Document management system "DocumentLite"

Manual of the system administrator

Contents

1. Introduction

This Manual of administrator describes the installation and configuration of the system "DocumentLite" and is intended for administrators who provide care and support efficiency electronic document management system.

1.1.The document management system "DocumentLite"

The system "DocumentLite" is developed by organization with limited liability "Agamaks - Information Technologies" and designed to automate the process of document processing to the organization. The system is a multi-user, provides a coordinated joint work group of staff. It depends on the installation of the system and its setting: the authentication of the system user, administration of access rights for the workable information, the supplying of integrity and safety of information. The system has a client-server interface and is on-stream in the local network. This device allows the system to ensure the following key features:

- The organization of the optional, easy changeable quantity of workplaces that is defined by work volume, the kind of tasks that are solved, and the quantity of the needed staff;
- The effective protection of the integrity of information in multi-mode access;
- Ensuring the confidentiality of information on control of access rights to it.

1.2. Server of the workflow management

For the working in the system "DocumentLite" you have to have personal computer with Windows operating system or Linux system with software:

1. Apache (version not later than 1.3.33) or IIS
2. PHP (version 4.x or 5.x, but not below 4.4)
3. MySQL (4.x or 5.x but not bellow 4.1)

To speed up the system "DocumentLite" you can install Apache and PHP on one server and MySQL on the other.

1.3. Administrators of the system "DocumentLite"

The system that many users work with must have central management. This function performs a special dedicated employee or employees engaged in a single, coherent policy configuration and management system, known as system administrators.
The duties of administrator of the system include the following:

- reflection in the current structure of the organization and registration of users;
- creation of document types and attributes of documents;
- appointment of user rights;
- creation of user groups;
- creation of the lists of messages.

In addition, the system administrator provides the starting and installation of the workflow system server, configuration and maintenance, backup, database and disaster recovery system in case of failures.

1.4. Installation and setting of "DocumentLite"

1. Unpack the archive of installation package.

2. Copy the files from the www in the home folder of your WEB server.

3. Create a MySql database and user for it with full rights.

4. Run the script script.sql in the created database.

5. Substitute in the folder user_params.php for yours:
$db_server = "server MySql"; - usually localhost;
$db_login = "the user login db";
$db_pas = "the password of user db";
$db_name = "the name db";
$file_root_path = './files/';- the way to the folder, where files of documents will be kept, it is necessary to create this folder out of sight of WEB server. The way can begin with the folder index.php and end with slash;
$file_lang = 'ru.php'; - localization file (stored in the folder lang);
$dateformat = 1; - the date format for display to users (1 = dd-mm-yyyy, 2 = mm / dd / yyyy, 3 = yyyy-mm-dd);
$default_url = 'http://demo.upravdoc.ru'; - the address of the system "DocumentLite"';
$default_email_sender = 'admin@upravdoc.ru';- e-mail, from an address which will be sent out news and notifications;
$noticeeventsday = '(3,1,0,-1)'; - in brackets indicate how many days to warn about the event by e-mail (3 - for 3 days, 0 - in the day, -1 - a day).

6. Restart the WEB server.

7. Setting is finished. To check "DocumentLite" you have to enter login root and password 1.

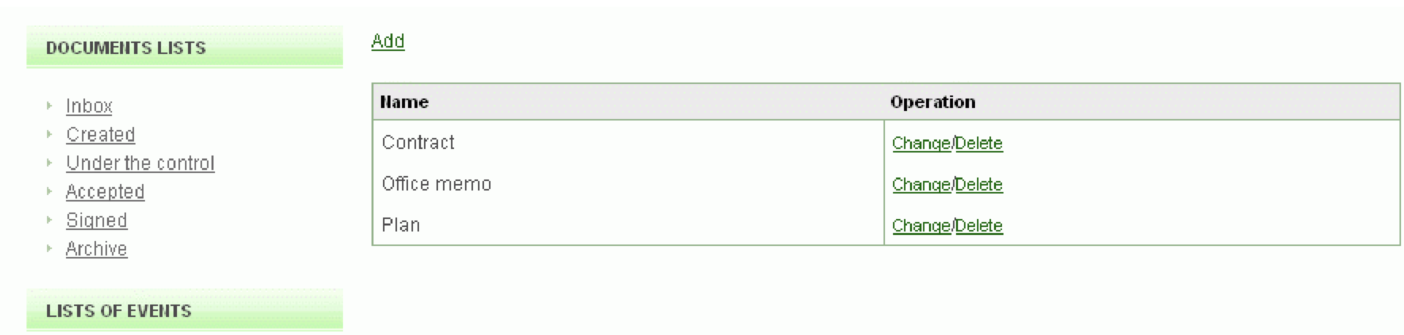
2. Menu "Handbooks"

Only administrators of the system "DocumentLite" have an access in this menu. If in the properties of the user specified the role of "Administrator", it acquires an additional menu "Handbooks" that members "User" can't enter.

Let's consider each menu item separately.

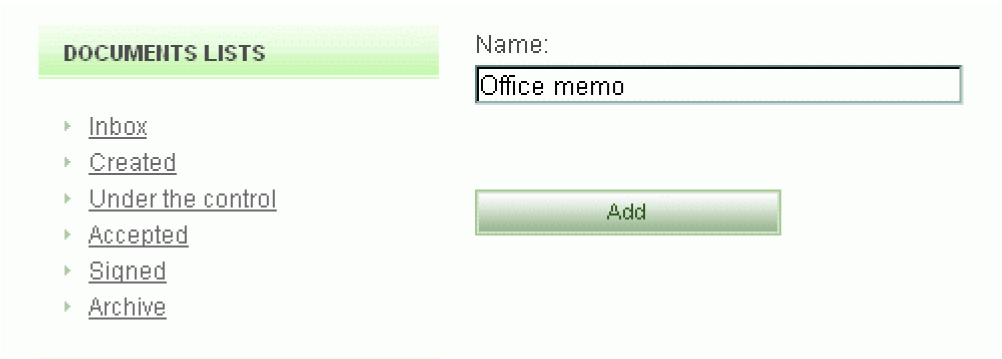
2.1. Types of documents

This option exists to add the document types.

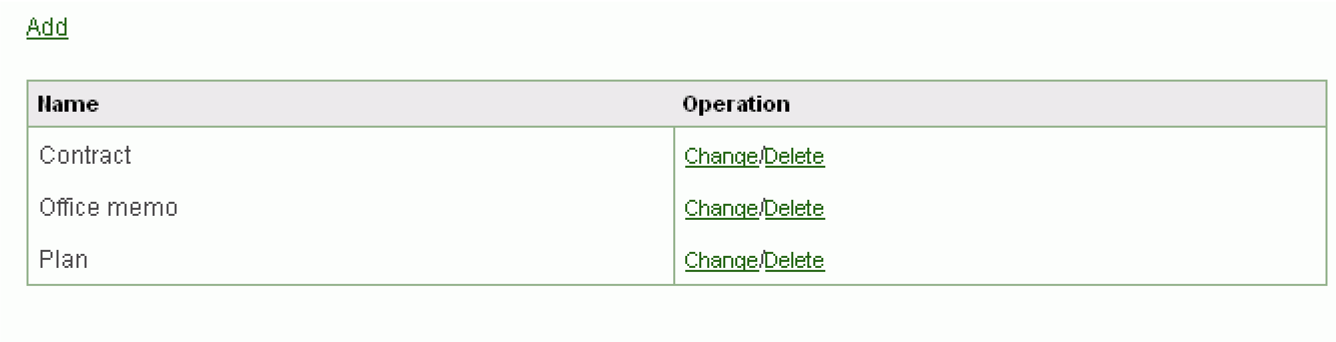


To add a new document type it is necessary click "Add".

In the form that appears, you have to type the name of the document and click "Add":



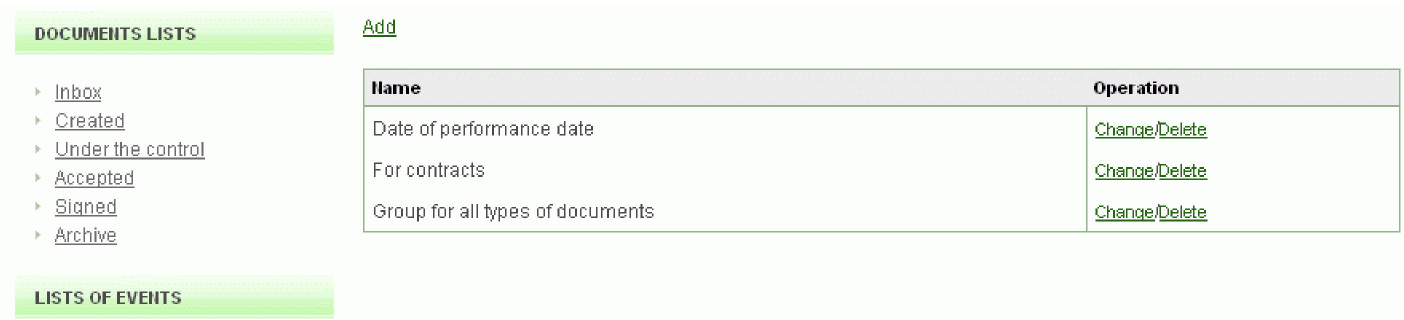
The document is added. If necessary, you can change or delete it by clicking on "Change / Delete" in the list of documents:



2.2. Groups of document attributes

In the system `DocumentLite` every document has the following data: date of creation, name, type, and files that can be included in a document of its members.
Each type of document in your organization can have different types of information that have to be kept and give the possibility to users to browse it. In the system "DocumentLite" such information is called attributes of the document. To enter the attributes of the document there are references: the attributes of documents, the group attributes of documents and communication group's attributes of documents.

To create a group of document's attributes it is necessary to enter the paragraph "Group of document attributes", then to click "Add".

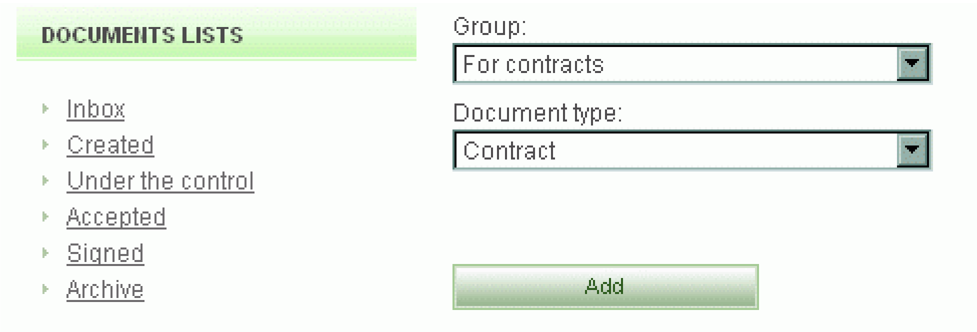


In the form that appears, you have to type the name of group and click "Add":

Thus, you will create the necessary attributes of a group of documents.

2.3. Connections of groups of document attributes

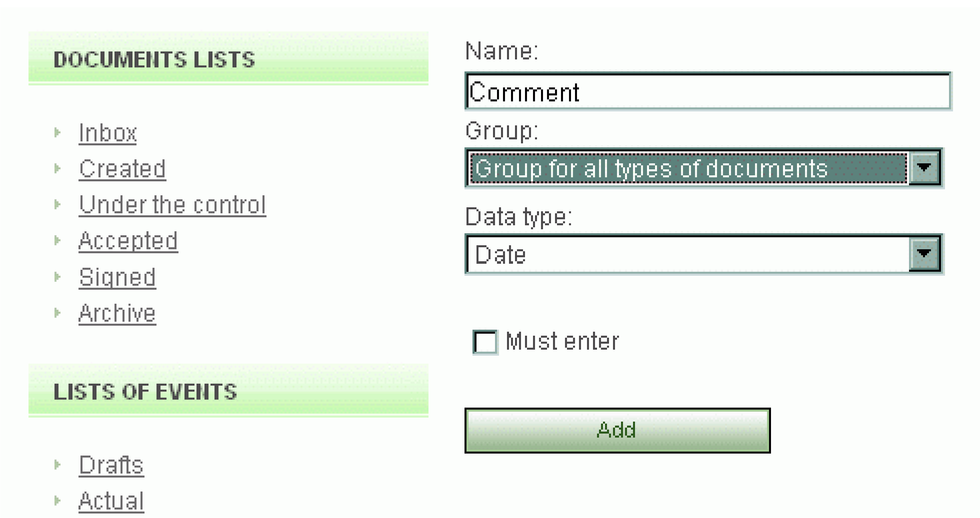
When document types and groups of documents' attributes were typed, you need every type of document to associate with any of the existing groups. To do this you have to enter the item "Connections of groups of document attributes".



Then it is necessary to select the desired document type, group, to which he belongs and press the button "Add". For example, in the picture the type of the document "Contract" is included in the "For contracts".

2.4.Document attributes

For each of the groups of document attributes you have to enter attributes. To do this you have to enter in the menu "Document attributes" and click "Add". In the form that appears you have to type the name of the attribute, select the group, to which he belongs and the types of data:

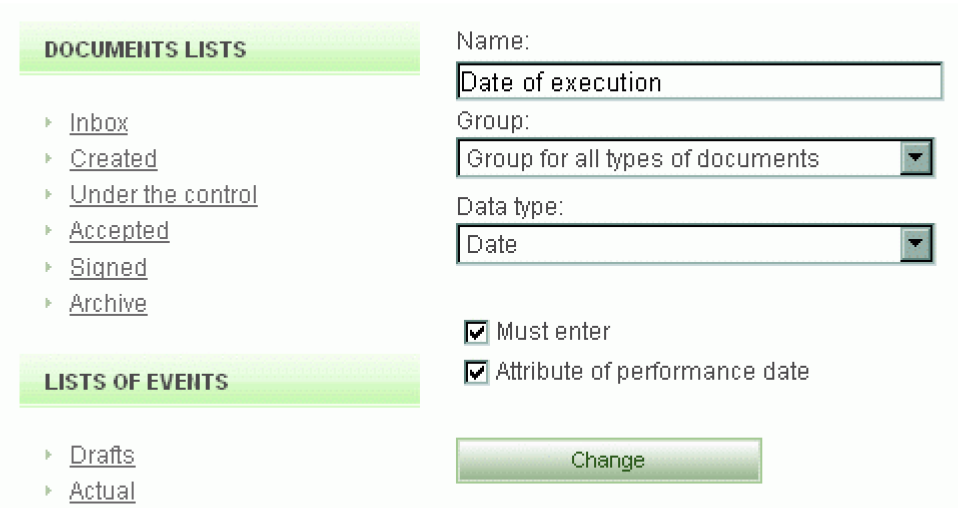


There are the following types of dates:

Date - date;
String area - a text field with the ability to enter multi-line text;
String line - a text field where you can enter a text string.

If the field is required you have to tick off "Must enter".
Attribute "Date of execution" is entered in a special way. First, we enter the attribute "Date of execution" of type Date.

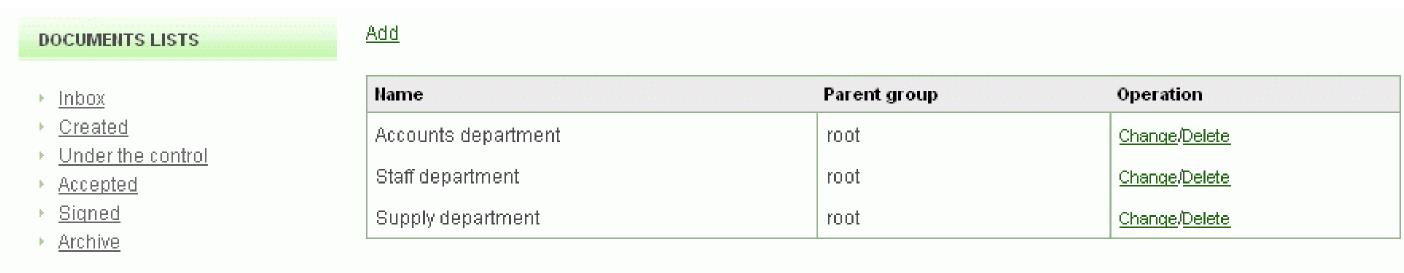
Then for the attribute «Date of execution» you have to click "Change".



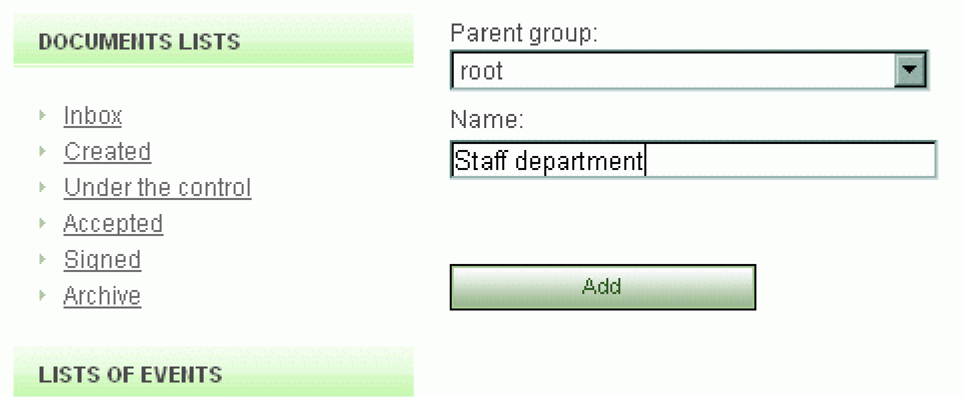
In the form that appears you have to tick off "Attribute of performance date" and click "Change".
Then the column "Date of execution" will appear in the folder "Under the control" and in the folder "Accepted" and you can view a report of delayed documents (section "Overdue documents").

2.5.User groups

Users` groups exist for a more convenient users` choice and their storage. Thus, each user must belong to a particular group. To add users` groups you have to enter in the menu item "User Groups" and click "Add".



In the window that appears you have to select the parent group and type the name of users group:

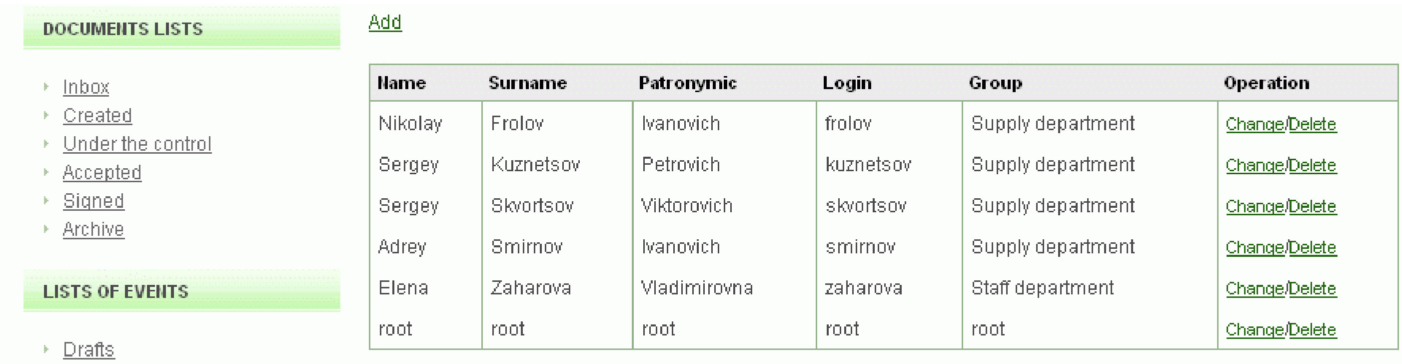


"Parent group" is necessary for the organization of tree-type system of group.

Group root is the parent group of upper level.

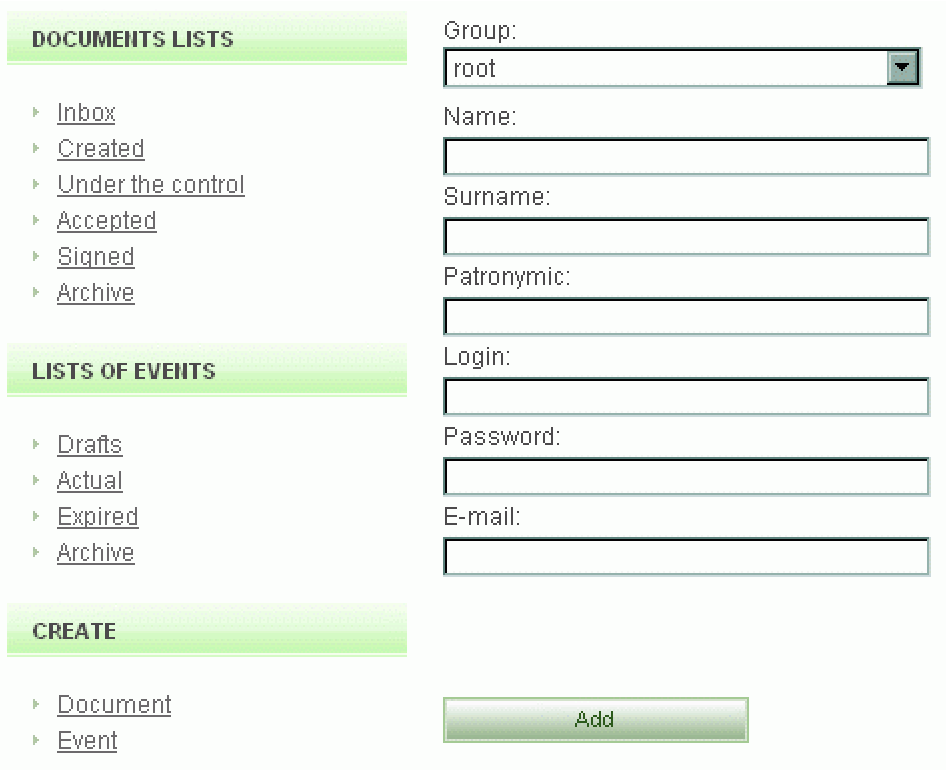
2.6. Users

To add a user you have to enter the menu "Users" and click "Add".

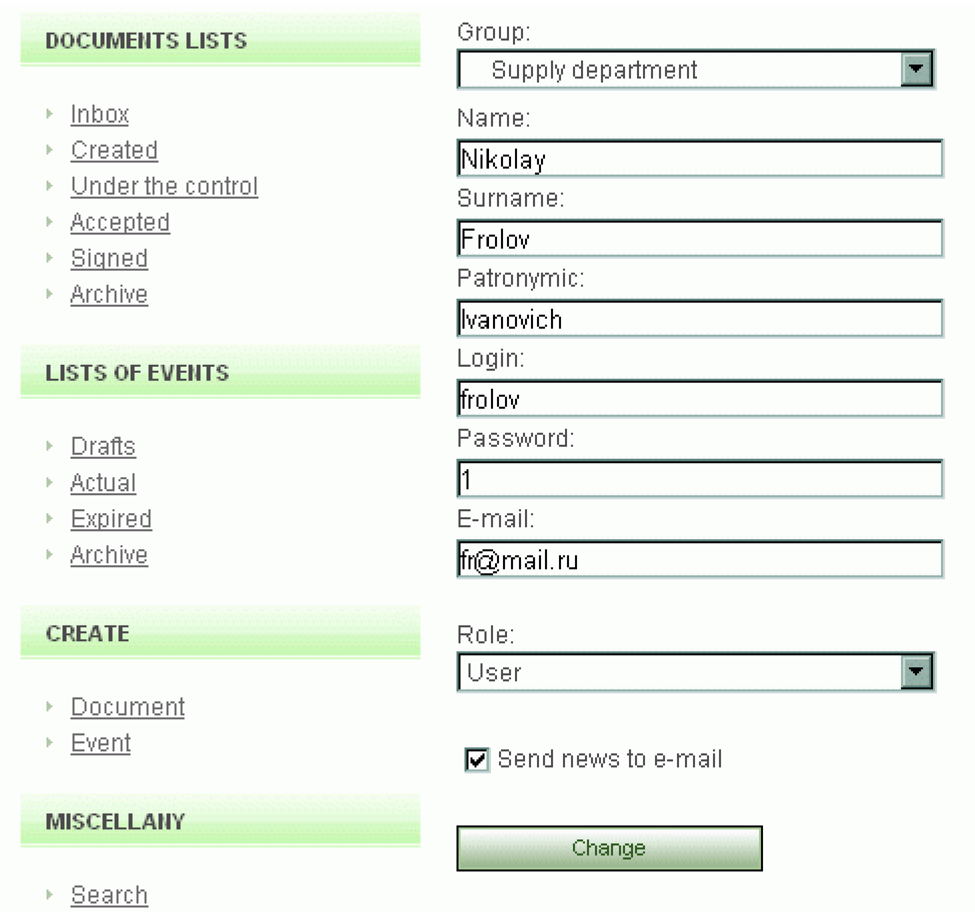


Name	Surname	Patronymic	Login	Group	Operation
Nikolay	Frolov	Ivanovich	frolov	Supply department	Change/Delete
Sergey	Kuznetsov	Petrovich	kuznetsov	Supply department	Change/Delete
Sergey	Skvortsov	Viktorovich	skvortsov	Supply department	Change/Delete
Adrey	Smirnov	Ivanovich	smirnov	Supply department	Change/Delete
Elena	Zaharova	Vladimirovna	zaharova	Staff department	Change/Delete
root	root	root	root	root	Change/Delete

In the form that appears you have to select a group, type surname, name and patronymic of the user, as well as the login and password to enter the system "DocumentLite", enter your email address to which notifications will be sent and click "Add":



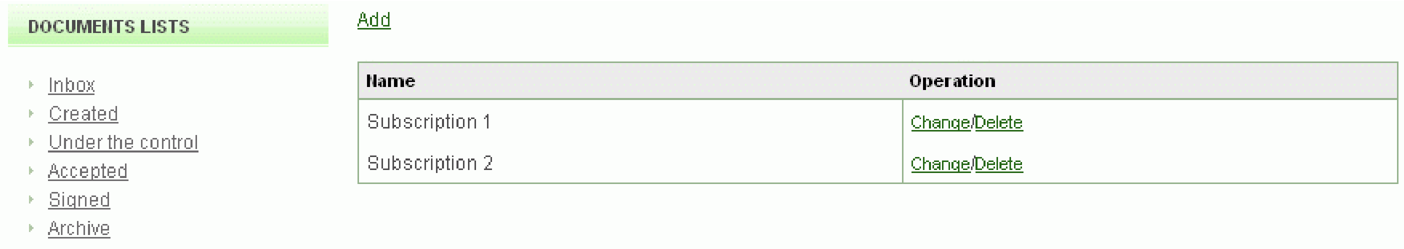
Then you have to click reference "Change" for the entered user:



In the following form you have to choose role: the user or administrator (by default is "User"). In contrast to the user, administrator can edit Reference manual. For news receiving (about new documents, adding to the discussion, etc.) you have to tick off "Send news to e-mail".

2.7. Distributions

If the controller often sends documents to the same users, you can create groups of users – distributions. To do this you have to enter the menu item "Distributions" and click "Add".



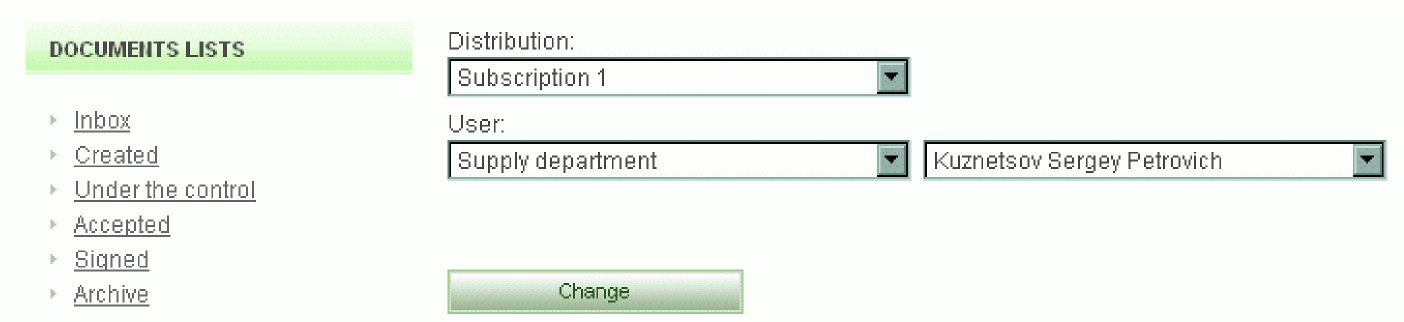
In the following menu you have to enter the name of distributions and click "Add".

2.8. Users of distribution

This menu is designed to add users to the created distributions. When you click on the item the following window will appear:

To add a user to the distributions you have to click "Add".

In the form that appears you have to select the name of distributions and the given user. Then you can click "Add".

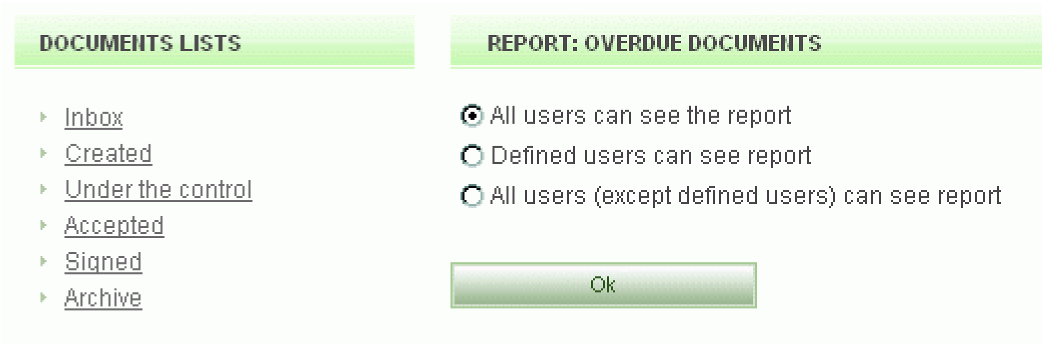


So you can add any number of users in a subscription..

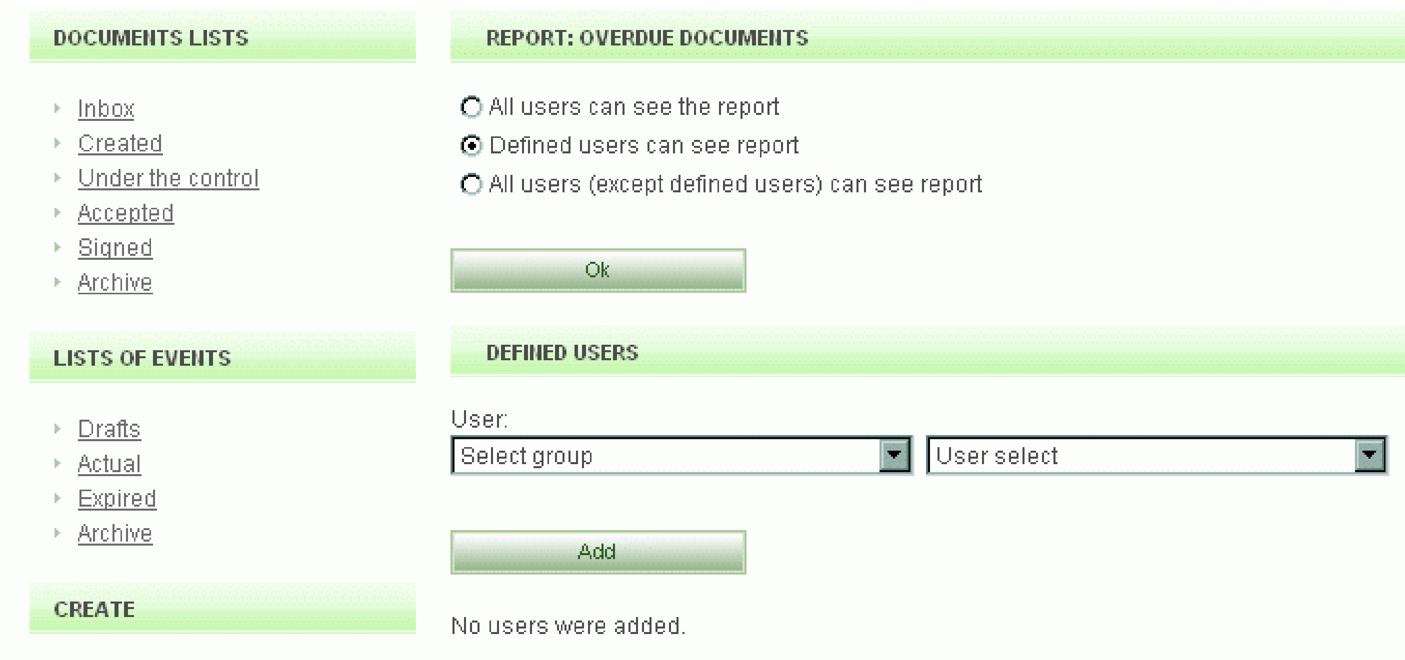
2.9. Rights for reports

This menu is for adding user's rights to view reports. When you click on the item the following window will appear:

For concession of rights you have to click reference "Change rights":



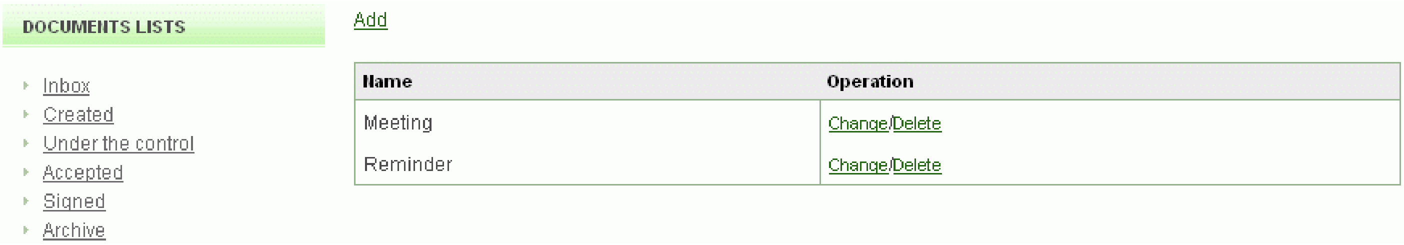
If the report should be seen only by certain users you need to put a point near the field "Defined users can see report" and click the button "Ok".



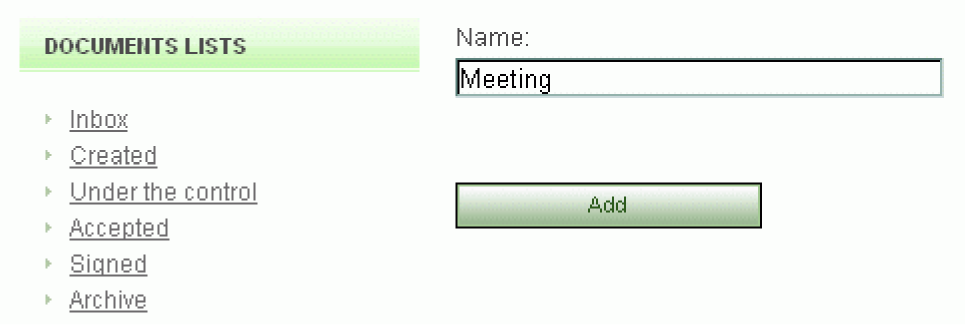
In the window that appears you have to select the user and click the "Add". Next user is added by analogy.

2.10. Types of events

This menu is designed to add types of events:



For adding a new type of event you have to click "Add".



In the field "Name" you have to type the name of new type of event and click "Add".

The system administrator can set automatic sending of emails to users that there is a certain number of days is left before the event. For doing this, you need to configure the automatic script execution notice.php (several times a day).
In the file user_params.php you have to type, in what days before the event any notifications should be sent.
For example:
$noticeeventsday = '(3,1,0,-1)';
0 - the same day event is.
3 - three days before.
-1 - a day after the event.