

HAESSLER

**Using
DoRIS[®] 7.0 Webclient**

User Guide

User Guide for Software: DoRIS® 7.0 Standard-Software for Document-Management and Business Procedures.
Webclient for Users.

Publisher: HAESSLER Verlag (www.haesslerverlag.de)
Design: HAESSLER design
Editor: Joachim Haessler

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Latest information on DoRIS® 7.0 please find on www.registratur.com.

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2nd revised Edition; June 2012

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DORIS®

DoRIS® (Document Retrieval and Information-System) is a Standard-Software for Document Management and Business Procedures. It is certified by DOMEA (Document Management and Electronic Archive), which is a recognized mark of quality assurance for Document Management Systems (DMS) and Business Process Applications.

DoRIS® was developed by HAESSLER in collaboration with the federal ministry of transport, building- and municipal development (Bundesministeriums für Verkehr, Bau und Stadtentwicklung, BMVBS) according to the ministry's need, which requires a high level of efficiency in its administrative work. The increase in efficiency is guaranteed by features of search, electronic processing and business processes, whilst the increase in security is ensured by email-archiving, converting of Office documents in long term archiving formats or generating of documents from content of databases.

For comprehensive product information please order the "DoRIS® catalog" at vertrieb@haessler.com or go online www.registratur.com.

Practical, efficient, versatile, and as simple as email

DoRIS® is a modular system which can be easily integrated into, for example, an existing email system to offer extended work process management. Flexible workflow processes adapted to the specific needs of the organization can relieve the grind of daily paperwork and make more time available for qualitative assessment of information.

DoRIS® records are available at the click of a button – wherever you happen to be working. DoRIS® can adapt to existing work practices, delivering better search results at the same time as maximizing storage efficiency.

DoRIS® solutions deploy the common Microsoft design, therefore allowing DoRIS® features to be easily acquired and intuitively applied.

This user guide was written with users in mind, as well as employees of registry:
read how to create, search for or edit files and documents in DoRIS® databases;
learn how to start and save queries;
experience how to initiate process files and thereby manage ad-hoc workflow processes.

The DoRIS® Team of the federal ministry of transport, building- and municipal development (Bundesministeriums für Verkehr, Bau und Stadtentwicklung, BMVBS) and HAESSLER wish you success using this software - enjoy working with DoRIS®!

TYPOGRAPHIC CONVENTIONS

In this user manual various typefaces are used to orientate whilst working through this guide. The table below shows the typefaces used and their meaning.

Fieldname	describes names of fields in entry masks, file names and directory data
<i>data entry</i>	describes the data input in the appropriate field of the entry mask
KEYS	describes keys
	“+” between two keys, e.g. CTRL+V: press the first key, hold and press the second key
	“,” between two keys, e.g. ESC, H: press keys one after the other
Menu item	describes names of drop-down menus, program names and commands
„OK“	describes - in quotes - buttons, tabs, references to chapters- or section-headers etc.
<Wildcard>	describes – in angle brackets –wildcards
	during your data input replace the wildcards including brackets with the actual value

DORIS® WEBCLIENT

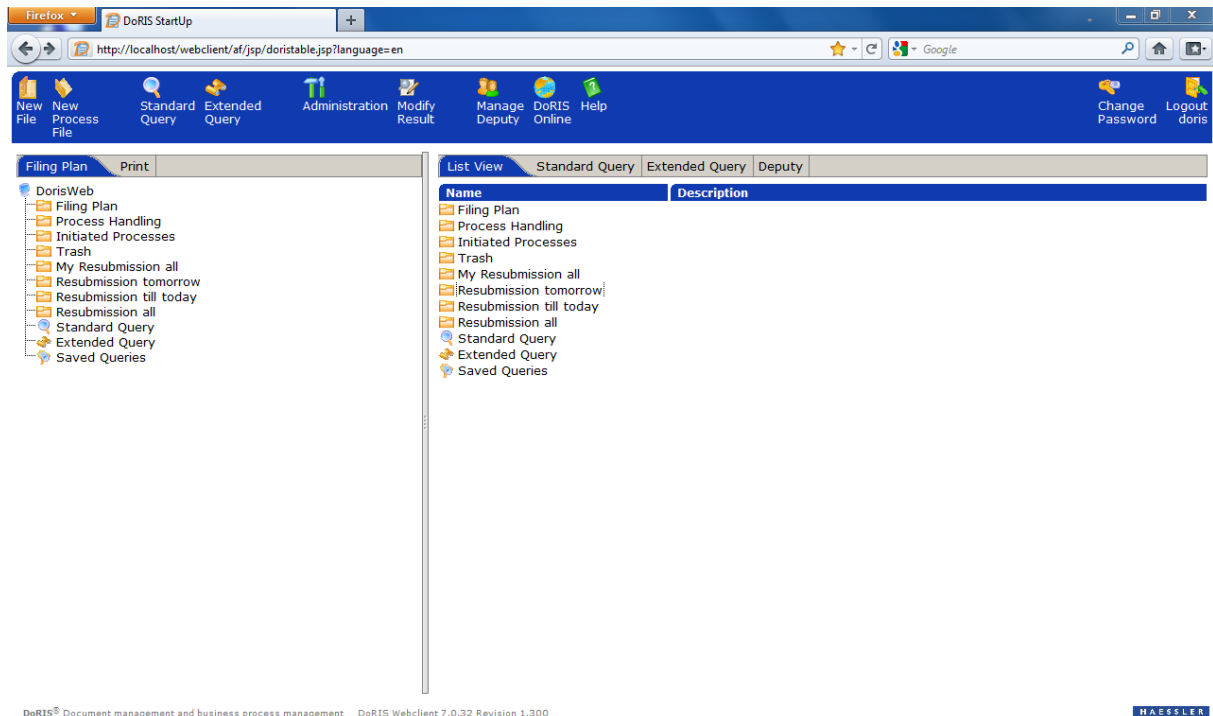
DoRIS® Webclient – Getting Started

To start **DoRIS® Webclient** follow the guidance of your administrator to the log in screen.




Log in screen

Log in the system with your username / ID and your password. The database is opened. You see the main screen with the tree view of the folders of the database on the left side.



Main screen

Exit DoRIS® Webclient

If you want to exit **DoRIS® Webclient** log out of the system . The log out screen is displayed. Of course you could immediately log in again, if necessary.



Logout completed!

You have been logged out safely and successfully.
Thank you for using DoRIS Webclient.

[back to start page](#)

Log out screen

DoRIS® Main Screen

Tree View of Database

The tree view (left side of the main screen) displays the available database and its comprising folders. On the right side (list view) you see the content of the left-chosen unit (which is similar to the Windows Explorer).

In the toolbar you will find various icons, e.g. to create or edit records, start queries, for administrative purposes, or to log out. The different tabs give you the option to directly enter information, start queries etc., details of which you will find on the following pages.

The screenshot shows the DoRIS Webclient interface in a Firefox browser window. The address bar displays the URL: `http://localhost/webclient/af/jsp/doristable.jsp?View=TreeView%2FAktenplan%2F1.01%2F1.01.01&Act=Aktenplan%2F1.01%2F1.01.01.01&...`. The toolbar includes icons for 'New File', 'New Process File', 'Standard Query', 'Extended Query', 'Administration', 'Modify Result', 'Manage Deputy', 'DoRIS Online', 'Help', 'Change Password', and 'Logout doris'. The main area is divided into two panes:

- Left Pane (Tree View):** Shows a hierarchical folder structure under 'DorisWeb'. The selected folder is '1.01.01 Allgemein'. Other folders include '1 Verfassung', '1.01 Bund, Land, Kreis', '1.01.02 Bund', '1.01.03 Land', '1.01.04 Landschaftsverband', '1.01.05 Bezirksregierung', '1.01.06 Kreis (Einladungen Kreistag, Bekanntgabe)', '1.01.07 Funktionalreform Kommunale Neugliederung', '1.02 Bestimmungen für die Gemeinde', '1.03 Rat', '1.04 Hauptgemeindebeamte/Hauptverwaltungsbeamte', '1.05 Gemeindevorstand', '1.03.01 Allgemeine Vorschriften Rat', '2 Kassen- und Rechnungsprüfung', '3 Hauptverwaltung', '4 Einrichtungen für Verwaltungsangehörige', '5 Einrichtungen der Hauptverwaltung', '6 Besondere Dienststellen der Allg. Verwaltung', '7 Dienststellen der allg. Kriegsfolge', '8 Kommunale Interessenverbände', '9 Datenschutz', 'Process Handling', 'Initiated Processes', 'Trash', 'My Resubmission all', 'Resubmission tomorrow', 'Resubmission till today', 'Resubmission all', 'Standard Query', 'Extended Query', and 'Saved Queries'.
- Right Pane (List View):** Shows search results for the selected folder. The title is 'Search Results 1 - 6'. Below the title is a table with two columns: 'Reference Number' and 'File Content'. The table contains the following data:

Reference Number	File Content
1.01.01-12-1	Projektplanung und Durchführung
1.01.01-5	Neustrukturierung Ausbau Mummelsee
1.01.01-21-1	Ausstellung Österreich
1.01.01-12	Genehmigte Bestellungen für Verwaltung
1.01.01-1	Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle
1.01.01-123	Bestellungen für Verwaltung : Gesamtübersicht

 Below the table, there is another section titled 'Search Results 1 - 6' with a similar table structure, but it is currently empty.

At the bottom of the browser window, the text 'DoRIS® Document management and business process management DoRIS Webclient 7.0.32 Revision 1.300' is visible on the left, and the 'HAESSLER' logo is on the right.

Main screen with folders in the tree view (left side) and its results shown in the list view (right side)

Folders of the Main Screen

Here you get relevant information of the folders of the tree view and their application.

folder	In this folder you find...
Filing Plan	... the filing structure of your registry on different levels. The structure is administrated by the module DoRIS® Structured Storage and customized to your specific needs.
Process Handling	... all process files for which you are next in charge in the workflow. The whole workflow is visible in tab "Process File".
Initiated Processes	... all process files, that you have initiated by yourself.
Trash	... removed documents, files and process files. You can recover or finally delete these records, presumed you have the according rights.
Resubmission	... all documents, files and process files for which a resubmission is appointed. A resubmission is generated in tab "Order" of documents and files.
Different resubmission folders are described as follows	The resubmission folders differ in date of resubmission and in the person responsible – for all users or for you (as My Resubmission).
My Resubmission – till today	... all documents, files and process files for which a resubmission until today's date is appointed for you .
My Resubmission – today	... all documents, files and process files for which a resubmission with today's date is appointed for you .
My Resubmission – till tomorrow	... all documents, files and process files for which a resubmission until tomorrow's date is appointed for you .
My Resubmission – tomorrow	... all documents, files and process files for which a resubmission with tomorrow's date is appointed for you .
My Resubmission - total	... all documents, files and process files for which a resubmission is appointed for you .
Resubmission – till today	... all documents, files and process files for which a resubmission until today's date is appointed.
Resubmission – today	... all documents, files and process files for which a resubmission with today's date is appointed.
Resubmission – till tomorrow	... all documents, files and process files for which a resubmission until tomorrow's date is appointed.
Resubmission – tomorrow	... all documents, files and process files for which a resubmission with tomorrow's date is appointed.
Resubmission – total	... all documents, files and process files for which a resubmission is appointed.
Standard Query	... the results of your performed standard query.
Extended Query	... the results of your performed extended query.
Saved Query	... queries saved by yourself and queries saved and released to you by another user.












NOTE

Note to **My Resubmission** in upper table

My Resubmission contains all files, documents and process files, which display in table **Resubmission Order** of the tab "Order" the appropriate date and the according user (in this case: you) as registrar.

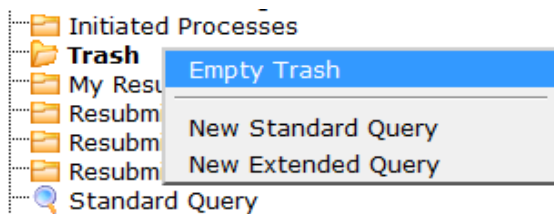
Icons and their Functions of Database Screen

Applying following icons you can deploy often used functions. Right-click opens a menu with these functions, too.

Icon	Function
	create new file
	create new process file
	perform standard query
	perform extended query
	edit list of deputies
	link to webpage of DoRIS
	DoRIS help
	opens DoRIS Administration
	modify result
	change password
	log out

Context Menu

With right click you open the context menu of often used functions. Depending on the position of the pointer you can open different menus: for example, in the tree view of the database mark **Trash** and you can directly empty it.



Example of a context menu of the list view

List View

The list view (right side) of the main screen displays either results of any query or the content of a folder chosen in the tree view (initial level of the filing plan).


Search Results 1 - 6

Reference Number	File Content
1.01.01-12-1	Projektplanung und Durchführung
1.01.01-5	Neustrukturierung Ausbau Mummelsee
1.01.01-21-1	Ausstellung Österreich
1.01.01-12	Genehmigte Bestellungen für Verwaltung
1.01.01-1	Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle
1.01.01-123	Bestellungen für Verwaltung : Gesamtübersicht

Search Results 1 - 6

Example of a list of results

note

Customize the list view by yourself in order to meet your own needs: either select an already existing view by right click on the table header or create a new view  (see Managing Views of FoldersManaging Views of p. 142)

Sorting the List of Results

At the top of the table click on the column header, this should be sorted for. The elements are sorted upwards, and marked with a red arrow pointing upwards. Repeated clicking over the arrow will inverse the sorting order.

For other sorting possibilities please see Sorting p. 97.

DORIS® BASICS: FILING PLAN, FILE, DOCUMENT, PROCESS FILE

Filing Plan as Electronic Directory Structure

The electronic filing plan corresponds to the already available and used filing plan. This filing plan should be valid for all organizational units in order to register and file all records with DoRIS®.

DoRIS® Records

DoRIS® records comprise of electronic files, electronic documents and electronic processes files.

Electronic File

The electronic file is the logical layout of your filing-application and it is comparable to a document folder. Indeed, an electronic file is like a paper file with documents enclosed. These documents are filed using the same generic term (e.g. department, reference number, subject etc.) though may differ in content or reference. With these metadata it is very easy to find files.

Electronic Document

Electronic documents are comparable to original documents in either paper or electronic form. They are clearly assigned to electronic files. You can access any scan of the original document (called image) as well as edit it electronically.

Electronic Process File

Electronic process files project business processes within DoRIS®. Before you start a process file you have to define different steps of a workflow, like recipients, date, and action or give additional information. A process file may -though need not- be assigned to a file number. You also may attach different documents to a process file. Once you initiate a process it will be forwarded along the defined workflow. Each action is logged and therefore precisely traceable. The process file is completed once a special action, like “file away” or “put on file”, is chosen.

DORIS® FILES

On the initial level of the filing plan in the tree view of the database you find DoRIS® files, displayed in the list view on the right side of the screen. To open any file, just click in the list view the file of interest and a pop up window shows its data, organized in different tabs.

File 1.01.01-1 Nr. 99359 - Mozilla Firefox

localhost/webclient/cust/doris/DA/jsp/index.jsp?View=ListView&RowNumber=99359&ResultSetId=183ec44&QName=Query

File 99359

File Documents Order Release Status Archiving Process File Message

Reference Number

Reference Number 1.01.01-1

File Number 1.01.01

Additional

Serial No. 1

File

Content Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle

Comment Für Projekt 4711

Location Buchhaltung, Schrank-B

Notes Projektablage

Access KL1

Capture Date 07.07.2006

Paper File

Structure of DoRIS® Files

Reference Number

Whenever you create a new file, it is mandatory to determine a reference number!












The reference number of a file is composed of fixed and variable numbered characteristics of your organization.

It comprises of File Number, Serial Number, Year and three arbitrary fields, e.g. department.

If a new file is created, its reference number is automatically generated and displayed in tab "File".

Icons and their Functions of File-Screen

Applying these icons you have direct access to often used functions.

Icon	Function
	unlock file, before you can edit a file, it needs to be unlocked
	save file
	remove file into trash
	copy file
	new document for selected file
	print file
	Show previous record
	Show next record
	show database screen
	PDF-Export of file
	close file


Overview of Tabs

Select any file and its detailed information are shown in a pop up window.

The information is structured in different tabs, of which the following are available:

- File
- Documents
- Order
- Release
- Status
- Archiving
- Process File
- Message

NOTE

Saved DoRIS® records are locked for (unintended) changes. If you want to edit any file, you have to unlock  first.

Following screenshots are shown in unlocked state.

Tab File

In tab "File" the reference number and its related figures, like file number and additional characters, are displayed. You also receive further information about the file regarding its Content, Location or the Access. The default setting of the field Capture Date is the date you created the file (current date).

The screenshot shows a web browser window with the title "File 1.01.01 00200200 - Mozilla Firefox". The address bar shows the URL "http://localhost/webclient/cust/doris/DA/jsp/index.jsp?RowNumber=99359". The page title is "File 99359". The browser's toolbar includes icons for home, back, forward, search, print, and PDF. Below the browser window, the "File" tab is active, showing a menu with "File", "Documents", "Order", "Release", "Status", "Archiving", "Process File", and "Message". The main content area is divided into two sections: "Reference Number" and "File".

Reference Number	
Reference Number	1.01.01-1
File Number	1.01.01
Additional	
Serial No.	1

File	
Content	Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle
Comment	Für Projekt 4711
Location	Buchhaltung, Schrank-B
Notes	Projektablage
Access	KL1
Capture Date	07.07.2006
Paper	<input checked="" type="checkbox"/>

Fertig

Tab File

Tab Documents

In tab "Documents" you will find a list view of corresponding documents of the selected file. You can directly display the attached documents: just use the icon in column "O" or "T".

New documents can be generated or added by "Drag&Drop".

The screenshot shows a web browser window titled "File 1.01.01 00200200 - Mozilla Firefox" with the URL `http://localhost/webclient/cust/doris/DA/jsp/index.jsp?View=ListView&RowNumber=99359&ResultSetId=c7c82a&QName=Query`. The page title is "File 99359". The interface includes a navigation bar with tabs: "File", "Documents" (selected), "Order", "Release", "Status", "Archiving", "Process File", and "Message".

Below the navigation bar, there is a section for "Search Results 1 - 4" with a dropdown menu set to "10". The search results are displayed in a table:


Date	Document Content	Sender	Reference Number	Rownumber	O	T
07.07.2006	Rechnung Printus	Printus	1.01.01-1	99363		
07.07.2006	Rechnung SFBA	SFBA	1.01.01-1	99362		
07.07.2006	Rechnung DIP-Digital-Print	Frau Löffler	1.01.01-1	99361		
07.07.2006	Rechnung Verlag C.H.Beck	Herr Beck	1.01.01-1	99360		

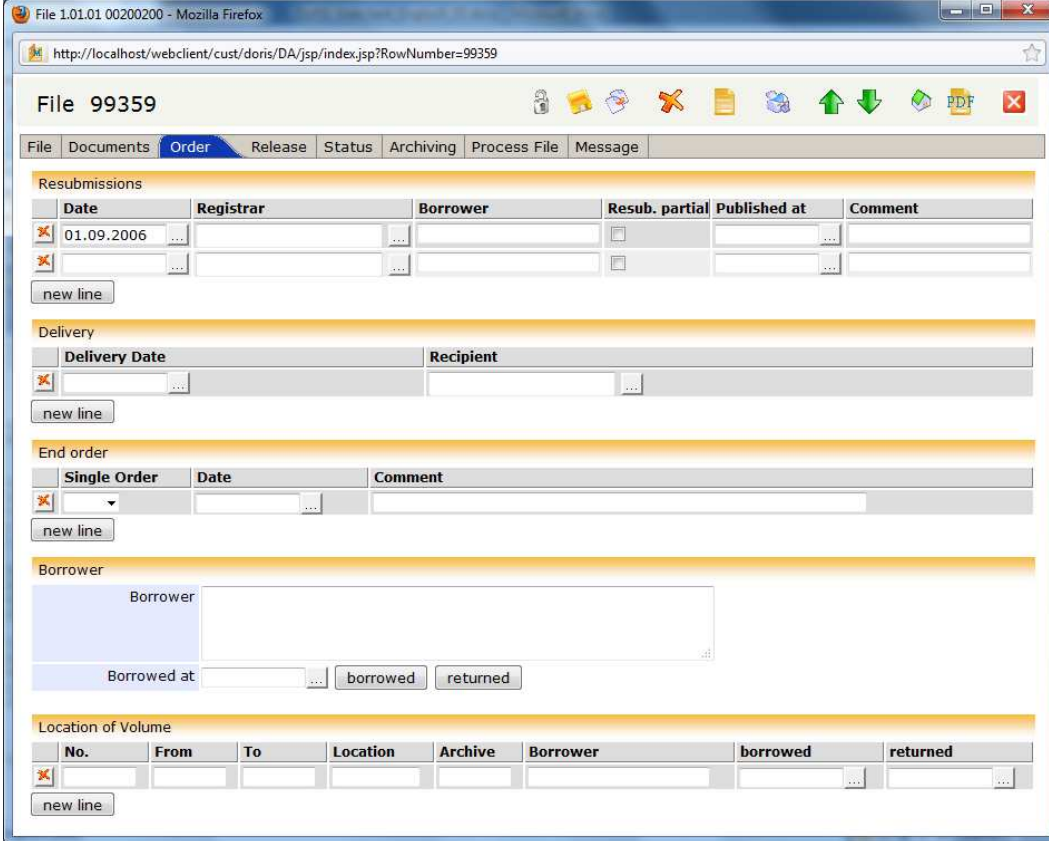
Below the search results, there is another "Search Results 1 - 4" section with a dropdown menu set to "10".

The "New Document" section is titled "Create new documents by Drag & Drop". It features a table with columns: "Name", "Size", "Path", "Link", and "Add". The table is currently empty and displays "Drag & Drop" in the center. Below the table is a progress bar showing "0%". To the right of the table are buttons: "Add", "Remove All", "Application", and "Cancel".

Tab Documents

Tab Order

In tab "Order" resubmissions, orders, and location of volume are organized. Due to the function of the table, more than one date for resubmission is possible. Depending on your input, the file is automatically listed in the corresponding folder of resubmission and therefore easily accessible. Settled listings can be deleted .



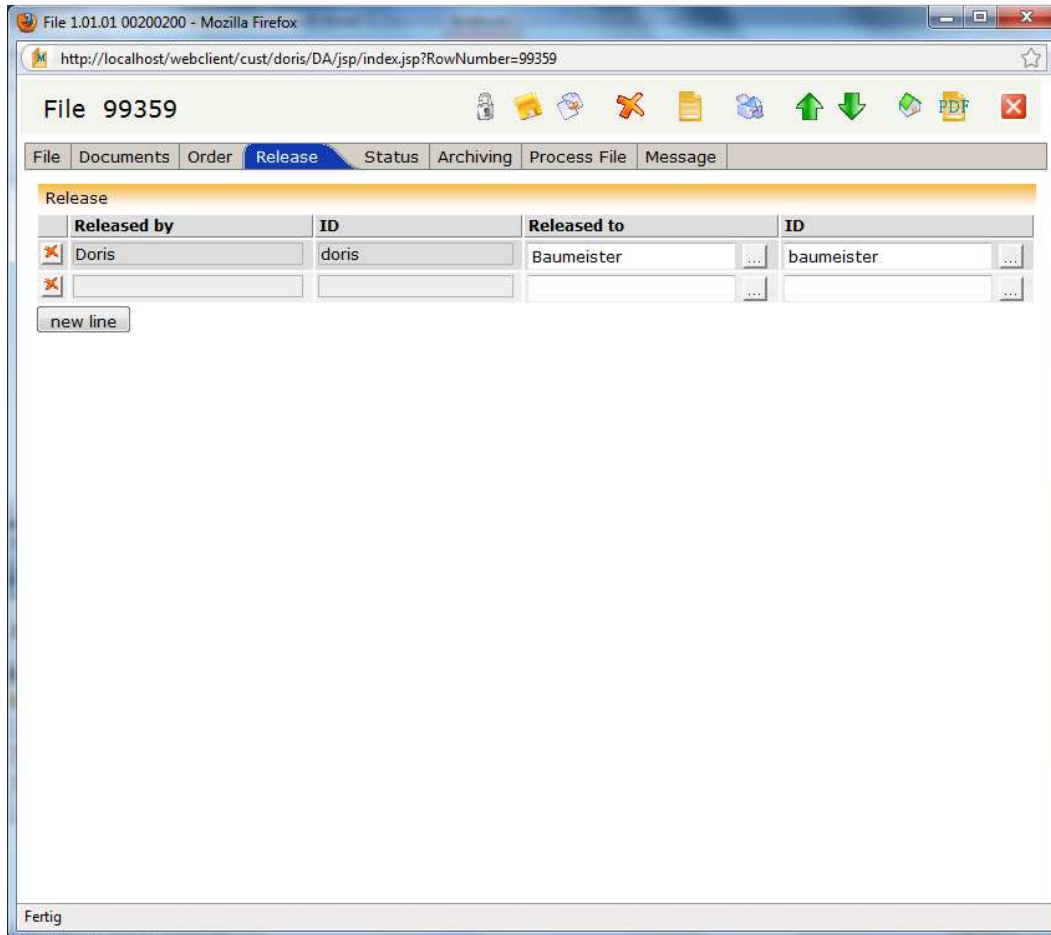
The screenshot shows a web browser window with the URL `http://localhost/webclient/cust/doris/DA/jsp/index.jsp?RowNumber=99359`. The page title is "File 99359". The interface is organized into several sections, each with a table and a "new line" button:

- Resubmissions:** A table with columns: Date, Registrar, Borrower, Resub. partial, Published at, Comment. The first row contains the date "01.09.2006".
- Delivery:** A table with columns: Delivery Date, Recipient.
- End order:** A table with columns: Single Order, Date, Comment.
- Borrower:** A form with a "Borrower" text input field, a "Borrowed at" date input field, and "borrowed" and "returned" buttons.
- Location of Volume:** A table with columns: No., From, To, Location, Archive, Borrower, borrowed, returned.


Tab Order

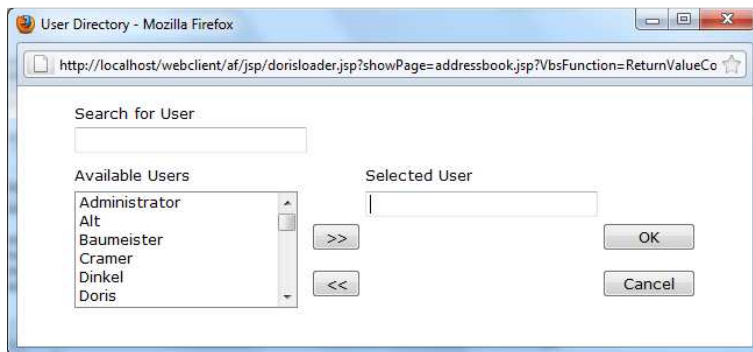
Tab Release

In tab "Release" you will find a list of given access rights regarding the selected file. You could also enter new releases for the file: enter the user name you want to release the document to in column Released to. The corresponding ID as well as your user name and ID are automatically completed in the relevant fields.



Tab Release

You could either type in the user name or select it from the user directory 



User Directory

Select the user you want to permit access to the file from the directory list **Available Users**. If a user was previously selected, its username will already be displayed in the field **Selected User**.

Data of release may also be entered automatically – in this case a workflow was installed: column **Released by** shows *Vorgang* (Process File) and column **ID** an alphanumeric code.

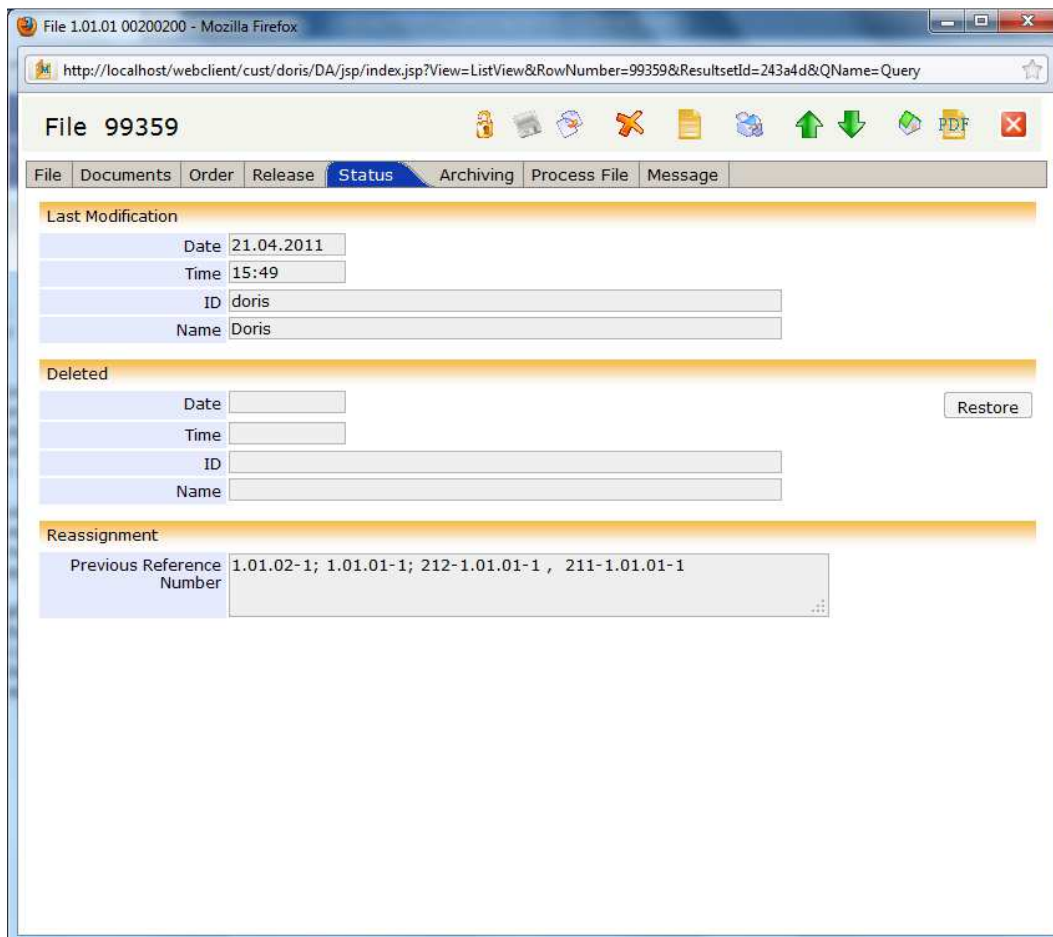
Released by	ID	Released to	ID
Vorgang	1E57B4B07C9411DB904	System-Administrator	sa
Vorgang	1E57B4B07C9411DB904	Gabler Friedrich	gabua09
Vorgang	1E57B4B07C9411DB904	Tigges Dieter	tigua09

new line

Tab Status

Tab "Status" provides information of changes in state of the selected file:

- Last Modification – when was the file changed by whom?
- Deleted – when was the file removed into Trash by whom?
- Reassignment – the previous reference number is displayed.



The screenshot shows a Mozilla Firefox browser window displaying the 'Status' tab for file 99359. The browser address bar shows the URL: `http://localhost/webclient/cust/doris/DA/jsp/index.jsp?View=ListView&RowNumber=99359&ResultSetId=243a4d&QName=Query`. The page title is 'File 99359'. The 'Status' tab is active, and the content is organized into three sections: 'Last Modification', 'Deleted', and 'Reassignment'. Each section contains input fields for Date, Time, ID, and Name. The 'Reassignment' section also includes a text area for 'Previous Reference Number' containing the text '1.01.02-1; 1.01.01-1; 212-1.01.01-1, 211-1.01.01-1'. A 'Restore' button is visible in the 'Deleted' section.

Last Modification	
Date	21.04.2011
Time	15:49
ID	doris
Name	Doris

Deleted	
Date	<input type="text"/>
Time	<input type="text"/>
ID	<input type="text"/>
Name	<input type="text"/>

Reassignment	
Previous Reference Number	1.01.02-1; 1.01.01-1; 212-1.01.01-1, 211-1.01.01-1

Tab Status

Tab Archiving

In tab "Archiving" you determine the information about selection and archiving. The default setting of some fields is according to the guidance of your organization, which was already determined in **DoRIS® Structured Storage**.

The additional feature **DoRIS® 7.0 Archive Assistant** helps to keep your data pool lean. You will find read-only information of changes and archiving in the gray-colored fields. After reassignment of a file it is traceable by the **Legacy Reference Number**. In section **Legacy Data** you find information about import of data from other systems.

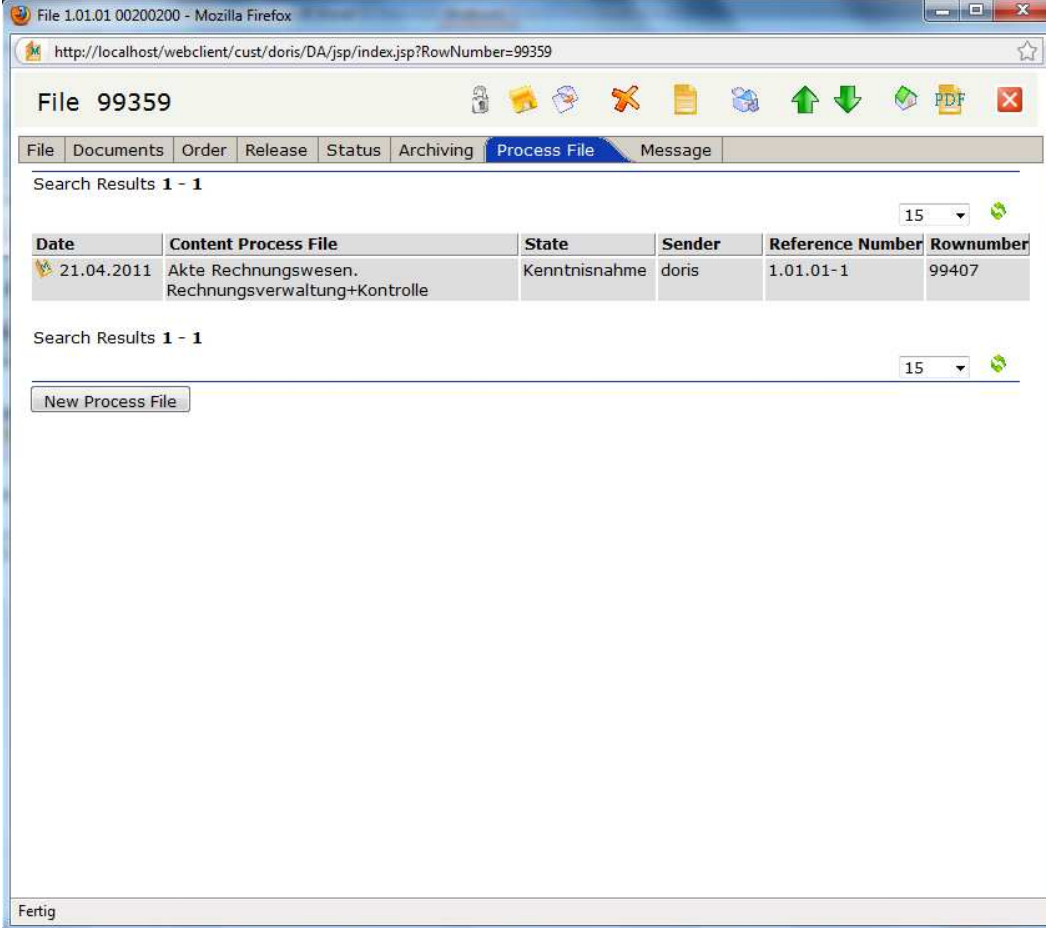
The screenshot shows a web browser window with the URL `http://localhost/webclient/cust/doris/DA/jsp/index.jsp?RowNumber=99359`. The page title is "File 99359". The "Archiving" tab is selected in the navigation menu. The form contains several sections:

- Archive Data:** Includes input fields for "Start of Term", "End of Term", "Retention (Years)" (set to 5), "Retention to" (set to 2011), "Volume numbers", and "Serial No." (set to 0). There is also a large text area for "Archive numbers".
- State:** Includes "Archive State" (set to "No entry (N)"), "Continuation" (checkbox), and "Mask Out" (checkbox).
- Selection:** Includes "Archive No.", "Supplemental Character", and "Valuation State" (all in grayed-out input fields).
- Legacy Data:** Includes "EDP No." and "Legacy Reference Number" (both in grayed-out input fields).

Tab Archiving

Tab Process File

In tab "Process File" you find a list of all corresponding process files of the selected file. You can either navigate in this list or create new process files [New Process File](#).



The screenshot shows a web browser window with the address bar displaying `http://localhost/webclient/cust/doris/DA/jsp/index.jsp?RowNumber=99359`. The page title is "File 99359". The navigation menu includes "File", "Documents", "Order", "Release", "Status", "Archiving", "Process File", and "Message". The "Process File" tab is active, showing search results for "1 - 1" items. A table lists the process files:

Date	Content Process File	State	Sender	Reference Number	Rownumber
21.04.2011	Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle	Kenntrnisnahme	doris	1.01.01-1	99407

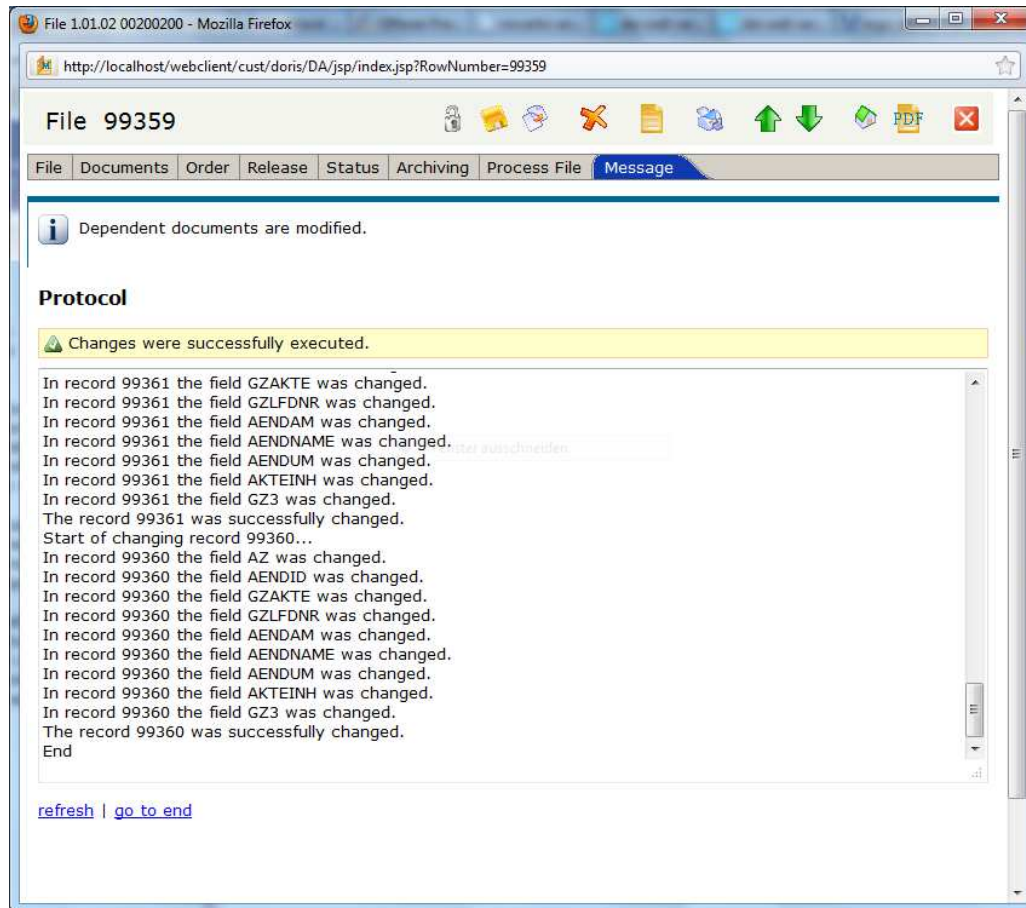
Below the table, there is another search results section for "1 - 1" items and a "New Process File" button. The status bar at the bottom indicates "Fertig".

Tab Process File

Tab Message

It may occur that the assignment of a file in the filing plan has to be changed or data of existing files have to be edited (see Editing and Completing File Data p. 33).

In tab "Message" each step is logged and the protocol is shown until the file is closed.



Tab Message




Creating Files

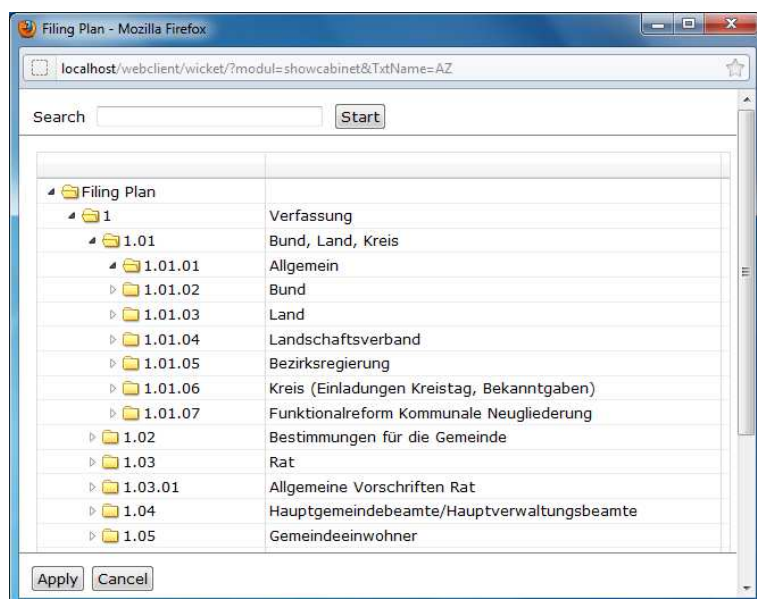
There are two ways of creating new files: with or without navigation in the filing plan

note

- Blue-framed fields are mandatory fields!
- For navigation between fields you can either use the keys Tab and Shift+Tab or directly select a field.

Creating new Files Without Navigation in the Filing Plan

1. In the tree-view of the database, open a new file .
2. A pop-up window for the new file, which is still unassigned to any file number in the filing plan, is shown.
3. Enter the file number in **File Number** or browse within the filing plan : Navigate in the structure or search for a specific description within the filing plan. Either apply the wanted file number by double click or using the icon .



4. Describe the **Content** of the file.
5. If applies, enter more data into the available fields and tabs.
6. The default setting of the field **Capture Date** is the date you created the file, though could be changed any time.

File 1.01.01 (new) - Mozilla Firefox

http://localhost/webclient/cust/doris/DA/jsp/index.jsp?RowNumber=0

File New

File Documents Order Release Status Archiving Process File Message

Reference Number

Reference Number

File Number

Additional

Serial No.

File

Content

Comment

Location

Notes

Access

Capture Date

Paper

Fertig

New File

Creating new Files With Navigation in the Filing Plan

1. In the tree-view of the database choose the folder "Filing Plan". Navigate to the needed order criteria and therefore to the corresponding file number.
2. Mark the required level and open a new file 📁.

The screenshot shows the DoRIS Webclient interface in a Firefox browser. The left pane displays a tree view of the database structure under "DorisWeb". The "Filing Plan" folder is expanded, showing a hierarchy of folders including "1.01 Bund, Land, Kreis", "1.01.01 Allgemein", "1.01.02 Bund", "1.01.03 Land", "1.01.04 Landschaftsverband", "1.01.05 Bezirksregierung", "1.01.06 Kreis (Einladungen Kreistag, Bekanntgabe)", "1.01.07 Funktionaleform Kommunale Neugliederung", "1.02 Bestimmungen für die Gemeinde", "1.03 Rat", "1.04 Hauptgemeindebeamte/Hauptverwaltungsbeamte", "1.05 Gemeindeeinwohner", "1.03.01 Allgemeine Vorschriften Rat", "2 Kassen- und Rechnungsprüfung", "3 Hauptverwaltung", "4 Einrichtungen für Verwaltungsangehörige", "5 Einrichtungen der Hauptverwaltung", "6 Besondere Dienststellen der Allg. Verwaltung", "7 Dienststellen der allg. Kriegsfolge", "8 Kommunale Interessenverbände", "9 Datenschutz", "Process Handling", "Initiated Processes", "Trash", "My Resubmission all", "Resubmission tomorrow", "Resubmission till today", "Resubmission all", "Standard Query", "Extended Query", and "Saved Queries".

The right pane shows a "List View" of search results. The search criteria are "TreeView%2FAktenplan%2F1%2F1.01%2F1.01.01&Act=Aktenplan%2F1%2F1.01.01&". The results are displayed in a table with two columns: "Reference Number" and "File Content".

Reference Number	File Content
1.01.01-12-1	Projektplanung und Durchführung
1.01.01-5	Neustrukturierung Ausbau Mummelsee
1.01.01-21-1	Ausstellung Österreich
1.01.01-12	Genehmigte Bestellungen für Verwaltung
1.01.01-1	Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle
1.01.01-123	Bestellungen für Verwaltung : Gesamtübersicht

At the bottom of the interface, the text "DoRIS® Document management and business process management DoRIS Webclient 7.0.32 Revision 1.300" is visible.

Tree view of database with folder Filing Plan opened

File 1.01.01 (new) - Mozilla Firefox

http://localhost/webclient/cust/doris/DA/jsp/index.jsp?RowNumber=0

File New

File Documents Order Release Status Archiving Process File Message

Reference Number

Reference Number

File Number 1.01.01

Additional

Serial No.

File

Content

Comment

Location

Notes

Access KL1

Capture Date 21.04.2011

Paper

Fertig


3. The new created file is opened and the file number of the selected level is automatically assigned to it; shown in the field **File Number**.
4. Enter the information that meet your needs in the appropriate fields of the different tabs, considering the field **Content** as mandatory.

note

Whenever you open a certain level in the file structure, the displayed files in the list view are as well assigned to this level as you have access rights for these files.

Thus, before you create a new file  you have to select the required level in the file structure.

Saving New Created File

To prevent loss of data either save  your data input to a new file or save your changes of an existing file.

If you missed filling in a mandatory field, DoRIS will ask you to enter the missing data. Afterwards you have to save again.



A mandatory field is empty. Please complete the missing information.



Editing and Completing File Data

Cases may occur when you have to edit data of existing files, e.g. during a borrowing process.



note

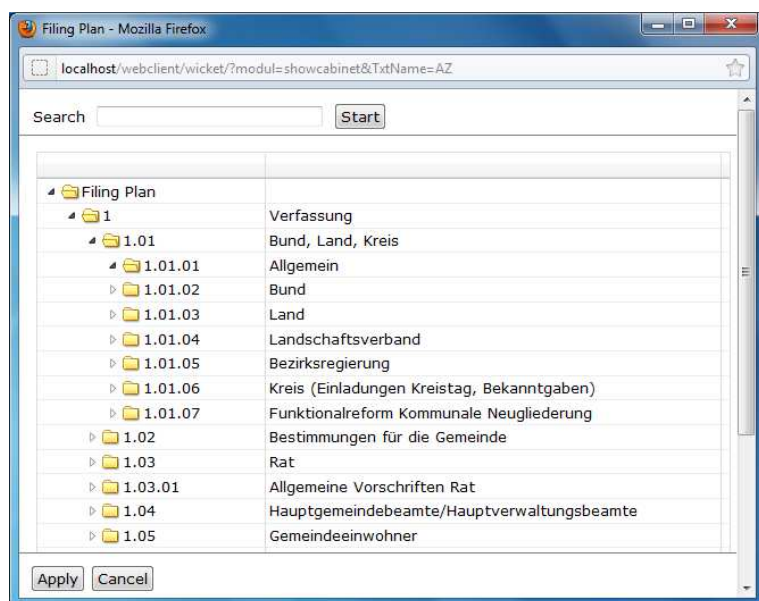
According to your authorization you have or have not the right to edit each field.
If you need any help, please ask you system-administrator.



Would you like to change the description of the file-content?

1. Open the file.
2. Unlock the file .
3. Choose the according field and make your changes.
4. Save your changes .

Would you like to change the assignment of a file?

1. Open the file.
2. Unlock the file .
3. In tab "File" open the filing structure  (behind File Number).
A pop-up window displays the filing structure.



4. Select the file level in order to determine the new file number and thereby assign the file to the corresponding file number. Double-click on this level or .
5. Save your changes .

note

If the file includes any documents, each step of the reassignment is recorded and the protocol is shown in tab "Message" until the file is closed.

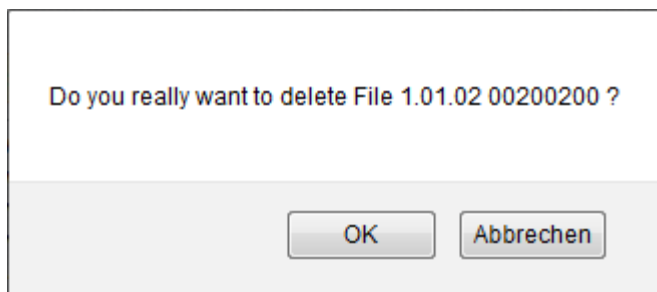
Deleting Files

Would you like to remove files into **Trash**? However, these files must not comprise any documents; otherwise you have to delete them first. Files which are located in **Trash** can be restored or permanently removed by authorized users only (in any case: system-administrator).

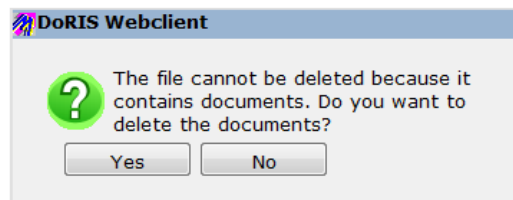
In the feature **DoRIS® User Management** the individual authorization levels are administrated and you may ask your system-administrator for the according rights, if needed.


How to remove files into **Trash**:

1. Open the file.
2. Unlock the file .
3. Remove the file into **Trash** .
4. Once you confirmed the action , this file is removed into **Trash**.






5. If there are still documents assigned to the selected file, they will be deleted within the process of deletion by confirming the following message.

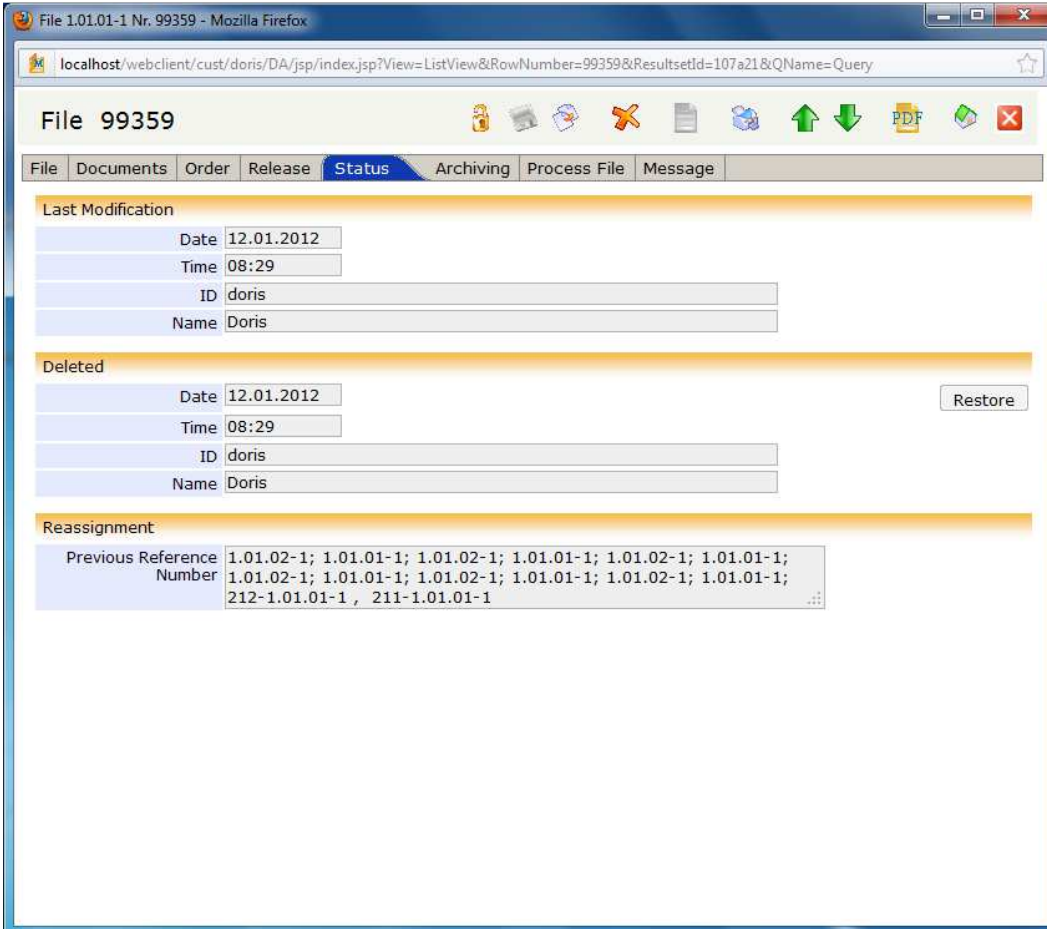


6. Afterwards remove the file into **Trash** .

Restoring Files

You need to restore files from Trash?

1. You need specific rights to restore files from Trash.
2. Select the files in Trash.
3. Open the files with a single click.
4. Unlock file .
5. Change to tab "Status".
6. In section "Deletion", restore the file from Trash. The information about deletion is erased.
7. Save your changes .
8. Close the file .



File 1.01.01-1 Nr. 99359 - Mozilla Firefox

localhost/webclient/cust/doris/DA/jsp/index.jsp?View=ListView&RowNumber=99359&ResultsetId=107a21&QName=Query

File 99359

File Documents Order Release **Status** Archiving Process File Message

Last Modification

Date	12.01.2012
Time	08:29
ID	doris
Name	Doris

Deleted

Date	12.01.2012	<input type="button" value="Restore"/>
Time	08:29	
ID	doris	
Name	Doris	


Reassignment

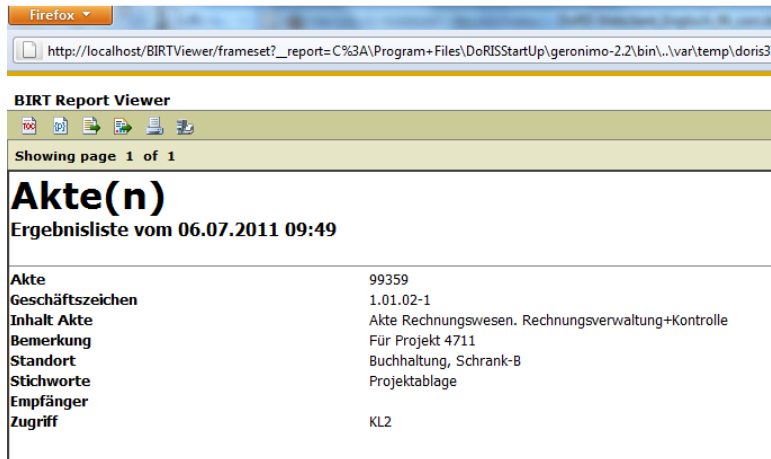
Previous Reference Number	1.01.02-1; 1.01.01-1; 1.01.02-1; 1.01.01-1; 1.01.02-1; 1.01.01-1; 1.01.02-1; 1.01.01-1; 1.01.02-1; 1.01.01-1; 1.01.02-1; 1.01.01-1; 212-1.01.01-1, 211-1.01.01-1
---------------------------	--

Tab Status

Printing Summary Page

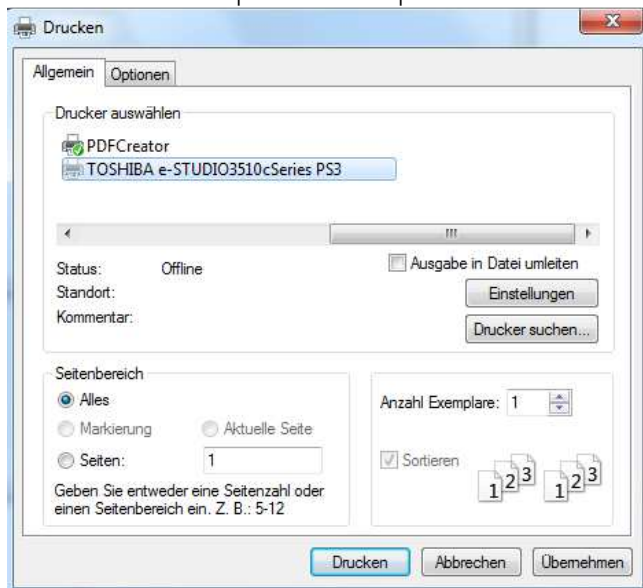
Do you want to print a summary page?

You can either use the icon  in the file view or right click on the file in the list view and select **print**. A pop-up window displays the print preview of the file.

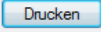



Print preview

You have different options for the print out.



Printing settings

Initiate the printing process  and you will receive a printout of the file at the selected printer. Close the application .

DORIS® DOCUMENTS


Structure of DoRIS® Documents

To open any DoRIS document go to tab "Document " of the corresponding file or select and open any document from the list of results of a standard query. After you opened a document its detailed information is shown in a pop up window.

The content of DoRIS® documents is organized in different tabs:

- Document
- Order
- Release
- Status
- Image
- Original
- Preview
- Process File
- Full Text

note

Saved DoRIS® records are locked for (unintended) changes. If you want to edit any document, you have to unlock  first.

Following screenshots are shown in unlocked state

note

DoRIS-Documents comprise 2 tabs regarding record-filing – Image & Original – and 2 tabs regarding its display – Preview & Full Text.

Depending on the kind of records, they are either attached in tab "Image" or tab "Original":

Originals are data-files (e.g. Word, Excel, Write etc.) or e-mail and are deposited on tab "Original".

However, image files (e.g. scanned records) are deposited on tab "Image".

Records that are deposited on tab "Original" are automatically converted by the so called ConvEx-Agent into the long-term storage format (pdf or tif). Thereby the record is a permanent part of an electronic file and can be read without the original application. In addition, the record is now shown on tab "Image".

DoRIS StartUp is not provided with the ConvEx-Agent; therefore, the originals are not automatically converted into the long-term storage format and displayed. The ConvEx-Agent can be subsequently supplemented

For the preview the records of tab "Image" are used.















Regarding DoRIS StartUp, you can only see scanned records or attached image-files on tab "Preview".

The full text of the long-term stored records is generated by the OCR- or ConvEx-Agent, depending on the image or text-file. This provides another query-option.

DoRIS StartUp is neither provided with the ConvEx-Agent nor with the OCR-Agent, both can subsequently be supplemented.


Icons and their Functions of the Document Screen

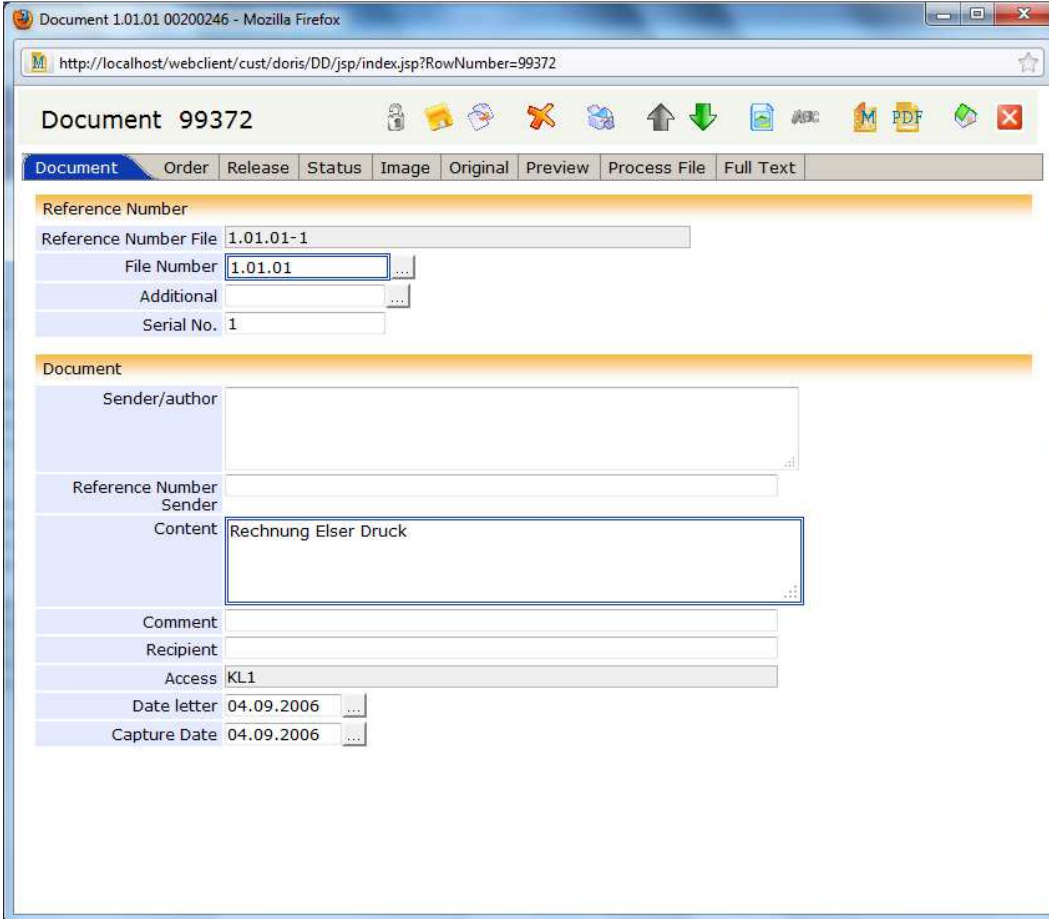
Applying these icons you have direct access to often used functions.

Icon	Function
	unlock document, before you can edit a document, it needs to be unlocked
	save document
	copy document
	remove document into trash
	print document
	show previous record
	show next record
	image application
	text application
	open corresponding original document
	show corresponding file
	PDF-Export of document
	show database screen
	close document

Tab Document

In tab "Document" the basic information of the document are displayed. If required you can change the entries anytime.

In case you may need to have an insight into the corresponding file, just open it  from this document view.



Document 1.01.01 00200246 - Mozilla Firefox

http://localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=99372

Document 99372

Document Order Release Status Image Original Preview Process File Full Text

Reference Number

Reference Number File 1.01.01-1

File Number 1.01.01

Additional

Serial No. 1

Document

Sender/author

Reference Number

Sender

Content Rechnung Elser Druck

Comment

Recipient

Access KL1

Date letter 04.09.2006

Capture Date 04.09.2006

Tab Document

Tab Order

Tab "Order" displays information about:

Resubmissions	information regarding electronic or paper records
Delivery	delivery date and recipient
End order	single order with date and comments
Borrower	information about the borrowing process
Available	like images, scans, paper documents etc.
Documents	

Depending on the settings, the document may also be classified "resubmission" in the tree view of the main screen (e.g. `resubmission till today`).

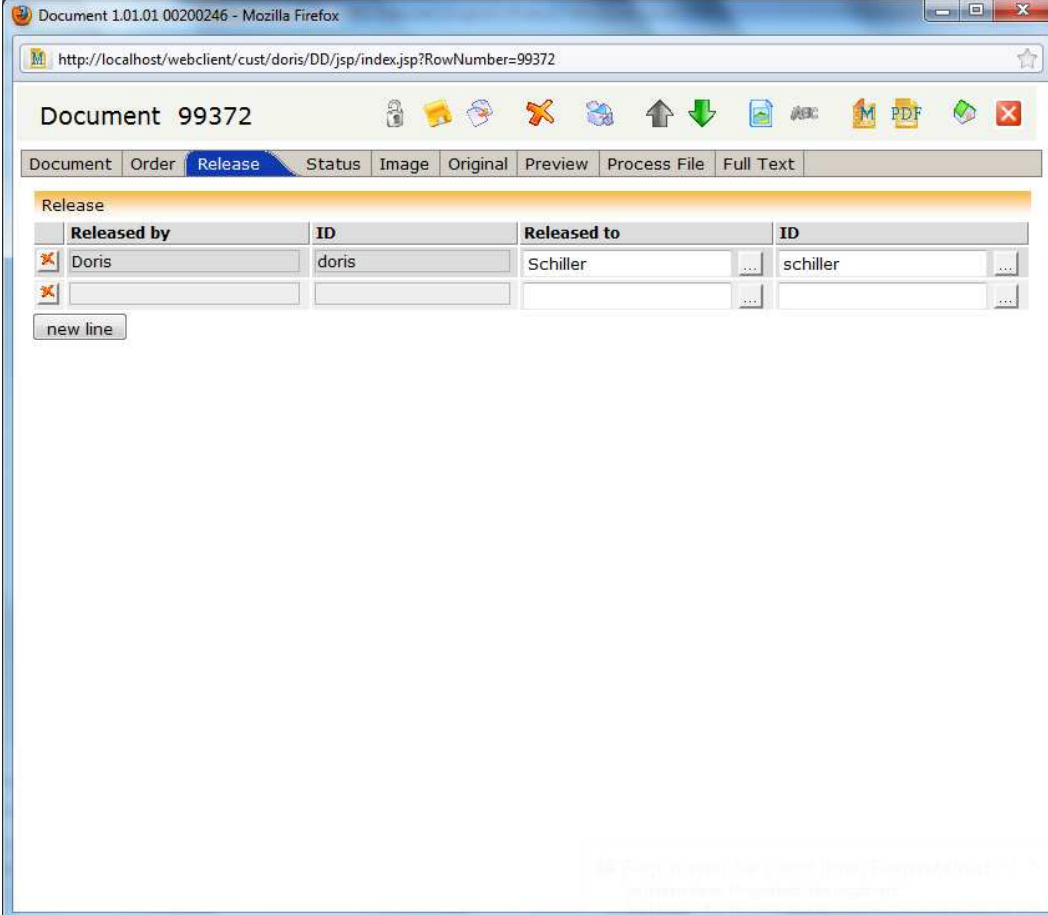
The screenshot shows the 'Order' tab in the DoRIS webclient for document 99372. The interface includes a navigation bar with tabs for Document, Order, Release, Status, Image, Original, Preview, Process File, and Full Text. The main content area is divided into several sections:

- Resubmissions:** A table with columns: Date, Registrar, Borrower, Resub. partial, Published at, and Comment. It includes a 'new line' button.
- Delivery:** Fields for Delivery date and Recipient, with a 'new line' button.
- End order:** Fields for Single order, Date, and Comment, with a 'new line' button.
- Borrower:** A large text area for Borrower, a 'Borrowed at' field, and 'borrowed' and 'returned' buttons.
- Existing documents:** A list of document types (Image input, Image scan, Paper document, Original file) with checkboxes, and fields for Barcode (00200246), Legacy Reference No., and Previous Reference No.

Tab Order

Tab Release

In tab “Release” you will find a list of given access rights regarding the selected document. You could also enter new releases for the document: enter the user name you want to release the document to in column Released to. The corresponding ID as well as your user name and ID are automatically completed in the relevant fields.




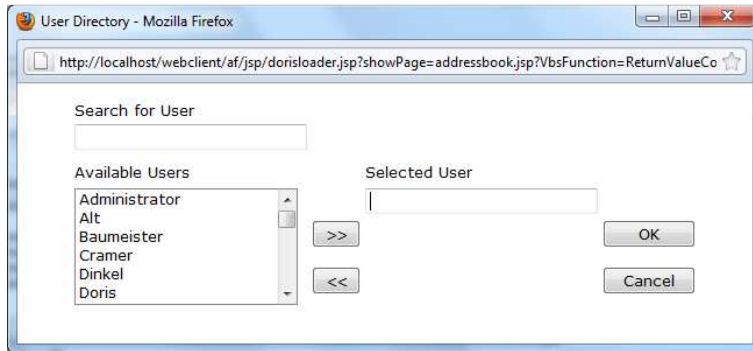
The screenshot shows a Mozilla Firefox browser window displaying the 'Release' tab for document 99372. The browser address bar shows the URL: `http://localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=99372`. The page title is 'Document 99372'. Below the title is a navigation menu with tabs: Document, Order, Release (selected), Status, Image, Original, Preview, Process File, and Full Text. The main content area is titled 'Release' and contains a table with the following structure:

Released by	ID	Released to	ID
Doris	doris	Schiller	schiller

Below the table is a 'new line' button. The bottom of the page contains a small copyright notice: '© 2007 by Universitäts- und Landesbibliothek Bonn. Alle Rechte vorbehalten. Dieses Dokument ist urheberrechtlich geschützt durch die Universitäts- und Landesbibliothek Bonn. Alle Rechte vorbehalten.'

Tab Release

You could either type in the user name or select it from the user directory 



User Directory

Select the user you want to permit access to the documents from the directory list **Available Users**. If a user was previously selected, its username will already be displayed in the field **Selected User**.

Data of release may also be entered automatically – in this case a workflow was installed: column **Released by** shows *Vorgang* (Process File) and column **ID** an alphanumeric code.

Released by	ID	Released to	ID
Vorgang	1E57B4B07C9411DB904	System-Administrator	sa
Vorgang	1E57B4B07C9411DB904	Gabler Friedrich	gabua09
Vorgang	1E57B4B07C9411DB904	Tigges Dieter	tigua09

Tab release

Tab Status

The tab "Status" provides you information about the status of the document:
When and by whom was the document scanned, changed, sealed, or removed?

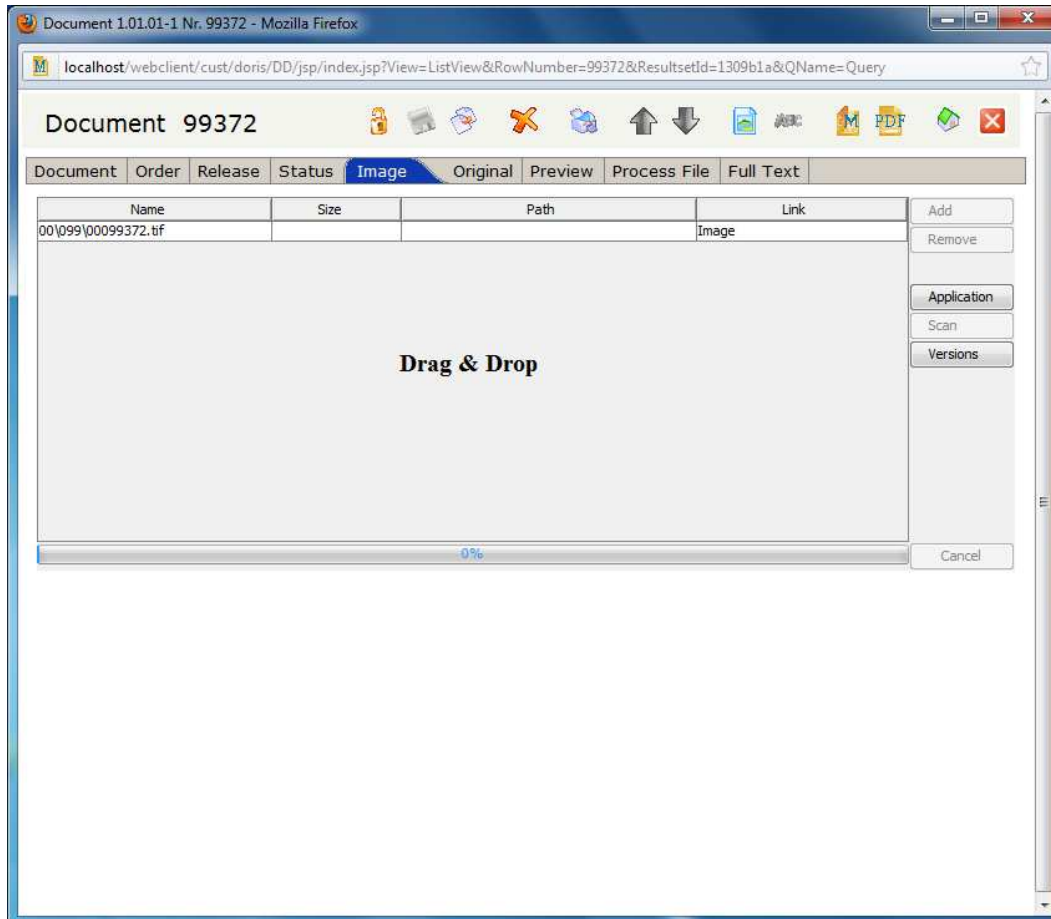
The screenshot shows a Mozilla Firefox browser window displaying the 'Status' tab for document 99372. The browser address bar shows the URL: `http://localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=99372`. The page title is 'Document 99372'. Below the title is a navigation menu with tabs: Document, Order, Release, Status (selected), Image, Original, Preview, Process File, and Full Text. The main content area is divided into four sections, each with a yellow header bar:

- Scanner Release:** Contains input fields for Date, Time, ID, and Name.
- Last Modification:** Contains input fields for Date (30.05.2011), Time (11:17), ID (doris), and Name (Doris).
- Sealed:** Contains input fields for Date, Time, ID, and Name, and a 'Seal' button.
- Deleted:** Contains input fields for Date, Time, ID, and Name, and a 'Restore' button.


Tab Status


Tab Image


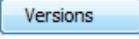
Tab "Image" displays either the scanned or attached image file that is saved in "long-term-storage" format, e.g. in PDF -format. To view any image file, just double click or start the appropriate application for displaying . Alternatively, look at the record using tab "Preview".

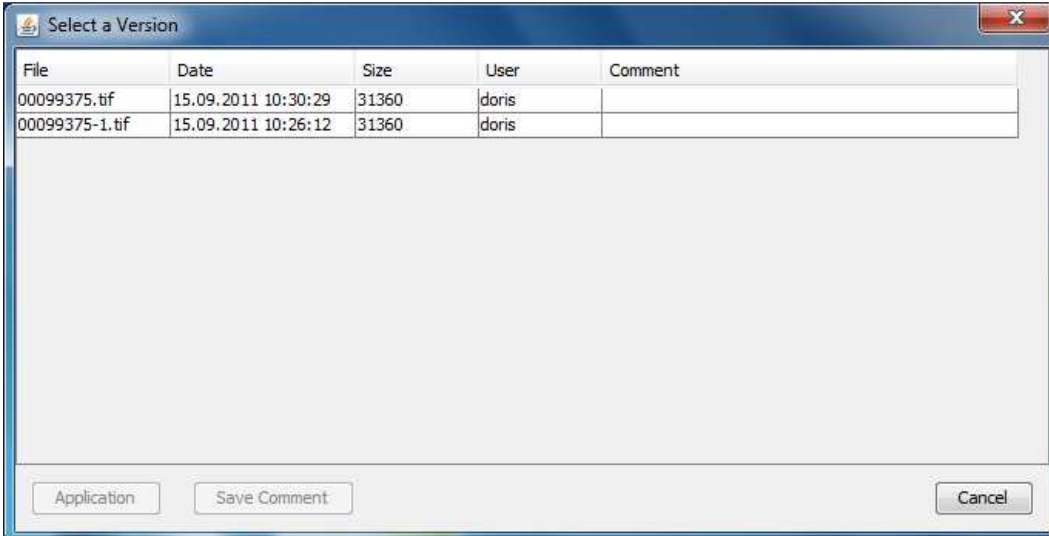


Tab Image

Once you unlock  the document you can attach or replace records. In Addition by the means of the feature “Drag & Drop” you can add data-files or copy them into a directory. In case a record is already attached on tab “Original” , you cannot attach further records on tab “Image” .

 The document contains an original file. Therefore, the image file cannot be attached.

If you want to exchange the record on tab “Image” , attach the new document e.g. by “Drag & Drop”. Once you save  the changes the records are exchanged. View the history of the formerly attached records  and if applies add comments to the different versions.



File	Date	Size	User	Comment
00099375.tif	15.09.2011 10:30:29	31360	doris	
00099375-1.tif	15.09.2011 10:26:12	31360	doris	

Application Save Comment Cancel


History of attached records in tab Image

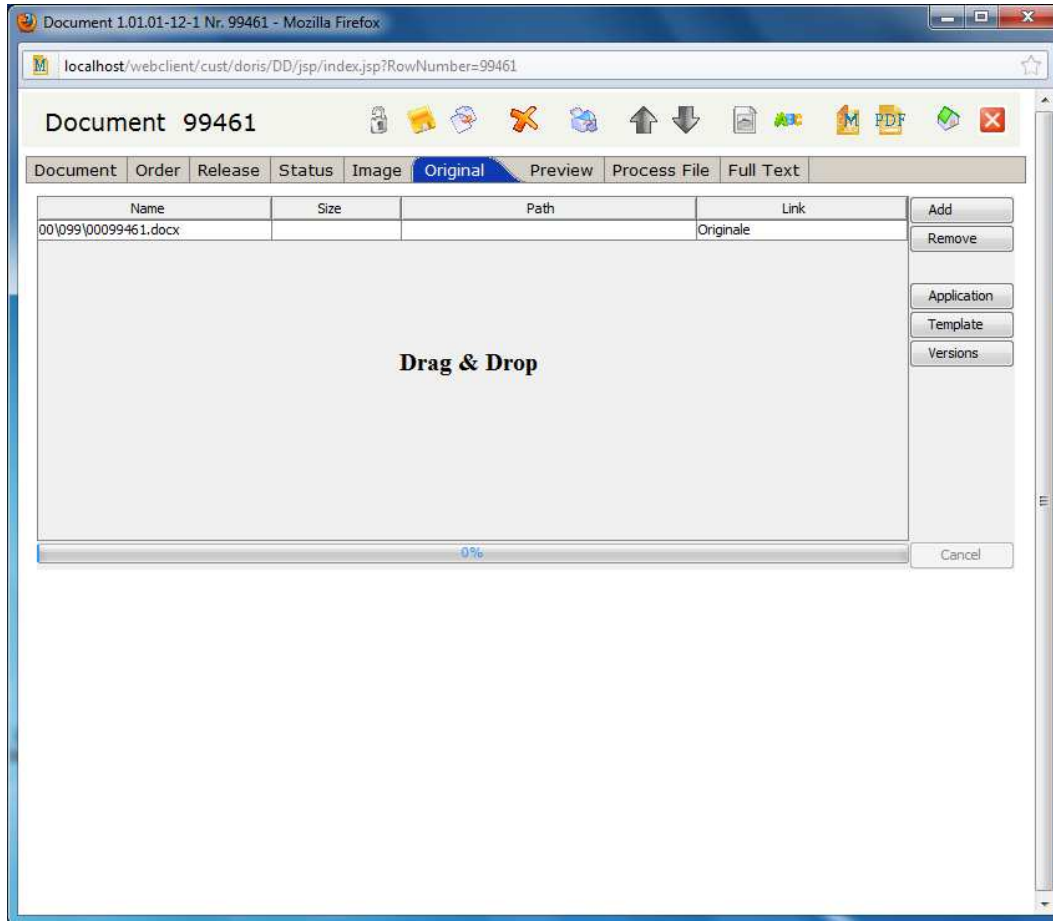
The administration of versions provides you a complete and non-manipulable list of all formerly (to this document) attached records.

Please note!


Please save the document and your activities will be effective.


Tab Original


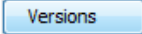
Originals of the document are deposited in tab "Original" as text files, e.g. Word. To view any original file, just double click or start the appropriate application for displaying .

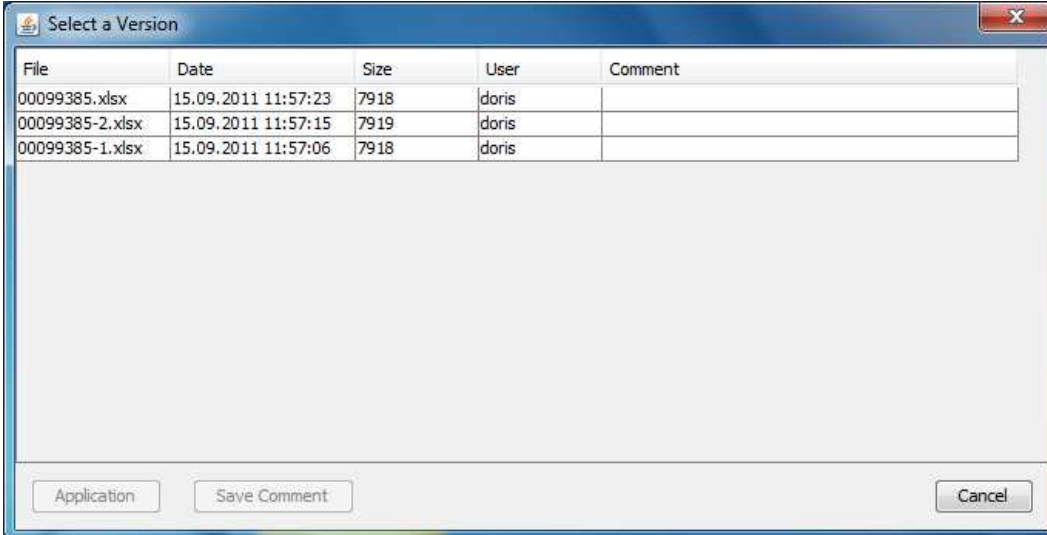


Tab Original

Once you unlock  the document you can attach or replace records. In Addition by the means of the feature “Drag & Drop” you can add -files or copy them into a directory.
In case a record is already attached on tab “Image” , you cannot attach further records on tab “Original”.

 The document contains one (eg, scanned) image file. Therefore, no original file can be added.

If you want to exchange the record on tab “Original” , attach the new document e.g. by “Drag & Drop”. Once you save  the changes the records are exchanged. View the history of the formerly attached records  and if applies add comments to the different versions.



File	Date	Size	User	Comment
00099385.xlsx	15.09.2011 11:57:23	7918	doris	
00099385-2.xlsx	15.09.2011 11:57:15	7919	doris	
00099385-1.xlsx	15.09.2011 11:57:06	7918	doris	

Application Save Comment Cancel

History of attached records in tab Original

The administration of versions provides you a complete and non-manipulable list of all formerly (to this document) attached records.

Please note!

Please save the document and your activities will be effective.

Tab Preview

Scanned documents that you can find in tab "Image" are shown in Tab "Preview".

Document 1.01.01 00200246 - Mozilla Firefox

http://localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=99372

Document 99372

Document Order Release Status Image Original **Preview** Process File Full Text

Kar: Elser Druck GmbH - Köllingweg 35 - 75417 Mühlacker
Tel. 07041/80541/49 - Fax 07041/80550 - e-mail: info@elserdruck.de - www.elserdruck.de

Karl Czei Druck GmbH - Postfach 100 - 75415 Mühlacker

Hässler
Informations GmbH
Mühlstraße 58
75328 Schomberg

**ELSER
DRUCK**

vorhandene Seiten:
1

Datum:
26.10.2005

RECHNUNG Nr.: 627831
Kunden-Nr.: 31817
Auftrags-Nr.: 12723

Ihre Bestellung: Herr Reuther

Objekt: Broschüren "Firmenprofil"
Format: 8,0 x 13,0 cm
Umfang: Umschlag 4 Seiten
Inhalt: 16 Seiten
Druck: 4/4 fbg. Skala
Material: 150 g/qm BVS-Plus matt
Verarbeitung: schneiden, falzen, einstecken. Rückenheftung, verpacken
Lieferdatum: 18.10.05

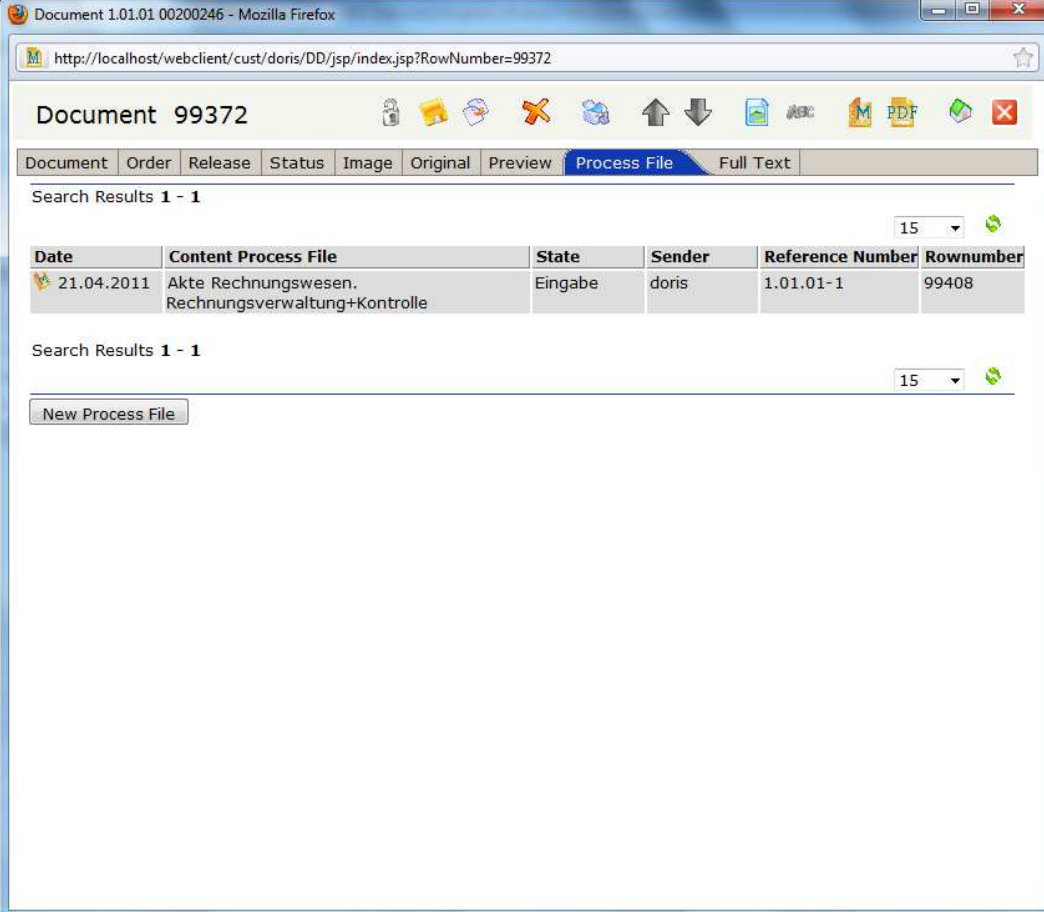
500	Stück	538,75 €
		538,75 €
	+ Mehrwertsteuer 16 %	88,20 €

Tab Preview

Tab Process File

Tab "Process Files" displays a list with all process files regarding this document. In this tab you can open a process file by clicking, navigate in this list or issue a new process file

[New Process File](#)



The screenshot shows a web browser window titled "Document 1.01.01 00200246 - Mozilla Firefox" with the URL "http://localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=99372". The page displays "Document 99372" and a navigation menu with tabs: Document, Order, Release, Status, Image, Original, Preview, **Process File**, and Full Text. Below the menu, there are two sections of "Search Results 1 - 1", each with a dropdown menu set to "15" and a refresh icon. The first search results section contains a table with the following data:

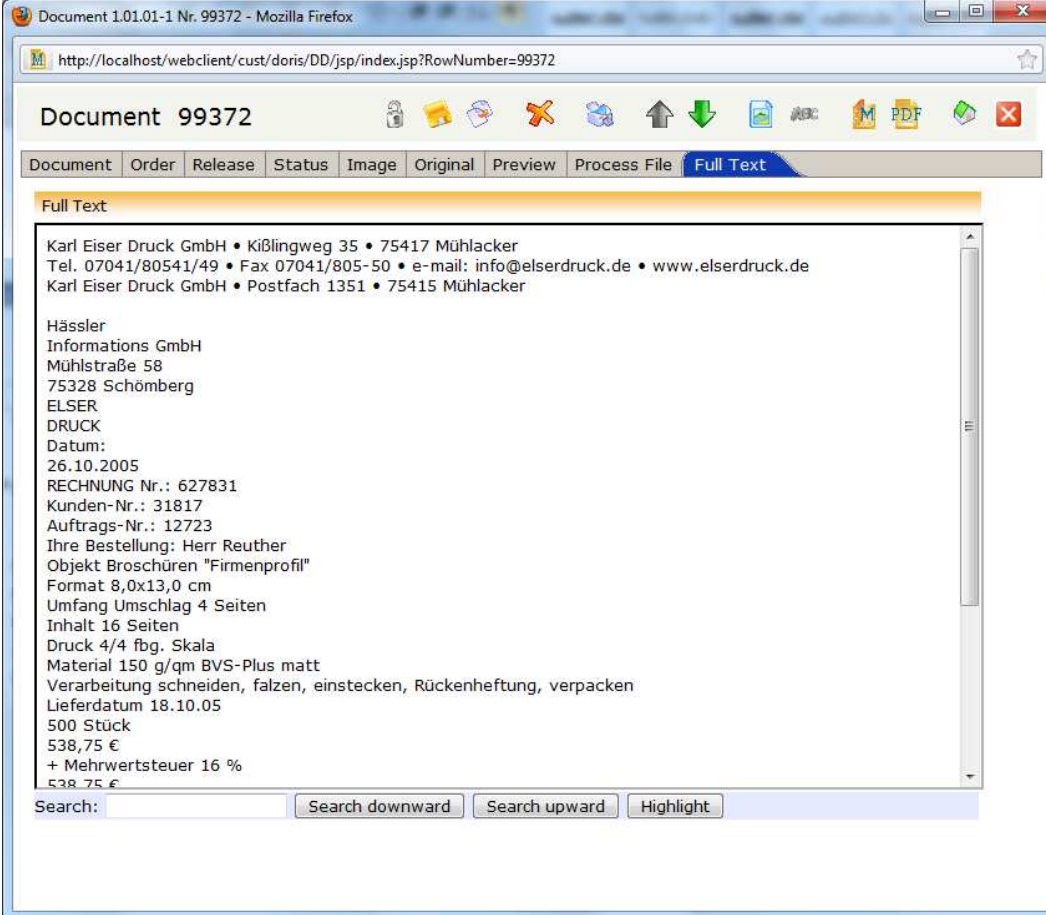
Date	Content Process File	State	Sender	Reference Number	Rownumber
21.04.2011	Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle	Eingabe	doris	1.01.01-1	99408

Below the second search results section, there is a button labeled "New Process File".

Tab Process File

Tab Full Text

The plain text of the attached document you can see in tab "Full Text". This feature is only available in the Version **DoRIS® Professional** and **DoRIS® Individual**.



Document 1.01.01-1 Nr. 99372 - Mozilla Firefox

http://localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=99372

Document 99372

Document Order Release Status Image Original Preview Process File **Full Text**

Full Text

Karl Eiser Druck GmbH • Kißlingweg 35 • 75417 Mühlacker
Tel. 07041/80541/49 • Fax 07041/805-50 • e-mail: info@elserdruck.de • www.elserdruck.de
Karl Eiser Druck GmbH • Postfach 1351 • 75415 Mühlacker

Hässler
Informations GmbH
Mühlstraße 58
75328 Schömburg
ELSER
DRUCK
Datum:
26.10.2005
RECHNUNG Nr.: 627831
Kunden-Nr.: 31817
Auftrags-Nr.: 12723
Ihre Bestellung: Herr Reuther
Objekt Broschüren "Firmenprofil"
Format 8,0x13,0 cm
Umfang Umschlag 4 Seiten
Inhalt 16 Seiten
Druck 4/4 fbg. Skala
Material 150 g/qm BVS-Plus matt
Verarbeitung schneiden, falzen, einstecken, Rückenheftung, verpacken
Lieferdatum 18.10.05
500 Stück
538,75 €
+ Mehrwertsteuer 16 %
538,75 €

Search: Search downward Search upward Highlight


Tab Full Text

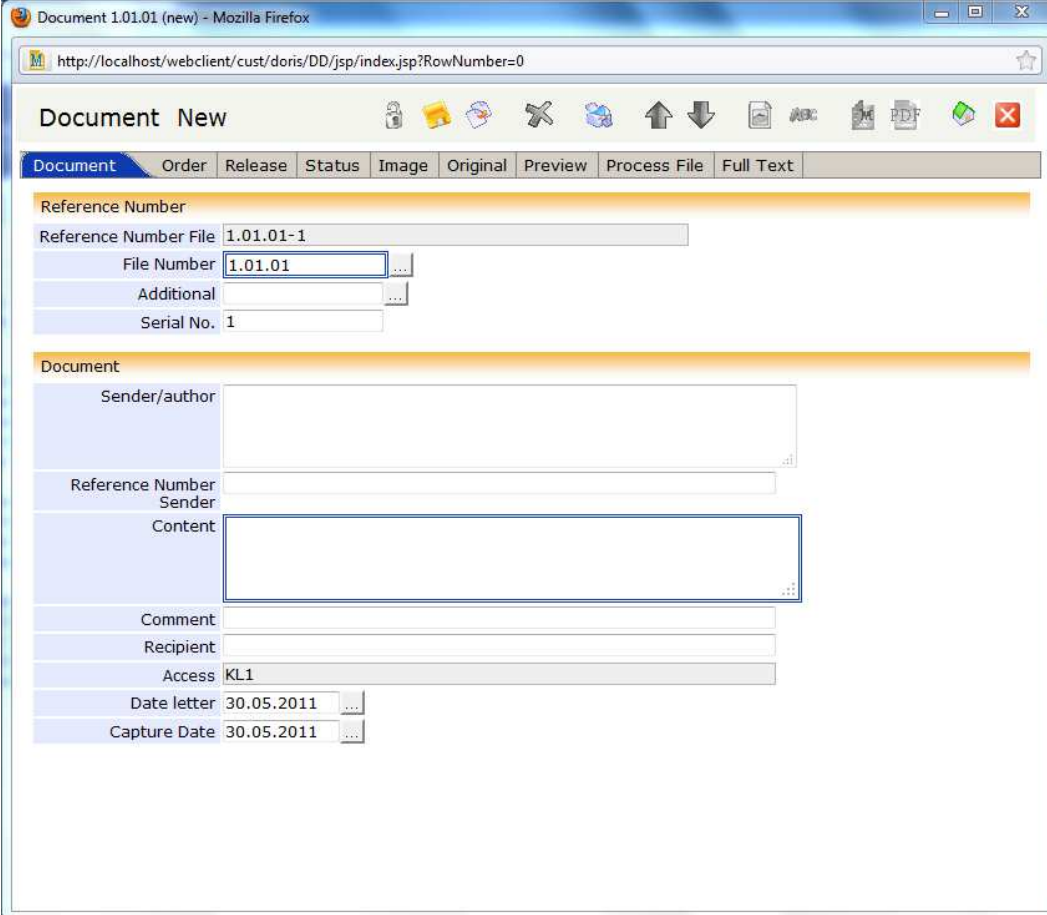
Registering a New Document

note

- Blue-framed fields are mandatory fields!
- For navigation between fields you can either use the keys Tab and Shift+Tab or directly select a field.

You need to register a new document?

1. Open the file you want to attach the new document to
2. Select tab "Document " and click **New Document** or the icon . The entry form for new documents is shown.
The default setting of some fields is according to the information of the corresponding file.
3. Enter further information in the various fields, if needed.



Document 1.01.01 (new) - Mozilla Firefox

http://localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=0

Document New

Document | Order | Release | Status | Image | Original | Preview | Process File | Full Text

Reference Number

Reference Number File 1.01.01-1

File Number 1.01.01

Additional

Serial No. 1

Document

Sender/author

Reference Number Sender

Content

Comment

Recipient

Access KL1

Date letter 30.05.2011


Capture Date 30.05.2011

Entry form "New Document"

Saving New Documents

To prevent loss of data either save 📄 your data input to a new document or save your changes of an existing document.

If you missed filling in a mandatory field, DoRIS will ask you to enter the missing data. Afterwards you have to save again.

 A mandatory field is empty. Please complete the missing information.

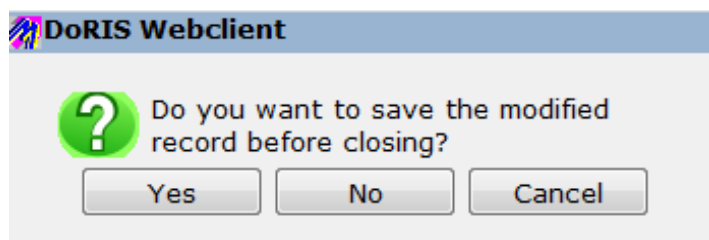
Editing and Completing Information of Documents

There might cases occur, when the data of existing documents have to be edited, e.g. process of borrowing. Depending on your rights please use the following features:

- Either: starting from the tree view of database, search with an appropriate query for the needed document. Afterwards pick it from the list of results on the right side of the main screen.
- Or: starting from the related file, open the needed document in tab “Documents”.

Further proceeding:




1. Unlock the document 🗝️.
2. Make the changes in the various tabs of the document
3. Save your changes 📄
4. Close the document 🗑️. If you have not saved the document yet, you will be asked if you want to save it now.

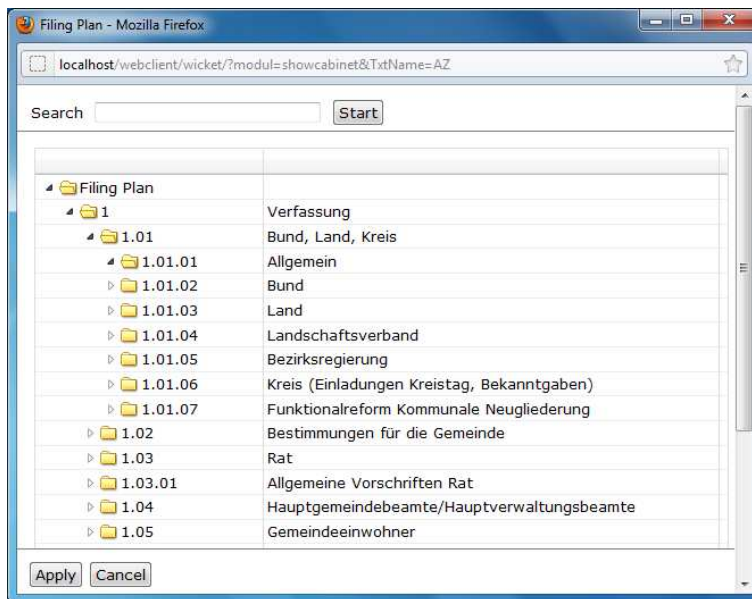


Request to save changes to the document

Reassigning of Documents

It may happen that you have to reassign a document to a different file, e.g. the assignment changed or was incorrect.

1. Select the document to be reassigned.
2. Unlock the document 
3. In tab "Document", either enter the number of the file the document should be assigned to in section Reference Number or browse within the filing plan : Navigate in the structure or search for a specific description within the filing plan. Apply the wanted file number by double click or with the button 





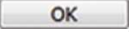
4. Save your changes  and close the document .

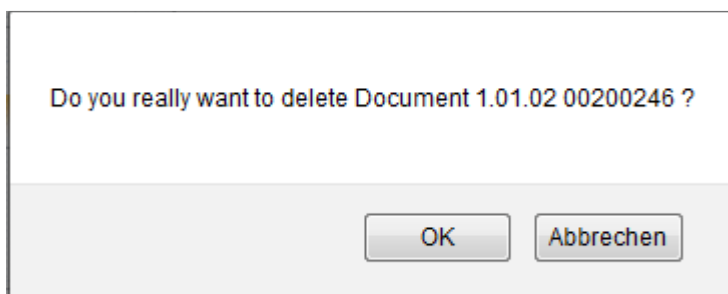
Now, the document is reassigned to the new file.

Deleting Documents

Would you like to remove documents into **Trash**? Documents which are located in **Trash** can be restored or permanently removed by authorized users only (in any case: system administrator). In the feature **DoRIS® User Management** the individual authorization levels are administrated and you may ask your system administrator for the according rights, if needed.

How to remove a document into **Trash**:




1. Open the document.
2. If necessary, unlock the document .
3. Remove the document into **Trash** .
4. Once you confirmed the removal , the document is removed into **Trash**.

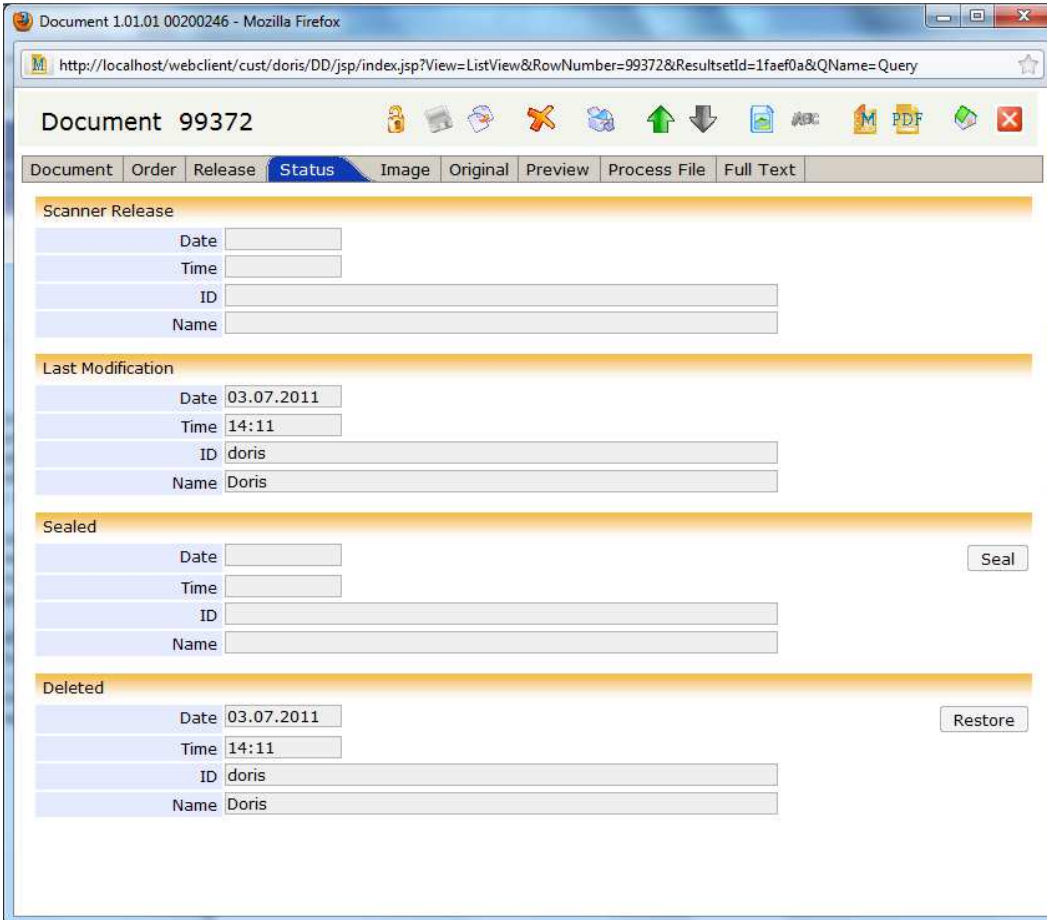


The document will be removed from file

Restoring Documents

Would you like to restore documents from Trash?

1. You need specific rights to restore documents from Trash.
2. Select the document in Trash.
3. Open the document with a single click.
4. Unlock document .
5. Change to tab "Status".
6. In section "Deletion", restore the document from Trash. The information about deletion is erased.
7. Save your changes .
8. Close the document .



Document 1.01.01 00200246 - Mozilla Firefox

http://localhost/webclient/cust/doris/DD/jsp/index.jsp?View=ListView&RowNumber=99372&ResultSetId=1faef0a&QName=Query

Document 99372

Document Order Release **Status** Image Original Preview Process File Full Text

Scanner Release

Date

Time

ID

Name

Last Modification

Date 03.07.2011

Time 14:11

ID doris

Name Doris

Sealed

Date

Time

ID

Name

Deleted

Date 03.07.2011

Time 14:11

ID doris

Name Doris

Tab Status

DORIS® PROCESS FILES


Structure of DoRIS® Process Files

In tab "Process File" of the file window select any process file and its detailed information is shown in a pop-up window with the process file number as header. The content of DoRIS® process files is organized in different tabs, comparable to DoRIS® files and documents.

On the next pages following tabs are described:

- Process File
- Records
- Protocol














note

Saved DoRIS® records are locked for (unintended) changes. If you want to edit any process file, you have to unlock  first.

In the following screenshots the process files are shown in unlocked state.

Icons and their Functions of Process File-Screen

Applying these icons you have direct access to often used functions.

Icon	Function
	attach DoRIS documents by dropping
	unlock process file
	before you can edit a process file, it needs to be unlocked save process file
	remove process file into trash
	create new document
	print process file
	show previous record
	show next record
	show main document
	save workflow as template
	PDF-Export of process file
	Show database screen
	close process file

Tab Process File

Tab "Process File" presents you all information regarding the content of a process file, like reference number of the corresponding file, content, capture date, presenter, and resubmission-data. You also get an overview of settings of the workflow, including the actual status of the process (which is also colour-coded). In this tab you can as well edit the workflow as start, forward or file a process.

Process File 99393

Process File Records Protocol

Reference Number

Reference No. of File 1.01.01-12-1

File Number 1.01.01

Additional 12

Serial No. 1

Process

Content Projektplanung und Durchführung

Resubmission Date

Resubmission for ID

Notes null

Capture Date 30.11.2006

Presenter System-Administrator ID sa

Access sa

Workflow	Step	Who	Action	Comment
	1	Kaiser	Notice	
	2	Schmid	Notice	
	3	Baumeister	Co-signature	

Comment




Notice

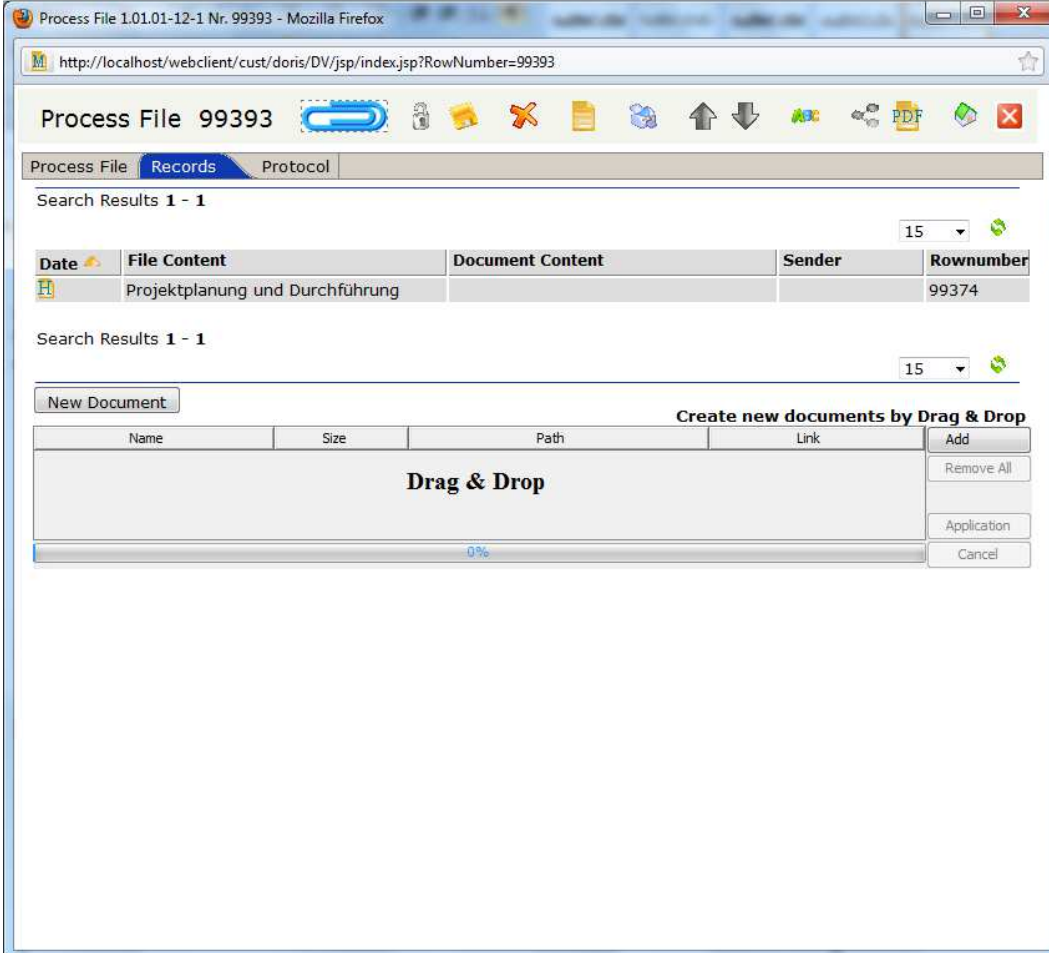
New line

Tab Process File

Tab Records

Tab "Records" shows the assigned records at a glance. With right click in the list of records you can choose in the menu if you want to open any record, define as main record or remove it.

Once you defined a record as main record it carries the letter "H" in the icon . If the main record contains any "original" or "image", you have direct access to them using the icon . In case there is only one document assigned to the process file, you can open the "image" or "original"  without prior defining the document as main record.




Process File 1.01.01-12-1 Nr. 99393 - Mozilla Firefox

http://localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99393

Process File 99393

Process File | **Records** | Protocol

Search Results 1 - 1

Date	File Content	Document Content	Sender	Rownumber
	Projektplanung und Durchführung			99374

Search Results 1 - 1

New Document

Create new documents by Drag & Drop

Name	Size	Path	Link
Drag & Drop			

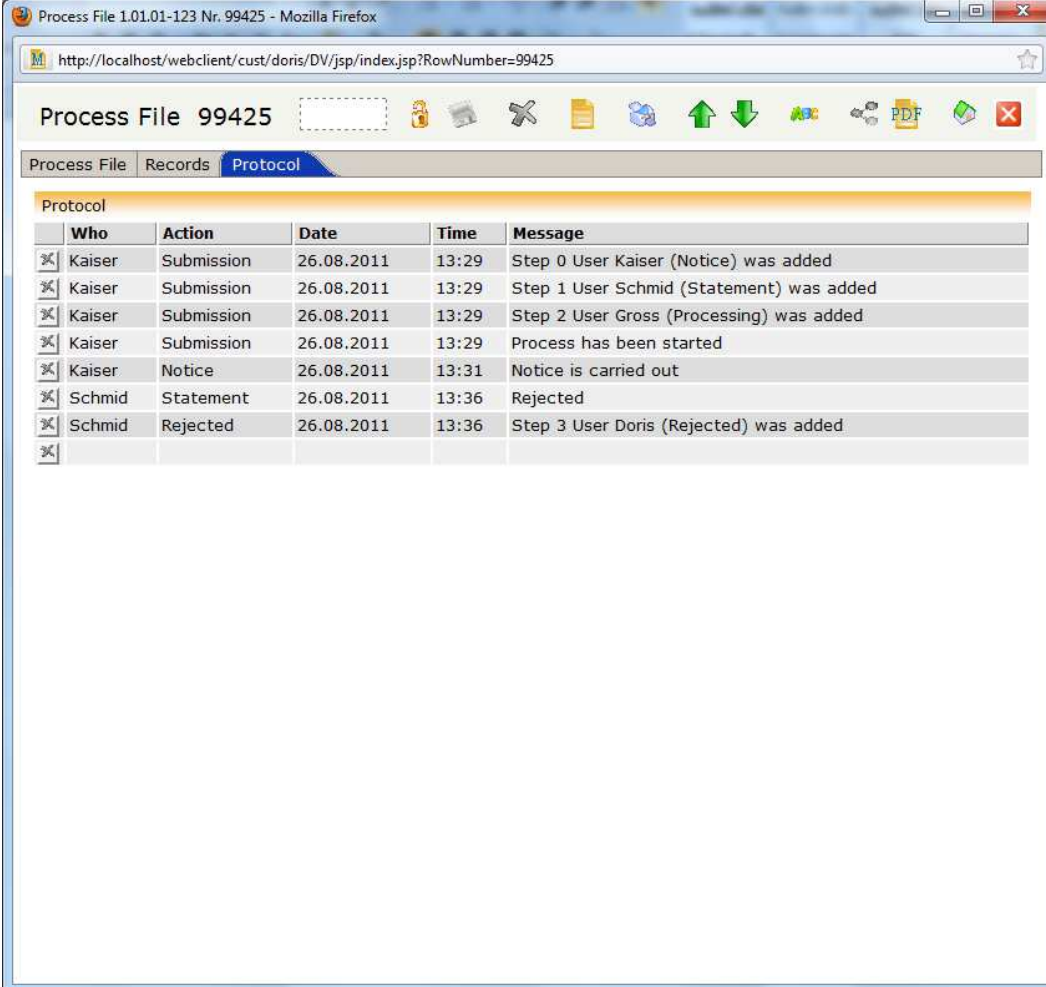
0%

Buttons: Add, Remove All, Application, Cancel

Tab Records

Tab Protocol

The workflow of the process file and its corresponding actions are recorded and the details are displayed in tab "Protocol".



The screenshot shows a Mozilla Firefox browser window displaying the DoRIS webclient interface. The address bar shows the URL: <http://localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99425>. The page title is "Process File 99425". The interface includes a navigation bar with tabs for "Process File", "Records", and "Protocol". The "Protocol" tab is active, displaying a table of actions.

	Who	Action	Date	Time	Message
✕	Kaiser	Submission	26.08.2011	13:29	Step 0 User Kaiser (Notice) was added
✕	Kaiser	Submission	26.08.2011	13:29	Step 1 User Schmid (Statement) was added
✕	Kaiser	Submission	26.08.2011	13:29	Step 2 User Gross (Processing) was added
✕	Kaiser	Submission	26.08.2011	13:29	Process has been started
✕	Kaiser	Notice	26.08.2011	13:31	Notice is carried out
✕	Schmid	Statement	26.08.2011	13:36	Rejected
✕	Schmid	Rejected	26.08.2011	13:36	Step 3 User Doris (Rejected) was added
✕					

Tab Protocol

Handling of Process Files

In a paper floating file, documents are combined to one process file. It may also occur that a floating file and thereby the process file contains only one document. On the cover of the floating file the sender notes the workflow: he writes the recipients who have to receive the process file one after the other. In general, all instructions for the recipients are marked handwritten on the first document; these statements may be called order. The recipients quote their actioned stamp handwritten with date and signature on the document, too.

Electronic process files work similar compared to a paper floating file: The workflow with its action is entered in a separate table. The recipients choose the answers from pull-down menus. If necessary they can also add a comment. All steps are automatically recorded with date, time and initiator.

Despite these common features, electronic process files in DoRIS® have some major advantages:

- The electronic version encloses both, documents and files.
- The information of the workflow and actioned stamps are saved in a separate procedure-document. For documentation purposes, this document may also be filed away in the corresponding file.
- Furthermore, in tab “Process File” each document has a link to all process files it is part of.

Technically, the document of the process file does not contain copies of the records or even the records themselves. It just provides links to the corresponding documents or files in order to prevent numerous versions of one record.

Sequence of Handling Process Files

DoRIS Process Files find versatile application:

- static business processes
- dynamic, open business processes
- „spontaneous“ business processes worked on at short notice by one recipient only
- distribution of scanned incoming mail to the person responsible – if necessary by management, too
- approval of drafts of written replies, or approval of internal documents
- ...

At least these steps are necessary to complete a process file:

- creating a new process file
- defining a workflow
- initiating a process file
- editing a process file
- completing a process file

Initiating a New Process File

Before a process file can be initiated it has to be created first.

1. Open the file or document you want to initiate a new process file for or create a process file without assignment to a file or document 📁.
2. Unlock file or document.
3. In tab "Process File" of a file or document open the entry form for a new process file **New Process File**.
4. The default setting of the field **Capture Date** is the date you created the process file (current date) and of the field **Presenter** is your user name.
5. The default setting of the field **Access** is according to a field of **DoRIS® Structured Storage**. The reference number and the content are also set by default if the process file is created from a file or document.
6. Fill in your information, considering that the blue-framed fields are mandatory.
7. Define a workflow (see next chapter).

Process File New

Process File Records Protocol

Reference Number

Reference No. of File 1.01.01-

File Number 1.01.01

Additional

Serial No.

Process

Content

Resubmission Date

Resubmission for ID

Notes

Capture Date 03.07.2011

Presenter Doris ID doris

Access doris

Step	Who	Action	Comment
1		Notice	

Comment

Submission

New line Start

Creating a new process file

note

- Blue-framed fields are mandatory fields!
- For navigation between fields you can either use the keys **Tab** and **Shift+Tab** or directly select a field.
- The field **File Number** is **not** a mandatory field; therefore a process file can be initiated without assignment to a file number. Especially for registrars, this could be an asset during processing of incoming mail. At the latest, a file number has to be assigned once the process file is put on file.


Defining a Workflow

With a workflow you define in which sequence which action has to be performed by whom. In tab "Process File" the workflow is depicted with different columns: Step, Who, Action, and Comment.

Please not

To define a workflow does not mean to start a workflow!

Follow these steps to define a workflow.







1. In column **Who** enter the name of the person who should be part of the workflow: either type in the user name or select it from the user directory .



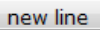
User Directory

Select the user from the directory list **Available Users**. If a user was previously selected, its user name is displayed in the field **Selected User**.


2. Now, the selected user is the first or next step in the workflow.
3. Assign an action from the pull-down menu to any user.

Workflow	Step	Who	Action	Comment
	 1	Baumeister 	Notice	
	 2	Lang 	Co-signature	
	 3	Kaminsky 	End of Circulati	
Comment	<input type="text"/>			


Submission

4. If more users should take part in this workflow, add new lines  and redo the assignment of actions. Additional lines will be added at the bottom of the list.

note

In case you have just defined a workflow that will be used more often, you can save it as a template . Enter a name for this workflow and the template is saved for your user ID.



In order to use a template, select from the list of workflow templates  and the different steps of the workflow are filled in automatically.

Actions of a Workflow

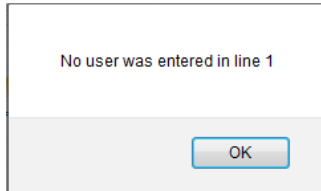
During the set up of the workflow you determine the actions for the recipients (called orders). Commonly used actions are already defined in the application. Custom-made refinements may be applied – if desired.

Action	Possible Answers	Comments
notice	OK, reject	This is more an informal action – just to notice the process file
processing	OK, reject	The listed person is in charge of processing
statement	OK, reject	The brief statement to the process file can be entered in the comment-field
co-signature	co-signature, reject	The process file has to be co-signed, possible brief notes can be entered in the comment-field
sign-off	OK, reject	With this action, the process file has to be signed-off at the end the processing; usually, it takes place before the action “put on file”. Possible brief notes can be entered in the comment-field.
put on file	OK	If the process file contains only one single document, the according file is added. Then verifies the minimum existence of one file as well as if all records are assigned to a reference number – if positive, the process file will be put on file.
file away	OK	Close process file
end of circulation	OK	Where required, the file with the reference number of the process file is attached. Afterwards the process file is completed.

After the last action of the workflow is performed and confirmed, the process file is automatically forwarded to the initiator, if it is not yet filed away. At the end of the workflow, the initiator puts the process file on file or restarts it.

Starting a Process File

In tab "Process File" start the process file. Once you started a process the table workflow and the button will be deactivated. If you have not defined a workflow yet you will be asked to do so, before you can start the process.



Information message

The process file is located in your folder `Initiated Processes` in the tree view of the database and you can track or just open it any time.

At the same time the process file is located in folder `Process Handling` (tree view of the database) of the user being next to take action in the defined workflow. In addition, this user receives an e-mail notification. As soon as this user completed the asked for action, the process file is forwarded along the defined workflow.

Editing a Process File

In the folder **Initiated Processes** of the tree view of the database you find all own processes and you may track them. Once a process file is started, it is located in the folder **Process Handling** (tree view of the database) of the user being next to take action in the defined workflow. In addition, this user receives an e-mail notification.

If you are next to take action in the workflow, the process file is located in your folder **Process Handling**. Once you edited the process and completed your action, use the lower left button to forward it along the defined workflow. The button is labeled according to active action, e.g. **Co-Signature** or just **OK**. You could also add comments or -if necessary- alter the workflow.

Whenever you need to interrupt the process for a certain reason, just send it back to the initiator **Reject**. In this case it may be very helpful for further processing to add a comment. Afterwards, the initiator may proceed without further enquiries: he can restart the process file once he extended the workflow.

After the last action of the workflow was performed the process file will be sent back to the initiator. The initiator files the process file away or assigns it to a file number and puts it on file.

Process File 99474

Process File Records Protocol

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content Project Industrial Area "Bump-Hill"
offer Company Master-Builder

Resubmission Date

Resubmission for ID

Notes

Capture Date 31.01.2012

Presenter Cramer ID cramer

Access cramer

Step	Who	Action	Comment
1	Cramer	Forward	
2	Schwarz	Notice	
3	Wagner	Processing	
4	Cramer	To put on file	

Comment

Processing
New line

Example of editing a process file: notice

Process File 99476

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content: Project Industrial Area "Bump-Hill" offer Company Master-Builder

Resubmission Date

Resubmission for ID

Notes

Capture Date: 13.02.2012

Presenter: Cramer ID: cramer

Access

Step	Who	Action	Comment
1	Cramer	Forward	
2	Schwarz	Notice	Sorry, yesterday we forgot to tell you that from now on Mr. Stein will be responsible for the offers of the project
3	Wagner	Processing	
4	Cramer	Rejected	

Comment

Rejected

New line

Example of editing a process file: rejecting with adding a comment

The workflow is coded by colours to see the status at a glance:

yellow next step in workflow, not yet performed

green action completed

red action was skipped (due to rejection of an action),
the process file is sent back to the initiator.

Please note!





You cannot revoke your actions!


Therefore, first finish the process file in conclusion and then click the buttons!

Additional Process-Steps




Attaching or Deleting Records to Process Files


You want to attach a document or file to a process file?

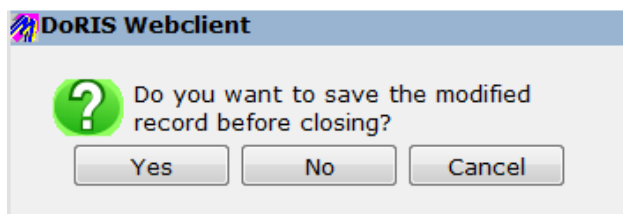
1. Search for the document or file you want to attach to:
you will easily find them with a standard query or an extended query. Alternatively, you can open the file, which contains the document, shown in tab "Documents".
2. Open the process file you want to attach the records to.
3. Unlock the process file .
4. Attach the according document or file with "Drag & Drop" to the process file by dropping it on the button  in the toolbar of the process file.
You find the document or file listed in tab "Records" of the process file.
5. Save your changes .
6. Close process file .

To add new documents to a process file you can also use the "Drag & Drop"-Function. After you added the relevant documents by "Drag & Drop", the buttons of the "Drag & Drop"-field are as long active until you assigned them to the process file by saving . Afterwards the documents are removed from the "Drag & Drop"-list and are shown in the upper list of the attached records.


This time you want to remove a document or file from a process file.


1. Unlock process file .
2. In tab "Record" position the pointer on the record you want to remove.
3. With right click select **remove**.
4. Save your changes .
5. Close process file .

If you wanted to close the process file  before you saved your changes, you will be asked if the modifications should be saved or discarded.



Saving Process Files

After you initiated a process file or edited an existing one, you have to save  the data. If you missed filling in a mandatory field, DoRIS will ask you to enter the missing data. Afterwards you have to save again.

 A mandatory field is empty. Please complete the missing information.

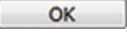
note

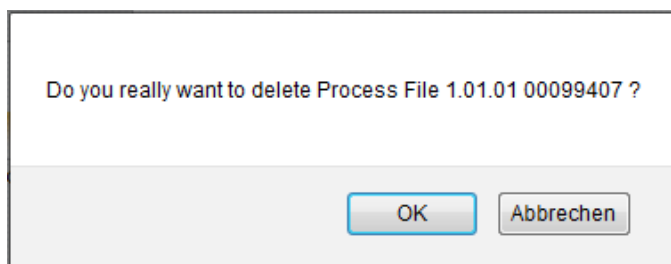
The process is **not** started yet – just defined and saved.

Deleting Process Files

You can remove process files into **Trash**. Process files which are located in trash can be restored or permanently removed by authorized users only (in any case: system administrator). In the feature **DoRIS® User Management** the individual authorization levels are administrated and you may ask your system administrator for the according rights, if needed.

How to remove process files into **Trash**:




1. Open the process file.
2. Unlock the process file .
3. Remove the process file into **Trash** .
4. Once you confirmed the message with , the process file is removed into **Trash**.

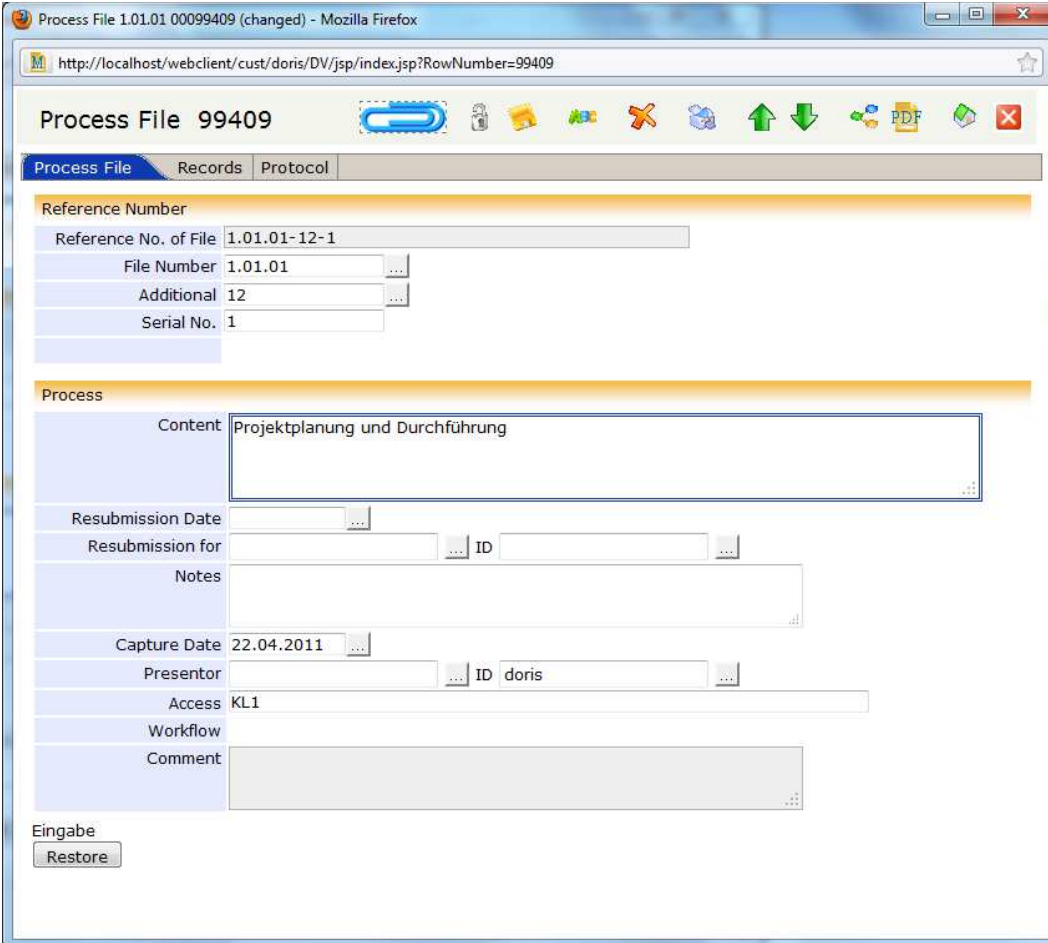


The process file will be removed from the file

Restoring Process Files

Would you like to restore process files from Trash?

1. You need specific rights to restore process files from Trash.
2. Select the process file in the trash folder
3. Open the process file with a single click
4. Unlock process file 
5. Restore the process file from Trash. The entry about deletion is erased.
6. Save your changes 
7. Close the process file 



Process File 1.01.01 00099409 (changed) - Mozilla Firefox

http://localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99409

Process File 99409

Process File Records Protocol

Reference Number

Reference No. of File 1.01.01-12-1

File Number 1.01.01

Additional 12

Serial No. 1

Process

Content Projektplanung und Durchführung

Resubmission Date

Resubmission for ID

Notes

Capture Date 22.04.2011

Presentor ID doris

Access KL1

Workflow

Comment

Eingabe

Restoring a process file

Special Functions within a Workflow

Simultaneous Delivery and Processing

The management asked you to always send the process files for notice to himself and his deputy at the same time. Or you know the schedule of your management and do not want to waste time: while the management is still in the meeting and did not have time to notice or approve the process file, the person in charge can already start working on the process file.

For this simultaneous procedure the process file has to be available for different persons at the same time. Therefore, the same step is entered in the DoRIS workflow for the different persons. The other fields are filled in accordingly.

After the workflow is defined and started, the persons with simultaneous delivery receive the process file at the same time in their folder `Process Handling`. Only after **both** responsible persons have processed and approved the process file it will be forwarded.

Process File 99477

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content

Resubmission Date

Resubmission for ID

Notes

Capture Date 13.02.2012

Presentor Cramer ID cramer

Access

Step	Who	Action	Comment
1	Cramer	Forward	
2	Schwarz	Notice	
	Weiss	Notice	
3	Wagner	Processing	

Comment

Notice

New line

Process file with simultaneous delivery

Rejecting Process Files

The recipient can reject an action for different reasons, e.g. a process file was misrouted and the department or the person in charge is not responsible for it:

- The management receives a process file regarding a different business process they are usually responsible for and rejects it. The initiator – in this case the employee of the mail office – is noticed about the rejection, changes the workflow and initiates the process file again .
- The head of department accidentally misroutes the process file:
Employees recognize that they are not in charge of this process file but their colleagues. They can either reject the process file and send it back to the initiator or (to accelerate to procedure) they can extend the workflow by the colleague's name and forward it directly. In the latter case the head of department receives the process file for notice and the colleague for processing. In both cases comments should be added.

Process File 99476

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content Project Industrial Area "Bump-Hill"
offer Company Master-Builder

Resubmission Date

Resubmission for ID

Notes

Capture Date 13.02.2012

Presentor Cramer ID cramer

Access

Step	Who	Action	Comment
1	Cramer	Forward	
2	Schwarz	Notice	Sorry, yesterday we forgot to tell you that from now on Mr. Stein will be responsible for the offers of the project
3	Wagner	Processing	
4	Cramer	Rejected	

Comment

Rejected

Example of process handling: rejecting with adding a comment

Extending and Restarting the Workflow

If a process file was rejected, it is sent back to the initiator. The initiator has the option to extend the workflow **new line** at the end of the table. Thereby the initiator can change the workflow and restart it.

The screenshot shows the 'Process File 99487' interface in Mozilla Firefox. The browser address bar shows 'localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99487'. The interface includes a navigation bar with 'Process File', 'Records', and 'Protocol' tabs. Below this, there are sections for 'Reference Number' (with fields for Reference No. of File, Az, Zusatz, and Lfd.Nr.), 'Process' (with fields for Content, Resubmission Date, Resubmission for, Notes, Capture Date, Presentor, and Access), and a 'Workflow' table. The workflow table has columns for Step, Who, Action, and Comment. The current workflow steps are: 1. Dinkel (Processing), 2. Gross (Notice), 3. Schuster (Rejected & Returned), and 4. Fischer (Processing). Below the table is a 'Comment' field with the text 'Dear Mr. Fischer, I heard you are in charge of processing the renovation of public buildings.' At the bottom, there are three buttons: 'New line', 'Restart', and 'File away'.

Workflow	Step	Who	Action	Comment
	1	Dinkel	Processing	
	2	Gross	Notice	
	3	Schuster	Rejected & Returned	
	4	Fischer	Processing	

Process file after rejection and prolongation in order to restart

Monitoring Results

You might install a resubmission in order to monitor the process results. There are different types of resubmission available:

Resubmission all,	My Resubmission all,
Resubmission until today,	My Resubmission until today,
Resubmission until tomorrow,	My Resubmission until tomorrow,
Resubmission today,	My Resubmission today,
Resubmission tomorrow	My Resubmission tomorrow

If you install a resubmission for monitoring purposes, the process file is shown in the folder `Resubmission all`. The recipient of the resubmission receives an entry in the folder `My Resubmission all`. Depending on the due date the process file may be shown in `Resubmission until today` or `Resubmission until tomorrow` and `My Resubmission until today` or `My Resubmission until tomorrow` respectively.

Thus, you receive a list of all processes with due date of today in your folder `My Resubmission until today`. With this information, you are able to complete the process files on time. In addition, the process files are also in the folder `Process Handling` of the according person.

If you want to get information about the state of progress, open the process file and you find the entry in tab "Process File" as a status-note. Further information is noted as comments on tab "Records". In tab "Protocol" all actions regarding this process are recorded.

If you want to add an additional date or the process is not completed yet, you have to add a new resubmission date. The monitoring procedure starts all over again.

The screenshot shows a web browser window titled "Process File 1.01.01-123 Nr. 99425 - Mozilla Firefox". The address bar shows the URL `http://localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99425`. The page title is "Process File 99425". Below the title, there are navigation tabs: "Process File", "Records", and "Protocol". The "Protocol" tab is active, displaying a table with the following data:

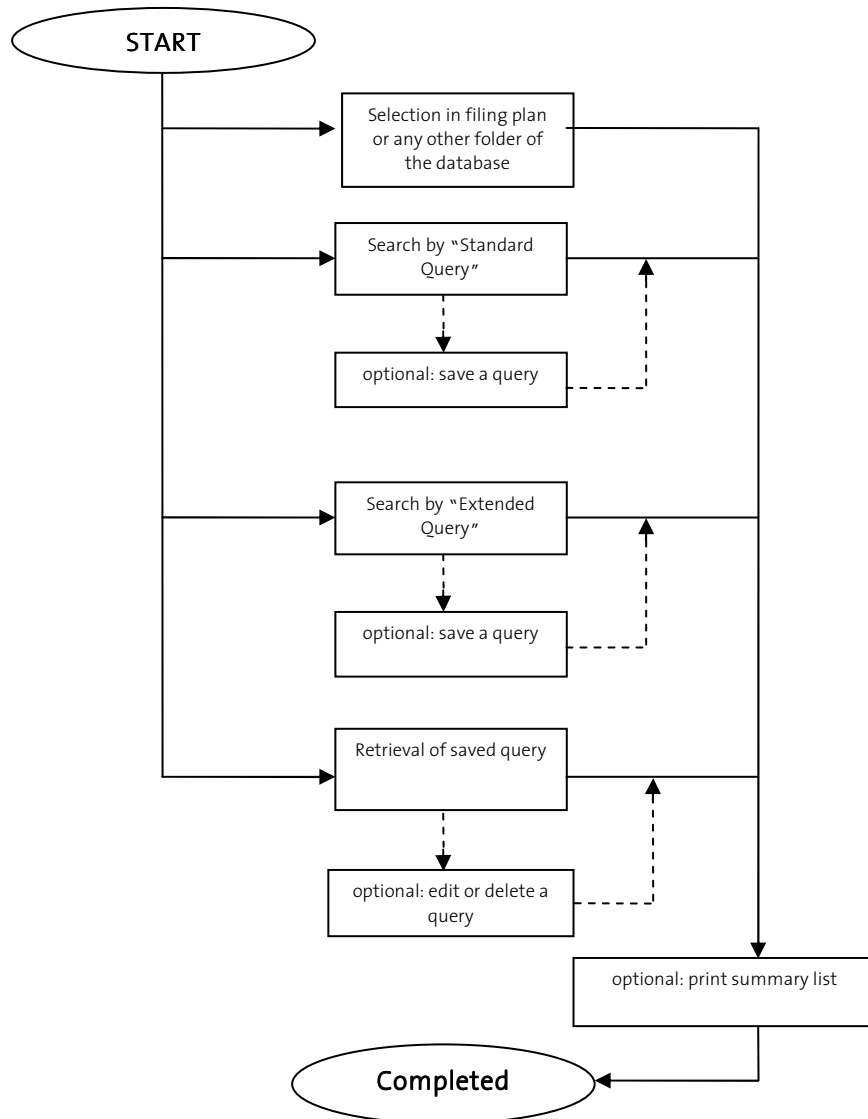
	Who	Action	Date	Time	Message
✕	Kaiser	Submission	26.08.2011	13:29	Step 0 User Kaiser (Notice) was added
✕	Kaiser	Submission	26.08.2011	13:29	Step 1 User Schmid (Statement) was added
✕	Kaiser	Submission	26.08.2011	13:29	Step 2 User Gross (Processing) was added
✕	Kaiser	Submission	26.08.2011	13:29	Process has been started
✕	Kaiser	Notice	26.08.2011	13:31	Notice is carried out
✕	Schmid	Statement	26.08.2011	13:36	Rejected
✕	Schmid	Rejected	26.08.2011	13:36	Step 3 User Doris (Rejected) was added
✕					

Tab Protocol with all actions regarding this process file after completion of processing

QUERIES IN DORIS®













DoRIS queries are a fast and comfortable feature to find a selection of objects. If you want to visualize the sequence of a query, please follow this flow diagram.

Search for documents or files:



Icons and their Functions of Queries

Applying these icons you have direct access to often used functions.

Icon	Function
	start query
	save query
	logical AND
	logical OR
	logical NOT
	last character of the basic term of a query
	show vocabulary
	PDF Sync download of files for offline-view
	scroll to first page of list
	show Previous page
	show Next page
	scroll to last page of list

Standard Query

With this feature you will find very easily all records, which meet the requirements of the query. Queries are stored and retrieved when required. You will find them in the folder **Saved Queries** in the tree view of the database.

See how **DoRIS® Webclient** finds the records you search for:

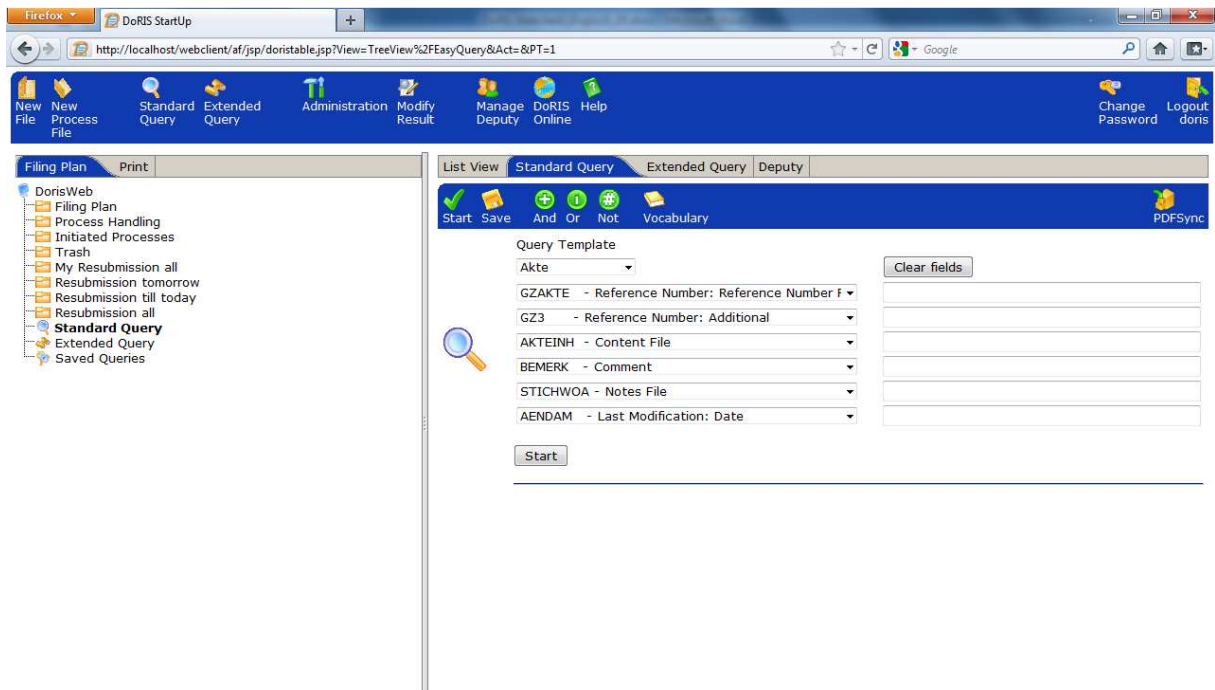
1. In the tree view of the database either right click and choose **new standard query** or **standard query** in the menu, select the folder **Standard Query**, or in the right side of the main screen choose tab "Standard Query".
2. The entry form of standard queries is displayed. On the left side you find drop-down menus of the categories and on the right side fields to enter search requirements (of the left chosen category).
3. Enter your search requirements for the query:
Select in the pull-down menu the needed category and enter on the right side the appropriate term – you could also select it from the vocabulary 📖.

Within one category you can combine various criteria according to Boolean algebra – use **+** (logical AND), **|** (logical OR) and **#** (logical NOT).





Different categories (selected on the left side) are combined with a logical "AND".

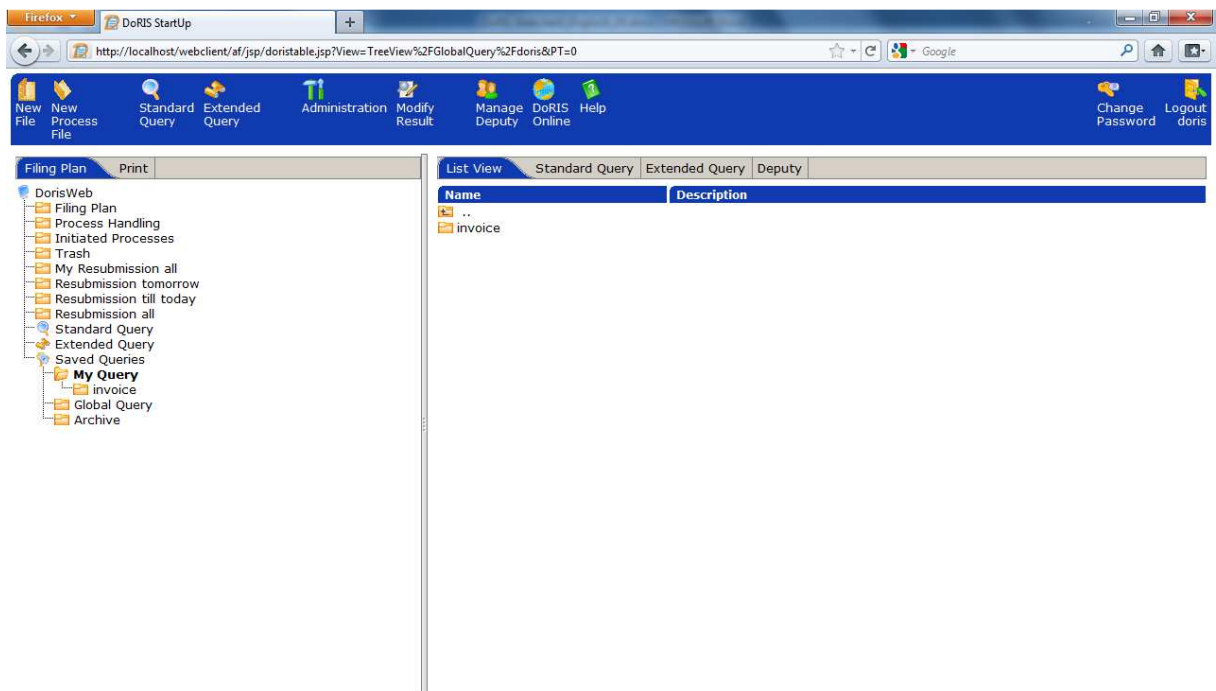
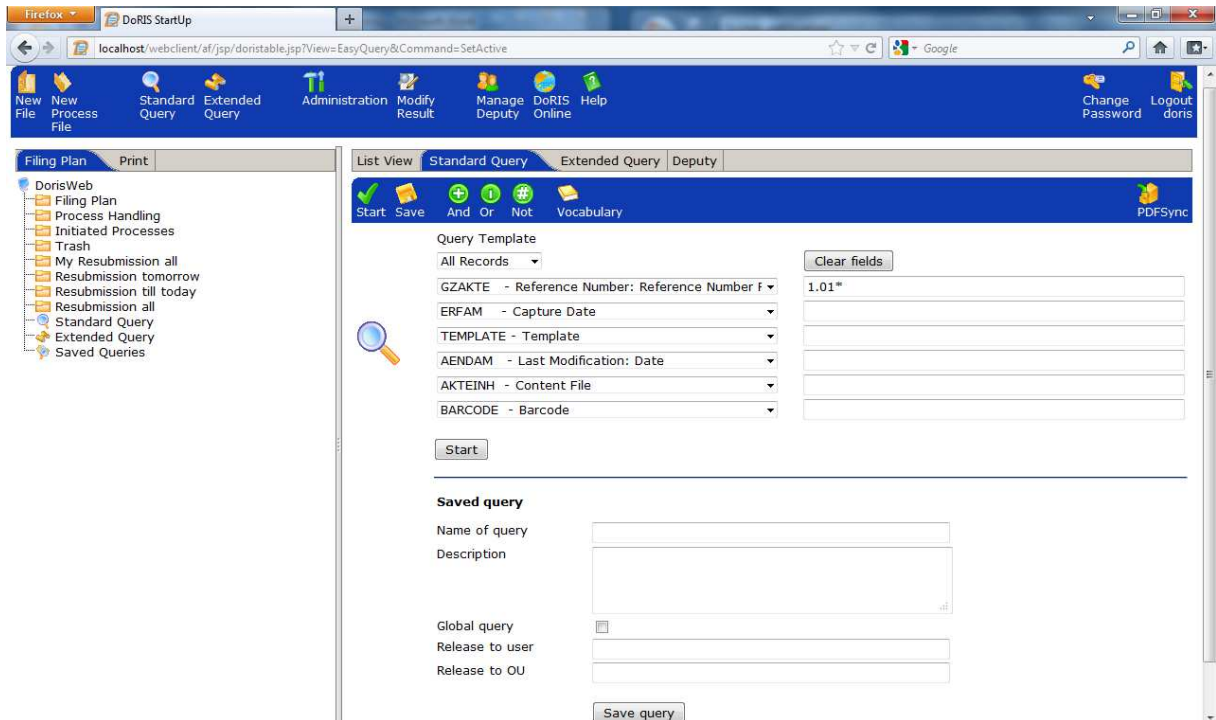
note

You want to combine different categories with the logical "OR" (e.g. content of document or keyword is invitation)?
Please apply an Extended Query.



DoRIS® Document management and business process management. DoRIS Webclient 7.0.32 Revision 1.300
Entry mask of Standard query

4. If you want to save this query, click  first, then fill in the data in the appropriate fields: Name of Query, Description, if applies Release to user or Release to OU (organizational unit).
Once you saved -  or - the query, it is shown in Saved Queries > My Queries and can be used until it is deleted.
5. Start the query , , or .



Name and description of saved standard query

DoRIS® Query-Features

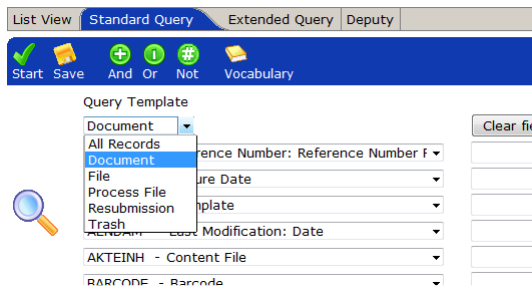
DoRIS® provides two features, which can significantly ease the handling of queries: Queries-Templates and Vocabulary.

Query-Templates

In the top drop-down menu Query Templates you select from the following configured templates:

- File
- All Records
- Trash
- Document
- Process File
- Resubmission

After you choose any template, various fields will be filled automatically.




note

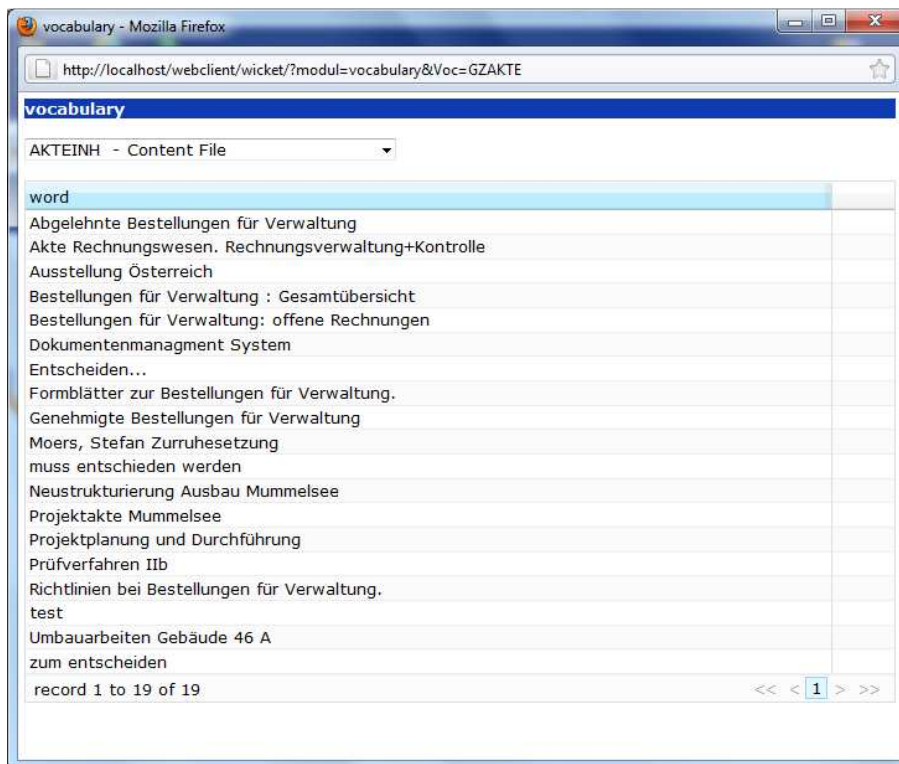
The query templates can be altered by your administrator for different users or groups of users. It may happen that you find different or additional templates in your list.

Vocabulary

In the vocabulary a variety of words is listed for each category. Using this feature, you select the search criteria from predefined terms and thereby prevent dissimilar spelling or phrasing for the very same issue.

How to use the function of the vocabulary:

1. After you chose a category in the entry form of the query, position the cursor in the according field for the search criteria.
2. Open the vocabulary .
3. In the top drop-down menu you see the chosen category and the list displays its related vocabulary. If necessary, you can select another category.
4. Select the appropriate entry from the list and click on it.
5. The entry is applied and the window of the vocabulary automatically closed.



Vocabulary

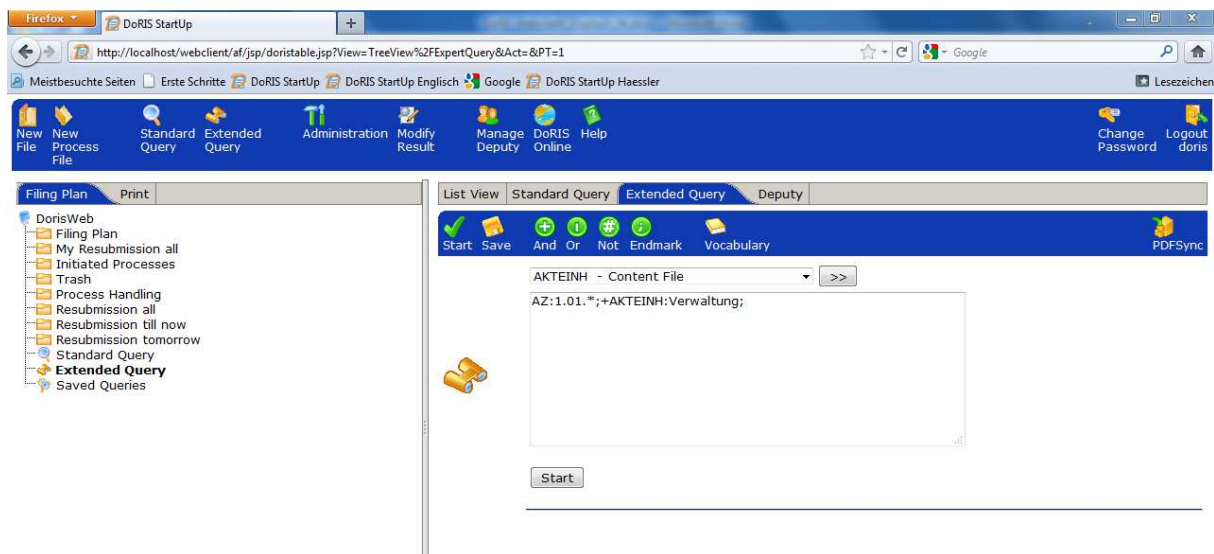
The language of the terms in the vocabulary depends on the language used in DoRIS, here: German. That means the language with which the user types in the fields, like in `content` or `files` etc.

Extended Query

For a much narrower search result, you can phrase more complex requirements. Both, within and between the partial requirements the logical operators “AND”, “OR”, and “AND NOT” are applicable. For a better structure, brackets have to be introduced.

Would you like to create an Extended Query?

1. Either right click in the tree view of the database and choose **new extended query** or **extended query** in the menu or choose the tab “Extended Query” in the right side of the main screen.
2. The entry form of the extended query is displayed.



Entry form for extended queries

3. Enter your search requirements in the text field (middle of the window):
With the pull-down menu you select the category and add its term in the text field. To add search criteria of the selected category, you could either type them directly into the text field or use the vocabulary (see Vocabulary, p. 83).
4. According to Boolean algebra, apply logical operators to link multiple terms within one basic form or to link basics forms to one another:
 (logical AND), (logical OR) and (logical NOT).
Brackets are inserted by your keyboard.
5. If you want to save this query, click first, then fill in the data in the appropriate fields:
Name of Query, Description, if applies Release to user or Release to OU (organizational unit).
Once you saved - or - the query it is shown in Saved Queries > My Queries and can be used until it is deleted.
6. Start the query , , or .

List View Standard Query **Extended Query** Deputy

Start Save And Or Not Endmark Vocabulary PDFSync

AKTEINH - Content File >>

AZ:1.01* ;+AKTEINH:Verwaltung;

Start

Saved query

Name of query

Description

Owner

Global query

Release to user

Release to OU

Save query

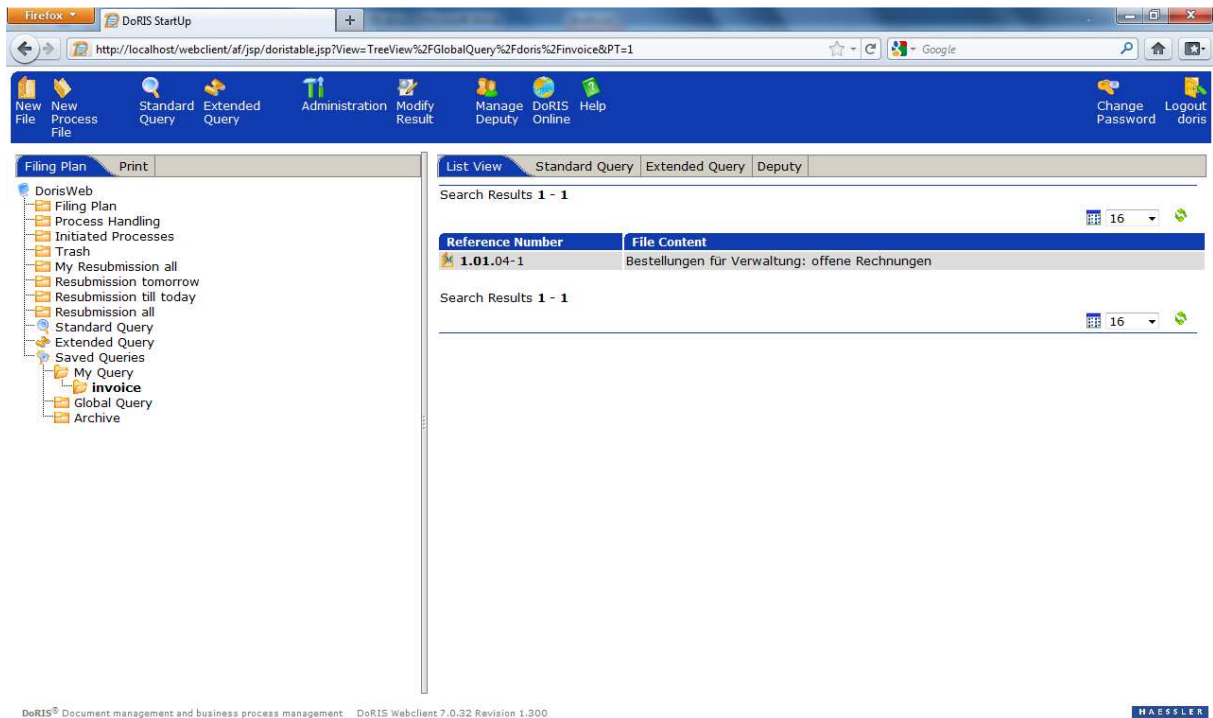
Entry form to save an extended query

Saved Queries

In **Saved Queries** you will find queries for reapplication. Divided into various subfolders, there are your own saved queries, as well as queries of other users, which are released to you.

Displaying and Updating Results of Saved Queries

Navigate in the folder **Saved Queries** of the tree view of the database to the needed subfolder. Deploy any saved query – its updated result will be displayed in the list view.



Result of a saved query

Editing Saved Queries









Do you need to edit saved queries?

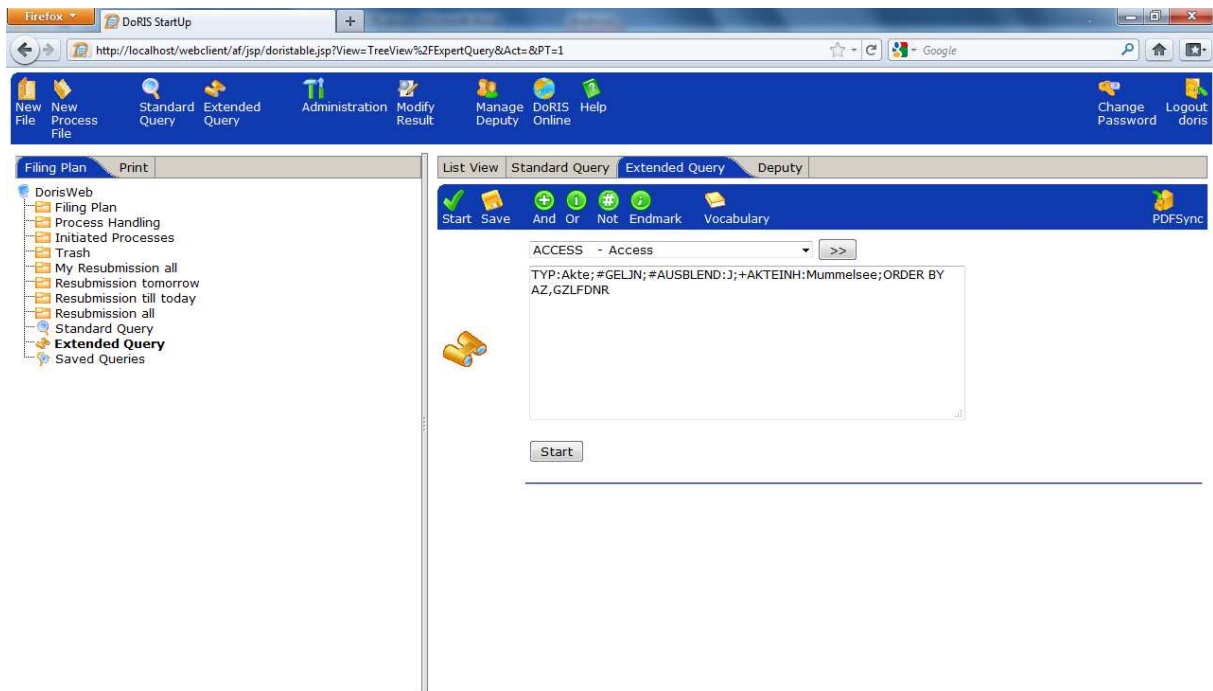
No problem: Whenever you want to edit a query, its search requirements are displayed as an extended query - regardless of its kind: standard or extended.

Please Note!

You can only edit your own queries!

This is how you edit your own saved query:

1. Navigate in **Saved Queries** to subfolder **My Queries**.
2. Mark the query you want to edit. Now it is shown in bold letters. With right click you open a menu and select **edit query**. The query is displayed in tab "Extended Query" on the right side of the main screen, the mode to edit queries.
3. Edit the search requirements. With the pull-down menu you select the category and add  its term in the text field. To add search criteria of the selected category, you could either type them directly in the text field or use the vocabulary  to copy terms in the search criteria (see Vocabulary, p. 83).
4. According to Boolean algebra, apply logical operators to link multiple terms within one basic form or to link basics forms to one another:
 (logical AND),  (logical OR) and  (logical NOT).
 Brackets are inserted by your keyboard.
5. You may also change the fields **Name of Query**, **Description**, if applies **Release to user** or **Release to OU** (organizational unit).
6. Save your changes .
7. You could directly start the query ,  or **Start**.



Archiving Saved Queries

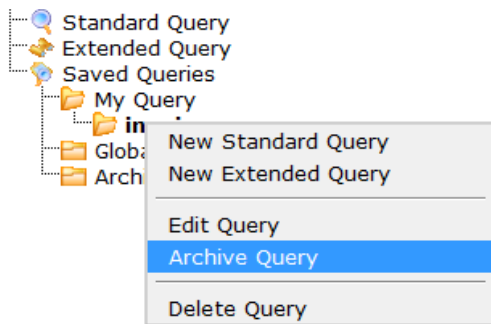
Do you have to manage a huge variety of saved queries? Though you use only a few of them frequently? Just archive rarely used queries! Nevertheless, you can still use them directly from the archive.

Please Note!

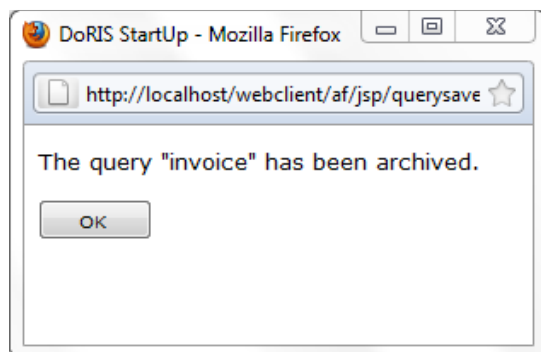
You can just archive your own queries!

Follow these steps to archive your own saved queries:

1. Go to **Saved Queries** and subfolder **My Queries**.
2. Mark the query you want to archive. Now it is shown in bold letters.
3. With right click you open a menu and select **archive query**.
4. A pop-up window provides the information, that the query is archived now. Therefore, you find it in the folder **Archive**.



Kontext-Menu for editing saved queries



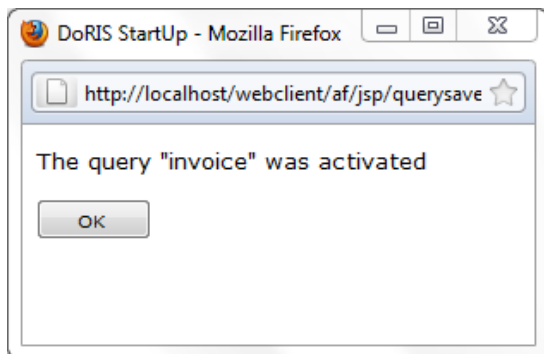
Info-message of archiving queries

Activating Archived Queries

You can deploy archived queries directly from archive.

Though you need to use an archived query more frequently again? Just activate an archived query again and thereby re-locate it in the subfolder *My Queries*.

1. Go to *Archived Queries*.
2. Click on the query you want to activate. Now it is shown in bold letters.
3. With right click you open a menu - choose **activate query**.
4. A pop-up window provides the information, that the query is activated again. Now it is located in the subfolder *My Queries*.



Info-message of activating queries

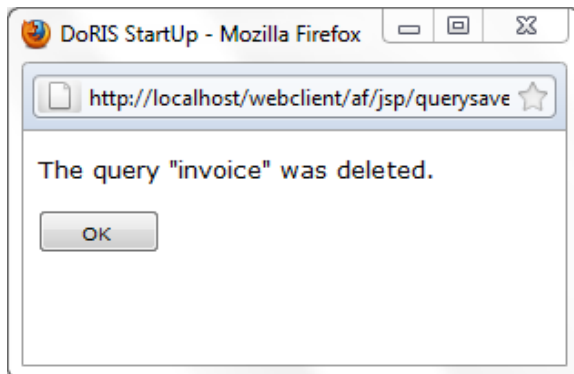
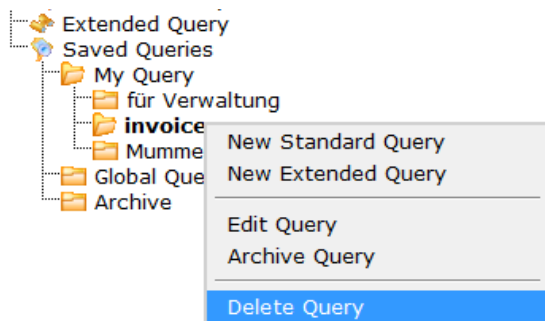
Deleting Saved Queries

You can delete your own saved queries. If you want to delete archived queries you have to activate them before.

Please Note!

You can only delete your own queries!

1. Navigate to folder **Saved Queries**, subfolder **My Queries**.
2. Mark the query you want to delete. Now it is shown in bold letters.
3. With right click you open a menu and select **delete query**.
4. A pop-up window provides the information, that the query is deleted.



Info-message of deleting queries

Syntax of Queries

In this chapter you find information about the DoRIS® query-syntax, which is required to perform extended queries.

Please find information of the following topics on the next pages:

- basic term (structure of queries)
- logical operators
- comparison operators
- brackets
- search trough tables
- truncation signs
- sorting

Basic Term of Queries

With a query you determine the requirements which have to be fulfilled in order to be part of the set of results. The total requirements can be composed by a set of partial requirements which are connected by logical operators.

Each requirement is described by the basic structure:

```
<category> : [<comparison operator>] <term> [<logical operator> <term> [..]];
```

with:

<category>	Name of category
<term>	term to be searched for terms can be abbreviated with wildcards (see Wildcards, p.96)
<comparison operator>	comparison operators are: < > <= >= <> <=> (see Comparison Operators, p.94)
<logical operator>	logical operators are: + , # ? & @ (see Logical Operators, p.93)

You have to place a colon after the name of the category. Between single elements of the query you could insert a blank character. The basic structure is always closed with a semi-colon. For the elements in square brackets, they are optional and the content could be as often repeated as you like.

Please Note!

The general hierarchical rules for the analysis of arithmetic expressions do not apply in DoRIS®. You have to manually determine the sequence of the analysis of arithmetic expressions with brackets.

Example

location : Frankfurt;

In the category "location" you search for the term "Frankfurt". As a result you receive all documents which contain the term "Frankfurt".

location : Frankfurt + Mainz;

In the category "location" you search for the terms "Frankfurt" and "Mainz". As a result you obtain all documents which contain the terms "Frankfurt" and "Mainz" contemporaneously.

date : 01/09/1986 <=> 30/06/1996;

The result of this query contains all documents with dates (in the field Date) from 1. September 1986 to 30. June 1996.

Logical Operators

In a query, logical operators link terms within the basic structure and multiple basic structures to one another. For the latter case, you can only apply the following operator:

+ , #.

Some logical operators may provide different results, depending on the database-management-system deployed. For MS-SQL and ORACLE these listed logical operators are available:

Logical operator, that link terms within the basic term and multiple basic terms to one another

- + Logical AND
- , Logical OR
- # Logical AND NOT

Other logical operators

- ? Approximation sign
finds terms which are located close by the phrase of the query. There is a total range of 100 characters -50 to the left and 50 to the right- ; with an ORACLE database management system even 100 characters to each side.
e.g. *HAESSLER?COMPUTER*
- & Finds similar terms compared to the phrase of the query. Suitable to find families of words, conjunctives or plurals
e.g. *&to have* would give the result: to have/have/has
- @ Finds terms with a thematic reference to the phrase of the query.
e.g. ORACLE database management system:
@(automovive) vehicles = car, truck, motorbike

Example

location : Frankfurt + Mainz;

As a result, you receive all documents, which contain in the category "location" the terms "Frankfurt" and "Mainz" simultaneously.

location : Frankfurt; + name : Miller;

As a result, you obtain all documents, which contain in the category "location" the term "Frankfurt" and in the category "name" the term "Miller" simultaneously.

location : Frankfurt, Munich;

As a result, you receive all documents, which contain in the category "location" either the term "Frankfurt" or "Munich" or both simultaneously.

location : Hamburg # Berlin;

As a result, you obtain all documents, which contain in the category "location" the term "Hamburg" and, at the same time, do not include "Berlin".

Comparison Operators

The following comparison operators are available to determine ranges for your queries.

Comparison Operator	Explanation
<	Less than
>	Greater than
<=	Less than or equal to
>=	Greater than or equal to
<>	greater than and less than (as a range, excluding limit)
<=>	Greater than or equal to and less than or equal to (as a range, including limit)

You can link numerical and alphanumerical values or dates with comparison operators.

note The format for dates is: *dd.mm.yyyy*.

Example

Income : < 1200;

The result of the query comprises all records with the value in category „income“ less than 1200.

Income : <= 1200;

The result of the query comprises all records with the value in category „income“ less than or equal to 1200.

Date : 19.01.1997 <> 26.02.1997,

The result of the query comprises all records with dates in the category “date” later than 19. January 1997 and earlier than 26. February 1997.

Name : Miller <=> Schulz;

The result of this query comprises all records with dates in the category “name”, that are in alphabetical order after or same as “Miller” *and* before or same as “Schulz”

note The data type of the categories rules about the sorting of its content.
For instance: if a category is defined with alphanumerical sorting the entry “90” is greater than the entry “2000” since in an alphanumerical sequence the sign “9” is sorted after “2”.

Brackets

By means of brackets – (“ and ”) – you could change the sequence of the analyzes of the phrases and terms of a query.

Brackets are solved from the inside to the outside, which means phrases of the lowest level are analyzed first.

Example:

content : chancellor + (Schroeder , Merkel);

The result of the query comprises all records with “chancellor” and “Schroeder” or “chancellor” and “Merkel” in the category “content”.

Please Note!

The general hierarchical rules for the analysis of arithmetic expressions do not apply in DoRIS®.

You have to manually determine the sequence of the analysis of arithmetic expressions with brackets.

Searching trough Tables

Within a DoRIS® record, you can search trough tables provided that the categories are accordingly parameterized. In this special query you search in various categories for terms with the same index; which means they have the same position in the table.

Queries related to tables are set in curly brackets – “{” and “}”. In these queries, terms are not linked with one another; only categories are linked with the logical operators + (logical AND) and # (logical AND NOT).

Example:

{language : English; + grade: excellent;}

With this query you select those records, in which the terms “English” and “excellent” in categories “language” and “grade” have the same index.

<i>language</i>	<i>grade</i>	<i>name</i>
French	good	Smith
English	excellent	Miller
German	excellent	Adams
English	satisfactory	Baker
...

note

You can apply “Search trough tables” in extended queries only.

Wildcards

With wildcards “*” you can shorten any character string. Thereby, the wildcard is placeholder for any number of characters.

You want to search for a term; however you are not quite sure about the whole phrase. In this case please use a wildcard either in front (e.g. *omputer), in the middle (e.g. co*er) or at the end (e.g. com*).

note

- In case wildcards are used, the query might last unusually long – may be even minutes.
- Since the truncation depends on the field and the database, it is not generally applicable

Example

*Comput**

searches for terms starting with “comput”, the result may –for example- comprise words that have to do with computer.

*Si*ing*

searches for terms starting with “si” and ending with “ing”, for example “sightseeing” or “sitting”.

Sorting

By means of the sorting operator “order by” you can sort the selected documents of the query results.

Attach this phrase of the sorting operator at the end of the query, after the last semi-colon:

```
order by <category_1> [asc | desc] [, <category_n> [asc | desc] [..]]
```

with

<category_1>	first category to be sorted
<category_n>	next categories to be sorted
asc	Sort ascending
desc	Sort descending

note

- There is a maximum of eight categories to be sorted. If the direction of the order is missing (asc or desc), it will automatically be sorted in ascending order.
- Sorting operators can only be applied in extended queries.

Example:
income : <2400; order by Name desc
 This query selects all records with a value in category „income“ less than 2400.
 In addition, these records are sorted in descending order by the category “name”.

Excursion to Boolean Algebra

The logical basis of the queries is the Boolean algebra, which describes the linkage of truth-values. The truth-values could either be TRUE or FALSE and may be linked by logical operators AND, OR or NOT (as its negation).

Here you find some basic rules:

Links with logical AND-links are:

$$\begin{array}{l} \text{TRUE AND TRUE} \rightarrow \text{TRUE} \\ \text{TRUE AND FALSE} \rightarrow \text{FALSE} \\ \text{FALSE AND FALSE} \rightarrow \text{FALSE} \end{array}$$

The result of a logical AND-link can only be TRUE if each part is TRUE

Links with logical OR-links are:

$$\begin{array}{l} \text{TRUE OR TRUE} \rightarrow \text{TRUE} \\ \text{TRUE OR FALSE} \rightarrow \text{TRUE} \\ \text{FALSE OR FALSE} \rightarrow \text{FALSE} \end{array}$$

The result of a logical OR-link is TRUE if just one part is TRUE

Links with of negation are:

$$\begin{array}{l} \text{NOT TRUE} \rightarrow \text{FALSE} \\ \text{NOT FALSE} \rightarrow \text{TRUE} \\ \text{NOT (A AND B)} \rightarrow \text{NOT A OR NOT B} \end{array}$$

For a correct defined query you have to strictly apply these rules.

Example

Search for all documents which were sent in by Müller and Krause.

Translated into Boolean algebra, this case is described as:

Search for all records that have the entry “Müller” or the entry “Krause” in field “URHEBNAM”. This results in the formula: URHEBNAM = Müller OR URHEBNAM = Krause.

And the according query reads as follows: URHEBNAM: Müller, Krause;

You could also search with the standard query:

The screenshot shows the 'Standard Query' interface in DoRIS. At the top, there are tabs for 'List View', 'Standard Query', 'Extended Query', and 'Deputy'. Below the tabs is a blue navigation bar with icons for 'Start', 'Save', 'And', 'Or', 'Not', 'Vocabulary', and 'PDFSync'. The main area is titled 'Query Template' and features a dropdown menu for 'Schriftstück'. Below this are several input fields corresponding to different search criteria: 'URHEBNAM - Creator of Letter', 'DOKINH - Content Document', 'BARCODE - Barcode', 'VOLLTEXT - Full Text', 'SCANAM - Scanner Release: Date', and 'STANDORT - Location File'. The first input field, 'URHEBNAM - Creator of Letter', contains the text 'Müller, Krause'. A 'Clear fields' button is located to the right of the input fields. A magnifying glass icon is positioned to the left of the input fields. At the bottom left of the form area, there is a 'Start' button.

Example case

Query-Overview

Wildcards




For a missing part of a query-term apply a wildcard ”*“ :

front	example
	*mputer
middle	Co*er
end	Comput*

note

- In case wildcards are used, the query might last unusually long.
- Since the truncation depends on the field and the database, it is not generally applicable

Logical Operators

linkage	Operator	icon	example	The result comprises:
logical AND	+		Computer + PC	all computers that are PCs
logical OR	,		Computer , PC	all computers und all PCs
logical AND NOT	#		Computer # PC	all computers that are no PC

Comparison Operators

Comparison Operator	Explanation
<	less than
>	greater than
<=	less than or equal to
>=	greater than or equal to
<>	greater than and less than
<=>	greater than or equal to and less than or equal to

Query by dates

Query by the means of a ...	Query-entry	Example of entry
... certain day	exact date	01.01.2012
... period which is after a certain date	later / greater than stated date	> 01.01.2012
... period which is after or exactly on a certain date	later / greater than or equal to stated date	>= 01.01.2012
... period which is before a certain date	earlier / less than stated date	< 01.01.2012
... period which is before or exactly on a certain date	earlier / less than or equal to stated date	<= 01.01.2012
... limited period without consideration of stated dates	period from ... to, without limits/ greater than or less than stated dates	01.01.2012 <> 31.01.2012
... limited period with consideration of stated dates	period from ... to, including limits/ greater than or equal to and less than or equal to stated date	01.01.2012 <=> 31.01.2012

The format for dates is: *dd.mm.yyyy*

Example Case

Please Note!

In a record, you can only search for terms, which are used; e.g. VSTATUS is not used in documents – the query gives a “no result”.

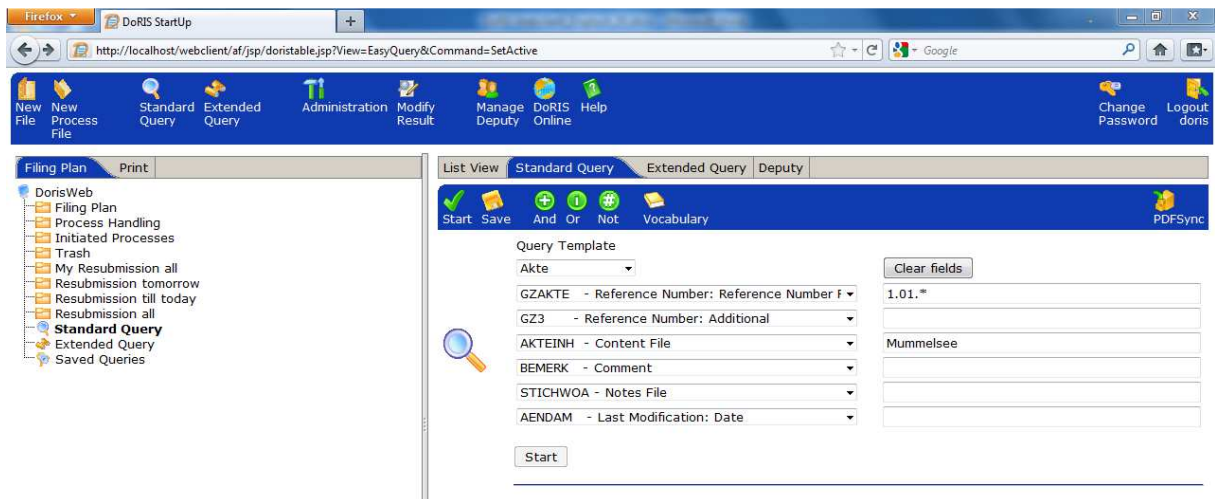
note

Please note that results of queries depend on your access rights. Results of other users may differ according to their access rights.

Example Cases: Using Standard Queries

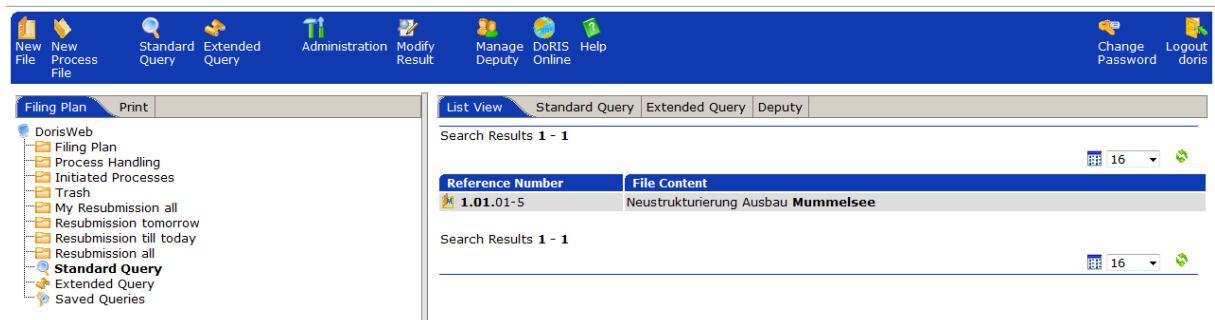
Example 1

Search for all files with the reference number “1.01.*” and the file-content „Mummelsee“.



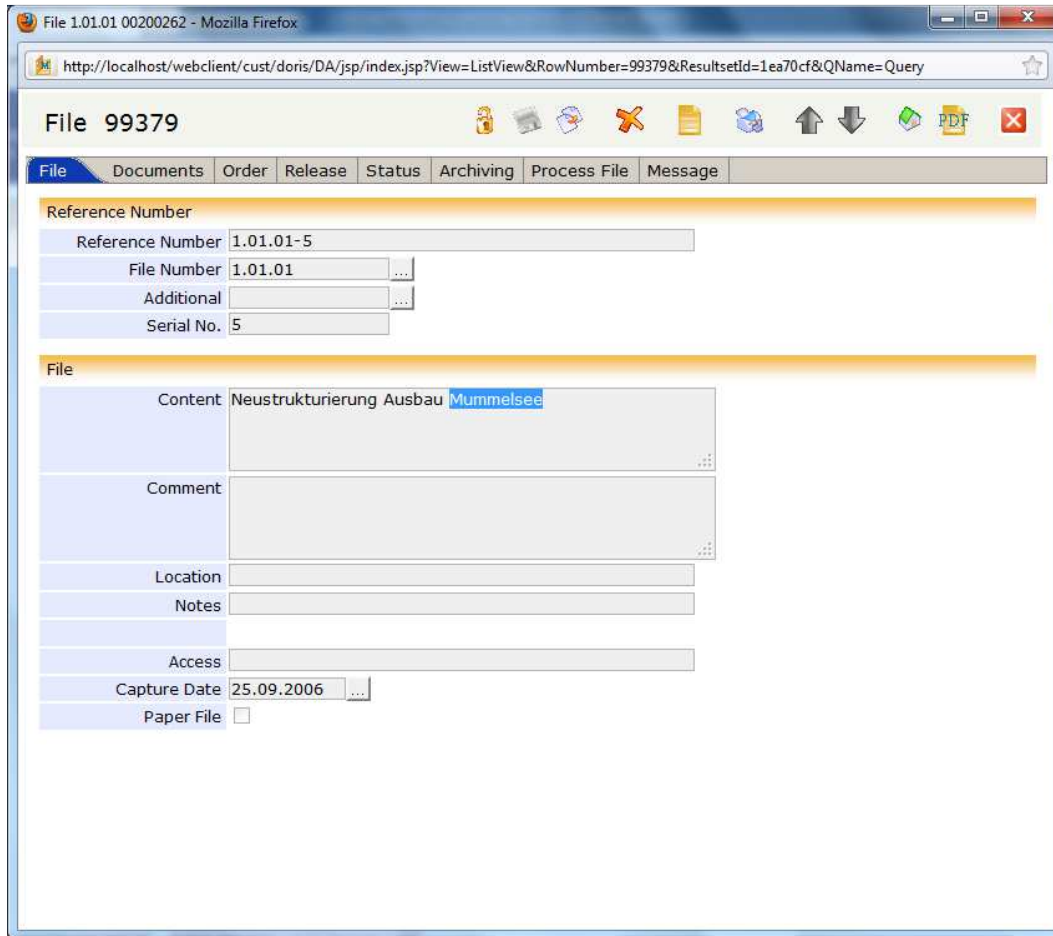
Example case for a standard query

In the folder Standard Query, you will find the results of the query.



Result of Standard Query

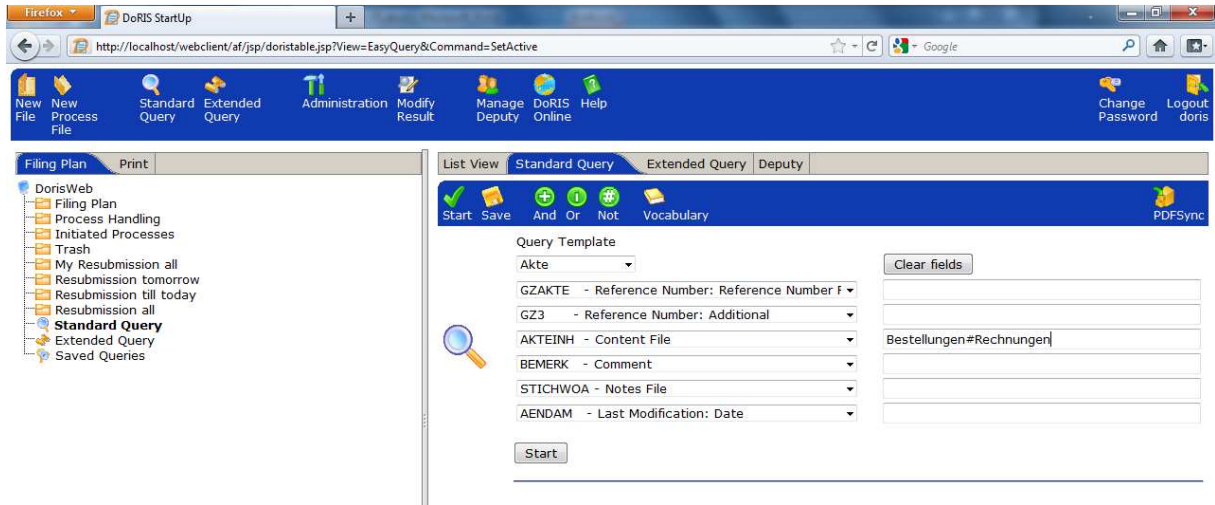
In the list of results, open any entry for editing or viewing.



View of file, opened in the list of results of the query

Example 2

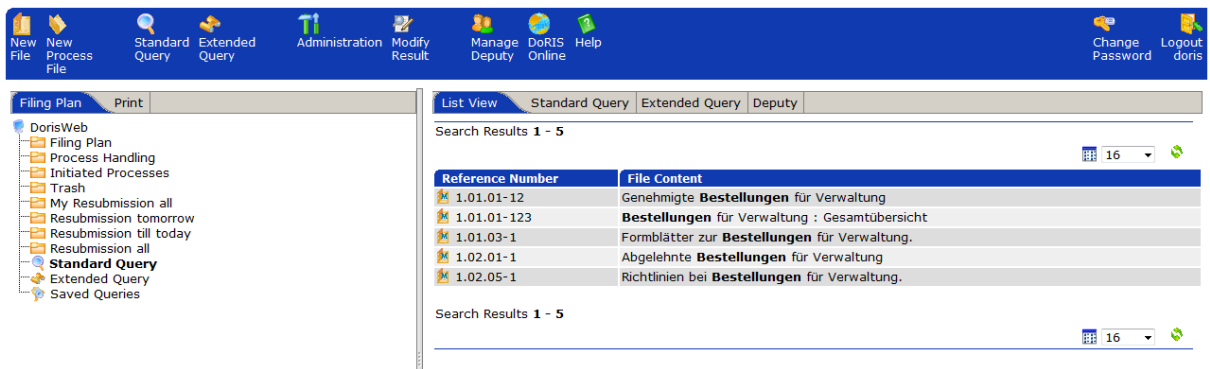
Search for all files with the file-content “Bestellungen” though NOT “Rechnungen”.



Example of NOT-linkage

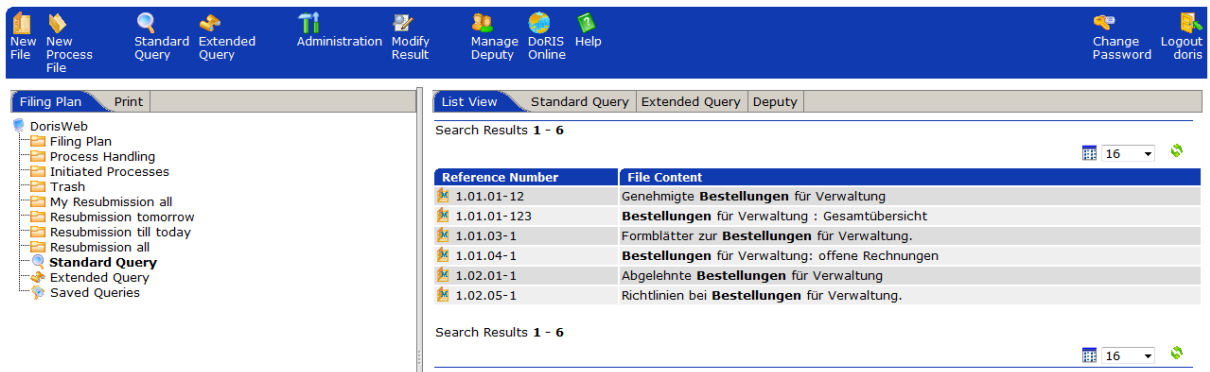
Please Note!

You must not use NOT (#) at the beginning of a field.



Result of NOT-linkage

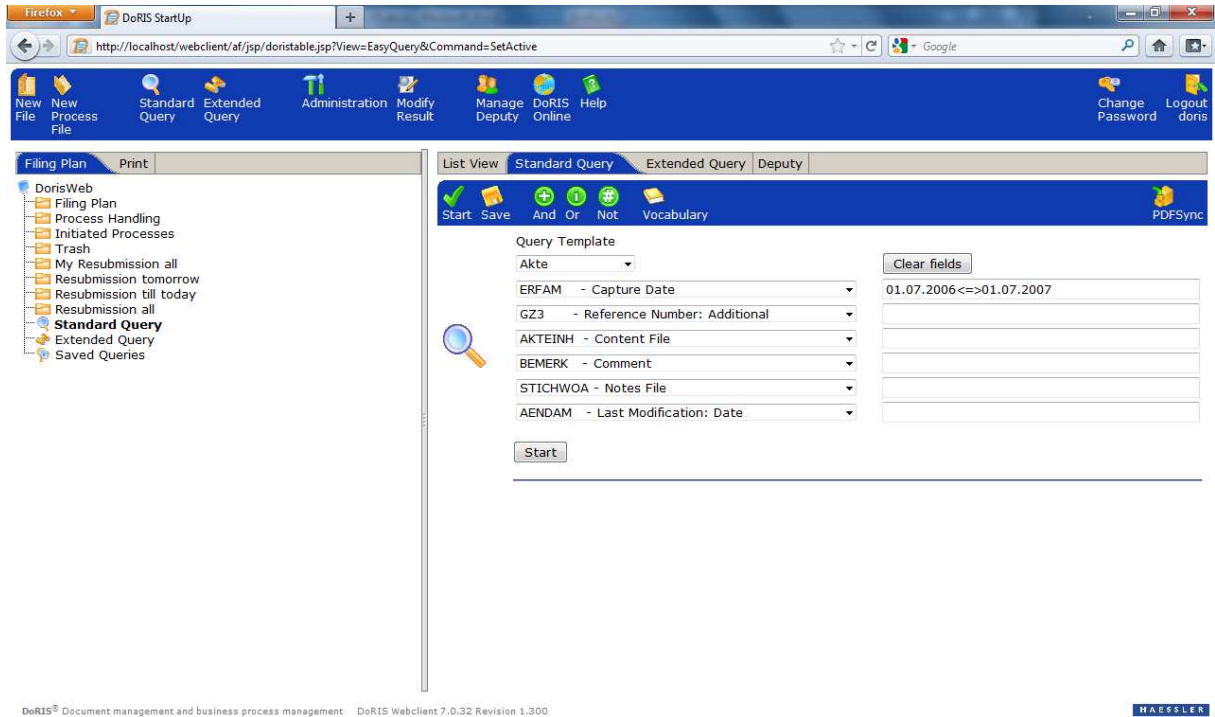
The standard query “Bestellungen” is performed without NOT-linkage (NOT “Rechnungen”) for comparison reason. In addition, one file with the term “Rechnungen” is found (ref. no. 1.01.04-1).



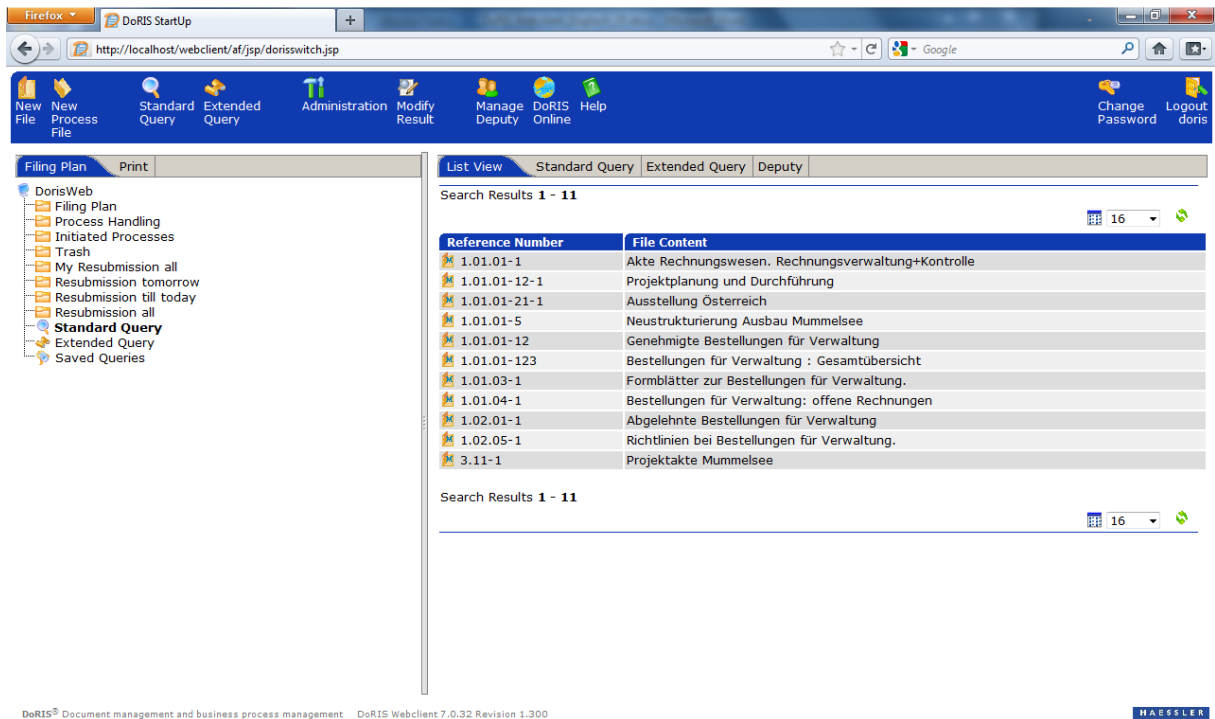
Result of standard query

Example 3

Search for all documents that were received between 01.07.2006 and 01.07.2007.



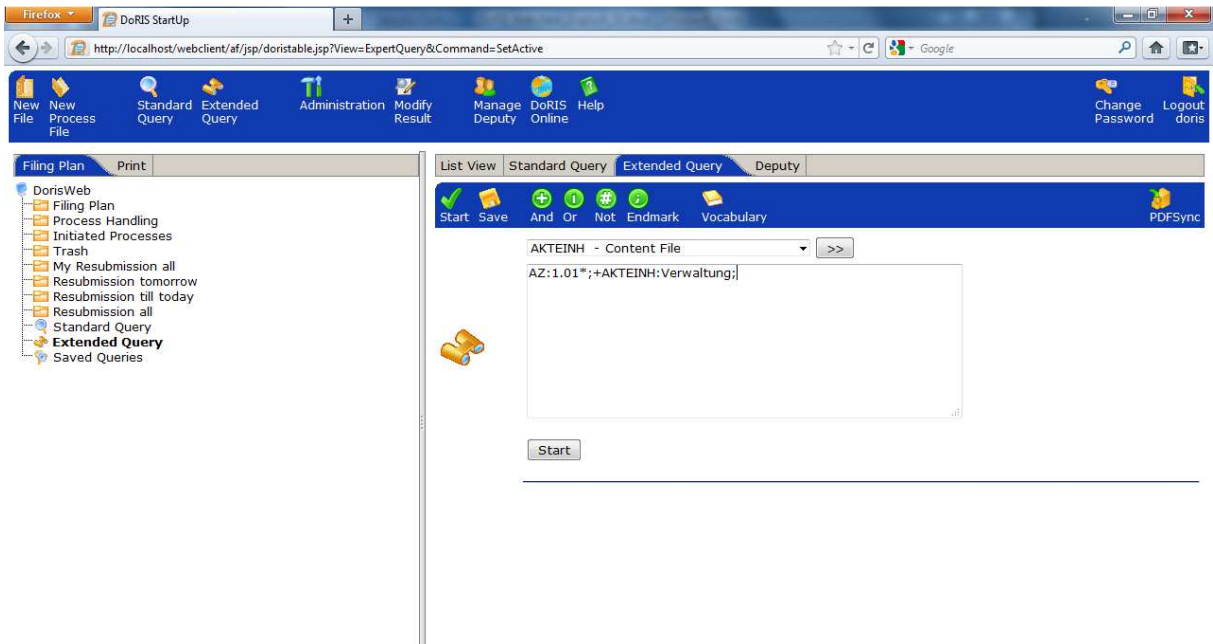
Example of a query by date



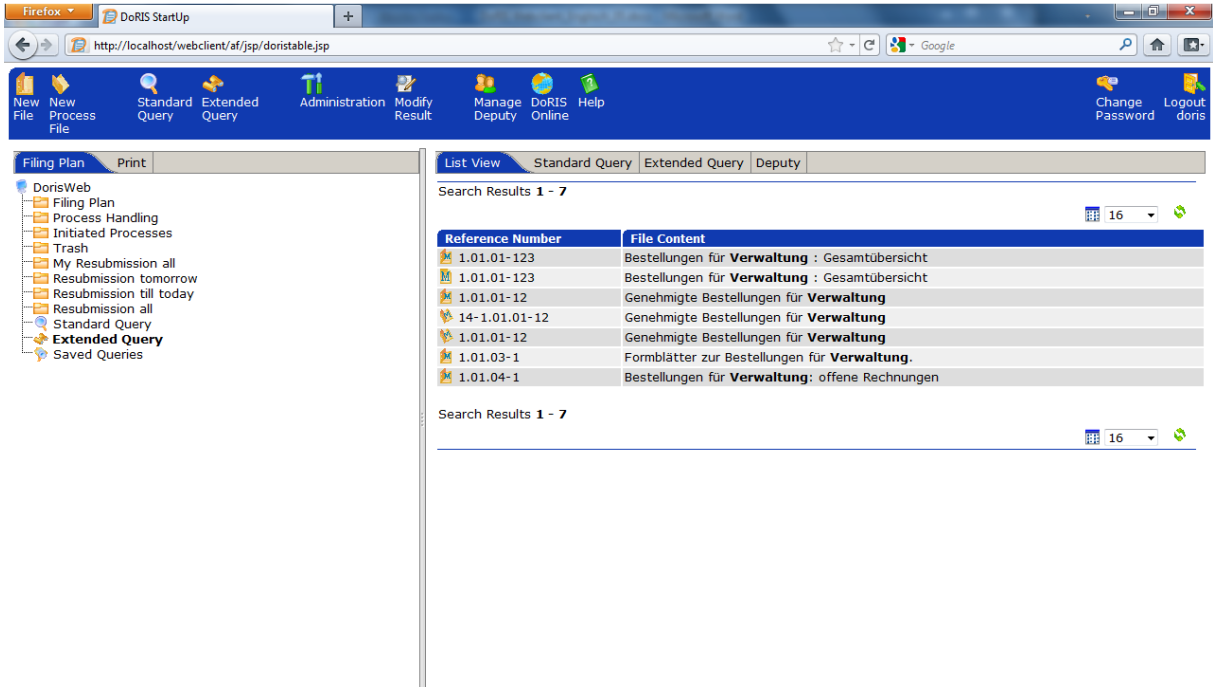
Result of a query by date

Example Case of Extended Queries

Search for files with the file number "1.01.*" and the file-content "Verwaltung".



Example of an Extended Query



Result of an Extended Query

DORIS® PDFSYNC – FILE-VIEW OFFLINE



In general, when you work in your office you are connected to the server and therefore have access to all files.

Imagine you are on the road – on a business trip, riding a train, at a customer’s office or having a meeting in another government agency. In this case it happens that you are not connected to the server and have no access to your files.

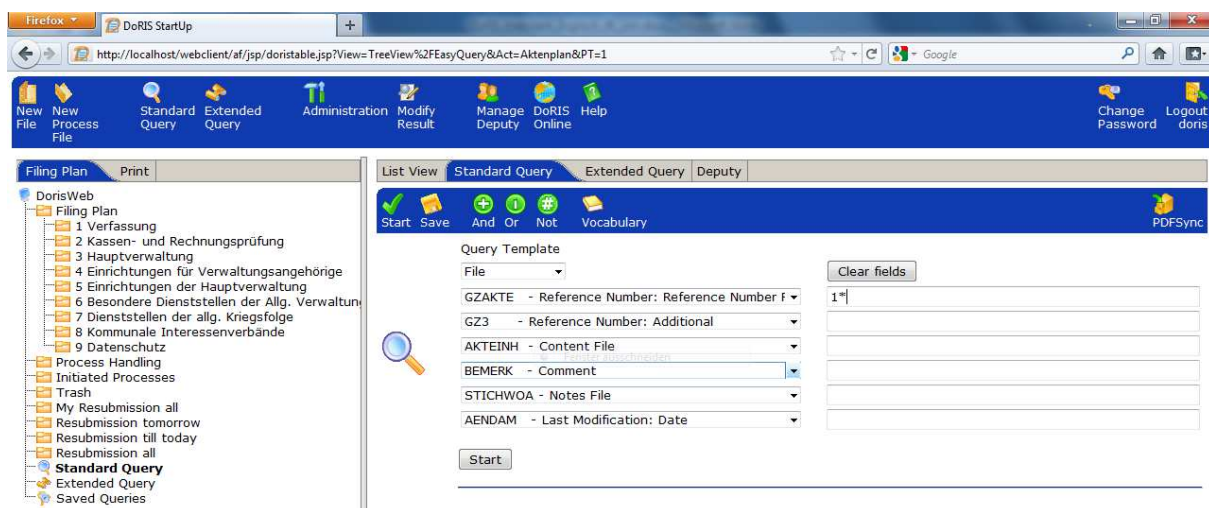
With the feature **DoRIS® PDFSYNC** you have the possibility to take your files as an electronic copy with you, e.g. on your laptop.

Henceforth, you have access to the files anytime, wherever you happen to be working.

Synchronizing Files

If you want to create electronic copies of files, select the files of interest by a standard  or an extended  query.

The Example shows a standard query for the reference number 1*.




The screenshot shows the DoRIS webclient interface in a Firefox browser window. The address bar displays the URL: `http://localhost/webclient/af/jsp/doristable.jsp?view=TreeView%2FEasyQuery&Act=Aktenplan&PT=1`. The interface features a blue navigation bar with icons for 'New File', 'New Process File', 'Standard Query', 'Extended Query', 'Administration', 'Modify Result', 'Manage Deputy', 'DoRIS Online', 'Help', 'Change Password', and 'Logout doris'. Below the navigation bar, there is a 'Filing Plan' tree view on the left and a 'Standard Query' configuration panel on the right. The 'Standard Query' panel includes a 'Query Template' section with a 'File' dropdown menu and a 'Clear fields' button. The template is configured with the following items:

Item	Field	Value
GZAKTE	Reference Number: Reference Number f	1*
GZ3	Reference Number: Additional	
AKTEINH	Content File	
BEMERK	Comment	
STICHWOA	Notes File	
AENDAM	Last Modification: Date	

A 'Start' button is located at the bottom of the configuration panel.

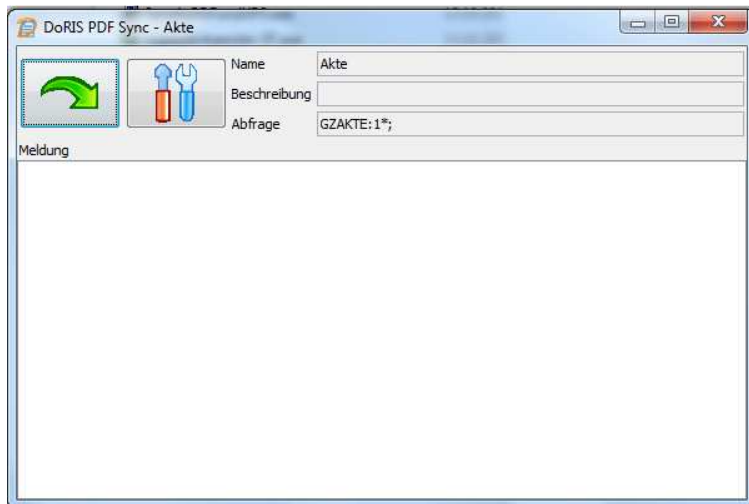
Standard Query

Please download the data  and save the file `PDFSync . jnl.p` at a chosen location on your PC, e.g. your desktop.

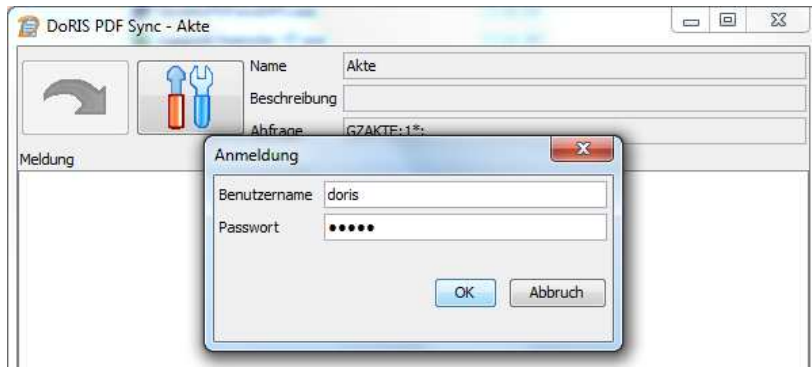
**note**

Whilst downloading the file `PDFSync.jnlp` please select "save file". If you would have selected "open with" you would finally receive an error message.

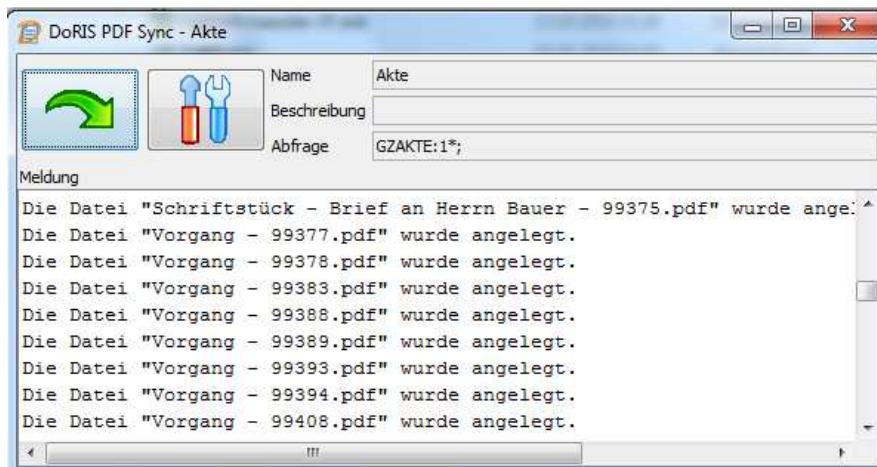
Open the file `PDFSync.jnlp` with a double click and a window for proceeding pops up.



Before you can start the synchronization of the files , you are asked to enter your password again.

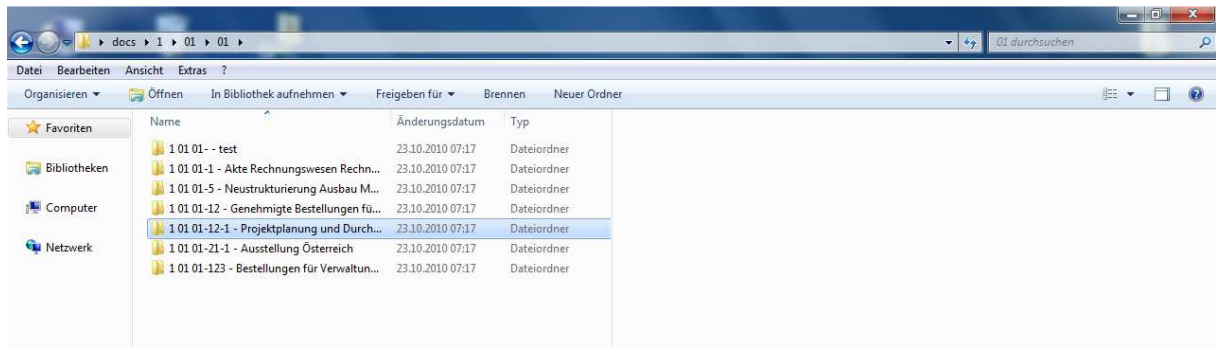
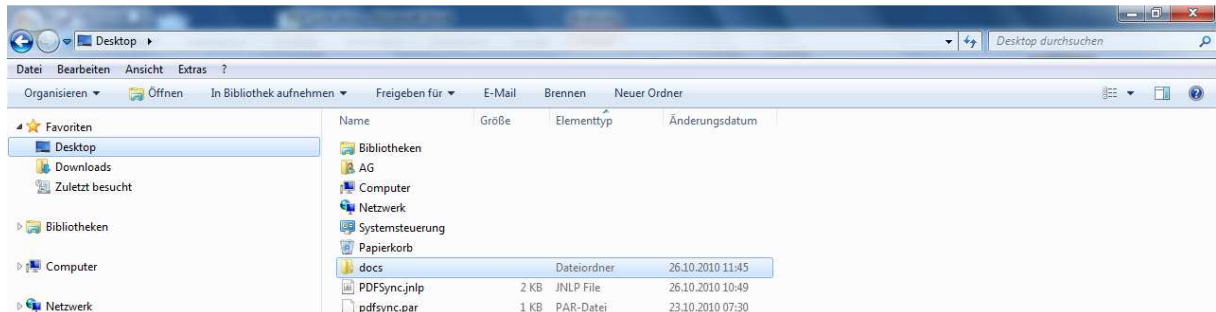


Immediately after you entered your access data, the synchronization starts and the following message is displayed.



View of Copied Files with its Documents

In the new directory docs, you find the selected data in the familiar structure of the filing plan. You can display the records as preview, open or print them.



The screenshot shows the Adobe Reader interface with the file 'Akte - 99374.pdf' selected. The left sidebar shows a file list with columns for Name, Änderungsdatum, and Typ. The main content area displays the document's metadata.

Akte 99374

Geschäftszeichen: 1.01.01-12-1
 Inhalt Akte: Projektplanung und Durchführung
 Bemerkung:
 Standort: Projekt
 Stichworte:
 Empfänger:
 Zugriff:
 Datum Anlage: 08.05.2006

Datum	Registrator	Entleiher	Teil-WV	Hrag am	Bemerkung
24.03.2006	sa		N		
26.03.2006	sa	undefiniert	N	undefiniert	undefiniert

Abgabedatum Empfänger:
 Einzelverfügung Datum Bemerkung:
 Freigabe an (Name) Freigabe an (Kürzel) Freigabe durch (Name) Freigabe durch (Kürzel):
 Laufzeit Beginn:
 Laufzeit Ende:
 Aufbewahrungsdauer (Jahre): 5
 Bandnummer(n):
 Lfd. Nr.: 0

1 von 1

Akte - 99374.pdf Änderungsdatum: 08.05.2007 14:45 Erstelldatum: 20.10.2010 10:06
 Adobe Acrobat Document Größe: 6,74 KB

The screenshot shows the Adobe Reader interface with the file 'Schriftstück - Brief an Herrn Bauer - 9937...' selected. The left sidebar shows a file list with columns for Name, Änderungsdatum, and Typ. The main content area displays the document's metadata.

Schriftstück 99375

Geschäftszeichen: 1.01.01-12-1
 Einsender:
 OZ Einsender:
 Inhalt: Brief an Herrn Bauer
 Bemerkung: Anlagen Bemerkung
 Stichworte:
 Empfänger:
 Zugriff:
 Datum Schreiben: 08.05.2006
 Datum Anlage: 08.05.2006


Datum	Registrator	Entleiher	Teil-WV	Hrag am	Bemerkung

Abgabedatum Empfänger:
 Einzelverfügung Datum Bemerkung:
 Freigabe an (Name) Freigabe an (Kürzel) Freigabe durch (Name) Freigabe durch (Kürzel):


1 von 2

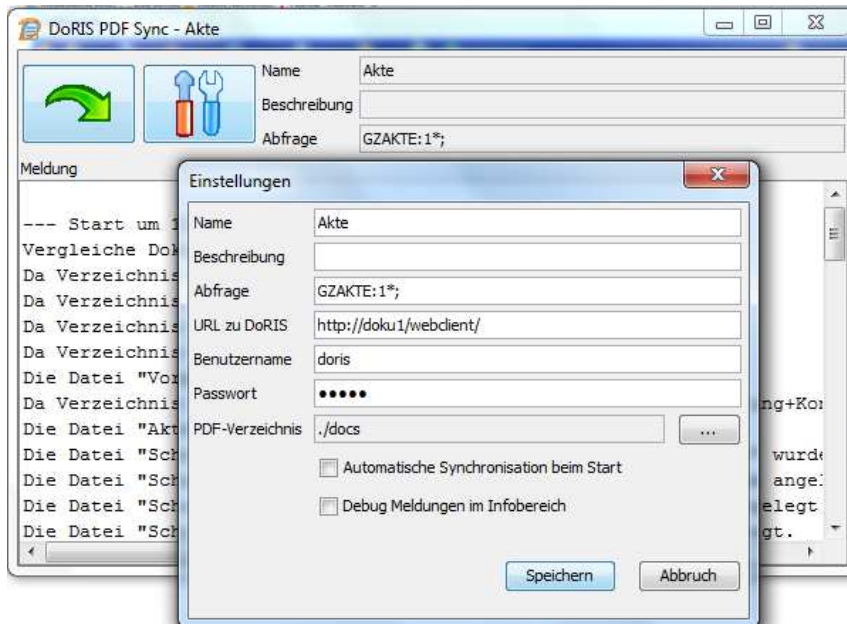
Schriftstück - Brief an Herrn Bauer - 9937... Änderungsdatum: 31.05.2010 11:06 Erstelldatum: 20.10.2010 10:06
 Adobe Acrobat Document Größe: 68,8 KB


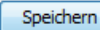
Using Settings

Further queries, settings or changes can be performed with settings .

note

Anyhow, you could always start a query directly in DoRIS with  - for description see above.



To perform a query by means of settings , please enter the according data in the fields name (Name) and query (Abfrage). In the field PDF-directory (PDF-Verzeichnis) you can determine the location where to save PDFSync . jnl.p. Sart  the query and download the data.

Would you always like to be up-to-date? Then just check “Automatische Synchronisation beim Start”. Whenever you start DoRIS, data are automatically synchronized.

If you may need an error analysis you could display the debug-messages in the window ‘DoRIS PFD Sync – Akte’ in the area of the text message (screen see above). In this case please check “Debug Meldungen im Infobereich”.

- Automatische Synchronisation beim Start
- Debug Meldungen im Infobereich

Whenever you perform changes in the settings, they are recorded in a parameter-file . par .

note

The administrator can edit the PDFSync . jnl.p file directly via editor.


EXAMPLE CASES

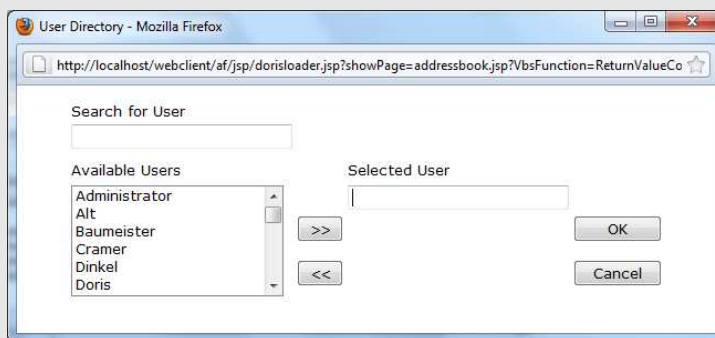
The following examples show the basics of process handling. Therefore, simple situations are described; in your environment even more complex processes may occur. Please note that the persons and situations described are entirely fictitious.

Here you find a general note for the entry of usernames since these fields are often used during process handling and defining workflows.

note

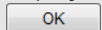
Accessibility tools for usernames, e.g. in the column Who of a workflow:

- Either you directly type in the username in the appropriate field; after typing the first letter of the name you could also select the name from the list of proposed names,
- or you select the name from the user directory .



user directory


Select the user from the directory list **Available Users**. If a user was previously selected, its username is already displayed in the field **Selected User**. Apply your selection





Incoming Mail – Initiating Processes

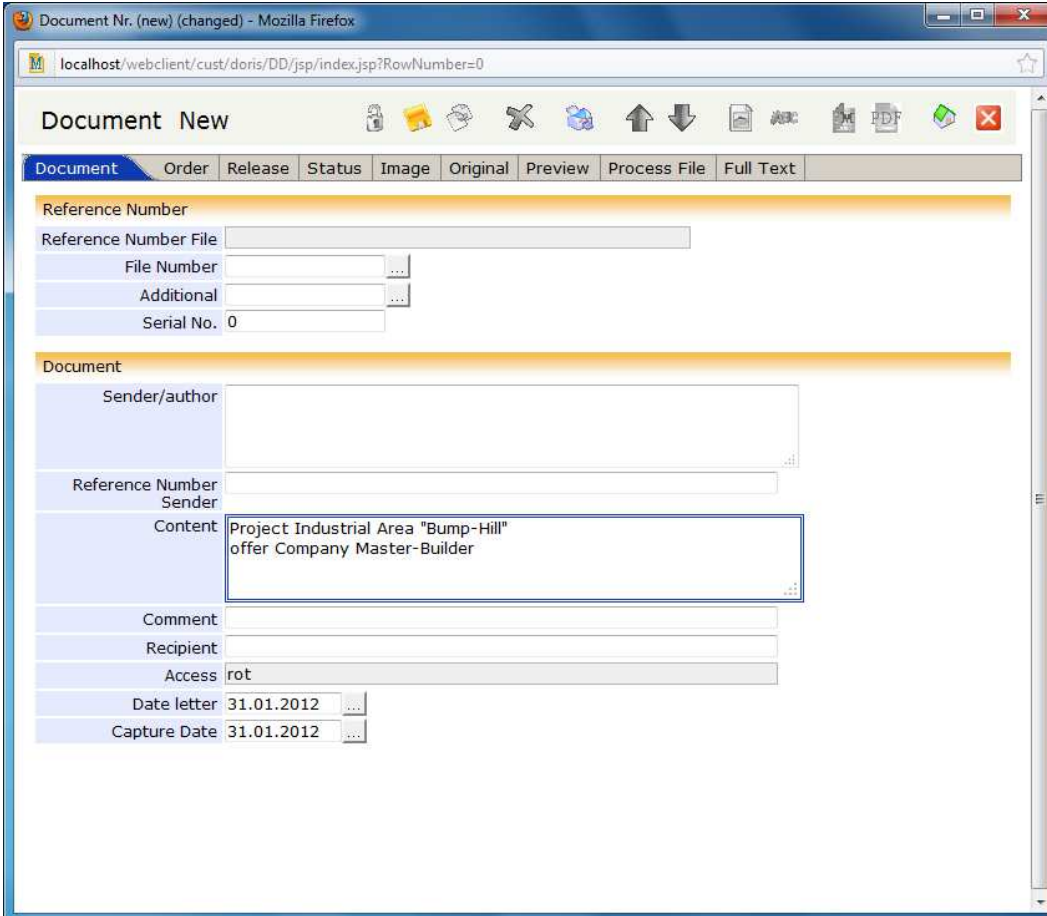
Here you are shown how incoming mail is sent by the central mail office or in any office that handles incoming mail to the respective departments. The distribution of the mail is handled with a process file. Regardless of further processing the first step of a process is the registration of the incoming mail. It does not matter if the incoming mail is registered as described in this example or due to high volume of incoming mail by batch scanning.

Initiating processes – mail office / registry

The registrar, Mr. Rot, works in the mail office and creates a new process file . He fills in the appropriate fields, considering the field content as mandatory; whereas a reference number has not to be added yet. Furthermore, Mr. Rot defines a workflow: he adds the secretary of the department in charge, Mr. Cramer, and assigns the action “forward” to her. Finally, he attaches a document:

- Either he creates a new document .

A window to register the document pops up. Mr. Red enters the dates of the document, considering the content as mandatory again - if applies, the content may be the same compared to the process file. Afterwards he attaches the document by scanning in tab “Image” and saves  his changes.



Document Nr. (new) (changed) - Mozilla Firefox

localhost/webclient/cust/doris/DD/jsp/index.jsp?RowNumber=0

Document New

Document | Order | Release | Status | Image | Original | Preview | Process File | Full Text

Reference Number

Reference Number File

File Number

Additional

Serial No. 0

Document

Sender/author

Reference Number

Sender

Content: Project Industrial Area "Bump-Hill" offer Company Master-Builder

Comment

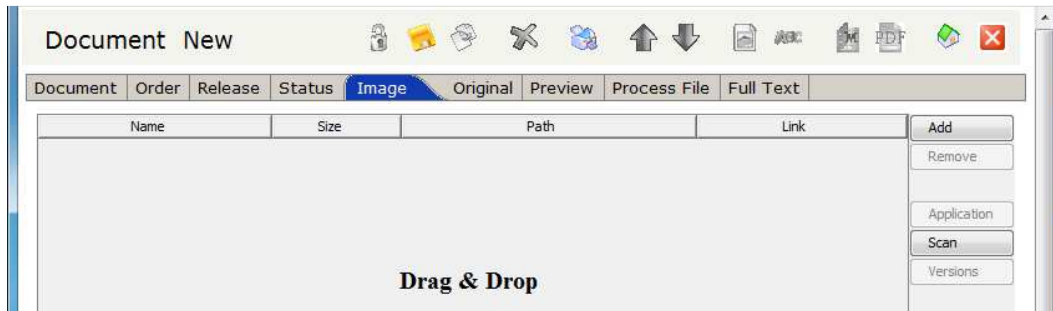
Recipient

Access: rot


Date letter: 31.01.2012

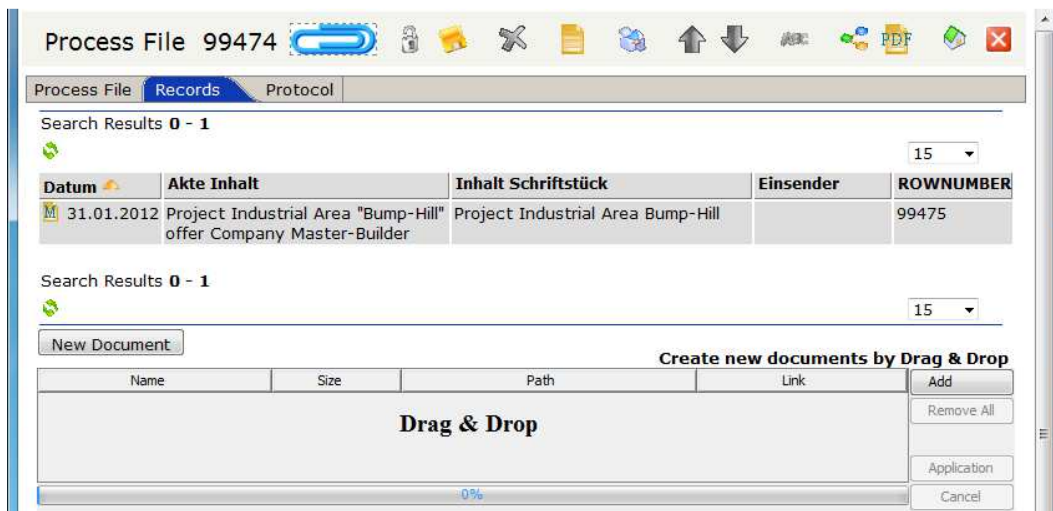
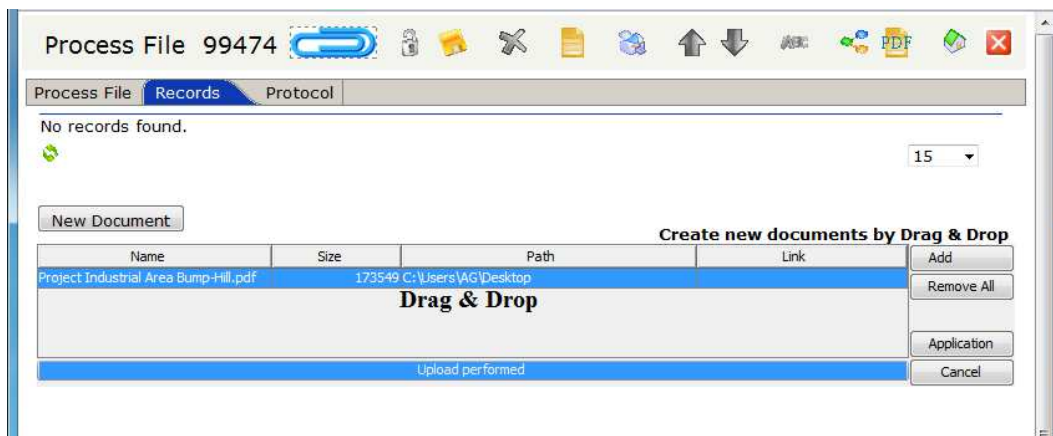
Capture Date: 31.01.2012

new document



tab image

- Or he attaches on tab "Records" of the process file the electronic document by "Drag & Drop". Once Mr. Rot saves the process file , the documents are removed from the "Drag & Drop"-list to the upper list of attached records.



When Mr. Rot is ready defining and entering data, he initiates the process .

The screenshot shows a web browser window titled "Process File Nr. 99474 - Mozilla Firefox". The address bar shows "localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99474". The page title is "Process File 99474".

The form is divided into several sections:

- Reference Number:** Includes fields for "Reference No. of File", "File Number", "Additional", "Serial No." (value: 0), and "Year" (value: 0).
- Process:** Includes a "Content" text area with the text "Project Industrial Area 'Bump-Hill' offer Company Master-Builder", "Resubmission Date", "Resubmission for" (with "ID" dropdown), "Notes", "Capture Date" (value: 31.01.2012), "Presentor" (value: Rot, with "ID" dropdown), and a "Comment" text area.
- Workflow:** A table with columns "Step", "Who", "Action", and "Comment". One row is visible: Step 1, Who: Cramer, Action: Forward.
- Forward:** Includes a "New line" button.


The registrar initiates a process and sends it for forwarding to the person responsible

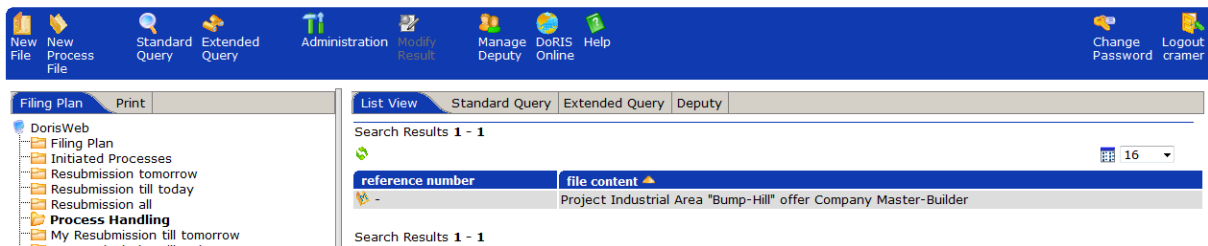
Mail Distribution and simple Handling of Processes

In this example case you are shown the steps of processing of the registered mail all the way to the person responsible:

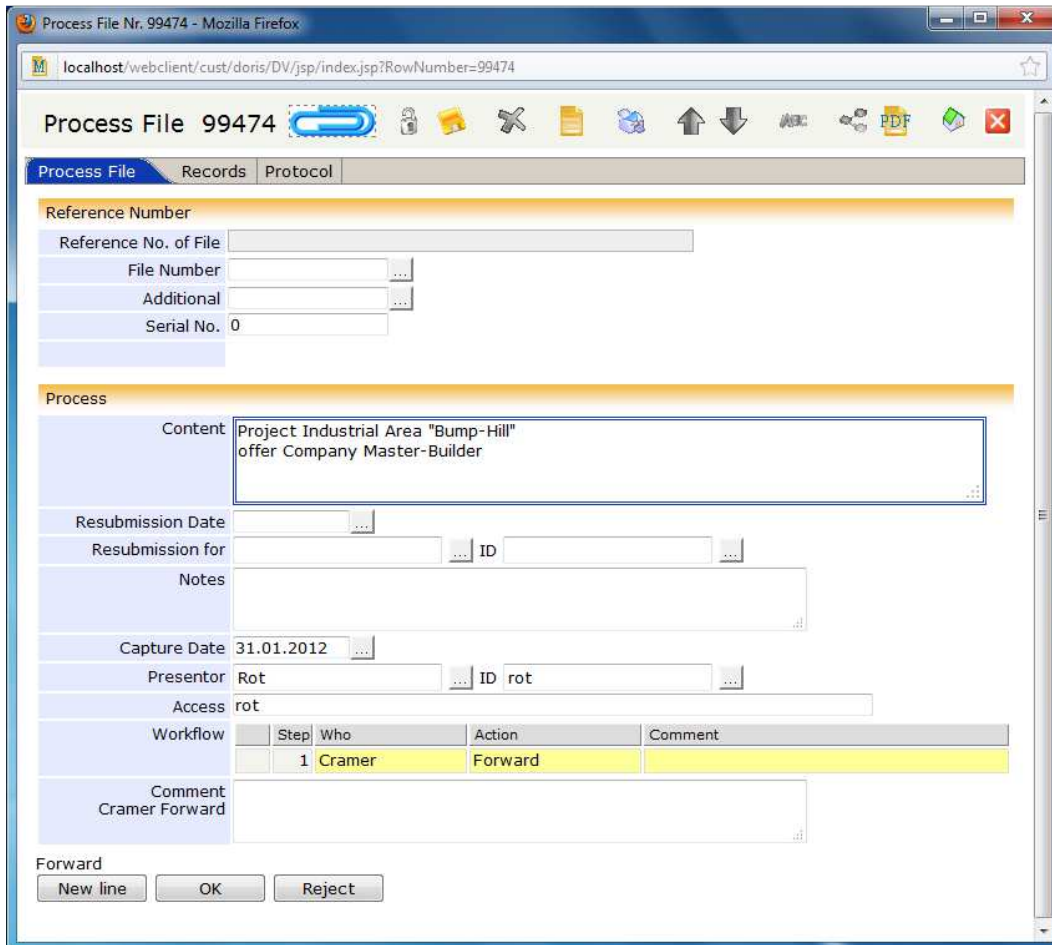
As described above the incoming mail is registered and processed in the central mail office. The records are forwarded by a process file to the appropriate department. Here, the secretary informs the head of department and engages the person responsible to edit the process file.

Extending and Forwarding of Process Files – Secretary

The secretary, Mrs. Cramer, finds the process file in her folder **Processes Handling**, furthermore she receives an e-mail message about the incoming process file. For editing she opens and unlocks  the process file first.



Folder Process Handling of the person being next in the workflow

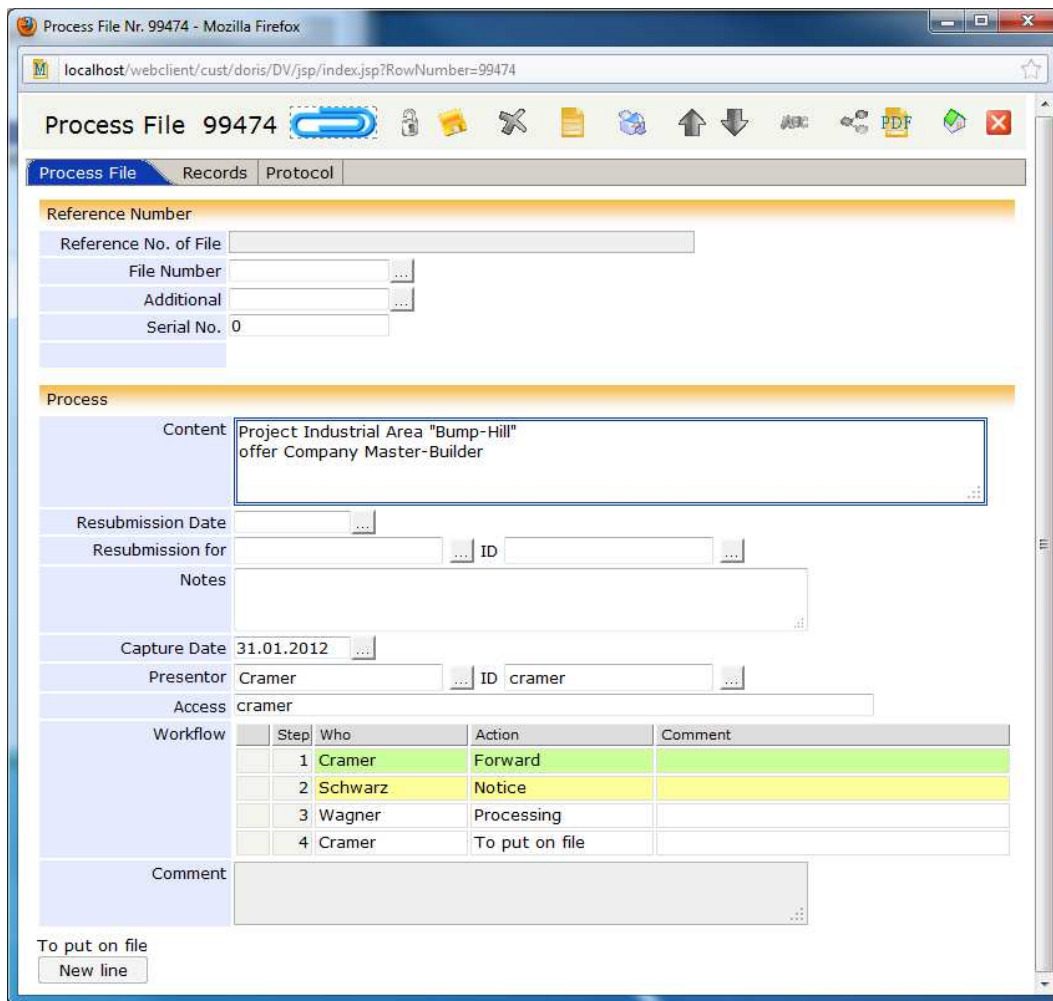


Process opened from the folder Process Handling

Mrs. Cramer has to inform the management about the process file and engages the person responsible to process:

She adds new lines in the workflow enters Mr. Schwarz (head of department) for “Notice” and assigns “Processing” to the person in charge, Mr. Wagner. For detailed description of the task or for further information she could add comments. In order to finally put the process file on file, Mrs. Cramer assigns “put on file” as the last step of the workflow to herself.

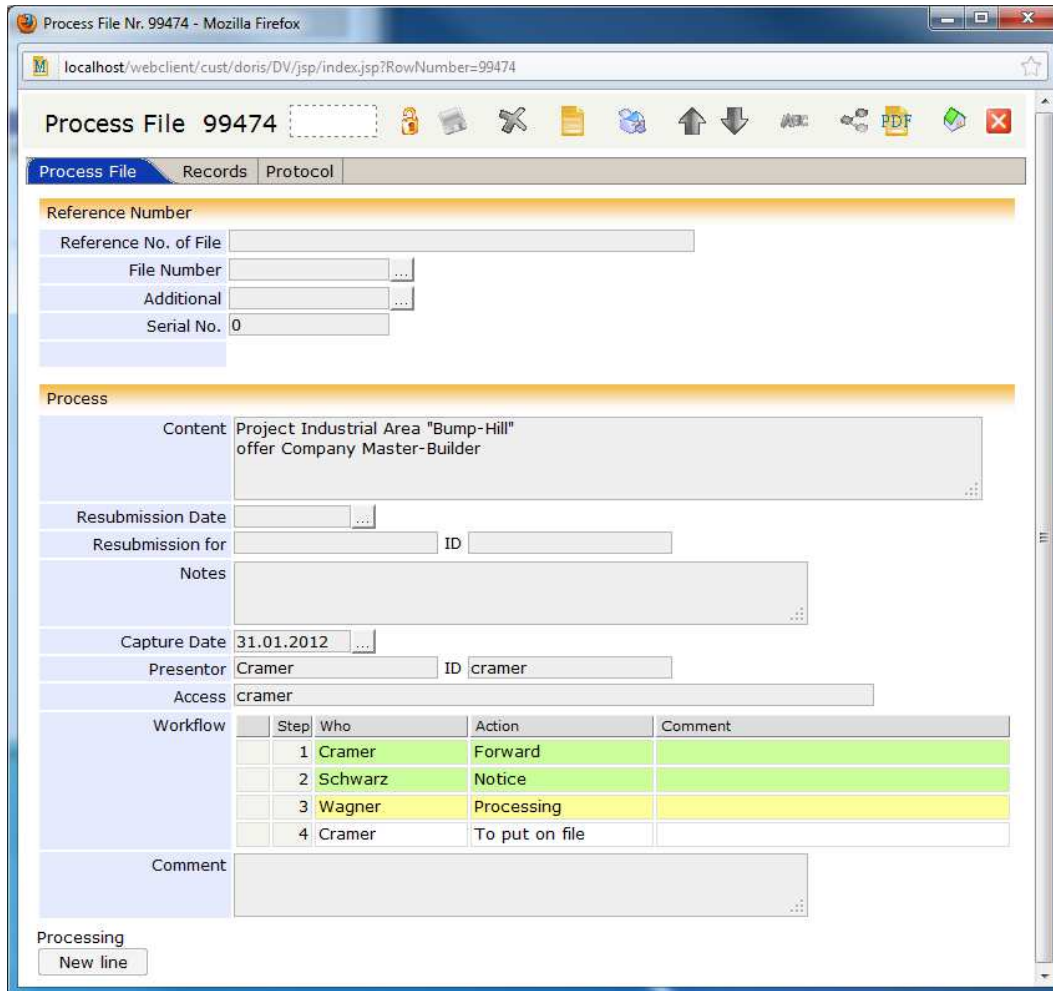
The default setting of the field `Presentor` is the name of the registrar, here: Mr. Rot. A rejected or fully processed process will be sent back to the initiator (as shown in the field `Presentor`). Now Mrs. Cramer changes the name of the presentor in order to receive rejected or fully processed process file by herself.



Extending and forwarding process files

Notice – Head of Department

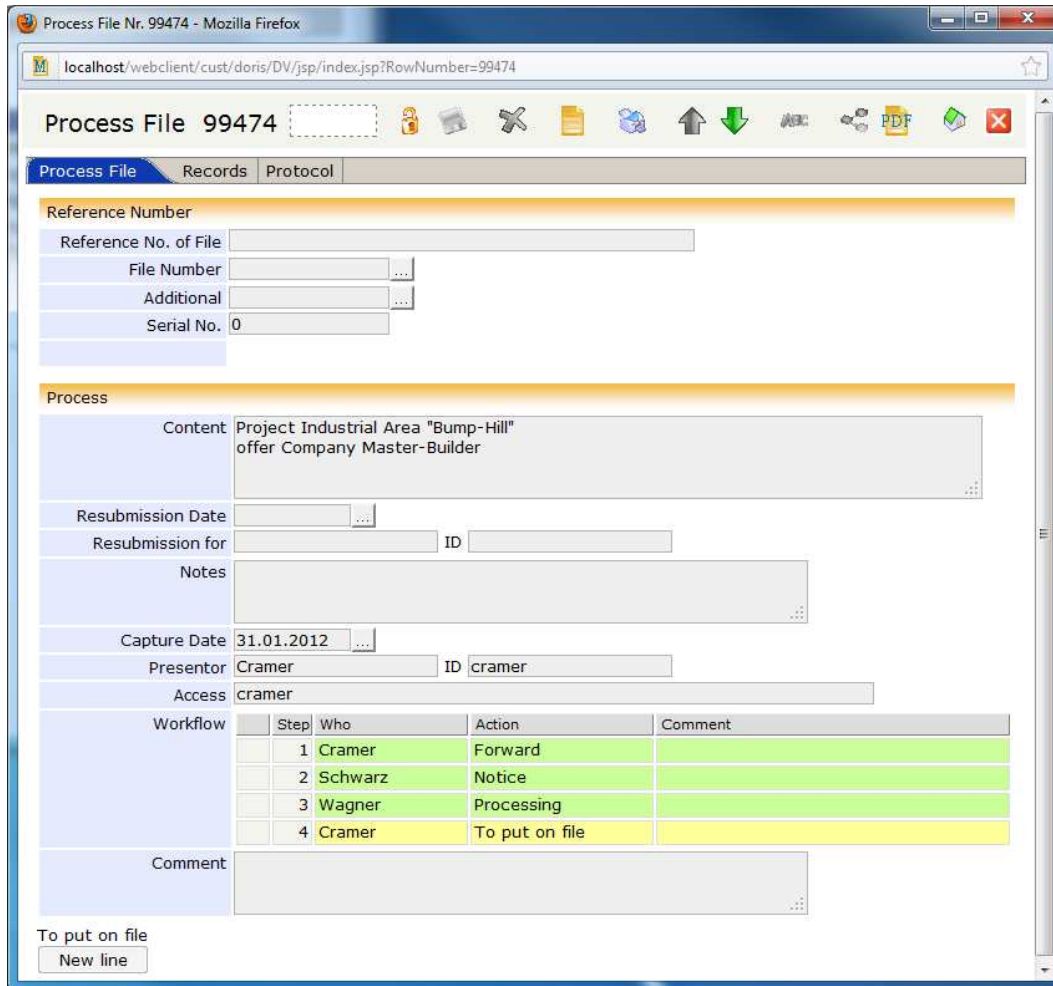
The head of department, Mr. Schwarz, finds the process file in his folder **Processes Handling**, furthermore he receives an e-mail message about the incoming process file. After he noticed the process , it will be automatically forwarded to the person responsible, Mr. Wagner.



Notice

Processing – Person Responsible

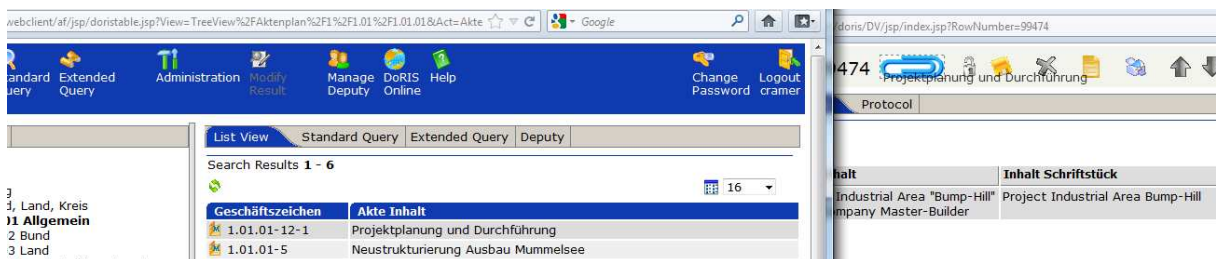
Mr. Wagner also receives the process file in his folder **Processes Handling**, furthermore he receives an e-mail message about the incoming process file, too. He fulfills his task and forwards the process file along the defined workflow .

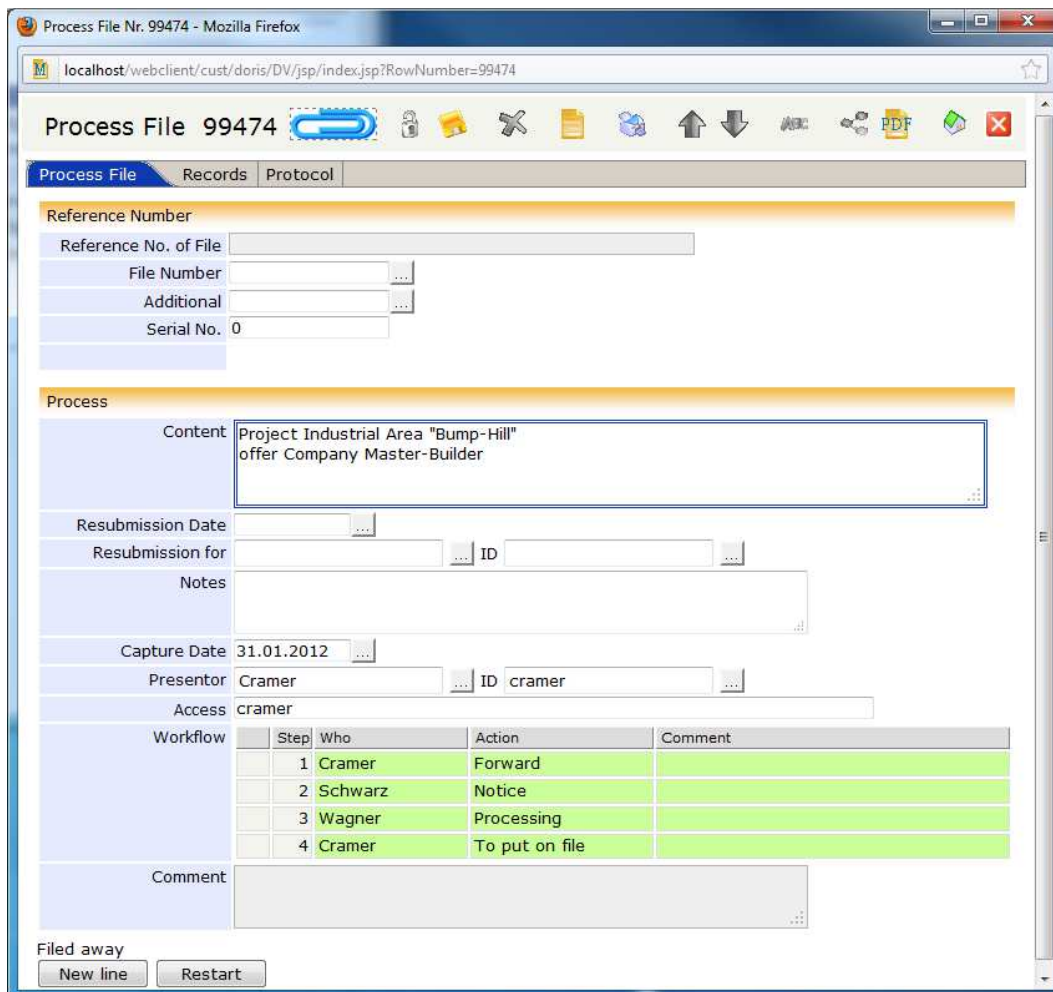
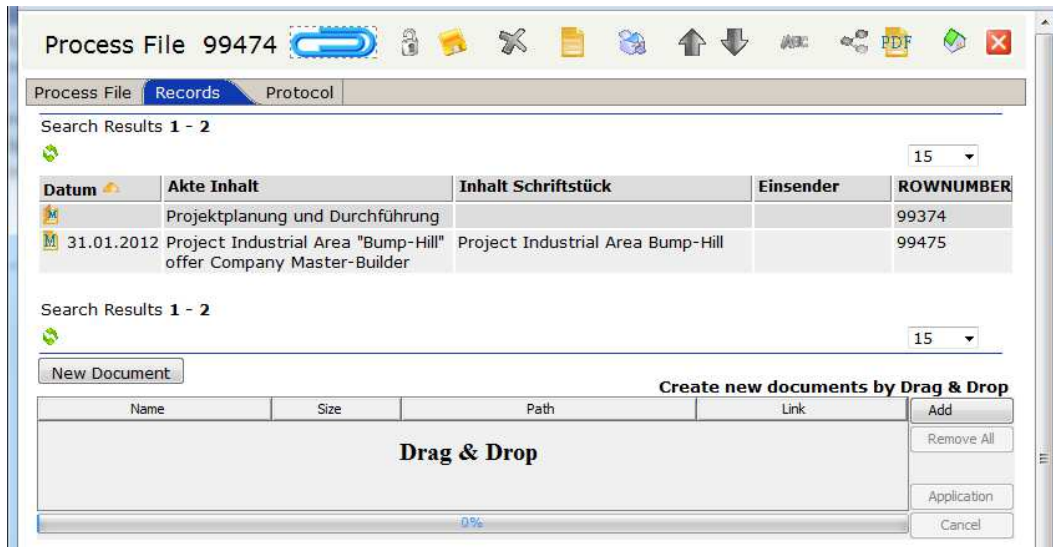


Processing by the person responsible

Put on File - Secretary

At the end, Mr. Cramer puts the process file on file. At the latest at this point of processing Mrs. Cramer assigns a file and the corresponding reference number to the process file.





Put process file on file

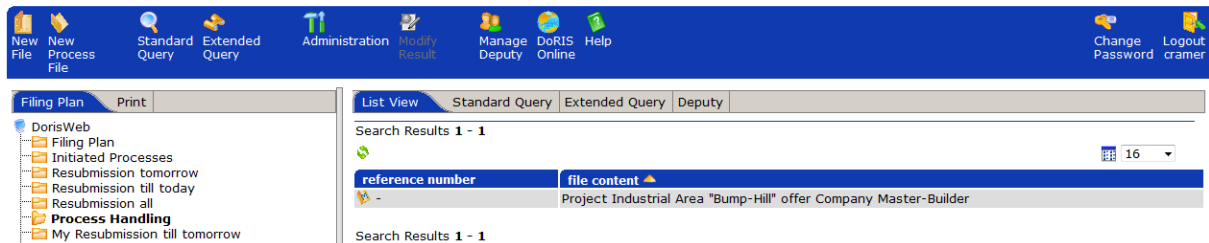
Mail Distribution and Rejecting of a Process File

In the example case you are shown the rejection of a process file:

As described above the incoming mail is registered and processed in the central mail office. The records are forwarded by a process file to the department in charge. However, the secretary rejects the process file.

Rejecting a Process File - Secretary

The secretary, Mrs. Cramer, finds the process file in her folder **Processes Handling**; furthermore she receives an e-mail message about the incoming process file. For processing she opens and unlocks the process file first.



Folder Process Handling of the person being next in the workflow

Mrs. Cramer rejects the process file since her department is not responsible for the industrial area "Bump- Hill". She adds a comment in order to inform Mr. Rot about the responsibilities. The Process file is returned to the registrar (and presentor) Mr. Rot.

Capture Date	13.02.2012								
Presentor	Rot ID rot								
Access	rot								
Workflow	<table border="1"> <thead> <tr> <th>Step</th> <th>Who</th> <th>Action</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Cramer</td> <td>Forward</td> <td></td> </tr> </tbody> </table>	Step	Who	Action	Comment	1	Cramer	Forward	
Step	Who	Action	Comment						
1	Cramer	Forward							
Comment Cramer Forward	The department MA-Ind is responsible for the industrial area "Bump Hill". Please forward to Mrs. Fischer								

Forward

New line OK Reject

Process File Nr. 99479 - Mozilla Firefox

localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99479

Process File 99479

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content

Resubmission Date

Resubmission for ID

Notes

Capture Date 13.02.2012

Presentor Rot ID rot

Access rot

Workflow	Step	Who	Action	Comment
	1	Cramer	Forward	The department MA-Ind is responsible for the industrial area "Bump Hill". Please forward to Mrs. Fischer
	2	Rot	Rejected	

Comment

Rejected

New line

Rejecting a process file

Re-Starting a Process File– Initiator of the Process File

The initiator of the process finds the rejected process file in the folder **Processes Handling**: Furthermore, he receives an e-mail message about the incoming process file. Mr. Rot restarts

Restart the process file and sends it to the department responsible.

Capture Date 13.02.2012 ...				
Presenter Rot ...		ID rot ...		
Workflow	Step	Who	Action	Comment
	1	Cramer	Forward	The department MA-Ind is responsible for the industrial area "Bump Hill". Please forward to Mrs. Fischer
	2	Rot	Rejected	
Comment Rot Rejected				

Rejected

Process File 99479

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Year 0

Process

Content: Project Industrial Area "Bump-Hill" offer Company Master-Builder

Resubmission Date

Resubmission for

Notes

Capture Date 13.02.2012 ...

Presenter Rot ... ID rot ...

Workflow	Step	Who	Action	Comment
	1	Cramer	Forward	The department MA-Ind is responsible for the industrial area "Bump Hill". Please forward to Mrs. Fischer
	2	Rot	Rejected	
	3	Fischer	Forward	

Comment

Forward

note

Mrs. Cramer knows that her department is not handling the project of this industrial area. Since she is familiar with the responsibilities in the company, she directly sends the process file to the department in charge. She also informs Mr. Rot about the responsibilities regarding this project. Now Mr. Rot is also well informed and for future processes concerning the industrial area "Bump-Hill" he will send it directly to Mrs. Fischer. The process file is now in Mrs. Fischer's and Mr. Rot's folder Process Handling.

Process File 99478

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content: Project Industrial Area "Bump-Hill" offer Company Master-Builder

Resubmission Date

Resubmission for ID

Notes

Capture Date: 13.02.2012

Presenter: Rot ID: rot

Access: rot

Step	Who	Action	Comment
1	Cramer	Forward	The department MA-Ind is responsible for the industrial area "Bump Hill".
2	Fischer	Forward	
	Rot	Notice	

Comment

Forward

New line

Forwarding the process file to the person responsible and informing the initiator


Mail Distribution and Rejecting during Process Handling

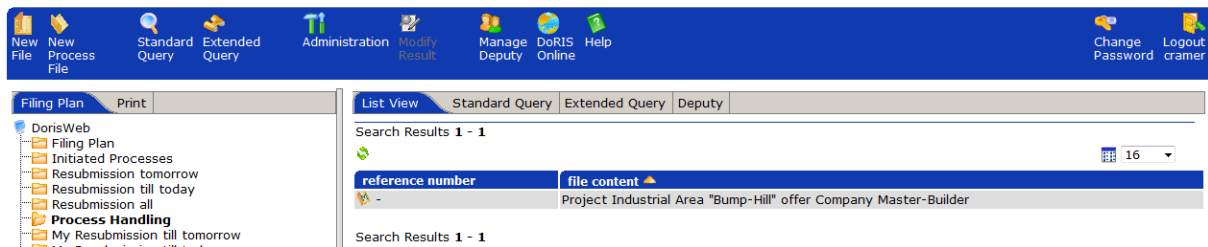
Here the rejection of a process file during further processing of the workflow is described.

In the central mail office the incoming mail is registered and processed as described above. The records are forwarded by a process file to the department in charge.

The secretary informs the head of department and engages the person in charge to edit the process. However, the management rejects the process file since the responsibilities have changed on short notice.

Extending and Forwarding of Process Files – Secretary

The secretary, Mrs. Cramer, finds the process file in her folder `Processes Handling`. Furthermore, she receives an e-mail message about the incoming process file. For editing she opens and unlocks  the process file first.



Folder `Process Handling` of the person being next in the workflow

» The project of this industrial area seems to make good progress. I go ahead and inform our boss and ask Mr. Wagner to work on this matter. «

Mrs. Cramer defines the workflow accordingly. Before she starts the process she enters herself as presenter.

Process File Nr. 99476 - Mozilla Firefox

localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99476

Process File 99476

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number ...

Additional ...

Serial No. 0

Process

Content

Resubmission Date ...

Resubmission for ... ID ...

Notes

Capture Date 13.02.2012 ...

Presentor Cramer ... ID cramer ...

Access

Workflow


Step	Who	Action	Comment
1	Cramer	Forward	
2	Schwarz	Notice	
3	Wagner	Processing	

Comment

Notice

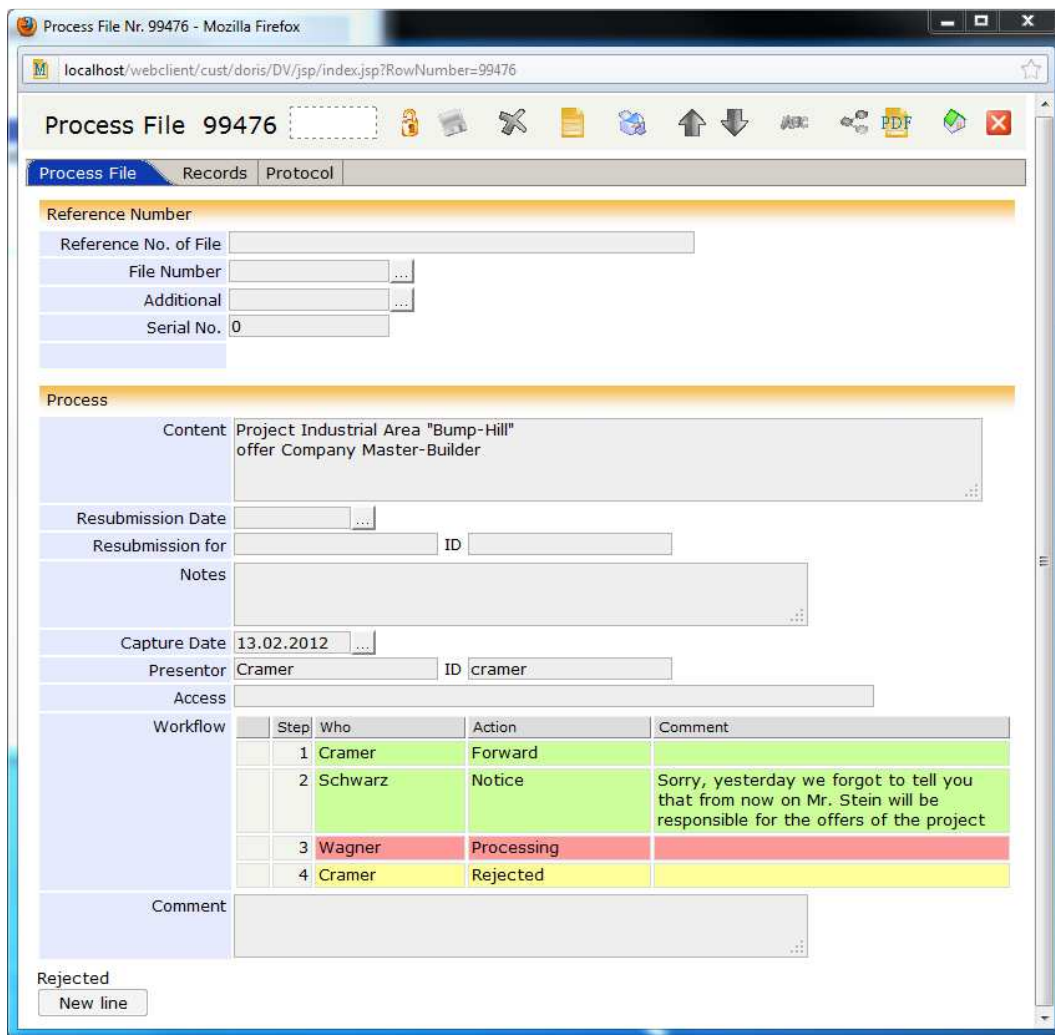
Extending and forwarding the workflow

Rejecting – Head of Department

The head of department, Mr. Schwarz, finds the process file in his folder **Processes Handling**. Furthermore, he receives an e-mail message about the incoming process file. For processing he opens and unlocks  the process file first.

» Well, the offer of Master-Builder is finally available, too. Mr. Stein can directly start working on this. Oh, we totally forgot to let our beloved Mr. Cramer know about the change in responsibilities... «

Unfortunately, Mr. Schwarz has no time to adjust the workflow. This is why he just rejects the process file and informs Mrs. Cramer (with a note in comments) that since yesterday’s meeting the responsibilities have changed.



Rejecting a process file – with comment

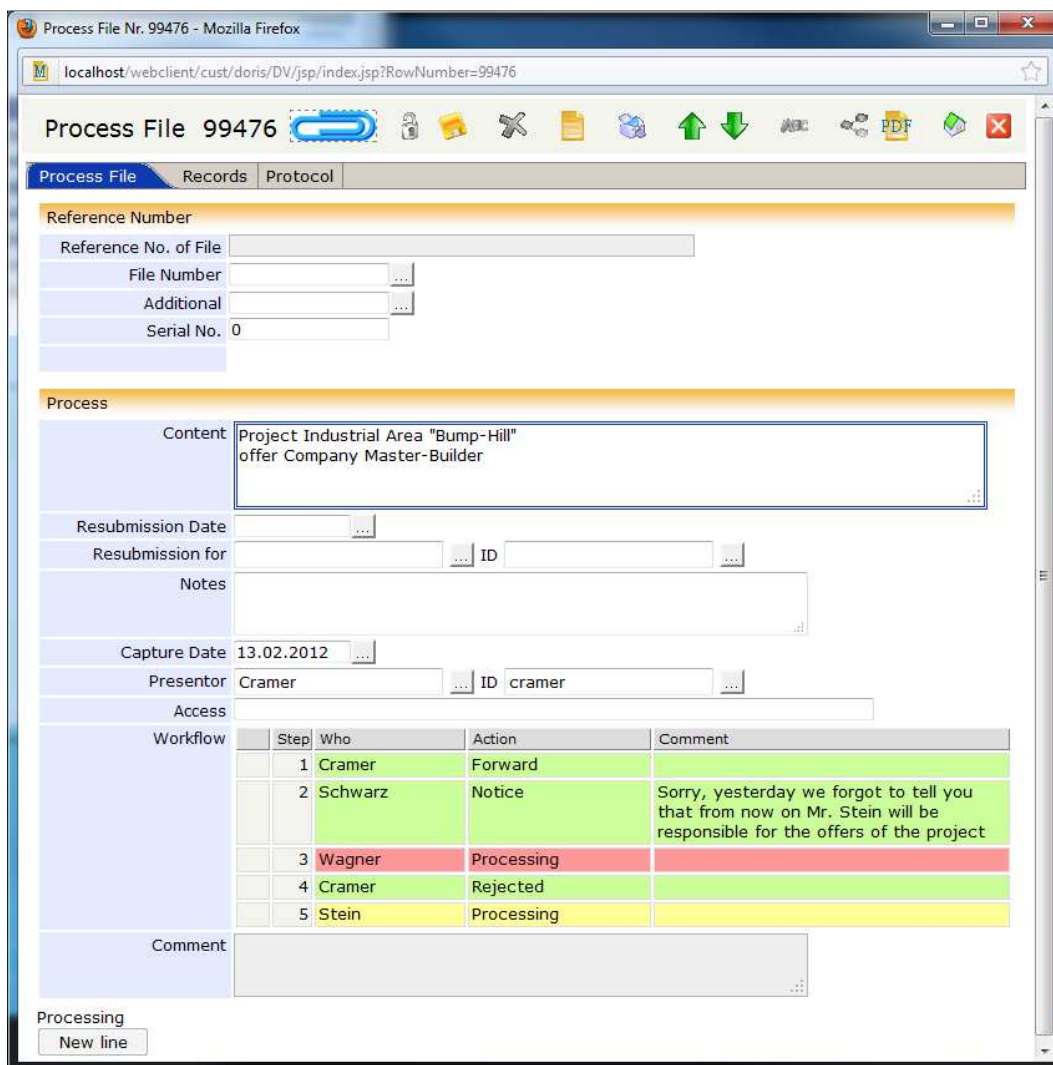
Extending and Restarting a Process File – Secretary

The process file is returned to Mrs. Cramer and she finds it in her folder **Process Handling**; furthermore, she receives an e-mail note about the incoming process file. (Since she defined herself as presentor, the process file is returned to her. Otherwise if she would have left the entry of the registry, the process file would have been returned to the registry.)

Because of the colour-code Mrs. Cramer recognizes that Mr. Schwarz noticed the process file (green) though Mr. Wager did not receive it (rot).

» Well, how should I know. OK, it is Mr. Stein´s turn now... «

Mrs. Cramer prolongs the workflow **new line** and engages Mr. Stein to edit the process file before she restarts the process file **Restart**.




Extending and restarting the process file

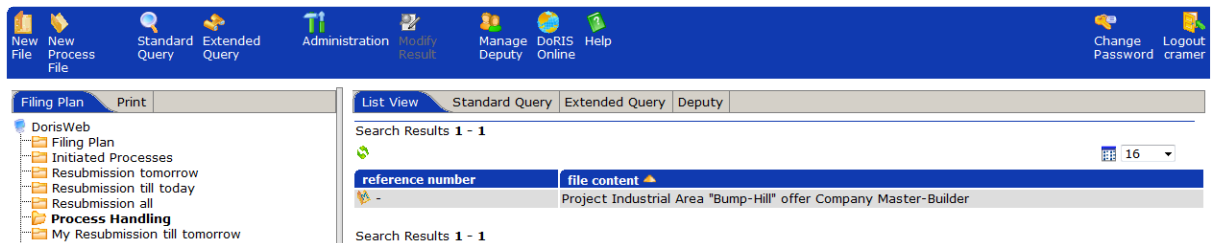
Mail Distribution and Simultaneous Delivery of a Process File

In the example case you are shown the processing-steps with simultaneous delivery of the registered mail all the way to the person responsible.

As described above the incoming mail is registered and processed in the central mail office. The records are forwarded by a process file to the department in charge. Here, the secretary informs the head of department and its deputy at the same time and engages the person responsible to edit the process file.

Extending and Forwarding of Process Files with Simultaneous Delivery – Secretary

The secretary, Mrs. Cramer, finds the process file in her folder `Processes Handling`; furthermore, she receives an e-mail message about the incoming process file. For processing she opens and unlocks  the process file first.



Folder Process Handling of the person being next in the workflow

Mrs. Cramer has to inform the head of department and its deputy of the process file at the same time. In addition she engages the person responsible to edit the process.

Therefore, she extends the workflow and adds Mr. Schwarz (manager) as well as Mrs. Weiss (deputy manager) for “notice”. For simultaneous delivery, Mrs. Cramer assigns the same number in field “step” of the workflow to both of them. Mr. Wager is assigned to “Processing”. For further information Mrs. Cramer could add comments.

The default setting of the field `Presentor` is the name of the registrar, here: Mr. Rot.

A rejected or completed process file will be sent back to the initiator (as shown in the field `Presentor`). Now Mrs. Cramer changes the name of the presentor in order to receive rejected or fully processed process files by herself.

Process File Nr. 99477 - Mozilla Firefox

localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99477

Process File 99477

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content

Resubmission Date

Resubmission for ID

Notes

Capture Date 13.02.2012

Presentor Cramer ID cramer

Access

Workflow

Step	Who	Action	Comment
1	Cramer	Forward	
2	Schwarz	Notice	
	Weiss	Notice	
3	Wagner	Processing	


Comment


Notice

Extending workflow and forwarding with partial simultaneous delivery

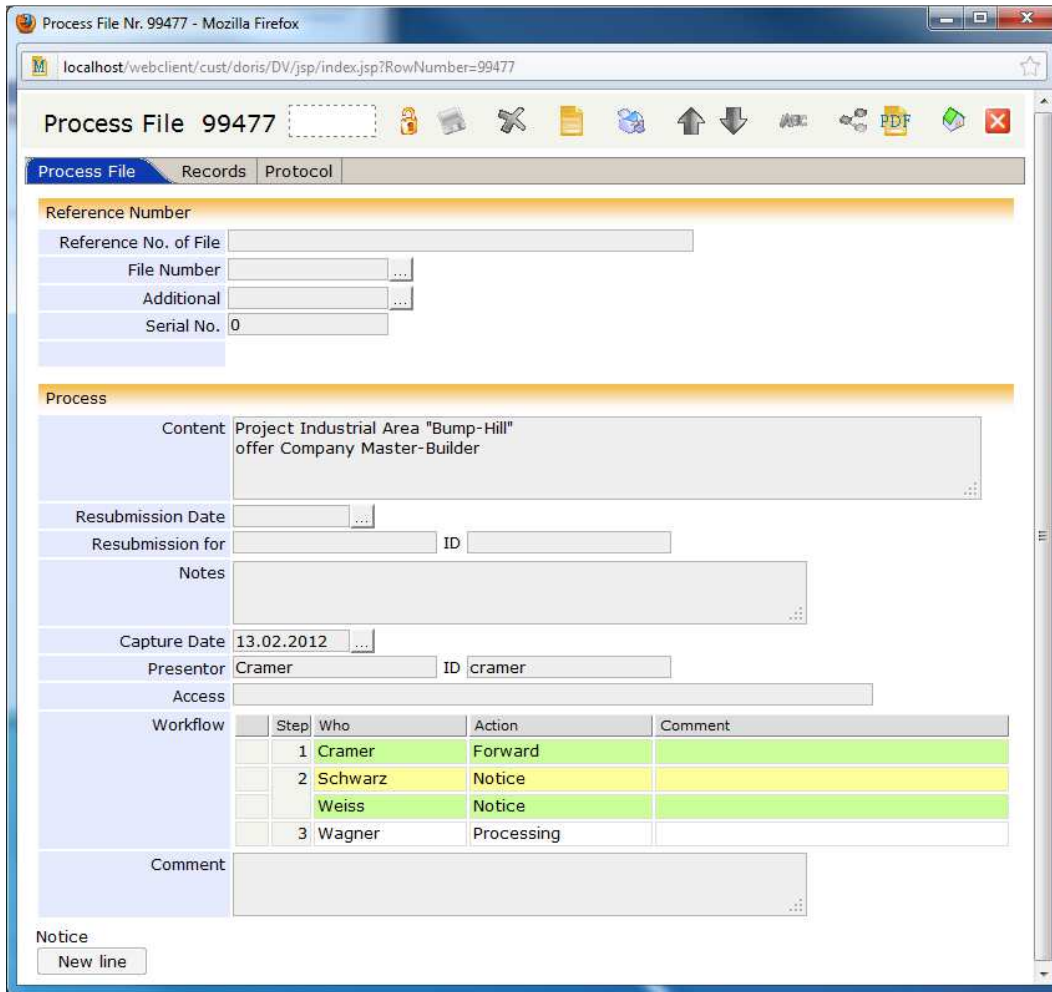
Notice with Simultaneous Delivery – Management

The manager, Mr. Schwarz, and his deputy, Mrs. Weiss, find the process file in their folder `Processes Handling`; furthermore, they receive an e-mail message about the incoming process file. For

processing they open and unlock  the process file first.

After **both**, the manager and his deputy, noticed the process file , it will be forwarded along the workflow to the person responsible.

Further processing is described in the first example.



Process File Nr. 99477 - Mozilla Firefox

localhost/webclient/cust/doris/DV/jsp/index.jsp?RowNumber=99477

Process File 99477

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number ...

Additional ...

Serial No. 0

Process

Content Project Industrial Area "Bump-Hill"
offer Company Master-Builder

Resubmission Date ...

Resubmission for ID

Notes ...

Capture Date 13.02.2012 ...

Presenter Cramer ID cramer

Access

Workflow

Step	Who	Action	Comment
1	Cramer	Forward	
2	Weiss	Notice	
	Schwarz	Notice	
3	Wagner	Processing	

Comment ...

Processing

New line

Notice by management

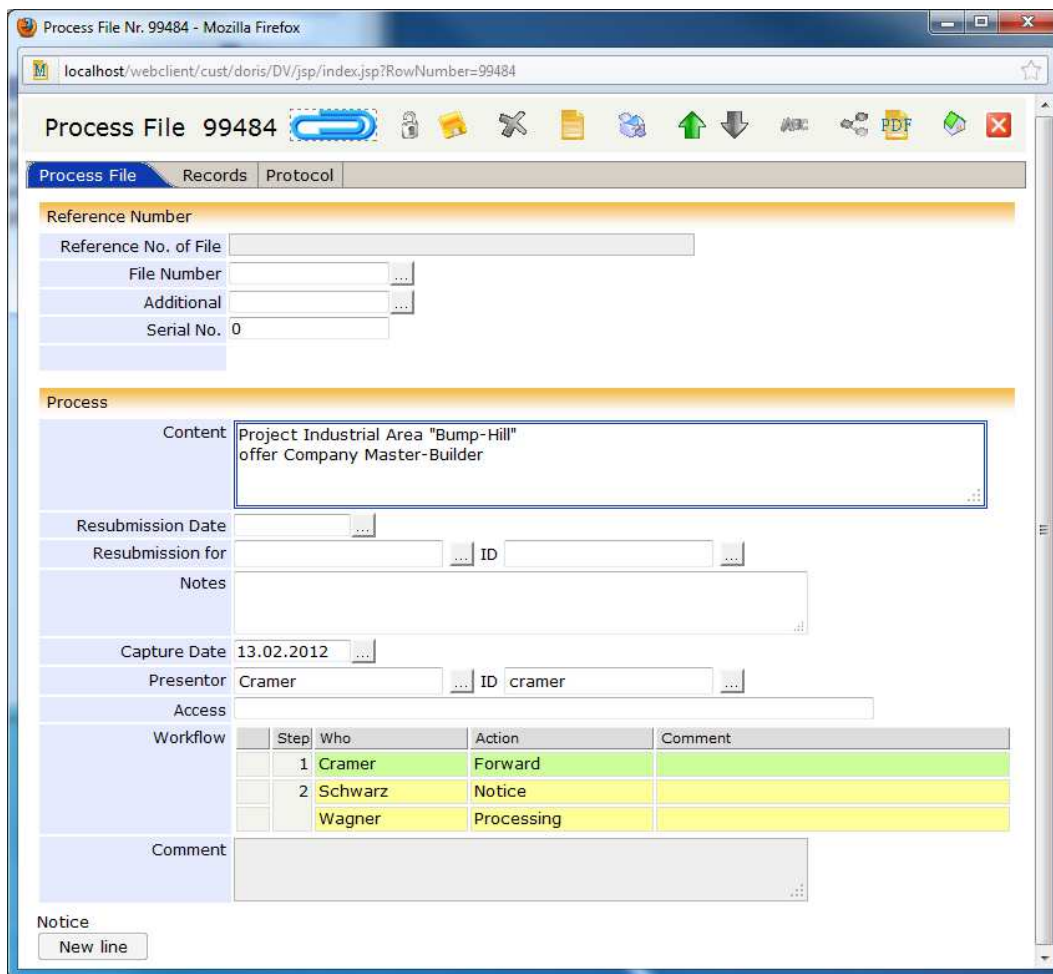
Note

Simultaneous Delivery can also be used e.g. if the processing is urgent. Here it is shown based on the above described example:

The registrar, Mr. Rot, initiates the process file and sends it to Mrs. Cramer for forwarding.

» It´s about time! All offers are available now. So, Mr. Wagner can start working. «

Though, the manager is in an important meeting today. In order not to waste time, Mrs. Cramer informs the manager and at the same time she engages Mr. Wagner to edit the process.



Extending workflow and forwarding with simultaneous delivery

Process File 99484

Process File | Records | Protocol

Reference Number

Reference No. of File

File Number

Additional

Serial No. 0

Process

Content: Project Industrial Area "Bump-Hill"
offer Company Master-Builder

Resubmission Date

Resubmission for ID

Notes

Capture Date 13.02.2012

Presenter Cramer ID cramer

Access

Step	Who	Action	Comment
1	Cramer	Forward	
2	Schwarz	Notice	
	Wagner	Processing	

Comment

Notice
New line

Processing of a process file with simultaneous delivery

Only after both, Mr. Schwarz and Mr. Wagner, confirmed their action, the process file is returned to Mrs. Cramer.

Batch Scanning with the Scanner Workplace

The ideal solution for companies with high volume of incoming mail is to register by batch scanning with the so called DoRIS PDF Scanner-Workplace.

This is a very efficient method: the processing of incoming documents minimizes to the application of the printed barcode on the according document. For batch scanning the documents are forwarded to the DoRIS PDF Scanner-Workplace.



note

The DoRIS PDF Scanner-Workplace is designed for the efficient processing of documents. The processing-steps of the users are minimized. Therefore, no dialog boxes pop up.

In case you accidentally deleted any document you have to scan it again.

Incoming mail

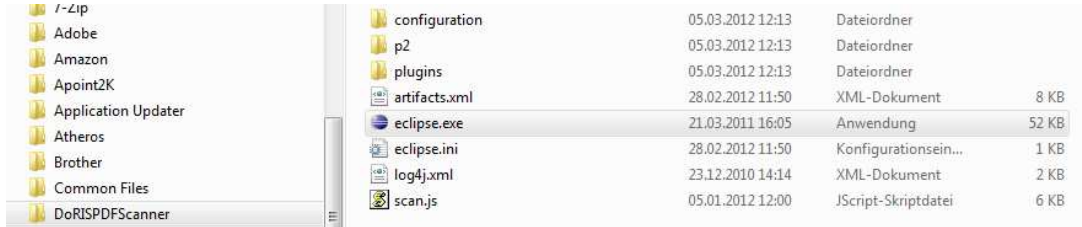
Initially, all incoming paper-based mail is registered in DoRIS®:

1. Start **DoRIS® Webclient** and log in (see DoRIS® Webclient – Getting Started, p.9).
2. Select the file, to which the document should be added to:
by navigation (see Creating new Files With Navigation in the Filing Plan, p.30),
by an according query (see Standard Query, p.80), or
if necessary, by creating a new file (see Creating Files, p.28).
3. Create a new document (see Registering a New Document, p.52).
4. In tab "Order", mark the checkbox **Paper document** in the lower section (see Tab Order, p. 41).
5. Now, the barcode-button  is activated. Generate a barcode  and a barcode label is printed.
6. Save and close the document.
7. Paste the barcode label at the edge of the first page of the document.
8. Repeat step 2 to 7 for all documents.
9. Send the document for scanning.

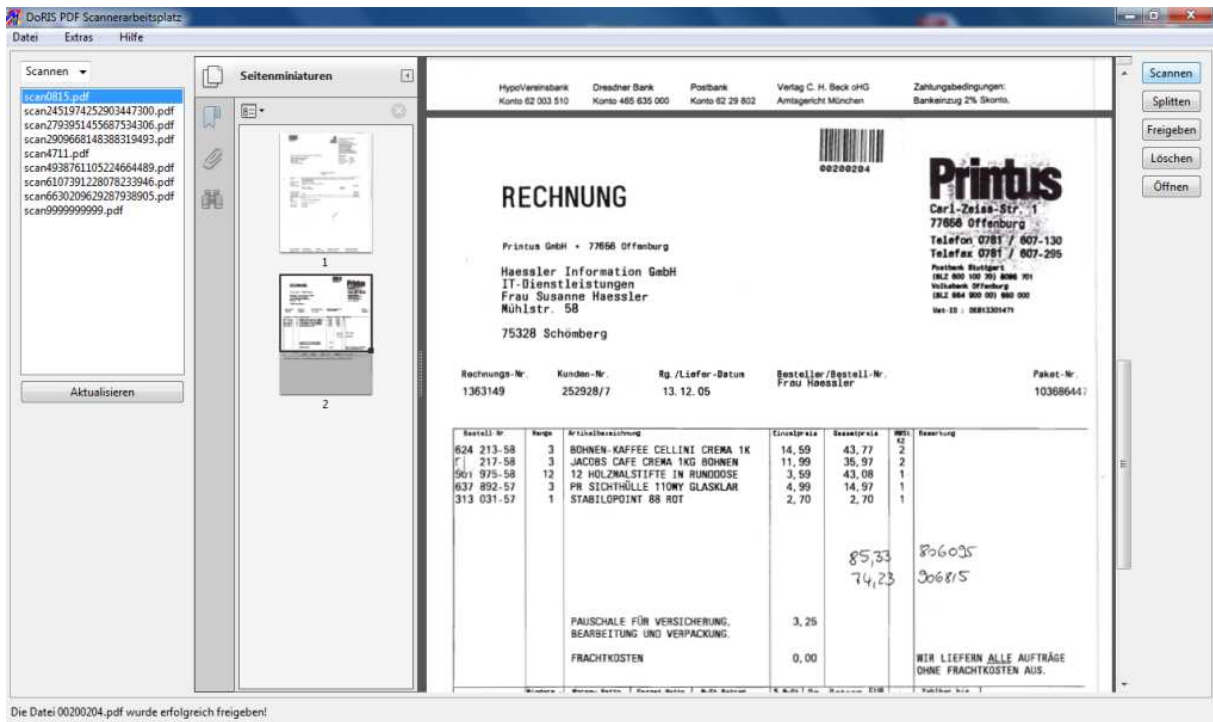
Batch Scanning in the Registry

At the DoRIS PDF Scanner-Workplace, the documents are scanned and added to DoRIS® FileArchive. Now, the documents are clearly assigned to the DoRIS documents and are released for further use:

1. Start DoRIS PDF Scanner-Workplace.



2. Start scanning



- Fill in the data for customized scans in the appropriate fields. Make sure the resolution-value (Auflösung) is above 300 dpi. Furthermore, please check „PDF/A-1b-kompatibel machen“. Start scanning of the documents and save your results.

Benutzerdefiniertes Scannen

Eingabe

Scanner: e-STUDIO TWAIN-Treiber

Seiten: Vorderseiten

Farbmodus: Automatische Erkennung

Auflösung: 400 dpi

Papierformat: A4

Breite: 210 mm Höhe: 297 mm

Zum Scannen weiterer Seiten auffordern

Ausgabe

Neues PDF-Dokument

Mehrere Dateien

An existierende(s) Datei oder Portfolio anhängen

Auswählen:

Dokumenteinstellungen

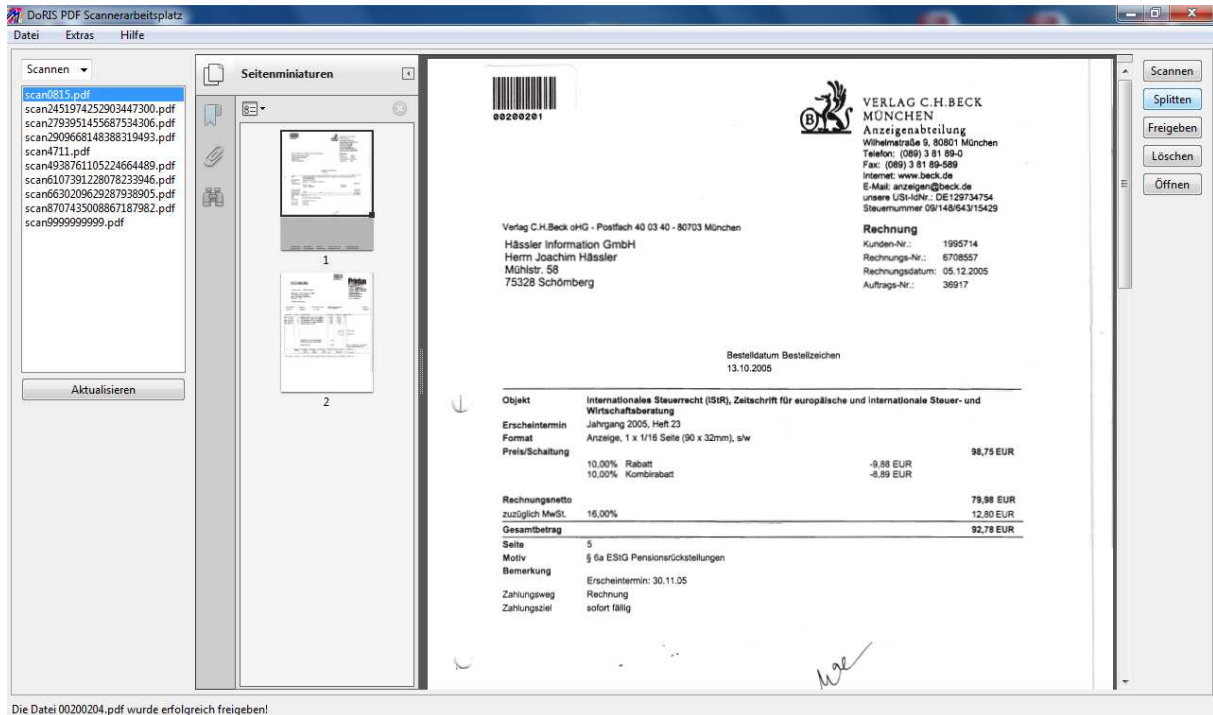
Gescannte PDF-Datei optimieren

Kleine Größe Hohe Qualität

Durchsuchbar machen (OCR ausführen)

PDF/A-1b-kompatibel machen Metadaten hinzufügen

- For separating the documents, choose the file – which was just created by scanning - from the left list and split it **Spalten**.
(If the file is not yet shown on the left list, actualize it first **Aktualisieren**.)



Die Datei 00200204.pdf wurde erfolgreich freigeben!

note

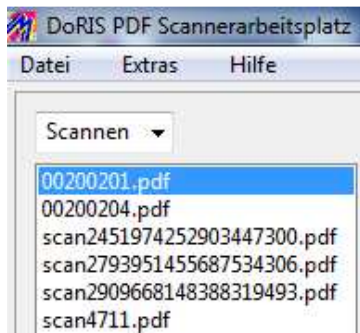
The splitting of the file, which was created by scanning, may last unusually long. The processing-state is shown at the bottom of the window.

Start des Barcode OCR's

Es wurde auf Seite 1 Barcode 00200201 gefunden

Spalten der Datei scan0815.pdf erfolgreich

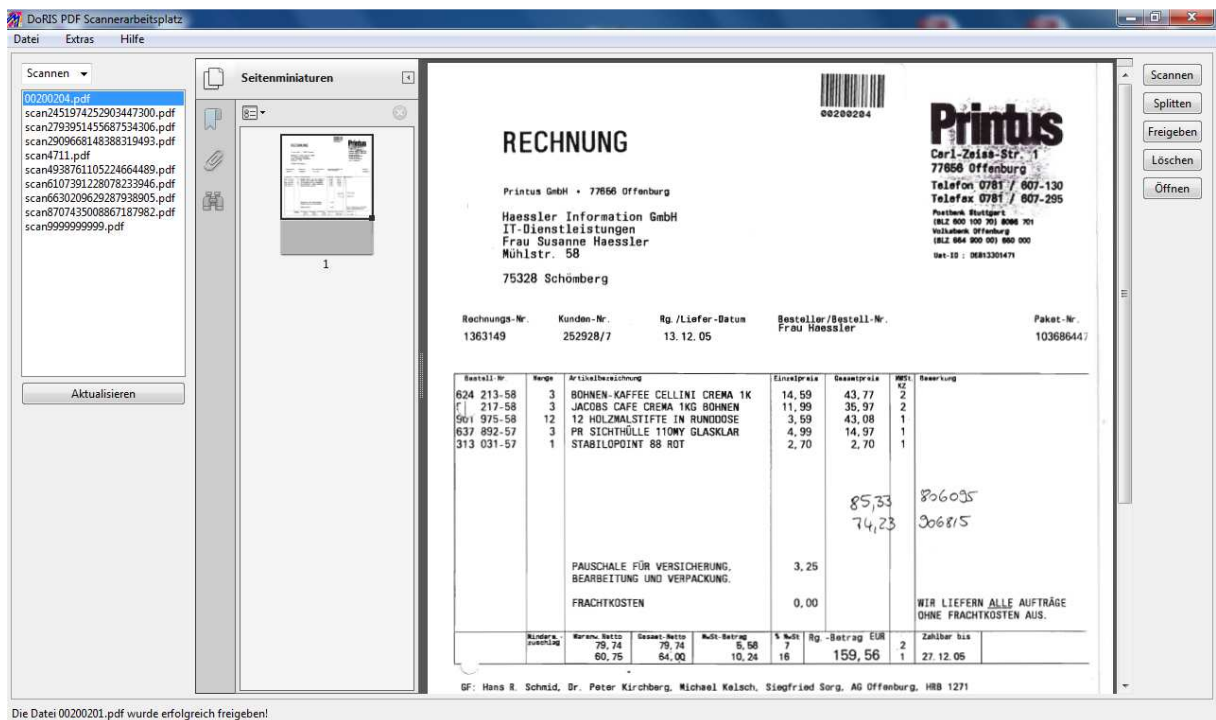
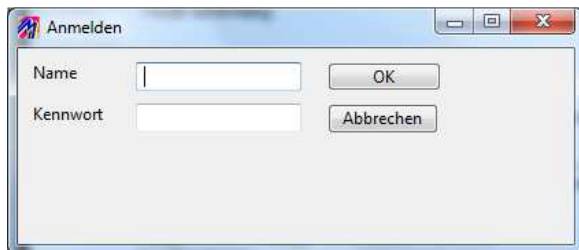
Data-files of single documents are generated with the label <Barcode> .pdf , whereby <Barcode> is an eight digit number.



- The single documents are now available and can be assigned to the DoRIS documents. Thereby each document will be removed from DoRIS PDF Scanner-Workplace:

Select every single file <Barcode>.pdf and release it **Freigeben**.

For the first release it might be necessary to log in the system.



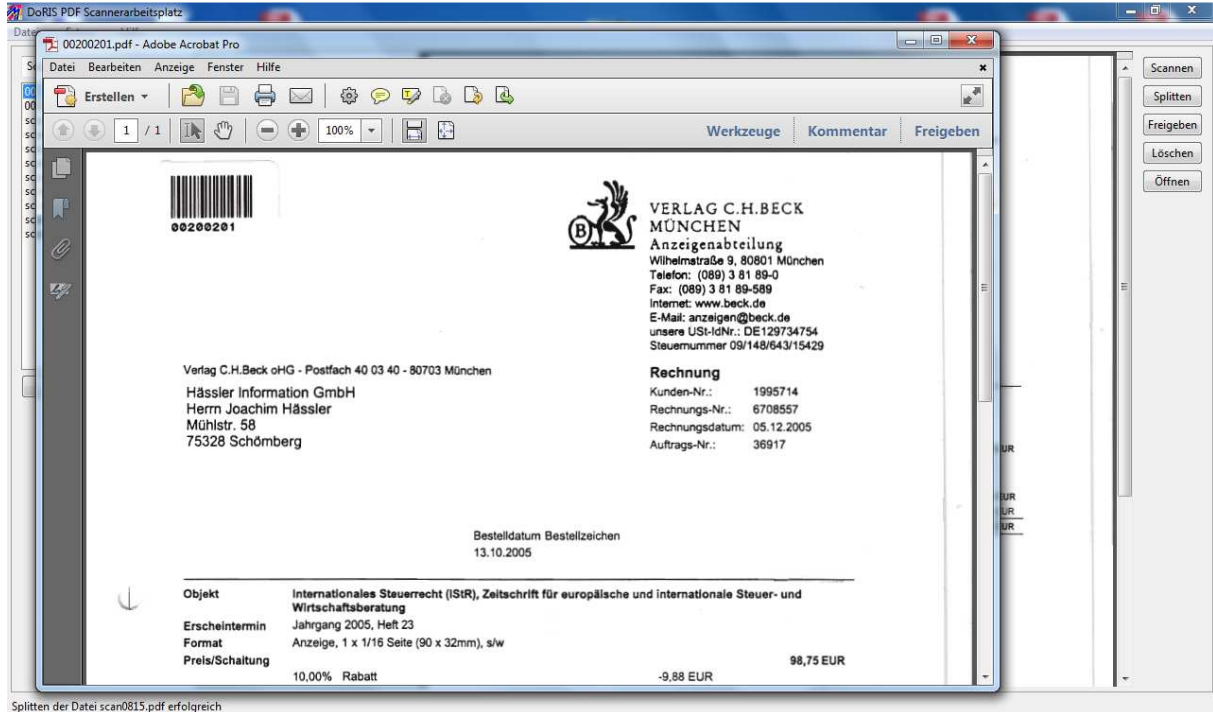
Die Datei 00200201.pdf wurde erfolgreich freigegeben!

All incoming paper-based mail is scanned and now available as attachments of DoRIS documents. Herewith, the processing at the DoRIS PDF Scanner-Workplace is completed.

Further options of processing at DoRIS PDF Scanner-Workplace

Opening Documents

If you just want to view any document, just open it .



Deleting Documents

If there are documents in the DoRIS PDF Scanner-Workplace which are no longer used, just remove them . Thereby, the documents are removed from DoRIS PDF Scanner-workplace as well as from the directory, they were initially saved in.

VALUABLE SUPPLEMENTS


Managing Views of Folders

In the list view, there are different views of a folder possible:

You can define your individual view to meet your specific needs. Hence, important information is provided at a glance. However, you could also select from pre-defined views.

Adding and Deleting Views

Define your individual (user specific) list views:

1. In the list view (right side of the main screen) open its configuration screen to “define views” .
2. In the upper section “Views” you have the option to add or remove views.

Adding views

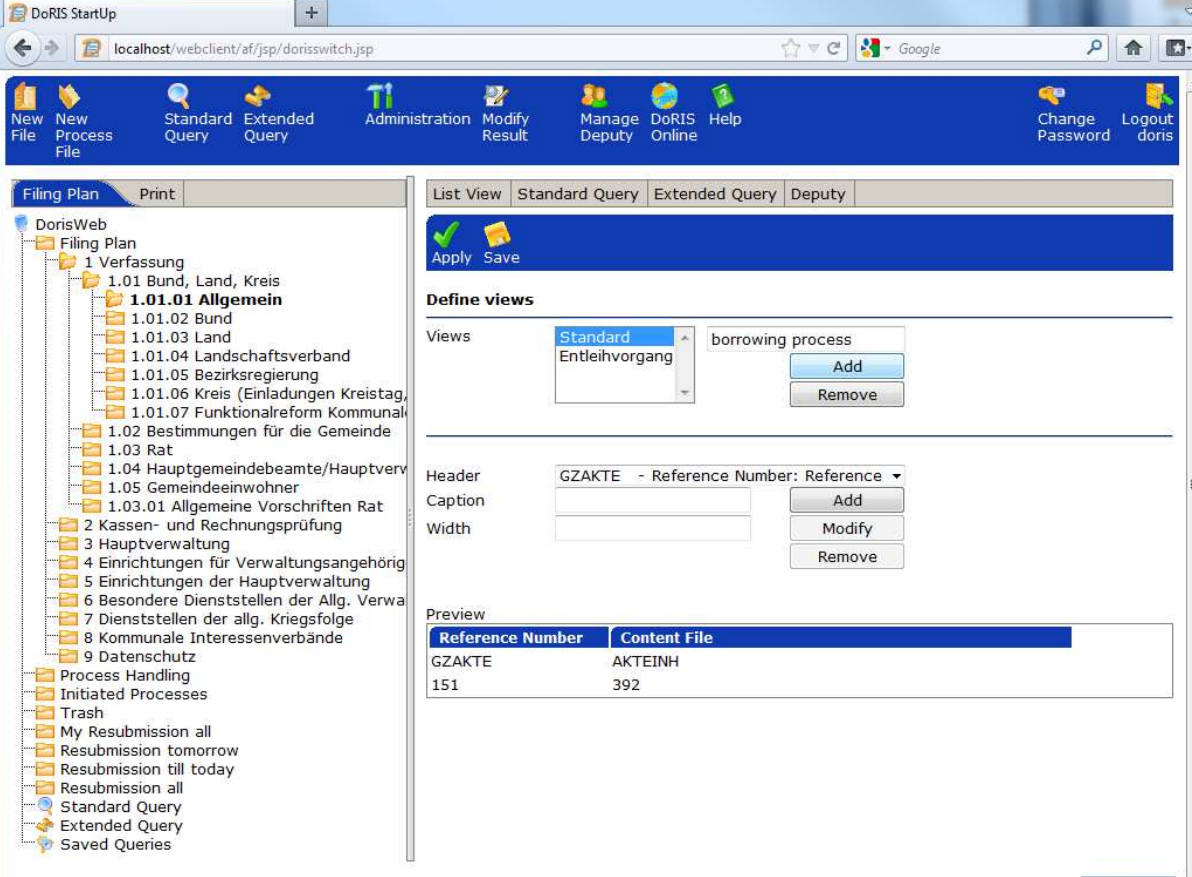
Type in the name of the new (to be configured) view and add it to the list of available views

. The view is created as a blank form.

Deleting views

In the list of available views, select the ‘to-be-removed-view’ and delete it .

3. Save  your changes.




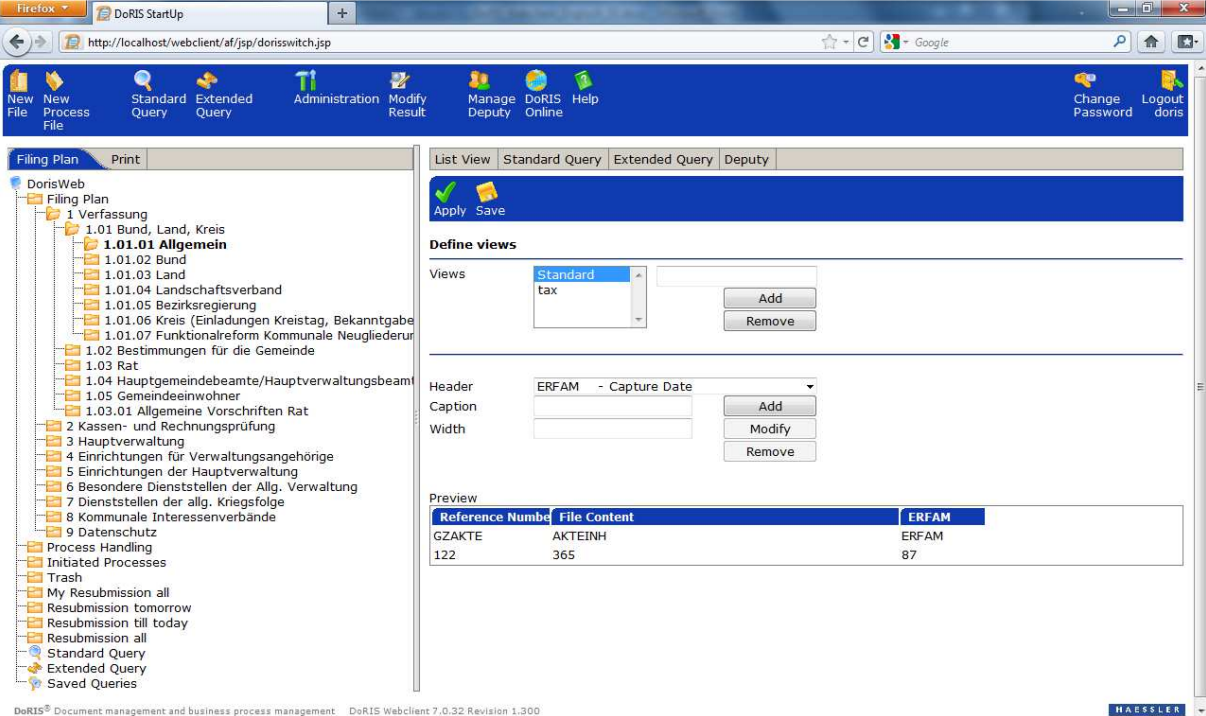
Reference Number	Content File
GZAKTE	AKTEINH
151	392

Adding views

Defining Views

You have the option to add or remove classes to your view. Thereby you create an individual header of a table with the wanted information to an object of a folder of the database.

1. In the list view (right side of the main screen) open the configuration screen to “define views” .
2. From the upper list, select any existing view to modify or a newly created view to define.
3. In the bottom section you define the columns: select the content of a column (Header) from the pull down menu, type in column heading (Caption), determine the Width of the column and add it to the table. The modifications are shown in the preview.

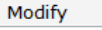


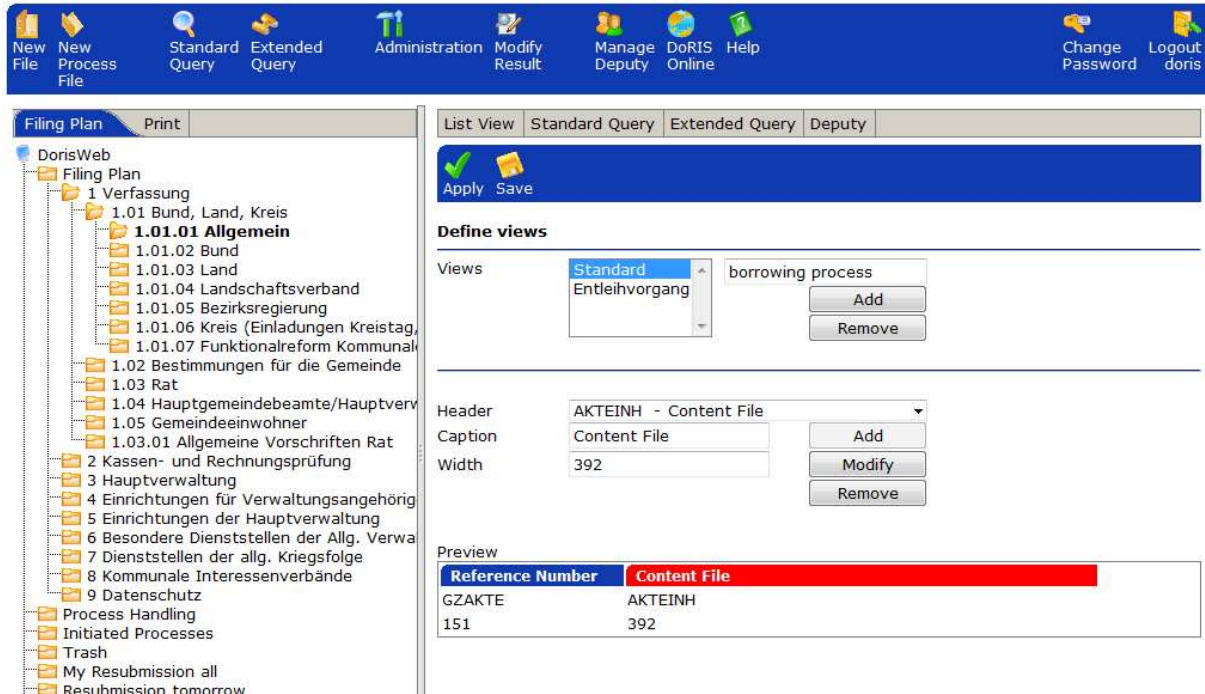
The screenshot shows the DoRIS Webclient interface. The left sidebar contains a navigation tree under 'DorisWeb' with folders like 'Filing Plan', '1 Verfassung', '1.01 Bund, Land, Kreis', and '1.01.01 Allgemein'. The main area is titled 'Define views' and has tabs for 'List View', 'Standard Query', 'Extended Query', and 'Deputy'. The 'List View' tab is active. It features a 'Views' section with a dropdown menu showing 'Standard' and 'tax', and 'Add' and 'Remove' buttons. Below this is a 'Header' section with a dropdown menu showing 'ERFAM - Capture Date', and 'Caption' and 'Width' input fields, with 'Add', 'Modify', and 'Remove' buttons. At the bottom, a 'Preview' table is displayed:

Reference Number	File Content	ERFAM
GZAKTE	AKTEINH	ERFAM
122	365	87

At the bottom of the window, the text reads: 'DoRIS® Document management and business process management: DoRIS Webclient 7.0.32 Revision 1.300' and the 'HAESSLER' logo is visible in the bottom right corner.

Configuration screen of list views

4. If you want to modify an existing column, mark it in the preview. The selected column is red-coloured and its values are shown in the appropriate fields.
5. Make your changes and apply  them.



Define views

Views: Standard, Entleihvorgang

Header: AKTEINH - Content File

Caption: Content File


Width: 392

Reference Number	Content File
GZAKTE	AKTEINH
151	392

6. Save  your entries.
7. If applies, you can directly activate  the changed or new defined view.


note Before a modified or new defined view is effective you have to activate the appropriate view.








Activating Views

1. In the list view right click on the head of table or beneath the table and select your view.
2. The activated view is marked  and the list of results is shown according to this selected view.


List View Standard Query Extended Query Deputy

Search Results **1 - 6**

16 

Reference Number	File Content	Select view :
 1.01.01-12-1	Projektplanung und Durchführung	 Standard
 1.01.01-5	Neustrukturierung Ausbau Mummelsee	
 1.01.01-21-1	Ausstellung Österreich	
 1.01.01-12	Genehmigte Bestellungen für Verwaltung	
 1.01.01-1	Akte Rechnungswesen. Rechnungsverwaltung+Kontrolle	
 1.01.01-123	Bestellungen für Verwaltung : Gesamtübersicht	

Search Results **1 - 6**

16 

Activate views

Editing the List of Deputies

You want to take a few days off, go on vacation, or are -hopefully not- sick... - so do not forget to install a deputy!

The access to DoRIS records is controlled by access rights. Thus, in case of absence, e.g. vacation or sickness, it is important to determine a deputy. For a designated period of time, the deputy has your access rights.



Please Note!

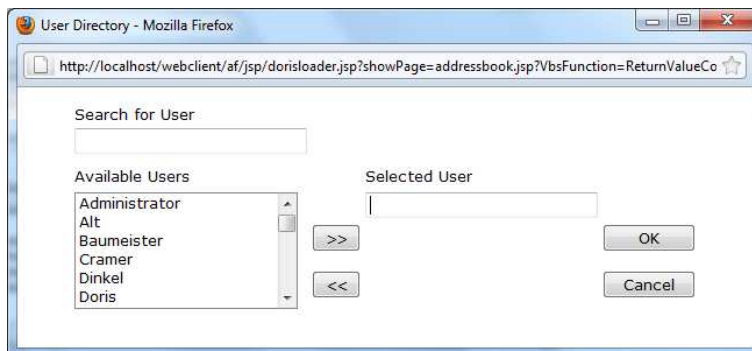
In case you are not an administrator, you can only follow up and edit your own deputies.

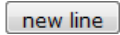

note

Sudden sickness or other cases may occur when you are not able to maintain your deputy-list properly. Therefore, maintaining of deputies should be the responsibility of the administrator. Depending on the prevailing needs, the administrator should have at least one permanent deputy by himself.

How to install deputies:

1. Choose tab "Deputy" in the right side of the main screen or "Manage Deputy"  in the toolbar.
2. Enter your name (or user-ID) in the field `User` first, the name (or user-ID) of your deputy in the field `Deputy` next.
Alternatively, you can search for your deputies' name in the user directory .



3. Enter the time-period of substitution in the fields `From` and `To`. In case of constant substitution just check the box `Permanent`.
4. If needed, you may add more deputies .
5. Save your data .




The screenshot shows the DoRIS Webclient interface. On the left is a tree view under 'DorisWeb' with a 'Filing Plan' section expanded. The main content area is titled 'Deputy arrangement' and contains a table with the following data:

No.	User	Deputy	From	To	Permanent
432	doris	cramer	01.05.2011	31.05.2011	<input checked="" type="checkbox"/>

Buttons for 'Save' and 'new line' are visible.

Install deputies

Do you need to withdraw an ongoing deputy?

1. Choose tab "Deputy" or "Manage Deputy"  in the toolbar.
2. Find the appropriate deputy and delete the data in the fields From and To or delete the whole line . In case of constant deputy, just un-check the box Permanent.
3. Save your data .

Empty Trash

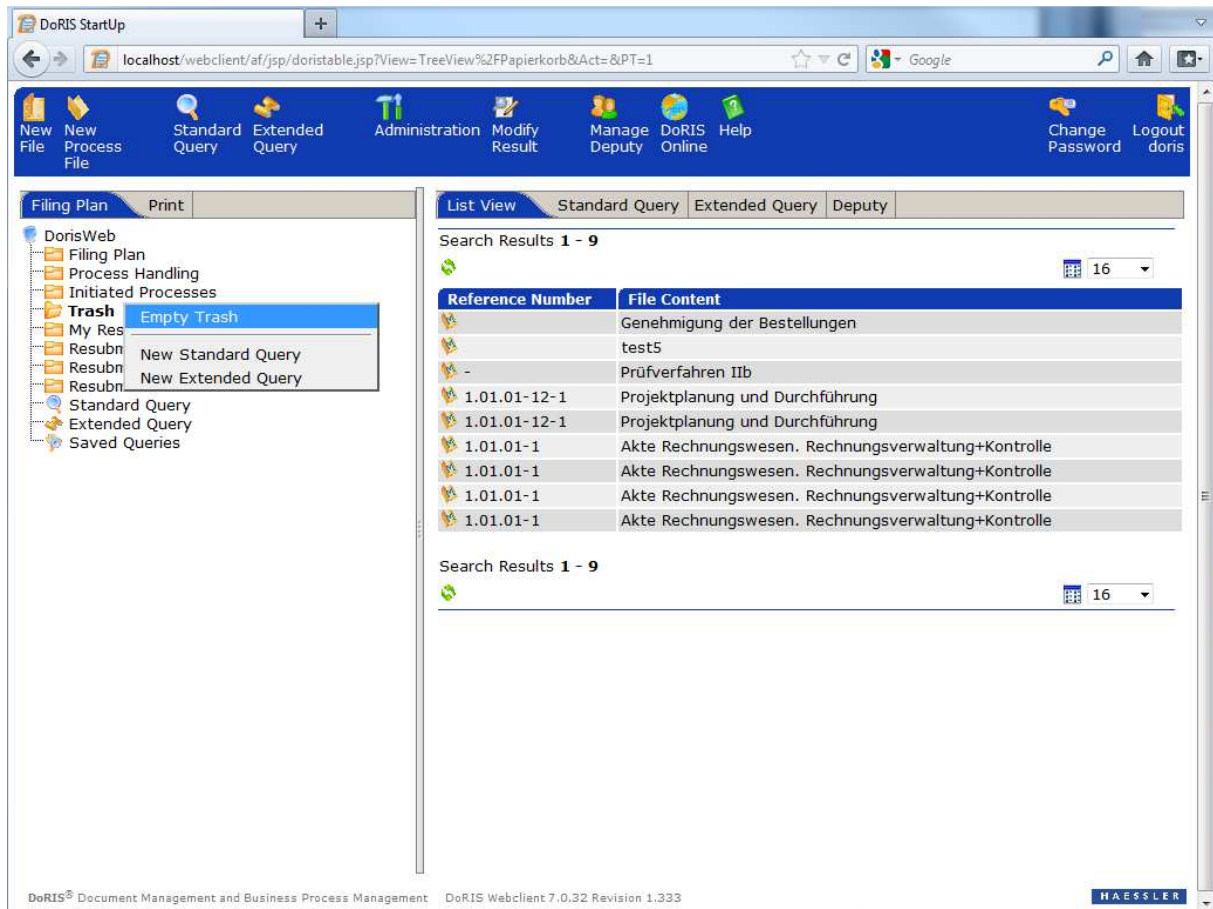
If records are removed from trash, they are permanently deleted.

Please Note!

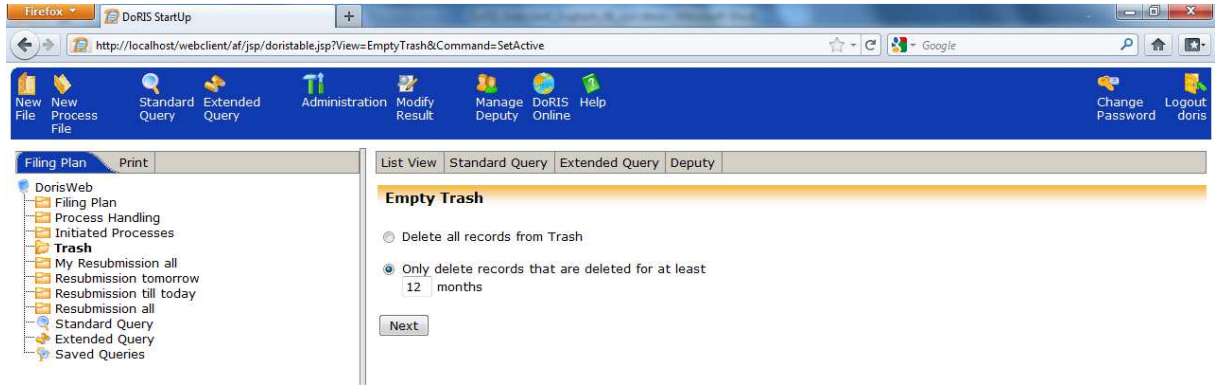
Deleting records from trash is controlled by access rights.

This is how you empty trash:

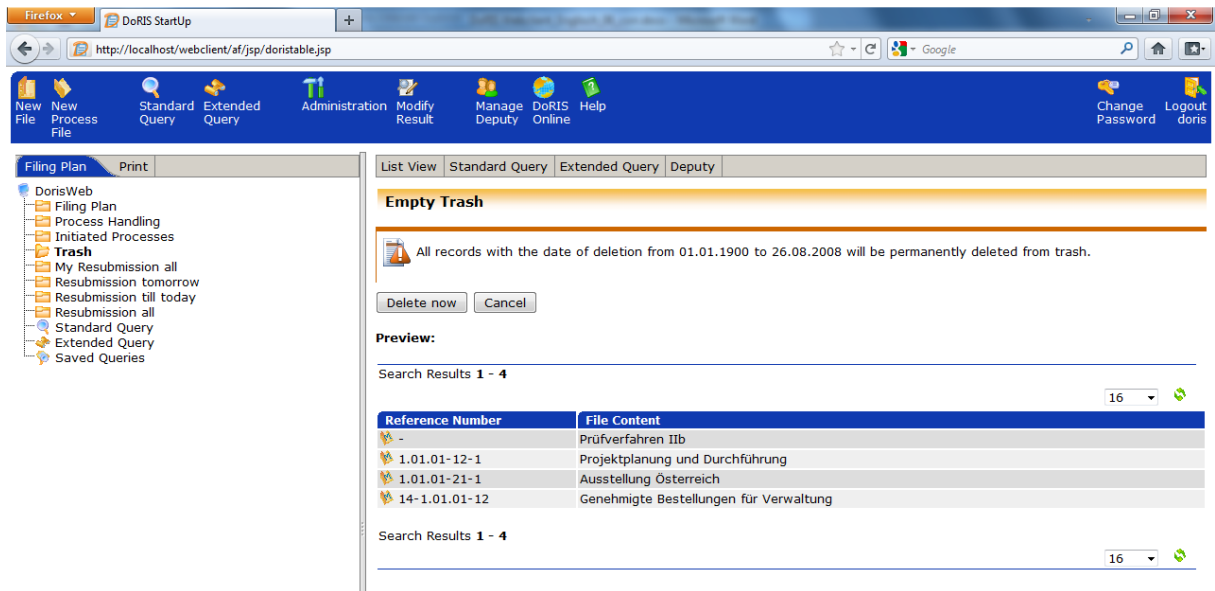
1. Mark **Trash** in the tree view of the database.
2. With right click you choose **Empty Trash**.



3. Now you have the option to delete all records or set a time limit for the date of deletion.



4. Afterwards you have to confirm the permanent deletion or you can still cancel the deletion.



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