Body Text are displayed for each Discussion in the current Discussion's tree.
- The number of posts to the currently selected Discussion is shown.
- The Discussion's parent Discussion, if the current Discussion is not a topic, is displayed above and ALL replies are displayed below the current Discussion.
- Click on  to View All topics for Review. This option is not available if the currently selected Discussion is not a topic.
- Click on  to Show Discussion Tree to repaint the form if the topic is the currently selected Discussion, or to make the topic the currently selected Discussion. This icon will be  if the Discussion has been assigned a priority by the Review leader.
- Click on  to Show Discussion Tree to repaint the form or to make another Discussion in the tree the currently selected Discussion.
- Click on  to Show Info and details of the specific Discussion.

- Click  to Reply to the Discussion.
- If an attachment was added, click on  to Fetch the attachment. Note: If an attachment was added and no text was entered in the body text field the following message will be displayed: "No text, see attachment."
- The text of the Discussion is displayed below the Posted By and Subject fields.
- Discussion Subscriptions:
  - Click on the Subscribe option in the side menu to subscribe to a Discussion. The Discussion, whether a topic or a reply, can be subscribed to. When a User subscribes to a Discussion, then that User will receive an email every time that a reply is posted anywhere in that particular Discussion's tree. If the User is already subscribed to the Discussion or to a parent of the Discussion the following message is displayed: "You are already subscribed to...", otherwise the following message is displayed: "You have been successfully subscribed to..."
  - Click on the UnSubscribe option in the side menu to unsubscribe from a Discussion. If the User is not subscribed to the current Discussion, the following message is displayed: "You are not currently subscribed to this Discussion.", otherwise the following message is displayed: "You have been successfully unsubscribed..."

#### 4.5.4. Subscribing to a Discussion

Subscribe to Discussion is used to subscribe the current user to the specified discussion. Once a user is subscribed to a discussion, the user will receive emails for all new replies posted to the discussion.

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes > Side Menu > Subscribe]

#### 4.5.5. Unsubscribing to a Discussion

Unsubscribe to Discussion is used to unsubscribe the current user from the specified discussion. Once a user is no longer subscribed to a discussion, the user will not receive any more emails when new replies are posted to the discussion.

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes > Side Menu > Unsubscribe]

### 4.6. Documents

A Document is the primary object in TechDoc. A Document includes the metadata about the Document (such as Title, Document Type, Point of Contact, etc) as well as all Generations (the different versions) of the Document. TechDoc provides granular security, email Distribution/Notification services, History, and online Review for each Document in the system.

### 4.6.1. Creating a Document

Create Document creates a new Document and its first Generation in the Document Manager. A Document includes the metadata about the Document (such as title, Doc Type, point of contact, etc.) as well as all Generations (the different versions) of the Document. TechDoc provides granular security, email distribution/notification services, history, and online Review for each Document in the system.

- The User must have the Create Document privilege.
- The User must have Create Document access to the parent Folder.
- The Document number of the new Document cannot be the same as any other Document in the Document Manager.
- The Document's selected Doc Category must allow Documents of this category to be permitted in the Document Manager.
- The web search of the Document must not be higher than the Doc Category's highest allowed web search value.

**Navigation:** [*DocMgr > Explorer > Navigate to Desired Location > Side Menu > Create Document*]

#### **Step 1:**

1. Enter the Document number in the Number box. The Document number must be unique within the same Document Manager. Document number is a required field. The maximum length of this field is 255 characters. Note: The DocNumberCharacters System Property is a list of all the valid characters allowed in a Document number or MetricDocNumberRegex if this system supports Metrics. Note: Only an Admin can view/modify System Properties.
2. Enter the Document title in the Title box. The maximum length of this field is 1000 characters.
3. Enter the Document's Doc Type in the Doc Type box by clicking on the down arrow and selecting it from the list. This field is mandatory and cannot be left as Choose One. The Doc Type usually refers to the functional use of the Document (meeting minutes, presentations, standard practices, etc.) rather than content type (Word, Excel, etc.).
4. Enter the Document's Doc Category in the Doc Category box by clicking on the down arrow and selecting it from the list. This field is mandatory and cannot be left as Choose One. The Doc Category usually refers to the classification of the Document (ITAR/EAR, Trade Secret, Privileged/Proprietary, Commercial/Financial, Non-Sensitive, etc). See [Doc Category Definitions](#) for more information.
5. Enter the Document owner in the Owner box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign the owner of a Document.
6. By default, you/the Document owner will automatically be added to the distribution and notification list of this Document. If you do not want yourself/the Document owner to



be added to the distribution list, uncheck the box next to "Check to add myself to the distribution list" or "Check to add owner to the distribution list". If you do not want yourself/the Document owner to be added to the notification list, uncheck the box next to "Check to add myself to the notification list" or "Check to add owner to the notification list".

Note: Distribution lists consist of Users that are notified when the Document has been released. Notification lists consist of Users that are notified when a Document has been reserved/replaced; attributes of Document have been modified; Document has been released, and when Document has been deleted.

If the User is on both the distribution and notification lists, they will receive only one email message when the Document is released.

7. Enter the Document point of contact in the Point of Contact box. The point of contact is the person responsible for the content of the Document. The maximum length of this field is 48 characters.
8. By default, your Organization is entered in the Organization box. If you need to change the Organization, click on the down arrow and select it from the list. The selected Organization is the Organization the Document will belong to.
9. Enter the web search in the Web Search box by clicking on the down arrow and selecting it from the list. Note: The DefaultDocWebSearch System Property is the default web search value when creating a Document.

Note: Only an Admin can view/modify System Properties. Reference System Properties to modify Web Search drop down list.

<b>Web Search</b>	<b>Definition</b>
<b>No</b>	Document attributes are not sent to the Search Manager(s). The Document is not searchable from the Search Manager(s). The Document is searchable on the Document Manager.
<b>Community</b>	The Document is searchable via the web to anyone within the organization and partner IP addresses.
<b>Global</b>	The Document is available to anyone anywhere on the World Wide Web.

10. Enter the resident status of the Document in the Resident Document box by clicking on the down arrow and selecting Yes or No from the list. Starting with TechDoc 6a, TechDoc supports nonresident Documents. Selecting No specifies that a Document is nonresident. A nonresident Document is a Document that does not have the electronic file(s) actually stored in TechDoc. This allows a Document to be created to track an

external object such as a physical item (video tape, microfiche, hardcopy book, etc), an item that is located somewhere else and is not allowed to be duplicated on your system (an article in a publication, proprietary or classified data on another system), etc.

11. Enter the reason for creating the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
12. Click the Cancel button to cancel the command or click the Next button to continue.

#### Step 2:

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

1. Enter the name of the official responsible for this Metric in the Metric Resp. Official box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One.
2. Enter the name of the point of contact for this Metric in the Metric POC box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One.
3. Enter the Metric Organization responsible for this Metric in the Metric Organization box by clicking on the down arrow and selecting an Organization from the list. This field is mandatory and cannot be left as Choose One.
4. Enter the frequency for this Metric in the Metric Frequency box by clicking on the down arrow and selecting the frequency from the list. This field is mandatory and cannot be left as Choose One.
5. Enter the reporting lag days for this Metric in the Reporting Lag Days box. Note: Reference the MetricDefaultReportingLagDays System Property for the default reporting lag days to use when creating a new Metric. Note: Only an Admin can view/modify System Properties.

The reporting lag days is the number of days it normally takes to prepare a Metric after the period being reported on ends. The reporting lag days is one of the things used to determine if a Metric is out of date. The system finds the latest Metric date for the Metric being checked, then adds the number of days appropriate for the frequency of the Metric to that date, and then adds the reporting lag days to that date. If the calculated date is prior to today, the Metric is considered late.

For example, say you have a Metric whose latest Metric date is 03/31/2004, it's a quarterly Metric with a report lag of 15 days. We add 3 months (the frequency) to 03/31/2004, to get 06/30/2004, and then add 15 days (the reporting lag), to get 07/15/2004. That means that the Metric will be late if a new Generation of the Metric is not put in and made active by 07/15/2004. The Metric date for the new Generation would most likely be 06/30/2004 (the end of the next quarter after 03/31/2004).

Metric Type Filters are displayed on the Key Performance Indicator (KPI) NMIS dashboard in the Filters drop-down list.

Note: When a Metric Type is created by the Document Administrator the User Settable Type field can be set to Yes or No. If the User Settable Type field is set to No, the Metric Type to filter this Document By can only be changed by the Document administrator.

1. Select the Metric Type to Filter by clicking on the down arrow.
  - Yes - Metric will be displayed when this Metric Type (i.e. BOA) is selected from the Filters drop-down on the KPI NMIS dashboard.
  - No - Metric will not be displayed when this Metric Type (i.e. BOA) is selected from the Filters drop-down on the KPI NMIS dashboard.
  - If all Metric Types to Filter are set to No (i.e. BOA - No, Center-level - No) then this Metric will be displayed when Other is selected from the Filters drop-down on the KPI NMIS dashboard.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to continue.

Step 3:

Keywords are User-defined attributes that can be assigned to a Document. A Doc Type can specify which Keywords are automatically displayed during the creation or modification of a Document. A Doc Type can also specify which Keywords are optional and which Keywords are required. This screen will vary depending on the Doc Type selected from the previous screen. Keywords can be displayed as a text field, or a drop down box. If no Keyword has been associated to the Doc Type, only the New Keyword box will be displayed.

For required Keywords, the User must enter a value in the Keyword field. If required Keyword is in a drop down box, click on the down arrow and select Keyword from the list. You cannot leave the value as Choose One. Note: The Remove button is not available on required Keywords.

For optional Keywords, the User has the option to enter a value in the Keyword field or click the Remove button to remove it. Note: If no data is entered in optional Keyword field, it is not necessary to click the Remove button to remove it. The system automatically removes Keyword fields that contain no data.

The User also has the option to add a new Keyword by clicking on the down arrow in the New Keyword box and selecting a Keyword from the list. Click on the Add button to add the new Keyword to the Document.

1. If there were no required and/or optional Keywords associated to this Doc Type and you do not desire to add a new Keyword, click the Next button to continue.

or

2. Enter the required, optional, or new Keywords as required.
3. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen or click the Next button to continue.

Step 4:

The User is now ready to store the Document in the Document Manager. The Document Manager will accept any type of file.

If the current Document being created is a nonresident Document, then there is no need to provide the File or fetch access information. You can skip to here for a nonresident Document.

1. At the File box click on the Browse... button to locate the file to be stored in the Document Manager.

Note: The File Upload box will be displayed.

2. In the Look in box select the drive/folder where the Document to be stored in the Document Manager is located. To display all of the files in the folder, in the Files of type box, click on the down arrow and select All Files (\*.\*). Click on the file to be stored in the Document Manager. This will automatically insert the filename in the File name box. Click the Open button.

Note: Restricted Fetch Access allows you to add additional security to the Document.

3. In the Fetch Access box, leave this set to Normal unless you need to add additional security to the Document.

Fetch Access	Definition
<b>Normal</b>	Allows anyone within the selected domain Read access.
<b>Restricted</b>	Automatically removes read access from the Document. To fetch the Document, Document owner must add users to the access list and assign them read access, or if a password has been assigned to the Generation you must know the password. To add a password to a Generation see Modify Generation. For further assistance, contact the Help Desk.

4. For a nonresident Document, optionally enter the URL in the Nonresident URL box. When specified, this URL identifies where the Document can be found on the Internet. If this Document is released and sent to a Search Manager, this URL will be used as the fetch URL for the Document. The maximum length of this field is 2000 characters.

5. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to create the Document.

#### Notes:

- The first Generation of the Document will be created.
- A file will be transferred from the User's machine representing the Generation if the Document is resident. If the file name has multiple adjacent periods in it, they will be replaced with a single period.
- If the Document's selected Doc Category has the store encrypted flag set, then the Document will be stored encrypted, otherwise it will be stored in its native format.
- If "Check to add myself to the distribution list" or "Check to add owner to the distribution list" is checked, then the owner will be added to the distribution list.
- If "Check to add myself to the notification list" or "Check to add owner to the notification list" is checked, then the owner will be added to the notification list.
- If a Doc Category is selected that has a highest allowed read access that is lower than the default read access, then the read access will be automatically lowered to the highest allowed value.
- A history record will be generated for creation of a Document.
- Email will be sent to the notification associated with the parent Folder/Cabinet and to you/the owner if "Check to add myself to the notification list" or "Check to add owner to the notification list" was checked.
- If web search is set to something other than no, an update request is inserted into the Search Manager Updates table for each Search Manager Host that should be notified about the creation of the Document.
- The Document will have the access specified by the DefaultDocReadAccess System Property if access is not updated at the time the Document is created.
- If metrics are enabled and the Document is a Metric, a new second screen comes up between the first screen and the Keywords screen.
- The new screen has five fields: Metric Resp. Official, Metric POC, Metric Organization, Metric Frequency and Reporting Lag Days.
- Below the five fields, will be a list of all the current Metric Types defined in the system. If a Metric Type has its "User Settable Type" field set to No, non-Admin users will not be able to change the value for that type. If all types are set to No, the Metric will be considered a Metric Type of "Other" on the Metrics dashboard.

### 4.6.2. Modifying a Document

Modify Document modifies an existing Document's attributes. A Document includes the metadata about the Document (such as title, Doc Type, point of contact, etc.) as well as all Generations (the different versions) of the Document. TechDoc provides granular security, email distribution/notification services, history, and online Review for each Document in the system.

- The User must have the Modify Document privilege.
- The User must have Modify access to the Document.
- If the Doc Category is changed, the new Doc Category must allow Documents of this type to be stored.
- If the Doc Category is changed, the web search must be lower than the new Doc Category's highest allowed web search.

**Navigation:** [[DocMgr](#) > [Explorer](#) > [Select Desired Document](#) > [Side Menu](#) > [Modify](#)]

**Step 1:**

1. If applicable, modify the Document number in the Number box. If the DocNumbersModifiable System Property is set to No, only the Document Administrator can modify the Document number. The Document number must be unique within the same Document Manager. Document number is a required field. The maximum length of this field is 255 characters. Note: The DocNumberCharacters System Property is a list of all the valid characters allowed in a Document number or MetricDocNumberRegEx if this system supports Metrics.
2. If applicable, modify the Document title in the Title box. The maximum length of this field is 1000 characters.
3. If applicable, modify the Document's Doc Type in the Doc Type box by clicking on the down arrow and selecting it from the list. Doc Type usually refers to the functional use of the Document (meeting minutes, presentations, standard practices, etc.) rather than content type (Word, Excel, etc.).
4. If applicable, modify the Document's Doc Category in the Doc Category box by clicking on the down arrow and selecting it from the list. This category usually refers to the classification of the Document (ITAR/EAR, Trade Secret, Privileged/Proprietary, Commercial/Financial, Non-Sensitive, etc). See [Doc Category Definitions](#) for more information.
5. If applicable, modify the Document owner in the Owner box by clicking on the down arrow and selecting a name from the list.

Note: Only an Admin can modify the owner of a Document. Changing the owner of this Document will remove any private Groups associated to this Document.

6. If applicable, to add or remove the Document owner to/from the distribution list, check or uncheck the box next to "Check to add owner to the distribution list". If applicable, to add or remove the Document owner to the notification list, check or uncheck the box next to "Check to add owner to the notification list".

Note: Distribution lists consist of Users that are notified when the Document has been released. Notification lists consist of Users that are notified when a Document has been reserved/replaced; attributes of Document have been modified; Document has been released, and when Document has been deleted.

If the User is on both the distribution and notification lists, they will receive only one email message when the Document is released.

7. If applicable, modify the Document point of contact in the Point of Contact box. The point of contact is the person responsible for the content of the Document. The maximum length of this field is 48 characters.
8. If applicable, modify the Document Organization in the Organization box by clicking on the down arrow and selecting it from the list. The Organization selected is the Organization the Document will belong to.
9. If applicable, modify the web search in the Web Search box by clicking on the down arrow and selecting it from the list.

Web Search	Definition
<b>No</b>	Document attributes are not sent to the Search Manager(s). The Document is not searchable from the Search Manager(s). The Document is searchable on the Document Manager.
<b>Community</b>	The Document is searchable via the web to anyone within the organization and selected partners IP addresses.
<b>Global</b>	The Document is available to anyone anywhere on the World Wide Web.

10. Enter the reason for modifying the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
11. Click the Cancel button to cancel the command or click the Next button to continue.

#### Step 2:

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

1. If applicable, modify the name of the official responsible for this Metric in the Metric Resp. Official box by clicking on the down arrow and selecting a name from the list.
2. If applicable, modify the name of the point of contact for this Metric in the Metric POC box by clicking on the down arrow and selecting a name from the list.
3. If applicable, modify the Metric Organization responsible for this Metric in the Metric Organization box by clicking on the down arrow and selecting an Organization from the list.
4. If applicable, modify the frequency for this Metric in the Metric Frequency box by clicking on the down arrow and selecting the frequency from the list.

5. If applicable, modify the reporting lag days for this Metric in the Reporting Lag Days box. Note: if the MetricReportingLagDaysModifiable System Property is set to No, only the Document Administrator for this system can modify the Reporting Lag Days field.

The reporting lag days is the number of days it normally takes to prepare a Metric after the period being reported on ends. The reporting lag days is one of the things used to determine if a Metric is out of date. The system finds the latest Metric date for the Metric being checked, then adds the number of days appropriate for the frequency of the Metric to that date, and then adds the reporting lag days to that date. If the calculated date is prior to today, the Metric is considered late.

For example, say you have a Metric whose latest Metric date is 03/31/2004, it's a quarterly Metric with a report lag of 15 days. We add 3 months (the frequency) to 03/31/2004, to get 06/30/2004, and then add 15 days (the reporting lag), to get 07/15/2004. That means that the Metric will be late if a new Generation of the Metric is not put in and made active by 07/15/2004. The Metric date for the new Generation would most likely be 06/30/2004 (the end of the next quarter after 03/31/2004).

#### Metric Types to Filter This Document By

Metric Type filters are displayed on the Key Performance Indicator (KPI) NMIS dashboard in the Filters drop-down list.

Note: When a Metric Type is created by the Document Administrator the User Settable Type field can be set to Yes or No. If the User Settable Type field is set to No, the Metric Type to Filter this Document By can only be changed by the Document Administrator.

1. If applicable, modify the Metric Type to Filter by clicking on the down arrow.
  - Yes - Metric will be displayed when this Metric Type (i.e. BOA) is selected from the Filters drop-down on the KPI NMIS dashboard.
  - No - Metric will not be displayed when this Metric Type (i.e. BOA) is selected from the Filters drop-down on the KPI NMIS dashboard.
  - If all Metric Types to Filter are set to No (i.e. BOA - No, Center-level - No) then this Metric will be displayed when Other is selected from the Filters drop-down on the KPI NMIS dashboard.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to continue.

#### Step 3:

Keywords are User-defined attributes that can be assigned to a Document. A Doc Type can specify which Keywords are automatically displayed during the creation or modification of a Document. A Doc Type can also specify which Keywords are optional and which Keywords are required. This screen will vary depending on the Doc Type selected from the previous screen.



Keywords can be displayed as a text field, or a drop down box. If no Keyword has been associated to the Doc Type, only the New Keyword box will be displayed.

For required Keywords, the User must enter a value in the Keyword field. If required Keyword is in a drop down box, click on the down arrow and select Keyword from the list. You cannot leave the value as Choose One. Note: The Remove button is not available on required Keywords.

For optional Keywords, the User has the option to enter a value in the Keyword field or click the Remove button to remove it. Note: If no data is entered in an optional Keyword field, it is not necessary to click the Remove button to remove it. The system automatically removes Keyword fields that contain no data.

The User also has the option to add a new Keyword by clicking on the down arrow in the New Keyword box and selecting a Keyword from the list. Click on the Add button to add the new Keyword to the Document.

1. If there were no required and/or optional Keywords associated to this Doc Type and you do not desire to add a new Keyword, click the Next button to continue.

or

2. If applicable, modify required and optional Keywords, or add new Keywords as required.
3. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen or click the OK button to modify the Document's attributes.

#### Notes:

- If the current User is an Admin:
  - If the owner has been changed, then any private Groups for the previous owner will be removed from the access, notification, and distribution lists for this Document.
  - If "Check to add owner to the distribution list" is checked, and if the owner is not already on the distribution list then they will be added.
  - If "Check to add owner to the notification list" is checked, and if the owner is not already on the notification list then they will be added.
- A history record will be generated for the modification of the Document.
- Email will be sent to the notification associated with the Document.
- If the Doc Category was changed, the Read access may be lowered to the highest allowed Read access of the new Doc Category.
- If the Doc Category was changed and the new Doc Category's store encrypted flag is different from the old, then the encryption task is woken up to either encrypt or decrypt the file according to the new Doc Category setting.

- If web search is unchanged and set to something other than no, an update request is inserted into the Search Manager Updates table for each Search Manager Host that should be notified about the modification of the Document.
- If web search is changed, update and/or delete requests are inserted into the Search Manager Updates table to appropriately update or delete the Document for each Search Manager Host based on what type of Search Manager the host is.
- If Metrics are enabled and the Document is a Metric, a new second screen comes up between the first screen and the Keywords screen.
- The new screen has five fields: Metric Resp. Official, Metric POC, Metric Organization, Metric Frequency and Reporting Lag Days.
- Below the five fields, will be a list of all the current Metric Types defined in the system. If a Metric Type has its "User Settable Type" field set to no, non-Admin users will not be able to change the value for that Type. If all Types are set to no, the Metric will be considered a Metric type of "Other" on the KPI NMIS dashboard.

### 4.6.3. Deleting a Document

Delete Document deletes a Document and all of its associated Generations, Comments, Reviews, and Review Discussions. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Delete Document privilege.
- The User must have Delete access to the Document.
- The Document cannot be reserved nor 'in-Review'.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Delete]*

#### **Step 1:**

The Document number to be deleted and the Document attributes are displayed.

1. Click the Next button to delete the Document or click the Cancel button to cancel the command.

#### **Step 2:**

Deleting this Document will delete all associated Generations, Comments, Reviews, and Review Discussions.

The Document number to be deleted and the Document attributes are displayed.

1. Enter the reason for deleting the Document in the Reason box. This is a required field. The maximum length of this field is 255 characters.

- Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Document and all associated Generations.

Notes:

- The Document record will be deleted.
- All Generation records associated with that Document will be deleted; this includes the PDF Renditions of a Document that are stored internally as "special" Generation records.
- All associations for access, commenters, distribution, and notification to the Document will be deleted.
- All Comments for the Document will be deleted.
- All subscriptions to Discussions for any Reviews for the Document will be deleted.
- All Discussions for any Reviews for the Document will be deleted.
- All Reviews for the Document will be deleted.
- A history record will be generated for the deletion of the Document.
- Email will be sent to the notification list associated with the Document and notification associated with the parent Folder/Cabinet that the Document was in before deletion.
- If web search is set to something other than none, a delete request is inserted into the Search Manager Updates table for each Search Manager Host that should be notified about the deletion of the Document.
- If there are any pending render requests, they are deleted.

#### 4.6.4. Showing a Document

Document Info shows the full details for a specific Document.

##### *A Specific Document*

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Show Info]*












The User must have read access to the Document.

Field Name	Description
<b>Parent Folder</b>	The Cabinet/Folder that this Document belongs to. Click on the link to go to the parent Folder.
<b>Number</b>	The number of this Document. Click on the link to go to the explore view of the Document which displays its Generations.
<b>Revision</b>	The latest revision of this Document. If the Document has not been released, this field will be blank.

<b>Title</b>	The title of this Document.
<b>Doc Type</b>	The Document Type of this Document.
<b>Doc Category</b>	The Document Category of this Document.
<b>In Review</b>	Yes - Document is in Review. No - Document is not in Review.
<b>Point of Contact</b>	The point of contact for this Document. Person responsible for the content of the Document.
<b>Organization</b>	The Organization that this Document belongs to.
<b>Owner</b>	The User that owns this Document. Click the owner's name link to display the User Info screen.
<b>Reserved By</b>	The User that currently has this Document reserved. If this Document is not reserved, this field will be blank.
<b>Resident Document</b>	Yes - The Document is resident, meaning that the Document is stored in TechDoc. No - The Document is not resident, meaning that TechDoc has information about the Document but it physically resides somewhere else. For example, a Document could be stored in a file cabinet or another computer system.
<b>Web Search</b>	No - Document attributes are not sent to Search Manager(s). Document is not searchable from the Search Manager(s). Document is searchable on the Document Manager. Community - Document is searchable via the web to anyone within the organization and selected partners IP addresses. Global - Document is available to anyone anywhere on the World Wide Web.
<b>Created</b>	The date and time the Document was created.
<b>Modified</b>	The date and time the Document was last modified.
<b>Released</b>	The date and time that this Document was last released.
<b>RMA Record</b>	Yes - One or more RMA Records currently exist for this Document. No - This Document does not have any RMA Records for it in the system.

## Metric Info

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Field Name	Description
<p><b>Metric Status</b></p>	<p>The current status of this Metric. Click the Metric status icon to display the Metric Info.</p> <p>A Metric status can be:</p> <ul style="list-style-type: none"> <li> Inactive</li> <li> Green - Improving</li> <li> Green - Staying Constant</li> <li> Green - Worsening</li> <li> Yellow - Improving</li> <li> Yellow - Staying Constant</li> <li> Yellow - Worsening</li> <li> Red - Improving</li> <li> Red - Staying Constant</li> <li> Red - Worsening</li> </ul> <p>A late Metric icon will be displayed as opaque. For example, </p> <p>Stoplight Criteria</p> <p>Green represents progress according to plan.</p> <p>Yellow represents an area of concern.</p> <p>Red represents a significant problem.</p>
<p><b>Metric Resp. Official</b></p>	<p>The official responsible for this Metric. Click on the link to send email to this Metric responsible official.</p>
<p><b>Metric POC</b></p>	<p>The point of contact for this Metric. Click on the link to send email to this Metric point of contact</p>
<p><b>Metric Organization</b></p>	<p>The Metric Organization responsible for this Metric.</p>
<p><b>Metric Frequency</b></p>	<p>The frequency with which a Metric is reported. For example: Monthly, Quarterly, Semiannually, Annually, and Biennially.</p>

<b>Reporting Lag Days</b>	The reporting lag days is the number of days it normally takes to prepare a Metric after the period being reported on ends.
<b>Metric Types</b>	The Metric Type this Metric is associated to. For example, BOA or Center-level. If this Metric is not associated to a Metric Type, Other is displayed.

### Keywords

Note: This help will only be displayed if this Document has any Keywords associated in the system.

The Keyword name and value will be displayed for each Keyword associated to the Document.

### Mail Info




Note: This help will only be displayed if this Document has any Mail Properties in the system. For instance, Documents created from emails.

The property name and value will be displayed for each Mail Property of the Document.

### Attachments

Note: This help will only be displayed if this Document has any Attachments.



The Attachment ID, File Name, Size and Description are displayed for Attachment.

- Click on  to View a specific Attachment.
- Click on  to Show Info of the specific Attachment.
- Click on  to Fetch the specific Attachment.

### RMA Records

Note: This help will only be displayed if this Document has any RMA Records in the system.

The RMA Record ID, Doc Number, Date Filed, Publication Date, Last Review Date, Next Review Date, and Retention Date will be displayed for each RMA Record of the Document.

- Click on  to View a specific RMA Record.
- Click on  to Show Info of the specific RMA Record.

### 4.6.5. Showing the Fetch Counts for a Document

Document Fetch Counts shows the number of the times a document has been fetched from the DM and each SM that the DM populates.

- The User must have Read access to the Document.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Show Fetch Counts]*

Document Fetch Counts displays the system name and fetch count for each place a document could be fetched from. This includes:

- The system name followed by (DM) if the system is a Document Manager or by (SM) if the system is a search manager.
- The times the document was fetched on the system for the specified date range. If a problem prevents a fetch count from being calculated at this time, the reason for the problem will be displayed instead of a count.

The Fetch Counts are displayed for the specified range or for all time if no start and end dates are specified. Note that Fetch Counting support was not added to TechDoc Search Managers until TechDoc 10. As a result, SM Fetch Counts will not include when documents were fetched on an SM prior to being upgraded to TechDoc 10. Also note that all SMs defined on the DM are listed even if the document is not currently searchable in a particular SM. TechDoc has no mechanism to determine whether or not a document was in an SM in the past so it always displays counts for all of them.

- To display Fetch Counts for a specific date. For example, to display Fetch Counts for 02/03/2019, enter 02/03/2019 to 02/03/2019 in the Date Range boxes. Use: mm/dd/yyyy.
- To display Fetch Counts for a range of dates. For example, to display Fetch Counts from 01/18/2019 to 01/23/2019, enter 01/18/2019 to 01/23/2019 in the Date Range boxes. Use: mm/dd/yyyy.
- To display Fetch Counts since a specific date. For example, to display Fetch Counts from 01/19/2019 to present date, enter 01/19/2019 in first Date Range box and leave the second Date Range box blank. Use: mm/dd/yyyy.
- To display Fetch Counts prior to a specific date. For example, to display all Fetch Counts prior to 01/23/2019, Leave the first Date Range box blank and enter 01/23/2019 in second Date Range box. Use: mm/dd/yyyy.
- To display all Fetch Counts, simply leave both Date Range boxes blank.

1. Enter the desired date(s) in the Date Range boxes.
2. Click the Clear Input button to clear the Date Range boxes or click the OK button to display the Fetch Counts for the document.

### 4.6.6. Showing the Links of a Document

Document Links shows URLs for different Document actions.

- The User must have Read access to the Document.

**Navigation:** [*DocMgr > Explorer > Select Desired Document > Side Menu > Show Links*]

Field Name	Description
<b>Fetch Latest Rev</b>	If the Document has been released, this URL will fetch the latest revision of the Document. If a rendered PDF exists, the PDF will be fetched. Otherwise, the native file will be fetched.
<b>Fetch Latest Gen</b>	Fetches the latest Generation of the Document.
<b>Explore Document</b>	Navigates to the location of the Document.
<b>Explore Parent Folder</b>	Navigates to the Folder containing the Document.
<b>Show Comments</b>	Displays all of the Comments for the Document.
<b>Add New Comment</b>	Navigates to the screen that allows a new Comment to be added.
<b>Show Status/Retrieval</b>	Displays the Document Status and Retrieval screen for the document.
<b>Show Current Review</b>	If the Document is currently in Review, this URL will display the info about that Review.

### 4.6.7. Showing a Metric












Metric Info displays the Metric metadata and all of the associated Generations for the specific Metric.

**Navigation:** [*DocMgr > Explorer > Select Desired Metric Document > Side Menu > Show Metric*]

Metric Info

Field Name	Description
<b>Parent Folder</b>	The Cabinet/Folder this Metric belongs to. Click on the link to go to the parent Folder.





<b>Number</b>	The number of this Metric. Click on the link to go to the explore view of the Metric.
<b>Revision</b>	The latest revision of this Metric. If the Metric has not been released, this field will be blank.
<b>Title</b>	The title of this Metric.
<b>Owner</b>	The user that owns this Metric. Click the owner's name link to display the User Info screen.
<b>Metric Status</b>	<p>The current status of this Metric.</p> <p>A Metric status can be:</p> <ul style="list-style-type: none"> <li> Inactive</li> <li> Green - Improving</li> <li> Green - Staying Constant</li> <li> Green - Worsening</li> <li> Yellow - Improving</li> <li> Yellow - Staying Constant</li> <li> Yellow - Worsening</li> <li> Red - Improving</li> <li> Red - Staying Constant</li> <li> Red - Worsening</li> </ul> <p>A late Metric icon will be displayed as opaque. For example, </p> <p>Stoplight Criteria</p> <p>Green represents progress according to plan.</p> <p>Yellow represents an area of concern.</p> <p>Red represents a significant problem.</p>
<b>Metric Resp. Official</b>	The official responsible for this Metric. Click on the link to send email to this Metric responsible official.
<b>Metric POC</b>	The point of contact for this Metric. Click on the link to send email to this Metric point of contact




<b>Metric Organization</b>	The Metric Organization responsible for this Metric.
<b>Metric Frequency</b>	The frequency with which a Metric is reported. For example: Monthly, Quarterly, Semiannually, Annually, and Biennially.
<b>Reporting Lag Days</b>	The reporting lag days is the number of days it normally takes to prepare a Metric after the period being reported on ends.
<b>Metric Types</b>	The Metric Type this Metric is associated to. For example, BOA or Center-level. If this Metric is not associated to a Metric Type, Other is displayed.


Generations

All Generations of the specific Metric will be displayed.

- Click on the file type icon to Explore Generation of the specific Metric.
- Click on  to Show Info of the specific Generation of the Metric.
- Click on  to Fetch This Generation of the specific Metric.
- The Metric Status icon is displayed for each released Generation.

A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant
-  Red - Worsening

A late metric icon will be displayed as opaque. For example, 

Stoplight Criteria

Green represents progress according to plan.

Yellow represents an area of concern.

Red represents a significant problem.

The Metric Date, Number and File Description are displayed for each Generation.

<b>Metric Date</b>	The Metric date for this Generation or blank if the Generation is inactive or not released.
<b>Number</b>	The Generation number and revision for this Generation. The revision will only be displayed if the Generation has been released.
<b>File Description</b>	The name of the file that was loaded into TechDoc, the date the file was loaded, and the size of the file.

#### 4.6.8. Showing the Status of a Document

Document Status shows the full details for a specific Document.

Click on DocMgr, right above Log In, to go to the Home Page of this Document Manager.

The URL of the Document Manager is displayed at the top of the screen. For example:  
DocMgr1.example.com

To log into this Document Manager, click on Log In. Logging into the Document Manager allows Users to create, modify, and release Documents. Note: Logging into this Document Manager requires a valid username and password.

For support on this system, click on Support.

<b>Field Name</b>	<b>Description</b>
<b>Number</b>	The number of this Document.
<b>Revision</b>	The latest revision of this Document. If the Document has not been released, this field will be blank.
<b>Title</b>	The title of this Document.
<b>Doc Type</b>	The Document Type of this Document.
<b>Organization</b>	The Organization that this Document belongs to.
<b>Point of Contact</b>	The point of contact for this Document. Person responsible for the content of the Document.
<b>Owner</b>	The User that owns this Document. Click the owner's name link to send email to the owner.

<b>Reserved By</b>	The User that currently has this Document reserved. If this Document is not reserved, this field will be blank.
<b>Created</b>	The date and time that this Document was created.
<b>Released</b>	The date and time that this Document was last released. This field will be blank if this Document has not been released.
<b>Review Status</b>	The current status and latest Generation of the Review. Click on the Vote link to vote on this Document. Note: To vote on this Document you must be a Review member on the current level of an active Review.

### Generations

All Generations of this Document are displayed along with any Renditions of released Generations. You must have Read access to the native Document and/or PDF in order to view it.

The following is displayed for each Generation:

<b>Generation</b>	Generation number. For example 1.0, 2.0, 3.0, etc. indicates a major Generation. When a Document is first created in TechDoc the Generation is 1.0. When the Document is replaced, the Generation would be 2.0. Minor Generations 1.1, 1.2 etc. indicate the Document was reserved and replaced during an online Review.
<b>Revision</b>	The revision name assigned to this Generation when it was released; for example, Basic, A, B, etc. If a Generation has not been released, this area will be blank.
<b>Create Date</b>	The date and time this Generation was created.
<b>Document Files</b>	click on the (doc, flo, xls, etc.) to open the native Document. click on the PDF (Portable Data Format) to view the Document in a PDF viewer. The PDF files have a watermark stamped on each page to let Users know that this is the released version of the Document. The watermark reads: "RELEASED - printed documents may be obsolete; validate prior to use". Note: If either the Document Type of the Document or the Mime Type of a Generation is not allowed to be rendered, there will not be a rendered PDF for that Generation. In addition, there will not be a rendered PDF for a Generation if the releaser has selected to not have the Generation rendered with a watermark when released.

### 4.6.9. Mass Canceling Documents

Mass Cancel Documents allows the Document Owner to mass cancel and release a group of Documents.

Note:

There are many different circumstances as to why Documents may be required to be Mass Canceled. Before Mass Canceling Documents, the Document owner needs to plan the process and the steps required to make the change.

**Navigation:** [*DocMgr > My Work > Side Menu > Mass Cancel Docs*]

#### **Step 1:**

To search for Documents to Mass Cancel, enter data in one or more search fields, adjust the search options if necessary, and press the Search button to submit the request. Pressing the Clear Input button will reset all of the search criteria.

Here are a few rules to remember when specifying search criteria:

- The search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and search criteria:

Field	Search Criteria
<b>Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Title</b>	Enter the Document title, or part of the Document title followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.




<b>Create Date</b>	<p>Search for Documents created on a specific date. For example, Documents created on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created for a range of dates. For example, Documents created from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created since a specific date. For example, Documents created from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents created prior to a specific date. For example, Documents created prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Point of Contact</b>	Enter the Document point of contact, or part of the Document point of contact followed by an asterisk.
<b>Reserved By</b>	Click on the down arrow and select the name from the list.
<b>Doc Type</b>	Click on the down arrow and select a Document Type from the list.
<b>Doc Category</b>	Click on the down arrow and select a Document Category from the list.
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>Read Access</b>	<p>Click on the down arrow and select Read access from the list.</p> <p>None - Documents do not have *Local Users (R), *Campus Users (R), *Community Users (R), or *Global Users (R) assigned with Read access.</p> <p>Local - Documents do have *Local Users (R) assigned with Read access.</p> <p>Campus - Documents do have *Campus Users (R) assigned with Read access.</p> <p>Community - Documents do have *Community Users (R) assigned with Read access.</p> <p>Global - Documents do have *Global Users (R) assigned with Read access.</p>
<b>Web Search</b>	Click on the down arrow and select web search from the list.
<b>Folder Path</b>	To search for Documents in a specific Folder enter the full Folder path and leave Include Subfolders unchecked. For example, entering the Folder path /z_USER/Demo without including subfolders would bring back all of the Documents in only the Demo Folder. This provides a means to Mass Cancel Documents in a single Folder; for example, to apply access to all Documents in a Folder. To cancel all of the

	Documents in the Demo Folder, subfolders of the Demo Folder, subfolders of those subfolders, etc, check Include Subfolders.
<b>New Keyword</b>	Click on the down arrow and select the Keyword from the list. Click the Add button. The Keyword will be added as a searchable field. If the Keyword is a free form field, for example Comments, enter Keyword, part of the Keyword followed by an asterisk, or just an asterisk. If the Keyword is a dropdown, you can select a specific value from the dropdown list or you can select the asterisk, which will return all the values for that specific Keyword. To remove the Keyword, click the Remove button.



1. To search for Documents to Mass Cancel, enter data in one or more search fields. Refer to the table above for help on searching.
2. Click the Cancel button to cancel the command, click the Search button to submit the request, or click the Clear Input button to reset all of the search criteria.





Step 2:

A listing of all of the Documents that matched the search criteria is displayed.











- If no Documents were found that matched the search criteria, the following message will be displayed: "No Documents found matching the specified search criteria."
- If the search criteria match too many Documents, the results are divided into multiple pages. To navigate these pages click the First link to jump to the first page of the search results, the Previous link to jump to the page before the current page, the Next link to jump to the page after the current page, and the Last link to jump to the last page of the search results.
- The Number and Title are displayed for each Document.
- The number of Documents that matched the search criteria is shown.
- The Documents are listed in alphabetical order by the Document number.
- Click on  to Explore Document (view all Generations) of the specific Document.
- Click on  to Show Info of the specific Document.
- Click on  to Fetch Latest Generation of the specific Document.

Note: Depending on the search results, one or more of the items listed below may not be displayed.

-  indicates that the specific Document is reserved.
-  indicates that the specified Document is in Review.

-  indicates that the specified Document is reserved and in Review.
-  indicates that the specified Document is cancelled.
- Click on  or  to Show Comments for the specific Document. This icon will not be available if there are no Comments for the Document.
- Click on the Metric status icon to display the Metric Info of the specific Document. Note: The Metric status icons will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant
-  Red - Worsening

A late Metric icon will be displayed as opaque. For example, 

### Stoplight Criteria

Green represents progress according to plan.

Yellow represents an area of concern.

Red represents a significant problem.






1. Click the Cancel button to cancel the command, click the Clear Input button to reset all of the search criteria, if you need to refine your search, enter data in another field and click the Search button, or click the Next button to continue.

### Step 3:

A listing of all of the Documents that matched the search criteria or a message stating, "There are too many Documents to allow individual selection" is displayed. If a list is displayed you must choose the Documents to be Mass Canceled by placing a check in the checkbox in front of



the Document number. You can check each Document individually or you can click the Select All button to select all the Documents. Only the Documents with a check in the checkbox will be Mass Canceled. If there are too many Documents to allow individual selection, all of the Documents will be selected for cancelation when you click Next.

- The Number and Title are displayed for each Document.
- The Documents are listed in alphabetical order by the Document number.
-  indicates that the specific Document is reserved.
-  indicates that the specified Document is in Review.
-  indicates that the specified Document is reserved and in Review.
- Click on  to Show Info of the specific Document.
-  indicates that the specified Document is cancelled.
- By default, an empty checkbox is displayed in front of each Document number.

Note:

Only Documents with a check in the checkbox in front of the Document number will be Mass Canceled.

1. Choose the Documents to be Mass Canceled by individually placing a check in the checkbox in front of the Document number or click the Select All button to select all of the Documents.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, click the Unselect All button to uncheck all previously checked Documents, click the Next button to continue.

Step 4:

- You must select a file to upload. The file uploaded will be used as the last generation of the Documents when canceling them.
1. At the File box click on the Browse... button to locate the file to be stored in the Document Manager.

Note: The File Upload box will be displayed.

2. In the Look in box select the drive/folder where the file to be stored in the Document Manager is located. To display all of the files in the folder, click on the down arrow and select All Files (\*.\*). Click on the file to be stored in the Document Manager. This will automatically insert the filename in the File name box. Click the Open button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Step 5:**

- A Revision must be selected from the list to be used as the last revision when the Documents are canceled. There is no difference between any of the values listed; any value chosen will indicate a Document is canceled. We provide multiple cancel values only as a convenience.
  - If rendering is enabled on the Document Manager and the mime type of the file uploaded supports rendering, you can check the box to render the file for each generation when releasing. If multiple Documents are selected, only Documents who's Doc Type allows rendering will be rendered.
1. Click the down arrow and select a Revision from the Revision list.
  2. If rendering is enabled and the file supports rendering, check the box to render the file when releasing each document. If rendering is not enabled or the file's mime type does not support rendering, a message will be displayed instead of the checkbox.
  3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Step 6:**

1. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Step 7:**

1. Enter the reason for Mass Canceling Documents in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to Mass Cancel the Documents.

**Notes:**

- A history record will be generated for the cancelation of each of the Documents.

#### **4.6.10. Mass Modifying Document Access**

Mass Modify Document Access modifies the access of one or more Documents in the Document Manager.

**Navigation:** *[DocMgr > My Work > Side Menu > Mass Modify Doc Access]*

**Step 1:**

To search for Documents to Mass Modify the access of, enter data in one or more search fields, adjust the search options if necessary, and press the Search button to submit the request. Pressing the Clear Input button will reset all of the search criteria.

Here are a few rules to remember when specifying search criteria:

- The search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and search criteria:

Field	Search Criteria
<b>Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Title</b>	Enter the Document title, or part of the Document title followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.
<b>Create Date</b>	<p>Search for Documents created on a specific date. For example, Documents created on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created for a range of dates. For example, Documents created from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created since a specific date. For example, Documents created from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents created prior to a specific date. For example, Documents created prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>




<b>Point of Contact</b>	Enter the Document point of contact, or part of the Document point of contact followed by an asterisk.
<b>Reserved By</b>	Click on the down arrow and select the name from the list.
<b>Doc Type</b>	Click on the down arrow and select a Document Type from the list.
<b>Doc Category</b>	Click on the down arrow and select a Document Category from the list.
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>Read Access</b>	<p>Click on the down arrow and select Read access from the list.</p> <p>None - Documents do not have *Local Users (R), *Campus Users (R), *Community Users (R), or *Global Users (R) assigned with Read Access.</p> <p>Local - Documents do have *Local Users (R) assigned with Read Access.</p> <p>Campus - Documents do have *Campus Users (R) assigned with Read Access.</p> <p>Community - Documents do have *Community Users (R) assigned with Read Access.</p> <p>Global - Documents do have *Global Users (R) assigned with Read Access.</p>
<b>Web Search</b>	Click on the down arrow and select web search from the list.
<b>Folder Path</b>	To search for Documents in a specific Folder enter the full Folder path and leave Include Subfolders unchecked. For example, entering the Folder path /z_ADMIN/Demo without including subfolders would bring back all of the Documents in only the Demo Folder. This provides a means to Mass Modify Documents in a single Folder; for example, to apply access to all Documents in a Folder. To modify all of the Documents in the Demo Folder, subfolders of the Demo Folder, subfolders of those subfolders, etc..., check Include Subfolders.
<b>New Keyword</b>	Click on the down arrow and select the Keyword from the list. Click the Add button. The Keyword will be added as a searchable field. If the Keyword is a free form field, for example Comments, enter Keyword, part of the Keyword followed by an asterisk, or just an asterisk. If the Keyword is a dropdown, you can select a specific value from the dropdown list or you can select the asterisk, which will return all the values for that specific Keyword. To remove the Keyword, click the Remove button.

1. To search for Documents to Mass Modify the access of, enter data in one or more search fields. Refer to the table above for help on searching.







- Click the Cancel button to cancel the command, click the Search button to submit the request, or click the Clear Input button to reset all of the search criteria.

### Step 2:




A listing of all of the Documents that matched the search criteria is displayed.

- If no Documents were found that matched the search criteria, the following message will be displayed: "No Documents found matching the specified search criteria."
- If the search criteria match too many Documents, the results are divided into multiple pages. To navigate these pages click the First link to jump to the first page of the search results, the Previous link to jump to the page before the current page, the Next link to jump to the page after the current page, and the Last link to jump to the last page of the search results.
- The Number and Title are displayed for each Document.
- The number of Documents that matched the search criteria is shown.
- The Documents are listed in alphabetical order by the Document number.
- Click on  to Explore Document (view all Generations) of the specific Document.
- Click on  to Show Info of the specific Document.
- Click on  to Fetch Latest Generation of the specific Document.

Note: Depending on the search results, the item listed below may not be displayed.

-  indicates that the specific Document is reserved.
-  indicates that the specified Document is in Review.
-  indicates that the specified Document is reserved and in Review.
-  indicates that the specified Document is cancelled.
- Click on  or  to Show Comments for the specific Document. This icon will not be available if there are no Comments for the Document.
- Click on the Metric status icon to display the Metric Info of the specific Document. Note: The Metric status icons will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant

-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant
-  Red - Worsening

A late Metric icon will be displayed as opaque. For example, 

### Stoplight Criteria

Green represents progress according to plan.





Yellow represents an area of concern.

Red represents a significant problem.

1. Click the Cancel button to cancel the command, click the Clear Input button to reset all of the search criteria, if you need to refine your search, enter data in another field and click the Search button, or click the Next button to continue.

### Step 3:

A listing of all of the Documents that matched the search criteria or a message stating, "There are too many Documents to allow individual selection" is displayed. If a list is displayed you must choose the Documents to modify the access of by placing a check in the checkbox in front of the Document number. You can check each Document individually or you can click the Select All button to select all the Documents. Note: Only the Documents with a check in the checkbox will be Mass Modified. If there are too many Documents to allow individual selection, all of the Documents will be selected for modification with you click Next.

- The Number and Title are displayed for each Document.
- The Documents are listed in alphabetical order by the Document number.
-  indicates that the specific Document is reserved.
-  indicates that the specified Document is in Review.
-  indicates that the specified Document is reserved and in Review.
- Click on  to Show Info of the specific Document.
- By default, an empty checkbox is displayed in front of each Document number.

**Note:**

Only Documents with a check in the checkbox in front of the Document number will be Mass Modified.

1. Choose the Documents to be Mass Modified by individually placing a check in the checkbox in front of the Document number or click the Select All button to select all of the Documents.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, click the Unselect All button to uncheck all previously checked Documents, click the Next button to continue.

**Step 4:**

Select the access action to perform on the selected Documents.

Access for a Group, User, or Remote User can either be added or removed.

**Note:**

1. Click on the down arrow and select the access action to perform.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

Select the Access and Group to Apply

Select the access and Group to associate to the selected Documents. If one or more of the Documents already has the Group associated, the association will be changed to match the access specified on this screen.

Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User on the Group can view the attributes of the Documents, view the attributes of the Documents' Generations and Renditions and fetch the Documents' Generations and Renditions.
<b>Modify</b>	A User on the Group can modify the attributes of the Documents and the Documents' Generations and Renditions. The User must also have the Modify Document privilege.
<b>Delete</b>	A User on the Group can Delete the Documents. The User must also have the Delete Document privilege.

<b>Reserve/Replace</b>	A User on the Group can reserve and replace the Documents. The User must also have the Create Generation privilege.
<b>Owner</b>	A User on the Group can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.

**Note:**

Checking None denies all levels of access, except for Read, to Users on the Group from accessing the Documents. Because a logged in User is always considered a part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Documents, the User will still get Read access to the Documents even though None prevents them from getting any other type of access.

If you specify None, the Users on this Group will have no access to the Documents even if the Users are on other Groups that are associated to these Documents. If a User on the Group is the Owner of the Documents, or an Admin, they will still have Owner access to the Documents.

1. Select one or more access settings by placing a check in the checkbox to left of the desired access setting.
2. Click the down arrow and select the Group to add the selected access to.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Enter the Remote User to Apply**

Enter the information for the Remote User to associate to the selected Documents. Remote Users can only be associated with Read access for fetching. If one or more of the Documents already has the Remote User associated, the association will not be changed for those Documents.

**Note:**

1. Click the down arrow and select a Remote Authenticator from the list.
2. Enter a username in the text field.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Select the Access and User to Apply**

Select the access and User to associate to the selected Documents. If one or more of the Documents already has the User associated, the association will be changed to match the access specified on this screen.



Definition of access is listed below:

Access	Definition of Access
<b>Read</b>	A User can view the attributes of the Documents, view the attributes of the Documents' Generations and Renditions and fetch the Documents' Generations and Renditions.
<b>Modify</b>	A User can modify the attributes of the Documents and the Documents' Generations and Renditions. The User must also have the Modify Document privilege.
<b>Delete</b>	A User can delete the Documents. The User must also have the Delete Document privilege.
<b>Reserve/Replace</b>	A User can reserve and replace the Documents. The User must also have the Create Generation privilege.
<b>Owner</b>	A User can act as the owner of the Documents. The User will be able to do anything to the Documents that the owner can, as long as the User's privileges allow it.

Note:

Checking None denies all levels of access, except for Read, to the User from accessing the Documents. Because a logged in User is always considered a part of the Local, Campus, Community, and Global groups, if one of these groups is associated to the Documents, the User will still get Read access to the Documents even though None prevents them from getting any other type of access.

If you specify None, the User will have no access to the Documents even if the User is on other Groups that are associated to the Documents. If the User is the Owner of the Documents, or an Admin, they will still have Owner access to the Documents.

1. Select one or more access settings by placing a check in the checkbox to left of the desired access setting.
2. Click the down arrow and select the User to add the selected access to.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

Select the Group to Remove Access for

Select a Group to remove from access to the Documents. If one or more of the Documents do not have the Group associated, then no change will be made for those Documents.

**Note:**

1. Click the down arrow and select the Group to remove all access for.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Select the Remote User to Remove Access for**

Select a Remote User to remove from access to the Documents. If one or more of the Documents do not have the Remote User associated, then no change will be made for those Documents.

**Note:**

1. Click the down arrow and select the Remote User to remove all access for.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Select the User To Remove Access For**

Select a User to remove from access to the Documents. If one or more of the Documents do not have the User associated, then no change will be made for those Documents.

**Note:**

1. Click the down arrow and select the User to remove all access for.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Step 6:**

The number of Document(s) selected on the Choose Documents to Mass Modify Access screen is shown.

1. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Step 7:**

The number of Document(s) selected on the Choose Documents to Mass Modify Access screen is shown.

1. Enter the reason for Mass Modifying the access of the Documents in the Reason box. This is a required field. The maximum length of this field is 255 characters.

2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to Mass Modify the access of all the Documents.

Notes:

- The access of multiple Documents that the current User selected will be modified.
- A history record will be generated for the access modification of each of the Documents.
- An email will be sent to the notification associated to each of the modified Documents.

#### 4.6.11. Mass Modifying Documents

Mass Modify Documents allows the Document Owner to make mass changes to Documents. The following attributes of the Document can be Mass Modified: Document Type, Document Category, Owner, Distribution for, Notification for, Point of Contact, Organization, Web Search, New Keyword, Access, Commenters, Distribution, and Notification.

Note:

There are many different circumstances as to why Documents may be required to be Mass Modified. Before Mass Modifying Documents, the Document owner needs to plan the process and the steps required to make the change; for example, when modifying the owner do you want to modify the owner and add the owner to the notification and/or distribution. Depending on your system your next step may be, leaving the Document where it is or move the Document to a new location using the move contents option.

If this system supports the Key Performance Indicator (KPI) Tool for NMIS metrics, Mass Modify Documents does not currently support changing Metric Documents into non-Metric Documents.

**Navigation:** *[DocMgr > My Work > Side Menu > Mass Modify Docs]*

##### **Step 1:**

To search for Documents to Mass Modify, enter data in one or more search fields, adjust the search options if necessary, and press the Search button to submit the request. Pressing the Clear Input button will reset all of the search criteria.

Here are a few rules to remember when specifying search criteria:

- The search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character

- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and search criteria:




Field	Search Criteria
<b>Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Title</b>	Enter the Document title, or part of the Document title followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list. Only an Admin can modify the owner of a Document.
<b>Create Date</b>	<p>Search for Documents created on a specific date. For example, Documents created on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created for a range of dates. For example, Documents created from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created since a specific date. For example, Documents created from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents created prior to a specific date. For example, Documents created prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Point of Contact</b>	Enter the Document point of contact, or part of the Document point of contact followed by an asterisk.
<b>Reserved By</b>	Click on the down arrow and select the name from the list.
<b>Doc Type</b>	Click on the down arrow and select a Document Type from the list. If this system supports the Key Performance Indicator (KPI) Tool for NMIS metrics, Mass Modify Documents does not currently support changing Metric Documents into non-Metric Documents.

<b>Doc Category</b>	Click on the down arrow and select a Document Category from the list.
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>Read Access</b>	Click on the down arrow and select Read access from the list. None - Documents do not have *Local Users (R), *Campus Users (R), *Community Users (R), or *Global Users (R) assigned with Read access. Local - Documents do have *Local Users (R) assigned with Read access. Campus - Documents do have *Campus Users (R) assigned with Read access. Community - Documents do have *Community Users (R) assigned with Read access. Global - Documents do have *Global Users (R) assigned with Read access.
<b>Web Search</b>	Click on the down arrow and select web search from the list.
<b>Folder Path</b>	To search for Documents in a specific Folder enter the full Folder path and leave Include Subfolders unchecked. For example, entering the Folder path /z_USER/Demo without including subfolders would bring back all of the Documents in only the Demo Folder. This provides a means to Mass Modify Documents in a single Folder; for example, to apply access to all Documents in a Folder. To modify all of the Documents in the Demo Folder, subfolders of the Demo Folder, subfolders of those subfolders, etc..., check Include Subfolders.
<b>New Keyword</b>	Click on the down arrow and select the Keyword from the list. Click the Add button. The Keyword will be added as a searchable field. If the Keyword is a free form field, for example Comments, enter Keyword, part of the Keyword followed by an asterisk, or just an asterisk. If the Keyword is a dropdown, you can select a specific value from the dropdown list or you can select the asterisk, which will return all the values for that specific Keyword. To remove the Keyword, click the Remove button.







1. To search for Documents to Mass Modify, enter data in one or more search fields. Refer to the table above for help on searching.
2. Click the Cancel button to cancel the command, click the Search button to submit the request, or click the Clear Input button to reset all of the search criteria.

Step 2:








A listing of all of the Documents that matched the search criteria is displayed.

- If no Documents were found that matched the search criteria, the following message will be displayed: "No Documents found matching the specified search criteria."
- If the search criteria match too many Documents, the results are divided into multiple pages. To navigate these pages click the First link to jump to the first page of the search results, the Previous link to jump to the page before the current page, the Next link to jump to the page after the current page, and the Last link to jump to the last page of the search results.
- The Number and Title are displayed for each Document.
- The number of Documents that matched the search criteria is shown.
- The Documents are listed in alphabetical order by the Document number.
- Click on  to Explore Document (view all Generations) of the specific Document.
- Click on  to Show Info of the specific Document.
- Click on  to Fetch Latest Generation of the specific Document.


Note: Depending on the search results, one or more of the items listed below may not be displayed.

-  indicates that the specific Document is reserved.
-  indicates that the specified Document is in Review.
-  indicates that the specified Document is reserved and in Review.
-  indicates that the specified Document is cancelled.
- Click on  or  to Show Comments for the specific Document. This icon will not be available if there are no Comments for the Document.
- Click on the Metric status icon to display the Metric Info of the specific Document. Note: The Metric status icons will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant

 Red - Worsening

A late Metric icon will be displayed as opaque. For example, 

## Stoplight Criteria

Green represents progress according to plan.





Yellow represents an area of concern.

Red represents a significant problem.

1. Click the Cancel button to cancel the command, click the Clear Input button to reset all of the search criteria, if you need to refine your search, enter data in another field and click the Search button, or click the Next button to continue.

## Step 3:

A listing of all of the Documents that matched the search criteria or a message stating, "There are too many Documents to allow individual selection" is displayed. If a list is displayed you must choose the Documents to be Mass Modified by placing a check in the checkbox in front of the Document number. You can check each Document individually or you can click the Select All button to select all the Documents. Only the Documents with a check in the checkbox will be Mass Modified. If there are too many Documents to allow individual selection, all of the Documents will be selected for modification with you click Next.

- The Number and Title are displayed for each Document.
- The Documents are listed in alphabetical order by the Document number.
-  indicates that the specific Document is reserved.
-  indicates that the specified Document is in Review.
-  indicates that the specified Document is reserved and in Review.
- Click on  to Show Info of the specific Document.
- By default, an empty checkbox is displayed in front of each Document number.

## Note:

Only Documents with a check in the checkbox in front of the Document number will be Mass Modified.

1. Choose the Documents to be Mass Modified by individually placing a check in the checkbox in front of the Document number or click the Select All button to select all of the Documents.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, click the Unselect All button to uncheck all previously checked Documents, click the Next button to continue.

Step 4:

- You must enter data in one or more of the fields to modify a Document.
  - The values you enter on this screen will apply to all the Documents that were selected on the Choose Documents to Mass Modify screen. You can select one or more fields to modify.
  - The number of Document(s) selected on the Choose Documents to Mass Modify screen is shown.
1. If applicable, modify the Document type in the Doc Type box by clicking on the down arrow and selecting it from the list. The new Document Type will be applied to all the Documents selected on the Choose Documents to Mass Modify screen. If this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics, Mass Modify Documents does not currently support changing Metric Documents into non-Metric Documents.
  2. If applicable, modify the Document Category in the Doc Category box by clicking on the down arrow and selecting it from the list. The new Document Category will be applied to all the Documents selected on the Choose Documents to Mass Modify screen.

Here are a few scenarios that might assist you in determining how to Mass Modify Documents.

- Change Owner - when you enter an owner in the Owner field but leave Distribution for Owner(s) and Notification for Owner(s) field blank, the new owner will be applied to all the Documents selected on the Choose Documents to Mass Modify screen but not be added to Distribution and Notification.
- Leave the Owner blank and select Add for Distribution for Owner(s) and Notification for Owner(s). The owners for the Documents that you selected on the Choose Documents to Mass Modify screen will be added to the Distribution and Notification. This provides the ability to add owners to Distribution and Notification without changing the owner of the Document.
- Leave the Owner blank and select Remove for Distribution for Owner(s) and Notification for Owner(s). The owners for the Documents that you selected on the Choose Documents to Mass Modify screen will be removed from the Distribution and Notification. This provides the ability to remove owners from Distribution and Notification without changing the owner of the Document.



3. If applicable, modify the Document owner in the Owner box by clicking on the down arrow and selecting a name from the list. The new owner will be applied to all the Documents selected on the Choose Documents to Mass Modify screen. Leave this box blank if you do not want to change the owner.
4. If applicable, modify the Distribution for Myself or Distribution for Owner(s) setting by clicking on the down arrow and selecting Add (add myself/the owner to the Distribution) or Remove (remove myself/the owner from the Distribution). You/the owner(s) will be added or removed for Distribution to all the Documents selected on the Choose Documents to Mass Modify screen. Leave this field blank, if you do not want to add or remove yourself/the owner(s) from Distribution. This provides the ability to add and/or remove yourself/owners to Distribution without changing the owner of the Documents.
5. If applicable, modify the Notification for Myself or Notification for Owner(s) setting by clicking on the down arrow and selecting Add (add myself/the owner to the Notification) or Remove (remove myself/the owner from the Notification). You/the owner(s) will be added or removed for Notification to all the Documents selected on the Choose Documents to Mass Modify screen. Leave this field blank, if you do not want to add or remove yourself/the owner(s) from Notification. This provides the ability to add and/or remove yourself/owners to Notification without changing the owner of the Documents.
6. If applicable, modify the Document point of contact in the Point of Contact box. The point of contact is the person responsible for the content of the Document. The maximum length of this field is 48 characters. The new point of contact will be applied to all the Documents selected on the Choose Documents to Mass Modify screen.
7. If applicable, modify the Document Organization in the Organization box by clicking on the down arrow and selecting an Organization from the list. The new Organization will be applied to all the Documents selected on the Choose Documents to Mass Modify screen.
8. If applicable, modify the web search in the Web Search box by clicking on the down arrow and selecting it from the list. The new web search will be applied to all the Documents selected on the Choose Documents to Mass Modify screen.

Here are a few scenarios that might assist you in determining how to Mass Modify Keywords.

- Modify Keyword - Select a Keyword in the New Keyword field on the Search form, and add that same Keyword on the Values form with a New value. The Keyword that matched the search criteria Keyword associated to the Documents selected on the Choose Documents to Mass Modify screen will be replaced with the new value.
- Modify Same Keyword with Multiple Values Using Wildcard - Select a Keyword in the New Keyword field on the Search form, and add that same Keyword on the Values form with a New value. When the same Keyword with multiple values is associated to Documents that matched the search criteria Keyword, then all values for that Keyword are deleted and replaced with the new value. For

example, on the Search form in the New Keyword field select Contract, click Add. In the Contract field enter ABC\*. This will return all Documents with the Keyword Contract with a value that starts with ABC. On the Value form in the New Keyword field select Contract, click Add and enter new value, i.e. xyz. Keywords associated to Documents with Contract=ABC\* will be replaced with the new value xyz.

- Delete Keyword - Select a Keyword in the New Keyword field on the Search form, and add that same Keyword on the Values form and NO value is specified. A warning message is displayed on the confirmation form stating that the Keyword will be deleted from the selected Document.
9. If applicable, add a new Keyword in the New Keyword box by clicking on the down arrow and selecting it from the list. Click the Add button and assign value for the Keyword. The new Keyword will be applied to all the Documents selected on the Choose Documents to Mass Modify screen. To remove the Keyword, click the Remove button.
  10. If applicable, in the Access box, enter a Document number to associate that Document's current associations for Access to all of the selected Documents. For example, entering the Document number XYZ will assign all access that is currently associated to Document XYZ to all of the Documents selected on the Choose Documents to Mass Modify screen.
    - Any access currently associated to the Documents selected on the Choose Documents to Mass Modify screen will be deleted and replaced with the access currently associated to Document XYZ.
    - If no access is currently associated to Document XYZ, then no access will be associated to the Documents selected on the Choose Documents to Mass Modify screen.
  11. If applicable, in the Commenters box, enter a Document number to associate that Document's current associations for Commenters to all of the selected Documents. For example, entering the Document number XYZ will assign all Commenters that are currently associated to Document XYZ to all of the Documents selected on the Choose Documents to Mass Modify screen.
    - Any Commenters currently associated to the Documents selected on the Choose Documents to Mass Modify screen will be deleted and replaced with the Commenters currently associated to Document XYZ.
    - If no Commenters are currently associated to Document XYZ, then no Commenters will be associated to the Documents selected on the Choose Documents to Mass Modify screen.
  12. If applicable, in the Distribution box, enter a Document number to associate that Document's current associations for Distribution to all of the selected Documents. For example, entering the Document number XYZ will assign all Distribution that is currently associated to Document XYZ to all of the Documents selected on the Choose Documents to Mass Modify screen.
    - Any Distribution currently associated to the Documents selected on the Choose Documents to Mass Modify screen will be deleted and replaced with the Distribution currently associated to Document XYZ.

- If no Distribution is currently associated to Document XYZ, then no Distribution will be associated to the Documents selected on the Choose Documents to Mass Modify screen.
13. If applicable, in the Notification box, enter a Document number to associate that Document's current associations for Notification to all of the selected Documents. For example, entering the Document number XYZ will assign all Notification that is currently associated to Document XYZ to all of the Documents selected on the Choose Documents to Mass Modify screen.
    - Any Notification currently associated to the Documents selected on the Choose Documents to Mass Modify screen will be replaced with the Notification currently associated to Document XYZ.
    - If no Notification is currently associated to Document XYZ, then no Notification will be associated to the Documents selected on the Choose Documents to Mass Modify screen.
  14. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 5:

1. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 6:

1. Enter the reason for Mass Modifying Documents in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to Mass Modify the Documents.

#### Notes:

- Any Documents selected for Mass Modify will not have their Document Category changed if the new Document Category has an Allow Stored Here value of 'No'. The following message will be displayed: "The Doc Category cannot be changed to the selected value because this Document manager is prohibited from storing Documents of this category."

#### Possible Messages

- If the Document Category is being modified and the web search is being modified to a value higher than is allowed by the new Document Category: "No Documents will have their web search setting changed because the new Doc Category's web search will not permit the new setting."

- If the Document Category is being modified, the access is being modified, and the new access has a Read access that is higher than is allowed by the new Document Category: "No Documents will have their Read access setting changed because the new Doc Category's read access won't permit the new setting."
- Any Documents selected for Mass Modify will not have their web search changed if their Document Category's highest allowed web search does not allow it. "x Documents will have their web search setting lowered because the new Doc Category's web search won't permit their current setting."
- Any Documents selected for Mass Modify will not have their Read access changed if their Document Category's highest Read access does not allow it. "x Documents will have their Read access setting lowered because the new Document Category's Read access will not permit their current setting."
- If the web search is being modified and some of the selected Documents' Document Category will not allow the new higher setting: "x Documents will not have their web search setting changed because their Doc web search won't permit the new setting."
- If the access is being modified and some of the selected Documents' Document Category will not allow the new higher setting: "x Documents will not have their Read access setting changed because their Document Category's Read access won't permit the new setting."
- Multiple Documents that the current User selected will be modified with the same changed attributes.
- A history record will be generated for modification of each of the Documents.
- Email will be sent to the notification associated with all the Documents showing all the Documents that were changed.

#### 4.6.12. Releasing a Document

Release Document releases a Document in the Document Manager. Releasing a Document means that the Document has been approved and is ready to be distributed.

- The User must have the Release privilege with Read access to the Document OR the User must have the Bypass privilege with Owner access to the Document. If a Document is in Review and it is 'Ready to Release', anyone with the Release privilege and Read access to the Document can release it. The second 'User must have the Bypass privilege with Owner access to the Document' option is not allowed when a Document is in Review.
- There must be at least one Generation for the Document that has not yet been released.
- The Document must not be reserved.
- The revision of the new release must not be the same as any other revision of the Document.
- The Document must not be in Review or be in Review and ready to be released.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Release]*

**Step 1:**

1. In the Generation box click on the down arrow and select the Generation to be released. The default is the latest unreleased Generation. The Generation field is display only and cannot be edited when releasing a Document that is in Review and ready to be released. When releasing a specific Generation, the Generation box will only list that Generation.
2. If the Document is not in Review, enter the revision of the Document in the Revision box. Revision is a required field. The maximum length of this field is 32 characters. Note: The revision field is display only and cannot be edited when releasing a Document that is in Review and ready to be released.
3. Enter the reason for releasing the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

Certain Document types or Mime Types may not allow the Document to be rendered. Therefore, "Render the watermarked PDF file" may or may not be displayed.

If "Render the watermarked PDF file" is displayed and the box is checked, a watermarked PDF file will be created. If you do not want the watermarked PDF file to be created, uncheck the box.











1. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to release the Document.

**Step 3:**

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

- An active Metric is required to have a Metric date.
  - An inactive Metric is not allowed to have a date.
1. In the Metric Status: box click on the down arrow and select the Metric status from the list. Note: You must choose a Metric status from the list. You cannot leave this drop down at Choose One.

The Metric Status Icons show the Key Performance Indicators. Each icon represents the trend direction and the spotlight color. A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant
-  Red - Worsening

A late Metric icon will be displayed as opaque. For example, 

### Stoplight Criteria

Green represents progress according to plan.

Yellow represents an area of concern.

Red represents a significant problem.

2. Enter the Metric date in the Metric Date box. The system takes the date entered in the Revision field and auto fills that date in the Metric date field. This only happens if the User enters a date in the revision field. This field can be modified. The Metric date is usually the reporting end date for the Metric. For example, if the Metric you are putting in is for how the project performed during the month of July, it is likely that the Metric Date would be 07/31/2004. An active Metric is required to have a Metric date. An inactive Metric is not allowed to have a date.

If "Render the watermarked PDF file" is displayed and the box is checked, a watermarked PDF file will be created.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to release the Document.

### Notes:

- The selected Generation is marked as released.
- A PDF Rendition of the released Generation will be created, if appropriate.
- A history record will be generated for the releasing of the Document.
- Email will be sent to the notification and distribution associated with the Document. If the Document is in Review, email is sent to the Review leader if they are not the current User releasing the Document and to any voters on the last level who have not voted.

- If the Document was in Review, the Review state will be changed to Complete, the end date will be set to the current date, and the in Review flag will be turned off on the Document.
- If Document is a Metric and the MetricRevisionFormat System Property has a value, a "Use: MMM-dd-yyyy" message will be displayed just to the right of the revision.
- Update requests are inserted into the Search Manager Updates table to appropriately update the Document for each Search Manager Host based on what type of Search Manager the host is and the web search value of the Document.

#### 4.6.13. Replacing a Document

After the Document has been updated, it is ready to be replaced in the Document Manager.

Each time a Document is replaced a new Generation of the Document is created. However, there is an option when replacing a Document that allows you to overwrite the last Generation. This option is not available if the last Generation is released, or if the Generation has been in Review.

When a Document in Review is successfully replaced, the new Generation has the same major Generation number as the previous Generation but the minor Generation number is incremented by 1. For example, if the previous Generation number was 3.0 the new Generation number will be 3.1.

- The Document must be reserved before it can be replaced.
- The specified Document must be reserved by the current User, or the current User must be an Admin.
- The User must have the Create Generation privilege.
- The User must have Reserve/Replace access to the Document.
- If overwriting, the User must also have the Delete Generation privilege and Delete access to the Document/Generation.
- If overwriting, the Document cannot be in Review.
- If overwriting, the Generation being overwritten cannot be released.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Replace]*

##### **Step 1:**

1. Enter the reason for replacing the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command or click the Next button to continue.

##### **Step 2:**

The upload process may take a few minutes depending on the size of the file being uploaded. Please be patient.

1. At the File box click on the Browse... button to locate the file to be stored in the Document Manager.

The File Upload box will be displayed.

2. In the File Upload box, select the drive/folder where the Document to be stored in the Document Manager is located. To display all of the files in the folder, in the Files of Type box, click on the down arrow and select All Files (\*.\*). Click on the file to be stored in the Document Manager. This will automatically insert the filename in the File Name box. Click the Open button.

Restricted Fetch Access allows you to add additional security to the Document.

3. In the Fetch Access box, leave this set to Normal unless you need to add additional security to the Document.

Fetch Access	Definition
<b>Normal</b>	Allows anyone within the selected domain Read access.
<b>Restricted</b>	Automatically removes Read Access from the Document. To fetch Document, Document owner must add users to access list and assign them Read Access, or if a password has been assigned to the Generation you must know the password. To add a password to a Generation see Modify Generation. For further assistance, contact the Help Desk.

4. To overwrite the last Generation, click in the box next to "Overwrite Generation #.#". This will place a check in the box. If you do not want to overwrite the last Generation, do not click on this box. This option is not available if the last Generation is released, or if the Generation has been in Review.
5. To keep the Document reserved after replacing it, click in the box next to "Keep Document reserved after replacing it". This will place a check in the box. If you do not want to leave the Document reserved, do not click on this box.
6. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to replace the Document.

Notes:

- The specified Document will be replaced.



- If the specified Document is nonresident, replacing it will cause it to become resident.
- If overwriting the last Generation, last Generation record and its physical file will be overwritten. If the last Generation is a minor Generation and it is being overwritten, then all minor Generations and their physical files will be overwritten with the single new Generation. Otherwise, a new Generation record and its physical file are added to the Document.
- If the file name has multiple adjacent periods in it, they will be replaced with a single period.
- The file will be stored encrypted if the Document's Document Category requires it; otherwise, it will be stored in its native format.
- If the Document is in Review, the current Generation number will be updated on the Review.
- A history record will be generated for the replacement of the Document as history of the Document and history of the active Review if there is one.
- Email will be sent to the notification associated with the Document. If the Document is in Review, email will be sent to the Review leader if he/she is not the current User, and any members of the current level.

#### 4.6.14. Reserving a Document

Retrieving a Document for modification is called Reserve. Reserve means that the Document is locked by the requester and cannot be modified by anyone else at that time. If two users try to Reserve a Document at the same time, the last User to make the request will receive an error message stating the Document is already Reserved.

- The specified Document must not already be Reserved.
- The User must have the Create Generation privilege.
- The User must have Reserve/Replace access to the Document.
- The User must have Read access to the last Generation.
- If the Document is in Review, the Review's setting must allow Reserve and Replace.
- If the Document is in Review, the current User must be of the allowed type of Review leader or Document owner to Reserve the Document.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Reserve]*

##### **Step 1:**

1. Enter the reason for Reserving the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the OK button to reserve the Document.

Notes:

- A history record will be generated for the reservation of the Document.
- Email will be sent to the notification associated with the Document. If the Document is in Review, email will be sent to the Review leader and any members of the current level.

#### 4.6.15. Unreleasing a Document

Unrelease will cancel a revision of the Document.

- The User must have the Release privilege with Read access to the Document OR the User must have the Bypass privilege with Owner access to the Document.
- The User can Unrelease any revision. (latest is default).
- The Document must not be reserved.
- The Generation that is being Unreleased must currently be Released.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Unrelease]*

##### **Step 1:**

1. In the Revision box click on the down arrow and select the revision to be Unreleased. The default is the latest revision. When unreleasing a specific Generation, the Revision box will only list the revision for that Generation.
2. Enter the reason for Unreleasing the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
3. Click the Cancel button to cancel the command, or click the OK button to release the Document.

##### Notes:

- Update requests are inserted into the Search Manager Updates table to appropriately update the Document for each Search Manager Host based on what type of Search Manager the host is and the web search value of the Document.
- Any pending Render Requests for the Generation are deleted.
- Any rendered Renditions for the Generation are deleted.
- A history record will be generated for Unrelease of the Document.
- Email notification will be sent to the Document notification list, Document distribution list, and Review leader of the completed Review for the selected Generation if the Review leader is not the current User.

#### 4.6.16. Unreserving a Document

The Document must be Reserved before it can be Unreserved. Unreserve is used to cancel the Reserve/lock on the Document.

- The User must have the Create Generation privilege.

- The User must have Reserve and Replace access to the Document.
- The specified Document must be Reserved.
- The User must be the User who Reserved the Document or an Admin.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Unreserve]*

**Step 1:**

1. Enter the reason for Unreserved the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the OK button to Unreserve the Document.

Notes:

- A history record will be generated for the Unreserving of the Document.
- E-mail will be sent to the notification associated with the Document.

## 4.7. Doc Categories

Each Document in TechDoc is assigned a Doc Category. This category usually refers to the security classification of the Document (ITAR/EAR, Trade Secret, Privileged/Proprietary, Commercial/Financial, Non-Sensitive, etc). TechDoc uses the Doc Category for multiple purposes. An Admin can define whether a particular Doc Category can even be stored on the Document Manager, and if it can be stored, whether to store it in its native format or in an encrypted format. The Admin can also specify whether or not a Document of this category should have its text sent to the search engine(s) upon release. Doc categories are also useful for reporting/searching purposes to find groups of Documents by classifications.

### 4.7.1. Doc Category Definitions

These are generally accepted Doc Category definitions. For additional information, contact your export control administrator.

#### Category Not Yet Assigned

- Waiting for a category to be assigned.
- Any Document with this designation should be assigned one of the categories below as soon as it can be determined.

#### Commercial/Financial

- Source evaluation information.

- Procurement sensitive information, such as vendor quotes (except vendor quotes as part of an electronic auction), attribution information or results, negotiating positions.
- Commercially licensed software restricted in accordance with the license or agreement under which it was obtained.
- Confidential financial data relating to contractors.

#### Export Administration Regulations (EAR)

"This document contains information whose dissemination to foreign persons is controlled by Export Administration Regulations (EAR), 15 CFR 730-774. This document may not be placed on a web site allowing uncontrolled access by the public. Transfer to foreign nationals in the U.S. or abroad or making access to it possible from a web site that allows access by the public requires a license from the Bureau of Industry and Security, U.S. Department of Commerce; or an exception under the EAR, 15 CFR Part 740. Violations of these regulations are punishable by fine, imprisonment, or both."

#### International Traffic in Arms Regulations (ITAR)

"This document contains information whose dissemination to foreign persons is controlled by International Traffic in Arms Regulations (ITAR), 22 CFR 120-130. This document may not be placed on a web site allowing uncontrolled access by the public. Transfer to foreign nationals in the U.S. or abroad or making access to it possible from a web site that allows access by the public requires a license from the Office of Defense Trade Controls, U.S. Department of State; or an exemption under the ITAR, 22 CFR Part 125.4, etc. Violations of these regulations are punishable by fine, imprisonment, or both."

#### Non-Sensitive Information

"Documents that are widely used by the organization in the performing their jobs and information that is public or could be made public. This category includes all provided information for use by the community, organization only or organization and contractors that is not otherwise categorized herein. It includes documents, which have already been made publicly available through the Document Availability Authorization or DAA process or the Defense Office of Freedom of Information and Security Review or DFOISR process. U.S. export regulations; i.e., the EAR and ITAR, refer to this as "Public domain" data."

#### Privileged/Proprietary

- Information disclosing inventions and technical innovations, including software, protected under 35 U.S.C. 205 and FOIA Exemption 3, unless release is approved by Center Patent Counsel.
- Trade secret information protected or prohibited from disclosure under the Trade Secrets Act (18 U.S.C 1905) or FOIA Exemption 4.
- Copyrighted materials unless approved for publication by the copyright owner.

- Other information determined non-releasable under FOIA.
- Most developed software (unless authorized)
- Personal information prohibited from disclosure by the Privacy Act or FOIA Exemption 6. This information includes, but is not limited to, Social Security numbers, home telephone numbers, home addresses, and medical data.
- Investigative information.

#### Trade Secrets

- Technical innovations prior to release approval by patent counsel.
- Invention disclosures.

## 4.8. Doc Comments

Doc Comments allow a Commenter the capability to add online Comments to a Document. The Commenter can add a text comment and/or add an attachment. The Commenter can choose which Generation to associate the Comments to. Each Comment is assigned a unique ID number to allow easy discussion of different Comments between Commenters and Document owners.

### 4.8.1. Adding Comments to a Document

Add Comments allows a commenter the capability to add online Comments to a Document. The commenter can add a text Comment and/or add an attachment. The commenter can choose which Generation to associate the Comments to. Each Comment is assigned a unique ID number to allow easy discussion of different Comments between commenters and Document owners.

Attachments are encrypted on the server just like generations when the Document category requires it.

Note: Commenters also have the capability to add Comments and/or an attachment by clicking on the link "When you are ready to make your text Comments and/or upload a file containing your Comments, use the following URL" in the Request for Comments email they received.

- The commenter must have Read access to the Document.
- The commenter must enter text in the Comment field and/or attach a Document.

**Navigation:** [*DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Side Menu > Add*]

#### **Step 1:**

To add a text Comment and/or add an attachment, perform the following steps:

1. In the Generation box, click on the down arrow and select the Generation you want to make Comments on. This box defaults to the latest Generation of the Document.
2. Enter the Comments in the Comment Text box. There is no length limit on the text Comments field.

and/or

3. To add an attachment at the Attachment box click on the Browse... button to locate the file to be stored in the Document Manager.

Note: The File Upload box will be displayed.

4. In the Look in box select the drive/folder where the document to be stored in the Document Manager is located. To display all of the files in a folder, in the Files of Type box, click on the down arrow and select All Files (\*.\*). Click on the file to be stored in the Document Manager. This will automatically insert the filename in the File name box. Click the Open button.

Note: If you add an attachment, clicking OK will begin a file upload process. This may take a few minutes depending on the size of the file being uploaded. Please be patient.

5. Click the OK button to add Comments to the Document.

Notes:

- The Document has its Comment flag set.
- If the Comment has an attachment, the attachment will be saved in the appropriate file area tree.
- A history record will be generated for the Document having a Comment added.
- Email will be sent to the notification associated with the Document.
- Even though this capability is primarily intended for commenters to Comment on a Document, Document owners are also allowed to add Comments as well.

#### **4.8.2. Closing a Comment**

Close Comment closes an open Comment in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental closure.

- The User must have Owner access to the Document that the Comment is attached to.

**Navigation:** [DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Select Desired Comment > Side Menu > Close]

**Step 1:**

The Comment to be closed and the Comment attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

Step 2:

The Comment to be closed and the Comment attributes are displayed.

1. Enter the reason for closing the Comment in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to close the Comment.

Notes:

- The Comment's Close Date will be set to the current date and time.
- The Comment's Closed By field will be set to the current User.
- The Comment will no longer be visible from the default show Comments screen.
- A history record will be generated for closure of the Comment.

### 4.8.3. Reopening a Comment

Reopen Comment reopens a closed Comment in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental reopening.

- The User must have Owner access to the Document that the Comment is attached to or be an Admin.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Select Desired Comment > Side Menu > Reopen]*

**Step 1:**

The Comment to be reopened and the Comment attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

Step 2:

The Comment to be reopened and the Comment attributes are displayed.

1. Enter the reason for reopening the Comment in the Reason box. This is a required field. The maximum length of this field is 255 characters.

2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to reopen the Comment.

Notes:

- The Comment will be reopened and have its close date cleared.
- A history record will be generated for the reopening of the Comment.
- Email will be sent to the commenters associated to the Document for the Comment.

#### 4.8.4. Requesting Comments on a Document

Request Comments allows the User the capability to request Comments on a Document.

When a request for Comments is made, an email message is sent to all commenters associated to the Document notifying them that their Comments are requested for this Document.

The email message contains the following links:

- Link to fetch latest Generation of the Document.
- Link to see Comments made to the Document.
- Link to make your text Comments and/or upload a file containing your Comments.
- Link to see more information about the Document.
  
- The current User must have Owner access to the Document.
- The Document must have at least one User or Group associated as commenters to the Document.

**Navigation:** [*DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Side Menu > Request*]

##### **Step 1:**

1. The Subject is initially filled in. The User has the capability to modify the subject. This is a required field. The maximum length of this field is 128 characters.
2. Enter any special instructions to the commenters in the Instructions box. This is a required field. The length of this field is unlimited. These instructions will be placed in the email message.
3. Click the Cancel button to cancel the command or click the OK button to send the request for Comments.

Notes:

- A history record will be generated for the request for Comments.
- Email will be sent out to all Users associated as commenters to the Document.



### 4.8.5. Showing Comments

The Comment and Comment attributes are displayed. Comments are displayed as a block of text and/or attachment. To view attachment, from the Comment side menu, click on Fetch or click on the link in the Attachment field.

#### ***A Specific Comment***

**Navigation:** [*DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Select Desired Comment*]







Field Name	Definition
<b>ID</b>	The unique ID number of the Comment.
<b>Doc Number</b>	Document number this Comment is associated to. Click on the Document number to see all Generations of this Document.
<b>Generation</b>	The Generation this Comment is associated to.
<b>Open Date</b>	The date and time this Comment was created.
<b>Commenter</b>	The User that created this Comment. Click the username to display the User Info screen.
<b>Close Date</b>	The date and time this Comment was closed. This field will be blank if the Comment is open.
<b>Closed By</b>	The User that closed this Comment. Click the username to display the User Info screen. This field will be blank if the Comment is open.
<b>Attachment</b>	The file name for this attachment when this attachment is fetched. The size of the uncompressed physical file associated with this attachment. Click on the link to open the attachment. None indicates no file was attached.
<b>File Path</b>	If the Comment has an attachment, the path where the physical file is stored is displayed. None indicates no file was attached. Only an Admin can view the file path of an attachment.
<b>Comment Text</b>	The text of the Comment, if Comment was added as a block of text. If Comment was added as an attachment only, the following message will be displayed: "No text, see attachment."

### All Comments for a Document

**Navigation:** [DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Side Menu > All Comments]

All Comments displays all the Comments for a specific Document.

The User must have Read access to the Document that the Comment(s) belong to.





- The ID, Open Date, Commenter, Document Number, Generation, and Close Date are displayed for each Comment.
- The number of Comments is shown.
- The Comments are listed in descending order by the ID.
- Click on  to View Comment.  indicates an open Comment.
- Click on  to View Comment.  indicates a closed Comment.
- Click on  to Show Info of the specific Comment.
- The text of the Comment is displayed. If a large block of text was added, click the More... link to display all of the Comment.
- If an attachment was added, click on the  to Fetch the Attachment. If an attachment was added and no text entered in the Comments box the following message will be displayed: "No text, see attachment."

### All Open Comments for a Document

**Navigation:** [DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Side Menu > Open Comments]

Open Comments displays all the open Comments for a specific Document.

The User must have Read access to the Document that the Comment(s) belong to.





- The ID, Open Date, Commenter, Document Number, Generation, and Close Date are displayed for each Comment.
- The number of Comments is shown.
- The Comments are listed in descending order by the ID.
- Click on  to View Comment.  indicates an open Comment.
- Click on  to Show Info of the specific Comment.
- The text of the Comment is displayed. If a large block of text was added, click the More... link to display all of the Comment.
- If an attachment was added, click on the  to Fetch the Attachment. If an attachment was added and no text entered in the Comments box the following message will be displayed: "No text, see attachment."

### All Closed Comments for a Document

**Navigation:** [DocMgr > Explorer > Select Desired Document > Side Menu > Comments > Side Menu > Closed Comments]

Closed Comments displays all the closed Comments for a specific Document.

The User must have Read access to the Document that the Comment(s) belong to.

- The ID, Open Date, Commenter, Document Number, Generation, and Close Date are displayed for each Comment.
- The number of Comments is shown.
- The Comments are listed in descending order by the ID.
- Click on  to View Comment.  indicates a closed Comment.
- Click on  to Show Info of the specific Comment.
- The text of the Comment is displayed. If a large block of text was added, click the More... link to display all of the Comment.
- If an attachment was added, click on  to Fetch the Attachment. If attachment was added and no text entered in the Comments box the following message will be displayed: "No text, see attachment."


## 4.9. Exploring

The Explorer is used to display and navigate through Cabinets, Folders, Documents, and Generations in TechDoc. In order to explore a Document, Folder, and so forth, the User must have Read access to it. For each item listed, the Explorer displays a few key points of information. When displaying Cabinets and Folders, the Explorer only displays the selected Cabinet or Folder, the Cabinets and/or Folders one level above, and one level below. Show Tree can be used to view an entire listing of all the Cabinets and Folders in the selected Cabinet or Folder.

### 4.9.1. Exploring

Clicking on Explore takes you to the explorer view of the current item that you have selected. The Explorer view is where the Folders and Documents are displayed; for example, if you were at the Document Info screen clicking on Explore would return you to the Document. If you are already in the Explorer view, clicking on Explore repaints the screen.

To Explore a Document, Generation, Folder, or Cabinet the User must have Read access to it. Everyone has Read access to root.

To view the detailed information for a Cabinet, Folder, Document, Generation or Rendition, click on  information icon.

In the Explorer view of the current item that you have selected the number of Cabinets, Folders, Documents or Generations are shown.

### 4.9.2. Showing a Tree

Show Tree displays the Folder/Cabinet tree starting with the specified Folder/Cabinet/Root.

- The User must have Read access to the Folder/Cabinet; everyone has Read access to root.

If a child Cabinet or Folder is encountered that the current User does not have Read access to, the Cabinet or Folder is displayed with the message "Not Allowed To View Contents" displayed below it. No more of the tree under that Cabinet or Folder will be displayed.

## 4.10. Fetching

blah, blah, blah

### 4.10.1. Fetching a Document or Attachment

Fetch is used to fetch a document's generation, discussion attachment, a document attachment, a document comment attachment, or a generation attachment. Fetch determines if the user has permission to fetch the requested file. If not, a 401 Unauthorized response is usually given to cause the user's browser to prompt for other credentials that might allow the operation to take place. Depending on the IP address of the user, the system may simply deny the request if prompting is not allowed for that location.

## 4.11. Folders

Folders are used to create structure and organize Documents within TechDoc.

### 4.11.1. Creating a Folder

Create Folder provides the capability for Users to create subfolders to better organize the Documents within their work area.

- The User must have the Create Folder privilege.
- The User must have Create Folder access to the parent Folder/Cabinet.
- The name of the new Folder cannot be the same as any other Folder under the same parent Folder/Cabinet.

**Navigation:** *[DocMgr > Explorer > Navigate to Desired Location > Side Menu > Create Folder]*

**Step 1:**

1. Enter the Folder name in the Name box. Folder names must be unique within the same parent Cabinet/Folder. Folder name is a required field. The maximum length of this field is 64 characters.
2. Enter the description of the Folder in the Description box. The maximum length of this field is 128 characters.
3. Enter the owner of the Folder in the Owner box by clicking on the down arrow and selecting the name from the list. Only an Admin can assign the owner of a Folder.
4. By default, you will automatically be added to the notification list of this Folder. If you do not want to be added to the notification list, uncheck the box next to "Check to add myself/owner to the notification list".
5. By default, your Organization is entered in the Organization box. If you need to change the Organization, click on the down arrow and select it from the list. The Organization selected is the Organization the Folder will belong to.
6. If the Documents created in this Folder should have RMA Records generated for them automatically, select an RMA File Plan in the RMA File Plan box by clicking the down arrow and selecting a file plan from the list. If automatic records are not desired, leave this box blank.
7. Enter the reason for creating this Folder in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
8. Click the Cancel button to cancel the command, or click the OK button to create the Folder.

**Notes:**

- If "Check to add myself/owner to the notification list" is checked, then you/the owner will be added to the notification list.
- A history record will be generated for creation of the Folder.
- Email will be sent to the notification associated with the parent Folder/Cabinet and to you/the owner if "Check to add myself to the notification list" or "Check to add owner to the notification list" was checked.
- The Folder will have the access specified by the DefaultFolderReadAccess System Property if access is not updated at the time the Folder is created.

**4.11.2. Modifying a Folder**

Modify Folder provides the capability for Users to modify the attributes of a Folder.

- The User must have the Modify Folder privilege.
- The User must have Modify access to the Folder.
- Only the Document Administrator can change the owner of the Folder.
- The name of the specified Folder cannot be changed to a name being used by another Folder in the same parent Folder/Cabinet.

**Navigation:** *[DocMgr > Explorer > Selected Desired Folder > Side Menu > Modify]*

**Step 1:**

1. If applicable, modify the Folder name in the Name box. Folder names must be unique within the same parent Cabinet/Folder. Folder name is a required field. The maximum length of this field is 64 characters.
2. If applicable, modify the description of the Folder in the Description box. The maximum length of this field is 128 characters.
3. If applicable, modify the owner of the Folder in the Owner box by clicking on the down arrow and selecting the name from the list.
4. If applicable, modify if the owner of Folder should be added to the notification list. Check the box next to "Check to add owner to the notification list" to add the owner of the Folder to the notification list. Leave the box blank if owner does not need to be added to the notification list.
5. If applicable, modify the Folder Organization in the Organization box by clicking on the down arrow and selecting it from the list. The Organization selected is the Organization the Folder will belong to.
6. Enter the reason for modifying this Folder in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
7. Click the Cancel button to cancel the command, or click the OK button to modify the Folder.

Notes:

- If the current User is an Admin:
  - If the owner has been changed, then any private Groups for the previous owner will be removed from the access and notification lists for this Folder.
  - If "Check to add owner to the notification list" is checked and the owner is not already on the notification list then they will be added.
- A history record will be generated for modification of the Folder.
- E-mail will be sent to the notification associated with the modified Folder.

### 4.11.3. Deleting a Folder

Delete Folder deletes a Folder in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Delete Folder privilege.
- The User must have Delete access to the Folder.
- The specified Folder cannot be deleted if it contains any Documents.
- The specified Folder can contain child Folders, which may also contain child Folders, etc.
- If the specified Folder contains child Folders:
  - The User must have Delete access to each and every child Folder.

- None of the child Folders can contain any Documents.

**Navigation:** [DocMgr > Explorer > Selected Desired Folder > Side Menu > Delete]

**Step 1:**

The Folder to be deleted and the Folder attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Folder to be deleted and the Folder attributes are displayed.

1. Enter the reason for deleting the Folder in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Folder.

**Notes:**

- All associations for access and notification to the Folder and any child Folders will be deleted.
- History records will be generated for deletion of the Folder and any child Folders.
- E-mail will be sent to the notification associated with the Folder, notification associated with the child Folders (if any), and notification associated with the parent Folder/Cabinet that the Folder was in before deletion.

#### 4.11.4. Showing a Folder

Folder Info displays the full details for a specific Folder.

**Navigation:** [DocMgr > Explorer > Select Desired Folder > Side Menu > Show Info]

##### **A Specific Folder**

The User must have Read access to the Folder.

Field Name	Description
Parent	The Cabinet/Folder that this Folder belongs to. Click the link to go to the parent Cabinet/Folder.
Name	The name of this Folder.

<b>Description</b>	The description of this Folder.
<b>Owner</b>	The User that owns this Folder. Click the owner's name link to display the User Info screen.
<b>Organization</b>	The Organization that this Folder belongs to.
<b>RMA File Plan</b>	The RMA File Plan set on this Folder if the automatic records feature is being used. If an RMA File Plan and RMA Record Set are set on this Folder, any Document created in this Folder will also have an RMA Record created for it using the RMA File Plan and placed in the RMA Record Set.
<b>RMA Record Set</b>	The RMA Record Set used by this Folder if the automatic records feature is being used. If an RMA File Plan and RMA Record Set are set on this Folder, any Document created in this Folder will also have an RMA Record created for it using the RMA File Plan and placed in the RMA Record Set.
<b>Created</b>	The date and time this Folder was created.
<b>Modified</b>	The date and time this Folder was last modified.

#### 4.11.5. Moving the Contents of a Folder or Cabinet

Move Contents allows a User the capability to move Folders and Documents from a source Folder/Cabinet to a destination Folder/Cabinet. The User must have appropriate access to the Folder/Cabinet the Folders and Documents reside in. The User must have appropriate access to where the Folders and Documents that are being moved, and the User must have appropriate access to the Folder/Cabinet where the Folders and Documents are being moved to.

- If the User is moving documents...
  - The User must have the Modify Document privilege.
  - The User must have Modify access to each document that is being moved.
  - The User must have Create Document access to the destination Folder/Cabinet.
- If the User is moving folders...
  - The User must have the Modify Folder privilege.
  - The User must have Modify access to each folder that is being moved.
  - The User must have Create Folder access to the destination Folder/Cabinet.

**Navigation:** [*DocMgr > Explorer > Select Desired Folder or Cabinet > Side Menu > Move Contents*]

**Step 1:**



1. Enter the reason for moving the Folders and/or Documents in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command or click the Next button to continue.

### Step 2:

User must have appropriate access to the contents that are being moved.

The Name/Number and Description/Title are displayed for each Folder and/or Document.

Note: If the Document is reserved or in review the icons below will be displayed.



indicates that the specific Document is reserved.



indicates that the specified Document is in review.






indicates that the specified Document is reserved and in review.

1. Select the contents to be moved by clicking in the box, in the Move column, in front of each Folder and/or Document to be moved. This will place a check in the box. You can check each Document and/or Folder individually or you can click the Select All button to select all the Documents and/or Folders. Only the Documents and/or Folders with a check in the box will be moved.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, click the Select All button to select all the Documents and/or Folders, click the Unselect All button to uncheck all previously checked Documents and/or Folders, click the Next button to continue.

### Step 3:

User must have appropriate access to where the contents are being moved.

- The contents cannot be moved to root.
- The contents cannot be moved if the source and destination Folders/Cabinets are the same.
- The contents cannot be moved to a Folder that is also being moved.
- A Folder cannot be moved to any of its own descendent Folders.
- A Folder cannot be moved to a Folder/Cabinet that has a subfolder with the same name already in it.

1. Navigate to the destination Folder or Cabinet where the contents are being moved to, by clicking on the appropriate , , or  icons just like navigating the Folder tree in the Explorer.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to move contents.

#### Notes:

- A history record will be generated for the movement of each Folder and Document being moved.
- E-mail will be sent to the notification associated with the source Folder/Cabinet, the notification associated with the destination Folder/Cabinet, the notification associated with each Folder being moved, and the notification associated with each Document being moved.

## 4.12. Folder Shares

Folder Shares add the ability for non-TechDoc users to view a Folder tree and fetch Documents from the web without the need to build a website. However, if needed on a web page, the Folder tree can be easily included in a frame on the web page. A Folder Share when viewed on the web looks very much the same as it does in TechDoc displaying only Cabinets, Folders, and Documents without any other menu bars or side menus.

### 4.12.1. Creating a Folder Share

Create Folder Share creates a new Folder Share in the Document Manager. Folder Shares are used to allow Users on the web to view a Folder of your Documents without having to log in to TechDoc. Folder Shares provide a convenient way to allow Remote Users to view a group of related Documents without the need for you to create a custom web page. For example, you could create a Folder for a working group that you belong to, then you could create a sub Folder for each month, and then you could place each month's Documents (meeting minutes, notifications, reports, etc) in its Folder. Now you can send out the URL for your Folder Share and each User can use it to navigate to the different months and download the Documents they are looking for.

It is important to note that Users can see the Documents that are in the Folder Share, but each Document still controls what access the User must have in order to fetch the Document. In other words, just because the User can see the Documents in the share, it does not mean they can fetch the Documents.

- The User must have Owner access to the Folder for this share.
- The Folder Share name cannot be the same as any other Folder Share in the system.

**Navigation:** [DocMgr > Explorer > Select Desired Folder > Side Menu > Shares > Side Menu > Create]

**Step 1:**

1. Enter the Folder Share name in the Name box. The Folder Share name must be unique within the same Document Manager. Name is a required field. The maximum length of this field is 255 characters.
2. Enter the description of the Folder Share in the Description box. The maximum length of this field is 255 characters.
3. Enter the Read access of the Folder Share in the Read Access box by clicking on the down arrow and selecting if from the list.

Read Access	Definition
Campus	Campus network addresses can view this Folder Share.
Community	Community network addresses can view this Folder Share.
Global	Any network address that can reach the server can view this Folder Share.

4. Enter the reason for creating the Folder Share in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
5. Click the Cancel button to cancel the command, or click the OK button to create the Folder Share.

Notes:

- A new Folder Share record will be created.
- A history record will be generated for creation of the Folder Share.

#### 4.12.2. Modifying a Folder Share

Modify Folder Share modifies a Folder Share in the Document Manager. Folder Shares are used to allow Users on the web to view a Folder of your Documents without having to log in to TechDoc. Folder Shares provide a convenient way to allow Remote Users to view a group of related Documents without the need for you to create a custom web page. For example, you could create a Folder for a working group that you belong to, then you could create a sub Folder for each month, and then you could place each month's Documents (meeting minutes, notifications, reports, etc) in its Folder. Now you can send out the URL for your Folder Share and each User can use it to navigate to the different months and download the Documents they are looking for.

It is important to note that Users can see the Documents that are in the Folder Share, but each Document still controls what access the User must have in order to fetch the Document. In other words, just because the User can see the Documents in the share, it does not mean they can fetch the Documents.

- The User must have Owner access to the Folder Share.
- The Folder Share name cannot be the same as any other Folder Share in the system.

**Navigation:** [DocMgr > Explorer > Select Desired Folder > Side Menu > Shares > Select Desired Folder Share > Side Menu > Modify]

**Step 1:**

1. If applicable, modify the Folder Share name in the Name box. Folder share name must be unique within the same Document Manager. Name is a required field. The maximum length of this field is 255 characters.
2. If applicable, modify the Folder Share description in the Description box. The maximum length of this field is 255 characters.
3. If applicable, modify the Folder Share Read access in the Read Access box if needed.

Read Access	Definition
<b>Campus</b>	Campus network addresses can view this Folder Share.
<b>Community</b>	Community network addresses can view this Folder Share.
<b>Global</b>	Any network address that can reach the server can view this Folder Share.

4. Enter the reason for modifying the Folder Share in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
5. Click the Cancel button to cancel the command, or click the OK button to modify the Folder Share.

Notes:

- The Folder Share record will be modified.
- A history record will be generated for modifying the Folder Share.

### 4.12.3. Deleting a Folder Share

Delete Folder Share deletes an existing Folder Share in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have Owner access to the Folder Share.

**Navigation:** [DocMgr > Explorer > Select Desired Folder > Side Menu > Shares > Select Desired Folder Share > Side Menu > Delete]

**Step 1:**

The Folder Share to be deleted and the Folder Share attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Folder Share to be deleted and the Folder Share attributes are displayed.

1. Enter the reason for deleting the Folder Share in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Folder Share.

**Notes:**


- The Folder Share record will be deleted.
- A history record will be generated for deletion of the Folder Share.

#### 4.12.4. Showing Folder Shares

Show Folder Shares displays all the Folder Shares that have been created in the Document Manager. Only an Administrator can show all of the Folder Shares. If no Folder Shares have been created on the Document Manager yet, the following message will be displayed: "There aren't any Folder Shares in the system."

**All Folder Shares**

**Navigation:** [DocMgr > Admin > Miscellaneous > Folder Shares]

- The Name and Description are displayed for each Folder Share.
- The number of Folder Shares is shown.
- Click on  to Show Info for the specific Folder Share.

**A Specific Folder Share**

**Navigation:** [DocMgr > Explorer > Select Desired Folder > Side Menu > Shares > Select Desired Folder Share]

Folder Share Info displays the full details for a specific Folder Share.


Field Name	Description
<b>Parent Folder</b>	The path of the Folder being shared. Click the parent Folder link to go to the Folder.
<b>Name</b>	The name of this Folder Share.
<b>Description</b>	The description of this Folder Share.
<b>Read Access</b>	<p>Campus - Campus Network Addresses can view this Folder Share.</p> <p>Community - Community Network Addresses can view this Folder Share.</p> <p>Global - Any Network Address that can reach the server can view this Folder Share.</p>
<b>View Share Link:</b>	The URL where this Folder Share can be viewed.

All Folder Shares of a Folder

**Navigation:** [\[DocMgr > Explorer > Select Desired Folder > Side Menu > Shares\]](#)

All Folder Shares displays all the Folder Shares for the selected Folder.


If no Folder Shares have been created on the selected Folder yet, the following message will be displayed: "There aren't any shares for this Folder."

- The Name and Description are displayed for each Folder Share.
- The number of Folder Shares is shown.
- Click on  to Show Info for the specific Folder Share.

All Folder Shares You Own

**Navigation:** [\[DocMgr > My Work > Side Menu > Folder Shares\]](#)

My Folder Shares displays all the Folder Shares on Folders that you own. If there are not any shares on the Folders that you own, the following message will be displayed: "You don't have any Folder Shares."

- The Name and Description are displayed for each Folder Share.
- The number of Folder Shares is shown.
- Click on  to Show Info for the specific Folder Share.

### 4.12.5. Viewing a Folder Share

**Navigation:** *[DocMgr > My Work > Side Menu > Folder Shares > Select Desired Folder Share > Click View Share Link]*

View Share displays an Explorer view for Folder Shares. Folder shares are used to allow Users on the web to view a Folder of your Documents without having to log in to TechDoc. Folder shares provide a convenient way to allow Remote Users to view a group of related Documents without the need for you to create a custom web page. For example, you could create a Folder for a working group that you belong to, then you could create a sub Folder for each month, and then you could place each month's Documents (meeting minutes, notifications, reports, etc) in its Folder. Now you can send out the URL for your Folder Share and each User can use it to navigate to the different months and download the Documents they are looking for.

It is important to note that Users can see the Documents that are in the Folder Share, but each Document still controls what access the User must have in order to fetch the Document. In other words, just because the User can see the Documents in the Share, it does not mean they can fetch the Documents.

You can click on the Folders to navigate up and down the Folder Share. Once you navigate to the Folder you are looking for, you can click on a Document to see the available Generations. Then you can click on the Generation to fetch it provided that you have access to do so.

## 4.13. Forms

Electronic Forms are used to capture data just like traditional paper forms do. However, they offer the advantage of being fully searchable and exportable to a variety of formats. An electronic form can be designed to replicate the layout of the original paper form while adding security and data validation to the data collection process. Additionally, the DocuBrain Form format is a simple, human-readable XML document.

### 4.13.1. Forms Management

**Navigation:** *[DocMgr > Forms]*

A User with the Forms Manager or Admin privilege will have access to all of the Forms Management functions. A User with the Forms privilege will only have access to their Forms.

### 4.13.2. Publishing a Form

Publish Form is used to publish a generation as an electronic form in the document manager. The file of the generation must be an XML file built using the DocuBrain TechDoc Electronic

Form XML Format. After publishing the generation as a form, the form can be viewed under the Forms area in the document manager where it can be further configured if necessary.

- The User must have the Forms or Forms Manager privilege.

**Navigation:** *[DocMgr > Explorer > Select Desired Generation > Side Menu > Publish As Form]*

**Step 1:**

1. Enter a name for the Form in the Name box. The Form name must be unique within the same Document Manager. Name is a required field. The maximum length of this field is 255 characters.
2. Enter the description of the Form in the Description box. The maximum length of this field is 255 characters.
3. In the Available box, click the down arrow, and select Yes (form will be available and accept form submissions) or select No (form will not be yet available to accept form submissions). This setting allows you to toggle whether or not the form will accept submissions. This setting must be Yes to begin accepting submissions even if an Available Start Date is specified.
4. If needed, enter the date the Form should become available in the Available Start Date box. Use the first box for the date and the second box for the time. If Available Start Date and/or Available End Date are left empty, the Form will be available to submit as long as Available is 'Yes' and the Max Submissions have not been reached.
5. If needed, enter the date the Form should no longer be available in the Available End Date box. Use the first box for the date and the second box for the time. If Available Start Date and/or Available End Date are left empty, the Form will be available to submit as long as Available is 'Yes' and the Max Submissions have not been reached.
6. In the Days To Complete box, enter the number of days a user has to complete a submission once they've started one. By default, this field is 0 meaning the user must complete the form once they've started and saving/resuming a form submission is not allowed. Otherwise, this number indicates that the user may take X number of days to complete the submission. Additionally, this also enables the user to save progress and resume a submission at a later time if they are unable to complete it in a single sitting.
7. In the Max Submissions box, enter the maximum number of submissions this form should allow or 0 if the form should allow an infinite number of submissions.
8. Enter the reason for publishing the Form in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the OK button to publish the Form.

**Notes:**

- A new Form record will be created.
- A history record will be generated for publishing of the Form.



### 4.13.3. Modifying a Form

Modify Form modifies an existing Form in the Document Manager.

- The User must have Owner access to the Form.
- The Form name cannot be the same as any other Form in the system.

**Navigation:** [*DocMgr > Forms > Select Desired Forms > Side Menu > Modify*]

#### **Step 1:**

1. If applicable, modify the Form name in the Name box. Form name must be unique within the same Document Manager. Name is a required field. The maximum length of this field is 255 characters.
2. If applicable, modify the Form description in the Description box. The maximum length of this field is 255 characters.
3. If applicable, modify the Availability setting by clicking the down arrow, and selecting Yes (form will be available and accept form submissions) or No (form will not be yet available to accept form submissions). This setting allows you to toggle whether or not the form will accept submissions. This setting must be Yes to begin accepting submissions even if an Available Start Date is specified.
4. If applicable, modify the date the Form should become available in the Available Start Date box. Use the first box for the date and the second box for the time. If Available Start Date and/or Available End Date are left empty, the Form will be available to submit as long as Available is 'Yes' and the Max Submissions have not been reached.
5. If applicable, modify the date the Form should no longer be available in the Available End Date box. Use the first box for the date and the second box for the time. If Available Start Date and/or Available End Date are left empty, the Form will be available to submit as long as Available is 'Yes' and the Max Submissions have not been reached.
6. If applicable, In the Days To Complete box, modify the number of days a user has to complete a submission once they've started one. By default, this field is 0 meaning the user must complete the form once they've started and saving/resuming a form submission is not allowed. Otherwise, this number indicates the that the user may take X number of days to complete the submission. Additionally, this also enables the user to save progress and resume a submission at a later time if they are unable to complete it in a single sitting.
7. If applicable, In the Max Submissions box, modify the maximum number of submissions this form should allow or 0 if the form should allow an infinite number of submissions.
8. Enter the reason for modifying the Form in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the OK button to modify the Form.

Notes:

- The Form record will be modified.
- A history record will be generated for modifying the Form.

#### 4.13.4. Deleting a Form

Delete Form deletes an existing Form in the Document Manager.

- The User must have the Forms privilege.
- The User must have Delete access to the Form. Delete access is determined by the User being a Document Administrator or the actual owner of the Form.

**Navigation:** *[DocMgr > Forms > Select Desired Form > Side Menu > Delete]*

##### **Step 1:**

The Form to be deleted and the Form attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to delete the Form.

##### **Step 2:**

The Form to be deleted and the Form attributes are displayed.

1. Enter a reason for deleting the Form in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Form.

Notes:

- The Form record will be deleted.
- All Form Submissions of the Form will be deleted.
- A history record will be generated for deletion of the Form.

#### 4.13.5. Showing a Form



Show Form displays the details for multiple Forms or a specific Form.

##### **All Forms**

**Navigation:** *[DocMgr > Forms > Side Menu > All Forms]*

All Forms displays all the Forms that has been created in the Document Manager.

Only the Document Administrator can show All Forms.

- The Name, Availability, and Description are displayed for each Form.
- The number of Forms is shown.
- The Forms are displayed in alphabetical order by name.
- Click on  to View a specific Form.
- Click on  to Show Info for the specific Form.



### My Forms

**Navigation:** [DocMgr > Forms > Side Menu > My Forms]

My Forms displays all the Forms that you are currently the owner of in the Document Manager. If you have Owner access to a Form but are not the actual owner of the Form, it will not be displayed here.

The User must have the Forms privilege.

If you have not created a Form in the Document Manager, the following message will be displayed: "You don't have any Forms."

- The Name, Availability, and Description are displayed for each Form.
- The number of Forms is shown.
- The Forms are displayed in alphabetical order by name.
- Click on  to View a specific Form.
- Click on  to Show Info for the specific Form.

### Owner Forms



**Navigation:** [DocMgr > Forms > Side Menu > Owner Forms]

Owner Forms displays all the Forms in the Document Manager that you have Owner access to. If you are the actual owner of a Form, it will not be displayed here.

The User must have the Forms privilege.

If you have not been associated for Owner access to any Form in the Document Manager, the following message will be displayed: "You don't have Owner access to any Forms."

- The Name, Availability, and Description are displayed for each Form.
- The number of Forms is shown.
- The Forms are displayed in alphabetical order by name.

- Click on  to View a specific Form.
- Click on  to Show Info for the specific Form.



Submitter Forms

**Navigation:** [DocMgr > Forms > Side Menu > Submitter Forms]

Submitter Forms displays all the Forms in the Document Manager that you have Form Submitter access to.

The User must have the Forms privilege.

If you have not been associated for Form Submitter access to any Form in the Document Manager, the following message will be displayed: "You don't have form submitter access to any Forms."

- The Name, Availability, and Description are displayed for each Form.
- The number of Forms is shown.
- The Forms are displayed in alphabetical order by name.
- Click on  to View a specific Form.
- Click on  to Show Info for the specific Form.

A Specific Form

**Navigation:** [DocMgr > Forms > Select Desired Form]

Form Info displays the full details for a specific Form.

The User must have Read access to the Form. Read access is determined by the User being a Document Administrator, or having Read access to the parent Document of the Form.

Field Name	Description
<b>Name</b>	The name of this Form.
<b>Description</b>	The description of this Form.
<b>External UUID</b>	The external uuid of this Form. This field is primarily used to interface with external systems.
<b>Doc Number</b>	The document number of the parent document for this form.
<b>Gen Number</b>	The generation number of the parent generation for this form.
<b>Published</b>	The date this form was published.
<b>Modified</b>	The date and time the Form was last modified.

<b>Available</b>	Yes - The Form is available and can receive submissions as long other conditions don't apply. For example, if the Available Start Date has not yet been reached but the Form is available, a user will still not be able to create a submission until the Start Date is reached. No - The Form is not available and cannot receive any/anymore submissions regardless of other availability conditions.
<b>Available Start Date</b>	When specified, a Form will not accept submissions until the start date has been reached. When left blank, this form may start accepting submissions at any time as long as no other availability conditions prevent it from doing so.
<b>Available End Date</b>	When specified, a Form will not accept submissions after the end date has been reached. When left blank, this form may continue accepting submissions indefinitely as long as no other availability conditions prevent it from doing so such as a maximum number of submissions.
<b>Days To Complete</b>	The number of days the user has to complete a submission once they've started one. When left blank, there is no limit and the user may take as long as needed.
<b>Max Submissions</b>	The maximum number of submissions this Form will accept. When left blank, this Form will accept an unlimited number of submissions as long as it is available.

#### 4.13.6. Exporting a Form

Export Form gives form owners the ability to export one or more existing form submissions to a variety of file formats for use elsewhere.

Note:

- The user must have the Forms Manager, Admin privilege, or be the owner of a form to export it.

**Navigation:** *[DocMgr > Forms > Select Desired Form > Side Menu > Export]*

##### **Step 1:**

To search for form submissions to export, enter data in one or more search fields, adjust the search options if necessary, and press the Search button to submit the request. Pressing the Clear Input button will reset all of the search criteria.

Here are a few rules to remember when specifying search criteria:

- The search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and search criteria:



Field	Search Criteria
<b>External UUID</b>	Enter the external UUID or part of the external UUID with wildcards.
<b>Create Date</b>	<p>Search for form submissions created on a specific date. For example: submissions created on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions created for a range of dates. For example: submissions created from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions created since a specific date. For example: submissions created from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for submissions created prior to a specific date. For example: submissions created prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Last Modify Date</b>	<p>Search for form submissions last modified on a specific date. For example: submissions last modified on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions last modified for a range of dates. For example: submissions last modified from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions last modified since a specific date. For example: submissions last modified from 01/19/2001 to present date. Enter</p>

	<p>01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for submissions last modified prior to a specific date. For example: submissions last modified prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Completion Date</b>	<p>Search for form submissions completed on a specific date. For example: submissions completed on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions completed for a range of dates. For example: submissions completed from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions completed since a specific date. For example: submissions completed from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for submissions completed prior to a specific date. For example: submissions completed prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Submitter</b>	Click on the down arrow and select the user from the list.
<b>IP Address</b>	Enter the IP address or part of the IP address with wildcards.
<b>Status</b>	Click on the down arrow and select the status from the list.
<b>New Field</b>	To search on a particular field in the form, you may select and add that field to the search. Once added, you may enter the exact data you are looking for or just part of the data and use wildcards. To add a form field, click on the down arrow and select the field from the list and then click the Add button.

1. To search for submissions to export, enter data in one or more search fields. Refer to the table above for help on searching.
2. Click the Cancel button to cancel the command, click the Search button to submit the request, or click the Clear Input button to reset all of the search criteria.



#### Step 2:

A listing of all of the form submissions that matched the search criteria is displayed.

- If no form submissions were found that matched the search criteria, the following message will be displayed: "No form submissions found matching the specified search criteria".
  - The Form Name and External UUID are displayed for each form submissions.
  - Click on either  or  to Show Form Submission Info.
1. Click the Cancel button to cancel the command, click the Clear Input button to reset all of the search criteria, if you need to refine your search, enter data in another field and click the Search button, or click the Next button to continue.

### Step 3:

A listing of all of the form submissions that matched the search criteria is displayed. You must choose the form submissions to be exported by placing a check in the checkbox in front of the form submission. You can check each form submission individually or you can click the Select All button to select all the form submissions.

- The Form Name and External UUID are displayed for each form submission.
- Click on  or the  to Show Form Submission Info.
- By default, an empty checkbox is displayed in front of each form submission.

### Note:

Only form submissions with a check in the checkbox in front of the form submission will be exported.

1. Choose a form submission to be exported by individually placing a check in the checkbox in front of the form submission or click the Select All button to select all of the form submissions.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, click the Unselect All button to uncheck all previously checked form submissions, click the Next button to continue.

### Step 4:

1. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 5:

1. Select the format the form submissions should be exported to. Currently, the following formats are supported:



- CSV - Produces a comma separated values file that may be imported into other applications.
  - HTML - Produces a single, all inclusive, portable, static HTML file of the form submissions. This static HTML file when viewed in most modern browsers will look very similar to the original live form without any of the live feedback, scripted actions, etc. Note: as HTML rendering varies from browser to browser, the HTML file may appear slightly different.
  - PDF - Produces a single PDF file that may be opened in any application that supports PDF. The PDF file should be a near mirror match of the original form to the extent supported by the PDF format. As the original form is HTML based and PDF is not, there may be small differences due to the lack of capabilities in PDF.
  - XML - Produces a single XML file that can be used by other applications or developers to import the form submission data for their own use.
2. Enter a reason for exporting the form submissions in the Reason box. This is a required field. The maximum length of this field is 255 characters.
  3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to export the form submissions.
  4. Once the OK button has been clicked, TechDoc will begin building your export form request and the download should begin shortly. Normally, the download will start within a second or two but with larger exports (hundreds or thousands) the download may take a bit longer to begin. There is no limit on the number of submissions that can be exported to a single file but keep in mind, not all applications handle larger files. If you experience issues with a PDF, CSV, etc. being very slow/impossible to open/load, it may be more appropriate to export the submissions into chunks so that you have multiple smaller files instead of one large unusable file.

#### 4.13.7. Submitting a Form

Once a form submission has been created and the user has completed filling it out, the user will then click the Submit button. During the submit process, all of the data is packaged up and sent to the Submit Form servlet. Once the Submit Form servlet receives the data, the form submission is finalized, marked as completed and is stored in the database.

#### 4.13.8. Viewing a Form

**Navigation:** [[DocMgr](#) > [Forms](#) > [Select Desired Form](#) > [Side Menu](#) > [Preview](#)]

View Form displays the Form in its rendered version as a user will see it when they are filling out a submission. This function can be useful when designing a form or to check up on a form from time to time to make sure it's functioning properly. Note: When viewing a Form in preview mode, you will not be able to make a submission and other functionalities may be limited. If you wish to test a form in it's entirety you should simply complete a submission to see the form works as designed and then delete that submission.

Once Preview has been clicked on the Side Menu, a new tab should appear in the browser displaying the Form in its rendered version. You should be able to page through the Form (if it has multiple pages), verify the form looks as it should, and test various field constraints such as max length, formatting, etc. When you are finished looking at a Preview of a Form, you may simply close the tab.

## 4.14. Form Submissions

Forms Submissions are created every time a user fills in an Electronic Form and submits it to TechDoc. These form submissions contain the date and time of the submission, each of the form fields recorded values, submission status, etc. These form submissions are fully searchable and can easily be exported and printed based on user-defined criteria.

### 4.14.1. Creating a Form Submission

Create Form Submission is used to create and begin a new form submission. After a form submission has been created, it's up to the user to complete this submission before the form submission time limit expires, or the form's max number of submissions is reached; both of these are dictated by the settings on the Form itself. Once a submission has been created, the user should try, if possible, to complete the submission in a single sitting and get it submitted. However, if the form allows it, the user may elect to complete the form at a later time by utilizing the save progress feature. If a form supports saving/resuming submissions, a save button will appear next to the submit button. A user can click this button at any time to save the progress made on the submission. Then at a later time, the user may revisit the submission (using the same URL as originally used to create the submission) to resume the submission.

### 4.14.2. Modifying a Form Submission

Modify Form Submission can be used to modify the status an existing Form Submission in the Document Manager. To modify the contents of a Form Submission, the Form Submission Status must first be set back to incomplete. Then because the Form Submission is "incomplete" it may be resumed and corrected where need be by the original User, Forms Manager, or Admin.

- The User must have Owner access to the Form Submission.

**Navigation:** *[DocMgr > Forms > Select Desired Form > Side Menu > All Submissions > Select Desired Form Submission > Side Menu > Modify]*

#### **Step 1:**

1. If applicable, modify the Form Submission status.

Status	Definition
<b>Incomplete</b>	A Form Submission that has been started but is not yet complete.
<b>Submitted</b>	A Form Submission that has been submitted by the user but has not yet been processed.
<b>Processing</b>	A submitted Form Submission that is currently being processed.
<b>Processed</b>	A Form Submission that has completed the processing phase and should require no more attention.
<b>Rejected</b>	Used to flag a Form Submission that has been submitted but was rejected because it was not complete, contained invalid data, missed required data, etc.

- 2.
3. Enter the reason for modifying the Form Submission in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the OK button to modify the Form Submission.

Notes:

- The Form Submission record will be modified.
- A history record will be generated for modifying the Form Submission.

#### 4.14.3. Deleting a Form Submission

Delete Form Submission deletes an existing Form Submission in the Document Manager.

- The User must have the Forms privilege.
- The User must have Delete access to the Form Submission. Delete access is determined by the User being a Document Administrator or the actual owner of the Form Submission.

**Navigation:** [DocMgr > Forms > Select Desired Form > Side Menu > All Submissions > Select Desired Form Submission > Side Menu > Delete]

##### Step 1:

The Form Submission to be deleted and the Form Submission attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to delete the Form Submission.

**Step 2:**

The Form Submission to be deleted and the Form Submission attributes are displayed.

1. Enter a reason for deleting the Form Submission in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Form Submission.

**Notes:**

- The Form Submission record will be deleted.
- A history record will be generated for deletion of the Form Submission.

#### **4.14.4. Resuming a Form Submission**

A Form Submission once created, may be saved and resumed if allowed by that Form. Saving and resuming a submission allows the user the ability to complete a form submission little by little over the course of several days, weeks, etc. if necessary. Upon the initial creation of the submission, the user may at any time click the Save button in the lower right hand corner of the form submission window. At a later time, the user can navigate back to the Form Submission in the DM and click Resume or use the URL they originally accessed to create the submission to begin with; typically this is the case for a Remote User. The user can save and resume as many times as needed as long as the Form is still available and the days to complete limit on the form hasn't expired.

#### **4.14.5. Searching for Form Submissions**

Search Form Submissions gives form owners the ability to search all of the submissions made for a particular form.

**Note:**

- The user must have the Forms Manager, Admin privilege, or be the owner of a form to search submissions.

**Navigation:** *[DocMgr > Forms > Select Desired Form > Side Menu > Search Submissions]*

**Step 1:**

To search for form submissions, enter data in one or more search fields, adjust the search options if necessary, and press the Search button to submit the request. Pressing the Clear Input button will reset all of the search criteria.

Here are a few rules to remember when specifying search criteria:

- The search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and search criteria:

Field	Search Criteria
<b>External UUID</b>	Enter the external UUID or part of the external UUID with wildcards.
<b>Create Date</b>	<p>Search for form submissions created on a specific date. For example: submissions created on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions created for a range of dates. For example: submissions created from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions created since a specific date. For example: submissions created from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for submissions created prior to a specific date. For example: submissions created prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Last Modify Date</b>	Search for form submissions last modified on a specific date. For example: submissions last modified on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.



	<p>Search for submissions last modified for a range of dates. For example: submissions last modified from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions last modified since a specific date. For example: submissions last modified from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for submissions last modified prior to a specific date. For example: submissions last modified prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Completion Date</b>	<p>Search for form submissions completed on a specific date. For example: submissions completed on 02/03/2001. Enter 02/03/2001 to 02/03/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions completed for a range of dates. For example: submissions completed from 01/18/2001 to 01/23/2001. Enter 01/18/2001 to 01/23/2001 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for submissions completed since a specific date. For example: submissions completed from 01/19/2001 to present date. Enter 01/19/2001 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for submissions completed prior to a specific date. For example: submissions completed prior to 01/23/2001. Enter 01/23/2001 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Submitter</b>	Click on the down arrow and select the user from the list.
<b>IP Address</b>	Enter the IP address or part of the IP address with wildcards.
<b>Status</b>	Click on the down arrow and select the status from the list.
<b>New Field</b>	To search on a particular field in the form, you may select and add that field to the search. Once added, you may enter the exact data you are looking for or just part of the data and use wildcards. To add a form field, click on the down arrow and select the field from the list and then click the Add button.

1. To search for submissions, enter data in one or more search fields. Refer to the table above for help on searching.

- Click the Cancel button to cancel the command, click the Search button to submit the request, or click the Clear Input button to reset all of the search criteria.

#### Step 2:

A listing of all of the form submissions that matched the search criteria is displayed.

- If no form submissions were found that matched the search criteria, the following message will be displayed: "No form submissions found matching the specified search criteria".
- The Form Name and External UUID are displayed for each form submissions.
- Click on either  or  to Show Form Submission Info.
- Click the Search button to perform an updated search, click the Cancel button to cancel the command, click the Clear Input button to reset all of the search criteria.

### 4.14.6. Showing a Form Submission

Show Form Submission displays the details for multiple Form Submissions or a specific Form Submission.

#### **All Submissions**

**Navigation:** *[DocMgr > Forms > Select Desired Form > Side Menu > All Submissions]*

All Submissions shows all of the Form Submissions of the selected Form.

The User must have Read access to the Form.

On this screen, all of the Form Submissions of the selected Form are displayed. Some Forms may have a large number of submissions making it difficult to find a particular submission. If needed, the Date Range boxes can be used to say only show Form Submissions created on and after the starting date (left box) and/or before the ending date (right box).

- To display Form Submissions for a specific date. For example, display Form Submissions created on 02/03/2001. Under Show Form Submissions with in the Date Range box enter 02/03/2001 to 02/03/2001. Use: mm/dd/yyyy.
- To display Form Submissions for a range of dates. For example, display Form Submissions created from 01/18/2001 to 01/23/2001. Under Show Form Submissions with in the Date Range box enter 01/18/2001 to 01/23/2001. Use: mm/dd/yyyy.
- To display Form Submissions since a specific date. For example, display Form Submissions created from 01/19/2001 to present date. Under Show Form Submissions

with in the Date Range box enter 01/19/2001 in first date field. Leave second date field blank. Use: mm/dd/yyyy.

- To display Form Submissions prior to a specific date. For example, display Form Submissions created prior to 01/23/2001. Under Show Form Submissions with in the Date Range box enter 01/23/2001 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
- To display all Form Submissions under Show Form Submissions with in the Date Range box leave both date fields blank.

1. Enter the desired date(s) in the Date Range box.
2. Click the Clear Input button to clear the Date Range box or click the OK button to display the Form Submissions.

#### A Specific Form Submission

**Navigation:** [[DocMgr](#) > [Forms](#) > [Select Desired Form](#) > [Side Menu](#) > [All Submissions](#) > [Select Desired Form Submission](#)]

Form Submission Info displays the full details for a specific Form Submission.

The User must have Read access to the Form Submission. Read access is determined by the User being a Document Administrator, or the actual owner of the Form Submission.

Field Name	Description
<b>Form</b>	The parent Form the submission belongs to.
<b>External UUID</b>	The external uuid of this Form Submission. This field is primarily used to interface with external systems.
<b>Doc Number</b>	The document number of the parent document of the form.
<b>Gen Number</b>	The generation number of the parent generation of the form.
<b>Created</b>	The date and time this Form Submission was created.
<b>Modified</b>	The date and time the Form Submission was last modified.
<b>Completed</b>	The date and time the Form Submission was completed.
<b>Submitter</b>	The User that created this Form Submission.
<b>IP Address</b>	The IP Address of the Submitter.
<b>Status</b>	Form Submissions can be marked with various statuses to indicate their current state in the system. Currently, TechDoc only works with two Statuses directly. Once a Form Submission is started by a user, it is



	<p>marked as incomplete. Once a user completes the Form Submission and clicks the Submit button, the system marks the submission as Submitted. From here, it is up to a Forms Manager, Admin, or Workflow Process to pick up the Form Submission and perform additional processing. The various Statuses are:</p> <ul style="list-style-type: none"><li>• Incomplete - A Form Submission that has been started but is not yet complete.</li><li>• Submitted - A Form Submission that has been submitted by the user but has not yet been processed.</li><li>• Processing - A submitted Form Submission that is currently being processed.</li><li>• Processed - A Form Submission that has completed the processing phase and should require no more attention.</li><li>• Rejected - Used to flag a Form Submission that has been submitted but was rejected because it was not complete, contained invalid data, missed required data, etc.</li></ul>
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### Form Submission Entries

Form Submission Entries displays each of the form fields and their values as submitted by the user. The first column display the internal ID of the form field (as defined by the Form) and the value that was input by the user.

#### 4.14.7. Viewing a Form Submission

**Navigation:** [*DocMgr > Forms > Select Desired Form > Side Menu > All Submissions > Select Desired Submission > View*]

View Form Submission can be used to display a rendered Form Submission (the final product). From this screen, one can print the Form Submission if needed; the printed result should look nearly identical to the rendered version on the screen. When viewing a Form Submission, the submission will be read only; the data will not be editable. If this Form Submission requires editing, it must first be modified back to the "Incomplete" status. From there one can resume the Form Submission and make any corrections needed. Once satisfied, the user can then click Submit to submit the updated version of the Form. If more than one Form needs to be printed or saved, the Export Form function should be used instead.

### 4.15. General Information

TechDoc has several places that display various pieces of information to assist or inform Users.

### **4.15.1. About**

The About page displays generic information about the system and some of the more important features that it has.

### **4.15.2. Contact Us**

The Contact Us page provides information on contacting us. If you are having trouble, you should always attempt to contact your local help desk or TechDoc Administrator first. They are most likely to know your local configuration and guidelines for managing Documents and Records.

### **4.15.3. Display Page**

Display Page is used to display a generic help page. Page files can be created in TechDoc's 'etc' directory and then displayed with this command.

### **4.15.4. Home Page**

The Home page is the default page that most people should be sent to when first accessing the system. The page should contain information that tells visitors what the intended purpose of the system is and potentially inform them about any restrictions that may apply for using the system.

### **4.15.5. News**

The News page is used to display important news pertaining to this system. The news might include information about upcoming outages, recent or upcoming upgrades, etc.

### **4.15.6. Support**

The Support page identifies whom to contact for support. Normally, users should always attempt to contact their local help desk or TechDoc Administrator first. They are most likely to know the local configuration and guidelines for managing Documents and Records.

## **4.16. Generations**

A Generation is a file representing a specific version of a Document. A Document is usually made up of one or more Generations. Each time a Document is reserved and replaced, a new Generation is created in TechDoc for the file uploaded. There are special cases when the file for a Document cannot be put into TechDoc because the file is required to reside elsewhere. In addition, the Document could represent something physical such as a VHS tape, old hard drive, etc. In either case, when a file cannot be uploaded into TechDoc, a Document can still be

created as a Non-Resident Document to track the item. A Non-Resident Document is just like any other Document except that no files are stored in TechDoc.

### 4.16.1. Modifying a Generation

Modify Generation modifies an existing Generation's attributes.

- The User must have the Modify Generation privilege.
- The User must have Modify access to the Document/Generation.

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Generation > Side Menu > Modify]

#### **Modifying a Generation**

1. If applicable, modify the file name in the File Name box. This is the file name for this Generation when the Document is fetched. The file name extension may not be changed. File name is a required field. The maximum length of this field is 128 characters.
2. If applicable, modify the Mime Type in the Mime Type box by clicking on the down arrow and selecting it from the list.
3. If applicable, modify the revision in the Revision box. The maximum length of this field is 32 characters. Note: The PDF revision will automatically be updated. This field will not be displayed if the Document has not been released. Only an Admin can modify the revision of a Generation.

Restricted Fetch Access allows you to add additional security to the Document.

4. If applicable, modify the Fetch access in the Fetch Access box by clicking on the down arrow and selecting it from the list.

Fetch Access	Definition
<b>Normal</b>	Allows anyone within the selected domain Read access.
<b>Restricted</b>	All Read access is removed from the Document. To fetch the Document, the Document owner must add Users to the access list and assign them Read access, or if a password has been assigned to the Generation, you must know the password.

5. If a password had previously been assigned to this Generation the Old Password box will be displayed. To remove the previously assigned password for this Generation, click the box next to "Remove the password from this Generation". This will place a check in the

box. The Old Password box will not be displayed if password has not been previously assigned to this Generation.

6. Assigning a password to this Generation of the Document allows this Generation to be fetched by someone who is not logged in to the Document Manager. Anybody can fetch this Generation using the Document number and password when prompted by his or her web browser.
7. If applicable, assign a password in the Password box or New Password box if a password had previously been assigned. The password must be at least 8 characters long. The password must contain at least 3 of the 4 different types of characters. The four types of characters are uppercase letter, lowercase letter, digit, and special character.
8. If a password is entered in the Password box or New Password box if a password had previously been assigned, you must verify the Generation password in the Verify box or New Verify box if a password had previously been assigned. The password and the verify password must match.
9. Enter the reason for modifying this Generation in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
10. Click the Cancel button to cancel the command, or click the OK button to modify the Generation.

#### 4.16.2. Modifying a Nonresident Generation

Modify Nonresident Generation modifies an existing Nonresident Generation's attributes.

- The User must have the Modify Generation privilege.
- The User must have Modify access to the Document/Generation.

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Generation > Side Menu > Modify]

##### **Modifying a Nonresident Generation**

1. If applicable, modify the URL in the Nonresident URL box. When specified, this URL identifies where the Generation or information about the Generation can be found on the Internet. If the Generation is released and sent to a Search Manager, this URL will be used as the fetch URL for the Document. Nonresident URL is an optional field. The maximum length of this field is 2000 characters.
2. Enter the reason for modifying this Generation in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
3. Click the Cancel button to cancel the command, or click the OK button to modify the Generation.

Modifying a Metric Generation

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Generation > Side Menu > Modify]

This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Modify Generation modifies an existing Metric Generation's attributes.

- The User must have the Modify Generation privilege.
  - The User must have Modify access to the Document/Generation.
1. If applicable, modify the file name in the File Name box. This is the file name for this Generation when the Document is fetched. The file name extension may not be changed. File name is a required field. The maximum length of this field is 128 characters.
  2. If applicable, modify the Mime Type in the Mime Type box by clicking on the down arrow and selecting it from the list.
  3. If applicable, modify the revision in the Revision box. The maximum length of this field is 32 characters. Note: The PDF revision will automatically be updated. This field will not be displayed if the Document has not been released. Only an Admin can modify the revision of a Generation.

Restricted Fetch Access allows you to add additional security to the Document.

4. If applicable, modify the Fetch access in the Fetch Access box by clicking on the down arrow and selecting it from the list.

Fetch Access	Definition
<b>Normal</b>	Allows anyone within the selected domain Read access.
<b>Restricted</b>	All Read access is removed from the Document. To fetch the Document, the Document owner must add Users to the access list and assign them Read access, or if a password has been assigned to the Generation, you must know the password.

5. If a password had previously been assigned to this Generation the Old Password box will be displayed. To remove the previously assigned password for this Generation, click the box next to "Remove the password from this Generation". This will place a check in the box. The Old Password box will not be displayed if password has not been previously assigned to this Generation.
6. Assigning a password to this Generation of the Document allows this Generation to be fetched by someone who is not logged in to the Document Manager. Anybody can fetch this Generation using the Document number and password when prompted by his or her web browser.

7. If applicable, assign a password in the Password box or New Password box if a password had previously been assigned. The password must be at least 8 characters long. The password must contain at least 3 of the 4 different types of characters. The four types of characters are uppercase letter, lowercase letter, digit, and special character.
8. If a password is entered in the Password box or New Password box if a password had previously been assigned, you must verify the Generation password in the Verify box or New Verify box if a password had previously been assigned. The password and the verify password must match.
9. If applicable, modify the Metric status in the Metric Status box by clicking on the down arrow and selecting it from the list. This field will only be displayed if it has a Metric status icon.
10. If applicable, modify the Metric date in the Metric Date box. Enter the date as mm/dd/yyyy. Metric date is usually the reporting end date for the Metric. For example, if the Metric you are putting in is for the project performed during the month of July, it is likely that the Metric Date would be 07/31/2004. An active Metric is required to have a date. An inactive Metric is not allowed to have a date. This field will only be displayed if it has a Metric status icon.
11. Enter the reason for modifying this Generation in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
12. Click the Cancel button to cancel the command, or click the OK button to modify the Generation.

#### Notes:

- If Document owner forgets the password assigned to this Generation, contact the Document Administrator. The Document Administrator can remove or change your password but they do not know the password that was originally assigned to this Generation.
- If this Generation was released through a completed Review and the revision was changed, the completed Review's revision is also changed to reflect this new value.
- If the Document the Generation belongs to is a Metric, the Generation being modified is a native Generation (Not the rendered one), the Generation has been released, and the MetricRevisionFormat System Property has a value, a "Use: XXX" type message will be displayed just to the right of the revision.
- If the Document the Generation belongs to is a Metric, the Generation being modified is a native Generation (not the rendered one), and the Generation has been released, then 2 extra columns can be modified: Metric Status and Metric Date.
- A history record will be generated for modification of the Generation.
- Email will be sent to the notification associated with the Document.

### 4.16.3. Deleting a Generation

Delete Generation deletes a specific Generation of a Document. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Delete Generation privilege.
- The User must have Delete access to the Document/Generation or Rendition if deleting a Rendition.
- If the last remaining Generation of a Document is deleted, the Document will become a nonresident Document and will have a non resident Generation.
- The Generation cannot be deleted if it has been released.
- The Generation cannot be deleted if the Document is reserved or in Review.

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Generation > Side Menu > Delete]

**Step 1:**

The Generation to be deleted and the Generation attributes are displayed.

1. Click the Cancel button to cancel the command or click the Next button to continue.

**Step 2:**

The Generation to be deleted and the Generation attributes are displayed.

1. Enter the reason for deleting this Generation in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Generation.

**Notes:**

- A history record will be generated for deletion of the Generation.
- If the Generation's type is native, the native Generation and all renditions of the Generation are deleted. If the Generation's type is not native, only that Rendition of the Generation is deleted.
- Email will be sent to the notification associated with the parent Document that the Generation was deleted under.

#### **4.16.4. Showing a Generation**

Generation Info shows the full details for a specific Generation. If the Generation is not resident, several file related fields will not be displayed because the physical file for the Generation does not reside in this system.

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Generation > Side Menu > Show Info]

**A Specific Generation**

The User must have Read access to the Document/Generation.





<b>Field Name</b>	<b>Description</b>
<b>Number</b>	The Document number that this Generation belongs to. Click on the Document number link to return to the explore view of the Document.
<b>Generation</b>	The number of this Generation.
<b>Gen Creator</b>	The User that created this Generation. Click the gen creator name link to display the User Info screen.
<b>Created</b>	The date and time this Generation was created.
<b>Revision</b>	The revision name assigned to the Generation when it was released, or blank if the Generation hasn't been released.
<b>Released</b>	The date and time this Generation was released, or blank if this Generation has not been released.
<b>Resident</b>	Yes - The Generation is resident, meaning that the Generation is stored in TechDoc. No - The Generation is not resident, meaning that TechDoc has information about the Generation but it physically resides somewhere else. For example, a Generation could be stored in a file cabinet or another computer system.
<b>Gen File Name</b>	The file name for this Generation when this Generation is fetched.
<b>File Size</b>	The size in kilobytes of the uncompressed physical file associated with this Generation.
<b>Mime Type</b>	The Mime Type for this Generation; for example, for a file extension of .doc the mime type associated would be application/msword.
<b>Fetch Access</b>	Normal - No restrictions have been associated to this Generation. Restricted - Only the Document owner or Users on the access list can fetch this Generation, or if a password has been assigned to this Generation you must know the password.
<b>Password</b>	If the Fetch Access is Normal or Restricted, and no password has been assigned to this Generation, the following message will be displayed: "No password for fetching has been assigned". If the Fetch Access is Normal or Restricted", and password has been assigned to this Generation, the following message will be displayed: "Anybody can










	fetch this Generation using the Document number and password when prompted by their web browser."
<b>Nonresident URL</b>	The nonresident URL associated with this Generation. Note: It will not be shown if the Generation is resident or no URL has been associated to the Generation.
<b>File Path</b>	The full file name and location of the Generation file stored on the server. Note: Only an Admin can view the file path of a Generation file.
<b>Encrypted</b>	<p>Indicates if this file has been stored encrypted.</p> <p>Note: Files uploaded will now be encrypted if the Document's Document Category specifies this as a requirement. This process is transparent to the end User. When a file is uploaded, the system encrypts the file and places it in the File Area encrypted. When a file is fetched, an unencrypted copy is sent. This is also true for rendered Generations. When a file is rendered, the PDF is encrypted. When a User goes to fetch the PDF, an unencrypted copy is sent.</p> <p>Yes - File has been stored encrypted. No - File has not been stored encrypted.</p>
<b>RMA Record</b>	<p>Yes - One or more RMA Records currently exist for this Generation. No - This Generation does not have any RMA Records for it in the system.</p>

Metric Info

This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics and the Generation has a Metric status icon.

<b>Field Name</b>	<b>Description</b>
<b>Metric Status</b>	<p>The current status of this Generation. Note: This field will only be displayed if it has a Metric status icon.</p> <p>A Metric status can be:</p> <ul style="list-style-type: none"> <li> Inactive</li> <li> Green - Improving</li> <li> Green - Staying Constant</li> <li> Green - Worsening</li> </ul>

	 Yellow - Improving  Yellow - Staying Constant  Yellow - Worsening  Red - Improving  Red - Staying Constant  Red - Worsening  <p>A late Metric icon will be displayed as opaque. For example, </p> <p>Stoplight Criteria</p> <p>Green represents progress according to plan.</p> <p>Yellow represents an area of concern.</p> <p>Red represents a significant problem.</p>
<b>Metric Date</b>	<p>The Metric date of this Generation. The Metric date is usually the reporting end date for the Metric. An active Metric is required to have a date. If this Generation is inactive, the Metric date field will be blank. This field will only be displayed if it has a Metric status icon.</p>

## 4.17. Groups

Groups provide a convenient way to Associate Access, Commenters, Notification, and Distribution for a group of people. There are four types of people that can be added to a Group: External Group Members, Local Users, Remote Emails, and Remote Users, but only one type of people may be used per Group. Users can create and customize their own Groups. In addition, the system automatically maintains Groups of Local Users for each Employer and Organization in the system.

### 4.17.1. Creating a Group

Create Group creates a new Group in the Document Manager. A Group provides a convenient way to associate access, commenters, notification, and distribution for a group of people. There are four types of people that can be added to a Group: External Group Members, Local Users, Remote Emails, and Remote Users; only one type of people may be used per Group. Users can create and customize their own Groups. In addition, the system automatically maintains Groups of Local Users for each Employer and Organization in the system.

A Group in the Document Manager is simply a Group of External Group Members, Local Users, Remote Users or Remote Emails. Access is not assigned to the Group until the Group is associated to a Document, Cabinet, Folder, etc.

- The User must have the Groups privilege.
- Only the Document Administrator can change the owner of the Group.
- The name of the new Group cannot be the same as any other Group in the system.
- The new Group cannot include the same member more than once.
- External Groups are managed by an external source (LDAP, SAML, Windows Domain, etc.) so TechDoc has no control over which members are in one of these groups. Because External Groups are tightly tied to the Authenticators that maintain the memberships, only Admins can create Enternal groups.

**Navigation:** [DocMgr > Groups > Side Menu > Create]

**Step 1:**

1. Enter the Group name in the Name box. Group names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.
2. Enter the description of the Group in the Description box. The maximum length of this field is 128 characters.
3. Enter the owner of Group in the Owner box by clicking on the down arrow and selecting a name from the list.
4. Enter type of Group in the Group Type box by clicking on the down arrow and selecting it from the list.

Type of Group	Definition
<b>Private</b>	Created for your use only.
<b>Shared</b>	Created for anyone to use.

5. Enter the member type of Group in the Member Type box by clicking on the down arrow and selecting it from the Group. Note: Only one type of people may be used per Group.

Member Type	Definition
<b>External Group Members</b>	Members are externally managed by a remote authentication service (LDAP, SAML, Windows Domain, etc.) One or more Authenticators must be configured to return external group identifiers at the time TechDoc authenticates a user against that service to determine the user's membership in any external groups.
<b>Local Users</b>	Users that have accounts on this Document Manager.

<b>Remote Emails</b>	Email addresses.
<b>Remote Users</b>	Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that does not have a TechDoc account would use their Windows domain username.

6. By default, your Organization is entered in the Organization box. If you need to change the Organization, click on the down arrow and select it from the list. The Organization selected is the Organization the Group will belong to.
7. Enter the group external identifier in the External Group ID box if this is an External Group (a group that contains External Group Members). The value entered into this box depends on what group identifiers that an Authenticator returns for groups assigned to a user. For example, a Windows Domain authenticator returns the SIDS (in string value format) for the groups a user belongs to. So to create an external group referring to a Windows Domain Group, you would enter the string value for the group's SID in the box.
8. Enter the reason for creating the Group in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

Users can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Users at some point but none of the actual members have been determined yet.

Note: Available Users are Users that have a TechDoc account, on this Document Manager, and whose name does not appear in the Users on Group. Once a User's name appears in the Users on Group, the name is removed from the Available Users box.

1. Select the User in the Available Users box (on the left) to be on the Group by clicking on the name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted User to the Users on Group box. To remove a User from the Users on Group box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Users on Group box. To show Users info click on a User and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Group.

#### Step 3:

Remote Users are Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that does not have a TechDoc account would use their Windows domain username.

Remote Users can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Remote Users at some point but none of the actual members have been determined yet.

The Remote User fields displayed are:

- A drop down list of valid Remote Authenticators for the Document manager.
  - A text field to type in the Remote User's username.
  - An organization field to type in the Remote User's optional organization.
  - An email address field to type in the Remote User's optional email address.
1. To add a Remote User, in the New Remote User box, click on the down arrow and select a Remote Authenticator from the list. This cannot be left as Choose One. Enter a Remote username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, optionally enter the Remote User's email address. Click the Add button.
  2. To remove a Remote User, click the Remove button next to the Remote User that you would like to remove.
  3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Group.

Step 4:

Remote Email can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Remote Emails at some point but none of the actual members have been determined yet.

1. To add a Remote Email, in the New Remote Email box, enter the User's Remote Email address. Click the Add button.
2. To remove a Remote Email, click the Remove button next to the Remote Email that you would like to remove.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Group.

Note:

- A history record will be generated for creation of the Group.

### 4.17.2. Modifying a Group

Modify Group allows a User to customize their own Groups. A Group provides a convenient way to associate access, commenters, notification, and distribution for a group of people. There are four types of people that can be added to a Group: External Group Members, Local Users, Remote Emails, and Remote Users; only one type of people may be used per Group. Users can create and customize their own Groups. In addition, the system automatically maintains Groups of Local Users for each Employer and Organization in the system.

A Group in the Document Manager is simply a Group of External Group Members, Local Users, Remote Users or Remote Emails. Access is not assigned to the Group until the Group is associated to a Document, Cabinet, Folder, etc.

- The User must have the Groups privilege.
- The User must have Modify access to the Group. Modify access is determined by the User, being a Document Administrator, or the actual owner of the Group.
- Only the Document Administrator can change the owner of the Group.
- The name of the specified Group cannot be changed to the same as any other Group in the system.
- The Group must have at least one member.
- The specified Group cannot include a member more than once.
- External Groups are managed by an external source (LDAP, SAML, Windows Domain, etc.) so TechDoc has no control over which members are in one of these groups. Because External Groups are tightly tied to the Authenticators that maintain the memberships, only Admins can create External groups.

**Navigation:** [*DocMgr > Groups > Select Desired Group > Side Menu > Modify*]

#### **Step 1:**

1. If applicable, modify the Group name in the Name box. Group names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.
2. If applicable, modify the description of the Group in the Description box. The maximum length of this field is 128 characters.
3. If applicable, modify the owner of Group in the Owner box by clicking on the down arrow and selecting a name from the list. Only an Admin can assign the owner of a Group.
4. If applicable, modify type of Group in the Group Type box by clicking on the down arrow and selecting it from the list.

Type of Group	Definition
Private	Created for your use only.
Shared	Created for anyone to use.

5. Note: The Member Type field is displayed but cannot be modified.

Member Type	Definition
External Group Members	Members are externally managed by a remote authentication service (LDAP, SAML, Windows Domain, etc.) One or more Authenticators must be configured to return external group identifiers at the time TechDoc authenticates a user against that service to determine the user's membership in any external groups.
Local Users	Users that have accounts on this Document Manager.
Remote Emails	Email addresses.
Remote Users	Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that does not have a TechDoc account would use their Windows domain username.

6. If applicable, modify the Group Organization in the Organization box by clicking on the down arrow and selecting it from the list. The Organization selected is the Organization the Group will belong to.
7. If applicable, modify the group external identifier in the External Group ID box if this is an External Group (a group that contains External Group Members). The value entered into this box depends on what group identifiers that an Authenticator returns for groups assigned to a user. For example, a Windows Domain authenticator returns the SIDS (in string value format) for the groups a user belongs to. So to create an external group referring to a Windows Domain Group, you would enter the string value for the group's SID in the box.
8. Enter the reason for modifying the Group in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the Next button to continue.

Step 2:

Users can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Users at some point but none of the actual members have been determined yet.

Note: Available Users are Users that have a TechDoc account, on this Document Manager, and whose name does not appear in the Users on Group. Once a User's name appears in the Users on Group, the name is removed from the Available Users box.

1. Select the User in the Available Users box (on the left) to be on the Group by clicking on the name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted User to the Users on Group box. To remove a User from the Users on Group box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Users on Group box. To show Users info click on a User and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to modify the Group.

Step 3:

Remote Users are Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that does not have a TechDoc account would use their Windows domain username.

Remote Users can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Remote Users at some point but none of the actual members have been determined yet.

The Remote User fields displayed are:

- A drop down list of valid Remote Authenticators for the Document manager.
  - A text field to type in the Remote User's username.
  - An organization field to type in the Remote User's optional organization.
  - An email address field to type in the Remote User's optional email address.
1. To add a Remote User, in the New Remote User box, click on the down arrow and select a Remote Authenticator from the list. This cannot be left as Choose One. Enter a Remote username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the



Email Address box, optionally enter the Remote User's email address. Click the Add button.

2. To remove a Remote User, click the Remove button next to the Remote User that you would like to remove.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to modify the Group.

#### Step 4:

Remote Email can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Remote Emails at some point but none of the actual members have been determined yet.

1. To add a Remote Email, in the New Remote Email box, enter the User's Remote Email address. Click the Add button.
2. To remove a Remote Email, click the Remove button next to the Remote Email that you would like to remove.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to modify the Group.

#### Note:

- A history record will be generated for modification of the Group.

### 4.17.3. Deleting a Group

Delete Group deletes an existing Group in the Document Manager.

- The User must have the Groups privilege.
- The User must have Delete access to the Group. Delete access is determined by the User being a Document Administrator or the actual owner of the Group.
- The specified Group cannot be deleted if it is associated with any Review Teams.

**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > Delete]*

#### Step 1:

The Group to be deleted and the Group attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to delete the Group.

**Step 2:**

The Group to be deleted and the Group attributes are displayed.

1. Enter a reason for deleting the Group in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Group.

**Notes:**

- The Group record will be deleted.
- The associated access record will be deleted.
- The associated mail record will be deleted.
- A history record will be generated for deletion of the Group.

**4.17.4. Showing Groups**






Show Group displays Groups created in the Document Manager.

***Admin Groups***

**Navigation:** *[DocMgr > Groups > Side Menu > Admin Groups]*

All Admin Groups displays all the Groups, both private and shared, created in the Document Manager by Users with the Admin privilege. Private Groups are available for your use only. Shared Groups are available for anyone to use.

Note: Only Admins can show Admin Groups.







- The Name and Description are displayed for each Group.
- The number of Groups is shown.
- The Groups are displayed in alphabetical order by the member type. The member types are: Local Users, Remote Users, Remote Emails and External Group Members.
- Click on  to View Local Users Group Info for the specific Group.
- Click on  to View Remote Users Group Info for the specific Group.
- Click on  to View Remote Emails Group Info for the specific Group.
- Click on  to View External Group Info for the specific Group.
- Click on  to Show Info for the specific Group.

## All Groups

**Navigation:** [DocMgr > Groups > Side Menu > All Groups]

All Groups displays all the Groups, both private and shared, that have been created in the Document Manager. Private Groups are available for your use only. Shared Groups are available for anyone to use.



Note: Only Admins can show All Groups.

- The Name and Description are displayed for each Group.
- The number of Groups is shown.
- The Groups are displayed in alphabetical order by the member type. The member types are: Local Users, Remote Users, Remote Emails and External Group Members.
- Click on  to View System Group Info for the specific Group.
- Click on  to View Local Users Group Info for the specific Group.
- Click on  to View Remote Users Group Info for the specific Group.
- Click on  to View Remote Emails Group Info for the specific Group.
- Click on  to View External Group Info for the specific Group.
- Click on  to Show Info for the specific Group.

## External Groups

**Navigation:** [DocMgr > Groups > Side Menu > External Groups]

External Groups displays all the External Groups in the Document Manager. Admins can see all private and shared External Groups. Non-admin users can only see External Groups that are shared.






- The Name, External Group Identifier, and Description are displayed for each External Group.
- The number of Groups is shown.
- The Groups are displayed in alphabetical order.
- Click on  to View External Group Info for the specific Group.
- Click on  to Show Info for the specific Group.

## My Groups

**Navigation:** [DocMgr > Groups > Side Menu > My Groups]

My Groups displays all the Groups, both private and shared, that you are currently the owner of in the Document Manager. If you have Owner access to a Group but are not the actual owner of






the Group, it will not be displayed here. Private Groups are available for your use only. Shared Groups are available for anyone to use.

- The Name and Description are displayed for each Group.
- The number of Groups is shown.
- The Groups are displayed in alphabetical order by the member type. The member types are: Local Users, Remote Users, Remote Emails, and External Group Members.
- Click on  to View Local Users Group Info for the specific Group.
- Click on  to View Remote Users Group Info for the specific Group.
- Click on  to View Remote Emails Group Info for the specific Group.
- Click on  to View External Group Info for the specific Group.
- Click on  to Show Info for the specific Group.

### All Owner Groups

**Navigation:** [DocMgr > Groups > Side Menu > Owner Groups]

Owner Groups displays all the Groups in the Document Manager that you have Owner access to. If you are the actual owner of a Group, it will not be displayed here.







- The Name and Description are displayed for each Group.
- The number of Groups is shown.
- The Groups are displayed in alphabetical order by the member type. The member types are: External Group Members, Local Users, Remote Emails and Remote Users.
- Click on  to View External Group Info for the specific Group.
- Click on  to View Local Users Group Info for the specific Group.
- Click on  to View Remote Emails Group Info for the specific Group.
- Click on  to View Remote Users Group Info for the specific Group.
- Click on  to Show Info for the specific Group.

### Shared Groups

**Navigation:** [DocMgr > Groups > Side Menu > Shared Groups]

Shared Groups displays all the Shared Groups, including your Shared Groups, and System Shared Groups that have been created in the Document Manager. Shared Groups are available for anyone to use.



- The Name and Description are displayed for each Group.

- The number of Groups is shown.
- The Groups are displayed in alphabetical order by the member type. The member types are: Local Users, Remote Users, Remote Emails and External Group Members.
- Click on  to View System Group Info for the specific Group.
- Click on  to View Local Users Group Info for the specific Group.
- Click on  to View Remote Users Group Info for the specific Group.
- Click on  to View Remote Emails Group Info for the specific Group.
- Click on  to View External Group Info for the specific Group.
- Click on  to Show Info for the specific Group.

### System Groups

**Navigation:** [DocMgr > Groups > Side Menu > System Groups]



System Groups displays all the System Groups that have been created in the Document Manager. There are two types of System Groups: System Employer Groups - Contains all the Users that belong to that specific Employer. System Organization Groups - Contains all the Users that belong to that specific Organization. System Groups are available for anyone to use.

- The Name and Description are displayed for each Group.
- The number of Groups is shown.
- The Groups are displayed in alphabetical order by System Groups. For example: Employer (Emp), Organization (Org).
- Click on  to View System Group Info for the specific Group.
- Click on  to Show Info for the specific Group.

### All Users

**Navigation:** [DocMgr > Groups > Side Menu > Users]

All Users displays all the Users in the Document Manager.

- The Username and Full Name are displayed for each User.
- The number of Users is shown.
- Users are listed in alphabetical order by their Full Name.
- Click on  to view User info for a specific User.
- Click on  to show info for a specific User.

## A Specific Group

**Navigation:** [*DocMgr > Groups > Select Desired Group*]

Group Info displays the full details for a specific Group.

The User must have Read access to the Group. Read access is allowed for Admins, being the owner of the Group, being associated for owner access of a Group, or if the Group is a Shared Group.



Field Name	Description
<b>Name</b>	The name of this Group.
<b>Description</b>	The description of this Group.
<b>Owner</b>	The User that owns this Group. Click the owner's name link to display the User Info screen. Note: For a System Group, this field will display as N/A.
<b>Organization</b>	The Organization that this Group belongs to. Note: For a System Group, this field will display as N/A.
<b>Group Type</b>	<p>Private - Created for your use only.</p> <p>Shared - Created for anyone to use.</p> <p>System Employer Group - Contains all the Users that belong to that specific Employer.</p> <p>System Organization Group - Contains all the Users that belong to that specific Organization.</p>
<b>Member Type</b>	<p>External Group Members - Members are externally managed by a remote authentication service (LDAP, SAML, Windows Domain, etc.) One or more Authenticators must be configured to return external group identifiers at the time TechDoc authenticates a user against that service to determine the user's membership in any external groups.</p> <p>Local Users - Users that have accounts on this Document Manager.</p> <p>Remote Emails - Email addresses.</p> <p>Remote Users - Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that</p>

	does not have a TechDoc account would use their Windows domain username.
<b>External Group ID</b>	If this is an External Group, the External Group Identifier will be displayed here. The actual value of this field depends on what type of group identifiers an Authenticator returns for groups assigned to a user. For example, a Windows Domain authenticator returns the SIDS (in string value format) for the groups a user belongs to. So in that case, this field would contain the Windows Domain Group's SID in string value form.
<b>Created</b>	The date and time this Group was created.

## Group Members

Group members are all the members for a specific Group. The Group members displayed will be Local Users, Remote Emails, or Remote Users.

External Groups are managed by an external source (LDAP, SAML, Windows Domain, etc.) so TechDoc has no control over which members are in one of these groups. For this reason, members are not shown for External groups.

- The Username and Full Name are displayed for each Local User on the Group.
- The Email Address is displayed for each Remote Email on the Group.
- The Username, Organization, and Email Address are displayed for each Remote User on the Group.
- The number of members is shown.
- The members are listed in alphabetical order by Full Name, Email Address, or Username depending on the group type.
- Click on  to View Info for a specific member.
- Click on  to Show Info for a specific member.

### 4.17.5. Copying a Group

Copy Group creates a new Group by copying the members from an existing Group, and allowing it to be modified before saving the new Group. A Group provides a convenient way to associate access, commenters, notification, and distribution for a group of people. There are four types of people that can be added to a Group: External Group Members, Local Users, Remote Emails, and Remote Users; only one type of people may be used per Group. Users can create and customize their own Groups. In addition, the system automatically maintains Groups of Local Users for each Employer and Organization in the system.

A Group in the Document Manager is simply a Group of External Group Members, Local Users, Remote Users or Remote Emails. Access is not assigned to the Group until the Group is associated to a Document, Cabinet, Folder, etc.

- The User must have the Groups privilege.
- The User must have Read access to the existing Group.
- Only the Document Administrator can change the owner of the Group.
- The name of the new Group cannot be the same as any other Group in the system.
- The new Group cannot include the same member more than once.
- External Groups are managed by an external source (LDAP, SAML, Windows Domain, etc.) so TechDoc has no control over which members are in one of these groups. Because External Groups are tightly tied to the Authenticators that maintain the memberships, only Admins can create External groups.

**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > Copy]

**Step 1:**

1. Enter the Group name in the Name box. Group names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.
2. Enter the description of the Group in the Description box. The maximum length of this field is 128 characters.
3. Enter the owner of Group in the Owner box by clicking on the down arrow and selecting a name from the list.
4. Enter type of Group in the Group Type box by clicking on the down arrow and selecting it from the list.

Type of Group	Definition
Private	Created for your use only.
Shared	Created for anyone to use.

5. Note: The Member Type field is displayed but cannot be modified.

Member Type	Definition
External Group Members	Members are externally managed by a remote authentication service (LDAP, SAML, Windows Domain, etc.) One or more Authenticators must be configured to return external group identifiers at the time TechDoc authenticates a user against that



	service to determine the user's membership in any external groups.
<b>Local Users</b>	Users that have accounts on this Document Manager.
<b>Remote Emails</b>	Email addresses.
<b>Remote Users</b>	Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that does not have a TechDoc account would use their Windows domain username.

6. Enter the Group Organization in the Organization box by clicking on the down arrow and selecting it from the Group. The Organization selected is the Organization the Group will belong to.
7. Enter the group external identifier in the External Group ID box if this is an External Group (a group that contains External Group Members). The value entered into this box depends on what group identifiers that an Authenticator returns for groups assigned to a user. For example, a Windows Domain authenticator returns the SIDS (in string value format) for the groups a user belongs to. So to create an external group referring to a Windows Domain Group, you would enter the string value for the group's SID in the box.
8. Enter the reason for copying the Group in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

Users can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Users at some point but none of the actual members have been determined yet.

Note: Available Users are Users that have a TechDoc account, on this Document Manager, and whose name does not appear in the Users on Group. Once a User's name appears in the Users on Group, the name is removed from the Available Users box.

1. Select the User in the Available Users box (on the left) to be on the Group by clicking on the name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted User to the Users on Group box. To remove a User from the Users on Group box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Users on Group box. To show Users info click on a User and click the Show User button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to copy the Group.

#### Step 3:

Remote Users are Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that does not have a TechDoc account would use their Windows domain username.

Remote Users can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Remote Users at some point but none of the actual members have been determined yet.

The Remote User fields displayed are:

- A drop down list of valid Remote Authenticators for the Document manager.
  - A text field to type in the Remote User's username.
  - An organization field to type in the Remote User's optional organization.
  - An email address field to type in the Remote User's optional email address.
1. To add a Remote User, in the New Remote User box, click on the down arrow and select a Remote Authenticator from the list. This cannot be left as Choose One. Enter a Remote username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, optionally enter the Remote User's email address. Click the Add button.
  2. To remove a Remote User, click the Remove button next to the Remote User that you would like to remove.
  3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to copy the Group.

#### Step 4:

Remote Email can be added or removed from a Group in the Document Manager.

It is permissible to have a group with no members. This might be desirable if you expect to associate some Remote Emails at some point but none of the actual members have been determined yet.

1. To add a Remote Email, in the New Remote Email box, enter the User's Remote Email address. Click the Add button.

2. To remove a Remote Email, click the Remove button next to the Remote Email that you would like to remove.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to copy the Group.

Note:

- A history record will be generated for creation of the new Group.

#### 4.17.6. Exporting the Members of a Group

Export Group Members gives the ability to export the members of a group to a file. This file can then be used for other purposes outside of TechDoc or can be imported into another group or another group on another TechDoc Document Manager instance. Often times Groups can contain hundreds or thousands of members and it can be quite time consuming syncing up the members of groups between TechDoc Document Managers manually. By using export and import, a group in one instance can be synchronized to another in just seconds.

- The User must have the Groups privilege.
- The User must have Read access to the existing Group.
- The Group cannot include the same member more than once.

**Navigation:** *[DocMgr > Groups > Select Desired Group > Side Menu > Export]*

##### **Step 1:**

1. Currently, group members can only be exported to a CSV file.
2. Select whether or not to include headings in the file by clicking on the down arrow and selecting Yes or No from the list. It's important to note, the CSV file must contain headings if it will be imported into TechDoc.
3. Click the Previous button to go back to the previous screen, or click the OK button to perform the export.

##### **Step 2:**

A message will be displayed while TechDoc begins generating the export file. After the file has been generated, the download should begin automatically.

Note: Groups with just a few members should begin downloading in just a few seconds, larger groups may take a little bit longer.

### 4.17.7. Importing the Members of a Group

Import Group Members gives the ability to import the members of a group from a file. Often times Groups can contain hundreds or thousands of members and it can be quite time consuming syncing up the members of groups between TechDoc Document Managers manually. By using export and import, a group in one instance can be synchronized to another in just seconds.

- The User must have the Groups privilege.
- The User must have Modify access to the existing Group.
- The Group cannot include the same member more than once.
- Members cannot be imported into an External Group.
- Members cannot be imported into a System Group.

**Navigation:** [*DocMgr > Groups > Select Desired Group > Side Menu > Import*]

#### Step 1:

1. Currently, group members can only be imported from a CSV file that includes headers.
2. At the File box click on the Browse... button to locate the CSV file to import from.

Note: The File Upload box will be displayed.

3. Select the operation type by clicking the down arrow and selecting an operation from the list. The operations are as follows:

<b>Merge</b>	This option will keep all of the existing group members and add all of the new members that are imported from the file.
<b>Replace</b>	This option removes all of the current group members and adds all of the new members that are imported from the file.

4. Enter a reason for importing the group members in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
5. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

A message will be displayed stating the number of members that will be imported as well as the number of entries that must be skipped because they are invalid. If an entry is invalid, the message will include the line number of the invalid entry and the reason it is invalid.

1. Click the Previous button to go back to the previous screen, click the Cancel button to cancel the command, or click the OK button to perform the import.

Notes:

- The existing group members will be updated.
- A history record will be generated for importation of members.

## 4.18. History

TechDoc stores History records for any action that is performed on any item in the system. For example, creating a Document, modifying a Folder, the date and time a User logs into the system, when a Generation is deleted, etc. At any time, the History can be reviewed to see what action was performed on an item, when the action was performed, what User performed the action, where the User logged in from, and any additional details on the action.



### 4.18.1. Showing History

Show History displays the full details of actions performed on various items in the Document Manager such as documents, folders, cabinets, organizations, etc.

History for an Attachment

**Navigation:** [DocMgr > Explorer > Select Desired Document or Generation > Side Menu > Attachments > Select Desired Attachment > History]

Document History displays the actions that were performed on a specific Attachment. This includes:

- The Date the action was performed on the Attachment.
- The Username that performed the action on the Attachment.
- The Action that was performed on the Attachment.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Attachment.

The History of the Attachment is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of an Attachment can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Attachment.

#### A Specific History Entry for an Attachment



Attachment History displays the full details of the action that was performed on a specific Attachment.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Attachment.
<b>Username</b>	The User that performed the action on the Attachment. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Attachment.
<b>Target</b>	Attachment action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Attachment. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for an Authenticator

**Navigation:** [DocMgr > Admin > Show... > Authenticators > Select Desired Authenticator > Side Menu > History]

Authenticator History displays the actions that were performed on a specific Authenticator. This includes:

- The Date the action was performed on the Authenticator.
- The Username that performed the action on the Authenticator.
- The Action that was performed on the Authenticator.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Authenticator.

Note: Only a Document Administrator can view the History of an Authenticator. The History of the Authenticator is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of an Authenticator can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.

- Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Authenticator.

### A Specific History Entry for an Authenticator



Authenticator History displays the full details of the action that was performed on a specific Authenticator. Note: Only a Document Administrator can view the History of an Authenticator.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Authenticator.
<b>Username</b>	The User that performed the action on the Authenticator. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Authenticator.
<b>Target</b>	Authenticator action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Authenticator. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Cabinet

**Navigation:** [*DocMgr > Explorer > Select Desired Cabinet > Side Menu > History*]

Cabinet History displays the actions that were performed on a specific Cabinet. This includes:

- The Date the action was performed on the Cabinet.
- The Username that performed the action on the Cabinet.
- The Action that was performed on the Cabinet.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Cabinet.

The History of the Cabinet is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are



displayed. History of a Cabinet can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Cabinet.

#### A Specific History Entry for a Cabinet

Cabinet History displays the full details of the action that was performed on a specific Cabinet.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the Cabinet.
<b>Username</b>	The User that performed the action on the Cabinet. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Cabinet.
<b>Target</b>	Cabinet action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Cabinet. Note: Details are not displayed for all actions.

<b>Reason</b>	The Reason the User gave for executing the command.
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### History for a Discussion

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Discuss/Votes > Select Desired Discussion > Side Menu > History]

Discussion History displays the actions that were performed on a specific Discussion. For example, when the Discussion was created. This includes:

- The Date the action was performed on the Discussion.
- The Username that performed the action on the Discussion.
- The Action that was performed on the Discussion.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Discussion.

The History of the Discussion is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Review can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.

- Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Discussion.

### A Specific History Entry for a Discussion



Discussion History displays the full details of the action that was performed on a specific Discussion.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Discussion.
<b>Username</b>	The User that performed the action on the Discussion. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Discussion.
<b>Target</b>	Discussion action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Discussion. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Doc Category

**Navigation:** [*DocMgr > Admin > Show... > Doc Categories > Select Desired Doc Category > Side Menu > History*]

Doc Category History displays the actions that were performed on a specific Doc Category. This includes:

- The Date the action was performed on the Doc Category.
- The Username that performed the action on the Doc Category.
- The Action that was performed on the Doc Category.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Doc Category.

Note: Only a Document Administrator can view the History of a Doc Category. The History of the Doc Category is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Doc Category can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Doc Category.

#### A Specific History Entry for a Doc Category

Doc Category History displays the full details of the action that was performed on a specific Doc Category. Note: Only a Document Administrator can view the History of a Doc Category.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the Doc Category.
<b>Username</b>	The User that performed the action on the Doc Category. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Doc Category.
<b>Target</b>	Doc Category action was performed on.

<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Doc Category. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Doc Type

**Navigation:** [\[DocMgr > Admin > Show... > Doc Types > Select Desired Doc Type > Side Menu > History\]](#)

Document Type History displays the actions that were performed on a specific Document Type. This includes:

- The Date the action was performed on the Document Type.
- The Username that performed the action on the Document Type.
- The Action that was performed on the Document Type.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Document Type.

Note: Only a Document Administrator can view the History of a Document Type. The History of the Document Type is displayed chronologically by date. Depending on what the System Property DefaultHistoryDays is set to, determines how many days of History are displayed. History of a Document Type can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
- To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
- To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
- To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.

- To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Document Type.

#### A Specific History Entry for a Doc Type

Document Type History displays the full details of the action that was performed on a specific Document Type. Note: Only a Document Administrator can view the History of a Document Type.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Document Type.
<b>Username</b>	The User that performed the action on the Document Type. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Document Type.
<b>Target</b>	Doc type action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Document Type. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.



#### History for a Document

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > History]*

Document History displays the actions that were performed on a specific Document. This includes:

- The Date the action was performed on the Document.
- The Username that performed the action on the Document Note: If (Remote User) is displayed, this indicates that this Document was fetched by someone who was not

logged in to the Document Manager. For example, a Document that was fetched from the Search Manager or from an email message.

- The Action that was performed on the Document.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Document.

The History of the Document is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Document can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Document.

### A Specific History Entry for a Document

Document History displays the full details of the action that was performed on a specific Document.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the Document.

<b>Username</b>	The User that performed the action on the Document. The User's username is displayed. Note: If (Remote User) is displayed in the Username field, this indicates that this Document was fetched by someone who was not logged in to the Document Manager. For example, a Document that was fetched from the Search Manager or from an email message.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Document.
<b>Target</b>	Document action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific Details of the action performed on the Document. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for an Employer

**Navigation:** [DocMgr > Admin > Show... > Employers > Select Desired Employer > Side Menu > History]

Employer History displays the actions that were performed on a specific Employer. This includes:

- The Date the action was performed on the Employer.
- The Username that performed the action on the Employer.
- The Action that was performed on the Employer.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Employer.

Note: Only a Document Administrator can view the History of an Employer. The History of the Employer is displayed chronologically by date. Depending on what the System Property DefaultHistoryDays is set to, determines how many days of History are displayed. History of an Employer can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.



- To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Employer.

#### A Specific History Entry for an Employer



Employer History displays the full details of the action that was performed on a specific Employer.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Employer.
<b>Username</b>	The User that performed the action on the Employer. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Employer.
<b>Target</b>	Employer action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Employer. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

## History for a Form

**Navigation:** [DocMgr > Admin > Show... > External App Credentials > Select Desired External App Credential > Side Menu > History]

External App Credentials History displays the actions that were performed on a specific External App Credential. This includes:

- The Date the action was performed on the External App Credential.
- The Username that performed the action on the External App Credential.
- The Action that was performed on the External App Credential.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the External App Credential.

The History of the External App Credential is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of an External App Credential can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the External App Credential.

## A Specific History Entry for an External App Credential



External App Credential History displays the full details of the action that was performed on a specific External App Credential.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the External App Credential.
<b>Username</b>	The User that performed the action on the External App Credential. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the External App Credential.
<b>Target</b>	External App Credential action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the External App Credential. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

History for a File Area

**Navigation:** [DocMgr > Admin > Show... > File Areas > Select Desired File Area > Side Menu > History]

File Area History displays the actions that were performed on a specific File Area. This includes:

- The Date the action was performed on the File Area.
- The Username that performed the action on the File Area.
- The Action that was performed on the File Area.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the File Area.

Note: Only a Document Administrator can view the History of a File Area. The History of the File Area is displayed chronologically by date. Depending on what the System Property DefaultHistoryDays is set to, determines how many days of History are displayed. History of a File Area can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the File Area.

#### A Specific History Entry for a File Area

File area History displays the full details of the action that was performed on a specific File Area.



Note: Only a Document Administrator can view the History of a File Area.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the File Area.
<b>Username</b>	The User that performed the action on the File Area. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the File Area.
<b>Target</b>	File area action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the File Area. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

## History for a Folder

**Navigation:** *[DocMgr > Explorer > Select Desired Folder > Side Menu > History]*

Folder History displays the actions that were performed on a specific Folder. This includes:

- The Date the action was performed on the Folder.
- The Username that performed the action on the Folder.
- The Action that was performed on the Folder.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Folder.

The History of the Folder is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Folder can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Folder.

## A Specific History Entry for a Folder



Folder History displays the full details of the action that was performed on a specific Folder.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Folder.
<b>Username</b>	The User that performed the action on the Folder. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Folder.
<b>Target</b>	Folder action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Folder. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

History for a Folder Share

**Navigation:** [DocMgr > My Work > Side Menu > Folder Shares > Select Desired Folder Share > Side Menu > History]

Folder Share History displays the actions that were performed on a specific Folder Share. For example, when the Folder Share was created, modified etc. This includes:

- The Date the action was performed on the Folder Share.
- The Username that performed the action on the Folder Share.
- The Action that was performed on the Folder Share.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Folder Share.

The History of the Folder Share is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Folder Share can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Folder Share.

#### A Specific History Entry for a Folder Share



Folder Share History displays the full details of the action that was performed on a specific Folder Share.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Folder Share.
<b>Username</b>	The User that performed the action on the Folder Share. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Folder Share.
<b>Target</b>	Folder Share action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Folder Share. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

## History for a Form

**Navigation:** [*DocMgr > Forms > Select Desired Forms > Side Menu > History*]

Forms History displays the actions that were performed on a specific Form. This includes:

- The Date the action was performed on the Form.
- The Username that performed the action on the Form.
- The Action that was performed on the Form.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Form.

The History of the Form is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Form can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Form.

## A Specific History Entry for a Form





Form History displays the full details of the action that was performed on a specific Form.

Field Name	Definition
Date	Date and time action was performed on the Form.
Username	The User that performed the action on the Form. The User's username is displayed.
IP Address	The IP address that the User's request came from.
Action	Action performed on the Form.
Target	Form action was performed on.
Secondary	The secondary target affected by the action, if there was one.
Details	Specific details of the action performed on the Form. Note: Details are not displayed for all actions.
Reason	The Reason the User gave for executing the command.

#### History for a Form Submission

**Navigation:** [DocMgr > Forms > Select Desired Form > Select Desired Form Submission > Side Menu > History]

Form Submission History displays the actions that were performed on a specific Form Submission. This includes:

- The Date the action was performed on the Form Submission.
- The Username that performed the action on the Form Submission.
- The Action that was performed on the Form Submission.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Form Submission.

The History of the Form Submission is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Form Submission can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Form Submission.

#### A Specific History Entry for a Form Submission



Form Submission History displays the full details of the action that was performed on a specific Form Submission.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Form Submission.
<b>Username</b>	The User that performed the action on the Form Submission. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Form Submission.
<b>Target</b>	Form Submission action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Form Submission. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

## History for a Group

**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > History]

Group History displays the actions that were performed on a specific Group. This includes:

- The Date the action was performed on the Group.
- The Username that performed the action on the Group.
- The Action that was performed on the Group.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Group.

The History of the Group is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Group can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Group.

## A Specific History Entry for a Group



Group History displays the full details of the action that was performed on a specific Group.

Field Name	Definition
Date	Date and time action was performed on the Group.
Username	The User that performed the action on the Group. The User's username is displayed.
IP Address	The IP address that the User's request came from.
Action	Action performed on the Group.
Target	Group action was performed on.
Secondary	The secondary target affected by the action, if there was one.
Details	Specific details of the action performed on the Group. Note: Details are not displayed for all actions.
Reason	The Reason the User gave for executing the command.

History for a Keyword

**Navigation:** [DocMgr > Admin > Show... > Keywords > Select Desired Keyword > Side Menu > History]

Keyword History displays the actions that were performed on a specific Keyword. This includes:

- The Date the action was performed on the Keyword.
- The Username that performed the action on the Keyword.
- The Action that was performed on the Keyword.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Keyword.

Note: Only a Document Administrator can view the History of a Keyword. The History of the Keyword is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Keyword can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Keyword.

#### A Specific History Entry for a Keyword

Keyword History displays the full details of the action that was performed on a specific Keyword. Note: Only a Document Administrator can view the History of Keyword.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Keyword.
<b>Username</b>	The User that performed the action on the Keyword. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Keyword.
<b>Target</b>	Keyword action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Keyword. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

## History for a Mail Message



Mail Message History displays the full details of the action that was performed on Mail Messages. Note: Only a Document Administrator can view the History of Mail Messages.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Mail Message.
<b>Username</b>	The User that performed the action on the Mail Message. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Mail Message.
<b>Target</b>	Mail Messages.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Mail Message. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

## History for a Mail Receiver

**Navigation:** [DocMgr > My Work > Side Menu > Receivers > Select Desired Mail Receiver > Side Menu > History]

Mail Receivers History displays the actions that were performed on a specific Mail Receiver. This includes:

- The Date the action was performed on the Mail Receiver.
- The Username that performed the action on the Mail Receiver.
- The Action that was performed on the Mail Receiver.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Mail Receiver.

The History of the Mail Receiver is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Mail Receiver can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Mail Receiver.

#### A Specific History Entry for a Mail Receiver

Mail Receiver History displays the full details of the action that was performed on a specific Mail Receiver.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Mail Receiver.
<b>Username</b>	The User that performed the action on the Mail Receiver. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Mail Receiver.
<b>Target</b>	Mail Receiver action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.



<b>Details</b>	Specific details of the action performed on the Mail Receiver. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Metric Organization

**Navigation:** [DocMgr > Admin > Show... > Metric Organizations > Select Desired Metric Organization > Side Menu > History]

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Metric Organization History displays the actions that were performed on a specific Metric Organization. For example, when the Metric Organization was created, modified etc. This includes:

- The Date the action was performed on the Metric Organization.
- The Username that performed the action on the Metric Organization.
- The Action that was performed on the Metric Organization.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Metric Organization.

The History of the Metric Organization is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Metric Organization can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
- To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
- To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
- To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.



- To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Metric Organization.

#### A Specific History Entry for a Metric Organization

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Metric Organization History displays the full details of the action that was performed on a specific Metric Organization.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the Metric Organization.
<b>Username</b>	The User that performed the action on the Metric Organization. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Metric Organization.
<b>Target</b>	Metric Organization action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Metric Organization. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for a Metric Person

**Navigation:** [*DocMgr > Admin > Show... > Metric People > Select Desired Metric Person > Side Menu > History*]

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Metric Person History displays the actions that were performed on a specific Metric Person. For example, when the Metric Person was created, modified etc. This includes:

- The Date the action was performed on the Metric Person.
- The Username that performed the action on the Metric Person.
- The Action that was performed on the Metric person.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Metric Person.

The History of the Metric Person is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Metric Person can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Metric Person.

#### A Specific History Entry for a Metric Person

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Metric Person History displays the full details of the action that was performed on a specific Metric Person.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the Metric Person.
<b>Username</b>	The User that performed the action on the Metric Person. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Metric Person.
<b>Target</b>	Metric Person action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Metric Person. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for a Metric Type

**Navigation:** [DocMgr > Admin > Show... > Metric Types > Select Desired Metric Type > Side Menu > History]

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Metric Type History displays the actions that were performed on a specific Metric type. For example, when the Metric Type was created, modified etc. This includes:

- The Date the action was performed on the Metric Type.
- The Username that performed the action on the Metric Type.
- The Action that was performed on the Metric type.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Metric Type.

The History of the Metric Type is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are

displayed. History of a Metric Type can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Metric Type.

#### A Specific History Entry for a Metric Type

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Metric Type History displays the full details of the action that was performed on a specific Metric Type.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the Metric Type.
<b>Username</b>	The User that performed the action on the Metric Type. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Metric Type.
<b>Target</b>	Metric Type action was performed on.

<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Metric Type. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Mime Type

**Navigation:** [DocMgr > Admin > Show... > Mime Types > Select Desired Mime Type > Side Menu > History]

Mime type History displays the actions that were performed on a specific Mime Type. This includes:

- The Date the action was performed on the Mime Type.
- The Username that performed the action on the Mime Type.
- The Action that was performed on the Mime Type.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Mime Type.

Note: Only a Document Administrator can view the History of a Mime Type. The History of the Mime Type is displayed chronologically by date. Depending on what the System Property DefaultHistoryDays is set to, determines how many days of History are displayed. History of a Mime Type can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
- To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
- To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
- To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
- To display all History under Show History with in the Date Range box leave both date fields blank.

1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
2. Enter the desired date(s) in the Date Range boxes.
3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Mime Type.

#### A Specific History Entry for a Mime Type

Mime type History displays the full details of the action that was performed on a specific Mime Type. Note: Only a Document Administrator can view the History of a Mime Type.


Field Name	Definition
<b>Date</b>	Date and time action was performed on the Mime Type.
<b>Username</b>	The User that performed the action on the Mime Type. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Mime Type.
<b>Target</b>	Mime type action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Mime Type. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for a Network Address

**Navigation:** [[DocMgr](#) > [Admin](#) > [Show...](#) > [Network Addresses](#) > [Select Desired Network Address](#) > [Side Menu](#) > [History](#)]

Network Address History displays the actions that were performed on a specific Network Address. This includes:

- The Date the action was performed on the Network Address.
- The Username that performed the action on the Network Address.
- The Action that was performed on the Network Address.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.

- Click on  or  to View History Details of the Network Address.

Note: Only a Document Administrator can view the History of a Network Address. The History of the Network Address is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Network Address can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Network Address.

#### A Specific History Entry for a Network Address

Network Address History displays the full details of the action that was performed on a specific Network Address. Note: Only a Document Administrator can view the History of a Network Address.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the Network Address.
<b>Username</b>	The User that performed the action on the Network Address. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.

<b>Action</b>	Action performed on the Network Address.
<b>Target</b>	Network address action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Network Address. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for an Organization

**Navigation:** [DocMgr > Admin > Show... > Organizations > Select Desired Organization > Side Menu > History]

Organization History displays the actions that were performed on a specific Organization. This includes:

- The Date the action was performed on the Organization.
- The Username that performed the action on the Organization.
- The Action that was performed on the Organization.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Organization.

Note: Only a Document Administrator can view the History of an Organization. The History of the Organization is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of an Organization can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
- To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
- To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.



- To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Organization.

### A Specific History Entry for an Organization

Organization History displays the full details of the action that was performed on a specific Organization. Note: Only a Document Administrator can view the History of an Organization.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Organization.
<b>Username</b>	The User that performed the action on the Organization. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Organization.
<b>Target</b>	Organization action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Organization. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.



### History for a Project

**Navigation:** [*DocMgr > Projects > Select Desired Project > Side Menu > History*]

Project History displays the actions that were performed on a specific Project. This includes:

- The Date the action was performed on the Project.
- The Username that performed the action on the Project.

- The Action that was performed on the Project.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.

- Click on  or  to View History Details of the Project.

The History of the Project is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Project can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Project.

### A Specific History Entry for a Project

Project History displays the full details of the action that was performed on a specific Project.

Field Name	Definition
Date	Date and time action was performed on the Project.
Username	The User that performed the action on the Project. The User's username is displayed.

<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Project.
<b>Target</b>	Project action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Project. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Queued Command

Note: This help will only be displayed if this system supports Queued Commands.

Queued command History displays the full details of the action that was performed on Queued Command. Note: Only a Document Administrator can view the History of Queued Commands.

<b>Field Name</b>	<b>Definition</b>
<b>Date</b>	Date and time action was performed on the Queued Command.
<b>Username</b>	The User that performed the action on the Queued Command. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Queued Command.
<b>Target</b>	Queued Commands.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Queued Commands. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Render Request



Render Request History displays the full details of the action that was performed on Render Request. Note: Only a Document Administrator can view the History of render requests.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Render Request.
<b>Username</b>	The User that performed the action on the Render Request. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Render Request.
<b>Target</b>	Render Requests.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Render Requests. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for a Review

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > History]

Review History displays the actions that were performed on a specific Review. For example, when the Review was created, started, paused etc. This includes:

- The Date the action was performed on the Review.
- The Username that performed the action on the Review.
- The Action that was performed on the Review.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Review.

The History of the Review is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Review can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Review.

#### A Specific History Entry for a Review



Review History displays the full details of the action that was performed on a specific Review.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Review.
<b>Username</b>	The User that performed the action on the Review. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Review.
<b>Target</b>	Review action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Review. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Review Team

**Navigation:** [DocMgr > Reviews > Side Menu > All/My/Shared Teams > Select Desired Review Team > Side Menu > History]

Review Team History displays the actions that were performed on a specific Review Team. This includes:

- The Date the action was performed on the Review Team.
- The Username that performed the action on the Review Team.
- The Action that was performed on the Review Team.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Review Team.

The History of the Review Team is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Review Team can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Review Team.

### A Specific History Entry for a Review Team



Review Team History displays the full details of the action that was performed on a specific Review Team.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Review Team.
<b>Username</b>	The User that performed the action on the Review Team. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Review Team.
<b>Target</b>	Review Team action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Review Team. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for an RMA File Plan

**Navigation:** [DocMgr > Records > Show... > RMA Files Plans > Select Desired RMA File Plan > Side Menu > History]

RMA File Plan History displays the actions that were performed on a specific RMA File Plan. For example, when the RMA File Plan was created, modified etc. This includes:

- The Date the action was performed on the RMA File Plan.
- The Username that performed the action on the RMA File Plan.
- The Action that was performed on the RMA File Plan.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the RMA File Plan.

The History of the RMA File Plan is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are

displayed. History of a RMA File Plan can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the RMA File Plan.

#### A Specific History Entry for an RMA File Plan

RMA File Plan History displays the full details of the action that was performed on a specific RMA File Plan.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the RMA File Plan.
<b>Username</b>	The User that performed the action on the RMA File Plan. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the RMA File Plan.
<b>Target</b>	RMA File Plan action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.





<b>Details</b>	Specific details of the action performed on the RMA File Plan. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for an RMA Keyword

**Navigation:** [DocMgr > Records > Show... > RMA Keywords > Select Desired RMA Keyword > Side Menu > History]

RMA Keyword History displays the actions that were performed on a specific RMA Keyword. For example, when the RMA Keyword was created, modified etc. This includes:

- The Date the action was performed on the RMA Keyword.
- The Username that performed the action on the RMA Keyword.
- The Action that was performed on the RMA Keyword.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the RMA Keyword.

The History of the RMA Keyword is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a RMA Keyword can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
- To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
- To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
- To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
- To display all History under Show History with in the Date Range box leave both date fields blank.

1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
2. Enter the desired date(s) in the Date Range boxes.
3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the RMA Keyword.

#### A Specific History Entry for an RMA Keyword

RMA Keyword History displays the full details of the action that was performed on a specific RMA Keyword.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the RMA Keyword.
<b>Username</b>	The User that performed the action on the RMA Keyword. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the RMA Keyword.
<b>Target</b>	RMA Keyword action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the RMA Keyword. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for an RMA Record

**Navigation:** [DocMgr > Explorer > Select Desired Document > Side Menu > Records > Select Desired RMA Record > Side Menu > History]

RMA Record History displays the actions that were performed on a specific RMA Record. For example, when the RMA Record was created, modified etc. This includes:

- The Date the action was performed on the RMA Record.
- The Username that performed the action on the RMA Record.
- The Action that was performed on the RMA Record.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.

- Click on  or  to View History Details of the RMA Record.

The History of the RMA Record is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a RMA Record can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the RMA Record.

#### A Specific History Entry for an RMA Record

RMA Record History displays the full details of the action that was performed on a specific RMA Record.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the RMA Record.
<b>Username</b>	The User that performed the action on the RMA Record. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the RMA Record.

<b>Target</b>	RMA Record action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the RMA Record. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for an RMA Records Set

**Navigation:** [DocMgr > Records > Show... > RMA Records Sets > Select Desired RMA Records Set > Side Menu > History]

RMA Record Set History displays the actions that were performed on a specific RMA Record Set. For example, when the RMA Record Set was created, modified etc. This includes:

- The Date the action was performed on the RMA Record Set.
- The Username that performed the action on the RMA Record Set.
- The Action that was performed on the RMA Record Set.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the RMA Record Set.

The History of the RMA Record Set is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a RMA Record Set can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
- To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
- To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
- To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.

- To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the RMA Record Set.

#### A Specific History Entry for an RMA Records Set

RMA Record Set History displays the full details of the action that was performed on a specific RMA Record Set.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the RMA Record Set.
<b>Username</b>	The User that performed the action on the RMA Record Set. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the RMA Record Set.
<b>Target</b>	RMA Record Set action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the RMA Record Set. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for a Search Manager Host

**Navigation:** *[DocMgr > Admin > Show... > Search Manager Hosts > Select Desired Search Manager Host > Side Menu > History]*

Search Manager Host History displays the actions that were performed on a specific Search Manager Host. This includes:

- The Date the action was performed on the Search Manager Host.
- The Username that performed the action on the Search Manager Host.
- The Action that was performed on the Search Manager Host.

- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Search Manager host.

Note: Only a Document Administrator can view the History of a Search Manager Host. The History of the Search Manager Host is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Search Manager Host can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Search Manager Host.

### A Specific History Entry for a Search Manager Host

Search Manager History displays the full details of the action that was performed on a specific Search Manager Host. Note: Only a Document Administrator can view the History of a Search Manager Host.

Field Name	Definition
Date	Date and time action was performed on the Search Manager Host.

<b>Username</b>	The User that performed the action on the Search Manager Host. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Search Manager Host.
<b>Target</b>	Search Manager Host action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Search Manager Host. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for a Search Manager Update

Search Manager Update History displays the full details of the action that was performed on Search Manager Update. Note: Only a Document Administrator can view the History of Search Manager Updates.

<b>Field Name</b>	<b>Definition</b>
<b>Date</b>	Date and time action was performed on the Search Manager Updates.
<b>Username</b>	The User that performed the action on the Search Manager Updates. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Search Manager Updates.
<b>Target</b>	Search Manager Updates.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Search Manager Updates. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

#### History for a System Property



System Property History displays the full details of the action that was performed on System Properties. Note: Only a Document Administrator can view the History of System Properties.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the System Properties.
<b>Username</b>	The User that performed the action on the System Properties. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the System Properties.
<b>Target</b>	System Properties.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the System Properties. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

History for a User

**Navigation:** [*DocMgr > Admin > Show... > Users > Select Desired User > Side Menu > History*]

User History displays the actions that were performed on a specific User. This includes:

- The Date the action was performed on the User.
- The Username that performed the action on the User.
- The Action that was performed on the User.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the User.

The History of the User is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a User can be displayed for a specific date, a range of dates, or all the History.



- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the User.

#### A Specific History Entry for a User

Note: The title of this screen will vary depending on how you navigated to this page. The title may be My History or History of User.

User History displays the full details of the action that was performed on a specific User.



Field Name	Definition
<b>Date</b>	Date and time action was performed on the User.
<b>Username</b>	The User that performed the action on the User. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the User.
<b>Target</b>	User action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific Details of the action performed on the User. Note: Details are not displayed for all actions.

<b>Reason</b>	The Reason the User gave for executing the command.
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### History for a Workflow Deployment

**Navigation:** [DocMgr > Workflows > Side Menu > Deployments > Select Desired Deployment > Side Menu > History]

Workflow Deployment History displays the actions that were performed on a specific Workflow Deployment. This includes:

- The Date the action was performed on the Workflow Deployment.
- The Username that performed the action on the Workflow Deployment.
- The Action that was performed on the Workflow Deployment.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Workflow Deployment.

The History of the Workflow Deployment is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Workflow Deployment can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.

- Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Workflow Deployment.

### A Specific History Entry for a Workflow Deployment



Workflow Deployment History displays the full details of the action that was performed on a specific Workflow Deployment.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Workflow Deployment.
<b>Username</b>	The User that performed the action on the Workflow Deployment. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Workflow Deployment.
<b>Target</b>	Workflow Deployment action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.
<b>Details</b>	Specific details of the action performed on the Workflow Deployment. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

### History for a Workflow Process Trigger

**Navigation:** [DocMgr > Workflows > Side Menu > Process Triggers > Select Desired Process Trigger > Side Menu > History]

Workflow Process Trigger History displays the actions that were performed on a specific Workflow Process Trigger. This includes:

- The Date the action was performed on the Workflow Process Trigger.
- The Username that performed the action on the Workflow Process Trigger.
- The Action that was performed on the Workflow Process Trigger.
- The Details of the action performed. Note: Details are not displayed for all actions.
- The Reason the User gave for executing the command.
- The number of actions is shown.
- Click on  or  to View History Details of the Workflow Process Trigger.

The History of the Workflow Process Trigger is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History of a Workflow Process Trigger can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show History with in the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show History with in the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show History with in the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show History with in the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show History with in the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter the desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History of the Workflow Process Trigger.

#### A Specific History Entry for a Workflow Process Trigger

Workflow Process Trigger History displays the full details of the action that was performed on a specific Workflow Process Trigger.

Field Name	Definition
<b>Date</b>	Date and time action was performed on the Workflow Process Trigger.
<b>Username</b>	The User that performed the action on the Workflow Process Trigger. The User's username is displayed.
<b>IP Address</b>	The IP address that the User's request came from.
<b>Action</b>	Action performed on the Workflow Process Trigger.
<b>Target</b>	Workflow Process Trigger action was performed on.
<b>Secondary</b>	The secondary target affected by the action, if there was one.

<b>Details</b>	Specific details of the action performed on the Workflow Process Trigger. Note: Details are not displayed for all actions.
<b>Reason</b>	The Reason the User gave for executing the command.

## 4.19. Logging In and Logging Out

TechDoc provides several capabilities related to logging in and out. On a system that supports Single Sign-On, the Switch User option is available. This allows a User to specifically pick which User to log in as, rather than having the system automatically log them into their primary TechDoc account.

### 4.19.1. Log In

Log In logs a User in and redirects the User to their default Folder in the Explorer.

If a User is remotely authenticated and they enter the wrong password, it is possible for them to disable their account on the remote authentication server. If this happens, the User must contact the help desk for the remote authentication server to get their access re-enabled.

- If the User is already logged in, they are simply redirected to their default Folder.
- If the User is not logged in:
  - The AllowLogInFrom System Property and User's current IP address are examined to determine if the User is attempting to log in from a valid IP address. If not, the log in fails.
  - If the system has Single Sign-On (SSO) enabled and the User currently has a valid SSO session that is tied to their TechDoc account, the User will automatically be logged into that TechDoc account and redirected to their default Folder.
  - The DefaultAuthenticator System Property determines if the User is automatically sent to the Single Sign-On (SSO) in an attempt to establish a valid SSO session to log the User in by.
  - The User will be prompted to use SSO and/or enter their username and password, depending on system settings and whether a valid SSO session could be used to automatically log the User in first.
  - If the username belongs to a guest account, the log in fails.
  - If the SystemAvailable System Property is set to No and the account is a non-Admin account, the log in fails.
  - If the User's current IP address is a restricted IP address and the account is not a restricted User account, the log in fails.
  - If the User account is expired, the log in fails.
  - If the User account is disabled, the log in fails.

- If the User is locally authenticated, the password is encrypted and checked against the one stored in TechDoc. If the User is remotely authenticated, the username and password are sent to the remote authentication service for validation. If the password validation fails for either type of authentication, the log in fails.
- If the User is locally authenticated and their TechDoc password is expired, the User is prompted to enter a new password. The new password must meet the password restriction System Properties.

**Navigation:** [*DocMgr > Log In*]

If TechDoc has Single Sign-On (SSO) enabled and you wish to use it:

1. Click the Log In button for the SSO service that you wish to log in with.
2. After you are redirected to the SSO service, perform the steps that it requires to complete the log in process.

OR

If TechDoc has non-Single Sign-Ons enabled and you have a non-SSO username and password that you wish to use:

1. Enter your username in the Username box.
2. Enter your password in the Password box. The password is displayed as "\*\*\*\*\*".
3. Click the Cancel button to cancel the command, or click the OK button to log in.

Notes:

- If you have a username and password that is for use on an SSO server, you cannot enter them into the username and password boxes on the TechDoc log in screen. Instead, you must click the Log In button and enter the information on the SSO server.
- Passwords are case sensitive.
- Click the Support link for support on this system.

Expired Password

If your password has expired, you must change your password before you will be allowed to log into the Document Manager.

1. Enter your old password in the Old Password box. The password is displayed as "\*\*\*\*\*".
2. Enter your new password in the New Password box. The password is displayed as "\*\*\*\*\*". Note: The password must be at least 8 characters long. The password must contain at least 3 of the 4 different types of characters. The four types of characters are

uppercase letter, lowercase letter, digit, and special character. (Passwords must adhere to the settings in System Properties for password requirements)

3. Re-enter your new password in the Verify Password box. The password is displayed as "\*\*\*\*\*". The new password and the verify password must match.
4. Click the Cancel button to cancel the command, or click the OK button to change your password and log in.

#### Notes:

- Passwords are case sensitive.
- Click the Support link for support on this system.

#### Log In Error Messages

- This User account has been disabled because the password has been expired for more than xx days. Click on 'Forgot your password?' to reset your password.
- This User account has been disabled due to the password being expired. Click on 'Forgot your password?' to reset your password.
- This User account has been disabled due to too many failed login attempts. Click on 'Forgot your password?' to reset your password.
- This User account has expired.
- This User account has been disabled.
- This User account is a guest account and cannot be used for log in purposes.
- An invalid username and/or password were entered.
  - Password is case sensitive.
  - Verify that Username and/or Password were entered correctly.
  - The password must be at least 8 characters long. (Password must adhere to the settings in System Properties for password requirements)
  - The password must contain at least 3 of the 4 different types of characters. The four types of characters are uppercase letter, lowercase letter, digit, and special character. (Password must adhere to the settings in System Properties for password requirements)
  - After 3 failed login attempts, your account will be disabled. The PasswordBreakIn System Property determines the actual number of failed attempts that are allowed.

Click the Support link for support on this system.

#### Note:

- Once logged in, the User is redirected to their default Folder in the Explorer.
- Once logged in, the number of unsuccessful logins will be reset to zero.
- If a new password was requested and accepted, the password expiration date is reset based on the PasswordLifeTime System Property.

- If the log in fails, the number of unsuccessful logins on the account will be incremented. If the number of unsuccessful attempts is greater than the PasswordBreakIn System Property and the User is locally authenticated, the User will be Password disabled. If the User is remotely authenticated, the remote system is responsible for disabling the User or taking whatever action is appropriate for that service.
- If there are repeated log in failures, alerts are sent to the owner of the account and the Users in the Alert Group to notify them in case an attack on the system might be under way. The alerts are sent after the PasswordBreakIn System Property number of failures. After the first alert on an account, alerts are sent out every the PasswordBreakIn System Property \* 2 number of failures. For example, if the PasswordBreakIn System Property is set to 3, alerts would be sent after failed attempt number 3, 6, 12, 18, 24, 30...
- A history record will be generated for the log in whether successful or not.
- A message will be generated in the TechDoc log for the log in whether successful or not.

### 4.19.2. Log Out

Log Out logs you out of the Document Manager.

**Navigation:** *[DocMgr > Log Out]*

If you are currently logged in through an SSO (Single Sign-On) server, you may be asked if you wish to log out of SSO too. If so, click the No button to just log out of the Document Manager. Otherwise, click the Yes button to log out of the Document Manager and the SSO server.

For additional security, you should always close your browser window after logging out of any web-based application.

### 4.19.3. Switch User

Switch User logs a User in and redirects the User to their default Folder in the Explorer. Unlike Log In, Switch User never attempts to automatically log a User in. This gives you the chance to specify exactly which TechDoc account that you wish to log into.

If a User is remotely authenticated and they enter the wrong password, it is possible for them to disable their account on the remote authentication server. If this happens, the User must contact the help desk for the remote authentication server to get their access re-enabled.

- If the User is already logged in, they are simply redirected to their default Folder.
- If the User is not logged in:
  - The AllowLogInFrom System Property and User's current IP address are examined to determine if the User is attempting to log in from a valid IP address. If not, the log in fails.
  - The User will be prompted to use SSO and/or enter their username and password, depending on system settings.



- If the username belongs to a guest account, the log in fails.
- If the SystemAvailable System Property is set to No and the account is a non-Admin account, the log in fails.
- If the User's current IP address is a restricted IP address and the account is not a restricted User account, the log in fails.
- If the User account is expired, the log in fails.
- If the User account is disabled, the log in fails.
- If the User is locally authenticated, the password is encrypted and checked against the one stored in TechDoc. If the User is remotely authenticated, the username and password are sent to the remote authentication service for validation. If the password validation fails for either type of authentication, the log in fails.
- If the User is locally authenticated and their TechDoc password is expired, the User is prompted to enter a new password. The new password must meet the password restriction System Properties.

**Navigation:** *[DocMgr > Switch User]*

If TechDoc has Single Sign-On (SSO) enabled and you wish to use it:

1. Click the Log In button for the SSO service that you wish to log in with.
2. After you are redirected to the SSO service, perform the steps that it requires to complete the log in process.

OR

If TechDoc has non-Single Sign-Ons enabled and you have a non-SSO username and password that you wish to use:

1. Enter your username in the Username box.
2. Enter your password in the Password box. The password is displayed as "\*\*\*\*\*".
3. Click the Cancel button to cancel the command, or click the OK button to log in.

Notes:

- If you have a username and password that is for use on an SSO server, you cannot enter them into the username and password boxes on the TechDoc log in screen. Instead, you must click the Log In button and enter the information on the SSO server.
- Passwords are case sensitive.
- Click the Support link for support on this system.

Expired Password

If your password has expired, you must change your password before you will be allowed to log into the Document Manager.

1. Enter your old password in the Old Password box. The password is displayed as "\*\*\*\*\*".
2. Enter your new password in the New Password box. The password is displayed as "\*\*\*\*\*". Note: The password must be at least 8 characters long. The password must contain at least 3 of the 4 different types of characters. The four types of characters are uppercase letter, lowercase letter, digit, and special character. (Passwords must adhere to the settings in System Properties for password requirements)
3. Re-enter your new password in the Verify Password box. The password is displayed as "\*\*\*\*\*". The new password and the verify password must match.
4. Click the Cancel button to cancel the command, or click the OK button to change your password and log in.

#### Notes:

- Passwords are case sensitive.
- Click the Support link for support on this system.

#### Switch User Error Messages

- This User account has been disabled because the password has been expired for more than xx days. Click on 'Forgot your password?' to reset your password.
- This User account has been disabled due to the password being expired. Click on 'Forgot your password?' to reset your password.
- This User account has been disabled due to too many failed login attempts. Click on 'Forgot your password?' to reset your password.
- This User account has expired.
- This User account has been disabled.
- This User account is a guest account and cannot be used for log in purposes.
- An invalid username and/or password were entered.
  - Password is case sensitive.
  - Verify that Username and/or Password were entered correctly.
  - The password must be at least 8 characters long. (Password must adhere to the settings in System Properties for password requirements)
  - The password must contain at least 3 of the 4 different types of characters. The four types of characters are uppercase letter, lowercase letter, digit, and special character. (Password must adhere to the settings in System Properties for password requirements)
  - After 3 failed login attempts, your account will be disabled. The PasswordBreakIn System Property determines the actual number of failed attempts that are allowed.

Click the Support link for support on this system.

Note:

- Once logged in, the User is redirected to their default Folder in the Explorer.
- Once logged in, the number of unsuccessful logins will be reset to zero.
- If a new password was requested and accepted, the password expiration date is reset based on the PasswordLifeTime System Property.
- If the log in fails, the number of unsuccessful logins on the account will be incremented. If the number of unsuccessful attempts is greater than the PasswordBreakIn System Property and the User is locally authenticated, the User will be Password disabled. If the User is remotely authenticated, the remote system is responsible for disabling the User or taking whatever action is appropriate for that service.
- If there are repeated log in failures, alerts are sent to the owner of the account and the users on the alert group to notify them in case an attack on the system might be under way. The alerts are sent after the PasswordBreakIn System Property number of failures. After the first alert on an account, alerts are sent out every PasswordBreakIn System Property \* 2 number of failures. For example, if the PasswordBreakIn System Property is set to 3, alerts would be sent after failed attempt number 3, 6, 12, 18, 24, 30...
- A history record will be generated for the log in whether successful or not.
- A message will be generated in the TechDoc log for the log in whether successful or not.

#### **4.19.4. Fast Switch**

Fast Switch allows a logged in user to quickly switch from one TechDoc account to another. In order to use fast switching, the current user must be logged into a TechDoc account that is remotely authenticated and there must be more than one TechDoc account on the server that maps to the same remotely authenticated user. If these conditions are not met, the user must log out and log back in with different credentials to switch users.

Once a user successfully fast switches to another TechDoc user, the system remembers the new TechDoc user as the preferred TechDoc user to use with the current user credentials. This is particularly helpful in Single Sign-On environments. If a user waits too long to perform a command, the user's TechDoc session could time out. On clicking a button to perform the command, the user could be silently single signed back on. If TechDoc did not remember the last user that was used, the command could accidentally be performed using the wrong TechDoc user account.

#### **4.19.5. Forgot Password**

Have you ever forgotten your password and do not know who to call to have it reset? With Forgot Password, you can reset your own password without having to make any phone calls requesting to have it reset.

If a TechDoc User account is assigned to a remote Authenticator, the Forgot Password feature will not be available. In this case, the User must go to the remote authentication server to reset their password.

A valid username and the correct answer to the security question is all you need. If properly entered, the system will generate a new random password and email it to the email address stored in the system for the specified User. One email is sent to the User stating that their account has been reset and a second separate email is sent with the new password. Once you receive the emails, you will be able to log in and change your password.

- A valid username must be given.
- The correct answer to the security question must be given.
- The disable flag on the User account cannot be set to Yes.
- The User account cannot be a Guest Only account.
- The User account cannot be expired.
- The AllowForgotPassword System Property must be set to Yes.
- The User cannot be assigned to a remote Authenticator. The Forgot Password feature is not available and the User will need to go to the remote authentication server to reset their password.

**Navigation:** *[DocMgr > Log In or Switch User > Forgot your password]*

**Step 1:**

1. Enter your username in the Username box.
2. Enter your security answer in the Security Answer box. This is a required field. The maximum length of this field is 32 characters. The security answer is not case sensitive.
3. Click the Cancel button to cancel the command, or click the OK button to reset password.

If you have forgotten your username and/or security answer or receive one of the following error messages, contact your local help desk or Document Administrator. For contact information, click the Support link.

- The correct answer to the security question must be given.
- The specified username can only be reset by contacting the document administrator for this system.
- The Forgot Password feature is not allowed on this User because the account has expired.
- The Forgot Password feature is not allowed on this User because the account has been disabled.
- The Forgot Password feature is not allowed on this User because the account is a guest account.

**Step 2:**

A new password has been generated and sent to the email address for this specific User. Once you receive the email, follow the directions to access this system. If you need further assistance, contact your local help desk or Document Administrator. For contact information, click the Support link.

**Notes:**

- The User's password is set to a randomly generated password according to the System Property settings for passwords.
- The User's disabled flag is set to No.
- The User's login failure count is set to zero.
- One email is sent to the User stating that their account has been reset and a second separate email is sent with the new password.
- A history record will be generated for modification of User.

## 4.20. Mail Receivers

Mail Receivers accept connections from SMTP clients and create documents from the received emails into the folder that a Mail Receiver is associated with. They can receive email anonymously or require SMTP client to authenticate using specific External App Credentials.

### 4.20.1. Creating a Mail Receiver

Create Mail Receiver creates a new Mail Receiver. Mail Receivers accept connections from SMTP clients and create documents from the received emails. Optionally, External App Credentials are used to force SMTP clients to authenticate before the Mail Receiver will accept email from them.

- To create a Mail Receiver, you must have the Mail Receivers privilege.
- You must have Create Document access to the parent Folder.
- The Name cannot be the same as any other Mail Receiver's Name in the system.

**Navigation:** [*DocMgr > Explorer > Navigate to Desired Folder > Side Menu > Receivers > Side Menu > Create*]

**Step 1:**

1. Enter the name for this receiver in the Name box. A Name must be unique within the same Document Manager. This is a required field. The maximum length of the field is 64 characters. Note: The Name must conform to the rules for the local-part as described in RFC-2822. Generally, this means the following letters may be used: A-Z, a-z, 0-9, and the

special characters `!#$%&'*+,-/=/?^_`{|}~`

For more specifics, RFC-2822 should be consulted.

2. Optionally enter a description for this receiver in the Description box. The maximum length of this field is 255 characters.
3. Enter a doc number mask for this receiver in the Doc Number Mask box. The maximum length of this field is 255 characters. The mask format uses the following codes: %H - hour, %M - minute, %S - second, %L - milliseconds, %m - month, %d - day, %y - year, %Y - short year, %u - username, %# - number, add #s for more digits. For example, to create a doc numbering mask that would produce documents number formatted as year-month-day followed by sequential numbers (i.e. 2016-11-01-0001, 2016-11-01-0002, etc.) you would enter %y-%m-%d-%##### where the %y represents the year, the %m represents the month, the %d represents the day, and the %##### represents enough decimal places for up to 9999 documents. If you need more or less documents, add or remove additional # characters.
4. Optionally enter the title to use for documents created by this receiver in the Title box. The maximum length of this field is 1000 characters. JUEL expressions may be embedded in the title. JUEL expressions begin with `${` and end with `}`. The most common JUEL expression to use for the title is `${mail.getHeader("subject", "No Subject")}` which uses the subject of the email as the title. Otherwise, the phrase No Subject is used as the title.
5. Optionally enter the point of contact to use for documents created by this receiver in the Point of Contact box. The maximum length of this field is 48 characters. JUEL expressions may be embedded in the point of contact. JUEL expressions begin with `${` and end with `}`. The most common JUEL expression to use for the point of contact is `${mail.getHeader("from", "No From")}` which uses the from address of the email as the point of contact. Otherwise, the phrase No From is used as the point of contact.
6. Select whether this receiver allows anonymous access or not in the Anonymous Access box's list. If not, email will only be accepted from SMTP clients that provide valid credentials that are associated to this Mail Receiver.
7. Select the document source to be used for this receiver in the Document Source box's list. The following choices are available:
  - Whole Email - The whole email will be used for the document.
  - Attachments Only - Each attachment will be used to create a separate document. If no attachments are present, nothing will be created.
  - Attachments Else Whole Email - Each attachment will be used to create a separate document. If no attachments are present, the email will be used to create a document.
8. Select whether this receiver should include the email on attachments saved as documents or not in the Include Email box's list. If Yes is chosen, when an attachment is saved as a document, the main email will be saved attached to that document.
9. Select the Doc Category that will be used for documents created by this Mail Receiver in the Doc Category box by clicking on the down arrow and selecting it from the list.

10. Select the Doc Type that will be used for documents created by this Mail Receiver in the Doc Type box by clicking on the down arrow and selecting it from the list.
11. Select the Organization that will be used for documents created by this Mail Receiver in the Organization box by clicking on the down arrow and selecting it from the list.
12. Select the owner of documents created by this receiver in the Owner box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign an owner.
13. Select the highest web search for documents created by this receiver in the Web Search box by clicking on the down arrow and selecting it from the list.

Web Search	Definition
<b>No</b>	Document attributes are not sent to the Search Manager(s). The Document is not searchable from the Search Manager(s). The Document is searchable on the Document Manager.
<b>Community</b>	The Document is searchable via the web to anyone within the organization and partner IP addresses.
<b>Global</b>	The Document is available to anyone anywhere on the World Wide Web.

14. Enter a reason for creating the Mail Receiver in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
15. Click the Cancel button to cancel the command or click the Next button to continue.

#### Step 2:

External App Credentials may be assigned to a Mail Receiver to determine credentials that must be used by SMTP clients to restrict who can send emails to the Mail Receiver.

1. Determine the appropriate credentials to allow access to by selecting them from the Available box and clicking the Add button. You can also select credentials in the Allowed Access box and click the Remove button or the Remove All button to remove access from them to this Mail Receiver. If Anonymous Access was set to No on the previous screen, the Credentials field simple shows a message that no credentials can be assigned.
2. To save this Mail Receiver and create another one click the box next to "Save this Mail Receiver and Create Another". This will place a check in the box. If you do not want to create another receiver, leave the box blank.
3. Click the Previous button to go back to the previous screen, click the Cancel button to cancel the command, or click the OK button to create the Mail Receiver.

#### Notes:

- A new Mail Receiver record will be created.
- A history record will be generated for creation of the Mail Receiver.

#### 4.20.2. Modifying a Mail Receiver

Modify Mail Receiver modifies a new Mail Receiver. Mail Receivers accept connections from SMTP clients and create documents from the received emails. Optionally, External App Credentials are used to force SMTP clients to authenticate before the Mail Receiver will accept email from them.

- To modify a Mail Receiver, you must have the Mail Receivers privilege.
- You must have Modify access to the Mail Receiver. Modify access is determined by you being a Document Administrator or the actual owner of the Mail Receiver.
- Only a Document Administrator can change the owner of the Mail Receiver.
- The name of the specified Mail Receiver cannot be changed to the same as any other Mail Receiver in the system.

**Navigation:** [*DocMgr > Explorer > Navigate to Desired Folder > Side Menu > Receivers > Select Desired Receiver > Side Menu > Modify*]

##### **Step 1:**

1. If applicable, modify the name for this receiver in the Name box. A Name must be unique within the same Document Manager. This is a required field. The maximum length of the field is 64 characters. Note: The Name must conform to the rules for the local-part as described in RFC-2822. Generally, this means the following letters may be used: A-Z, a-z, 0-9, and the special characters `!#$%&'*+,-/=/?^_`{|}~`. For more specifics, RFC-2822 should be consulted.
2. Optionally enter a description for this receiver in the Description box. The maximum length of this field is 255 characters.
3. Enter a doc number mask for this receiver in the Doc Number Mask box. The maximum length of this field is 255 characters. The mask format uses the following codes: %H - hour, %M - minute, %S - second, %L - milliseconds, %m - month, %d - day, %y - year, %Y - short year, %u - username, %# - number, add #s for more digits. For example, to use a doc numbering mask that would produce documents number formatted as year-month-day followed by sequential numbers (i.e. 2016-11-01-0001, 2016-11-01-0002, etc.) you would enter %y-%m-%d-%#### where the %y represents the year, the %m represents the month, the %d represents the day, and the %#### represents enough decimal places for up to 9999 documents. If you need more or less documents, add or remove additional # characters.
4. If applicable, modify the title to use for documents created by this receiver in the Title box. The maximum length of this field is 1000 characters. JUEL expressions may be embedded in the title. JUEL expressions begin with `${` and end with `}`. The most common JUEL expression to use for the title is `${mail.getHeader("subject", "No Subject")}` which



uses the subject of the email as the title. Otherwise, the phrase No Subject is used as the title.

5. If applicable, modify the point of contact to use for documents created by this receiver in the Point of Contact box. The maximum length of this field is 48 characters. JUEL expressions may be embedded in the point of contact. JUEL expressions begin with `#{` and end with `}`. The most common JUEL expression to use for the point of contact is `#{mail.getHeader("from", "No From")}` which uses the from address of the email as the point of contact. Otherwise, the phrase No From is used as the point of contact.
6. If applicable, modify whether this receiver allows anonymous access or not in the Anonymous Access box's list. If not, email will only be accepted from SMTP clients that provide valid credentials that are associated to this Mail Receiver.
7. If applicable, modify the document source to be used for this receiver in the Document Source box's list. The following choices are available:
  - Whole Email - The whole email will be used for the document.
  - Attachments Only - Each attachment will be used to create a separate document. If no attachments are present, nothing will be created.
  - Attachments Else Whole Email - Each attachment will be used to create a separate document. If no attachments are present, the email will be used to create a document.
8. If applicable, modify whether this receiver should include the email on attachments saved as documents or not in the Include Email box's list. If Yes is chosen, when an attachment is saved as a document, the main email will be saved attached to that document.
9. If applicable, modify the Doc Category that will be used for documents created by this Mail Receiver in the Doc Category box by clicking on the down arrow and selecting it from the list.
10. If applicable, modify the Doc Type that will be used for documents created by this Mail Receiver in the Doc Type box by clicking on the down arrow and selecting it from the list.
11. If applicable, modify the Organization that will be used for documents created by this Mail Receiver in the Organization box by clicking on the down arrow and selecting it from the list.
12. If applicable, modify the owner of documents created by this receiver in the Owner box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign an owner.
13. If applicable, modify the highest web search for documents created by this receiver in the Web Search box by clicking on the down arrow and selecting it from the list.

Web Search	Definition
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<b>No</b>	Document attributes are not sent to the Search Manager(s). The Document is not searchable from the Search Manager(s). The Document is searchable on the Document Manager.
<b>Community</b>	The Document is searchable via the web to anyone within the organization and partner IP addresses.
<b>Global</b>	The Document is available to anyone anywhere on the World Wide Web.

14. Enter a reason for modifying the Mail Receiver in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
15. Click the Cancel button to cancel the command or click the Next button to continue.

#### Step 2:

External App Credentials may be assigned to a Mail Receiver to determine credentials that must be used by SMTP clients to restrict who can send emails to the Mail Receiver.

1. If applicable, modify the appropriate credentials to allow access to by selecting them from the Available box and clicking the Add button. You can also select credentials in the Allowed Access box and click the Remove button or the Remove All button to remove access from them to this Mail Receiver. If Anonymous Access was set to No on the previous screen, the Credentials field simple shows a message that no credentials can be assigned.
2. Click the Previous button to go back to the previous screen, click the Cancel button to cancel the command, or click the OK button to modify the Mail Receiver.

#### Notes:

- A history record will be generated for modification of the Mail Receiver.

### 4.20.3. Deleting a Mail Receiver

Delete Mail Receiver deletes an existing Mail Receiver. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Mail Receivers privilege.
- The User must have Delete access to the Mail Receiver. Delete access is determined by the User being a Document Administrator or the actual owner of the Mail Receiver.

**Navigation:** [*DocMgr > My Work > Receivers > Select Desired Mail Receiver > Side Menu > Delete*]

**Step 1:**

The Mail Receiver to be deleted is displayed.

1. Click the Cancel button to cancel the command or click the Next button to continue.

**Step 2:**

The Mail Receiver to be deleted is displayed.

1. Enter the reason for deleting the Mail Receiver in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Previous button to go back to the previous screen, click the Cancel button to cancel the command, or click the OK button to delete the Mail Receiver.

**Notes:**



- The Mail Receiver record will be deleted.
- Any associations to the Mail Receiver will be removed.
- A history record will be generated for deletion of the Mail Receiver.

**4.20.4. Showing Mail Receivers**

Show Mail Receiver displays a listing of all the Mail Receivers in the Document Manager.

**All Mail Receivers**

**Navigation:** *[DocMgr > Admin > Show... > Mail Receivers]*

- Name, Description, and Doc Number Mask are displayed for each Mail Receiver.
- The number of Mail Receivers is shown.
- The Mail Receivers are listed in alphabetical order by their Name.
- Click on  to View a specific Mail Receiver.
- Click on  to Show Info for a specific Mail Receiver.
- Use the scroll bar to scroll through the list.

**A Specific Mail Receiver**

Mail Receiver Info displays the full details for a specific Mail Receiver.

<b>Parent Folder</b>	The parent folder that will receive email sent to this Mail Receiver.
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<b>Name</b>	The unique name of this Mail Receiver.
<b>Email Address</b>	The unique email address of this Mail Receiver. The email address is determined by the name of this Mail Receiver and the host name of this server.
<b>Description</b>	The description of this Mail Receiver.
<b>Doc Number Mask</b>	The mask used to generate a document number for emails received by this Mail Receiver.
<b>Title</b>	The title to use for documents that are generated by this Mail Receiver. JUEL expressions may be embedded in the title. JUEL expressions begin with <b>#{</b> and end with <b>}</b> .
<b>Point of Contact</b>	The Point of Contact to use for documents that are generated by this Mail Receiver. JUEL expressions may be embedded in the point of contact. JUEL expressions begin with <b>#{</b> and end with <b>}</b> .
<b>Create Date</b>	Indicates when this Mail Receiver was created.
<b>Last Modify Date</b>	Indicates when this Mail Receiver was last modified.
<b>Anonymous Access</b>	Indicates if this Mail Receiver can be accessed by an anonymous SMTP client. If not, SMTP clients can only connect to this Mail Receiver with one of the associated External App Credentials.
<b>Document Source</b>	Indicates which part of the email should be used as the source when creating documents. <ul style="list-style-type: none"> <li>• Whole Email - The whole email will be used for the document.</li> <li>• Attachments Only - Each attachment will be used to create a separate document. If no attachments are present, nothing will be created.</li> <li>• Attachments Else Whole Email - Each attachment will be used to create a separate document. If no attachments are present, the email will be used to create a document.</li> </ul>
<b>Include Email</b>	When saving attachments as documents, this indicates if the main email should be saved attached to that document.
<b>Doc Category</b>	The Doc Category to use when documents are created using this Mail Receiver.

<b>Doc Type</b>	The Doc Type to use when documents are created using this Mail Receiver.
<b>Organization</b>	The Organization to use when documents are created using this Mail Receiver.
<b>Owner</b>	The user that will own documents that are created using this Mail Receiver.
<b>Web Search</b>	The highest level of Search Manager to use when documents are created using this Mail Receiver.

### External App Credentials

Note: This section will only be displayed if this Mail Receiver has any External App Credentials associated to it.



Credential Identifier, Available, Disabled, Failed Attempts, Blocked Until, Expiration Date, and Last Used will be displayed for each External App Credential associated to the Mail Receiver.

### 4.20.5. Showing Mail Receivers for a Folder

Show Mail Receiver displays a listing of all the Mail Receivers for a specific Folder.

**Navigation:** [DocMgr > Explorer > Select Desired Folder > Side Menu > Receivers]

#### **Mail Receivers for a Folder**



- Name, Description, and Doc Number Mask are displayed for each Mail Receiver.
- The number of Mail Receivers is shown.
- The Mail Receivers are listed in alphabetical order by their Name.
- Click on  to View a specific Mail Receiver.
- Click on  to Show Info for a specific Mail Receiver.
- Use the scroll bar to scroll through the list.

### 4.20.6. Showing My Mail Receivers

Show Mail Receiver displays a listing of all the Mail Receivers you own.

**Navigation:** [DocMgr > My Work > Side Menu > Receivers]

### **My Mail Receivers**

- Name, Description, and Doc Number Mask are displayed for each Mail Receiver.
- The number of Mail Receivers is shown.
- The Mail Receivers are listed in alphabetical order by their Name.
- Click on  to View a specific Mail Receiver.
- Click on  to Show Info for a specific Mail Receiver.
- Use the scroll bar to scroll through the list.

## **4.21. My Work**

My work is your work area. It provides a space for you to easily access information specifically pertaining to yourself and items that you need to take action on. Using My Work, you can find all the items that you own such as, Documents, Folders, Folder Shares, Groups, etc. This area also displays Review and RMA Record information such as, Reviews that you are on, Reviews that need your vote, RMA Records you own, RMA Records that need review, etc.

**Navigation:** [\[DocMgr > My Work\]](#)

This is your work area. It provides an area for you to easily access information specifically pertaining to yourself and items that you need to take action on. From the My Work side menu, you can find all the Documents you currently have reserved; all the Folders and Groups that you own, and all the Discussions that you are subscribed to. This area also displays all Reviews you need to vote on and if you are a Review Leader all Reviews that need your attention.

Account Info displays the full details of your User account.

Activity displays all the activity that you have performed in the Document Manager for the dates specified. For example: Logged In, Logged Out, Create Document, Modify Document, Release Document, Create Folder, Modify Folder, Associate Access, Create Group, etc.

A User's Current Default Folder is settable by the User and is the Folder that the User starts in each time that they log in to the Document Manager. In Addition, the current default Folder and the home Folder provides a way to quickly navigate from one to the other. The Explorer link on the horizontal top menu brings up the current default Folder and the Explore Home on the vertical side menu brings up the home Folder. A User can also get to their current default Folder by the Current Default link in the vertical side menu for My Work. For example, if somebody is temporarily working on another person's Documents, they can set their default Folder to the other person's Folder (provided they have access). If a default Folder has not been set by a User, then their current default Folder is their home Folder.

Unlike the current default Folder that can be set by a User, a User's Home Folder is only settable by the Document Administrator.

Explore Root takes you to the root where all the Cabinets are displayed.

History displays all the History on your User account. For example, Logged In, Logged Out, Modify User (User account information was modified), Create User (when User account was created), etc.

Mass Modify Doc Access allows you to modify the access settings on multiple Documents at the same time.

Mass Modify Docs allows you to modify one or more of the data fields on many Documents at the same time.

Modify Info allows you to modify your User account information: For example, Change your password, email, phone number, mail code, etc.

Session Settings allows you to enable or disable e-mail for distribution and notification events. For example: if you are on a notification or distribution list and you disable these settings, while you are currently logged in, you will not receive any mail notification for these events. Once you log out these settings will be enabled.

User Settings allows you to choose whether the owner is selected by default for distribution and/or notification when creating Documents and Folders.

All of my Documents, Folders/Cabinets, Folder Shares, Groups, Reserved Docs, RMA Record Sets, Search Folders, and Subscriptions allow you to quickly display all of your Documents, Folders, Folder Shares, Groups, all Documents that are currently reserved by you, RMA Record Sets, Search Folders, and all Discussions you are subscribed to.

Reviews That Need My Vote (displays all the Reviews that require your vote because you are on the current level) and All that I'm on displays all the Reviews that you are a member on that have not been completed or cancelled. If you are a Review Leader, other options that may appear are That Need My Action (displays all Reviews I lead that need action such as: Paused, Requiring Leader Attention, Ready to Release, etc.), and All that I lead (displays all Reviews that I lead).

RMA Records Owned, Frozen, Past Retention, Permanent, Vital, and Need Review allows you to quickly display all of the RMA Records that you own or have Owner access, are frozen, are past retention, are permanent, are vital, or need to be reviewed.

My Account Information:

**Navigation:** [[DocMgr](#) > [My Work](#) > [Side Menu](#) > [Account Info](#)]

My Account Information displays the full details of your User account.

<b>Field Name</b>	<b>Definition</b>
<b>Username</b>	Your User account name.
<b>Full Name</b>	Your full name.
<b>Home Folder</b>	Your home Folder is the home Folder that is assigned by the Document Administrator. Only the Document Administrator may change a User's home Folder. Click on link to go to the User's home Folder.
<b>Current Default</b>	Your current default Folder. Current default Folder is a specific area you go to when logging into the Document Manager. You can change your current default Folder. Click on link to go to the current default Folder.
<b>Email Address</b>	Your SMTP email address. Click on link to send email to this User.
<b>Location</b>	Your physical location, such as Bldg./Room, etc.
<b>Mail Code</b>	Your mail code or mail stop.
<b>Phone Number</b>	Your phone number.
<b>Employer</b>	Your Employer.
<b>Organization</b>	Your Organization.
<b>Privileges</b>	Your User privileges. (See definition of privileges listed below).
<b>Authentication</b>	The Authenticator that this User uses for checking their password. If a User is authenticated locally, then (Local) will be displayed in the Authentication field; otherwise, the Authenticator name and username (either the authentication data text, or if empty, the User's username) is displayed separated by a forward slash.
<b>Last Login</b>	The date and time that you last logged into the Document Manager. Note: Only an Admin can view the last login of a User.
<b>Login Failures</b>	The number of login failures since the User last successfully logged in. Note: Only an Admin can view the login failures of a User.
<b>Disabled</b>	Indicates if your account is disabled. No - account is not disabled; Yes - account has been disabled. Note: Only an Admin can view the disabled setting of a User.
<b>Account Expires</b>	Indicates when your account expires. This field will be blank if no expiration date has been set.



<b>Password Expires</b>	Indicates when your password expires.
<b>Security Answer</b>	The answer to the security question that allows this User to use the forgot password function to reset their own password; NULL if the User did not provide the answer to the security question; or NULL if this User is not allowed to use the forgot password function. Note: Only an Admin can view the security answer of a User.
<b>Comments</b>	Optional Comments that the Document Administrator can make about your account. Note: Only an Admin can view Comments on a User.

### Privileges

Privileges are assigned to each User in the system to determine which types of commands they are allowed to perform. However, a privilege does not guarantee that a command can be used on any object in the system. For example, a User can be granted the privilege Delete Documents. The User can only delete Documents that they own or Documents that they have been given Delete access to. It is important to note that users with Admin privilege automatically have all other privileges.

The following is a list of privileges that can be granted on a per User basis:

#### Cabinet

- Create - A User can create Cabinets. No further access is required to create a Cabinet.
- Modify - A User can modify the attributes of Cabinets. The User must also have Modify access to a Cabinet that is being modified.
- Delete - A User can delete Cabinets. The User must also have Delete access to a Cabinet that is being deleted.

#### Folder

- Create - A User can create Folders. The User must also have Create Folder access to the Cabinet/Folder under which they plan to create a Folder.
- Modify - A User can modify the attributes of Folders. The User must also have Modify access to a Folder that is being modified.
- Delete - A User can delete Folders. The User must also have Delete access to a Folder that is being deleted.

#### Document

- Create - A User can create Documents. The User must also have Create Document access to the Cabinet/Folder under which they plan to create a Document.
- Modify - A User can modify the attributes of Documents. The User must also have Modify access to a Document that is being modified.
- Delete - A User can delete Documents. The User must also have Delete access to a Document that is being deleted.

#### Generation

- Create - A User can create new Generations of Documents. The User must also have Reserve/Replace access to the Document. To replace an existing Generation, with a newly created Generation, the User must also have the Delete Generation privilege and Delete access to the Generation that is being replaced.
- Modify - A User can modify the attributes of Generations. The User must also have Modify access to the Document.
- Delete - A User can delete Generations. The User must also have Delete access to the Generation of the Document.

#### Other

- Admin - A User has full administrative access to the system. An Admin automatically has all other privileges and has full access to all data within the system.
- Groups - A User can use Groups, which includes creating, modifying and deleting Groups, and associating access, distribution, and notification to Cabinets, Folders, Documents, and Generations. The User must have owner access to a Group to modify or delete it. The User must have Owner access to a Cabinet, Folder, Document, or Generation to associate access, distribution, and notification to it. The User may use (but not change) other users' Groups, but only if they are Shared Groups.
- Reports - A User can use Reports, which includes creating, modifying, deleting and running Reports. The User must own a Report to modify or delete it. The User may run other users' Reports, but only if they are shared Reports.
- Guest Only - This User is specifically restricted to remote read only access on the system. The User cannot be given any other privileges. The User cannot even log in, change their password or change their current default.
- Read Only - This User is specifically restricted to read only access on the system. The User cannot be given any other privileges. The User can change their password, account information, and their current default. However, they are not allowed to change anything else within the system.
- Restricted - This User is given restricted access on the system. The User can still be given any other privilege except the Admin, Guest Only, and Read Only privilege. However, you can essentially make a restricted User "read only" by making them restricted and not granting them any other privileges.

When a restricted User logs in, they will only be able to read Documents and Folders that they own or that they have been given explicit access to or Documents that are designated as Global read. Local read on Folders and Local read, Campus read, and Community read on Documents are ignored when a restricted User's access is being checked.

Like normal users, a restricted User may only create/modify/delete items if they have the additional privilege(s) required and that they own the item or they have been associated to with the proper access to the item. If a User logs in from a restricted network address, they may only log into a restricted User account. If a User logs in from a Campus or Community network address (depending on System Property settings), he/she is able to log into a Restricted User account but they will still maintain their restricted status while logged in.

## Review





- Bypass - A User can bypass release Documents. The User must also have Owner access to the Document that is being bypass released.
- Leader - A User is able to conduct the Review of Documents if they have the Review Leader privilege. This includes the creation and maintenance of a Review. The User must also have Read access to the Document in Review. A User is also able to create and maintain Review Teams.
- Releaser - A User can bypass-release Documents that are not in Review or release a Document that is in Review and is ready to be released. The User must also have Read access to the Document that is being released.






## All My Documents

**Navigation:** [[DocMgr](#) > [My Work](#) > [Side Menu](#) > [Documents](#)]











My Documents displays all your Documents in the Document Manager.

Note: If you have not created a Document in the Document Manager, the following message will be displayed: "You have no Documents in the system."

- The Number and Title are displayed for each Document.
- The number of Documents is shown.
- The Documents are listed in alphabetical order by the Document number.
- Click on  to Explore Document (view all Generations) of the specific Document.
  -  indicates that the specific Document is reserved.
  -  indicates that the specific Document is in Review.
  -  indicates that the specific Document is reserved and in Review.

-  indicates that the specific Document is cancelled.
- Click on  to Show Info of the specific Document.
- Click on  to Fetch Latest Generation of the specific Document.
- Click on  or  to Show Comments for the specific Document. This icon will not be available if there are no Comments for the Document.
- Click on the Metric status icon to display the Metric Info of the specific Document. Note: The Metric status icons will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant
-  Red - Worsening

A late Metric icon will be displayed as opaque. For example: 

### Stoplight Criteria

Green represents progress according to plan.

Yellow represents an area of concern.





Red represents a significant problem.

### All My Folders

**Navigation:** [\[DocMgr > My Work > Side Menu > Folders\]](#)

My Folders displays all your Cabinets/Folders in the Document Manager.



- The Name and Description are displayed for each Cabinet/Folder.
- The number of Cabinets and Folders are shown.
- The Cabinets/Folders are listed in alphabetical order by the Cabinet/Folder name.

- Click on  to Explore Cabinet of the specific Cabinet.
- Click on  to Show Info of the specific Cabinet.
- Click on  to Explore Folder of the specific Folder.
- Click on  to Show Info of the specific Folder.

### All My Folder Shares

**Navigation:** [DocMgr > My Work > Side Menu > Folder Shares]





My Folder Shares displays all the Folder Shares in the Document Manager that you own.

- The Name and Description are displayed for each Folder Share.
- The number of Folder Shares is shown.
- The Folder Shares are listed in alphabetical order by the Folder Share name.
- Click on  to View Folder Share of the specific Folder.
- Click on  to Show Info of the specific Folder Share.

### All of My Groups

My Groups displays all your Groups, private and shared, in the Document Manager.

Note: If you have not created a Group in the Document Manager, the following message will be displayed: "You don't have any Groups."







- The Name and Description are displayed for each Group.
- The number of Groups is shown.
- The Groups are displayed in alphabetical order by the member type. The member types are: Local Users, Remote Emails and Remote Users.
- Click on  to View Local Users Group Info for the specific Group.
- Click on  to View Remote Emails Group Info for the specific Group.
- Click on  to View Remote Users Group Info for the specific Group.
- Click on  to Show Info of the specific Group.

### All My Reserved Documents

**Navigation:** [DocMgr > My Work > Side Menu > Reserved Docs]

Documents reserved by me displays all your Documents that you have reserved in the Document Manager.



Note: If you have no Documents reserved, the following message will be displayed: "You have no Documents reserved at this time."

- The Number and Title are displayed for each Document that you have reserved.
- The number of Documents is shown.
- The Documents are listed in alphabetical order by the Document number.
- Click on  to Show Info of the specific Document.
- Click on  to Fetch Latest Generation of the specific Document.
-  indicates that the specific Document is reserved.
-  indicates that the specific Document is reserved and in Review.
-  indicates that the specific Document has an open Comment associated to it.
-  indicates that the specific Document has a closed Comment associated to it.

### All of My RMA Record Sets

**Navigation:** [DocMgr > My Work > Side Menu > RMA Records Sets]

My RMA Record Sets displays all the RMA Record Sets that you own in the Document Manager.







- The RMA Set Name, Type, Parent Name and Frozen are displayed for each RMA Record Set.
- The number of RMA Record Sets is shown.
- The RMA Record Sets are listed in alphabetical order by their Set Name.
- Click on  to View a specific RMA Record Set.
- Click on  to Show Info for a specific RMA Record Set.

















### All Discussions Subscribed to

**Navigation:** [DocMgr > My Work > Side Menu > Subscriptions]

Subscriptions displays all individual Discussions that you are subscribed to.

Note: If you have not subscribed to any individual Discussions, the following message will be displayed: "You aren't subscribed to any individual Discussions."




- The Posted By, Subject, Replies, and Review are displayed for each Discussion.
- The number of Discussions is shown.
- Click on  to View this post of the specific Discussion.
- Click  to Reply to this post.
-  indicates an attachment to the Discussion. Click the  to open the attachment.
-  indicates votes. Click  to View Discussion and display the Discussion Tree for Review screen.

-  indicates a Discussion. Click  to View Discussion and display the Discussion Tree for Review screen.
-  indicates a reply to a Discussion. Click the  to View Discussion and display the Discussion Tree for Review screen.
-  indicates the voter cast a vote of Approve. Click the  to View Discussion and display the Discussion Tree for Review screen.
-  indicates the voter cast a vote of Concur with Remarks. Click the  to View Discussion and display the Discussion Tree for Review screen.
-  indicates the voter cast a vote of Concur Pending Resolution of Remarks. Click  to View Discussion and display the Discussion Tree for Review screen.
-  indicates the voter cast a vote of Non-concur with Remarks. Click the  to View Discussion and display the Discussion Tree for Review screen.
-  indicates the voter cast a vote of Waive. Click the  to View Discussion and display the Discussion Tree for Review screen.
-  indicates a vote of auto-concur. Click the  to View Discussion and display the Discussion Tree for Review screen. Note: If there is a due date for the level and Auto-Concur is on for that level, when the voter does not vote by the due date the system automatically cast a vote of Auto-Concur. The Auto-Concur vote is considered a negative vote.

### Reviews that I am Subscribed to for All Discussions

Displays all Reviews for all Discussions that you are subscribed to.

Note: If you have not subscribed to any Reviews for all Discussions, the following message will be displayed: "You aren't subscribed to any Reviews for all Discussions."

- The Review, Start Date, State, and State Date are displayed for each Review.
- The number of Reviews is shown.
- Click on  to View Review and display the Review Info screen.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussion of the specific Review.




### All Reviews that Need My Attention

**Navigation:** [DocMgr > My Work > Side Menu > That Need My Action]

- User must have the Review Leader privilege.

Reviews that need my action displays all Reviews that need your attention. Examples of Reviews that need your attention are Reviews that are paused, Reviews that are past due, Reviews that have negative votes, Reviews that are ready to be released, etc.

Note: If you have no Reviews that need your attention, the following message will be displayed: "You have no Reviews that need your attention at this time."




- The Review, Start Date, State, and State Date are displayed for each Review.
- The number of Reviews is shown.
- Click on  to View Review and display the Review Info screen.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussion of the specific Review.

All Reviews that I Need to Vote on

**Navigation:** [\[DocMgr > My Work > Side Menu > That Need My Vote\]](#)

Reviews that I need to vote on displays all Reviews that you need to vote on.



Note: If you have no Reviews that require your vote, the following message will be displayed: You have no Reviews that you need to vote on at this time.

- The Review, Start Date, State, and State Date are displayed for each Review.
- The number of Reviews is shown.
- Click on  to View Review and display the Review Info screen.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussion of the specific Review.

All RMA Record I Own

**Navigation:** [\[DocMgr > My Work > Side Menu > That I Own\]](#)

My RMA Records displays all the RMA Records that you own in the Document Manager.



- The ID, Doc Number, Date Filed, Publication Date, Last Review Date, Next Review Date, and Retention Date are displayed for each RMA Record.
- The number of RMA Records is shown.
- The RMA Records are listed in alphabetical order by ID.
- Click on  to View RMA Record.
- Click on  to Show Info of the specific RMA Record.

All My RMA Records That Are Frozen

**Navigation:** [\[DocMgr > My Work > Side Menu > That Are Frozen\]](#)





My RMA Records that are frozen displays all the RMA Records that you own in the Document Manager that are frozen.

- The ID, Doc Number, Date Filed, Publication Date, Last Review Date, Next Review Date, and Retention Date are displayed for each RMA Record.
- The number of RMA Records is shown.
- The RMA Records are listed in alphabetical order by ID.
- Click on  to View RMA Record.
- Click on  to Show Info of the specific RMA Record.

All My RMA Records That Are Past Retention

**Navigation:** *[DocMgr > My Work > Side Menu > That Are Past Retention]*



My RMA Records that are past retention displays all the RMA Records that you own in the Document Manager that are past retention.

- The ID, Doc Number, Date Filed, Publication Date, Last Review Date, Next Review Date, and Retention Date are displayed for each RMA Record.
- The number of RMA Records is shown.
- The RMA Records are listed in alphabetical order by ID.
- Click on  to View RMA Record.
- Click on  to Show Info of the specific RMA Record.

All My RMA Records That Are Permanent

**Navigation:** *[DocMgr > My Work > Side Menu > That Are Permanent]*



My RMA Records that are permanent displays all the RMA Records that you own in the Document Manager that are permanent.

- The ID, Doc Number, Date Filed, Publication Date, Last Review Date, Next Review Date, and Retention Date are displayed for each RMA Record.
- The number of RMA Records is shown.
- The RMA Records are listed in alphabetical order by ID.
- Click on  to View RMA Record.
- Click on  to Show Info of the specific RMA Record.

All My RMA Records That Are Vital

**Navigation:** *[DocMgr > My Work > Side Menu > That Are Vital]*



My RMA Records that are vital displays all the RMA Records that you own in the Document Manager that are vital.

- The ID, Doc Number, Date Filed, Publication Date, Last Review Date, Next Review Date, and Retention Date are displayed for each RMA Record.
- The number of RMA Records is shown.
- The RMA Records are listed in alphabetical order by ID.
- Click on  to View RMA Record.
- Click on  to Show Info of the specific RMA Record.

#### All My RMA Records That Need Review

**Navigation:** [DocMgr > My Work > Side Menu > That Need Reviews]

My RMA Records that need reviewing displays all the RMA Records that you own in the Document Manager that need to be reviewed.

- The ID, Doc Number, Date Filed, Publication Date, Last Review Date, Next Review Date, and Retention Date are displayed for each RMA Record.
- The number of RMA Records is shown.
- The RMA Records are listed in alphabetical order by ID.
- Click on  to View RMA Record.
- Click on  to Show Info of the specific RMA Record.



#### 4.21.1. My Activity

**Navigation:** [DocMgr > My Work > Side Menu > Activity]

My Activity displays all the activities that you have performed in the Document Manager; for example, Logged In, Logged Out, Create Document, Modify Document, Release Document, Create Folder, Modify Folder, Associate Access, Create Group, etc.

It also shows the Action's details to make Log In failures quickly detectable. It also helps prevent the need to drill into many other items as well.

Note: All failed log in attempts generate a history record.

- The Date, Username, Action, Details, and Reason are displayed for each action. Note: Details are not displayed for all actions.
- The number of actions is shown.
- Click on  or  to View Activity Details.

The Activity is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of Activity are displayed. Activity can be displayed for a specific date, a range of dates, or all the activities.

- To display Activity for a specific date. For example, display Activity for 02/03/2019. Under Show My Activity within the Date Range box enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display Activity for a range of dates. For example, display Activity from 01/18/2019 to 01/23/2019. Under Show My Activity within the Date Range box enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display Activity since a specific date. For example, display Activity from 01/19/2019 to present date. Under Show My Activity within the Date Range box enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display Activity prior to a specific date. For example, display Activity prior to 01/23/2019. Under Show My Activity within the Date Range box enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all Activity under Show My Activity within the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the Activity.



#### 4.21.2. My History

**Navigation:** [\[DocMgr > My Work > Side Menu > History\]](#)

My History displays all the actions that have been performed on your account; for example, Logged In, Logged Out, Modified User, etc.

It also shows the Action's details to make Log In failures quickly detectable. It also helps prevent the need to drill into many other items as well.

Note: All failed log in attempts generate a History record.

- The Date, Username, Action, Details, and Reason are displayed for each action. Note: Details are not displayed for all actions.
- The number of actions is shown.
- Click on  or  to View History Details.

The History is displayed chronologically by date. Depending on what the DefaultHistoryDays System Property is set to, determines how many days of History are displayed. History can be displayed for a specific date, a range of dates, or all the History.

- To display History for a specific date. For example, display History for 02/03/2019. Under Show My History within the Date Range box, enter 02/03/2019 to 02/03/2019. Use: mm/dd/yyyy.
  - To display History for a range of dates. For example, display History from 01/18/2019 to 01/23/2019. Under Show My History within the Date Range box, enter 01/18/2019 to 01/23/2019. Use: mm/dd/yyyy.
  - To display History since a specific date. For example, display History from 01/19/2019 to present date. Under Show My History within the Date Range box, enter 01/19/2019 in first date field. Leave second date field blank. Use: mm/dd/yyyy.
  - To display History prior to a specific date. For example, display History prior to 01/23/2019. Under Show My History within the Date Range box, enter 01/23/2019 in second date field. Leave first date field blank. Use: mm/dd/yyyy.
  - To display all History under Show My History within the Date Range box leave both date fields blank.
1. Optionally, choose a specific action. If no action is chosen, all actions in the specified date range will be displayed.
  2. Enter desired date(s) in the Date Range boxes.
  3. Click the Clear Input button to clear the Action and Date Range boxes or click the OK button to display the History.

### 4.21.3. My Session Settings

**Navigation:** *[DocMgr > My Work > Side Menu > Session Settings]*

A new session is created each time you log into the TechDoc Document Manager. By default, e-mail for distribution, notification and review events is enabled when a new session is created.

This feature is particularly useful when you need to do a large amount of maintenance work and you do not want to bother users with many superfluous emails. Note that suppressing too many emails could leave users "out of the loop" on what's happening so remember to use this feature with discretion.

1. To disable e-mail for distribution events, click the box by "Enable e-mail for distribution events." Doing this will remove the check from the box.
2. To disable e-mail for notification events, click the box by "Enable e-mail for notification events." Doing this will remove the check from the box.
3. To disable e-mail for review events, click the box by "Enable e-mail for review events." Doing this will remove the check from the box.
4. To change the priority of documents submitted to the SM during this session, enter a number between -255 and 255 where 0 is normal. This option is only available for Admins.

Note: Changes to these settings only affect the current session.

5. Click the Cancel button to cancel the command or click the OK button to change the session settings.

#### 4.21.4. My User Settings

**Navigation:** *[DocMgr > My Work > Side Menu > User Settings]*

By default, when creating a Document, Folder, or Project, the owner is always added for distribution and notification.

This feature is particularly useful when you need to do a large amount of work and you do not want to generate many superfluous emails. Note that suppressing too many emails could leave the owner "out of the loop" on what's happening so remember to use this feature with discretion.

1. If the owner should not be added by default for distribution events when creating a Document, uncheck the box by "Enable Owner on distribution for Create Document".
2. If the owner should not be added by default for notification events when creating a Document, uncheck the box by "Enable Owner on notification for Create Document".
3. If the owner should not be added by default for notification events when creating a Folder, uncheck the box by "Enable Owner on notification for Create Folder".
4. If the owner should not be added by default for notification events when creating a Project, uncheck the box by "Enable Owner on notification for Create Project".
5. Click the Cancel button to cancel the command or click the OK button to change the user settings.

Note: Changes to these settings are remembered even after logging out.

#### 4.21.5. Change Password

Change Password allows a user to change their password if TechDoc manages a local password for their account. If the user's TechDoc account is remotely authenticated, the user must follow the appropriate procedures for that remote account in order to change the password.

- The user must be logged in.
- The user must be locally authenticated.
- The user must know their current password.

**Navigation:** *[DocMgr > My Work > Side Menu > Change Password]*

##### **Step 1:**

1. Enter the current password assigned to your account in the Old Password box. This is a required field. The maximum length of the field is 32 characters.

2. Enter the new password in the New Password box. This is a required field. The maximum length of the field is 32 characters. Note: The password must meet system password strength requirements. After you click on the OK button, if the password is not strong enough, an error message will be displayed specifying the minimum requirements that must be met.
3. Re-enter the new password in the New Verify box. This is a required field. The maximum length of the field is 32 characters. The New Password and the New Verify password must match.
4. Click the Cancel button to cancel the command, or click the OK button to change your password.

**Notes:**

- If the user fails to enter the correct current password too many times in one session, the user will be logged out and an alert will be sent. The PasswordBreakIn System Property determines the actual number of failed attempts that are allowed.
- The current user record will be modified.
- A history record will be generated for changing the password.
- As an added security measure, an email will be sent to the user notifying them when their password has been successfully changed.

#### 4.21.6. Modify My Info

**Navigation:** *[DocMgr > My Work > Side Menu > Modify Info]*

You can modify your User information as follows:

1. If applicable, modify your last name in the Last Name box. This is a required field. The maximum length of this field is 32 characters.
2. If applicable, modify your first name in the First Name box. This is a required field. The maximum length of this field is 32 characters.
3. If applicable, modify your middle initial in the Middle Initial box.
4. If applicable, modify your email address in the Email box. The maximum length of this field is 128 characters.
5. If applicable, modify your location in the Location box. This is normally a physical location, such as Bldg/Room, etc. The maximum length of this field is 64 characters.
6. If applicable, modify your phone number in the Phone Number box. The maximum length of this field is 32 characters.
7. If applicable, modify your mail code in the Mail Code box. The maximum length of this field is 32 characters.
8. Enter the reason for modifying your information in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the OK button to modify your User information.

Note:

- A history record will be generated for modification of User's information.

#### 4.21.7. Set Current Default

**Navigation:** *[DocMgr > My Explorer > Navigate to Desired Location > Side Menu > Set Default]*

When a User logs into the Document Manager they go to a specific area (Cabinet or Folder). Set current default allows the User to change the area they go to when logging into the Document Manager.

Click the Cancel button to cancel the command, or click the OK button to set default to another Folder.

### 4.22. Projects Management Menu

The Projects Management menu contains all of the functioning for creating and managing Projects. Projects are used as a method of grouping together Documents and tracking them in the Document Manager. Projects also lets you track the start and end date of a Project as well as add Keywords. This menu displays all of your Projects in the system. Currently, this menu is only available to Users with the Projects privilege or Administrators.

**Navigation:** *[DocMgr > Projects]*

A User with the Projects Manager or Admin privilege will have access to all of the Projects Management functions. A User with the Projects privilege will only have access to their Projects.

#### 4.22.1. Creating a Project

Create Project creates a new Project in the Document Manager. A Project is primarily used to group Documents that are associated or produced as part of a specific project, task, or activity. For example, your group has been tasked to process a payload on a rocket. A Project could be created for tracking all the documents that will be used and/or created during the processing of that payload. This makes it easier for group members or people outside the group to determine which documents were used for the processing.

- The User must have the Project, or Project Manager privilege to create a Project.
- The Project name cannot be the same as any other Project in the system.

**Navigation:** *[DocMgr > Projects > Side Menu > Create Project]*

**Step 1:**

1. Enter the Project name in the Name box. The Project name must be unique within the same Document Manager. Name is a required field. The maximum length of this field is 255 characters.
2. Enter the description of the Project in the Description box. The maximum length of this field is 255 characters.
3. Enter the Project owner in the Owner box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign the owner of a Project.
4. By default, you/the Project owner will automatically be added to the notification list of this Project. If you do not want yourself/the Project owner to be added to the notification list, uncheck the box next to "Check to add myself to the notification list" or "Check to add owner to the notification list".

Note: Notification lists consist of Users that are notified when a attributes of Project have been modified; and when a Project has been deleted.

5. By default, your Organization is entered in the Organization box. If you need to change the Organization, click on the down arrow and select it from the list. The selected Organization is the Organization the Project will belong to.
6. Enter the date the Project is scheduled to start in the Scheduled Start Date box. Use the first box for the date and the second box for the time. If the scheduled start date is not yet know, it can be left blank and filled in later.
7. Enter the date the Project is scheduled to end in the Scheduled End Date box. Use the first box for the date and the second box for the time. If the scheduled end date is not yet know, it can be left blank and filled in later.
8. Enter the date the Project actually started in the Actual Start Date box. Use the first box for the date and the second box for the time. If the actual start date is not yet know, it can be left blank and filled in later.
9. Enter the date the Project actually ended in the Actual End Date box. Use the first box for the date and the second box for the time. If the actual end date is not yet know, it can be left blank and filled in later.
10. Enter the reason for creating the Project in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
11. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

Keywords are User-defined attributes that can be assigned to a Project. Keywords can be displayed as a text field, or a drop down box.

1. If desired, select a Keyword from the New Keyword drop down and click Add to add the selected Keyword to the Project. After adding the Keyword, enter or select a value for the Keyword.



2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen or click the OK button to create the Project.

Notes:

- A new Project record will be created.
- A history record will be generated for creation of the Project.

### 4.22.2. Modifying a Project

Modify Project modifies a Project in the Document Manager. A Project is primarily used to group Documents that are associated or produced as part of a specific project, task, or activity. For example, your group has been tasked to process a payload on a rocket. A Project could be created for tracking all the documents that will be used and/or created during the processing of that payload. This makes it easier for group members or people outside the group to determine which documents were used for the processing.

- The User must have Owner access to the Project.
- The Project name cannot be the same as any other Project in the system.

**Navigation:** *[DocMgr > Projects > Select Desired Project > Side Menu > Modify]*

**Step 1:**

1. If applicable, modify the Project name in the Name box. Project name must be unique within the same Document Manager. Name is a required field. The maximum length of this field is 255 characters.
2. If applicable, modify the Project description in the Description box. The maximum length of this field is 255 characters.
3. If applicable, modify the Project owner in the Owner box. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign the owner of a Project.
4. If applicable, modify the notification setting by checking or unchecking the box next to "Check to add myself to the notification list" or "Check to add owner to the notification list".

Note: Notification lists consist of Users that are notified when a attributes of Project have been modified; and when a Project has been deleted.

5. If applicable, modify the Project Organization in the Organization box.
6. If applicable, modify the Scheduled Start Date in the Scheduled Start Date box. Use the first box for the date and the second box for the time.
7. If applicable, modify the Scheduled End Date in the Scheduled End Date box. Use the first box for the date and the second box for the time.

8. If applicable, modify the Actual Start Date in the Actual Start Date box. Use the first box for the date and the second box for the time.
9. If applicable, modify the Actual End Date in the Actual End Date box. Use the first box for the date and the second box for the time.
10. Enter the reason for modifying the Project in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
11. Click the Cancel button to cancel the command, or click the OK button to modify the Project.

Notes:

- The Project record will be modified.
- A history record will be generated for modifying the Project.

### 4.22.3. Deleting a Project

Delete Project deletes an existing Project in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have Owner access to the Project.

**Navigation:** *[DocMgr > Projects > Select Desired Project > Side Menu > Delete]*

**Step 1:**

The Project to be deleted and the Project attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Project to be deleted and the Project attributes are displayed.

1. Enter the reason for deleting the Project in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Project.

Notes:

- The Project record will be deleted.
- A history record will be generated for deletion of the Project.

#### 4.22.4. Showing a Project



Displays all Projects created in the Document Manager

##### **All Projects**

**Navigation:** [DocMgr > Projects > Side Menu > All Projects]

All Projects displays all the Projects created in the Document Manager.



Note: Only a User with the Projects Manager, or Admin privilege can show All Projects. If no Projects have been created in the Document Manager, the following message will be displayed: "There aren't any Projects."

- The Name and Description are displayed for each Project.
- The number of Projects is shown.
- The Projects are displayed in alphabetical order by Name.
- Click on  to View Project Info for the specific Project.
- Click on  to Show Info for the specific Project.

##### All Projects

**Navigation:** [DocMgr > Projects > Side Menu > My Projects]



My Projects displays all the Projects that you have created in the Document Manager.

- The Name and Description are displayed for each Project.
- The number of Projects is shown.
- The Projects are displayed in alphabetical order by Name.
- Click on  to View Project Info for the specific Project.
- Click on  to Show Info for the specific Project.

##### Projects for Document

**Navigation:** [DocMgr > Explorer > Select Desired Document > Side Menu > Projects]

Projects for Document displays all the Projects the selected Document is associated to.

- The Name and Description are displayed for each Project.
- The number of Projects is shown.
- The Projects are displayed in alphabetical order by Name.
- Click on  to View Project Info for the specific Project.
- Click on  to Show Info for the specific Project.

## A Specific Project

**Navigation:** [DocMgr > Projects > Select Desired Project]

Project Info displays the full details for a specific Project.

The User must have Read access to the Project.

Field Name	Description
<b>Name</b>	The name of this Project.
<b>Description</b>	The description of this Project.
<b>Owner</b>	The User that owns this Project. Click the owner's name link to display the User Info screen.
<b>Organization</b>	The Organization that this Project belongs to.
<b>Created</b>	The date and time this Project was created.
<b>Modified</b>	The date and time this Project was last modified.
<b>Scheduled Start Date</b>	The date and time this Project was scheduled to start.
<b>Scheduled End Date</b>	The date and time this Project was scheduled to end.
<b>Actual Start Date</b>	The date and time this Project was actually started.
<b>Actual End Date</b>	The date and time this Project actually ended.
<b>Project Keywords</b>	If this Project has Keywords associated, the Projects Keywords will be displayed at the bottom of the screen.
<b>Project Documents</b>	If this Project has Documents associated, the Documents will be displayed at the bottom of the screen. The Document Number, Latest Revision, and Title will be shown for each Document.

#### 4.22.5. Adding a Document to a Project

Add Project Document allows a user the capability to add a Document to a Project.

- The user must have Add Document access to the Project.

**Navigation:** *[DocMgr > Projects > Select Desired Project > Side Menu > Add Document]*

**Step 1:**

1. Enter the Document Number of the Document to add to the Project.
2. Enter the reason for adding the Document in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
3. Click the Cancel button to cancel the command or click the OK button to add the Document to the Project.

Notes:

- A history record will be generated for the Project Document addition.
- Email will be sent to the notification associated with the Project.

#### **4.22.6. Removing a Document from a Project**

Remove Project Document allows a user the capability to remove a Document from a Project.

- The user must have Remove Document access to the Project.

**Navigation:** *[DocMgr > Projects > Select Desired Project > Select Desired Project Document > Side Menu > Remove Document]*

**Step 1:**

The Document Number of the Document to remove from the Project is displayed.

1. Click the Next button to remove the Document or click the Cancel button to cancel the command.

Step 2:

1. Enter the reason for removing the Document from the Project in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to remove the Document from the Project.

Notes:

- A history record will be generated for the removal of the Document from the Project.
- Email will be sent to the notification associated with the Project.

## 4.23. Records Management Menu

The Records Management menu contains all of the functioning for creating and managing RMA Records, RMA Record Sets, RMA File Plans, and RMA Keywords. This menu also displays RMA Reports that show information about RMA Records like, RMA Records that are frozen, RMA Records that need Review, etc. Currently, this menu is only available to Users with the Records Manager privilege or Administrators.

**Navigation:** *[DocMgr > Records]*

A User with the Records Manager or Admin privilege will have access to all of the Records Management functions. A User with the Records Sets privilege will only have access to the RMA Record Set related functions.

## 4.24. Renditions

TechDoc supports an alternate rendition of a Generation when a Document has been released. Typically, the rendition is a watermarked PDF file of the released Generation. The main purpose of a rendition is to allow end-users to view the Document without having the authoring tools used by the native Generation. For example, providing a watermarked PDF file of a Microsoft Office Word 97 document allows present and future end-users to view the released Document without having to have a Word 97 viewer installed.

### 4.24.1. Creating a Rendition

Create Rendition allows a User with the appropriate privileges the ability to create a Rendition for a released Generation. A Rendition of a Generation is the watermarked PDF file of the released Generation.

- The User must have Read access to the Document and have the Releaser privilege or have Owner access to the Document and have the Bypass privilege.
- The Generation must be released.
- The Mime Type of the Generation must allow rendering.
- The Document Type of the Document must allow rendering.
- A rendered Generation cannot already exist.
- The replacement file must be a PDF file.
- Replacement Rendition must contain any applicable watermark.
- If the Generation is in the queue to be rendered (in the pending requests) you will not be able to create the Rendition.

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Select Desired Generation > Side Menu > Create Rendition]*

**Step 1:**

1. Enter the reason for creating the Rendition in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.

Note: The new Rendition must contain any applicable watermark.

2. Click the Cancel button to cancel the command or click the Next button to continue.

**Step 2:**

1. At the File box click on the Browse... button to locate the Rendition to be created in the Document Manager.

Note: The File Upload box will be displayed. The file must be a PDF file. Rendition must contain any applicable watermark.

2. In the Look in box select the drive/folder where the Rendition to be created in the Document Manager is located. To display all of the files in the folder, in the Files of type box, click on the down arrow and select All Files (\*.\*). Click on the Rendition to be created in the Document Manager. This will automatically insert the filename in the File name box. Click the Open button.

Note: Restricted Fetch Access allows you to add additional security to the Rendition.

3. In the Fetch Access box, leave this set to Normal unless you need to add additional security to the Rendition.

Fetch Access	Definition
<b>Normal</b>	Allows anyone within the selected domain Read access.
<b>Restricted</b>	Automatically removes Read access from the Document. To fetch the Rendition, Document owner must add Users to the Document's access list and assign them Read access, or if a password has been assigned to the Rendition, you must know the password. To add a password to a Rendition, see Modify Rendition. For further assistance, contact the Help Desk.

4. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to create the Rendition.

Notes:

- If the file name has multiple adjacent periods in it, they will be replaced with a single period.
- The file will be stored encrypted if the Document's Category requires it; otherwise it will be stored in its native format.
- A history record will be generated for creation of the Rendition.
- Email will be sent to the notification associated with the Document.
- If this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics, send out email if page count too small on a Metric's Rendition.

#### 4.24.2. Modifying a Rendition

Modify Rendition modifies an existing Rendition's attributes.

- The User must have the Releaser privilege with Read access to the Document or the User must have the Bypass privilege with Owner access to the Document.
- The User must have the Modify Generation privilege.
- The User must have Modify access to the Document/Rendition.

**Navigation:** [*DocMgr > Explorer > Select Desired Document > Select Desired Generation > Side Menu > Modify*]

##### **Step 1:**

1. If applicable, modify the Rendition file name in the File Name box; this is the file name for this Rendition when fetched. The file name extension may not be changed. File name is a required field. The maximum length of this field is 128 characters.

Note: Restricted Fetch Access allows you to add additional security to the Rendition.

2. If applicable, modify the Rendition Fetch access in the Fetch Access box by clicking on the down arrow and selecting it from the list.

Fetch Access	Definition
<b>Normal</b>	Allows anyone within the selected domain Read access.
<b>Restricted</b>	All Read access is removed from the Document. To fetch a Rendition, the Document owner must add users to the document's access list and assign them Read access, or if a password has been assigned to the Rendition, you must know the password.



3. Note: If a password had previously been assigned to this Rendition, the Old Password box will be displayed. To remove the previously assigned password for this Rendition, click the box next to "Remove the password from this Rendition". This will place a check in the box. The Old Password box will not be displayed if a password has not been previously assigned to this Rendition.
4. Note: Assigning a password to this Rendition of the Document allows this Rendition to be fetched by someone who is not logged in to the Document Manager. Anybody can fetch this Rendition using the Document number and password when prompted by his or her web browser.
5. If applicable, assign a Rendition password in the Password box or New Password box if a password had previously been assigned. The password must be at least 8 characters long. The password must contain at least 3 of the 4 different types of characters. The four types of characters are uppercase letter, lowercase letter, digit, and special character.
6. If a password is entered in the Password box or New Password box if a password had previously been assigned, you must verify the Rendition password in the Verify box or New Verify box if a password had previously been assigned. The password and the verify password must match.
7. Enter the reason for modifying this Rendition in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
8. Click the Cancel button to cancel the command, or click the OK button to modify the Rendition.

#### Notes:

- If Document owner forgets the password assigned to this Rendition, contact the Document Administrator. The Document Administrator can remove or change your password but they do not know the password that was originally assigned to this Rendition.
- A history record will be generated for modification of the Rendition.
- E-mail will be sent to the notification associated with the Document.

### 4.24.3. Deleting a Rendition

Delete Rendition deletes a specific Rendition of a Generation. A Rendition of a Generation is the watermarked PDF file of the released Generation. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Delete Generation privilege.
- The User must have Read access to the Document and have the Releaser privilege or have Owner access to the Document and have the Bypass privilege.
- The Rendition cannot be deleted if the Document is reserved or in review.

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Rendition > Side Menu > Delete]

**Step 1:**

The Rendition to be deleted and the Rendition attributes are displayed.

1. Click the Cancel button to cancel the command or click the Next button to continue.

**Step 2:**

The Rendition to be deleted and the Rendition attributes are displayed.

1. Enter the reason for deleting this Rendition in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Rendition.

**Notes:**

- The Rendition record will be deleted.
- A history record will be generated for deletion of the Rendition.
- Email will be sent to the notification associated with the parent Document that the Rendition was deleted under.

#### 4.24.4. Showing a Rendition

Rendition Info shows the full details for a specific Rendition.

##### ***A Specific Rendition***

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Rendition > Side Menu > Show Info]

The User must have Read access to the Document/Generation.












Field Name	Description
Number	The Document number that this Rendition belongs to. Click on the Document number link to return to the Explore view of the Document.
Generation	The number of the Generation this Rendition belongs to.

<b>Gen Releaser</b>	The User that released this Generation. Click the gen releaser name link to display the User Info screen. Note: If this Rendition had been replaced, then this would be the name of the User that replaced the Rendition. Check history to confirm if Rendition was replaced.
<b>Created</b>	The date and time this Rendition was created.
<b>Revision</b>	The revision name assigned to the Rendition when Generation was released.
<b>Released</b>	The date and time Generation was released.
<b>Resident</b>	Yes - The Rendition is resident, meaning that the Rendition is stored in TechDoc. No - The Rendition is not resident, meaning that TechDoc has information about the Rendition but it physically resides somewhere else. For example, a Rendition could be stored in a file cabinet or another computer system.
<b>Gen File Name</b>	The file name for this Rendition when this Rendition is fetched.
<b>File Size</b>	The size in kilobytes of the uncompressed physical file associated with this Rendition.
<b>Mime Type</b>	The Mime Type for this Rendition. For example, for a file extension of .pdf the mime type associated would be application/pdf.
<b>Fetch Access</b>	Normal - No restrictions have been associated to this Rendition. Restricted - Only the Document owner or Users on the Document access list can fetch this Rendition, or if a password has been assigned to this Rendition, you must know the password.
<b>Password</b>	If Fetch Access is Normal or Restricted and no password has been assigned to this Rendition, the following message will be displayed: "No password for fetching has been assigned." If Fetch Access is Normal or Restricted and password has been assigned to this Rendition, the following message will be displayed: "Anybody can fetch this Rendition using the Document number and password when prompted by their web browser."
<b>File Path</b>	The full file name and location of the Generation file stored on the server. Note: Only an Admin can view the file path of a Generation file.
<b>Encrypted</b>	Indicates if this file has been stored encrypted.

	<p>Note: Files uploaded will now be encrypted if the Document's Category specifies this as a requirement. This process is transparent to the end User. When a file is uploaded, the system encrypts the file and places it in the File Area encrypted. When a file is fetched, an unencrypted copy is sent. This is also true for rendered generations. When a file is rendered, the PDF is encrypted. When a User goes to fetch the PDF, an unencrypted copy is sent.</p> <p>Yes - File has been stored encrypted. No - File has not been stored encrypted.</p>
<p><b>RMA Record</b></p>	<p>Yes - One or more RMA Records currently exist for this Generation. No - This Generation does not have any RMA Records for it in the system.</p>

Metric Info

Note: This help will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

Field Name	Description
<p><b>Metric Status</b></p>	<p>The current status of this Generation. Note: This field will only be displayed if it has a Metric status icon.</p> <p>A Metric status can be:</p> <ul style="list-style-type: none"> <li> Inactive</li> <li> Green - Improving</li> <li> Green - Staying Constant</li> <li> Green - Worsening</li> <li> Yellow - Improving</li> <li> Yellow - Staying Constant</li> <li> Yellow - Worsening</li> <li> Red - Improving</li> <li> Red - Staying Constant</li> <li> Red - Worsening</li> </ul> <p>A late Metric icon will be displayed as opaque. For example: </p>

	<p>Stoplight Criteria</p> <p>Green represents progress according to plan.</p> <p>Yellow represents an area of concern.</p> <p>Red represents a significant problem.</p>
<b>Metric Date</b>	<p>The Metric date of this Generation. The Metric date is usually the reporting end date for the Metric. Note: An active Metric is required to have a date. If this Generation is inactive, the Metric date field will be blank. This field will only be displayed if it has a Metric status icon.</p>

#### 4.24.5. Replacing a Rendition

Replace Rendition allows a User with the appropriate privileges the ability to replace a Rendition for a released Generation. A Rendition of a Generation is the watermarked PDF file of the released Generation.

- The User must have the Releaser privilege with Read access to the Document or the User must have the Bypass privilege with Owner access to the Document.
- The Generation must be released.
- The replacement file must be a PDF file.
- Replacement Rendition must contain any applicable watermark.

**Navigation:** [DocMgr > Explorer > Select Desired Document > Select Desired Rendition > Side Menu > Replace]

##### Step 1:

1. Enter the reason for replacing the Rendition in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command or click the Next button to continue.

##### Step 2:

1. At the File box click on the Browse... button to locate the Rendition to be replaced in the Document Manager.

Note: The File Upload box will be displayed. The replacement file must be a PDF file. The replacement rendition must contain any applicable watermark.

2. In the File Upload box, select the drive/folder where the Rendition to be replaced in the Document Manager is located. To display all of the files in the folder, in the Files of type box, click on the down arrow and select All Files (\*.\*). Click on the Rendition to be

replaced in the Document Manager. This will automatically insert the filename in the File name box. Click the Open button.

Note: Restricted Fetch Access allows you to add additional security to the Rendition.

3. In the Fetch Access box, leave this set to Normal unless you need to add additional security to the Rendition.

Fetch Access	Definition
<b>Normal</b>	Allows anyone within the selected domain Read access.
<b>Restricted</b>	Automatically removes Read access from the Document. To the fetch Rendition, the Document owner must add Users to the Document's access list and assign them Read access, or if a password has been assigned to the Rendition you must know the password. To add a password to a Rendition, see Modify Rendition. For further assistance, contact the Help Desk.

4. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to replace the Rendition.

#### Notes:

- If the file name has multiple adjacent periods in it, they will be replaced with a single period.
- The file will be stored encrypted if the Document's Category requires it; otherwise, it will be stored in its native format.
- A history record will be generated for replacement of the Rendition.
- Email will be sent to the notification associated with the document.
- If this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics, send out email if page count too small on a Metric's Rendition.

## 4.25. Reports

Reports are used to view the current objects contained within TechDoc. Reports can be customized to display specific fields from a specific object type (Documents, Generations, Users, etc). In addition, a User can specify the ordering and selection criteria for the contents of the Report. Several different output formats are available (CSV, HTML, and XML), which facilitate both viewing and exporting of information.

### 4.25.1. Creating a Report

Create Report creates a new Report in the Document Manager. Reports can be created from various tables; for example, Documents, Folders, Generations, Groups, Users, etc.

- The User must have the Reports privilege.

**Navigation:** [*DocMgr > Reports > Side Menu > Create*]

#### Step 1:

1. Enter the Report name in the Name box. Report names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 64 characters.
2. Enter the description of the Report in the Description box. The description will be displayed as the title of the Report. This is a required field. The maximum length of this field is 128 characters.
3. Select the Report type in the Report Type box by clicking on the down arrow and selecting it from the list.

<b>Private</b>	Created for your use only.
<b>Shared</b>	Created for anyone to use.

4. Select whether or not to show the headings of Report in the Show Headings box by clicking on the down arrow and selecting Yes or No from the list. Headings are the titles over each column when Report is displayed.

<b>No</b>	Headings will not be displayed on Report.
<b>Yes</b>	Headings will be displayed on Report.

5. Select the Report owner in the Owner box by clicking on the down arrow and selecting a name from the list.

Only an Admin can assign the owner of a Report. A table is the item (i.e. Document, Folder, User, etc.) a User can select to create a Report.

6. Select the table of Report in the Table box by clicking on the down arrow and selecting it from the list. You must select a table. This field cannot be left as Choose One.
7. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

Data fields are all the fields available for the table (Document, Folder, User etc.) that was selected from the previous screen. Select the data fields that you want to show on the Report.

- The ID field is available for selection for all tables that have an ID field (Network Addresses and System Properties do not have ID fields). The ID field is only available for Admins.
  - You must select one or more data fields before continuing to the next screen.
1. Select the data field in the Available Data Fields column to be displayed on the Report by clicking on the data field. This will highlight the data field.
  2. Click the Add> button. The Add> button moves the highlighted data field to the Selected Data Fields column. To remove a data field from the Selected Data Fields column, highlight the data field and click the <Remove button. The <Remove All button removes all the data fields from the Selected Data Fields column. Once the data fields are in the Selected Data Fields column, you can select the order they will be displayed in the Report. To move a data field up, click on the data field to be moved up, and then click on the Move Up button. To move a data field down, click on the data field to be moved down, and then click on the Move Down button.
  3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 3:

The Ordered Data Fields column is the order in which the data fields will be sorted. If no data fields are in the Ordered Data Fields column, the Report will not be sorted.

1. Select the data field in the Unordered Data Fields column by clicking on the data field. This will highlight the data field.

Reports can be sorted in Ascending or Descending order.

2. Select the order to sort the Report. Ascending is the default. If the Report is to be sorted in Descending order, click the down arrow next to Ascending and select Descending.
3. Click the Add> button. The Add> button moves the highlighted data field to the Ordered Data Fields column. To remove a data field from the Ordered Data Fields column, highlight the data field and click the <Remove button. The <Remove All button removes all the data fields from the Ordered Data Fields column. Once the data fields are in the Ordered Data Fields column, you can select the order they will be sorted in the Report. To move a data field up, click on the data field to be moved up, and then click on the Move Up button. To move a data field down, click on the data field to be moved down, and then click on the Move Down button.
4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.



## Step 4:

If necessary, you can further refine your search criteria by selecting additional data fields. If you do not wish to refine the search criteria, click the Next button to continue.

- Depending on the table being used to create the Report (Document, Folder, etc.), additional fields other than New Criteria will be displayed. For example, if you are creating a Report for Documents, Keyword will be displayed.
- Keyword provides the capability to search for asterisk. For example, if the Keyword is a dropdown you can select the asterisk (\*) to bring back all the values for a specific Keyword.
- Dates allow a range capability to specify a time frame without having to set a concrete date such as 01/01/1995. In this way one can specify a time frame such as the Last 30 Days and each time a report is run, that field's date range will target the last 30 days and the user will not have to modify the report each time before it's run to adjust a concrete date range to target the last 30 days. To specify a date range, first select the range operator [x] and then select or enter a range in one of the following formats:

<b>Last Day/Last X Days</b>	The "Last Day" targets everything from the beginning of yesterday at 00:00 to the end of the day today at 23:59. Additional days can be added to this using the "Last X Days" format where X is the number of days.
<b>Last Week/Last X Weeks</b>	The "Last Week" targets everything from the beginning of last week till the end of that week. A week starts on a Sunday at 00:00 and ends on a Saturday at 23:59. For example if the current day is a Wednesday, the range will back all the way up to the last complete week starting on a Sunday. Additional weeks can be added to this using the "Last X Weeks" format where X is the number of weeks.
<b>Last Month/Last X Months</b>	The "Last Month" targets everything from the beginning of last month till the end of that month. A month starts on the first day at 00:00 and ends on the last day at 23:59. For example if the current month is October, the range will back all the way up to the last complete month starting on September 1st and ending on September 30th. Additional months can be added to this using the "Last X Months" format where X is the number of months.
<b>Last Quarter/Last X Quarters</b>	The "Last Quarter" targets everything from the beginning of the last quarter till the end of that quarter. A quarter starts on the first day of that quarter at 00:00 and ends on the last day of the quarter at 23:59. For reference, there are 4 quarters in a year: Jan 1st - March 31th, April 1st - June 30th,

	<p>July 1st - September 30th and October 1st - December 31th. For example if the current month is October, the range will back all the way up to the last complete quarter starting on July 1st and ending on September 30th. Additional quarters can be added to this using the "Last X Quarters" format where X is the number of quarters.</p>
<p><b>Last Year/Last X Years</b></p>	<p>The "Last Year" targets everything from the beginning of the last year till the end of that year. A year starts on the first day of that year at 00:00 and ends on the last day of that year at 23:59. For reference, a year begins on January 1st and ends on December 31th. For example if it is January 2nd 2019, the range will back all the way up to the last complete year January 1st 2018 - December 31th 2018. Additional years can be added to this using the "Last X Years" format where X is the number of years.</p>

- A parentheses dropdown is added to each row of search criteria. You can choose up to 5 left and 5 right parentheses on each criterion line to allow for nesting. The number of left and right parentheses must match. If your search criteria do not require the use of parentheses, leave this field blank. An example of parentheses might be:

Date > 1/1/2002 and Date < 2/1/2002 and (Command=Log In or Command=Log Out or IP=128.xxx.x.x)

1. In the New Criteria box, click on the down arrow and select a data field from the list.
2. Click the Add button.

**Note:**

- When a New Criteria is selected, the data field will be displayed along with four additional dropdown fields.
- The first and last fields are parentheses dropdowns. A parentheses dropdown is added to each row of search criteria. You can choose up to 5 left and 5 right parentheses on each criterion line to allow for nesting. The number of left and right parentheses must match. Note: If your search criteria do not require the use of parentheses, leave this field blank.
- The second field is a dropdown that can list some or all of the following operators: = (Equal to), <> (Not equal), < (Less than), <= (Less than or equal to), > (Greater than), >= (Greater than or equal to) or [x] (Range). Select the desired operator.
- The third field is where you enter the value for the New Criteria or Keyword if the Document table was selected. A column can also be set to 'equal' or 'not

- equal' and have the value left blank. This enables the comparison of columns that are empty (or null as it's known in database terminology).
  - If more than one New Criteria is selected, a join operator (AND, OR, AND NOT) dropdown will be displayed. Select the desired join operator.
  - To remove the data field, click the Remove button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 5:

The Report can be previewed and saved in the following formats: CSV (Comma Separated Values), HTML (Hypertext Markup Language), and XML (eXtensible Markup Language). The Report Name, Date Run, Report Criteria, Report Order, and the Number of Records Displayed are shown at the bottom of the Report.

1. In the Preview As box click on CSV, HTML, or XML to display the Report. When the Report is displayed, it can be saved to your pc or printed. The Report is not created in the Document Manager until you click the OK button.

#### Notes:

- If HTML (Hypertext markup Language) format is chosen, a separate browser window will open with Report data in HTML format.
  - If XML (eXtensible Markup Language) format is chosen, depending on the browser, either a separate browser window will open with the Report data in XML format or a File Save As dialog window will open prompting the User to specify a location and file name for the XML file. If the User specifies a valid folder, then a XML file will be created in that folder with the name specified.
  - If CSV (Comma Separated Value) format is chosen, a File Save As dialog window will open prompting the User to specify a location and file name for the CSV file. If the User specifies a valid folder, then a CSV file will be created in that folder with the name specified.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Report.

### 4.25.2. Modifying a Report

Modify Report allows a User to modify an existing Report in the Document Manager.

- The User must have the Reports privilege.
- The User must have Modify access to the Report. Modify access is determined by the User being an Admin or the actual owner of the Report.

**Navigation:** [DocMgr > Reports > Select Desired Report > Side Menu > Modify]

**Step 1:**

1. If applicable, modify the Report name in the Name box. Report names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 64 characters.
2. If applicable, modify the description of the Report in the Description box. The description will be displayed as the title of the Report. This is a required field. The maximum length of this field is 128 characters.
3. If applicable, modify Report type in the Report Type box by clicking on the down arrow and selecting it from the list.

<b>Private</b>	Created for your use only.
<b>Shared</b>	Created for anyone to use.

4. If applicable, modify the show headings setting of Report in the Show Headings box by clicking on the down arrow and selecting Yes or No from the list. Headings are the titles over each column when Report is displayed.

<b>No</b>	Headings will not be displayed on Report.
<b>Yes</b>	Headings will be displayed on Report.

5. If applicable, modify the Report owner in the Owner box by clicking on the down arrow and selecting a name from the list.

Only an Admin can assign the owner of a Report. A table is the item (i.e. Document, Folder, User, etc.) a User can select to create a Report.

6. If applicable, modify the table of Report in the Table box by clicking on the down arrow and selecting it from the list. You must select a table. This field cannot be left as Choose One.
7. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

Modify data fields, as required. Data fields are all the fields available for the table (Document, Folder, User etc.) that was selected from the previous screen. Select the data fields that you want to show on the Report.

- The ID field is available for selection for all tables that have an ID field (Network Addresses and System Properties do not have ID fields). The ID field is only available for Admins.
  - You must select one or more data fields before continuing to the next screen.
1. Select the data field in the Available Data Fields column to be displayed on the Report by clicking on the data field. This will highlight the data field.
  2. Click the Add> button. The Add> button moves the highlighted data field to the Selected Data Fields column. To remove a data field from the Selected Data Fields column, highlight the data field and click the <Remove button. The <Remove All button removes all the data fields from the Selected Data Fields column. Once the data fields are in the Selected Data Fields column, you can select the order they will be displayed in the Report. To move a data field up, click on the data field to be moved up and then click on the Move Up button. To move a data field down, click on the data field to be moved down and then click on the Move Down button.
  3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 3:

Modify sort criteria, as required. The Ordered Data Fields column is the order in which the data fields will be sorted. If no data fields are in the Ordered Data Fields column, the Report will not be sorted.

1. Select the data field in the Unordered Data Fields column by clicking on the data field. This will highlight the data field.

Reports can be sorted in Ascending or Descending order.

2. Select the order to sort the Report. Ascending is the default. If the Report is to be sorted in Descending order, click the down arrow next to Ascending and select Descending.
3. Click the Add> button. The Add> button moves the highlighted data field to the Ordered Data Fields column. To remove a data field from the Ordered Data Fields column, highlight the data field and click the <Remove button. The <Remove All button removes all the data fields from the Ordered Data Fields column. Once the data fields are in the Ordered Data Fields column, you can select the order they will be sorted in the Report. To move a data field up, click on the data field to be moved up and then click on the Move Up button. To move a data field down, click on the data field to be moved down and then click on the Move Down button.
4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 4:

If necessary, you can further refine your search criteria by selecting additional data fields. If you do not wish to refine the search criteria, click the Next button to continue.

- Depending on the table being used to create the Report (Document, Folder, etc.), additional fields other than New Criteria will be displayed. For example, if you are creating a Report for Documents, Keyword will be displayed.
- Keyword provides the capability to search for asterisk. For example, if the Keyword is a dropdown you can select the asterisk (\*) to bring back all the values for a specific Keyword.
- Dates allow a range capability to specify a time frame without having to set a concrete date such as 01/01/1995. In this way one can specify a time frame such as the Last 30 Days and each time a report is run, that field's date range will target the last 30 days and the user will not have to modify the report each time before it's run to adjust a concrete date range to target the last 30 days. To specify a date range, first select the range operator [x] and then select or enter a range in one of the following formats:

<p><b>Last Day/Last X Days</b></p>	<p>The "Last Day" targets everything from the beginning of yesterday at 00:00 to the end of the day today at 23:59. Additional days can be added to this using the "Last X Days" format where X is the number of days.</p>
<p><b>Last Week/Last X Weeks</b></p>	<p>The "Last Week" targets everything from the beginning of last week till the end of that week. A week starts on a Sunday at 00:00 and ends on a Saturday at 23:59. For example if the current day is a Wednesday, the range will back all the way up to the last complete week starting on a Sunday. Additional weeks can be added to this using the "Last X Weeks" format where X is the number of weeks.</p>
<p><b>Last Month/Last X Months</b></p>	<p>The "Last Month" targets everything from the beginning of last month till the end of that month. A month starts on the first day at 00:00 and ends on the last day at 23:59. For example if the current month is October, the range will back all the way up to the last complete month starting on September 1st and ending on September 30th. Additional months can be added to this using the "Last X Months" format where X is the number of months.</p>
<p><b>Last Quarter/Last X Quarters</b></p>	<p>The "Last Quarter" targets everything from the beginning of the last quarter till the end of that quarter. A quarter starts on the first day of that quarter at 00:00 and ends on the last day of the quarter at 23:59. For reference, there are 4 quarters in a year: Jan 1st - March 31th, April 1st - June 30th, July 1st - September 30th and October 1st - December 31th. For example if the current month is October, the range will</p>

	back all the way up to the last complete quarter starting on July 1st and ending on September 30th. Additional quarters can be added to this using the "Last X Quarters" format where X is the number of quarters.
<b>Last Year/Last X Years</b>	The "Last Year" targets everything from the beginning of the last year till the end of that year. A year starts on the first day of that year at 00:00 and ends on the last day of that year at 23:59. For reference, a year begins on January 1st and ends on December 31th. For example if it is January 2nd 2019, the range will back all the way up to the last complete year January 1st 2018 - December 31th 2018. Additional years can be added to this using the "Last X Years" format where X is the number of years.

- A parentheses dropdown is added to each row of search criteria. You can choose up to 5 left and 5 right parentheses on each criterion line to allow for nesting. The number of left and right parentheses must match. If your search criteria do not require the use of parentheses, leave this field blank. An example of parentheses might be:

Date > 1/1/2002 and Date < 2/1/2002 and (Command=Log In or Command=Log Out or IP=128.xxx.x.x)

1. In the New Criteria box, click on the down arrow and select a data field from the list.
2. Click the Add button.

**Note:**

- When a New Criteria is selected, the data field will be displayed along with four additional dropdown fields.
- The first and last fields are parentheses dropdowns. A parentheses dropdown is added to each row of search criteria. You can choose up to 5 left and 5 right parentheses on each criterion line to allow for nesting. The number of left and right parentheses must match. If your search criteria do not require the use of parentheses, leave this field blank.
- The second field is a dropdown that can list some or all of the following operators: = (Equal to), <> (Not equal), < (Less than), <= (Less than or equal to), > (Greater than), >= (Greater than or equal to) or [x] (Range). Select the desired operator.
- The third field is where you enter the value for the New Criteria or Keyword if the Document table was selected. A column can also be set to 'equal' or 'not equal' and have the value left blank. This enables the comparison of columns that are empty (or null as it's known in database terminology).

- If more than one New Criteria is selected, a join operator (AND, OR, AND NOT) dropdown will be displayed. Select the desired join operator.
  - To remove the data field, click the Remove button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 5:

The Report can be previewed and saved in the following formats: CSV (Comma Separated Values), HTML (Hypertext Markup Language), and XML (eXtensible Markup Language). The Report Name, Date Run, Report Criteria, Report Order, and the Number of Records Displayed are shown at the bottom of the Report.

1. In the Preview As box click on CSV, HTML, or XML to display the Report. When the Report is displayed, it can be saved to your pc or printed. The Report is not created in the Document Manager until you click the OK button.

#### Notes:

- If HTML (Hypertext markup Language) format is chosen, a separate browser window will open with Report data in HTML format.
  - If XML (eXtensible Markup Language) format is chosen, depending on the browser, either a separate browser window will open with the Report data in XML format or a File Save As dialog window will open prompting the User to specify a location and file name for the XML file. If the User specifies a valid folder, then a XML file will be created in that folder with the name specified.
  - If CSV (Comma Separated Value) format is chosen, a File Save As dialog window will open prompting the User to specify a location and file name for the CSV file. If the User specifies a valid folder, then a CSV file will be created in that folder with the name specified.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to modify the Report.

### 4.25.3. Deleting a Report

Delete Report deletes an existing Report in the Document Manager.

- The User must have the Reports privilege.
- The User must have Delete access to the Report. Delete access is determined by the User being an Admin or the actual owner of the Report.

**Navigation:** *[DocMgr > Reports > Select Desired Report > Side Menu > Delete]*

#### Step 1:



The Report to be deleted and the Report attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

Step 2:

The Report to be deleted and the Report attributes are displayed.

1. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Report.



#### 4.25.4. Showing Reports

Show Report displays Reports created in the Document Manager.

##### ***Admin Reports***

***Navigation:*** [\[DocMgr > Reports > Side Menu > Admin Reports\]](#)



Show Admin Reports displays Reports created in the Document Manager by Users with Admin privilege. Only an Admin can view Admin Reports.

- The Name and Description are displayed for each Report.
- The number of Reports is shown.
- Reports are displayed in alphabetical order by the Report name.
- Click on  to View the specific Report.
- Click on  to Show Info for the specific Report.
- The User must have the Admin privilege.

All Reports

***Navigation:*** [\[DocMgr > Reports > Side Menu > All Reports\]](#)

All Reports displays all the Reports (including Admin Reports, My Reports, Shared Reports, etc) that have been created in the Document Manager. Private Reports are available for your use only. Shared Reports are available for anyone to use. Only an Admin can display all Reports in the Document Manager.



- The Name and Description are displayed for each Report.
- The number of Reports is shown.
- Reports are displayed in alphabetical order by the Report name.
- Click on  to View the specific Report.
- Click on  to Show Info for the specific Report.

- The User must have the Admin privilege.

### My Reports

**Navigation:** [DocMgr > Reports > Side Menu > My Reports]



My Reports displays all the Reports, both private and shared, that you have created in the Document Manager. Private Reports are available for your use only. Shared Reports are available for anyone to use. If you have not created a Report in the Document Manager, the following message will be displayed: "You don't have any Reports."

- The Name and Description are displayed for each Report.
- The number of Reports is shown.
- The Reports are displayed in alphabetical order by the Report name.
- Click on  to View the specific Report.
- Click on  to Show Info for the specific Report.
- The User must have the Reports privilege.

### Shared Reports

**Navigation:** [DocMgr > Reports > Side Menu > Shared Reports]

Shared Reports displays all the Shared Reports, including your Shared Reports that have been created in the Document Manager. Shared Reports are available for anyone to use.

- The Name and Description are displayed for each Report.
- The number of Reports is shown.
- The Reports are displayed in alphabetical order by the Report name.
- Click on  to View the specific Report.
- Click on  to Show Info for the specific Report.
- The User must have the Reports privilege.

### A Specific Report

**Navigation:** [DocMgr > Reports > Select Desired Report]

Report Info displays the full details for a specific Report.

The User must have Read access to the Report. Read access is given to an Admin, the actual owner of the Report, or to anyone if the Report is a Shared Report.

<b>Name</b>	The name of this Report.
<b>Description</b>	The description of this Report.

<b>Owner</b>	The User that owns this Report. Click the owner's name link to display the User Info screen.
<b>Report Type</b>	Private - Created for your use only. Shared - Created for anyone to use.
<b>Show Headings</b>	Yes - Headings will display on Report. No - Headings will not display on Report.
<b>Created</b>	The date and time this Report was created.
<b>Table</b>	The table used to create this Report; for example, Documents, Folders, Users, etc.
<b>Data Fields</b>	The data fields used to create this Report.
<b>Order By</b>	The data fields used to sort this Report.
<b>Criteria</b>	The criteria used for creating this Report. If no criteria were used to create this Report, this field will not be displayed.

On the Report side menu, click the SQL link to view the SQL Select Clause. (Clicking the SQL link will add the SQL Select Clause at the bottom of the Report Info screen). The SQL select clause is the actual SQL Select statement that is executed on the database to retrieve the data for the Report. The SQL link is only available for Admins.

#### Run a Report

**Navigation:** [DocMgr > Reports > Select Desired Report > Side Menu > Run]

Run Report executes an existing Report. The Report can be previewed in the following formats: CSV (Comma Separated Values), HTML (Hypertext Markup Language), and XML (Extensible Markup Language). The Report Name, Date Run, Report Criteria, Report Order, and the Number of Records Displayed are shown at the bottom of the Report.

- The User must have the Reports privilege.
  - The User must have Read access to the Report. Read access is given to an Admin, the actual owner of the Report, or to anyone if the Report is a Shared Report.
1. At Run As, click on CSV, HTML, or XML to execute the Report.

#### Notes:

- If HTML (Hypertext markup Language) format is chosen, a separate browser window will open with Report data in HTML format.
- If XML (eXtensible Markup Language) format is chosen, depending on the browser, either a separate browser window will open with the Report data in XML format or a

File Save As dialog window will open prompting the User to specify a location and file name for the XML file. If the User specifies a valid folder, then a XML file will be created in that folder with the name specified.

- If CSV (Comma Separated Value) format is chosen, a File Save As dialog window will open prompting the User to specify a location and file name for the CSV file. If the User specifies a valid folder, then a CSV file will be created in that folder with the name specified.

Report Info displays the full details for a specific Report.

<b>Name</b>	The name of this Report.
<b>Description</b>	The description of this Report.
<b>Owner</b>	The User that owns this Report. Click the owner's name link to display the User Info screen.
<b>Report Type</b>	Private - Created for your use only. Shared - Created for anyone to use.
<b>Show Headings</b>	Yes - Headings will display on Report. No - Headings will not display on Report.
<b>Created</b>	The date and time this Report was created.
<b>Table</b>	The table used to create this Report; for example, Documents, Folders, Users, etc.
<b>Data Fields</b>	The data fields used to create this Report.
<b>Order By</b>	The data fields used to sort this Report.
<b>Criteria</b>	The criteria used for creating this Report. If no criteria were used to create this Report, this field will not be displayed.

On the Report side menu, click the SQL link to view the SQL Select Clause. Clicking the SQL link will add the SQL Select Clause at the bottom of the Report Info screen. The SQL select clause is the actual SQL Select statement that is executed on the database to retrieve the data for the Report. The SQL link is only available for Admins.

#### 4.25.5. Copying a Report

Copy Report creates a new Report by copying the information from an existing Report and allowing it to be modified before saving the new Report.

- The User must have the Reports privilege.
- The User must have Read access to the existing Report.

- Only Admins can change the owner of the Report.
- The name of the new Report cannot be the same as any other Report.

**Navigation:** [DocMgr > Reports > Select Desired Report > Side Menu > Copy]

**Step 1:**

1. Enter the Report name in the Name box. Report names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 64 characters.
2. If applicable, modify the description of the Report in the Description box. The description will be displayed as the title of the Report. This is a required field. The maximum length of this field is 128 characters.
3. If applicable, modify the Report type in the Report Type box by clicking on the down arrow and selecting it from the list.

<b>Private</b>	Created for your use only.
<b>Shared</b>	Created for anyone to use.

4. If applicable, modify the show headings setting of Report in the Show Headings box by clicking on the down arrow and selecting Yes or No from the list. Headings are the titles over each column when Report is displayed.

<b>No</b>	Headings will not be displayed on Report.
<b>Yes</b>	Headings will be displayed on Report.

5. If applicable, modify the Report owner in the Owner box by clicking on the down arrow and selecting a name from the list.

A table is the item (i.e. Document, Folder, User, etc.) a User can select to create a Report.

6. If applicable, modify the table of Report in the Table box by clicking on the down arrow and selecting it from the list. You must select a table. This field cannot be left as Choose One.
7. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

Modify data fields, as required. Data fields are all the fields available for the table (Document, Folder, User etc.) that was selected from the previous screen. Select the data fields that you want to show on the Report.

- The ID field is available for selection for all tables that have an ID field (Network Addresses and System Properties do not have ID fields). The ID field is only available for Admins.
  - You must select one or more data fields before continuing to the next screen.
1. Select the data field in the Available Data Fields column to be displayed on the Report by clicking on the data field. This will highlight the data field.
  2. Click the Add> button. The Add> button moves the highlighted data field to the Selected Data Fields column. To remove a data field from the Selected Data Fields column, highlight the data field and click the <Remove button. The <Remove All button removes all the data fields from the Selected Data Fields column. Once the data fields are in the Selected Data Fields column, you can select the order they will be displayed in the Report. To move a data field up, click on the data field to be moved up and then click on the Move Up button. To move a data field down, click on the data field to be moved down and then click on the Move Down button.
  3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 3:

Modify sort criteria, as required. The Ordered Data Fields column is the order in which the data fields will be sorted. If no data fields are in the Ordered Data Fields column, the Report will not be sorted.

1. Select the data field in the Unordered Data Fields column by clicking on the data field. This will highlight the data field.

Note: Reports can be sorted in Ascending or Descending order.

2. Select the order to sort the Report. Ascending is the default. If the Report is to be sorted in Descending order, click the down arrow next to Ascending and select Descending.
3. Click the Add> button. The Add> button moves the highlighted data field to the Ordered Data Fields column. To remove a data field from the Ordered Data Fields column, highlight the data field and click the <Remove button. The <Remove All button removes all the data fields from the Ordered Data Fields column. Once the data fields are in the Ordered Data Fields column, you can select the order they will be sorted in the Report. To move a data field up, click on the data field to be moved up and then click on the Move Up button. To move a data field down, click on the data field to be moved down and then click on the Move Down button.
4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 4:

If necessary, you can further refine your search criteria by selecting additional data fields. If you do not wish to refine the search criteria, click the Next button to continue.

- Depending on the table being used to create the Report (Document, Folder, etc.), additional fields other than New Criteria will be displayed. For example, if you are creating a Report for Documents, Keyword will be displayed.
- Keyword provides the capability to search for asterisk. For example, if the Keyword is a dropdown you can select the asterisk (\*) to bring back all the values for a specific Keyword.
- A parentheses dropdown is added to each row of search criteria. You can choose up to 5 left and 5 right parentheses on each criterion line to allow for nesting. The number of left and right parentheses must match. If your search criteria do not require the use of parentheses, leave this field blank. An example of parentheses might be:

Date > 1/1/2002 and Date < 2/1/2002 and (Command=Log In or Command=Log Out or IP=128.xxx.x.x)

1. In the New Criteria box, click on the down arrow and select a data field from the list.
2. Click the Add button.

Note:

- When a New Criteria is selected, the data field will be displayed along with four additional dropdown fields.
  - The first and last fields are parentheses dropdowns. A parentheses dropdown is added to each row of search criteria. You can choose up to 5 left and 5 right parentheses on each criterion line to allow for nesting. The number of left and right parentheses must match. If your search criteria do not require the use of parentheses, leave this field blank.
  - The second field is a dropdown that can list some or all of the following operators: = (Equal to), <> (Not equal), < (Less than), <= (Less than or equal to), > (Greater than), >= (Greater than or equal to). Select the desired operator.
  - The third field is where you enter the value for the New Criteria or Keyword if the Document table was selected. Note: A column can also be set to 'equal' or 'not equal' and have the value left blank. This enables the comparison of columns that are empty (or null as it's known in database terminology).
  - If more than one New Criteria is selected, a join operator (AND, OR, AND NOT) dropdown will be displayed. Select the desired join operator.
  - To remove the data field, click the Remove button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

Step 5:

The Report can be previewed and saved in the following formats: CSV (Comma Separated Values), HTML (Hypertext Markup Language), and XML (eXtensible Markup Language). The Report Name, Date Run, Report Criteria, Report Order, and the Number of Records Displayed are shown at the bottom of the Report.

1. In the Preview As box click on CSV, HTML, or XML to display the Report. When the Report is displayed, it can be saved to your pc or printed. The Report is not created in the Document Manager until you click the OK button.

Notes:

- If HTML (Hypertext markup Language) format is chosen, a separate browser window will open with Report data in HTML format.
  - If XML (eXtensible Markup Language) format is chosen, depending on the browser, either a separate browser window will open with the Report data in XML format or a File Save As dialog window will open prompting the User to specify a location and file name for the XML file. If the User specifies a valid folder, then a XML file will be created in that folder with the name specified.
  - If CSV (Comma Separated Value) format is chosen, a File Save As dialog window will open prompting the User to specify a location and file name for the CSV file. If the User specifies a valid folder, then a CSV file will be created in that folder with the name specified.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to copy the Report.

#### 4.25.6. Running a Report

Run Report is used to run a Report and output it in the specified format. Currently, reports can be outputted in CSV, HTML, and XML. The Report will be custom tailored to display only the data columns you requested that match your criteria on the table specified.

**Navigation:** *[DocMgr > Reports > Select Desired Report > Side Menu > Run]*

#### 4.26. Reviews

Reviews are used to provide a user-friendly mean to conduct online Reviews of Documents with simultaneous coordination capability. Users with TechDoc accounts that are members of a Review will be granted Read access to the Document in Review and to all attributes of the Review itself, along with the capability to vote on the Review. Remote Users that are members of a Review have the capability to vote on that Review. The Review itself is completely flexible and modifiable by the Review Leader at any time during the Review.



### 4.26.1. Creating a Review

Create Review creates a new Review in the Document Manager. When a Review is created for a Document it is not automatically started, it is put into the Created, Not Started state. In this state, the Review Leader or an Admin can make modifications to the Review's settings, Review Levels and/or Subteams before the Review is started.

Create Review takes a snapshot of the Review Team and all of its members. Any changes made to the Review Team or any Groups on the Review Team will not be reflected on any existing Reviews.

Email is sent to users on the notification list for this Document informing them that the Document has been placed into Review. Note: After a Review is created, voting does not start until the Review is started.

- The User must have Read access to the Document.
- The User must have the Review Leader privilege.
- The Document must not be reserved.
- The Document must not currently be in Review.
- The Document's latest Generation must not be released.

**Navigation:** [*DocMgr > Explorer > Select Desired Document > Side Menu > Create Review*]

#### **Step 1:**

1. Enter the Review Leader in the Review Leader box by clicking on the down arrow and selecting a name from the list. Only an Admin can assign the Leader of a Review.
2. Enter the Review Team in the Review Team box by clicking on the down arrow and selecting it from the list. This is a list of all your Review Teams and all Shared Review Teams. Review Team is the Subteam(s)/User(s) and the order that they will Review this Document. To display the Review Team selected, click on the Show Review Team button.
3. Enter the revision of the Document in the Revision box. This is a required field. The maximum length of this field is 32 characters. The name entered is the name of the revision for the Generation being reviewed. When the Review is complete, this revision will be stamped on the Document/Generation. The revision cannot be the same as any other released Generations of the Document.
4. In the Allow Reserve and Replace box click on the down arrow and select who will be allowed to reserve and replace this Document during the Review process. When a Document is reserved and replaced during a Review, a minor Generation of the Document will be created. For example, when a Document is replaced the Generation will be 1.1. No - this Document is not allowed to be reserved and replaced during the Review process; Review Leader- only the Review Leader is allowed to reserve and replace this Document during the Review process; or Review Leader and Document

Owner - only the Review Leader or the Document owner are allowed to reserve and replace this Document during the Review process. You cannot leave this field as Choose One.

5. By default, check to subscribe the Review Leader to all Discussions for this Review is checked. Uncheck the box if you do not want the Review Leader to be subscribed to all Discussions for this Review.
6. In the Allow Open Posting box click on the down arrow and select Yes (Anyone can post Discussion to this Document during the Review. Must have read access to the Document) or No (Only Review members and Admin can post Discussions to this Document during the Review). You cannot leave this field as Choose One.
7. If applicable, enter a text message in the Voter Instructions box. This text is sent out in email notification to Voters.
8. Enter the reason for creating the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the OK button to create the Review.

Note:

- A new Review is created with an initial state of Created, Not Started.
- If the "Subscribe the Review Leader to all Discussions for this Review." checkbox is checked, then the Review Leader will be subscribed to all Discussion on the Review.
- If a Review Team was selected, all Levels, Voters and Subteams from the Review Team are copied to the new Review.
- The Document is placed in Review.
- A history record is generated for the creation of the new Review.
- Email is sent to the Document notification list informing them that the Document has been placed into Review.
- Email is sent to notify the Review Leader if he/she is not the current User.
- If Document is a Metric and the MetricRevisionFormat System Property has a value, a "Use: MMM-dd-yyyy" message will be displayed just to the right of the revision.

#### 4.26.2. Creating a Review Level

Create Review Level creates a new Level for the Review.

- The User must have the Review Leader privilege.
- The User must be the Review Leader of the Review or an Admin.
- The Review must be in one of the following states: Paused or Created, Not Started
- A Level must have at least one voting entity assigned to it.
- Users and/or Subteams can be on more than one Level.

**Navigation:** [[DocMgr](#) > [Reviews](#) > [Select Desired Review](#) > [Side Menu](#) > [Create Level](#)]

**Step 1:**

1. In the Auto Concur box click the down arrow and select Yes (allow auto concur for this Level) or No (do not allow auto concur for this Level). You cannot leave this field as Choose One. Auto concur indicates if votes on this Level are to be marked 'Auto Concur' when the max duration is reached. For example, If Max Duration is set to 1 week and 'Auto Concur' is set to 'Yes'; if required Votes Needed for this Level is not met when the due date (which is calculated using the max duration) is reached, the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period. If Auto Concur is Yes and Max Duration is blank then the Auto Concur has no effect.
2. In the Auto Promote box click the down arrow and select Yes (allow auto promote for this Level) or No (do not allow auto promote for this Level). You cannot leave this field as Choose One. Auto Promote indicates if the Review will automatically advance to the next Level when the required votes for this Level are received.
  - Review Leader is notified throughout the Review when the Review goes from one Level to the next if Auto Promote is set to Yes.
  - Review Leader is notified when last Level has completed the Review.
  - Review Leader would be required to promote it to the next Level if one of the following occurs:
    - Concur pending resolution of remarks
    - Non-concur with remarks
    - Waive (Deliberate non-participation, accompanied by a reason for not participating)
    - Auto concur
3. Enter the max duration of this Level in the Max Duration box. Click on down arrow and select Day(s), Week(s), Month(s) or Year(s). This is the optional max duration that this Level should take. If a max duration is specified, when a Level starts its due date is the current date plus max duration.
4. Enter the votes needed for Level in the Votes Needed for Level box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or 'All' must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
5. Enter the reason for creating the Review Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
6. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

Review Leaders can add, remove and show Groups/Subteams at each Review Level.

The Review can have one or more Subteams at the same Level. If multiple Subteams are at the same Level, Review Team members will approve/disapprove the Document at the same time (parallel).

If you are not adding Subteams to this Level, click the Next button to continue.

If you select a Shared Group for your Subteam, if the owner of the Group makes changes to the Group, these changes will be reflected in your Review if you do not perform the Create Review step before changes were made to the Shared Group.

Once you Create a Review a snapshot of the Group(s) being used in the Review process is made -- therefore any changes the owner makes to the Group will not be reflected in the Review process.

My Groups - Group(s) created by you (both private and shared). Private Groups are for your use only. 'MG' in front of the Group name indicates 'My Group'.

Shared Groups - Group(s) available for anyone to use. 'SG' in front of the Group name indicates 'Shared Group'.

1. Enter the votes needed from the Group in the Votes Needed from Group box. This is the number of votes needed to consider that the Subteam has voted. This is a required field if you add Subteam(s) to this Level. The maximum length of this field is 32 characters. An integer value greater than zero or 'All' must be entered for votes needed from Group. All means every member on Group must vote. Each Group selected counts as one entity (vote) to the overall max votes required for this Level. If the votes needed are greater than the actual number of Users on a Group, then the votes needed will default to the number of Users on that Group when the votes needed check is performed after a vote is cast.
2. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be added as a Subteam by clicking on the Group name. This will highlight the Group name.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Subteams box. To remove a Subteam from the Selected Subteams box, highlight the Subteam and click the <Remove button. The <Remove All button removes all the Subteams from the Selected Subteams box. To display the Users on the Group/Subteam, select the Group/Subteam, and click the Show Group button.

Selected Subteams	Definition of Codes
<b>MG-Subteam Name (integer value greater than zero or 'All')</b>	MG (My Groups), (integer value greater than zero or 'All')
<b>SG-Subteam Name (integer value greater than zero or 'All')</b>	SG (Shared Groups), (integer value greater than zero or 'All')

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 3:

Review Leader can add individual Users to approve/disapprove the Document at this Level. One or more Users can be added.

Note: If you are not adding individual Users to this Level, click the Next button to continue.

Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be added to the Review Level by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 4:

Review Leader can add one or more Remote Users to each Level.

If you do not need to add Remote Users to this Review Level, and there is only one Level of this Review, click the OK button to create the Review Level.

The Remote User fields displayed are:

- A drop down list of valid Remote Authenticators for the Document Manager.
- A text field to type in the Remote User's username.
- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a Remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Review Level.

Note:

- The newly created Review Level is added to the Review as the last Level.
- A history record is generated for the creation of the new Level.
- Email is sent to notify the Review leader if he/she is not the current User.

### 4.26.3. Modifying a Review

Modify Review modifies a Review in the Document Manager. Modify Review modifies the Review attributes. For example, Due Date, Revision, Allow Reserve and Replace, Allow Open Posting, and Voter Instructions. To add or remove reviewers the Review Leader will need to modify the Level of the Review.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- A Review cannot be modified when it is Active. It must first be paused.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Side Menu > Modify*]

#### **Step 1:**

1. If applicable, modify the Review Leader in the Review Leader box by clicking on the down arrow and selecting a name from the list. Only an Admin can assign the Leader of a Review.
2. If applicable, modify the due date of the Review in the Due Date box. This is the date that this Review is due. Enter date as mm/dd/yyyy.
3. If applicable, modify the revision of the Document in the Revision box. This is a required field. The maximum length of this field is 32 characters. The name entered is the name of the revision for the Generation being reviewed. When the Review is complete, this revision will be stamped on the Document/Generation. The revision cannot be the same as any other released Generation of the Document.
4. If applicable, modify the Allow Reserve and Replace box by clicking on the down arrow and select who will be allowed to reserve and replace this Document during the Review process. When a Document is reserved and replaced during a Review, a minor Generation of the Document will be created. For example, when a Document is replaced the Generation will be 1.1. No - this Document is not allowed to be reserved and replaced during the Review process; Review Leader - only the Review Leader is allowed to reserve and replace this Document during the Review process; or Review Leader and

Document Owner - only the Review Leader or the Document owner are allowed to reserve and replace this Document during the Review process.

5. If applicable, modify the setting Check to subscribe the Review Leader to all discussions for this Review.
6. If applicable, modify the Allow Open Posting by clicking on the down arrow and select Yes (Anyone can post discussion to this Document during the Review. Must have Read access to the Document) or No (Only Review members and Admin can post discussions to this Document during the Review).
7. If applicable, enter a new message or modify existing message in the Voter Instructions box. This text is sent out in email notification to Voters.
8. Enter the reason for modifying the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
9. Click the Cancel button to cancel the command, or click the OK button to modify the Review.

Note:

- The existing Review record will be modified.
- If the "Subscribe the Review Leader to all discussions for this Review." checkbox changed, then subscribe or unsubscribe the Review Leader to all discussion on the Review.
- A history record will be generated for modification of the Review.
- Email will be sent to the Review Leader if the Review Leader is not the current User.
- If Document is a Metric and the MetricRevisionFormat System Property has a value, a "Use: MMM-dd-yyyy" message will be displayed just to the right of the revision.

#### 4.26.4. Modifying a Review Level

Modify Review Level modifies the attributes and members of an existing Level on a Review.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- The Review cannot be Completed or Cancelled.
- The Review cannot be active; it must be Created, Not Started or Paused.
- The Level specified cannot be a Level that has already been completed.
- A Level must have at least one voting entity assigned to it.
- Users and/or Subteams can be on more than one Level.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Select Desired Review Level > Side Menu > Modify Level*]

**Step 1:**

1. If applicable, modify the auto concur setting in the Auto Concur box by clicking the down arrow and select Yes (allow auto concur for this Level) or No (do not allow auto concur for this Level). Auto concur indicates if votes on this Level are to be marked 'Auto Concur' when the max duration is reached. For example, If Max Duration is set to 1 week and 'Auto Concur' is set to 'Yes'; if required Votes Needed for this Level is not met when the due date (which is calculated using the max duration) is reached, the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period. If Auto Concur is Yes and Max Duration is blank then the Auto Concur has no effect.
2. If applicable, modify auto promote in the Auto Promote box by clicking the down arrow and select Yes (allow auto promote for this Level) or No (do not allow auto promote for this Level). Auto Promote indicates if the Review will automatically advance to the next Level when the required votes for this Level are received.
  - Review Leader is notified throughout the Review when the Review goes from one Level to the next if Auto Promote is set to Yes.
  - Review Leader is notified when last Level has completed the Review.
  - Review Leader would be required to promote it to the next Level if one of the following occurs:
    - Concur pending resolution of remarks
    - Non-concur with remarks
    - Waive (Deliberate non-participation, accompanied by a reason for not participating
    - Auto concur
3. If applicable, modify the due date of the Review Level in the Due Date box. This is the date that this Review Level is due. Enter the date as mm/dd/yyyy. If a max duration is specified, when a Level starts its due date is the current date plus max duration.
4. If applicable, modify votes needed for Level in the Votes Needed for Level box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or 'All' must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
5. Enter the reason for modifying the Review Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
6. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

Review Leaders can add, remove and show Groups/Subteams at each Review Level.

The Review can have one or more Subteams at the same Level. If multiple Subteams are at the same Level, Review team members will approve/disapprove the Document at the same time (parallel).



If you do not need to modify Subteams to this Level, click the Next button to continue.

If you select a Shared Group for your Subteam, if the owner of the Group makes changes to the Group, these changes will be reflected in your Review if you do not perform the Create Review step before changes were made to the Shared Group.

Once you Create a Review a snapshot of the Group(s) being used in the Review process is made -- therefore any changes the owner makes to the Group will not be reflected in the Review process.

My Groups Group(s) created by you (both private and shared). Private Groups are for your use only. 'MG' in front of the Group name indicates 'My Group'.

Shared Groups - Group(s) available for anyone to use. 'SG' in front of the Group name indicates 'Shared Group'.

1. Enter the votes needed from the Group in the Votes Needed from Group box. This is the number of votes needed to consider that the Subteam has voted. This is a required field if you add Subteam(s) to this Level. The maximum length of this field is 32 characters. An integer value greater than zero or 'All' must be entered for votes needed from Group. All means every member on Group must vote. Each Group selected counts as one entity (vote) to the overall max votes required for this Level. If the votes needed are greater than the actual number of Users on a Group, then the votes needed will default to the number of Users on that Group when the votes needed check is performed after a vote is cast.
2. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be added as a Subteam by clicking on the Group name. This will highlight the Group name.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Subteams box. To remove a Subteam from the Selected Subteams box, highlight the Subteam and click the <Remove button. The <Remove All button removes all the Subteams from the Selected Subteams box. To display the Users on the Group/Subteam, select the Group/Subteam, and click the Show Group button.

Selected Subteams	Definition of Codes
<b>MG-Subteam Name (integer value greater than zero or 'All')</b>	MG (My Groups), (integer value greater than zero or 'All')
<b>SG-Subteam Name (integer value greater than zero or 'All')</b>	SG (Shared Groups), (integer value greater than zero or 'All')

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Step 3:**

The Review Leader can add individual Users to approve/disapprove Document at this Level. One or more Users can be added.

If you do not need to modify individual Users to this Level, click the Next button to continue.

Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be added to the Review Level by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

**Step 4:**

The Review Leader can add one or more Remote Users to each Level.

If you do not need to modify Remote Users to this Review Level, and there is only one Level of this Review, click the OK button to modify the Review Level.

The Remote User fields displayed are:

- A drop down list of valid remote Authenticators for the Document Manager.
- A text field to type in the Remote User's username.
- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a Remote authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to modify the Review Level.

Note:

- The existing Review Level will be modified.
- Any Voters or Groups added to the Review Level will be created.
- Any Voters or Subteams removed from the Review Level will be deleted.
- Any Remote Voters updated on the Review Level will be modified.
- A history record will be generated for the modification of the Level.
- If the current User is not the Review leader, email will be sent to the Review leader informing them that the Review Level has been modified.
- If the Level being modified is the current Level, email will be sent to any Voters that will be removed from the Level that their vote is no longer needed.
- If the Level being modified is the current Level, email will be sent to any Voters that are added to the Level that their vote is requested.

#### 4.26.5. Deleting a Review

Delete Review deletes a Review in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Delete]*

##### **Step 1:**

The Review to be deleted and the Review attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

##### **Step 2:**

The Review to be deleted and the Review attributes are displayed.

1. Enter the reason for deleting the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Review.

Notes:

- The Review will be deleted.
- All Review Levels, Subteams and Voters for the Review will be deleted.
- All Discussions and their attachments for the Review will be deleted.
- All Discussion subscriptions for the Review will be deleted.
- The Review's Document is set to not in Review.
- A history record will be generated for the deletion of the Review.
- Email notification will be sent to all the previous Review Levels if the Review is active.
- Email notification will be sent to the Users on the Document notification list and the Review Leader if the Review Leader is not the current User.
- Email will be sent to all Voters on the current Level that have not voted yet that they can no longer vote on this Review.

#### 4.26.6. Deleting a Review Level

Delete Review Level deletes a specific Level of a Review in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- The specified Review Level's Review state must be Created, not Started or Paused.
- The Review Level's number must be greater than the current Level of the Review.
- The number of Review Levels on the Review must be greater than one.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Select Desired Review Level > Side Menu > Delete Level*]

##### **Step 1:**

The Review Level to be deleted and the Review Level attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

##### **Step 2:**

The Review Level to be deleted and the Review Level attributes are displayed.

1. Enter the reason for deleting the Review Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Review Level.

Notes:

- The Review Level will be deleted.
- All Subteams and Voters for the Review Level will be deleted.
- All Review Levels and their voting entities needing renumbering on the Review will be renumbered.
- A history record will be generated for the deletion of the Review Level.
- Email notification will be sent to the Review Leader if the Review Leader is not the current User.

#### 4.26.7. Showing a Full Review

Show Full Review displays the Review and its Level details for a specific Review.

##### *A Specific Review*

**Navigation:** [[DocMgr](#) > [Reviews](#) > [Select Desired Review](#) > [Side Menu](#) > [Full Review](#)]

Field Name	Description
<b>Doc Number</b>	The Document number of the Document for this Review. Click the Document number to display the Document explorer screen.
<b>Doc Title</b>	The title of the Document for this Review.
<b>Review Name</b>	The name for this Review is displayed as the Document number followed by the revision and then the Review ID in parenthesis.
<b>Leader</b>	The Review Leader for this Review. Click the username to display the User Info screen.
<b>Generation</b>	The Generation of the Document currently in Review.
<b>Initial Generation</b>	The initial Generation is the original Generation that was put under Review when a Review is created. If you create a Review and the latest Generation on the Document is 3.0, the initial gen and current gen will be 3.0. If you reserve and replace the Document while it is in Review, the initial gen will still be 3.0 but the current gen will be updated to 3.1. That way you can look at the Review and easily see what gen you started with and what gen you ended with. If the Review started and ended on the same gen, this field will not be displayed.
<b>Revision</b>	The revision number assigned to this Review. When the Review is complete, this revision will be stamped on the Document/Generation.

<b>Allow Reserve/Replace</b>	Indicates who will be allowed to reserve/replace the Document during the Review process. No indicates the Document is not allowed to be reserved/replaced during the Review process.
<b>Allow Open Posting</b>	Yes (Anyone can post Discussions to this Review. Must have Read access to the Document) or No (Only Review members and Admin can post Discussions to this Document during the Review).
<b>Max Duration</b>	The duration that this Review should take.
<b>Current State</b>	The current state of this Review; for example, Cancelled, Created, Not Started, Completed, Past Due, Paused, Requiring Leader Attention and Voting In Progress. The date and time of this state is also displayed.
<b>Current Level</b>	The current Level this Review is working on or blank if the Review is not in progress.
<b>Start Date</b>	The date and time this Review started or blank if it has not started.
<b>Due Date</b>	The date and time this Review is due or blank if no due date was set.
<b>End Date</b>	The date and time this Review ended or blank if it has not ended.
<b>Review Team</b>	The Review Team that was used as a template to create this Review. Click the Review Team to display the Review Team Info screen.
<b>Voter Instructions</b>	Voter instructions included in email to Team members or blank if no Voter instructions were added.

## Levels

All details along with the voters for each Level of the Review are displayed.

<b>Field Name</b>	<b>Description</b>
<b>Review</b>	The name for this Review is displayed as the Document number followed by the revision and then the Review ID in parenthesis. Click on the name to Show the Review Collapsed.
<b>Level</b>	The Level of this Review.

<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the due date for the Level is reached.</p> <p>If a max duration and/or a due date is specified for a Level and Auto Concur is set to Yes. If the votes needed for this Level is not met when the due date is reached, the votes for reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review/vote within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p> <p>A Review will not automatically be promoted to the next Level if any vote other than an Approve or Concur with Remarks has been cast on the current Level.</p>
<b>Level Max Duration</b>	The max duration for this Level.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Level Start Date</b>	The date that the Level was started.
<b>Level End Date</b>	The date that the Level was completed.
<b>Level Due Date</b>	The date that the Level is due to be completed. This date is set when a Level is started and is calculated by adding the max duration to the current date when the Level is started.

### Voters

Each Voter's name and whether or not they are local or remote, is displayed along with their organization and vote cast. If a Voter is a member of a Subteam, the Subteam is also displayed.

Field Name	Description
<b>Local/Remote User</b>	The Voter's name. If the Voter is local, then Local User is displayed for the label and if the Voter is remote, Remote User is displayed in the label. If the Voter is local, click on the name to display the user details of the Voter.
<b>Organization</b>	The Organization of the Voter. Note: For Remote Users, this field is optional.
<b>Email Address</b>	The Email Address of the Voter. Click the email address to send email to the Voter.
<b>Vote</b>	If the Voter has not voted yet, No Vote Cast is displayed; otherwise this row is not displayed at all.
<b>Remarks</b>	The vote cast along with any remarks made is displayed. This field will not be displayed if a vote has not been cast.
<b>Subteam</b>	If the Voter is a member of a Subteam, the Subteam name is displayed. Click on the name to Show Info for the Subteam. If there is no Subteam, this row will not be displayed.

## Discussions

If Discussions have occurred during the Review, the Posted By, Subject and Body Text of each Discussion will be displayed. If no Discussions occurred during this Review, these fields will not be displayed.

Field Name	Description
<b>Posted By</b>	Name of the person that posted the Discussion and the date and time Discussion was posted.
<b>Subject</b>	Subject of the Discussion.
<b>Body Text</b>	The text of the Discussion.

### 4.26.8. Showing a Review

Show Review displays the Review details for a specific Review.

#### *A Specific Review*



**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Show Info]

Field Name	Description
<b>Review Name</b>	The name for this Review is displayed as the Document number followed by the revision and then the Review id in parenthesis.
<b>Doc Number</b>	The Document number assigned to this Review. Click the Document number to display the Document Explorer screen.
<b>Leader</b>	The Review Leader for this Review. Click the username to display the User Info screen.
<b>Generation</b>	The Generation of the Document currently in Review.
<b>Initial Generation</b>	The initial Generation is the original Generation that was put under Review when a Review is created. If you create a Review and the latest Generation on the Document is 3.0, the initial Generation and current Generation will be 3.0. If you reserve and replace the Document while it is in Review, the initial Generation will still be 3.0 but the current Generation will be updated to 3.1. That way you can look at the Review and easily see what Generation you started with and what Generation you ended with. If the Review started and ended on the same Generation, this field will not be displayed.
<b>Revision</b>	The revision number assigned to this Review. When the Review is complete, this revision will be stamped on the Document/Generation.
<b>Allow Reserve/Replace</b>	Indicates who will be allowed to reserve/replace the Document during the Review process. No indicates the Document is not allowed to be reserved/replaced during the Review process.
<b>Allow Open Posting</b>	Yes (Anyone can post Discussions to this Review. Must have Read access to the Document) or No (Only Review members and Admin can post Discussions to this Document during the Review).
<b>Max Duration</b>	The duration that this Review should take.
<b>Current State</b>	The current state of this Review; for example, Cancelled, Created, Not Started, Completed, Past Due, Paused, Requiring Leader Attention and Voting In Progress. The date and time of this state is also displayed.
<b>Current Level</b>	The current Level this Review is working on or blank if the Review is not in progress.



<b>Start Date</b>	The date and time, this Review started or blank if it has not started.
<b>Due Date</b>	The date and time, this Review is due or blank if no due date was set.
<b>End Date</b>	The date and time, this Review ended or blank if it has not ended.
<b>Review Team</b>	The Review Team that was used as a template to create this Review. Click the Review Team to display the Review Team Info screen.
<b>Voter Instructions</b>	Voter instructions included in email to Team members or blank if no Voter instructions were added.

## Levels

Active in the heading indicates the current active Level of the Review.

<b>Field Name</b>	<b>Description</b>
<b>Level Number</b>	The Level of this Review.
<b>Max Duration</b>	The duration that this Level of a Review should take. When a Level is started, its due date is calculated based on the max duration added to the current date.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the due date for the Level is reached.</p> <p>If a max duration and/or a due date is specified for a Level and Auto Concur is set to Yes. If the votes needed for this Level is not met when the due date is reached, the votes for reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review/vote within the specified period.</p>





<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p> <p>A Review will not automatically be promoted to the next Level if any vote other than an Approve or Concur with Remarks has been cast on the current Level.</p>
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- The number of Levels is shown.
- Click on  to Show Review Collapsed making a specific Level the currently selected Level.
- Click on  to Show Info for the specific Review Level.

A Specific Review Displaying Only the Active Level

**Navigation:** *[DocMgr > Reviews > Select Desired Review]*

Show Review displays the collapsed tree view of this Review. All Levels of the Review are displayed but only the current/active Level is expanded.






- The Review, Start Date, State and State Date are shown.
  - Review - The name for this Review is displayed as the Document number followed by the revision and then the Review id in parenthesis.
  - Start Date - The date this Review started or blank if this Review has not started.
  - State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
  - State Date - The date the current state was set or blank if it has not been set yet.
- Click on  to View Review Collapsed for the Review, which repaints the screen.
- Click on  to Show Info for the Review.
-  indicates Discussions have been posted to the Review. Click on the  to Show Discussions for the Review.








Level

Active in the heading indicates the current active Level of the Review. The active Level of the Review is expanded by default.

Field Name	Description
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<b>Level Number</b>	The Level of this Review.
<b>Max Duration</b>	The duration that this Level of a Review should take. When a Level is started, its due date is calculated based on the max duration added to the current date.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the due date for the Level is reached.</p> <p>If a max duration and/or a due date is specified for a Level and Auto Concur is set to Yes. If the votes needed for this Level is not met when the due date is reached, the votes for reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review/vote within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p> <p>A Review will not automatically be promoted to the next Level if any vote other than an Approve or Concur with Remarks has been cast on the current Level.</p>





- Click on  to Show Review Collapsed making a specific Level the currently selected Level.
- Click on  to Show Info for the Review Level.
- The User Name/Subteam, Organization, Vote Needed/Cast, and Vote Date are displayed for the selected Review Level.
- Click on  to Review Voter and display the Review Voter Info screen.
- Click on  to Show Review Subteam.
- Click on  to Show Info and display the Review Voter Info screen or the Subteam Info screen.

-  indicates the Voter cast a vote of Approve.
-  indicates the Voter cast a vote of Concur with Remarks.
-  indicates the Voter cast a vote of Concur Pending Resolution of Remarks.
-  indicates the Voter cast a vote of Non-concur with Remarks.
-  indicates the Voter cast a vote of Waive. A vote of waive means the Voter did not wish to participate in this Review.
-  indicates a vote of Auto Concur. If there is a due date for the Level and Auto Concur is on for that Level, when the Voter does not vote by the due date the system automatically casts a vote of Auto Concur. The Auto Concur vote is considered a negative vote.
-  indicates the Voter has not cast a vote yet.

A Specific Review Displaying All Levels

**Navigation:** [DocMgr > Reviews > Select Desired Review > Side Menu > Full Review]

Show Review displays the expanded tree view of this Review. All Levels of the Review are expanded.








- The Review, Start Date, State and State Date are shown.
  - Review - The name for this Review is displayed as the Document number followed by the revision and then the Review id in parenthesis.
  - Start Date - The date this Review started or blank if this Review has not started.
  - State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
  - State Date - The date the current state was set or blank if it has not been set yet.
- Click on  to Show Review Collapsed.
- Click on  to Show Info for the Review.
-  indicates Discussions have been posted to the Review. Click on the  to Show Discussions for the Review.






Level

Active in the heading indicates the current active Level of the Review.

Field Name	Description
Level Number	The Level of this Review.

<b>Max Duration</b>	The duration that this Level of a Review should take. When a Level is started, its due date is calculated based on the max duration added to the current date.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the due date for the Level is reached.</p> <p>If a max duration and/or a due date is specified for a Level and Auto Concur is set to Yes. If the votes needed for this Level is not met when the due date is reached, the votes for reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review/vote within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p> <p>A Review will not automatically be promoted to the next Level if any vote other than an Approve or Concur with Remarks has been cast on the current Level.</p>

- Click on  to Show Review Collapsed making a specific Level the currently selected Level.
- Click on  to Show Info for the Review Level.
- The User Name/Subteam, Organization, Vote Needed/Cast, and Vote Date are displayed for each Review Level.
- Click on  to Review Voter and display the Review Voter Info screen.
- Click on  to Review Subteam.
- Click on  to Show Info and display the Review Voter Info or the Subteam Info screen.
-  indicates the Voter cast a vote of Approve.
-  indicates the Voter cast a vote of Concur with Remarks.

-  indicates the Voter cast a vote of Concur Pending Resolution of Remarks.
-  indicates the Voter cast a vote of Non-Concur with Remarks.
-  indicates the Voter cast a vote of Waive. A vote of waive means the Voter did not wish to participate in this Review.
-  indicates a vote of Auto Concur. If there is a due date for the Level and Auto Concur is on for that Level, when the Voter does not vote by the due date the system automatically casts a vote of Auto Concur. The Auto Concur vote is considered a negative vote.
-  indicates the Voter has not cast a vote yet.

On the Review side menu, click Report to show a Report summary of this Review. The Report displays details about the Review, the Voting Record, and any Discussions for this Review.

### All Reviews




**Navigation:** [[DocMgr](#) > [Reviews](#)]

All Reviews displays all the Reviews in this Document manager. Only an Admin can show all Reviews.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

### All Reviews Awaiting Leader Attention




**Navigation:** [[DocMgr](#) > [Reviews](#) > [Side Menu](#) > [Awaiting Leader](#)]

Reviews Awaiting Leader displays all the Reviews awaiting leader attention.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews awaiting leader action, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

All Reviews that have been Cancelled




**Navigation:** [\[DocMgr > Reviews > Side Menu > Cancelled\]](#)

Reviews Cancelled displays all the Reviews that have been cancelled.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that have been cancelled, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.



### All Reviews that have been Completed




**Navigation:** [\[DocMgr > Reviews > Side Menu > Completed\]](#)

Reviews Completed displays all the Reviews that have been completed.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that have been completed, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

### All Reviews that have Voting in Progress

**Navigation:** [\[DocMgr > Reviews > Side Menu > In Progress\]](#)




Reviews In Progress displays all the Reviews that have voting in progress.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that have voting in progress, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.

- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

All Reviews that are Created, Not Started




**Navigation:** [DocMgr > Reviews > Side Menu > Not Started]

Reviews Not Started displays all the Reviews that have been created but not started.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that have been created but not started, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

All Reviews that are Past Due




**Navigation:** [DocMgr > Reviews > Side Menu > Past Due]

Reviews past due displays all the Reviews that are past due.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that are past due, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

All Reviews that are Paused




**Navigation:** [\[DocMgr > Reviews > Side Menu > Paused\]](#)

Reviews paused displays all the Reviews that are paused.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that are paused, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

All Reviews that are Ready to Promote

**Navigation:** [\[DocMgr > Reviews > Side Menu > Ready To Promote\]](#)




Reviews Ready for Promotion displays all the Reviews that are ready to promote.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.

- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that are ready to promote, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

All Reviews that are Ready to Release




**Navigation:** [DocMgr > Reviews > Side Menu > Ready To Release]

Reviews ready to release displays all the Reviews that are ready to released.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that are ready to released, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

All Reviews that I Lead




**Navigation:** [DocMgr > Reviews > Side Menu > Reviews I Lead]

Reviews I Lead displays all the Reviews that you are the Review Leader for.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any Reviews that you lead, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

Active Reviews that I am on




**Navigation:** [DocMgr > Reviews > Side Menu > Reviews I'm On]

Reviews I'm on displays all the active Reviews that you are on that have not been completed or cancelled.

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.

If there are not any active Reviews that you are on, the following message will be displayed: "There aren't any Reviews that match this criteria."

- The number of Reviews is shown.
- The Reviews are listed in descending order by the State Date.
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions for the specific Review.

## Default Listing of Reviews

**Navigation:** *[DocMgr > Reviews]*




If the current User has the Review Leader privilege, all of the Reviews that the current User leads are displayed. Please refer to [Show Active Reviews that I Lead](#) for more information. In addition, all Reviews that the current User is on are displayed. Please refer to [Show Active Reviews that I am on](#) for more information.

## All Reviews for Document

**Navigation:** *[DocMgr > Explorer > Select Desired Document > Side Menu > Show Review]*

Reviews for a Document displays all Reviews for the current Document (the Document of the displayed Review).

The Review, Start Date, State and State Date are shown.

- Review - Document Number and the Revision number assigned to this Review.
- Start Date - The date this Review started or blank if this Review has not started.
- State - The current state of this Review; for example, Awaiting, Cancelled, Completed, Created, Not Started, Paused, Voting in Progress.
- State Date - The date the current state was set or blank if it has not been set yet.
  
- The number of Reviews is shown.
  
- The Reviews are listed in descending order by the State Date.
  
- Click on  to Show Review Collapsed of a specific Review with the active Level expanded.
  
- Click on  to Show Info of the specific Review.
  
- Click on  to Show Discussions for the specific Review.

### 4.26.9. Showing a Review Level

Review Level Info displays the Review Level attributes, Voters, and Subteams for a specific Level of a Review.





#### ***A Specific Review Level***








**Navigation:** [DocMgr > Reviews > Select Desired Review > Select Desired Review Level > Side Menu > Show Level Info]

Field Name	Description
<b>Review</b>	The name for this Review is displayed as the Document number followed by the revision and then the Review id in parenthesis.
<b>Level</b>	The Level of this Review.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the due date for the Level is reached.</p> <p>If a max duration and/or a due date is specified for a Level and Auto Concur is set to Yes. If the votes needed for this Level is not met when the due date is reached, the votes for reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review/vote within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p> <p>Note: A Review will not automatically be promoted to the next Level if any vote other than an Approve or Concur with Remarks has been cast on the current Level.</p>
<b>Level Max Duration</b>	The duration that this Level of a Review should take. When a Level is started, its due date is calculated based on the max duration added to the current date.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Level Start Date</b>	The date and time, this Level started or blank if it has not started.

<b>Level End Date</b>	The date and time, this Level ended or blank if hasn't ended.
<b>Level Due Date</b>	The date and time, this Level is due or blank if no due date was set.

### Voters and Subteams

- The User Name/Subteam, Organization, Vote Needed/Cast, and Vote Date are displayed.
- Click on  to Review Voter and display the Review Voter Info screen.
- Click on  to Show Info and display the Review Voter Info screen.
- Click on  to Review Subteam.
- Click on  to Show Info and display the Review Voter Info or the Subteam Info screen.

-  indicates the Voter cast a vote of Approve.
-  indicates the Voter cast a vote of Concur with Remarks.
-  indicates the Voter cast a vote of Concur Pending Resolution of Remarks.
-  indicates the Voter cast a vote of Non-concur with Remarks.
-  indicates the Voter cast a vote of Waive. A vote of waive means the Voter did not wish to participate in this Review.
-  indicates a vote of auto-concur. If there is a due date for the Level and Auto Concur is on for that Level, when the Voter does not vote by the due date the system automatically casts a vote of Auto Concur. The Auto Concur vote is considered a negative vote.
-  indicates the Voter has not cast a vote yet.

#### 4.26.10. Showing a Review Voter

Show Review Voter shows the full details for a specific Voter. This screen will vary depending on if the Voter is a Local User or a Remote User.

##### ***A Specific Review Voter***

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Select Desired Review Level > Select Desired Voter]*

- The User must have Read access to the Review.




- Local User - A User that has a TechDoc account on this Document manager.
- Remote User - A Remote User is a User that is being remotely authenticated via one of the Authenticators defined on this Document Manager. These voters do not have TechDoc accounts on this Document manager.


Field Name	Definition
<b>Review</b>	The Review that this vote is related to is displayed as the Document number followed by the revision and then the Review id in parenthesis. Click the Review to display Review Info screen.
<b>Level</b>	The Level of the Review the vote was cast on. Click the Level to display the Review Level Info screen.
<b>Local User</b>	The User that voted on this Review. Click the User to display the User Info screen. Note: This field will only be displayed for a Local User.
<b>Remote User</b>	The Remote User that voted on this Review; for example, the Remote User will be displayed as: kerberos/jdoe where kerberos is NT domain the User is being authenticated against and jdoe is the username. This field will only be displayed for a Remote User.
<b>Organization</b>	The Organization of the Voter. Note: For Remote Users, this field is optional.
<b>Email Address</b>	The Email Address of the Voter. Click the email address to send email to the Voter.

The Review Voter Info also displays the local or Remote User, date and time vote was cast, vote cast and Level number vote was cast on, and any remarks added when the vote was cast.

Depending on the vote cast, one of the following icons will be displayed:

 Approve

 Concur with Remarks

 Concur Pending Resolution of Remarks

 Non-Concur with Remarks


 Auto-concur



Waive

Click on the vote icon to View Discussion and display the Discussion Tree for Review screen.

Click on  to View this Post.

Click  to Reply to reply to this post.

If replies have been made to this vote, the number of replies and reply text will be displayed.



Click on  to View Discussion and display the Discussion Tree for Review screen.

Notes:

- The specified Review Voter will be displayed.
- The specified Review Voter's Discussion tree will be displayed.

#### 4.26.11. Canceling a Review

Cancel Review cancels a Review in the Document Manager. This will take a Document out of Review. At the same time, it preserves the contents of the Review. The Review can be uncancelled so that it can be resumed later. Multiple steps are required during the process in order to minimize the chances of an accidental Cancel.

- The Review must be in one of the following states: Voting In Progress, Past Due, Requiring Leader Attention, Ready To Promote, Doc Ready To Release or Paused.
- The User must either be an Admin or have the Review Leader privilege and be the assigned Review Leader for the Review.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Cancel]*

##### **Step 1:**

The Review to be cancelled and the Review attributes are displayed.

1. Click the Cancel button to Cancel the command, or click the Next button to continue.

##### **Step 2:**

The Review to be cancelled and the Review attributes are displayed.

1. Enter the reason for canceling the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.

2. Click the Cancel button to Cancel the command, click the Previous button to go back to the previous screen, or click the OK button to Cancel the Review.

Notes:

- The Review's state will change to Cancelled.
- The Review's current state date will be changed to the current date and time.
- The Review's end date will be set to the current date and time.
- The Document will be taken out of Review.
- If a Review Voter or Review Leader is not on the Document's access list, they will no longer have read access to the Document.
- A History record will be generated for the cancellation of the Review.
- Email is sent to the Review Leader if he is not the current User.
- Email is sent to the Document notification list, Voters on the current Review Level that have already voted, and all members from all previous Levels to notify them of the cancellation.
- Email is sent to people on the current Review Level that have not voted yet to let them know that their vote is no longer needed.

#### 4.26.12. Demoting a Review

Demote Review demotes a Review in the Document Manager. Demote Review changes the current Level to a lower Level or resets the current Level. Demoting a Review will reset all votes on all Levels down to the new Level. If demoting to the current Level, just votes cast for the current Level will be reset. The Review does not have to be paused to be demoted.

- The User must have the Review Leader privilege.
- The User must be the owner of the Review or an Admin.
- The Review cannot be Created and Not Started, Cancelled, nor Complete.
- There must be at least one Level on the Review.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Demote]*

**Step 1:**

The Review to be demoted and the Review attributes are displayed.

1. In the Demote Review to Level box, click on the down arrow and select the Level to demote the Review to. By default, the current Level is displayed.
2. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Review to be demoted and the Review attributes are displayed.

Demoting a Review will reset all votes on all Levels down to the new Level.

1. If applicable, enter a new message or modify existing message in the Voter Instructions box. This text message will be included in the email sent to the Review Team members notifying them that the Review has been demoted.
2. Enter the reason for demoting the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
3. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to demote the Review.

Notes:

- All votes and Voter remarks will be cleared from the current Level to the Level being demoted to.
- Any deleted Users who have not yet voted will be removed from the Review.
- All Levels being demoted will have their due dates, start dates and end dates cleared.
- The Level being demoted to will have its start date set to the current date and its due date set to the current date plus the max duration, if a max duration is set.
- A history record will be generated for the demotion.
- If the current User is not the Review Leader, email will be sent to the Review Leader informing them that the Review has been demoted.
- If the Review is not paused, email will be sent out to members of the old Level informing them that their vote is no longer needed.
- If the Review is not paused, email will be sent out to members of the new current Level informing them that their vote is requested.

#### **4.26.13. Emailing Members of a Review**

Email Review Members allows anyone that has Read access to the Document the capability to send email messages to the Review members for a Document that is in Review. Email can be sent to the following members: All Members, Review Leader, The Current Level, The Current Level and Haven't Voted, The Current Level and Have Voted and each Level of the Review.

When the state of the Review is Completed, Created, or Not Started, the Send To drop down box will not display Current Level, Current Level and Haven't Voted Yet, nor The Current Level and Have Voted.

- The User must have Read access to the Review.
- You must select members to send the email to.
- You must enter data in the Message Subject line of the email. The email subject line will also include DM (to be consistent with other mail messages sent from the Document Manager; for example, DM: (Whatever subject you enter)).
- You must enter data in the Message Text of the email. The email message text will include a variation of the following sentence: You are receiving this email because you

are the Leader of Review 'Document Number, Rev Basic (1081)' on Document manager DocMgr1.example.com. Note: The wording of the sentence will vary depending on what members you select and the Document manager you are currently logged in to.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Side Menu > Email Members*]

**Step 1:**

1. Select the members to send the email to in the Send To box, by clicking on the down arrow and selecting them from the list. This is a required field. You cannot leave this field as Choose One.
2. Enter the subject of the email in the Message Subject box. This is a required field. The maximum length of this field is 128 characters.
3. Enter the text of the email message in the Message Text box. This is a required field. The length of this field is unlimited.
4. Click the Cancel button to cancel the command or click the OK button to send the email.

Notes:

- Email is sent out to the specified members of the Review.
  - All Members - All members of the Review will get the email.
  - Review Leader - Only the Review Leader will get the email, unless the Review is cancelled and the Review Leader no longer exists, in this case, the Review Leader will not be in the send to drop down list.
  - Current Level - Only members on the current Level of the Review will get the email.
  - Current Level and Haven't Voted - Only members of the current Level that have not voted yet will get the email.
  - Current Level and Have Voted - Only members of the current Level that have already voted will get the email.
  - A specific Level number - Only members on the specified Level number will get the email.

#### **4.26.14. Moving a Review Level**

Move Review Level allows the Review Leader the capability to move Levels on a specific Review. Levels are the order in which reviewers will Review a Document.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- The Review cannot be Completed or Cancelled.
- The Review cannot be active; it must be Created and Not Started or Paused.
- There must be more than one Level.
- There must be Levels that have not been completed.

Note: The active Level of the Review or Levels that have been competed will not be displayed. Levels can only be moved if they are above the current Level; for example, if the Review has three Levels and Level one is active, only Levels two and three can be moved. In addition, if the Review has three Levels and Level two is active, there would be no Levels to move.

For a Review that is created, not started, all Levels of the Review will be displayed and can be moved.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Move Levels]*

**Step 1:**

1. Levels for the Review will be displayed in the Levels box.
2. To show the Review Level info, Voters and Subteams for a specific Level, click on the Level, then click on the Show Level button.
3. To move a Level up, click on the Level to be moved up, then click on the Move Up button.
4. To move a Level down, click on the Level to be moved down, then click on the Move Down button.
5. Enter the reason for moving the Review Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
6. Click the Cancel button to cancel the command, or click the OK button to move the Review Level.

**Step 2:**

Note:

This page will only be displayed if Active Scripting is disabled.

The Review Level attributes and Voters/Subteams are displayed.

1. Click the Previous button to return to the previous screen.

Notes:

- The Levels will be renumbered according to how they were moved.
- If the current User is not the Review Leader, email will be sent to the Review Leader informing them that the Review Subteam has been modified.
- A history record will be generated for the move of Review Levels.

#### 4.26.15. Pausing a Review

Pause Review pauses a Review in the Document Manager. Pausing a Review disables voting temporarily and allows the Review to be modified. Some of the fields the Review Leader may need to modify are: Max Duration, Revision, Allow Reserve and Replace, Allow Open Posting, Voter Instructions, add or remove Team Members, etc. Once the Review has been paused and modifications have been made, you can resume the Review.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- The Review must be in one of the following states: Voting In Progress, Past Due, Requiring Leader Attention, Ready To Promote, or Ready To Release.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Side Menu > Pause*]

##### **Step 1:**

The Review to be paused and the Review attributes are displayed.

1. Enter the reason for pausing the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the OK button to pause the Review.

Notes:

- The Review's state is changed to Paused.
- Voting is no longer allowed until the Review is resumed.
- A history record will be generated for pausing the Review.
- Email is sent to everyone on the current level to inform them that the Review has been paused.
- Email is sent to notify the Review Leader if they are not the current User.

#### 4.26.16. Promoting a Review

Promote Review promotes a Review to a higher Review Level. The Review does not have to be paused to promote to a higher Review Level.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Side Menu > Promote*]

##### **Step 1:**

The Review to be promoted and the Review attributes are displayed.

1. If applicable, enter a new message or modify existing message in the Voter Instructions box. This text message will be included in the email sent to the Review Team members notifying them that the Review has been promoted.
2. In the Promote Review To Level box, click on the down arrow and select the Level to promote the Review to. By default, the next Review Level is displayed.
3. Enter the reason for promoting the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the OK button to promote the Review.

Notes:

- The Review's current Level will be set to the selected Level.
- A history record will be generated for promoting the Review.
- Email is sent to notify the current Review Leader if they are not the current User.
- Email is sent to all Voters on the new current Level. If the Review is currently paused, this email is not sent until the Review is resumed.
- Email is sent to all Voters on the old Level to inform them that their vote is no longer required.

#### 4.26.17. Resuming a Review

Resume Review resumes a Review in the Document Manager. The Review must be paused before it can be resumed.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- The Review state must be Paused.

**Navigation:** [[DocMgr](#) > [Reviews](#) > [Select Desired Review](#) > [Side Menu](#) > [Resume](#)]

##### **Step 1:**

The Review attributes are displayed.

1. If applicable, enter a new message or modify existing message in the Voter Instructions box. This text message will be included in the email sent to all Voters on the current Review Level to inform them that voting is now resumed.
2. If applicable, check the box to reset any votes already cast for the current Level. If the box is checked, all votes cast and vote remarks are deleted for the current Review Level. By default, this box is unchecked.



3. Enter the reason for resuming the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the OK button to resume the Review.

Notes:

- If the User chooses to reset the votes for the current Level, all votes cast and vote remarks are deleted for the current Review Level.
- The Review's state will be re-calculated based on the current votes on the current Level.
- A history record will be generated for resuming the Review.
- A history record will be generated if the current state changes because of changes made to the Review while it was paused.
- Email will be sent to all Voters on the current Review Level to inform them that voting is now resumed.
- If the current User is not the Review Leader, the Review Leader will receive email informing them that the Review has been resumed.

#### 4.26.18. Review Report

Review Report is used to display a summary of the info about a specific Review in a simple HTML table. The Report contains most of the basics of the Review such as Doc Number, Doc Title, Start Date, etc..., as well as all of the Voters on the Review and the Vote(s) they have cast.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Report]*

#### 4.26.19. Starting a Review

Start Review starts a new Review in the Document Manager. The Review Leader must create a Review before a Review can be started. After a Review is created, voting does not start until the Review is started. When a Review is started, it can be started on any Level. Once a Review is started, an email will be sent to the current Review Level members stating that it is now time to vote on this Review.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- The specified Review's Document must not be reserved.
- The specified Review must not be Cancelled, Completed, or already started.
- The specified Review must have at least one Review Level.
- Review Leader must 'Create Review' before doing a 'Start Review'.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Start]*

**Step 1:**

1. If applicable, enter a new message or modify existing message in the Voter Instructions box. This text message will be included in the email sent to the current Review Level members notifying them that it is time for them to vote.
2. In the Start Review At Level box, click on the down arrow and select the Review Team Level that you want to start this Review for. By default, a Review starts at Level one.
3. Enter the reason for starting the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the OK button to start the Review.

Note:

- The specified Review's state will be set to Voting In Progress.
- The specified Review's current state date will be set to the current date.
- The specified Review's start date will be set to the current date.
- The specified Review's due date will be set to the current date plus the Review's max duration.
- The specified Review's end date will be set to null.
- The specified Review's current Level will be set to the specified Review Level.
- The specified Review's current Level start date will be set to the current date.
- The specified Review's current Level due date will be set to the current date plus the Review's current Level max duration.
- A history record will be created and inserted into the database to log the Review state change.
- A vote Discussion topic will be created and inserted into the database for the current Review Level since voting is in progress.
- An email will be sent to the Review Leader if the Review Leader is not the current User stating that the Review has started.
- An email will be sent to the current Review Level members stating that it is now time to vote on this Review.
- A current Review state update will be done on the Review to determine its true state and then if necessary will set the Review to a new state.

#### **4.26.20. Voting**

After the Review has been started, voting starts. After the Review Team member has reviewed the Document, it is now time to cast their vote. The following voting options are available: Approve, Concur with Remarks, Concur Pending Resolution of Remarks, Non-concur with Remarks, and Waive. The vote of Waive indicates the reviewer does not wish to participate in the Review.

A reviewer may change their vote at any time while the Level is active.

Reviewers can also vote by clicking on the vote link from an email message or from the Status and Retrieval screen from the Search Manager.

- The User must be logged in or they must have a valid username and password.
- The Review must be ready to be voted on.
- The User must be a Voter on the current Level of the Review.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Side Menu > Vote*]

**Step 1:**

The vote for Review attributes are displayed:

In the Review Name field, click on the Review name to display the Review Info screen. The Review name that this vote is related to is displayed as the Document number followed by the revision and then the Review ID in parenthesis.

In the Generation field, click on the Generation number assigned to this Review to display the Generation Info screen.

1. The Username field is automatically filled in. Note: If you are voting from the Vote link on the Status and Retrieval screen from the Search Manager, you will be required to enter your User name.
2. Enter password in the Password box. This is a required field. Note: This field will not be displayed if you are currently logged into the Document Manager.
3. Enter your vote in the Vote box by clicking on the down arrow and selecting it from the list. This is a required field. You cannot leave this field as Choose One. The following vote requires you to enter remarks in the Remarks field: Concur with Remarks, Concur Pending Resolution of Remarks, Non-concur with Remarks, and Waive.
4. If required, enter remarks in the Remarks box. This is a required field if you selected the vote of Concur with Remarks, Concur Pending Resolution of Remarks, Non-concur with Remarks, or Waive. The maximum length of this field is 128 characters.
5. Optionally include an attachment with this vote by clicking the browse button and navigating to a file.
6. Click the Cancel button to cancel the command or click the OK button to cast your vote.

Notes:

- The vote will be recorded in the Review.
- A vote discussion will be created for the specified vote.
- The current state of the Review will be updated.
- A history record will be generated for the vote cast on the Review.
- Email will be sent to notify the Review Leader that someone has voted if it is a disapproving vote.

### 4.26.21. Uncanceling a Review

Uncancel Review uncancel a Review in the Document Manager. The Review can be uncancelled so that it can be resumed later. When the Review is uncancelled it will be in a paused state and will be at the same level it was when it was cancelled. All previous votes will be retained. The Review Leader will need to resume the Review to continue the Review process.

If the Review Leader has been deleted from the system, you must select a new Review Leader before you can uncancel the Review. Only an Admin can assign the Leader of a Review.

- The specified Review must be cancelled.
- The User must have Review Leader privilege.
- The User must be the Review Leader or an Admin.
- There must not be another active Review on the Document the specified Review is on.
- The specified Review must be on a revision that is not in use.
- If the Review Leader does not exist, a new Review Leader must be specified.
- The Document's latest Generation must not be released.
- The Document under the specified Review must not be reserved.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Side Menu > Uncancel]*

#### **Step 1:**

The Review to be uncancelled and the Review attributes are displayed.

1. Enter the reason for uncanceling the Review in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, or click the OK button to uncancel the Review.

#### Notes:

- The Document's in Review flag will be turned on.
- The Review's in Review flag will be turned on.
- The Review's current state will be set to Paused.
- The Review's Generation will be set to the latest Generation of the Document.
- The Review's due date will be set to the original due date plus the time elapsed from which the Review was cancelled to the time the Review was uncancelled unless the cancelled Review was already past due. If the Review was already past due when cancelled, the specified Review's due date will be the original due date.
- The Review's current level due date will be set to the original due date plus the time elapsed from which the Review was cancelled to the time the Review was uncancelled

unless the cancelled Review was already past due. If the Review was already past due when cancelled, the specified Review's level due date will be the original level due date.

- A history record will be generated for the uncancelling of the specified Review.
- An email will be sent to the Document notification list and Review Leader, if the Review Leader is not the current User, stating that the specified Review was uncanceled.

## 4.27. Review Teams

Review Teams are groups of Users that can be assigned on a Review. Once created, Review Teams are essentially used as templates to quickly create a new Review of a Document. When a new Review is created for a Document, a "snapshot" is taken of the Review Team and copied to the Review. Any changes made to a Review Team are not reflected on any Reviews that were created using the team.

### 4.27.1. Creating a Review Team

Create Review Team creates a new Review Team in the Document Manager. The Review Leader creates a Review Team to approve or disapprove the Document. The Review Team consists of Levels. The Review Leader decides at what point each reviewer will Review the Document. This step in the Review Team is called a Level. In a large Review, there can be several Subteams and/or Users at the same Level. Remote Users can be added as reviewers. The Review Team can be setup where several Subteams and/or Users at one Level can approve a Document at the same time (parallel) or Subteams and/or Users can Review a Document one after another (serial). Each reviewer on the Review Team must have a TechDoc User account or be remotely authenticated via one of the Authenticators defined on this Document Manager.

The reviewers on the Review Team are notified by email when a Document is placed in Review with instructions to Review it.

The Review Team must be created before a Document can be placed into Review.

- The User must have the Review Leader privilege.
- The name of the Review Team cannot be the same as any other Review Team in the system.
- The new Team must have at least one Level with at least one User or Group assigned to it.

**Navigation:** [\[DocMgr > Reviews > Side Menu > Create Team\]](#)

#### **Step 1:**

1. Enter the Review Team name in the Name box. Review Team names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.

2. Enter the description of the Review Team in the Description box. The maximum length of this field is 128 characters.
3. Enter the Review Team owner in the Owner box by clicking on the down arrow and selecting a name from the list. Only an Admin can assign the owner of a Review Team.
4. Enter the max duration of the Review Team in the Max Duration box. Click on down arrow and select Day(s), Week(s), Month(s) or Year(s); this is the optional max duration that a Review using this Team should take. When an actual Review is started using this Team, the Review Leader is permitted to override this setting.
5. Enter the Review Team type in the Team Type box by clicking on the down arrow and selecting it from the list.

Team Type	Definition
Private	Review Team can only be seen by the owner or an Admin.
Shared	Review Team can be seen by everyone.

6. Enter the Review Team Levels in the Levels box. There must be at least one Level for a Review Team. This is a required field. The maximum length of this field is 32 characters. A Level is the order in which the reviewers will approve or disapprove the Document. Each Level can contain one or more Subteams and/or Users. The Review Team can be setup where several Subteams and/or Users at one Level can approve a Document at the same time (parallel) or Subteams and/or Users can approve a Document one after another (serial).
7. Enter the reason for creating the Review Team in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
8. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

Reviews can have one or more Levels. For each Level, the following fields are available: Auto Concur, Auto Promote, Max Duration and the Votes Needed for Level.

The Level box indicates the Level of this Team.

1. In the Auto Concur box click the down arrow and select Yes (allow auto concur for this Level) or No (do not allow auto concur for this Level). You cannot leave this field as Choose One. Auto concur indicates if votes on this Level are to be marked Auto Concur when the max duration is reached. For example, if Max Duration is set to 1 week and Auto Concur is set to Yes; if required Votes Needed for this Level is not met when the Max Duration date is reached, the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their

Review within the specified period. If Auto Concur is Yes and Max Duration is blank then the Auto Concur has no effect.

2. In the Auto Promote box click the down arrow and select Yes (allow auto promote for this Level) or No (do not allow auto promote for this Level). You cannot leave this field as Choose One. Auto Promote indicates if the Review will automatically advance to the next Level when the required votes for this Level are received.
  - Review Leader is notified throughout the Review when the Review goes from one Level to the next if Auto Promote is set to Yes.
  - Review Leader is notified when last Level has completed the Review.
  - Review Leader would be required to promote it to the next Level if one of the following occurs:
    - Concur pending resolution of remarks
    - Non-concur with remarks
    - Waive (Deliberate non-participation, accompanied by a reason for not participating)
    - Auto concur
3. Enter the max duration of this Level in the Max Duration box. Click on the down arrow and select Day(s), Week(s), Month(s) or Year(s); this is the optional max duration that this Level using this Team should take.
4. Enter votes needed for Level in the Votes Needed for Level box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or 'All' must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
5. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 3:

The Review Leaders can add, remove and show Groups/Subteams at each Review Team Level.

The Review Team can have one or more Subteams at the same Level. If multiple Subteams are at the same Level, Review Team members will approve/disapprove the Document at the same time (parallel).

If you are not adding Subteams to this Level, click the Next button to continue.

If you select a Shared Group for your Subteam, if the owner of the Group makes changes to the Group, these changes will be reflected in your Review if you do not perform the Create Review step before changes were made to the Shared Group.

Once you create a Review a snapshot of the Group(s) being used in the Review process is made -- therefore any changes the owner makes to the Group will not be reflected in the Review process.

My Groups - Group(s) created by you (both private and shared). Private Groups are for your use only. 'MG' in front of the group name indicates My Group.

Shared Groups - Group(s) available for anyone to use. 'SG' in front of the group name indicates Shared Group.

1. Enter the votes needed from the Group in the Votes Needed from Group box. This is the number of votes needed to consider that the Subteam has voted. This is a required field if you add Subteam(s) to this Level. The maximum length of this field is 32 characters. An integer value greater than zero or 'All' must be entered for votes needed from the Group. All means every member on Group must vote. Each Group selected counts as one entity (vote) to the overall max votes required for this Level. If the votes needed are greater than the actual number of Users on a Group, then the votes needed will default to the number of Users on that Group.
2. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be added as a Subteam by clicking on the Group name. This will highlight the Group name.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Subteams box. To remove a Subteam from the Selected Subteams box, highlight the Subteam and click the <Remove button. The <Remove All button removes all the Subteams from the Selected Subteams box. To display the Users on the Group/Subteam, select the Group/Subteam, and click the Show Group button.

Selected Subteams	Definition of Codes
<b>MG-Subteam Name (integer value greater than zero or 'All')</b>	MG (My Groups), (integer value greater than zero or 'All')
<b>SG-Subteam Name (integer value greater than zero or 'All')</b>	SG (Shared Groups), (integer value greater than zero or 'All')

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

Step 4:

The Review Leader can add individual Users to approve/disapprove Document at this Level. One or more Users can be added.

If you are not adding individual Users to this Level, click the Next button to continue.

Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.



1. Select the User(s) in the Available Users box (on the left) to be added to the Review Team by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 5:

The Review Leader can add one or more Remote Users to each Level.

If you do not need to add Remote Users to this Review Team Level, and there is only one Level of this Review Team, click the OK button to create the Review Team.

The remote User fields displayed are:

- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.
- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Review Team. If there is more than one Level on this Review Team click the Next button to create the next Level.

#### Note:

- A new Review Team will be created.
- A history record will be generated for creation of the Review Team.

### 4.27.2. Creating a Review Team Level

Create Level creates a new Level for an existing Review Team. The new Level will be created as the last Level. The Review Leader can use the move Level feature to move the levels in the order they desire.

- The User must have the Review Leader privilege.
- The User must be the actual owner of the Review Team or an Admin.
- A Level must have at least one voting entity assigned to it.
- Users and/or Subteams can be on more than one Level.

**Navigation:** [*DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Create Level*]

#### **Step 1:**

1. In the Level box the Level of the Review Team being created is displayed; for example, if the Review Team currently has two levels and you are creating another Level '3' would be displayed. Once the Level is created, you can use the move command to move the levels to the desired order.
2. In the Auto Concur box click the down arrow and select Yes (allow auto concur for this Level) or No (do not allow auto concur for this Level). You cannot leave this field as Choose One. Auto concur indicates if votes on this Level are to be marked Auto Concur when the max duration is reached. For example, if Max Duration is set to 1 week and Auto Concur is set to Yes; if required Votes Needed for this Level is not met when the Max Duration date is reached, the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period. If Auto Concur is Yes and Max Duration is blank then the Auto Concur has no effect.
3. In the Auto Promote box click the down arrow and select Yes (allow auto promote for this Level) or No (do not allow auto promote for this Level). You cannot leave this field as Choose One. Auto Promote indicates if the Review will automatically advance to the next Level when the required votes for this Level are received.
  - Review Leader is notified throughout the Review when the Review goes from one Level to the next if Auto Promote is set to Yes.
  - Review Leader is notified when the last Level of a Review has completed.
  - Review Leader would be required to promote it to the next Level if one of the following occurs:
    - Concur pending resolution of remarks
    - Non-concur with remarks
    - Waive (Deliberate non-participation, accompanied by a reason for not participating
    - Auto concur

4. Enter the max duration of this Level in the Max Duration box. Click on down arrow and select Day(s), Week(s), Month(s) or Year(s); this is the optional max duration that this Level should take.
5. Enter the votes needed for Level in the Votes Needed for Level box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or All must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
6. Enter the reason for creating the Review Team Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
7. Click the Cancel button to cancel the command, or click the Next button to continue.

### Step 2:

Review Leaders can add, remove and show Groups/Subteams at each Review Team Level.

The Review can have one or more Subteams at the same Level. If multiple Subteams are at the same Level, Review Team members will approve/disapprove the Document at the same time (parallel).

If you are not adding Subteams to this Level, click the Next button to continue.

If you select a Shared Group for your Subteam, if the owner of the Group makes changes to the Group, these changes will be reflected in your Review if you do not perform the Create Review step before changes were made to the Shared Group.

Once you create a Review a snapshot of the Group(s) being used in the Review process is made -- therefore any changes the owner makes to the Group will not be reflected in the Review process.

My Groups - Group(s) created by you (both private and shared). Private groups are for your use only. 'MG' in front of the group name indicates My Group.

Shared Groups - Group(s) available for anyone to use. 'SG' in front of the group name indicates Shared Group.

1. Enter the votes needed from the Group in the Votes Needed from Group box. This is the number of votes needed to consider that the Subteam has voted. This is a required field if you add Subteam(s) to this Level. The maximum length of this field is 32 characters. An integer value greater than zero or 'All' must be entered for votes needed from Group. All means every member on the Group must vote. Each Group selected counts as one entity (vote) to the overall max votes required for this Level. If the votes needed are greater than the actual number of Users on a Group, then the votes needed will default to the number of Users on that Group.

2. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be added as a Subteam by clicking on the Group name. This will highlight the Group name.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Subteams box. To remove a Subteam from the Selected Subteams box, highlight the Subteam and click the <Remove button. The <Remove All button removes all the Subteams from the Selected Subteams box. To display the Users on the Group/Subteam, select the Group/Subteam, and click the Show Group button.

Selected Subteams	Definition of Codes
<b>MG-Subteam Name (integer value greater than zero or 'All')</b>	MG (My Groups), (integer value greater than zero or 'All')
<b>SG-Subteam Name (integer value greater than zero or 'All')</b>	SG (Shared Groups), (integer value greater than zero or 'All')

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 3:

The Review Leader can add individual Users to approve/disapprove Documents at this Level. One or more Users can be added.

If you are not adding individual Users to this Level, click the Next button to continue.

Available Users are Users that have a Tech Doc account on this Document Manager and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be added to the Review Team Level by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 4:

The Review Leader can add one or more Remote Users to each Level.

If you do not need to add Remote Users to this Review Level click the OK button to create the Review Level.

The Remote User fields displayed are:

- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.
- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Review Team Level.

Note:

- The Review Team will have a new Level created.
- A history record will be generated for the creation of the Review Team Level.

### 4.27.3. Creating a Review Subteam

Create Review Subteam creates a Review Subteam on a Review Level. A Subteam is a group of voters that will be counted as one vote on a particular Level.

- The User must have the Review Leader privilege.
- The User must be the Review Leader of the Review or an Admin.
- The Review must be in one of the following states: Paused or Created, Not Started
- If the Review has already been started, the Subteam can only be created on the current Level or higher.
- A Subteam must have at least one voting entity assigned to it.

**Navigation:** *[DocMgr > Reviews > Select Desired Review > Select Desired Level > Side Menu > Create Subteam]*

**Step 1:**

1. Enter the Subteam name in the Subteam Name box. Subteam names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.
2. Enter the votes needed for Subteam in the Votes Needed box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or All must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
3. Enter the reason for creating the Subteam in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the Next button to continue.

### Step 2:

The Review Leader can add individual Users to approve/disapprove Document on this Subteam. One or more Users can be added.

If you are not adding individual Users to this Subteam, click the Next button to continue.

Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be added to the Review Subteam by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 3:

Review Leader can add one or more Remote Users to each Subteam.

If you do not need to add Remote Users to this Review Subteam, click the OK button to create the Review Subteam.

The Remote User fields displayed are:

- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.

- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to create the Review Subteam.

Note:

- A new Review Subteam with the specified voters is created on the specified Review Level.
- A history record is generated for the creation of the new Subteam.
- If the Review Subteam is created on the current Level, all Users in the Subteam that were not already on that Level are emailed to notify them that they have been added to the Review.
- Email is sent to notify the Review Leader if he/she is not the current User.

#### 4.27.4. Modifying a Review Team

Modify Review Team modifies the attributes of an existing Review Team in the Document Manager.

- The User must have the Review Leader privilege.
- The User must own the specified Review Team or be an Admin.

**Navigation:** *[DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Side Menu > Modify]*

##### **Step 1:**

1. If required, modify the Review Team name in the Name box. Review Team names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.
2. If required, modify the description of the Review Team in the Description box. The maximum length of this field is 128 characters.

3. If required, modify the owner in the Owner box by clicking on the down arrow and selecting a name from the list. Only an Admin can assign the owner of a Review Team.
4. If required, modify the max duration of the Review Team in the Max Duration box. Click on down arrow and select Day(s), Week(s), Month(s) or Year(s); this is the optional max duration that a Review using this Team should take. When an actual Review is started using this Team, the Review leader is permitted to override this setting.
5. If required, modify the Review Team type in the Team Type box by clicking on the down arrow and selecting it from the list.

Team Type	Definition
Private	Review Team can only be seen by the owner or an Admin.
Shared	Review Team can be seen by everyone.

6. Enter the reason for modifying the Review Team in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
7. Click the Cancel button to cancel the command, or click the OK button to modify the Review Team.

Note:

- The existing Review Team will be modified.
- A history record will be generated.

#### 4.27.5. Modifying a Review Team Level

Modify Review Team Level modifies an existing Review Team Level.

- The User must have the Review Leader privilege.
- The User must own the specified Review Team or be an Admin.
- A Level must have at least one voting entity assigned to it.
- Users and/or Subteams can be on more than one Level.

**Navigation:** [DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Select Desired Review Team Level > Side Menu > Modify Level]

##### Step 1:

1. In the Level box, the Level of the Review Team being modified is displayed.
2. If applicable, modify the Auto Concur by clicking the down arrow and select Yes (allow auto concur for this Level) or No (do not allow auto concur for this Level). Auto concur indicates if votes on this Level are to be marked Auto Concur when the max duration is reached. For example, if Max Duration is set to 1 week and Auto Concur is set to Yes; if



required Votes Needed for this Level is not met when the Max Duration date is reached, the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period. If Auto Concur is Yes and Max Duration is blank then the Auto Concur has no effect.

3. If applicable, modify the Auto Promote by clicking the down arrow and select Yes (allow auto promote for this Level) or No (do not allow auto promote for this Level). Auto Promote indicates if the Review will automatically advance to the next Level when the required votes for this Level are received.
  - Review Leader is notified throughout the Review when the Review goes from one Level to the next if Auto Promote is set to Yes.
  - Review Leader is notified when the last Level of a Review has completed.
  - Review Leader would be required to promote it to the next Level if one of the following occurs:
    - Concur pending resolution of comments
    - Non-concur with comments
    - Waive (Deliberate non-participation, accompanied by a reason for not participating)
    - Auto concur
4. If applicable, modify the max duration of this Level in the Max Duration box. Click on the down arrow and select Day(s), Week(s), Month(s) or Year(s); this is the optional max duration that this Level should take.
5. If applicable, modify the votes needed for Level in the Votes Needed for Level box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or All must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
6. Enter the reason for modifying the Review Team Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
7. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

Review Leaders can add, remove and show Groups/Subteams at each Review Team Level.

The Review can have one or more Subteams at the same Level. If multiple Subteams are at the same Level, Review Team members will approve/disapprove the Document at the same time (parallel).

If you do not need to modify Subteams to this Team Level, click the Next button to continue.

If you select a Shared Group for your Subteam, if the owner of the Group makes changes to the Group, these changes will be reflected in your Review if you do not perform the Create Review step before changes were made to the Shared Group.

Once you create a Review a snapshot of the Group(s) being used in the Review process is made -- therefore any changes the owner makes to the Group will not be reflected in the Review process.

**My Groups** - Group(s) created by you (both private and shared). Private Groups are for your use only. 'MG' in front of the Group name indicates 'My Group'.

**Shared Groups** - Group(s) available for anyone to use. 'SG' in front of the group name indicates Shared Group.

1. Enter the votes needed from the Group in the Votes Needed from Group box. This is the number of votes needed to consider that the Subteam has voted. This is a required field if you add Subteam(s) to this Level. The maximum length of this field is 32 characters. An integer value greater than zero or All must be entered for votes needed from the group. All means every member on group must vote. Each Group selected counts as one entity (vote) to the overall max votes required for this Level. If the votes needed are greater than the actual number of Users on a Group, then the votes needed will default to the number of Users on that Group.
2. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be added as a Subteam by clicking on the Group name. This will highlight the Group name.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Subteams box. To remove a Subteam from the Selected Subteams box, highlight the Subteam and click the <Remove button. The <Remove All button removes all the Subteams from the Selected Subteams box. To display the Users on the Group/Subteam, select the Group/Subteam, and click the Show Group button.

Selected Subteams	Definition of Codes
<b>MG-Subteam Name (integer value greater than zero or 'All')</b>	MG (My Groups), (integer value greater than zero or 'All')
<b>SG-Subteam Name (integer value greater than zero or 'All')</b>	SG (Shared Groups), (integer value greater than zero or 'All')

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

Step 3:

The Review Leader can add individual Users to approve/disapprove Document at this Level. One or more Users can be added.

If you do not need to modify individual Users to this Level, click the Next button to continue.

Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be added to the Review Level by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 4:

The Review Leader can add one or more Remote Users to each Level.

If you do not need to modify Remote Users to this Review Team Level, and there is only one Level of this Review, click the OK button to modify the Review Team Level.

The Remote User fields displayed are:

- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.
- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to modify the Review Team Level.

Note:

- The existing Review Team Level will be modified.
- Any Users or Subteams removed from the Review Team Level will be deleted.
- Any Users or Groups added to the Review Team Level will be created.
- A history record will be generated.

#### 4.27.6. Modifying a Review Subteam

Modify Review Subteam modifies an existing Subteam on a Level of a Review. A Subteam is a group of Voters that will be counted as one vote on a particular Level.

- The User must have the Review Leader privilege.
- The User must be the Review Leader of the Review or an Admin.
- The Review cannot be Completed or Cancelled.
- The Review cannot be active; it must be Created, Not Started or Paused.
- The Subteam cannot be on a Level that has already been completed.
- A Subteam must have at least one voting entity assigned to it.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Select Desired Review Subteam > Side Menu > Modify Subteam*]

##### **Step 1:**

1. If applicable, modify the Subteam name in the Subteam Name box. Subteam names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.
2. If applicable, modify the votes needed for the Subteam in the Votes Needed box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or All must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
3. Enter the reason for modifying the Subteam in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the Next button to continue.

##### **Step 2:**

Review Leader can add individual Users to approve/disapprove Document on this Subteam. One or more Users can be added.

If you do not need to modify individual Users to this Subteam, click the Next button to continue.

Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be added to the Review Subteam by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.
3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 3:

Review Leader can add one or more Remote Users to each Subteam.

If you do not need to add or remove Remote Users to this Review Subteam, click the OK button to modify the Review Subteam.

The Remote User fields displayed are:

- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.
- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to modify the Review Subteam.

### Note:

- Any Voters added to the Subteam will be created.
- Any Voters removed from the Subteam will be deleted.

- Any remote Voters updated on the Subteam will be modified.
- A history record will be generated.
- If the current User is not the Review Leader, email will be sent to the Review Leader informing them that the Review Subteam has been modified.
- If the Subteam being modified is on the current Level, email will be sent to any Voters that will be removed from the Subteam that their vote is no longer needed.
- If the Subteam being modified is on the current Level, email will be sent to any Voters that are added to the Subteam that their vote is requested.

#### 4.27.7. Deleting a Review Subteam

Delete Review Subteam Deletes a specific Subteam of a Review in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Review Leader privilege.
- The User must be the Review Leader or an Admin.
- The specified Review Subteam's Review state must be Created, not Started or Paused.
- The Subteam cannot be on a Level that has already been completed.

**Navigation:** [*DocMgr > Reviews > Select Desired Review > Select Desired Review Subteam > Side Menu > Delete Subteam*]

##### **Step 1:**

The Review Subteam to be deleted and the Review Subteam attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

##### **Step 2:**

The Review Subteam to be deleted and the Review Subteam attributes are displayed.

1. Enter the reason for deleting the Review Subteam in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Review Subteam.

##### **Notes:**

- The Subteam will be deleted.
- All Review voters and votes for the Subteam will be deleted.
- All vote related Discussions and attachments associated with the Subteam's members votes will be deleted.

- A history record will be generated for the deletion of the Review Subteam.
- Email notification will be sent to members of the Subteam informing them that their vote is no longer needed.
- Email notification will be sent to the Review Leader if the Review Leader is not the current User.

#### 4.27.8. Deleting a Review Team

Delete Review Team deletes a Review Team in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Review Leader privilege.
- The User must be the owner of the Review Team or an Admin.

**Navigation:** [*DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Side Menu > Delete*]

##### **Step 1:**

The Review Team to be deleted and the Review Team attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

##### **Step 2:**

The Review Team to be deleted and the Review Team attributes are displayed.

1. Enter the reason for deleting the Review Team in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Review Team.

##### **Notes:**

- The Review Team will be deleted.
- All Levels for the Review Team will be deleted.
- All entries assigned to the Levels for the Review Team will be deleted.
- A history record will be generated for the deletion of the Review Team.

#### 4.27.9. Deleting a Review Team Level

Delete Review Team Level deletes a specific Level of a Review Team in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have the Review Leader privilege.
- The User must be the owner of the Review Team or an Admin.
- The last remaining Level for a Review Team cannot be deleted.

**Navigation:** [*DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Select Desired Review Team Level > Side Menu > Delete Level*]

**Step 1:**

The Review Team Level to be deleted and the Review Team Level attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Review Team Level to be deleted and the Review Team Level attributes are displayed.

1. Enter the reason for deleting the Review Team Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Review Team Level.

**Notes:**

- The Review Team Level will be deleted.
- Any entries for the Level will be deleted.
- The remaining levels on the Review Team will be renumbered if the Level deleted was not the last Level.
- A history record will be generated for the deletion of the Review Team Level.

#### **4.27.10. Showing Review Teams**



Show Review Teams displays all the Review Teams, both private and shared, that have created in the Document Manager. Private Review Teams are Review Teams that can only be used by the owner or an Admin. Shared Review Teams are Review Teams that are available for anyone to use. The User must have the Admin privilege to show all Review Teams.

Review Teams are used as templates when creating a new Review. When a new Review is created for a Document, a "snapshot" is taken of the Review Team and copied to the Review. Any changes made to a Review Team are not reflected on any Reviews that were created using the Team.

**All Review Teams**



**Navigation:** [DocMgr > Reviews > Side Menu > All Teams]

- The Name and Description are displayed for each Review Team.
- The number of Review Teams is shown.
- The Review Teams are displayed in alphabetical order by the Review Team name.
- Click on  to View the specific Review Team.
- Click on  to Show Info for the specific Review Team.



### All of My Review Teams

**Navigation:** [DocMgr > Reviews > Side Menu > My Teams]

All My Review Teams displays all the Review Teams, both private and shared, that you have created in the Document Manager. Private Review Teams are Review Teams that can only be used by the owner or an Admin. Shared Review Teams are Review Teams that are available for anyone to use. The User must have the Review Leader privilege to show Review Teams.

Review Teams are used as templates when creating a new Review. When a new Review is created for a Document, a "snapshot" is taken of the Review Team and copied to the Review. Any changes made to a Review Team are not reflected on any Reviews that were created using the Team.

If you have not created a Review Team in the Document Manager the following message will be displayed: "You don't have any Review Teams."



- The Name and Description are displayed for each Review Team.
- The number of Review Teams is shown.
- The Review Teams are displayed in alphabetical order by the Review Team name.
- Click on  to View the specific Review Team.
- Click on  to Show Info for the specific Review Team.

### All of Shared Review Teams

**Navigation:** [DocMgr > Reviews > Side Menu > Shared Teams]

All Shared Review Teams displays all the Shared Review Teams, including your Shared Review Teams that have been created in the Document Manager. Shared Review Teams are available for anyone to use.

Review Teams are used as templates when creating a new Review. When a new Review is created for a Document, a "snapshot" is taken of the Review Team and copied to the Review. Any changes made to a Review Team are not reflected on any Reviews that were created using the Team.

- The Name and Description are displayed for each Review Team.
- The number of Review Teams is shown.
- The Review Teams are displayed in alphabetical order by the Review Team name.
- Click on  to View the specific Review Team.
- Click on  to Show Info for the specific Review Team.

A Specific Review Team in Full Detail

**Navigation:** [DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Side Menu > Full Team]

Review Team Info displays the full Team details for a specific Review Team.

Review Teams are used as templates when creating a new Review. When a new Review is created for a Document, a "snapshot" is taken of the Review Team and copied to the Review. Any changes made to a Review Team are not reflected on any Reviews that were created using the Team.

Review Team Info

Field Name	Description
<b>Name</b>	The name of this Review Team.
<b>Description</b>	The description of this Review Team.
<b>Owner</b>	The User that owns this Review Team. Click the owner's name link to display the User Info screen.
<b>Team Type</b>	Private - Review Team is only available to the owner or an Admin. Shared - Review Team is available for anyone to use.
<b>Max Duration</b>	The duration that a Review using this Team should take.

Level

All Levels for this specific Review Team are displayed.

Field Name	Description
<b>Review Team</b>	The name of this Review Team. Click the Review Team name link to display a brief description of the Review Team Info screen.

<b>Level Number</b>	The Level of this Review Team.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Max Duration</b>	The duration that this Level of a Review using this Team should take.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the max duration is reached.</p> <p>For example, if Max Duration is set to one (1) week and Auto Concur is set to Yes. If the votes needed for this Level is not met when the Max Duration date is reached, the vote for the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p>
<b>Subteams</b>	Subteams on this Level of the Review. Click the Subteam(s) link to display the Group Info and Group Members screen. None indicates no subteams are on this Level.
<b>Users</b>	Users on this Level of the Review. Click the User's name link to display the User Info screen. None indicates no users are on this Level.
<b>Remote Users</b>	Remote Users on this Level of the Review. None indicates no Remote Users are on this Level of the Review.




#### A Specific Review Team and its Levels



**Navigation:** [\[DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team\]](#)

Review Team Info displays the Name and Description for a specific Review Team. For each Level of the Review Team the following is displayed: Level Number, Max Duration, Votes Needed, Auto Concur, and Auto Promote. The Voters: Local/Remote/Subteam and Votes Needed are also displayed for each Level.

Review Teams are used as templates when creating a new Review. When a new Review is created for a Document, a "snapshot" is taken of the Review Team and copied to the Review. Any changes made to a Review Team are not reflected on any Reviews that were created using the Team.

Field Name	Description
<b>Name</b>	The name of this Review Team.
<b>Description</b>	The description of this Review Team.
<b>Level Number</b>	The Level of this Review Team.
<b>Max Duration</b>	The duration that this Level of a Review using this Team should take.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the max duration is reached.</p> <p>For example, if Max Duration is set to one (1) week and Auto Concur is set to Yes. If the votes needed for this Level is not met when the Max Duration date is reached, the vote for the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p>

- Click on  to View Review Team for the specific Review Team.
- Click on  to Show Info for the specific Review Team, and Review Team Level.
- Click on  to View Review Team Level for the specific Review Team Level.

-  indicates a Local Voter (Voter has a TechDoc account on this Document manager) or Remote Voter (Voter is remotely authenticated via one of the Authenticators defined on this Document Manager).
-  indicates a Subteam (Group).

A Specific Review Team and its Levels in Detail

**Navigation:** [DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Side Menu > Show Info]

Review Team Info displays all Levels and the Level details. The Name, Description, Owner, Team Type, and Max Duration for a specific Review Team are displayed. For each Level of the Review Team the following is displayed: Level Number, Max Duration, Votes Needed, Auto Concur, and Auto Promote.

Review Teams are used as templates when creating a new Review. When a new Review is created for a Document, a "snapshot" is taken of the Review Team and copied to the Review. Any changes made to a Review Team are not reflected on any Reviews that were created using the Team.

Review Team Info



Field Name	Description
<b>Name</b>	The name of this Review Team.
<b>Description</b>	The description of this Review Team.
<b>Owner</b>	The User that owns this Review Team. Click the owner's name link to display the User Info screen.
<b>Team Type</b>	Private - Review Team is only available to the owner or an Admin. Shared - Review Team is available for anyone to use.
<b>Max Duration</b>	The duration that a Review using this Team should take.

Levels

All Levels for this specific Review Team are displayed.

Field Name	Description
------------	-------------

<b>Level Number</b>	The Level of this Review Team.
<b>Max Duration</b>	The duration that this Level of a Review using this Team should take.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the max duration is reached.</p> <p>For example, if Max Duration is set to one (1) week and Auto Concur is set to Yes. If the votes needed for this Level is not met when the Max Duration date is reached, the vote for the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p>

- Click on  to View Review Team Level for the specific Review Team Level.
- Click on  to Show Info for the specific Review Team Level.

All Review Teams Using a Group


**Navigation:** [DocMgr > Groups > Select Desired Group > Side Menu > For Teams]

A listing of all the Review Teams using a specific Group is displayed.

If no Review Teams are using this Group, the following message will be displayed: "There aren't any Review Teams."

- The Name and Description are displayed for each Review Team.

- Click on  to View Review Team for the specific Review Team.

- Click on  to Show Info for the specific Review Team.

#### 4.27.11. Showing a Review Team Level

Review Team Level Info displays the full Team details for a specific Level.



##### *A Specific Review Team Level*

**Navigation:** [DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Click Info Icon Next to Desired Review Team Level]

Field Name	Description
<b>Review Team</b>	The name of this Review Team. Click the Review Team name link to display the Review Team Info screen.
<b>Level Number</b>	The Level of this Review Team.
<b>Votes Needed</b>	The number of votes needed for this Level.
<b>Max Duration</b>	The duration that this Level of a Review using this Team should take.
<b>Auto Concur</b>	<p>Yes - Votes on this Level will be marked Auto Concur when the max duration is reached.</p> <p>No - Votes on this Level will not be marked Auto Concur when the max duration is reached.</p> <p>For example, if Max Duration is set to one (1) week and Auto Concur is set to Yes. If the votes needed for this Level is not met when the Max Duration date is reached, the vote for the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period.</p>
<b>Auto Promote</b>	<p>Yes - Review will automatically advance to the next Level when the required votes for this Level are received.</p> <p>No - Review will not automatically advance to the next Level when the required votes for this Level are received.</p>

## Voters and Subteams

The User, Remote User, Subteam, and votes needed are displayed.

-  indicates a Local Voter (Voter has a TechDoc account on this Document Manager) or Remote Voter (Voter is remotely authenticated via one of the Authenticators defined on this Document Manager).
-  indicates a Subteam (Group).

### 4.27.12. Showing a Review Subteam

Review Subteam Info displays the details for a specific Review Subteam.



#### ***A Specific Review Subteam***

**Navigation:** [DocMgr > Reviews > Select Desired Review > Select Desired Review Subteam > Side Menu > Show Subteam Info]








Field Name	Description
<b>Review</b>	The name for this Review is displayed as the Document number followed by the revision and then the Review ID in parenthesis. Click the name to Show Review Collapsed.
<b>Level</b>	The Level number that this Subteam is on. Click the number to Show Review Level Info
<b>Name</b>	The name for this Subteam.
<b>Votes Needed</b>	The number of votes needed for this Subteam.

## Voters

The User Name/Subteam, Organization, Vote Needed/Cast, and Vote Date are displayed.

-  indicates a Local Voter (Voter has a TechDoc account on this Document manager) or Remote Voter (Voter is remotely authenticated via one of the Authenticators defined on this Document Manager).
- Click on  to Show Info and display the Review Voter Info.



-  indicates the Voter cast a vote of Approve.
-  indicates the Voter cast a vote of Concur with Remarks.
-  indicates the Voter cast a vote of Concur Pending Resolution of Remarks.
-  indicates the Voter cast a vote of Non-concur with Remarks.
-  indicates the Voter cast a vote of Waive. A vote of waive means the Voter did not wish to participate in this Review.
-  indicates a vote of Auto Concur. If there is a due date for the Level and Auto Concur is on for that Level, when the Voter does not vote by the due date the system automatically casts a vote of Auto Concur. The Auto Concur vote is considered a negative vote.
-  indicates the Voter has not cast a vote yet.

#### 4.27.13. Copying a Review Team

Copy Review Team copies an existing Review Team in the Document Manager.

- The User must have the Review Leader privilege.
- If the User is not an Admin, the owner of the new Review Team cannot be changed.
- The name of the new Review Team cannot be the same as any other Review Team in the system.
- There must be at least one Level for the new Review Team.
- Each Level must have at least one Voter.

**Navigation:** [*DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Side Menu > Copy*]

##### **Step 1:**

1. Enter the Review Team name in the Name box. Review Team names must be unique within the same Document Manager. This is a required field. The maximum length of this field is 32 characters.
2. If required, modify the description of the Review Team in the Description box. The maximum length of this field is 128 characters.
3. If required, modify the owner of the Review Team in the Owner box by clicking on the down arrow and selecting a name from the list. Only an Admin can modify the owner of a Review Team.
4. If required, modify the max duration of the Review Team in the Max Duration box. Click on down arrow and select Day(s), Week(s), Month(s) or Year(s); this is the optional max duration that a Review using this Team should take. When an actual Review is started using this Team, the Review Leader is permitted to override this setting.

5. If required, modify the Review Team type in the Team Type box by clicking on the down arrow and selecting it from the list.

Team Type	Definition
<b>Private</b>	Review Team can only be seen by the owner or an Admin.
<b>Shared</b>	Review Team can be seen by everyone.

6. If required, modify the Review Team levels in the Levels box. There must be at least one Level for a Review Team. This is a required field. The maximum length of this field is 32 characters. A Level is the order in which the reviewers will approve or disapprove the Document. Each Level can contain one or more Subteams and/or Users. The Review Team can be setup where several Subteams and/or Users at one Level can approve a Document at the same time (parallel) or Subteams and/or Users can approve a Document one after another (serial).
7. Enter the reason for copying the Review Team in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
8. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

The Review Leader has the capability to set Auto Concur, Auto Promote, Max Duration and the Votes Needed for Each Level of the Review Team.

The Level box indicates the Level of this Team.

1. In the Auto Concur box click the down arrow and select Yes (allow auto concur for this Level) or No (do not allow auto concur for this Level). Auto concur indicates if votes on this Level are to be marked Auto Concur when the max duration is reached. For example, if Max Duration is set to 1 week and Auto Concur is set to Yes; if required Votes Needed for this Level is not met when the Max Duration date is reached, the reviewers who did not vote would automatically be cast as Auto Concur. An automatic email will be sent to those reviewers notifying them that they have concurred because they did not respond to the initial email seeking their Review within the specified period. If Auto Concur is Yes and Max Duration is blank then the Auto Concur has no effect.
2. In the Auto Promote box click the down arrow and select Yes (allow auto promote for this Level) or No (do not allow auto promote for this Level). Auto Promote indicates if the Review will automatically advance to the next Level when the required votes for this Level are received.
  - o Review Leader is notified throughout the Review when the Review goes from one Level to the next if Auto Promote is set to Yes.
  - o Review Leader is notified when last Level has completed the Review.

- Review Leader would be required to promote it to the next Level if one of the following occurs:
  - Concur pending resolution of remarks
  - Non-concur with remarks
  - Waive (Deliberate non-participation, accompanied by a reason for not participating)
  - Auto concur
- 3. Enter the max duration of this Level in the Max Duration box. Click on down arrow and select Day(s), Week(s), Month(s) or Year(s); this is the optional max duration that this Level using this Team should take.
- 4. Enter the votes needed for Level in the Votes Needed for Level box. This is a required field. The maximum length of this field is 32 characters. An integer value greater than zero or All must be entered for votes needed. All means every member must vote. This is the number of votes needed for the Review to be promoted to the next Level. Each Level must have at least one voting entity assigned to it.
- 5. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

### Step 3:

Review Leaders can add, remove and show Groups/Subteams at each Review Team Level.

The Review Team can have one or more Subteams at the same Level. If multiple Subteams are at the same Level, Review Team members will approve/disapprove the Document at the same time (parallel).

If you are not adding Subteams to this Level, click the Next button to continue.

If you select a Shared Group for your Subteam, if the owner of the Group makes changes to the Group, these changes will be reflected in your Review if you do not perform the Create Review step before changes were made to the Shared Group.

Once you create a Review a snapshot of the Group(s) being used in the Review process is made -- therefore any changes the owner makes to the Group will not be reflected in the Review process.

My Groups - Group(s) created by you (both private and shared). Private Groups are for your use only. 'MG' in front of the Group name indicates My Group.

Shared Groups - Group(s) available for anyone to use. 'SG' in front of the Group name indicates Shared Group.

1. Enter the votes needed from Group in the Votes Needed from Group box. This is the number of votes needed to consider that the Subteam has voted. This is a required field

if you add Subteam(s) to this Level. The maximum length of this field is 32 characters. An integer value greater than zero or All must be entered for votes needed from the Group. All means every member on the Group must vote. Each Group selected counts as one entity (vote) to the overall max votes required for this Level. If the votes needed are greater than the actual number of Users on a Group, then the votes needed will default to the number of Users on that Group.

2. Select the Group(s) in the My Groups and/or Shared Groups box (on the left) to be added as a Subteam by clicking on the Group name. This will highlight the Group name.
3. Click the Add> button. The Add> button moves the highlighted Group to the Selected Subteams box. To remove a Subteam from the Selected Subteams box, highlight the Subteam and click the <Remove button. The <Remove All button removes all the Subteams from the Selected Subteams box. To display the Users on the Group/Subteam, select the Group/Subteam, and click the Show Group button.

Selected Subteams	Definition of Codes
<b>MG-Subteam Name (integer value greater than zero or 'All')</b>	MG (My Groups), (integer value greater than zero or 'All')
<b>SG-Subteam Name (integer value greater than zero or 'All')</b>	SG (Shared Groups), (integer value greater than zero or 'All')

4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 4:

Review Leader can add individual Users to approve/disapprove Document at this Level. One or more Users can be added.

If you are not adding individual Users to this Level, click the Next button to continue.

Available Users are Users that have a Tech Doc account, on this Document Manager, and whose name does not appear in the Selected Users box. Once a User's name appears in the Selected Users box, the name is removed from the Available Users box.

1. Select the User(s) in the Available Users box (on the left) to be added to the Review Team by clicking on the User's name. This will highlight the name.
2. Click the Add> button. The Add> button moves the highlighted Users to the Selected Users box. To remove a User from the Selected Users box, highlight the User and click the <Remove button. The <Remove All button removes all the Users from the Selected Users box. To show information for the User, highlight the User name, and click the Show User button.

3. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

#### Step 5:

The Review Leader can add one or more Remote Users to each Level.

If you do not need to add Remote Users to this Review Team Level, and there is only one Level of this Review Team, click the OK button to create the Review Team.

The Remote User fields displayed are:

- A drop down list of valid remote Authenticators for the Document manager.
- A text field to type in the Remote User's username.
- An organization field to type in the Remote User's optional organization.
- An email address field to type in the Remote User's email address.

To add a Remote User, in the New Remote User box, click on the down arrow and select a remote Authenticator from the list. This cannot be left as Choose One. Enter a username in the text field. In the Organization box, optionally enter an organization or choose one of the system's organizations from the drop down. In the Email Address box, enter the Remote User's email address. Click the Add button.

To remove Remote Users, click the Remove button next to the Remote User that you would like to remove.

Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to copy the Review Team. If there is more than one Level on this Review Team click the Next button to create the next Level.

#### Note:

- A new Review Team will be created.
- A history record will be generated for the creation of the new Review Team.

### **4.27.14. Moving Review Team Levels**

Move Review Team Levels allows the Review Leader the capability to move Levels on a specific Review Team. Levels are the order in which reviewers will Review a Document.

- The User must have the Review Leader privilege.
- The User must be the owner of the Review Team or an Admin.
- There must be more than one Level.

**Navigation:** *[DocMgr > Reviews > Side Menu > My Teams > Select Desired Review Team > Side Menu > Move Levels]*

**Step 1:**

Note: All Levels of the Review Team are displayed and can be moved.

1. Levels for the Review will be displayed in the Levels box.
2. To show the Review Team Level info, Voters and Subteams for a specific Level, click on the Level and then click on the Show Level button.
3. To move a Level up, click on the Level to be moved up and then click on the Move Up button.
4. To move a Level down, click on the Level to be moved down and then click on the Move Down button.
5. Enter the reason for moving the Review Team Level in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.
6. Click the Cancel button to cancel the command, or click the OK button to move the Review Team Levels.

**Step 2:**

Note:

This page will only be displayed if Active Scripting is disabled.

The Review Team Level attributes and Voters/Subteams are displayed.

1. Click the Previous button to return to the previous screen.

Notes:

- The Levels will be renumbered according to how they were moved.
- If the current User is not the Review Leader, email will be sent to the Review Leader informing them that the Review Subteam has been modified.
- A history record will be generated for the move of Review Team Levels.

## 4.28. Search Folders

A Search Folder is nothing more than a set of Documents that match a set of search criteria. When you create a Search Folder, you enter all the Document metadata that you wish to search on. When you view the results of a Search Folder, all the Documents that match are returned. This gives you a way to perform and save searches so that can be easily repeated or saved for later.

### 4.28.1. Creating a Search Folder

Create Search Folder creates a new Search Folder in the Document Manager. A Search Folder is used to view a set of Documents that all match certain criteria. For example, if you find yourself often performing a search for Documents using the same fields in Advanced Search, you could create a Search Folder with all the same criteria. Then anytime you need to look for those "Documents", you can simply view the Search Folder instead of re-entering all the search criteria on Advanced Search. Search Folders also allow you to customize the output of the search by selecting which columns to display in addition to the Doc Number column which is always shown.

- The Search Folder name cannot be the same as any other Search Folder the User has created.

**Navigation:** *[DocMgr > My Work > Side Menu > Search Folders > Side Menu > Create]*

#### **Step 1:**

1. Enter the Search Folder name in the Name box. The Search Folder name must be unique among the other Search Folders the User has created. Name is a required field. The maximum length of this field is 255 characters.
2. Enter the description of the Search Folder in the Description box. The maximum length of this field is 255 characters.
3. Enter the Search Folder owner in the Owner box by clicking on the down arrow and selecting a name from the list. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign the owner of a Search Folder.
4. Click the Cancel button to cancel the command, or click the Next button to continue.

#### **Step 2:**

Enter one or more criterion in the Document Criteria, Metric Criteria, and/or Keyword Criteria sections. The criteria entered here will be used to determine which Documents are displayed when viewing the results of a Search Folder. A Search Folder must have at least one criterion entered.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria are not case sensitive.
- The asterisk (\*) represents zero or more characters.
- The question mark (?) represents exactly one character.
- Multiple asterisks and/or question marks are allowed in the same word.
- Consecutive asterisks are not allowed but consecutive question marks are allowed.

- Search fields cannot contain only asterisks except for Keywords. A Keyword may be specified with a value of \* to signify any Document that has that Keyword regardless of the Keyword's value.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules.

### Document Criteria

The table below describes the Document Criteria:

Field	Search Criteria
<b>Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Title</b>	Enter the Document title, or part of the Document title followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.
<b>Create Date</b>	<p>Search for Documents created on a specific date. For example, Documents created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created for a range of dates. For example, Documents created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created since a specific date. For example, Documents created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents created prior to a specific date. For example, Documents created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Modify Date</b>	<p>Search for Documents last modified on a specific date. For example, Documents last modified on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents last modified for a range of dates. For example, Documents last modified from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p>



	<p>Search for Documents last modified since a specific date. For example, Documents last modified from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents last modified prior to a specific date. For example, Documents last modified prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Point of Contact</b>	Enter the Document point of contact, or part of the Document point of contact followed by an asterisk.
<b>Reserved By</b>	Click on the down arrow and select the name from the list.
<b>Doc Type</b>	Click on the down arrow and select a Document Type from the list.
<b>Doc Category</b>	Click on the down arrow and select a Document Category from the list.
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>In Review</b>	Click on the down arrow and select Yes or No from the list.
<b>Comments</b>	Click on the down arrow and select No Comments, Closed Comments or Open Comments from the list.
<b>Release Date</b>	<p>Search for Documents released on a specific date. For example, Documents released on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents released for a range of dates. For example, Documents released from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents released since a specific date. For example, Documents released from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents released prior to a specific date. For example, Documents released prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Last Revision</b>	Enter the last revision, or part of the last revision followed by an asterisk.

<b>Web Search</b>	Click on the down arrow and select web Search from the list.
<b>Read Access</b>	<p>Click on the down arrow and select Read access from the list.</p> <p>None - Documents do not have *Local Users (R), *Campus Users (R), *Community Users (R), or *Global Users (R) assigned with Read Access.</p> <p>Local - Documents do have *Local Users (R) assigned with Read Access.</p> <p>Campus - Documents do have *Campus Users (R) assigned with Read Access.</p> <p>Community - Documents do have *Community Users (R) assigned with Read Access.</p> <p>Global - Documents do have *Global Users (R) assigned with Read Access.</p>
<b>RMA Record</b>	Click the down arrow and select Yes or No.

Metric Criteria

The table below describes the Metric Criteria:

<b>Field</b>	<b>Search Criteria</b>
<b>Metric Status</b>	Click on the down arrow and select the Metric Status from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS metrics.
<b>Metric Resp. Official</b>	Click on the down arrow and select the Metric responsible official from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric POC</b>	Click on the down arrow and select the Metric point of contact from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric Organization</b>	Click on the down arrow and select the Metric Organization from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

<b>Metric Frequency</b>	Click on the down arrow and select the Metric frequency from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Reporting Lag Days</b>	Enter the reporting lag days. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

### Keyword Criteria

One more Keywords can be added as search criteria.

1. Click on the down arrow, select the Keyword from the list, and then click on the Add button. The Keyword will be added as a searchable field. Enter the Keyword, part of the Keyword followed by an asterisk, or just an asterisk. To remove the Keyword, click the Remove button.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen or click the Next button to continue.

### Step 3:

One or more Columns can be added to display when viewing the Search Folder's results. By default, the Doc Number field is always displayed.

1. Select the Columns(s) in the Columns box (on the left) to be added by clicking on the Column name. This will highlight the Column name.
2. Click the Add> button. The Add> button moves the highlighted Column to the Selected Columns box. To remove a Column from the Selected Columns box, highlight the Column and click the <Remove button. The <Remove All button removes all the Columns from the Selected Columns box.
3. If desired, the Columns order may be altered to change the order they appear when output. The first Column in the Selected Columns box will be the first Column on the left. The next Column down in the Selected Columns box will be the next Column from the left and so on. To change the ordering of the Columns, select one or more Columns in the Selected Columns box, and then click the Move Up or Move Down buttons to change the order of the Columns.
4. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen or click the Next button to create the Search Folder.

### Notes:

- A new Search Folder record will be created.

## 4.28.2. Modifying a Search Folder

Modify Search Folder modifies an existing Search Folder in the Document Manager. A Search Folder is used to view a set of Documents that all match certain criteria. For example, if you find yourself often performing a search for Documents using the same fields in Advanced Search, you could create a Search Folder with all the same criteria. Then anytime you need to look for those "Documents", you can simply view the Search Folder instead of re-entering all the search criteria on Advanced Search. Search Folders also allow you to customize the output of the search by selecting which columns to display in addition to the Doc Number column which is always shown.

- The Search Folder name cannot be the same as any other Search Folder the User has created.

**Navigation:** [DocMgr > My Work > Side Menu > Search Folders > Select Desired Search Folder > Side Menu > Modify]

### Step 1:

1. If applicable, modify the Search Folder name in the Name box. The Search Folder name must be unique among the other Search Folders the User has created. Name is a required field. The maximum length of this field is 255 characters.
2. If applicable, modify the Search Folder description in the Description box. The maximum length of this field is 255 characters.
3. If applicable, modify the Search Folder owner in the Owner box. This field is mandatory and cannot be left as Choose One. Note: Only an Admin can assign the owner of a Search Folder.
4. Click the Cancel button to cancel the command, or click the Next button to continue.

### Step 2:

If applicable, modify one or more criterion in the Document Criteria, Metric Criteria, and/or Keyword Criteria sections. The criteria entered here will be used to determine which Documents are displayed when viewing the results of a Search Folder. A Search Folder must have at least one criterion entered.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria are not case sensitive.
- The asterisk (\*) represents zero or more characters.
- The question mark (?) represents exactly one character.
- Multiple asterisks and/or question marks are allowed in the same word.
- Consecutive asterisks are not allowed but consecutive question marks are allowed.

- Search fields cannot contain only asterisks except for Keywords. A Keyword may be specified with a value of \* to signify any Document that has that Keyword regardless of the Keyword's value.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules.

### Document Criteria

The table below describes the Document Criteria:

Field	Search Criteria
<b>Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Title</b>	Enter the Document title, or part of the Document title followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.
<b>Create Date</b>	<p>Search for Documents created on a specific date. For example, Documents created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created for a range of dates. For example, Documents created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created since a specific date. For example, Documents created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents created prior to a specific date. For example, Documents created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Modify Date</b>	<p>Search for Documents last modified on a specific date. For example, Documents last modified on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents last modified for a range of dates. For example, Documents last modified from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p>

	<p>Search for Documents last modified since a specific date. For example, Documents last modified from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents last modified prior to a specific date. For example, Documents last modified prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Point of Contact</b>	Enter the Document point of contact, or part of the Document point of contact followed by an asterisk.
<b>Reserved By</b>	Click on the down arrow and select the name from the list.
<b>Doc Type</b>	Click on the down arrow and select a Document Type from the list.
<b>Doc Category</b>	Click on the down arrow and select a Document Category from the list.
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>In Review</b>	Click on the down arrow and select Yes or No from the list.
<b>Comments</b>	Click on the down arrow and select No Comments, Closed Comments or Open Comments from the list.
<b>Release Date</b>	<p>Search for Documents released on a specific date. For example, Documents released on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents released for a range of dates. For example, Documents released from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents released since a specific date. For example, Documents released from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents released prior to a specific date. For example, Documents released prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Last Revision</b>	Enter the last revision, or part of the last revision followed by an asterisk.

<b>Web Search</b>	Click on the down arrow and select web Search from the list.
<b>Read Access</b>	<p>Click on the down arrow and select Read access from the list.</p> <p>None - Documents do not have *Local Users (R), *Campus Users (R), *Community Users (R), or *Global Users (R) assigned with Read Access.</p> <p>Local - Documents do have *Local Users (R) assigned with Read Access.</p> <p>Campus - Documents do have *Campus Users (R) assigned with Read Access.</p> <p>Community - Documents do have *Community Users (R) assigned with Read Access.</p> <p>Global - Documents do have *Global Users (R) assigned with Read Access.</p>
<b>RMA Record</b>	Click the down arrow and select Yes or No.

Metric Criteria

The table below describes the Metric Criteria:

<b>Field</b>	<b>Search Criteria</b>
<b>Metric Status</b>	Click on the down arrow and select the Metric Status from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS metrics.
<b>Metric Resp. Official</b>	Click on the down arrow and select the Metric responsible official from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric POC</b>	Click on the down arrow and select the Metric point of contact from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric Organization</b>	Click on the down arrow and select the Metric Organization from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

<b>Metric Frequency</b>	Click on the down arrow and select the Metric frequency from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Reporting Lag Days</b>	Enter the reporting lag days. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

### Keyword Criteria

One more Keywords can be added as search criteria.

1. Click on the down arrow, select the Keyword from the list, and then click on the Add button. The Keyword will be added as a searchable field. Enter the Keyword, part of the Keyword followed by an asterisk, or just an asterisk. To remove the Keyword, click the Remove button.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen or click the Next button to continue.

### Step 3:

One or more Columns can be added to display when viewing the Search Folder's results. By default, the Doc Number field is always displayed.

1. If applicable, modify the Columns to display.
2. Select the Column(s) in the Columns box (on the left) to be added by clicking on the Column name. This will highlight the Column name.
3. Click the Add> button. The Add> button moves the highlighted Column to the Selected Columns box. To remove a Column from the Selected Columns box, highlight the Column and click the <Remove button. The <Remove All button removes all the Columns from the Selected Columns box.
4. If desired, the Columns order may be altered to change the order they appear when output. The first Column in the Selected Columns box will be the first Column on the left. The next Column down in the Selected Columns box will be the next Column from the left and so on. To change the ordering of the Columns, select one or more Columns in the Selected Columns box, and then click the Move Up or Move Down buttons to change the order of the Columns.
5. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen or click the Next button to modify the Search Folder.

### Notes:

- The Search Folder record will be modified.



### 4.28.3. Deleting a Search Folder

Delete Search Folder deletes an existing Search Folder in the Document Manager.

- The User must have Delete access to the Search Folder. Delete access is determined by the User being an Admin or the actual owner of the Search Folder.

**Navigation:** [DocMgr > My Work > Side Menu > Search Folders > Select Desired Search Folder > Side Menu > Delete]

#### Step 1:

The Search Folder to be deleted and the Search Folder attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

The Search Folder to be deleted and the Search Folder attributes are displayed.



1. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to delete the Search Folder.

### 4.28.4. Showing Search Folders

Show Search Folders displays all the Search Folders that you own in the Document Manager. If you have not yet created any Search Folders on the Document Manager, the following message will be displayed: "You don't have any Search Folders."

#### All Search Folders

**Navigation:** [DocMgr > My Work > Side Menu > Search Folders]

- The Name and Description are displayed for each Search Folder.
- The number of Search Folders is shown.
- Click on  to View the search results the specific Search Folder.
- Click on  to Show Info for the specific Search Folder.

A Specific Search Folder

**Navigation:** [DocMgr > My Work > Side Menu > Search Folders > Select Desired Search Folder]

Search Folder Info displays the full details for a specific Search Folder. The "contents" of a Search Folder are determined by meeting all of the specified criteria.

Field Name	Description
<b>Name</b>	The name of this Search Folder.
<b>Description</b>	The description of this Search Folder.
<b>Owner</b>	The Owner of this Search Folder.

#### Document Criteria

This shows the Document-related criteria that are used to determine which Documents will be displayed for this Search Folder.

#### Metric Criteria

This shows the Metric-related criteria that are used to determine which Documents will be displayed for this Search Folder.

#### Keyword Criteria

This shows the Keyword-related criteria that are used to determine which Documents will be displayed for this Search Folder.

#### Display Columns

This shows the Columns that have been selected to display for this Search Folder. Note: The Doc Number columns is always displayed.



### 4.28.5. Showing Search Folder Results

Show Search Folder Results displays all the Documents matching the criteria of the selected Search Folder. If the selected Search Folder does not match any Documents on the Document Manager, the following message will be displayed: "No Documents found matching the specified search criteria."

#### ***Search Folder Results***

***Navigation:*** [\[DocMgr > My Work > Side Menu > Search Folders > Select Desired Search Folder\]](#)

All of the Documents matching the criteria of the selected Search Folder will be displayed.

- The number of Search Folder results is shown.
- The Document Number and any additional Display Columns are displayed for each matching Document.
- Click on  to View the Document.
- Click on  to Show Info for the specific Document.

## 4.29. Searching

TechDoc provides several forms of searching on the Document Manager. As the name implies, Advanced Search allows a User to perform more advanced searches to locate all the different objects in the DM. On the other hand, Quick Search allows a User to quickly search for a Comment, Document, Folder, Group, or User (usually by name, abbreviation, and ID).

### 4.29.1. Performing an Advanced Search

A User can perform an Advanced Search in the Document Manager to locate Associations, Comments, Discussions, Documents, Folders, Generations, Groups, History, Records, Reviews, Review Teams, Users, or Votes. Each of the aforementioned items has a corresponding screen that allows a User to Search on almost every data field of that item. For instance, a Folder can be searched for by using its name, description, owner, create date, modify date, Organization, or Read access setting.

Association Search

**Navigation:** *[DocMgr > Advanced Search > Side Menu > Associations]*

To perform an Advanced Association Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:










Field	Search Criteria
<b>Association Type</b>	Click on the down arrow and select the type of list (Access, Commenters, Distribution or Notification).
	Search by only one of the following fields.
<b>Group</b>	Click on the down arrow and select the name of the Group. If User is not an Admin, the User can only Search for Associations by Shared Groups or Groups that they own.
<b>User</b>	Click on the down arrow and select a name from the list.
If the AllowAssocRemoteAccess System Property is set to No, the bottom of the screen will look like:	
	<p><i>If searching on Notification or Distribution, enter a Remote User's email address.</i></p> <p><i>If searching on Access, select an Authenticator and optionally enter a username.</i></p>
<b>Remote Data</b>	<p>When searching on Access for Remote Users, an Authenticator from the Authenticator drop down is required and a username in the text box is optional. If something is entered in the text box and an Authenticator is not selected in the drop down, an error message is displayed.</p> <p>When searching on Distribution or Notification, only the email address in the text box is needed. If an Authenticator is selected in the Authenticator drop down, an error message is displayed.</p>
If the AllowAssocRemoteAccess System Property is set to Yes, the bottom of the screen will look like:	
	<i>If searching on Notification or Distribution, enter a remote User's email address.</i>
<b>Remote Email</b>	When searching on Distribution or Notification enter the email address. You cannot Search on remote Users for type Access.

### Association Search Results










All the Associations that the User has Read access to and that match the Search criteria are displayed. A User with the Admin privilege can see all Associations.

- Depending on the level of security on the Association you may receive the following message: "There were (#) Cabinets, Folders or Documents that you don't have permission to view."
- If no Associations were found that matched the Search criteria, the following message will be displayed: "There are no Cabinets, Folders or Documents that meet your criteria."
- The Name/Number and Description/Title are displayed for each Association.
- The number of Cabinets, Folders and Documents that matched the Search criteria is shown.
- The Associations are listed in alphabetical order by the name/number grouped by Cabinet, Folder and Document.

Depending on the Search results, one or more of the items listed below may not be displayed.

- Click on  to Explore Document (view all Generations) of the specific Document.
  -  indicates that the specific Document is reserved.
  -  indicates that the specified Document is in Review.
  -  indicates that the specified Document is reserved and in Review.
  -  indicates that the specified Document is cancelled.
- Click on  to Show Info of the specific Document.
- Click on  to Fetch Latest Generation of the specific Document.
- Click on  or  to Show Comments for the specific Document. This icon will not be available if there are no Comments for the Document.
- Click on the Metric status icon to display the Metric Info of the specific Document. The Metric status icons will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant

 Red - Worsening




A late Metric icon will be displayed as opaque. For example: 

Stoplight Criteria

Green represents progress according to plan.

Yellow represents an area of concern.

Red represents a significant problem.

- Click on  to Explore Folder.
- Click on  to Explore Cabinet.
- Click on  to Show Info of the specific Folder/Cabinet.

Document Search

**Navigation:** [[DocMgr](#) > [Advanced Search](#) > [Side Menu](#) > [Documents](#)]

To perform an Advanced Document Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.

<b>Title</b>	Enter the Document title, or part of the Document title followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.
<b>Create Date</b>	<p>Search for Documents created on a specific date. For example, Documents created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created for a range of dates. For example, Documents created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents created since a specific date. For example, Documents created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents created prior to a specific date. For example, Documents created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Modify Date</b>	<p>Search for Documents last modified on a specific date. For example, Documents last modified on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents last modified for a range of dates. For example, Documents last modified from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents last modified since a specific date. For example, Documents last modified from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents last modified prior to a specific date. For example, Documents last modified prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Point of Contact</b>	Enter the Document point of contact, or part of the Document point of contact followed by an asterisk.
<b>Reserved By</b>	Click on the down arrow and select the name from the list.











<b>Doc Type</b>	Click on the down arrow and select a Document Type from the list.
<b>Doc Category</b>	Click on the down arrow and select a Document Category from the list.
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>In Review</b>	Click on the down arrow and select Yes or No.
<b>Attachments</b>	Click on the down arrow and select Yes or No.
<b>Comments</b>	Click on the down arrow and select No Comments, Closed Comments or Open Comments from the list.
<b>Release Date</b>	<p>Search for Documents released on a specific date. For example, Documents released on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents released for a range of dates. For example, Documents released from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Documents released since a specific date. For example, Documents released from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Documents released prior to a specific date. For example, Documents released prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Last Revision</b>	Enter the last revision, or part of the last revision followed by an asterisk.
<b>Web Search</b>	Click on the down arrow and select web Search from the list.
<b>Read Access</b>	<p>Click on the down arrow and select Read access from the list.</p> <p>None - Documents do not have *Local Users (R), *Campus Users (R), *Community Users (R), or *Global Users (R) assigned with Read Access.</p> <p>Local - Documents do have *Local Users (R) assigned with Read Access.</p>













	<p>Campus - Documents do have *Campus Users (R) assigned with Read Access.</p> <p>Community - Documents do have *Community Users (R) assigned with Read Access.</p> <p>Global - Documents do have *Global Users (R) assigned with Read Access.</p>
<b>RMA Record</b>	Click the down arrow and select Yes or No.
<b>Metric Info</b>	When searching on any of the Metric specific fields, only Documents that are Key Performance Indicator (KPI) metrics will be returned.
<b>Metric Status</b>	Click on the down arrow and select the Metric Status from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS metrics.
<b>Metric Resp. Official</b>	Click on the down arrow and select the Metric responsible official from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric POC</b>	Click on the down arrow and select the Metric point of contact from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric Organization</b>	Click on the down arrow and select the Metric Organization from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric Frequency</b>	Click on the down arrow and select the Metric frequency from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Reporting Lag Days</b>	Enter the reporting lag days. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>New Keyword</b>	Click on the down arrow and select the Keyword from the list. click on the Add button. The Keyword will be added as a searchable field. Enter the Keyword, part of the Keyword followed by an asterisk, or just an asterisk. To remove the Keyword, click the Remove button.


All the Documents that the User has read access to and that match the Search criteria are displayed. A User with the Admin privilege can see all Documents.

- Depending on the level of security on the Document, you may receive the following message: "There were (#) Documents that you don't have permission to view." This does not apply to an Admin.
- If no Documents were found that matched the Search criteria, the following message will be displayed: "No Documents found matching the specified Search criteria."
- The Number and Title are displayed for each Document.
- The number of Documents that matched the Search criteria is shown.
- The Documents are listed in alphabetical order by the Document number.

- Click on  to Explore Document (view all Generations) of the specific Document.
  -  indicates that the specific Document is reserved.
  -  indicates that the specified Document is in Review.
  -  indicates that the specified Document is reserved and in Review.
  -  indicates that the specified Document is cancelled.
- Click on  to Show Info of the specific Document.
- Click on  to Fetch Latest Generation of the specific Document.
- Click on  to Show Attachments on the specific Document.
- Click on  or  to Show Comments for the specific Document. This icon will not be available if there are no Comments for the Document.
- Click on the Metric status icon to display the Metric Info of the specific Document. The Metric status icons will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

A Metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening
-  Red - Improving
-  Red - Staying Constant
-  Red - Worsening

A late Metric icon will be displayed as opaque. For example: 

### Stoplight Criteria

Green represents progress according to plan.

Yellow represents an area of concern.

Red represents a significant problem.

### Folder Search

**Navigation:** [DocMgr > Advanced Search > Side Menu > Folders]

To perform an Advanced Folder Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:




Field	Search Criteria
<b>Name</b>	Enter the Folder name, or part of the Folder name followed by an asterisk.
<b>Description</b>	Enter the Folder description, or part of the Folder description followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.
<b>Create Date</b>	Search for Folders created on a specific date. For example, Folders created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.

	<p>Search for Folders created for a range of dates. For example, Folders created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Folders created since a specific date. For example, Folders created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Folders created prior to a specific date. For example, Folders created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Modify Date</b>	<p>Search for Folders last modified on a specific date. For example, Folders last modified on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Folders last modified for a range of dates. For example, Folders last modified from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Folders last modified since a specific date. For example, Folders last modified from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Folders last modified prior to a specific date. For example, Folders last modified prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>Read Access</b>	<p>Click on the down arrow and select Read access from the list.</p> <p>None - Folders do not have *Local Users (R) assigned with Read Access.</p> <p>Local - Folders do have *Local Users (R) assigned with Read Access.</p>

### Folder Search Results

All of the Folders/Cabinets that the User has Read access to and that match the Search criteria are displayed. A User with the Admin privilege can see all Folders/Cabinets.

- Depending on the level of security on the Folder, you may receive the following message: "There were (#) Cabinets and/or Folders that you don't have permission to view." This does not apply to an Admin.
- If no Folders/Cabinets were found that matched the Search criteria, the following message will be displayed: "No Folders found matching the specified Search criteria."
- The Name and Description are displayed for each Folder/Cabinet.
- The number of Cabinets and Folders that matched the Search criteria is shown.
- The Folders/Cabinets are listed in alphabetical order by the Folder/Cabinet name. Depending on the Search results, one or more of the items listed below may not be displayed.

- Click on  to Explore Folder.
- Click on  to Explore Cabinet.
- Click on  to Show Info of the specific Folder/Cabinet.

Generation Search

**Navigation:** *[DocMgr > Advanced Search > Side Menu > Generations]*

To perform an Advanced Generation Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Major Gen</b>	Only integers can be entered in this field. Asterisks are not allowed. Major Generation is the number of the Generation. For example 1, 2 etc.




<b>Minor Gen</b>	Only integers can be entered in this field. Asterisks are not allowed. Minor Generation is the number of the Generation. For example 1.1, 2.1 etc.
<b>Creator</b>	Click on the down arrow and select a name from the list.
<b>Create Date</b>	<p>Search for Generation created on a specific date. For example, Generations created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Generations created for a range of dates. For example, Generations created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Generations created since a specific date. For example, Generations created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Generations created prior to a specific date. For example, Generations created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Revision</b>	Enter the Generation revision, or part of the Generation revision followed by an asterisk.
<b>Released Date</b>	<p>Search for Generations released on a specific date. For example, Generations created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Generations released for a range of dates. For example, Generations created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Generations released since a specific date. For example, Generations created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Generations released prior to a specific date. For example, Generations created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>File Name</b>	Enter the file name, or part of the file name followed by an asterisk. You can also enter the file extension, or part of the file extension

	followed by an asterisk. File Name is the name for this Generation when this Generation is fetched.
<b>Mime Type</b>	Click on the down arrow and select Mime Type from the list.
<b>Attachments</b>	Click on the down arrow and select Yes or No.
<b>File Encrypted</b>	Click on the down arrow and select Yes or No.
<b>Native</b>	Click on the down arrow and select Yes or No. Yes only returns native generations and No only returns the rendered versions of generations.
<b>RMA Record</b>	Click the down arrow and select Yes or No.
<b>Resident</b>	Click the down arrow and select Yes or No.
<b>Fetch Access</b>	Click on the down arrow and select Fetch Access from the list. Only an Admin can search using this option.
<b>File Area</b>	Click on the down arrow and select the File Area from the list. Only an Admin can search using this option.
<b>Has password</b>	Click on the down arrow and select Yes or No from the list. Only an Admin can search using this option.
When searching on any of the Metric specific fields, only Generations belonging to Documents that are Key Performance Indicator (KPI) metrics will be returned.	
<b>Metric Status</b>	Click on the down arrow and select the Metric status from the list. This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.
<b>Metric Date</b>	<p>This field will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.</p> <p>Search for Generations for a specific Metric date. For example, Generations with Metric date of 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Generations for a range of Metric dates. For example, Generations with Metric dates from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Generations since a specific Metric date. For example, Generations with Metric dates from 01/19/2007 to present date. Enter</p>








	<p>01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Generations prior to a specific Metric date. For example, Generations with Metric dates prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
--	---

## Generation Search Results




All the Generations that the User has Read access to and that matched the Search criteria are displayed.


- Depending on the level of security on the Generation, you may receive the following message: "There were (#) Generations that you don't have permission to view." This does not apply to an Admin.
- If no Generations were found that matched the Search criteria, the following message will be displayed: "No Generations found matching the specified Search criteria."
- The Number and Description are displayed for each Generation.
- The number of Generations that matched the Search criteria is shown.
- The Description contains the file name of the Generation when fetched, date the Generation was created, and size of the file.
- The Generations are listed in alphabetical order by the number.
- Click on the icon to Explore the Generation. The icon displayed will depend on the application associated with the Generation.
- Click on  to Show Info of the specific Generation.
- Click on  to Fetch this Generation.
- Click on  to Show Attachments on this Generation.
- Click on the Metric status icon to display the Metric Info of the specific Document. The Metric status icons will only be displayed if this system supports the Key Performance Indicator (KPI) Tool for NMIS Metrics.

A metric status can be:

-  Inactive
-  Green - Improving
-  Green - Staying Constant
-  Green - Worsening
-  Yellow - Improving
-  Yellow - Staying Constant
-  Yellow - Worsening



-  Red - Improving
-  Red - Staying Constant
-  Red - Worsening

A late metric icon will be displayed as opaque. For example: 

### Stoplight Criteria

Green represents progress according to plan.

Yellow represents an area of concern.

Red represents a significant problem.

### Group Search

**Navigation:** [[DocMgr](#) > [Advanced Search](#) > [Side Menu](#) > [Groups](#)]

To perform an Advanced Group Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules






The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Name</b>	Enter the Group name, or part of the Group name followed by an asterisk. If User is not an Admin, the User can only Search for shared Groups or Groups that they own.
<b>Description</b>	Enter the Group description, or part of the Group description followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.

<b>Create Date</b>	<p>Search for Groups created on a specific date. For example, Groups created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Groups created for a range of dates. For example, Groups created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Groups created since a specific date. For example, Groups created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Groups created prior to a specific date. For example, Groups created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>Group Type</b>	Click on the down arrow and select a Group type private or shared. Only an Admin can Search on Group type.
<b>Member Type</b>	<p>Local Users - Users that have accounts on this Document Manager.</p> <p>Remote Emails - Email addresses.</p> <p>Remote Users - Users that do not have an account on this Document Manager but have an account on one of the Authenticators trusted by this Document Manager, i.e. someone in the Windows domain that does not have a TechDoc account would use their Windows domain username.</p>
Select only one of the following three options. If also searching on a member type, choose that type.	
<b>Local User</b>	Click on the down arrow and select a Local User from the list.
<b>Remote Email</b>	Click on the down arrow and select a Remote Email from the list.
<b>Remote User</b>	Click on the down arrow and select a Remote User from the list.

## Group Search Results

All the Shared Group that the User has Read access to (or Groups that you own) and that matched the Search criteria are displayed. A User with the Admin privilege can see all Groups.

- Depending on the Read access on the Group, you may receive the following message: "There were (#) Groups that you don't have permission to view."
- If no Groups were found that matched the Search criteria, the following message will be displayed: "No Groups found matching the specified Search criteria."
- The Name and Description are displayed for each Group.
- The number of Groups that matched the Search criteria is shown.
- The Groups are listed in alphabetical order by the member type. Member types are: Local Users, Remote Emails and Remote Users
- Click on  to View Local Users Group Info for the specific Group.
- Click on  to View Remote Emails Group Info for the specific Group.
- Click on  to View Remote Users Group Info for the specific Group.
- Click on  to View System Group Info for the specific Group.
- Click on  to Show Info of the specific Group.

History Search

**Navigation:** [DocMgr > Advanced Search > Side Menu > History]

To perform an Advanced History Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria. Only an Admin can Search History.

Here are a few rules to remember when specifying Search criteria:



- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

Field	Search Criteria
Target Type	Click on the down arrow and select a target type from the list.

<b>Target Name</b>	Enter the target name, or part of the target name followed by an asterisk.
<b>Action</b>	Click on the down arrow and select an action from the list.
<b>Create Date</b>	<p>Search for History created on a specific date. For example, History created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for History created for a range of dates. For example, History created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for History created since a specific date. For example, History created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for History created prior to a specific date. For example, History created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Username</b>	Enter the username, or part of the username followed by an asterisk.
<b>IP Address</b>	Enter the IP Address. An asterisk cannot be used when searching for an IP address.
<b>Details</b>	Enter the details, or part of the details followed by an asterisk.
<b>Reason</b>	Enter the reason, or part of the reason followed by an asterisk. Note that this is not a normal reason field. It is not a required field that gets stored in History. It is used to Search for a reason that a previous User has entered.

## History Search Results

All the History that matched the Search criteria is displayed.

- The Date, Username, Action, and Target are displayed for each History.
- The number of actions that matched the Search criteria is shown.
- The History listed in numerical order by the date.
- Click on  or  to View History Details.

## User Search

**Navigation:** *[DocMgr > Advanced Search > Side Menu > Users]*

To perform an Advanced User Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Username</b>	Enter the User's username, or part of the username followed by an asterisk.
<b>Last Name</b>	Enter the User's last name, or part of the last name followed by an asterisk.
<b>First Name</b>	Enter the User's first name, or part of the first name followed by an asterisk.
<b>Middle Initial</b>	Enter the User's middle initial.
<b>UUPIC</b>	Enter the User's UUPIC.
<b>Email Address</b>	Enter the User's email address, or part of the email address followed by an asterisk.
<b>Location</b>	Enter the User's location, or part of the location followed by an asterisk. This is usually a physical location, such as Bldg/Room, etc.
<b>Mail Code</b>	Enter the User's mail code, or part of the mail code followed by an asterisk.
<b>Phone Number</b>	Enter the User's phone number, or part of the phone number followed by an asterisk.



<b>Employer</b>	Click on the down arrow and select the User's Employer from the list.
<b>Organization</b>	Click on the down arrow and select the User's Organization from the list.
<b>Create Date</b>	<p>Search for Users created on a specific date. Only an Admin can Search on the create date. For example, Users created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Users created for a range of dates. For example, Users created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Users created since a specific date. For example, Users created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Users created prior to a specific date. For example, Users created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Last Login</b>	<p>Search for User's last login on a specific date. Only an Admin can Search on the last login. For example, User's last login on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for User's last login for a range of dates. For example, User's last login from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for User's last login since a specific date. For example, User's last login from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for User's last login prior to a specific date. For example, User's last login prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>User Priv</b>	Click on the down arrow and select the User's privilege from the list. Only an Admin can Search on User privileges.
<b>Disabled</b>	<p>Click on the down arrow and select one of the following:</p> <p>No - User account is not disabled.</p>

	<p>Yes - User account has been completely disabled manually by the Admin. User can only be re-enabled by using the Modify User screen to change it back.</p> <p>Password - User account has been disabled from logging in due to incorrectly entering a password too many times or from their password expiring. User can be re-enabled by using the Modify User, Reset Password, or Forgot Password screens. Only an Admin can Search on the disabled setting.</p>
<p><b>Account Expiration</b></p>	<p>Search for User's account expiration on a specific date. Only an Admin can Search on account expiration. For example, User's account expiration on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for User's account expiration for a range of dates. For example, User's account expiration from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for User's account expiration since a specific date. For example, User's account expiration from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for User's account expiration prior to a specific date. For example, User's account expiration prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<p><b>Password Expiration</b></p>	<p>Search for User's password expiration on a specific date. Only an Admin can Search on password expiration. For example, User's password expiration on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for User's password expiration for a range of dates. For example, User's password expiration from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for User's password expiration since a specific date. For example, User's password expiration from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p>

	Search for User's password expiration prior to a specific date. For example, User's password expiration prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.
<b>Security Answer</b>	Enter the security answer, or part of the security answer followed by an asterisk. The security answer is the answer to the security question that allows a User to use the forgot password function to reset their own password. Only an Admin can Search on security answers.
<b>Comments</b>	Enter the Comments, or part of the Comments followed by an asterisk. Only an Admin can Search on Comments.
<b>Authenticator</b>	Click on the down arrow and select the User's Authenticator from the list. Only an Admin can Search on Authenticators.

### User Search Results

All the Users that matched the Search criteria are displayed.

- If no Users were found that matched the Search criteria, the following message will be displayed: "No Users found matching the specified Search criteria."
- The Username and Full Name are displayed for each User.
- The number of Users that matched the Search criteria is shown.
- The Users are listed in alphabetical order by their Full Name.
- Click on  to View User the specific User.
- Click on  to Show Info of the specific User.

### Review Search

**Navigation:** [\[DocMgr > Advanced Search > Side Menu > Reviews\]](#)

To perform an Advanced Review Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word



- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules




The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Doc Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Revision</b>	Enter the revision, or part of the revision followed by an asterisk.
<b>Leader</b>	Click on the down arrow and select a name from the list.
<b>Review Team</b>	Click on the down arrow and select a Review Team from the list.
<b>State</b>	Click on the down arrow and select a state from the list.
<b>Start Date</b>	<p>Search for Reviews started on a specific date. For example, Reviews started on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Reviews started for a range of dates. For example, Reviews started from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Reviews started since a specific date. For example, Reviews started from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Reviews started prior to a specific date. For example, Reviews started prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Due Date</b>	<p>Search for Reviews due on a specific date. For example, Reviews due on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Reviews due for a range of dates. For example, Reviews due from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p>

	<p>Search for Reviews due since a specific date. For example, Reviews due from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Reviews due prior to a specific date. For example, Reviews due prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>End Date</b>	<p>Search for Reviews that ended on a specific date. For example, Reviews that ended on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Reviews that ended for a range of dates. For example, Reviews that ended from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Reviews that ended since a specific date. For example, Reviews that ended from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Reviews that ended prior to a specific date. For example, Reviews that ended prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>

## Review Search Results

All the Reviews that the User has read access to or Reviews that the User leads and that matched the Search criteria are displayed. A User with the Admin privilege can see all Reviews.

- Depending on the Read access to the Documents of the Reviews that meet the Search criteria, you may receive the following message: "There were (#) Reviews that you don't have permission to view."
- If no Reviews were found that matched the Search criteria, the following message will be displayed: "No Reviews found matching the specified Search criteria."
- The Name, Started Date, State and State Date are displayed for each Review.
- The number of Reviews that matched the Search criteria is shown.
- The Reviews are listed in chronological order by state date with the Reviews whose states have changed most recently at the top.
- Click on  to View the specific Review.
- Click on  to Show Info of the specific Review.
- Click on  to Show Discussions on the specific Review. This icon will only be available if there are Discussion records for the Review.

## Discussion Search

**Navigation:** [DocMgr > Advanced Search > Side Menu > Discussions]

To perform an Advanced Discussion Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules











The table below describes the fields and Search criteria:




Field	Search Criteria
<b>Doc Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Announcement</b>	Click on the down arrow and select a value from the list.
<b>Posted By</b>	Click on the down arrow and select a name from the list.
<b>Posted Date</b>	<p>Search for Discussions posted on a specific date. For example, Discussions posted on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Discussions posted for a range of dates. For example, Discussions posted from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Discussions posted since a specific date. For example, Discussions posted from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Discussions posted prior to a specific date. For example, Discussions posted prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>

<b>Subject</b>	Enter the subject to Search for or any part of the subject with wild cards.
<b>Has Attachment</b>	Click on the down arrow and select Yes or No from the list.
<b>Body Text</b>	Enter the body text of the Discussion or any part of the body text with wild cards.

### Discussion Search Results

All the Discussions of Documents that the User has Read access to and that match the Search criteria are displayed. A User with the Admin privilege can see all Discussions for all Documents.

- Depending on the level of security on the Document for Discussions that meet the Search criteria, you may receive the following message: "There were (#) Discussions that you don't have permission to view."
- If no Discussions were found that matched the Search criteria, the following message will be displayed: "No Discussions found matching the specified Search criteria."
- The Name, Subject, Replies, and Review Name are displayed for each Discussion.
- The number of Discussions that matched the Search criteria is shown.
- The Discussions are listed in chronological order with the most recently created Discussions at the top.
- Click on  to Show Topic details of a Discussion topic.
- Click on  to Show Topic details of a Discussion topic that has been assigned a priority.
- Click on  to Show Topic details of a vote Discussion topic.
- Click on  to Show Discussion details of a Discussion. If a Discussion is a remark for a vote cast then the icon displayed will be one of the following:
  -  Approve
  -  Concur with remarks
  -  Concur pending resolution of remarks
  -  Nonconcur
  -  Autoconcur
  -  Waive

- Click on  to Show Info of the specific Discussion.
- Click on  to Fetch the attachment of the specific Discussion. This icon will not be available if there is no attachment.
- Click on  to Reply to the Discussion.

### Vote Search

**Navigation:** [DocMgr > Advanced Search > Side Menu > Votes]

To perform an Advanced vote Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules










The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Voter's Name</b>	Click on the down arrow and select a name from the list.
<b>Remote Voter's Name</b>	Click on the down arrow and select a Remote Voter from the list.
<b>Organization</b>	Click on the down arrow and select an organization from the list.
<b>Votes Cast</b>	Click on the down arrow and select a type of vote cast from the list.
<b>Vote Date</b>	Search for Votes cast on a specific date. For example, Votes cast on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.
	Search for Votes cast for a range of dates. For example, Votes cast from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.

	<p>Search for Votes cast since a specific date. For example, Votes cast from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Votes cast prior to a specific date. For example, Votes cast prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
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## Vote Search Results

All the Votes for Reviews that the User has Read access to that matched the Search criteria are displayed. A User with the Admin privilege can see all Votes.

- Depending on the Read access to the Documents of the Reviews of the Votes that meet the Search criteria, you may receive the following message: "There were (#) Reviews that you don't have permission to view."
- If no Votes were found that matched the Search criteria, the following message will be displayed: "No Votes found matching the specified Search criteria."
- The Voter, Organization, Vote Cast, Vote Date, Review Name and Level are displayed for each vote.
- The number of Votes that matched the Search criteria is shown.
- The Votes are listed in chronological order by vote date with the Votes cast most recently at the top.
- Click on  to View the specific Review Voter.
- Click on  to Show Info of the specific Review Voter.
- The third graphic displayed represents the vote cast:
  -  No vote cast
  -  Approve
  -  Concur with remarks
  -  Concur pending resolution of remarks
  -  Nonconcur
  -  Autoconcur
  -  Waive

## Comment Search

**Navigation:** [\[DocMgr > Advanced Search > Side Menu > Comments\]](#)

To perform an Advanced Comment Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules



The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Doc Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Open Date</b>	<p>Search for Comments opened on a specific date. For example, Comments opened on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Comments opened for a range of dates. For example, Comments opened from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Comments opened since a specific date. For example, Comments opened from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Comments opened prior to a specific date. For example, Comments opened prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Commenter</b>	Click on the down arrow and select a name from the list.
<b>Close Date</b>	Search for Comments closed on a specific date. For example, Comments closed on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.



	<p>Search for Comments closed for a range of dates. For example, Comments closed from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Comments closed since a specific date. For example, Comments closed from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Comments closed prior to a specific date. For example, Comments closed prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Closed By</b>	Click on the down arrow and select a name from the list.
<b>Has Attachment</b>	Click on the down arrow and select Yes or No from the list.
<b>Comment Text</b>	Enter the body text of the Comment or any part of the body text with wild cards.

### Comment Search Results

Note: All the Comments of Documents that the User has Read access to and that match the Search criteria are displayed. "A User with the Admin privilege can see all Comments for all Documents."

- Depending on the level of security on the Document for Comments that meet the Search criteria, you may receive the following message: "There were (#) Comments that you don't have permission to view."
- If no Comments were found that matched the Search criteria, the following message will be displayed: "No Comments found matching the specified Search criteria."
- The ID, Open Date, Commenter, Document Number, Generation and Close Date are displayed for each Comment.
- The number of Comments that matched the Search criteria is shown.
- The Comments are listed in chronological order with the most recently opened Comments at the top.
- If the Comments have more characters or lines than the limit set in the System Properties CommentBriefCharLimit or CommentBriefLineLimit, a [More...](#) link is displayed which when clicked, displays the full Comment with details.
- Click on  to Show Comment details of an open Comment.
- Click on  to Show Comment details of a closed Comment.



- Click on  to Show Info of the specific Comment.
- Click on  to Fetch the attachment of the specific Comment. This icon will not be available if there is no attachment.

### Review Team Search

**Navigation:** [DocMgr > Advanced Search > Side Menu > Review Teams]

To perform an Advanced Review Team Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:



- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Name</b>	Enter the name, or part of the Document number followed by an asterisk.
<b>Description</b>	Enter the revision, or part of the revision followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.
<b>Review Team Type</b>	Click on the down arrow and select Private or Shared from the list.
<b>Subteam</b>	Click on the down arrow and select a Subteam/Group from the list.
<b>Voter</b>	Click on the down arrow and select a name from the list.
<b>Remote Voter</b>	Click on the down arrow and select a Remote Voter from the list.

### Review Team Search Results

All the Review Teams that the User has Read access to and that matched the Search criteria are displayed. A User with the Admin privilege can see all Review Teams.

- If there are Private Review Teams not owned by the current User that would meet the Search criteria the following message will be displayed: "There were (#) Review Teams that you don't have permission to view."
- If no Review Teams were found that matched the Search criteria, the following message will be displayed: "No Review Teams found matching the specified Search criteria."
- The Name and Description are displayed for each Review Team.
- The number of Review Teams that matched the Search criteria is shown.
- The Review Teams are listed in alphabetical order by name.
- Click on  to View the specific Review Team.
- Click on  to Show Info of the specific Review Team.

## Records Search

**Navigation:** [[DocMgr](#) > [Advanced Search](#) > [Side Menu](#) > [Records](#)]

To perform an Advanced Record Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:

Field	Search Criteria
<b>ID</b>	Enter the RMA Record ID.
<b>RMA Record Set</b>	Click on the down arrow and select an RMA Record Set from the list.
<b>Subject</b>	Enter the Record subject.



<b>Doc Number</b>	Enter the Document number, or part of the Document number followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a User from the list.
<b>Date Filed</b>	<p>Search for Records filed on a specific date. For example, Records filed on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Records filed for a range of dates. For example, Records filed from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Records filed since a specific date. For example, Records filed from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Records filed prior to a specific date. For example, Records filed prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Date Received</b>	<p>Search for Records received on a specific date. For example, Records received on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Records received for a range of dates. For example, Records received from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Records received since a specific date. For example, Records received from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Records received prior to a specific date. For example, Records received prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Publication Date</b>	<p>Search for Records published on a specific date. For example, Records published on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Records published for a range of dates. For example, Records published from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p>

	<p>Search for Records published since a specific date. For example, Records published from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Records published prior to a specific date. For example, Records published prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Last Review Date</b>	<p>Search for Records last reviewed on a specific date. For example, Records last reviewed on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Records last reviewed for a range of dates. For example, Records last reviewed from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Records last reviewed since a specific date. For example, Records last reviewed from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Records last reviewed prior to a specific date. For example, Records last reviewed prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Frozen</b>	Click on the down arrow and select Yes or No from the list.
<b>Permanent</b>	Click on the down arrow and select Yes or No from the list.
<b>Vital</b>	Click on the down arrow and select Yes or No from the list.
<b>New RMA Keyword</b>	Click the down arrow, select an RMA Keyword from the list, click Add, and either select or enter a value for the RMA Keyword. To remove a previously added RMA Keyword, click it's corresponding Remove button.

## Records Search Results

All Records that the User has Read access to and that matched the Search criteria are displayed. A User with the Admin privilege can see all Records.

- Depending on the Read access on the Record, you may receive the following message:  
"There were (#) Records that you don't have permission to view."

- If no Records were found that matched the Search criteria, the following message will be displayed: "No Records found matching the specified Search criteria."
- The ID and Doc Number are displayed for each Record.
- The number of Records that matched the Search criteria is shown.
- The Records are listed in alphabetical order by ID.
- Click on  to View RMA Record Info for the specific Record.
- Click on  to Show Info of the specific Record.

### Project Search

**Navigation:** [[DocMgr](#) > [Advanced Search](#) > [Side Menu](#) > [Projects](#)]

To perform an Advanced Project Search, enter data in one or more Search fields, adjust the Search options if necessary, and press the OK button to submit the request. Pressing the Clear Input button will reset all of the Search criteria.

Here are a few rules to remember when specifying Search criteria:

- The Search criteria is not case sensitive
- The asterisk (\*) represents zero or more characters
- The question mark (?) represents exactly one character
- Multiple asterisks and/or question marks are allowed in the same word
- Consecutive asterisks are not allowed but consecutive question marks are allowed
- Search fields cannot contain only asterisks.
- Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules

The table below describes the fields and Search criteria:

Field	Search Criteria
<b>Name</b>	Enter the Project name, or part of the Project name followed by an asterisk. If User is not an Admin, the User can only Search for Projects that they own.
<b>Description</b>	Enter the Project description, or part of the Project description followed by an asterisk.
<b>Owner</b>	Click on the down arrow and select a name from the list.
<b>Organization</b>	Click on the down arrow and select the Organization from the list.
<b>Create Date</b>	Search for Projects created on a specific date. For example, Projects created on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.



	<p>Search for Projects created for a range of dates. For example, Projects created from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects created since a specific date. For example, Projects created from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Projects created prior to a specific date. For example, Projects created prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Modify Date</b>	<p>Search for Projects modified on a specific date. For example, Projects modified on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects modified for a range of dates. For example, Projects modified from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects modified since a specific date. For example, Projects modified from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Projects modified prior to a specific date. For example, Projects modified prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Scheduled Start Date</b>	<p>Search for Projects scheduled to start on a specific date. For example, Projects scheduled to start on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects scheduled to start for a range of dates. For example, Projects scheduled to start from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects scheduled to start since a specific date. For example, Projects scheduled to start from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p>

	<p>Search for Projects scheduled to start prior to a specific date. For example, Projects scheduled to start prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Scheduled Finish Date</b>	<p>Search for Projects scheduled to finish on a specific date. For example, Projects scheduled to finish on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects scheduled to finish for a range of dates. For example, Projects scheduled to finish from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects scheduled to finish since a specific date. For example, Projects scheduled to finish from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Projects scheduled to finish prior to a specific date. For example, Projects scheduled to finish prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Actual Start Date</b>	<p>Search for Projects started on a specific date. For example, Projects started on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects started for a range of dates. For example, Projects started from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects started since a specific date. For example, Projects started from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Projects started prior to a specific date. For example, Projects started prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
<b>Actual Finish Date</b>	<p>Search for Projects finished on a specific date. For example, Projects finished on 02/03/2007. Enter 02/03/2007 to 02/03/2007 in the date boxes. Use: mm/dd/yyyy.</p>

	<p>Search for Projects finished for a range of dates. For example, Projects finished from 01/18/2007 to 01/23/2007. Enter 01/18/2007 to 01/23/2007 in the date boxes. Use: mm/dd/yyyy.</p> <p>Search for Projects finished since a specific date. For example, Projects finished from 01/19/2007 to present date. Enter 01/19/2007 in first date box. Leave second date box blank. Use: mm/dd/yyyy.</p> <p>Search for Projects finished prior to a specific date. For example, Projects finished prior to 01/23/2007. Enter 01/23/2007 in second date box. Leave first date box blank. Use: mm/dd/yyyy.</p>
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### Project Search Results

All the Projects that the User has Read access to and that matched the Search criteria are displayed. A User with the Admin privilege can see all Projects.

- Depending on the Read access on the Project, you may receive the following message: "There were (#) Projects that you don't have permission to view."
- If no Projects were found that matched the Search criteria, the following message will be displayed: "No Projects found matching the specified Search criteria."
- The Name and Description are displayed for each Project.
- The number of Projects that matched the Search criteria is shown.
- The Projects are listed in alphabetical order by the Name.
- Click on  to View Project Info for the specific Project.
- Click on  to Show Info of the specific Project.

#### 4.29.2. Performing a Quick Search

A User can perform a Quick Search in the Document Manager to quickly locate a Comment, Document, Folder, Group, Project, or User. When an item is entered into the Quick Search box, the item entered and the ID of that item will be checked. For example, if 1001 is entered in the box while Document is selected, a Document with the ID of 1001 will match and so would a Document that happens to have the Document Number '1001'. If this happens, both Documents would be listed (just like any other time multiple items match) and you simply pick the one you actually wanted.

Note: If searching for an item by its ID, you cannot use asterisks.

Here are a few rules to remember when specifying Search criteria:



- The Search criteria is not case sensitive
  - The asterisk (\*) represents zero or more characters
  - The question mark (?) represents exactly one character
  - Multiple asterisks and/or question marks are allowed in the same word
  - Consecutive asterisks are not allowed but consecutive question marks are allowed
  - Search fields cannot contain only asterisks.
  - Asterisks and question marks may be positioned anywhere in a word as long as they don't break any of the previous rules
1. In the Search by box, click on the down arrow and select the item to Search; for example: Comment, Document, Folder, Group, Project, or User.

When searching for a User's name you can enter User's first name, last name, or User account name.

2. Enter Search criteria in the For box.
3. Click the OK button to submit the request.

Notes:

- If the User searched for a Comment, the Comment is displayed if the Comment exists and the User has Read Access to the Document.
- If the User searched for Documents, all the Documents that the User has Read Access to and that match the Search criteria are shown.
- If the User searched for Folder/Cabinets, all the Folder/Cabinets that the User has Read Access to and that match the Search criteria are shown.
- If the User searched for groups, all the groups that the User has Read Access to and that match the Search criteria are shown.
- If the User searched for projects, all the projects that the User has Read Access to and that match the Search criteria are shown.
- If the User searched for Users, all Users that match the Search criteria are shown.

### 4.30. Workflows Management Menu

The Workflows Management menu contains all of the functioning for creating and managing Workflow Deployments, Definitions, Processes, and Process Triggers. This menu also displays Workflow Tasks that need attention, Tasks that are open to claim, and process instances started by you. Currently, this menu is only available to Users with the Workflows privilege or Administrators.

**Navigation:** *[DocMgr > Workflows]*

A User with the Workflows Manager or Admin privilege will have access to all of the Workflows Management functions. A User with the Workflows privilege will only have access to their Workflow Processes.

### 4.30.1. Creating a Workflow Deployment

Create Workflow Deployment creates a new Workflow Deployment in the Document Manager. A Workflow Deployment is a package (a .bar file) containing one or more Workflow Process Definitions their resources and/or images. In order to manually create a Workflow Deployment, you must save your process/processes from your BPMN editor as a .bar file (Activiti Business Archive File). Using the BPMN Editor, after creating a Workflow Process and saving it, select Save As from the File menu, and choose "Activiti business archive File (.bar)" from the Files of Type drop down when saving.

- The user must have the Workflows, Workflows Manager, or Admin privilege.

**Navigation:** *[DocMgr > Workflows > Side Menu > Create Deployment]*

#### Step 1:

1. Enter the name of the Deployment in the Name box. This is a required field. The maximum length of this field is 255 characters.
2. Select the Deployment owner in the Owner box by clicking on the down arrow and selecting a name from the list.

Note: Only an Admin can select the owner of a Deployment.

3. Enter reason for creating the Workflow Deployment in the Reason box. This is a required field. The maximum length of this field is 255 characters.
4. Click the Cancel button to cancel the command, or click the Next button to continue.

#### Step 2:

A Workflow Deployment file is an archive (.bar) file containing one or more Workflow Processes.

1. At the Deployment box click on the Browse... button to locate the Workflow Deployment to be load into the Document Manager.

Note: The File Upload box will be displayed.

2. In the Look in box select the drive/folder where the Deployment to be stored in the Document Manager is located. To display all of the files in the folder, click on the down arrow and select All Files (\*.\*). Click on the Deployment to be stored in the Document

Manager. This will automatically insert the filename in the File name box. Click the Open button.

3. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to create the Workflow Deployment.

Notes:

- A new Workflow Deployment Mapping record will be created.
- The Workflow Deployment will be inserted into the Workflow Engine.
- A history record will be generated for creation of the Workflow Deployment.

### 4.30.2. Deleting a Workflow Deployment

Delete Workflow Deployment deletes an existing Workflow Deployment in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have Owner access to the Workflow Deployment.

**Navigation:** [DocMgr > Workflows > Side Menu > Deployments > Select Desired Deployment > Side Menu > Delete]

#### **Step 1:**

The Deployment to be deleted and the Deployment attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

#### **Step 2:**

The Deployment to be deleted and the Deployment attributes are displayed.

1. Enter the reason for deleting the Deployment in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Workflow Deployment.

Notes:

- The Workflow Deployment Mapping record will be deleted.
- The Workflow Deployment will be retracted from the Workflow engine.
- A history record will be generated for deletion of the Workflow Deployment.

### 4.30.3. Modifying a Workflow Deployment

Modify Workflow Deployment modifies an existing Deployment in the Document Manager. A Deployment is a bar file package that contains one or more workflow process definitions and various resource files needed by the deployment. Typically, Workflow Deployments are created using the DocuBrain Workflow Editor and are uploaded directly to the TechDoc Document Manager where they will execute. If they need to be modified, they should be downloaded using the Workflow Editor, modified, and then re-uploaded to the Document Manager. The Modify Workflow Deployment servlet only allows an Admin to re-assign the owner of the deployment.

- The user must have the Admin privilege.

**Navigation:** [*DocMgr > Workflows > Side Menu > Deployments > Select Desired Deployment > Side Menu > Modify*]

#### Step 1:

1. If applicable, modify the owner of the Workflow Deployment by clicking on the down arrow and selecting a new owner from the list.
2. Enter reason for modifying the Workflow Deployment in the Reason box. This is a required field. The maximum length of this field is 255 characters.
3. Click the Cancel button to cancel the command, or click the OK button to modify the Workflow Deployment.

Notes:

- The existing Workflow Deployment record will be modified.
- A history record will be generated for the modification of the Workflow Deployment.

### 4.30.4. Showing a Workflow Deployment

Displays Workflow Deployments created in the Document Manager

#### ***A Specific Workflow Deployment***

**Navigation:** [*DocMgr > Workflows > Side Menu > Deployments > Select Desired Deployment*]


The User must have read access to the Workflow Deployment.

Field Name	Description
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<b>Deployment ID</b>	The ID used by the Workflow engine to uniquely identify this Deployment.
<b>Name</b>	The name of this Workflow Deployment.
<b>Created</b>	The date and time the Deployment was created.
<b>Deployment Time</b>	The date and time the Deployment was deployed in the Workflow engine.
<b>Owner</b>	The User that owns this Deployment. Click the owner's name link to display the User Info screen.

### Process Definitions

This section contains all of the Process Definitions contained in this Deployment. The Name, Process Definition ID, Key, and Version will be displayed for each Process Definition in the Deployment.

- Click on  to Show Info of the specific Process Definition.

### Deployment Resources


This section contains all of the resources contained in this Deployment. The filename will be displayed for each resource in the Deployment.

- Click on  to Fetch the specific Deployment resource.

### All Workflow Deployments

**Navigation:** [\[DocMgr > Workflows > Side Menu > Deployments > Side Menu > All Deployments\]](#)


All Workflow Deployments displays all the Deployments that have been created in the Document Manager. Note: Only a User with the Workflows Manager or Admin privilege can show All Deployments.

- The Deployment ID, Name, and Deployment Time are displayed for each Deployment.
- The number of Deployments is shown.
- Click on  to Show Info for the specific Deployment.

### My Workflow Deployments

**Navigation:** [\[DocMgr > Workflows > Side Menu > Deployments > Side Menu > My Deployments\]](#)

My Workflow Deployments displays all the Deployments that you currently own in the Document Manager.

- The Deployment ID, Name, and Deployment Time are displayed for each Deployment.
- The number of Deployments is shown.
- Click on  to Show Info for the specific Deployment.

#### 4.30.5. Showing a Workflow Process Definition

Displays Workflow Process Definitions created in the Document Manager

##### ***A Specific Workflow Process Definition***

**Navigation:** [[DocMgr](#) > [Workflows](#) > [Side Menu](#) > [Process Definitions](#) > [Select Desired Process Definition](#)]

The User must have read access to the Workflow Process Definition.

Field Name	Description
<b>Process Definition ID</b>	The ID used by the Workflow engine to uniquely identify this Process Definition. This ID is a combination of the Process Definition's Key and Version number.
<b>Name</b>	The name of this Process Definition.
<b>Version</b>	The version of number of this Process Definition. "1" represents an original deployment of a Process Definition while subsequent numbers represent each revision.
<b>Deployment ID</b>	The ID used by the Workflow engine to uniquely identify the Deployment this Process Definition belongs to. Click the Deployment ID link to display the Deployment Info screen.
<b>Deployment Name</b>	The name of the Deployment this Process Definition belongs to.
<b>Key</b>	The Key of this Process Definition. The Key is the original id given to the process in the BPMN editor it was created in.
<b>Created</b>	The date and time the Process Definition was created.
<b>Owner</b>	The User that owns this Process Definition. Click the owner's name link to display the User Info screen.
<b>Diagram Resource Name</b>	The Deployment resource name of the thumbnail for this Process Definition.

<b>Resource Name</b>	The Deployment resource name of the BPMN XML file for this Process Definition.
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## Process Diagram

This is a thumbnail of the diagram representing the BPMN logic for this Process Definition.

## All Workflow Process Definitions

**Navigation:** [[DocMgr](#) > [Workflows](#) > [Side Menu](#) > [Process Definitions](#) > [Side Menu](#) > [All Process Definitions](#)]


All Workflow Process Definitions displays all the Process Definitions that have been created in the Document Manager. Note: Only a User with the Workflows Manager or Admin privilege can show All Process Definitions.

- The Name, Process Definition ID, Key, and Version are displayed for each Process Definition.
- The number of Process Definitions is shown.
- Click on  to Show Info for the specific Process Definition.

## My Workflow Process Definitions

**Navigation:** [[DocMgr](#) > [Workflows](#) > [Side Menu](#) > [Process Definitions](#) > [Side Menu](#) > [My Process Definitions](#)]


My Workflow Process Definitions displays all the Process Definitions that you currently own in the Document Manager.

- The Name, Process Definition ID, Key, and Version are displayed for each Process Definition.
- The number of Process Definitions is shown.
- Click on  to Show Info for the specific Process Definition.

## Process Definitions in Deployment

**Navigation:** [[DocMgr](#) > [Workflows](#) > [Side Menu](#) > [Deployments](#) > [Select Desired Deployment](#) > [Side Menu](#) > [Process Definitions](#)]

Process Definitions in Deployment displays all the Process Definitions in the selected Deployment.

- The Name, Process Definition ID, Key, and Version are displayed for each Process Definition.
- The number of Process Definitions is shown.
- Click on  to Show Info for the specific Process Definition.

### 4.30.6. Showing a Workflow Process Instance

Displays Workflow Process Instances in the Document Manager

#### ***A Specific Workflow Process Instance***

**Navigation:** [*DocMgr > Workflows > Side Menu > Process Instances > Select Desired Process Instance*]

The User must have read access to the Workflow Process Instance.

Field Name	Description
<b>Name</b>	The Name of the Process Definition this Process Instance started from.
<b>Process Instance ID</b>	The ID used by the Workflow engine to uniquely identify this Process Instance.
<b>Process Definition ID</b>	The ID used by the Workflow engine to uniquely identify the Process Definition this Instance belongs to.
<b>Ended</b>	The date and time the Process Instance ended.
<b>Suspended</b>	Whether or not Process Instance is suspended.

#### Process Diagram


This is a thumbnail of the diagram representing the BPMN logic for this Process Instance. The activity circled in red indicates the currently running activity.

#### All Workflow Process Instances

**Navigation:** [*DocMgr > Workflows > Side Menu > Process Instances > Side Menu > All Process Instances*]

All Workflow Process Instances displays all the Process Instances in the Document Manager.

Note: Only a User with the Workflows Manager or Admin privilege can show All Process Instances.


- The Name, Process Instance ID, Process Definition ID, Suspended, and Ended, values are displayed for each Process Instance.
- The number of Process Instances is shown.
- Click on  to Show Info for the specific Process Instance.



#### All Workflow Process Instances that I Started

**Navigation:** [DocMgr > Workflows > Side Menu > Process Instances > Side Menu > My Process Instances]


All Workflow Process Instances that I Started displays all the Process Instances in the Document Manager that you started.

- The Name, Process Instance ID, Process Definition ID, Suspended, and Ended, values are displayed for each Process Instance.
- The number of Process Instances is shown.
- Click on  to Show Info for the specific Process Instance.

#### Process Instances of Definition

**Navigation:** [DocMgr > Workflows > Side Menu > Process Definitions > Select Desired Process Definition > Side Menu > Process Instances]

Process Instances of Definition displays all the Process Instances in the Document Manager of the selected Process Definition.

- The Name, Process Instance ID, Process Definition ID, Suspended, and Ended, values are displayed for each Process Instance.
- The number of Process Instances is shown.
- Click on  to Show Info for the specific Process Instance.

### 4.30.7. Showing Workflow Activity

Show Workflow Activity provides a way to view the BPMN specific information for an individual Workflow activity that is part of a Workflow process. The information displayed will vary based on the type of activity being displayed.

- The User must have the Workflows privilege with Read access to the Workflow process.

**Navigation:** [DocMgr > Workflows > Side Menu > Show Process Instances > Select Desired Process > Click on the Activity to Display]

#### Step 1:

The information shown for a Workflow activity will vary depending on the type of activity being displayed. All activities do have an ID, Name, Type, and Documentation field, and most activities will have one or more incoming and outgoing sequence flows. The information displayed will directly correlate to the information displayed when viewing the activity in the BPMN Editor. The ID shown is the ID that uniquely identifies an activity in a Workflow process. Any reference to this activity by other activities or connecting sequence flows will refer to this activity using its ID.

### 4.30.8. Starting a Workflow Process Instance

Start Workflow Process Instance is used to start a Process in the Document Manager. A Process can be started from a Process Definition or started manually on a Document or Generation.

- The User must have read access to the Process Definition.

#### ***Starting a Process from Process Definition***

**Navigation:** *[DocMgr > Workflows > Side Menu > Process Definitions > Select Desired Process Definition > Side Menu > Start Instance]*

When starting a Process Instance directly from a Process Definition, you will be redirected back to the Process Definition unless the Process Definition requires you to complete a starting form. Starting forms are used in a Process to take in and set initial data for the Process. If a form is displayed, follow the steps below.

1. Follow any instructions displayed for this starting form.
2. Complete each field of the starting form that is required.
3. Click the Cancel button to cancel the command, or click the OK button to start the Process.

Notes:

- An instance of the Workflow Process will be started on the Workflow Engine.

Starting a Process on a Document or Generation

**Navigation:** *[DocMgr > Explorer > Select Desired Document or Generation > Side Menu > Start Process]*

When starting a Process on a Document or Generation, the Document and/or Generation will be passed into the Process. All subsequent commands in the Process will target that Document and/or Generation.

- The User must have read access to the Document or Generation.

All of the available Processes to start are displayed.

1. Select a Process to start in the Process Trigger box by clicking the down arrow and choosing a Process Trigger from the list. The Process set in the Process Trigger selected will be the Process that is started. Only Process Triggers that have their Command set to "Start Process" can be started manually.
2. Enter the reason for starting the Process in the Reason box. Reason is a required field. The maximum length of this field is 255 characters.

3. Click the Cancel button to cancel the command, or click the OK button to start the Process.

Notes:

- An instance of the Workflow Process will be started on the Workflow Engine.
- A history record will be generated for starting the Workflow Process.

#### 4.30.9. Activating a Workflow Process Instance

Activate Workflow Process Instance is used to wake up a Process Instance that has been previously suspended by a User. This is sometimes useful because it allows you to stop and start a process. For example, if a Process Instance looks as though it might time out because of a timer task waiting on another condition (like a Document to be created) and you know the condition will be met shortly, you can suspend the Process Instance and then re-activate it afterwards so that you don't have to restart the entire Process over again.

#### 4.30.10. Suspending a Workflow Process Instance

Suspend Workflow Process Instance is used to pause the execution of a Process Instance. This is sometimes useful because it allows you to stop and start a process. For example, if a Process Instance looks as though it might time out because of a timer task waiting on another condition (like a Document to be created) and you know the condition will be met shortly, you can suspend the Process Instance and then re-activate it afterwards so that you don't have to restart the entire Process over again.

#### 4.30.11. Deleting a Workflow Process Instance

Delete Workflow Process Instance deletes an existing Workflow Process Instance in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have Owner access to the Workflow Process Instance.

**Navigation:** [*DocMgr > Workflows > Side Menu > Process Instances > Select Desired Process Instance > Side Menu > Delete*]

##### **Step 1:**

The Process Instance to be deleted and the Process Instance attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

##### **Step 2:**

The Process Instance to be deleted and the Process Instance attributes are displayed.

1. Enter the reason for deleting the Process Instance in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Workflow Process Instance.

Notes:

- The Workflow Process Instance will be deleted from the Workflow engine.
- A history record will be generated for deletion of the Workflow Process Instance.

#### 4.30.12. Modifying Workflow Process Instance Variables

Modify Workflow Process Instance Variables allows the variables of a workflow process instance to be modified. Existing variables can be edited or removed and new variables can be added. This ability can be very handy for a process instance that has become stuck because of a business process change, design issue, etc.

Notes:

Before the variables of a workflow process instance can be modified, the instance must first be suspended.

After modifying the variables of a process instance, the instance will be activated again just before the variable changes are saved.

- The user must have the Workflows, Workflows Manager or Admin privilege.
- The user must have Owner access to the process.

**Navigation:** [*DocMgr > Workflows > Side Menu > Show... > Process Instances > Select Desired Process Instance > Side Menu > Modify Variables*]

##### **Step 1:**

A message is displayed that details the importance of understanding the process instance's design before any attempt at modification is made. Due to the complex nature of workflow, a single error in the adjustment, creation or removal of a variable can cause the entire process to terminate on error and become unrecoverable.

1. Click the Cancel button to cancel the command, click the Next button to continue.

Step 2:

The current process instance variables and their values are displayed. All the variables can be modified or removed with the exception of current user (if applicable). Like all other areas in TechDoc the owner or current user of an object can only be modified by an Admin and if a current user variable does exist on a process instance, it cannot be removed by anyone including an Admin. Additionally, if a current user variable does not exist on a process instance, one can be added. However, keep in mind once added it cannot be removed. New variables can be added by selecting a type from the drop down, entering a name for the variable next to the drop down and finally clicking the Add button.

1. Edit the values of any variables needed.
2. Remove any variables if needed.
3. Add any new variables needed.
4. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the Next button to continue.

Step 3:

1. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the Next button to continue.

Step 4:

1. Enter the reason for the modification of workflow process instance variables in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to go back to the previous screen, or click the OK button to perform the modification.

Notes:

- The workflow process instance will be activated.
- The variables changes will be made to the workflow process instance.
- Two history records will be generated. The first record will be created for the activation of the workflow process instance. The second record will detail all of the variable changes made on the workflow process instance.

#### **4.30.13. Creating a Workflow Process Trigger**

Create Workflow Process Trigger creates a new Process Trigger in the Document Manager. A Process Trigger is used to trigger the start of a selected Workflow Process after a command is executed and a preset condition is met by the specified Document attributes or Keywords. For example, if you were to create a Process Trigger that specified a Workflow Process Definition named "MyFirstWorkflowProcess", the command "Create Document", and the Document Category "NS - Non-Sensitive Information", anytime a Document is created with the Document Category "NS - Non-Sensitive Information" a new instance of the "MyFirstWorkflowProcess"

Process is started. When starting the instance, the Document that triggered the process becomes the "selected" document that all subsequent actions in the process will target (i.e. reserve document, release document, add keyword etc.). Therefore, when designing a Process that will be triggered by a Document, it is unnecessary to "select" the Document to work with in the Process as this will be done for you when the Process is triggered.

- The user must have the Workflows Manager or Admin privilege.

**Navigation:** *[DocMgr > Workflows > Side Menu > Create Process Trigger]*

**Step 1:**

1. Enter the Name for the Process Trigger in the Name box. The Process Trigger Name must be unique within the same Document Manager. The maximum length of this field is 255 characters.
2. Select the Process Trigger owner in the Owner box by clicking on the down arrow and selecting a name from the list.

Note: Only an Admin can select the owner of a Process Trigger.

3. Select the command this Process Trigger should act upon in the Command box by clicking on the down arrow and selecting a command from the list.
4. Select a Process Definition in either the Process Definition ID or Process Definition Key drop down. You may select either one or the other, not both. A Process Definition has both an ID and Key. The ID is unique and can belong to only one version of one Process Definition whereas the Key is not unique and is used to identify all versions of a Process Definition. Each time a Process Definition is updated, a newer version is created. If you select a Process Definition by ID, it is guaranteed that that specific Process Definition will always be used even if a newer version is uploaded. If you select a Process Definition by Key, it is guaranteed that the latest version of a Process Definition will be used.
5. Enter reason for creating the Workflow Process Trigger in the Reason box. This is a required field. The maximum length of this field is 255 characters.
6. If the command is not "Start Process", additional criteria may be added to the trigger to further limit which documents will cause the trigger to fire. If an additional criterion is desired, select a Document attribute or Keyword from either the New Doc Attribute or New Doc Keyword box, click the Add button, and enter or select the value for the new criterion that was just added.

"Start Process" does not allow any additional criteria. All other commands can optionally have one or more additional criteria.

7. Click the Cancel button to cancel the command, or click the OK button to create the Workflow Process Trigger.

Notes:

- A new Workflow Process Trigger record will be created.
- A history record will be generated for the creation of the Workflow Process Trigger.

#### 4.30.14. Modifying a Workflow Process Trigger

Modify Workflow Process Trigger modifies an existing Process Trigger in the Document Manager. A Process Trigger is used to trigger the start of a selected Workflow Process after a command is executed and a preset condition is met by the specified Document attributes or Keywords. For example, if you were to create a Process Trigger that specified a Workflow Process Definition named "MyFirstWorkflowProcess", the command "Create Document", and the Document Category "NS - Non-Sensitive Information", anytime a Document is created with the Document Category "NS - Non-Sensitive Information" a new instance of the "MyFirstWorkflowProcess" Process is started. When starting the instance, the Document that triggered the process becomes the "selected" document that all subsequent actions in the process will target (i.e. reserve document, release document, add keyword etc.). Therefore, when designing a Process that will be triggered by a Document, it is unnecessary to "select" the Document to work with in the Process as this will be done for you when the Process is triggered.

- The user must have the Workflows Manager, or Admin privilege.

**Navigation:** [[DocMgr](#) > [Workflows](#) > [Side Menu](#) > [Process Triggers](#) > [Select Desired Process Trigger](#) > [Side Menu](#) > [Modify](#)]

##### Step 1:

1. If applicable, modify the Name for the Process Trigger in the Name box. The Process Trigger Name must be unique within the same Document Manager. The maximum length of this field is 255 characters.
2. Select the Process Trigger owner in the Owner box by clicking on the down arrow and selecting a name from the list.

Note: Only an Admin can select the owner of a Process Trigger.

3. If applicable, modify the command this Process Trigger should act upon in the Command box by clicking on the down arrow and selecting a command from the list.
4. If applicable, modify the Process this Process Trigger should start by selecting a Process Definition in either the Process Definition ID or Process Definition Key drop down. You may select either one or the other, not both. A Process Definition has both an ID and Key. The ID is unique and can belong to only one version of one Process Definition whereas the Key is not unique and is used to identify all versions of a Process Definition. Each time a Process Definition is updated, a newer version is created. If you select a Process Definition by ID, it is guaranteed that that specific Process Definition will always

be used even if a newer version is uploaded. If you select a Process Definition by Key, it is guaranteed that the latest version of a Process Definition will be used.

5. Enter reason for modifying the Workflow Process Trigger in the Reason box. This is a required field. The maximum length of this field is 255 characters.
6. If applicable, modify the Document attributes and/or Keywords used as additional criteria to determine which documents will cause this Process Trigger to fire.

"Start Process" does not allow any additional criteria. All other commands can optionally have one or more additional criteria.

7. Click the Cancel button to cancel the command, or click the OK button to modify the Workflow Process Trigger.

Notes:

- The existing Workflow Process Trigger record will be modified.
- The existing Workflow Process Trigger attribute records will be modified.
- A history record will be generated for the modification of the Workflow Process Trigger.

#### 4.30.15. Deleting a Workflow Process Trigger

Delete Workflow Process Trigger deletes an existing Workflow Process Trigger in the Document Manager. Multiple steps are required during the process in order to minimize the chances of an accidental deletion.

- The User must have Owner access to the Workflow Process Trigger.

**Navigation:** [*DocMgr > Workflows > Side Menu > Process Triggers > Select Desired Process Trigger > Side Menu > Delete*]

##### **Step 1:**

The Process Trigger to be deleted and the Process Trigger attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

##### **Step 2:**

The Process Trigger to be deleted and any Process Trigger attributes are displayed.

1. Enter the reason for deleting the Process Trigger in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to delete the Workflow Process Trigger.



Notes:

- The Workflow Process Trigger record will be deleted.
- Any additional Workflow Process Trigger attribute records will be deleted.
- A history record will be generated for deletion of the Workflow Process Trigger.

#### 4.30.16. Showing a Workflow Process Trigger

Displays Workflow Process Triggers created in the Document Manager

##### *A Specific Workflow Process Trigger*

**Navigation:** [DocMgr > Workflows > Side Menu > Process Triggers > Select Desired Process Trigger]

The User must have read access to the Workflow Process Trigger.

Field Name	Description
<b>Name</b>	The name of this Process Trigger.
<b>Process Definition ID</b>	The ID used by the Workflow engine to uniquely identify the Process Definition of the Process this Trigger will start. When using an ID, it is guaranteed that that exact Process Definition will always be used. If a newer version is uploaded, this trigger will continue to use the older version you specified. This value will be empty if a Process Definition Key is used instead.
<b>Process Definition Key</b>	The Key used by the Workflow engine to identify the Process Definition of the Process this Trigger will start. When using a Key, the newest version of a Process Definition will be used. This means, after a trigger is created, every time a Process Definition is updated and a new version is created, this trigger will automatically begin use the new version in the future. This value will be empty if a Process Definition ID is used instead.
<b>Owner</b>	The User that owns this Process Trigger. Click the owner's name link to display the User Info screen.
<b>Created</b>	The date and time the Process Trigger was created.
<b>Command</b>	The command that this Process Trigger will act on.


Workflow Process Trigger Attributes

This section contains all of the attributes contained in this Process Trigger. The attribute Type, Name, and Value will be displayed for each attribute in the Process Trigger.

All Workflow Process Triggers

**Navigation:** [DocMgr > Workflows > Side Menu > Process Triggers > Side Menu > All Process Triggers]


All Workflow Process Triggers displays all the Process Triggers that have been created in the Document Manager. Note: Only a User with the Workflows Manager or Admin privilege can show All Process Triggers.

- The Name and Process Definition ID are displayed for each Process Trigger.
- The number of Process Triggers is shown.
- Click on  to Show Info for the specific Process Trigger.

My Workflow Process Triggers

**Navigation:** [DocMgr > Workflows > Side Menu > Process Triggers > Side Menu > My Process Triggers]

My Workflow Process Triggers displays all the Process Triggers that you currently own in the Document Manager.

- The Name and Process Definition ID are displayed for each Process Trigger.
- The number of Process Triggers is shown.
- Click on  to Show Info for the specific Process Trigger.

#### 4.30.17. Showing a Workflow Task

Displays Workflow Tasks in the Document Manager

##### ***A Specific Workflow Task***

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Select Desired Task]

The User must have read access to the Workflow Task.


Field Name	Description
Task ID	The ID used by the Workflow engine to uniquely identify this Task.
Name	The name of this Task.
Description	The description of this Task. Typically, the description is a set of instructions on how to complete the Task.

<b>Process Instance ID</b>	The ID used by the Workflow engine to uniquely identify the Process Instance this Task belongs to.
<b>Process Definition ID</b>	The ID used by the Workflow engine to uniquely identify the Process Definition this Task belongs to.
<b>Assignee</b>	The User that is assigned to completed this task.
<b>Owner</b>	The User that owns this Task. Click the owner's name link to display the User Info screen.
<b>Created</b>	The date and time the Task was created.
<b>Due Date</b>	The date and time this Task must be completed.

### All Workflow Tasks

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Side Menu > All Tasks]


All Workflow Tasks displays all the Tasks in the Document Manager. Note: Only a User with the Workflows Manager or Admin privilege can show All Workflow Tasks.

- The Task ID, Task Name, and Description are displayed for each Task.
- The number of Tasks is shown.
- Click on  to Show Info for the specific Task.

### All Workflow Tasks that Need My Attention

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Side Menu > My Tasks]

All Workflow Tasks that Need My Attention displays all Tasks you are assigned in the Document Manager that need your attention.


- The Task ID, Task Name, and Description are displayed for each Task.
- The number of Tasks is shown.
- Click on  to Show Info for the specific Task.

### All Workflows Tasks that are Open to Claim

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Side Menu > Open Tasks]

All Workflows Tasks that are Open to Claim displays all Tasks in the Document Manager that are not yet assigned to a User and are open to claim.

- The Task ID, Task Name, and Description are displayed for each Task.
- The number of Tasks is shown.

- Click on  to Show Info for the specific Task.

#### 4.30.18. Completing a Workflow Task

Complete Workflow Task is used to complete a Task that you are assigned. Tasks are open-ended and can require you do just about anything before clicking to "complete" the Task. A Task can be a questionnaire you must complete, or be a set of instructions you must follow. A Task's instructions may require you to perform a task in another application, or manually perform an operation such as writing and sending an email, making a phone call to notify someone of something, physically take an envelope or package and mail it. A Task can instruct you to do just about anything.

- The User must be the assignee on the Task.

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Side Menu > My Tasks > Select Desired Task > Side Menu > Complete]

##### **Step 1:**

The Task to be completed is displayed. Read and follow any instructions displayed for the Task. Complete any form questions displayed. As soon as you are confident that you've completed the steps required to fulfill the request of the instructions, click the OK button.

1. Click the Cancel button to cancel the command, or click the OK button to complete this Task.

Notes:

- The Task will be completed and the Workflow Process will advance to the next activity.

#### 4.30.19. Claiming a Workflow Task

Claim Workflow Task is used to claim an open Task that you are eligible to claim.

- The User must be a potential owner or be a member of a potential Group.

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Side Menu > Open Tasks > Select Desired Task > Side Menu > Claim]

##### **Step 1:**

The Task to be claimed and the Task attributes are displayed.

1. Click the Cancel button to cancel the command, or click the Next button to continue.

**Step 2:**

The Task to be claimed and the Task attributes are displayed.

1. Enter the reason for claiming the Task in the Reason box. This is a required field. The maximum length of this field is 255 characters.
2. Click the Cancel button to cancel the command, click the Previous button to return to the previous screen, or click the OK button to claim the Workflow Task.

**Notes:**

- The Workflow Task will be assigned to you.

**4.30.20. Assigning a Workflow Task**

Assign Workflow Task is used to assign a Task to a User.

- The User must have the Workflows Manager or Admin privilege.

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Side Menu > All Tasks > Select Desired Task > Side Menu > Assign]

**Step 1:**

The Task to be assigned is displayed.

1. Select an Assignee by clicking on the down arrow and selecting a name from the list.
2. Click the Cancel button to cancel the command, or click the OK button to assign this Task.

**Notes:**

- The Task will be assigned to the User selected.

**4.30.21. Unassigning a Workflow Task**

Unassign Workflow Task is used to unassign a Task.

- The User must have the Workflows Manager or Admin privilege.

**Navigation:** [DocMgr > Workflows > Side Menu > Tasks > Side Menu > All Tasks > Select Desired Task > Side Menu > Unassign]

**Step 1:**

The Task to be unassigned is displayed.

1. Click the Cancel button to cancel the command, or click the OK button to unassign this Task.

Notes:

- The Task will be unassigned.