

1. Introduction

logIQDoc™ is an electronic document management system of the next generation, which systematically manages and utilizes the unstructured digital information from inside and outside the company. It is designed for organizations with vast numbers of documents (files) that must be managed, shared and distributed.

The simple yet powerful features of logIQDoc™ automates and simplifies the management of documents throughout their entire life cycle (Capture, Create, Classify, Share & Protect, Retain, Archive and Destroy) of critical business documents and records. logIQDoc™ will also reduce your risk and costs associated with a growing number of regulatory compliance.

It makes searching, editing, sharing, and distributing documents easier than ever before. The familiar and Web-based interface of logIQDoc™ is easy to understand and use.

logIQDoc provides an organized and secure way to store, secure, manage, and share your documents.

Here are a few of the many features of logIQDoc™:

- Amazingly fast and accurate document searching;
- Document Version Control;
- Document based Workflow;
- Document Change Control and Change Notification
- Flexible, integrated security for documents and groups;
- Auditing capabilities;
- A powerful Document Distribution to both internal and external users;
- Import and Export tools;
- A powerfull encrypting algorithm to keep your documents safe and secure.

2. Basic Concepts

Please review this section to familiarize yourself with basic logIQDoc concepts. These concepts will be explained in detail in further but it will be useful to get a quick understanding now.

Domains

Domains (logIQDoc work areas) are root-level Groups. Domains are isolated environments in which a group of users can work, collaborate and produce documents. Access to domains is subject to security permissions. Only the members of domains can navigate inside domains or even see that they exist. Users and User Groups are assigned as "Members" to domains by the System Administrator and "Domain Administrators".

Groups

Groups are used to store and organize documents. Groups may contain any number of documents in a wide variety of file formats. Like domains, access to Groups is subject to security permissions. Users may be granted or denied access to individual Groups.

Documents

A document is any electronic file stored in logIQDoc. A document can be virtually any electronic file produced by familiar applications such as Microsoft Word, Microsoft Excel, Microsoft PowerPoint OpenOffice, Visio, or any other type of electronic file such as audio and video files. logIQDoc manages all types of electronic documents in their native format. In other words, it does not attempt to convert or interfere with document content.

Categories (Custom Properties)

Categories (Custom Property Sets) are user defined information sets that can be attached to Groups and documents. They are used to further define the document or group. A common use for this feature is to allow documents to be searched based on custom information, rather than just their name or content.

Content Searching

logIQDoc is capable of performing an internet-like search on documents and Groups based on their content. Various common file formats are indexed giving logIQDoc users the ability to search for documents based on their text content. You can use various third-party plug-ins called "**ifilters** " to broaden the range of file formats that can be indexed.

Version Control

logIQDoc retains multiple versions of a document. Every time a document is checked out, edited and checked back in, logIQDoc creates a new copy of this document and retains all previous versions. All versions are retained until the owner of the document or an authorized user decides to clean up previous versions. When you open a document, logIQDoc will always display the latest version of that document making it virtually impossible to accidentally work with an older copy. This feature allows you to revert back to older versions in case undesirable changes have been made to your documents.

3. Getting Started

Carefully review this section to get a quick understanding of the logIQDoc work area and the various tools that have been designed to help you successfully manage your content.

1. How to access logIQDoc

Accessing logIQDoc only involves typing a URL in your browser screen. The URL where logIQDoc is installed generally has the following format:

http://(machine_name)/logIQDoc where (machine_name) is the name of the server and logIQDoc is the default name of the virtual directory.

Please contact your administrator to find out the exact URL where logIQDoc can be reached.

When you type the correct URL to access logIQDoc, you will be greeted by the default portal. To gain full access to logIQDoc resources, you must log in by clicking on the "Login" link.

2. How to login to logIQDoc

Users who wish to gain access to resources such as authenticated domains and documents, must log in.

To log in as an authenticated user simply type in your username and password. If you do not have a User Name and Password, please contact the logIQDoc System Administrator.

At the pop-up login screen, enter the following:

- Enter your User Name
- Enter your Password

If this is your first time logging into logIQDoc, logIQDoc may prompt you to change your password.

Anonymous Access:

In the Anonymous (generic) mode, logIQDoc looks quite different and many of the most powerful functions are disabled. However, you can access "Anonymous Domains" without having to log in.

3. logIQDoc work area

The logIQDoc Document Library is designed to look and function similar to the Microsoft Windows Explorer™ and Microsoft Outlook™.

Group structure is displayed on the left, and files (documents) are displayed on the right.

To navigate effectively, take note of the following sections of logIQDoc. These are:

Document Management Tab:

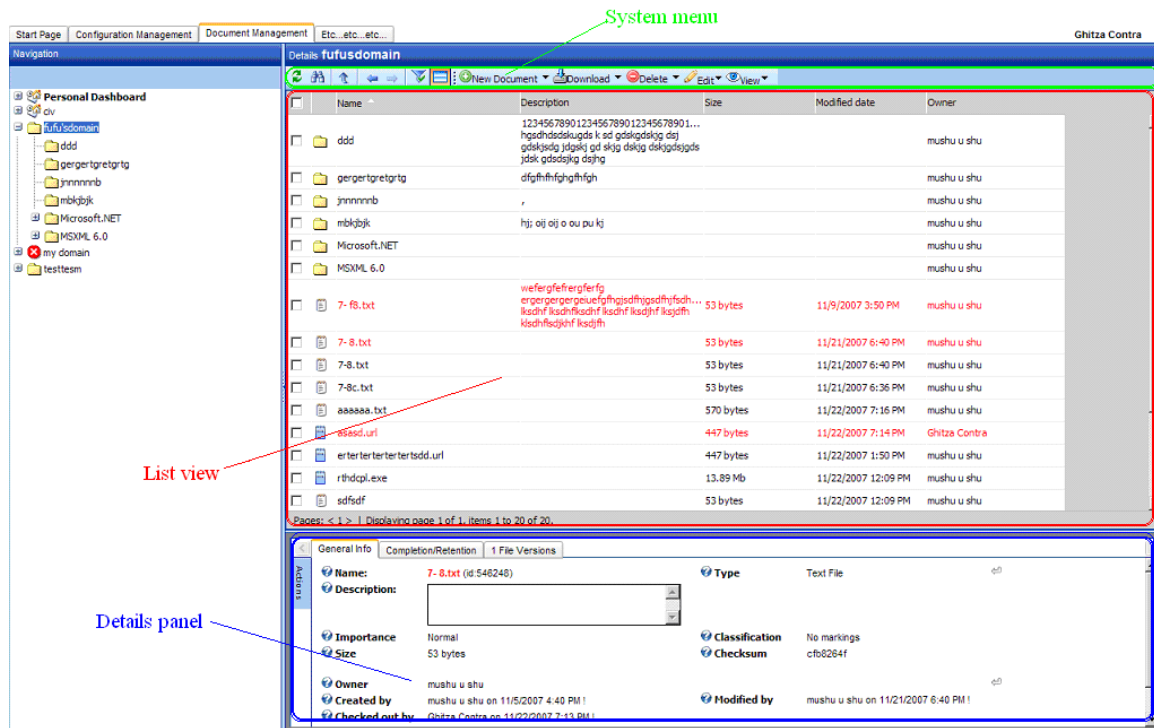
Clicking on this tab will navigate you to the logIQDoc Document Library. The logIQDoc Document Library is where you view, edit and create documents and groups.

Configuration Management:

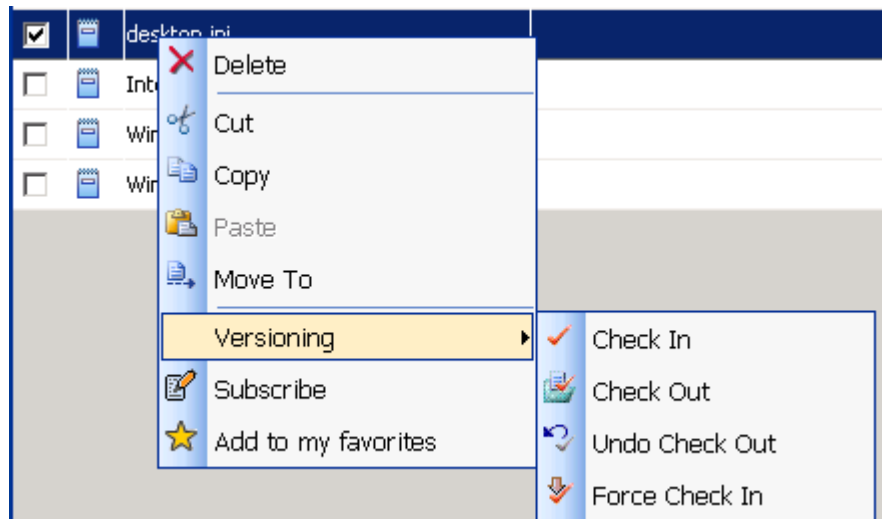
Clicking on this tab will get you to the Configuration Management. The logIQDoc Configuration Management is where you view, edit and create settings, users and roles. Only the System and Domain Administrators have access here.

4. The Menu System

This section describes the logIQDoc menu system in detail. Each sub-topic describes a main menu and all sub items in detail.



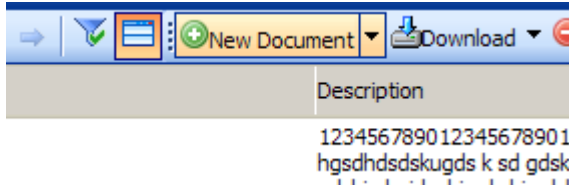
Note: The most used options from the main menu system can be accessed from the Contextual Menu. Just right-click on an item into the listview.



1. The New Document Menu

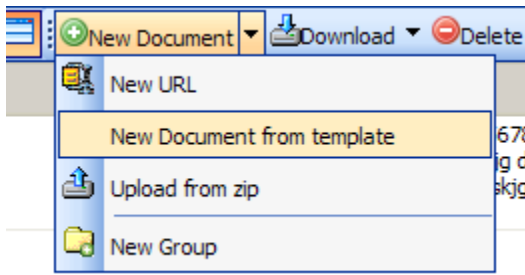
New Document (click directly on the button):

This command allows you to upload an existing document into logIQDoc. For more information on this topic, navigate to [Creating Documents](#).



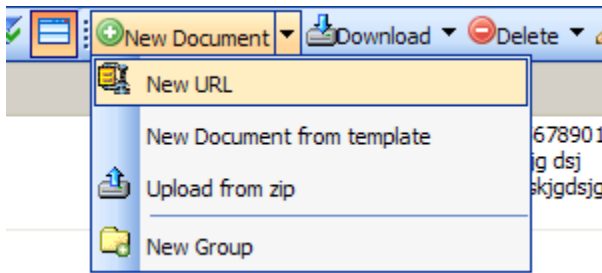
New Document from Template:

This option allows you to pick from a list available "Form Templates". For more information on this topic, navigate to [Using Form Templates](#).



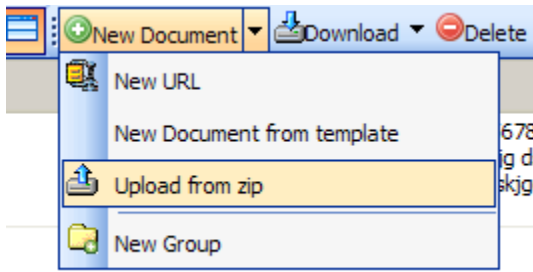
New URL:

This option allows you to create a URL document. For more information on this topic, navigate to [URLs](#).



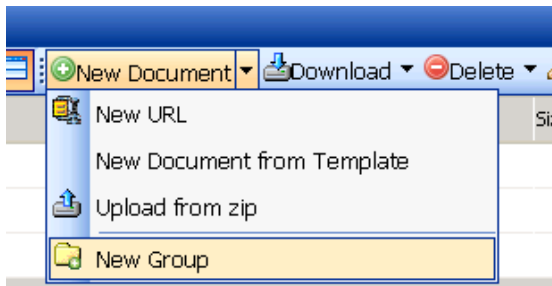
Upload from Zip:

This option allows you to create a URL document.
For more information on this topic, navigate to Using Zip Uploads.



New Group:

This command allows you to create a new Group. For more information on this topic, navigate to Creating Groups.



2. The Delete Menu

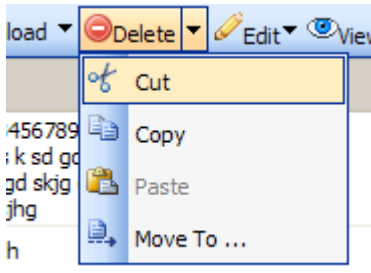
Delete (click directly on the button):

This command deletes the selected documents and groups.



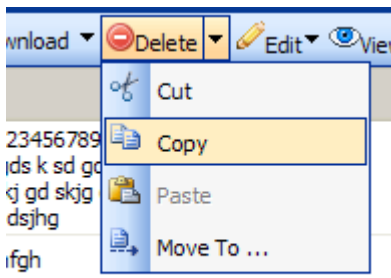
Cut:

This command creates a copy of the selected documents and groups. The copied items are placed in the clipboard. When the "Paste" menu item is clicked, the clipboard items are copied into the target group, the selected items are removed from their original location and finally the clipboard is emptied.



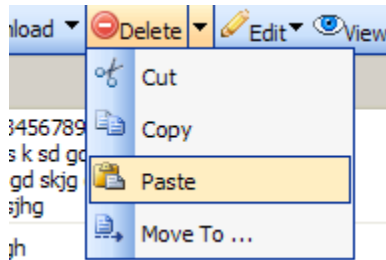
Copy:

This command creates a copy of the selected documents and groups. The copied items are placed in the clipboard. When the "Paste" menu item is clicked, the clipboard items are copied into the target group, the clipboard is emptied. The selected items remain in their original location.



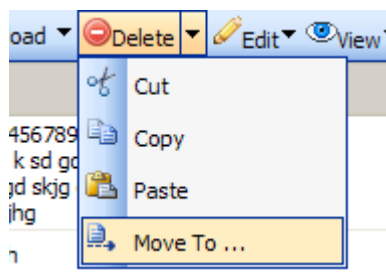
Paste:

This command copies the contents of the clipboard into the current group.

**Move to:**

This menu item executes the cut and paste functions but in a more direct and easier way.

It moves the current selected documents and groups to a specified location (location you can browse in the “move to” window).

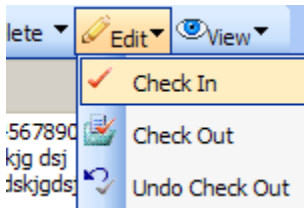


3. The Edit Menu



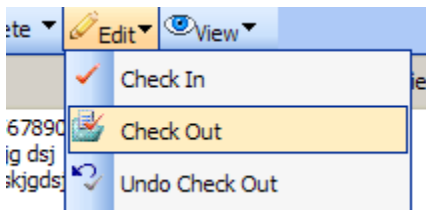
Check in:

Opens a window in which you can browse for your previously checked out and modified document (file on your filesystem) and uploads the document as a new version of the selected document. It can be done only if you have previously checked out the document.



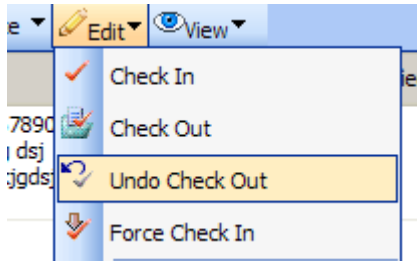
Check Out:

This menu item checks out the selected documents. If any of the selected items are groups, the contents of the groups are also checked out. As a best-practice, you should not checkout entire groups since there could be hundreds of documents.



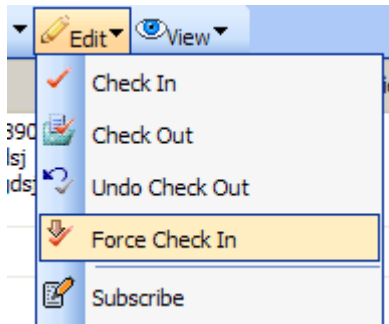
Undo Check Out:

This menu item performs an "Undo Check Out" operation on the selected documents and groups.

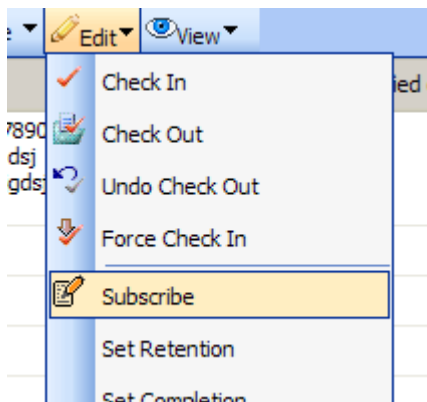
**Force check in** (available only if you have full control over the document):

Acts almost like a check in with the difference that the force checkin can be done even if someone else checked out the document.

It is useful in case a full-control user absolutely needs to make changes to the document even if it was already checked-out by another user.

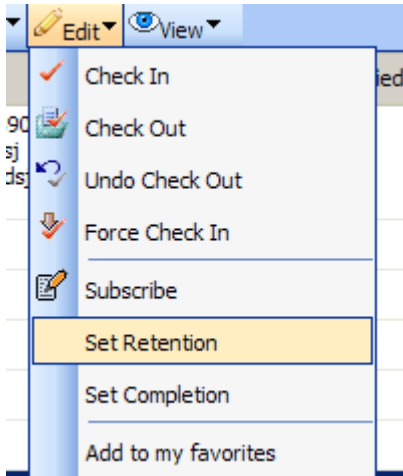
**Subscribe:**

Creates a subscription record for the selected items for the current user.



Set retention:

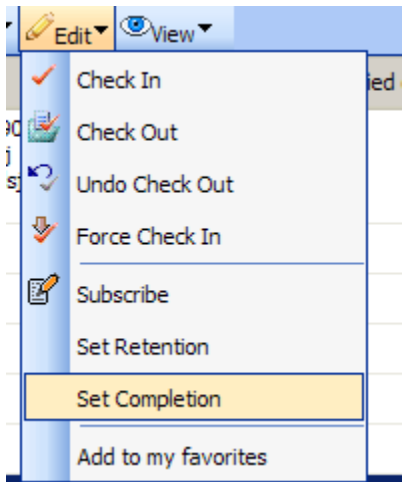
If you set this property then the document can not be deleted for the amount of time you specify.



Set completion:

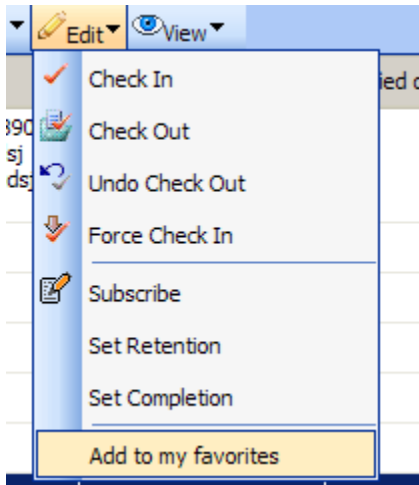
Here you can set how much of the document is complete.

If you set completion to 100% then the document can no longer be modified (unless you set completion again to a value below 100%).



Add to Favorites:

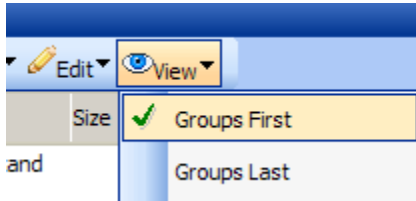
This menu item adds the selected documents and groups into the Favorites list.



4. The View Menu

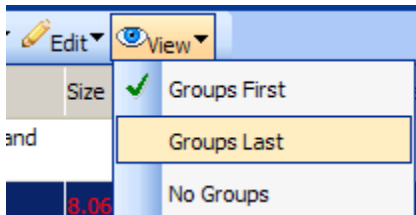
Groups first:

Select this option to view the groups first and the the documents last in the list view.



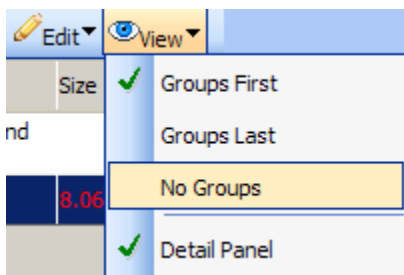
Groups last:

Select this option to view the documents first and the groups last in the list view.



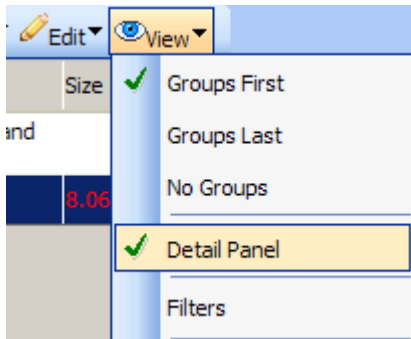
No groups:

Select this option if you don't want to see the groups in the list view (in this case you can navigate into the group structure only by using the navigation zone)

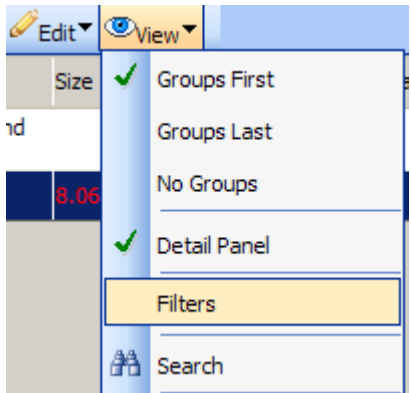


Detail panel:

Select this option if you want to see the details for the documents/groups in the panel below the list view.

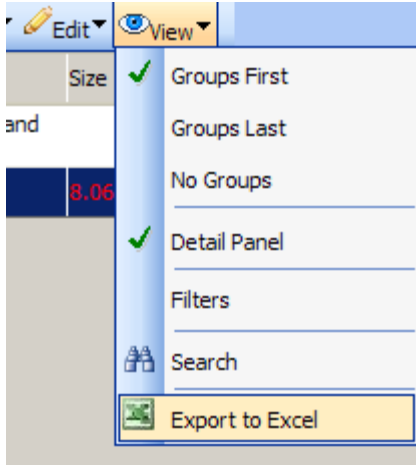
**Filters:**

Select this option to view the filters. You can filter the current list of documents and groups to see only the ones relevant for your work. Useful when you have many items in the list.

**Export to Excel:**

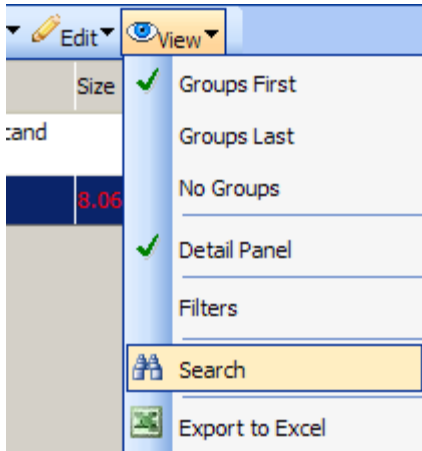
Select this option if you want to export the list with the documents and groups you see in the list view to an Excel document.

The export is complete, and considers all the pages of the list (not only if the viewable page)



Search:

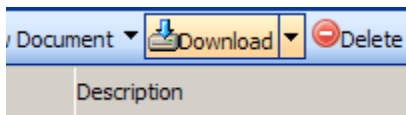
Select this option if you want to execute an advanced search.



5. The Download Menu

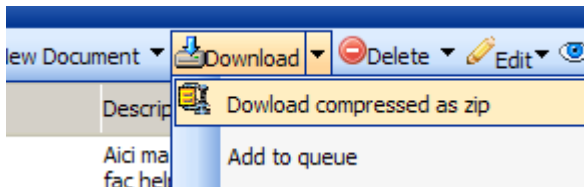
Download:

By using this command, you can download all the documents and groups selected. If you select more than one document or at least a group, the files will be packaged in a zip archive,

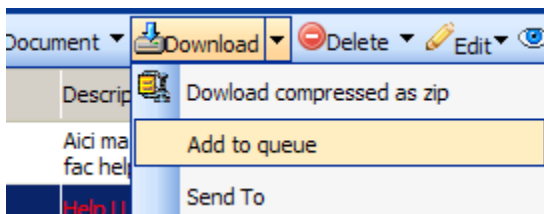


Download compressed as zip:

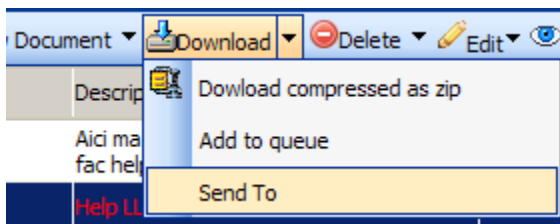
Downloads the selected documents and groups as zip archives. It is useful when you need to download a single big document archived as zip, which can reduce the time needed for the download to complete.

**Add to Queue:**

Places a shortcut of the selected documents and groups into the Download Queue for later downloading.

**Send to:**

Sends the selected documents to email recipients.



5. Working with Documents

Whether you work in words, pictures, audio, or video, logIQDoc can manage any type of document or file in its **native format**.

logIQDoc allows users to create, manage, share and distribute almost any form of electronic document using any desktop software or tool. Word processing documents, reports, forms, audio, video, artwork (any type of graphics), photographs, engineering documents, drawings and virtually any file format can be stored and managed in logIQDoc.

There are 3 types of documents in logIQDoc:

Regular Documents

Regular documents are typical files created by desktop applications such as Word, Excel, etc. Once they are created, they are uploaded to logIQDoc.

For more on this topic, see also [Creating Documents](#)

Template Documents

Template documents are documents created directly inside of logIQDoc by using Templates. Template documents are always of HTML type. These documents can be rendered with other templates making them very powerful.

For more on this topic, see also: [Form Templates](#)

URLs

URLs are also treated as documents. They can be created in any folder and they are used to point to external or internal web sites or pages.

For more on this topic, see also: [URL Documents](#)

Because all of these are treated as documents, they can be copied, moved, deleted, searched for, etc. They are all also subject to security.

1. Viewing Documents

To view the contents of a document

To view a document, simply double-click on the displayed document name in the list view, then choose "Open" from the dialog. The last version (if there are more versions of the document) will be opened

Downloading a document for offline viewing:

- To download a document for offline viewing, simply click on the displayed document link and then click on the download button from the system menu.
- The browser will prompt you for a location to download the document.
- Navigate to the desired location on your workstation and click "Save" to complete the download or click "Open" to open the document.
- If you want to download the document as a zip archive (to save time for big documents), use the Download as zip option.

Downloading Multiple documents for offline viewing:

If you would like to download multiple documents at one time, perform the following:

- Navigate to the group from which you wish to download documents
- Click on the check boxes to the left of the documents in the document list view
- Click on the "Download" button from the system menu.

logIQDoc will ZIP the selected documents and download them to your desktop.

In-Place Activation:

Your browser is capable of displaying the contents of certain types of documents inside your browser. This is called "In Place Activation". Depending on your browser configuration and your operating system, you may be able to control this default behavior.

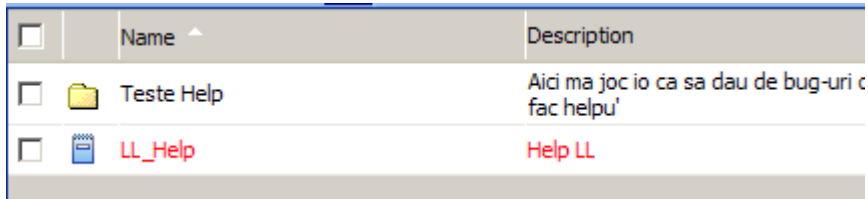
Typically Microsoft Internet Explorer™ will attempt to open Microsoft Word™ or Excel™ files inside of the browser.

2. Editing Documents

To edit a logIQDoc document, you must first check it out.

When you check out a document, logIQDoc locks the document to you but still allows others to view the document (if they have the appropriate permissions)

You can easily spot Checked Out documents because they appear RED in color in the list view.



<input type="checkbox"/>	Name	Description
<input type="checkbox"/>	Teste Help	Aici ma joc io ca sa dau de bug-uri c fac helpu'
<input type="checkbox"/>	LL_Help	Help LL

You can also see the list of all the documents checked out by you in your Personal Dashboard.

To check a document out, perform the following:

- Select the document(s) you wish to Check Out by clicking on the checkboxes located next to the documents.
- Once you make your selection, click on the "Check Out" menu item in the "Edit" menu.

A document can only be Checked Out to one user at a time. To edit a document, you must have at least "Change" rights to the document or be the owner of the document. More on this issue in [Document Security](#).

Now that the document is checked out to you, click on the document to download it to your workstation.

Once you make the desired changes to the document, you must "Check In" this document into logIQDoc. Checking In a document will release the document lock and create a new version of the document.

To check a document back in:

- Select the document by clicking on the checkbox, then choose the "Check In" menu item from the "Edit" menu.
- At the "Check In" window, click on the "Browse" button to navigate to the path where you downloaded your local copy and made your changes.
- Enter your comments for this version (optional)
- Update the "Percent Complete" information or set a "Completion Date" if you have completed this document. Note: marking a document as complete will disallow further edits to this document until the completion date is reset or the percent complete information is set to something other than 100% (optional).
- If you wish to release a new version of this document but continue to work on it, click on the check box labeled "Keep checked out" (optional).
- Click on the "Check In" button

Force "Check In" :

Force "Check In" is a special action that allows a user to undo a check out performed by another user. This action unlocks the checked out document, allowing other users to check this document out and make changes.

In order to be able to Force "Check In" a document, you must be the owner of the document, have "Full Control" rights, or be either the System Administrator or a Domain Administrator.

To Force "Check In" a document:

- Select a checked out document
- Click on the "Force Check In" button located in the "Edit" menu

Document ownership overrides all other security. Even though you may get an "Access Denied" message, as the owner of a document, you can always access the document security and give yourself FULL CONTROL. However, the System Administrator can change a document's ownership.

3. Version Control

One of the most common problems encountered in organizations with large numbers of documents is that of version control. All too often, multiple people are all working on a document at the same time.

The difficulty, of course, comes when they all try to save their changes. In such cases, whoever saves their changes last, "wins" and overwrites everyone else's work.

logIQDoc prevents this from happening by enforcing document integrity. In order to edit a document, you must first check the document out. While you have it checked out, other users will still be able to view the document, but they will not be able to edit it.

Note that checking a document out is subject to document security.

logIQDoc retains multiple versions of a document. Every time a document is checked out, edited and checked back in, logIQDoc creates a new version. It retains all versions until the owner of the document decides to clean up previous versions. When you open a document, logIQDoc will always display the latest version of that document making it virtually impossible to work with an older copy.

Viewing previous versions:

- Select the document by clicking on it.
- Click the File Version tab inside the details panel. This will show a list of the different versions in the details panel.

Pages: < 1 > Displaying page 1 of 1, items 1 to 2 of 2.			
General Info			
Completion/Retention			
4 File Versions			
Actions	No	Name	Size
	4	LL_Help__Help_LL.doc	8.06 Mb
	3	Help LL.doc	8.06 Mb
	2	Help LL.doc	8.01 Mb

- Select the specific version from the list.





- Double-click on the document version you wish to view/download

Restoring a Document to a Previous Version:

- Check the document out.
- Click the File Version tab inside the details panel.
- This will show a list of the different versions in the details panel.
- Select the specific version from the list.
- Double-click on the document version you wish to restore.
- When prompted to view or save the file, select save and save it to your workstation.
- Click on the "Check In" button in the "Edit" menu.
- When prompted for a new version of this document, select and upload the previous version you saved to your desktop.
- This will effectively take the older version, and check it back into the system, making it the new latest version.

Deleting Versions:

- Select the document.
- Click on the "File Versions" tab in the details panel. This will display all document versions.
- Select the specific version from the list (optional).
- Click on the trash icon to the right of the version to delete the version.

Name	Size	Created by	Created date	Version Comment	
LL_Help_Help_LL.doc	8.06 Mb	cmanea	12/4/2007 12:43 PM		
Help LL.doc	8.06 Mb	cmanea	12/4/2007 12:43 PM		
Help LL.doc	8.01 Mb	cmanea	12/4/2007 12:43 PM		
Help LL.doc	7.93 Mb	cmanea	12/4/2007 12:43 PM		

4. Creating Documents

There are several different ways to create documents in logIQDoc.

1. *Upload an existing document into an logIQDoc group*
2. *Use an HTML Form and a Document Template to create a document inside logIQDoc*
3. *Use Zip Upload to upload multiple documents at once*

1. Uploading an existing document into logIQDoc

- Navigate to the group where you would like to store your document.
- Click on the "New Document" Menu from the system menu
- In the "New Document" Window, click on the "Browse" button to navigate to the path of the existing document
- If the filename the filename is not the same name of the document, you can modify it (you will receive a warning message)
- Enter a short description that describes the contents of this document (optional but recommended)
- Enter a version comment (optional). This allows you to have a version-related comment.
- Enter a "Percent complete" in order to trace the estimated completeness of your document. Note: Marking a document as complete (100%) will disallow further edits to this document until the completion state is reset (the percent complete information is set to something other than 100%) (optional).
- By default, an email notification will be sent to the subscribers of the group when this document is uploaded.
- If you do not want anybody else to see your document simply check the "Is hidden" checkbox.
- You can now click the "Finish" button to upload your document into logIQDoc or you can click the "Next" button to set the appropriate permissions regarding this document (NOTE: if you do not set any custom permissions, the permissions of the parent group will be inherited)

2. Use an HTML Form and a Document Template

- Navigate to the group where you would like to store your document.
- Click on the "New Document" Menu
- Choose the "Document from Template" menu item
- A pop-up window will appear that displays a list of template documents to choose from
- Choose a template from the list and click "Ok"
- The chosen form template will appear prompting you for the form fields.
- When finished, choose the format in which you wish to save the generated document and then click on the "Submit" button (this depends on the form designer's preference) to submit your document.
- A new window will appear prompting you for a Name and Description for the new document
- Enter a Name and a Short description that describes the contents of this document (optional but recommended)
- Enter a comment (optional).

3. Use the Zip Upload utility

*See next chapter

5. Creating Documents with Zip Upload

- Navigate to the group where you would like to store your document(s).
- Click on the "New Document" Menu
- Choose the "Upload from zip" menu item
- At the "Zip Upload" window, click on the "Browse" button to navigate to the path of the zip file you wish to upload.
- Click on the "Upload" button to upload the zip file into logIQDoc.

The zip file will be uploaded and automatically expanded on the server.

All the files in the zip file will be extracted in the target logIQDoc Group.

Security considerations:

In order to be able to create documents, you must have at least "ADD" rights in the group in which the document is to be created.

An important thing to remember is that the new document (by default) will inherit the security permissions from the group in which it is created. So if you would like to change or assign a different security go to Document Security.

6. *Creating Documents with Form Templates*

- Navigate to the group where you would like to store your document.
- Click on the "New Document" Menu
- Choose the "Document from Template" menu item
- A pop-up window will appear that displays a list of template documents to choose from
- Choose a template from the list and click "Ok"
- The chosen form template will appear prompting you for the form fields.
- When finished, choose the format in which you wish to save the generated document and then click on the "Submit" button (this depends on the form designer's preference) to submit your document.
- A new window will appear prompting you for a Name and Description for the new document
- Enter a Name and a Short description that describes the contents of this document (optional but recommended)
- Enter a comment (optional)

7. Deleting Documents

Users with appropriate permissions can delete logIQDoc documents. Document owners, users with "Full control" rights, Domain Administrators and the system administrator may delete documents.

A document will not be deleted if:

1. The group rules does not allow document deletes
2. The retention date is set and greater than the current date.
3. The document is marked as Vital.
4. A checked-out document cannot be deleted

However, deleting a document is not a permanent action. Deleted documents may be recovered because they are not actually deleted but rather sent to the "Recycle Bin". Deleted documents are sent to the Recycle Bin of the user who has performed the "delete" action.

The user who deleted the document can recover deleted documents by navigating to his or her recycle bin. The System Administrator may also recover documents deleted by anyone.

Note:

If you choose to empty your recycle bin, the documents will be moved further more to the domain recycle bin. Only after the administrator deletes the documents from the domain recycle bin, it will be physically eliminated from the database. At this point the document is not recoverable from within the system (but still potentially recoverable from the backups.)

To delete a document, perform the following:

- Click on the check box to select a documents and groups.
- Click on the "Delete" button in the system menu.
- Confirm that you wish to delete the document.

It is important to empty your recycle bin from time to time, because deleted documents occupy just as much disk space as regular documents. The System Administrator has

access to everyone's "Recycle Bin" so if they need to recover disk space, they can choose to purge users' deleted documents and groups.

8. Recovering Deleted Documents

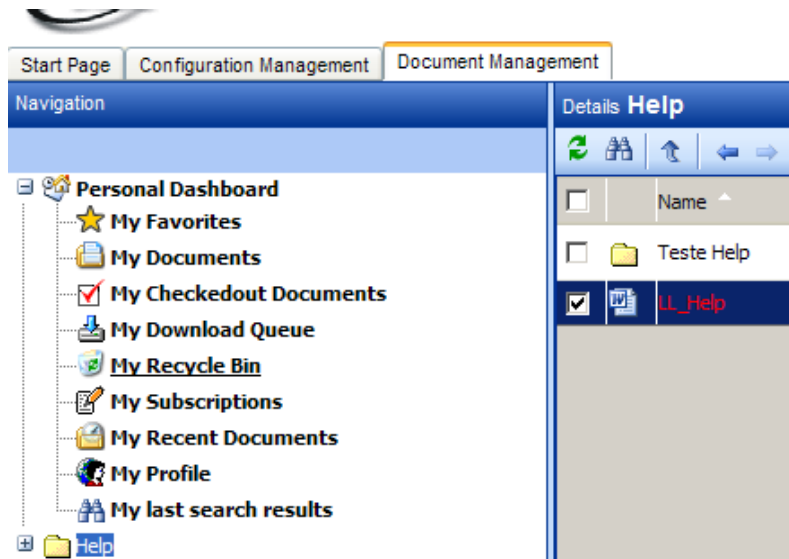
Deleted documents are placed in a special location in logIQDoc called the Recycle Bin. Every logIQDoc user has a unique recycle bin that keeps the documents that have been deleted by that user.

logIQDoc users can only see the contents of their own recycle bin however.

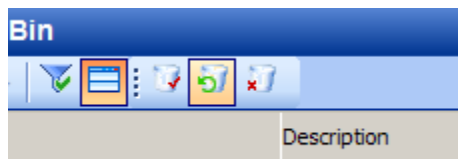
The System Administrator can search through every recycle bin to recover documents. If one of your documents is deleted by another user, only the user who deleted this document or the System Administrator can recover this document.

If you delete a document and wish to recover it, perform the following:

- Click on the "My Recycle Bin" link located in your personal dashboard tab



- Now you will see a list of the documents you have deleted in the list view panel.
- Select the document you wish to recover and click on the "Restore" button.



- You will be prompted to choose a group to restore the deleted document.
- Select a group and confirm your action.

The document will be restored with all its original information including its versions.

Note:

If you delete an entire group, when you click restore, the group will be restored and the internal structure of the group will be maintained.

Warning:

If you "empty" your Recycle Bin, you will lose all recovery information and will not be able to restore your deleted documents without help from the System Administrator.

9. Completing Documents

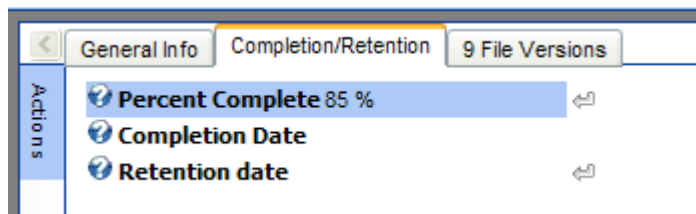
logIQDoc allows authors and other authorized users to set completion levels to documents.

This feature is important because:

- It lets other users know the completion level of a document.
- It can be used as a tracking method for the progress level of an individual document or group of documents.
- When completed, it locks the document and prevents further edits.

To set a completion level on an existing document, perform the following:

- Select the document.
- Go to the details panel and click Completion/Retention tab.



- Set the "Percent Complete" section to something other than "0".
- If the document is completed, set the "Percent Complete" setting to 100.
 - Notice that, the "Completion Date" section will automatically be set to the current date.

To set a completion level on a document, during "Check In":

- The "Check In" window includes "Percent Complete". By setting this to the appropriate value, you can mark a document as completed as you "Check In" a new version of the document.
- Set the "Percent Complete" section to something other than "0".
- If the document is completed, set the "Percent Complete" setting to 100.

To set a completion level on a new document, perform the following:

- You may wish to upload a document into logIQDoc and mark it as complete at the same time. For this purpose, the "New Document" screen includes the "Percent Complete".

- Select the "Upload" option from the "New Document" menu.
- Select a document to upload by clicking on the "Browse" button.
- Set the "Percent Complete" section to something other than "0".
- If the document is completed, set the "Percent Complete" setting to 100.

10. Copying and Moving Documents

You may copy and paste a document to create a new instance of into in the same or other group. Similarly, you may move a document by cutting it from one group and pasting it into another group.

To copy a document, perform the following:

- Click the checkbox next to the document to select it.
- Click on the "Copy" menu item in the "Delete" menu.
- Navigate to the target group where you wish to paste the copy of the document.
- At the target group, click on the "Paste" menu item in the "Delete" menu.

To move a document, perform the following:

- Click the checkbox next to the document to select it.
- Click on the "Cut" menu item in the "Delete" menu.
- Navigate to the target group where you wish to paste the document.
- At the target group, click on the "Paste" menu item in the "Delete" menu.

Security considerations:

In order to be able to cut and paste a document, you must have "Full Control" rights on the document and you must also have sufficient rights in the target group to create a document.

In order to copy a document, you must have "Download" rights to the document. You cannot copy documents for which you do not have "Download" privileges.

11. Classifying and De-classifying Documents

As a default, when a document is created, it has the classification level of "No Markings". Users may classify documents according to the following Classification Levels

- Confidential
- Secret
- Top secret

A document once classified can be "De-classified"

To classify a document, perform the following:

- Click on the "General Info" tab located in the details panel.
- Click on the first "Edit" icon of the section labeled "Classification Level"
- The "Document properties" window will appear.
- Select an appropriate "Classification Level" from the drop down control.

Note:

Similarly, the same set of instructions can be followed to de-classify documents or set a different classification level.

Security considerations:

In order to classify documents, the group in which the document lives must allow classified documents. Also, "Full Control" rights are required to classify and de-classify documents.

Important:

If a document is marked "Top secret" all the implicit permissions are removed. NOT even the administrator can access the document. The document can be accessed only by users with explicit permissions.

All actions regarding classifications and de-classifications are logged.

12. Document Properties

To view the properties of a document, go to the details panel. The panel is divided into three grouping tabs.

The "General info" tab.

Name:

Name of the document

Note: You should not name documents using any of the following special characters.

(\ , / , : , * , ? , " , < , > , |)

Description:

Description of the document

Type:

Type of document or extension

Created by:

Who created the document and the creation date of the document.

Owner:

The owner of the document.

Modified by:

The user who modified the document and the date and time of last modification (if any).

Size:

Document size (in bytes, kb or Mb)

Importance:

Importance level assigned to the document

Note

If the document is marked vital then that document can't be deleted from the system.

Classification Level:

Classification level refers to the level of sensitivity or secrecy assigned to the document.

Supported Classification levels are:

- No markings
- Declassified
- Confidential
- Secret
- Top Secret

Important:

If a document is marked "Top secret" all the implicit permissions are removed. NOT even the administrator can access the document. The document can be accessed only by users with explicit permissions.

Keywords:

Displays the existing keywords associated with the document (if any). Use the keywords if you want your document to be searchable for those word (beside the effective content of the document)

Checksum:

It is a unique identifier of the version. If the checksum is identical then the files are identical.

The completion/retention tab:

Percent Complete:

Document state.

If this attribute is set to 100%, the "Completion Date" attribute will automatically be set to the current date. When this is done, the document will be considered complete and logIQDoc will prevent edits to this document.

Completion Date:

Date and time of when the document was marked complete.

Completed documents cannot be checked out and modified. This attribute cannot be set. It is automatically set when the Percent Complete attribute is set to 100%.

Retention Date:

The date until which the document needs to be retained.

If this attribute is set, it will prevent users from deleting this document (or versions of it)

until this date or until this date is altered. However, for completed documents you cannot set this date less than the implicit calculated date based on group rules for retention

13. Distributing Documents

You can send a logIQDoc document to by email by using the "Send To" function. If you wish to send a logIQDoc document as an email attachment or as a link into the system, use the "Send To" function.

To do this, perform the following:

- Click on the "Send To" menu item located in the "Download" menu from the system menu.
- Enter the email address of the intended recipients separated by semicolons, or click on the "..." button to display a list of logIQDoc users in your domain.
Note: You may also include email addresses of individuals who are not logIQDoc users.
- Type in a subject for the email.
- Click on the "Send" button to send the email.

Important: you can choose to send documents as links to the logIQDoc system. A link will be embedded into the email body, allowing authenticated users to download the document by clicking on that link.

The administrator can restrict to sending email ONLY as links (this way no important confidential documents will be stored on some email-server that you don't have control on)

If you wish to send a logIQDoc document as a link or as an attachment just check the checkboxes.

14. Publishing Documents

You can publish your documents so that somebody who isn't a logIQDoc user can see documents from within logIQDoc.

To publish a document:

- Select the document from the list view;
- Click on the Actions button from the Details Panel;
- Click Publications;
- In the Publications view, click Publish;
- In the Document Publications view fill in the user/password data (this is used to identify the person(s) to whom you wish to publish the document);
- Click the Save button.

You can also select when the document is published (by setting the begin and end dates), if the password is also sent the the same mail (or you can transmit it yourself – for security reasons) and which version of the document is published.

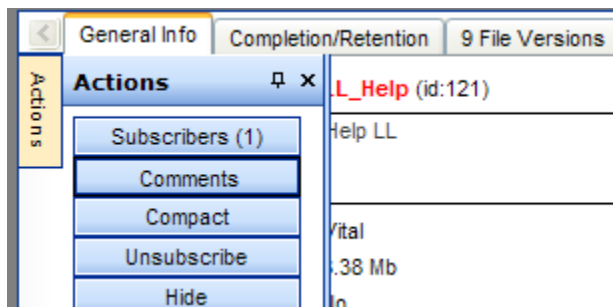
15. Document Comments

To attach comments to a document, you must have (at least) "Read" permissions to that document.

These comments act as a mini-forum, with the document as "topic". You can add comments that other users can reply to.

To attach Comments to a document:

- Click on the "Comments" button in the "Actions" menu of the document you wish to attach a comment.



- The "Add Comment" window will appear.
- At the "Comments" window, click on the "Add" button.
- Add your comment.
- Click "OK".

To delete a document comment:

You may delete comments if you own the document or if you have attached the comment.

- At the "Comments" window, click on the "Delete" button next to the comment you want to delete.

Version Comments:

Version comments are entered at the time of first publish and subsequent check ins. Only users with access to change the document can enter these comments. They are mainly used to create notes about the specific version, and not the document in

general.

16. Document Keywords

Keywords are used to assist users in searching and finding documents.

Although generally intended for image type documents, keywords can be applied to any type of document. The advantage of assigning keywords to image type documents are obvious because images cannot be indexed for content (but only for the metadata attached to the file)

Examples of keywords:

- You can assign keywords to images that cannot be indexed for text content.
- You can assign keywords to documents that normally do not contain a specific word but is still related.

Example:

A document describes a financial transaction but does not contain the words "money", "profitable" etc. By adding these keywords manually, users will be able to find this document without having to specify an exact match against the document.

A document may not include the name of a customer but by specifying it as a keyword, you will be able to find this document.

To add a keyword, perform the following:

- Select the document
- In the Details Panel select the General Info tab.
- Click the Edit button next to the Keywords section.
- The "Document Keywords" window will appear.
- Add a new keyword and click on the "Add" button.
- Click Save when you have finished adding keywords.

17. URLs

URLs can be created in any group and they are used to point to external or internal web sites or pages. URLs are treated as documents.

To create a URL document, perform the following:

- Navigate to the group in which you wish to create a URL document.
- Click on the "New URL" menu item in the "New Document" menu.
- The "New URL" screen will appear.
- Enter a name for the URL.
- Enter a description for the URL.
- Enter the URL path, e.g. www.atypIQSoftware.ro.

Notice that the "Name" of the URL will appear in the document list, not the actual URL path.

It's not necessary to include the "http://" in the URL path. Also, do not give the URL name an extension such as .url -- an extension will be created for you.

18. Document Ownership

When authenticated users with proper security permissions create documents/groups, they become the owner of the documents/groups they create.

Authors can adjust the security permissions of their documents/groups. This is allowed because they are the owners of their documents/groups. In other words, it is assumed that they have "Full Control" rights on the document/group.

To better understand how ownership and security are related, consider the following:

A security check may be performed on documents/groups for many different reasons. For the purposes of this section, let's assume it is clicked for viewing.

The following checks are performed in the order in which they are described.

- Document security is read and an "Access List" is formed
This list consists of Users and User Roles with their assigned security level
- The current user is then searched in the "Access List" by name
- If the current user is NOT Found in the "Access List" by name
 - The User Roles in the "Access List" are enumerated (expanded)
 - The current user is searched in the enumerated list
 - If the user is not in the enumerated list, then it is checked to see if the current user is the owner of the document
 - If the current user is the owner of the document, the operation is granted.
- If the current user is found in the "Access List" by name, the associated security level is obtained.
- The assigned security level is compared against the attempted operation and the operation is either granted or rejected.

In this case, the user may get an "Access Denied" message even though he/she may be the document owner. However, ownership brings with it, a special right.

As the owner of a document, this user may navigate to the "[Document Security](#)" window and take out his/her from the "Access List" thereby giving himself/herself "FULL CONTROL" once again.

The only way to prevent a document/group owner from accessing or controlling their documents/groups is for another user to take ownership of the document/group.

To take or transfer ownership of a document/group, perform the following:

- Click on the "General Info" tab located in the Details panel.
- Click on the "Edit" button located next to the section labeled "Owner".
- The "Document Ownership" window will appear.
- Click on the "Take ownership" button to make yourself the new owner.

Note:

The Edit button appears only if you are not the owner of the document/group.

Security considerations:

To take or transfer ownership, you must have "Full Control" rights or be the owner of the document.

19. Download Queue

The download queue is an area where you can place documents for future downloading.

Although you can download multiple documents directly from a group simply by selecting multiple documents and clicking on the "Download" menu item, the "Download Queue" allows you to navigate to a series of different groups and select documents for downloading.

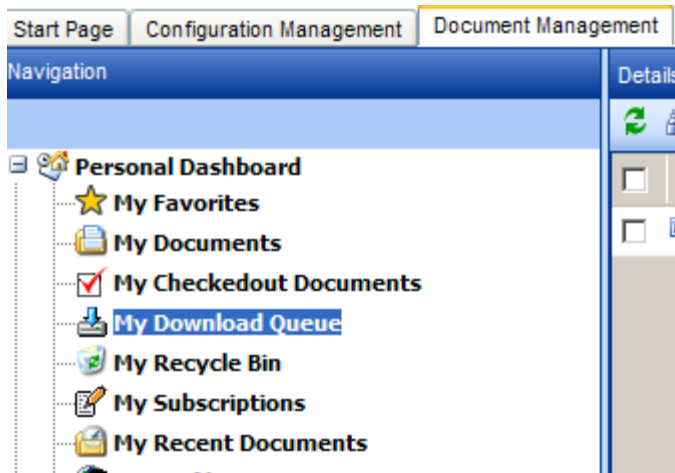
Once you are ready to download your selections, you can navigate to the "Download Queue" to begin the download transfer.

How to add documents to your download queue:

- Select your documents by clicking on the checkboxes located to the left of your documents.
- Click on the "Add to Queue" menu item under the "Download" menu.

How to begin the download transfer of documents from your download queue:

- Now that you have added your documents to your queue, you can navigate to your download queue to download your documents.
- Navigate to your personal dashboard.
- Click on the "My Download Queue" link located in your dashboard.



- In this screen, you can pick all or a partial list of documents to download.

- Once you make your selection, click on "Download compressed as zip" menu item located under "Download" menu

Items downloaded from the "Download Queue" are always downloaded in Zip format.

Documents placed in the download queue will remain there until you choose to remove them.

6. Working with Groups

Groups in logIQDoc are used to store and organize documents and work much like the folders in your Windows File Explorer™, or the folders in your filing cabinet. They are simply containers that hold documents and other sub-groups. Groups can contain any type of electronic document which can be stored in logIQDoc, which means basically everything. Groups are also subject to their own security settings. That is, users may be granted or denied access to individual Groups.

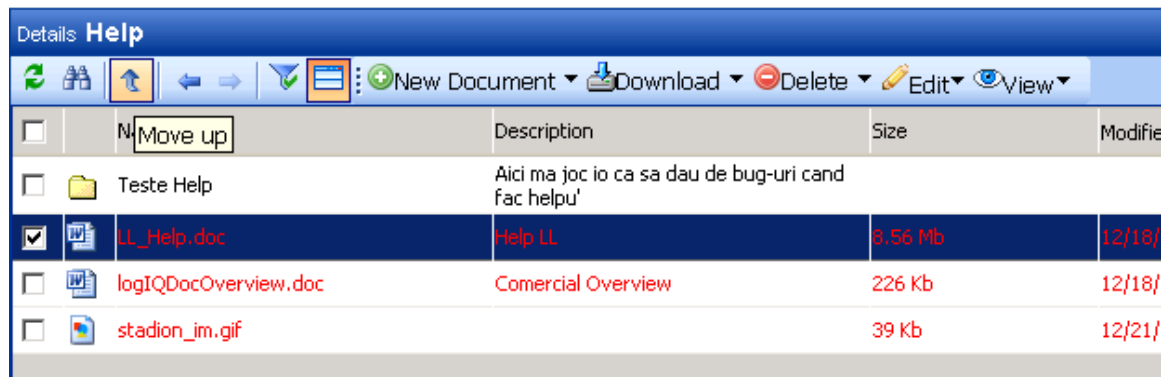
However, logIQDoc groups are much more robust than your garden-variety windows operating system folders. For more information on how powerful logIQDoc groups are, take a glance at the sub-topics under Groups

1. Navigating through Groups

To view the contents of a Group, you can use the Navigation panel by clicking on a node, just like you would do a normal navigation on your filesystem by using Windows Explorer™,

You can also navigate directly from the list by doubleclicking on the group, or by pressing <enter>. logIQDoc will display the group's contents (which may include documents, sub-groups and URLs) on the right-hand side of your screen.

Up, back and forward navigation is also implemented.



	Name	Description	Size	Modified
<input type="checkbox"/>	Move up			
<input type="checkbox"/>	Teste Help	Aici ma joc io ca sa dau de bug-uri cand fac helpu'		
<input checked="" type="checkbox"/>	LL_Help.doc	Help LL	8.56 Mb	12/18/
<input type="checkbox"/>	logIQDocOverview.doc	Comercial Overview	226 Kb	12/18/
<input type="checkbox"/>	stadion_im.gif		39 Kb	12/21/

2. Creating Groups

To create a new group:

- Select a parent Group.
- On the right-hand side of your screen, click on the "New Group" menu item under the "New Document" menu.
- At the "New Group" screen, enter the name for the new group.
- Enter the description for the group (optional but recommended).
- Click "OK" to create the Group and return to the document view.
- Or click on "Next" to specify Group Rules.
- Once you are done with specifying Group Rules, click "Finish" or click on "Next" to set the Group Security

Security Considerations:

In order to be able to create a group, you must have at least "Add" rights assigned at the parent group. An important thing to remember is that a new group will inherit the security permissions from its parent group by default.

If you wish to assign a group its own security (as opposed to allowing it to inherit security settings from the parent group), navigate to the "Details Panel". Click on the "Actions" menu and then on the "Security" button. In the "Group Security" window, click on the "Remove Permission Inheritance" button.

3. Deleting Groups

Users with FULL Control rights at the group level may delete groups. Deleted groups are placed in the recycle bin, and can be recovered by the user who deleted the group or by the System Administrator.

To delete a group, perform the following:

- Navigate to the parent group by clicking on it.
- The group you wish to delete will be displayed on the right-hand side of your screen.
- On the right-hand side of your screen, click on the checkbox to select the group.
- Click on the "Delete" menu item in the "Delete" menu.
- Confirm that you wish to continue with the delete operation.

There are many reasons why you may not be able to delete a group:

- There may be "Checked Out" documents in the group.
- You may not have the required permissions to delete one or more documents in the group.
- Group Rules prevent the group from being deleted.
- One or more documents in the group you are trying to delete, may be under review.
- Any other reasons for which a document contained into the group cannot be deleted

Security considerations:

An "Access Denied" message in logIQDoc does not always mean that you cannot perform that function.

For example, you may have Full Control rights in a group but still not be able to delete the group. The reason may be one or more of the reasons specified above.

As a user with Full Control rights at the group level, you may give yourself the required rights to other documents and groups and try to perform the action again.

4. Group Rules

Group Rules are a set of parameters that extend the functionality of regular groups. You can use "Group Rules" to alter the default behavior of groups. A list of group rules you can set are listed below.

NOTE: group rules override security settings.

To set group rules, please follow these instructions:

- Navigate to the "Details Panel" and click "Group Rules" tab
- Click on the "Edit" button to edit the "Rules".
- Set or un-set the rules by clicking on the appropriate check boxes.

The rules that you can set are:

- **Disallow New Groups**
This rule will disallow the creation of new groups in this group. Use this rule if you wish to preserve the structure of your group tree.
- **Disallow Group Deletes**
This rule will disallow the deletion of groups in this group. You can use this rule to override security settings, so that even if someone has the ability to delete the group, this rule will protect the group. Note: A user with proper rights can change group rules.
- **Disallow Document Checkouts**
This rule will disallow the check out of documents in this group. Use this rule when you wish to prevent users from being able to edit the documents in a group. Note: Documents that were already checked out before this rule is activated are not affected.
- **Disallow Document "Check In"**
This rule will disallow the "Check In" of documents in this group. Use this rule when you wish to prevent the content of the group from being changed. Users who have documents checked out will not be able to check them in until the rule is cleared.
- **Disallow Document Deletes**
This rule will disallow the deletion of documents in this group.

- **Disallow New Documents**
This rule will disallow the creation of new documents in this group.
- **Allow classified Documents**
This rule determines whether documents contained in this group can be marked confidential or classified.
- **File Type Restrictions**
You may set a list of allowed file extensions. This will prevent documents with other file extensions from being created in this group.
- **Default retention period:**
This setting allows you to set default retention period to all documents in this group.
- **Default classification level:**
This setting allows you to set a default classification level to all documents in this group.

Important Inheritance Note:

If Group Rules are defined in a group, subsequently created sub-groups will automatically inherit these rules. However, if you define group rules on a group that contains sub-groups, the rules you set up will not automatically get copied down to sub-groups.

To apply group rules to existing sub-groups, define the group rules on the parent group and check the check box labeled "Include sub-groups" before clicking "Ok" to apply the rules.

5. Group Properties

To view or edit the properties of a group, perform the following:

- Click on the group to display its contents on the right-hand side of your screen.
- Then click on the “General info” tab from the Details panel.
- In the "General Info" tab, there are multiple buttons to help you manage the properties of the group.
- Note that a button is visible only if it applicable to the situation (Ex: if you are the owner of the group, the edit button next to the owner will not be visible – you can not take ownership of your own group)

Here you may change the name or the description of the group. You may also click on the following links to control other properties of the group:

- **Group Security** (In the Details Panel, click on the Actions menu)
Allows you to set Group Level Security
- **Group Rules** (In the Details Panel click on the Group Rules tab)
Allows you to set Group Rules

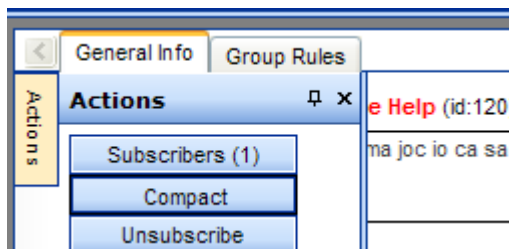
6. Compacting Groups

logIQDoc retains multiple versions of documents. Over time, you may end up with too many versions of documents.

The compact function allows you to get rid of previous versions of documents within a Group or domain.

To Compact your group:

- Select the group you want to compact by clicking on it.
- Click on the "Actions" menu located in the Details Panel.
- Select "Compact".



- The "Compact" window will appear.
- Specify the number of versions you wish to retain. {n}
- Select "Include Subgroups" if you want this operation apply to subgroups as well.
- Click on "OK".

logIQDoc will examine each document in the path and only keep the latest {n} versions and delete the rest.

When the "Compact" operation is complete, each document in the group will have at most {n} number of versions.

Example:

A document has 6 versions. (6,5,4,3,2,1)

You "Compact" the group and specify 2 Versions as the number of versions you wish to

retain.

After the "Compact" operation is complete

The latest 2 versions will be kept and the rest deleted.

Version 6

Version 5

Version 4 (Deleted)

Version 3 (Deleted)

Version 2 (Deleted)

Version 1 (Deleted)

The compact function is permanent and cannot be reversed. You will not be able to restore (through the recycle bin) previous versions removed through compacting.

It is a good idea to compact your group every now and then to reclaim some disk space. Completed projects and submitted proposals are good candidates for the "Compact" feature.

7. Moving Groups

Every now and then, you may need to physically move entire groups to a new location in logIQDoc. When you move a group, the entire contents of the group will be moved including sub-groups and documents

Moving a group will not change any of its settings such as the "Group Rules" or any other data that may have been applied to the groups and documents. However, if the group uses "Security Inheritance", moving the group to a new location may result in a new set of security rules for the group and the documents contained within the group.

To move a group, perform the following:

Use the Move To functionality

Or

Use the Cut-Paste functionality

Moving a group is subject to security rights. You must have "Full Control" rights on the group you are trying to move, because you will be deleting the group from its original position. You must also have at least "Add" rights in the target group, because you will be creating a new group in this group.

Note: Root level groups (Domains) cannot be moved.

8. Group Ownership

Just like documents, groups are also subject to ownership.

The owner of a group is the user who created the group. Anyone with "Full Control" rights, the "System Administrator" and "Domain Administrators" can take ownership of groups.

To take ownership of a group, perform the following:

- Select a group by clicking on it.
- Navigate to the Details Panel.
- Click on the "Edit" button next to the "Owner" section of the General Info tab.
- The "Group Ownership" window will appear.
- Click on the "Select" button next to the "New Owner" section.
- Click on the checkbox labeled "Include subgroups" if you wish to take ownership of subgroups.
- Click on the checkbox labeled "Include documents" if you wish to take ownership of documents within the group and subgroups.
- Click "Take ownership" to become the owner of the group.

7. Searching

All documents added into logIQDoc are automatically indexed for full-text searching. This means that it is easier than ever to locate exactly the information you need.

1. Content Search

You can boost your search content search by using a complex query.

Syntax:

Keyword/symbol	Example	Function
NOT	social NOT security	Finds items containing social , but not security
-	social -security	Finds items containing social , but not security
OR	social OR security	Finds items containing social or security
Quotation marks	"social security"	Finds items containing the exact phrase social security
Parentheses	(social security)	Finds items containing the social and security in any order

Notes:

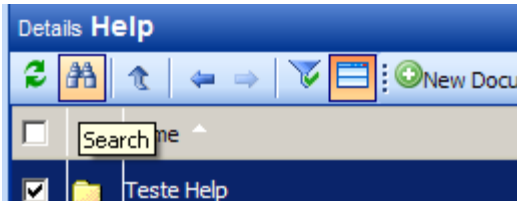
- Boolean operators must be in all uppercase letters.
- You cannot use two keywords (for example, NOT and OR) in the same query.

2. Advanced Search

The "Advanced Search" screen allows users to specify multiple search criteria to find documents stored in logIQDoc.

To perform an "Advanced Search", perform the following:

- Click on the "Search" link in the System Menu.



- The "Advanced Search" window will appear. Here, you may specify one or more search criteria to use when searching for documents.
- Specify your search criteria in the following sections described below.

You than can use the [standard list filtering](#) to further search into the found documents.

Documents containing text:

Does a content search as explained in the previous chapter

Documents and Groups Named:

Text entered here will be used to search against the names of documents and groups. The text of the documents will not be searched; just the names. You may use an asterisk partial document names.

Example:

If you are looking for a document called "Accounting.doc", you may either type in "Accounting.doc" or a partial document name such as:

- Acc
- ing.doc
- .doc

Look In:

By selecting a specific group, you may restrict the search for documents to only those documents contained in the selected group and its subgroup(s), if any.

Document Status:

Use this criteria to search for documents that you know to be "Checked In" or "Checked Out".

Search by User:

- Owned By:

If you know the name of the user who owns the document, you can run a search based on owner by selecting a user from the list.

- Created by:

If you know the name of the user who created the document, you can run a search based on who created the document by selecting a user from the list.

- Checked out by:

If you know the name of the user checked out the document, you can run a search based on who checked out the document by selecting a user from the list.

Size:

Use these fields to limit your search to documents that are at least or at most a set size as measured in Kilobytes.

Importance:

Use this field to limit your search to documents according to their assigned importance levels (Low, Normal, High, Vital)

Classification Level:

Use this field to limit your search to documents according to their assigned classification levels (No Markings, Declassified, Classified, Secret, Top Secret)

Search by Date:

If you would like to search for a document based on a date criteria, you must select one of the options in the "Date Criteria" drop down box.

- Created
- Modified
- Checked out date
- Completed date
- Destroy date

- Retention date

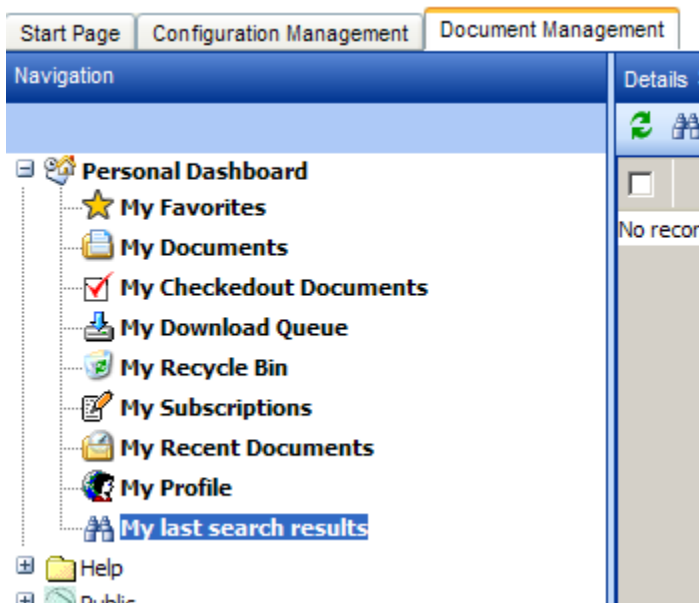
Search in last results:

Select this checkbox if you want to do the search only in the last results.

Ex: If you have found too many documents, you can refine your search by searching with different options in the documents already found.

3. *My last search results*

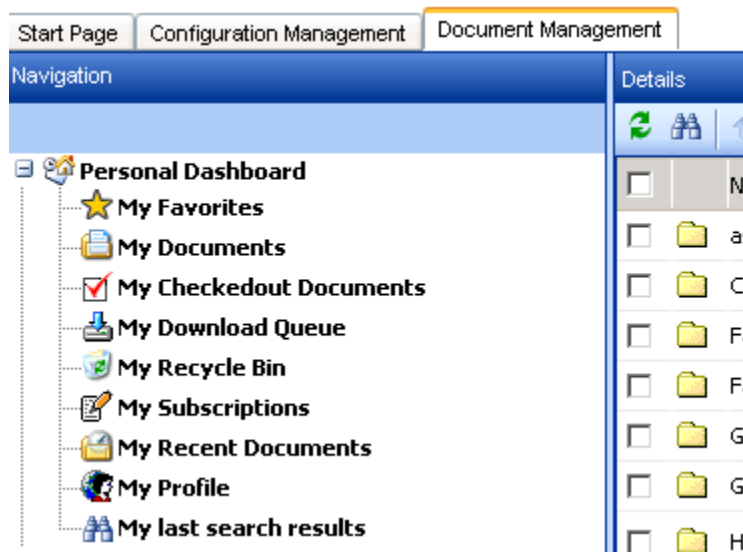
Contains the results of your last search of the current logIQDoc session.



It is useful when you don't want to run again the last search and wait for the new results.

8. Personal Dashboard

The logIQDoc "Personal Dashboard" is a special area that contains user specific information.



These links are shortcuts designed to easy to specific information connected to your activity.

To navigate to your "Personal Dashboard", simply click on the link named "Personal Dashboard" in the Navigation Panel.

For more information on this topic, please review the sub-topics under the Personal Dashboard topic.

1. My Documents

Clicking on the "My Documents" link will display a flat list of your documents (all documents you own), regardless of where they are in the system. Clicking on any document in this list will open the document.

Use this link to quickly find all your documents without having to navigate to all the groups that contain your documents. Use filtering to further query your list.

2. My Subscriptions

logIQDoc allows you to subscribe to documents and groups.

When you subscribe to a document, logIQDoc automatically starts tracking a set of various document events. When the subscribed events occur, logIQDoc alerts you by sending you an email notification.

When you subscribe to a group, logIQDoc automatically starts tracking a set of various events for this group. When new documents are published into this group, and changes to existing documents occur, logIQDoc alerts you by sending you an email notification.

Clicking on this link displays a flat list of such documents and groups regardless of where they are in the system. Use filtering to further query your list.

NOTE: if you subscribe to a group, in your list will appear both the group and the documents contained.

3. My Checked Out Documents

One of the most powerful features of logIQDoc is the ability to retain multiple versions of a document.

logIQDoc does not allow more than one person to edit a document at the same time.

This is accomplished through the "Check In - Check Out" mechanism.

When you check out a document, other users can still view the contents of the document, but they cannot edit it. Other users can also see that this document is checked out to you.

Clicking on the "My Checked Out Documents" link will display all the documents that are currently checked out to you for editing. Use filtering to further query your list.

4. My Favorites

Clicking on this link will display a list of your Favorite documents and groups.

"Favorites" help you navigate to groups and documents that might be buried deep within the group structure.

To add to your "Favorites", navigate to the group or document you wish to bookmark and click on the "Add to My Favorites" link under the "Edit" menu.

5. My Download Queue

The download queue is an area where you can place documents for future downloading.

Although you can download multiple documents directly from a group simply by selecting multiple documents and clicking on the "Download" menu item, the "Download Queue" allows you to navigate to a series of different groups and select documents for downloading.

Once you are ready to download your selections, you can navigate to the "Download Queue" to begin the download transfer.

How to add documents to your download queue:

- Select your documents by clicking on the checkboxes located to the left of your documents.
- Click on the "Add to Queue" menu item under the "Download" menu.

How to begin the download transfer of documents from your download queue:

- Now that you have added your documents to your queue, you can navigate to your download queue to download your documents.
- Navigate to your personal dashboard.
- Click on the "My Download Queue" link located in your dashboard.
- In this screen, you can pick all or a partial list of documents to download.
- Once you make your selection, click on "Download" menu item

Items downloaded from the "Download Queue" are always downloaded in Zip format.

Documents placed in the download queue will remain there until you choose to remove them.

6. My Recycle Bin

Deleted documents are placed in a special location in logIQDoc called the Recycle Bin. Every logIQDoc user has a unique recycle bin that keeps the documents that have been deleted by that user.

logIQDoc users can only see the contents of their own recycle bin however, the system administrator can search through every recycle bin to recover documents.

If one of your documents is deleted by another user, only the user who deleted this document or the System Administrator can recover this document.

If you delete a document and wish to recover it, perform the following:

- Click on the "My Recycle Bin" link located in your personal dashboard tab
- This will launch the "Recycle Bin" window which will display all the documents you have deleted.
- Select the document you wish to recover and click on the "Restore" button.
- You will be prompted for a group to restore the deleted document.
- Select a group and confirm your action.

The document will be restored with all its original information including its versions.

Warning: If you empty your recycle bin, you will lose all recovery information and will not be able to restore your deleted documents without help from the System Administrator.

7. My Profile

The user profile screen contains information about the logged in user. To reach this screen you must first be logged in and not in anonymous mode.

As a user, you can only:

- Change your password;
- Set notification to daily email;
- Modify the email type to text.
- Change your name, email

To change your password, click on the "change password" button. In the change password window type your password, type your new password and then re-type the new password. To Save your new password press the "Change password" button.

Note:

Username cannot be changed by users. Only System Administrators can change usernames. No one, including the System Administrator, can see your password. Pick a password that will be difficult to guess, but easy for you to remember. If you forget your password, click on the "Forgot Password" link or contact your System Administrator for a new password.

8. Recent Documents

Clicking on this link displays a flat list of the last documents you worked on.

9. Domains

Domains are root-level groups that can be created and managed by the System Administrator. The System Administrator can delegate domain management functions to other users by assigning Domain Administrators.

Domains are isolated environments in which a group of users can work, collaborate and produce documents. Only the members of domains can navigate inside domains or even see that they exist. Users are assigned as "Members" to domains by the System Administrator and "Domain Administrators".

The System Administrator and Domain Administrators can also create "Local Users" within domains. Local users are created locally inside individual domains. Local users cannot cross into other domains through domain memberships. They are only visible in the domain in which they were defined. Local users can perform the same functions as regular users but only in their defined domain.

Note: Global Users can be members of multiple domains

There are two types of Domains.

- Common Domains
- Anonymous Domains

Why use Anonymous Domains?

Anonymous Domains are used to publish public documents into a common area where everyone who can navigate to the domain can access documents without having to log on or be defined as a logIQDoc user. Anonymous users will be able to click on and view documents in anonymous domains (subject to security) but only logged in users will be able to edit documents.

Common uses of Domains

- To form a private work group area. For example, the Human Resources department may be set up with a domain that only they can see and access.
- To store sensitive documents or projects in a private area. For example, the Legal department may have contractual requirements to keep documentation separate from general-purpose documentation.

- Allow customers, partners, and vendors access to specific isolated areas (via anonymous domains) without having to give them access to everything else.

1. Creating Domains

Only the System Administrator can create domains.

To create a Domain:

- Click on the "Configuration Management" tab (only the administrators can access that tab)
- Click on the "Domains" link from the Navigation panel.
- Click on the "New Domain" menu option from the System Menu.
- At the "New Domain" screen, perform the following:
 - Enter a Name for the new domain
 - Enter a Description (optional)
 - Select a Domain image (optional) – this picture will be shown next to the domain name.
 - Check the "Is Anonymous" option if you wish to create the domain as an "Anonymous Domain".
- Click next to set group rules. More on this in "[Creating Groups](#)" topic.
- Click Finish to create the new Domain.

2. Deleting Domains

Only the System Administrator can delete a domain.

To delete a domain, perform the following:

- Click on the "Configuration Management" tab (only the administrators can access that tab)
- Click on the "Domains" link from the Navigation panel.
- Select a Domain by clicking on it (you can select multiple domains by checking the checkbox next to the desired domain).
- Click on the "Delete Domain" menu option from the System Menu.
- Click "Yes" to delete the domain(s).

NOTE: by deleting a domain, all the local users will be deleted, including their Personal Dashboard (recycle bin included).

3. Domain Members

Domains can only be accessed by their members (except for Anonymous Domains).

The System Administrator assigns "Users" as "Members" to domains from the "Configuration Management" tab.

Domain Administrators can also create "Local Users" and "Local Roles"

Notes:

Global Users can be members of multiple domains.

Domains are not visible to users who are not members.

When assigning Group and Document Security in a domain, only the domain members appear in the user list.

Security Considerations:

Domains are root-level groups that can be created and managed by the System Administrator. They are subject to security just like a "regular" group.

Any newly created "Local User" will be assigned "Read" permissions on the domain root.

4. Domain Administrators

A Domain Administrator is a user who has been specifically added to the Domain Administrators by the System Administrator. Only the System Administrator or the Domain Administrator can create Domain Administrators.

Note

A domain administrator must first be added as a Member of the domain.

Creating one or more Domain Administrators for each domain is a good strategy. System Administrators can delegate many administrative functions to other users.

What can Domain Administrators do?

- Create Users (Local)
- Create Roles (Local)
- Assign and Manage Security throughout the Domain
- Search through the Domain Recycle Bin

To create a Domain Administrator, perform the following:

- Click on "Navigation Panel" and choose the "Domains" section.
- Select a domain by clicking on the domain name and expand it (click on the "+" sign in front of it).
- Click on the "Domain security" and expand it.
- Click on "Administrators".
- Click the Add User from the system menu.
- Select the user from the user list (note that only Members in the current domain can be added)
- Click "OK".

5. Domain Usage Scenarios

Domains are isolated environments in which a group of users can work, collaborate and produce documents. Only the members of domains can navigate inside domains or even see that they exist. Users are assigned as "Members" to domains by the System Administrator and "Domain Administrators".

Typical Corporate Domain Layout:

A typical corporate environment may have the following departments.

- Accounting
- Sales
- Marketing
- Human Resources
- Information Services
- Customer Service
- Help Desk & Support

All of which are good candidates for Domains.

Why have multiple Domains?

Each department is likely to have their own policies, procedures and security levels defined for their day-to-day operations. Only for this purpose alone, it makes sense to have a separate domain for each functional department or area in your organization. Each domain would have their members who can freely navigate and perform functions dictated by their assigned privileges. Such domains are not visible to non-members.

Common uses of Domains

- To form a private work group area. For example, the Human Resources department may be set up with a domain that only they can see and access.
- To store sensitive documents or projects in a private area. For example, the Legal department may have contractual requirements to keep documentation separate from general-purpose documentation.
- Allow customers, partners, and vendors access to specific isolated areas (via anonymous domains) without having to give them access to everything else.

Why have Anonymous Domains?

Anonymous domains are domains that all logIQDoc users can access.

Once a domain is created as an anonymous domain, the documents in this domain are available for "READ" to all users who navigate to this domain. Users with permissions higher than "READ" will be able to update existing documents, create new documents and new groups just as they would in regular domains.

Common uses for Anonymous Domains

- Public Announcements
- Public Human Resources documents such as Vacation Request Forms
- Public information such as corporate vision, locations, departments etc.

10. Subscriptions

Subscriptions is a mechanism that automatically tracks actions on documents and groups and notifies logIQDoc users. When you subscribe to a document, logIQDoc automatically starts tracking the actions on this document and alerts you by sending an email notification informing you of the actions.

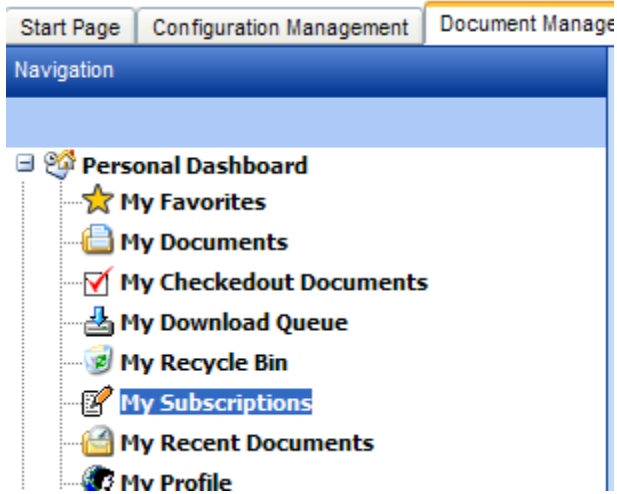
When you subscribe to a group, logIQDoc automatically starts tracking the actions on this group. logIQDoc then alerts you by sending an email notification informing you when new documents are created in this group or when any of the documents within the group are changed.

The events a user can subscribe to are:

- New Documents
- Read
- Change
- Update
- Checkout
- Delete
- Check In

When you subscribe to a group, logIQDoc sends you an e-mail notification whenever a new document is created in that group or a document in that group is edited.

To see a list of all your subscriptions, click on "My Subscriptions" in the personal dashboard tab.



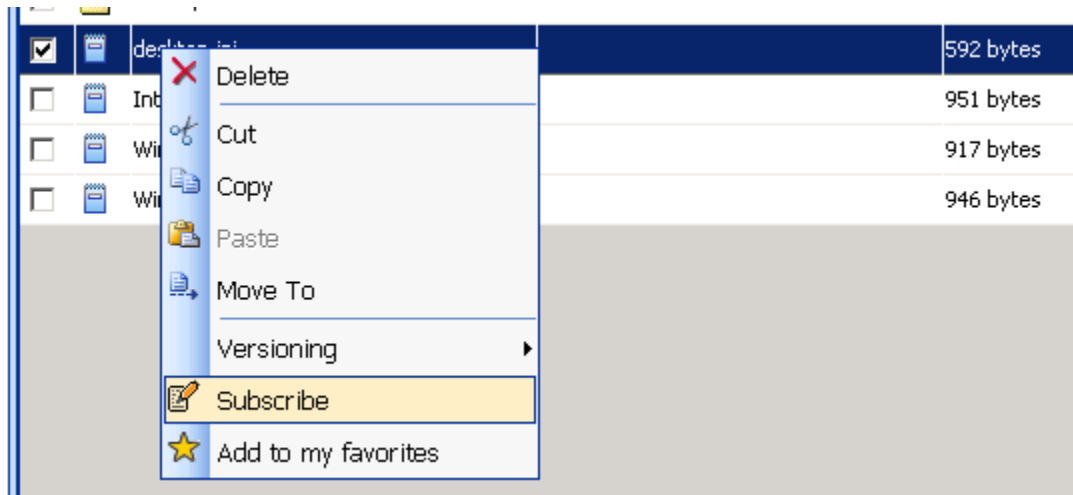
1. **Subscribing**

When documents are revised, it is difficult for interested parties (Managers, Project Managers, Content Managers) to find out about it. If you are one of those interested parties, you can subscribe to documents and groups to be automatically notified of such changes.

It may be very important to know immediately when a critical document such as a contract, proposal document is revised. It may also be very important to know immediately when new documents are created, read, and so on.

To subscribe to documents or groups, perform the following:

- Select the items you wish to subscribe to by clicking on the checkboxes located next to the documents in the document list.
- RightClick the contextual menu and select Subscribe (or use the System Menu→ Edit→Subscribe item).



- The "Subscribe" window will appear.
- Select the events to which you wish to subscribe by clicking on the event checkboxes.
- Click "OK" to subscribe to the chosen events for the selected items

2. Unsubscribing

To cancel your subscriptions (unsubscribe) to documents and groups, perform the following:

Navigate to your personal dashboard.

Click on the "My Subscriptions" link.

Select the documents and groups to which you wish to cancel your subscription by clicking on the checkboxes next to them.

Click on the "Unsubscribe" menu item under the "Edit" menu.

OR

- Select your document or group
- Click on the "Actions" menu in the details panel and select Unsubscribe.

Unsubscribing will result in the canceling of all email notifications you receive from logIQDoc regarding these documents.

NOTE: the user with full-control permissions on a group or document can delete/add subscribers and change the current subscription by using the Subscribers action button.

11. Notifications and Email

logIQDoc supports email notifications. Email notifications are sent to subscribers of documents and groups when changes to documents occur.

This feature has been enhanced to include a subscription preference window that allows users to specify the specific events to which they wish to subscribe.

1. *Send To*

You can send a logIQDoc document to another person by using the "Send To" function. If you wish to send a logIQDoc document as an email attachment, use the "Send To" function.

To do this, perform the following:

- Select the document you wish to send.
- Click on the "Send To" button located in the "Download" menu from the system menu.
- Enter the email address of the intended recipients separated by semicolons, or click on the "... " button to display a list of logIQDoc users.
Note: You may also include email addresses of individuals who are not logIQDoc users.
- You may send the document as a link or as a zip archive simply by checking or unchecking the "Zip attachments" and "Send as link" checkboxes.
- Type in a subject for the email.
- Click on the "Send" button to send the email.

Note: The attachment size is subject to restrictions set by the system administrator. If the attachment is too big, try sending compressed as zip, or try sending as link to the users with proper permissions

2. Subscription Notifications

All subscribers to a document or group will automatically receive an email notification whenever that document is edited. Subscribers to a group will automatically receive an email notification whenever any document in that group is edited or added.

You may select how to receive your notifications in your Profile:

- Instant – if you want to receive a mail instantly;
- Daily – if you want to receive a mail once a day with all the events gathered.

Note: Some email client application or email servers could identify the message as “Phishing”, since the message contains http links to the system. You must mark the messages from logIQDoc as “safe”.

12. Security

logIQDoc provides for a very powerful and flexible security environment. Security can be administered at various levels (Domain, Group, Document). logIQDoc's security is very similar to Microsoft Windows NT/2000/2003 security, with a few exceptions.

Levels of Security:

- **Domain Level Security**
The first level of logIQDoc security is at the domain (root-level group) level. Domains are isolated environments in which a group of users can work, collaborate and produce documents. Only the members of domains can navigate inside domains or even see that they exist.
- **Group Level Security**
The second level of logIQDoc security is at the group level. Access to groups within a domain are subject to Group Security.
- **Document Level Security**
The third level of logIQDoc security is at the document level. Access to documents within groups are subject to Document Security.

1. User Authentication

All users must have a valid account in logIQDoc before they can access its secure resources. logIQDoc user accounts are created by the System Administrator and are stored in logIQDoc's own security database. Your user account is what identifies you both to the system and to other users. It allows you to check documents in and out, and it allows you to be granted permissions within the document and group security framework.

Windows Authentication:

In this mode, users are authenticated directly by Windows NT/2000 or Active Directory. User accounts can be imported into logIQDoc directly from Windows NT/2000 or Active Directory. When a user attempts to log into logIQDoc, their credentials are authenticated directly from Windows and not logIQDoc. Any changes to user passwords do not affect logIQDoc access.

logIQDoc Authentication:

In this mode, users are authenticated directly by logIQDoc (even if they have been imported from Active Directory). This mode is commonly used in environments that support a number of users who are not a part of the domain (e.g. clients, vendors, etc.). In this method, all users are maintained inside of logIQDoc. Changes to user passwords must be performed within logIQDoc.

Mixed Security Authentication:

It is possible to have a set of users who authenticate from Windows and another set of users authenticate from logIQDoc. The "Authentication Type" setting in the "User Properties" window determines whether a user is authenticated from Windows or logIQDoc.

2. Document Security

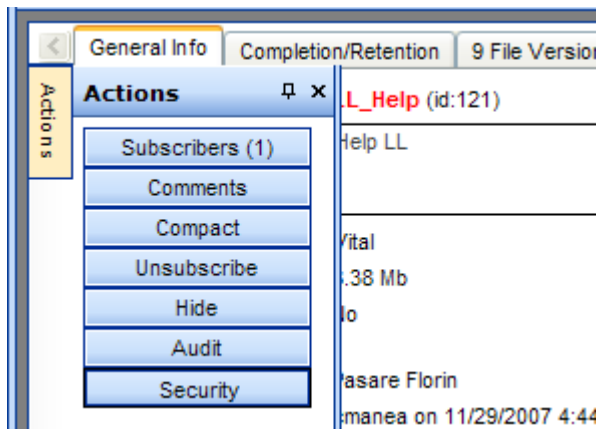
logIQDoc allows the assignment of various levels of permissions to documents. The levels of document permissions available:

- No Access
- Read - the user can see the document properties
- Download – the user can download and see the content of the document
- Change - the user can update properties and content
- Full control – the user can take any action desires

New documents automatically inherit the permissions defined on its group. As the owner of the document, you may alter these default (inherited) permission settings. You may assign permissions to "Users" and "Roles" as you see fit.

To assign permissions to a document, perform the following:

- Select the document you wish to assign permissions to by clicking on the checkbox next to the document.
- Click on the "Security" button from the "Action" side-menu located in the Details Panel to open the "Document Security" window.



- In the "Document Security" window, select Remove Inheritance.
- Select user(s) by checking the checkboxes next to them in the left arm panel.

- Make sure that you also select the appropriate access type from the drop down list box. The default is No Access.
- Click on ">".
- The selected users will be added to the security list with the permission level selected.

Document Permissions Matrix:

Permissions	No Access	Read	Download	Change	Full Control
List Document in UI	x	x	x	x	x
View Document Properties		x	x	x	x
Download Document			x	x	x
Change Document				x	x
Change Properties				x	x
Delete Document					x
Change Permissions					x (+owner)
Take Ownership					x

Notice that the access rights are cumulative. Each access level contains the rights of the one before it, and provides additional rights.

The "No Access" right is the same as not including a user in the access list. It is used in instances where a permission is given to a Role (group of users) and you wish to exclude a member of the group from the assigned security. Learn more about this issue in User Roles.

Note: even if you set No Access, the document will still be listed (if the user has rights to browse the parent group), but the user will not see the details pane. If you want to hide a document you own from all the other users, just set the hidden property. Only you will be able to see that the document exists.

CAUTION: group permissions take precedence over document permissions. However, the precedence is not automatic.

Example:

User A has "Full Control" rights in a group.

User A has been given "No Access" permissions to a document in that group.

When User A attempts to access the document, he/she will get the "Access Denied"

message. However, because User A has "Full Control" rights at the group level, he/she will be able to modify permissions on any document in that group, even take ownership of any document in that group.

3. Group Security

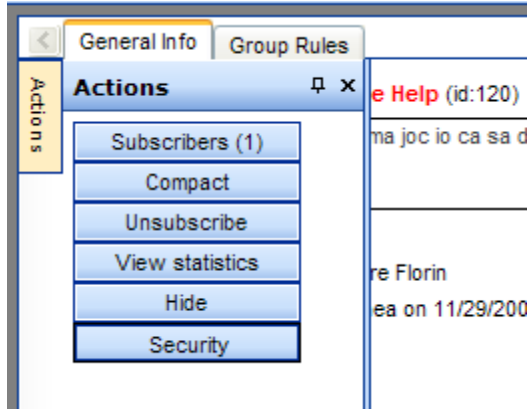
logIQDoc allows you to assign group level permissions. To assign group level permissions, you must have "Full Control" rights to the group. The levels of group permissions available are:

- No Access
- List
- Read
- Download
- Add
- Add and read
- Add and download
- Change
- Full Control

When you assign permissions to a group, those same permissions will be automatically inherited by any documents or group contained in the group if they don't have already a custom set of permissions (no inheritance). You may assign permissions to "Users" and "Roles"

To assign permissions to a group, perform the following:

- Select the group you wish to assign permissions to by clicking on the checkbox next to it.
- Click on the "Security" button from the "Action" side-menu located in the Details Panel to open the "Group Security" window.



- In the "Group Security" window, select Remove Inheritance.
- Select user(s) by checking the checkboxes next to them in the left arm panel.
- Make sure that you also select the appropriate access type from the drop down list box. The default is No Access.
- Click on ">".
- The selected users will be added to the security list with the permission level selected.

Permissions	No Access	List	Read	Dnld	Add	Add& Read	Add& Dnld	Change	Full Ctr.
List		x	x	x	x	x	x	x	x
View doc. properties		x	x	x		x	x	x	x
List folder contents			x	x	x	x	x	x	x
Download Documents				x			x	x	x
Create New Docs Or Gr.					x	x	x	x	x
Change Properties								x	x
Change Permissions									x (+ owner)
Take Ownership									x
Delete Folder									x

The "No Access" right is the same as not including a user in the access list. It is used in instances where a permission is given to a Role (user group) and you wish to exclude a member of the group from the assigned security.

Permissions given to individuals supersede the permissions given to roles (user groups).

Example:

Role A has been given "READ" permissions to a group

USER A is in Role A

User A has been given "Full Control" permissions to the group.

User A will have "Full Control" permissions to the group NOT "READ"

Learn more about this issue in [User Roles](#).

Permission Inheritance:

Setting this option while assigning group permissions allows you to specify that a group should inherit its permission list from its parent group. This is optional, but recommended, because it dramatically reduces the time needed to apply security to child groups. Learn more about this issue in **Inheritance**.

Note:

Groups or users granted "Full Control" at the parent group level can delete or change any sub-groups, regardless of the permissions protecting the group. Any user with "Full Control" rights can set or alter the security at any of the subgroups.

4. Inheritance

This feature allows the setting of security inheritance at the group level. Once a group is set to inherit its security from a parent group, all subsequent sub-groups will automatically inherit their security settings from the parent group.

When a new group or document is created, it automatically inherits its security from the parent group.

When to use Security Inheritance:

Use security inheritance in instances where you plan on giving the same set of users identical rights in most of the sub-groups below. You can always go to any groups that are the exception and adjust their security accordingly. But using inheritance will save you the time of having to apply the same security to multiple places.

When NOT to use Security Inheritance:

If you wish to maintain a different set of rights for different individuals depending on the sub-group, do not use inheritance.

Even if you chose to use inheritance, you may undo this by navigating to the group in which you wish to discontinue inheritance. Display security settings by navigating to the "Security window". In the "Security" window, Click on "Remove Permission Inheritance". This will remove the inherited security setting and allow you to assign a customized set of security that does not depend on the parent group's security settings.

Important Note:

Removing permission inheritance from one group does not affect its sub-groups, because they are still set up to inherit security. The only difference will be that they will inherit their security from their nearest parent group. In this case, the group you just removed inheritance from.

5. Security Scenarios

When you start setting up logIQDoc for the first time or when you create a new domain with a new set of users, follow the path described below for best results.

A Simple Security Implementation:

- Create Users
- Create Global Roles (optional)
- Create Domains
- Create Local Domain Users (optional)
- Create Local Roles (optional)
- Create Groups within Domains
- Make individual users and/or Global Roles, members of Domains
- Give individual users and Local Roles, access to groups.
- Give individual users and Local Roles, access to documents within groups.

13. Administrative Functions

Administrative functions in logIQDoc are primarily performed by the System Administrator.

The system administrator can delegate certain functions to other users by assigning Domain Administrators.

The System Administrator and the Domain Administrator have access to a special area in logIQDoc called the Configuration Management. The Configuration Management contains links to all administrative functions of logIQDoc.

For a list of administrative functions, navigate to the sub-topics located under this topic.

The screenshot displays the logIQDoc Configuration Management interface. At the top, there are three tabs: "Start Page", "Configuration Management" (which is active), and "Document Management". Below the tabs is a "Navigation" pane on the left, listing various administrative functions such as "Application settings", "Languages", "Global security", "Administrators", "Users", "Roles", "Domains" (highlighted), "Recycle bin", "Mime types", "Files extensions", "Custom metadata", "Categories", "Properties", "Resources", "Licensing", "Named users", "Current settings", and "Current usage data". The main content area on the right is titled "Domains" and contains a list of domain folders. Each folder has a checkbox to its left. The "Process Lab" folder is selected, indicated by a checked checkbox and a dark blue background. Other folders listed include "CIV", "Fabio_Domain1", "Fabio_Domain2", "Giamp_Domain1", "Giamp_Domain2", "Help", "MY GROUP", "Public", "Tests Ionut DInu", and "Tests2 Ionut Dinu".

<input type="checkbox"/>	Name
<input type="checkbox"/>	CIV
<input type="checkbox"/>	Fabio_Domain1
<input type="checkbox"/>	Fabio_Domain2
<input type="checkbox"/>	Giamp_Domain1
<input type="checkbox"/>	Giamp_Domain2
<input type="checkbox"/>	Help
<input type="checkbox"/>	MY GROUP
<input checked="" type="checkbox"/>	Process Lab
<input type="checkbox"/>	Public
<input type="checkbox"/>	Tests Ionut DInu
<input type="checkbox"/>	Tests2 Ionut Dinu

1. Managing MIME Types

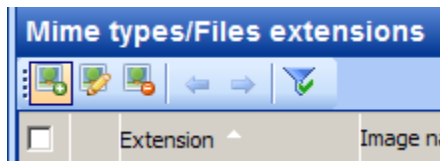
MIME Types allow logIQDoc and your browser to correctly identify the type of document the user is trying to download. With known MIME types, your browser knows to launch the appropriate application when you choose to open the document.

For your convenience, logIQDoc provides a wide variety of commonly used MIME Types. If your organization uses documents or files generated with applications not widely used, the System Administrator may need to identify a new MIME Type.

For example, your company may use a specialized drawing application that generates files with an ".xyz" extension. In this case, the System Administrator would need to identify a new MIME type so that logIQDoc will know which application should be associated with that file extension.

To add a MIME Type, perform the following:

- Click on the "Configuration Management" link.
- Click on the "MIME Types" link in the left side panel
- Click on the "New File Extension" in the system menu.



- In the "File extension" window, enter the following information:
 - Extension: The extension of the file.
 - Description: A brief description of the file type.
 - Icon: The name of the icon file. logIQDoc will display this icon when a document with this type is listed.
- Click "Save".

2. Recycle Bin Management

Deleted documents are placed in a special location in logIQDoc called the Recycle Bin. Every logIQDoc user has a unique recycle bin that keeps the documents that have been deleted by that user. logIQDoc users can only see the contents of their own recycle bin however.

If the user chooses to empty his recycle bin, the documents will be moved further more to the domain recycle bin, accessible only to the System or Domain Administrators, which will be able to further recover your document.

Only after the administrator deletes the documents from the domain recycle bin, it will be physically eliminated from the database. At this point the document is not recoverable from within the system.

The screenshot displays the logIQDoc web interface. At the top, there are tabs for 'Start Page', 'Configuration Management', and 'Document Management'. The left sidebar shows a navigation tree with 'Recycle bin' highlighted. The main content area shows a table of documents in the 'Process Lab/Recyclebin' domain.

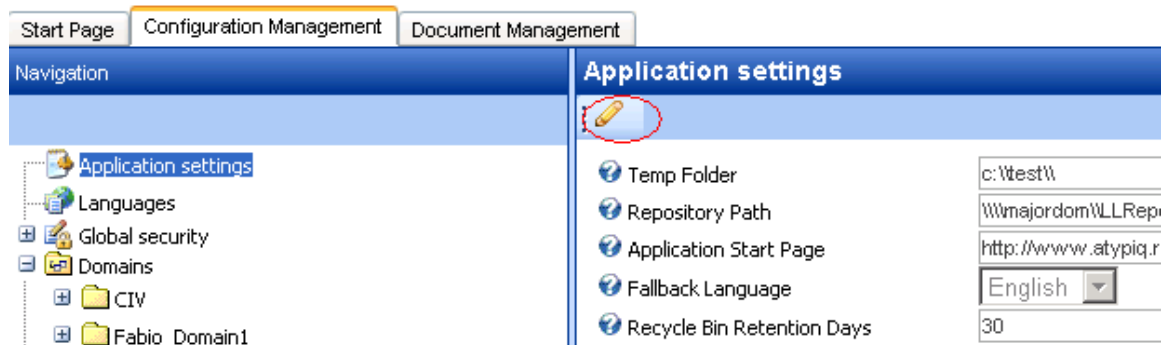
Id	Name
294	Advsearch1.txt
298	Advsearch2.txt
302	Advsearch3.txt
306	Advsearch4.txt
310	ip_koelliker.txt

3. Application Settings

logIQDoc application settings allow System Administrators to alter the behavior of the application.

To view or change the Application Settings, perform the following.

- Navigate to the "Configuration Management" by clicking on the "Configuration Management" tab.
- Click on the "Application Settings" link in the "Configuration Management" window.
- The "Application Settings" window will appear.
- Click on the Edit button in the toolbar to edit your settings



The application setting parameters are as follows:

Temporary Folder:

This setting determines the path logIQDoc will use on a temporary basis during uploads and downloads, and other internal activities.

Make sure that the ASPNET user has "Full Control" file system permissions in this path.

Repository Path:

This setting determines the path to the internal logIQDoc file-system repository database, where all the physical files and document metadata will be stored. It must be set before creating any document into the system.

Make sure that the ASPNET user has "Full Control" file system permissions in this path, and that the indexing service (usually Windows Desktop Search) is indexing that path.

The repository can be stored on another physical machine dedicated to storage, indexing and content search. logIQDoc supports UNC path, it is not needed to map the path to the remote repository.

NOTE: it is a good idea to backup often this repository and at the same moment, the database. This way you will have all information for restoring your system in case of catastrophic hardware failure.

Application Start Page:

Use this setting to set what do you want to see as your start page. It could be your intranet portal, or anything else. You must put the hole address (including http://), exactly as your browser would resolve it if written by hand.

Recycle bin retention days:

The number of days the deleted documents will be left into the recycle-bin. After that number of days, the documents will be automatically eliminated.

This means that if a user deletes a document today, it will be moved to his recycle bin, and if not purged before, it will than be again moved into the domain recycle bin. Once a document is purged and therefore put into the domain recycle bin, it will remain there for the next "Recycle bin retention days", before being eliminated automatically from the system.

Number of days for recent documents:

Sets the number of days to be taken in consideration when creating the list of the documents on which you have taken some action.

List rows:

The number of rows that will be displayed in the grid in one page.

Max Number of Items In a List:

Internal setting used to optimize the paging of the list of documents. If the list must show more than max, it will generate a warning and you will see only the first x elements. If you have huge groups, you should use the search utility to narrow your results and not navigate directly into the group.

Number of Documents From WDS to DB:

Internal setting used to optimize access to the database when intersecting the results of full-text queries.

Do not change if not for a very good reason. If the value is too low than performance may be affected as more hits to the database will be generated. If the value is too high, it could determine timeouts in the response from the database since it would return for every hit a higher number of elements.

Maximum file size:

The maximum file-size that a document can have attached. Setting it to 0 would impose no limit. Any other setting (in bytes) would enforce this limit.

IMPORTANT: This is subject to the limitations on the application configuration in the web.config file.

<httpRuntime> element - maxRequestLength attribute: Indicates the maximum file upload size supported by ASP.NET. This limit can be used to prevent denial of service attacks caused by users posting large files to the server. The size specified is in kilobytes. The default ASP.NET is 4096 KB (4 MB), and the application configuration for logIQDoc overrides this by setting the value to 102400 (100Mb).

Default retention period:

The default retention period for any new domain created into the system. This value can be overridden by the Group Rules settings by the owner of the group.

Download as zip prefix:

It will be used to prefix the zip downloads from the system.

Email Sender Reply-to Address:.

This setting is used when emails are sent out from the system. This value appears in the "From" portion of the outgoing notification emails. If you do not specify this setting, your SMTP Server will most likely move logIQDoc notification emails to the BAD MAIL folder.

SMTP Server Name:

This setting determines the SMTP Server Name that logIQDoc is going to use when sending out email notifications. This is "localhost" by default but you can specify a remote SMTP Server Name if you wish.

SMTP Server Port:

This setting is the SMTP Port number to be used in the SMTP Server specified above. It is Port 25 by default.

SMTP User Name:

This setting is the User name to be used when establishing a connection to the SMTP Server for SMTP Servers that require authentication.

SMTP Password:

This setting is the Password to be used when establishing a connection to the SMTP Server for SMTP Servers that require authentication.

Restrict sending documents only as links:

The administrator can restrict to sending email ONLY as links (this way no important confidential documents will be stored on some email-server that you don't have control on). No attachments will be allowed in the Send To Utility.

Maximum Attachment Size:

Setting to determine the size of the attachment. If set to 0, no limit is imposed, otherwise the specified number (in megabytes) is imposed.

Important Note:

Please check your SMTP Server Configuration parameters to make sure that the limit you set here matches the limit set there.

14. Users and User Management

All users must have a valid account in logIQDoc before they can use it (except Anonymous users). logIQDoc user accounts are created by the System Administrator and Domain Administrators and are stored in logIQDoc's own security database.

Your user account is what identifies you to both the system and to other users. Only users with valid logIQDoc accounts can be granted permissions within the document and group security framework.

Users with valid accounts (also called authenticated users) can perform tasks such as creating documents, editing existing documents and creating groups as defined by their security profiles.

There are three types of Users:

- Global Users
- Local Users
- Anonymous Users

Global Users:

Regular users are created by the System Administrator and given a username and password. They must be specifically granted access to groups and documents before they can view or edit documents.

Local Users:

Local users can be created by the System Administrator or Domain Administrators. These users are created locally inside individual domains. Local users cannot cross into other domains through domain memberships. They are only visible in the domain in which they were defined. Their actions appear in the audit logs because they can be identified individually. Local users can perform the same functions as regular users but only in their defined domain.

Anonymous Users:

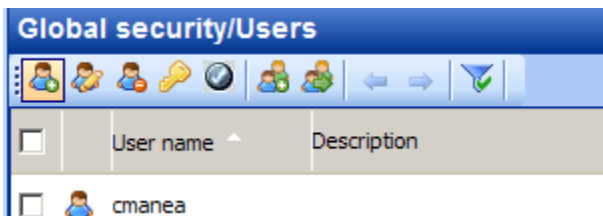
Anonymous Users are NOT created. They exist inherently whenever Anonymous Domains are created by the System Administrator. These users cannot be tracked or

audited. They cannot be given any specific permission. They can only view documents in domeins that allow anonymous access.

1. Adding Users

To add an user:

- Click on the "Configuration Management" link.
- Click on the "Global Security" link on the left-hand side.
- Click on "Users".
- The right-hand panel will display a list of existing users.
- Click on the "New User" link in the System menu.



- The "New User" pop-up will display.
- Enter the following information:
 - User Name
 - First name
 - Last name
 - Password
 - Confirm Password
 - E-mail Address (logIQDoc uses this to send change notifications)
 - Language
 - Comment (optional)
- Click "Ok".

2. Importing Users

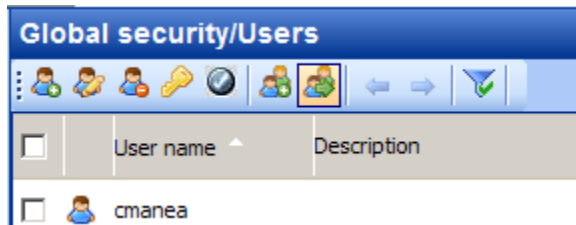
All users must have a valid account in logIQDoc before they can use it. logIQDoc user accounts are created by the System Administrator and are stored in logIQDoc's own security database.

Your user account is what identifies you both to the system and to other users. It allows you to check documents in and out, and it allows you to be granted permissions within the document and group security framework.

The System Administrator can reduce the time it takes to add logIQDoc user accounts by importing users directly from your existing Windows Active Directory user database.

To import Active Directory Users, perform the following:

- Click on the "Configuration Management" link.
- Click on the "Global Security" link on the left-hand side.
- Click on "Users".
- Click on the "Import Users from Active Directory" button from the system menu.



- The " Import Users from Active Directory " window will appear.
- Select the appropriate NT User Group from the drop down list. (Example: Domain Users) This may take a few seconds. Wait until the user list is refreshed.
- If you have an email account naming convention where your Windows 2000/NT login usernames are also a user's email address, you may enter your company email URL to automatically create the email address information for the imported users in logIQDoc.
- Finally, select your method to create passwords. If you choose to assign them randomly, logIQDoc will display a list of imported users along with their assigned passwords. Otherwise, you can assign everyone the same password. If you select this, users will be prompted to change their passwords at the time of their first login.

Note:

For users authenticated by Windows Active Directory, the import result will not display passwords. This is because logIQDoc will not rely on generated passwords, but will rather rely on Windows Active Directory to verify the ID and Passwords of the incoming users.

If these users choose to be authenticated from logIQDoc, they can create a password in logIQDoc and choose "logIQDoc" as their Authentication Authority at login.

Make sure to read the authentication section for important setup information for Windows Authentication to function properly.

3. *Deleting Users*

From time to time, the System Administrator may have to delete a logIQDoc user.

To delete a user:

- Click on the "Configuration Management" link.
- Click on the "Global Security" link on the left-hand side.
- Click on "Users".
- In the list that appears, select the user you wish to delete.
- Click "Delete User".

Note:

The Personal Dashboard and all the subscriptions will also be deleted.

4. User Roles

A Role is a logical grouping of users within a Domain. Roles make the distribution of documents and assignment of security easier. Only the System Administrator and users with "Full Control" rights at the Domain group level can create roles.

Roles can exist at two levels: "Global Roles" are available from all domains. "Local Roles" are available only within the domain they were created in.

Creating and adding users to a Global Role:

- Click on the "Configuration Management" link.
- Click on the "Global Security" link on the left-hand side.
- Click on "Roles".
- Click on "New Role".
- Enter a description (optional)
- Enter a name for the role, then click "OK".
- To add users to the new role, select the role name from the list.
- Click on the "Maintain Users" button.
- Select the users from the left side panel and click on the ">" to attach the users to the role.

Creating and adding users to a Local Role:

- Click on the "Configuration Management" link.
- Click on "Domains" and explode it.
- Select a domain and explode it.
- Click on "Domain Security" and select "Local Roles".
- Click "New role" from the System menu.
- Enter a name for the user role, then click "OK".
- To add users to the new role, select the role name from the list.
- Click on the "Maintain Users" button from the system menu.
- Select the users from the left side panel and click on the ">" to attach the users to the role.

Deleting a Role:

- Navigate to the "Roles" list (either in the "Global Roles" area, or in the "Local Roles" area for the domain in question).

- Select the Role you wish to delete from the "Roles" list.
- Click on the "Delete Role" button.
- Click "Yes".

15. Fortress

To assure that every one of your documents are safe and secure, logIQDoc comes with an innovating feature. You can encrypt your documents using a different password everytime (or use the same one) and nobody can access them without the associated password.

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