FORTRA

Webdocs
Administrator Guide

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Webdocs

Webdocs is document management software. Like a filing cabinet, Webdocs is where you go to quickly find documents, work with them, and then return them for others to use.

But Webdocs is much more than a filing cabinet. With Webdocs you can:

- Access your files from anywhere you have access to the internet.
- Make documents accessible across your organization's network.
- View documents from any web browser. Supported file types include: PDF, TIFF, JPG, PNG, or DOCX.
- Secure documents and manage document access.
- Store documents in their native file format. Webdocs does not convert files to a proprietary file format.
  For example: PDF documents are saved with a PDF file extension. Microsoft Word documents are saved with a DOC or DOCX file extension. And so forth.
- Upload documents from most standard scanners, including TWAIN-compliant products, Kofax-compliant products, multi-function copier devices, and scanner devices.Contact Fortra to learn about RJS Imaging Scan Workstation, which was specifically designed to upload images of paper documents to Webdocs.
- Set up document routes for approval, rejection, or transfer.
- Reduce your paper usage.

This section provides a summary of Webdocs. This section is divided into the following topics:

Planning for a Successful Set-Up

Webdocs Concepts

Logging In to Webdocs

Planning for a Successful Set-Up

In order to take advantage of all the benefits that Webdocs can offer, your organization needs to involve your business users in planning and organizing the Webdocs implementation.

To help you work through these steps,we recommend using the *Webdocs Workbook: A Planning Guide for Both Webdocs iSeries and Webdocs Windows*. If you don't have a copy, contact your [%=corpvariables.corp_short%f] project team or technical support.

Working through the decisions with the business users will help you understand what they need, and also give you a good grounding in Webdocs concepts.

Go through these steps to plan your Webdocs implementation:

1. Set your focus: what department to start with first.
2. Put together a good implementation team.
3. Collect and analyze documents.
4. Determine how Webdocs will organize and find your documents.
5. Determine how Webdocs will work with your functional areas and users.
6. Plan how users and groups will access information.
7. Describe routes: how documents will flow through your organization.

Once your implementation team has completed the Webdocs Workbook and the Webdocs Workbook forms, you will have all the information that you need to set up Document Types, search keys, users, groups, permissions, and routes.

If your organization decides not to have an implementation team, make sure you review the Webdocs Workbook so that you do understand Webdocs concepts. You can use the forms in the Workbook to guide your questions about Document Types, users, and so on.

Installing and Licensing Webdocs

For installation instructions, see the Webdocs Install Guide.

> **NOTE:**
> If you are using routing, you need to install the Webdocs Route Designer either on your Webdocs server or the system you will use to manage routing.

For licensing instructions, see: Webdocs Install Gude.

Learning the Basics

Once you have your completed Webdocs Workbook, use the worksheets as you set up Webdocs for your organization.

For an overview of users, groups, folders, Document Types, and permissions, you can watch the short Webdocs videos available on http://support.rjssoftware.com/product/webdocs-windows#documentation.

Webdocs Concepts

The following terms have special definitions in Webdocs. To learn more, see the *Webdocs Workbook: A Planning Guide for Both Webdocs iSeries and Webdocs Windows*. If you don't have a copy, contact your Fortra project team or technical support.

Document Type - A category that contains different kinds of related documents. For example: AP or HR.

Folder - Where documents are stored for security. Users and groups have permissions to work with specific folders.

> **NOTE:**
> In Webdocs, folders are not the primary way to search for documents. Webdocs uses search keys and Document Types to search for documents instead.

Group - A collection of users. Groups have permissions that define what their users can do with documents.

Route - The path documents take from one user's Webdocs inbox to another user's inbox. Documents move through routes either via user approvals or automatically via exit programs.

Search Keys(also called index keys, indexes, or metadata) - What you use to look up documents. For example: Dates, names, or numbers.

Title - Fortra recommends that you use this as a sub-type within a Document Type. See the Webdocs Workbook for more about title. For example: Invoice, purchase order, or receiving document. You can use titles in other ways in your installation.

User - An account for one person. Users can be put into groups and have permissions at the user and group level that define what they can do with documents.

Logging In to Webdocs

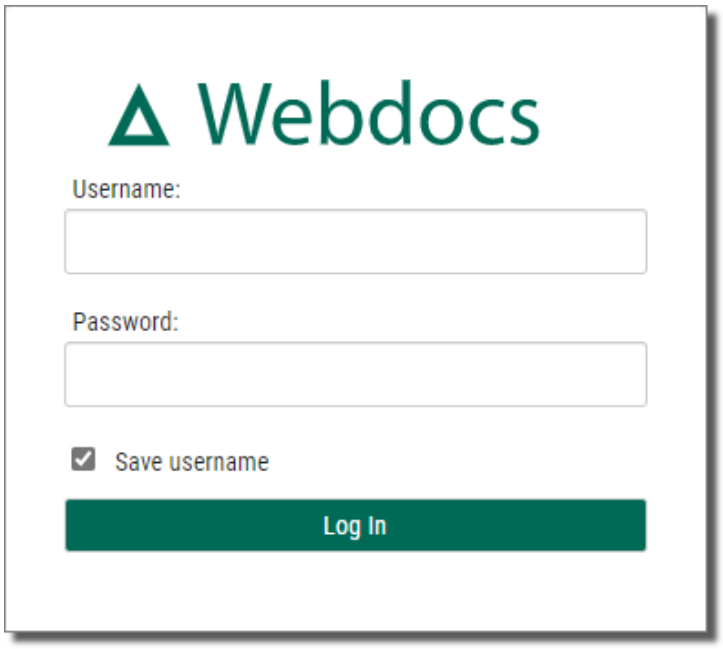
This topic shows you how to log in to Webdocs.

> **NOTE:**
> If you did not get the default administrator user name and password from Fortra technical support when you installed Webdocs, contact Fortra technical support.

To log in to Webdocs:

1. Open a browser and type your Webdocs URL.

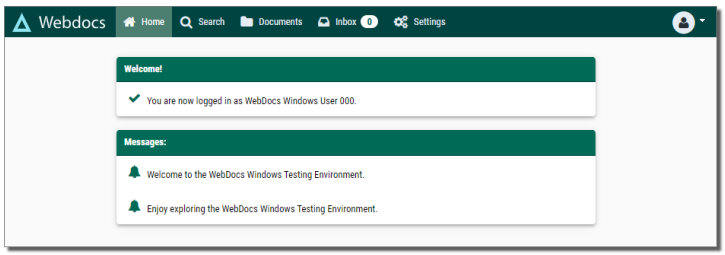
   The log-in page displays.



2. In **Username**, type your Webdocs user name.
3. In **Password**, type your Webdocs password.
4. Click **Login**

.

   The Home tab displays, and you are logged in.



Contacting Fortra

Please contact Fortra for questions or to receive information about Webdocs. You can contact us to receive technical bulletins, updates, program fixes, and other information via electronic mail, Internet, or fax.

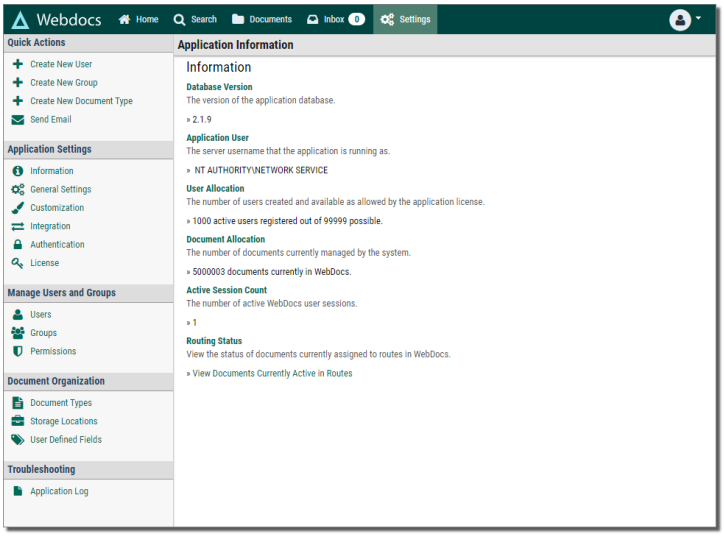
For support issues, please provide the following:

- Check this guide's table of contents and index for information that addresses your concern.
- Gather and organize as much information as possible about the problem including job/error logs, screen shots or anything else to document the issue.

Configuring Webdocs

This section shows you how to configure Webdocs, define where documents are stored, and change the language on the Webdocs user interface.

Most administrative tasks in Webdocs are accessed from the side menu of the Settings tab.



Select an item from the left navigation panel to display that information in the main section of the screen.

> **NOTE:**
> Only Webdocs administrators have access to the Settings tab. Non-administrators do not see the Settings tab when they log in.

This section is divided into the following topics:

[Configuring the General Settings]

[Customizing How Webdocs Displays]

[Configuring Where Documents Are Stored in Webdocs]

[Configuring the Integration Settings]

[Configuring the Authentication Settings]

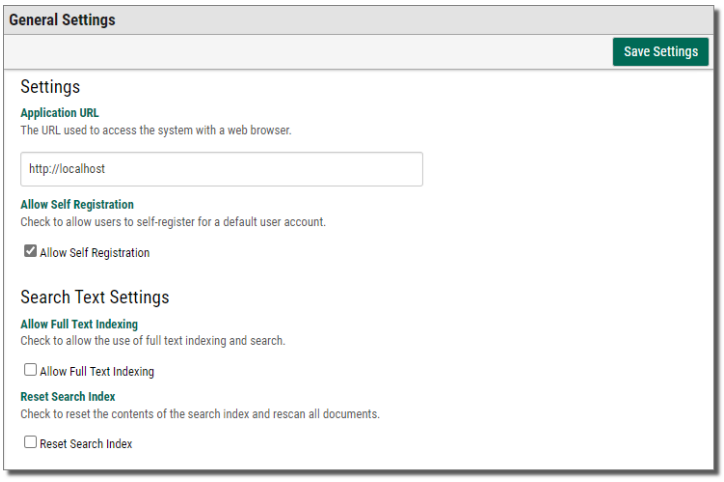
Configuring the General Settings

This topic shows you how to define the general settings.

To define the general settings:

1. On the side menu of the **Settings** tab, click **General Settings**

.
The General Settings display.



2. Configure Webdocs based on the following:

Self-Registration

Users can click the **Register an Account** link on the home page to create their own user account to log in to Webdocs.

EXAMPLE:
This account:

- Is assigned to the default group and has that group's permissions.
- Expires one year after creation.

Allow self-registration if you have many Webdocs users who use Webdocs infrequently and you do not want the administrator to have to create an account for each new user.

a. Check **Allow Self-Registration**.

Additional Login Security

No longer used - Older versions of Webdocs allowed you to encrypt passwords before sending. If you need more security, we recommend that you enable SSL on the Server.

Full-Text Indexing and Search

You can search documents based on words and phrases in the documents themselves, not just the search keys or document titles.

Depending on how many documents are in the system initially, the first full-text indexing may take time. Once the initial indexing is complete, Webdocs can quickly index all new documents. For more information, see Using Full-Text Indexing.

a. Check **Allow Full Text Indexing**. The initial full-text indexing begins immediately.

System-Generated Email

The system can send system-generated emails to administrators and users. For example: System messages or forgotten passwords.

a. In **SMTP Server Address**, type the email server's IP address or host name.

> **NOTE:**
> Your SMTP server may require "relaying" to be enabled. If so, then change the settings in the server to allow relaying.

b. In **Email Sender Address**, type the email address to display in the From line of automatic emails sent from Webdocs.

Webdocs Contacts

All users can see each other as contacts when they send an email in Webdocs,

a. Check **Enable Webdocs users as contacts**.

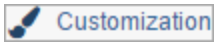
3. Click **Save Settings**

.

A message displays, telling you that the settings have been updated.

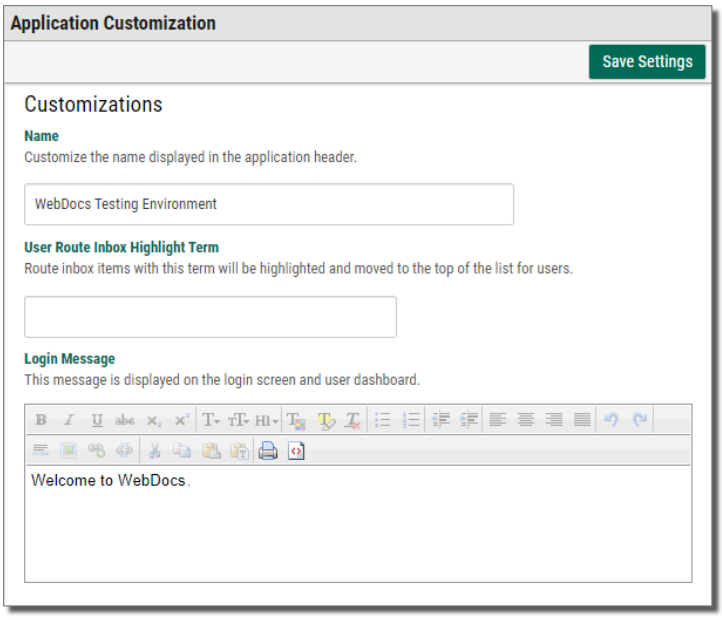
Customizing How Webdocs Displays

This topic shows you how to customize Webdocs to display messages to users.

To customize how Webdocs displays click **Customization** 

on the side menu of the **Settings** tab.

The Customization Settings display.



Use this display to customize the following:

Organization Name

Change the **Name** value to your company's name. This will display in the Webdocs menu bar.

For example: *Acme Foods* is the name in this example:

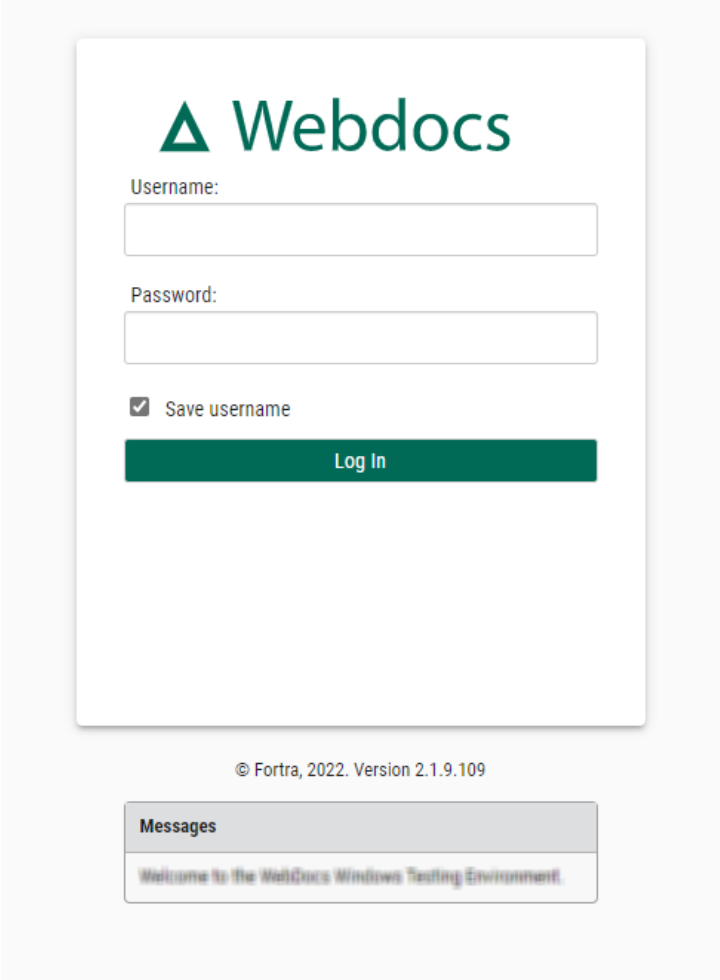
User Route Inbox Highlight Term

Enter a word or phrase in a document title that will cause that message to be highlighted and moved to the top of the inbox.

For example: If you set this to *Rush Order*, when the document title contains *Rush Order*, the document will be highlighted and moved to the top of the inbox.

Log-In Message

A message that displays on the log-in page and the home page:



Use this message to display:

- A legal warning of some kind.
  For example: *Unauthorized use of this site is illegal.*
- Notifications when the application or server is going down for scheduled maintenance.
- Other information relevant to users who are logging in.

NOTE:
- To format the log-in message, use the formatting buttons.
- To set a log-in message for a particular group, see Creating a Group.

Dashboard Message

A global message for all authenticated users that displays on the home page.

For example:

- A link to the latest Adobe Reader download to make sure all users can view the PDF files in Webdocs.
- Short tips on how to use Webdocs effectively for users who don't want to read the entire Webdocs User Guide.

> **NOTE:**
> To format the dashboard message, use the formatting buttons.

After making changes, click **Save Settings**

.

A message displays, telling you that the settings have been updated.

> **NOTE:**
> To see the changes, you need to log out and log back in. Any users who are logged in also won't see changes until they log back in.

Configuring Where Documents Are Stored in Webdocs

After installation, Webdocs is configured to store all new documents on the server in the folder C:\webdocdata\docs\. You can set up multiple folders for storing documents, but only one is the default where new documents are stored on check-in. This topic shows you how to change this default storage location.

Whenever you change the default storage location, all documents subsequently added to Webdocs are saved in the new default location. Documents that were already in Webdocs stay where they are. Webdocs can still find existing documents stored in the old location.

To define where new documents are stored on check-in:

1. Add the new storage location.
2. Make the new folder the default location.

Adding a New Storage Location

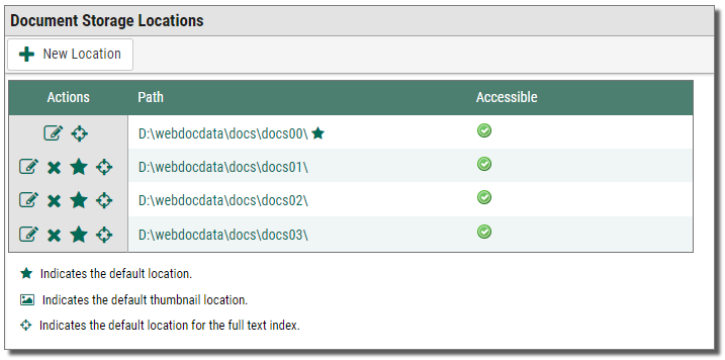
To add a location for storing Webdocs documents:

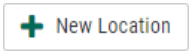
1. On the side menu of the **Settings** tab, click **Storage Locations**

.

   Document Storage Locations displays a list the storage locations and whether each location is accessible to read and write document files.

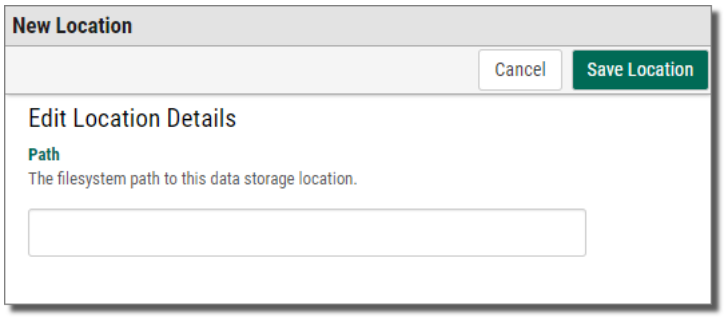
> **NOTE:**
> Ignore the thumbnail location. The thumbnail location does not apply to this version of Webdocs.



2. Click **New Location** 

.

   New Location displays.



3. In **Path**, type the path to the folder.
4. Click **Save Location**

.

   A confirmation message displays, letting you know that the location is saved.

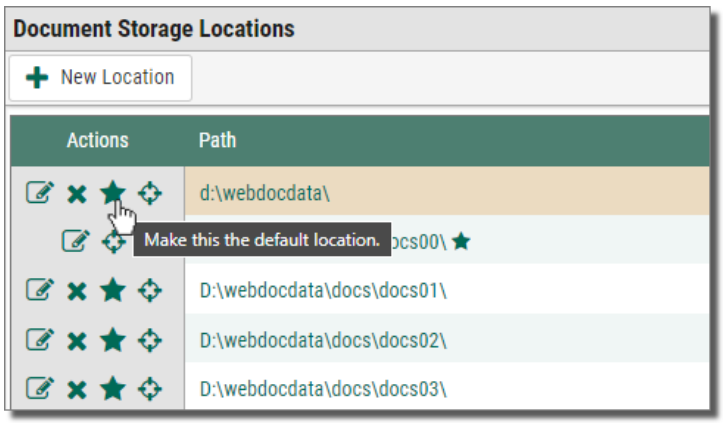
> **NOTE:**
> Documents uploaded to Webdocs will not be stored in the newly created location until you set the newly created location as the default location.

Changing the Default Storage Location

Documents that are uploaded to Webdocs are stored in whichever location is assigned as the default location. You can change which storage location is the default location.

To change the default storage location:

1. Next to the row of the storage location that you want to be the default location, click **Make this the default location** .



The location you chose is now the default location and has a star next to it to indicate that it is the default location.

NOTE:

- Changing the default location does not move documents that were added to Webdocs *before* the change. Webdocs still knows where to look for the old documents.
- You can also move the full-text index using the same instructions above, but should seldom need to.

Configuring the Integration Settings

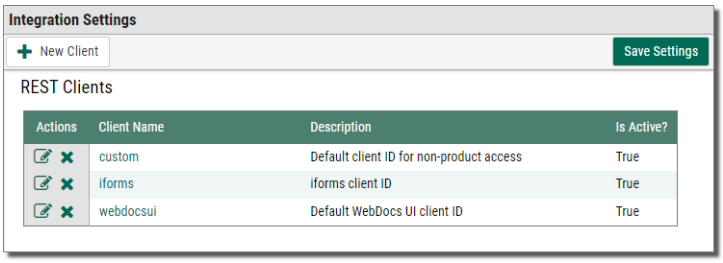
Webdocs can integrate with the Fortra Document Management products Enterprise Workflow and WebForms as well as other event-based settings.

To open, select from side menu of the Settings tab, the Integration Integration option. The Integration Settings screen displays. It is divided into the following sections:

REST Clients

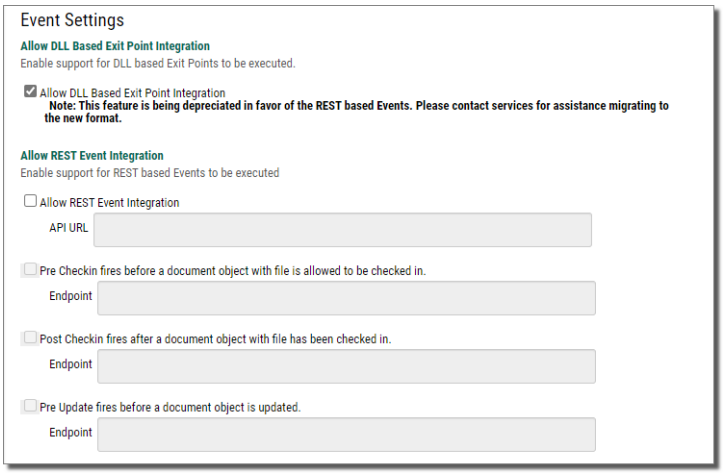
Applications that utilize the REST API require a Client ID to login which are defined here. It is recommended that each application uses its own Client ID for security and tracking purposes.

By default several are already created: **webdocsui** is used by the user interface in Webdocs, **iforms** is used by iForms integration, **custom** is used by the Swagger documentation and testing tool.



Event Settings

Events allow owners of Webdocs to subscribe custom listeners to specific actions in Webdocs. The older method, called Exit Points, involved deploying a .NET DLL to the Webdocs server with the customers custom code compiled inside it. This DLL had to be a very specific format to work with Webdocs. Exit Points have been depreciated and you should contact Services to migrate to the new Event format. If you are not using Exit Points, you should disable that feature here, which will improve performance and security of the product.



Events utilize a modern REST subscription model to respond to actions in Webdocs. Customers can write a program in any language on any machine that will receive and respond to events as long as it utilizes REST architecture. To utilize events, first enable the feature and then enable any even that you would like to utilize. Once a event is enabled, you can set the endpoint for the event. A suggestion is provided and may be overridden. Use the full URL to the REST event listener. You may utilize different listeners or the same listener as each event has the same format and the type of event is provided in the message body.

A sample Event Listener application has been provided in the installation folder of Webdocs. It includes definitions of the objects in Webdocs and a web page that displays events as they occur. For more information and assistance with this advanced feature of Webdocs, please contact our Services team.

Allow DLL Based Exit Point Integration - Check to enable support for DLL based Exit Points to be executed.

> **NOTE:**
> This feature is being depreciated in favor of the REST based Events. Please contact services for assistance migrating to the new format.

Allow REST Event Integration - Check to enable support for REST based events to be executed.

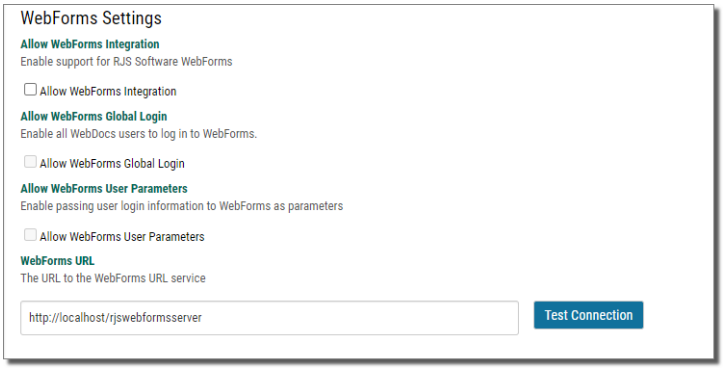
Enterprise Workflow Settings

Allow Enterprise Workflow Integration - Check to enable support for Document Management's Enterprise Workflow.

Allow Enterprise Workflow Global Login - Check to enable all Webdocs users to log in to Enterprise Workflow.

Enterprise Workflow URL - Enter the URL to the Enterprise Workflow web service. To test the URL, press the **Test Connection** button.

WebForms Settings



Allow WebForms Integration - Check to enable support for RJS Software WebForms.

Allow WebForms Global Login - Check to enable all Webdocs users to log in to WebForms.

Allow WebForms User Parameters - Check to enable passing user login information to WebForms as parameters.

WebForms URL - Enter the URL to the WebForms URL service. To test the URL, press the **Test Connection** button.

Configuring the Authentication Settings

Authentication settings allow you to configure Webdocs to authenticate a user's login name and password through an external source, such as a Lightweight Directory Access Protocol (LDAP) server.

> **NOTE:**
> Webdocs now works with any LDAP server, not just Active Directory.

Adding a New Authentication Server

This topic shows you how to add a new LDAP authentication server. Authenticating a Webdocs user account with an existing LDAP user account allows you to manage user credentials in one central location by using the existing network security resources in your LDAP server. Authenticating Webdocs users this way means that users have fewer user names and passwords to remember.

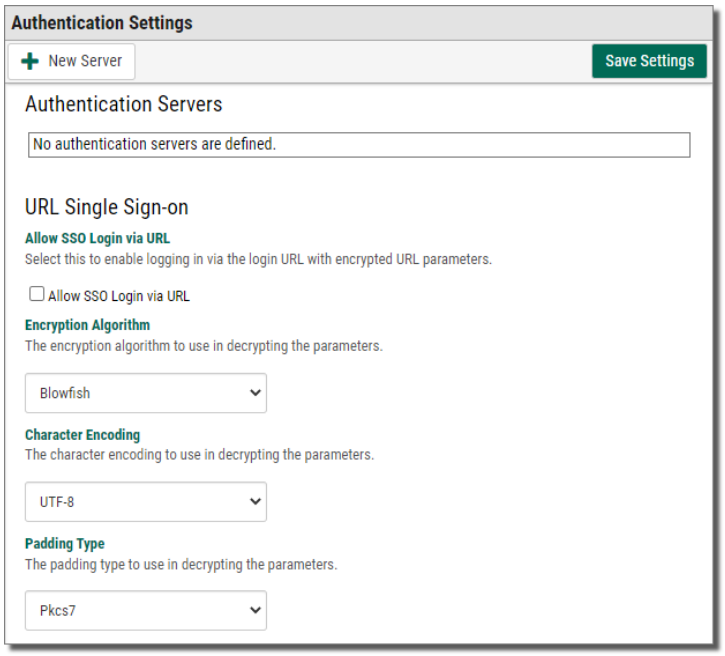
> **NOTE:**
> You must have an LDAP-compatible server set up and running to authenticate a user's log-in with LDAP. If you have any questions,contact Fortra.

To add a new server:

1. On the side menu of the **Settings** tab, click **Authentication**

option.

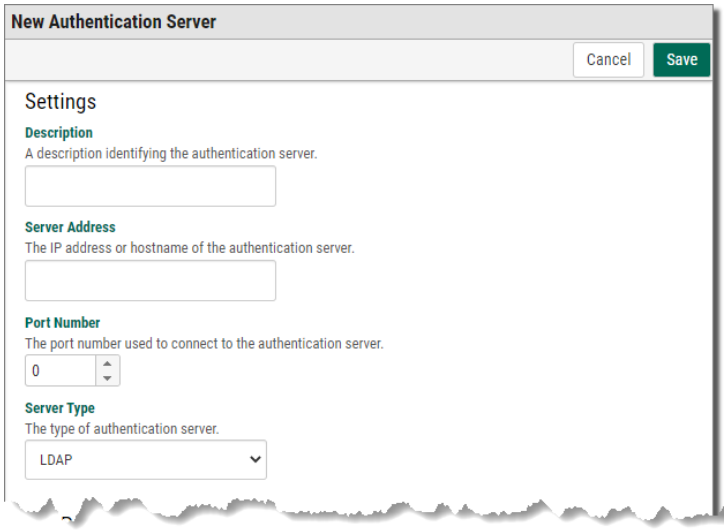
   The Authentication Settings display.



2. At the top of the Authentication Details screen, click **New Server**

.

   The New Authentication Server page displays.



3. Fill the new server's information based on the following:

Description - A description identifying the authentication server.

Server Address - The IP address or hostname of the authentication server.

Port Number - The port number used to connect to the authentication server.

Sever Type - The type of authentication server. (currently only LDAP is supported)

Domain Name - The name of the domain assigned to the LDAP server.

Base User Distinguished Name - The base DN to the user container.

User Authentication Type - The type of authentication to use tor the user. Select Basic for/to...., or Negotiate for/to .....

Use SSL - To indicate whether to use SSL to securely authenticate the user.

- **Secure Port Number** (when 'Use SSL' is checked) - The port number used to connect securely to the authentication server. (this option is only available if the 'Use SSL' option is checked)
- **Verify SSL Certificate** (when 'Use SSL' is checked) - To indicate whether to validate the authentication server's SSL certificate. This is highly recommended to ensure a secure connection. (this option is only available if the 'Use SSL' option is checked)

Use Separate User Credential- To indicate whether to use a separate credential to connect to the authentication server.

- **Server Credential Authentication** Type (when 'Use Separate User Credential' is checked) - The type of authentication to use for the server connection. Select Basic for/to...., or Negotiate for/to .....(this option is only available if the 'Use Separate Server Credential' option is checked)
- **Server Logon Name** (when 'Use Separate User Credential' is checked) - The name of the user to connect to the authentication server. (this option is only available if the 'Use Separate Server Credential' option is checked)
- **Server Logon Password** (when 'Use Separate User Credential' is checked) - The password of the user to connect to the authentication server. (this option is only available if the 'Use Separate Server Credential' option is checked)

4. At the bottom of the page, click **Save**

.

   A message displays, telling you the authentication server is added.

Setting Up Webdocs

This section shows you how to set up Webdocs. If you've already worked through the *Webdocs Workbook: A Planning Guide for Both Webdocs iSeries and Webdocs Windows*, you are already familiar with the terminology and have made preliminary decisions about users, groups, folders, Document Types, and permissions.

If you don't have a copy of the *Webdocs Workbook*, contact your Fortra project team or technical support.

For an overview of users, groups, folders, Document Types, and permissions, you can watch the short Webdocs videos available on http://support.rjssoftware.com/product/webdocs-windows#documentation. The videos in this series are:

1. Security - An Overview
2. Users & Groups - An Overview
3. Creating a User
4. Adding a User to a Group
5. Creating a Folder
6. Creating a Document Type
7. Permissions - An Overview
8. Assigning Permissions

To set up Webdocs, follow these topics in order:

1. ***Creating a User Account* on page 24**
2. ***Creating a Group* on page 26**
3. ***Adding Users to a Group* on page 27**
4. ***Creating a Folder* on page 29**
5. ***Creating a Document Type* on page 30**
6. ***Assigning Permissions* on page 34**

When you have finished with this section, see Managing Webdocs for more detail on administrative tasks in Webdocs.

> **NOTE:**
> Most of the Webdocs set-up tasks are on the Settings tab. Only Webdocs administrators have access to the Settings tab. Non-administrators do not see the Settings tab when they log in.

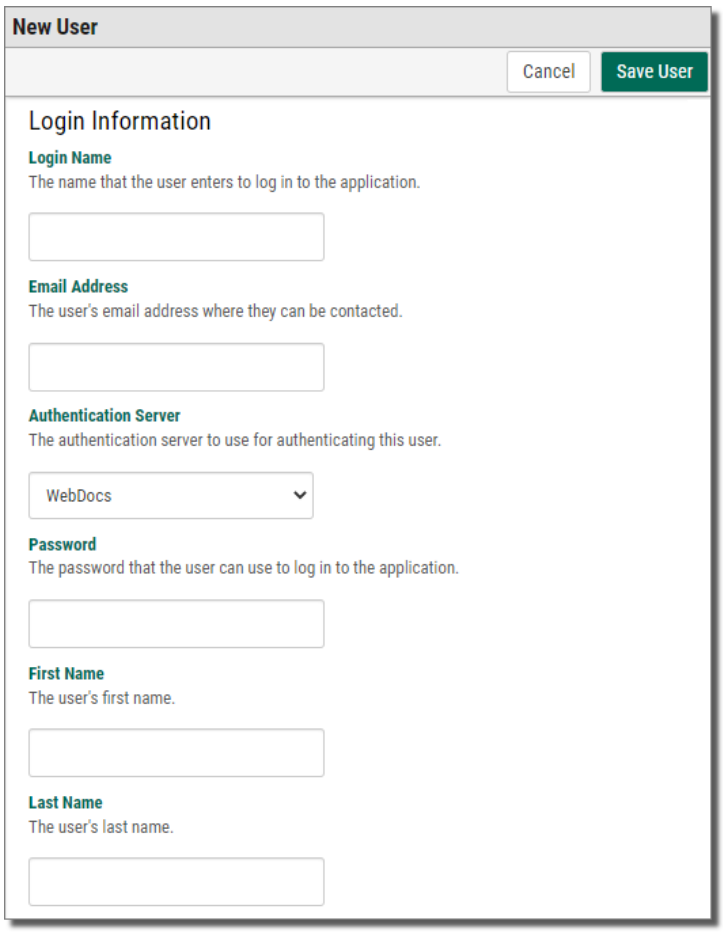
Creating a User Account

This topic shows you how to create a user account. Each user needs a user account to log in to Webdocs. Later, you can choose how users in groups can work with documents.

To create a user account:

1. On the side menu of the **Settings** tab, click **Users** Users .
2. Press the New User + New User button.

   The New User page displays.



3. Fill the new user's information based on the following:

   Login Name - A log-in name for the user.

   Email Address - The user's email address.

   Authentication Server - The authentication server to use for authenticating this user.

Password - A password for the user. The password is case-sensitive.

First Name - The user's first name.

Last Name - The user's last name.

Expiration Date - When the user's account will expire:

a. Click the field to display the calendar.

b. Scroll to the month and year.

c. Click the day that you want this user account to expire.

> **NOTE:**
> An expired user account still exists in Webdocs, but the user cannot log in until an administrator refreshes the expired account**.**

Copy User Group Memberships - If you want to copy another user's group memberships, click the box and choose the user to copy.

> **NOTE:**
> Giving this user the same group memberships as another user is a quick way to assign permissions.

Assign User Group Rights - If you have already set up groups, choose one or more groups to add the user to.

> **NOTE:**
> All new users are automatically added to the Default Group.

Phone Number,**Title**,**Company**, and **Description -** (Optional) Additional information that can be helpful if you need to contact the user.

Default Document Typeand**Default Folder -** (Optional) The default Document Type and folder, if this user will usually only check in documents to one Document Type or one folder.

> **NOTE:**
> This default will be available from any check-in interface: Webdocs, RJS Imaging Scan Workstation, Webdocs Tray Capture, and so on.

Enterprise Workflow Login Information and **WebForms Login Information -** The log-in information for Enterprise Workflow and WebForms, if you are integrating with either of those applications. For more information, see Configuring the Integration Settings.

4. At the bottom of the page, click **Save User**

.

A message displays, telling you the user account is created.

Creating a Group

A group is a collection of users that is used to manage security. You assign permissions for a group, and all the users within that group will have the group's permissions.

By using groups, you can:

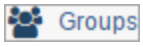
- Easily assign permissions for multiple users.
- Be sure that user permissions are consistent; everyone in a group starts with the same permissions.
- Update permissions for all users in a group with a single change to the group.

For example: Acme Co. has an accounting department of three people. Those three people have user accounts in Webdocs. The Webdocs administrator at Acme Co. creates a group called Accounting and adds the user accounts of the accounting employees to that group.

The Webdocs administrator at Acme Co. then assigns permissions to the Accounting group, and those permissions apply to all accounting employees. By assigning permissions to one group and not having to assign the same permissions three different times, the administrator saves time and is confident that all the users in the accounting department have the same permissions.

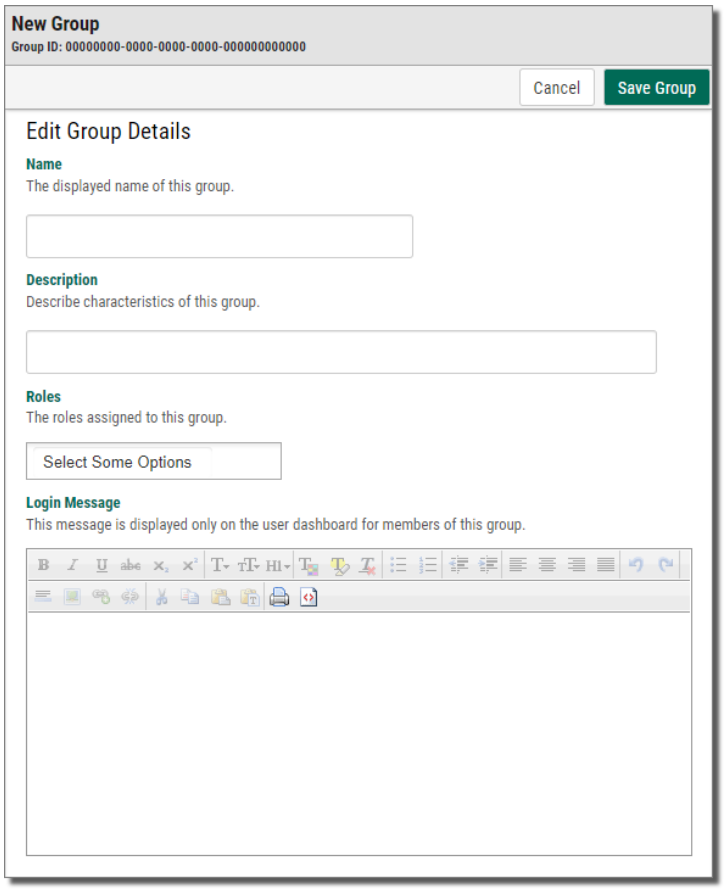
For more advanced ways to manage groups, see Managing Groups.

To create a group:

1. On the side menu of the **Settings** tab, click **Create New Group** 

.

   The New Group page displays.



2. In **Name**, type a group name.
3. In **Description**, type a group description.
4. In **Roles**, assign permissions to the group for different functions in Webdocs. The currently available roles are:

   iForms Admin - If you are also using the iForms product integration, this allows users in this group to administer iForms

   Report Viewer - This allows users to see the available Webdocs usage reports on their home screen.

   Route Design Administrator - This role is not used yet
5. (Optional) In **Login Message**, type a message for users in this group to see on the home page after logging in.
   - To format the log-in message, use the formatting buttons.
   - To set a log-in message for all users, see Customizing How Webdocs Displays.
6. Click **Save Group** Save Group .

   A message displays, telling you that the group is created.

Adding Users to a Group

Now that you've created users and created groups, you need to add users to the groups.

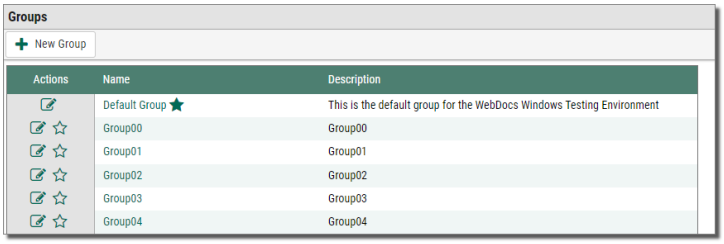
> **NOTE:**
> If you created groups before creating users, you can assign groups to users as you create them in Assign User Group Rights.

To add users to a group:

1. On the side menu of the **Settings** tab, click **Groups**

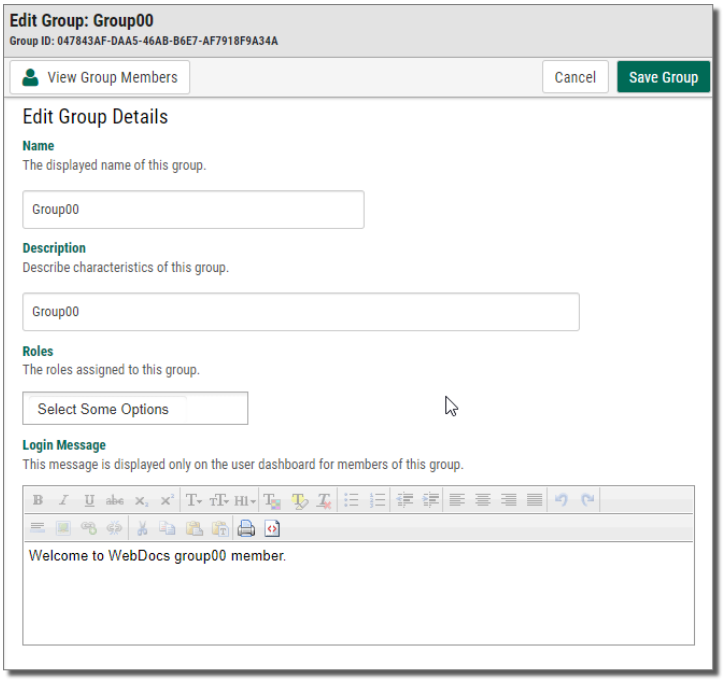
.

   The Groups page displays.



2. Next to the row of the group you want to add users to, click **Edit Group**
.

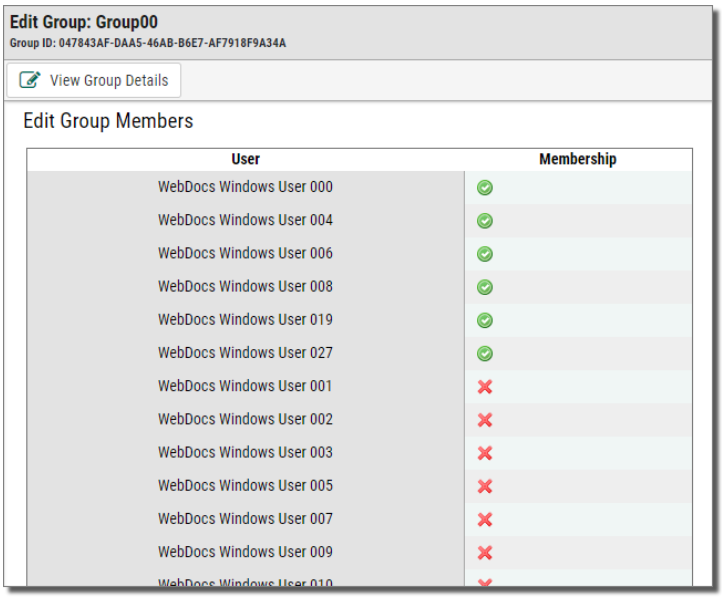
   The Edit Group page displays.



3. Click **View Group Members**

.

   The Edit Group Members page displays.



The example above shows a list of Users and their Membership in the group. The membership icon is a toggle where: ✅ indicates the user is a member of the group, and ❌ indicates the user is not a member.

4. Click either icon for a member to toggle membership on or off.

> **NOTE:**
> When you add users to a group, you do not have to save. Clicking **Add** ✅ both adds the user and saves that user to the group. So when you are done adding users to the group, you can leave the edit groups page and the users are successfully added to the group.

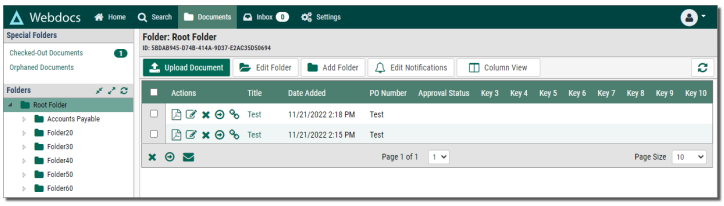
Creating a Folder

Folders are where documents are stored. However, in Webdocs, folders do not just organize documents. Folders also secure documents by determining how you allow users and groups access to documents. Webdocs permissions determine which user or group has access to which folder.

For more advanced ways to manage folders, see Managing Folders.

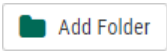
To create a folder:

1. Click the **Documents** tab.
   The Documents tab displays.



2. Click **Root Folder**.

   By clicking Root Folder you are selecting the root as the parent folder of the new folder. If you clicked the Documents folder, Documents would be the parent folder.

3. Click **Add Folder** 

.

   The New Folder page displays.

4. In **Folder Name**, type a name for the folder.
5. Click **Save**

.

   A message displays, telling you that the folder is created.

Creating a Document Type

This topic shows you how to create a Document Type. Before you create a Document Type, make sure you are familiar with how Document Types are used in Webdocs. See the *Webdocs Workbook*. If you don't have a copy of the *Webdocs Workbook*, contact your Fortra project team or technical support.

In Webdocs, you use Document Types as a way to organize the different kinds of documents. You can think of Document Types as labels for groups of similar kinds of documents. Document Types are one of the labels that users can search to find a document.

If you have the "Document Type and Title by Functional Area" worksheet from the *Webdocs Workbook*, use it to set up your Document Types.

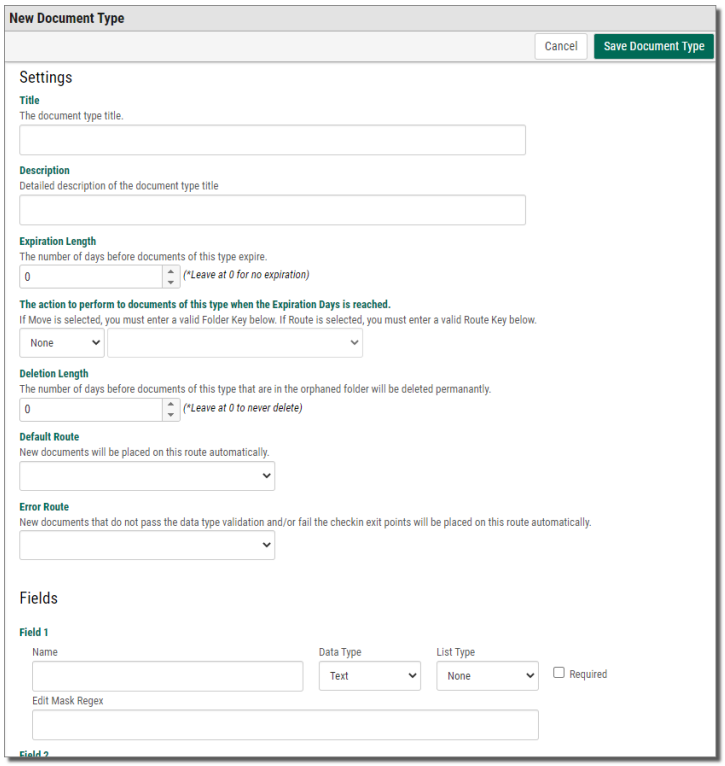
For more advanced ways to manage Document Types, see Managing Document Types.

To create a Document Type:

1. On the side menu of the **Settings** tab, click **Create New Document Type**

.

   The New Document Type page displays.



2. Set up the Document Type based on the following:

For...	Choose...
Title	Enter a name for the Document Type. **NOTE:** This isn't the title of the document. You add titles as you add specific documents.
Description	Enter a description of the Document Type.
Expiration Length	(Optional) The number of days before documents of this Document Type expire. Certain document types only need to be retained for 30 days, 60 days, 7 years, etc. for tax or audit purposes. This allows you to flag them in the database to either purge or archive them.

For...	Choose...
Action to Perform	Select one of the following actions that Webdocs will automatically take for each document of this document type when the expiration length is reached for the specific document: **None**: This is the default action. Nothing will happen when the document expires. **Move**: The document is moved to the specified folder when the document expires. This is a good option for archiving documents. **Orphan**: The document is placed in the Orphan folder, removing it from its original folder location. Using this with **Deletion Length** is a good option for deleting documents that are very old. **Route**: The document is placed on the selected route. This is a good option if documents need to be reviewed after a certain time period.
Deletion Length	Use to automatically remove documents from Webdocs' Orphaned folder when they have been deleted for X number of days. This will only delete items in the Orphaned folder and only if they have not been accessed for X days. Accessing a document will reset the counter. A value of zero means do not delete them ever.
Default Route	Automatically places all new documents checked into Webdocs with this document type on the specified route.
Error Route	Automatically places all new documents checked into Webdocs, that did not pass validation in an Exit Point, Rest Event, or Document Type Data Type rule, onto the selected route for review. This is a good option if you are using automated check-in, so that documents are not left on the other systems.

For...	Choose...
Field 1-30	Define up to 30 fields with the following: **Name**: Name of the search key with that number. For example: ***Invoice Number***, ***Vendor Name***, or***Vendor Number***. **Data Type:** Document Type Fields can have built in validation for a specific type of data. This feature utilizes Regular Expressions (Regex) to validate the incoming data and can deny the checkin of new documents if the data passed does not match the defined regex. Users receive messages when checking in a new document about the specific field and data type that did not pass validation. • **Text** is the default, which allows all keyboard characters to be entered. You can write custom Regex to validate the Text type differently. Regex must be in the format of Microsoft's Regular Expressions which can be different from other languages. Please contact services for assistance. • **Integer** allows whole numbers 0-9 only. • **Float** allows decimal values like currency.~~Boolean allows only true/false values. • **DateTime** allows a specific date time format in MM/DD/YYYY HH:MM:SS • **Date** allows a specific date format in MM/DD/YYYY • **Time** allows a specific time format in HH:MM:SS • **Link** validated on data entry as a URL. When loading the document details screen, the field label will be underlined and clickable. Clicking will open the link in a new tab. • **KeyLink** dynamically created URL based on one of many available fields. When loading the document details screen, the field label will be underlined and clickable. Clicking will open the link in a new tab. See ***Key Link Field Types* on page 91** for the full list **List Type**: Allows definition of a drop down list for the field that will appear on the document edit UI. Select one of the following: • **None** is the default is none, which means no list is shown. • **Optional** means the user may choose from the given list or they may enter their own value. • **Required** means they can only chose from the list. If you choose Optional or Required, you must press the **Save**

For...	Choose...
	Document Type at the top of the screen, then you can use the **Edit Field Values** option to create a field list. **Required**: Check to require a user fill this field during check-in.

3. At the bottom of the page, click **Save Document Type** Save Document Type .

   A message displays, telling you that the Document Type is created.

   TIP:
   Meet with your Webdocs users to explain what kinds of documents should be assigned to which Document Types. Also explain any potentially confusing search keys.
   By making sure all users assign Document Types and search keys in the same way, you can reduce the time spent searching for documents and make working with documents easier.

- a
- b

  XXXXX
  bbbbbb
  cccc

- c

Assigning Permissions

Permissions are how you give users access to the folders and documents they need to do their work, while also keeping Webdocs secure.

Some users need more permissions because they need to do more complex work with documents and need access to many folders. Other users might only do simple tasks with a few documents in one folder. For users doing simple tasks, you might allow just one permission.

TIP:
To maintain the maximum level of security, Fortra recommends that you allow the minimum number of permissions that users need to do their work. If a user does not need a permission, do not give them that permission.

There are seven permissions you can assign in Webdocs.

With this permission...	Users can...
View	• See a folder and the documents in it, but only documents assigned to a document type with this permission. **NOTE:** **Note:** By default, all groups and users can view the Root Folder. • Save a document to their computer. • Open, close, edit, print, and email the copy of the document on their computer. **NOTE:** **Note:** With only the view permission, a user cannot save an edited document back to Webdocs. To save an edited document back to Webdocs, a user needs the check-out and check-in permissions.
Download	• Download documents from folders.
Move	• Move documents from folders they can view to other folders they can view.
Delete	• Remove documents that they can view to orphaned documents.
Add Notes	• Add notes to documents that they can view.
Checkin	• Upload documents with a document type to a folder where both document type and folder are assigned this permission. • Check in documents they have checked out. **NOTE:** **Note:** Users must also have the check-out permission to edit documents and save them back to Webdocs.

With this permission...	Users can...
Checkout	• Download and edit a document and then save the edited version back to Webdocs. • Change a document's information, like the Document Type and search-key values. **NOTE:** **Note:** Users must also have the check-in permission to save checked-out documents back to Webdocs. Also, while the document is checked out, other users can view it, but other users cannot edit the document or change its information. When the user checks in the edited document, the edited document becomes the current version in Webdocs. That current, edited version is the one that all other users will work with.
Email	• Email documents from Webdocs.

Each of these seven permissions has three settings:

Choose this setting...	To...
☑	Allow this permission.
⊟	Deny this permission. A user who is denied a permission cannot see the buttons associated with that permission. For example: If Amanda is allowed the View permission to the Accounting folder but is denied the Delete permission to the Accounting folder, Amanda cannot even see the Delete button for any documents in the Accounting folder.
☐	Leave this permission unspecified or inherited. A user may be allowed or denied this permission, based on how that permission is defined elsewhere for the user.

For more advanced information on how permissions work together, see Managing Permissions.

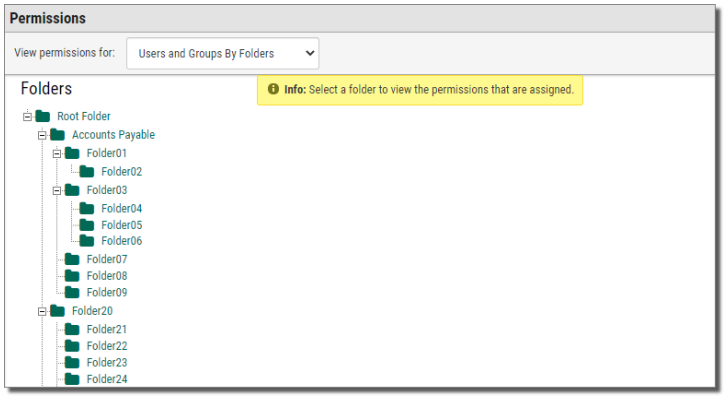
Assigning Permissions to a Folder for a Group

Assigning permissions to a folder for a group means that everyone in the group has the permissions allowed to that group. This is the simplest and most common type of permission. For more advanced ways to assign permissions, see Managing Permissions.

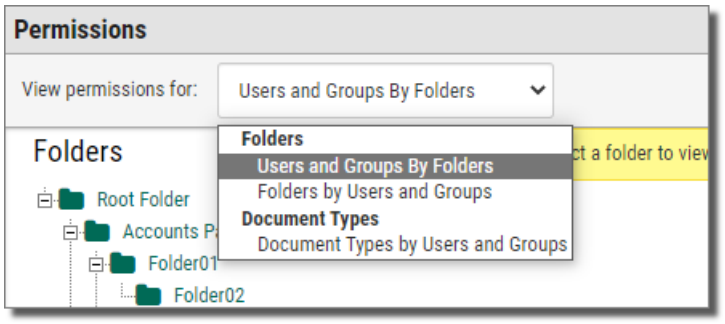
To assign permissions to a folder for a group:

1. On the side menu of the **Settings** tab, click **Permissions** Permissions .

   Permissions displays.



2. In the **View Permissions For:** drop-down, select **Users and Groups by Folder**.

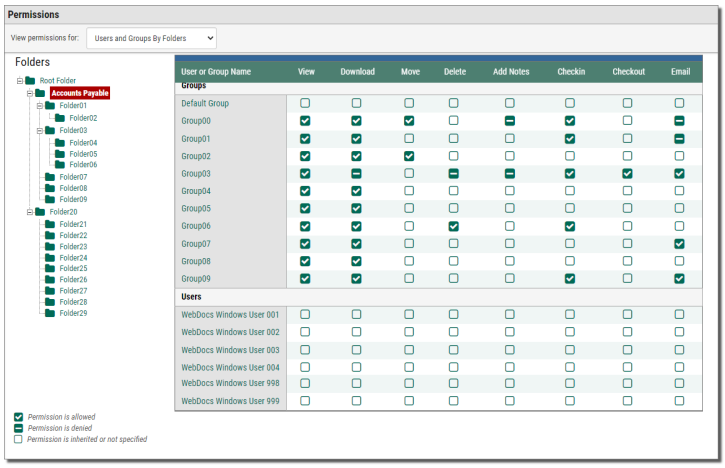


3. Click the folder you want to assign permissions to.

> **NOTE:**
> Allowing permissions to a folder does not automatically allow permissions to a sub-folder. To allow permissions to a sub-folder, repeat these instructions for the sub-folder.

   The folder is highlighted red, and the list of groups, users, and permissions displays to the right of the highlighted folder.

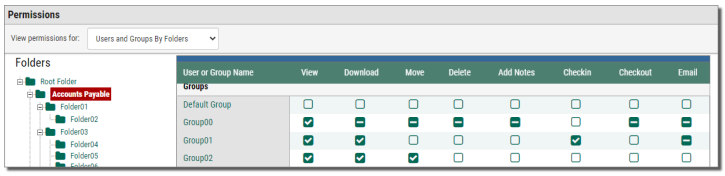
   This is what a folder looks like before you assign permissions to it:



NOTE:
The first time you assign permissions, all groups and users have unspecified or inherited permissions. When all permissions are unspecified or inherited, no one can access this folder.

3. Assign a permission by clicking the icon in the column of the permission. Clicking an icon switches between **allow** ☑, **deny** ⛔, and **unspecified** ☐.

   For example: Below, users in the Group 00 group can only view documents in the Accounts Payable folder.



4. Continue setting the permissions.

TIP:
Set permissions for all the groups when you create a new folder. Users' permissions can be left unspecified - in this case, their permissions will be inherited from the groups they belong to.

Managing Webdocs

This section is divided into the following topics:

Managing Inboxes

Managing Documents

Managing User Accounts

Managing Groups

Managing Folders

Managing Document Types

Managing Permissions

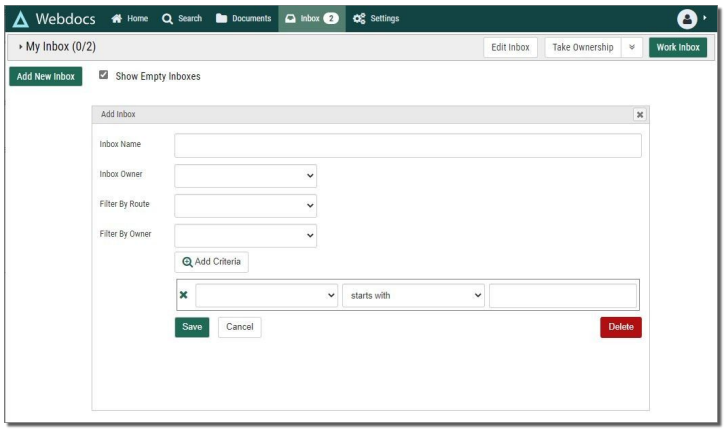
Using Full-Text Indexing

Managing Inboxes

Routing Inboxes in Webdocs provide users with different views of the documents that are assigned to them. By Default, each user is given a 'My Inbox' containing all documents they have permissions to see via the route steps they are assigned to.

Add an Inbox

1. Administrators and groups with the 'Inbox Designer' role can create and share additional inboxes with users using the **Add New Inbox** button on the Inbox screen.

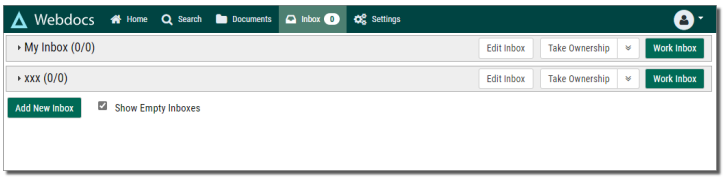


2. Give the inbox a name--this is what users will see on the Inbox screen. It doesn't have to be unique, but consider it good design practice to use unique names.
3. Select the owner of the inbox. The owner will always be a group, unless you are the owner. You cannot create an inbox for another user.
4. Use one of the filter options to define which documents should be displayed in the inbox. You do not have to use any filter, but if you don't choose at least one option, a duplicate of the My Inbox filter is used.

   Filter by Route: Use this option to limit the inbox selection to only items on the chosen route.

   Filter by Owner: Use this option to limit the inbox selection to route documents owned by a specific user. Use the 'Unassigned', option to filter all un-owned route documents.
5. Click **Add Criteria** to add additional search parameters such as Document Title, Keys 1-30, or Step Title.
6. Click **Save** to make the inbox available to the specified owner when they refresh their screen.

Edit or Delete an Inbox



To edit an inbox, click **Edit Inbox** Edit Inbox on the inbox. While viewing the inbox filters, you can also choose to delete the inbox. Use caution as this will delete the inbox for all users. These options are only available to the inbox owner and only if they have the Inbox Designer role.

Managing Documents

Usually, Webdocs users only work with documents: add them to the system, search for them, view them, print them, edit them, and so forth. In most organizations, Webdocs administrators do the document-management tasks described here.

Importing Documents to Webdocs Initially

Moving a Document from One Folder to Another

Adding a Document to a Document Route

Managing Deleted Documents

Importing Documents to Webdocs Initially

Initially importing documents to Webdocs will be part of your installation project, and your Fortra project team will help you transfer your documents to Webdocs.

Once Webdocs is up and running, documents are added to Webdocs by:

- Uploading
- Scanning
- Importing
- Adding directly from other applications

For more information, see "Appendix C: Setting Up Other Applications with Webdocs" and "Adding Documents" in the *Webdocs - Windows Edition User Guide*: http://support.rjssoftware.com/product/webdocs-windows#documentation.

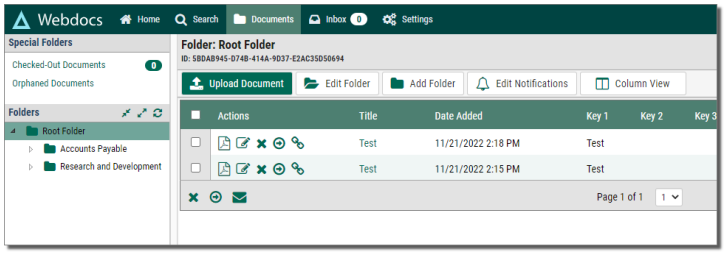
Moving Documents

This topic shows you how to move a document from one folder to another.

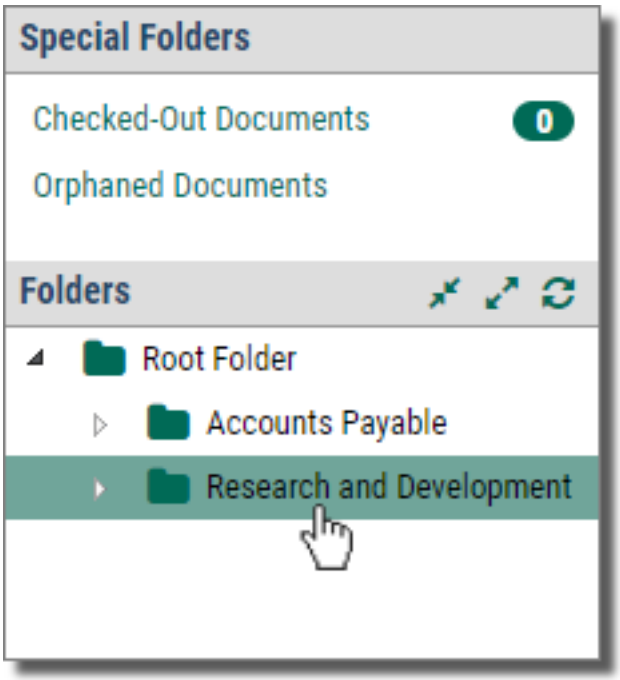
> **NOTE:**
> Your administrator may not have given you permission to move documents.

1. Click the **Documents** tab.

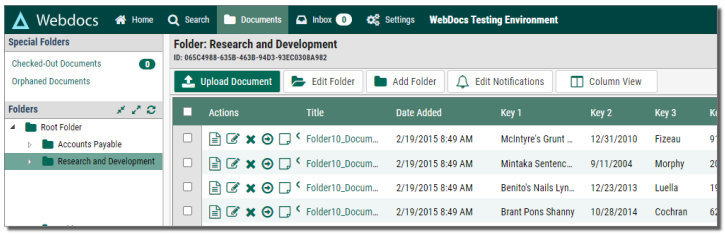
   Documents display.



2. Click the folder of the document to move.

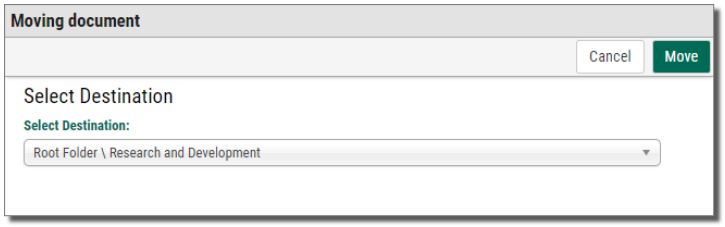


   The contents of the folder display.



3. Next to the document to move, click **Move Document** .

Moving Document displays.



4. In **Select Destination**, choose the folder to move the document to. Make sure you pay attention to the folder structure.
5. Click **Move** Move .

   The document is moved to the folder you chose.

Routing Documents

Webdocs uses routing to automate the manual process of moving a document from person to person for approval. Your Webdocs administrator may have set up routes for your organization or department.

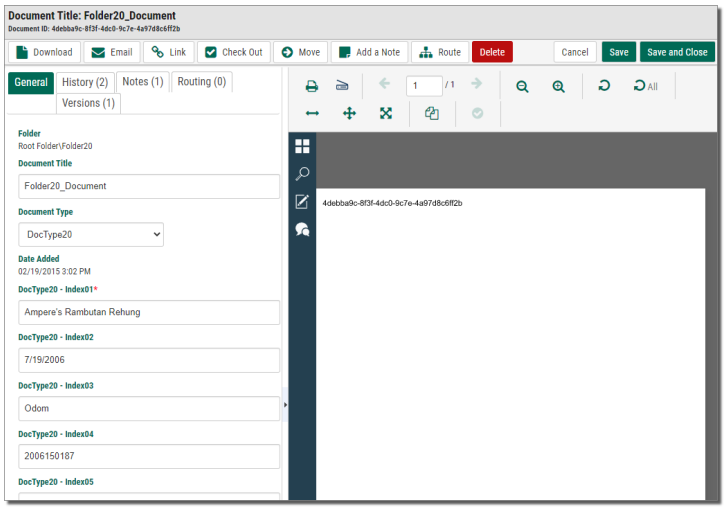
Adding a Document to a Route

To add a document to a route so that other users can approve it:

> **NOTE:**
> Before you begin, make sure your administrator has told you which routes to use.

1. On the side menu of the **Documents** tab, click the folder of the document to add to a route j(you can also access a list of documents with either a folder list or a search list), and click **View document details** next to the row of the document to add to a route.

   The document's information displays.

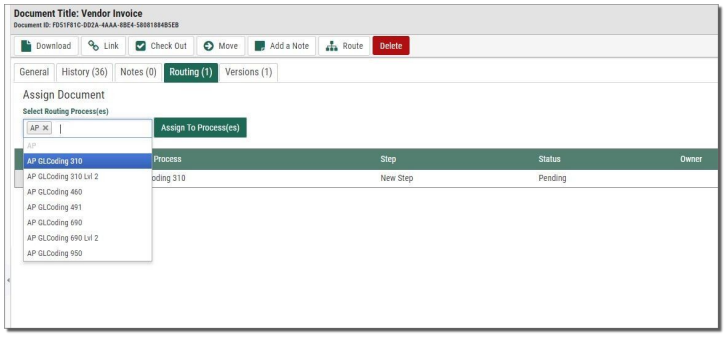


The preview panel is open on the right by default.

2. Click the **Route** tab

.

   The route tab shows users all the route history for a document, including active routes.



3. In **Select Routing Process(es)**, choose the route to add this document to. If more than one route is available, you can choose more than one route. You may not add a document to a route a second time unless that previous route is completed.
4. Click **Assign to Process(es)**

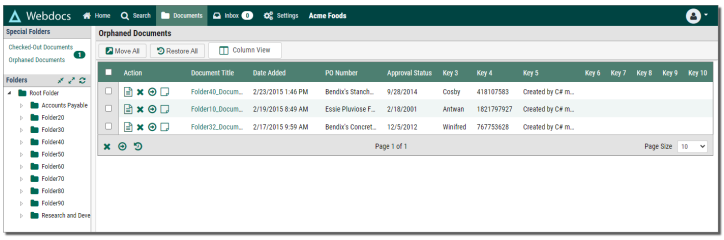
.

   A confirmation message displays, and the new route is displayed in the route history list.

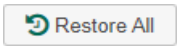
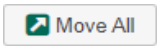
Managing Deleted Documents

When users delete documents, they do not permanently delete the documents from Webdocs. Instead, deleted documents move to the Orphaned Documents folder.

The Orphaned Documents folder is visible only to administrators. On the side menu of the **Documents** tab, click **Orphaned Documents**:



You can manage deleted documents in the following ways:

To...	Do this...
Delete documents from Webdocs permanently	Either: • In the row of each document to delete permanently, click **Delete Document** . • Check one or more documents and then click **Delete Selected** in the lower-left corner. **NOTE:** If you have many expired documents in Webdocs that you want to purge from the system at one time, contact Fortra for help purging documents.
Restore documents to the Webdocs folder they were originally deleted from	Either: • Check one or more documents and then click **Restore Selected** in the lower-left corner. • Click **Restore All**  to restore all the documents currently in Orphaned Documents.
Move documents to another Webdocs folder	Either: • In the row of each document to move, click **Move Document** . • Check one or more documents and then click **Move Selected** in the lower-left corner. • Click **Move All**  to move all the documents currently in Orphaned Documents.

Managing User Accounts

Each user has a user account to log in to Webdocs. Users belong to groups, and users and groups have permissions that allow or deny them access to documents. For basic information about users and how to create user accounts, see Creating a User Account and Planning for a Successful Set-Up.

This section shows you how to manage user accounts in the following ways:

Activating and Deactivating a User Account

Editing a User Account

Making a User an Administrator

Refreshing an Expired User Account

Managing User Passwords

Viewing User Activity

Emailing a Webdocs User

Deleting a User Account

Activating and Deactivating a User Account

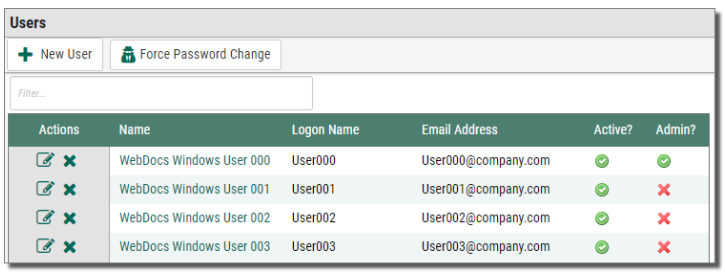
Deactivating a user means the user cannot log in. The user's information is still in the system so that audit trails are maintained.

If inactive users try to log in to Webdocs, the message *Error: access denied. Please contact your system administrator* displays on the log-in page.

Active users can log in to Webdocs and have all their allowed permissions.

To deactivate or activate a user:

1. On the side menu of the **Settings** tab, click **Users** Users .
   The Users page displays.



2. In the **Activate** column, click to toggle between **active** and **inactive** .

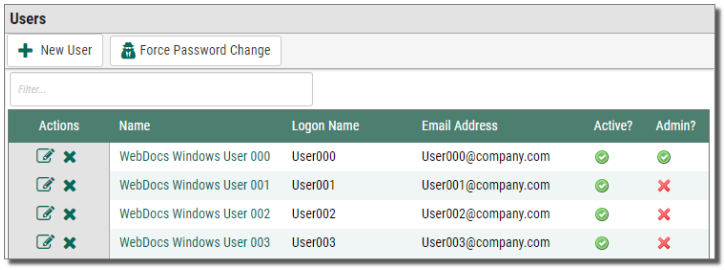
Editing a User Account

Editing the user account allows you to change names, passwords, and email addresses.

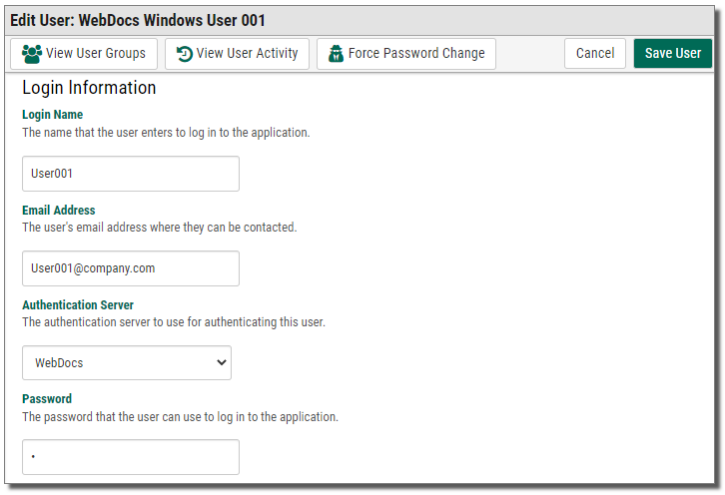
TIP:
If you have not yet reviewed your administrator account, do so now to make sure you have the correct name and email address assigned to your account.

To edit a user account:

1. On the side menu of the **Settings** tab, click **Users** Users .
   The Users page displays.



2. Next to the user account to edit, click **Edit User** .
   The Edit User page displays.



3. Edit as needed.

   For more information, see Creating a User Account.

4. Click **Save User**

.

   A message displays, telling you that the user account is updated.

Making a User an Administrator

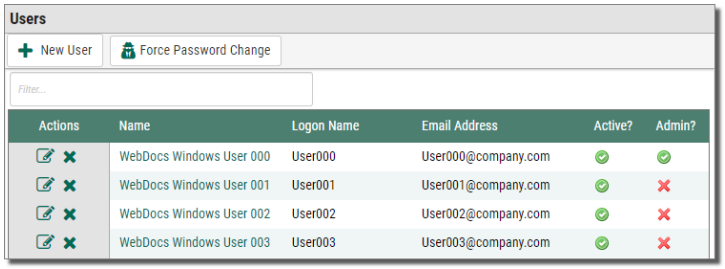
A Webdocs user with administrator rights has access to the Settings tab and thus can add new users and groups, set up new Document Types and folders, and many more of the tasks described in this administrator guide.

To make a user an administrator:

1. On the side menu of the **Settings** tab, click **Users**

.

   The Users page displays.



2. In the **Admin?** column, click to toggle between **administrator** and **not**

administrator ✖ .

Refreshing an Expired User Account

When you set up a user account, you set an expiration date. If users try to log in after their expiration date has passed, they get a message like this:

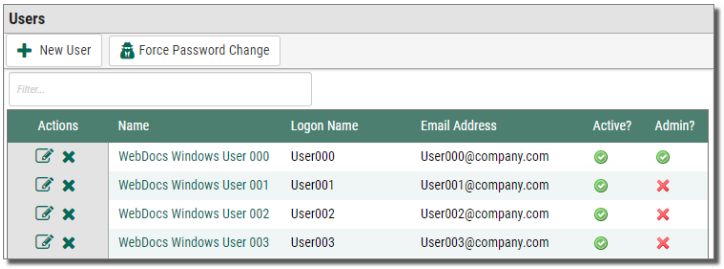
> *3/19/2022 12:04:18 PM: Access for user XXXXX denied. Please contact your system administrator.*

The user expiration date helps make sure that only current users have access to Webdocs and helps filter out users that are not actively using Webdocs. You also may have interns or temporary employees. In this case, you can set the expiration dates so that the system will automatically disable their user accounts after their contract periods expire.

To refresh an expired user account:

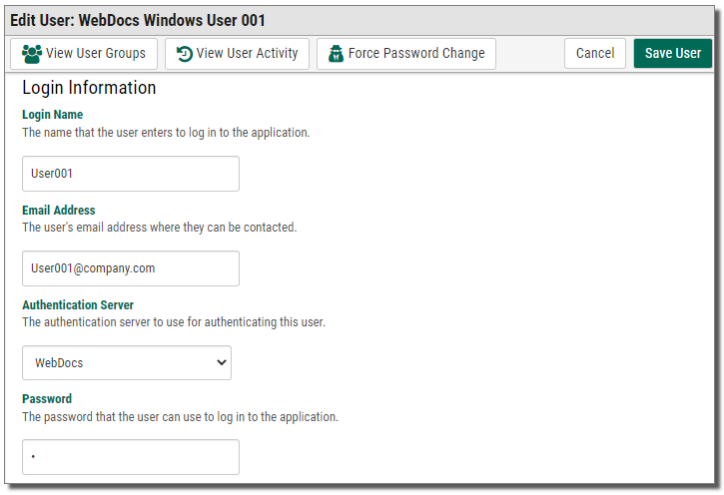
1. On the side menu of the **Settings** tab, click **Users** Users .

   The Users page displays.

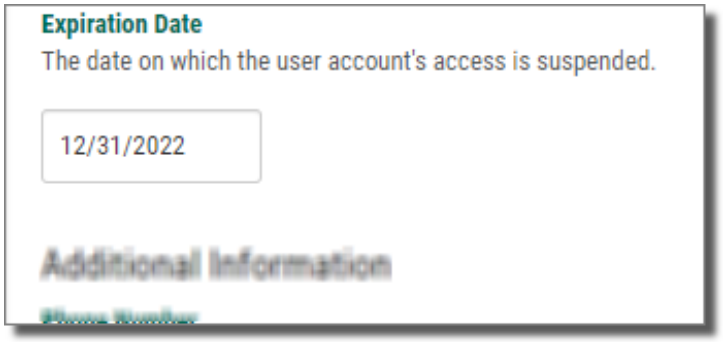


2. Next to the user account to edit, click **Edit User** .

   The Edit User page displays.



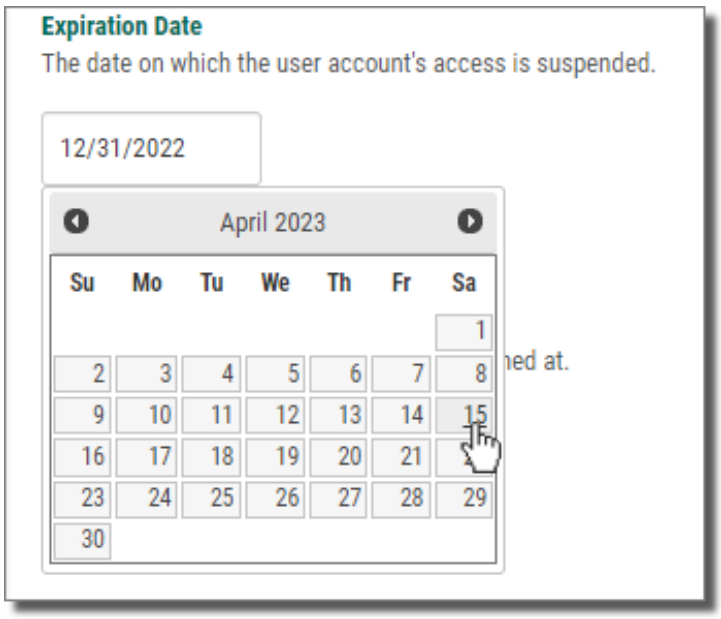
3. Click the **Expiration Date** field.



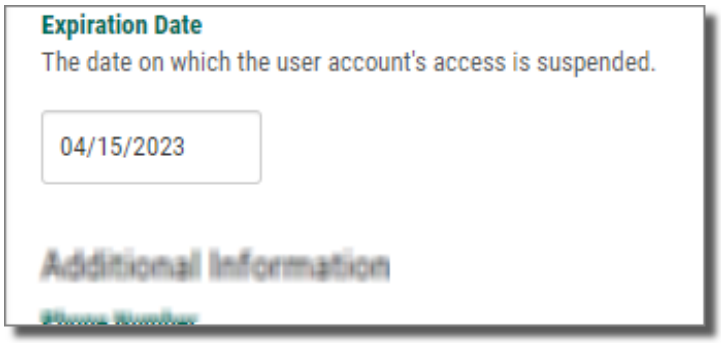
A calendar displays.

The example below shows that the current expiration date for this user account is on December 31 and that today's date (highlighted in yellow) is December 26.

4. Scroll to the new expiration date and click it.



The new expiration date displays.



5. Click **Save User** Save User .

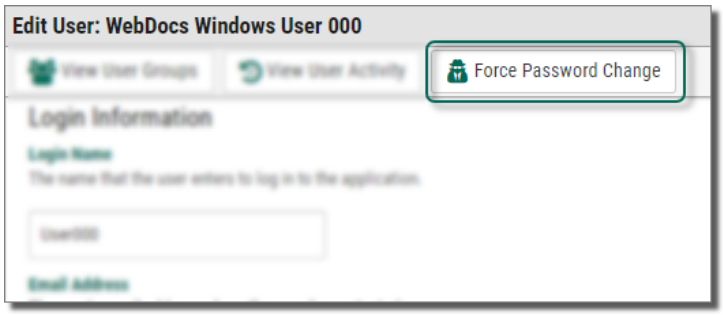
   A message displays, telling you that the user account is updated, and the user account is refreshed.

Managing User Passwords

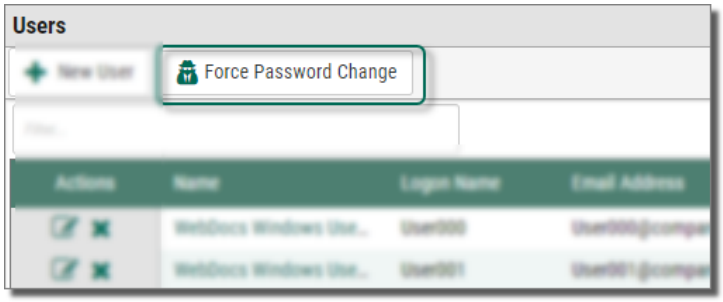
Administrators can manage user passwords by:

- Manually changing a user's password by editing the user and changing the **Password**setting.
- Forcing a specific user to change their password the next time they log in:

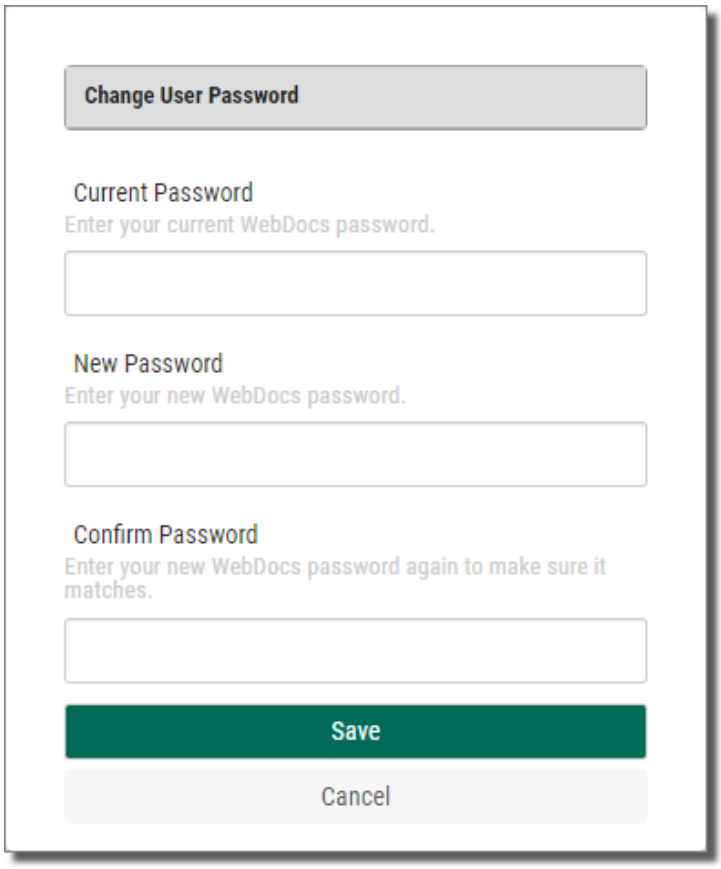
  On the side menu of the **Settings** tab, click **Users** Users , click **Edit User** , and then click **Force Password Change** Force Password Change .



- Forcing *all* users to change their passwords the next time they log in:
  On the side menu of the **Settings** tab, click **Users** Users and then click **Force Password Change** Force Password Change .



When you force a user to change their password, the next time they log in to Webdocs, a page displays that requires them to type their old password and choose a new password.



After they click **Save**, they are logged in to Webdocs, and a message that they have changed their password.

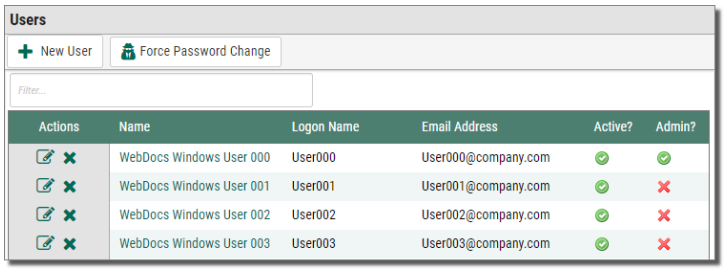
Viewing User Activity

This heading shows you how to view a user's Webdocs activity. You can view the following user activity:

- When a user logged in.
- Which documents a user viewed and when that user viewed them.
- Which documents a user checked in or out and when that user checked them in or out.
- Which documents a user deleted and when that user deleted them.
- Which documents a user emailed and when that user emailed them.

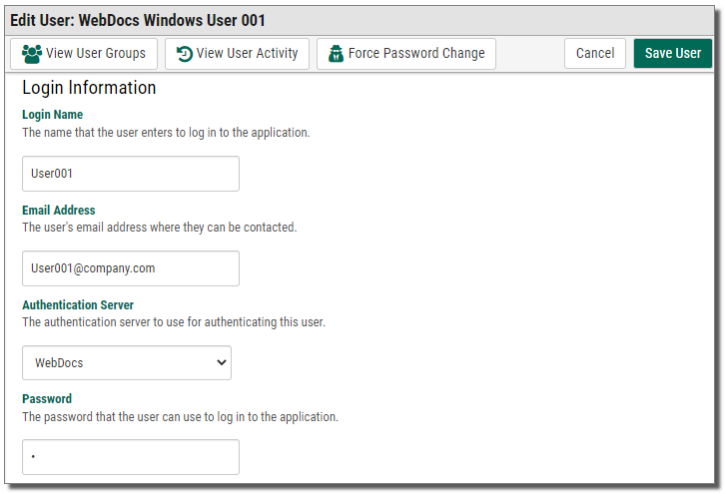
To view user activity:

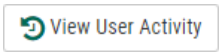
1. On the side menu of the **Settings** tab, click **Users** Users .
   The Users page displays.



2. Next to the user account to view activity for, click **Edit User** .

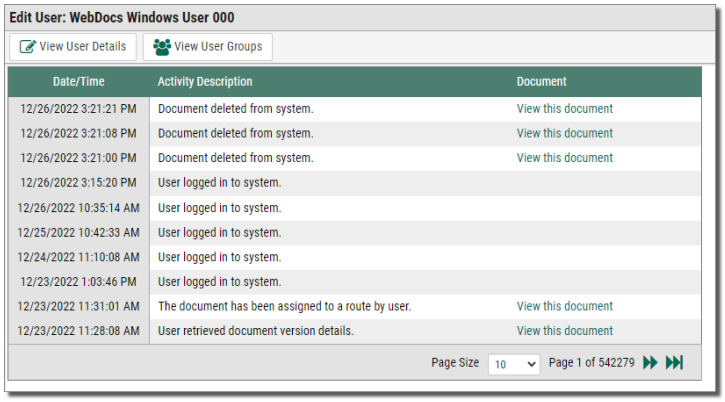
   The Edit User page displays.



3. Click **View User Activity** 

.

   The 10 most recent instances of the user's activity display.



4. To view older and newer activity, click **Previous** and **Next** .

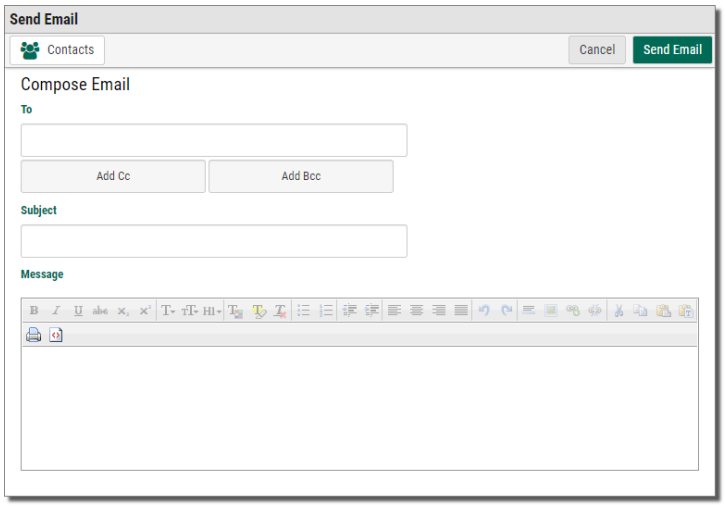
Emailing a Webdocs User

This topic shows you how to email a Webdocs user from Webdocs.

To email a Webdocs user:

1. On the side menu of the **Settings** tab, click **Send Email** Send Email .

   The Email Users page displays.



2. Type the To address, subject, and message. If you have multiple To addresses, separate them with commas.

   NOTE:
   After you type three characters of a name that is in the system, suggestions display. Click a name to accept it.

3. Click **Send Email** Send Email .

   A message displays, telling you that the email is sent.

Deleting a User Account

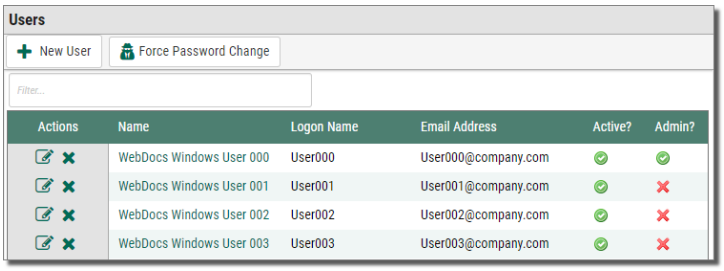
When you delete a user account, you lose the link between the user and the documents this user has added, looked at, and worked with in the past. It doesn't delete the actual history information; it just can't be linked to a specific user any more. Only delete a user account if your organization doesn't need an audit trail.

TIP:
Instead of deleting users, make them inactive.

If you have to delete a user:

1. On the side menu of the **Settings** tab, click **Users** Users .

   The Users page displays.



2. Next to the row of the user to delete, click **Delete User** .

   A confirmation dialog box displays.
3. Click **OK**.

   The user is deleted.

Managing Groups

A group is a collection of users that is used to manage security. You assign permissions for users in Webdocs based on the groups that those users belong to. For basic information about groups and how to create groups, see Creating a Group and Planning for a Successful Set-Up.

This section shows you how to manage groups in the following ways:

Changing the Default Group

Deleting a Group

Changing the Default Group

The group *Default Group* comes installed with Webdocs. At installation, the Default Group is also the group with the **default star** next to it.

The **default** group is the group to which Webdocs assigns all users created by:

- Administrators.
- If you allow users to self-register, users who self-register.

> **TIP:**
> Unless you need to, do not change the **default** group. If you do change the **default** group, do not change it often.

By being consistent with the **default** group, you can better control Webdocs security by allowing minimal permissions for it. If **default** group has minimal permissions, you know that

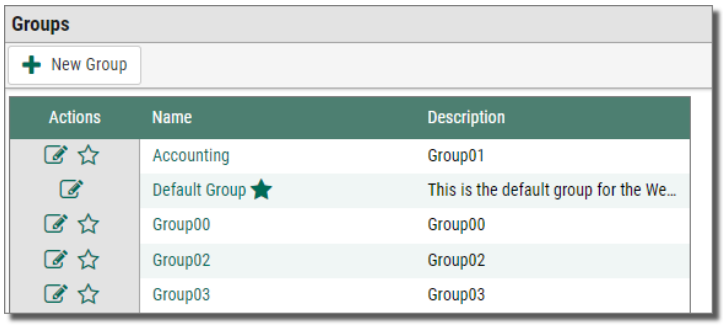
when you create a user that user will have the minimal permissions until you put the user in another group or allow permissions to the user directly.

When you change the **default** group, all user accounts in Webdocs automatically become members of the **default** group.

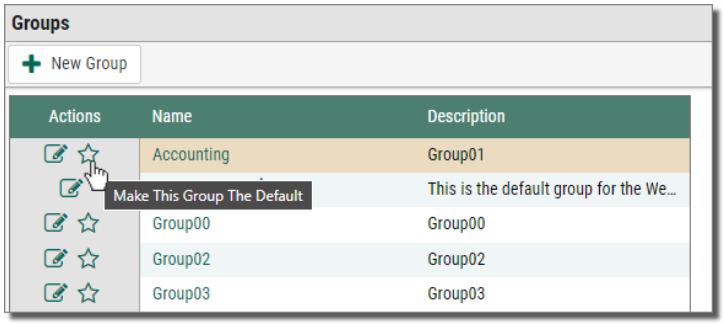
To change the **default** group:

1. On the side menu of the **Settings** tab, click **Groups** Groups .

   The Groups page displays.



2. Next to the row of the group that you want to be the **default** group, click **Make This Group The Default** .



   The **Default** icon displays next to the Accounting group.

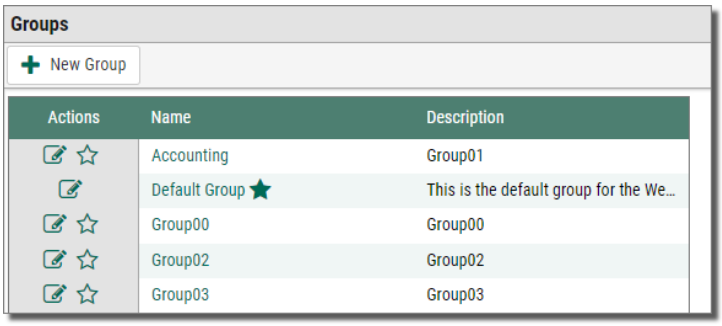
   Now all current users and all newly created users automatically become part of the Accounting group.

Deleting a Group

To delete a group:

1. On the side menu of the **Settings** tab, click **Groups** Groups .

   The Groups page displays.



2. Next to the row of the group to delete, click **Delete Group** .
   A confirmation message displays.
3. Click **OK**.
   The group is deleted.

Managing Folders

Webdocs uses virtual folders for security. Documents are stored in folders. Users and groups are given permission to access specific folders. For basic information about folders and how to create folders, see Creating a Folder and Planning for a Successful Set-Up.

This section shows you how to manage folders in the following ways:

Setting Up Notifications When Documents Are Added

Changing a Folder Name

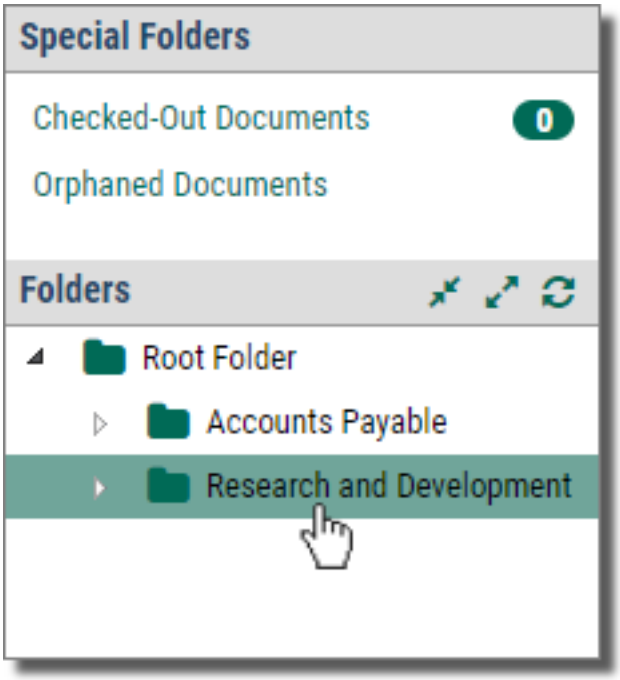
Deleting a Folder

Setting Up Notifications

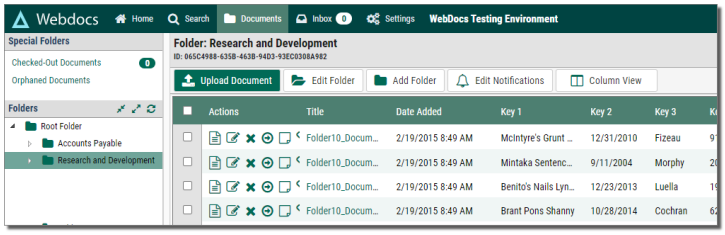
If you are responsible for documents in a specific folder, you can set up email notifications when a document is added to that folder so you can do your work faster and more efficiently.

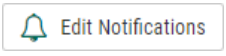
To receive an email notification when a document is added to a folder:

1. Click the **Documents** tab followed by the folder to set up email notifications for.



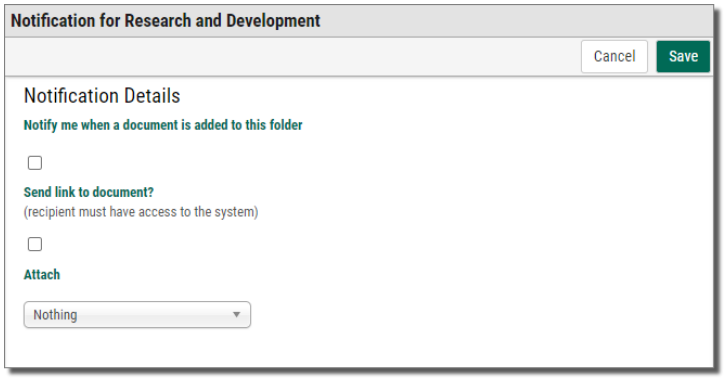
The contents of the folder display.



2. Click **Edit Notifications** 

.

The Notification page for the folder displays.



3. Check **Notify me when a document is added to this folder**.
4. (Optional) Choose whether to:

- Send a link to the document in Webdocs.
- Attach the document to the email.

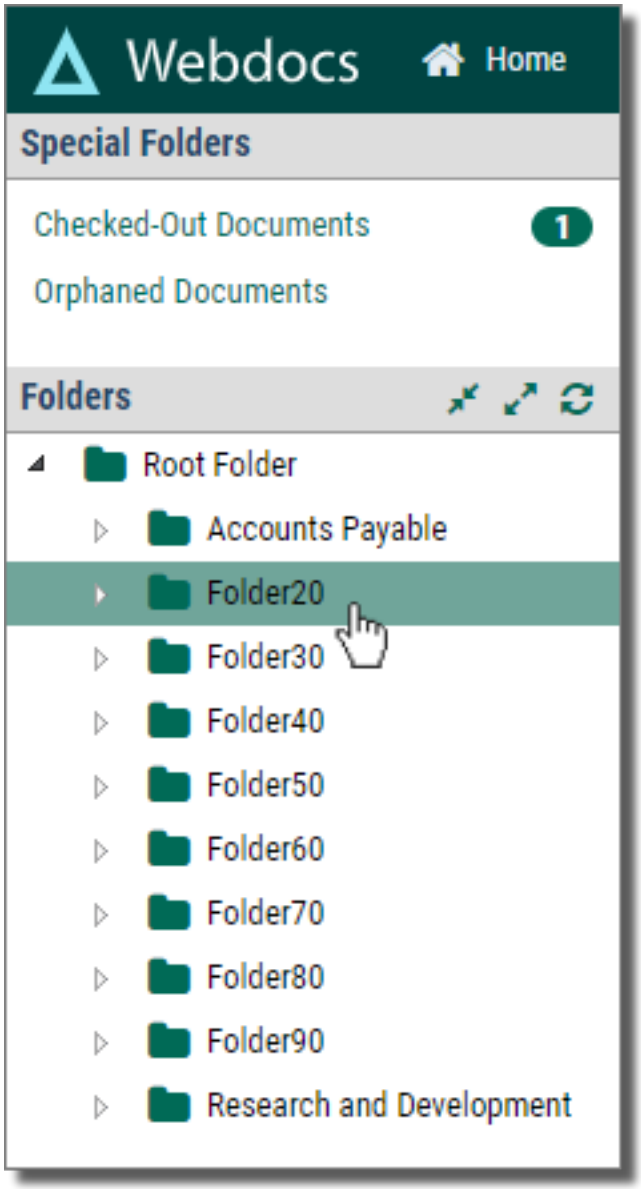
5. Click **Save** Save .

   A confirmation message displays, and you are set up to receive email notifications when documents are added to this folder.

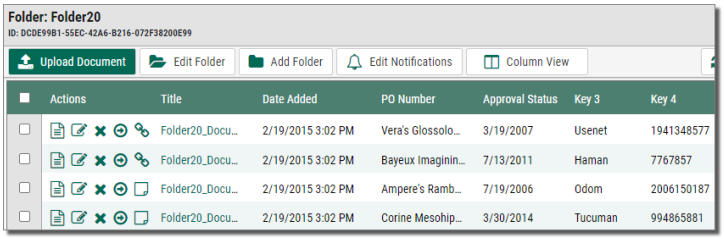
Changing a Folder Name

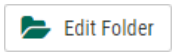
To change a folder's name:

1. On the side menu of the **Documents** tab, click the name of the folder to change.

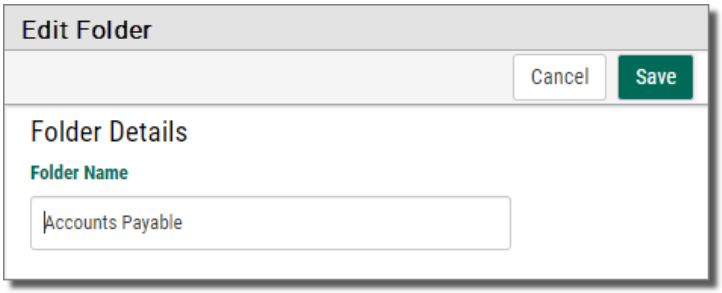


2. The contents of the folder display.



3. Click **Edit Folder**  .

   The Edit Folder page displays.



4. In **Folder Name**, type the folder's new name.
5. Click **Save** .

   The folder's new name displays, and the folder's name is changed.

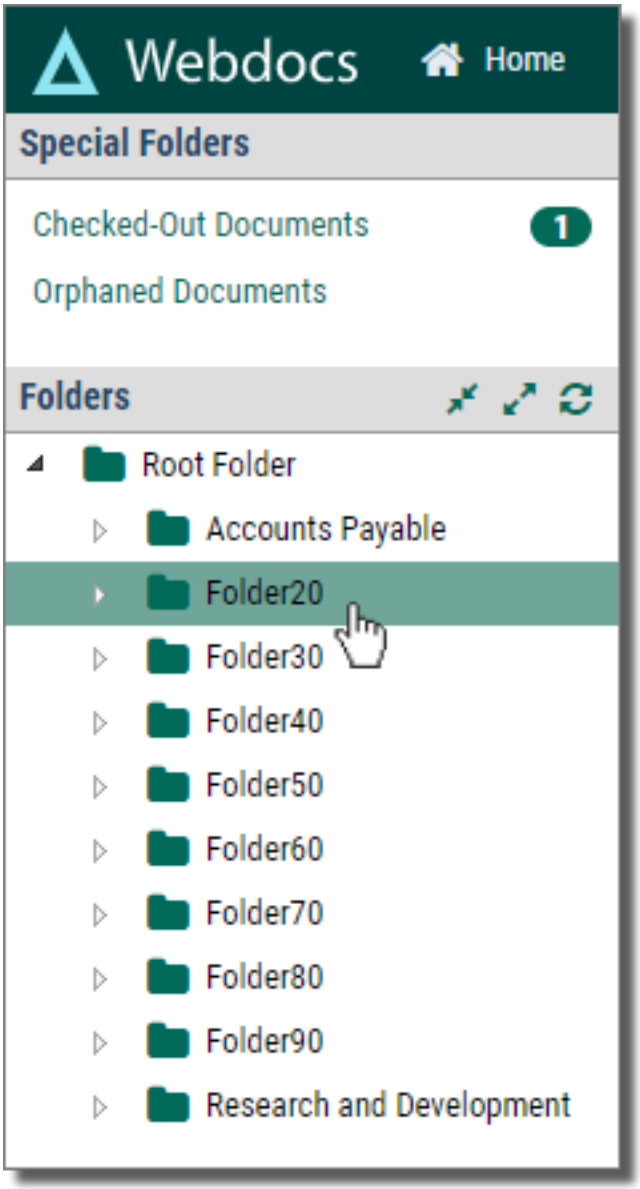
Deleting a Folder

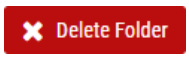
This topic shows you how to delete a folder from Webdocs.

> **NOTE:**
> You cannot delete a folder if there are documents in it or if it has one or more sub-folders.

To delete a folder:

1. On the side menu of the **Documents** tab, click the folder to delete.



2. The contents of the folder display.
3. Click **Delete Folder** 

.

> **NOTE:**
> You can only see **Delete Folder** when there are no documents in the folder.

The folder is deleted.

Managing Document Types

A Document Type is a category that contains different kinds of related documents that are used to complete a task or tasks. For basic information about Document Types and how to create Document Types, see Creating a Document Type and Planning for a Successful Set-Up.

This section shows you how to manage Document Types in the following ways:

Setting an Expiration Length

Setting Up User-Defined Fields

Creating a Search-Key Drop-Down List

Deleting a Document Type

Setting an Expiration Length

This topic shows you how to set an expiration length for documents of a Document Type. Expiration dates are optional. They can help you manage documents that have legal or other requirements for the length of time to archive.

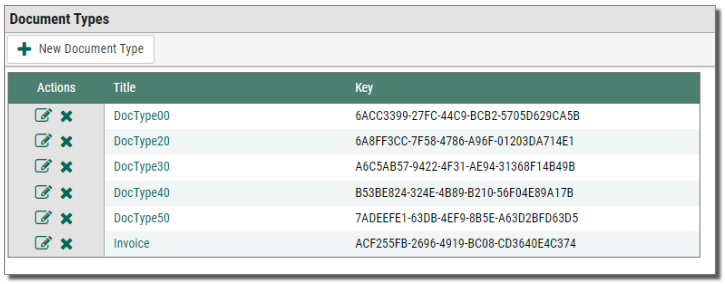
> **NOTE:**
> When you set an expiration length for documents of a Document Type, that expiration length only applies to documents of that Document Type that are added *after* you set the expiration length. It does not apply to documents of that Document Type that are already in Webdocs.

To set the expiration length for documents of a Document Type:

1. On the side menu of the **Settings** tab, click **Document Types**

.

   The Document Types page displays.



2. Next to the row of the Document Type to set an expiration length for, click the **Edit Document Type** .

   The Edit Document Type page displays.

3. In **Expiration Length**, type the number of days that you want all documents of this Document Type to expire after they have been added to the system.
4. Click **Save Document Type** Save Document Type .

   A message displays, telling you that the Document Type is saved, and now all documents of this Document Type expire after the number of days you chose in step 3.

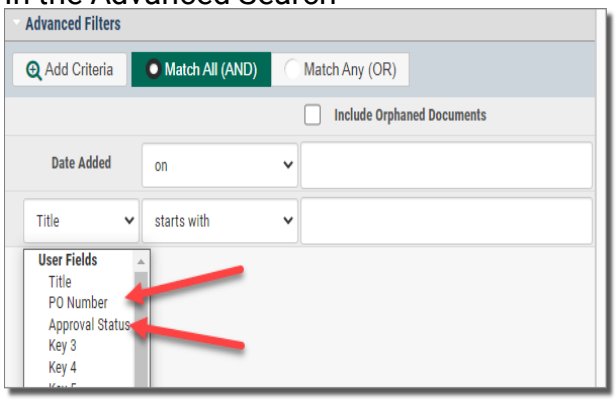
Setting Up User-Defined Fields

User-defined fields are labels for search keys that display:

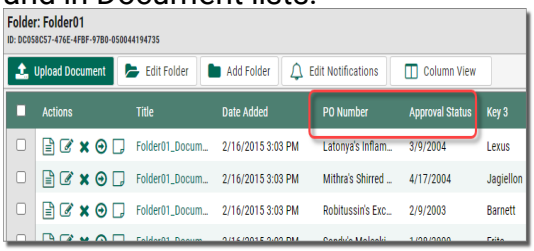
- In Basic Search and Key Search when searching for documents across Document Types.
- In the header rows for document folders.

For example: If you set up user-defined fields for Key 1 as *PO Number* and Key 3 as *Approval Process*, those fields display:

In the Advanced Search



and in Document lists.



User-defined fields are only visible when no Document Type is chosen; once a Document Type is chosen, then the field names for the Document Type display.

Before you name user-defined fields, choose a strategy:

- **Name user-defined fields with one name**. This way of naming user-defined fields is best if the search-key labels across Document Types are the same or similar.

  For example: Acme Co. has two Document Types: AP and AR. The first search key for both Document Types is *Invoice Number*. So, Acme Co.'s Webdocs administrator names the first user-defined field *Invoice Number*.

- **Name user-defined fields with more than one name.** This way of naming user-defined fields is best if you only have a few Document Types and the search-key names for all of your Document Types are different.

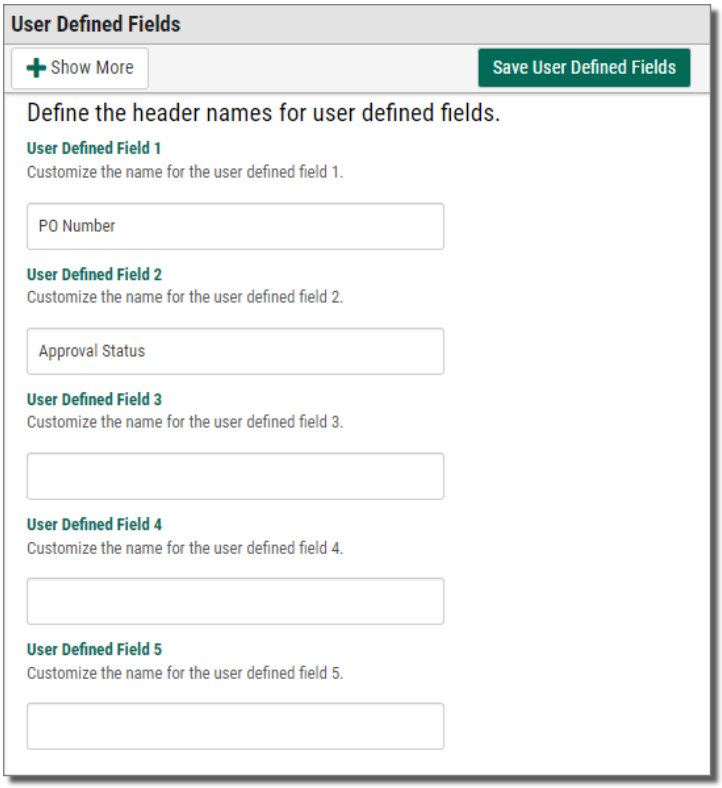
  For example: Acme Co.'s third search key is *Vendor Number* for AP and *Customer Number* for AR, so Acme Co.'s Webdocs administrator names the third user-defined field *Vendor/Customer Number*.

To name user-defined fields:

1. On the side menu of the **Settings** tab, click **User Defined Fields**

.

   The User Defined Fields page displays.



2. In the **User Defined Field** text boxes, type the names for as many user-defined fields as you want to name.
3. Click **Save User Defined Fields**

.

   A message displays, telling you that the user-defined fields are saved.

Creating a Search-Key Drop-Down List

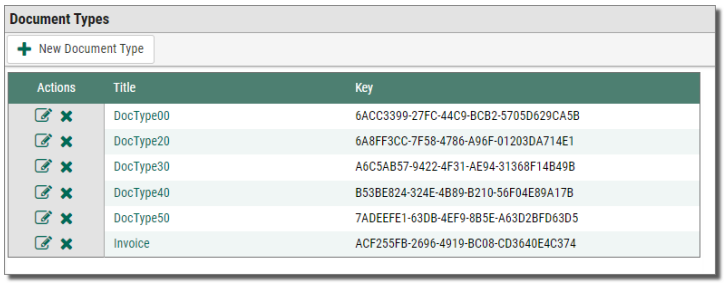
This topic shows you how to create a drop-down list for when users enter values in a search key.

To create a search-key drop-down list:

1. On the side menu of the **Settings** tab, click **Document Types**

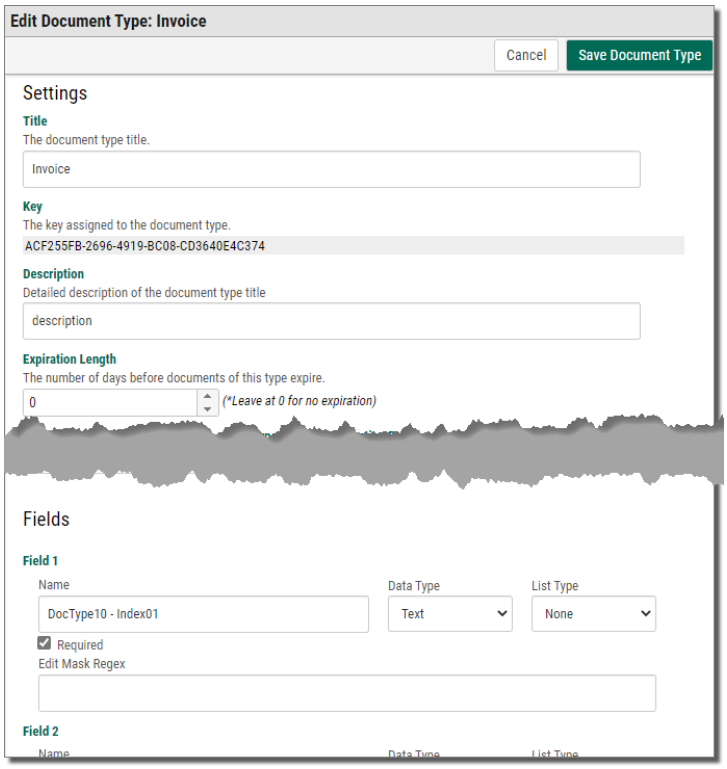
.

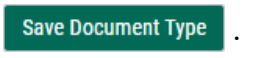
   The Document Types page displays.



2. Next to the row of the Document Type that you want to create a drop-down list for, click **Edit Document Type** .

   The Edit Document Type page displays.



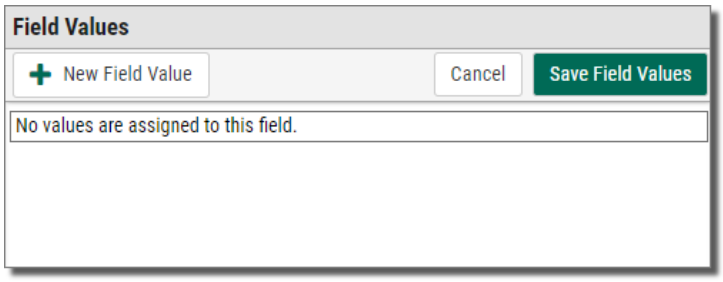
3. For the search key to create a drop-down list for, click **List Type** and choose either:
   - **Required** - only a drop-down list will display for this search key.
   - **Optional**- the user can choose between a drop-down list or text box.
4. Click **Save Document Type** 

.

A message displays, telling you that the Document Type is saved, and **Edit Field Values** Edit Field Values displays next to the search key so you can add drop-down list items.

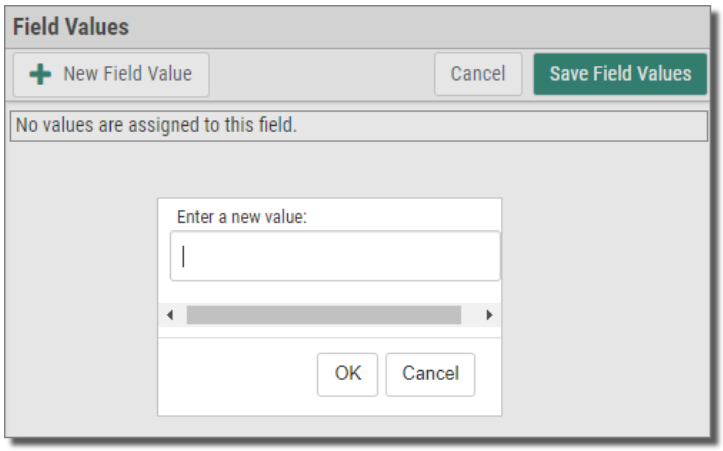
5. Click **Edit Field Values** Edit Field Values for the search key.

   The Field Values page displays.

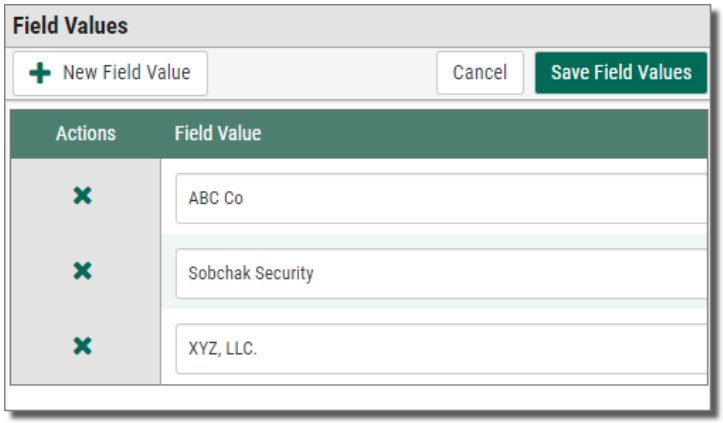


6. Click **New Field Value** New Field Value .

   A Field Value text box displays.



7. Continue clicking **New Field Value** New Field Value to add more choices to the drop-down list.



8. Click **Save Field Values** Save Field Values .

   A message displays, telling you that the field values are saved, and the drop-down list for the search key is created.

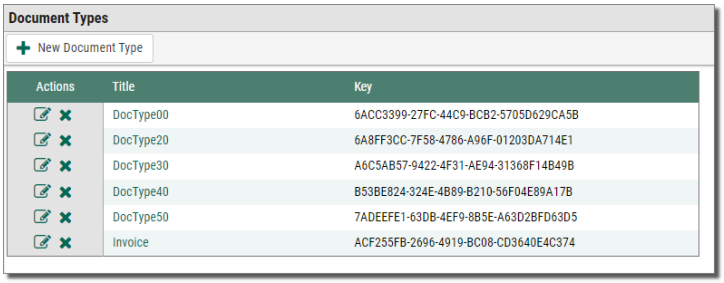
Deleting a Document Type

You should only delete a Document Type if that Document Type is not being used and there are no documents with that Document Type in Webdocs.

To delete a Document Type:

1. On the side menu of the **Settings** tab, click **Document Types** Document Types .

   The Document Types page displays.



2. Next to the row of the Document Type to delete, click **Delete Document Type** .

   A confirmation dialog box displays.

3. Click **OK**.

   The Document Type is deleted.

Managing Permissions

Permissions are how you give users access to the folders and documents they need to do their work, while also keeping Webdocs secure. For basic information about permissions and how to assign permissions, see Assigning Permissions and Planning for a Successful Set-Up.

This section shows you how to manage permissions in the following ways:

Assigning Advanced Permissions - Because permissions are how you maintain security in Webdocs, please read this topic in its entirety.

Assigning Advanced Permissions

In the Assigning Permissions chapter, you learned about the eight permissions and the three ways you can set those permissions: **allow** , **deny** , and **unspecified** . You also learned the most basic way to assign permissions: by assigning permissions to a folder for a group. This chapter shows more advanced ways to manage Webdocs document security by assigning advanced permissions.

This topic is divided into the following:

Advanced Permissions

Combining Permissions

Examples of Combined Permissions

Advanced Permissions

Each permission has two parts: a *who* part and a *what* part.

- The *who* part is who has that permission. *Who* can be either:

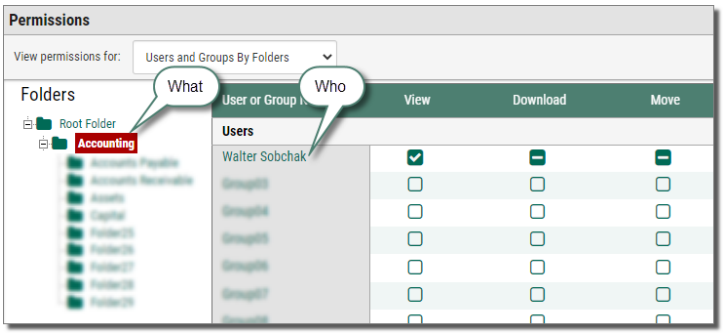
  A **Group** - All members of the group have the same permissions.

  A **User** - The user has individual permissions.
- The *what* part is what the group or user has access to. *What*can be either:

  A **Folder** - A group or user has the permission for all documents in that folder.

  A **Document Type** - A group or user has the permission for all documents of that Document Type.

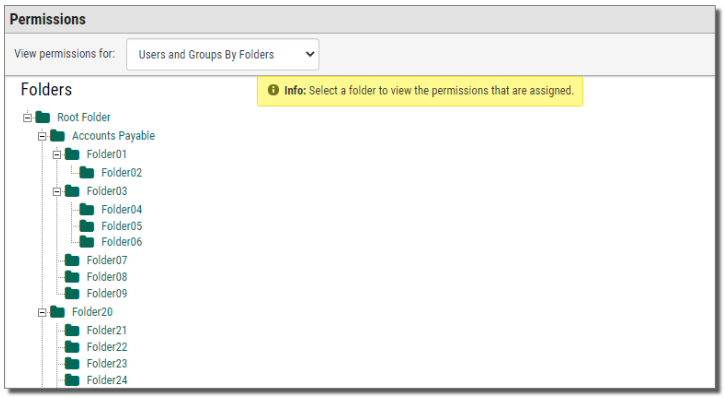
For example: In the image below, the *who* is Walter and the *what* is the Accounting folder:



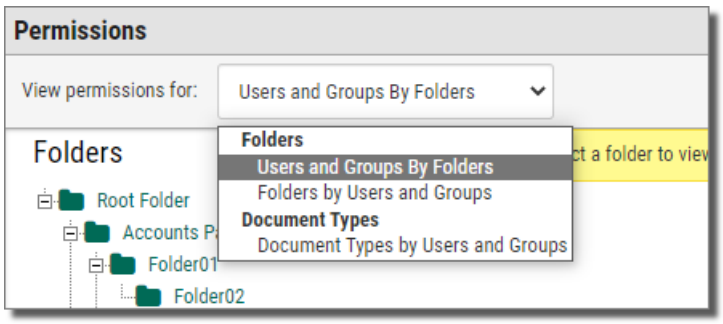
To assign these permissions:

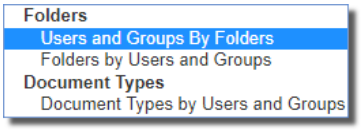
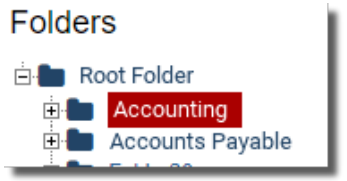
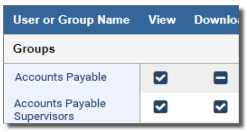
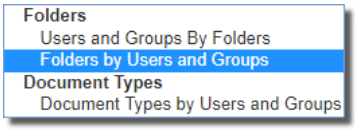
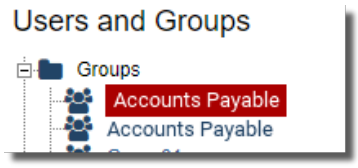
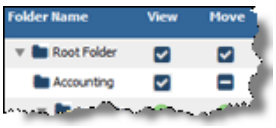
1. On the side menu of the **Settings** tab, click **Permissions** Permissions .

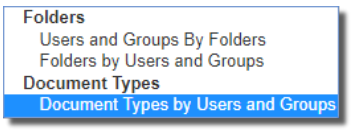
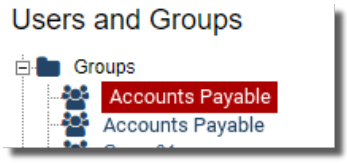
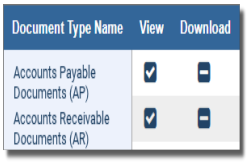
   Permissions displays.



2. In the **View permissions for** drop-down list:



To...	Choose...	Then click...	Then set permissions...
Assign group and user permissions to folders	Users and Groups by Folders 	The folder to set permissions for 	For all groups and users for that folder 
	Folders by Users and Groups 	The group or user to set permissions for 	For all folders for that group or user 

To...	Choose...	Then click...	Then set permissions...
Assign group and user permissions to Document Types	Document Types by Users and Groups 	The group or user to set permissions for 	For all Document Types for that group or user 

Combining Permissions

When you assign permissions to either both *who* parts or both *what* parts, you are combining permissions. So you can assign a permission both to:

- A group and a user who is in that group.
- A folder and a Document Type that has documents in that folder.

When you combine permissions, the following rules apply:

- If a permission is **denied** ⛔ *anywhere*, the permission is **denied** ⛔.
- If a permission is **unspecified** ☐ *everywhere*, the permission is **denied** ⛔.
- If a permission is **allowed** ☑ once and **allowed** ☑ or **unspecified** ☐ everywhere else, the permission is **allowed** ☑.

See the examples below for how to make combined permissions work together.

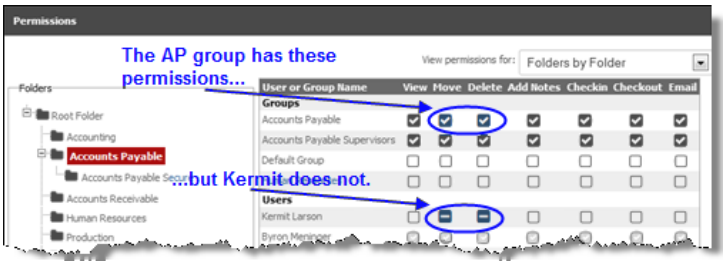
Examples of Combined Permissions

The following examples show some of the ways permissions can be combined to secure documents.

Example 1: Denying a User a Permission that the Group is Allowed

At Acme Co., the Accounts Payable group is allowed all seven permissions to the Accounts Payable folder. Acme Co. hires a new AP employee, Kermit Larson, so Acme Co's Webdocs administrator adds Kermit to the Accounts Payable group. However, until Kermit receives training, the administrator doesn't want Kermit to be able to move or delete documents.

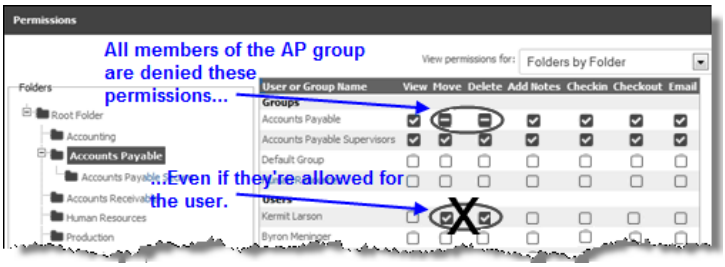
So the administrator denies Kermit the move and delete permissions on the user level:



Example 2: Guaranteeing that a User Doesn't Have More Permissions than the Group

Because a permission is denied if it is denied *anywhere*, Webdocs automatically secures documents so that a user doesn't have permissions that the group is denied.

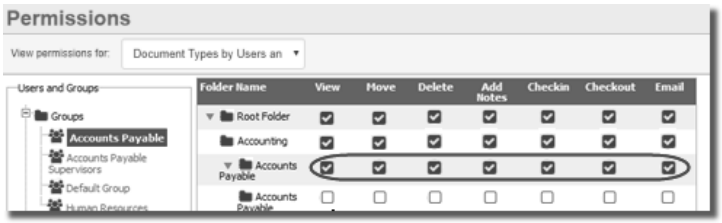
If Kermit is in the Accounts Payable group:



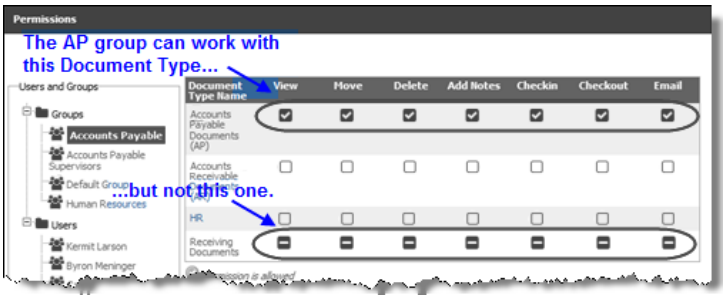
Example 3: Denying Permissions to a Document Type that the Folder Allows

Acme Co. stores two different Document Types in the Accounts Payable folder: general AP Documents and Receiving Documents. Acme Co.'s administrator wants the Accounts Payable group to have all seven permissions for the general AP Documents but wants to *deny* these permissions for the Receiving Documents.

So the administrator gives the AP group these permissions to the Accounts Payable folder:



...And these permissions for the two Document Types in the Accounts Payable folder:



Using Full-Text Indexing

Full-text indexing lets you search based on words and phrases in the documents themselves, not just the title and search keys.

Webdocs uses OCR (Optical Character Recognition) to turn the contents of all your documents into text files. Those text files are indexed by a database optimized for full-text searching.

When you first turn on full-text indexing, a program runs that indexes each document in your system. This initial indexing can take some time. As new documents are added, they are indexed and added to the index database.

Don't use full-text indexing if:

- You are concerned about file space. The full-text index database is often quite large.
- You don't need to search on anything other than the title and search keys.

To turn on full-text indexing, see Full-text Indexing and Search.

Warning: To use full text indexing on PDF files, Adobe Reader Version 9.5 is the highest version of Adobe Reader that can be installed on the Webdocs server.

If you have a problem with the index or have just removed many documents, you may want to rebuild the index:

1. On the side menu of the **Settings** tab, click **General Settings**

.
2. Check **Reset Full Text Indexing**.
3. Click **Save Settings**

.

   It may take some time to rebuild the index. Once the indexing is complete, the check-box for **Reset Full Text Indexing** will be empty again.

Using the Webdocs Route Designer

The Webdocs Route Designer is a program you can use to create approval routes for documents that need to move within your organization from employee to employee. Webdocs Route Designer is part of the Webdocs installer and can be installed on any system you will use to manage routing.

When you create routes in the Webdocs Route Designer, the documents themselves remain in Webdocs. Webdocs users who are assigned to a route step can view, work with, approve, or reject a document—all from the Webdocs interface.

If a user has a document that is waiting for their review, a link to their routing inbox will display on their home page. The user will also see that a document is waiting for them in their routing inbox on the Document tab.

Users who are assigned to a route step can:

- View a document from their routing inbox.
- Review the document's information, like its title, Document Type, and search keys.
- Approve the document and send it to the next step on its route.
- Reject the document.
- Send a note with an approval or a rejection.
- Transfer the document to another route.
- Complete the document route.

This section takes you through the steps to create and manage a route:

Logging In to the Webdocs Route Designer

Designing a Route

Creating a Route

Adding Steps to a Route

Setting Up the Properties of Each Step

Managing a Document Route

Logging In to the Webdocs Route Designer

This topic shows you how to log in to the Webdocs Route Designer. Logging in:

- Opens the Webdocs Route Designer so you can set up and design a route.
- Connects you to the Webdocs database so you have access to Webdocs users when you set up and design the route.

> **NOTE:**
> If you are running Webdocs - Windows Edition version 1.5.0 or higher, you do not have to do any configuration before logging in to the Webdocs Route Designer. If you are running an older version of Webdocs, you may need to define your Microsoft SQL Server information in the DSN (data source name) settings before you can log in to the Webdocs Route Designer.

To log in to the Webdocs Route Designer:

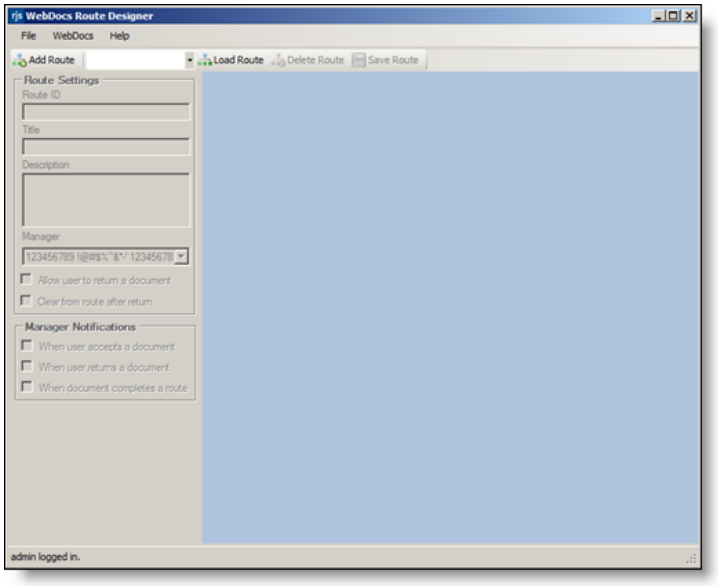
1. On the Webdocs server, click **Start \ All Programs \ RJS Software \ Webdocs - Windows Edition \ Webdocs Route Designer**.

   The Webdocs Route Designer opens, but you are not logged in.
2. **Webdocs**, choose Log In

   Webdocs Login displays.

3. In **User ID**, type your Webdocs user name.
3. In **Password**, type your Webdocs password.
4. Click **Log In**.

You are logged in to the Route Designer.



Designing a Route

You draw the route for documents to follow, like a flow chart. Boxes represent each step, and arrows show the direction of flow.

The four things to know about drawing a route are:

1. The route can begin with only one step. In other words, it must have a single entry point.
2. The route can end with only one step. In other words, it must have a single exit point.
3. Draw the flow of the route from the top down rather than from left to right.
4. If a user has a choice between two route steps, the route step that you draw higher in the designer is the one that the user sees as the first choice.

This section shows you how to create the steps of a document by following these steps:

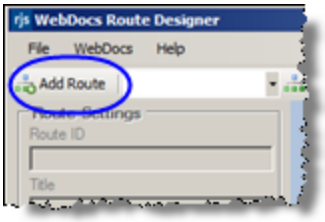
1. Creating a Route
2. Adding Steps to a Route
3. Setting Up the Properties of Each Step

Creating a Route

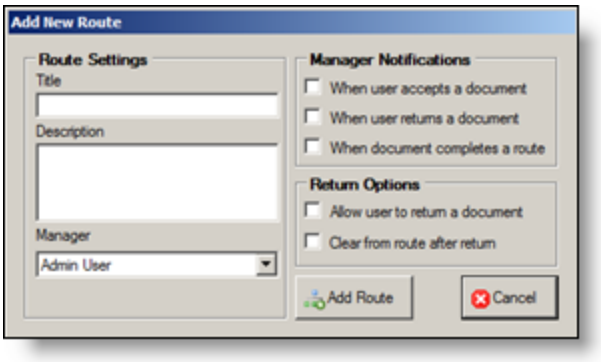
This topic shows you how to set up a new document route.

To set up a document route:

1. In the Webdocs Route Designer, click **Add Route**.



   Add New Route displays.

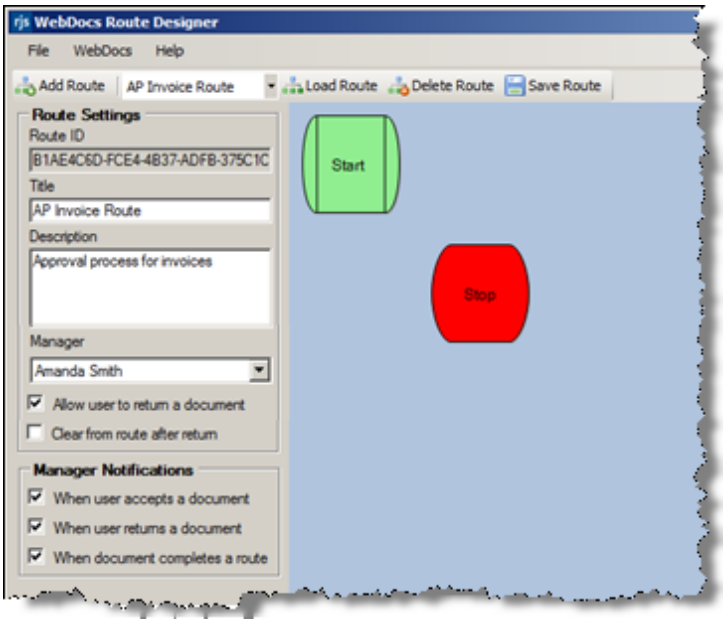


2. In **Title**, type the name of the new route.
3. (Optional) In **Description**, type a description of this route.
4. In **Manager**, choose the route manager.

   A route manager is the Webdocs user who is notified when a document is approved or rejected or when a route is completed. A route manager can be any Webdocs user who has an email address in Webdocs. You must also select one of the manager-notification options to choose when the route manager is notified.
5. In **Manager Notification Options**, choose one or more options for when the manager receives an automatic email:
   - When a user accepts a document.
   - When a user rejects a document.
   - When a document completes a route.
6. In **Return Options**, choose what happens when a Webdocs user returns a document:
   - **Allow user to return a document**– send the document back to the previous step for correction.
   - **Clear from route after return**– remove the document from the route.
7. Click **Add Route**

.

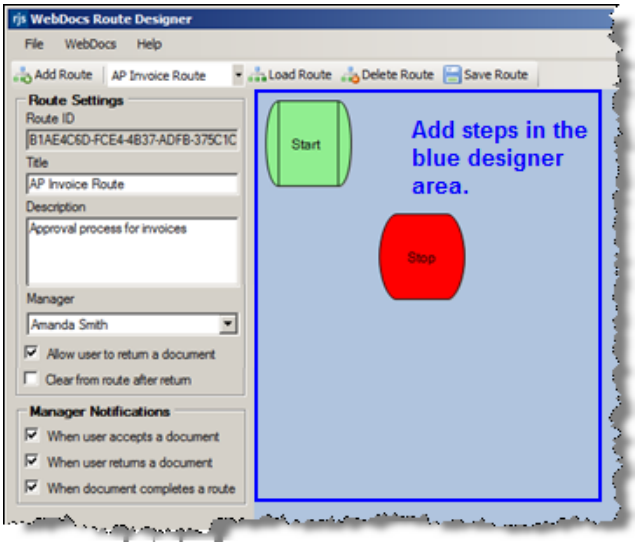
   The route is set up and displays.

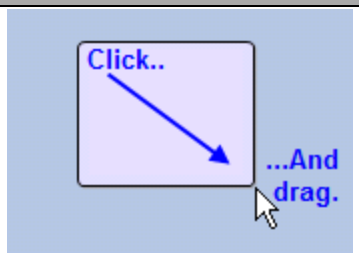
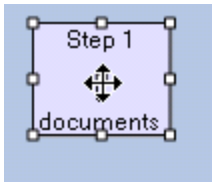
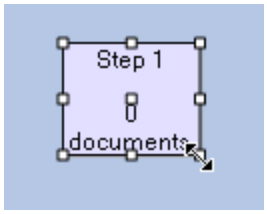
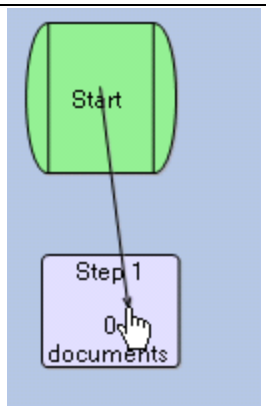


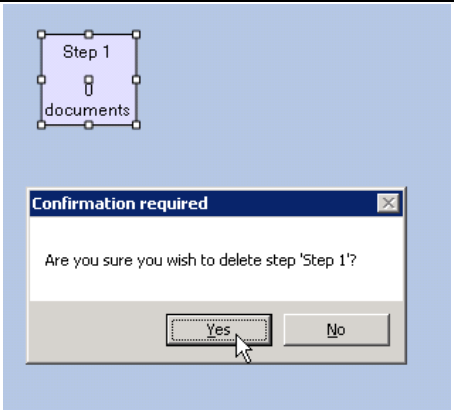
8. Continue to Adding Steps to a Route.

Adding Steps to a Route

This topic shows you how to add steps to the route you created. Each step represents an approval decision for a document on a route. You add steps by drawing in the blue designer area.



To...	Do the following...	And it looks like this...
Add a step.	Click where you want the top-left of the step to be and drag to the bottom-right.	
Move a step.	1. Click the step to select it. 2. Move the cursor to the center of step until it turns into directional arrows. 3. Click and drag the step to where you want to move it.	
Resize a step.	1. Click the step to select it. 2. Put your cursor over the sizing handles until the cursor turns into an arrow. 3. Click and drag the step to make it bigger or smaller.	
Connect two steps.	1. Click the first step to create an arrow. 2. Drag the arrow to the next step. 3. Let go and the steps are connected.	

To...	Do the following...	And it looks like this...
Delete a step.	1. Click the step to select it. 2. Press Delete. A confirmation dialog box displays. 3. Click Yes to confirm.	

To set up what each step does, continue to Setting Up the Properties of Each Step.

Setting up the Properties of Each Step

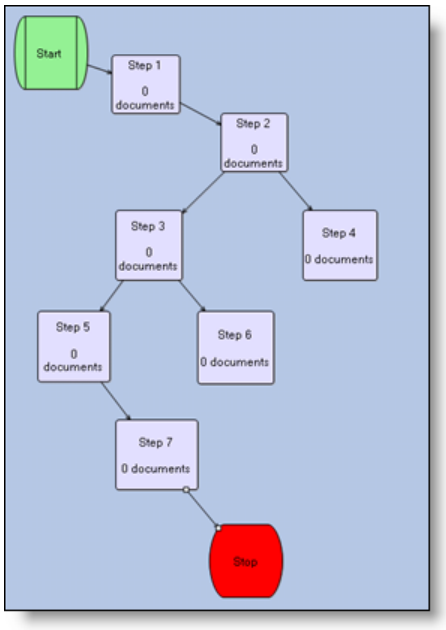
Now that you've added steps to the route, choose what each step does. To set up what each step does, edit the step's properties.

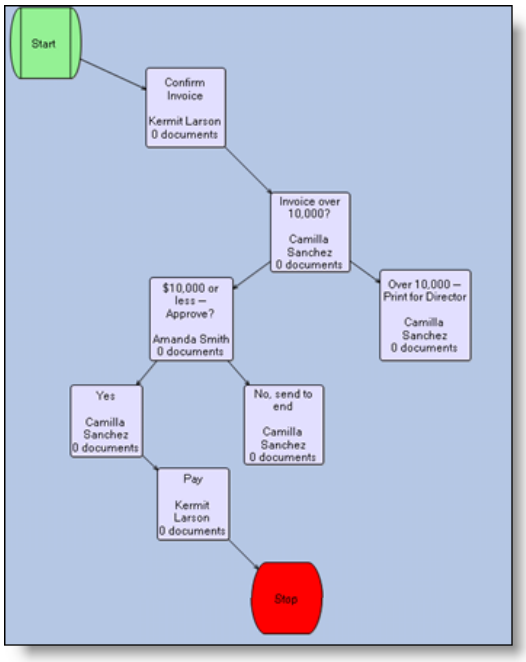
For each step:

- Choose the step's title.
- Assign one or more Webdocs users to the step.
- Set how long a document can sit in a routing inbox before action is taken.
- Choose the step's actions. Actions include notifying the route manager, moving the document to the previous step, or moving the document to the next step.

For example: This is how a sample route looks before and after you set up its properties:

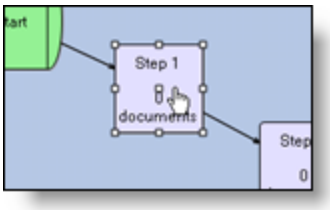
Before... **After...**



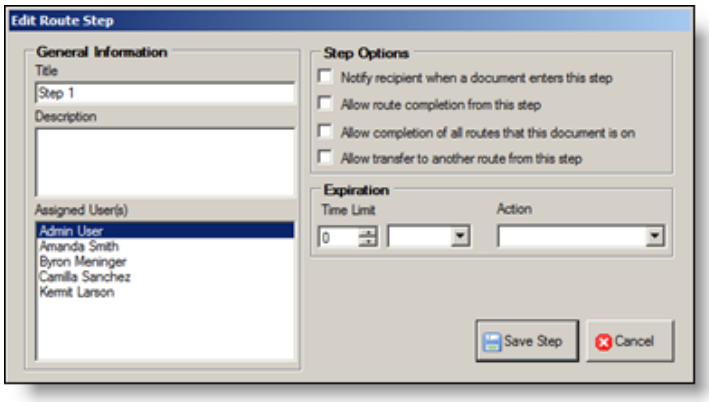


To set properties for a route step:

1. In the blue designer area, double-click the step whose properties you want to set up.



Edit Route Step displays.



2. Set up the step's properties based on the following:

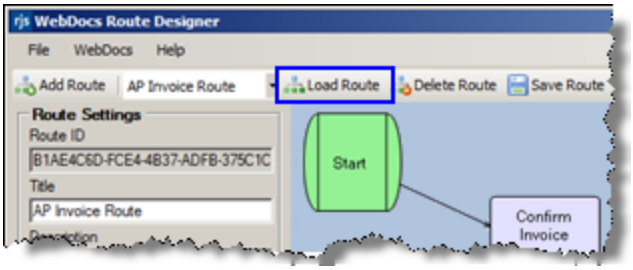
<table>
<tr><th>For...</th><th>Choose...</th></tr>
<tr><td>Title</td><td>The name of this step.</td></tr>
<tr><td>Description</td><td>Any notes for yourself and other administrators. The description is only visible from the Webdocs Route Designer.
For example: This is a yes/no step.</td></tr>
<tr><td>Recipient</td><td>The person or people responsible for this step. You can choose any users with email addresses in Webdocs. Hold Shiftand click to select multiple adjacent users, and holdCtrl and click to select multiple non-adjacent users.</td></tr>
<tr><td>Step Options</td><td>What the recipients can do with a document:
Notify recipient when a document enters this step–receive an email notification when a new document arrives in their routing inbox.
Allow route completion– send the document to the end of the route.
Allow completion of all – send the document to the end of all the routes it is on.
Allow transfer–transfer the document to a different route.</td></tr>
<tr><td>Expiration</td><td>How long a document waits in the recipient's routing inbox before an automatic action happens:<table><tr><td>For...</td><td>Choose...</td></tr><tr><td>Time Limit</td><td>When to set the expiration date for a document in a routing inbox. How long a document waits in a routing inbox.</td></tr><tr><td>Action</td><td>Webdocs does not currently use this setting.</td></tr></table></td></tr>
</table>

3. Click **Save Step**

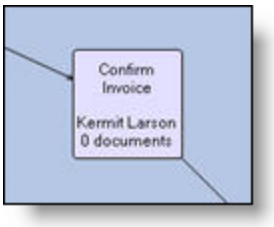
.

   Edit Route Step closes, and the properties of the route step are set up.

4. To see how your changes have affected the route, click **Load Route.**



   The changes you made to the route display.



5. After you are done setting up the properties for each step, click **Save Route**.

   The route is saved, and you can now assign documents to this approval route.

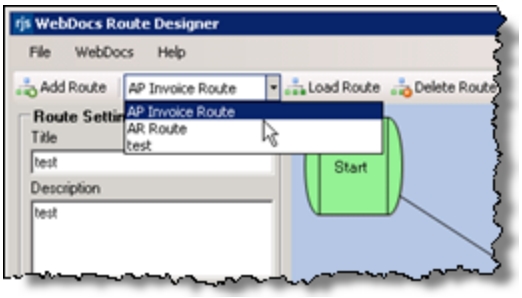
Managing a Route

This topic shows you how to manage a route. Usually, the Webdocs Route Designer uses email notifications for individual steps in a route to manage the route. But sometimes you may need to open a route to manage it.

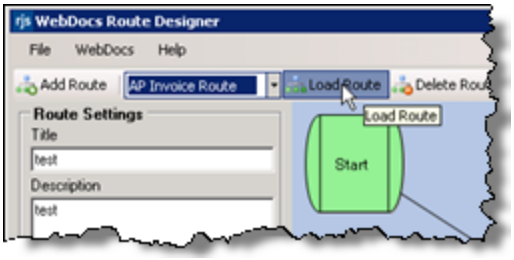
To open and manage a route:

1. Log in to the Webdocs Route Designer.

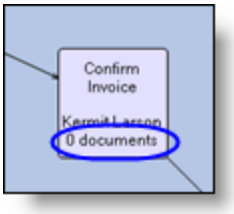
   The Webdocs Route Designer displays.
2. Choose the route to view from the drop-down list.



3. Click **Load Route** to open the route.



4. Manage the route:

To...	Follow these steps...
Edit the route.	To: • Add a new step to the route, see Adding Steps to a Route. • Edit an existing step, see Setting Up the Properties of Each Step.
View document activity in the route.	At the bottom of each step, the number of documents in that step displays: 
Delete the route.	1. Click **Delete Route**. A confirmation dialog box displays. 2. Click **Yes**. The route is deleted.

Appendix

The following appendices provide supplemental information for Webdocs administrators:

Appendix A: Setting Up Other Applications with Webdocs

Appendix B: Customizing Webdocs with Exit Points

Appendix C: Setting Up a Maintenance Plan

Setting Up Other Applications with Webdocs

This topic gives you an overview of the different applications you can set up for users to add documents to Webdocs or work with documents already in Webdocs.

For more information about how to capture documents or integrate Webdocs with other applications, contact Fortra.

TIP:

- Tell the users which other applications are on their computers and refer them to the user instructions listed below.
- Make sure that users know the URL for Webdocs.

To set up users to...	Use...
Scan and add documents to Webdocs occasionally. For example: 10 or fewer documents a few times a day.	Webdocs Tray Capture • For installation, licensing, set-up, and user instructions, see http://support.rjssoftware.com/product/.
Scan and add many documents to Webdocs.	RJS Imaging Scan Workstation • For installation, licensing, set-up, and user instructions, see http://support.rjssoftware.com/product/imaging-scan-workstation.
Import batches of PC documents to Webdocs.	Batch Import Utility for Webdocs • For installation, licensing, set-up, and user instructions, see http://support.rjssoftware.com/product/.

To set up users to...	Use...
Work with Webdocs documents from within Microsoft Office applications.	Webdocs Microsoft Office Add-Ins • For installation,set-up, and user instructions, see http://support.rjssoftware.com/product/webdocs-microsoft-office-add-ins.
Work with TIFF and PDF files in Webdocs.	RJS Imaging Client • For installation, licensing, set-up, and user instructions, see http://support.rjssoftware.com/product/imaging-client.

Customizing Webdocs With REST Events

This gives you an overview of how to use custom code to integrate with Webdocs. The scope of the custom code can be as large or small as your organization needs. Some common uses of custom code include:

- Automating manual tasks.
- Integrating with other programs or databases to import data to Webdocs or to receive data from Webdocs.
- Automatically updating similar documents when one document is updated.
- Validating search-key entry and rejecting any document whose validation fails.
- Notifying non-Webdocs users, like managers, when important documents are changed.
- Much more.

REST Events

There are ten places in Webdocs that can integrate with custom code. These places are called events. The supported events are:

- Pre Checkin - Before a new document is added to Webdocs.
  - Can deny the checkin if custom rules are not met
  - Can populate keys from database lookups
- Post Checkin - After a new document is added to Webdocs.
  - Cannot deny the checkin

- Pre Update - Before a document's metadata is updated in Webdocs.
  - Can deny the update if custom rules are not met
  - can populate keys from database lookups
- Post Update - After a document's metadata is updated in Webdocs.
  - Cannot deny the update
- Route Step Advancing - Before a document in a route is advanced to the next step.
  - Can block the advancement if custom rules are not met
- Route Step Advanced - After a document in a route is advanced to the next step.
  - Cannot block the advancement of the route
- Route Completed - After a document reaches the end of a route.
- Route Rejected - After a document is rejected on a route.
- Pre Move - Before a document is moved to a new folder
  - Can block the move if custom rules are not met
- Post Move - After a document is moved to a new folder
  - Cannot block the move

Depending upon what you need Webdocs to do, you might only need to utilize a single event. Write as little custom code as necessary to meet your needs.

Writing the Custom Code

To customize Webdocs at one or more of its events, someone has to write the custom code in the in their programming language of choice that can listen for a REST call. A sample application is provided with the Webdocs installation folder in C# to get you started.

If you need to customize Webdocs and you do not have a programmer at your organization or you require assistance with this feature please contact Fortra for

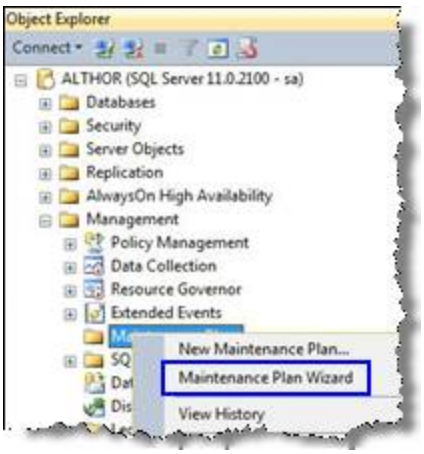
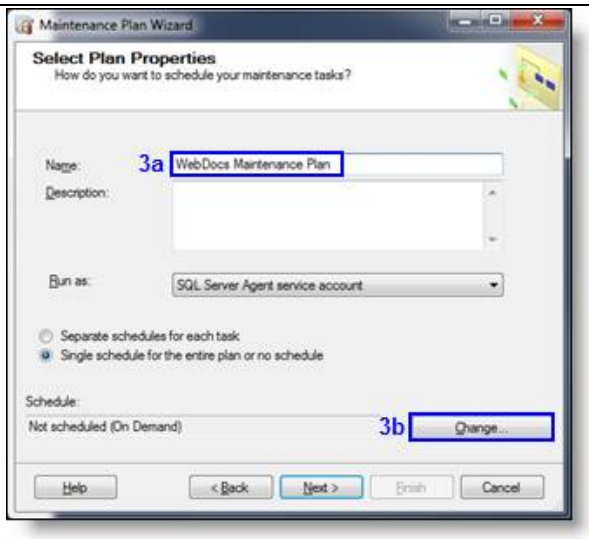
Setting Up a Maintenance Plan

If you are checking in a high volume or backlog of documents to Webdocs, the indexes Microsoft SQL Server uses to look up documents may become fragmented. Fragmented indexes decrease database performance and slow down searches. To improve database performance, you need to reorganize the indexes.

This appendix shows you how to set up a maintenance plan in Microsoft SQL Server Management Studio to regularly reorganize the indexes.

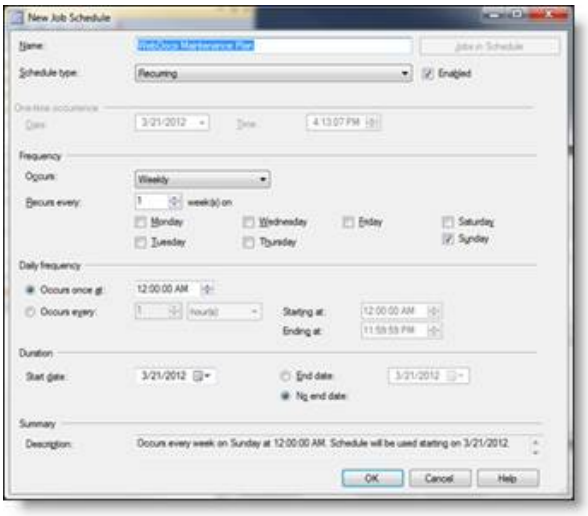
> **NOTE:**
> Depending on your version of Microsoft SQL Server Management Studio, some screens may look different.

To create a maintenance plan for Webdocs for Windows:

1. Open Microsoft SQL Server Management Studio and log in to the SQL Server instance for the Webdocs database.	
2. Run the Maintenance Plan Wizard: a. In Object Explorer to the left, expand **Management**. b. Right-click **Maintenance Plans** and choose **Maintenance Plan Wizard**. The Maintenance Plan Wizard opens with Select Plan Properties showing.	
3. Choose the plan properties: a. In **Name**, type a name for the maintenance plan. b. Next to **Schedule**, click **Change**. New Job Schedule displays.	

c. Choose a schedule for this maintenance plan.

> **NOTE:**
> The higher the volume of documents checked in to Webdocs, the more often you should reorganize the indexes.



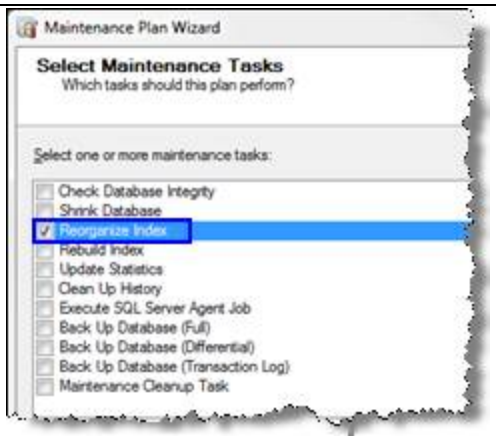
d. Click **OK**.

The schedule you chose displays in the **Schedule** field of the Maintenance Plan Wizard.

e. Click **Next**.

Select Maintenance Tasks displays.

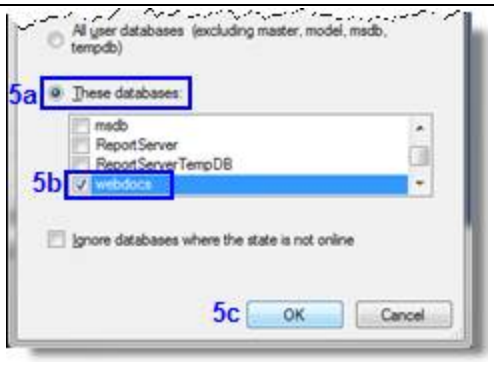
4. Set the maintenance plan to reorganize the index:
   a. Check **Reorganize Index**.
   b. Click **Next** twice until you get to Define Reorganize Index Task.



5. Choose to reorganize the Webdocs database.

In **Databases**:

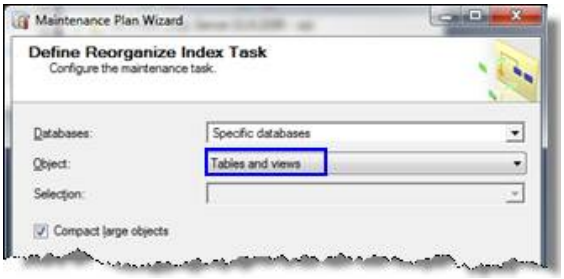
   a. Choose **These databases**.
   b. Check **webdocs**.
   c. Click **OK**.



d. In Define Reorganize Index Task, make sure **Object** is set to **Tables and Views**.

e. Click **Next**.

Select Report Options displays.



6. (Optional) In **Select Report Options**, choose how to receive reports on the maintenance plan and click **Next**.

Complete the Wizard displays.

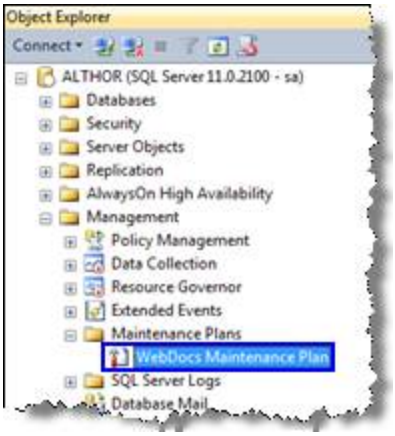
7. Finish creating the maintenance plan:

   a. Click **Finish**.

   The Maintenance Plan Wizard displays its progress.

   b. When the maintenance plan is successfully created, click **Close**.

   The maintenance plan displays in Maintenance Plans in Microsoft SQL Server Management Studio.



8. Scroll to the bottom of Object Explorer and make sure **SQL Server Agent** is started:
    - If there is a green arrow next to SQL Server Agent, it is started.
    - If there is a red X next to SQL Server Agent, right-click **SQL Server Agent** and click **Start**.

    > **NOTE:**
    > If you are connected to a remote SQL server, the red X and green arrow will not display and you cannot control SQL Server Agent.

The maintenance plan is now set up to reorganize the indexes on the schedule you chose in step 3a.

Key Link Field Types

The following is a list of available field typess to use in a Key Link when creating a new Document Type:

[Key1-Key30]

[CheckoutUserId]

[CurrentVersion]

[DocumentTypeId]

[ExpirationStatus]

[ExpireDate]

[FileExtension]

[FileName]

[FolderId]

[FullPath]

[FullTextStatus]

[HasNotes]

[Id]

[InsertDate]

[LastChangedDate]

[LastVerifiedDate]

[LocationId]

[NeedsFullTextIndex]

[NeedsKeyIndex]

[RelevanceScore]

[Title]

[DocumentTypeDefaultFlowKey]

[DocumentTypeDefaultErrorKey]

[DocumentTypeDaysToExpiration]

[DocumentTypeDaysToDelete]

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[DocumentTypeExpireAction]

[DocumentTypeExpireActionKey]

[DocumentTypeTitle]

[FolderTitle]

[ParentFolder]

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