TRIDOC

version 2.0

standard

TriDoc - Easy document management

HELP

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1. About TriDoc Standard

TriDoc is a high-class document management system for small and medium businesses. Let effective and easy document handling become reality at your company.

With the introduction of TriDoc Easy document management your company's document filing and managing procedures become standardized. Effectiveness of document handling increases by the automation of your processes, and as a result, the amount of work can significantly be decreased.

TriDoc standard product contains 5 licences. As the maximum number of user licences is unlimited, you may increase the licences by purchasing additional licence packs of 5 user licences each. For enterprise customers we recommend our TriDoc enterprise custom-tailored solution, which we implement on an individual basis.

2. Installation

2.1. Minimal system requirements

2.1.1. System requirements for Windows operating systems

The system's hardware performance, like for any other server applications, depends on the planned number of users and the amount of documents to be stored.

We recommend that you configure your hardware based on below information!

Recommended system configuration for installations above 20 users:

- Windows server
- Intel Xeon Quad-Core
- 3 GHz CPU
- 8 GB RAM
- 1 TB RAID 5 Storage
- Gigabit Ethernet

Minimum requirements:

- Windows XP, Vista, Windows 7
- 2 GHz CPU
- 2 GB RAM
- 200 GB HDD

Important! - *An internet connection is needed to activate the product!*

2.1.2. System requirements for Linux operating systems

The system's hardware performance, like for any other server applications, depends on the planned number of users and the amount of documents to be stored.

We recommend that you configure your hardware based on below information!

Linux OS recommended system configuration for installations above 20 users:

- Intel Xeon Quad-Core
- 3 GHz CPU
- 8 GB RAM
- 1 TB RAID 5 Storage
- Gigabit Ethernet

Linux OS minimum requirements:

- 2 GHZ CPU
- 2 GB RAM
- 200GB HDD

***Important! -** An internet connection is needed to activate the product!*

2.1.3. System requirements for Mac OS X operating systems

The system's hardware performance, like for any other server applications, depends on the planned number of users and the amount of documents to be stored.

We recommend that you configure your hardware based on below information!

Recommended system configuration for installations above 20 users:

- MAC OS X 10.4 or higher release version
- Intel Xeon Quad-Core
- 2,66 GHz CPU
- 8 GB RAM
- 1 TB RAID 5 Storage
- Gigabit Ethernet

Minimum requirements:

- MAC OS X 10.4 or higher release version
- 2 GHZ CPU
- 2 GB RAM
- 200GB HDD

***Important! -** An internet connection is needed to activate the product!*

2.2. Installation on Windows operating systems

Applications to be installed

- Database server: MySQL 5.0. Database server
- Application server: Apache Tomcat 5.5 Application server
- TriDoc standard 2.0.24

Before you begin, close all applications, including your web browser. If you're installing TriDoc Easy document management, make sure you have administrative privileges or can validate as an administrator.

1. Insert the TriDoc standard 2.0 install DVD into your DVD drive.
2. Double-click Setup_TriDoc_2_0_R24.exe (Windows) to begin the installation.

   Note: Depending on your autoplay settings in Windows, the Set-up.exe file may launch automatically.
3. Follow the onscreen instructions to install TriDoc standard 2.0!

   Note: You may be asked to close conflicting processes in order to complete the installation.
4. Press the **Register and finalize** button!

Please note that the installation process includes more installations (Apache Tomcat, MySQL, Java) hence, the process may take several minutes.

2.3. Installation on Linux operating systems

Applications to be installed

- Database server: MySQL 5.0. Database server
- Application server: Apache Tomcat 5.5 Application server
- TriDoc standard 2.0.24

2.3.1. MySQL installation

Installation can be done with the built-in Debian-based package manager. (In case of other Linux distributions please, follow the relevant instructions.)

```
apt-get install mysql-server
```

1/1. Start MySQL Server:

- To start MySQL using the preference pane: /etc/init.d/mysql start
- To stop MySQL using the preference pane: /etc/init.d/mysql stop

1/2. Open Terminal application and create the TriDoc database:

- Execute the following command in Terminal to get a MySQL prompt:

```
mysql --user=root mysql
```

- Execute the following statements in the MySQL prompt to create a user and a database:

```
CREATE USER 'tridoc'@'localhost' IDENTIFIED BY 'changeit';

GRANT USAGE ON * . * TO 'tridoc'@'localhost' IDENTIFIED BY 'changeit' WITH MAX_QUERIES_PER_HOUR 0 MAX_CONNECTIONS_PER_HOUR 0 MAX_UPDATES_PER_HOUR 0 MAX_USER_CONNECTIONS 0;
```

```
CREATE DATABASE IF NOT EXISTS `tridoc` DEFAULT CHARACTER SET utf8
COLLATE utf8_unicode_ci;

GRANT ALL PRIVILEGES ON `tridoc` . * TO 'tridoc'@'localhost';
```

2.3.2. Apache Tomcat installation

Apache Tomcat (or Jakarta Tomcat or simply Tomcat) is an open source servlet container developed by the Apache Software Foundation (ASF). Tomcat implements the Java Servlet and the JavaServer Pages (JSP) specifications from Sun Microsystems, and provides a "pure Java" HTTP web server environment for Java code to run.

2/1. Download and install Sun JDK if needed:

```
apt-get install sun-java5-jdk
```

2/2. Download and install Apache Tomcat using the package manager:

```
apt-get install tomcat-5.5 tomcat-5.5-admin
```

2/3. Start Tomcat Server:

- To start Tomcat using the preference pane: /etc/init.d/tomcat start
- To stop Tomcat using the preference pane: /etc/init.d/tomcat stop

2.3.3. TriDoc installation

3/1. Insert the Trilobita TriDoc DVD into the optical drive.

3/2. Copy the contents of `tridoc-2.0-bin.zip`from the DVD to /var/lib/tomcat5.5/webapps.

3/3. Modify the content of `hibernate.cfg.xml` located in /var/lib/tomcat5.5/webapps/TriDoc/WEB-INF/classes as follows:

The information in the following bold tags written can be modified:

- TriDoc path:

```
<property name="hibernate.connection.url">
<![CDATA[jdbc:mysql://localhost/tridoc?useUnicode=yes&characterEncodi
ng=UTF-8]]>
</property>
```

- User name:

```
<property name="hibernate.connection.username">tridoc
</property>
```

- User password:

```
<property name="hibernate.connection.password">changeit
</property>
```

3/4. Start Apache Tomcat using the start_tomcat command created in step II.

3/5. Navigate your web browser to http://localhost:8080/TriDoc/ .

3/6. You need to have Flash Player 9.x or any newer version installed on your PC to access the

TriDoc system.

3/7. Follow the instructions on the screen.

2.4. Installation on Mac OS X operating systems

Applications to be installed

- Database server: MySQL 5.1.(42). Database server
- Application server: Apache Tomcat 6.0. (20) Application server
- TriDoc standard 2.0.24

2.4.1. MySQL installation

You can install MySQL on Mac OS X 10.3.x ("Panther") or newer using a Mac OS X binary package in PKG format instead of the binary tarball distribution. When installing from the package version, you should also install the MySQL Preference Pane, which will allow you to control the startup and execution of your MySQL server from System Preferences. When installing using the package installer, the files are installed into a directory within /usr/local matching the name of the installation version and platform.

1/1. Download MySQL 5.1 Mac OS X package from:

http://dev.mysql.com/downloads/mysql/5.1.html#macosx-dmg

1/2. Mount the DMG file (double click).

The package is located inside a disk image (.dmg) file that you first need to mount by double-clicking its icon in the Finder. It should then mount the image and display its contents.

1/3. Double-click on the MySQL installer package.

It will be named according to the version of MySQL you have downloaded.

1/4. Proceed the dialogs.

Follow the instructions on the screen.

1/5. Install the MySQL Startup Item:

- Double-click on the `MySQLStartItem.pkg` file to start the installation process.
- You will be presented with the Install MySQL Startup Item dialog. Click Continue to continue the installation process.
- A copy of the installation instructions and other important information relevant to this installation are display. Click Continue.
- Select the drive you want to use to install the MySQL Startup Item. The drive must have a valid, bootable, Mac OS X operating system installed. Click Continue.
- You will be asked to confirm the details of the installation. To change the drive on which the startup item is installed you can click either Go Back or Change Install Location.... To install the startup item, click Install.

- Once the installation has been completed successfully, you will be given an Install Succeeded message.
- The Startup Item for MySQL is installed into `/Library/StartupItems/MySQLCOM`.
  The Startup Item installation adds a variable `MYSQLCOM=-YES-` to the system configuration file `/etc/hostconfig`. If you want to disable the automatic startup of MySQL, simply change this variable to `MYSQLCOM=-NO-`.
- To automatically start the MySQL server when the system boots: Check the checkbox next to Automatically Start MySQL Server on Startup.

1/6. Install the MySQL Preference Pane.

The MySQL Package installer disk image also includes a custom MySQL Preference Pane that enables you to start, stop and control automated startup during boot of your MySQL installation.

- Double click on `MySQL.prefPane`. The MySQL System Preferences will open.
- If this is the first time you have installed the preference pane, you will be asked to confirm installation and whether you want to install the preference pane for all users, or only the current user. To install the preference pane for all users you will need administrator privileges. If necessary, you will be prompted for the username and password for a user with administrator privileges.
- If you already have the MySQL Preference Pane installed, you will be asked to confirm whether you want to overwrite the existing MySQL Preference Pane.
- Once the MySQL Preference Pane has been installed, you can control your MySQL server instance using the preference pane. To use the preference pane, open the System Preferences... from the Apple menu. Select the MySQL preference pane by clicking on the MySQL logo within the Other section of the preference panes list.

The MySQL Preference Pane shows the current status of the MySQL server, showing stopped (in red) if the server is not running and running (in green) if the server has already been started. The preference pane will also show the current setting for whether the MySQL server has been set to start up automatically.

1/7. Start MySQL Server:

- To start MySQL using the preference pane: Click Start MySQL Server. You may be prompted for the username and password of a user with administrator privileges to start the MySQL server.
- To stop MySQL using the preference pane: Click Stop MySQL Server. You may be prompted for the username and password of a user with administrator privileges to shutdown the MySQL server.
- To disable the automatic starting of the MySQL server when the system boots: Uncheck the checkbox next to Automatically Start MySQL Server on Startup. You can close the **System Preferences**… once you have completed your settings.

1/8. Open terminal application and create the TriDoc database:

- Execute the following command in Terminal to get a MySQL prompt:

```
/usr/local/mysql/bin/mysql --user=root mysql
```

- Execute the following statements in the MySQL prompt to create a user and a database:

```
CREATE USER 'tridoc'@'localhost' IDENTIFIED BY 'changeit';
```

```
GRANT USAGE ON * . * TO 'tridoc'@'localhost' IDENTIFIED BY 'changeit'
WITH MAX_QUERIES_PER_HOUR 0 MAX_CONNECTIONS_PER_HOUR 0
MAX_UPDATES_PER_HOUR 0 MAX_USER_CONNECTIONS 0;

CREATE DATABASE IF NOT EXISTS `tridoc` DEFAULT CHARACTER SET utf8
COLLATE utf8_unicode_ci;

GRANT ALL PRIVILEGES ON `tridoc` . * TO 'tridoc'@'localhost';
```

2.4.2. Apache Tomcat installation

Apache Tomcat (or Jakarta Tomcat or simply Tomcat) is an open source servlet container developed by the Apache Software Foundation (ASF). Tomcat implements the Java Servlet and the JavaServer Pages (JSP) specifications from Sun Microsystems, and provides a "pure Java" HTTP web server environment for Java code to run.

2/1. Download Apache Tomcat 6.0.

You need to download a core type of zip package from the binary distributions. Copy ZIP contents to /usr/local/

2/2. Copy ZIP contents to /usr/local/

2/3. Create start_tomcat command in `~/bin`

```
#!/bin/sh
CATALINA_HOME=/usr/local/apache-tomcat-6.0.20
JAVA_HOME=/usr
export CATALINA_HOME JAVA_HOME
$CATALINA_HOME/bin/startup.sh
```

2.4.3. TriDoc installation

3/1. Insert the Trilobita TriDoc DVD into the optical drive.

3/2. Copy the contents of `tridoc-2.0-bin.zip` from the DVD to /user/local/apache-tomcat-6.0.20/webapps.

3/3. Modify the content of hibernate.cfg.xml located in user/local/apache-tomcat-6.0.20/webapps/TriDoc/WEB-INF/classes as follows:

The information in the following bold tags written can be modified:

- TriDoc path:

```
<property name=”hibernate.connection.url”>
<![CDATA[jdbc:mysql://localhost/tridoc?useUnicode=yes&

characterEncoding=UTF-8]]>
</property>
```

- User name:

```
<property name=”hibernate.connection.username”>tridoc
</property>
```

- User password:

```
<property name="hibernate.connection.password">changeit
</property>
```

3/4. Start Apache Tomcat using the start_tomcat command created in step II.

3/5. Navigate your web browser to http://localhost:8080/TriDoc/ .

3/6. You need to have Flash Player 9.x or any newer version installed on your PC to access the TriDoc system.

3/7. Follow the instructions on the screen.

2.5. Initial operation of TriDoc

First start – Quick configuration

After installation, check the following:

- The MySQL service has started!
- The Tomcat service has started!
- TriDoc is available in browser application (Flash plug-in required)!

The TriDoc system then automatically detects that a new additional system has been installed and displays the Quick configuration wizard. Follow the instructions on the screen.

3. Before you start to use the system

This chapter is recommended to those who first meet the TriDoc standard 2.0 system!

Before you start using TriDoc standard read the information on the **Start Page** carefully and carry out the First steps.

Important! - *Please take time to develop your companies own documentation rules before you start to use the system! Depending on the complexity of the documentation rules the customisation of the system can cover modification of primary data fields, the use of custom languages or fields, or even the definition of individual document categories and types.*

3.1. Create users

Create the users of the system and define their authorisation roles!

1/1. During configuration after installation you created a user with administrator role. Login with this user name and password, and follow the following steps.

1/2. The main menu is in the horizontal lane at the top of the working area. To enter users select the following menu item: **Administration / Users**!

Important! - *The TriDoc system can be used by as many users as the licence keys purchased and uploaded contain.*

1/3. We can shorten the users' list displayed in the table with defining screening conditions at the top of the screen and pressing the button **Display**. This time there is only one user in the list, this user is You.

To add a new user click on **New** at the bottom of the screen. By clicking this button the input fields become empty, and are waiting for the new user's data.

1/4. Enter the new user's data. To be simple we will give only the obligatory fields marked by an asterisk! Select the user's language from the languages installed, and determine the type of the authentication and the user's authorisation role!

- Authentication should be **TRISSO (default)** which means that user identifications are done by the TriDoc system, LDAP is not used. Give the user name and the password.
- Access role should be *Default* now that provides the user with all rights, this can be limited later.

It is not obligatory but suggested to give the e-mail address since the TriDoc system will send notifications to the e-mail address given here!

1/5. After defining the obligatory fields, click on **Save** and the new user appears in the table above.

What does May log in as Administrator option mean?

There is a checkbox with **May log in as administrator** *label on the screen. It can happen that meanwhile setting we make a mistake and we are locked out of the system. In this case by clicking this checkbox, we can turn off the rights system and we can reach all functions after login. That is why it is important to give this option the system administrator.*

Concerning TriDoc menu items:

Upload licence key:
Administration / Licence management

Modify authorisation roles:
Administration / Function authorisations

Which document can one have access?:
Administration / Category authorisations

Which project document can one have access?:
Administration / Project authorisations

3.2. Check core data

Before starting to use the system check the default core data!

The core data are the values appearing in the combo box fields of the system. These as well as **Document type** or **Company profile** fields determine how to group data.

It is important that core data maintenance should be done by one person to avoid entering data in different ways.

Pleas check and modify the values of the core data set earlier in the system according to your company's needs!

2/1. To modify core data select the following menu item: **Business customisation / Core data**!

2/2. If the users will use the system, it is suggested to give the core data in several languages. Select the option at the top of the document if necessary.

E.g. My company uses the system in several languages (maximum 5 languages)

For translation the system offers only those languages which were selected at installation.

2/3. In a list at the side of the screen you can find those core data types whose values can be changed. By clicking an item of the list the values of the current core data type appear in the table on the right.

You can modify these if needed, add new ones or translate them into languages used. To verify modifications it is enough to press ENTER in the input field.

If a value such as a given document category is not used by you but there is a chance to be needed later, then do not delete it.

2/4. You can find a number in front of all core data. Their use is not obligatory, it is only suggested. Numbering can help you that the values appear in an order the most appropriate for you.

Important!* - *These core data can be expanded at any time during the system use!

2/5. Among the core data the two most important ones are document category and type. **Document category** and **Document type** are two independent options for data grouping.

Key role of the document categories

- The system automatically creates a menu item to all core data values of the document category below the second main menu item.
- We can define individual category authorisations to the document categories. We can determine who can see the documents of the given category, e.g. individual authorisation to the contracts and to the accounts.

Key role of document types

- The document types are important because approval workflow processes can be defined to these types.

Concerning TriDoc menu items:

Which document can one have access?:
Administration / Category authorisations

Define approval processes:
Document management / Approval processes

3.3. Input, import persons, companies

Enter your colleagues, partners, clients in the TriDoc system partner database!

The TriDoc system can register your clients, company and person. By registering the document we select which registered company or person it belongs to. That is why it is important to enter the necessary data of the company and the person before registering.

3/1. To modify company data select the following menu item: **Partner management / Company list**!

After installation your company name appears: "*This is your company, please rename it".* Select this and double click or click on **Display, modify company datasheet >>** button at the bottom of the screen.

3/2. Fill in the fields according to your company's data in the datasheet, then press **Save** at the bottom of the panel!

In **Other data** in the panel on the right you can enter among others your company's tax number, bank, account number and individual fields to be defined later.

3/3. Enter the colleagues of your company one by one by pressing **Add new person to this**

company >> button at the bottom of the datasheet. In **Person maintenance** menu you can enter all persons including those who are not users of the TriDoc system.

Contact between the persons and the users:

Registered persons and Registered users are independent because there can be a registered person who is not a user.

We recommend that you create an individual personal datasheet for each user, and then define which person belongs to the selected user. This way you can manage both of your own colleagues and clients in a uniform framework.

3/4. As a practice enter some partner companies, clients and their colleagues in a way described above. It is recommended to upload the whole partner database later!

Import partner data if necessary!

Partner integration *makes data input of companies and persons efficient and fast. You should put the data to be imported in MS Excel format defined earlier to import, the system provides template databases.*

Concerning TriDoc menu items:

Company list:
Partner management / Company list

Company maintenance:
Partner management / Company maintenance

Person list:
Partner management / Person list

Person maintenance:
Partner management / Person maintenance

Partner data import:
Partner management / Partner integration

3.4. Define approval processes

The TriDoc workflow module makes defining approval processes to your documents possible. By defining approval processes we can determine not only approval persons but also the approval order or the deadlines.

4/1. To give the approval processes select the following menu item: **Document management / Approval processes**!

4/2. The entered approval processes can be seen in the list on the left. This list is currently empty.

To enter a new process press **New** at the bottom of the panel on the right, then at the top of the panel select the document type to which you wish to define an approval process. The project combo box should be empty now. After that each every document of this type will follow the approval route set here.

4/3. On **Simple approval** label select the approval sample to be assigned to the document type!

Each document will follow an approval route assigned to its type at the moment of its registration.

When the assigned approval process is deleted after the registration of the document, it will not have an effect on the approval process started.

4/4. Enter the approver and determine the deadlines assigned to them!

4/5. After clicking **Save** the workflow created is now among the current approval processes.

Important! - *The approvers can have e-mail notification of every incoming approval task. It is necessary for this to have an e-mail address for each approver and to set SMTP server connection correctly in the* ***System settings*** *menu item.*

E-mail messages are sent in a format for optimal display on **iPhone** *and* **Blackberry** *mobile devices.*

Concerning TriDoc menu items:

Define approval processes:
Document management / Approval processes

Show My approval tasks:
Document management / My approval tasks

Where to approve?:
Document management / Approval tasks / Assessment
Document management / Document registration / Assessment
Document management / Document list / Group Assessment

E-mail sending settings:
Administration / System settings / SMTP ...

3.5. Register first document

Register your first document with the help of parameters set earlier or the default data in the system!

After setting the core data, the document registration is fast and simple. Basically there are four different possibilities for document registration:

1. Simply on **Dashboard**.
2. In **Document registration** menu item in details.
3. Directly from MS Word application, using of TriDoc Add-In.
4. Processing through registration channels e.g. e-mail registration.

We recommend trying the three most frequent ways of registration!

5/1. Quick registration on Dashboard

1. To quick document registration select the following menu item: **Document management / Dashboard / Quick registration panel**!
2. Give the short title of the document, then select **Category, Type, Registry, Responsible**, and upload the document file selected!
3. Press **Register without finalisation** and the document has been registered!

You can search for the registered document in the **Document management / Dashboard / Search here!** panel or in the **Document management / Document list** menu item. For a search type in the first letters of the short name and press ENTER!

5/2. Detailed registration in the Document registration menu item

1. To register a document, select the following menu item: **Document management / Document registration**! The document datasheet is in the upper half of the screen and it contains the core data of the document; at the bottom the document versions are on the left and the datasheet of the selected version is on the right. Several files may belong to one version.
2. Press **New** in the top panel! Now the fields become empty and are waiting for the data. Type the obligatory data of the document marked by an asterisk, and then press **Save** on the top panel!
3. Due to this the document datasheet is created and also the first 1.0.0 document version. Select and upload the files to be registered by pressing **Upload** button. Press **Save** on the bottom version panel to save the uploaded files!

Discover which data can also be stored on the various labels of the top document panel!

5/3. Task assignment on Dashboard

1. To assign tasks select the following menu item: **Document management / Dashboard / Task assignment panel**!
2. Give the short title of the document, then select **Category, Type, Registry book** and the **Responsible** is you, and describe the task! The project should be empty! Press **Task assignment**. You can see that the assigned task appears at the responsible person, so at you in the panel on the right in **My documents to be prepared** and **Tasks I have assigned** lists!
3. During task assignment the system automatically produced the datasheet of the document to be prepared but kept the file empty. It will be filled by the author of the document. In this case it is you.
4. Upload task results: After you have prepared the document according to the task, click on the task in question in the list **My documents to be prepared** on **Dashboard** on the right!
5. You can see that the **Dashboard** changes and the identification of the document selected by you appear in the place of quick registration in the new panel. You should select and upload the prepared file by pressing **Upload**, then register it by pressing

Register without finalisation.

What is the difference between Register and finalise and Register without finalising buttons?

If we register the document without finalising, then we have a chance to give further data later. If we finalise the document, then its data cannot be modified and the given approval workflow starts automatically.

Concerning TriDoc menu items:

Quick registration:
Document management / Dashboard / Quick registration

Detailed registration:
Document management / Document registration

Task assignment:
Document management / Dashboard / Task assignment

Show registered documents:
Document management / Dashboard / Search here!
Document management / Document list
Document management / Archive – search

E-mail sending settings:
Administration / System settings / SMTP ...

4. Activation of licence keys

4.1. Activation of licence keys over the internet

The licence key can be found in the DVD case of TriDoc. The licence key consists of 5*4 characters.

After installation the system contains a Trial licence limited to 5 documents, which is only sufficient for the trial of the system. The licence for the purchased product has to be entered manually, and then activated by pressing the **Upload license key**.

What happens after activation?

After activation the TriDoc system sends the licence key over the internet to the manufacturer's licence server, which – after investigation of authenticity – sends back a digitally signed licence file to the system. Once the digitally signed file has been activated, the number of users and documents corresponding to the licence can be handled.

What is included in the TriDoc standard licence?

With the basic TriDoc standard licence you can manage 5 users and 10,000 documents. If you need access for additional users, you can extend the licence simply by purchasing and activating additional licences. Such licences can also be basic licence packages or extension licences.

***Important! -** Concerning standard or document extension licences please, contact our reseller partners!*

Concerning TriDoc menu items:

Where can I upload the licence key?:
Administration / License management

4.2. Licence activation without internet connection

The licence key can be found in the DVD case of TriDoc. The licence key consists of 5*4 characters.

After installation the system contains a Trial licence limited to 5 documents, which is only sufficient for the trial of the system.

If your server does not have an internet connection, please, follow the following steps:

1. After installation of TriDoc select the following menu: **Administration / License management**.
2. Select the following option: **„I am using the license file downloaded from the www. tridoc.eu/licence page”.**
3. Write down the **„TriDoc server identification code”**. This code is unique and unambiguously identifies your server.

4. Find a notebook or PC with an internet connection. Take with you the TriDoc DVD case with the licence key, and the server identification code noted before.
5. Enter the following web site: http://www.tridoc.eu/licence
6. Enter the name of the licence owner, the licence key that can be found n the in the DVD case and the server identification code noted before.
7. Press the **Activate** button.
8. Download the appearing licence key to your USB pen drive.
9. Go back to the TriDoc server and upload the licence file from the USB pen drive in the same menu.
10. By pressing the **Upload license key** button activate the uploaded licence file.

What is included in the TriDoc standard licence?

With the basic TriDoc standard licence you can manage 5 users and 10,000 documents. If you need access for additional users, you can extend the licence simply by purchasing and activating additional licences. Such licences can also be basic licence packages or extension licences.

Important!* - *Concerning standard or document extension licences please, contact our reseller partners!

Concerning TriDoc menu items:

Where can I upload the licence key?:
Administration / License management

Where can I generate a licence file if I have no internet access?:
http://www.tridoc.eu/licence

4.3. What type of extension licences can be ordered?

You can order the following type of licences to the basic TriDoc standard system:

- **5 user extension licence (identical with the basic licence)**

  By uploading this extension licence key, additional 5 users will be authorized to access the system. The numbers of documents that can be handled remain unaffected.

- **100.000 document extension licence**

  By uploading this extension licence key, additional 100,000 documents can be handled in the system. The numbers of users that are authorized to access the system remain unaffected.

Important!* - *Concerning standard or document extension licences please, contact our reseller partners!

5. It is strongly recommended to read this section!

What are the features of TriDoc that you might be unfamiliar with?

This section is written for those users who prefer to learn the application on their own. In this section we have collected those unusual system features that we strongly recommend to look through!

5.1. The screens keep the text entered before

The user interface of TriDoc standard is based on RIA (Rich Internet Application) technology, which allows the different screens in the menus to preserve their content while you change screens.

Example:

The filtered and displayed list in the **Document List** menu will not change, if after filtering we go to the **Document registration** screen and save a new document.

Important! - *Use the* **Show** *button, if you would like to refresh the content of the list!*

5.2. Table columns can be resized and reorganized

Reports have been designed to fit the screen display in most cases.

Table columns can be resized as wanted or reorganized by using drag and drop. The columns keep the settings until you log out.

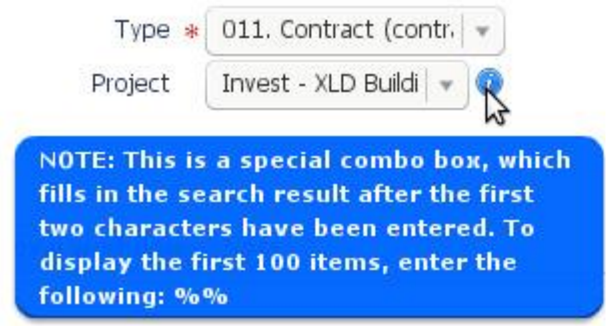
Short title	Title **Type**	Type
OFFER_BOC	Offer - Bank of China	0[illegible]. Offer (outg
INVOICE_Item:8	Invoice - Item: 8563 LG El	031. Invoice (ou
CONT_Elektric	Contract - electric system	014. Contract (fc
INVOICE_Item: {	Invoice - Item:8561 LG Ele	031. Invoice (ou

5.3. The company, person and project combo boxes only fill with content if you enter the first 2 characters

There are also combo boxes in the system that work differently from what you might be used to. These combo boxes do initially not contain values. To fill up the combo boxes with value content you have to enter the first 2 characters of the value item you are searching for. After filtering the system displays matching values.

Such combo boxes typically are:

- Company selecting combo box
- Person selecting combo box
- Project selecting combo box



What shall I do, if I do not know what characters the searched value starts with?

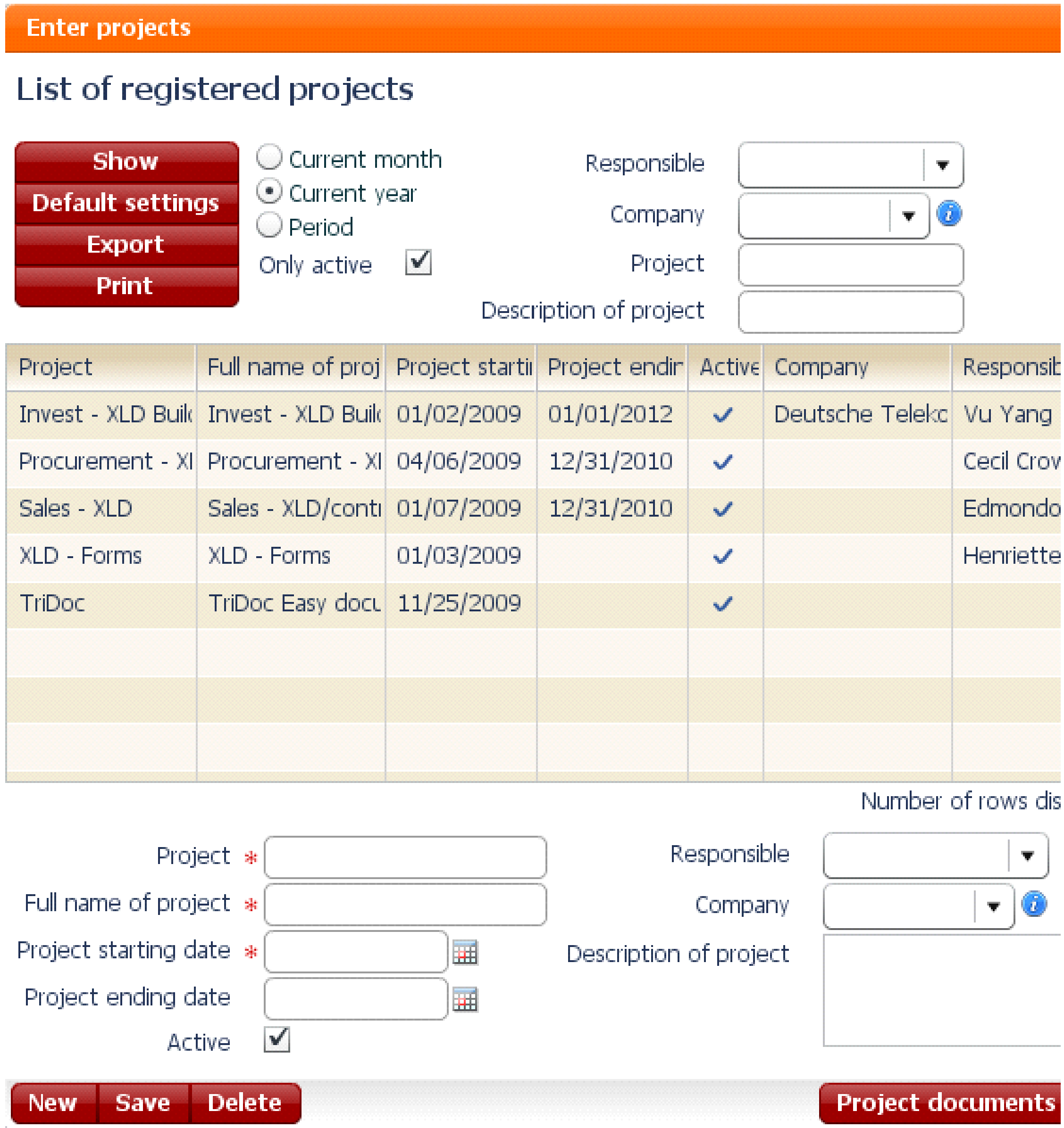
In this case you should use substitute characters, i.e. enter the following characters: **%%**. The first 100 value records will appear.

5.4. Normally filters appear on top of the tables

Displayed reports can be filtered in most cases. Filters appear on top of the tables.

Information! - *Fields on top of the lists only refer to the filter function of the corresponding list!*

Into the fields below a list you can enter new data!



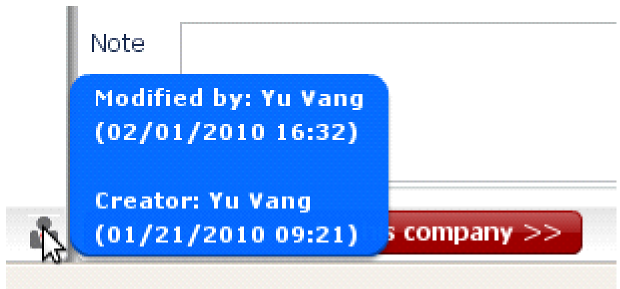
5.5. Before completing the form you need to press the New button!

Before saving a record you need to press the **New** button. If you omit this step you will overwrite the displayed record.

5.6. You want to see who has created and modified lastly the data record!

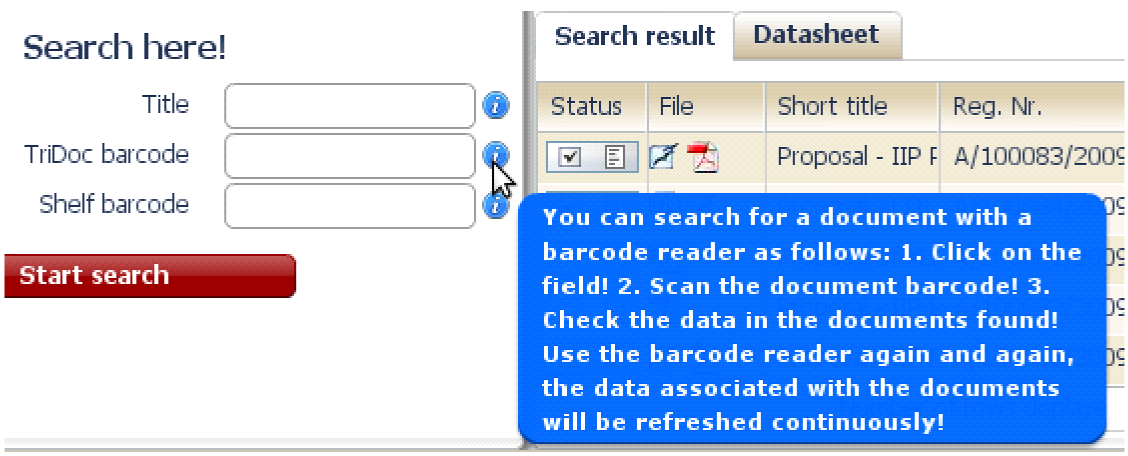
On the screen or panel where saving of data is possible, when you move the mouse over the icon in the lower right corner, then you will see a tooltip, which will display the following information:

- Name of person recording the data, date and time of recording.
- Name of person lastly modifying the data, date and time of modification.



5.7. It is recommended to read tooltips of Info icons

Info icons next to the data entry fields of the system indicate whether a tooltip is available for that specific field. If you move the mouse over the icon a short explanation will appear.



5.8. Understanding the most significant core data

5.8.1. Document category and its critical role

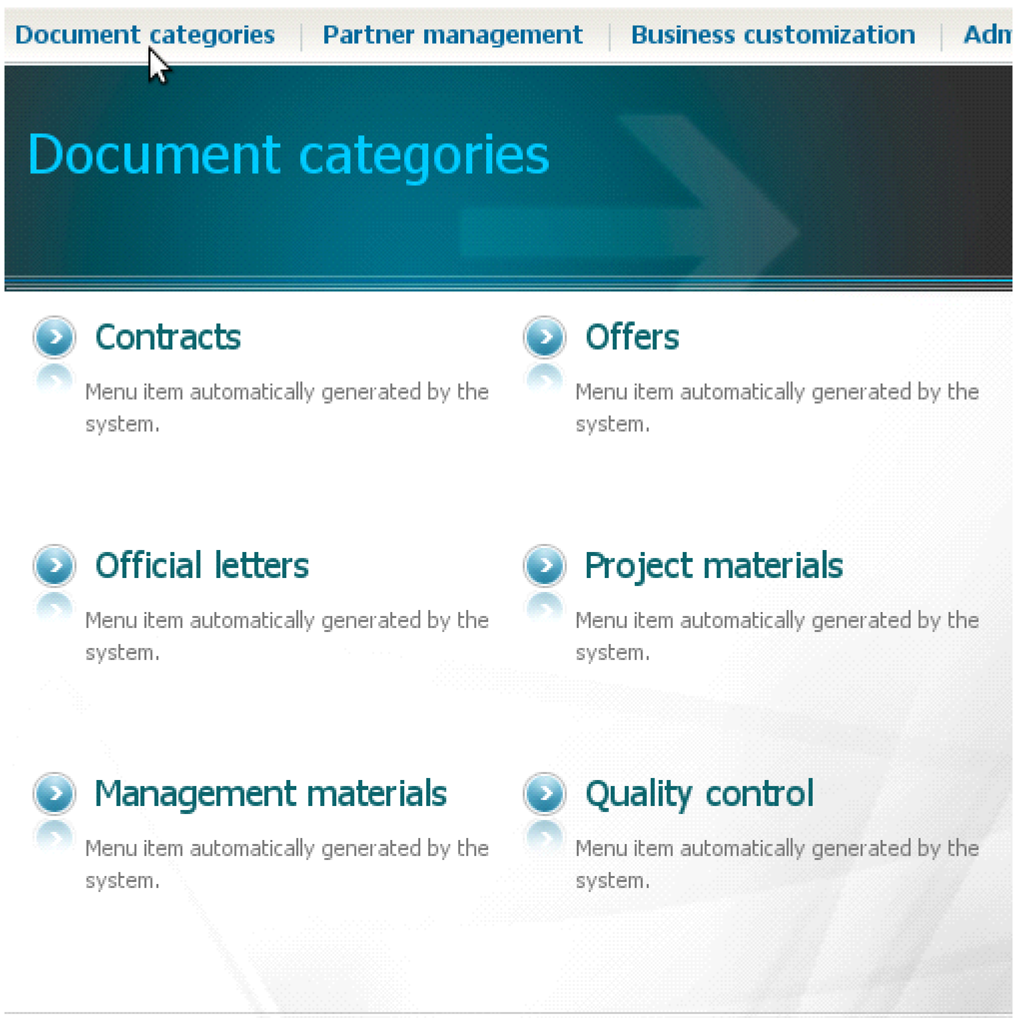
The document category is core data type that can be expanded later on. The document category is suitable to group documents at **high level**; its content type is not restricted and can be of various types depending on the use.

The document category has a critical role because of the **access rights** that can be associated with it.

Menu points consisting of the list of the various document categories are automatically inserted into the second main menu.

***Important!** - Do not forget to refresh the content of the browser each time you add or change a document category.*

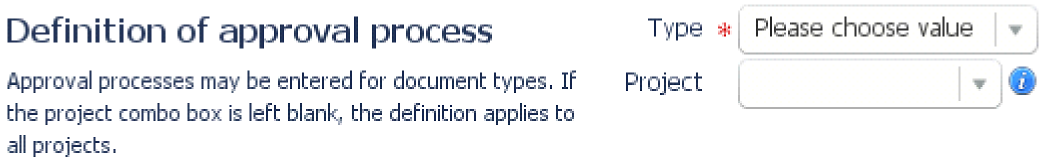
The menu will only change upon the refresh!



5.8.2. Document type and its critical role

The document type is core data type that can be expanded later on. The document type is suitable to group documents at **low level**; its content type is not restricted and can be of various types depending on the use.

The document category has a critical role because of the **approval workflow** that can be associated with it.



5.8.3. Registry book and its critical role

The registry book is a core data type that is recommended to be defined before the first use. Modification is possible later, however, we do not recommend effecting any changes.

The generation of the registry number of the document is influenced by the registry book. If you use only one registry book, the document will be registered with a sequential number. If you use various registry books, the documents registered will get separate sequential numbering.

TIP! *- Use registry books marked with one character (pl.: A, B, C.), as this will become part of the registry number.*

6. Understanding the notion of TriDoc document

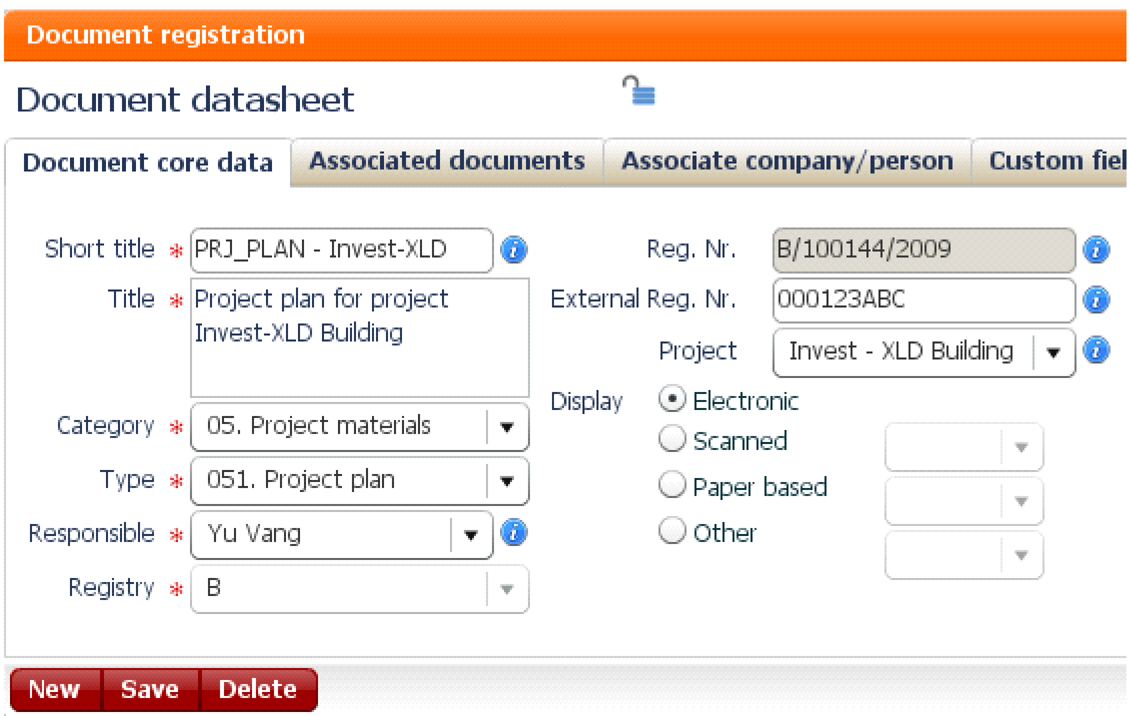
In order to get the most out of TriDoc standard and use it in the most effective way, you should fully understand the notion of document.

A document is a hierarchic data structure, which is made up of:

- Document sheet
- Version sheet
- Attached files

6.1. The document sheet contains the metadata

The document sheet includes all metadata saved during registration of the document, and all versions that are attached to the document sheet, which have been created during the lifecycle of the document.



6.2. A document may have different versions

A document has at least one version, but there might be several versions registered one after the other.

In the TriDoc standard system it is not permitted to modify already finalized document versions. The document version is saved in the status it had been saved in the moment of finalizing.

If a modification is needed a new version needs to be created.

All document versions contain attached documents and metadata. The metadata serves identification of the document version.

6.3. One or more files can be attached to one version

A document version does not necessarily contain an attached file, but it may also contain one or more files.

1st example

If you assign a document creation task, the system creates a document sheet and also the first version sheet. In the moment the document creation task is generated, there are no files attached to the version.

2nd example

If you want to attach to the version sheet of a contract both the scanned image file and also the original editable source file, then you will have 2 different files attached to this version sheet.

What type of files can be attached?

Basically, any type of file can be attached. Attached files are opened with the associated application.

Examples:

Format	Icon	Description
AVI		AVI File format (MS Word) AVI Graphics Format Overview FAQ
DOC		Microsoft Word 5.0 (PC) Binary File Format Microsoft Word 2 Format (RTF) Microsoft Word 2 Format (RTF) Microsoft Word 6.0 Binary File Format (as TXT file) Microsoft Word 6.0 Binary File Format (MS Word) Microsoft Word 8/Word 97 Format - more complete version (HTML FILE)
DOCX		Microsoft Word 2007 Format
FLA		Macormedia Flash (for productung)
FLV		Flash viedo (encoded to run in flash animation)
GIF		LZW and GIF explained
HTML		HTML 3.2 Specification (W3C approved) HTML 4 Specification (W3C approved) HTML 2.0 (RFC 1866 approved by IETF)
JPEG		Full JPEG standard (PDF version) JPEG Compression Standard (Acrobat) JPEG Compression and the JPEG file format & source code
JPG		Joint Photographic experts Grop
MP3		Mpeg 1.0/2.0 Layers I, II and III header and trailer formats
MP4		MPEG-4 Video File

ODF		ODIF - Open Document Interchange Format for Open Document Architecture (ODA)
ODG		Open Office Graphic File Format
ODT		Open Office Text document format
ODP		Open Office Presentation File Format
PDF		Adobe Portable Document Reference version 1.7 Portable Document Format Reference Manual Version 1.3 - March 11, 1999 (Acrobat) Adobe Portable Document Reference version 1.6
PPT		Microsoft Powerpoint Presentation Format
PPS		Microsoft Powerpoint Show Format
RAR		RAR version 2.02 RAR 2.00 Format
RTF		Rich Text File Format v1.5 (MS Word) Rich Text File Format v1.7 (MS Word) Rich Text File Format v1.8 Rich Text File Format v1.8 Word 97 Addendum (MS Word)
SWF		Macromedia Flash File Format (SWF) SWF File Format Specification
TXT		Tax Exchange Format
VSD		Microsoft Visio File Format
WMF		Windows Metafile Format Windows Metafile Format WMF/EMF/APM (html)
XLS		OpenOffice.org's Documentation of the Microsoft Excel File Format Versions 2, 3, 4, 5, 95, 97, 2000, XP, 2003 Microsoft Office 97 Excel file format Microsoft Excel File Format (version 2.1)

		Microsoft Excel File Format (versions 2, 3, 4, 5, 95, 97, 2000, XP)
XML		Extensible Markup Language (XML) 1.0
ZIP		ZIP File Format (1998) ZIP File Format Specification version 6.3.0 ZIP File Format Specification version 4.5

7. Register a document

7.1. A document can be registered in 4 different ways

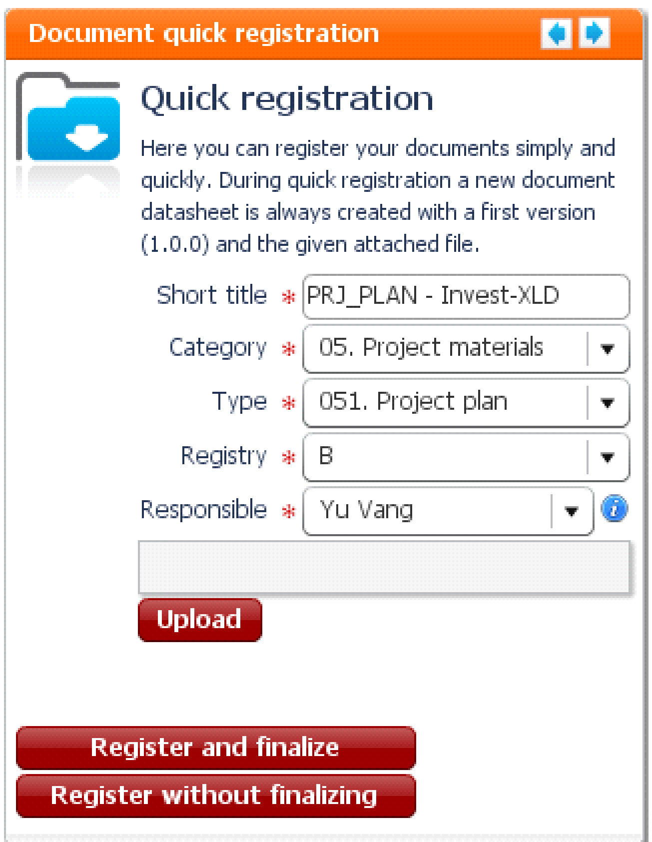
TriDoc offers the following 4 options for document registration:

- Quick registration of documents on the Dashboard >>
- Detailed registration on the Document registration screen >>
- Quick registration through the MS Word, MS Outlook Add-In >>
- Automatic registration through the use of automatic registration channels (e-mail, fax, scanner) >>

7.1.1. Quick registration of documents on the Dashboard

For the quick registration select the following menu: **Document management / Dashboard / Document quick registration** panel!

Enter the short title of the document, select its **Category, Type, Registry, Responsible**, and then upload the selected document file!



You will find the following 2 buttons on the bottom of the panel:

- **Register and finalize**
- **Register without finalizing**

The 2 buttons differ from each other basically in the function of the **Register and finalize** button, where after registration the document will automatically be set to finalized status and the approval workflow will be started according to the document type.

If we choose the **Register without finalizing** button, then, after registration you will be able to modify or add further metadata.

Concerning TriDoc menu items:

The registered document can be searched for in the below menu paths:

Document management / Dashboard / Search here!
Document management / Document list
Document management / Document history
Document management / Archive – search

7.1.2. Detailed registration on the Document registration screen

The detailed registration allows recording a lot more metadata than with the **Quick registration** on the **Dashboard**. With this function you can modify the metadata which has been recorded either on the **Dashboard** or even through automatic registration channels.

For document registration select the following menu: **Document management / Document registration**! The upper panel contains main data of the document sheet, the lower left panel contains a list of the document versions, and the lower right panel contains the version sheet. To one version you might attach one or more files.

Press the **New** button on the upper panel! The fields will be emptied and you can enter new data. Enter content of data fields that are marked with a red asterisk and press **Save** button on the upper panel!

As an effect, the document sheet will be created, and also the first 1.0.0 document version is generated. Select and upload the files to be registered by pressing the **Upload** button. Press the **Save** button on the lower version panel to save the uploaded files!

Discover what further data can be saved on the different tabs of the upper document panel!

If you require it you can use the barcode identification functionality of the TriDoc system! Stick a barcode label on each incoming paper-based document!

Concerning TriDoc menu items:

Registered documents can be searched for in the below menu paths:

Document management / Dashboard / Search here!
Document management / Document list
Document management / Document history
Document management / Archive – search

7.1.3. Quick registration through the Add-in in Ms Word and Ms Outlook

To use the MS Word and MS Outlook quick registration function you have to install MS Office and the TriDoc Add-in on all client machines, where you can TriDoc access from.

This Add-in can be downloaded from the **Business Customization / MS Office integration** menu. After installation in the main menu of MS Word the TriDoc menu will appear.

The TriDoc menu is made up of the following submenus:

- TriDoc Document Registration
- TriDoc Connection Settings
- TriDoc Help

In order to connect the MS Word application to the central TriDoc server, you first have to set the login name, password, and the URL address of the TriDoc application in the **TriDoc / TriDoc Connection Settings** menu. This data fully complies with the data you enter on the **Login** screen.

The type of metadata fields available in the MS Word Add-in fully comply with scope of metadata available in the quick registration panel of the **Dashboard** menu.

If you have installed and properly set up the MS Word Add-in, open Word document in the MS Word application, execute the necessary changes, and register it in the **TriDoc / Document Registration** menu.

The TriDoc Add-in gives you also the option to register a new version of an already registered document. In this case, you need to select from the combo box the registry number of the already registered document.

The MS Outlook Add-in works in exactly the same manner as the MS Word Add-in.

Concerning TriDoc menu items:

Registered documents can be searched for in the below menu paths:

Document management / Dashboard / Search here!
Document management / Document list
Document management / Document history
Document management / Archive – search

7.1.4. Automatic registration through the use of automatic registration channels (e-mail, fax, scanner)

The TriDoc automatic registration feature offers the function to create automatic registration channels between TriDoc and any optional equipment, which is capable of sending by e-mail a document for registration.

Automatic registration is generally used in following cases:

- E-mail server integration

- Fax server integration
- Scanner integration
- Integration of other bulk registration channel

How to use the automatic registration channels?

In the **Business Customization / E-mail, Fax integration** menu press the **New** button, enter the name of the registration channel (the name is user-definable), the login and password of the mailbox you want to connect to, and from which you want to download and automatically register the e-mails.

Important! - The data are critical for the connection to the mailbox, therefore, please, in all cases, consult your system administrator!

In the **Frequency of inquiry** combo box you can define TriDoc's frequency for e-mail downloads from that specific mail box.

Further options are:

Field name	Icon	Information
SSL		Use of secure network link.
Automatic clearing		After processing, the documents should be automatically deleted from the e-mail box.
Just the new once		On refreshing, the system only receives new e-mails.

Associate metadata to the registration channels:

For all automatic registration channels you need to define the metadata as mandatory also in case of quick registrations.

These are the following:

- **Short title**
- **Title**
- **Category**
- **Type**
- **Responsible**
- **Registry**

Optionally you may also define **Project** metadata. With the use of project metadata you may create different registration channels for your various projects. E-mails received in the created registration channel are automatically registered with the defined project.

The reports in the right panel of the screen show the defined registration channels.

In the list, in addition to the registration channel data, you will also find the following important information:

- **Last update**
- **Status**
- **Number of e-mails**
- **Processing time**.

*From the **Number of e-mails** and **Processing time** fields displayed in the list you can track how many e-mails have been processed during the last download, and how long processing took.*

If you want to operate several registration channels, do not forget that the automatic registration channels will cause a high work load for the TriDoc server. In such cases we strongly recommend to use high performance hardware equipment.

Concerning TriDoc menu items:

Registered documents can be searched for in the below menu paths:

Document management / Dashboard / Search here!
Document management / Document list
Document management / Document history
Document management / Archive – search

8. Listing and searching registered documents

Documents registered in the TriDoc system can be listed, and searched in the following menus:

- **Document management / Dashboard**
- **Document management / Document list**
- **Document management / Archive – Search**

8.1. Search function in the Dashboard

In the search panel of the **Dashboard** you can start a quick search for documents according to title, barcode and shelf barcode.

The search fields shall be used as follows:

Field name	Icon	Information
Title		TIP: This screening condition also searches in the long and short titles of documents. Use the symbol % if you wish to search for a word fragment, e.g.: %iPhone!
TriDoc barcode		You can search for a document with a barcode reader as follows: 1. Click on the field! 2. Scan the document barcode! 3. Check the data in the documents found! Use the barcode reader again and again; the data associated with the documents will be refreshed continuously!
Shelf barcode		If you have used barcodes to define the location of paper-based documents and have previously identified filing-cabinets and shelves with barcodes, then after the barcode for defining the location is scanned the documents found there are displayed.

The result of the search according to your search criteria will be displayed in the **Search result** panel. If your result has more than one match, you will see a list of results. Clicking on the file icon in the results list the saved files can be downloaded.

8.2. Search function in the Document list

In the **Document list** you get an overview of the document sheets recorded in the TriDoc system and complying with your set filter criteria.

To display the report first set filter criteria, then press the **Show** button. Before you start a new search, you may want to delete the previously set filter criteria by pressing the **Default settings** button.

If you click on the file icon in the displayed report you will directly download the saved file.

2 columns of the results list contain file icons. These are the followings:

- **Approved** – here you can see the files of the approved document version, if there are any.
- **New** – here you can see the newly added files of a document version, if there are any.

In the **Status** column of the table the valid status of the document is shown. The icons have the following meaning:

Field name	Icon	Information
Status		Under construction
Status		Under approval
Status		Approved
Status		Rejected

The **Check-in**, **check-out** column of the table (in the table there is no header label) shows, whether the document has been disabled for editing by any user.

Meaning of the icons:

Field name	Icon	Information
-		Editing, creation of new version permitted.
-		Editing, creation of new version disabled. You must wait for a version from the user who disabled editing of the document, and then it is possible for another user to create a new version.

Available filters are the following:

Field name	Icon	Information
Date	-	-
Title		TIP: This screening condition also searches in the long and short titles of documents. Use the symbol % if you wish to search for a word fragment, e.g.: %iPhone!
Responsible		The person responsible is the one who produces or administers the document.

Project		NOTE: This is a special combo box, which fills in the search result after the first two characters have been entered. To display the first 100 items, enter the following: %%
Reg. Nr.	-	-
Category	-	-
Type	-	-
Associate company		The contact company can be selected from the registered companies. For instance, this may be the company which sent the document. NOTE: This is a special combo box, which fills in the search result after the first two characters have been entered. To display the first 100 results, enter the following: %%
Associate person		The contact person can be selected from the registered persons. For instance, he may be the contact person with the company sending the given document. NOTE: This is a special combo box, which fills in the search result after the first two characters have been entered. To display the first 100 results, enter the following: %%
Status	-	-
Storage time expired		This screening condition will only display the documents for which the retention time has expired. The system calculates this from the latest document version.
Custom fields		Here you can display your custom fields defined in the Customize fields' menu item.

8.3. Search function in the Archive

On the **Archive - Search** screen you can list the document version sheets recorded in the TriDoc system and complying with your set filter criteria.

In contradiction to the **Document list** the **Archive - Search** also shows those documents that had previously been deleted logically.

To view the report, first set the search criteria and then press the **Show** button. Before you start a new search, you may want to delete the previously set filter criteria by pressing the **Default settings** button.

If you click on the file icon in the displayed report you will directly download the saved file.

In the **Status** column of the table the valid status of the document is shown. The icons have the following meaning:

Field name	Icon	Information
Status		Under construction
Status		Under approval
Status		Approved
Status		Finalized, approval not required
Status		Rejected
Status		Deleted in under construction status
Status		Deleted in under approval status
Status		Deleted in approved status
Status		Deleted in rejected status
Status		Deleted in finalized status
Status		Archived in under construction status
Status		Archived in under approval status
Status		Archived in approved status
Status		Archived in rejected status
Status		Archived in finalized status

Available filters are the following:

Field name	Icon	Information
Title		TIP: This screening condition also searches in the long and short titles of documents. Use the symbol % if you wish to search for a word fragment, e.g.: %iPhone !
Keyword	-	-
TriDoc barcode	-	-
Self barcode	-	-
Project		NOTE: This is a special combo box, which fills in the

		search result after the first two characters have been entered. To display the first 100 items, enter the following: %%
Category	-	-
Type	-	-
Registry	-	-
Registration location	-	-
Reg. Nr.	-	-
External Reg. Nr.		This external ID allows you to search in other systems, for instance also based on identification codes stored in SAP. TIP: You can also store identification codes here from the older system which has been replaced.
Responsible		The person responsible is the one who produces or administers the document.
Author	-	-
Associate company		The contact company can be selected from the registered companies. For instance, this may be the company which sent the document. NOTE: This is a special combo box, which fills in the search result after the first two characters have been entered. To display the first 100 results, enter the following: %%
Associate person		The contact person can be selected from the registered persons. For instance, he may be the contact person with the company sending the given document. NOTE: This is a special combo box, which fills in the search result after the first two characters have been entered. To display the first 100 results, enter the following: %%
Status	-	-
Approver	-	-
Logically deleted	-	-
Date of version	-	-
Version	-	-
Creator	-	-

Date of creator	-	-
Storage time expired	ⓘ	This screening condition will only display the documents for which the retention time has expired. The system calculates this from the latest document version.
Custom fields	ⓘ	Here you can display your custom fields defined in the Customize fields' menu item.

9. Register a new document version

We recommend the use of this feature if a document is already registered and a new version has been created, which you want to register again.

Similar to the registration of a document, you have several options depending on how many metadata you want to save.

Registration of a document version to an existing document:

- on the **Dashboard** menu
- on the **Document registration** menu
- through the MS Word or MS Outlook Add-In

9.1. Register a new version on the Dashboard

We recommend using this feature, when you wish to work on an assigned document creation task. In this case, the **Dashboard / Task list** contains the document creation task. This means, that the person assigning the creation task has already created the document sheet by creating the task, only the files have not yet been registered, as this has to be done by you.

How to register the new version?

1. Select in the task list of **Dashboard / Task list** panel the document sheet you are looking for. As a result the content of the **Dashboard's** first panel will change. Its title will change to: **Register task result – New version to existing datasheet**!
2. Select the file you want to upload (the work result of the assigned task) and execute the upload!
3. Press the **Register and finalize** button!

9.2. Register a new version on the Document sheet

We recommend using this feature, when the document version you have prepared already has an earlier document version.

How to register the new version?

1. Search for the document by filtering the document list and load the document sheet.
2. Press **New** button in the **Register document version** panel.
3. Fill in the metadata, browse and upload files of the new version.
4. Press the **Save** button.

9.3. Register a new version with the MS Outlook or MS Word Add-in

You can use this option only if the document you want to register a new version is included in the list of the last 100 registered documents.

How to register the new version?

1. Select the **Document registration** menu in the Add-in!
2. Select the following option: **Register task result – New version to existing datasheet!**
3. Select the registry number of the document from the combo box, you wish to register the new version to (only the last 100 registration numbers will appear here!)!
4. Select the files for upload!
5. Press the **Register and finalize** button!

10. Identifying documents with barcode labels

For easier identification you can provide your paper-based documents with barcode labels, where the TriDoc system stores the barcode ID number with the document version sheet. Barcode labels can be produced in advance by printing them out through the **Business customization / Print barcode** menu.

Pre-printed barcode labels (printed with another device)

TriDoc system also supports and accepts barcodes produced by another device. If required, use specialized barcode printers.

10.1. Printing pre-defined barcodes

You can print pre-defined barcodes in the **Business customization / Print barcode** menu. In general, this built-in feature is recommended to use for the printing of barcode labels on A4 format pages.

You can choose one of the following layouts:

*Niceday 13*5 (default)*

*Niceday 8*3*

*Niceday 10*4*

*Niceday 13*4*

*Niceday 16*5*

*Niceday 21*9*

The system remembers the lastly printed barcode number. Each time you want to print barcode labels the subsequent serial number will appear, which you can overwrite in the following field:

- **New initial serial number**

By pressing the **Start barcode print** button the printing process is started, so that the system generates PDF file containing the barcode labels. The printing can be finalized by printing the barcode labels from the Adobe Acrobat Reader application.

10.2. Provide incoming documents with barcode labels

The TriDoc system can also be used without barcode identification. However, to speed up document processing, it is efficient to provide incoming documents with barcode labels. To do so, you have to follow these steps:

Preparation:

- Generate barcode labels in the **Business Customisation / Print barcode** menu!
- Print out the barcodes on self-adhesive labels!
- Distribute the printed labels to the different reception points!

Use of barcodes:

- The person responsible for the receipt of documents should stick the next barcode label on all incoming paper-based documents!
- Optional step: As necessary you should execute pre-processing steps, meaning for example the scanning of paper-based documents, optical character recognition (OCR) or even spell-checking.

The person responsible for the registration of the documents should save metadata and the barcode by scanning the barcode ID on the label of the document!

10.3. Install a barcode during registration

Keep in mind that the use of barcodes is not mandatory. Please, define in your company documentation rules, in which cases or what document categories your colleagues have to use barcodes!

Primarily, there are two distinct reasons why TriDoc system uses barcode identification:

- TriDoc barcode – To quickly identify and retrieve your documents.
- Shelf barcode – To quickly identify the physical location of the document.

Recommended work process:

1. Generate barcode blocks with the individual labels!
2. Stick the label on the incoming documents after opening of your post mails!
3. If necessary do the pre-processing, scanning, character recognition, spell-check of the documents!
4. Register the document sheet and fill in the metadata!
5. Register the files to the document versions! These might be scanned, character recognition processed, editable files, documents, e.g. doc, pdf, etc.!
6. On the version sheet add the barcode of document (you can scan it, or enter the barcode serial number)!
7. On the version sheet add the physical location of the document, where the document will be kept once you have completed the registration!
8. Scan the shelf barcode (optional)!

10.4. Use of shelf barcodes

The shelf barcode is a barcode used to identify the physical location of the document. If used correctly, it will show you the current physical location of the document.

The TriDoc system stores the shelf barcode, which is used for search operations. For other operations the data is not relevant.

How to use the shelf barcode?

1. Generate shelf barcode blocks with the individual labels! We recommend that the format and number range of these shelf barcodes differ from the TriDoc barcode labels used for the identification of the documents.
2. Stick the generated shelf barcodes on all cabinets that may contain documents! These can be cabinet shelves or even folders.
3. Optionally you may also produce one or more shelf barcode booklets, where you place a copy of the shelf barcode and its description. You might consider using the barcode booklet to make your work easier.
4. Following this you may add any time the physical location code to your electronic documents.
5. The new physical location can be entered in the **Document management / Archive - search / Change shelf barcode** menu.
6. Follow the messages on the screen! First of all scan the barcode, and then, the shelf barcode of the new physical location. The operation can be executed repeatedly with one or more documents!

***Important!** - It might occur that the search based on shelf barcodes does not deliver any result, as the shelf barcode is not a mandatory entry field.*

Concerning TriDoc menu items:

A search based on shelf barcodes is available in the following menus:

Document management / Dashboard / Search here!
Document management / Document registration / Register document version
Document management / Archive – search

11. Search based on barcodes

With a scanner you can execute searches in the following menu points:

- Dashboard
- Document registration
- Archive – Search

These menu screens are prepared for the comfortable use of barcode scanners. After scanning the barcode, the system automatically searches for the version sheet in the data base and displays it. Following the search the field is automatically emptied for the case you want to do a new search without the use of the keyboard.

***Important! -** If there is no result in your search, the display fields remain empty. An additional message will not appear.*

12. Check-in / check-out control of documents

The TriDoc system supports easy document creation in work groups. Users, who want to edit the document on their own, may disable editing of the document sheet. Permitting and disabling editing of the document can be activated with the following buttons:

- **Disable editing (Enable editing)**

In case of documents disabled for editing, only the person who has disabled editing may upload a new version. Once the user has uploaded the new version, editing can be enabled again, so that other users may again upload files.

Field name	Icon	Information
-		Editing, creation of new version permitted.
-		Editing, creation of new version disabled.

Files uploaded in the TriDoc system cannot be modified!

Each time you register an edited, modified document a new version will be created. Previous versions will be stored unchanged in the archive.

13. Attach a registered document, link documents

TriDoc supports document linkages with easy functions.

Preparations:

- Check, whether all documents you want to link to each other have been registered!
- Select one of the documents you want to link to each other and view the data in the **Document management / Document registration** menu.
- Click on the **Document datasheet / Associated documents** tab! Here, you can see the already linked documents.

Reg. Nr.	Short title	Type	Status
A/100318/2009	OFFER_SPEC_REQUIREMI	021. Offer (outgoing)	
A/100311/2009	CONT_Insert - XLD	011. Contract (contracto	
B/100250/2009	LET_REQUIREMENTS	042. Letter (incoming)	

Number of rows displayed : 3

How to link a new document?

1. Check, whether the latest version of the displayed document is **Under construction** status, otherwise the system will not let you save modified data!
2. To link to a new document, first click on the + icon in the upper right corner of the table!
3. Search for the document in the appearing Pop-up window!
4. Insert the document as a linked document by double-clicking the selected document in the list or by using the drag and drop function.
5. Save the document data sheet!

What to use this function for? Frequent business requirements:

Delivery note – Handover report

Contract – Fulfilment report – Invoice

Important! *- The created link is also visible in the other document sheet!*

14. Link documents with partners

The TriDoc system supports easy linking of documents to partner companies and/or partners.

Preparations:

- Check, whether the partner companies and persons you want to link are registered in the partner list, and if not, register the necessary partner data!
- Select the document, and view its data in the **Document management / Document registration** menu!
- Click on the **Document datasheet / Associated company/person** tab! Here you can check if a document has already been linked to a company/person!

How to link a company, person to a document?

1. Check, whether the latest version of the displayed document is **Under construction** status, otherwise the system will not let you save modified data!
2. Next to the **Associate company** label there is a special combo box. You cannot select any value, because initially there are no selectable values.
3. Enter the first 2 characters of the partner company you are looking for! As a result, the combo box fills with all the companies that start with the entered 2 characters. If you do not know what character the searched value starts with, use substitute characters: **%%**!
4. Choose the company from the appearing list!
5. Similarly, if that is necessary, choose the person!
6. Save the document data sheet!

What do I use this function for? Frequent business requirements:

Contract – Link with contracting company.

Project documents – Link with external contact person.

15. Associate documents with projects

The TriDoc system supports easy linking of documents to projects.

Preparations:

- Check, whether the projects you want to link are registered in TriDoc's list of registered projects, and if not, register the necessary projects!
- Select the document, and view its data in the **Document management / Document registration** menu!
- Click on the **Document datasheet / Document core data** tab! Here you can check if a document has already been linked to a project!

How to link a document to a project?

1. Check, whether the latest version of the displayed document is **Under construction** status, otherwise the system will not let you save modified data!
2. Next to the **Project** label there is a special combo box. You cannot select any value, because initially there are no selectable values.
3. Enter the first 2 characters of the project you are looking for! As a result, the combo box fills with all the projects that start with the entered 2 characters. If you do not know what character the searched value starts with, use substitute characters: **%%**!
4. Choose the project from the appearing list!
5. Save the document data sheet!

What do I use this function for? Frequent business requirements:

Project documents – Link to a project.

List documents associated to a particular project.

16. Understanding the document status

To understand the document status let us first define the document term as used in TriDoc.

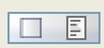
A document is a hierarchic data structure, which is made up of:

- Document sheet
- Version sheet
- Attached files

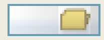
Term definition	Information
Document sheet	In all cases the status is identical wit the status of the latest version sheet.
Version sheet	The status is determined by the system upon executed operations. Please see also status transitions table.
Attached files	There is no status associated in the TriDoc system.

Below table explains from what to what status a document gets by pressing the indicated button.

Status transition table of document versions

Actual status	Button pressed / Action	Next status
 Under construction	Finalize	 Under approval **OR**  Finalized, approval not required
 Under construction	Delete	 Deleted in under construction status
	New version	

Under construction		Archived in under construction status
Archived in under construction status	Delete	Deleted in under construction status
Under approval	Approve	Approved
Under approval	Reject	Rejected
Under approval	Delete	Deleted in under approval status
Under approval	New version	Archived in under approval status
Archived in under approval status	Delete	Deleted in under approval status
Approved	Delete	Deleted in approved status
Approved	New version	Archived in approved status
Archived in approved status	Delete	Deleted in approved status
Rejected	Delete	Deleted in rejected status
Rejected	New version	Archived in rejected status
Archived in rejected status	Delete	Deleted in rejected status

 Finalized, approval not needed	Delete	 Deleted in finalized status
 Finalized, approval not needed	New version	 Archived in finalized status
 Archived in finalized status	Delete	 Deleted in finalized status

17. Define an approval workflow

There is a built-in workflow engine in TriDoc system, which in the TriDoc standard product version has been specialized for approval workflows.

Two different approval workflows are available:

- Simple approval workflow
- Advanced approval workflow

What is the difference between the simple and advanced approval workflow?

The simple approval workflow allows you to define maximum 3 approvers. The approval process is demonstrated in the diagrams of the screenshot.

In the advanced approval workflow you may define any number of approvers. The person responsible for installing the advanced approval workflow needs to understand the role of approvals levels and the technical background of the approval process.

17.1. Understanding the approval levels

Understanding the approval levels is important, because date and time for e-mail alerts can only be set with reference to the approval level.

What is an approval level?

Approvers who approve at one time in parallel are said to be on one approval level. Approval levels can be put in chronological order by their sequence number. (Serial approvers are on different approval levels.)

Example for serial approval levels:

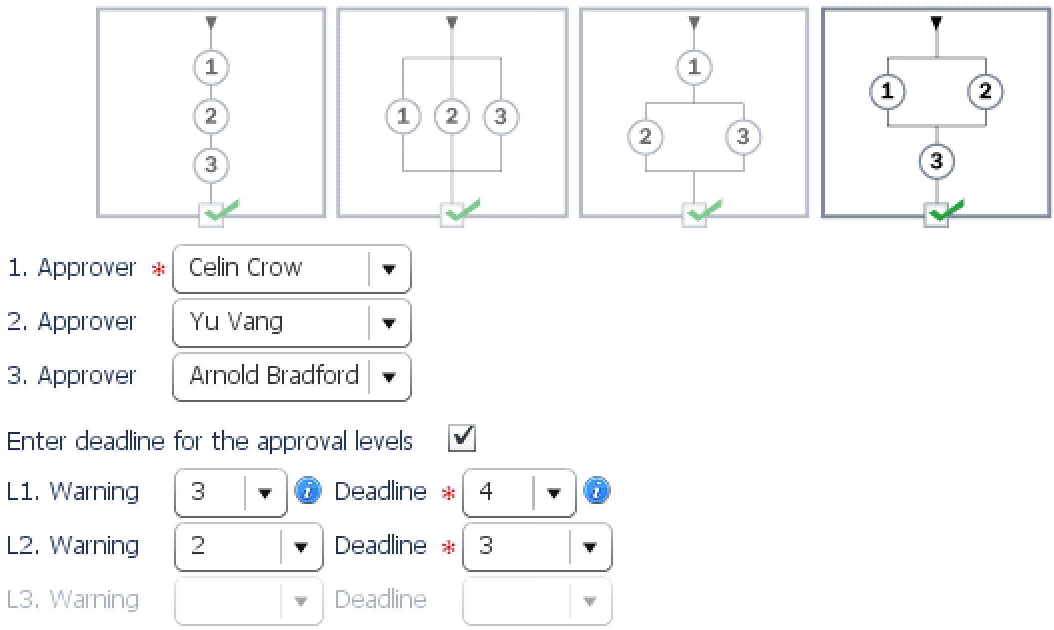
Let us have a look at a serial approval workflow, where 3 approvers, one by one, will receive an approval task. In this case, there are 3 approval levels and at each level there is one approver. For all levels you may set e-mail alerts.

Example for mixed approval levels:

In case of mixed approval levels, where out of 3 approvers the first 2 approvers get the document in parallel for approval, we distinguish 2 approval levels. At first level 2 approvers work in parallel, at second level there is one approver.

In accordance with the two approval levels you can only define two e-mail alert times: one for the first two approvers – as they work in parallel- and one for the third approver.

In the next screenshot you can see a mixed approval example, where Celin Crow and Yu Vang check the document in parallel. These approvers are on level L1. When 3 days went by they receive an e-mail alert, and when 4 days went by they receive a 2nd e-mail alert about their late approval. On level L2 you can see Arnold Bradford, who when 2 days have passed since he received the approval task will be sent an e-mail alert and when 3 days have passed will receive the e-mail alert about his late approval. This means that for the full approval process there are 7 days available in total.



17.2. Simple approval workflow

Following settings are available in the simple approval workflow:

- You can define an approval workflow for each document type.
- Within a document type, for a particular project you may define a special approval workflow.
- You can define at maximum 3 approvers.
- Various different approval workflows can be chosen (serial, parallel, etc.).
- E-mail alerts can be sent by the system when the deadline is close.
- E-mail alerts can be sent by the system when the deadline has expired.

Example for a simple approval process:

As an example imagine the following hypothetical job! At your company all outgoing proposals must be approved by two persons one after the other, first by Celin Crow sales manager and then by Arnold Bradford managing director. The proposals have to be prepared within 6 days, and you would like that 1 day before the deadline expires the system sends an e-mail alert to the responsible persons to approve the proposal.

In this case, the approval workflow has to be set as follows:

1. Check whether the necessary persons are included in the list of users, and whether the document type is listed in the core data!
2. Navigate to the following **Document management / Approval processes** menu!
3. On the **Definition of processes** panel press the **New** button!
4. Select the *021. Offer (outgoing)* document type from the **Type** combo box, and leave the **Project** field empty!
5. Select the following option: **Approval sample:** *In series*!

6. Select the first approver. **1. Approver:** *Celin Crow*!
7. Select the second approver: **2. Approver:** *Arnold Bradford*!
8. For each approval level set the number of days for sending the e-mail notification: **L1 Warning:** *5* and **L2 Warning:** *5*!
9. For each approval level set the number of days for sending the e-mail notification of the late approval: **L1 Warning:** *6* and **L2 Warning:** *6*!
10. Press the **Save** button!
11. Check whether the currently saved workflow appears in the **Approval processes** panel list!

17.3. Advanced approval workflow

The advanced approval workflow allows following settings:

- You can define an approval workflow for each document type.
- Within a document type, for a particular project you may define a special approval workflow.
- You can define any number of approvers.
- You can fully custom tailor approval workflows according to your requirements.
- E-mail alerts can be sent by the system when the deadline is close.
- E-mail alerts can be sent by the system when the deadline has expired.

***TIP!** - Before you use the advanced approval workflow function, we recommend that you first select a simple approval workflow, and then check it out in the advanced approval workflow. You will see how the approval workflow is converted into the advanced approval workflow.*

Example for an advanced approval workflow:

As an example imagine the following hypothetical job! At your company all incoming invoices have to be approved by the following persons after scanning.

First, the scanned image of the invoice needs to be approved by 2 colleagues of the production department, then by one person of the controlling department, and, finally, by 2 colleagues of the financial department. The approval takes 9 days and you would like the system to notify the responsible persons 1 day before expiry of the deadline.

In this case, the approval workflow has to be set as follows:

1. Check whether the necessary persons are included in the list of users, and whether the document type is listed in the core data!
2. Navigate to the following **Document management / Approval processes / Advanced approval workflow** menu!
3. On the **Definition of processes** panel press the **New** button!
4. Select the *031. Invoice (incoming)* document type from the **Type** combo box, and leave the **Project** field empty!
5. Enter the name of the first approving department: **Approval point:** *1. Production department* and press the **Add as new** button!

6. Enter the name of the second approving department: **Approval point**: *2. Controlling department* and press the **Add as new** button!
7. Enter the name of the third approving department: **Approval point:** *3. Financial department* and press the **Add as new** button!
8. Select the first approving department in the tree and define the first approver: **Approver user**: *Edmondo Giordano!* Select the **Deadlines** option and define the number of days you would like the system to send an e-mail alert: **Warning:** *2* **Deadline:** *3*. Press the below **Add as new** button! Similar to this set the second approver! (These approvers will get the approval task in parallel.)
9. Select the second approving department in the tree and define the approver!
10. Select the second approving department in the tree and define the approver!
11. If necessary, to modify data use the **Apply** button, or to delete elements use the **Remove** button!
12. Press the **Save** button in the lower part of the panel!
13. Check whether the currently saved workflow appears in the **Approval processes** panel list!

17.4. What happens if the workflow definition is changed during approval?

The TriDoc system allows the authorized and assigned responsible person to change the approval process as required.

If a document is currently under approval and the approval workflow is changed in exactly that moment, the following will happen:

- The system stores those approval steps already executed (approvals / rejections).
- In case of those approvals not yet accomplished, the work lists are automatically reorganized according to the new approval process.

18. Approval work lists

For all users their individual work list is prepared by TriDoc. Approval data can be viewed on the following screens:

Concerning TriDoc menu items:

Document management / Dashboard / My documents to be approved
Document management / My approval tasks
Document management / Document registration / Approval history
Document management / Document history

18.1. List of documents in the Dashboard waiting for approval

In the TriDoc system you can track evaluation and approval of documents created by yourself.

Select the following **Document management / Dashboard / My documents to be approved** menu. In the list you can find those document versions that you are responsible for and their approval is still in progress.

Deadline	Status	!	Person assigning	Short title	Category
10/27/2009			Nikolaus Perger	OFFER_BOC	02. Offers
10/25/2009			Yu Vang	CONT_Elektric	01. Contracts
09/23/2009			Edmondo Giordar	FORM-A-200	09. Forms
09/23/2009			Henriette Mazalin	INVOICE_Item 8	03. Invoices

The list will show the approval task as long as the approval has not yet been done. The status of documents already approved can be viewed on the **Document registration / Document history** screen.

18.2. My approval tasks

The TriDoc system handles individual work lists for each user. For those users who are not approvers an empty work list will appear. Depending on the access roles viewing the list can be disabled.

Users can view their work lists in the following **Document management / My approval tasks** menu.

The work list consists of three parts:

- My approval tasks

- Which of my documents have been assessed?
- Late approvals

My approval tasks

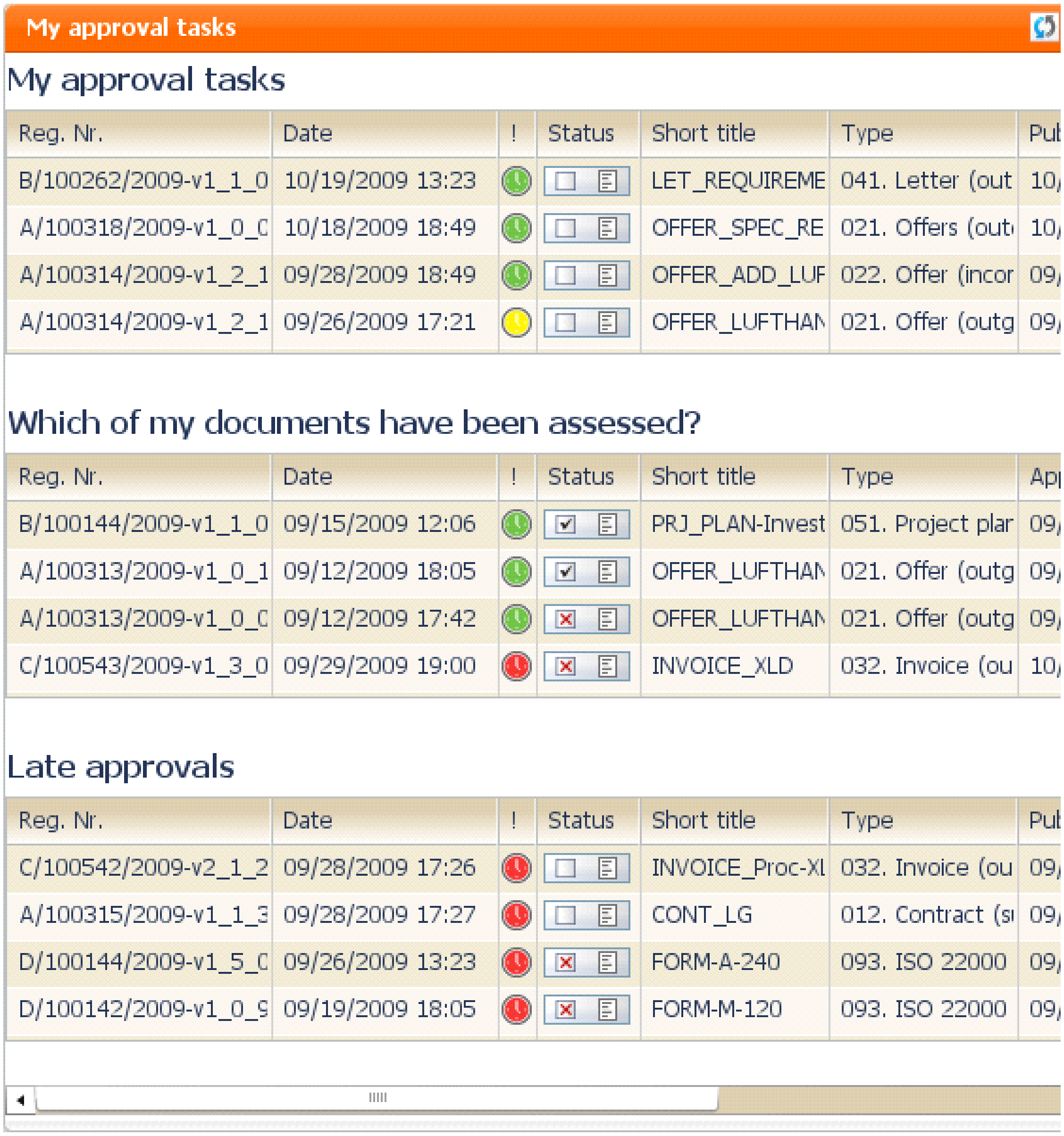
In the list you will find those document versions, which are waiting for approval. A version is only added to the list if the document a) is finalised, b) you are a responsible approver, and c) it is your turn in the approval process.

Which of my documents have been assessed?

In this list you will find those document versions where the logged in user and the responsible person are identical and the assessment has already been done (approved, or rejected).

Late approvals

In this list you will find those document versions where the logged in user is in delay for the approval of the document. You can receive e-mail alerts about late approvals, if this is enabled.



My approval tasks

My approval tasks

Reg. Nr.	Date	!	Status	Short title	Type	Pul
B/100262/2009-v1_1_0	10/19/2009 13:23			LET_REQUIREME	041. Letter (out	10,
A/100318/2009-v1_0_C	10/18/2009 18:49			OFFER_SPEC_RE	021. Offers (outı	10,
A/100314/2009-v1_2_1	09/28/2009 18:49			OFFER_ADD_LUF	022. Offer (incor	09,
A/100314/2009-v1_2_1	09/26/2009 17:21			OFFER_LUFTHAN	021. Offer (outg	09,

Which of my documents have been assessed?

Reg. Nr.	Date	!	Status	Short title	Type	Ap
B/100144/2009-v1_1_0	09/15/2009 12:06			PRJ_PLAN-Invest	051. Project plar	09,
A/100313/2009-v1_0_1	09/12/2009 18:05			OFFER_LUFTHAN	021. Offer (outg	09,
A/100313/2009-v1_0_C	09/12/2009 17:42			OFFER_LUFTHAN	021. Offer (outg	09,
C/100543/2009-v1_3_0	09/29/2009 19:00			INVOICE_XLD	032. Invoice (ou	10,

Late approvals

Reg. Nr.	Date	!	Status	Short title	Type	Pul
C/100542/2009-v2_1_2	09/28/2009 17:26			INVOICE_Proc-XI	032. Invoice (ou	09,
A/100315/2009-v1_1_3	09/28/2009 17:27			CONT_LG	012. Contract (sı	09,
D/100144/2009-v1_5_C	09/26/2009 13:23			FORM-A-240	093. ISO 22000	09,
D/100142/2009-v1_0_S	09/19/2009 18:05			FORM-M-120	093. ISO 22000	09,

19. E-mail alerts

TriDoc standard is capable of sending e-mail alerts in case of following events:

- A new document creation task has arrived.
- A new approval task has arrived.
- An approval is already in delay.
- A document has been approved / rejected.

Prerequisites to send e-mail alerts:

- Setting the SMTP server connections (in the responsibility of the system administrator).
- Setting the e-mail address of the user, and permitting e-mail alerts and notifications.

Language of e-mail alerts:

E-mail alerts are sent in the language set for the particular user.


TriDoc - Task list notification

A new approval task has arrived for you!

This is an automatically generated notification of the arrival of a new approval task. You can check the details in the TriDoc system.

Short title: PRJ_PLAN - Invest-XLD

Reg. Nr.: B/2010/100256-v1.0.0

Responsible: Yu Vang

Author: Edmondo Giordano

Creator: Yu Vang

Date of version: 05/27/2010

Date of creation: 05/27/2010

Note: Contents: Scheduling of project, aims, risks, critical criteria for success. Contact persons, availability, roles in the project.

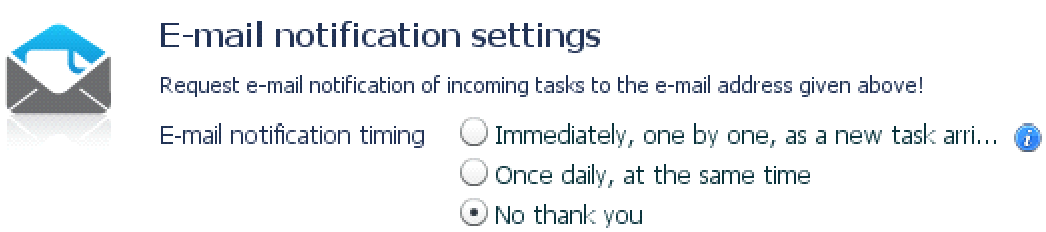
Learn more about e-mail notification

19.1. Enabling e-mail notifications

If you want to enable e-mail notifications, enter the following **Administration / User settings / My own data** menu.

How to enable e-mail notifications?

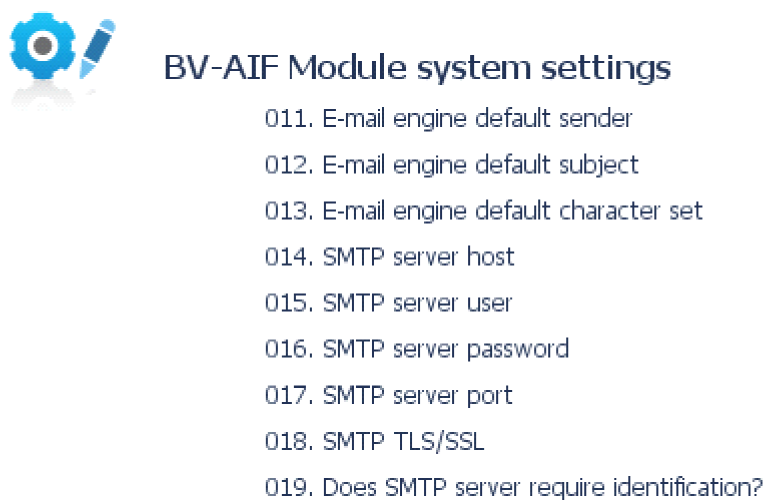
1. Set your e-mail address, where you wish to receive your e-mails! (If you are also listed in the partner list, please, set your e-mail address therein.)
2. Enable sending of e-mail notifications!



19.2. SMTP server connection settings (system administrator)

After installation we recommend the system administrator to configure the SMTP server connection settings. This is necessary so that the TriDoc system can send and receive e-mails.

To configure the SMTP server connection settings, enter the following **Administration / System settings** menu.



19.3. What kind of e-mail notifications can you configure?

Use regular E-mail notification to check your current outstanding documenting tasks!

All users can receive automatic notifications on assigned document tasks. To see which type of notifications TriDoc standard can send you, please study the table below.

Depending on the settings, notifications are automatically sent to the user's email account immediatley after a new task has been created, or once every day or week.

E-mail notificaions	Information
E-mail notifications about new document creations tasks	TriDoc is capable of sending an e-mail notification when you receive a new document creation task that pops-up in your dashboard's task list.
E-mail notifications about a new approval task	TriDoc is capable of sending an e-mail notification when you receive a new approval task popping up in your task list.

E-mail notifications about a late approval task	TriDoc is capable of sending an e-mail notification when you are late in completing your approval task.
E-mail notifications about a document being approved / rejected	TriDoc is capable of sending an e-mail notification when your document has been evaluated.

20. Send an e-mail with attached document files

You can send an e-mail with the documents stored in TriDoc as an attachment straight to your colleagues, customers.

How to send a straight e-mail with TriDoc documents attached?

1. Check whether TriDoc server can send e-mails, and whether the SMTP settings are correct!
2. Select the following **Document management / Document list** menu!
3. Search the document and load the data in the **Document management / Document registration** panel!
4. Select the document version you are looking for!
5. Click on the envelope icon in the **Register document version** panel!

6. In the pop-up window enter the addressee, subject and text of e-mail message. The files of the document version will automatically be attached.

21. View the Document history

The TriDoc system continuously records all events of the documents. If you want to know the history of a particular document, you can view it in the **Document management / Document history** menu.

Note that this menu, basically, answers two business questions, which are:

- What happened to a particular document?
- On which documents has a special action been taken?

What shall I do if I want to view the document history?

1. Select the document list: **Document management / Document list**!
2. Search the document you are looking for and load the data in the **Document management / Document registration** panel!
3. Press the **Document History** button in the **Document registration** panel! As a result the **Document History** screen will be loaded, where the document's registration number will already be filled out.

What events are recorded in the document history?

- *Acknowledge feedback*
- *Approve version*
- *Assign document preparation task*
- *Create document datasheet*
- *Delete document datasheet*
- *Delete version*
- *Finalise version*
- *Lock document*
- *Unlock document*
- *Modify version*
- *Reject version*
- *Save version*
- *Send user letter*
- *Show approval history*
- *Show document*
- *Show version*
- *Modify document datasheet*

22. Use of TriDoc in multiple languages

TriDoc is a genuine multiple language system, which means the following:

1. Out of the supported languages you can install 5 languages in the system. Users can select from these languages.
2. Labels, descriptions of the system will be displayed in the chosen language of the user.
3. Core data of the system will be displayed in the chosen language of the user.
4. Core data of the system can be saved in the 5 languages set during installation.
5. Depending on your authorizations you can modify labels of the system.
6. Depending on your authorizations you even create a new language version.

22.1. Importance of choosing languages during the installation procedure

After installation of TriDoc, in the configuration process you have to define the user languages.

The system can handle 5 languages simultaneously. The structure of 5 languages is built up as follows:

1. The first language, English is the embedded language and therefore, mandatory to use.

2. As second language, you should choose a so-called **Default system language**. This language will become your company's primary applied language.
3. Further 3 languages can be chosen optionally. The optional languages will be available for the users; however, their use is not mandatory.

***Important! -** Defining the **Default system language** properly during the installation procedure is important, because all untranslated core data will be displayed in this language, and also, log entries in the **Document history** will be stored in this language. It is not possible to change this language later. This language cannot be deleted and no other language can be chosen as default language. This language can only be set during installation!*

22.2. Remove, add a language during use of the system

The **Embedded language** (English) and the **Default system language** set in the configuration just after installation cannot be changed.

The optionally chosen 3 languages, however, can be changed according to your needs. Languages can be defined in the **Business customisation / Languages used** menu.

Remove an existing language, add a new language

To modify the languages, please follow below instructions:

1. Enter the **Business customisation / Languages used** menu!
2. From the **Other selected languages** list choose the language you want to remove.
3. Press the **>>** button. As a result the chosen language will become part of the **Unused installed languages** list.
4. From the **Unused installed languages** list choose the language you want to activate and press the **<<** button!
5. Press the **Save** button on the bottom of the panel!

***Information! -** Please, wait patiently! Activation of the new language may take a few minutes.*

22.3. Create a new language

The **Embedded language** (English) and the **Default system language** set in the configuration just after installation cannot be changed.

Do you really need a new language?

If one of the labels does not suit you or is faulty, then, for its modification you do not need to create a new language. You will need to create a new language, if the language you want to use is not included in the installation set.

The new language can be:

- A new language downloaded from the http://www.tridoc.eu site.
- A language translation prepared by the user (in .xml or .xls format. See 22.5. and 22.6.)
- A copy of a language included in the installation set (and its modification according to your needs).

If you really need a new language, then, you first need to create a new language, and secondly, to fill it with content.

How to create a new language?

1. Enter the **Business customisation / Languages used** menu!
2. Check whether in the **Other selected languages** list only max. 2 languages appear! If there are 3 languages, then you have to remove one before you create a new language. (See 22.2.)
3. If you wish to create a totally new language with no predefined content, choose the following option: **New language blank**!
4. If you wish to create a new language by inheriting content from an existing language, choose the following option: **New language with the selected content**!
5. Define the language code of the new language, e.g. en_GB! The system will identify the language based on this code. The code needs to be different from the other language codes.
6. Define the name of the new language, for example: German – Deutsch!
7. Press the **Save** button on the bottom of the panel!

***Information!** - Please, wait patiently! Activation of the new language may take a few minutes.*

22.4. Customizing, translating labels

The TriDoc standard allows rewriting and modification of system labels. Basically, you have two options to rewrite a label, these are:

- Translate the labels one-by-one directly through the system's user interface.
- Translate modify more labels at once in exported .xml or .xls files.

How to modify, translate labels through the system's user interface?

1. Enter the **Business customisation / Customise languages** menu!
2. Select the source language, which definitely will contain the language label to be translated (**Source language**)!
3. Select the target language, in which you wish create the new language label (**Target language**)!

4. Optionally select the checking language, which will help you in finding the correct translation for the label (**Checking language**)!
5. Enter in the **Label** field the first few characters of the description you want to translate! (Do not forget that you have to key it in the source language!)
6. Press the **Show** button! As a result, the system will list all those labels, which match the filter criteria.
7. From the list choose the label you want to modify, create!
8. In the **Source language** field below the list the selected label will appear. This cannot be edited!
9. Enter the changes or the translation in the **Target language** field!
10. Press the **Save** button!

***Information! -** The warning* Status *icons in the reports (The label may be too long, etc.) are only for your notification. The system cannot really check whether a particular translation will fit into its field, therefore, in all cases, this has to be checked after completion of the translation. It may also well happen that a translation being said to be too long, will, finally, fit and be displayed correctly in the field.*

***TIP! -** If in the list several identical source language labels are listed, then, this means that the same labels appear in several places in the system, maybe with a slightly different meaning. In this case, we recommend using the **Display label ID** filter criteria option. As a result the unique ID numbers of the labels will appear and you will be better in the position to select the proper label.*

***TIP! -** If you filter according to labels, you may use substitute characters. For example, if you want to search for all labels, in which the word „version" appears, then enter the following:* %version%.

22.5. Export the language data base for translation

The TriDoc standard allows rewriting and modification of system labels. Basically, you have two options to rewrite a label, these are:

- Translate the labels one-by-one directly through the system's user interface.
- Translate modify more labels at once in exported .xml or .xls files.

How to export language labels in case you want to modify, translate labels externally?

1. Enter the **Business customisation / Customise languages** menu!
2. Decide the format of the file you want the labels to export to!
3. Consequently, press either the **Language database export / import (XML)** or the

Language elements export / import (XLS) button!

4. In both cases, you choose between export and import in the pop-up window.
5. Select the language to exported and set the filter criteria according to your needs!
6. Press the **Export** button and save the file!

How to use the XML format export option?

This export format is recommended if the translation, modification of the labels will be done in an external application. In this case, you may choose one more languages for export. This format does not allow you to use filters!

How to use the XLS format export option?

This export format is recommended if the translation, modification of the labels will be done manually with MS Excel. In this case, you can only translate one language at once: from the source to the target language, optionally with the selectable checking language. In this format you can use several filters, for example you can select the labels that have not yet been translated, or you can filter them according to certain characters. Besides, you can merge labels occurring multiple times and places in the system with the use of the **There should be no duplication** option.

***TIP! -** Please, wait patiently! Activation of the new language may take a few minutes.*

22.6. Import the language database after translation, modification

How to import language labels after you have modified, translated labels externally?

1. Enter the **Business customisation / Customise languages** menu!
2. As described in section 22.5 about the export file type select the **Language database export / import (XML)** or the **Language elements export / import (XLS)** button!
3. Select the **Overwrite**… option!
4. Browse the modified file and upload it with the **Upload** button!
5. Press the **Import** button!

***Important! -** As a result the labels of the chosen language will be overwritten!*

***Information! -** Please, wait patiently! Activation of the new language may take a few minutes.*

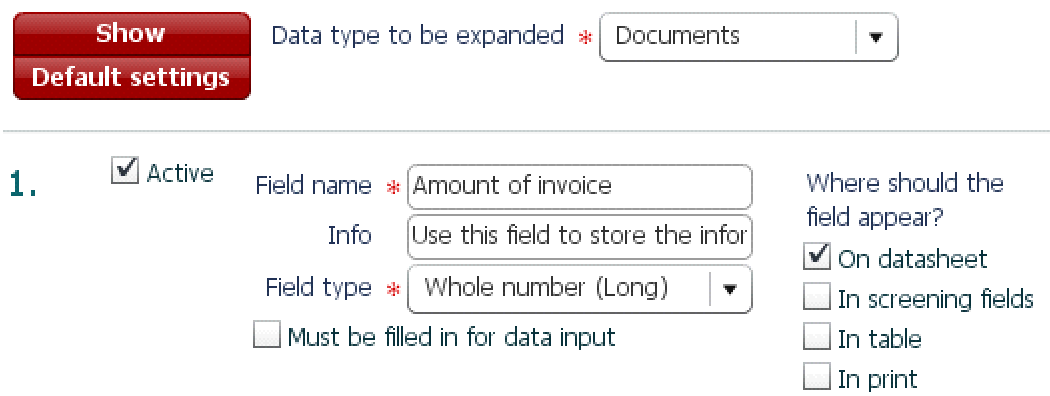
23. Custom fields

The TriDoc system allows expanding the scope of metadata by additional custom fields. Authorized users may create custom fields any time.

Expandable data types:

- Documents
- Company data
- Person data

To each of the above data types you can add 10 individual custom fields.



23.1. Add custom fields

To create custom fields enter the **Business customisation / Customise fields** menu and do the following steps:

1. Choose the data type you want to expand (**Documents, Company data, Person data**)!
2. Tick the **Active** checkbox! As a result the fields and data of the custom field settings become editable.
3. Enter the custom fields name label (**Field name**)!
4. Enter the mini help text appearing in the tooltip (**Info**)!
5. Select the type of custom field (**Field type**)!
6. Set whether filling of the field shall be mandatory (**Must be filled in for data input**)!
7. Set where the custom field should appear!
8. Press the **Save** button!

***TIP! -** Only if very reasonable make filling the custom field mandatory. custom fields cannot be seen immediately on the data entry screen as they appear on a separate tab.*

***TIP! -** Do not overwrite an existing custom field, as other users may have already used them and the appearing old data may be misleading. In this case delete also the data content of the custom fields by pressing the **Delete content** button.*

23.2. Delete custom fields in use

In each case you want to delete or modify a particular custom field you have to decide what with the saved, even several thousands of metadata should happen.

If you overwrite the custom field definition on the **Business customisation / Customise fields** screen, the data base values saved for the custom fields will remain!

If you also want to delete the data base values saved for the custom fields, press the **Delete content** button in the line of the custom field!

24. E-mail, Fax integration

24.1. Understanding the automatic registration channels

The TriDoc system is capable of connecting with its automatic registration channels to external applications or hardware devices that can send documents handled by e-mail.

From practice, it can connect with its automatic registration channels to the following external devices:

- E-mail server
- Fax server
- Multifunctional printer (scan, print)
- High performance scanner
- OCR application
- Security camera (in the moment a motion is detected the recorded file is sent by e-mail)
- Registration channels set according to projects
- etc.

What do the registration channels have in common?

All automatic registration channels are fed from an associated e-mail address with incoming e-mails and its attachments. The message text of the e-mail and its attachments are registered with the metadata set for the registration channel.

24.2. Automatic registration of e-mails

For automatic registration of the e-mails define one or more registration channels. To start enter the following **Business customisation / E-mail, Fax integration** menu.

In the bottom left corner of the input screen you can set data of the automatic registration channel. These data can be divided into 2 groups:

- Data of mail boxes you want to access with the registration channel (**Enter group registration channel**).
- Metadata you want to use during automatic registration (**Enter data to be filled in automatically**).

How to create an e-mail registration channel?

1. Press the **New** button!
2. Define the name of the registration channel (**Channel name**)!
3. Set the parameters to access the mail box! (**User name**, **Password**, **E-mail server**, etc.)!
4. Use the expression „**(Mail subject)**" in order to make the e-mail subject displayed in the title fields (**Short title**, **Title**)!

5. Define with what metadata the automatically registered documents should be registered with (**Category**, **Type**, **Project**, etc.)!
6. Press the **Save** button!
7. Press the **Test** button! During testing the icon in the **Status** column indicates the synchronization procedure. If an **OK** labelled icon appears at the end, the system has successfully registered the documents queuing in the registration channel.

*TIP! - The table fields **Number of e-mails** and **Processing time** show you how many e-mails have been processed in last synchronization of the registration channel, and how long the synchronization procedure took.*

Important! - If you want to operate more several registration channels, please consider that the automatic registration channels cause a high workload for the TriDoc server. In such a case we strongly recommend the use of high performance hardware equipment.

Referring sections:

7.1.4. Automatic registration through the use of automatic registration channels (e-mail, fax, scanner) >>

24.3. Automatic registration of fax messages

The TriDoc system allows automatic registration of documents received through a fax server. For this you need to create for each fax server one automatic registration channel.

Create the automatic registration channel as described in section 24.2.!

Besides the connection parameters you need to set the following data:

- Fax server integration option
- Category: 11. Filed faxes.
- Type: 112. Fax (incoming)

Referring sections:

7.1.4. Automatic registration through the use of automatic registration channels (e-mail, fax, scanner) >>

24.2. Automatic registration of e-mails >>

24.4. Easy integration of scanners and multifunctional devices

The TriDoc system allows automatic registration of documents received from scanners and multifunctional devices. You need to create at least one automatic registration channel for each scanner and multifunctional device to do so.

Create the automatic registration channel as described in section 24.2.!

TIP! - *On those multifunctional devices where the option to configure one or more e-mail addresses is supported set separate e-mail addresses for contracts, proposals, incoming invoices, etc. For the same e-mail addresses define automatic registration channels with the appropriate document categories.*

Referring sections:

7.1.4. Automatic registration through the use of automatic registration channels (e-mail, fax, scanner) >>

24.2. Automatic registration of e-mails >>

25. MS Office integration

25.1. MS Word Add-In

The TriDoc system allows that prepared Word documents are registered directly from the MS Word application. For the use of the MS Word Add-In function, you have to install MS Office and the TriDoc Add-In on all laptops and client machines, where TriDoc can be accessed from. The Add-In can be downloaded from the **Business Customization / MS Office integration** menu.

After installation the TriDoc menu appears in the main menu of the MS Word application.

Important! - For the installation of the MS WORD Add-In the Installation of the .net framework is required. This is automatically installed within the TriDoc Add-in installation. After installation you have to enable the use of the Add-In the MS Word application.

TIP! - With the MS Word Add-In you can only enter metadata in the scope it can also be found in the Quick registration *panel. Other Data can only be entered on the TriDoc* Document registration *Screen.*

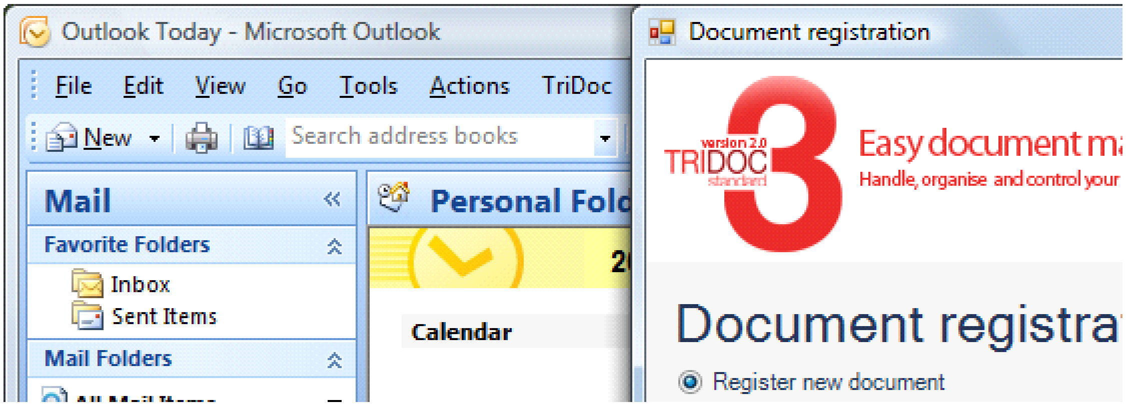
Referring sections:

7.1.3. Quick registration through the Add-In in the MS Word and MS Outlook >>

25.2. MS Outlook Add-In

TriDoc system allows you to register your incoming messages directly from the MS Outlook application. For the use of the MS Outlook Add-In function, you have to install MS Office and the TriDoc Add-In on all laptops and client machines, where TriDoc can be accessed from. The Add-In can be downloaded from the **Business Customization / MS Office integration** menu.

After installation, in the main menu of MS Outlook the TriDoc menu will appear.



__Important! -__ For the installation of the MS Outlook Add-In the Installation of the .net framework is required. This is automatically installed within the TriDoc Add-in installation. After installation you have to enable the use of the Add-In the MS Outlook application.

__TIP! -__ With the MS Outlook Add-In you can only enter metadata in the scope it can also be found in the Quick registration *panel. Other Data can only be entered on the TriDoc* ***Document registration*** *Screen.*

Referring sections:

7.1.3. Quick registration through the Add-In in the MS Word and MS Outlook >>

26. Partner management

26.1. Company data registration

The TriDoc system allows registration and search of company data.

How to register a new company?

1. Enter the **Partner management / Company maintenance** menu.
2. On the left panel press the **New** button!
3. Fill in the company data!
4. You can also register further data, in particular custom fields, in the **Other data** tab of the right panel.
5. Press the **Save** button!

On the company data sheet you can save the following metadata:

Field name	Icon	Information
Short name	-	-
Full name	-	-
Company type		This item is important for shaping the company hierarchy. Companies can be assigned to the company groups, and departments can be defined for the companies.
Status		Inactive data may be displayed in the reports, but during data recording these are not included in the combo boxes.
Category	-	-
Superior company		This field determines which unit is the superior body of an organizational unit. TIP: With the help of this you can shape the hierarchical structure of your own company.
Unit manager		The organizational unit manager may receive special notification of late operations.
Company profile		The company's chief sphere of activities must be selected from predefined values.
Company profile description		TIP: Use this field to indicate additional activities of the company!

Headquarters		The order of address particulars: house number + street, settlement, postcode, country.
Billing address	-	-
Phone	-	-
Fax	-	-
E-mail	-	-
Web page	-	-

Information!* - *On the Supplementary datasheet panel you can find the External identification number (EID) field. This external ID allows you to search in other systems, for instance also based on identification codes stored in SAP.* *TIP:* *You can also store identification codes here from the older system which has been replaced.

TIP!* - *If you have already saved the company data, press the* Add new person to this company >> *button! With the use of this function you can add easily new persons belonging to the company.

Referring sections:

3.3. Input, import persons, companies >>

26.2. Person data registration

The TriDoc system allows registration and search of person data.

How to register a new person?

1. Enter the **Partner management / Person maintenance** menu.
2. On the left panel press the **New** button!
3. Fill in the person data!
4. You can also register further data, in particular custom fields, in the **Other data** tab of the right panel.
5. Press the **Save** button!

On the person data sheet you can save the following metadata:

Field name	Icon	Information
Salutation		Mr / Ms / Mrs / PhD / Dr / ...
First name	-	-
Last name	-	-
Company		NOTE: This is a special combo box, which fills in the search result after the first two characters have been entered. To display the first 100 items, enter the following: %%
Status		Inactive data may be displayed in the reports, but during data recording these are not included in the combo boxes.
Gender	-	-
Position		In the interest of performing efficient searches, the position of the given person must be selected from predetermined values. TIP: Use this field to store the position shown on the business card!
Decision level		This field provides information on the presumed decision rights of the client's or partner's employees.
Monogram	-	-
Address		The order of address particulars: house number + street, settlement, postcode, country.
Mobile	-	-
Phone	-	-
Fax	-	-
E-mail	-	-
Web page	-	-
Messenger	-	-

Information! - *On the Supplementary datasheet panel you can find the External identification number (EID) field. This external ID allows you to search in other systems, for instance also based on identification codes stored in SAP.* ***TIP****: You can also store identification codes here from the older system which has been replaced.*

TIP! - *If you have already saved the company data, press the* Add new person to this company >> *button! With the use of this function you can add easily new persons belonging to the company.*

Referring sections:

3.3. Input, import persons, companies >>

27. Partner integration

27.1. What type of formats can be imported?

To support the import of partner core data, TriDoc offers sample files for you, so that you can easily check whether the import file complies with the formal requirements of the system. Prior to and after the import TriDoc allows you to check your data, and if you require also to subsequently revoke the import.

What do you need to know about the structure of the import files?

Information! *- Please note: The system matches the database fields by the name of the data columns. Data in the red columns are mandatory; all other columns can even be missed out.*

Information! *- The TriDoc system stores the EID (External ID) to identify the imported records. In case a record with the same EID is imported twice, the system will update the existing one (if enabled).*

Information! *- The sequence of the columns is not important; you can change it if you wish.*

Information! *- You can not import any other columns as indicated in the example below. Importing custom field data is not supported.*

Information! *- If the import file is automatically generated by an external system you can use the original column names of the external system, if you have previously translated the column names in the* ***Custom language*** *menu point.*

27.2. One-time partner data import from an MS Excel file

How to import partner data form an excel file?

1. Enter the **Partner management/ Partner integration** menu!
2. By pressing the **Company data sample** or the **Person data sample** button download the sample data!
3. Check whether format and structure of your file complies with the sample data file.
4. Select the **Single import** tab!
5. Choose the type of data you want to import: **Company data** or **Person data**!(If you want to import both type of data, then first choose the company data, as the person data may refer to the company data.)
6. By pressing the **Upload** button upload the Excel file!
7. If you want to overwrite the data of your data base with the data imported through

the excel file, then enable the following function: **Overwriting permitted**!

8. Press the **Import** button!
9. Check whether in the import report in the right panel any warnings or errors appear!
10. If due to faulty data you want to reimport the file, press the **Delete imported companies** or the **Delete imported persons** button, and repeat the import procedure!

Important! - *Use the* ***Delete imported companies*** *and* ***Delete imported persons*** *buttons only immediately upon the import. Do not use it to delete old data or data that has been imported by someone else, as, in this case, after manual modification it is not possible to reset all data.*

Link persons with companies!

If you import person and company data, you can link the persons to companies. This can be done by adding the company EID to the person data.

TIP! - *We recommend granting access rights to this function only for one user.*

27.3. Partner integration with a central partner management system

In order to install an automatic and regular synchronization of the partner data from Excel files, you have to, besides the steps described in previous section.

Follow the below instructions:

1. Enter the **Partner management/ Partner integration** menu!
2. By pressing the **Company data sample** or the **Person data sample** button download the sample data!
3. Check whether export files of your central partner management system comply in format and structure with the sample data file!
4. Select the **Partner integration** tab!
5. Define the path and file name, in which the company data will regularly be created by the central partner management system. (The subdirectory must be accessible for the TriDoc server!)
6. Define the path and file name, in which the person data will regularly be created by the central partner management system! (The subdirectory must be accessible for the TriDoc server!)
7. Select the frequency of synchronization (**Import frequency**)!
8. Press the **Save** button!
9. Press the **Test** button!
10. Check whether in the import report in the right panel any warnings or errors appear!

11. If the format and structure has been set correctly and the data sets of the company and person data are updated regularly by the central partner management system, then you have successfully set the partner integration!

TIP! - *We recommend granting access rights to this function only for one user.*

28. User management

28.1. Create users

During installation of TriDoc system the system administrators set their login and password. Logging in with this login name additional users can be created.

How to create a new user?

1. Enter the **Administration / Users** menu!
2. Press the **New** button on the bottom of the panel!
3. Fill in the fields below the table4
4. Select the access roles of the new user (**Access role**)!
5. Press the **Save** button!

Field name	Icon	Information
Full name	-	-
User name	-	-
Language	-	-
Authentication		In order to use LDAP authentication, the link with the LDAP server must be configured in the system settings.
E-mail		The system will use the e-mail given here to send user messages. Notification of the arrival of a new task can be sent to this e-mail on request.
Person		This field links the user recorded here with the data entered in the person records.
Password	-	-
Confirm password	-	-
Start of validity period		The system allows login of users from date and time as specified here. If the user has several times unsuccessfully tried to login and he has temporarily been banned, then, with the deletion of this date and time, he can login again.
End of validity period		The user can log in until the date given here.

May login as administrator		In case of login as administrator, the system provides complete authorization without restriction to all functions of the system and to every data group.
Active		Inactive data may be displayed in the reports, but during data recording these are not included in the combo boxes.
Access role		You may define several access roles for any user. Press and hold the Ctrl button, then click on the required access roles.

***Important! -** Do not set LDAP authentication as long as the connection with the LDAP server has not yet been configured!*

***Important! -** Tick Only for the user with administrator rights the **May log in as administrator** checkbox!*

***Information! -** The administrator may create as many users as required; the system can only be used simultaneously by as many users as user licences are uploaded.*

28.2. Setting access roles for the users

The TriDoc system allows assigning different access roles. If required, the access roles may relate with the user's job role.

To the access roles you may set the following access rights:

- Function access rights
- Category access rights

Project access rights may only be set for the users!

Access roles can be created in the following menus:

Administration / Function authorization

Administration / Category authorization

How to create new user access roles?

1. In the left table select the one of the predefined access roles that is the closest to the new access role you want to create.

2. Press the **Copy** button!
3. Modify the name of the new access role!
4. In the lower left panel press the **Save** button!
5. Select the newly created access role from the left table!
6. In the right panel select the access right element you want to modify. Data of the element will be displayed in the fields below the table.
7. Modify the associated access rights.
8. Press the **Save** button in the bottom of the panel!

***Important! -** The created access role can be associated with the user in the **Administration / Users** menu.*

28.3. Readmit security banned users (due to faulty logins)

After several unsuccessful logins the TriDoc system bans the particular user.

What you should know about banning of a user?

- The security banning is only valid for a certain period of time, after expiry the user automatically readmitted for login.
- The banning can be manually offset by the system administrator.
- The maximum number of login trials can be set by the system administrator. (System setting 114.)
- The length of banning period can be set in hours by the system administrator. (System setting: 115.)

Setting of banning parameters:

Administration / System settings

Readmit a banned user:

If a particular user has more often than permitted unsuccessfully tried to access the system, then the TriDoc system automatically modifies the user's start of validity period. The length of banning period is added to the time of the unsuccessful login trial, and then, this is saved as the new start of validity period.

How to readmit a security banned user?

1. Enter the **Administration / Users** menu!
2. Filter for and select the banned user from the list!
3. Delete content of the **Start of validity period** field!
4. Press the **Save** button!

28.4. Relation between users and persons registered in partner management

The TriDoc system allows the system to handle users of the system and persons registered in partner separately. At the same time, it is also supported that users become listed in the partner registry.

In this case you have to link the users with the persons registered in the partner registry.

How to lint the users with the persons?

1. Check whether all users have been created in the system: **Administration / Users**!
2. Check whether Your Company's data has been registered in the system: **Partner management / Company list**! (This is a company with an accentuated role; do not create a new company!)
3. Save the users one by one as persons of the partner registry: **Partner management / Person maintenance** and enter the settings that the person works in your company!
4. Enter the **Administration / Users** menu!
5. In the **Person** combo box select for each user the person the user should be associated with.
6. Press the **Save** button.

***Important!** - Your Company's data sheet plays an accentuated role, therefore, after installation the system prepares a company data sheet wit the following name: This is your company. Please rename it!*

Modify the data and save it. If you cannot avoid to create a new company data sheet to save your company's data, you have to set its ID in the System settings 201 *parameter!*

29. Proxy management

The TriDoc system allows that certain users may be deputized by other users. Proxies can be managed according to the following two options:

- **User set the proxy themselves**. For example, before they are away on leave they set their proxy themselves.
- **The proxy is set centrally.** For example in case of an unexpected illness or accident, a responsible person may centrally set the proxy.

Proxies may be set in the following menu:

Administration / User settings / My proxies

Administration / Proxies

How to centrally manage the proxies?

1. Enter the following menu: **Administration / Proxies**!
2. In the fields below the table you can add a new proxy. The fields above the list are for filtering purposes!
3. Below the table, from the **Person** combo box select the person to be deputized!
4. Below the table, from the **Proxy** combo box select the proxy person!
5. Below the table, from the **Proxy type** combo box select the type of proxy!
6. Define the length of proxy period in the **Period** field!
7. If necessary, write a detailed remark as reason of the proxy in the **Note** field!
8. Press the **Save** button!

29.1. Understanding the proxy process

What happens if you set a proxy?

- In the **Dashboard** of the proxy the document creation tasks of the deputized person are displayed – **Document management / Dashboard**.
- In the proxy's approval list the approval tasks of the deputized person are displayed – **Document management / My approval tasks**.
- The proxy also receives e-mail alerts of the deputized person (if the e-mail notifications are enabled).
- Document access rights are granted to the proxy for the time period the proxy is set.
- Function access rights are granted to the proxy for the time period the proxy is set.
- The proxy is in the position to approve documents sent to the deputized person. In this case the system indicates the proxy as approver.

Important! - *Only a one level deputy is allowed!*

Proxies of the Proxies (… and their proxies) will not get the proxy right.

Due to security, transparency and technical reasons TriDoc does not support a more than one level proxy policy.

TIP! - *You can also indicate more proxies!*

If you do not know who your proxy will be, you can also define several proxies. In this case the proxies will receive the tasks in parallel and all of them are in the position to deputize you.

30. Function access right handling

30.1. What does function access right mean?

TriDoc allows the system administrator to associate different function access rights to the different user access roles. With function access rights you can control users to access the menu function irrespective of the data content.

You can associate function rights to the following:

- Menu points (Main menu and submenus).
- Function buttons (any button triggering server interaction - **Save, Show, Delete, Export, Import,** etc).

Information! - *Control over the function access right is executed via the server-side. Therefore, from an external application you can only access system functionality if you have the access right.*

TIP! - *After any modification of the access rights, in any case, you need to test the system.*

30.2. Assign function access rights to access roles

The TriDoc system allows assigning detailed function access rights to the registered user access roles.

How to assign function access roles?

1. Enter the **Administration / Function authorization** menu!
2. On the left side you can see the registered user access roles, on the right side – after selecting the access role – the assigned access rights will appear.
3. Select an access role, for example: *04. Default – Team worker*!
4. Select an access item, for example: *Core Data*!
5. Set the function access right as necessary, for example: Deny access to modify core data for a certain user access role! For this, set the **Authorization** combo box value to ___ - *No Access*.
6. Press the **Save** button!

The following access right values can be set:

- ___ - No Access
- X__ - Reading right
- XX_ - Reading and writing right
- XXX – Full right
- *** - Individual right (only for display of mixed rights)

Save each access right one after the other!

Each access right item has to be saved after each effected modification.

****** - Individual right***

In case several access right are mixed within one menu item (Full right, No access), then it cannot be displayed unambiguously what access rights are valid for that particular menu point and user. In this case in the table this indication is displayed. (When defining the access rights this is not a selectable option!)

31. Category access right handling

31.1. What does category access right mean?

TriDoc allows the system administrator to associate different category access rights to the different user access roles (data level access right). With category access rights you can control users to access the document provided the respective function right has been assigned.

You can associate category rights to the following:

- To all valid document categories created as core data type.

***Information! -** Control over the category access right is executed via the server-side. Therefore, from an external application you can only access metadata of the saved document if you have the access right.*

***TIP! -** After any modification of the access rights, in any case, you need to test the system!*

31.2. Assign category access rights to access roles

The TriDoc system allows assigning document category access rights to the registered user access roles.

How to assign document category access roles?

1. Enter the **Administration / Category authorization** menu!
2. On the left side you can see the registered user access roles, on the right side – after selecting the access role – the assigned access rights will appear!
3. Select an access role, for example: *04. Default – Team worker*!
4. Select an access item, for example: *03. Invoices*!
5. Set the access right for that function as necessary, for example: Allow users only to read documents of the selected category type. For this, set the **Authorization** combo box value to *X__ - Reading right*!
6. Press the **Save** button!

The following access right values can be set:

- ___ - No Access
- X__ - Reading right
- XX_ - Reading and writing right
- XXX – Full right

Save each access right one after the other!

Each access right item has to be saved after each effected modification.

32. Project access right handling

32.1. What does project access right mean?

The TriDoc system allows the system administrator to assign project access rights to the registered users.

With project access rights certain additional rights might be granted to the users, that otherwise would not be possible to rule sufficiently with the category access rights.

For example, if users are granted the following access rights:

- Function access right: *Document list* *XXX- Full right,*
- Category access right: *02. Offers* *XXX-Full right,*
- Category access right: *01. Contracts* *___-No Access,*

then, according to the settings, the users could not see the contracts in the document list.

With project access rights you can grant access to all documents of a particular selected project, i.e. also to the contracts of the project. As an effect users will only see those contracts that belong to the particular project, whereas documents of other projects cannot be seen.

You can associate project access rights to the following:

- Projects (all project documents that are linked to a particular project).

***Information! -** Control over project access right is executed via the server-side. Therefore, from an external application you can only access metadata of the saved document if you have the access right.*

***Information! -** In deviation from the other access rights project access rights cannot be assigned to access roles, but only to users.*

***TIP! -** After any modification of the access rights, in any case, you need to test the system!*

32.2. Assign project access rights to users

The TriDoc system allows the system administrator to assign project access rights to the registered users.

How to assign project access roles?

1. Check whether the required projects are listed in the project registry!
2. Enter the **Administration / Project authorization** menu!

3. On the left side you can see the registered users. On the right side the assigned project access rights are displayed.
4. Select a user!
5. From the list select the required project!
6. Set the required project access right, for example: The user should be able to view documents of a particular project. For this, set the **Authorization** combo box value to *X__ - Reading right*!
7. Press the **Save** button!

The following access right values can be set:

- ___ - No Access
- X__ - Reading right
- XX_ - Reading and writing right
- XXX – Full right

Important! - *Only additive access rights can be granted with project access rights!*

If a user has been granted full access rights to particular documents, then it cannot be withdrawn with project access rights.

Save each access right one after the other!

Each access righ item has to be saved after each effected modification.

33. System settings

33.1. SMTP server settings

Amongst others the SMTP server connection allows the TriDoc system to send e-mail notifications to the users.

How to set the SMTP server parameters?

1. Enter the **Administration / System settings** menu!
2. Set the values of the following parameters: **011-019**!
3. Press the **Save** button!

Field name	Icon	Information
011. E-maile engine default sender		E-mail sent by the system will be sent out from this address
012. E-maile engine default subject		E-mails sent by the system will be sent out with this subject.
013. E-maile engine default character set		E-mails are sent to users by the system with character coding of this típus.
014. SMTP server host		SMTP server host (smtp.yournetpartner.com)
015. SMTP server user		Mail server user name.
016. SMTP server password		This parameter is required, if you want to use e-mail notification or the direct e-mail sending function.
017. SMTP server port		This parameter is required, if you want to use e-mail notification or the direct e-mail sending function.
018. SMTP TLS/SSL		Here you can set the use of secure channel, if the SMTP server needs it.
019. Does SMTP server require identification?		Does the system need a password to use the mail server?

***Important! -** True / False! In case of those parameters where you have to answer with Yes or No, set the parameter to „YES” or „NO” for any language.*

33.2. Password policy settings

The password policy settings enable TriDoc to allow for the users only strong passwords.

How to set password policy settings?

1. Enter the **Administration / System settings** menu!
2. Set the values of the following parameters: **110-115**!
3. Press the **Save** button!

Field name	Icon	Information
110. Password policy – Minimal length of password		Here you can define the minimal number of characters in the password. If you set zero or a negative number you switch off the password check.
111. Password policy – Minimal number of capital characters in password		Here you can define the minimal number of capital letters in the password.
112. Password policy – Minimal number of numeric characters in password		Here you can define the minimal number of numeric characters in the password.
113. Password policy – Minimal number of speial characters in password		Here you can define the number of special characters (e.g.: !@#$^&!=) mandatory to use in the password.
114. Password policy – How many times can the user try to log in.		How many times can the user try to log in?
115. Password policy – Length of security banning period (hours).		Here you can define the period of time after which the user will be permitted again to login, if he has been banned before.

33.3. LDAP server connection settings

The LDAP connection allows the TriDoc system to use the user passwords defined in the LDAP server. In this case, users may login into the TriDoc system by using their password registered in the Windows, Linux and MAC OSX operation system.

How to set the password policy parameters?

1. Enter the **Administration / System settings** menu!
2. Set the values of the following parameters: **121-126**!
3. Press the **Save** button!

Field name	Icon	Information
121. LDAP URL		LDAP url (ldap://localhost:389)
122. LDAP user routes		E.g.: OU=Trilobita
123. LDAP host		Name of the LDAP server (ldapserver.yourcompany.com).
124. LDAP port		LDAP port (389)
125. LDAP Windows Active Directory – Default Naming Context		Example: cn=trilobita-int.hu, dc=hu
126. LDAP User identification template		LDAP user identification template.

33.4. Registry number format settings

Through the registry number format setting function the TriDoc system allows you to customize the registry number format according to your business needs.

How to set the registry number format and other parameters of document registration?

1. Enter the **Administration / System settings** menu!
2. Set the values of the following parameters: **302-305**!
3. Press the **Save** button!

Field name	Icon	Information
301. Identification code for document from category		The document form category has a distinguished role, so the system identification code must be entered.
302. Value of initial registration number		Initial registration number value.
303. When registering new version local value of which version should increase?		Here you can enter the version for which the system should automatically increase the local value when a new version is registered.
304. Format of document registration number		The make-up of the registration number may be changed. The descriptive expression for the format may be entered here.
305. Format of document version registration number		The document versions can be given a special registration number format. The expression describing the format can be entered here.

What you should know about the document registry number!

The document registry number ({DOCREGNUM}) consists of the following:

- **{REGBOOK}** – Name of the registry book defined in the core data.
- **{REGNUM}** – Sequential number, for each registry book separately, reset at the beginning of each year.
- **{YYYY}** – Year of registry.

The registry number of the document version consists of the following:

- **{DOCREGNUM}** – The above registry number
- **{v1}** – The highest ranked digit of the version number.
- **{v2}** – The second digit of the version number.
- **{v3}** – The third digit of the version number.

Examples for registry book format settings:

Registry number format	Examples of the generated registry number
{YYYY}/{REGBOOK}/{REGNUM}	2010/A/100001
{REGBOOK}/{REGNUM}/{YYYY}	A/100001/2010
{YYYY}/{REGNUM}/{REGBOOK}	2010/100001/A
{YYYY}/{REGNUM}/{REGBOOK}	10/100001/A
{YYYY}{REGNUM}-{REGBOOK}	2010100001-A
{YYYY}{REGNUM}	2010100001
{YYYY}{REGBOOK}{REGNUM}	2010A100001

Important! *- You can only skip the registry book number from the registry number format ({REGBOOK}), if it can be guaranteed that only one registry book will be used.*

Important! *- Do not use dots or commas as separation characters before the registry book's alphabetic character! It will cause an error if the following characters appear in the generated registry number .E, E!*

33.5. Setting the number of rows displayed in the result lists.

The TriDoc system allows setting the number of rows displayed in result lists. Due to workload issues only the first 100 rows of a result list are displayed.

How to set the number of rows displayed in the result lists?

1. Enter the **Administration / System settings** menu!
2. Set the value of the following parameter: **023. Maximum number of rows appearing in reports (row)**!
3. Press the **Save** button!

TIP! *- The optimal value of this parameter is between 20-500. Do not set a row value higher than 1,000. A higher value also results a high workload on the client machines.*