

The system of the electronic workflow management "DocumentLite"

The instruction for the system administrators

Services

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1.Introduction

This instruction of administrator describes the installation and setting of the system "DocumentLite" and is for administrators that realize the service and the support of work of the system electronic workflow management.

1.1. System of the electronic workflow management "DocumentLite"

The system "DocumentLite" created by the IT-company "Agamax" is for the process automation of the document passing to the organizations. The system is multi-user, gives the coordinate network of the staff. It depends on the installation of the system and its setting: the authentication of the system user, administration of access rights for the workable information, the supplying of integrity and safety of information. The system has a client-server interface and is on-stream in the local network. It allows supplying the following features:

- The organization of the optional, easy changeable quantity of workplaces that is defined by work volume, the kind of tasks that are solved, and the quantity of the needed staff.
- The effective protection of information integrity in the multi-user access.
- The supplying of information privacy on the basis of the administration of access rights

1.2. Server of the workflow management

For the system work "DocumentLite" it is necessary to have an individual PC headed by the operating system Windows and Linux with software:

1. [Apache](#) (versions not off 1.3.33) or или [IIS](#)
2. [PHP](#) (versions 4.X or 5.X, but not off 4.4)
3. [MySQL](#) (4.X or 5.X, but not off 4.1).

For the expedition of system work "DocumentLite" it is assumed the software Apache and PHP for one server, MySQL for another.

1.3. Administrators of the system "DocumentLite"

The system that a lot of users work with has to have a centralized administration. A special employee or employees perform this function. They make the interactive settings and the system administration. They are called the administrators.

The administrator performs the following functions:

- Making the work structure in the system and the registration of users.
- Creation of types of documents and attributes of documents.
- Appointment the rights of users.
- Creation of groups of users.
- Creation of lists of message references.

Besides the admin supplies the starting and the installation of workflow system server, the setting and the system service, the creation of the reserve copies of database and the recovery of the system work in case of glitch.

1.4. Installation and setting of "DocumentLite"

1. Unpack the archive of installation package.
2. Copy the files from the folder www to the home folder of your web server.
3. Create the MySQL database and the user for it with rights.
4. Realize script.sql in the created database.
5. Substitute in the folder user_params.php for yours:

\$db_server = "server MySql"; - usually localhost

\$db_login = "the user login db";

\$db_pas = "the password of user db";

\$db_name = "the name db";

\$file_root_path = './files/'; - the way to the folder, where files of documents will be kept, it is necessary to create this folder out of sight of WEB server. The way can begin with the folder index.php and end with slash.

\$file_lang = 'ru.php'; - the location file (they are kept in the folder lang)

\$dateformat = 1; - date format for displaying to users (1 = dd-mm-yyyy, 2 = mm/dd/yyyy, 3 = yyyy-mm-dd)

\$default_url = 'http://demo.upravdoc.ru'; - the address of the system "DocumentLite"

\$default_email_sender = admin@upravdoc.ru;- e-mail of "DocumentLite".

6. Restart the WEB server.

7. Setting is over. Enter the "DocumentLite" for check, entering the login root and password 1.

2. Menu "Directories"

Only administrators of the "DocumentLite" can enter this menu. If in the user utility it is noted the role "Administrator", he will get an additional menu "Help system" that members "User" can't enter.

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- [Types of documents](#)
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Let's consider each paragraph of the menu in details.

2.1. Types of documents

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[Add](#)

Name	Action
Contract	Change/Remove
Letter	Change/Remove
Special note	Change/Remove

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

Type a name of document in the following form and click "Add".

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Name:

The document was added. If it is necessary, you can change or remove it, clicking "change or remove" in the list of documents:

[Add](#)

Name	Action
Contract	Change/Remove
Letter	Change/Remove
Special note	Change/Remove

2.2. Group of document's attributes

In the system "DocumentLite" each document has the following dates: date of creation, name, type and files that users can add to the document. Any type of document can have different types of information that have to be kept and give the possibility to users to browse it. In the "DocumentLite" this kind of information is called the attributes of document. To enter these attributes there are the help system: attributes of documents, group of document's attributes, communications of group of document's attributes.

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

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[Add](#)

Name	Action
All	Change/Remove
all types of documents	Change/Remove
entering	Change/Remove
for contracts	Change/Remove
for service note	Change/Remove
group for all document	Change/Remove

Type a name of document in the following form and click "Add".

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Name:

The needed group of document's attributes will be created.

2.3. Communications of group of document's attributes

When types of documents and group of document's attributes were typed, it is necessary to take any type of documents from the groups. For that it is necessary to enter the paragraph "Communications of group of document's attributes".

The screenshot displays a web interface for document management. On the left, there are three main navigation sections: 'LISTS OF DOCUMENTS', 'CREATE', and 'DIFFERENT', each with a list of sub-items. On the right, there is a form with two dropdown menus: 'Group:' set to 'all types of documents' and 'Document type:' set to 'Contract'. Below these is a green 'Add' button.

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Group:

Document type:

Then it is necessary to choose a type of document that you enter and to click the button "Add". For example, in the picture the type of document "Contract" enters to the group "All types of documents".

2.4.Attributes of documents

For all groups of document's attributes it is necessary to type attributes. For that enter the paragraph "Attributes of documents" and click "Add". Type a name of attributes in the following form, choose the group, and types of dates.

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Name:

Group:

Type of data:

It is necessary to enter

There are the following types of dates:

Date - date;

String area - the text box with the multiline text;

String line - the text box with the one-line text.

If the field is obligatory for filling, tick off "Enter".

The attribute "due date" enters specifically. At first enter the attribute "Due date" of type Date.

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Name	Type	Group	Action
Performance date	Date	All	Change/Remove
Text	String area	All	Change/Remove
Due date	Date	all types of documents	Change/Remove

Then click for the attribute "Due date" "Change"..

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Name:

Group:

Type of data:

- It is necessary to enter
- Attribute of performance date

Change

Tick off "Attribute of due date" and click the button "Change".

After that the column "Due date" appears in the folder "On control" and in the folder "Accepted". You can consider a report about the delayed documents (the paragraph "Delayed documents").

2.5.Group of users

The groups of users are for convenient user choice and their keeping. Each user belongs to a group. To enter the user group it is necessary to enter the paragraph "Group of users" and to click the button "Add".

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Name	Parental group	Action
Accounting	root	Change/Remove
Management	root	Change/Remove
Support	root	Change/Remove
Sales	Support	Change/Remove
Technical	Support	Change/Remove

Choose the parent group and type the name of user group.

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Parental group:

Name:

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

The group root is the parent group of top level.

2.6. Users

To add users it is necessary to enter the paragraph "Users" and to click "Add".

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Name	Surname	Patronymic	Login	Group	Action
Alexander	Fedoseev		fedoseev	Technical	Change/Remove
Alexandr	Alexandrov	Alexandrovich	alexander	root	Change/Remove
Vasiliy	Vasiljev	Vasiljevich	vasiliy	Management	Change/Remove
root	root	root	root	root	Change/Remove

Choose in the following window the group, type surname, name and patronymic of user, login and password to enter the "DocumentLite", type the e-mail address and click "Add".

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Group:

root

Name:

Surname:

Patronymic:

Login:

Password:

E-mail:

Add

Click "Change" for the entered user.

<p>LISTS OF DOCUMENTS</p> <ul style="list-style-type: none"> ‣ Entering documents ‣ Created documents ‣ Documents on control ‣ Accepted documents ‣ Signed documents ‣ Archive <p>CREATE</p> <ul style="list-style-type: none"> ‣ Document <p>DIFFERENT</p> <ul style="list-style-type: none"> ‣ Search ‣ News ‣ Delayed documents ‣ Looking ‣ Exit <p>DIRECTORIES</p> <ul style="list-style-type: none"> ‣ Types of documents ‣ Attributes of documents ‣ Groups of documents' attributes ‣ Communications of groups of documents' attributes ‣ Groups of users ‣ Users 	<p>Group: <input type="text" value="Management"/></p> <p>Name: <input type="text" value="Vasiliy"/></p> <p>Surname: <input type="text" value="Vasiljev"/></p> <p>Patronymic: <input type="text" value="Vasiljevich"/></p> <p>Login: <input type="text" value="vasiliy"/></p> <p>Password: <input type="text" value="333"/></p> <p>E-mail: <input type="text" value="v7364@mail.ru"/></p> <p>Role: <input type="text" value="User"/></p> <p><input checked="" type="checkbox"/> Dispatch news by e-mail</p> <p style="text-align: center;"><input type="button" value="Change"/></p>
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Choose the role: user or administrator. As opposed to the user the admin can edit help systems. Tick off "Send news to email" to get news.

2.7. Dispatches

If the controller sends documents to the same users often, he can create groups of users - postings. For that it is necessary to enter the paragraph "Postings" and to click "Add".

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[Add](#)

Name	Action
Posting - 1	Change/Remove
Posting - 2	Change/Remove

Type the name of postings and click "Add".

2.8. Users of dispatch

This paragraph is for addition of users to the created postings. There will be the following window:

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Dispatch	User	Action
Posting - 1	Fedoseev Alexander	Change/Remove
Posting - 1	Vasiljev Vasilij Vasiljevich	Change/Remove
Posting - 2	Aleksey Alekseev Alekseevich	Change/Remove

Click "Add" to add a user.

Choose the name of posting and the needed user. Click the button "Add".

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Dispatch:

User:

It is possible to add any quantity of users to one posting.