

# Simple Document Management Software Solution

## Tutorial



<http://www.database-apps.ro/simple-document-management-solution/>

## Plan you implementation!

You can start using KeyDoc right away but the recommended way is to plan your implementation.

There are a few steps that you should follow:

1. Backup your empty database;
2. Define Users;
3. Define User Groups;
4. Define Menu Level Access Rights;
5. Define Default Access Rights;
6. Define Folder Structure;
7. Define Access Rights per folder;
8. Define Document Types(optional but recommended - used in search);
9. Start populating your software with documents: into folders, and (optional) add attributes like document type, keywords, description.

## Backup your empty database

You should start by making a backup for the empty database just to be sure that, if everything goes wrong, you can start all over again.

During the implementation process it is recommended to make backups each time you feel confident that you successfully finalized a step.

See software Help for details on backup and restore.

## Define Users

You must know who will use the software. So make a user list.

You'll need:

- Username (**unique!**);
- User first name;
- User last name;
- User password: the password should be the same as the username because each user has the option to change the password after first login;

- Email address: optional – in fact, at least for the version 1.0.0 you don't need this because there are no notifications;

EXAMPLE (I use generic usernames, easy to work with on demo):

- admin - Application Administrator (already exists)
- gm = General Manager
- financial1 = Financial1 John
- financial2 = Financial2 Mary
- financial3 = Financial3 Bobby
- it1 = IT1 Stefan
- purchase1 = Purchase1 Emma
- sales1 = Sales 1 Ivan
- sales2 = Sales2 Alex
- secretary1 = Secretary1 Helen

## Define User Groups

Note that the software term for Groups is Roles.

This is not mandatory but it's highly recommended.

You can use the user group to define the folder/ subfolder access rights and menu level access rights. It is recommended to keep the access rights definition at group level because it is easier to maintain. Imagine that one of your coworkers decides to leave and somebody else takes his/ hers place. If your access rights are defined per user, you must change/ define new access rights. If you have the access rights defined per group, all you have to do is to insert the new colleague in the right groups.

You should define an Admin group for managing the administrative and configuration menu level access rights. You'll probably have one or two users in this group, one of them being "admin".

EXAMPLE: Probably one group per department: Financial, IT, Purchasing, Sales, Secretarial + ADMIN

Group ALL already exists. Each time a user is created it is automatically added to this group. You should not modify this group. By default, group ALL has all access rights. You can change the Default access rights according to your preferences. See next chapters.

## Define Menu Level Access Rights

You can, and you should, set access right for each menu entry. By default, group ALL (that means everybody) has full access. You should restrict the access at least for the administrative and configuration menus. It's up to you but if everybody configures the software according to their preferences you'll end up cleaning the mess.

## Define Default Access Rights

Each time a folder is created by any user, a set of default access rights is implemented.

You have several options here. You can add groups and/ or users, you can define relative access rights (as specified in example below) or you can go deep and write a SQL condition that applies to groups or users.

The last option is complicated and requires good knowledge of SQL. Maybe I'll prepare another tutorial specifically for this feature. For now, don't go there!

Example:

- [Record Creator's Groups] = View, Modify, Delete, Rights
- user General Manager = View, Modify

This means that each time a folder is created, the access rights to that folder will contain a list containing all the groups that the folder creator belong to, plus user "General Manager" having only View and Modify rights (he/ she cannot delete documents or folders and cannot change the access rights).

## Define Folder Structure

EXAMPLE:

- Departments
  - o Financial
  - o IT
  - o Purchasing
  - o Sales
  - o Secretarial

- Customer
  - o Contract
  - o Offer
  - o SO
- Supplier
  - o Contract
  - o RFP
  - o PO
- Public

## Define Access Rights per folder

Now you have the folder structure and each folder has the access rights set according to your template definition. If you used my example, each folder can be accessed by your groups (admin) and the gm (General Manager). Change them as needed. Remove your groups and add the appropriate ones. I assume that the gm rights should be kept as defined in the template. Again, it's up to you.

### EXAMPLE:

- Departments (group ALL)
  - o Financial (group Financial)
  - o IT (group IT)
  - o Purchasing (group Purchasing)
  - o Sales (group Sales)
  - o Secretarial (group Secretarial)
- Customer (group Sales + group Financial)
  - o Contract (group Sales + group Financial)
  - o Offer (group Sales)
  - o SO (group Sales)
- Supplier
  - o Contract (group Purchasing + group Financial)
  - o RFP (group Purchasing)
  - o PO (group Purchasing)
- Public (group ALL)

## Define Document Types

You have the option to add “document type” as a document attribute. Document Type can be used to filter the search results. We recommend you to use this feature.

Document Type is a mandatory field but, if you don't want to use it, all you have to do is set a default value. This way, all documents will have the same “type” (automatically added by software).

You can hide the corresponding column from the document list. Right click on table header.