citeck ecos

Powered by Alfresco ECM

Getting Started

2016

Contents

Intro

This guide describes the installation and configuration process of the Citeck EcoS system. It is also meant for users who want to learn more about the functionality of the system.

Terms and definitions.

Site – the working environment for the company's division with certain functionality and interface.

Role – the range of permission rights necessary for different functions. It is given to the group of users

Document Card – electronic document registration card, the range of system document details. Page, containing cardlets (Event history, Comments, Properties, Actions, etc.), which could be managed and moved.

Cardlets – sections of the document card page tab.

Tab – element of the document card page, consists of cardlets.

Document library (catalogue, repository) is a storage of electronic documents that organizes collective permission to the company's documents stored on the server. They could be edited and downloaded. There is also the history log for changes to the documents that were made.

Journals – the list of specific documents.

Workflow (business-process) – the set of sequential actions in accordance with a certain company's business process.

Tasks in progress – tasks that need to be performed.

Dashlet – the informational home page panel.

1. About the system.

The main purpose of the system is to manage crucial business flows and documents, to ensure the effective working relationships between managers and performers, as well as to enhance workflow efficiency.

Main features of the system:

Routes and workflows

Organizational structure and delegation. Permission rights. Organigram is the device for modeling and changing organizational structure. The key feature is to mark groups according to company's subdivisions and persons in charge. There is a function to assign permissions to certain groups or performers, as well as to assign tasks.

Document journals. The device for searching and viewing all kinds of documents and objects in the system. The key feature is displaying only relevant attributes for the specific type of content.

Life cycles. Convenient document life cycle description in the form of conditions and transitions. The life cycle component is easy to expand even after their launch. The basic workflows, such as approval and signing could be used as parts of the life cycle.

Document card. The document card could be composed from the different divisions (cardlets), by interchanging these cardlets or changing the way they are displayed.

Managing document metadata

Managing document versions

Efficient document search tool

Creating documents by the MS Word templates

Personal work space interface. Various visual components make the system easier to use.

Managing guides

Managing reports. Automatic data upload to the external database makes managing reports easier using third hand software.

Integration with other systems. Alfresco guides and journals could be synchronized with external sources. Such sources as SQL-compatible databases, XML-files, and basic files (to import the content) are supported. It is also possible to upload the info to external repositories.

Stream input and text recognition powered by Ephesoft.

Case management. Cases are special containers with arbitrary types of attachments.

Templates. Content templates are used to create document content according to a given template. Card templates create linked documents, such as approval lists, permission histories, etc. Notification templates control email notifications. Auto numeration templates generate documents indexes and numbers. DOCx (MS Word 2007) templates are also supported.

Extended processes options. The option to give out permissions automatically during the task performance, and to delete them after the task is complete. Attaching documents to the tasks.

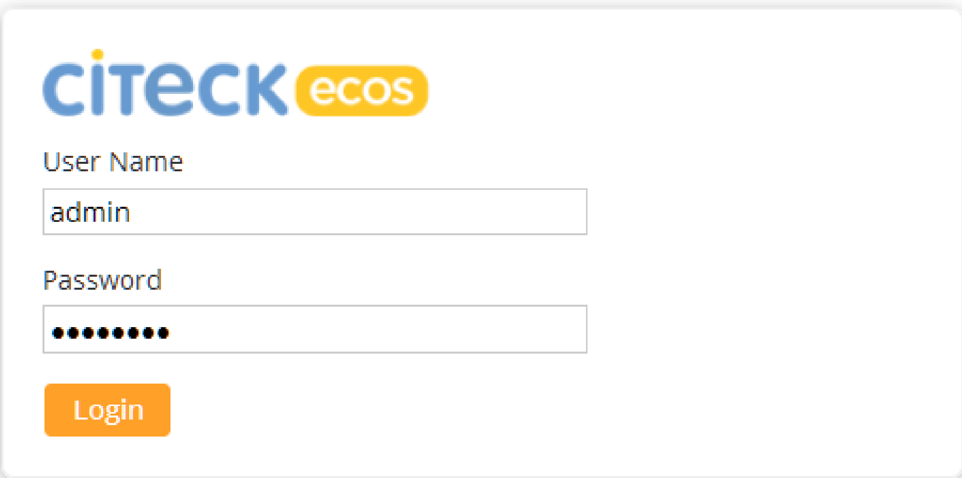
2. Getting started.

2.1. Logging into the system.

System modules' functionality and recourses are accessible through the single authorization process.

Access to the system is only allowed for the registered users. To log into the system, open the http://...[1] page in your browser, and enter the login and password into the correlating fields.

The user home page will then be opened.



The user page interface is divided into dashlets (info blocks).

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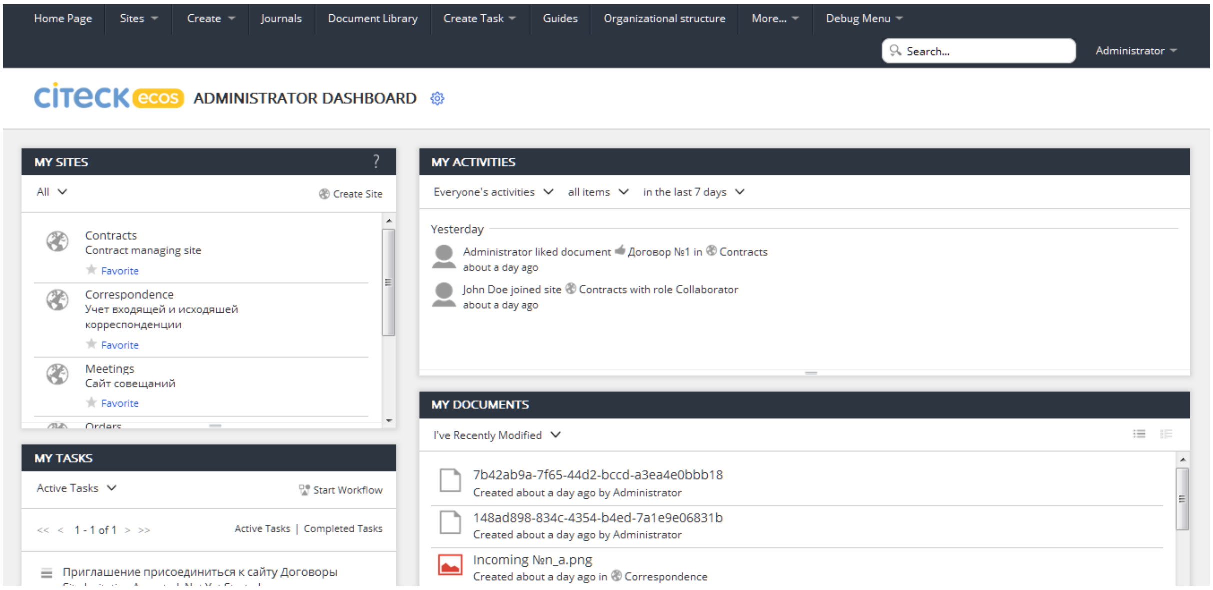
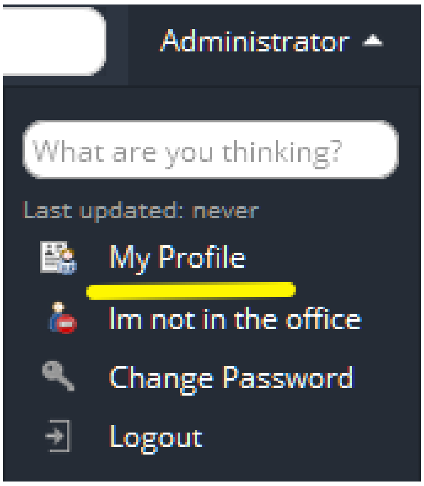
1 Default system adress http://127.0.0.1:8080/share



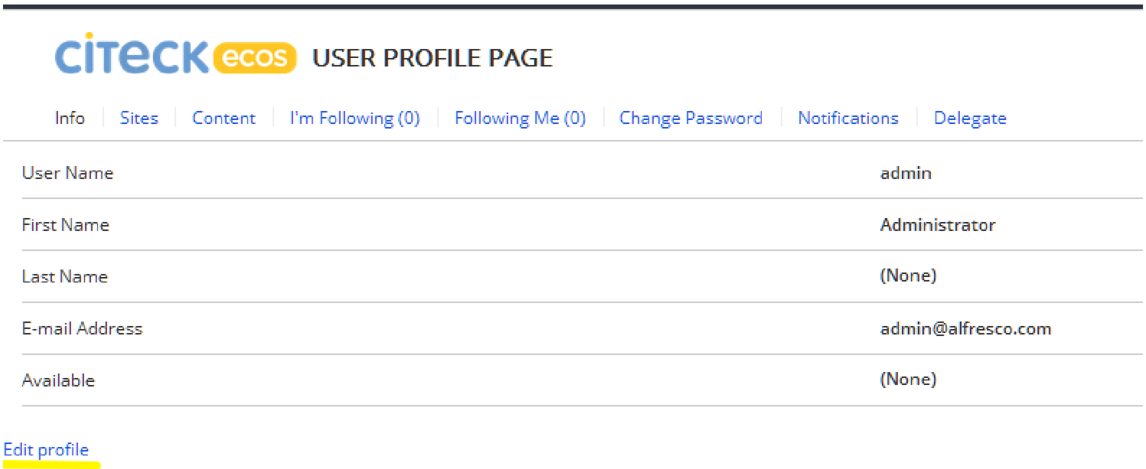
2.2. Editing user profile.

Actions to edit the **user profile**:

1. In **main menu** choose **My profile**.



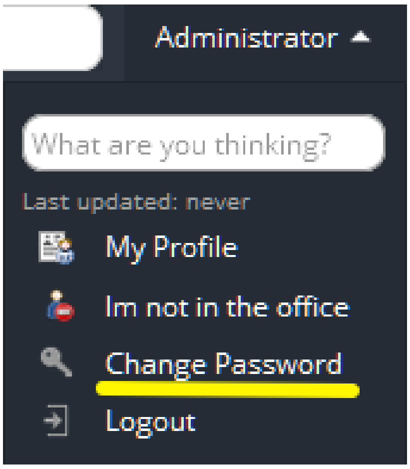
In **Information** tab there is user info. Press **Edit profile**.



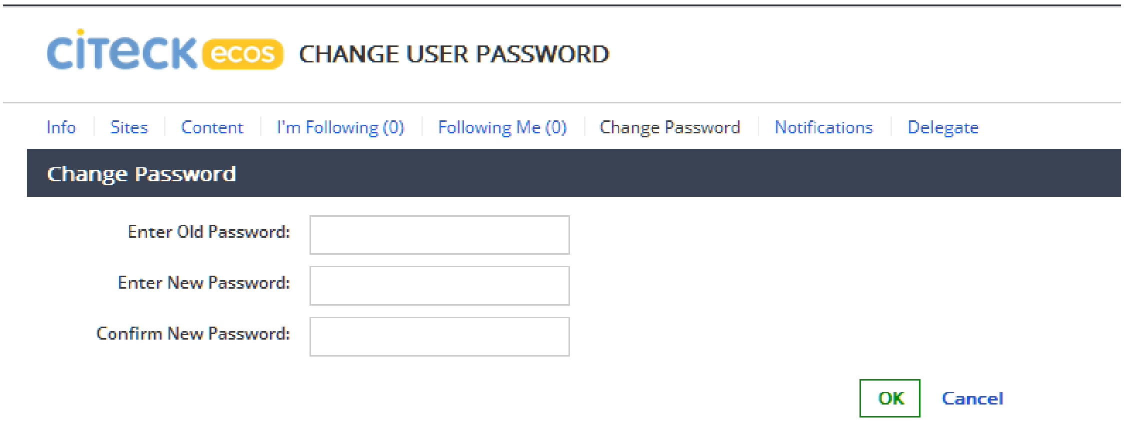
2. Make any necessary changes (the obligatory fields are marked with *), and press **Save** button.

2.3. Changing the user password.

In user menu choose **Change password**.



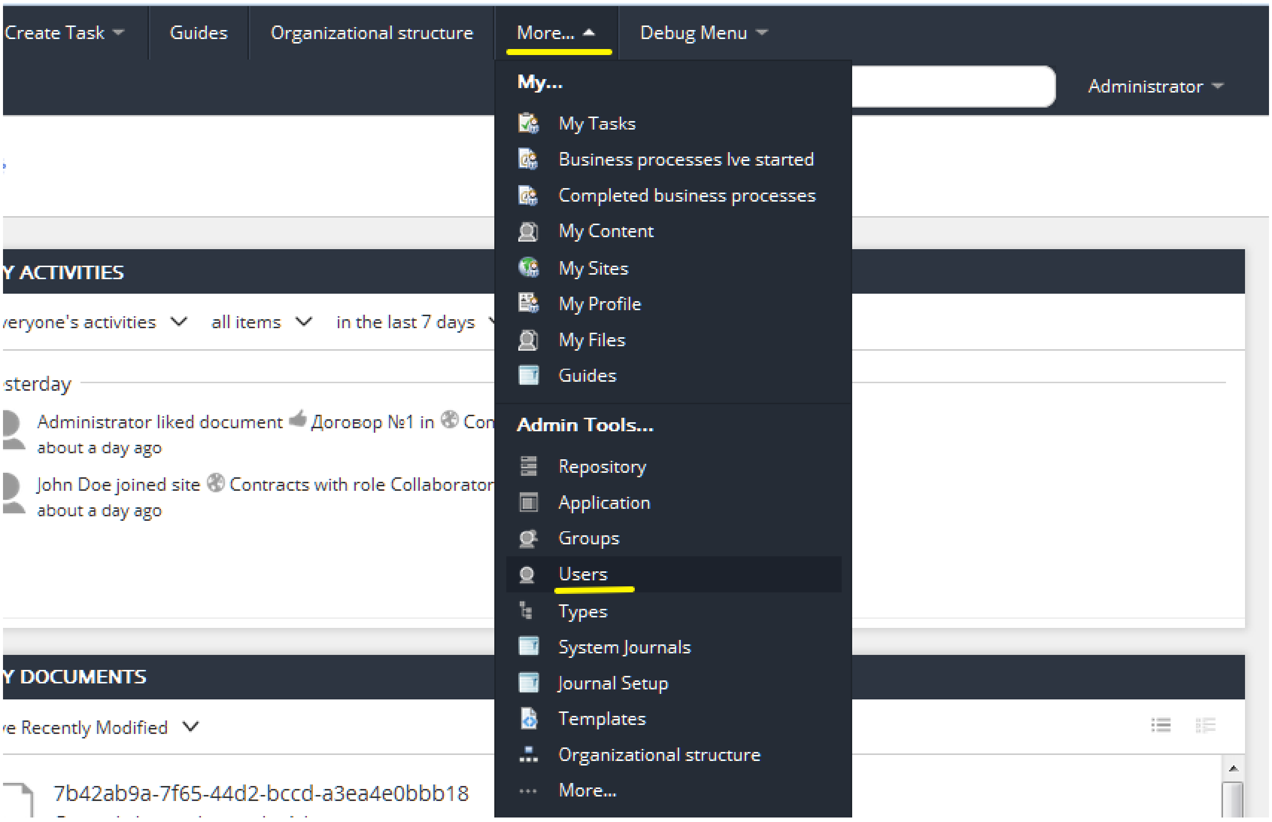
1. In Change password tab enter the current password, and enter the new password twice.
2. Press **Ok** button.



2.4. Creating new user.

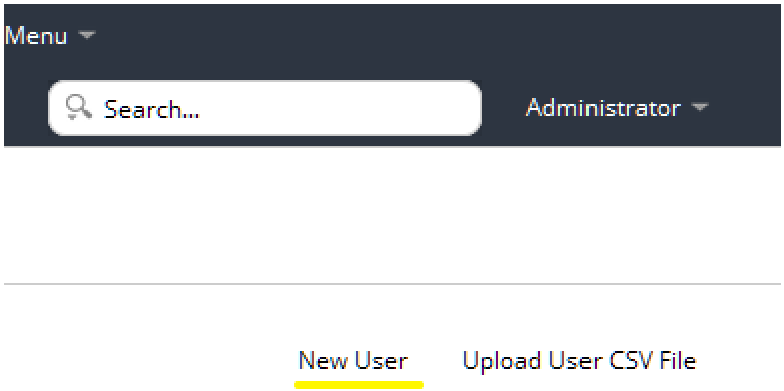
1. On the home page press **More** in the main menu.

2. In a drop-down list choose

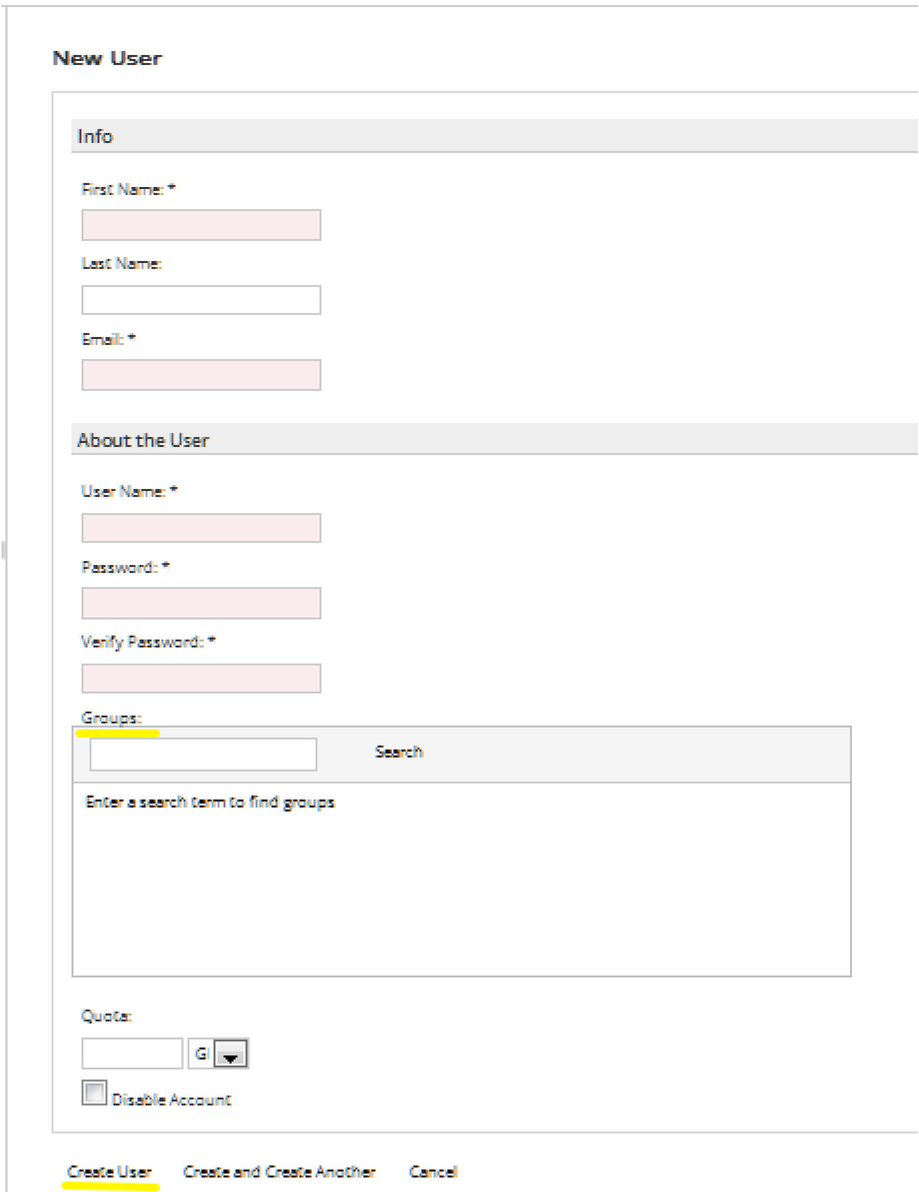


Users.

2. In the opened window press **New user**.



3. Fill in obligatory fields. In the **Groups** block you can choose a corresponding group for the new user.
4. Press **Create user**.


New User
Info
First Name: *
Last Name:
Email: *
About the User
User Name: *
Password: *
Verify Password: *
Groups:
Search
Enter a search term to find groups
Quota:
Disable Account
Create User
Create and Create Another
Cancel

3. System interface.

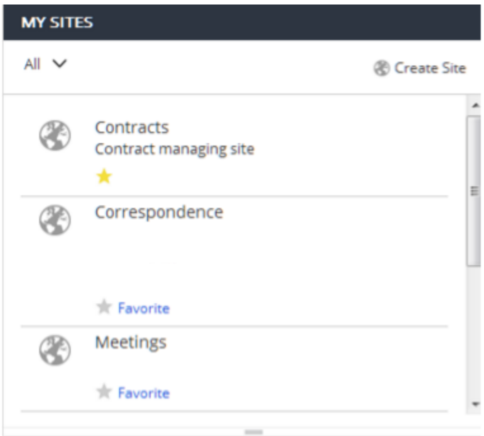
3.1. Home page description.

User home page consists of **main menu** (article 3.2 **Main menu sections**), **heading entry**, a **heading**, and the **range of dashlets**.

In this article you could find description of the dashlets that are most commonly used in the home pages of sites.

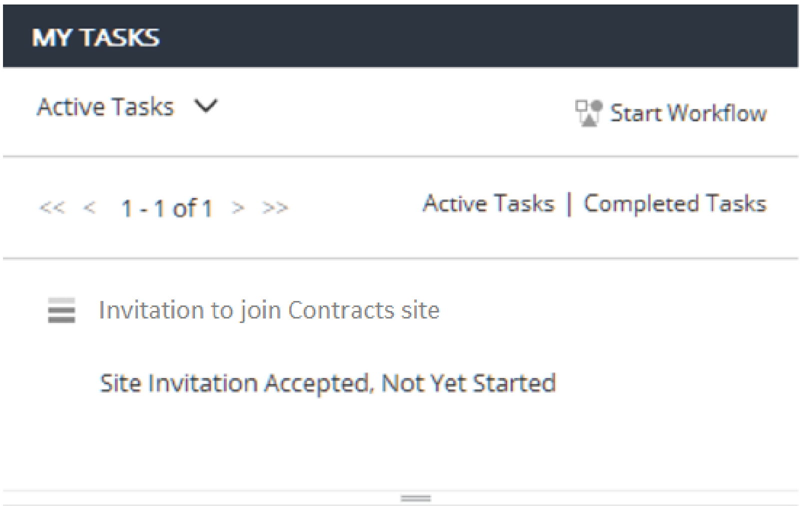
Dashlet **My sites**

- to create and delete sites; to transfer to another site that he/she is the participant of; to filter sites in Favorites.



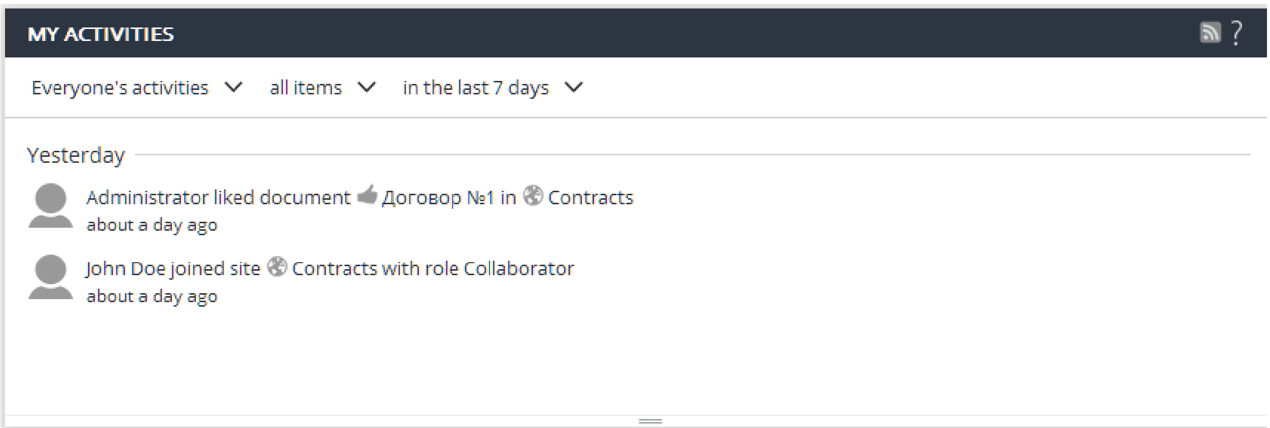
Dashlet **My tasks**

- to view assigned tasks.



Dashlet **My actions**

- to display news of any changes that took place on the sites that the user is part of. Information on new document versions, and users being added to or leaving sites.

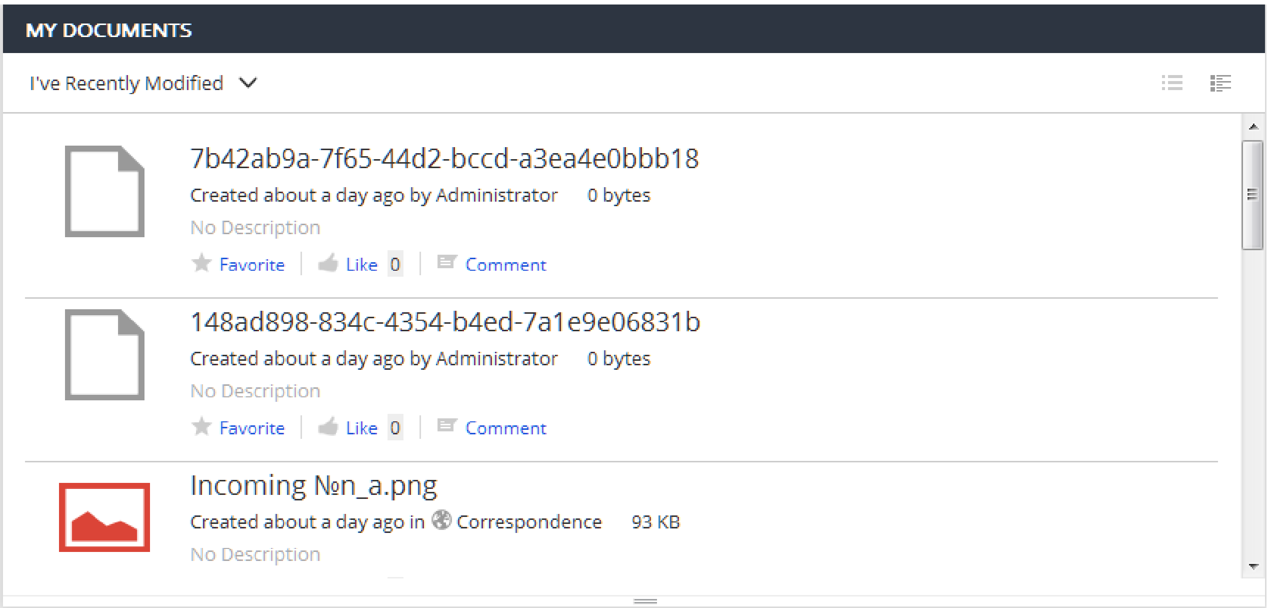


Dashlet **My documents**

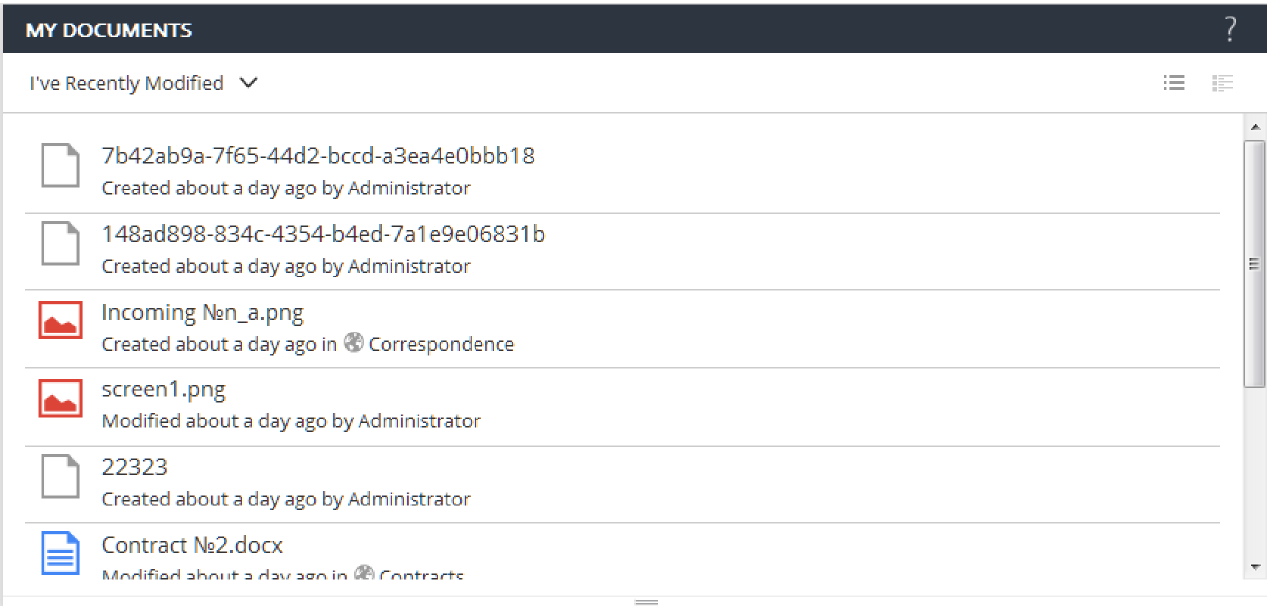
- to control documents changes that user has made. This dashlet has 2 display modes. The **Detailed view** mode is for:

1. Adding the document to Favorites in order to simplify the search later.
2. Rating the document by pressing “Like” or “Don’t like” button.

3. Going to the page with document details.

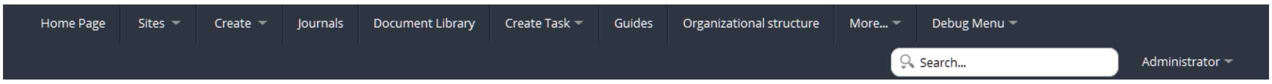


Simple view mode allows user to go to the page with document details.



3.2. Main menu sections.

Main menu is for easy and simple access to the system components.



The elements description is in the table below.

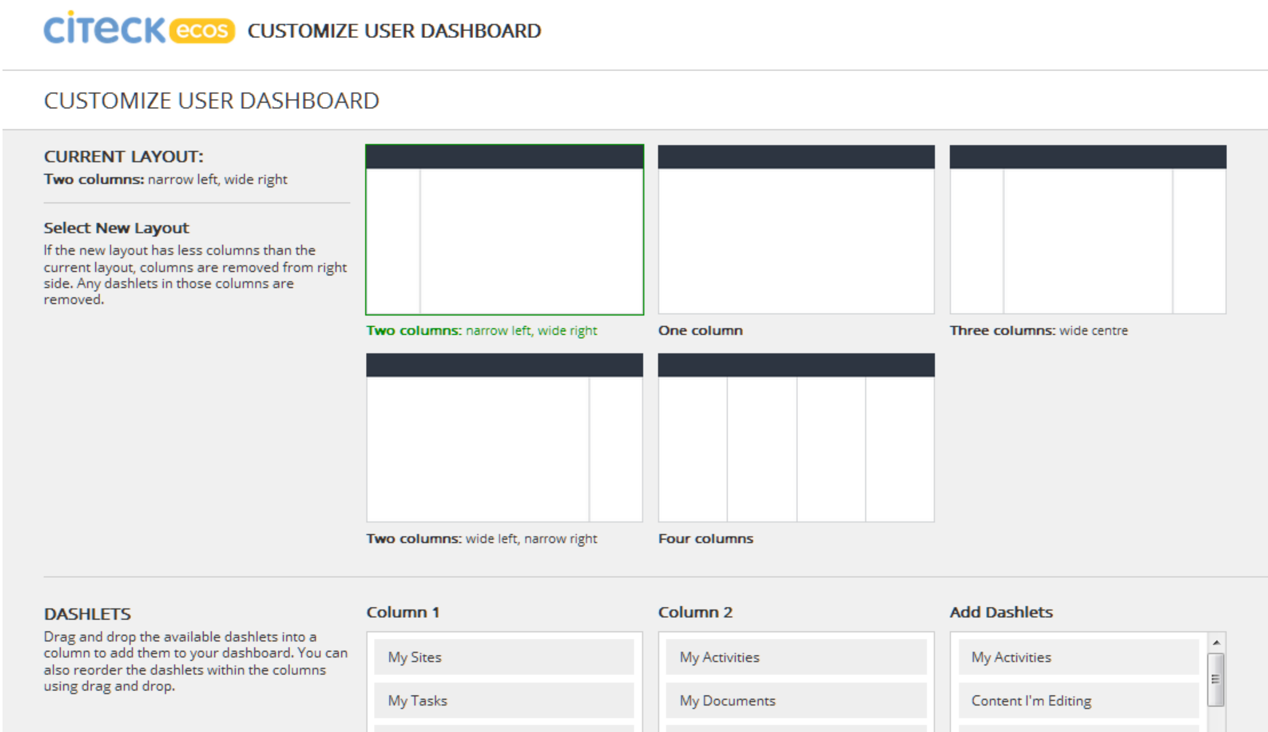
Element	Description
Home Page	Link to the user home page
Sites	Menu for managing sites, consists of 2 sections: user sites and site search.
Create	Menu for creating new documents or journal elements.
Journals	Link to the site journals.
Document Library	Link to the site document library.
Create Task	Link to creating approval and assignment flows. Only available if the site user has permission rights for document creation.

Guides	Link to system guides.
Organizational structure	Managing organizational structure, giving out permissions to the users and groups.
More...	Menu of additional actions.
Search...	Search field, link to the advanced search. Searching documents by the document name, type, update date, and keywords. Viewing results according to the site, or the common documents repository.
Administrator	User menu (above the search field).

3.3. User home page settings.

User could manually change the amount, schemes, and names of dashlets that are displayed on the home page.

To go to the page settings, click «Home page settings».



4. Managing sites.

Site – area of document management with cooperation with other users.

Site creator is by default set to be the Site manager. Additional managers could be added after the site is created.

Every Site has access settings: public or personal. This controls the site permission for other users.

Public site. Every user could have access to the site, but only participants could see its contents and work with it. User could ask to make him/her a participant.

Personal site. Only the participants could enter this Site. Users must get an invite in order to become a site participant.

To go the site home page, choose **Sites** in the **main menu**, and the necessary site from the drop-down menu.

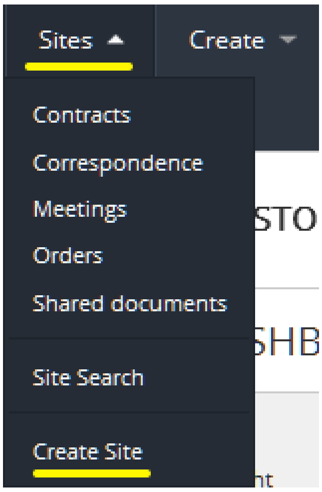
Site participants roles:

- Site manager (full permission rights).
- Editor (full permission rights to work with Site documents, except for deleting documents that were created by another user).
- Author (full permission rights for documents the user created).
- Reader (permission to view Site documents).

In organizational structure of the company, roles (user occupations inside the company) are created by the system administrator.

4.1. Creating site.

In main menu choose **Site** and press **Create Site**.



In the opened **Create Site** window fill in the obligatory fields (site name, URL name, site accessibility (public or personal), type), and press **Ok**.

4.2. Site types.

There are 2 **types** of Sites in the system:

- Site for document management
- Site for file storage

Site for document management is for storing and managing files of a certain type (for example, for Contracts site they are: Contracts, Add-l agreements, Invoices, Closing documents).

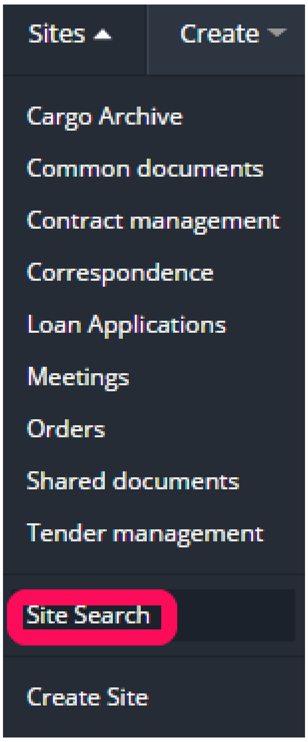
These documents are interacting and logically connected with each other. For these documents, business processes could be defined and set up beforehand.

Site for file storage is for storing common documents. Journal for document storage is automatically created for that site.

When adding entries to the journal (documents), all form fields should be filled in.

4.3 Deleting site

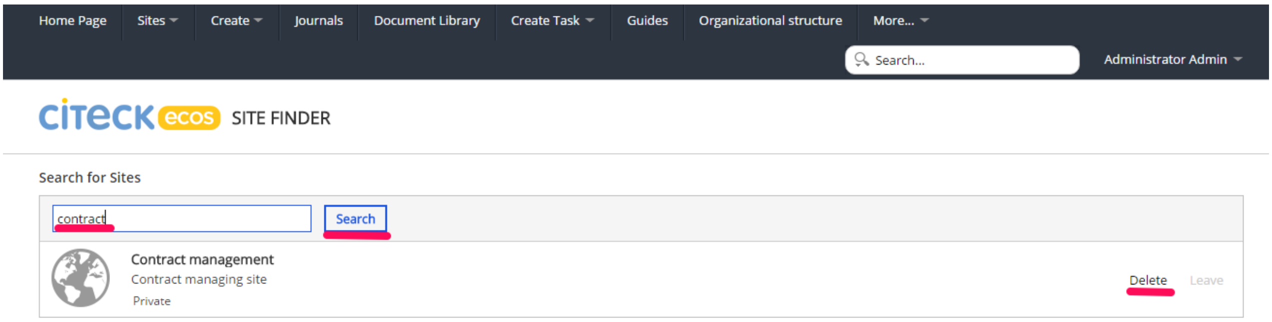
To delete a site, in the main menu select **Sites – Site search**



Search page will open.

Section **Search sites** -> enter a definition (name of the searched site) -> press **Search**.

In the result list select necessary Site -> press **Delete**.



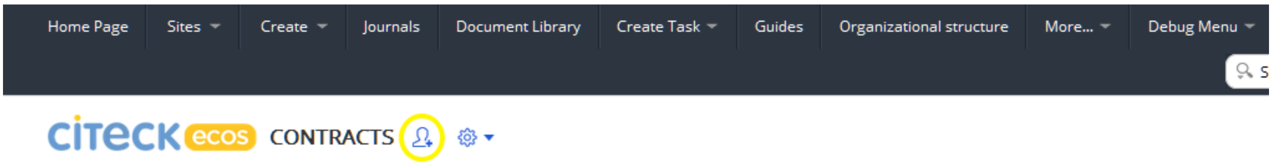
4.4. Adding User or Group to the site.

To work with the site, the user has to be its participant. Site Manager could send out invites to the users for them to become participants with given roles.

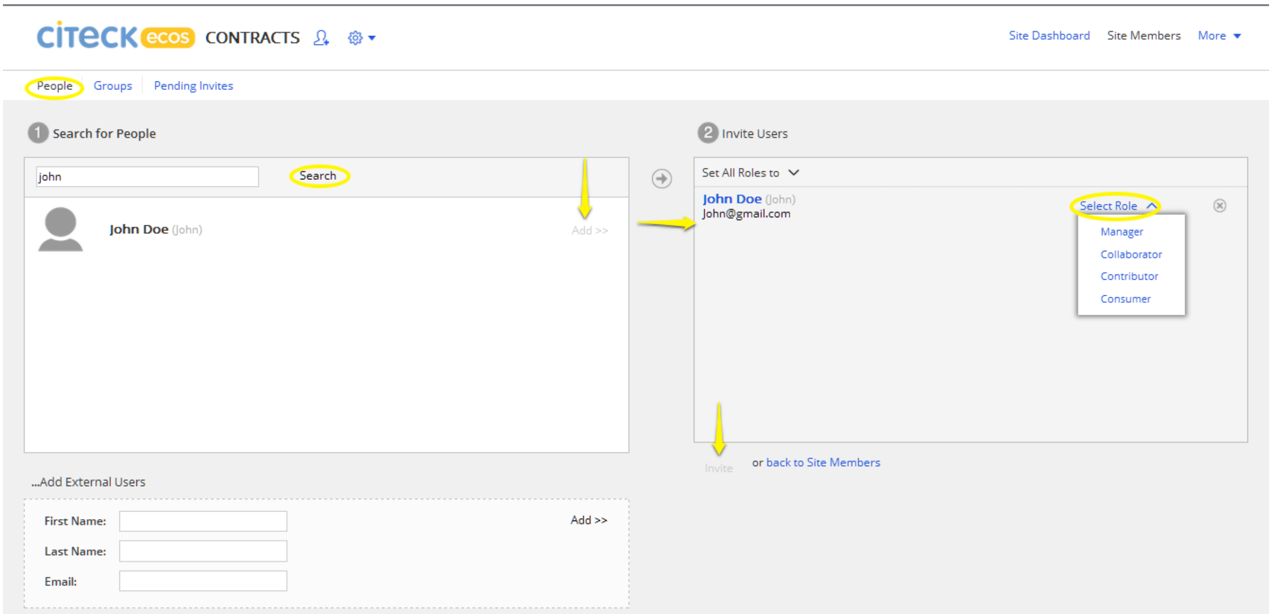
If the group of users is invited to the Site, they become the participants on default (without the invites sent out).

To invite users to the Site (to give them permissions), you would need to:

1. Go to Site home page.
2. Go to user invites, using site’s navigational panel..

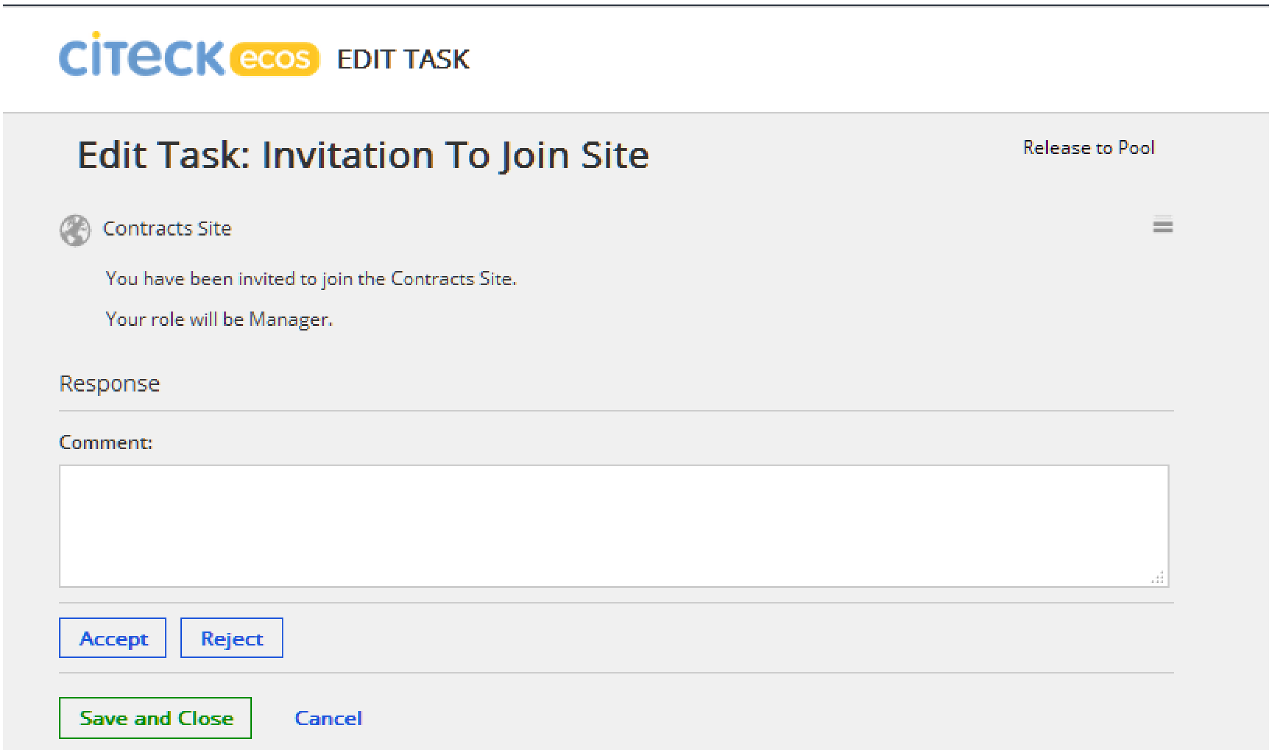


3. Using search, select users that would become Site participants.
4. Press **Add** button near the selected user.
5. Appoint roles to the selected users.
6. To send out invites to the selected users, press **Invite** button below the form. This button becomes active after all users have been appointed roles.

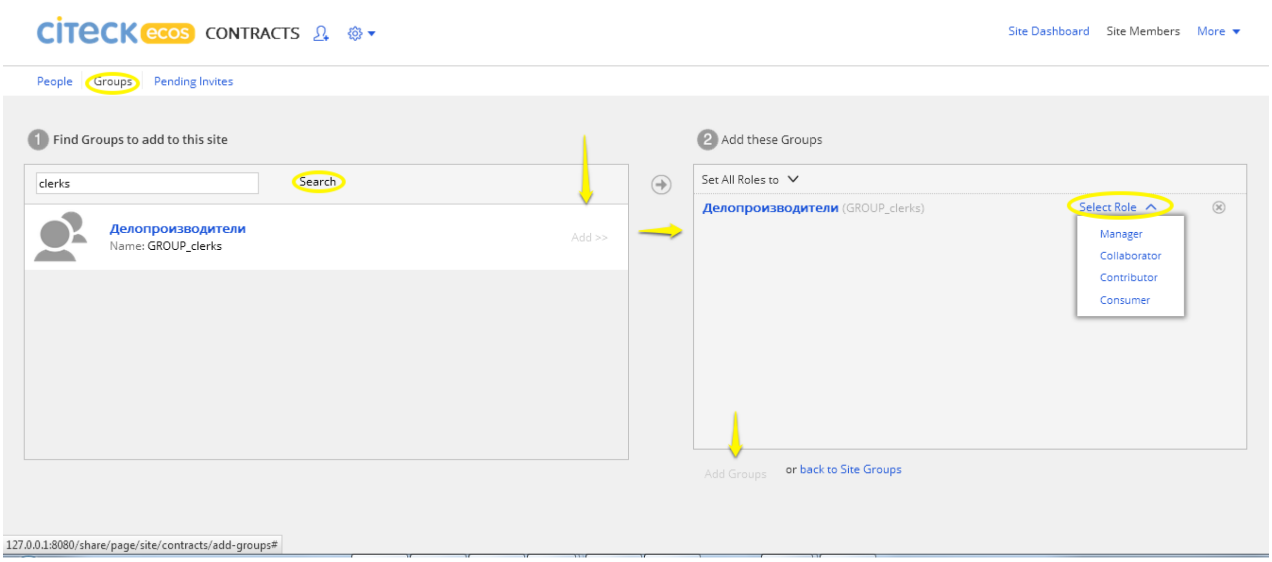


Selected users will receive invites to become Site participants. Выбранным пользователям будут разосланы приглашения, присоединиться к Сайту.

To add **external users** to the Site, there is a separate form, located below the form for adding Site users.



To add **groups of users** to the Site, repeat the same actions in the Groups tab.



When adding groups of users to the site, the invites are not sent out.

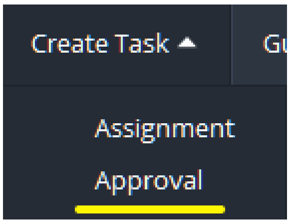
4.5. Creating approval and assignment tasks.

Approval and assignment tasks could be created for any site (Contracts, Orders, Correspondence) and any document.

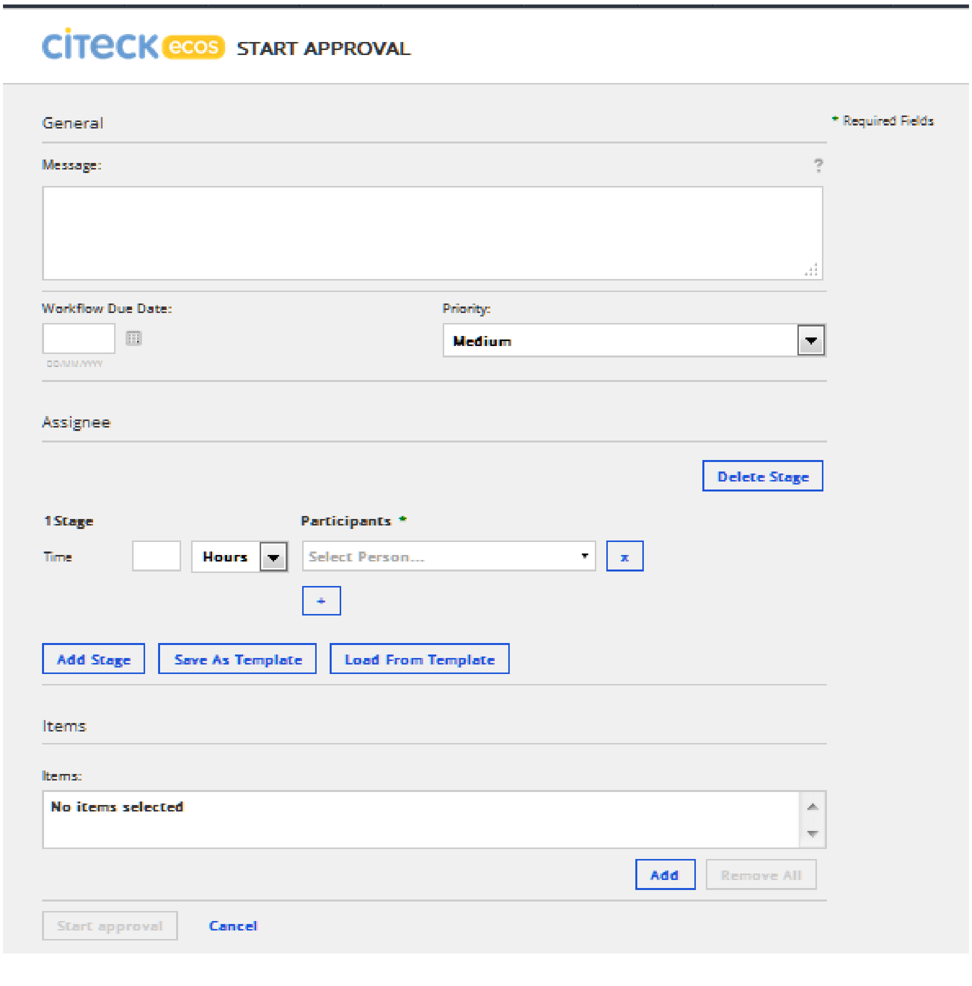
4.5.1. Creating approval task.

To start Approval flow for any document, follow these steps:

1. In main menu select Create task -> Approval.



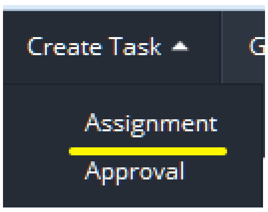
On the opened page fill in obligatory fields and press **Start Approval**.



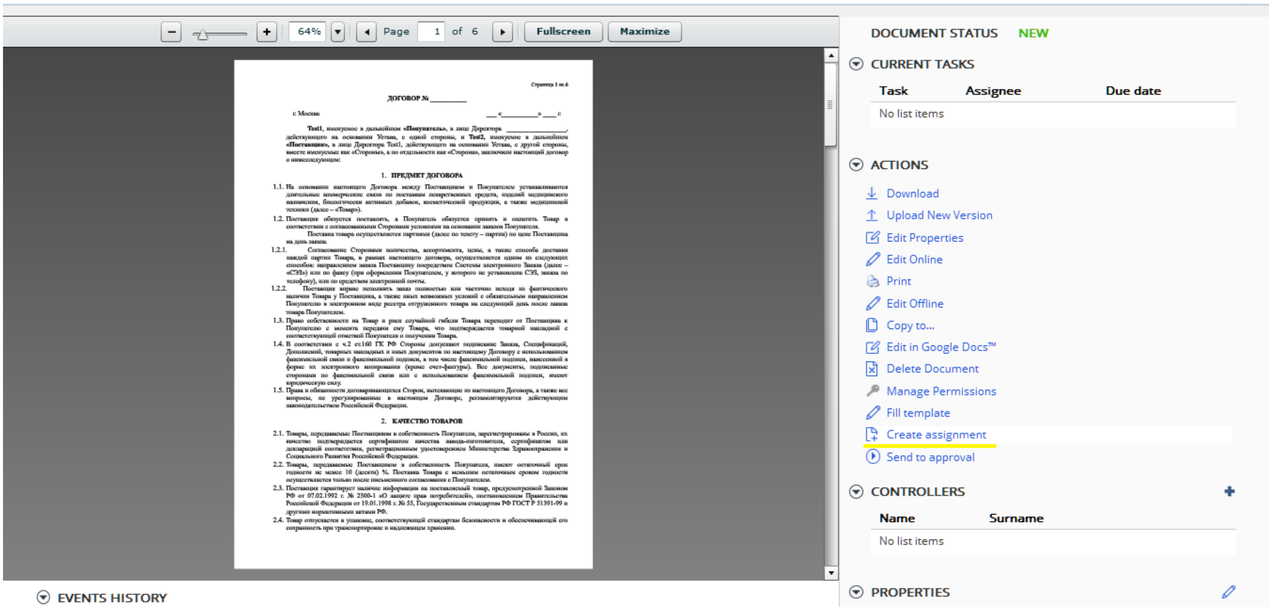
4.5.2. Creating assignment task.

To start the **Assignment** task, follow these steps:

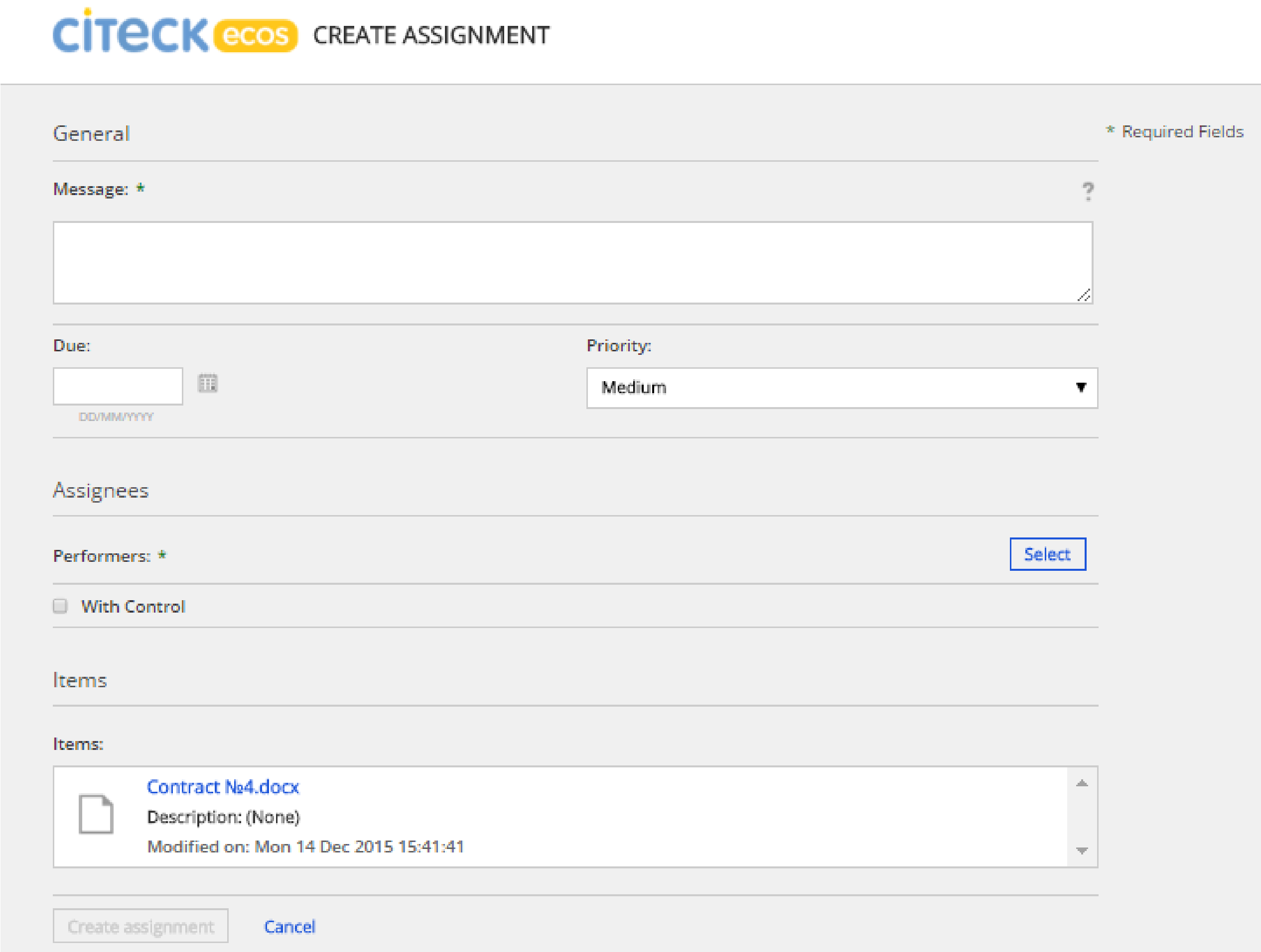
1. In **main menu** choose **Create task** -> **Assignment.**



2. In **document card** press action **Create assignment.**



On the opened page fill in obligatory fields and press **Create assignment.**



4.6. Managing “Contracts” site.

Managing contract flow, creating contracts, registering, approving and performing contact tasks. Citeck Ecos offers a comprehensive solution for your company.

Main features:

- Unified contract library
- Controlling contract expiration dates
- Fast contracts, invoices, closing documents search

- Comprehensive contract approval process
- Involvement of the contractor in the approval process
- Printing out approval list
- Storing attachments or any files related to the contract
- Creating contracts by templates
- Viewing contract and correlated documents online
- COmparing contract versions online
- Controlling contract permissions
- Creating assignments for the contract

4.6.1. Contract life cycle.

Life cycle allows to combine several flows in one. It could be set and altered for every type of document.

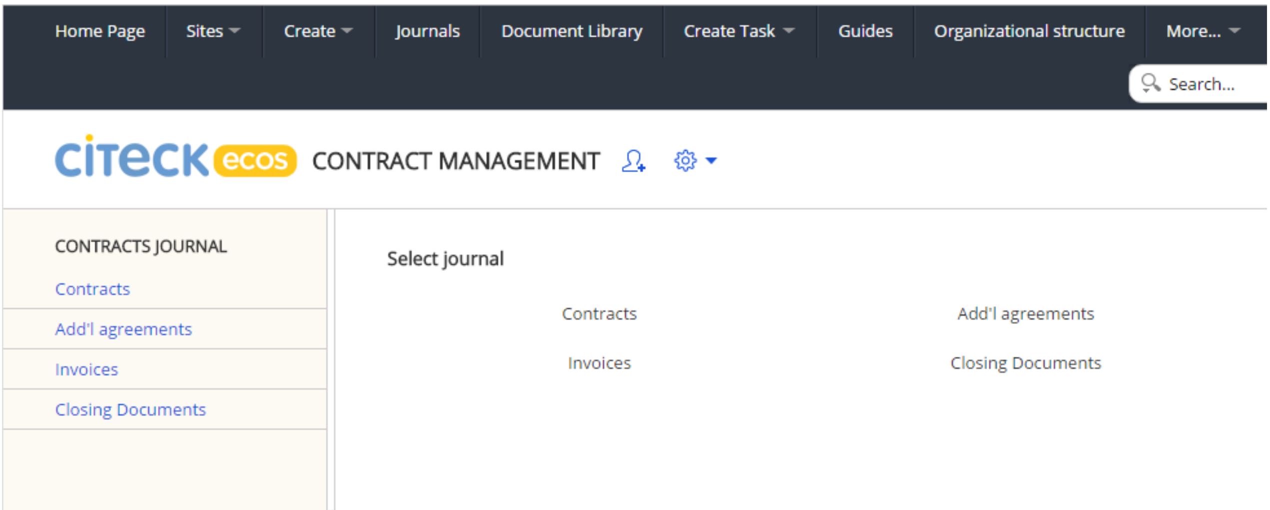
For example, contract life cycle looks like this:

- creation;
- approval (includes several stages in some cases);
- signing;
- performance;
- archiving.

4.6.2. “Contracts” site journals.

To transfer to Journals, in the main menu press **Journals** -> in **Choose journal** block press a button with any type of document.

Journals are created for every type of Contractual document (contracts, add-l agreements, invoices, etc.). There could be any number of journals; their layout could be changed via column settings. To reduce the time of searching for a specific document, use filtering option to filter the search by a given criteria (by the contractor, currency, etc.). Filters could be saved for later and exported into .xls or .pdf format into the external database.



By default, there are 4 journals in the Contracts site:

- **Contracts** – for storing contracts and other partnership documents
- **Add-l agreement** – for storing additional agreements, attached to the contracts
- **Invoices** – for storing invoices both from and for partners.
- **Closing documents** – for storing closing documents like acts.

Contracts journal is the unified contract register, created according to the data on the contractual documents (created or uploaded into the system).

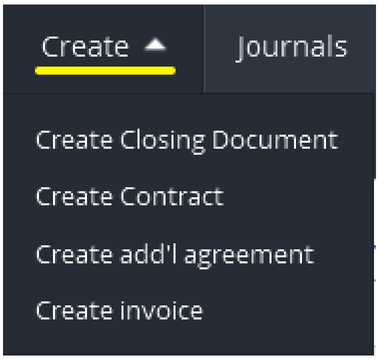
4.6.3. Creating documents.

To create one type of the document:

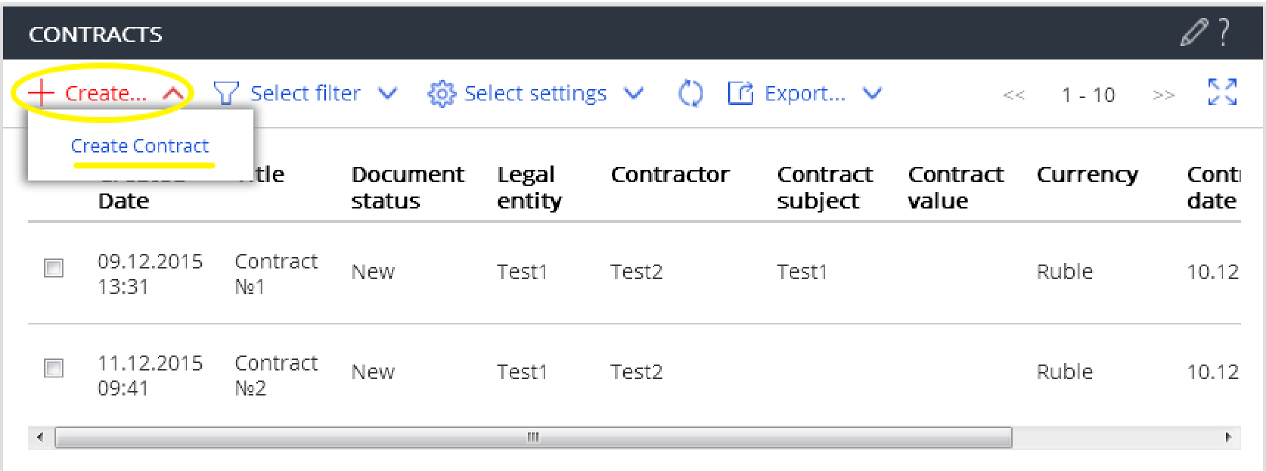
- Closing document;
- Contract;
- Additional contract;
- Invoice.

complete any of these three actions:

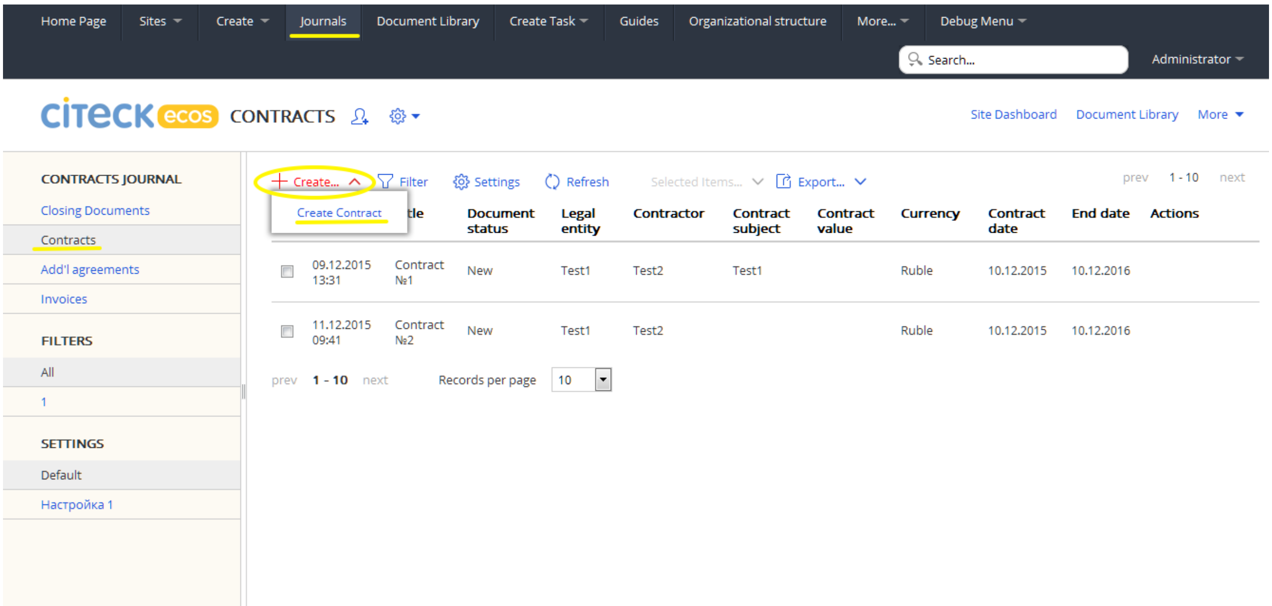
1. In **main menu** press **Create.**
Choose document type from the drop-down list.



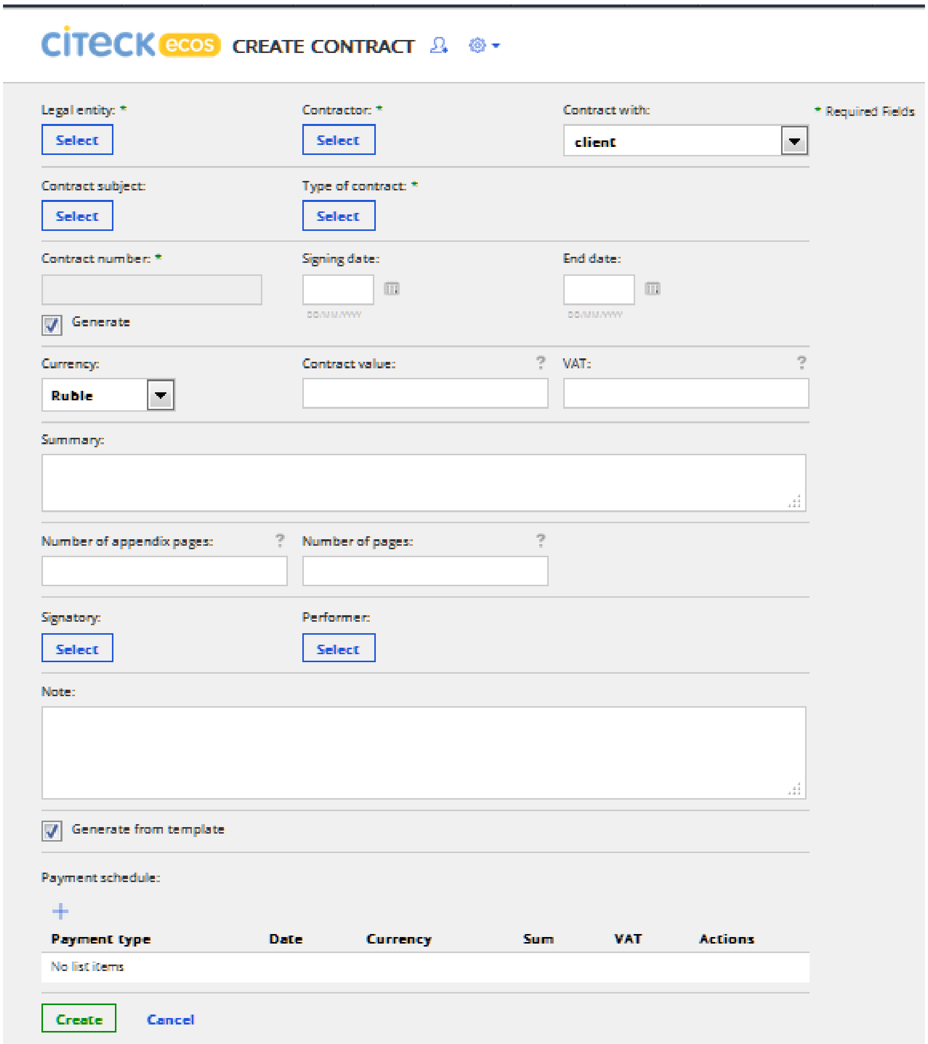
2. In **Journals** dashlet on the **home page**, choose **Create contract** in the menu **Create** (follow the same steps for any other document type).



3. In main menu choose **Journals** -> **Create** -> **Create contract.**



On the opened page **Create contract**, fill in obligatory fields and press **Create**.



4.7. Managing "Correspondence" site.

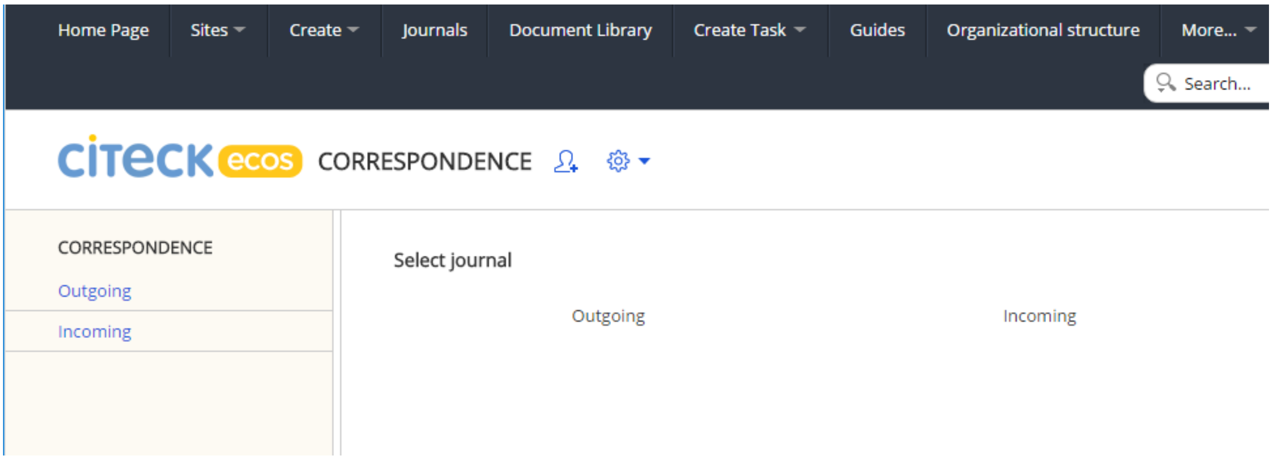
Tools and features of Citeck EcoS are perfect for timely accountancy, registration, control and execution of the incoming and outcoming correspondence.

Features:

- Creating documents by templates.
- Convenient typical processes.
- Controlling document expiration date.

4.7.1. “Correspondence” site journals.

To transfer to site journals, in **main menu** press **Journals** -> in block **Select journal** press a button with the name of any type of correspondence.



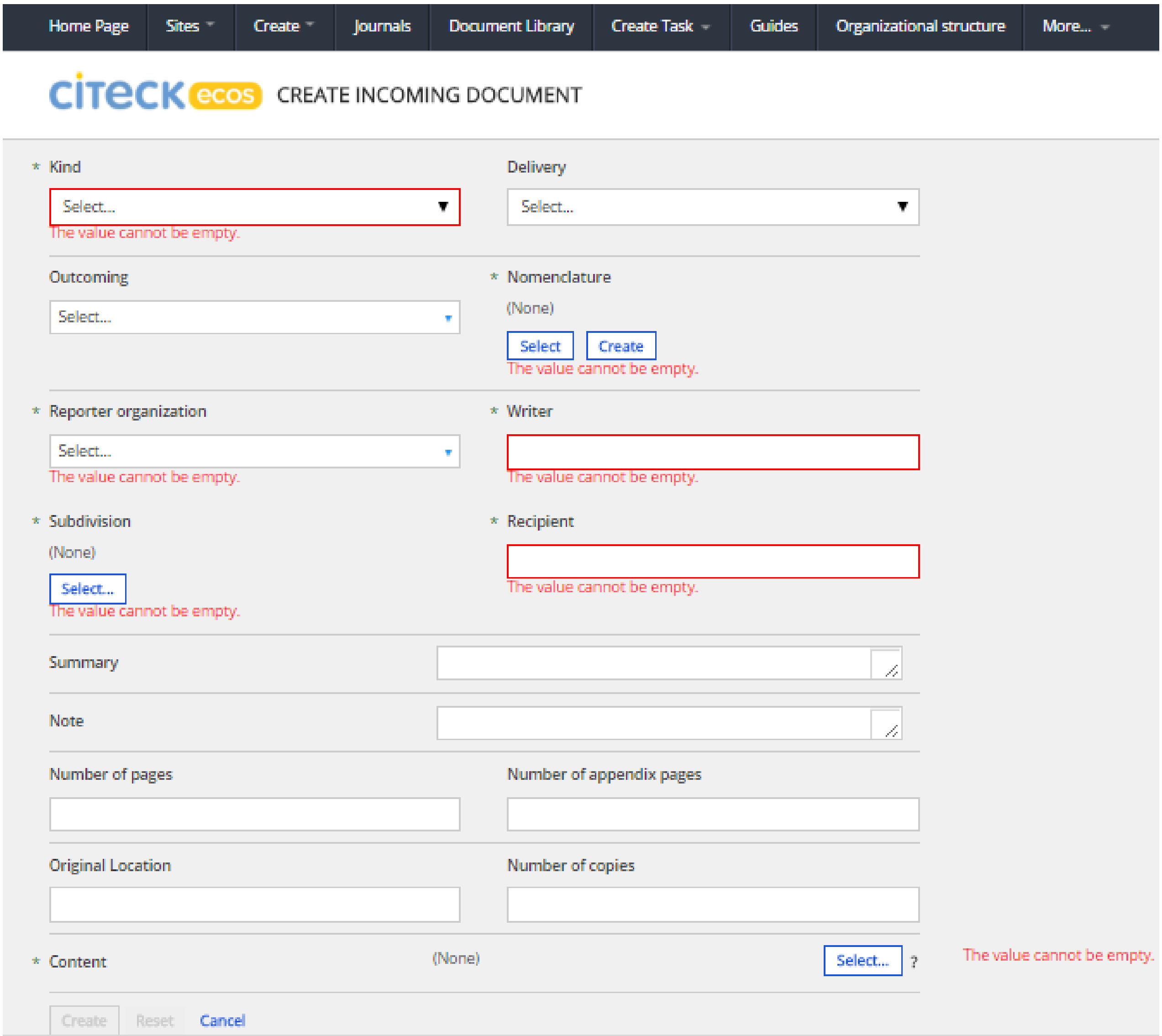
On default, Correspondence site has 2 journals:

- **Incoming** – for storing incoming documents.
- **Outcoming** – for storing outcoming documents.

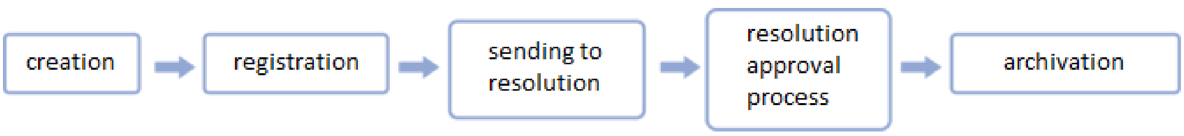
4.7.2. Creating incoming correspondence.

In **main menu** press **Create** -> choose **Incoming** type of correspondence from the drop-down list.

In the opened page fill in obligatory fields and press **Create incoming document.**



Life cycle of an incoming document looks like this:



Incoming document could be created out of the **outcoming one**:

1. Site **Correspondence**-> journal **Incoming** (dashlet **Correspondence**) -> select necessary document.

2. Document card -> section **Actions** -> **Create incoming**.

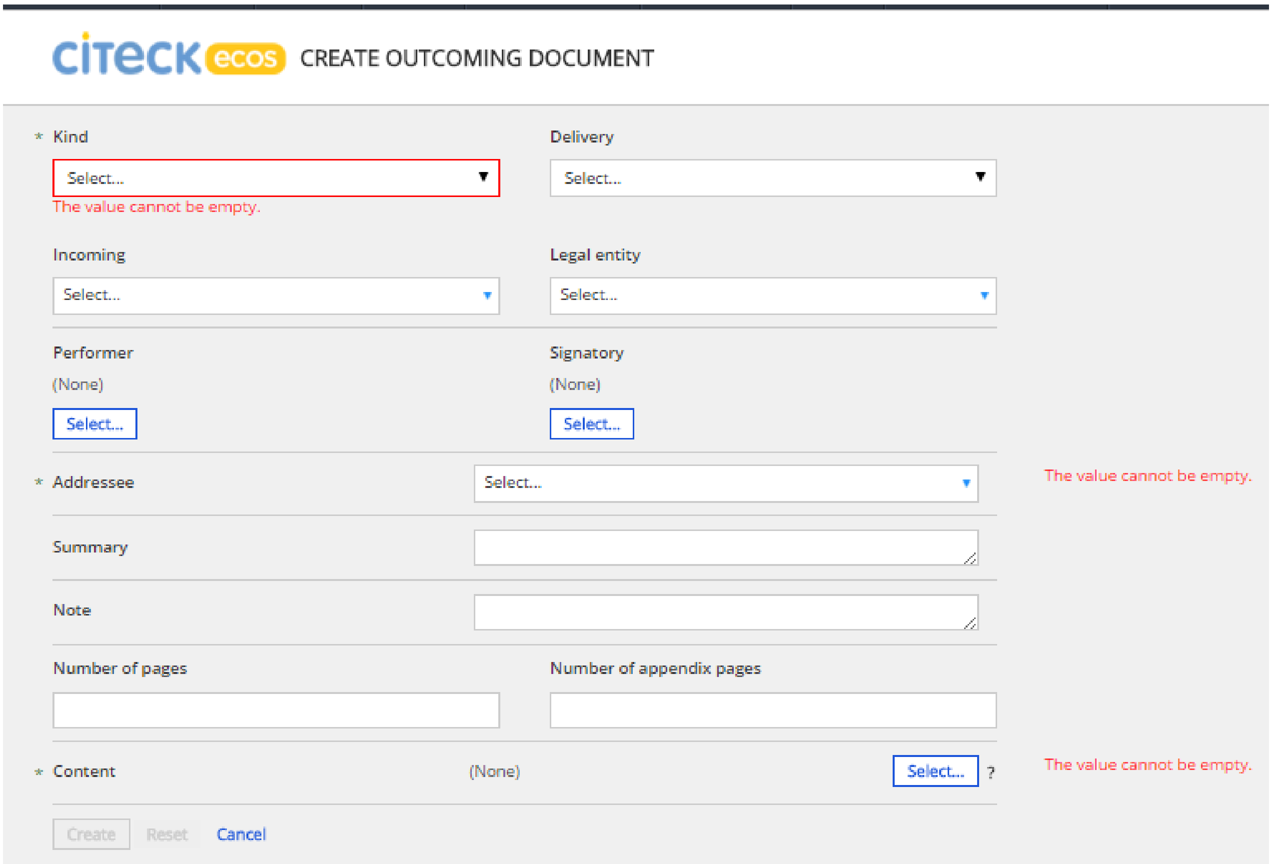
3. Fill in obligatory fields, attach the file -> press Save.

If the **incoming document** is created from the **outcoming**, then these documents are connected. The link to the connected documents is in the section **Document connections** in the document card (the incoming one has the link to the outcoming one, and vice versa).

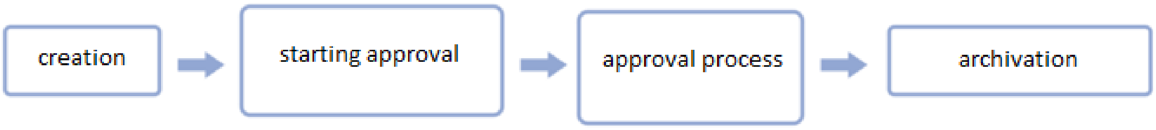
4.7.3. Creating outcoming correspondence.

In **main menu** press **Create** -> from the drop-down list select type of correspondence: outcoming.

On the opened page fill in obligatory fields and press **Create outcoming document.**



The life cycle of an outcoming document:



4.8. Managing “Orders and assignments” site.

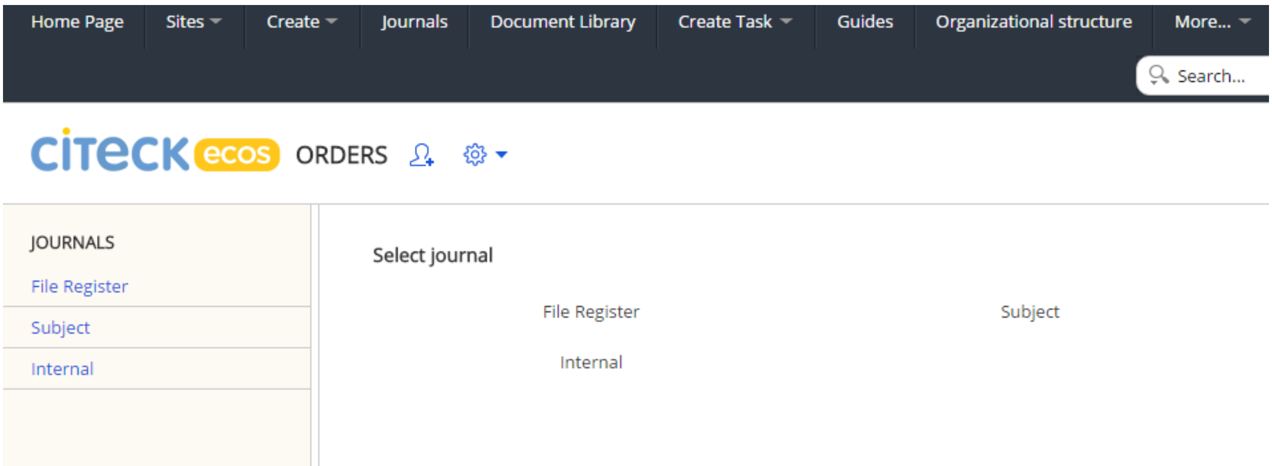
Citeck EcoS has the functionality to improve efficiency of creating, approving, storing, signing and performing orders, assignments, tasks, instructions and official notes.

Features:

- Creating documents by templates.
- Convenient typical flows.
- Controlling due dates for the documents.

4.8.1. “Orders” site journals.

To transfer to site journals, in main menu press Journals -> in the Select journal block press the button with the name of any type of document.



By default, there are 3 Orders journals:

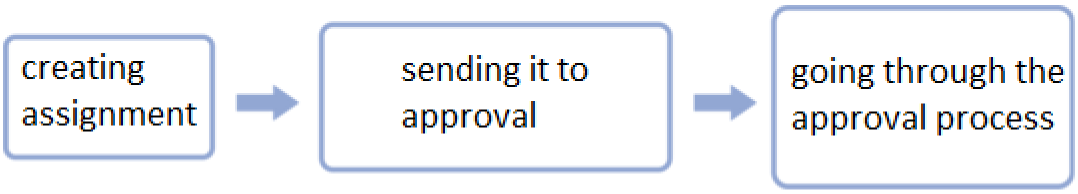
- Internal – for storing all internal documentation of the company (orders, official notes, etc.)
- Subject – for storing document subjects.
- File register – for storing systematic register of files and cases created by the company.

4.8.2. Creating content.

In **main menu** press **Create** -> select content type from the drop-down list:

- Internal document
- Subject
- File register.

The life cycle of the internal document:



5. Cardlets and tabs settings.

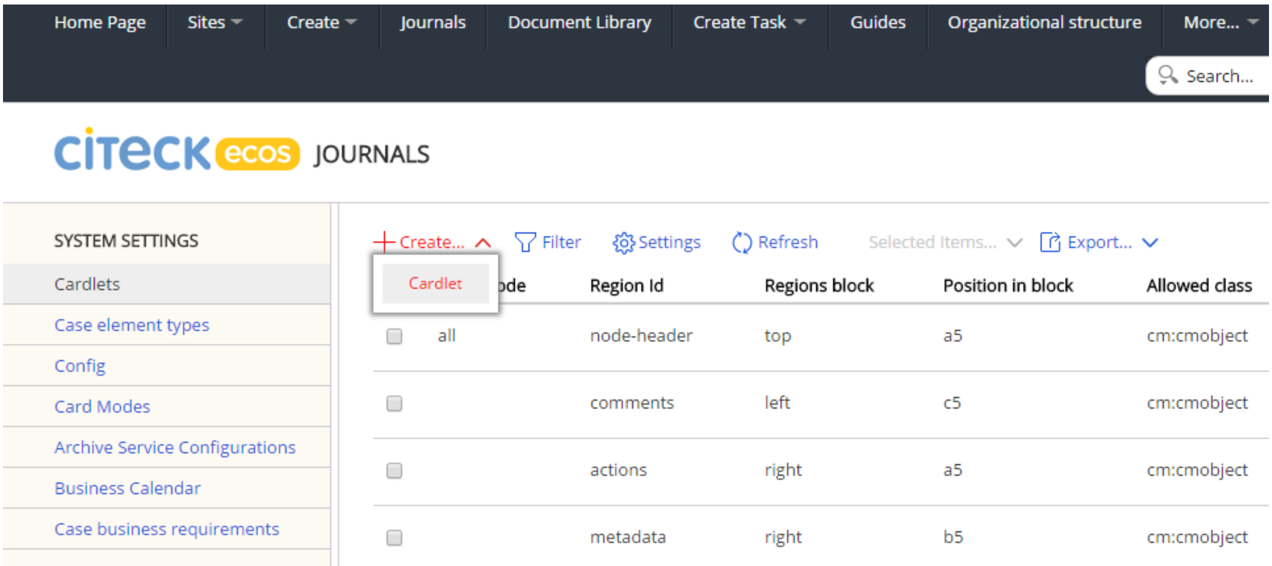
Document card is a page, containing main info on the document, consisting of cardlets (Event history, Comments, Properties, etc.).

Cardlets – section of a document card page.

Tab – the element of a document card page, consisting of cardlets.

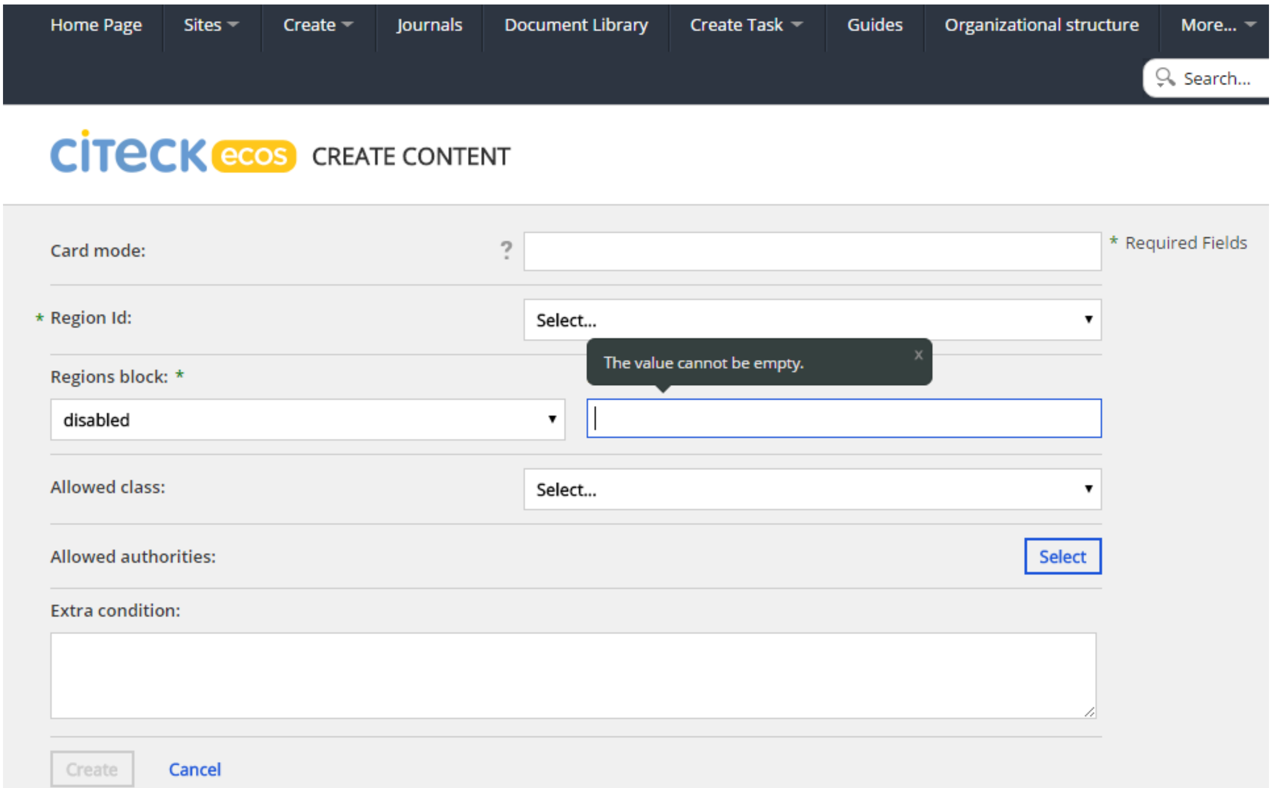
5.1. Creating cardlets.

To create a section, in **main menu** press **More** -> **System journals** -> **Cardlets**-> in the opened journal tool bar press **+Create…** -> **Cardlet**



Cardlet creation form consists of:

- **Card tab** (empty value indicates that it is displayed on the common tab)
- **Regions ID** – component identifier that will be shown on the cardlet.
- **Regions block** – location of the cardlet on the screen.
- **Position in block** – text value for determining cardlet order inside a block (lexicographically).
- **Allowed class** – class (or aspect) of a document, in card of which the cardlet will be displayed. If parent type is entered, then cardlet will be displayed in cards of all type children.
- **Allowed authorities** – those who can view the cardlet. If the value is empty – everyone can view it.
- **Extra condition** – condition for displaying the cardlet, expression on javascript.



Standard Alfresco modes:

- node-header – header;
- web-preview – preview;
- actions;
- metadata – document properties;
- comments;
- document-versions;
- document-workflows.

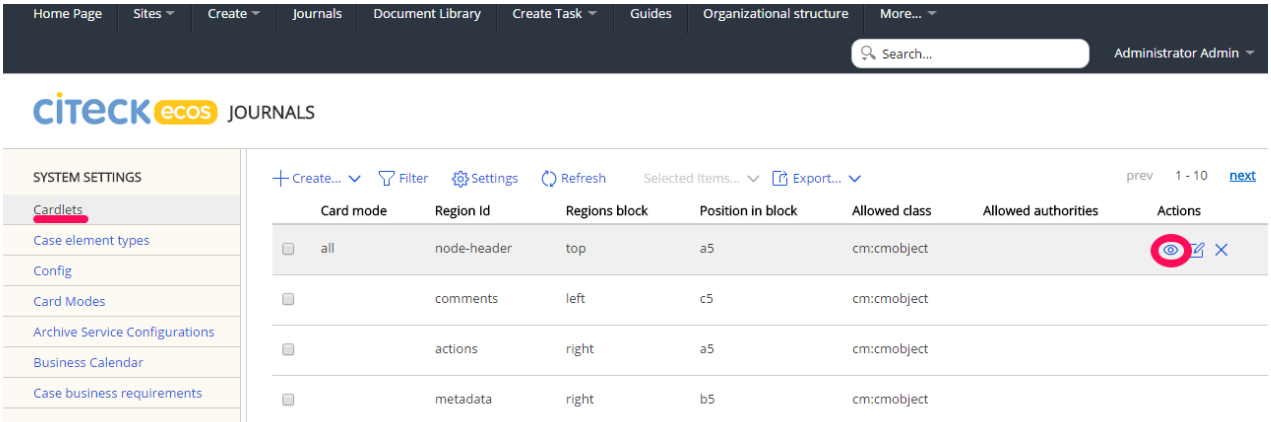
Standard EcoS modes:

- current-tasks;
- document-tasks – user tasks;
- document-status;
- history – document even history;
- associations – document associations;

- node-view – document form;
- card-templates;
- supplementary-files;
- document-version-comparison;
- etc.

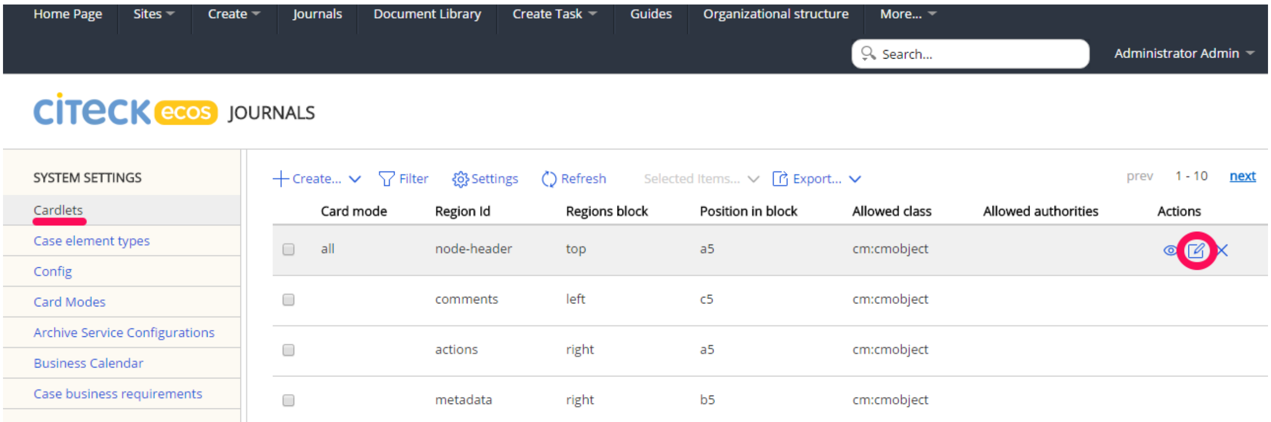
5.1.1. View cardlet.

To view cardlet card, in main menu press **More** -> **System journals** -> **Cardlets** -> in the opened journal select a cardlet -> **Actions** section -> press **View document**.



5.1.2. Editing cardlet.

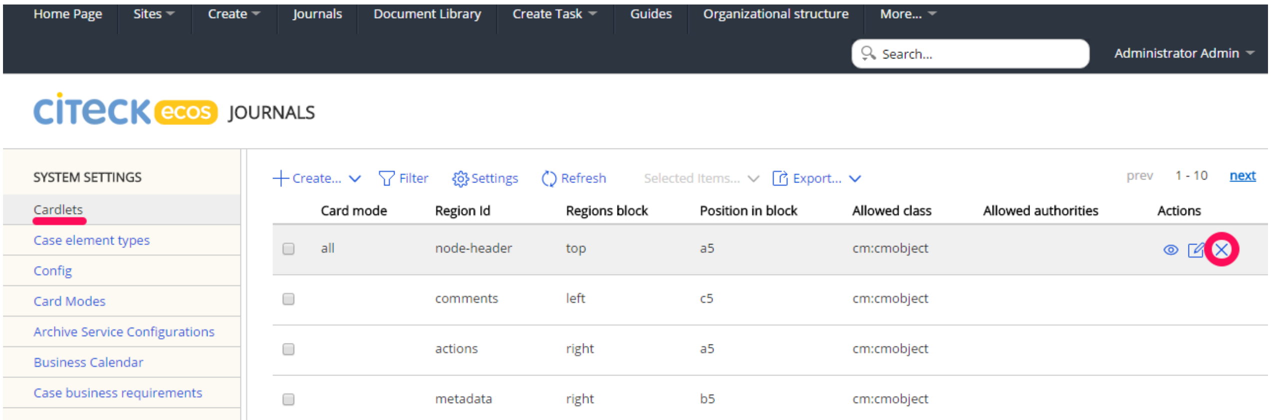
To edit cardlet, in **main menu** press **More** -> **System journals** -> **Cardlets** -> in the opened journal select a cardlet -> **Actions** section -> press **Edit properties**.



In the opened window Edit properties, you could edit and save field values, described in 5.1.

5.1.3. Deleting cardlet.

To delete a cardlet, in the main menu press **More** -> **System journals** -> **Cardlets** -> in the opened journal select cardlet -> Actions section -> press **Delete document** -> in the opened window **Delete document** press **Delete** (for cancelling press **Cancel**).



5.2. Creating card tabs on the card page.

To create a card tab, in the **main menu** press **More** -> **System journals** -> **Card tabs** -> in the opened journal tool tab press **+Create...** -> **Create Tab**

Tab creation form consists of:

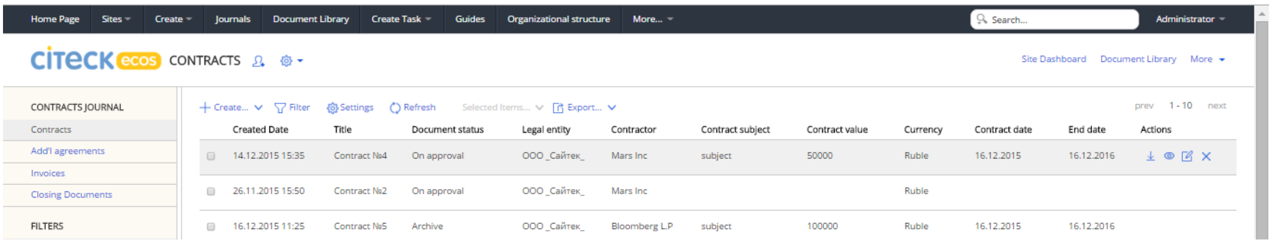
- Card tab ID;

- Title – displayed in the card;
- Description – displayed when putting cursor over;
- Card tab order;
- Allowed class - class (or aspect) of a document, in card of which the cardlet will be displayed. If parent type is entered, then cardlet will be displayed in cards of all type children.
- Allowed authorities – users, groups;
- Extra condition on javascript.

6. Journals

6.1. Viewing journal.

In **main menu** select **Journals** -> select journal from the list -> the selected journal is opened, with the info in table form.



In "Actions" column, when hovering mouse over journal entry, the document action signs are displayed:

View document - link to the document card (another way to go to the document card is to double click the document line).

Change settings - link to the card settings (attributes).

Download - download the main file attached to the document.

Delete document - delete the selected document.

The selection of displayed document actions depends on the permission rights.

6.2. Document journal tool bar.

Create... — link to creating new element of the selected journal.

Filter — filtering journal entries by the given parameters.

Settings — journal display settings.

Refresh — refresh the journal.

Selected Items... — displays the actions available for the selected documents: Download as ZIP, Copy to…, Move to…, Delete, and Don’t Highlight.

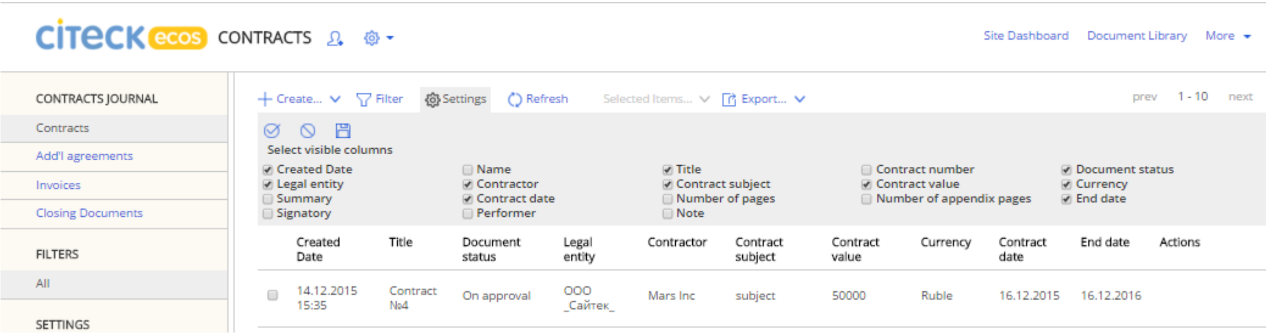
Export... — exports selected table as HTML(view), HTML(download), PDF, Excel.

To display or hide any journal table columns:

Press Settings

In the opened list select columns you want to be displayed.

Press **Apply settings**.



Select the amount of entries displayed on the page (under the journal entries table).

If necessary, save settings for future use by pressing **Save settings**, in the opened window enter the setting name and press **Save**. Saves settings will be displayed in the journal settings list.

6.3. Searching the journal.

To filter lists by a given criteria, press Filter

Add criterion selecting search criterions.

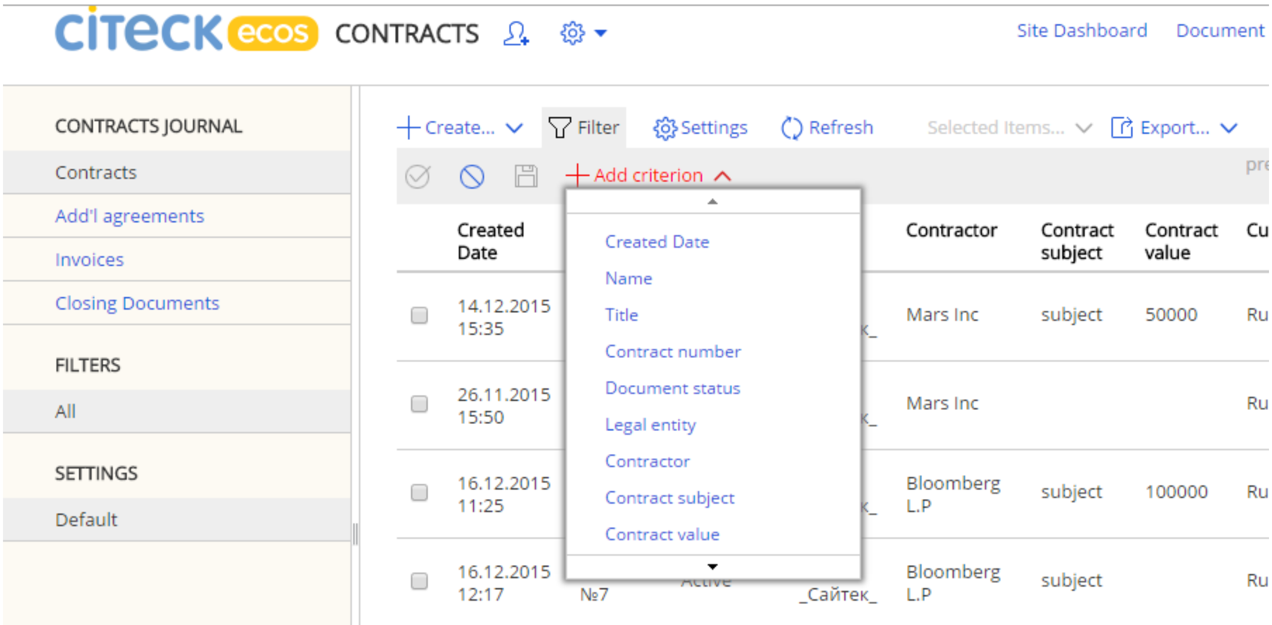
Apply criteria - applying filtering criteria.

Delete criteria - cancel the criteria selection.

Save filter - saving filtering criteria.

Guide for searching journal entries **by the given criterion**:

1. Press **Filter**.
2. Press **Add criterion**.
3. Select the criterion from the list.



4. Put in search conditions under for the selected criteria.

- deleting criteria from the filter.

5. If necessary, add more criteria.
6. Press **Apply criteria**.
7. If necessary to save filter conditions for future use, press **Save filter**, in the opened window put in filter name and press Save. Saved filter will be displayed in the journal filters list.

To delete filter press next to the filter name on the left of the journal filter list. The button appears when hovering mouse over its name.

To hide filter buttons and search criteria, press **Filter**

To go back to the full list of journals, press **Filter**, and then Delete criteria.

6.4. Task journal

Task journal contains info on tasks, assigned to a user or a group he is a part of.

In the column **Actions** the task action buttons appear when hovering mouse over journal entry:

Edit task - opening task page to edit it.

View task - opening task page to view it.

View workflow - opening workflow info page, that controls the current task.

6.5. Task journal tool tab.

Filter- filtering journal entries according to the given criteria.

Settings - journal display settings.

Refresh - reload the journal.

Export to – exporting this table to HTML(view), HTML(download), PDF, Excel.

Tasks – list of the tasks available for the journal user.

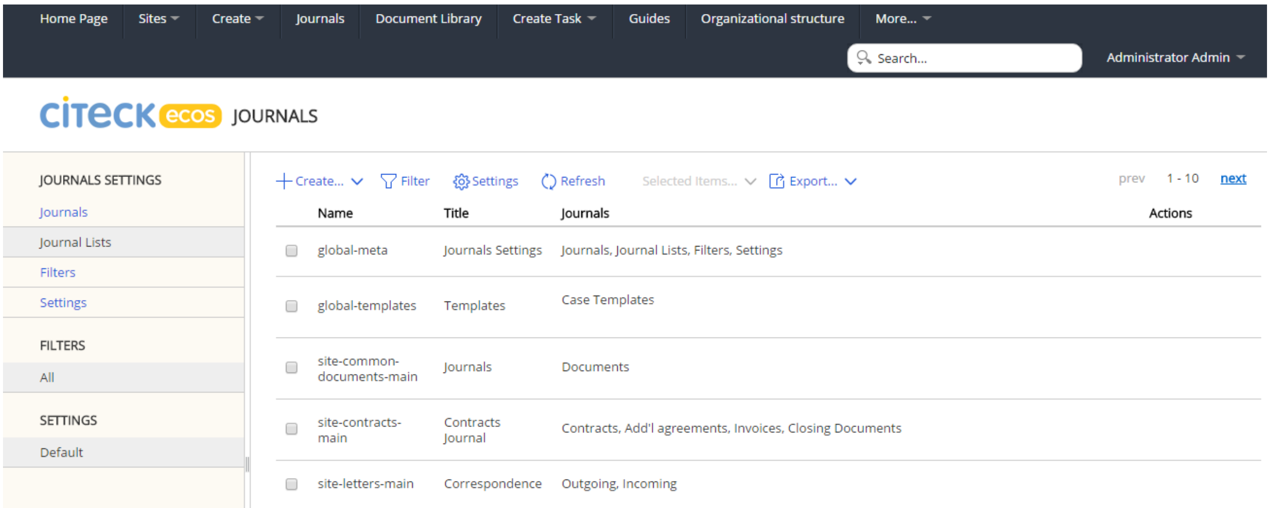
Filters – list of saved filters of a selected journal.

To go to the document that is the source of the task, and to perform the task, double click the left mouse button on the selected task line.

Adjusting task journal view and searching the journal is the same as for the document journal.

6.6. Journal settings.

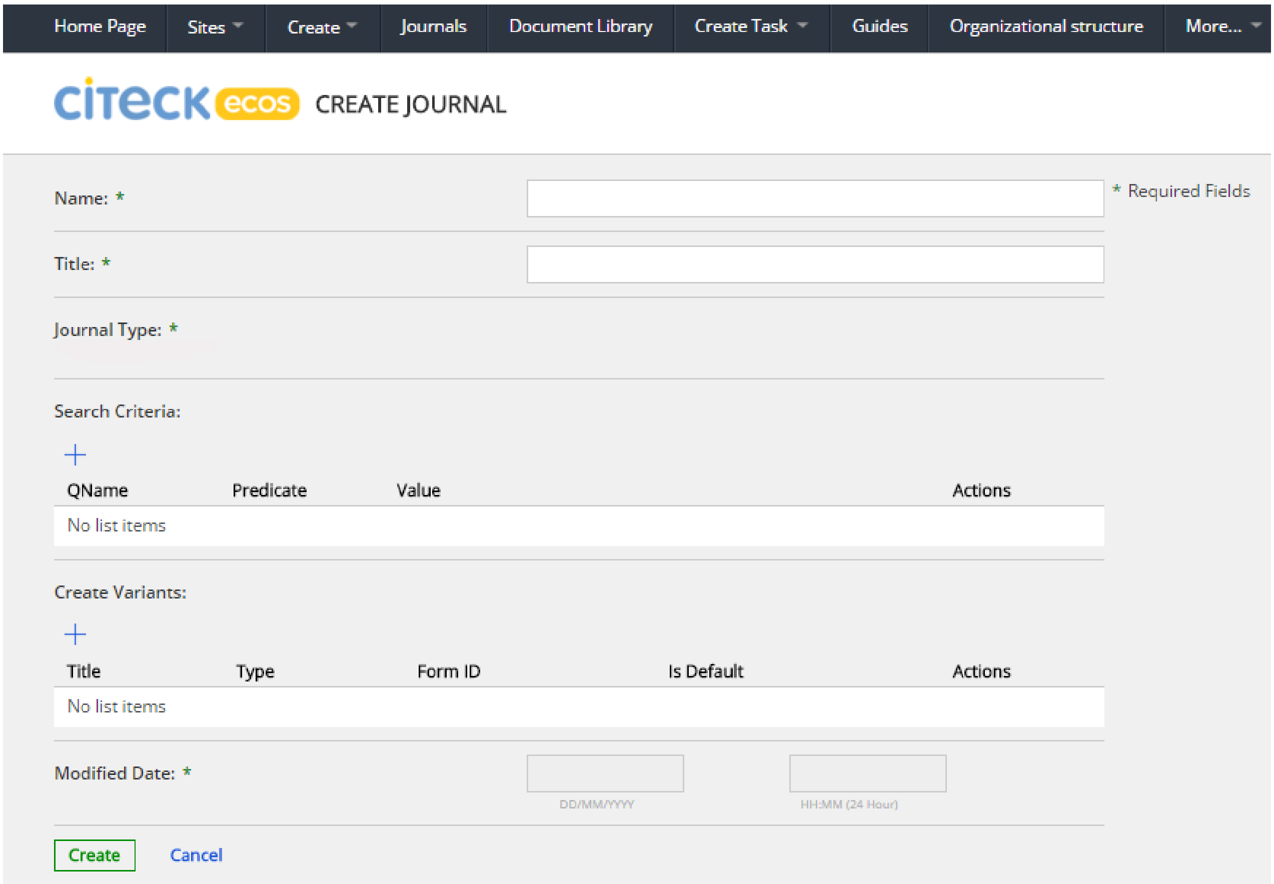
In the main menu press More -> Journal setup -> Journal lists.



List name	Value	Path
global-meta	Setting up, deleting, adding journals to the site	**More – Journal setup**
global-system	Journal for system setup, configuration	**More – System Journals**
global – templates	List for template management	**More – Templates**
global – tasks	List for task management	**More -> My tasks**
site-common-documents-main	List for **Common documents** site	**Sites -> Common documents -> Journals**
site-contracts-main	List for **Contracts** site	**Sites -> Contracts -> Journals**
site-letters-main	List for **Correspondence** site	**Sites -> Correspondence -> Journals**
site-meetings-main	List for **Meetings** site	**Sites -> Meetings -> Journals**
site-orders-main	List for **Orders** site	**Sites -> Orders -> Journals**

6.6.1. Editing journal.

To add journal from the predetermined journal list, in the **main menu** press **More** -> Admin tools -> **Journals setup** -> **Journals** -> in the opened journal press **+Create...** -> **Journal**



- **Name** – journal identifier;
- **Title** – user's journal name;
- **Journal type** – journal configuration identifier in share;
- **Search criteria** – determines what objects should be in the journal table;
- **Create variants** – determines creation of a new object.

To create new journal that is not in the system, use xml-file.

6.6.2. Adding journal to the site.

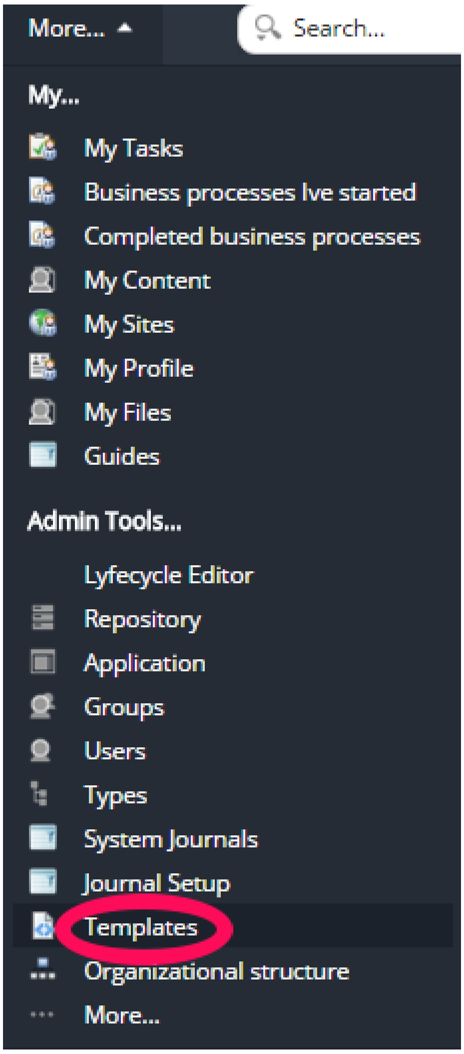
Journal list allows to group journals. In the system there are several created lists:

- Guides;
- Site journals (one journal per one site);

- Journal setup – to configure journals and filters;
- Tasks – to manage tasks;
- System journals – for system settings.

7. Templates.

To go to templates, in **main menu** select **More** -> **Templates.**



In the opened journal the following list opens:

- Case templates – for case-management feature;
- Auto numeration templates – for giving each document its unique ID in the system;
- Card templates – allow to get the file in a specific format according to the card properties;
- Card template types – for creating obligatory parts of approval route;
- Route templates – templates in .docx format, that are used to create document content;
- Document templates – for creating e-mails.

7.1. Card templates

To transfer to template creation, in main menu press More -> Templates -> Card Templates -> press +Create… -> Create card template.

The creation form opens, containing the following fields (obligatory ones are marked with *):

- **Name** – Template ID;
- **Template for** – document, case, object type that templates could be applied to (they also could be applied to children type);
- **Template type** – dividing templates by their usage;
- **Engine** – template engine that calculates the template;
- **File name template** – forming file name;
- **Content** – template in the freemaker format or other format (depends on the engine).

Press Create after you fill in all the fields.

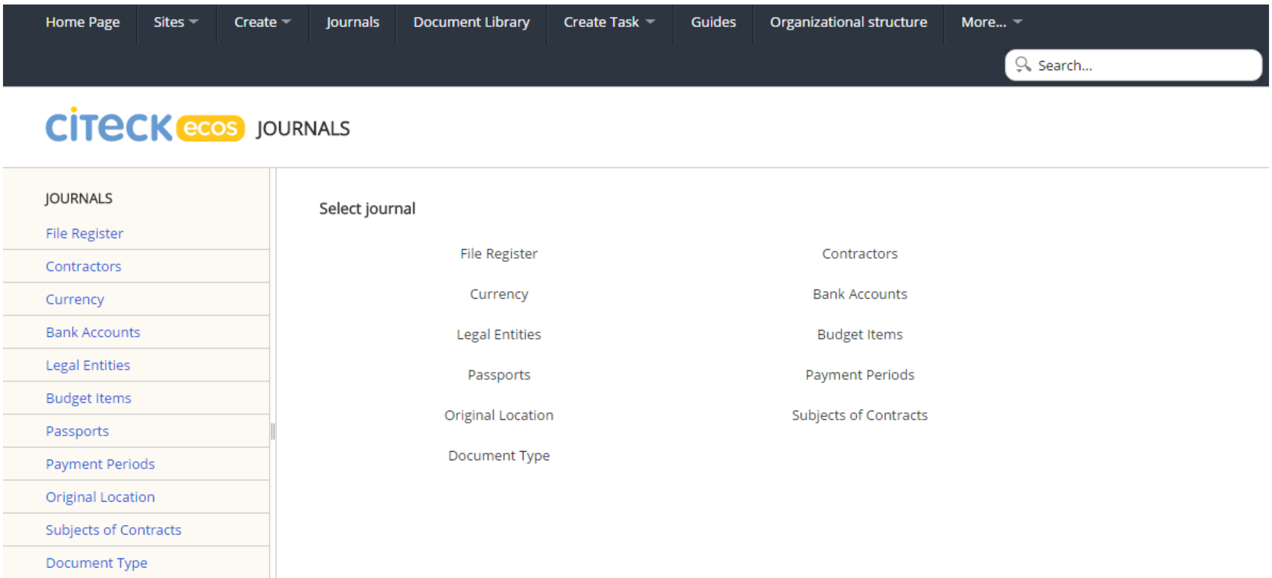
8. Data lists.

To transfer to Data lists, in **main menu** select **Data lists**.

System includes the following data lists:

- Bank invoices
- Contractor
- Currency
- Legal entity
- Document type

- Payment periods
- Passports
- File register
- Budget items
- Possible locations of source documents
- Contract items.

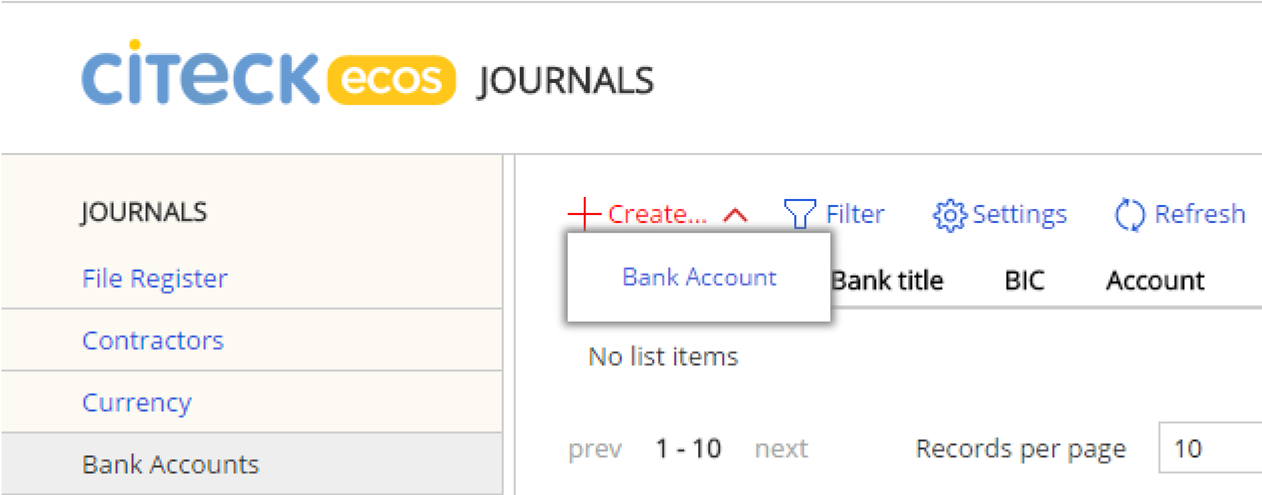


Data lists function the same as journals in the system. Read about journal functionality in the paragraph 6 of this document.

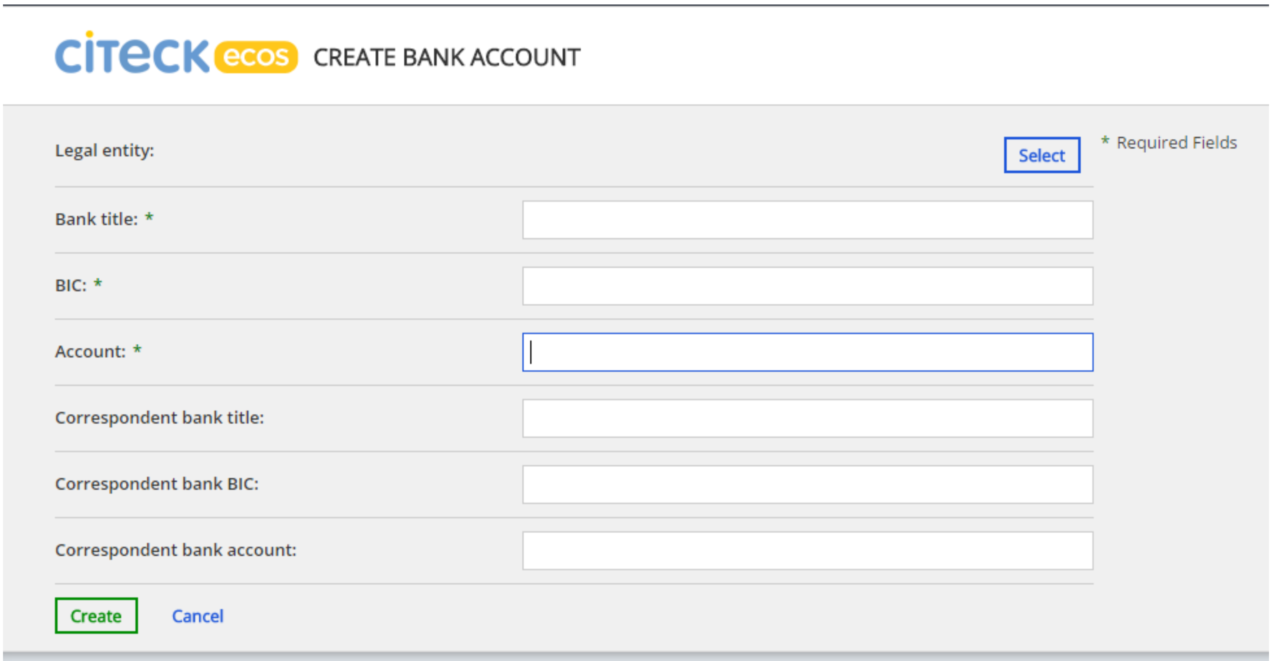
8.1. Creating data list entry.

To add the data list entry:

1. Select the data list.
2. In menu **Create** choose the created object.



3. In the opened form fill in obligatory fields (they are marked with *).

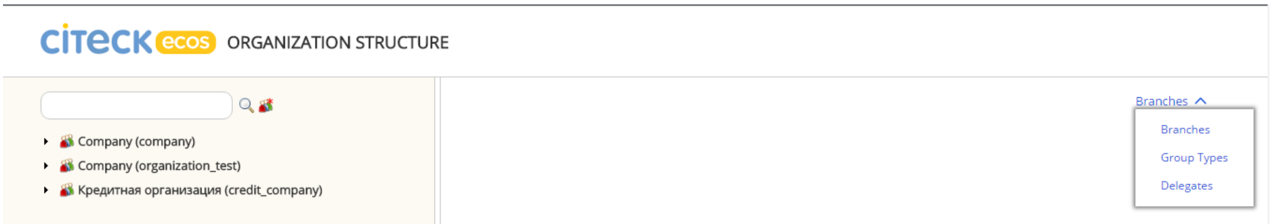


4. Press **Create**.

9. Organizational structure.

Select **Organizational Structure** in the **main menu**.

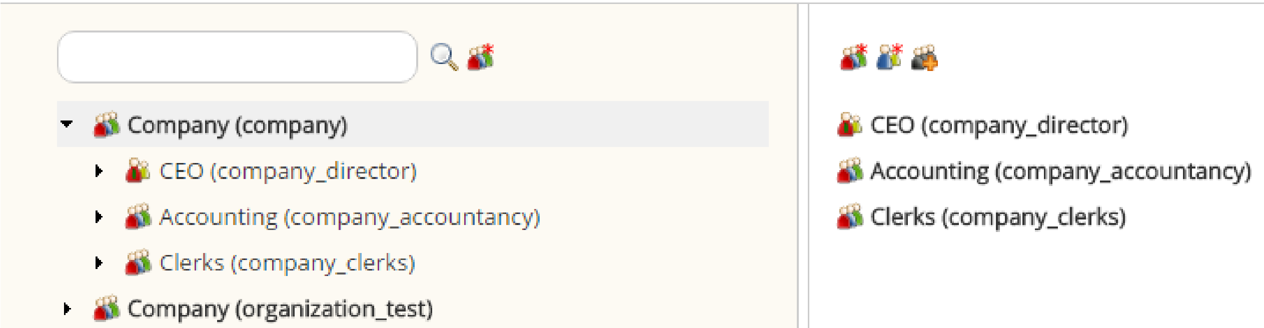
In the opened **Organizational structure** page, there are 3 sections: **Branches**, **Group types**, and **Delegates**.



Delegates

The page is divided in 2 parts:

- on the left, there is a hierarchical list of company's divisions and employees.
- on the right, there are branches, groups, and roles.



Branches are roles of the user groups.

To create a **branch** of the first (higher) level, press **Create subdivision** in the left part of the page.

Any branch may have these levels of hierarchy:

- Branches ( ).
- Roles (posts):
    - Standard role ( ).
    - Person in charge role ( ).
- Groups ( ).

To add new hierarchy level to the selected branch, press the corresponding button in the right part of the page. **Branches** and **Roles** are created, and **Groups** are selected from the already existing ones.

Adding users to a certain role falls under the same principle.

While creating an item for the branches, the following are necessary:

- Group ID (it may be edited after saving).
- Group name.
- Branch type (list of types is created in the **Group types** section).

While creating a role, the following are necessary:

- Group ID (it may be edited after saving).
- Group name.
- Role type (created in the **Group types** section).

There is an option to give control permissions to the role, for example, the permission to manually designate role substitutes.

To delete branches (or roles), press , to edit - .

Group types section

This section is for editing the list of branch types and roles.

To create new branch type press , appearing when mouse is over group type names (**Branch types** or **Role types**).

To delete the type - press , to edit - (appears when mouse is over type name).

When creating the new type (branch or role), put in the Name and Title.

For role type you could put in **Role in charge**.

10. Substitutes section

When the user is absent from the work place, his/her duties and tasks could be designated to other users. The substitute users have their current and future tasks available during that period.

After the absence period is over, substitution stops (the permissions give out during substitutions are taken away).

When the role is substituted, the permissions are given out only when all users who belong to that role are absent (there is an absence marker in the system).

Setting the Absent/In the office marker

The user could manually set his status to Absent or In the office.

If the user is absent, then he is marked with this sign: .

Setting up the substitutes

Substitutes could be set:

- for a role (could be set up by the administrator or users belonging to the role, if the role type allows substitutions control).
- for a user (could be set up by the administrator or user).

To set up the substitute for a user/role:

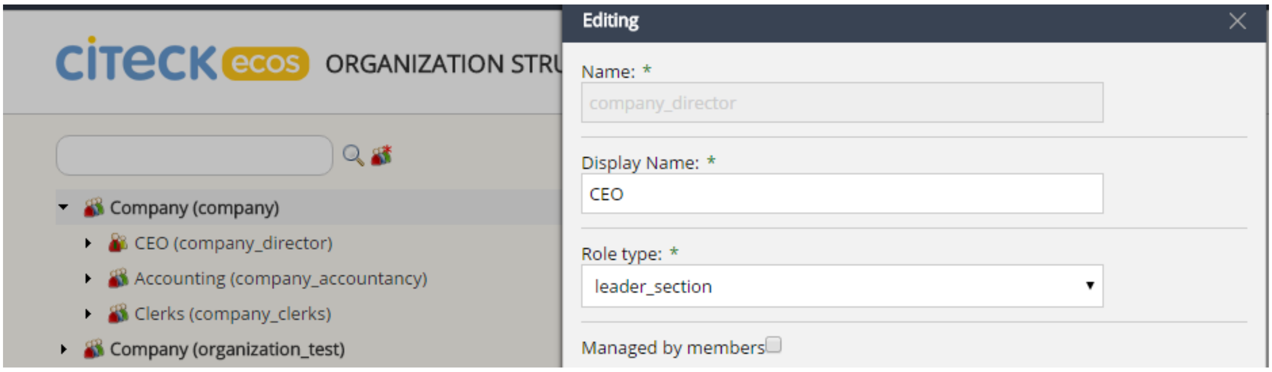
1. Go to the organizational structure.
2. Go to the **Substitutes** section.
3. Select the user/role from the list.

   At the right part of the page there will be users belonging to the role (the user is marked with:) and substitutes (marked with:). For users - only substitutes.

4. Press **Add user**.
5. In the opened form select the substitute user, press **Add**.

In order for the users belonging to the role to manually set the substitute for that role, the Administrator must mark that role as **Delegated by role members**:

1. Go to the organizational structure.
2. Go to the “Branches” section.
3. Select the role.
4. Edit the role by pressing **Edit**.
5. Mark the role with **Delegated by role member**s (or delete the marking, if you need to take away the permission to delegate substitutes from the user).
6. Press **Save**.



12. Files and folders in the system.

12.1. Creating a folder.

To create a folder, in **main menu** select **Sites** -> select any site -> **Document Library** -> press **+Create...** -> **Folder**

In the opened window New Folder fill in the fields -> press **Save**.

By default, created folder is available for every site user. Editing is available for the author, manager and employee.

12.2. Viewing folder.

To view the folder, in **main menu** select **Sites** -> **<Site Name>** -> **Document Library** -> select any folder from the table list -> press **<Folder name>.**

12.3. Uploading files.

Open the folder:

Main menu -> Sites -> **<Site Name>** -> **Document Library** -> select any folder from the table list -> press **<Folder name>.**

There are **2 ways to upload** a file:

- Through the link **Upload files;**
- Using **drag-n-drop** feature, by pulling the file into the window.