Administrator Manual

The manual covers the topics that a person holding administrator rights comes across.

Administrator levels

There are five administrator levels and every following level has more rights compared to the preceding level.

Unit administrator

The unit administrator (i.e. unit admin) can manager users, grant access rights and perform simpler administrative actions within the limits of their unit. The unit administrator is preferably a clerk (not an IT specialist). In the case of using units, the unit administrator is a subunit's first point of contact whom users contact in the case of problems. A unit administrator can be appointed by the desktop administrator. To appoint a unit administrator, the "Is unit admin" field must be activated in the user information of the user.

Access rights	
Is desktop admin:	Yes
Is admin:	No
Is unit admin:	No
Is unit news admin:	No

Actions of the unit administrator:

- adding unit users, changing data and passwords, closing user accounts upon job departure;
- insertion and management of the list of documents;
- binding data types to the list of documents;
- creation and changing of counters and binding them to data types;
- creation and management of groups;
- granting access rights.

Standard administrator

The standard administrator (i.e. admin) has the same rights as a unit administrator, but can perform administration actions across the entire system, i.e. across units. The standard administrator can be appointed by the desktop administrator. To appoint a unit administrator, the "Is admin" field must be activated in the user information profile of the user.

Standard administrator's actions

The same as those of a unit administrator.

Desktop administrator

The desktop administrator (i.e. desktop admin) can take all administrative steps throughout the system. As a rule, a clerk or one of the staff that runs errands is the desktop administrator. The desktop administrator has all the rights of the lower-level administrators plus the permitted actions of the user that holds the desktop administrator rights.

Actions of the desktop administrator:

- management of user accounts, incl. appointing users as standard and unit administrators;
- creation and administration of data types (i.e. screen forms);
- adding data fields to screen forms;
- restoration of deleted objects;
- adjustment of classifier settings;
- adjustment of the settings of various options;
- creation of connections between data types;
- using the archiving and destruction module;
- administration of the document exchange centre DVK;
- adjustment of desktop settings;
- administration of the LDAP interface;
- adjustment of menu settings;
- viewing of login history;
- adjustment of firewall settings;

- creation of entries applicable across the desktop (in favourites, saved searches), which are available to all users of the desktop.

Super administrator

The super administrator (i.e. super admin) can observe the server statuses (processes, hard disk volumes, etc.), add new desktops and the first user, appoint users as desktop administrators and set volume limits to desktops. No day-to-day work can be performed as the super administrator.

IT administrator

The IT administrator is an IT specialist who is responsible for the functioning of a server and for making backup copies. As a rule, the IT administrator does not have special rights in WD, but holds the rights of an ordinary user.

Setup of the login window

The settings of the login window concerning all users of the system are adjusted in the configuration file. As the administrator, you can determine on the user map whether and with the help of which identification tool (username, ID card, Mobile ID) the user can enter the system.

Login with an ID card

In order to enter the system using an ID card, the personal identification code field of the user map of the user must be filled in.

Login using Mobile ID

To create the Mobile ID login option, the name of the service agreed with Sertifitseerimiskeskus, which is specified in a respective contract, must be inserted in the WebDesktop configuration file. In the hosting solution make certain that OSCP queries are permitted from the firewall.

The creation of the Mobile ID login option also gives the chance to use server-based signature, because the service used is the same (OSCP queries).

The person who wishes to enter the system using Mobile ID must fill in the personal identification code and GSM fields in their user account map.

Adjustment of the settings of the opening page of the desktop

You will find the general introduction of the opening page of the desktop in the ordinary user manual. Next, we will give an overview of the possible administrative actions for the opening page of the desktop.

Top bar

The desktop administrator can adjust the following settings with regard to the top bars of all users:

- add favourites to the top bar (see 'Adjustment of the settings of add-on modules');
- adjust the effectiveness of the search window or global search (see 'Search system').

Opening page of desktop

The location of the blocks of the opening page of the desktop has default settings and these can be changed by the IT administrator.

Most of the information important to the user is located on the desktop. Data of different types are divided into respective blocks and these may be different for different users, depending on the roles/rights attributed to them or the setup of the system of the entire institution. The currently active location in the tree can be seen at the upper left-hand edge of the desktop (i.e. which tree directory is currently active), while system menus are located at the right-hand edge (Search, Add new, Manage).

Possible blocks of the opening page of the desktop

Document exchange centre

The list of documents received via the DVK (document exchange centre) and of unregistered documents. Displayed only to the users having the respective right (to users located in the DVK registration group).

Tasks

One-off work tasks given to the user, which are not related to processing documents. For instance, “adding paper to the printer”. Added from the menu “Add new” → “Task”.

Overdue tasks

The same as in the previous section, but overdue tasks (turns red).

Birthdays

Birthday-type events added to the calendar, which are displayed three days before the birthday.

Calendar events

All calendar events related to your user. Displayed one week before the occurrence.

Favourites

Links to frequently used websites. Can be intra-WD (e.g. saved searches) or external websites.

Recently added

The last 10 documents or objects added.

To me

Documents addressed to the user for processing.

Other routings

This block covers proceedings added by the user or which the user wishes to follow, e.g. monitoring work tasks given to one's subordinates. These routings can be removed from the opening page using a respective button (“Remove selected from opening page”).

Overdue documents

Documents with an execution date, which have not been replied to by the prescribed date.

News – Internal

Intra-institutional news.

News – Postimees

News from the *Postimees* daily newspaper.

Tree

Since the tree is not meant for daily use, but it rather constitutes a system administration tool, it may be necessary to close the tree for ordinary users.

- Choose “Management” → “Desktop admin” → “Desktop” in the top menu.
- Click on the “Change” button.
- In the “Minimise tree” row, make the respective choice.
- Always minimised – the tree is always closed for the ordinary user and they do not see the choice “Minimise tree upon booting” under the settings opened in the management menu.
- Always open – the tree is always open for the ordinary user and they do not have the choice

“Minimise tree upon booting”.

- Determined by user settings – the ordinary user can decide whether they wish to have the tree collapsed or not upon login (there is a choice “Minimise tree upon booting” in the settings).

Menus

The menus are gathered into the upper right-hand part of the desktop. Depending on the module used, the composition of the menus may vary, but usually three main activity menus are displayed:

- Search – for data search;
- Add new – for adding data;
- Management – for management of data contained in the system.

For further information on the structure and adjustment of the menus see the chapter “Menus”.

List view (opens from the search and management menus)

If you have filtered out the search results using the menu or opened a document register via the management menu, the view is called the list view that can be opened from the menu. Compare also with the List View (that can be opened from the structure tree).

Displaying objects/documents on the desktop (icon or list view)

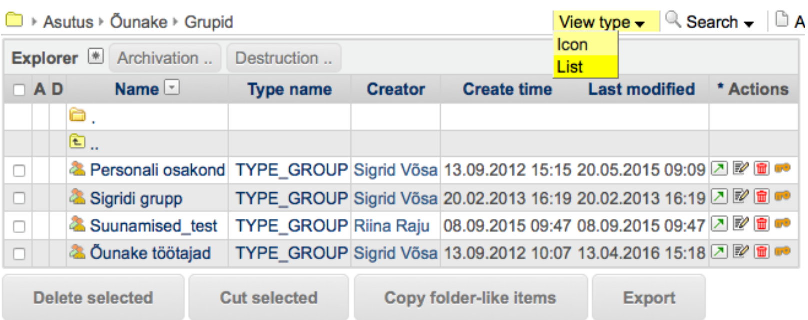
Icon view

- To go to the icon view, click on any directory in the tree.
- The desktop browsing view will be opened. Choose “View” → “Icon” from the top menu.

By default, objects are displayed as icons where the menu is opened upon a right-click of the mouse.

List view (that can be opened from the structure

The list view is the most used. To go to the list view, choose “View” → “List” from the top menu and WebDesktop will be switched to the list view.



Structure tree

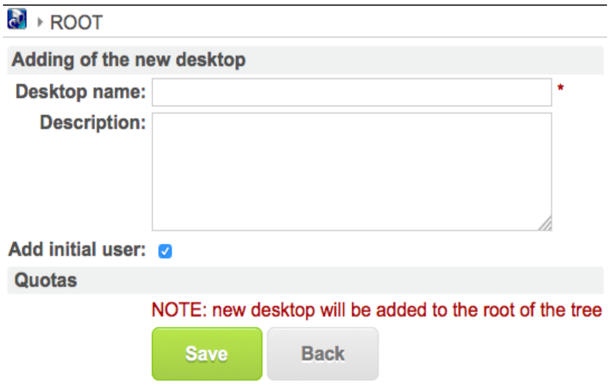
The purpose of creating the structure tree (hereinafter the tree) is the structuring of data inserted in the system. The tree consists of directories and of directories of a special type (units, functions, subfunctions, series and subseries) that all assist in data structuring. Access to directories is also restricted in the tree. Upon creating the structure tree, objects are inserted in the following order:

- desktop;
- units;
- directories, incl. the list of documents.

Desktop

Creating the desktop

The desktop is the first level in the tree, which is inserted upon putting the system into use. Only the super administrator has the right to insert the desktop. Units and directories are inserted under the desktop (users, counters, the list of documents, etc.). There can be multiple desktops in the system (if the same system is used by, for instance, a subagency whose register cards are completely different from those of the main institution). If the institution has multiple subagencies, it needs to be decided whether to insert the subagencies under the same desktop as units or insert each subagency as a new desktop.



To insert a desktop, choose the menu “Add new” → “Desktop”.

- Desktop name – the name of the desktop (usually, the name of the institution itself or its abbreviation).
- Description – additional information on the desktop.
- Add original user – after saving, the super administrator is taken to the user insertion map so that the super administrator could insert the desktop administrator. Save the changes.

> Please note: After the insertion of the desktop administrator, the desktop administrator will continue inserting units, directories, users, etc.

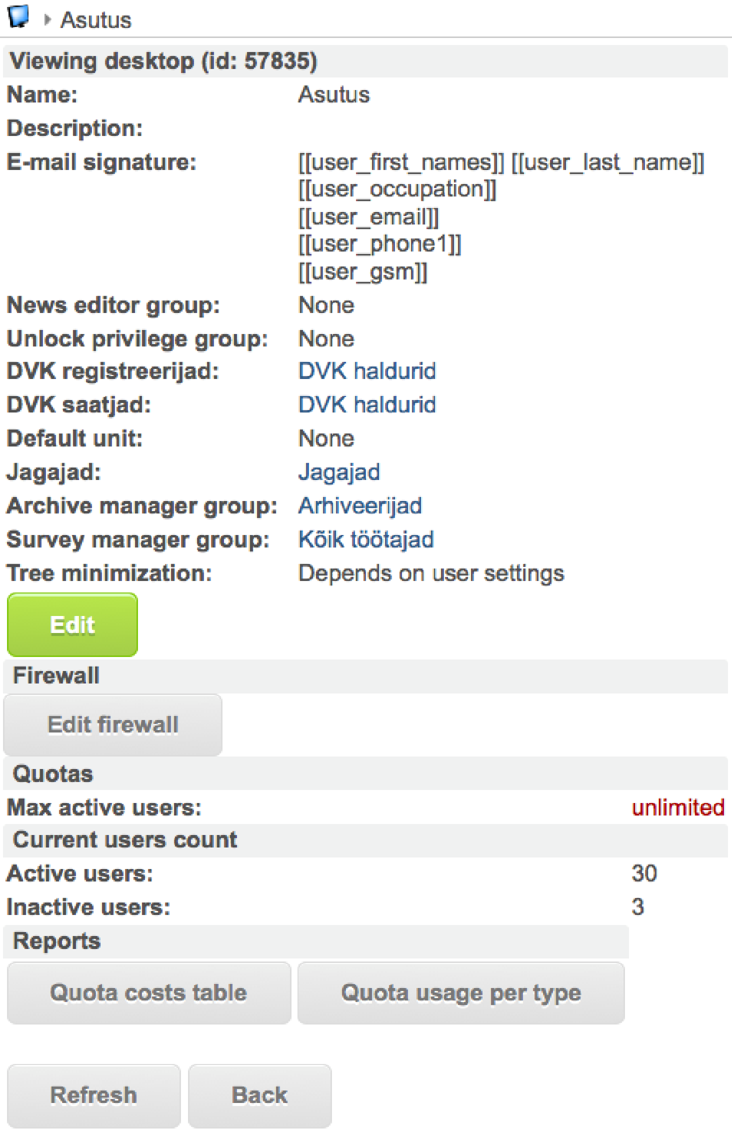
Adjustment of desktop settings

- Choose “Management” → “Desktop admin” → “Desktop”.
- Click on the green “Change” button.

View the desktop

- **Name** – the name of the desktop (usually, the name of the institution itself or its abbreviation).
- **Description** – additional information on the desktop.
- **News editor group** – a group whose members have the right to add and manage the news.
- **Unlocking group** – a group whose members have the right to unlock documents.
- **DVK registrars** – a group whose members have the right to register documents received via DVK.
- **DVK recipients** – a group whose members have the right to send documents via DVK.
- **Default unit** – used by default for the establisher of a restriction, the institution acting as a sender in DVK, etc.
- **Archiving managers group** – a group entitled to use the archiving module.
- **Survey editor group** – a group entitled to manage the survey module.

- **Tree minimisation** – the pre-setting of the tree for the ordinary user:
    - **Always minimised** – the tree is always closed for the ordinary user and they do not see the choice “Minimise tree upon booting” under the settings opened in the management menu.
    - **Always open** – the tree is always open for the ordinary user and they do not have the choice “Minimise tree upon booting”.
    - **Determined by user settings** – the ordinary user can decide whether they wish to have the tree collapsed or not upon login (there is a choice “Minimise tree upon booting” in the settings).



Firewall – the settings of the firewall functionality allow for restricting the login of users from different computer networks based on the pattern of the IP address (e.g. users can log in only from the computer network of their institution).

- **Activated** – the firewall is checked upon the login of each user.
- **Default policy**
    - **Permit** – the user is permitted to log in if the rules of exceptions (see the next settings) do not preclude it.
    - **Prohibit** – the user is not allowed to log in.
- **Rules of exceptions** – IP address patterns (rules of exceptions divided by the change of the row, which override the default policy (see the previous row)). Example: 192.68.1*

Restrictions

- **Max. no. of active users** – the number of purchased licenses.

Number of users at the moment

- **Active users** – the number of logged-in users.
- **Inactive users** – the number of users whose status is ‘passive’.

Volume restrictions

- **Restriction** – a system cost factor (an additional opportunity for establishing restrictions in order to limit the size of inserted objects and documents (0=unlimited)). Before the insertion of a restriction, please consult Webware OÜ.
- **Default user restriction** – volume of objects and documents to be inserted per user. Before the insertion of a restriction, please consult Webware OÜ.
- **‘Show user restrictions’ button** – the table of restrictions that displays the restriction volume and the amount (%) of used and unused volume per user.

Reports

- **General table of restriction costs** – prescribed volumes for types and cost amounts.
- **Restrictions per type** – the actual volumes of types and costs.

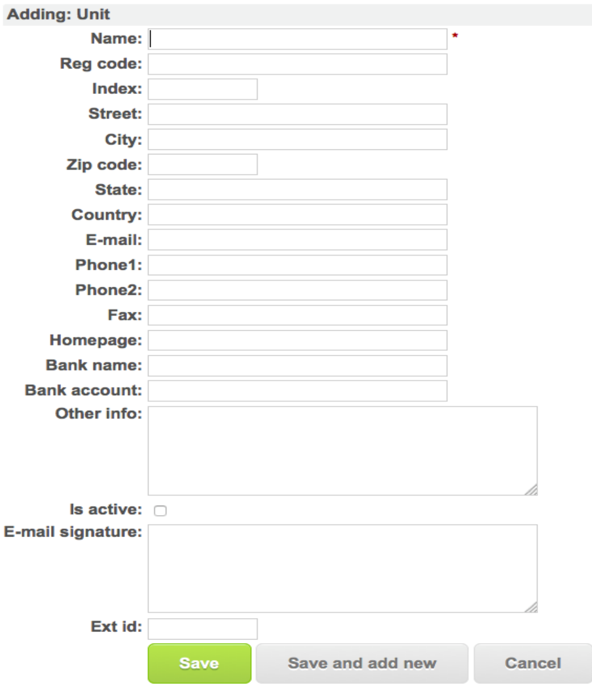
Units

In WebDesktop, a unit means a business belonging to a company or an agency governed by a ministry, not the department of a company, even though the latter solution can be used, too. Rather, we assume that a unit is a separate (sub)agency that has established its own list of documents.

Agencies (units) form a hierarchical tree in WebDesktop. The specific registers and data of the agency are located in the tree under the respective agency.

Adding a new unit

To add a new agency or unit, open the desired level in the tree.
Choose “Add new” → “Admin” → “Unit” in the menu.
The unit addition map along with details describing the unit (agency/subagency) will be displayed:



- Name – the name is mandatory;
- Registry code - the registry code of the unit;
- Index – the index of the unit. The index is displayed in the tree in front of the unit name. Used if the agency indexes units (not mandatory);
- Street – the name of the street;
- City – the name of the city;
- Postal code
- County;
- Country;
- E-mail – the e-mail address of the unit;
- Phone 1 – telephone 1 of the unit;
- Phone 2 – telephone 2 of the unit;
- Fax – fax number;
- Website – the address of the homepage;
- Bank – the name of the bank used by the unit;
- Current account – the current account number of the bank used in the unit;
- Other information – additional information on the unit.

Please note: After adding a unit, make certain that you have created it at the right level in the tree.

Changing unit data

To change the data of a unit, click on a level higher than the desired unit in the tree (e.g. the desktop icon).
Depending on whether you have set the tree to the icon or list view, choose the following:

- in the icon view, make a right-click with the mouse and choose "Change";
- in the list view, click the “Change” button in the list of actions in the desired unit row.

Make a right-click with the mouse and choose “Change” from the menu on the unit icon (in the icon view).
Save the changes.

Management of directories

The standard administrator and, within the unit, the unit administrator have the right to manage directories.

Usually, the following directories are created under each desktop:

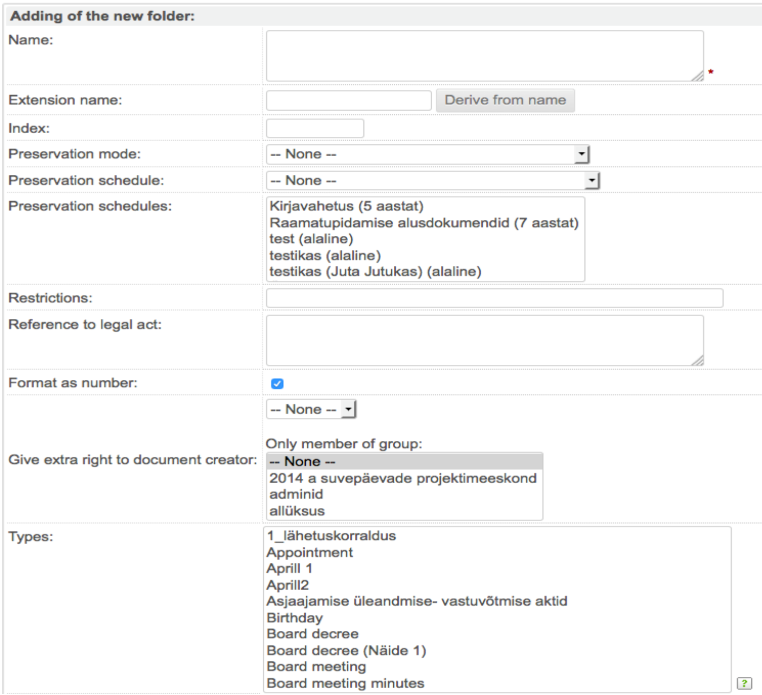
- Discussions;
- Groups;
- Users;
- Print templates / Document templates;
- Register/list of documents;
- Users’ calendars;
- Counters;
- Tasks

Insertion of directories

Move to the desired level in the tree.

Choose “Add new” → “Directory” in the menu.

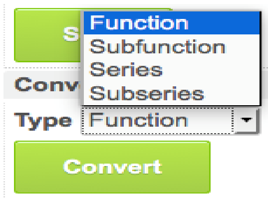
The data map with the following blocks and fields will be opened for the addition of a new directory:



- **Name** – name of the directory;
- **Index** – a directory index that is used for indexing a document inserted into the directory.
- **Preservation term** – an informative field on the preservation term of documents inserted into the directory;
- **Restrictions** – an informative field on (access) restrictions established on documents;
- **Reference to legislation** – an informative field on the legal basis for the established access restrictions;
- **Format as a number** – if you have ticked the box, the directory index (see above) must contain numbers. If you untick the box, the index may also contain letters;
- **Has archiving value** – an informative field;
- **Give special right to document adder** – on the functionality of the special right see the access rights topic for further information;
- **Types** – data types based on which documents will be registered in the directory, i.e. the connection between the directory and data type will be made here;

On how to set up the remaining blocks, see the sections on functions and addition of series.

Convert of directories



To change a directory, click on a level higher than the desired directory:

- in the icon view, right click on the respective directory and choose "Convert" from the menu;
- in the list view, click on the change icon (located in the “Actions” column).

Make the changes and save.

On the directory change form you can change the name of the directory, the connection to data types and convert the directory into a function, subfunction, series or subseries.

Deletion of directories

Upon deletion of a directory, all the documents/objects under it are deleted as well. Thus, before deleting a directory, check if anything has been registered under it and, if necessary, place them (using the Copy-Paste function) in another directory.

To delete, click on a level above the desired directory:
- in the icon view, right click on the respective directory and choose "Delete" from the menu;
- in the list view, click on the delete icon (located in the “Actions” column).

Creation of a hierarchical movement scheme

The work of an agency is closely related to various documents. Before putting WebDesktop into use, it is advisable to establish a scheme for the movement of documents. Usually, the movement scheme is a list of documents based on which documents are placed into (sub)functions / (sub)series. Thereafter, the list of documents is also inserted into WebDesktop (usually, in the directory of the register of documents). If the register of documents has been properly set up in advance, the documents will be accumulated in the desired (sub)series.

In WebDesktop, it is presumed that the list of documents has up to four levels (function, subfunction, series, subseries). The document number has the following format: **“FunctionNO.SubfunctionNO-SeriesNO.SubseriesNO/CounterNO”.** For instance, the number of a registered incoming letter may be “1.2-7.1/325”, which means that the letter has been registered in the first subseries of the seventh series of the second subfunction of the first function and its registration number is 325. The number may end with a dash and a number, which means that it is a reply, i.e. “1.2-7.1/325-1” is the first reply to the letter. Usually, documents are managed using a 2-level or 3-level list. This is up to the agency to decide. In addition to documents, you can also manage clients, contacts and other objects outside the list of documents in WebDesktop.

Adjustment of settings of preservation terms

The settings of preservation terms can be adjusted only by the desktop administrator. In WebDesktop, you can set a preservation term for every (sub)series. This takes place in the series addition/change form field “Preservation term” where you can choose the term from among pre-adjusted terms in a menu.

- To pre-adjust preservation terms, choose “Management” → “Desktop admin“ → “Choices“ in the top menu.
- In the opened choices window, open "Preservation term".

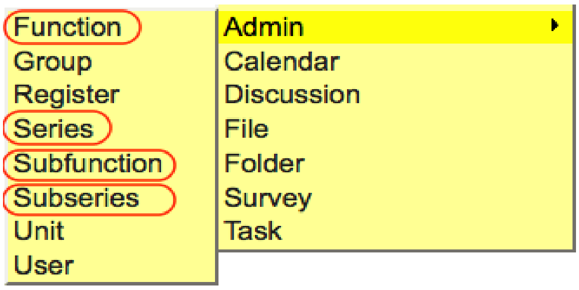
Management of functions and series

Functions and series are managed in the capacity of the standard administrator. All functions and series and other directories are managed via the tree located on the left.

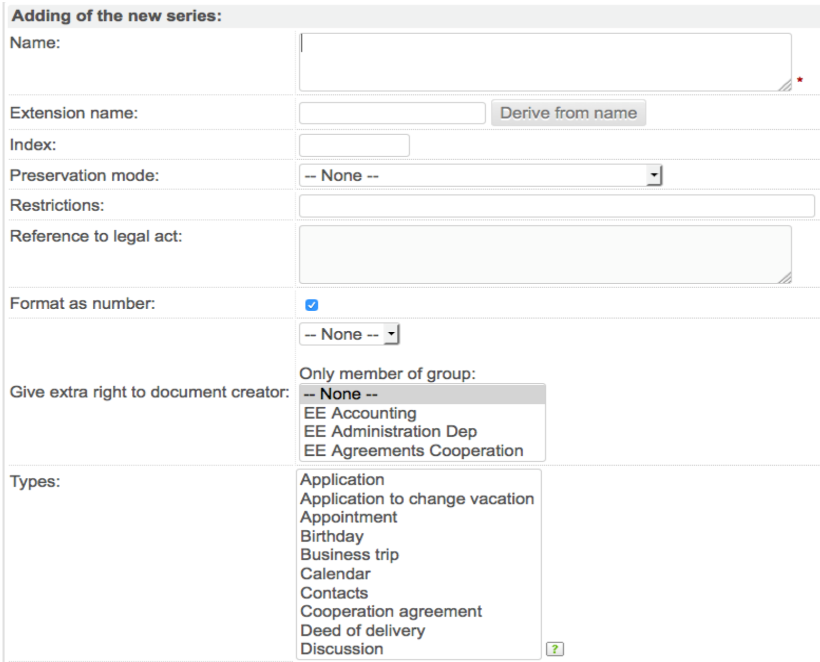
Functions and entry of series

Creation of the register of documents on the basis of the list of documents is an inevitable condition for the correct registration of documents.

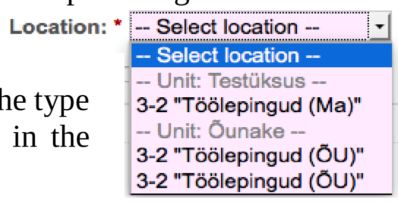
- First, create the directory of the register of documents.
- Once the directory has been created, go inside the directory and choose “Add new” → “Admin” → “Function”/“Subfunction”/“Series”/“Subseries” from the top menu.



The insertion form for functions, subfunctions, series, and subseries as well as, in fact, the directory, is the same:



- Name – the name of the function, subfunction, series or subseries;
- Extension index – as a rule, used for further developments; **Fill in/change only in the event of a specific need.** The existence of the field depends on the configuration settings;
- Index – the marking of the function, subfunction, series or subseries. **Numbers smaller than 10 must be given as 01, 02, 03, etc;**
- Preservation term - a menu of pre-set preservation terms;
- Restrictions – an informative field regarding (access) restrictions imposed on a function or series, e.g. “For internal use”, “Restricted”, etc;
- Reference to legislation – an informative field regarding the legal ground for the established access restriction, e.g. "clause 35 (1) 12) of the Public Information Act";
- Format as a number – if you have ticked the box, the index must contain numbers. If you untick the box, the index may also contain letters;
- Has archiving value – an informative field;
- Give special right to document adder – on the functionality of the special right see the access rights topic for further information;
- Types – data types based on which documents will be registered in the series. To choose multiple data types, use the CTRL key. The type selection made is indicated in the document registration form in the choice of the location.



Event

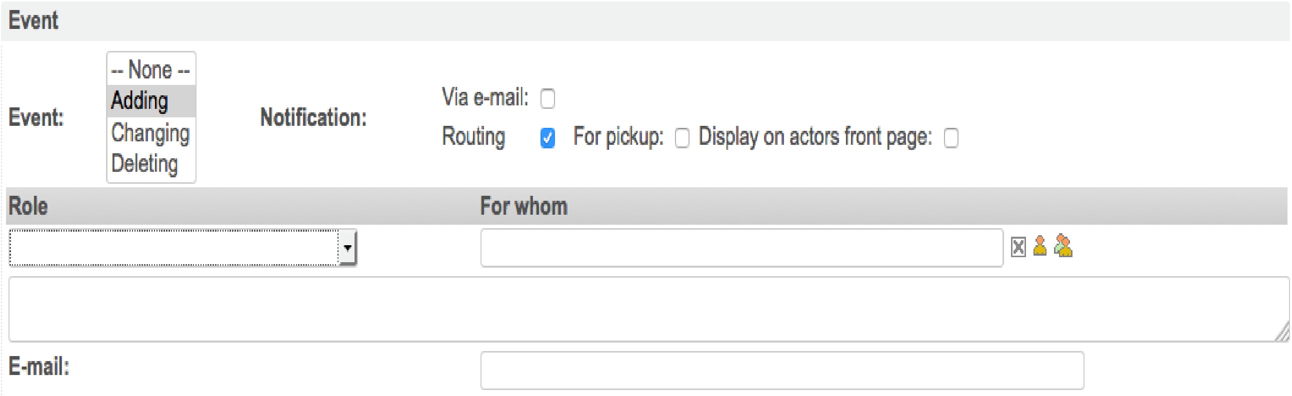
note	Switched off by default. Can be switched on in the configuration file.

For what?

The event may be of help in the following cases:

- if a document is added to the directory, automatic routing with a specific role (e.g. signature) should be created on the desktop of the designated user and/or a notification should be sent to the e-mail address;
- if a document is changed in or deleted from the directory, automatic routing with a specific role (e.g. signature) should be created on the desktop of the designated user and/or a notification should be sent to the e-mail address.

How to set up?



Event

- Addition – upon addition of a document, the system makes automated routing or sends an e-mail notification;
- Alteration – upon addition of a document, the system makes automated routing or sends an e-mail notification;
- Deletion – upon deletion of a document, the system makes automated routing or sends an e-mail notification.

Notification

- By e-mail – a notification is sent to an e-mail address.
- Routing – the user is informed of an added, changed or deleted document via the routing block on the desktop.
- For picking – if routing is chosen as the manner of notification and multiple users are or a group is chosen in the "To" field and "For picking" is ticked in the settings block, the person who is the first to pick up the task will be the executor of the routing task.
- Add to executor for monitoring – for a person who adds, changes or deletes a document, a traceable routing will be created in the “Other routings” block on the opening page.

Role

The role of routing or processing, which must be done with the routed document.

For whom

The user to whom automated routing is made.

In addition to users, you can choose the group for the "To” field. It is practical to choose a group so that event notifications will always reach the person occupying the respective position: when the employee changes, the group member is changed. To cancel the user and group choice, use a cross.

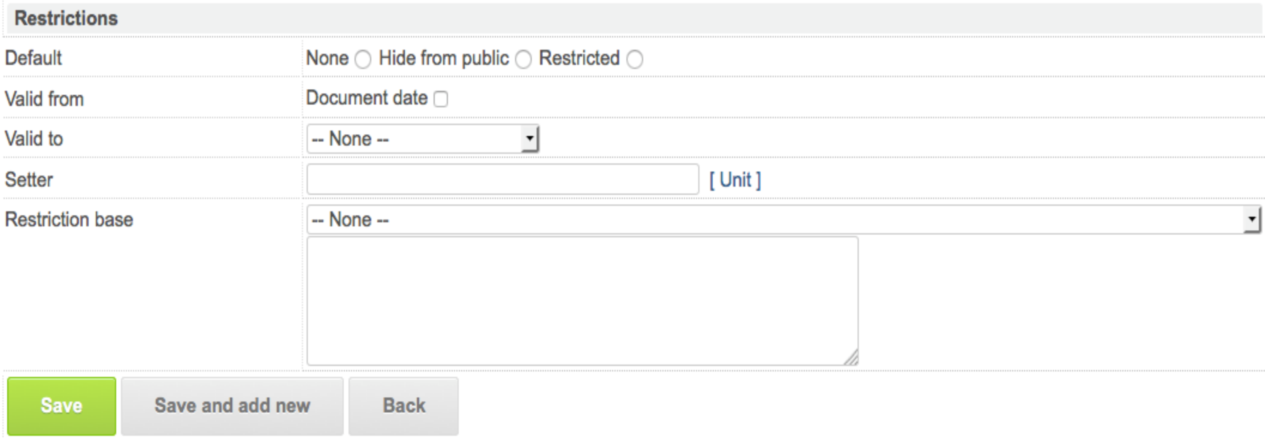
E-mail

The e-mail address where a notice of an added, changed or deleted document is sent.

Access restrictions

For what?

If the agency uses an interface for publishing documents, it may be necessary in the case of some series to pre-define the settings of the access restrictions either for the purpose of making the work of the registrar of documents easier or reducing human errors. Let us assume that documents subject to the access restriction arising from clause 35 (1) 12) of the Public Information Act are registered in the same series. Here, the aforementioned block of restrictions may prove a good solution.



How to set up?

To set up restrictions, move to the document tree.
Click on the “Change” button in the actions column of the (sub)series/directory.
The desktop administrator has the right to set up the restrictions block. In the user view, the choices in the restrictions block in the register card are as follows:

- None – there are no additional restrictions;
- Do not show in the public interface - the document is not shown in the public interface;
- Restricted – the document/object has a restriction to which a term of validity and scope can be set;
- Valid as of – valid as of a particular date;
  - Document saving date – upon registration of a document, the date of registration of the document is specified as the start date of the access restriction;
  - Valid until – valid until a particular date;
  - Basis for the restriction – a pre-defined reason for establishing the restriction.

Change of functions and series

Changing the register of documents in the system is not a day-to-day activity and should happen only if a new list of documents of the agency is approved.

- To make a change, click on a level right above the desired level in the tree, e.g. if you want to change the series, click on the name of the function containing the series.
- On the name row of the (sub)function/(sub)series, click on the “Change” button in the “Actions” column. In the case of the icon view, make a right-click of the mouse and choose "Change".
- Make the desired changes and save them.

Deletion of functions and series

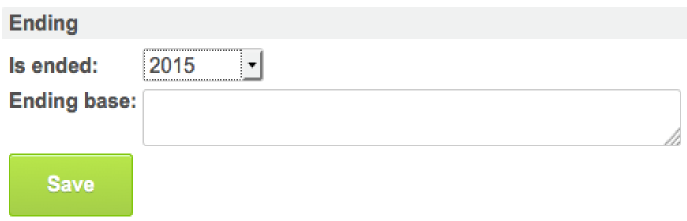
(Sub)functions/(sub)series should be deleted only if they have been saved by mistake and no document/object has been registered under them.

- To delete, click on the level right above the desired level of the list of documents in the tree.
- On the name row of the (sub)function/(sub)series to be deleted, click on the “Change” button in the “Actions” column. In the case of the icon view, make a right-click of the mouse and choose "Delete".

Termination of functions and series

For what?

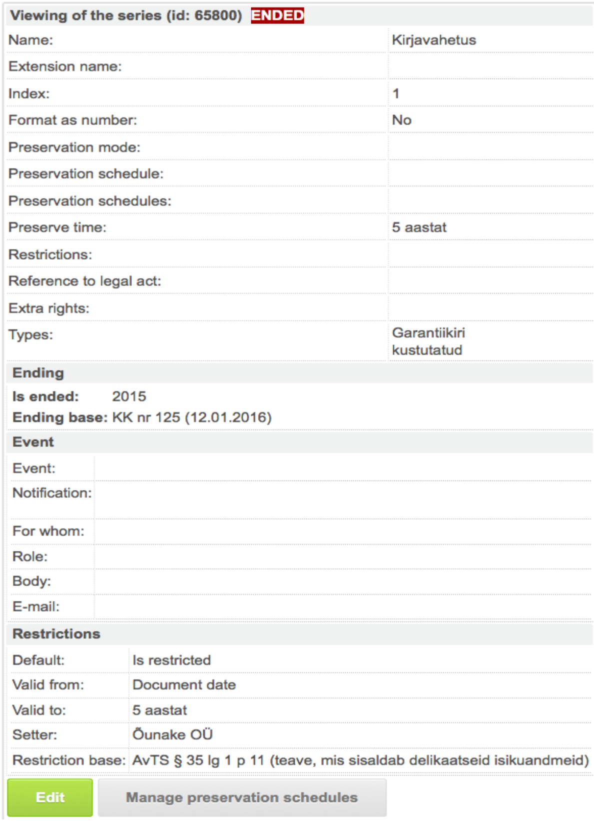
Active series are terminated or closed, which means that no documents/objects can be registered in them anymore.



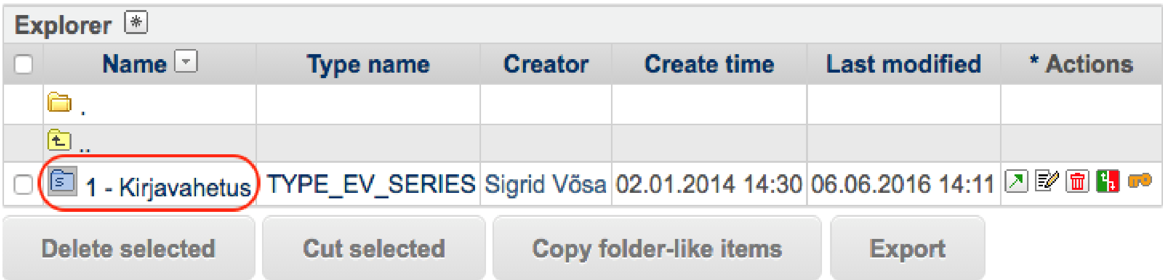
How to set up?

- To terminate, click on a level right above the desired level of the list of documents in the tree, e.g. if you want to change the series, click on the name of the function containing the series.
- On the name row of the (sub)function/(sub)series, click on the “Change” button in the “Actions” column. In the case of the icon view, make a right-click of the mouse and choose "Change" in the menu.
- In the “Termination” block, indicate the year of termination and insert the basis (reference to legislation or another instrument regulating termination).
- Save the changes.

In a terminated series, the status “ENDED” is displayed.



Terminated (sub)functions/(sub)series are not indicated in the tree. These can be seen solely in the list view (by clicking a level right above the desired level of the list of documents in the tree). A grey frame  is displayed around the icons of terminated (sub)functions/(sub)series.



Data type management

For what?

In order to register documents (contracts, directives, etc.) and insert information (e.g. on contact agencies), data types need to be created.

There are two different data types in WebDesktop:

- static data types (in the system by default);
- dynamic data types (data types added by the desktop administrator based on the agency’s needs).

Static data types are, for instance, the user map, document register classification unit (function, subfunction, series…), calendar, etc. The desktop administrator cannot change the composition of the data fields of static data types.

Dynamic data types are, for instance, document registration forms (correspondence, contract, instrument), registration forms of contact agencies and all kinds of other data forms the creation of which is deemed necessary by the agency.

Subtypes can be created for data types (see below).

How to set up?

- To open the data type settings window, move the cursor to the “Management” menu in the upper right-hand corner → “Desktop admin” → and click on “Types”.
- To add the data type, choose the “Actions” upper menu → “Add new type”.

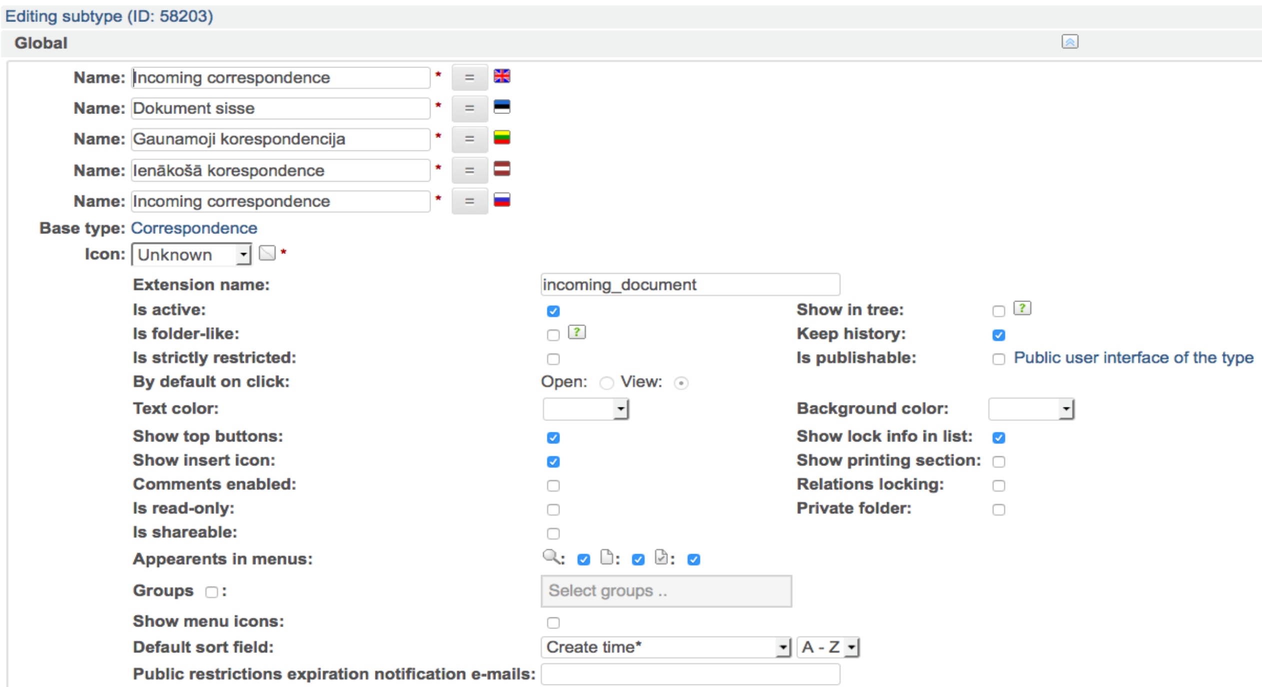
There are 12 settings blocks in the opened type settings:

- “General”;
- “Routing”;
- “Duplicating”;
- “Archiving”;
- “Versioning settings”;
- “Fields”;
- Dynamic name rules;
- “Printing grounds”;
- Adding a new ground;
- “Connections”;
- “Notices”;
- “Addition/change of new additional information”.

“General”

> Please note: The overall view depends on the configuration settings. If a functionality is missing in your system, it has probably not been activated. To activate a functionality, contact the user support of WebDesktop.

- **Name** – the name of a data type in different languages.
- **Subtype** – allows for moving from a data type at the main level to a subdata type.
- Icon – to visualise the data type, you can pick an icon that will be displayed in three main menus (“Search”, “Find new”, “Management”) before the name of the data type. You can display a respective icon before the respective object (if the “Show in tree” field is ticked).
- **Extension name** – the field is visible if the extensions are permitted in the configuration and it ids filled in if some further development (incl. the new [contacts](#) register of the standard) is in use.



- **Is active** – displayed in submenus “Search”, “Find new” and “Management”.

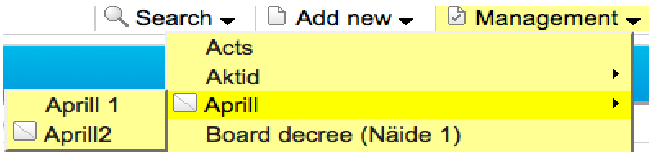
- **Show in tree** – the data type is displayed in the tree.
- **Is of directory type** – the object functions as a container, i.e. the object may contain subobjects and access rights can be granted to the objects. If, for instance, the contract type is of the directory type and an annex to the contract is registered for it as a reply and at least one location has been set for it, the rights will not transfer from the original. However, if no location has been set for the annex to the contract, the rights will also be inherited from the original of the directory type by the reply (i.e. the annex to the contract).
- **Keep history** – the "History" block is shown in the entry view form.
- **Strictly limited** – creates a restrictions block for a document entry so that undesired information is not displayed in the public interface.

- **Can be published** – the data type is displayed in the public interface.
- **By default upon clicking** – can be adjusted if the field "Is of directory type" has been ticked. Determines whether the contents of the directory or the directory data view is opened upon clicking on the (sub)type link given in the tree. The choice is active only if "Is of directory type" has been switched on.
- **Text colour** – determines the colour of the text displayed in the list view of the documents/objects registered under the (sub)type.
- **Background colour** – determines the colour of the background of the text displayed in the list view of the documents/objects registered under the (sub)type.
- **Show top buttons** – the activity buttons "Change", "Add comment", etc. are displayed in the upper edge of the document entry. It is practical to display the top buttons at the upper edge of the entry if the entry form has many data fields.
- **Show lock information in list** – in the list view of the (sub)type, the lock information related to the entry is displayed (the name of the locker and the date of locking). If lock information is indicated in the list view, searches in the detailed search form can also be made based on the lock information.
- **Show addition icon** – determines whether the addition icon is displayed at the top of the list view of the (sub)type or not. Please note: if the (sub)type is "Read only", the icon will not be displayed.

- **Show print block** – determines whether print templates can be used in the document entry ("Print" block) with the help of which a document can be created from register data.
- **Comments activated** – determines whether any additional buttons "Add comment" and "View comments (number)" are displayed in the register card of the saved entry/document of the respective (sub)type (the last button is active in the case a comment has been added).
- **Move to private directory** – the application of a private directory can be considered, for instance, if the documents are located in a series that is either public or accessible to a larger number of users, but whereby exceptions should be made to single documents (mark the as private), so that they would be visible only to the person who moved the documents to the private directory or to a group holding the respective rights.
- **Can be shared** – allows for sharing documents by e-mail to an external party (client, contractual partner, contractor, etc.); thereby determining whether the external party can merely read the document or also sign it.
- **Locking connections** – if an entry that has entries in connections is locked, the entries in connections will be locked as well.
- **DVK type** – the document exchange centre can be used by public sector authorities (ministries,

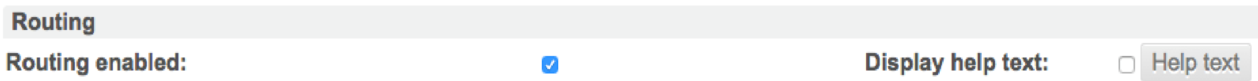
local authorities, health care and child care institutions, etc.) in order to exchange documents, letters and e-mail messages between themselves.

- **Read only** – determines whether a specific (sub)type can be added or not via the “Add new” menu. Advisable to set to an underlying type that has subtypes (e.g. you could designate the correspondence data type as “Read only”, so that the user could not register documents for the correspondence data type. The user must choose the suitable one from among the subtypes, i.e. either an incoming or outgoing document.
- **Appearance in menus** – you can determine in which upper menu the (sub)type is displayed. Usually, the (sub)type should be marked as visible in all the three menus. Exceptionally, there may be situations where a new document should be registered right from the register card of another document and does not need to be displayed in the menu directly.
- **Groups** – the possibility to set groups to a data type, which allows for filtering out the given type in different views based on user groups. By default, the type is visible to everyone. Upon selecting the group, the type will be visible only to the chosen groups and the group membership is also taken into account in desktop administrator rights. To make the adjustments, 1) tick "Groups" and 2) find the desired groups.



- **Display icons in menu** – determines whether the icon chosen in the “Icon” field is displayed in top menus.
- **Default sorting field** – determines based on which condition the documents/objects are displayed in the list view (by default, they are set based on the time of creation).
- **E-mail messages informing of expiry of publication restriction** – once the date of expiry of the restriction established on documents is about to arrive, a notice will be sent to the inserted e-mail address(es). The frequency of notification is, by default, once a week (the IT administrator can change it, where necessary). The notification contains the document's ID, name (based on the dynamic name rules) and details on restrictions. If multiple e-mail addresses are inserted, the addresses are separated by a comma.

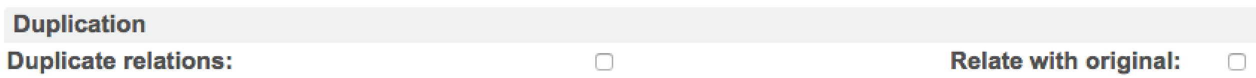
“Routing”



Routing means the processing of documents. With the help of the routing functionality you can compile a workflow whereby the order of the people and their roles (e.g. formaliser, coordinator, approver) are established.

- Routing activated – you can determine whether documents registered from the data type can be aimed or not (if routing is activated, the routing block will be displayed on the document registration form).
- Display helptext – the helptext inserted by the desktop administrator is displayed to the router of the document.

“Duplicating”

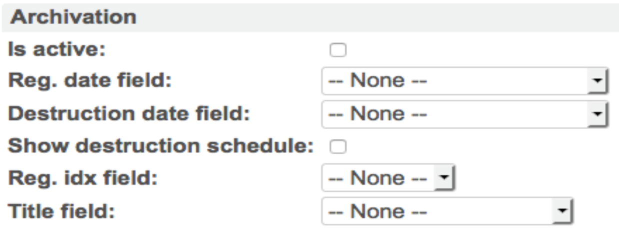


Duplication allows for quickly registering many documents with the same content by creating a new duplicate (counterpart) of a saved document. The contents of the fields indicated as fields that can be duplicated are copied to the new counterpart. For further information on the duplication of fields see here. The “Duplicate” button is created in the screen form of a document if at least one field has been marked as one that can be duplicated (i.e. “Copy on duplication” has been chosen in the settings form of the field). You can also choose between the following functionalities:

- Duplicate connections – upon duplicating the document, also the connected documents are duplicated.
- Upon duplication of a document, the document will always be connected to the document from where the duplication started.

“Archiving”

All data types of a document based on which documents must be archived have to be adjusted for archiving in data type management. It is a one-off activity. In the “Archiving” block, the field “Is active” must be ticked and three prescribed fields must be set: “Reg. date field”, “Counter index field” and “Title field”.



“Fields”

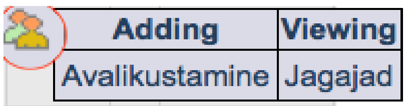
List of fields saved as a table, which is used by a (sub)type.

Fields

Name	Is base field	Base field name	Type	Extension name	Is required	Is searchable	Detail	Show in listing	Is publishable	Group	JS	Actions
Reg no	Yes	Reg no	regindex	reg_no	Yes	Yes	Yes	Yes	No		Yes	
Registration date	Yes	Registration date	date	registration_date	Yes	Yes	Yes	Yes	No		No	
Way of dispatch	Yes	Way of dispatch	selection	way_of_dispatch	Yes	No	Yes	No	No		No	
Sender	Yes	Sender/Receiver	contacts	sender	Yes	Yes	Yes	Yes	No		No	
Sender´s reg number	No		text	senders_reg_number	No	Yes	Yes	Yes	No		No	
Sender´s document date	No		date	senders_document_date	No	Yes	Yes	Yes	No		No	
Title	Yes	Title	text	title	Yes	Yes	Yes	Yes	No		No	
Author	No		text	author	No	Yes	Yes	Yes	No		No	
Signed by	No		text	signed_by	No	Yes	Yes	Yes	No		No	
Content	Yes	Content	mltext	content	No	No	Yes	No	No		No	
Document	Yes	Signed document	file	document	No	Yes	Yes	Yes	No		No	
List of appendixes	Yes	List of appendixes	text	list_of_appendixes	No	No	Yes	No	No		No	
Appendixes	Yes	Appendixes	mlfiles	appendixes	No	Yes	Yes	Yes	No		No	
Answer required/Not required	Yes	Answer required/Not required	sysfld	answer_required_not_required	No	No	Yes	No	No		No	
Deadline date	Yes	Deadline date	date	deadline_date	No	Yes	Yes	No	No		No	

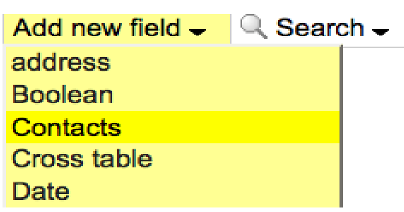
Add base fields | Delete selected | Change fields order

- **Name** – the name of the field.
- **Type** – the type of the field.
- **Name of extension** – used for special developments.
- **Required** – mandatoriness of the field.
- **Searchable** – the searchability of the field in the simple search form.
- **Detailed** – the searchability of the field in the detailed search form.
- **Show in list** – the displaying of the field in the list view.
- **Publishable** – the displaying of the field in the public register of documents.
- **Group** – groups with access to the given field. If some rights have been set to a field, the icon will be displayed. Upon moving the cursor on the icon, the attributed rights will be shown.



- **JS** – information on whether the field contains JavaScript or not. The column is displayed only on the main type, not on a subtype.
- **Actions**.
  - – Opens the field settings adjustment form.
  - – Upon disconnecting the underlying field, the field is removed among the fields of the subtype.

You can add fields if you choose “Add new field” from the top menu located right below the top bar.



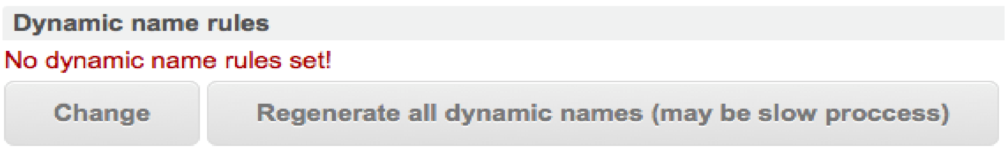
The field types used are as follows:

- Address
- E-mail
- Group
- Homepage
- Date
- Counter index
- Multiple user choice
- Multiple-row text
- Number
- Cross-table
- Text
- Single user choice
- Invoice rows
- File
- Yes/No
- Contacts
- Date and time
- Multiple file field
- Multiple value choice
- Keywords
- Picture
- Systemic field
- Choice
- Choice of one object

For further information on field settings see the chapter "Fields".

Dynamic name rules

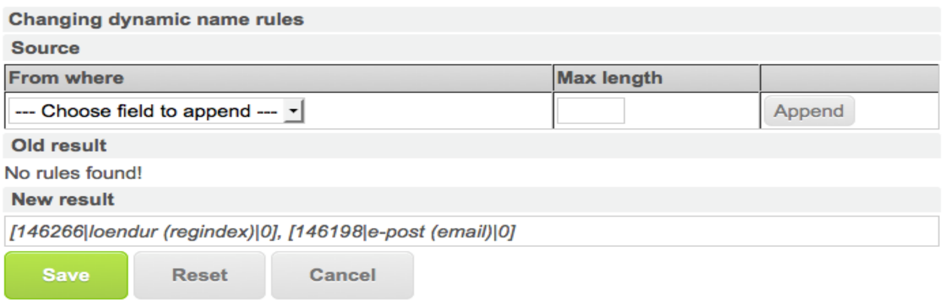
Dynamic name rules determine in which form the data of a document/object is displayed in, for instance, on the opening page in the routing block, in the list view, in the object selection, etc. The dynamic name rule also influences the effectiveness of the global search window, because global search is made from among fields added to the dynamic name rules.



Adjustment of the dynamic name rule

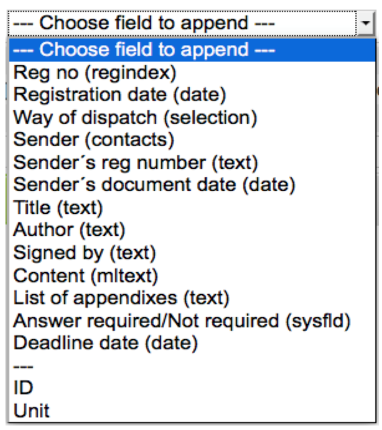
To set the dynamic name rule, click on the “Change” button of the dynamic name rules block in data type management.

A window will be opened where you can create the displayed name of the document/object, which may consist of fields added to the data type and the punctuation marks and symbols available on the computer’s keyboard.



To create the dynamic name rule indicated in the picture, do the following:

- click on the drop-down menu “Choose field to be added” → choose “Reg. code (counter index)”;
- click on the “Add” button;
- to add the punctuation mark “,” and a space, use the keyboard;
- click on the drop-down menu “Choose field to be added” → choose “Title (text)”;
- if necessary, limit the length of the text displayed in the reg. code field. To do so, insert character number "25" in the "Max. length" field;
- click on the “Add” button;
- click on the drop-down menu “Choose field to be added” → choose “Reg. date (date)”;
- click on the “Save” button.



Type ID and unit name

In the dynamic name rule, you can add the type ID and the name of the unit.

Readjustment of the dynamic name rule, incl. in old entries

At one point it may become evident that the top bar search does not render the desired results in the case of a data type and that the dynamic name rule should be adjusted. To that end:

- the dynamic name rule must be inserted from scratch (see the previous section);
- once the dynamic name rule has been updated, the button "Regenerate all dynamic names (may be a slow activity)" must be clicked on.

"Printing grounds"

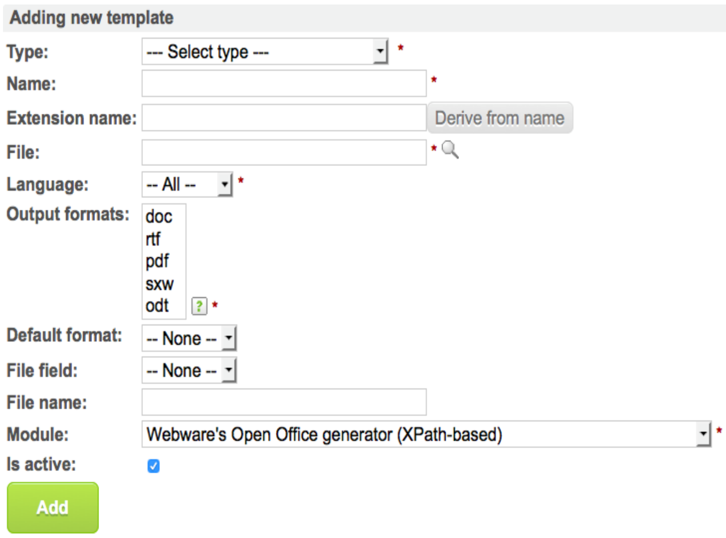
Printing templates

A	D	Type	Name	Extension name	File	Language	Module	Output formats	Default format	File field	File name	Is active	Actions
		Deed of delivery	Akt_ÜV_Väline	akt_yv_valine	Template_Akt_UV_Valine.odt	et	ww_xp_oogen	doc,pdf,docx	docx	Signed document		Yes	
		Outgoing correspondence	EE Vastuskiri	ee_vastuskiri	seesam_vastuskiri.odt		ww_xp_oogen	doc,pdf,odt,docx	pdf	Signed document		Yes	
		Outgoing correspondence	EE algatuskiri	ee_algatuskiri	seesam_algatuskiri.odt	et	ww_xp_oogen	doc,pdf,odt,docx	pdf	Signed document		Yes	

The list of print templates added to the (sub)type in the form of a table.

The printing grounds are meant for the automatic creation of documents for a document template. For further information see "Print templates".

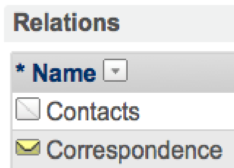
Adding a new ground

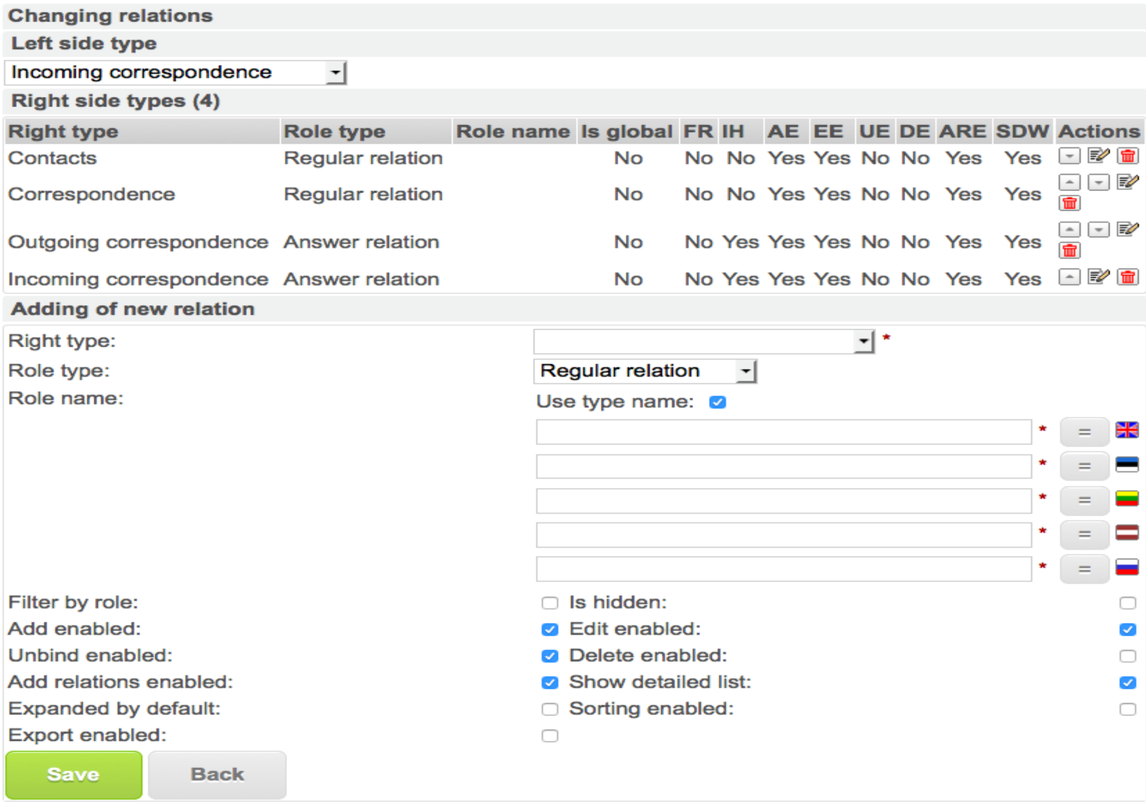


- Name – the name of the printing ground is displayed in the view form of the registered document entry in the printing grounds block.
- File – binding the print template to the printing grounds block;
- Language – the language of the print template.
- Output formats – possible file formats in which a document can be created.
- Default format – the file format in which the document is created if the user has not made a format choice.
- File field – you can set up whether the user can choose in which registered entry field the file is saved.
- File name – you can pre-define the file name of the document to be created and add the date and time at the end (if the file name is not set, the file will get a name based on the dynamic name rule and the date and time will be added at the end).
- Module – the newer versions of WebDesktop use the printing grounds module of Webware's Open Office generator (XPath-based), which has been pre-defined by default for the desktop administrator.
- Active – if ticked, the printing ground is active.

"Connections"

To add a new connection, click on "Change". The connections adjustment window will be displayed. It allows for associating one data type with other data types.





"Left-side type"

With the help of this block you can adjust which data type you will add connections to other data types.

"Right-side types"

If connections are added to the data type, these will rather be displayed in the list of right-side types.

Abbreviations in the list of associated data types and their meanings:

Abbreviation	**Meaning**
FR	Filter by role
OP	Hidden
LL	Allow to add
LM	Allow to change
LLS	Allow to disconnect
LK	Allow to delete
LSO	Allow to bind to the existing
NDV	Show in detailed view

"Adding new connection"

To add a new connection, the following choices must be made:

- Right-side type – selection of additional data types that can possibly be associated with;
- Role type – settings determining how data type entries will be associated:
  - Ordinary connection – no special characteristics;
  - Reply connection – involved in enumeration of a connected object, e.g. in the case of correspondence, the automatic enumeration of reply letters (the reply letter gets the number of the opening letter and order number -1, etc. is added to it). In such an event the types can be, for instance, "Incoming document" and "Outgoing document". In the case of a reply connection, the addition of a reply document using the document view form is

indicated separately.

- Connected document – an ordinary connection in the case of which the quick addition of a connected document in the document view form is indicated as a separate choice. The document obtains a new independent registration number upon registration.
- Signed document - converted into the .bdoc format for the purpose of connecting documents.

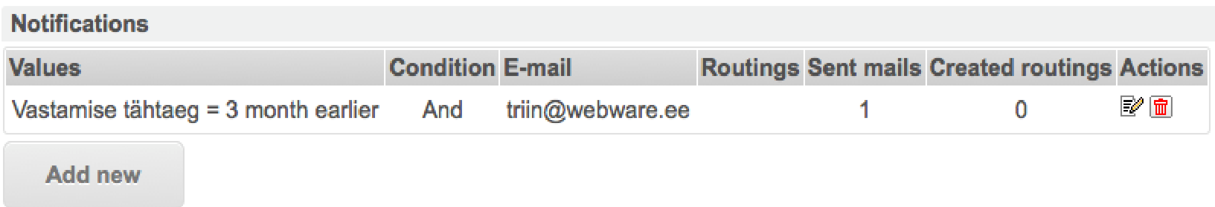
Owner's connection – a historic quality that is preserved for the purposes of compatibility. It is advisable not to use it.

- Role name – the name that is displayed in the register card in the titles of connection blocks.
- Use type name – by default, it is set so that the type name is used as the role name.

The following choice of settings depends on the wishes and needs.

- Filter by role – if the field is ticked, only connection documents connected to the respective role will be displayed in the block of the connections of the entry. If the field is not ticked, all the documents of the given data type will be displayed in one block.
- Hidden – the connections block is not shown.
- Allow to add – the button "Add new" is displayed in the connections block, which allows for adding new entries via the connection.
- Allow to change – creates the "Change" button in the connections block with the help of which the associated document can be changed.
- Allow to disconnect – creates the connections block button "Disconnect selected", which can be used to disconnected previously connected entries.
- Allow to delete – creates the "Delete" button in the activities column in the connections block. The button can be used for deleting previous connected entries.
- Allow to connect to existing – creates the button "Add connections" to the connections block.
- Show in detailed view – all the fields of the data type indicated in the "Show in list" are displayed.

"Notices"


Notifications

Values	Condition	E-mail	Routings	Sent mails	Created routings	Actions
Vastamise tähtaeg = 3 month earlier	And	triin@webware.ee		1	0	

Add new

For what?

The notices block allows for drawing up automatic notices that are sent to the user on the right day based on the pre-defined conditions. In practice, notices are used, for instance, in the case of contracts if an automatic notice of the expiry of the validity of a contract is requested.

How to set up?

As a rule, it is set up in such a manner that notices are sent once a day and usually early in the morning (e.g. at 5:00 a.m.). The notice time and the frequency of sending them can be changed. Upon changing the time (e.g. making it much later), you should take into account when the users may most easily learn of the due dates of the documents or other notices.

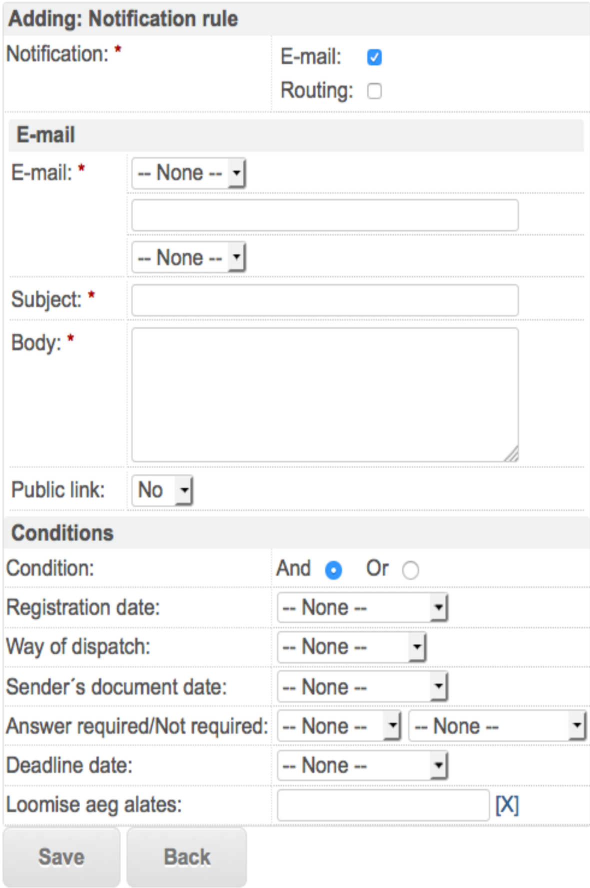
One notice is sent per document. If the notification rule is changed or a previous rule, according to which a notice has already been sent, is overridden, the document will be covered by the same rules again.

To create a new notice, click on the "Add new" button. A window for drawing up a notice will be opened.

Notification

E-mail – a notice on the document is sent by e-mail.

Routing – the document is routed.

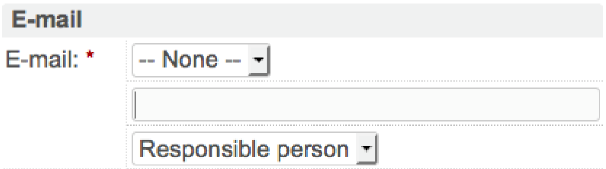


"E-mail"

The block appears if e-mail is chosen as the manner of notification.

- E-mail:

1. an e-mail address type of field can be set up and a notice is sent to the e-mail address specified therein. In the notification settings, only fields of



   the e-mail address type are displayed in the field and provided that a field of such type has been added to the data type.
2. E-mail addresses where notices are always sent can be specified in the field. The e-mail addresses must be separated by commas.
3. A field of the single user type can be set up in the field and a notice is sent to the user account located therein. In the notification settings, only fields of the single user type are displayed in the field and provided that (a) field(s) of such type has (have) been added to the data type.

- Subject - the subject of the notice sent by e-mail.
- Content - the content of the notice sent by e-mail.
- Public link – the notice link refers to a public interface (for further information, see here).

"Routing"

The block appears if routing is chosen as the manner of notification.

Role – the routing role.

Who – by whom the routing is executed.

Content – additional information on the routing task.

For picking – the task is sent for execution to multiple people and only one will execute it, i.e. the first one to pick the task.

"Conditions"

Condition – you can determine whether to send a notice once all the conditions have been fulfilled (select "Yes") or if one of the conditions has been fulfilled (select "Or").

The following choices of the fields in the conditions block depend on the composition of the fields of the data type.

For instance, it may be necessary for the system to send an automatic e-mail notification if the entry calls for a reply, but it has not been replied to.

- To that end, select "Yes" in the condition row.
- In the cell "**Reply term**", choose how many days before the closing date an e-mail notice will be sent.
- In the field "**Calls/does not call for a reply**", leave the status as "None" in the first cell and choose

"Calls for a reply" in the second.
- In the field "**Creation time as of**" you can set up as of which date the created documents are involved in the notification rules. If you do not set a date, all the documents of the data type will be included in the rules.
- The conditions must be saved.

"Addition/change of new additional information"

A chance to insert an additional tip.

- Tip – text that is displayed as a tip at the top of the register card next to the name of the (sub)type. If the address has been inserted in the URL row, the text will act as a link as well.
- URL – the address of the tip link (e.g. a link to a directive registered in WD or an external web address). The URL is inserted in the following form: External address – e.g. http://www.postimees.ee.

WD internal file: e.g. https://kov.webware.ee/?page=pub_dynobj_file&pid=23247&fileid=23248. To get the file link, right-click on the file name and choose "Properties" from the menu. In the opened window, copy the URL to the field from the "Address: (URL) link". WD internal register card: e.g. https://kov.webware.ee/? wdsturi=page%3Dview_dynobj%26pid=23247. In the list view, mark the document/object with a tick and click on "Send link", after which the e-mail sending window will be opened. From the content field, copy a link to the URL field.

- Action – possible to choose on which activity form and in which language user interface to display the help information. You can choose multiple actions by holding down the Ctrl key.
- Help information is displayed to the user based on the settings (either on the addition, change, view form) at the beginning of the register card after the name of the (sub)type (keeping the cursor on the question mark, help information is displayed in a yellow box; if the URL has been inserted as well, the text will act as a link).

Addition and setup of a subtype

For what?

Subtypes allow for categorising information to be inserted. In this way, it will be easier to search for and manage existing information. There are many categorisation opportunities. Categorisation by document types is widespread:

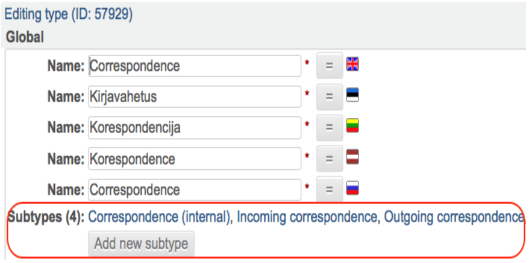
- Directives
- Business trip directives
- Staff directives
- Holiday directives
- Principal activity directives

By default, subdata types are indicated in the menu a level below the main type from which the subdata type was added.

> It is advisable to add to the main data type all possible data fields that are to be used on the subdata type later. Thereafter the desired fields can also be easily derived for the subdata type.

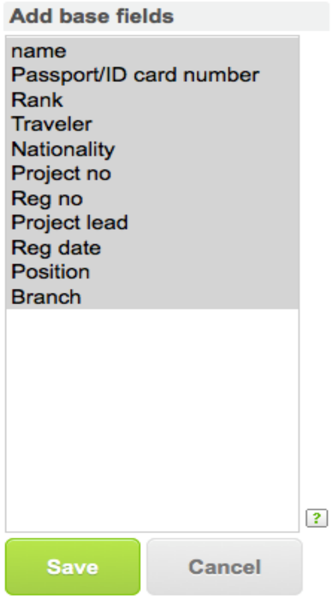
How to set up?

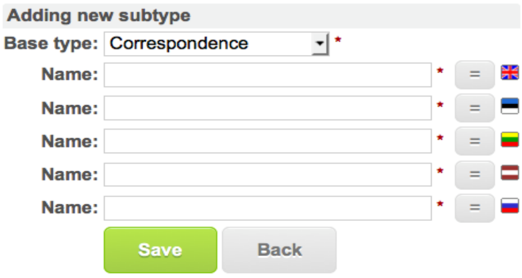
Go to the settings of the data type to which you wish to add a subdata type. For instance, choose “Management” → “Data type x” → click on the “Change type” button. Type change window will be opened. To add a new subtype there, click on the "Add new subtype" button.



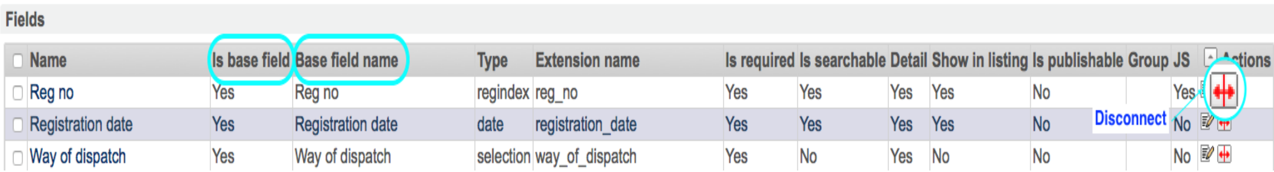
In the “Add new subtype” window, give the subtype a name. If you wish, add a translation. Click "Save”.

A window for the addition of underlying fields will be opened and it will, by default, transpose all the data fields of the main type. To cancel a data field in the selection, hold down the Ctrl key and click on the field name. Click on the “Save” button.





If you wish, you can remove the data field derived from the main type. To that end, move to the list of saved fields and click on the “Disconnect” button in the column of activities.



Adjustment of the settings of fields

Upon insertion of all field types (text field, single user field, etc.), the fields have similar settings opportunities, except for the “Look” block that depends on a specific field type.

How to set up?

Adding a new field

Open the settings of a data type. Choose “Management” → “Desktop admin” → “Types” → “Data type X”.
Click on the “Add new field” button in the right-hand corner directly under the top bar.

Changing field settings

Option 1. Choose “Management” → “Desktop admin” → “Types” → click on the name desired type and in the opened data type settings move to the block “Fields”. Click on an added field.

Option 2. Choose “Management” → click on the button “Change type” and move to the block “Fields”. Click on an added field.

Fields

Name	Is base field	Base field name	Type	Extension name	Is required	Is searchable	Detail	Show in listing	Is publishable	Group	JS	Actions
Reg no	Yes	Reg no	regindex	reg_no	Yes	Yes	Yes	Yes	No		Yes	
Registration date	Yes	Registration date	date	registration_date	Yes	Yes	Yes	Yes	No		No	
Way of dispatch	Yes	Way of dispatch	selection	way_of_dispatch	Yes	No	Yes	No	No		No	
Sender	Yes	Sender/Receiver	contacts	sender	Yes	Yes	Yes	Yes	No		No	
Sender´s reg number	No		text	senders_reg_number	No	Yes	Yes	Yes	No		No	
Sender´s document date	No		date	senders_document_date	No	Yes	Yes	Yes	No		No	
Title	Yes	Title	text	title	Yes	Yes	Yes	Yes	No		No	
Author	No		text	author	No	Yes	Yes	Yes	No		No	
Signed by	No		text	signed_by	No	Yes	Yes	Yes	No		No	
Content	Yes	Content	mltext	content	No	No	Yes	No	No		No	
Document	Yes	Signed document	file	document	No	Yes	Yes	Yes	No		No	
List of appendixes	Yes	List of appendixes	text	list_of_appendixes	No	No	Yes	No	No		No	
Appendixes	Yes	Appendixes	mlfiles	appendixes	No	Yes	Yes	Yes	No		No	
Answer required/Not required	Yes	Answer required/Not required	sysfld	answer_required_not_required	No	No	Yes	No	No		No	
Deadline date	Yes	Deadline date	date	deadline_date	No	Yes	Yes	No	No		No	

Add base fields | Delete selected | Change fields order

Summary table of fields

The following information is displayed in the summary table of fields (see the screenshot above).

- Name – the name of the field.
- Type – the type of the field.
- Name of extension – used for special developments.
- Required – mandatoriness of the field.
- Searchable – the searchability of the field in the simple search form.
- Detailed – the searchability of the field in the detailed search form.
- Show in list – the displaying of the field in the list view.
- Publishable – the displaying of the field in the public register of documents.
- Group – groups with access to the given field.
- JS – information on whether the field contains JavaScript or not. The column is displayed only on the main type, not on a subtype.

Deriving a field located on a subtype from the main type

For what?

If the system has an underlying type or base type that may get relatively many subtypes with quite similar data fields in the future, it is wise to create as many data fields as possible for the base type. From the base type you can easily add fields for subtypes.

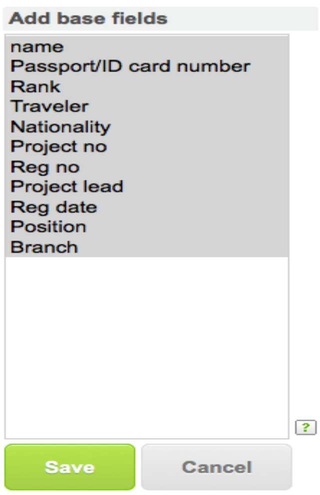
How to set up?

Open the settings of the data type of a subtype and scroll to the “Fields” block.

Click on the button “Add base fields”.

Choose the fields that you want to transfer to the subtype. To choose multiple fields, hold down the Ctrl button.

If the choices have been made, click on “Save”.

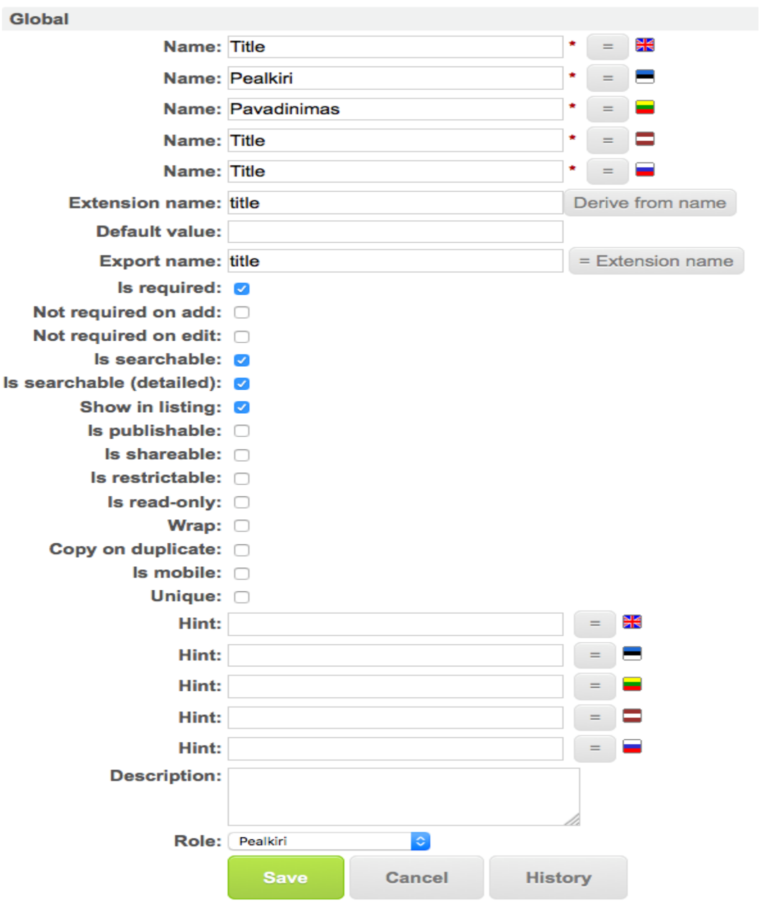


Next, we will list all the similar settings options available in the form for insertion of all field types (block by block in the order of appearance).

"Global"

Global settings of the fields.

- Name – the name of the field displayed on the register card.
- Name of extension – filled in if the field is related to some further development.
- Default value – determines the value of the field filled in by default (pre-defined), e.g. "+372" in the case of a telephone number, so that you do not need to add this country code upon adding a number. See the section on default settings of the date field and the date and time field.
- Export name – determines the export name of a field, which is used in WD's internal exports (XML and Excel) for identifying data. This is necessary, for instance, upon making templates as well as upon exporting lists to Excel.
- DVK type – a selection of fields transmitted via DVK. Determines whether the field is transmitted via DVK.
- Required – determines whether the field must be filled in or not upon addition/change. Mandatory fields are displayed with a red asterisk for the user.



Exceptions to the mandatoriness of fields

- Not required upon addition – adjustable if the "Required" field is ticked. The field is mandatory, but not upon adding a document.
- Not required upon changing – adjustable if the "Required" field is ticked. The field is mandatory, but not upon changing a document.

Searchability of fields

- Searchable – determines whether the user can search in the simple search form or not based on the field.
- Searchable (detailed) – determines whether the user can search in the detailed search form or not based on the field.

Display of a field in the list view

Show in list – determines whether the field appears in the (sub)type list view.

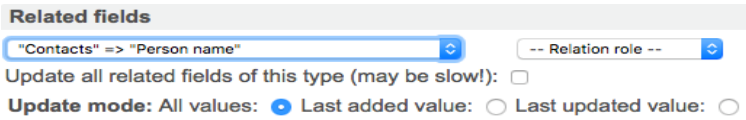
Publication of a field

- Publishable – determines whether the field can be published. See also the settings of the "Restrictable" field. Also read on publication.
- Restrictable – determines whether the field can be restricted. This setting is related to the setting "Publishable". If "Publishable" and "Restrictable" are switched on, the contents of the field are not displayed upon publication, provided that the object has been restricted.

Field automation

- Read only – determines whether the field can be manually filled in and changed. If it has been ticked, the field can be changed only with the help of internal tools (e.g. by an extension, etc.).
- Field name wrapping – determines whether the names of the field can be automatically wrapped or not. Useful especially in the case of longer field names.
- Copy upon duplication – determines whether the information contained in the field is transferred upon duplication to the created duplicate (i.e. counterpart). For further information on duplication, see here.
- Unique – determines that information entered in the field in the framework of the (sub)type may exist only once (e.g. used in the registry code fields of clients so that there would not be duplicate entries per client).
- Tip – tips in the given languages for filling the field. Attributes a tip for the field, which will later be displayed in the document/object addition/change form behind the respective field as a question mark "?" and a tip will be displayed if you move the cursor on the question mark.
- Description – an informative field only for the desktop administrator (which field, etc.). Not indicated in the ordinary user views.
- Role - determines the role of the field. Via the roles of the field it is possible to bind "similar" fields and, through that, automatically fill in fields (e.g. in the case of correspondence the data of the sender can be automatically transferred from the initiating letter to a reply letter).

"Connected fields" or mirroring



Connected fields determine the so-called mirror field source. Upon determining a related field, data is taken from a connected field. The field is not displayed in the addition/change form, but filled in automatically and displayed only in the view form.
Role of connection – the chance to additionally filter which object with a role of connection is mirrored on the map.

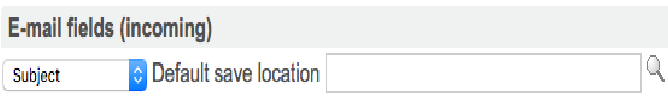
"Update all the related fields of the type (may be a slow activity!)" - Upon determining the connected field (according to the chosen renewal regime), updates the values of the mirror fields of the objects.

Update regime:

- All values – all data of the documents/objects in the connections are updated (default settings). Please note: You cannot use it in the case of a date!
- Recently added value - the data of the connected field are taken from the connection that was created in and added to the system the most recently.
- Recently changed value - the data of the connected field are taken from the most recently changed connection.

> Please note: The registry code field can be mirrored only in the case of an ordinary connection.

"E-mail fields (incoming)"



In order to register letters received by e-mail directly from, for instance, Outlook to WD, it should be determined which fields of the incoming e-mail message are transferred to the respective (sub)type fields.

Open the desired data type management ("**Change type**").
Scroll to the "**Fields**" block.
Open the field to which the data should be transferred.

Click on the selected field “Select field”. The following table indicates how the WD fields could correspond to the traditional e-mail fields.

Sub-type “Received document” fields in WD	**E-mail fields (incoming)**
Title	Subject
Content	Content
Sender’s e-mail	From

“Default saving location” – the possibility to determine in which directory in the tree (incl. list of documents) the received e-mail will be saved by default.

“E-mail fields (outgoing)”

You can adjust from which WD data fields the information is taken and automatically transferred to the fields of an outgoing e-mail message. You can add multiple WD data fields to one e-mail message field (e.g. in the content field of the e-mail message you can add the registration date, registration number, title, content, etc.). Each data field starts from a new row.

Open the desired data type management (“**Change type**”).
Scroll to the “**Fields**” block.
Open the field from which the data should transfer to the WD e-mail message window.
Click on the selected field “Select field”. The following table indicates how the WD fields could correspond to the traditional e-mail fields.

Title	Subject
Content	Content
Recipient’s e-mail	To:
Digitally signed file	File 1

Upon selection of data fields in the content cell, they are displayed in the e-mail window in the same order as set up in the data type.

“Group filter”

The chance to determine field-based rights through which you can grant the right to see/change/delete the fields only to selected groups. To grant the rights, the groups holding the right must be selected in the box of the respective right (Addition, Viewing, Changing). To choose multiple groups, hold down the Ctrl button. To remove all groups from the selection, hold down the Ctrl key.

“Outlook”

The settings of the look depend on the field type.

E-mail field

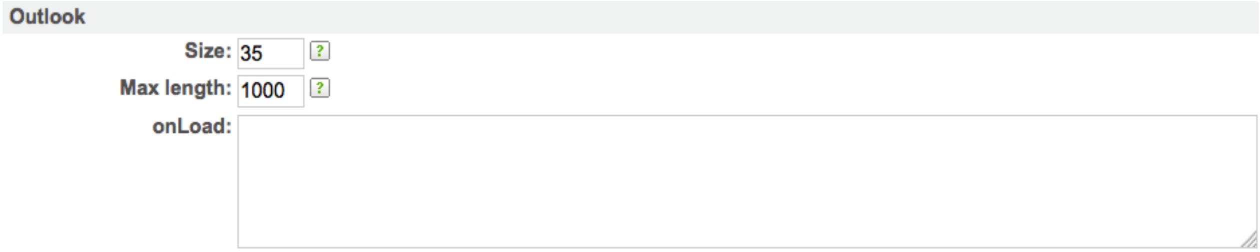
For what?

The e-mail field is meant for inserting an e-mail address. The address inserted in the e-mail field is displayed as a link and the link leads to the e-mail software installed on a computer. It may be necessary to use the e-mail field for complying with the general instructions of the Public Information Act.

Default values

A default value can be set to the field. For instance, it may be necessary that a respective e-mail address is displayed automatically upon adding a document/object.

“Outlook”

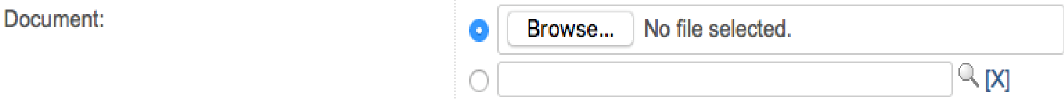


- Size – the size of the text box displayed to the user.
- Max. length – the maximum permitted number of characters.
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

File field

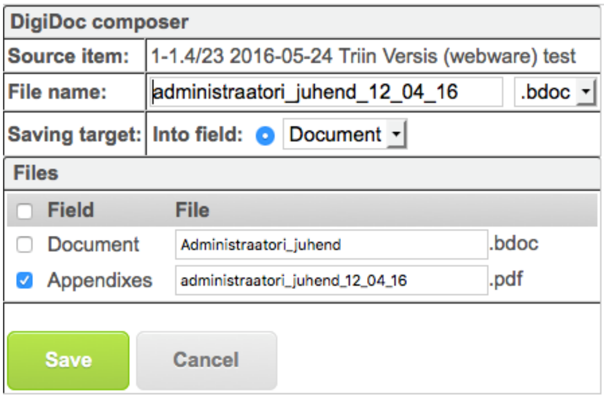
For what?

The file field is meant for keeping as file.



Place of saving: Field

You can determine the default field as the place of saving an envelope in the data field if you designate **Signed_file** as the export name. In such an event two saving places are no longer offered upon creating an envelope (in connections or the fields).

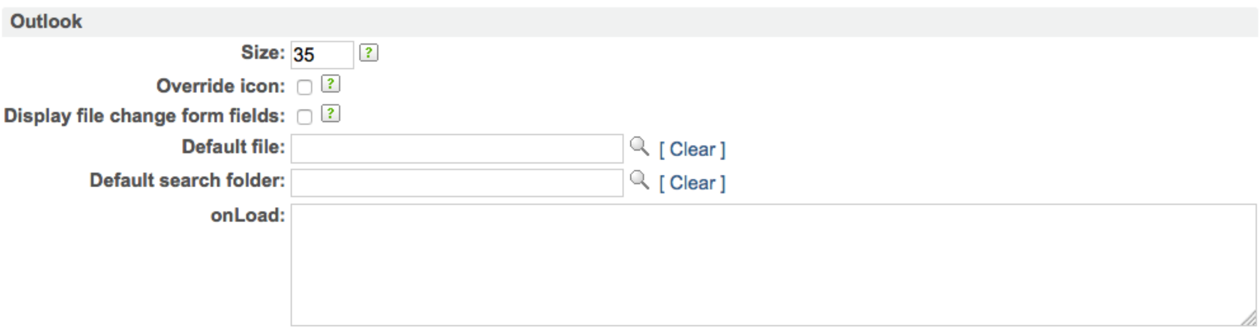


Default value

A default value can be set to the field. For instance, it may be necessary that a respective file is displayed automatically upon adding a document/object.

“Outlook”

- Size – the size of the file field.
- Set as icon – the file extension icon added to the field is displayed in the directory view (by clicking on the name of the series in the tree).
- Default file – upon adding a new object/document, the designated file is added to the field by default; to select the file, click on the magnifying glass.



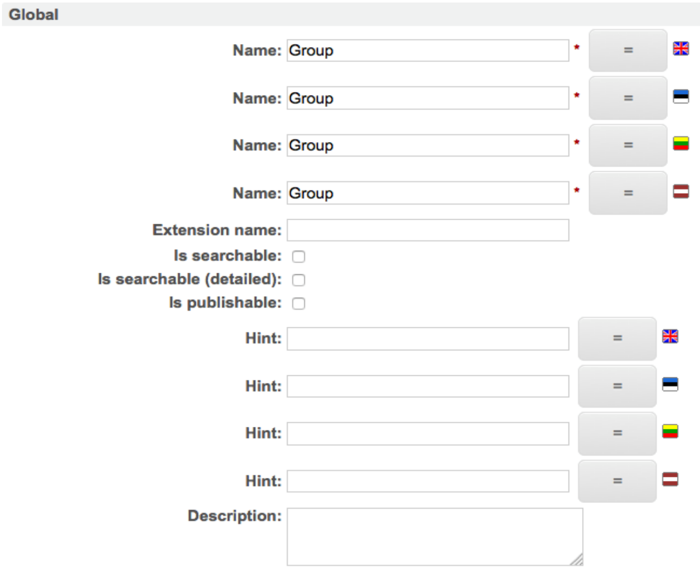
- Default search directory – a pre-defined location in the tree from where files can be searched.
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

Group

For what?

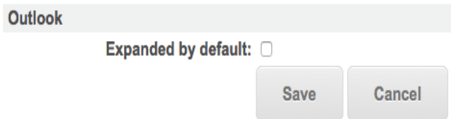
Creates a data separation strip in the register card.

“General”



- Name – the name of the field displayed on the register card.
- Name of extension – filled in if the field is related to some further development.
- Publishable – determines whether the field can be published.
- Tip – tips in the given languages for filling the field. Attributes a tip for the field, which will later be displayed in the document/object addition/change form behind the respective field as a question mark "?" and a tip will be displayed if you move the cursor on the question mark.
- Description – an informative field only for the desktop administrator (which field, etc.). Not indicated in the ordinary user views.

“Outlook”



- Open by default – data following the separation strip are not displayed.

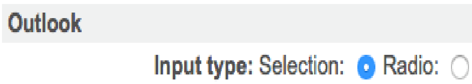
Field “Yes/No”

For what?

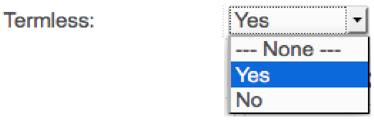
Choice field “Yes/No”

“Outlook”

Insertion type on the data map:

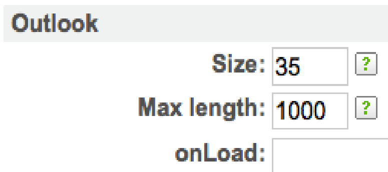


Choice:



Radio:

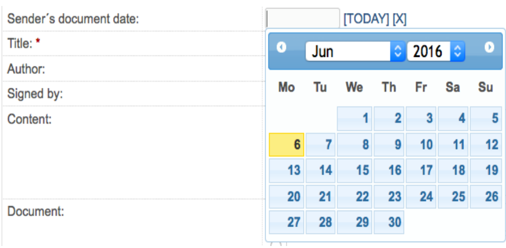
Homepage



For what?

The homepage field is meant for inserting the homepage address. The address inserted in the homepage field is displayed as a link.

Date field



For what?

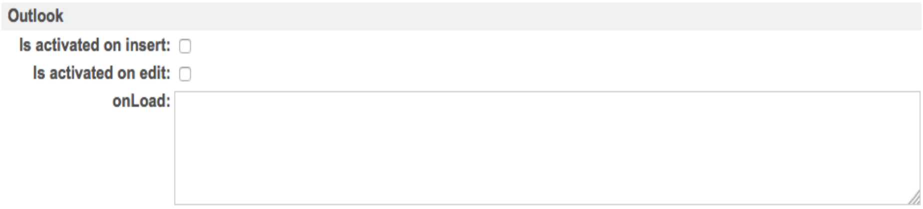
For inserting a date.

Default value

A default value can be set to the field. For instance, it may be necessary to automatically display the current date or a date 30 days later from the current date upon adding a document/object.

Default values	Result
+10 days	A date 10 days after the current date is attributed to the field.
-2 years	The field is filled with a date dating back two years.
0	The current date
Today	The current date
Tomorrow	Tomorrow’s date

“Outlook”



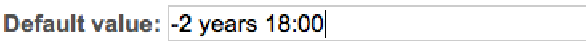
- Active upon addition – the field is active (can be filled in) in the entry addition form.
- Active upon changing – the field is active (can be filled in) in the entry change form.

Date and time

For what?

To add a date and time.

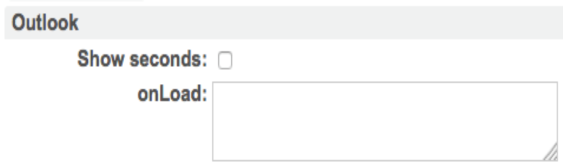
Default value



A default value can be set to the field. For instance it may be necessary to fill the field with a date two years ago and a certain time “**-2 years 18:00**” – it automatically fills the field with the date two years ago and a time of 6:00 p.m.

See also the default values of the date field.

“Outlook”



- Size – the size of the text box displayed to the user.
- Max. length – the maximum permitted number of characters.
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

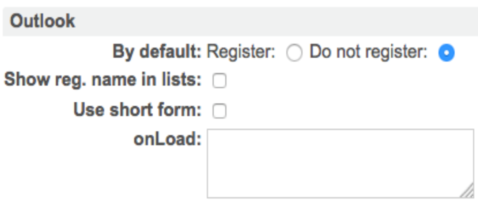
Counter index

For what?

In order to automatically give a document a registration number. For further information on the registration of documents, see the topic on counters.

Default value

A default value cannot be inserted in the field.



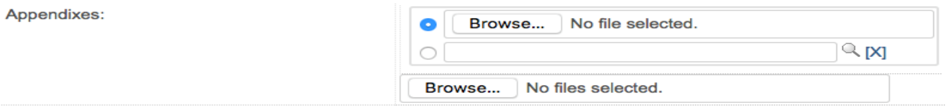
“Outlook”

- By default
  - Counter – the document/object receives a registration number immediately after saving.
  - Do not register – the document/object will not receive a registration number immediately after saving (used when the document needs to be approved before giving a registration number).
- Show reg. index in list - the document reference (i.e. the marking of the series along with the order number are displayed in the list view and on the register card).
- Use short name – only the order number and a prefix and/or suffix (if set) are displayed in the list view and on the register card – the marking of the series is not displayed.

Multiple files field

For what?

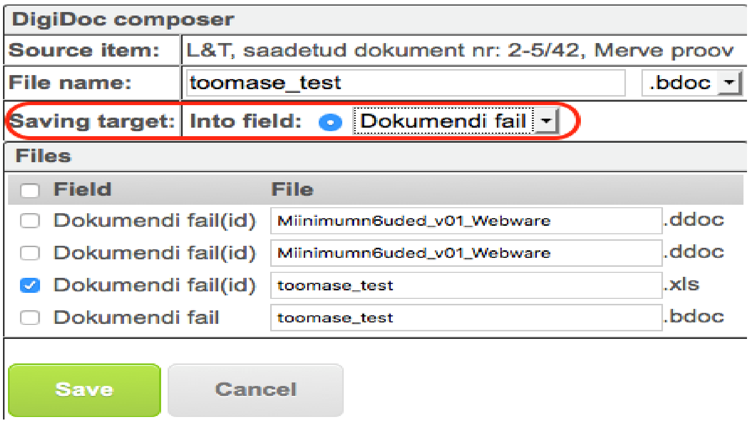
The multiple files field is meant for keeping multiple files.



How to set up?

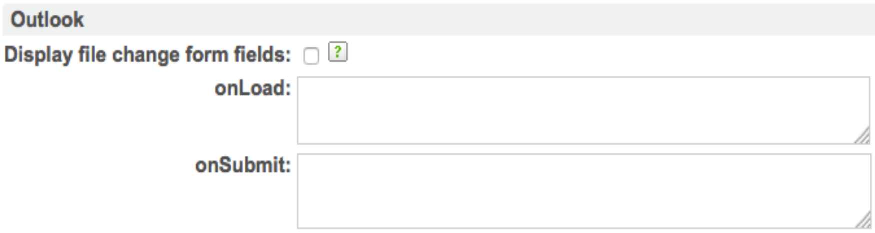
Place of saving: Field

You can determine the default field as the place of saving an envelope in the data field if you designate **Signed_file** as the export name. In such an event two saving places are no longer offered upon creating an envelope (in connections or the field).



"Outlook"

The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.



Selection of multiple users

For what?

The multiple users selection field is related to the static data type of the user, i.e. the choices of the multiple users selection field are taken from among the system users.

Default value

A default value can be set to the field. For instance, it may be necessary that group members are displayed automatically upon adding a document/object. For further information, see the block "Selectable users in groups".

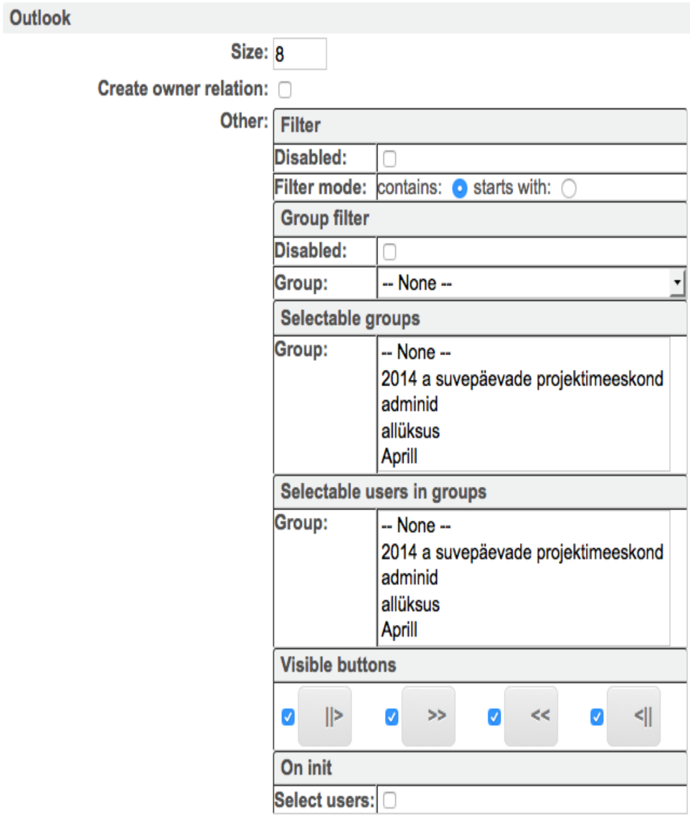
"Outlook"

Size – the size of the field.

> **Create owner connection.** It is advisable not to use it. The functionality has been preserved for the purposes of the compatibility of the system.

Other:

- Filter:
  - Disabled – users are not displayed in the selection window.
  - Filter mode – in the name field, a search is made from among all the information contained in the field (contains) or based on the start of the data contained in the field (starts).
- Group filter
  - Disabled – the group selection menu is not displayed in the field.
  - Group – only one determined group is set by default in the group selection menu.
- Selectable groups



- Group – in the user selection window, it is possible to, in addition to users, also select determined groups (in the user list, groups can be distinguished with an asterisk). To determine multiple groups, hold down the Ctrl button. The respective variable (Enables groups in MUSEL selection) must be switched on in the configuration file (the IT administrator takes care of it).

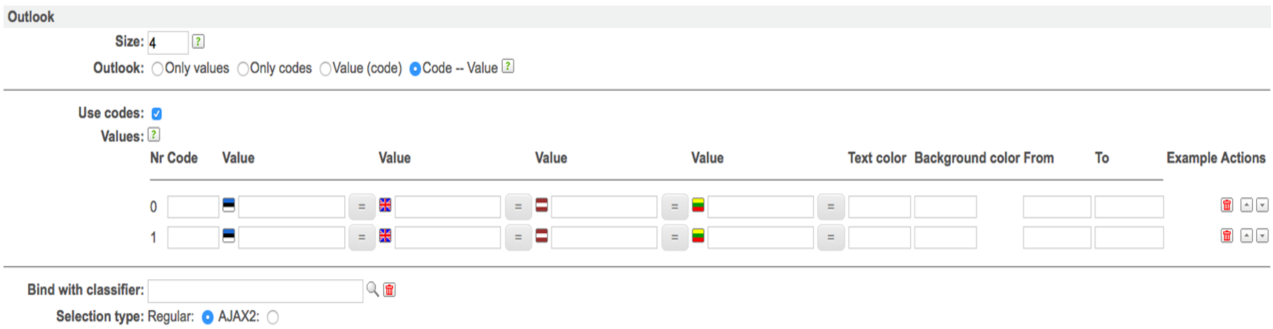
- Selectable users in groups – the determined groups are displayed in the group selection menu and only the members of the determined groups are displayed in the user selection. To determine multiple groups, hold down the Ctrl button. The respective variable (Enables groups in MUSEL selection) must be switched on in the configuration file (the IT administrator takes care of it). To change the settings of the default value, choose the desired group from which all the users will be transferred and tick the field “Select users”.
- Visible buttons – the selected buttons are displayed upon selection of members of the group.
- On init → Select users – group members determined by default have been chosen by default (right-hand window). If no group has been selected, all users of the system will be selected.

> The multiple users selection field does not currently have duplication support.

Selection of multiple values

For what?

A field with a selection menu where you can select multiple values.



“Outlook”

- Size – the size of the field.
- Look – you can determine the look of the selection field.

    - Only values – only values are displayed in the selection field.
    - Only codes – only codes are displayed in the selection field.
    - Value (code) – the value and after that (in brackets) the code are displayed in the selection field.
    - Code – Value – the code and after that the value are displayed in the selection field.
- Use codes – if ticked, the column “Code” will be displayed in front of the values.
- Values – values displayed in the selection field:

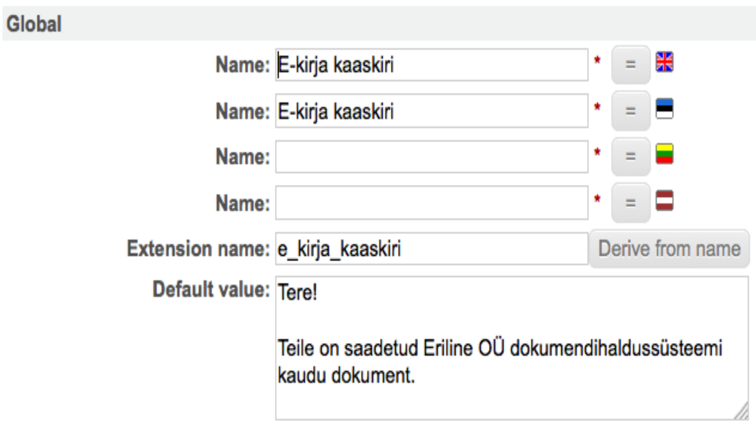
    - Code – numerical code;
    - Value – textual value;
    - Text colour – to determine the colour of the text, enter the colour code on the basis of the colour table (available on the Internet) in the form of **#FFFFFF**;
    - Background colour – to set the background, use the colour codes in the same way in the form of **#0033FF**;
    - From – the date field in order to indicate as of what time the value is displayed in the selection field (fill it in if you want to determine a period during which a value is offered for selection);
    - To – the date field in order to indicate the date up to which the value is displayed in the selection field;
    - Example – the stylised value is displayed.
    - Activities – using the buttons you can change the order of the values displayed in the selection.
- Tie to classifier – you can take the values displayed in the selection field right from the classifier.
- Selection type – the look of the selection field.
    - Ordinary – in the selection field, the values are displayed in a drop-down list.
    - AJAX2 - values are displayed in the selection field only if something has been entered in the field. For instance, in the case of using codes and values, it is possible to enter the start of the code, e.g. 111, after which values the start of the code will be displayed. Usually, it is used if there is a large number of values.
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

Text of multiple rows

For what?

For inserting a long text.

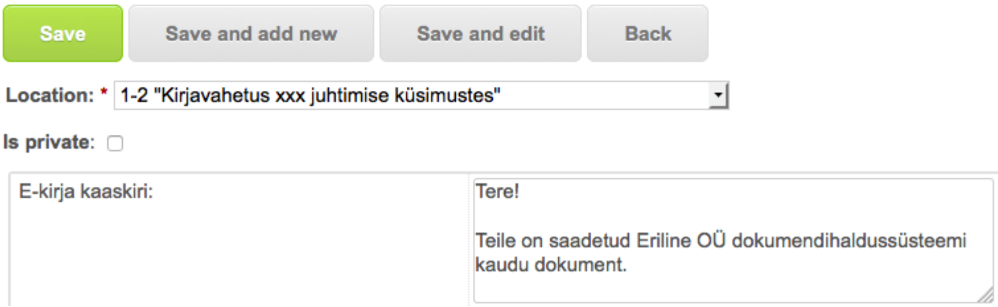
Adjustment and use of a default value



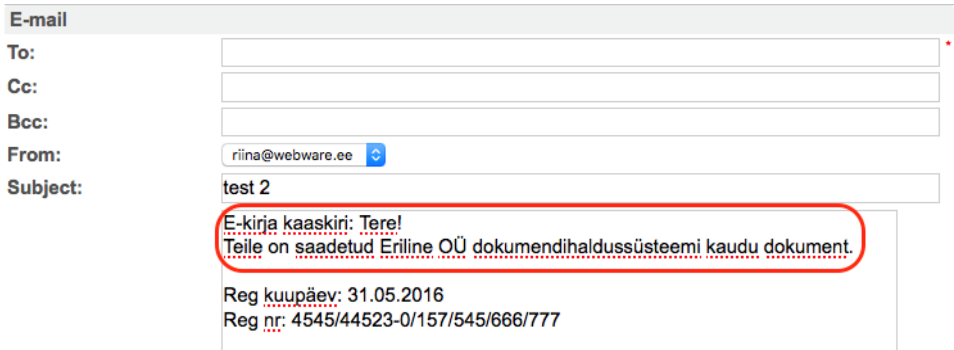
In the field of a multiple-row text, you can adjust, for instance, a data type-based e-mail cover letter, which can be used for sending e-mail messages directly from DHS. As of WD 5.1.1 (18.06.2015) it is possible to set up a multiple-row text field so that the default value changes the row.

Add a multiple-row text field / open the settings of a multiple-row text field and enter the cover letter of the e-mail in the “**Default value**”.

The cover letter of an e-mail message may be placed in the first position in the order of the fields. In such an event, the field is displayed first in the outgoing e-mail window.



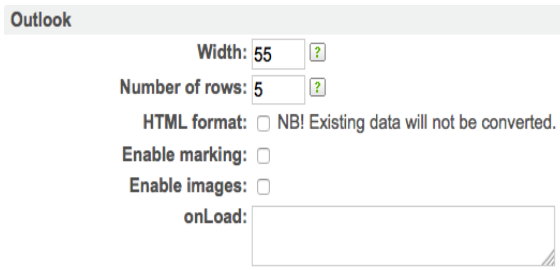
The e-mail cover letter field is generated in the document addition form, but it can be hidden entirely, so that it will not constitute excessive information upon registration of the document. It can be adjusted using the [“Read only” setting](#) or [field-based rights](#).



Upon drawing up an e-mail message, the text of the e-mail cover letter is shown in the content field.

“Outlook”

- Width - the width of the displayed field.
- Number of rows – the number of the rows of the field.
- HTML format – the text inserted in the field can be formatted. Please note: The HTML format can be used only if no print templates are used in the type.
- Marking.



- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

Tags

For what?

With the help of keywords, all users of the system can mark the desired entries with suitable words in order to make them easier to find. Keywords can be used in document type searches as well as in general object searches.

How to set up?

Add the field “Tags” to the data type.
Check if there are “Märksõnad” among the classifiers. If not, consult the user support of WebDesktop. The administrator can add keywords to the classifier and remove them from there. Usually, keywords are created on a day-to-day basis (for further information see the description below).

“Outlook”

None.

How to use?

Adding/changing a keyword

The keywords are saved in the system as the classifier “Keywords”, which means that they can be added and changed via the classifier management interface. A new keyword can be added directly from the document addition or changing form – the system searches for the keyword based on the inserted characters upon insertion and if no match is found, you can add a new keyword. To that end, a comma (“,”) needs to be put after the word. To delete the keyword from the data field, it must be removed by clicking on the cross or deleted from the keyboard using the backspace key.

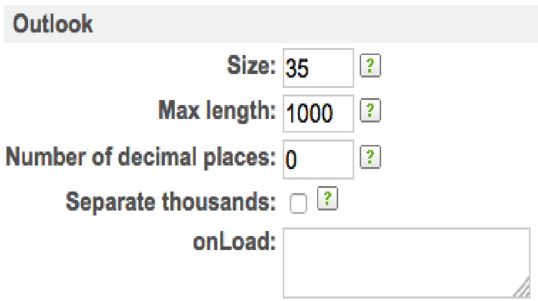
Searching in the top bar using a keyword

To search for a keyworded document, enter ! in the search field in the top bar and, for instance, the keyword “” after it.

Number

For what?

A field where you can insert only numbers. If you insert text in the number field, the WD will display an alert "Incorrect field content" upon saving the entry.



“Outlook”

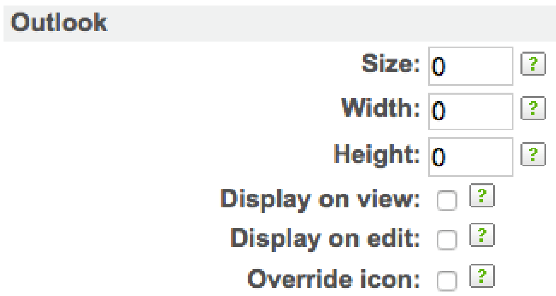
- **Size** – the size of the text box displayed to the user.
- **Max. length** – the maximum permitted number of characters.
- **Number of decimals** – the prescribed number of decimals; excessive decimals are rounded if more decimals that prescribed in the interface are entered in the field.
- **Separate thousands** – separating thousands by a space.
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

Picture

For what?

To display a picture file.

“Outlook”



- Size – the size of the field.
- Width – the width of the picture (to retain the original width of the picture, leave the field empty or enter 0).
- Height – the height of the picture (to retain the original width of the picture, leave the field empty or enter 0).
- Show upon viewing – the picture is shown upon opening the register card.
- Show upon changing – the picture is shown upon changing the register card.
- Set as icon – the file extension icon added to the field is displayed in the directory view (by clicking on the name of the series in the tree).

Cross-table field

For what?

The cross-table allows for creating data compositions based on multiple specifiers. The cross-table is used, for instance, in the case of business trips where different cost types must be recognised along with costs. In the cross-table, the calculation functionality is often used to make the work of the data insertion staff easier.

"Outlook"

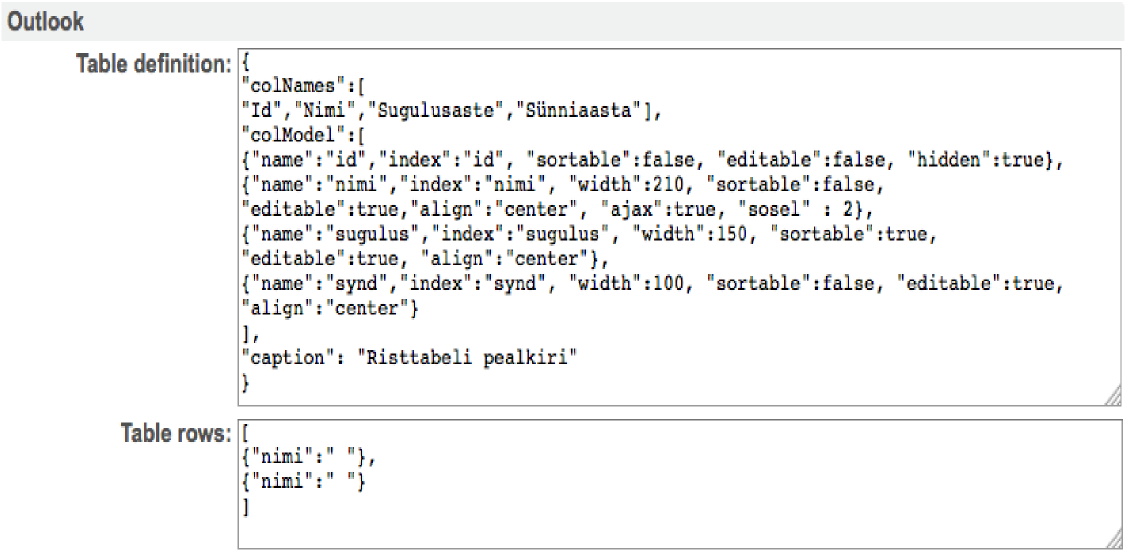


Table definition

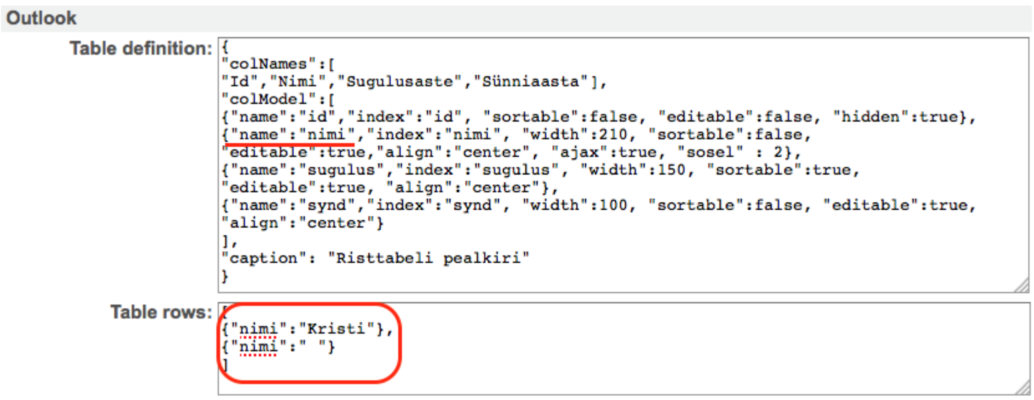
The field is prescribed for creating a cross-table. To that end, enter the definitions of the columns, their properties and formulas.

```
{
"colNames":[
"No","Date","Explanation"
],
"colModel":[
{"name":"id","index":"id", "width":30, "sortable":false, "editable":false, "hidden":false},
{"name":"date","index":"name", "width":150, "sortable":false, "editable":true},
{"name":"explanation","index":"explanation", "width":100, "sortable":false, "editable":true}

],
"caption": "Payment for work services"
}
```

Table rows

Definitions inserted in the field give an additional opportunity to pre-define the selected table rows upon addition of a new document. In the next sample, one row is added to the cross-table by default and therein the daily allowance is **32.00 euros**.



Sample 1 table definition:

```
{
"colNames":[
"Id","No of days","Allowance","Sum"
```

```
],
"colModel":[
{"name":"id","index":"id","width":150, "sortable":false, "editable":true, "hidden":true},
{"name":"days","index":"days", "width":175, "sortable":false, "editable":true},
{"name":"allowance","index":"allowance", "width":150, "sortable":false, "editable":true},
{"name":"sum","index":"sum", "width":150, "sortable":false, "editable":true}
],
"formulas" : {
"expr(days:1*allowance:1)" : "sum:1",
"sum(sum:first..sum:last)" : "crstbl_setExpFieldValue(\"sum_total_b\",result);"
},
"caption": zero
}
```

Sample 1 table rows:

```
[
{allowance":"32.00 €"}
]
```

Table rows definition sample if desire to add n-rows

The table rows must be separated by commas.

Sample 2 table rows

```
[
{allowance":"32.00 €"}
{allowance":"32.00 €"}
]
```

Empty table row

Put a space between the quotation marks in order to create an empty table row. **{„allowance“:““}**

Sample 3 table rows

```
[
{"allowance":" "}
]
```

Mandatoriness of a table row or column

To make a table row mandatory, add the parameter “**required”:true**.

Separation of the decimals of a number field with a comma instead of a full stop and determining the number of decimal places

```
{"name":"currency","index":"currency", "width":75, "sortable":false,
"editable":true, "formatter": "number", "formatoptions":{"decimalSeparator":",", "decimalPlaces": 2}},
```

More about filling in the “Table definition” field

First, determine the names of columns (attribute **colNames**). “Id” must always be the first column and the rest must be between quotation marks and separated by a comma.

Upon adjusting the settings of the columns (attribute **colModel**), there are multiple options, e.g. hiding the column, which is usually made in the case of the Id column, tying to a classifier (the second column Cost type in the “name” column given in the example).

Possible attributes of the cross-table

- name – the name derived by the administrator (mandatory) – must not contain any non-English letters or spaces.
- sortable – sortable – can be sorted (options: **„sortable“:true**;
- editable – can be edited (choices: true, false);
- width – the width of the field.
- hidden – concealed (choices: true, false);
- align – alignment (possible choices: left, center, right);
- classifier – classifier (the name of the classifier determined in WD).
    - **ajax** – the classifier is indicated as an ajax-choice (choices: true, false) e.g. **„ajax“:true**;
    - **combo** – the classifier is displayed as a drop-down list (choices: true, false) e.g. **„combo“:true**;

- sosel – SOSEL field or the field of selection of one object.
- required – the column must be filled in.
- formulas – formulas;
- caption – title of the table.
- formatter: **number** – number formatting is used.
- formatoptions: **{„decimalSeparator“:“,“, „decimalPlaces“: 2}** – a decimal separator is used and there are two decimals (used together formatter:**number**

Cross-table column field types

Date field

To adjust the date field, **date** must be used in the name of the extension.
Example: **„name“:„x_date“,“index“:„x_date“**
In the case of multiple date fields, the name of the extension of the first row may be, for instance, “x_date” and the name of the extension of the second row may be, for instance, “y_date”.

SOSEL field or the field of selection of one object

To adjust the settings of the field of selection of one object, the parameter **"sosel": 59277** must be added, where 59277 refers to the data type id.

Field of selection of one value

To adjust the settings of the field of selection of one value, the parameter **"classifier": “Cost type”** must be added, where “Cost type” refers to the name of the classifier.

Field of selection of one user

To adjust the settings of the field of selection of one user, the parameter **"sosel": 2**.

Simpler calculation formula

It is possible to define formulas. See also the “formulas” attribute in sample A.

Adding, subtracting, multiplying, dividing

In the following example, the Price and Rate in the first row are multiplied and the sum is entered in the “Sum (EEK)” field at the end of the respective row of the cross-table.
„expr(price:1*rate:1)“ : „sum_eek:1“, (in this field, the calculation operation is defined)
expr – refers to a calculation operation after which the operation is defined in brackets.
(price:1*rate:1) – price and rate denote column names and the first row of table no. **1**.
After the colon, the result is displayed in the formula (i.e. to which table column the calculation result is transferred).

Sum of all rows

The sums of the rows of the cross-table are added and summarised in a separate field (export name “costs_total”).
“sum(sum_eur:first..sum_eur:last)” : “crstbl_setExpFieldValue(\“costs_total\”,result);”
sum(sum_eur:first..sum_eur:last) – the “sum_eur” columns of the entire table (from first to last) are added.
After the colon it is determined where the result is displayed (using definition of JavaScript events).
To calculate the number of rows, a number field must be added to the form. The number field must have the same export name as **“crstbl_setExpFieldValue(\“\“,result);”**

Decimals in calculation operations and end result

„decimalPlaces“ : { (for defining decimals)
“expr” : “2”, - decimals in calculation operations
“sum” : “2”, - decimals in the end result

Sample A

> Please note: The **index** attribute must certainly be added to the definitions of the columns of the cross-table (colModel).

```
{
"colNames":[
"Id","Cost type","Price","No VAT","VAT","Currency","Rate","Sum (EEK)"
],
"colModel":[
{"name":"id","index":"id", "sortable":false, "editable":false, "hidden":true},
{"name":"name","index":"name", "width":150, "sortable":false, "editable":true},
{"name":"price","index":"price", "width":100, "sortable":false, "editable":true},
{"name":"no_vat","index":"no_vat", "width":100, "sortable":false, "editable":true},
{"name":"vat", "width":75, "sortable":false, "editable":true, "align":"right", "sorttype":"float"},
{"name":"currency","index":"currency", "width":75, "sortable":false, "editable":true},
{"name":"rate","index":"rate", "width":75, "sortable":false, "editable":true, "align":"right", "sorttype":"float"},
{"name":"sum_eur","index":"sum_eur", "width":100, "sortable":false, "editable":true, "align":"right", "sorttype":"float"}
],
"formulas" : {
"expr(price:1*rate:1)" : "sum_eur:1",
"sum(sum_eur:first..sum_eur:last)" : "crstbl_setExpFieldValue(\"costs_total\",result);"
},
"decimalPlaces" : {
"expr" : "2",
"sum" : "2"
},
"caption": "Payment for work services"
}
```

More complex calculation formulas

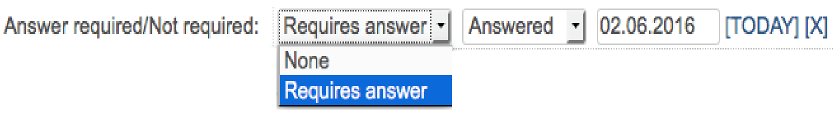
Adding and multiplying in one operation

„expr(amount:1* (price:1+add:1))“ : „sum:1“
amount:1* must be followed by a space
(price:1+add:1))must use double brackets

Sample B

```
{
"colNames":[
"Id","Room","m2","EUR/m2","Collateral costs","Sum","Notes"
],
"colModel":[
{"name":"id","index":"id", "sortable":false, "editable":false, "hidden":true},
{"name":"objekt","index":"object", "width":300, "sortable":false, "editable":true, "sosel" : 59277},
{"name":"amount","index":"amount", "width":175, "sortable":false, "editable":true},
{"name":"price","index":"price", "width":175, "sortable":false, "editable":true},
{"name":"add","index":"add", "width":175, "sortable":false, "editable":true},
{"name":"sum","index":"sum", "width":175, "sortable":false, "editable":false},
{"name":"notes","index":"notes", "width":175, "sortable":false, "editable":true}
],
"formulas" : {
"expr(amount:1* (price:1+add:1))" : "sum:1",
"sum(sum:first..sum:last)" : "crstbl_setExpFieldValue(\"total cost\",result);"
},
"decimalPlaces" : {
"expr" : "2",
"sum" : "2"
},
"caption": zero
}
```

Systemic field

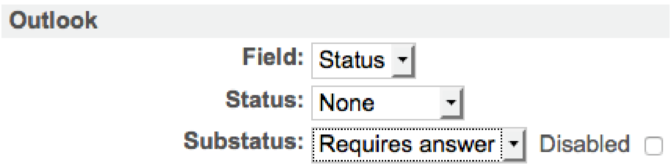


For what?

Used in the registration cards of, for instance, an initiating letter and a reply letter. An initiating letter received by an agency may need a reply and in such an event s systemic field is used, indicating “Needs a reply” in the status of the initiating letter. If a reply letter is registered as a follow-up to the initiating letter, the status will be indicated as “Replied”. Automatically, the status of the initiating letter changes to “Replied” and the date of reply is added.

“Outlook”

- Field – selection of systemic fields (currently the only option used is “Status”).
- Status – the status indicates whether the letter has been resolved or not. Choices: None, Replied, Done.
- Substatus – indicates whether the letter calls for a reply or not. Choices: None, Needs a reply.
- Not activated – if switched on, it is not displayed to the users of the sub-status field.



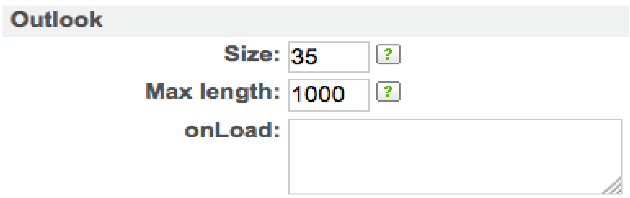
Text

For what?

For insertion of a shorter text.

“Outook”

- Size – the size of the text box displayed to the user.
- Max. length – the maximum permitted number of characters.
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.



Insert

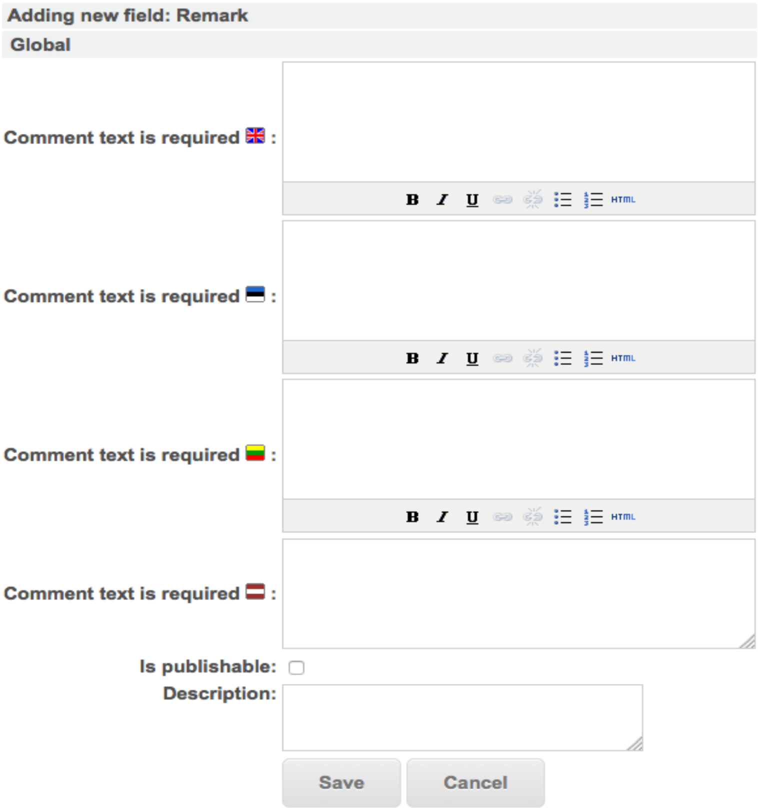
For what?

The insert field allows for inserting additional information that may need to be displayed to, for instance, the person who registers / creates a document. Different practices are used, e.g. the insert can be added before the field on which additional information is to be given to the person who fills in the document form, so that they would take it into account upon filling in the form. The next sample is of an insert field that has been added as the last field immediately before the routing block.

How to set up?

The overall settings window of the interim text field differs from the settings of other data fields.

- **Notes text is required** – depending on the language of the system, the insert can be inserted in the respective languages (in addition, Finnish can be used). The layout of the text can be made in, for example, OpenOffice Writer first and thereafter be pasted to the notes fields. In addition, the text can be formatted using WD tools.
- **Name of extension** – filled in upon using special developments.
- **Publishable** – the field is published in the user interface if [“Do not show in public interface”](#) has not been marked as the restriction of the entry.
- **Description** – as additional information to the administrators as to why the field has been created.



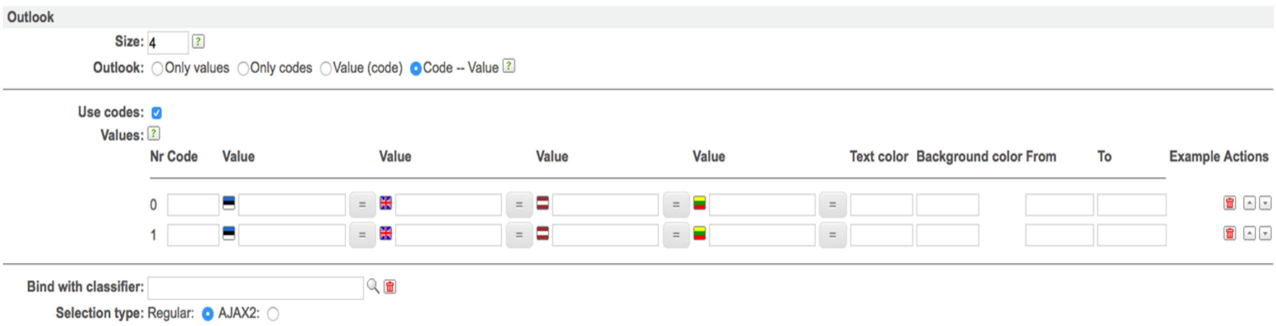
Selection field

For what?

Allows for creating a field with selectable values.

“Outlook”

- **Size** – the size of the field.



- **Outlook** – you can determine the look of the selection field.
  - Only values – only values are displayed in the selection field.
  - Only codes – only codes are displayed in the selection field.
  - Value (code) – the value and after that (in brackets) the code are displayed in the selection field.
  - Code – Value – the code and after that the value are displayed in the selection field.
- **Use codes** – if ticked, the column “Code” will be displayed in front of the values.
- **Values** – values displayed in the selection field:
  - Code – numerical code;
  - Value – textual value;
  - Text colour – to determine the colour of the text, enter the colour code on the basis of the colour table (available on the Internet) in the form of **#FFFFFF**;
  - Background colour – to set the background, use the colour codes in the same way in the

form of **#0033FF**;
   - From – the date field in order to indicate as of what time the value is displayed in the selection field (fill it in if you want to determine a period during which a value is offered for selection);
   - To – the date field in order to indicate the date up to which the value is displayed in the selection field;
   - Example – the stylised value is displayed.
   - Activities – using the buttons you can change the order of the values displayed in the selection.

> Please note: The colours, codes and dates are not mandatory.

Bind with classifier – you can take the values displayed in the selection field right from the classifier.

- **Selection type** – the look of the selection field.
   - Regular – in the selection field, the values are displayed in a drop-down list.
   - AJAX2 - values are displayed in the selection field only if something has been entered in the field. For instance, in the case of using codes and values, it is possible to enter the start of the code, e.g. 111, after which values the start of the code will be displayed. Usually, it is used if there is a large number of values.

> If 1) the **section type** is … and 2) the **look** is …, both are not supported as default values: Code and value, but only code, i.e. if the code and value are or only the value is inserted as the default value, WD will give the following error: "*Unexpected exception:*

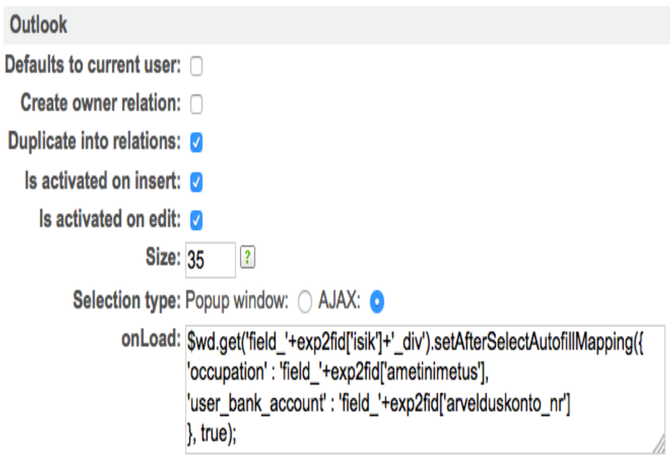
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

Field of selection of one user

For what?

The single user selection field is related to the static data type of the user, i.e. the choices of the user selection field are taken from among the system users.

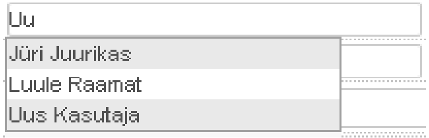
"Outlook"



- Selected active user – the user account of the person who has opened some data type addition form is automatically selected for the field.
- **Create owner connection.** It is advisable not to use it. The functionality has been preserved for the purposes of the compatibility of the system.
- Duplicate to connections – the user account that has been selected is also automatically duplicated into the connections block.
- Active upon addition – if the field is ticked, you can see a user account for the field if you are on the data type addition form.
- Active upon changing – you can choose a user account for the field if you are on the data type change form.
- Size – the size of the field.

- Selection type – the look of the field.

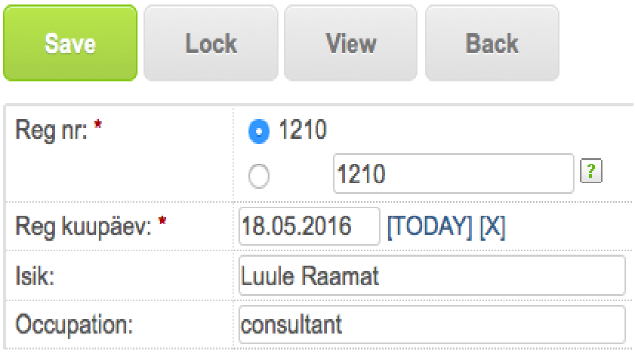
Popup window – the field is opened in a popup window 



AJAX – the field is opened with an AJAX solution.

- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

Transfer of data from a user card to a text field



Data on a user card can be automatically transferred to the text field, e.g. transferring the user's job title to the text field. If the user chooses the user, the job title field in the addition form is automatically filled with the user card information.

Before adjusting the settings make certain that you have a field of the single user selection type in the data card and that the field for the insertion of the job title is of text type. The fields must have export names.

To adjust the settings, open the settings of the field of a single user type and put the following JavaScript in the **onLoad** field (see Sample A),

where define based on what data is to be enquired from the user card *$wd.get('field_'+exp2fid['***esitaja***']+'_div');*

and the field's export name whose result is output *.setAfterSelectAutofillMapping({'occupation' : 'field_'+exp2fid['***jobtitle***']*

Sample A

```
$wd.get('field_'+exp2fid['esitaja']+'_div').setAfterSelectAutofillMapping({
'occupation' : 'field_'+exp2fid['jobtitle']
}, true);
```

Sample B

```
$wd.get('field_'+exp2fid['nimi']+'_div').setAfterSelectAutofillMapping
({ 'structure_unit' : 'field_'+exp2fid['structuralunit'],
'occupation' : 'field_'+exp2fid['occupation']
}, true);
```

The currently supported fields are: „id“, „name“, „is_away“, „is_passive“, „occupation“, „email“, „occupation“, „phone1“, „phone2“, „gsm“, „estidcode“, „division“, „division_id“, „sms_email“, „fax“, „is_desktop_admin“, „is_admin“.

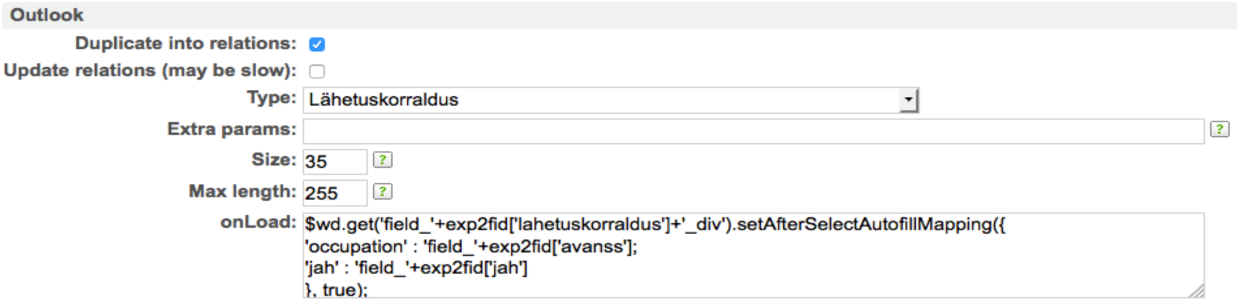
Single object selection

(SOSEL = Single Object Selection)

For what?

Object (e.g. topical letter or contact person) selection field.

“Outlook”



- Duplicate into connections – the chosen object is automatically duplicated in the respective connection block if a connection has been created between the data type and the data type of the selected object.
- Renew connections (may be a slow activity) – retroactively, all the existing connections are updated according to the change of the object in the field “Type” or if a new field is created in the register card.
- Type – the choice of the data type of the object.
- Additional parameter – giving additional parameters to the object link.
- Size – the size of the text box displayed to the user.
- Max. length – the maximum permitted number of characters.
- The fields onLoad, onSubmit, onChange, onFocus, onBlur, onKeyUp and HTML attributes – defining JavaScript events for special developments.

Importing and exporting data types

Importing data types

For what?

With the data type importer you can import finished data types from one system to another or from one desktop to another.

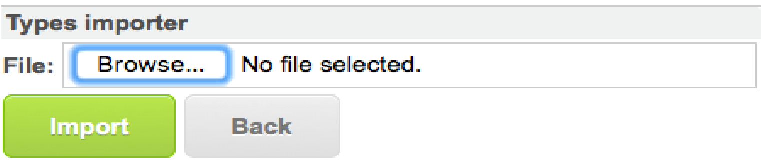
1. Creation of data type export file

In the menu, mark the name(s) of the respective type in "Management" → "Desktop admin" →"Types" and click on "Export selected".

In the opened additional window you can enter an additional description, but it is not mandatory. Save the file (.exp) in the computer.

2. Importing data type

1. In the menu, open "Management" → "Desktop admin" →"Types".
2. In the "Actions" menu above on the right, choose "Type importer".
3. Upload the previously saved export file (.exp) from the computer and click on "Import".



Data (document meta data) export

For what?

The data of inserted documents/objects can be exported into the desired format, e.g. Excel.

How to set up?

In order to be able to export data in the fields in Excel, the field must be adjusted with the export name, i.e. the "Export name" field must be filled in the settings.

For further information on the use of the export functionality, see the Ordinary User Manual.

Print templates

For what?

Print templates allow for creating a document on a pre-formatted template.

How to set up?

The desktop administrator, the standard administrator and, within the unit, the unit administrator have the right to manage print templates. An overview of inserted print templates in given in the print templates management module where you can change templates and their settings and add new templates.

We do not advise creating and editing print templates using **LibreOffice** or **MS Word** word processing programs, because the end result may be unpredictable.

To use a print template, you need to complete the following setup stages.

Using the word processing program (**preferably, OpenOffice Writer** or, in certain events, MS Word), create a document file. **Upon creating print templates, the Webware Open Office generator is used and therefore the document file must be saved in the odt format.**

In the case of WebDesktop templates, Smarty language is used as the syntax. For the Smarty language, the special characters are brackets { } (without quotation marks). For further information on the Smarty language, see here. Let us assume that we wish to automatically create an outgoing document that has information on the title of a registered document, the registration number and the registration date.

To that end it should be checked whether there are export names in the respective fields of the outgoing document data type. Open the settings of the data type.

Next, open the settings. You should see an adjustment window with the export name field.

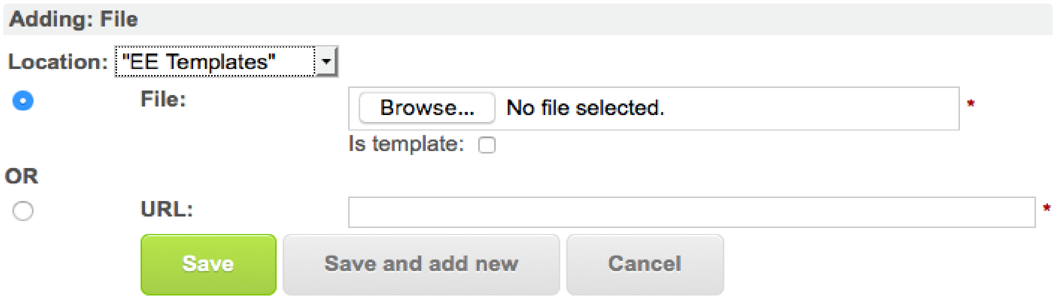
In the export name used in print templates no numbers can be used. For instance, “myfield2" cannot be found, while "myfield_b" can.

In order to use pictures on a print template, use a picture file in the .jpg format. The use of .png-files is not supported.

Insert the document file in the form of the export name of the field {gv p=exportname}. For instance, in the case of a title field the export name can be “title”. Then the result would be {gv p=title}.

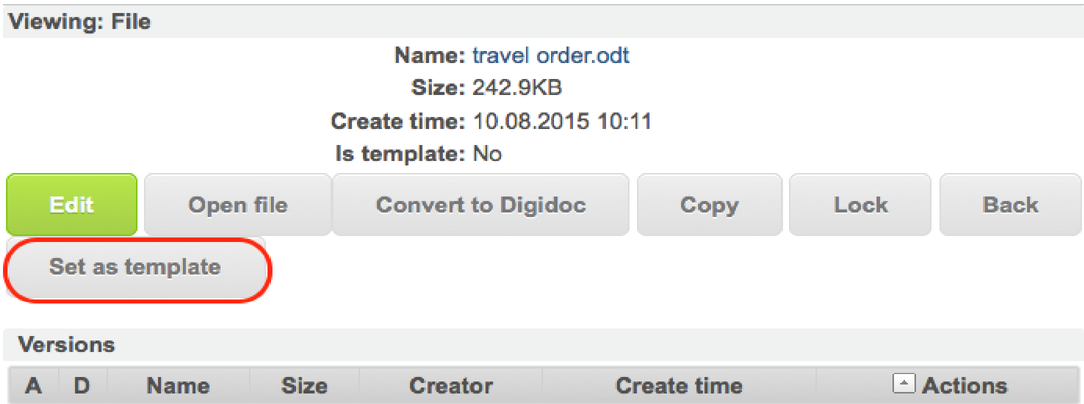
Load the print template file to WD in the odt format. Choose “Add new” → “File”.
The file addition window will be opened and, if possible, choose the **location** where the file will be saved. If a location is missing, you can adjust it in the directory settings form by binding the directory to the data type “File”.

To upload the file, click on the button “**Choose File” / “Load File**”.



If you wish to use the same file as the underlying document on next occasions (e.g. as the underlying file for creating next print template files), tick "**Is template**".

On the subsequent occasions, you will be able to use the marked files as the underlying document. You can remove the underlying document status from the file viewing form using the button "**Mark as non-underlying document**".



In order to add a file from a URL address, choose the URL field and add the URL address.
In order to add a file, click on "**Save**" or, in order to add a new file, click on "**Save and add new**".

Samples of print templates

Content of print template	Print template file (in odt-format)
Simple template, e.g. {gv p=reg_date},{gv p=reg_no}; use of a picture file; **free-format text** e.g. "Kind regards,"	
The template of an outgoing initiating letter related to the contact register solution. **If the value of the selection field "Data medium" (exp. name = datamedium) equals "digital"**, it will be marked (the date in the digital signature), otherwise it will be the registration date.	
The **template** of an outgoing reply letter related to the contact register solution with **the "You/We" part** (always put on the template)	
The user does not have to make a choice from among initiation and reply letters, but choose one letter print template. **If the user is the same as the undersigned, only the telephone number of the author or the undersigned is put in the author part (without repeating the name).** If the author is not the same as the undersigned, the author's given name and surname are placed in the author part along with the author's telephone number. The author and the undersigned must be located in the single user selection field to that end.	
Enquiring data from a related data type	

Transfer of the data of the cross-table to the template	
Ticking in values on a document on the basis of a selection of multiple values	

Unit info to the template

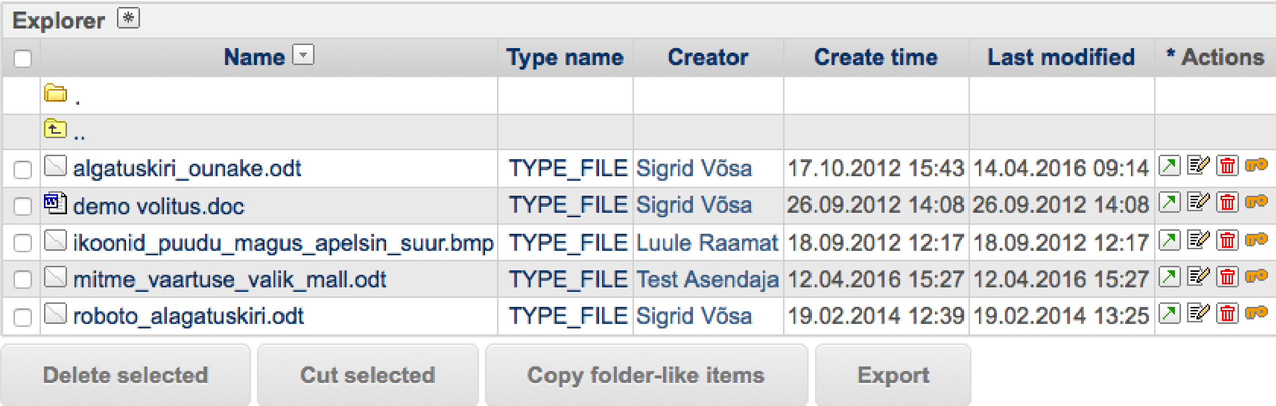
In order to add structural unit information to the document, put the following syntax in the template:**{gv p=item_unit_name}**

Date and time to the template in the Estonian format

Displaying the date and time in the Estonian format, e.g. **28. aprill 2015**. Add **t=est_named_date**, e.g. {gv p=reg_kpkell } to the export name.

Changing the print template file

Open the print template catalogue from the left side of the tree.

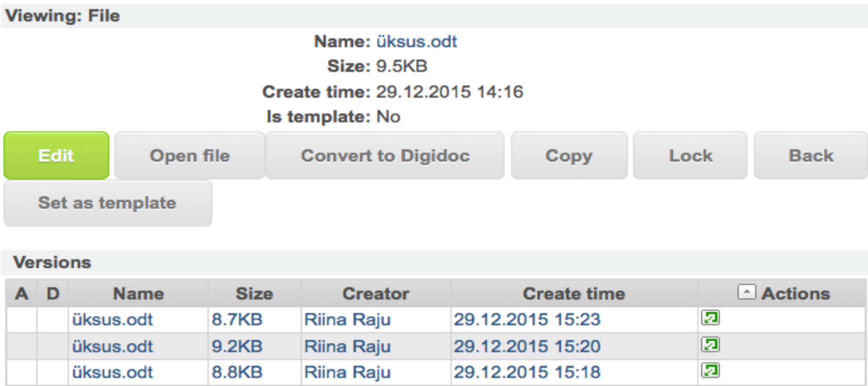


Explorer

	Name	Type name	Creator	Create time	Last modified	* Actions
	.					
	..					
	algatuskiri_ounake.odt	TYPE_FILE	Sigrid Võsa	17.10.2012 15:43	14.04.2016 09:14	
	demo volitus.doc	TYPE_FILE	Sigrid Võsa	26.09.2012 14:08	26.09.2012 14:08	
	ikoonid_puudu_magus_apelsin_suur.bmp	TYPE_FILE	Luule Raamat	18.09.2012 12:17	18.09.2012 12:17	
	mitme_vaartuse_valik_mall.odt	TYPE_FILE	Test Asendaja	12.04.2016 15:27	12.04.2016 15:27	
	roboto_alagatuskiri.odt	TYPE_FILE	Sigrid Võsa	19.02.2014 12:39	19.02.2014 13:25	

On the row of the respective template click on the icon "View"

The file viewing form will be opened.



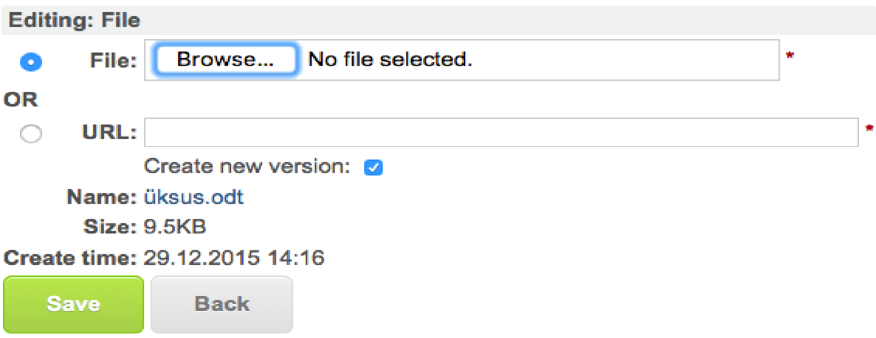
In the template file, changes can be made in two ways:

Open file button initiates the direct changing (editing) of the file. The document is opened and the changes are saved directly in the system without loading the document into the user's computer.

Edit button allows for opening the changed file from the computer.

Browse... – you can choose the file from the computer.

Make a new version – creates a list of old versions, which can be restored later.



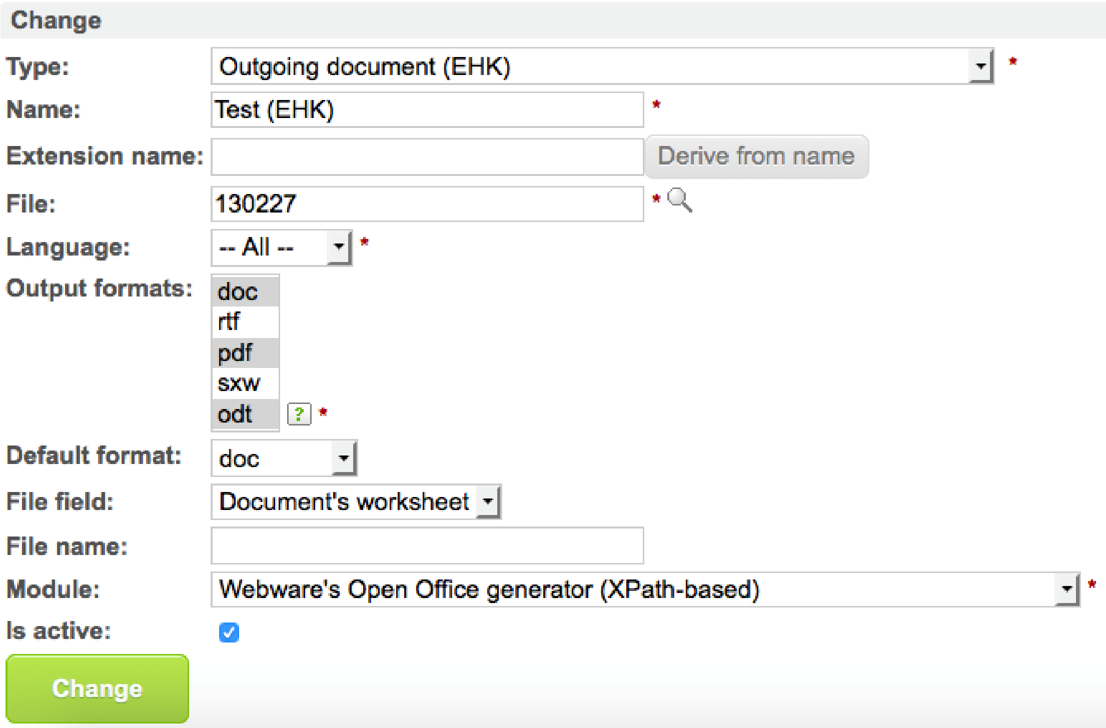
Changing print template settings

For what?

If file formats (e.g. docx, pdf, etc.) in which a document file is created need to be added or if the name of the printing ground needs to be changed, you can do it via the "Printing grounds" module.

How to set up?

Choose “Management” → “Printing grounds” from the top menu.
At the end of the respective print template row (in the “Actions” column), click on the "Change" button.



Make the required changes and click on "Change" to save the changes.

Deletion of a print template

Print templates can be deleted in two ways:

1. Choose “Management” → “Printing grounds” from the top menu. At the end of the respective print template row (in the “Actions” column), click on the "Delete" button.
2. Choose “Management” → “Desktop admin” → “Types”. On the card of the respective (sub)type in the “Printing grounds” block, click on “Delete” button.

Finally, you have to delete the file also from the “Printing grounds” directory in the tree on the left. To delete it, tick the respective template and click on “Delete selected”.

Instructions on making print templates based on the Webware Open Office generator (X-path)

General

The Smarty language is used in WebDesktop in print templates.
If the characters of the Smarty language { } are to be used inside the text, they must first be replaced with “{” ⇒ “{{” “}” ⇒ “}}”, respectively. In addition, characters ''' (three single quotation marks) must be used instead of quotation marks (without quotation marks). To obtain the individual quotation mark, the characters '' (two individual quotation marks) must be used (without quotation marks).

Example:

Input

```
This here is a row of numbers {ldelim}1,2,3{rdelim}
```

Output

```
This here is a row of numbers {1,2,3}
```

For further information on the standard Smarty syntax, see here: http://smarty.net.

Path

Path is the path to an element in the XML tree. In addition to the traditional X-Path syntax, sub-paths can be used by separating them using characters "«" and "»". For instance, "«objekt_id»". In sub-paths, special functions can be used in addition to the regular path:

- glv:reference to sequence:name of the field
- type_ename:type extension name

Samples:

In the given sample, the person going on a business trip (lhv) is given a value via an id (lahetatav_id) read from the business trip (lh).
// Parameter "o" is a freely chosen name and must overlap with the name given in the sub-path.
// The only rule is that the parameter must not overlap with any built-in parameter.

```
{sle n=lhv
p='''webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_id=''<<glv:
o:lahetatav_id>>'']'''
o=$lh}
```

// In the given example, all related business trips are found using the name of the extension for identifying the type.
// It is a more universal approach and allows for transferring templates more easily from one system to another.

```
{sle n=lhs
p='''webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_type_id=''<
<type_ename:Lahetus>
>'']'''}
```

Tags

opt

This tag is meant for optimising. The program needs "hints" as to what types and fields (that fall within the if sentence) are to be used in the template. This will greatly reduce the size of input XML. By default, the system uses the ID type on which printing is commenced; i.e. if you want data only directly from the same data card, you do not need to use the opt tag. However, if you want to also take data from connections, you need to define the IDs of the respective connected types.

Parameters

Name	Description
tids	List of type IDs separated by commas
enames	List of type export names separated by commas
max_depth	The maximum depth in XML. By default, it is 2. If you want to go deeper into the connections, the maximum depth should be 3, etc.

Example:

```
{opt tids=27992,28007,34111}
```

sb

This tag is meant for determining the base path. The latter is needed, above all, for shortening the descriptions of the paths of the location. If no sb tag can be found in the document, "/webdk_data/webdk_item" is automatically designated as such.

Parameters

Name	Description
p	path. Determines the location in the XML tree.

Example:

```
{sb p='''webdk_item[item_id=''45676'']'''}
```

Determines that the following journeys are as of item id=4676.

gv (get value)

This tag is used for displaying the content of fields.

Parameters

Name	Description
p	path. Determines the location in the XML tree.
c	context. Determines the context as of which the value search is conducted. See the sample.
t	type. Determines the field type. If not specified, it is displayed exactly as in the input. See the part on types.
req	Is required. Determines whether the respective variable is required. By default, the setting is "true".
empty	If the value is missing or empty (in the latter event, the setting must be req=false), the value of the variable is returned. E.g. {gv p=myvalue req=false empty=tühi}.

Types

Name	Description
date	Date and/or time. Determines the date type based on which the input dates can be presented in different forms. The shape can be determined by the parameter fmt.
est_named _date	The date in Estonian. E.g. "30. oktoober 2008". See the sample.
musel	Determines that it is a musel value that is formatted in accordance with the parameters "musel_sep", "musel_val". E.g. {gv p=MVV t=musel musel_sep=, empty=tühi musel_val=« code »: «value» req=false}

Example:

```
Type: {gv p=../webdk_item_type/item_type_name_translation/et}
Title: {gv p=pealkiri}
Date in format YYYY-MM-DD: {gv p=reg_date t=date fmt=''Y-m-d''}
Date in the said format: {gv p=reg_date t=est_named_date}
{sle n=a p=webdk_relations/webdk_relation/webdk_slave_item/webdk_item}
Title of the first connection: {gv p=pealkiri c=$a.0}
```

sle (set get value)

This tag is used for drawing up so-called internal discussions so that they can be displayed later using the Smarty foreach construction.

Name	Description
n	name. Determines with which name the list is saved.
p	path. Determines the location in the XML tree.
c	used, above all, in foreach, etc. cycles upon displaying sub-elements

Example:

```
{sle n=a p=webdk_relations/webdk_relation/webdk_slave_item/webdk_item}
```

sl (sort list)

This tag is used for sorting the so-called internal discussions (made with “sle”).

Name	Description
n	name. A name made using the “sle” function.
p	path. Determines the location in the XML tree.

Example:

```
{sle n=a p=webdk_relations/webdk_relation/webdk_slave_item/webdk_item}
{sl n=a p=pealkiri}
```

table

This tag is used for creating tables.

Name	Description
p	path. Determines the location of the values of the table.
c	context. Determines the starting point as of which the path is resolved. This is necessary, for instance, upon generation of tables in the “context” inside a cycle (see the sample).
sort	sorting path. Determines the journey to the value that serves as the basis for sorting. The path must be relative to the table row.

tgv (table get value)

This tag is used for displaying the values within the table.

Parameters

The parameters are the same as that of the gv function, but the difference is that the context is a specific table row.

Types

Name	Description
date	Date and/or time. Determines the date type based on which the input dates can be presented in different forms. The shape can be determined by the parameter fmt.

Example:

```
{table p=webdk_routing}
^Roll^Kes^Ülesanne^
|{tgv n=rt_role_name}|{tgv n=rt_perf_name}|{tgv n=rt_task}|
{/table}
```

Global functions

Global functions can be used in conditionals, etc.

Parameters

Name	Description
name	The name of the calling function. Typically “gv”.
param1.. paramN	Parameters transmitted to the calling function. In the case of "gv", can be merely an x-path journey. See the sample.

Other notes

In the export name used in print templates no numbers can be used. For instance, “webdk_item/myfield2" cannot be found, while "webdk_item/myfield_b" can.

Samples:

```
 {opt tids=27992,28007,34111}{sb p=/webdk_data/webdk_item}
Type: {gv p=../webdk_item_type/item_type_name_translation/et}
Title: {gv p=pealkiri}
Our no: {gv p=reg_nr}
Your date: {gv
p='''webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_id=''<<reg_nr_odid>>
'']/reg_kp'''}
```

```
Your no: {gv
p='''webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_id=''<<reg_nr_odid>>
'']/reg_nr'''}
Date: {gv p=reg_date}
Content: {gv p=summary}
Nonexistent variable: {gv p=minu_muutuja req=''false''}
Connected field of one object (e.g. data from the personal card):
{sle n=lh
p='''webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_id=''<<lahetatav_id>
>'']'''}
{glv i=$lh.0 n=Isik}
```

{table p=webdk_routing}

Role	Who	Task
{tgv n=rt_role_name}	{tgv n=rt_perf_name}	{tgv n=rt_task}

{/table}

Displaying values of a cross-table in a table

{table p=kaubad/rows/row}

{tgv n=nimetus}	{tgv n=kogus}	{tgv n=summa}

{/table}

* Connected outgoing letters (type ID=28007):

```
{sle n=a
p='''webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_type_id=''28007'']''
'}
{foreach from=$a item=i name=testloop2}
{$smarty.foreach.testloop2.iteration}.
- ID: {glv i=$i n=item_id}
- Type ID: {glv i=$i n=item_type_id}
- Name: {glv i=$i n=item_name}
- Creator: {glv i=$i n=item_creator_name}
- Created: {glv i=$i n=item_create_time t=date}
{/foreach}
```

* All connected documents:

```
{sle n=a p=webdk_relations/webdk_relation/webdk_slave_item/webdk_item}
{foreach from=$a item=i name=testloop3}
{$smarty.foreach.testloop3.iteration}.
- ID: {glv i=$i n=item_id}
- Type ID: {glv i=$i n=item_type_id}
- Name: {glv i=$i n=item_name}
- Creator: {glv i=$i n=item_creator_name}
- Created: {glv i=$i n=item_create_time t=date}
{/foreach}
```

* Displaying multiple-value selection field:

```
{sle n=a p=MVV/selection}
{foreach from=$a item=i name=mvv1}
{$smarty.foreach.mvv1.iteration}.
- Code: {glv i=$i n=code}{if xpc("glv",$i,"item_id") eq "K2"} (Special code){/if}
- Value: {glv i=$i n=value}
{/foreach}
```

* Displaying multiple-user selection field:

```
{sle n=b p=MUSEL/record}
{foreach from=$b item=i name=musel1}
{$smarty.foreach.musel1.iteration}. {glv i=$i n=name}{if !$smarty.foreach.musel1.last},
{/if}
{/foreach}
```

* A complex option where the card has a single object selection that is mirrored into connections (duplicate connections).

```
In the given example, the field export name is "object", i.e. its ID is actually in the
field "object_id".
Here is an example on how to display information from among connected objects by using
the ID in the object field.
{gv
```

```
p='''webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_id=''<<objekt_id>>'']/item_name'''}
```

Routing info

{table p=webdk_routing}

Role	Execution time	To:	Resolution	Status (of routing)	Note / response	
{tgv n=rt_role_name}	{tgv n=rt_status_time}	{tgv n=rt_perf_name}	{tgv n=rt_task}	{tgv n=rt_status_tr}	{tgv n=rt_task_answer}	{tgv n=rt_answer_comment}

- Conditional sentence: {if xpc("gv","arv") eq 77}JAH ON 77{else}EI OLE 77{/if}
- Generation of context-based tables:

```
{sle n=lvvphk p='webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_type_id=2177]'}
{foreach from=$lvvphk item=i}
```

- Name: {glv i=$i n=nimetus}
- Code: {glv i=$i n=kood}
- Subtable: {table c=$i p='webdk_relations/webdk_relation/webdk_slave_item/webdk_item[item_type_id=2359]'}

Subname	Description
{tgv n=nimetus}	{tgv n=kirjeldus}

{/table}{/foreach}

Output

```
Type: Incoming letter
Title: Letter from Webware OÜ-
Our no: 1.2/11
Date: 15.11.2007
Content: Notice of regular server maintenance
Nonexistent variable:
Connected field of one object (e.g. data from the personal card): Andres Maasikas
```

Role	Who	Task
For information purposes to be sent also to:	Mait Kauss	
Person in charge	Eero Pealis	Please specify the date

Displaying values of a cross-table in a table:

Name	Quantity	Amount
ID card reader	5	500
Keyboard	2	300

- Connected outgoing letters (type ID=28007):

```
- ID: 34555
- Type ID: 28007
- Name: 4.11/68-1 test letter
- Creator: Erki Kaldjärv
- Created: 03.12.2007
```

- All connected documents:

```
1.
- ID: 34248
- Type ID: 34111
- Name: document 1
- Creator: Erki Kaldjärv
- Created: 03.10.2007
2.
```

- ID: 34255
- Type ID: 34111
- Name: document 2
- Creator: Erki Kaldjärv
- Created: 06.10.2007

3.
- ID: 34262
- Type ID: 34111
- Name: document 3
- Creator: Erki Kaldjärv
- Created: 06.10.2007

- Displaying multiple-value selection field:

1.
- Code: K1
- Value: AAA

2.
- Code: K2 (Special code)
- Value: BBB

- Displaying multiple-user selection field:

1.
- ID: 123
- Name: Erki Kaldjärv

2.
- ID: 2345
- Name: Ants Kalda

- A complex option where the card has a single object selection that is mirrored into connections (duplicate connections).

In the given example, the field export name is "object", i.e. its ID is actually in the field "object_id".
Here is an example on how to display information from among connected objects by using the ID in the object field.
My object name
* Conditional sentence: YES

* Generation of context-based tables in a cycle:
Ordinary values:
Name: Product name Code: Product code
Subtable:

Subname	Description
Subproduct 1	Long description 1
Subproduct 2	Long description 2

Possibility to associate contacts register with a document

For what?

The more dynamic contacts register allows for, with the help of the contact data field, adding an unlimited number of contacts to a document (e.g. multiple addressees to an outgoing letter) and send the document to multiple addressees in the same sending window. A document can be submitted to multiple different e-mail addresses at once.
Based on the inserted characters, the system automatically offers contacts from the register. In the add contact window, the data is grouped based on the organisation, its contact person and address.
The composition of the address data fields is predefined: country, city, county, rural municipality, street, house no, flat no, farmstead, postal code. The composition of the address field is compatible with the address data system ADS.

How to set up?

If your organisation has put a contacts register into use before the fifth version of WebDesktop and you are interested in putting the new contacts register solution into use, we advise consulting the user support of Webware OÜ in the matter of data migration.

Setup of the contacts data type

1. To manage contact data, the data type extension name must be **"kontakt"**.
2. In the new contact addition window you can display the following data fields regarding the organisation and the contact person:

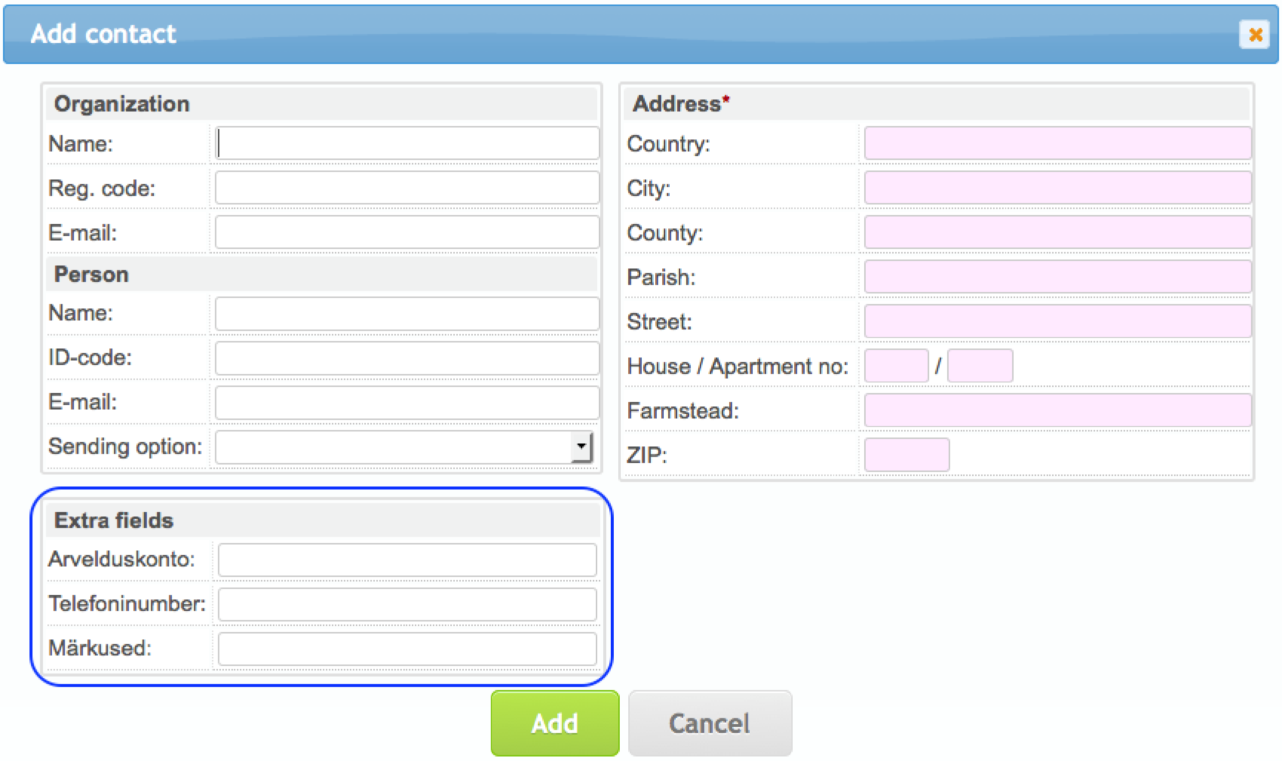
Add fields to the contact type.

Name	Field type	Extension name
Type (legal person/natural person)	selection	type
Agency	text	org_name
Reg. code	text	org_code
Agency's e-mail	e-mail	org_mail
Name of the person	text	per_name
Personal identification code	text	per_code
Peron's e-mail	e-mail	per_mail
Address	address	address

Adding organisation-specific data fields

(WD 5.2.1 - 22.09.2015) To insert specific data fields (e.g. a current account) directly from the contact card, add the data field and set "**ctm**" in the beginning of the name of the extension of the field. e.g. "ctm_currentaccount".
Make certain that the contact data type is related to a directory where contacts will be gathered further. If the unit solution has not been activated in WebDesktop, i.e. the variable "WEBDK_UNITS_ENABLED" is not active, **the contact type must not be connected to multiple**

catalogues. (WD 5.2.0 - 22.12.2015) If in WebDesktop units are activated or the variable “WEBDK_UNITS_ENABLED” is active, the contact type may be related to multiple directories.



Manners of sending documents

Set the manners of sending a document in the classifier. To that end you need to create a classifier titled “**Manner of sending of document**”. Possible manners of sending include e-mail, DVK, hand delivery, courier, etc.

Binding document data type (e.g. incoming document, outgoing document, contract) to the register of contacts

In order to connect the registration form of a document data type to the register of contacts, the following adjustments need to be made:

1. Set the extension name to the subtype (main type) of the document, e.g. "Correspondence" or "Contracts". The name of the extension can be freely chosen, but it must not contain non-English characters, numbers or spaces.
2. Add the “Contacts” field to the main data type of the document (in the look block, set “OUT” as the direction).
3. If the main data type has subtypes, add the “Contacts” field to them as well and set the direction of the field type (in the look block). For instance, in the outgoing document, the direction is “OUT” and in the incoming document the direction is “IN”.
4. Create a connection between the data type of the contact and the contact itself.
5. Make certain that the document data type is related to a directory in the tree where data will be gathered further.

How to use?

For further information, see the standard user manual.

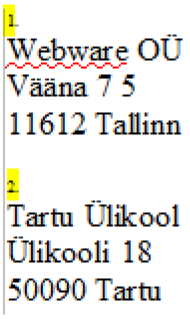
Displaying the contact (Sender/Recipient) in the print mall

To display data from the contact field, use the following:

```
{sle n=c p=saaja/contact}
  {foreach from=$c item=i name=contacts}
  {$smarty.foreach.contacts.iteration}.
           Organisation names :{gv c=$i p=organization/name}
           Organisation Reg.. code: : {gv c=$i p=organization/code}
           Organisation e-mail : {gv c=$i p=organization/mail}
           -------
           Name of the person : {gv c=$i p=person/name}
           Personal ID code: {gv c=$i p=person/code}
           Personal e-mail : {gv c=$i p=person/mail}
           -------
           Country : {gv c=$i p=address/country}
           City : {gv c=$i p=address/city}
           County : {gv c=$i p=address/state}
           Rural municipality : {gv c=$i p=address/parish}
           Street : {gv c=$i p=address/street}
           House number : {gv c=$i p=address/house_nr}
           Flat number : {gv c=$i p=address/appartment_nr}
           Farmstead : {gv c=$i p=address/household}
           Postal code : {gv c=$i p=address/zip_code}
{if !$smarty.foreach.contacts.last}============================================{/
if}
{/foreach}
```

[See also sample print templates]

Contact order number



If you want to make certain that the contact does not display its ordinal number, remove the following from the template:

```
{$smarty.foreach.contacts.iteration}
```

Displaying a certain (the first, second, etc.) contact in the print template

Next, you can choose which contact (ordinal number) you wish to display in the template:

```
{sle n=a p=saaja/contact}
Only the first name of the organisation is shown here:: {gv
p=organization/name c=$a.0}
```

Adjustment of the settings of the third party signature solution

For what?

In WebDesktop it is possible to share each document by e-mail to an external party (client, contractual partner, contractor, etc.), thereby determining whether the external party can merely read the document or also sign it.

The adjustment possibility regarding whether the ID card/Mobile ID is required for access (in such an event, the personal ID code of the party must be inserted) or whether a universal access key is generated (no personal ID is asked, everyone with a link can sign).

You can limit the meta data fields to be shared.

You can establish restrictions to a party's IP address.

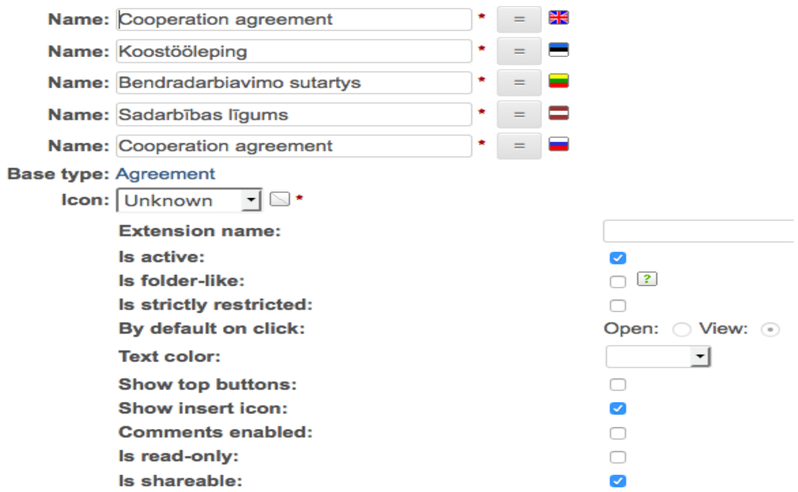
You can set a general temporal restriction on access.

You cannot change past sharing, but you can delete them.

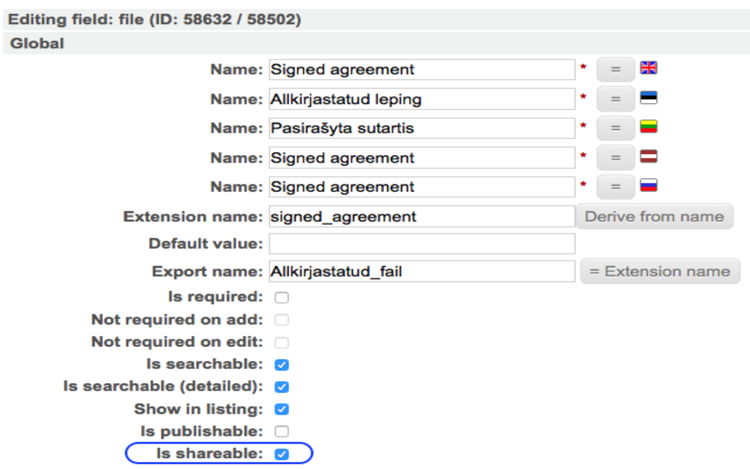
The person who shares a document receives an e-mail notification on all the activities of the party.

How to set up?

> Please note: The sharing functionality must be switched in from the configuration file first. The user support of WebDesktop performs the activity.



1. The data type must first be marked as shared. To that end tick "is shareable".



Next to the fields you need to determine separately which fields are to be shared. To that end you need to tick the field “Shareable”. For instance, if you want to share a signed file, you need to tick "Shareable" in the settings.

How to use?

[See the regular user manual.](#)

Informing a citizen of a registered document

For what?

The general guideline of the Public Information Act makes the following recommendations.

2. It is advisable to respond to a digitally received enquiry with an automatic notice of the receipt of the document. This precludes citizens’ additional enquiries/questions about whether the document arrived.

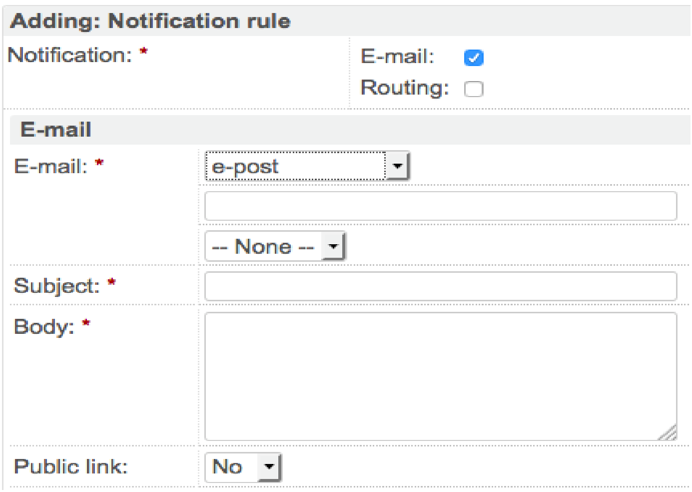
3. It is especially advisable to use an IT solution that allows for communicating to the enquirer their matter number based on which the person can observer the progress of the proceedings in the register of documents or another procedural register.

(Source: [General guidelines of the Public Information Act](#), “§ 11. How to ensure that a request for information and a request for clarification are not mixed up?”, Tallinn 2010-2014)

To follow this recommendation, you can set in the data type notifications in WD that the notification link refers to the public interface. Using the public link, local authorities can create a notification rule where after receiving a document from a citizen they send the citizen an automatic notification on registration along with a link to the public interface of WebDesktop.

How to set up?

- Open the settings of the respective data type management, e.g. “Management” → “Correspondence” → “Incoming document” → “Change type”.
- Scroll to the “Notifications” block. Click on the "Add new" button.
- A window for adding a notification rule will open. [For general information on notifications see here.](#)
- The data type must contain the e-mail address type field and it must be chosen in the notification rules. Each document register entry must also contain the e-mail address where the system should automatically send an e-mail notification.



- Adjust the subject of the notice and the content before moving to the public interface link. A link to the access restriction of the register entry will be added to the e-mail notification. If the status of the document access restriction is “Do not show in the public interface”, no link will be added to the e-mail notification.
- Choose “Public link” → “Yes”.
- Adjust the notification condition as to when the automatic notification will be sent, e.g. on the same day as the registration date of the document.

> **Example of a non-published document:** Your letter has been registered. ID: 74936
> Document: 2-14/18, request for information on xxx, J.J (74936)
> There is no link, because the entry is not visible in the public interface!

Adjustment of settings in Outlook

In order to ensure that the OL plugin registers the required data in the case of the desired data type directly from the mailbox to DHS, the settings of DHS should be checked.

- **The registrar must have writing rights regarding the series related to the data type and the counter.**
- **The system must have at least one data type that has a reply connection to some other data type.** For instance, if an incoming document already has a reply connection to an outgoing document, the requirement is fulfilled.
- The possible settings of data fields are as follows.

Field type in WD	The name of the field in WD (the name depends on the environment)	Adjustment in the WD block E-mail fields (incoming)
Text	Title	Subject
text	Content	Body
date	Date of sending	Date
file	File	Attachment 1
files	Files	Files

As of plugin version 1.0.5, the OL plugin can register default values if they have been set.

Adjustment of default values in the Outlook plugin

Default values (VV) can be adjusted for the data field in order to fill the field when a document is registered in WD or via the OL plugin.

The following table compares data fields, describes the adjustment of default values and in the case of which data fields and manners of registration (WD/OL plugin) you can use default values.

Field	Adjustment of default value (VV)	Does it work when registering in DHS?	Does it work upon registration via Outlook?	Additional notes
1. e-mail	Field “Default value”: e-mail address	yes	yes	-
2. yes/no	-	no	no	-
3. homepage	URL	yes	yes	-
4. date	0 or today (=registration date)	yes	yes	-
5. date and time	2 years 18:00; fills in the field automatically with the date two years ago and the time of 18:00	yes	no	-

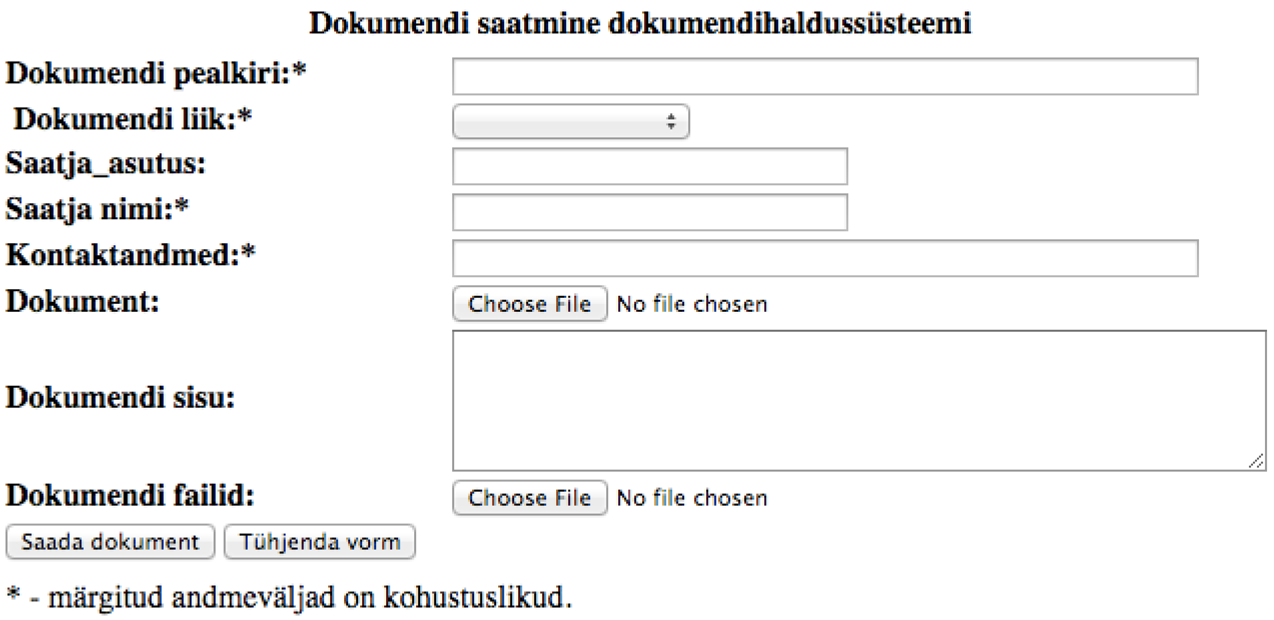
6. counter index	In the look block “Counter” / “Do not register" → with the help of "Counter" the type is tied to a specific counter	yes	yes	A counter must have been created for the type
7. selection of multiple users	1) In the look block, the desired group must be selected in the sub-block “Selectable users in groups” from which all users will be transferred; 2) tick the field “Select users”	yes	no	-
8. mrttekst	The field „VV multi-row text (also with a line spacing it is fine)	yes	yes	If the HTML format is switched in the look block and format mrttekst (e.g. add bold, italic), the contents of the field will become illegible.
9. number	The field „VV“: number	yes	yes	-
10. text	The field “VV”: text	yes	yes	-
11. selection	1) In the look block you must enter the classifiers. 2) In the "VV” field you must fill in with the value of one option.	yes	yes	-
12. selection of one user	1) The field “VV”: username	yes	no	In OL, only “u” is transferred, even though “new.user” has been designated as the username.
13. file from WD*	In the look block “Default file” → click on the magnifying glass	yes	no	-
14. file from an Outlook attachment	E-mail fields (incoming) → File 1	x	no	-
15. files from an Outlook attachment	E-mail fields (incoming) → files. By default, add "**1**" to the default value field. Please note: the default value can be set only for a multiple-file field.	x	yes	-
16. cross-table	In the look block “Table rows”: the respective JavaScript code	yes	no	-
17. syst. field	In the look block, choose some status, e.g. "Done".	yes	yes	-

* Default value attributed to the file or multiple-file field may give an error message in the plugin.

Registration of documents from the public web

For what?

Via the public web or a website it is possible to guide persons who do not use WD to register document rights into WD. This functionality can be used for the submission of, for instance, applications, requests for information or other document types.



Dokumendi saatmine dokumendihaldussüsteemi

Dokumendi pealkiri:*

Dokumendi liik:*

Saatja_asutus:

Saatja nimi:*

Kontaktandmed:*

Dokument: Choose File No file chosen

Dokumendi sisu:

Dokumendi failid: Choose File No file chosen

Saada dokument Tühjenda vorm

* - märgitud andmeväljad on kohustuslikud.

How to set up?

- Contact the WebDesktop user support who will active in the configuration file the functionality of addition of a document from the public web.
- After that you can create a respective form in WD and in the general settings of the data type you can adjust whether the data type / subtype can be added from the public web.
- If the data type / subtype is adjusted so that it can be added from the public web, there will be a "Can be added from the public web" field in the settings of data fields (text, number, mrtekst, selection, file and multiple-file field).
- Thereafter create yourself or have your IT staff create a website that, among other things, sets out the WD data type ID and the names of compliant data field extensions.
- If the public web document form has been created, inform the WebDesktop user support of the location of the public web document form so that it would be specified in the configuration file.
- Finally, create the group "Registrars of public web documents" extension titled "public_web_documents".

How to use in WD

On the opening page, the block of incoming / non-registered documents submitted via the public web is displayed to the members of the group "Registrars of public web documents". If there are multiple public web document types and these are in multiple series, the registrar of a public web document will only see the documents of the series that the registrar is authorised to see.

Temporary received public web documents or existing entries in WD can be adjusted for further registration under other desired data types. A person who makes re-registrations must belong to the group “Registrars of public web documents” whose extension name is “public_web_documents”; otherwise the data fields are not filled upon transfer. Adjust the data types as follows: * on the type from which you wish to transfer data, put a tick in the “Can be added from public web” box and thereafter you can put a tick in the type “Can be added from public web”* to which you wish to transfer data; you need to set the suitable type in the selection "Public web document" and thereafter you can choose the "Public web document field" from the fields.

PLEASE NOTE: The data fields must overlap (there can be more data fields, but not less). - Make certain that the dynamic name rule is the same as that of the type from which you wish to transfer data.

Determining the pdf-file name

On the merger of files see the standard user manual.

By default, the user must add the name to the uniform pdf file. However, it is possible to use the name of the document title field upon creating a uniform pdf file. To that end you need to specify “title” as the name of the extension in the text field of the data type (the field type is a one-line text). First, WebDesktop tries to find the name of the "title" extension from the main type and thereafter from the subtype, i.e. if a text field has been derived for subtypes from the main type and the main type specifies “title” as the name of the extension, "title” is defined as the name of the extension of all subtypes of type x.

Menus

Structure of menus

Menu “Search”

In the search menu, the specific dynamic data types of the organisation are displayed and static data types follow:

- discussion;
- User;
- Object;
- unit;
- task.

Menu “Add new”

In the addition menu, the specific dynamic data types of the organisation are displayed and static data types follow:

- admin;
  - Subfunction;
  - Subseries;
  - Function;
  - Group;
  - User;
  - Counter;
  - Series;
  - Unit;
- discussion;
- file;
- Calendar;
- Catalogue;
- survey;
- Tasks.

Menu “Management”

In the management menu, the specific dynamic data types of the organisation are displayed and static data types follow:

- Discussions;
- e-mail;
- Groups;
- Calendars;
- Users;
- surveys;
- Counters;
- User information [My information];
- unsent e-mail;
- Printing grounds;
- desktop admin;
- News;
- units;
- Tasks.

Adjustment of menu settings

> The settings of menus must be adjusted very carefully so that they will not bring about unwanted consequences.

For what?

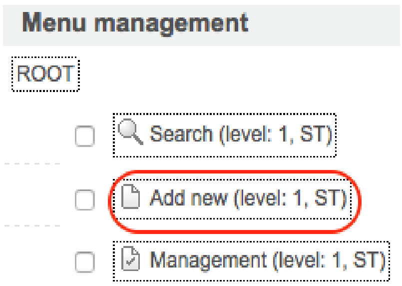
There can be various reasons for adjusting menu settings:

- there are many menu items and they should be gathered or restructured somehow;
- certain data types should not be visible to all users;
- the data type could be searchable for users, but not addable.

How to set up?

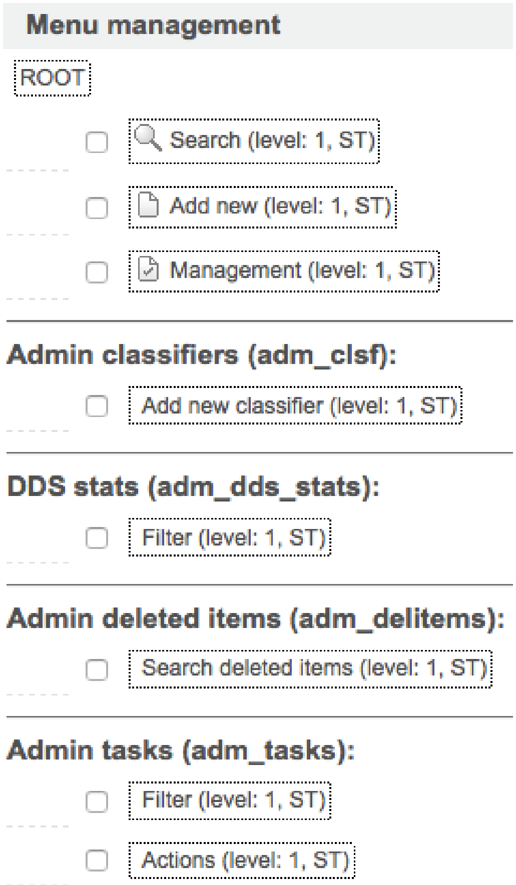
Let us assume that in the “Add new” menu it is necessary to structure contracts so that they will be divided into general contracts and human resources management-related contracts.

1. Choose “Management” → “Desktop admin” → “Menus”.
2. The menu management window will open.
3. Click on “Add new”.



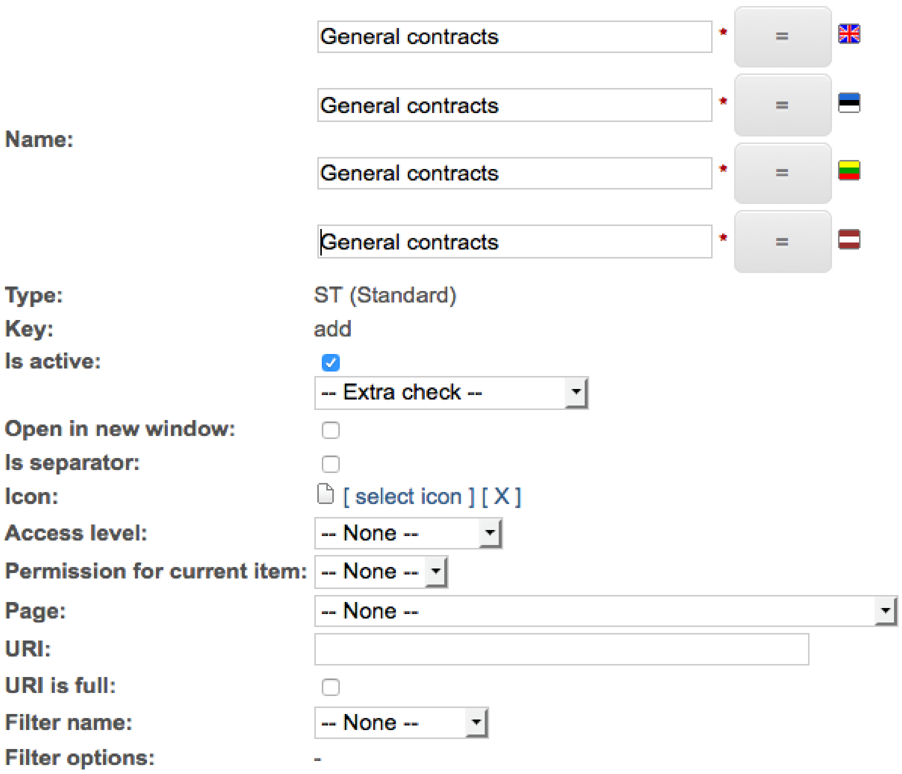
4. The “Add new” menu will open. To add menu item “General contracts”, click on the button 

in the window. on the right.
5. On the right, the window for adding a new menu item will open and there you can adjust the following fields:



- Name - the name of the menu;
- Type (cannot be adjusted);
  - St (standard), i.e. the built-in type;
  - Dt (dynamic type);
  - Ud (user defined);
- Key (cannot be adjusted);
- Is active – determines whether the menu is active.
- Extra check
  - SSO enabled – is Single Sign-On activated;
  - Asterisk enabled – is compatibility with IP telephone activated;
  - SquirrelMail enabled – is the e-mail module set up and activated;
  - DVK enabled – is the DVK module set up and activated;
  - Active X editor activated – direct editor based on Active X.
- Open in new window – opens the menu in a new window;
- Is separator – a separator in the menu which is a separating line that consists of dashes;

- Icon – selection of icons. The selected icon is displayed in the menu before the name.
- Access level – selection of the user level in terms of who is authorised to see the menu item;
- Permission for current item – the level of granting rights to an active object;
- Page – the list of pages for reference;
- URL – link insertion field;
- URL is full;
- Filter name – chance to filter based on page;



- Filter options;
- Groups – the possibility to set groups who are authorised to see the menu item;
- Index.
- Usually, "Name" (name of the menu item) and "Groups" (the right to see the menu item) are adjusted. Finally, click "Save".
- A new menu item is created in the "Add new" menu. In order to move the menu item to the right location, put a tick before it. 

- In the window on the right, click on the button 

.
- Determine the location where you want to put the menu item. To that end, click on the higher-level menu item "Contracts" so that a black frame is created around it. 

- In the window on the right, click on the button 

.
- The menu item "General contracts" is now in the right place. In order to make certain that staff-related contracts have their own menu item, repeat the aforementioned actions.

Search system

There are various search options in WebDesktop

Global search

For what?

With the help of the global search window you can search for documents/objects throughout the system within the limits of your access rights.

- See also the standard user manual.

How to set up?

In order to ensure that the global search is as effective as possible, the respective adjustments must be made in the data type management block "Dynamic name rules".

Search form

How to set up?

The composition of the search words in the search form depends on the settings of the fields and you can do it using the cells "Searchable" and "Detailed searchable" in data type management.

Saved searches

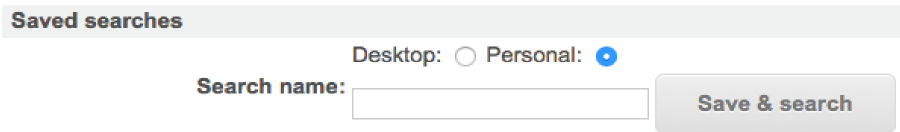
For what?

The saved search functionality allows for saving searches with the most frequently used search criteria and reusing them later. Each user can save their necessary searches using the detailed search form. The desktop administrator can add saved searched to all users of the desktop.

- See also the standard user manual.

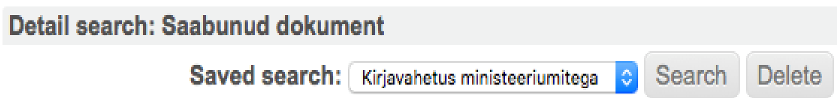
How to set up?

Go to the detailed search form and insert the search criteria.



At the bottom of the search form there is the "Saved searches" block where you can choose whether the saved search is displayed to all users (select "Desktop") or just to you ("Personal").

Give the saved search a name and click "Save and search".



Searches are saved using the detailed search form. In the drop-down menu you can choose the required search; to run the search click on "Search".

Object search

Object search allows for searching based on the dynamic name rules of data types in the system. In addition to types and subtypes added in type management, you can search from among the names of all internal objects (directories, functions, subfunctions, series, subseries, calendars, calendar events, groups, counters, tasks, desktops, users, files, discussions, units).

- See also the standard user manual.

Counters

For what?

Counters give a document the last (list) part of the registration number. A registration number is given to a document automatically and, as a rule, the counters do not need to be changed, but by way of exception it may be necessary to reset the counter at the beginning of the year or when the records management procedure of the organisation changes. Upon the first introduction of the system, data types must be bound to the counters. Right can be attributed to counters. The registration number of a document can be attributed prefixes and suffixes.

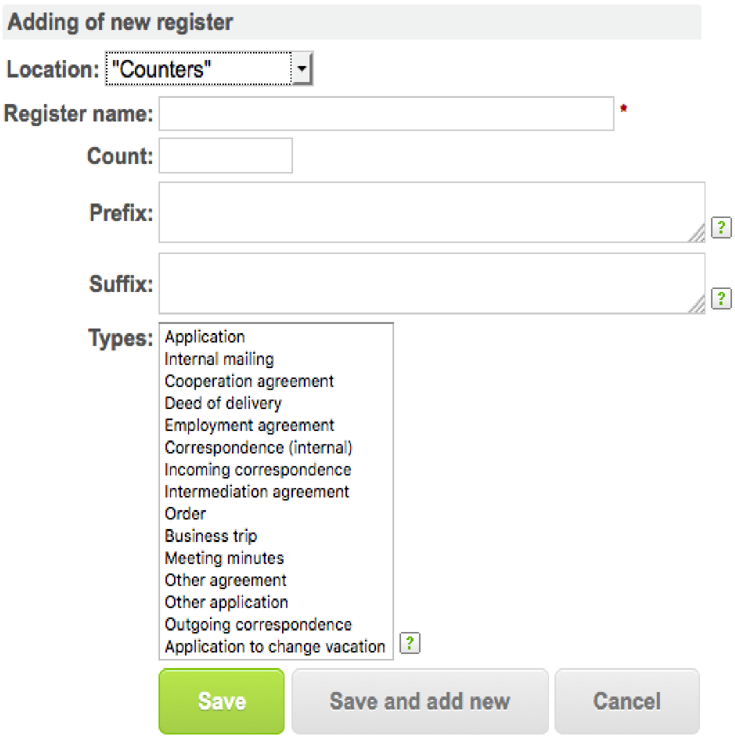
How to set up?

Adding a new counter

Choose “Add new” → “Admin” → “Register” in the menu.

According to need, fill in the following fields:

- Location – location in the tree;
- Counter name – the name of the counter (preferably in the form of the data type counter, e.g. “Correspondence”);
- List – the number of the counter value (in the case of commencement of records management insert “0” (zero)).
- Prefix – a prefix attributed to a registration number, e.g. to get the registration number -3.2-1/3, "" must be written in the "Prefix" row.
- Suffix – a suffix attributed to a registration number, e.g. to get the registration number 3.2-1/3, "" must be written in the "Suffix" row.
- Types – data types that use the counter. Multiple types can be selected by holding down the Ctrl key.



After filling in the fields, click on “Save” or “Save and add new” until all the counters have been created.

Change of counters

1. To change the counter name, suffix, prefix or data type, choose “Management” → “Registers” or find the counter from the tree.
2. In the counter name row in column “Actions” click on “Change”.
3. Make the required changes in the fields (see the instructions on how to add a counter).
4. Save the changes.

Resetting counters

At the beginning of the year, most counters are usually reset in order to start the numbering of documents from number "1" in the new year of records management.

Counters can be reset:

- individually – see the resetting of a counter;
- all selected counters at once. For that purpose choose “Management” → “Registers”, tick all the counters that need to be reset and click on “Set selected registers to null” at the bottom of

the page. The resetting of counters does not change documents that have already been registered in the system, but upon registration of new documents (in a new year of records management) the registration number starts from one. Documents registered in different years of records management, which have the same registration number, are distinguished based on the registration or creation date.

Deletion of counters

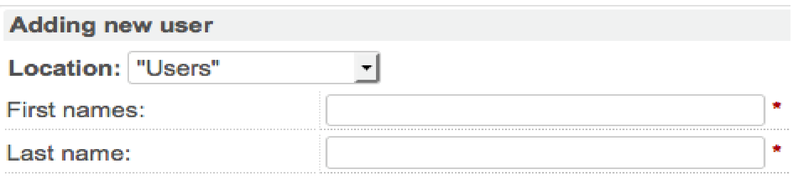
Before deleting counters, make certain that the counter is not associated with a data type that is in use. To delete a counter, choose “Management” → “Registers” or click on the counter directory in the tree and find the counter that needs to be deleted. In the counter name row in the "Actions” column click on “Delete” or tick the required groups and click on “Delete selected”.

Users

A user account is created for each WebDesktop user. The number of users of the system is regulated by the number of purchased licenses. Licenses are used-based.

Adding a user

Choose “Add new” → “Admin” → “User” in the menu. User account card is opened with the following blocks:



Location – the location in the tree (usually the catalogue titled "Users");

- **First names** – the given name(s) of the user;
- **Surname** – the user’s family name.

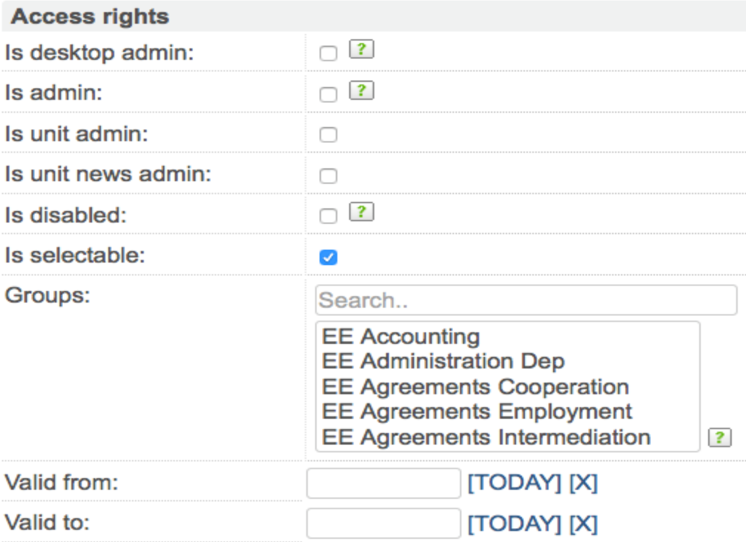
Identification

Username – the name with which the user logs in the system (preferably in the form of givenname.surname or personal identification code).

- **Personal identification code** – the user’s personal identification code. It needs to be entered if you want to enter the system using an ID card or Mobile ID.
- **Password** – the user’s password. The password must be at least 8 characters long and contain uppercase and lowercase letters and numbers. If the user enters the system using their username and password, they must insert their old password to change the password. Upon entering the system using an ID card or Mobile ID, the old password is not asked.
- **Password again** – enter the password again;

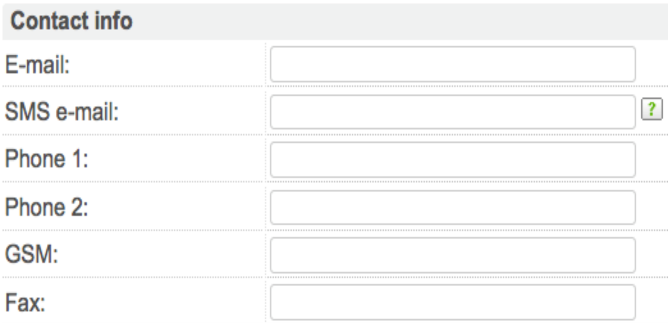
- **Demand that the password be changed**.

Access rights



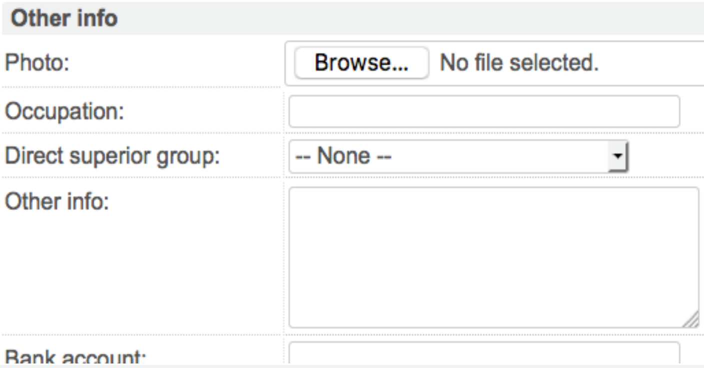
- **Is desktop admin** – granting the desktop administrator rights (the field is displayed only to the user in the super administrator rights).
- **Is admin** – granting the rights of the regular administrator.
- **Is unit admin** – granting the rights of the unit administrator.
- **Is unit's news admin** – granting the rights of the unit's news administrator.
- **Is passive** – the user cannot log into the system. Usually, it is marked when the user leaves the organisation.
- **Selectable** – the user can be selected via a single user field and via a multiple-user field and routing can be set to the user.
- **Groups** – the user's group membership (at least "Organisation name employees"). Users who do not belong to any group do not have any rights in the system. To choose multiple groups, hold down the Ctrl button.
- **Valid as of** – you can adjust as of what date the user can log into the system.
- **Valid until** – you can adjust until what date the user can log into the system.

Contact info



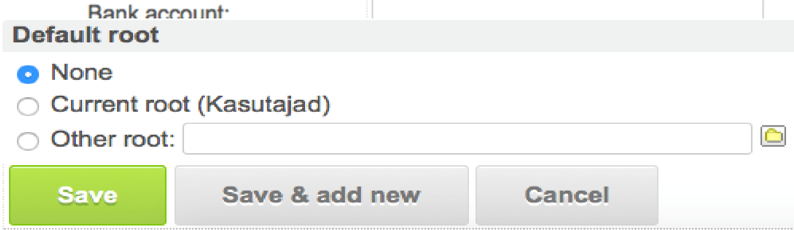
- **E-mail** – the user's e-mail address (routing reminders and other system notices are sent to the address). Please note: It is important to specify the e-mail address of each user, because only then will the user get reminders and other system messages to their e-mail.
- **SMS e-mail** – the mobile service provider must have activated the respective service that allows a GSM phone to receive reminders and other system messages from WD.
- **Telephone 1** – the user's telephone number.
- **Telephone 2** – the user's additional telephone number.
- **GSM** – the user's mobile telephone number (required for entering using the Mobile ID);
- **Fax** – the user's fax number.

Other information



- **Photo** – you can add the user’s photo (all formats that the web browser used is able to display are suitable).
- **Job title** – the user's job title.
- **Other information** – additional information in connection with the user.

Default root directory



The default root directory gives an additional chance to mark “Starting from default root directory” in the search terms using an additional tick in the detailed search card option; after that, documents below the selected directory will be displayed in the search.

- **None** – there is no default root directory (always chosen by default).
- **Active catalogue** – the active directory displayed above in the location bar at the moment is set as the default root directory.
- **Other directory** – possible to choose as the default root directory from among all directories entered in the system.

Change of the user

To change the data of a user, find the user either in “Management” → “Users” or in “Search” → “User”. At the end of the user data row (in the "Actions" column) or on the user card click on the "Change" button and make and save the required changes.

Change of the user unit

If you have taken a user account from under one unit and placed it under another then, in order to display the right unit in the list view, choose “Management” → “Users” and click on the “Update units” button in the list view.

Deletion of users

PLEASE NOTE: Users are not deleted, but marked as passive. Passive users cannot enter the system, but all the information related to them is preserved. To mark a user as passive, find the user either in “Management” → “Users” or in “Search” → “User”. At the end of the user data row (in the "Actions" column) or on the user card click on the "Change" button, tick the box “Is passive” and save. You can only delete users who have not taken any step in the system (i.e. registered, routed, etc.).

Viewing active users

The desktop administrator has the right to view active users. In order to view the list of users currently active in the system, choose “Management” → “Desktop admin” → “Active users”.

Login history

Username	Name	Status	Time	IP
triinversis	Triin Versis WebWare	OK	16.06.2016 14:54	90.190.179.146
piretpalgi	Piret Palgi WebWare	OK	16.06.2016 14:51	90.190.179.146
triinversis	Triin Versis WebWare	OK	16.06.2016 13:40	90.190.179.146
triinversis	Triin Versis WebWare	OK	16.06.2016 13:38	90.190.179.146
kerstitreulich	Kersti Treulich WebWare	OK	16.06.2016 13:36	90.190.179.146
triinversis	Triin Versis WebWare	OK	16.06.2016 12:44	90.190.179.146

The desktop administrator has the right to view active users. To view the login history, choose "Management" → "Desktop admin" → "User logins" from the menu. To search the login history, there is an additional "Actions" menu in the upper right, which is divided into "Search" and "Stats".

Through "Search" you can search for logins based on the username, name (given name and surname of the user), period and IP address. "Statistics" shows the number of logins per user and in brackets the % it accounts for the total number of logins.

Delegation of user routing

The standard administrator and the unit administrator (to the extent of the users of the unit) have the right to delegate user routing. Delegation of user routing is used, for instance, when the user falls ill and their routing is pending or the user leaves the organisation and has forgotten to cancel or delegate their routing.

To delegate user routing, find the user either in "Management" → "Users" or in "Search" → "User" and open the user card. In the user card, click on "User routings" after which the user's statistics map will open.

Active routings (14)

Item	Role name	Create time	Status	Due date	Task	Display on front page
test	Teadmiseks	15.04.2016 13:46	VIEWED			Yes
234	Kooskõlastamiseks	15.04.2016 13:29	VIEWED			Yes
Riina Raju	Kooskõlastamiseks	15.04.2016 13:02	VIEWED			Yes
, saadetud dokument nr: 1-1/89, VOLIKIRI	Edasi suunamiseks	22.02.2016 15:01	NOT VIEWED			Yes
, saadetud dokument nr: 1-1/89, VOLIKIRI	ID-kaardiga allkirjastamiseks (koostaja)	22.02.2016 15:00	NOT VIEWED			Yes
, saadetud dokument nr: 1-1/90, VOLIKIRI	Eriõigusi ei saa	22.02.2016 14:51	FEEDBACK			No
, saadetud dokument nr: 1-1/96, VOLIKIRI	Kaspari suunamised kontrollimiseks	22.02.2016 14:46	NOT VIEWED			Yes
5-3/20;Liisu Usin	Täitmiseks	22.02.2016 14:45	NOT VIEWED			Yes
5-2/9Mihkel Mutt{{104027}}1/2Kuld Lokike	Kooskõlastamiseks	09.02.2016 12:54	NOT VIEWED			Yes
5-3/15;Liisu Usin	Vormistamiseks	09.02.2016 12:49	NOT VIEWED			Yes
5-3/17;Riina Raju	ID-kaardiga allkirjastamiseks (koostaja)	09.02.2016 12:48	FEEDBACK			No
Maasikas tööleping nr 1-5.2/9 -	Täitmiseks	25.01.2016 12:59	VIEWED			Yes
AB/2;Miisu Kiisu	ID-kaardiga allkirjastamiseks (koostaja)	05.01.2016 12:52	VIEWED			No
5-2/11Luule Raamat{{104027}}5/3Ants Kaval	Täitmiseks	17.12.2015 12:42	VIEWED			Yes

Delegate selected routings

All routings

Status	Count
VIEWED	6
COMPLETED	6
NOT VIEWED	6
CANCELED	5
FEEDBACK	2
WAITING	1

Cancel

1. Put a tick in front of the routing that you wish to delegate.
2. Click on the yellow figure icon behind the cell in order to choose the user whom you will delegate the routing.
3. Click on the button "**Delegate selected routing**".

Access rights system

Access to data kept in the system and to various intra-system actions may depend on:

- the user’s level;
- group membership;
- the unit;
- the adjusted special rights solution.

See also the administrator levels in order to get an overview of the access rights of system users, incl. administrators.

Groups

For what?

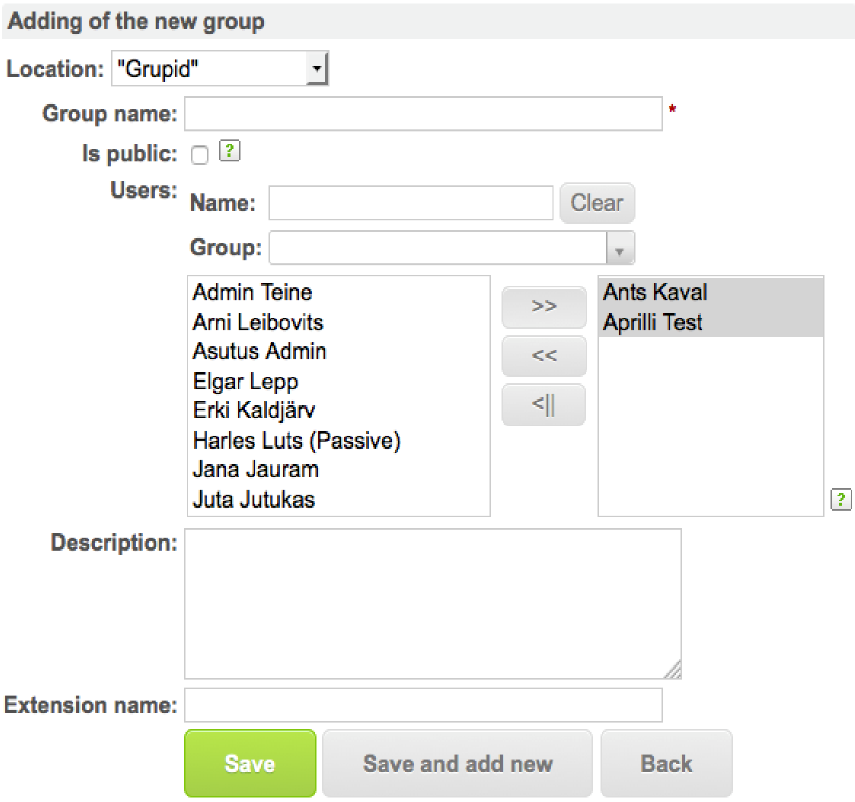
In WebDesktop, rights are granted on a group basis. The standard administrator and, within the unit, the unit administrator have the right to manage groups. All rights are realised based on group membership. In every organisation there is at least the group of the organisation’s employees “[Organisation name] employees” where all the users belong. The group membership of the employees of the organisation provides the user with minimum rights required for using the system. It is advisable to create, for instance, departmental groups, the management group and the office group (since documents move via the office, their employees usually have more rights), when necessary.
Groups are, in turn, related to directories in the tree. Thus, group rights apply only to a directory related to it (and to everything that is in the given directory).

> Please note: All users (incl. desktop administrators) must be divided into groups. 1. If rights have been established on group basis to documents displayed in the menu (for further information see Menus), the documents will not be displayed to the desktop administrator either if the desktop administrator does not belong to the respective groups. 2. If an employee is deprived of the rights of a desktop administrator for some reason, the employee will not see any document upon absence of group rights.

How to add a new group?

Choose “Add new” → “Admin” → “Group” in the menu.

- Location – the location of the group in the tree (usually the catalogue titled "Groups").
- Group name – the name given to a group (e.g. management, department name).
- Is public – used only for publishing the required series of the register of documents.
- Users – selection of users belonging to the group.
    - o Name – searching for a user based on the name.
    - o Group – searching for a user based on the group.
- Description – additional



information about the group.
- Extension name– the field is filled in if a specific special solution is used (the field is visible if extensions are allowed).

Division of group-based rights

> The standard administrator and, within the unit, the unit administrator have the right to divide group-based rights.

As a rule, all the employees of the organisation (i.e. the group “[Organisation name] employees) are given the writing right (incl. the reading right) throughout the tree and in the lower branches of the tree access to specific data (e.g. employment contracts, staff information, etc.) is limited. The users who do not have reading rights cannot see directories/(sub)functions/(sub)series/units in the tree either. The right to write is, however, an exceptional right and, as a rule, should not be granted.

Types of rights:

- **Preview** – the ordinary user only sees the list view (all entries in the same view), but the meta data card of a specific document cannot be opened;
- **Reading** – the ordinary user can view the document but cannot change or delete it.
- **Writing** – the ordinary user can add and change a document;
- **Deletion** – the ordinary user can add, change and delete a document.

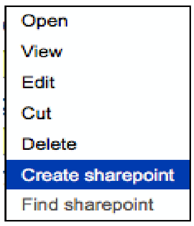
Icons related to the division of rights:

- Create rights – the icon depicting determining access rights;
- Find rights – the icon of viewing access rights shows the rights that have been established in the structural tree next to aforementioned catalogues and that transfer further to the catalogue that displays the key icon.

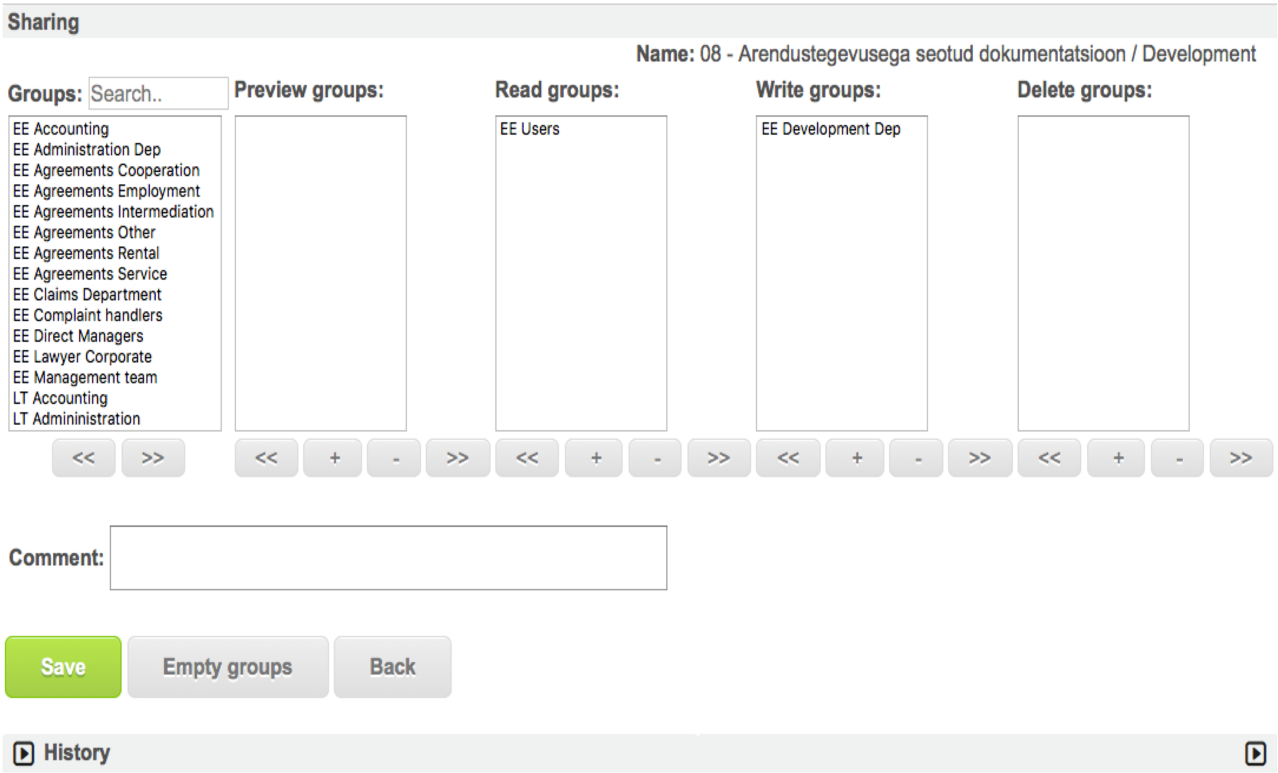
> Please note: You cannot determine the rights by pressing the key icon.

- Go to the respective level in the tree.
  a. If you use the tree in the list view, click on a level higher than the desired level in the tree and on the change of rights icon "Create rights".

  b. If you use the tree in the icon view, click on the desktop on the desired catalogue icon (in the icon view) and choose “Create sharepoint” from the menu.



- The window of division of rights is opened.



- In the left column of the table there is a list of all groups, which is followed by rights columns “Reading right”, “Writing right” and “Deletion right”. Click on the desired group (turns active) and with the help of the buttons << + - >> you can move the group to the column with the suitable right.
- In the comments cell you can add clarifying information on granted rights The added comment is later found in the history of creating the respective series/directory rights.

Publication is also implemented via group rights.

Viewing groups

- To view groups, choose “Management” → “Groups”.
- Click on the desired group name.

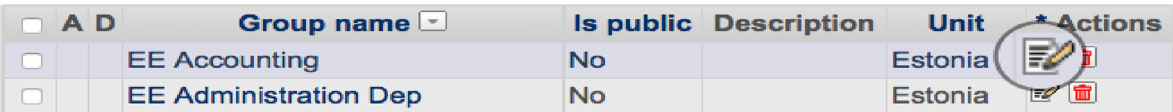
- In the user rights block, you see group members and their user rights to directories.

Changing groups

You can change users' group membership:

- on the user card, and
- on the group change form.

1. To change a group, open the group directory in the tree or choose “Management” → “Groups” in the menu.



2. Click on the “Change” button next to the respective group.
3. The group change card is opened where on the right persons belonging to the group are displayed and on the left all WD users are displayed. To put a user in a group, choose the user from the left and using the arrow to move the user account to the left (to relocate multiple users at a time, hold down the Ctrl key).

> **Good to know!** If you make a change in group X, i.e. you relocate a person or resave the group and “Selectable” – “No” is indicated in the user cards, all the non-selectable users will be removed from the group upon changing the group.

Deletion of groups

To delete a group, open the group directory in the tree or choose “Management” → “Groups” from the menu and find the group that you wish to delete. At the end of the group name row there is the deletion icon in the “Actions” column. To delete multiple groups, tick in the desired groups and click on the button 

.

Adjustment of the settings of desktop groups

On the desktop, you can adjust the settings of groups that determine ordinary users who can use

certain functionalities without being desktop administrators. These groups are:
- News editors group;
- Unlocking group;
- DVK registrars;
- DVK senders;
- archiving managers group;
- Survey editors group;
- distribution group.

The settings of the groups can be adjusted by the desktop administrator. For further information see Adjustment of the settings of the desktop.

Private rights

> Switched off by default. Can be switched on in the configuration file.

For what?

Special rights can be of help in the following events:
- in the case of a series/directory it is important that the ordinary users can add new documents and see their own documents, but the ordinary user should not see documents added by others;
- the ordinary user must be able to grant access to a specific document that they have access rights to.

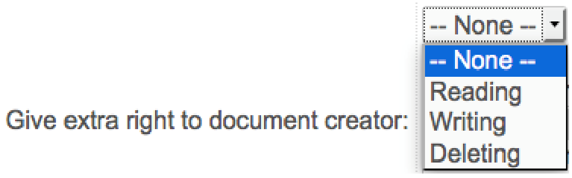
The easiest example this is staff documents, for instance, applications. Let us suppose that we have a series of applications under the staff function (e.g. holiday applications or the like). Since, by default, only human resource employees can see the applications and the applications of all different people are together under one series, we cannot grant the reading right there, because otherwise all of the people will be able to see everyone else's applications. The best way to resolve such a situation is the system of special rights regarding the (sub)function/(sub)series.

If the special rights system is switched on, there is a selection box “Grant special right to adder of document" in the (sub)function/(sub)series addition/change form. From there you can choose a special right that is granted to the user, e.g. a specific series, at the moment of adding the document (reading, writing or deletion). With the granted special right, the user can choose the required (sub)function/(sub)series from the “Location” selection in the respective register card without having the actual reading right regarding it. In such an event you cannot start addition from the tree, because the user does not have a real reading right to the given (sub)function/(sub)series.

A special right is not granted if the user already has an equal right to the directory. E.g. if the document is added by a human resources employee who holds the writing right to the series via groups, they will not get a special right. Through this system it is possible to adjust the settings so that users have the reading right to a series and the adder of every document obtains the writing right, i.e. the special right “Writing” is granted to the series.

How to set up?

If special rights are switched on from the configuration file, the field “Give extra right to document creator” will appear in the series/directory changing window.



Types of special rights:
- Reading – the ordinary user can view the document but cannot change or delete it.
- Writing – the ordinary user can add and change a document;
- Deletion – the ordinary user can add, change and delete a document.

Upon adjustment of a type of special rights (reading, writing, deletion), you must be aware of the fact that an ordinary user can delegate special rights of the same and lower level with regard to a special document. For instance, if special rights to a series have been granted to an ordinary user, the ordinary user will be able to forward the document added by them only for viewing ("Reading"), but also for changing ("Writing"), where necessary.

Field-based rights

For what?

Field-based rights can be granted only by a desktop administrator. You can set groups of rights for such activities as viewing, adding and changing for each meta data field. For instance, in the case of invoices, business trips, etc. to designate some fields as fields that can be filled in by and are visible only to the management.

How to set up?

To grant a field-based right move to the "Group filter" block in the settings of the field.

Private catalogue

For what?

The application of a private directory can be considered, for instance, if the documents are located in a series that is either public or accessible to a larger number of users, but whereby exceptions should be made to single documents (mark the as private), so that they would be visible only to the person who moved the documents to the private directory or to a group holding the respective rights.
In type management, tick in "Move to private directory" in the data type. This will create the button "Move to private directory" for the creator of the document and the desktop administrator in the entry view form. If you press it, the entry will be moved to a private catalogue under the series (the program will automatically create the respective directory) and you obtain a special right to the document and are able to delegate the right, if necessary. "Private group" is automatically added to the writing groups of the private catalogue. If necessary, you can also determine ordinary group rights to a private catalogue.

How to set up?

> Please note: The private directory functionality must be switched on from the configuration file first. The user support of WebDesktop performs the activity. In the case of a private directory you can have the name of the directory and the name of the private group adjusted from the configuration file. By default, the name of the directory is "private" and the name of the group is "Private group".

1. Tick "Move to private directory" in the desired data type, which will create the button "Move to private directory" in the entry view form. **PLEASE NOTE: The "Move to private directory" button will be displayed only to the desktop administrator and document creator.**
2. If necessary, determine members of the private group.

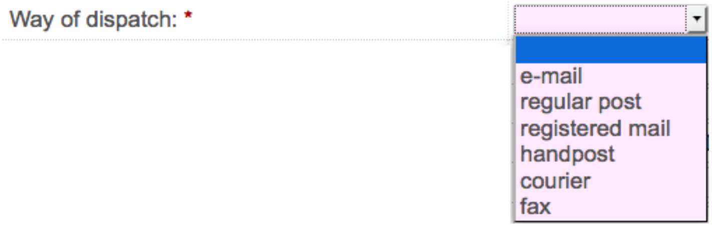
How to use?

See the use of a private directory from the standard user manual.

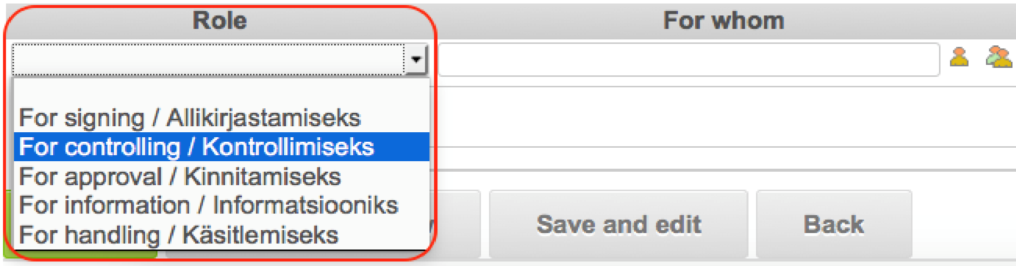
Classifiers

The desktop administrator has the right to manager classifiers. Classifiers in WD are divided into two groups:

- classifiers that can be used in metadata fields;



- Selections related to the program logic.



They are managed accordingly:

- “Management” → “Desktop admin” → “Classifiers”
- “Management” → “Desktop admin” → “Selections”

In WD, there are currently the following selections:

- default routings;
- discussion reply types;
- dynamic object field roles;
- event categories;
- event responses;
- preserve time;
- restriction bases;
- routing roles;
- task categories;
- task priorities;
- task responses;
- task statuses.

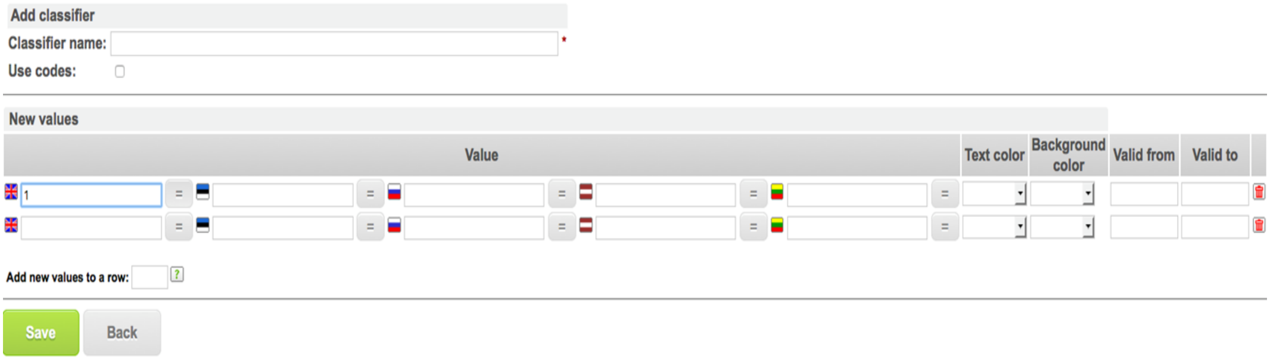
Since the choices are related to the program logic, they should not be changed without a valid reason.

Adding a classifier

Inserted classifiers can be bound to the meta data fields of the types “Selection” and “Multiple selection”. In such an event the values do not need to be inserted separately, but the values of already inserted classifiers are used.

1. To add classifiers, choose “**Management**” → “**Desktop admin**” → “**Classifiers**”.
2. Left of the "Search” menu in upper right click on “Add new classifier”.

If you have decided to create a new classifier, the window "Add classifier" will be opened.



- **Classifier name;**
- **Use codes** – the possibility to code the values.
- **Values** – list of values. Upon displaying each value, a new row is displayed automatically.
- **Add new values to row no.** – you can determine to which row in the selection a new value is added.

Save the changes after adding the values (and, where necessary, coding).

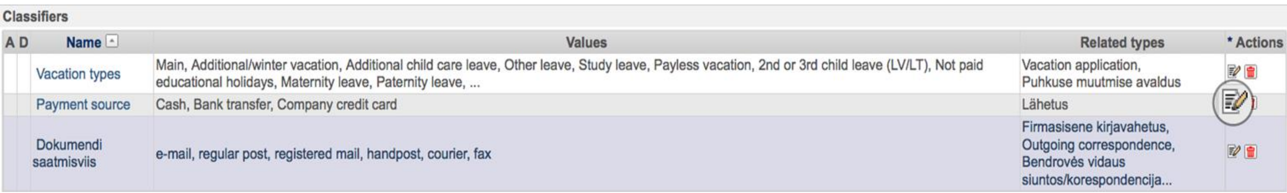
> Upon saving values with the same code, the system alerts that values with the same codes are used in multiple places in the list of classifiers. The warning will vanish once the codes have been fixed and there is no more overlapping. **Example**
>
> Klassifikaatorite nimekirjas on mitmekordselt kasutusel klassfikaator koodiga trt ning väärtusega Tartu. Samad koodid ja väärtused on ridadel 3, 1.

Binding classifiers to a selection field

For further information on binding to a classifier see ‘Data type management’.

Change of a classifier

1. Choose “**Management**” → “**Desktop admin**” → “**Classifiers**”. You will see a list view of classifier names, values and related data types.



Classifiers

A	D	Name	Values	Related types	Actions
		Vacation types	Main, Additional/winter vacation, Additional child care leave, Other leave, Study leave, Payless vacation, 2nd or 3rd child leave (LV/LT), Not paid educational holidays, Maternity leave, Paternity leave, ...	Vacation application, Puhkuse muutmise avaldus	
		Payment source	Cash, Bank transfer, Company credit card	Lähetus	
		Dokumendi saatmisviis	e-mail, regular post, registered mail, handpost, courier, fax	Firmasisene kirjavahetus, Outgoing correspondence, Bendrovės vidaus siuntos/korespondencija...	

2. In the classifier list, click on the “Change” button after the classifier that you wish to change.

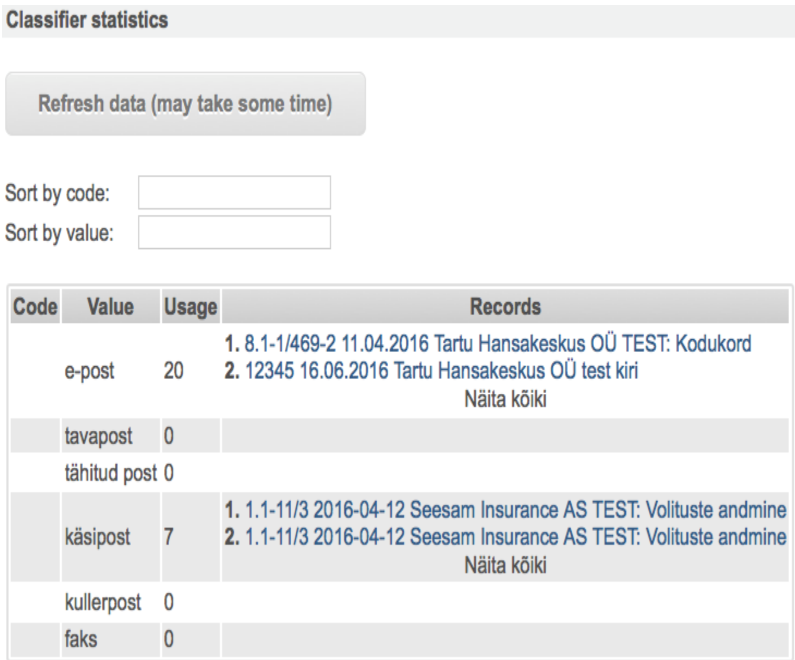
Classifier statistics

Classifier statistics allows for getting an overview of the classifier values in documents.

1. Choose “**Management**” → “**Desktop admin**” → “**Classifiers**”. To see classifier statistics, open the existing classifier.
2. Click on the “**Statistics**” button.
3. On the right side of the window, the frame "**Classifier statistics**" will open.
4. On the statistics page you will see a summary of the usability of the classifier values and two entries corresponding to the values are indicated. The number of entries displayed by default cannot be configured. To see more entries, click on the button “Show all”. To hide entries, click on the button “Hide all” or click on the entry row.
5. If the classifier contains many values and you scroll down the classifier statistics in the right-hand

frame, at one point you will see the button "**Back to top**" and if you click on it, you will be taken back to the stat of the classifier values.

6. You can sort entries based on the classifier code and the start of values. Upon using filtering, if the classifier is voluminous and it takes time to search for the respective entries, you will be shown the search icon “ ”.
7. If you wish to adjust the values of the classifiers right away, you can do so on the left side of the frame. To refresh the adjusted classifier statistics, click on the button on the right side of the frame “**Refresh data (may take some time)**”.
8. To close classifier statistics, click on "**Close frame**" in the left frame.

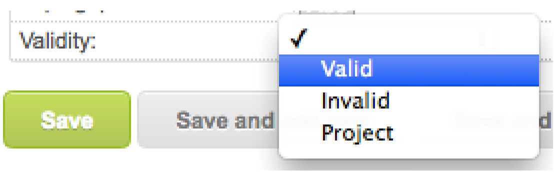


Adding/changing selections

All “Selection” type classifiers are added and changed similarly in the menu “Management” → “Desktop admin” → “Selections”. If you click on the name of the respective choice, the selection view form will be opened. The “Change” button opens the form for adding/changing choices. If there are more than five choices, the first five should be inserted and then saved. After saving, five new rows will be displayed and after inserting them, save them as well.

By ticking in the default choice at the end of the row (under the question mark) you can set the value as always chosen by default (e.g. upon addition of an event or giving a task). You can change the order of the choices using arrows and with the help of the "Delete" icon you can delete the desired selection value.

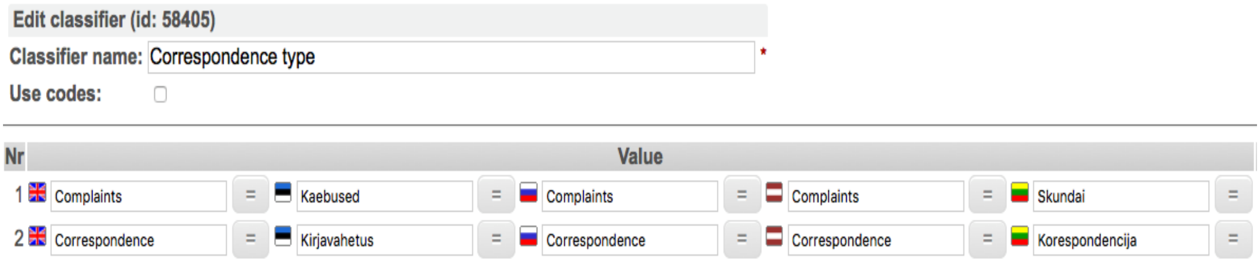
Translation of classifiers



Classifier values can be translated in the languages activated in WebDesktop. As of 30 March 2016, WebDesktop supports six languages: Estonian, English, Russian, Finnish, Latvian and Lithuanian.

> If only Estonian is active in the configuration, i.e. WEBDK_ACTIVE_LANGUAGES = ‘et’, the translation fields of the classifier are not displayed.

- To translate the classifier, move to the classifiers interface. For that purpose choose “Management” → “Desktop admin” → “Classifiers” and click on the desired classifier.
- The classifier changing window will open and there you can insert the translation on the respective language field.



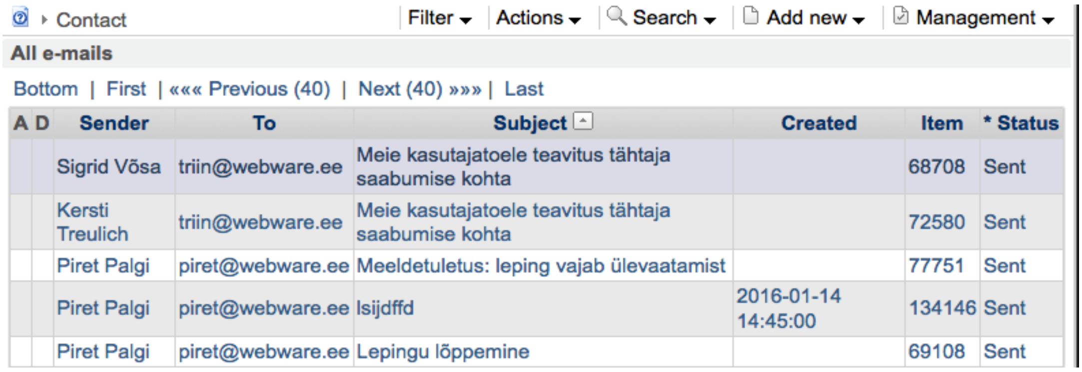
Outgoing e-mail

For what?

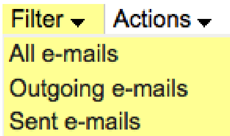
The outgoing e-mail module allows for getting an overview of all e-mail messages sent from WD in the past and to be sent in the future. E-mail messages to be sent in the future are, for instance, reminders of routing tasks related to a specific date. All administrators can use the outgoing e-mail module. The outgoing e-mail module is not displayed to an ordinary user.

How to use?

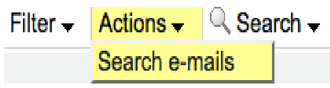
1. Choose "**Management**" → "**Outgoing e-mails**".



2. By default, all sent and outgoing e-mail messages are displayed. If necessary, you can filter e-mail messages as follows:
   - **All sent and outgoing messages** – e-mail messages sent and to be sent from the system;
   - **Sent messages** – only sent e-mail messages;
   - **Outgoing messages** – e-mail messages to be sent in the future.



3. In the "**Actions**" menu, you can search for e-mail based on the following search parameters:
   - **Sender** – e-mail sender, a WD user;
   - **To** – the recipient of the e-mail message;
   - **Subject** – the topic of the e-mail message;
   - **Made** – the time of writing the e-mail message;
   - **Sent** – the time of sending the e-mail message.



E-mail signature

For what?

E-mail signature is a pre-defined e-mail message signature whose content can be determined at the level of the desktop, unit and user. Thereby the so-called ultimate signature is taken into account, i.e. if a signature has been set for the desktop, the same signature will be displayed to all the users of the desktop. If the user has made their own signature, the signature set by the user will be displayed. If the signature has been set up, it will, by default, be added to the end of e-mail messages sent from WD and to the end of shared e-mail messages.

If the unit solution has been activated (it is usually executed by the WD user support), unit signature can be set.
If the option of the setup of the personal signature of a user has been activated by the WD user support, the user can set their own personal signature.

How to set up?

- To set up an e-mail signature:
    - **for all users of the desktop**, choose "**Management**" → "**Desktop admin**" → "**Desktop**". Enter the signature in the cell "**E-mail signature**".
    - **for all users within the unit,** choose "**Management**" → "**Units**". Enter the signature in the cell "**E-mail signature**". The data field is not displayed if the unit solution has not been switched on from the configuration file.
    - **for personal use,** choose "**Management"** → "**Settings"**. Enter the signature in the cell "**E-mail signature**".
- You can write free-format text in the cell and use row changes. To set up universal signatures (e.g. for all employees), use the following tags:
    - **[[user_first_names]]** – the user's given names;
    - **[[user_last_name]]** – the user's surname;
    - **[[user_occupation]]** – the user's job title;
    - **[[user_email]]** – the user's e-mail address;
    - **[[user_gsm]]** – the user's mobile telephone number;
    - **[[user_phone1]]** – the user's telephone number;
    - **[[user_phone2]]** – the user's additional telephone number.

How does the transition from the former signature solution to the new signature solution work?

If the user of signatures was allowed previously in the configuration file, the PHP scrip is activated upon a version update and it makes the former signature solution compatible with the new one, i.e. there will be an e-mail signature field in the settings of the desktop where the signature used earlier will be automatically set up for all desktop users and tags are used upon transferring the solution (see above).

See the use of signatures at the level of ordinary users.

Deleted items

For what?

If necessary, it is possible to get an overview of deleted objects and, if necessary, you can restore almost any type of deleted objects.

How to use?

1. To open the module of deleted objects, choose “Management” → “Desktop admin” → “Deleted objects”.
2. The list view of deleted objects will be displayed.

Asutus › Õunake › Kasutajad

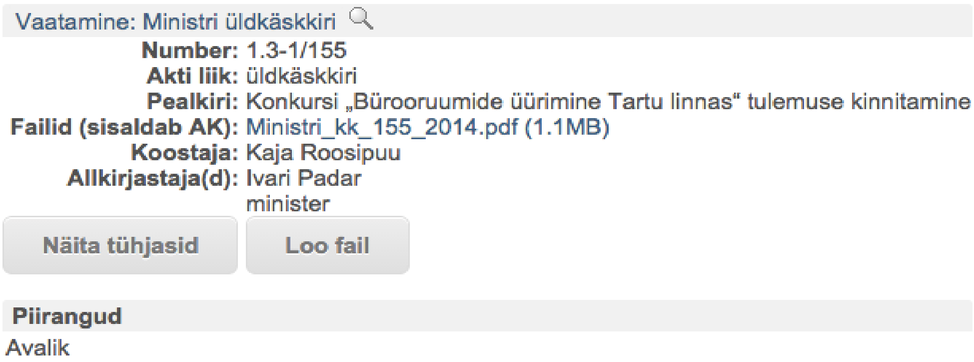
Bottom | First | ««« Previous (40) | Next (40) »»» | Last

A	D	Name	Type	Deleter	Delete time	Create time	IP	* Actions
		keegi	Birthday	Riina Raju	21.09.2015 08:54	2015-09-21 08:52:53.862332	90.190.179.146	
		5-3/10;Admin Teine	1_lähetuskorraldus	Riina Raju	11.09.2015 10:13	2015-09-11 09:55:44.630507	90.190.179.146	
		5-3/4;Liisu Usin	1_lähetuskorraldus	Riina Raju	08.09.2015 14:46	2015-06-12 15:42:39.115404	90.190.179.146	
		test	Folder	Riina Raju	26.08.2015 13:51	2015-08-26 13:51:35.042402	90.190.179.146	
		Hankelepingud	Dynamic subobject	Piret Palgi	10.08.2015 10:06	2014-12-09 10:40:36.705469	90.190.179.146	
		Juriidiline isik Reede AS	KONTAKT	Piret Palgi	10.07.2015 14:11	2015-06-26 13:26:11.077468	90.190.179.146	

3. **Restoration of an object**. From the same list view, you can restore objects from the last action column using the restoration button. Before deleting, you are also asked “**Do you really want to restore the object?**”
4. **Searching for an object**. To find a deleted object, choose “**Search for deleted objects**” in the menu bar.
5. You will be taken to the simple object search form where the following search fields are displayed:
   - Count result – for counting search results;
   - Name – details of the deleted object/document, which are specified in the dynamic name rules;
   - Deleter – the given names and surname of the person who deleted it;
   - Delete time – the date and time of deletion;
   - Create time– the date and time of insertion of the deleted object/document in the system;
   - Type – the name of the data type.
6. By clicking on detailed search, the user is taken to the object search form where a search is performed among all **undeleted** objects.

Publication of documents on the homepage

For what?



Via the public interface of the register of documents all web users can access public documents contained in the register. The WD's public interface complies with the requirements of the Public Information Act.

The following is displayed regarding a document:

- selected data fields;
- the restrictions block (if there are no restrictions, the word “Public” is indicated. If there is a restriction, the term of validity of the restriction, the ground for establishing the restriction and the establisher of the restriction are indicated);
- documents related to the document.

The connections block can be adjusted in such a manner that it is not displayed in the public interface (for that purpose contact the IT administrator). Series, types/subtypes and fields needs to be adjusted separately in order to publish a document.

How to set up?

The following steps need to be taken in order to public a document:

1. Create a new group, for instance, called “Myorganisationname public”. Upon creating the group, you must certainly tick the “Public” field. For further information on adding a new group see here.
2. Next to each series that is subject to publication add the publication group (“Myorganisationname public”) to the reading rights of the series.
3. Open type management. Choose the submenu “Management” → “Desktop admin” →“Types”. In the main types and their subtypes to be published, tick in the “Publishable” field. For further information on type management see here.
4. Under each specific type and subtype, define which underlying fields and other fields are to be published on the homepage. Next to data fields that need to be published, tick in “Publishable”. For further information on field settings see here.
5. **The register of documents along with a user manual must be available on the homepage of the organisation.** To that end, put the following link of the website http://test.webware.ee/?page=pub_startup&desktop=1020&tid=1&u=20101006132412=20090115080707&desktop=1020, where the desktop id (in the given example, 1020) and the WD address (test.webware.ee) must be replaced, respectively.
   - A direct link to the **search form** of the published data type:

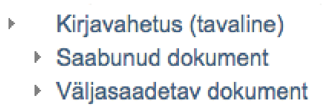
http://test.webware.ee/?page=pub_search_dynobj&desktop=1020&tid=99051, WD address (99051), dektop id (1020) and data type id (test.webware.ee) must be replaced accordingly.

- A direct link to the **list view** of the published data type: http://test.webware.ee/?page=pub_list_dynobj&desktop=57835&tid=99051, WD address (test.webware.ee), dektop id (1020) and data type id (99051) must be replaced accordingly.
- The next link displays in a filtered manner the list view of a published data type, e.g. in the given example, **e.g. in the given example, all entries registered on the data type of guidelines the value of which is "Treatment guidelines" are displayed:**

http://test.webware.ee/?page=pub_list_dynobj&desktop=1017&tid=304881&data_only=true&search=Otsi&field_306995_search_type=CO&field_306995_search_value=Ravijuhendid. To use the link in your organisation's intranet / DHS, the domain name of the environment along with respective IDs and values must be replaced.

Hide subtypes in the public interface menu

In the public interface menu, all main types with their subtypes, which are marked as "Publishable" are displayed.



If you wish to display only the main type in the public interface so that it will be possible to search for registered documents for the subtype via the main type, you need to tick the "**Hide subtypes in the public interface menu**".

Hiding a file on a restricted document

Additionally, you can mark a field as "Restrictable", which means that if the document has a restriction in the restrictions block upon registration, the field will not be displayed on the homepage. This modification is the most frequently used upon restricting file fields. **As of 1 January 2009, the Public Information Act has obligated state authorities to publish electronic documents that do not have access restrictions. Therefore, if a restriction is not indicated in the document, the file will be public on the homepage and if a restriction is indicated, the file will not be displayed on the homepage (i.e. the file is restricted).**

> Check the public interface before making a document available on the homepage. You can do so in the [data type](#) management where you will find the link "Public user interface of the type" next to the "Publishable" field.
>
> 
>

You will find more information on the publication of documents:

- [On the homepage of the Data Protection Inspectorate;](#)
- [In the Public Information Act;](#)
- [In the Personal Data Protection Act.](#)

Restrictions

- For further information on pre-defining the restrictions block, see the [chapter](#) 'Access restrictions'.
- [See the standard user manual on filling in the](#)restrictions block.

Displaying a contact in the public interface

In accordance with the requirements of the [Data Protection Inspectorate](#), initials of natural persons must be displayed in the public document register instead of their full names, i.e. if only the person part has been filled in the contact window, the name of the natural person will be displayed in the form of initials in the public register of documents. If the blocks of the organisation and person are filled in the contact card, WD will consider the contact person to be a legal person's contact person and the full name of the contact person will be displayed in the public register of documents. The name of the contact person of the organisation as well as the name of a natural person were displayed as initials in the public register of documents.

Adjustment of the settings of the document exchange centre (DVK)

For what?

The document exchange centre can be used by public sector authorities (ministries, local authorities, health care and child care institutions, etc.) in order to exchange documents, letters and e-mail messages between themselves.
Some advantages of DVK over e-mail:

- Unlimited size - the number and size of documents is not limited. Through DVK you can send thousands of large documents. Only the recipient may have a restriction, but it can easily be increased by simple means. Through DVK documents with a size of over 100 MB have been sent and they have arrived without any problems.
- Spam-free – the circle of recipients is closed and organisations are added via the Information System Authority. This precludes the possibility that advertisements or other unwanted messages are sent via DVK.
- Less manual work – the nationwide message XML is used. No need to perform any manual work upon receiving the document, because all required meta data fields are already filled in.

See also the DVK module of WebDesktop in the WD standard used manual.

How to set up?

In order to introduce the DVK and X-road service, the organisation must first be registered in the administration system of the State Information System.

Registration of the organisation in the State Information System administration system

The submitter of a subscription application must have authorisation to represent the organisation (e.g. an entry on the B card in the commercial register, a power of attorney signed by the chief executive of the organisation).

1. Enter the state information system management system https://riha.eesti.ee.
2. Click on the link “Organisation/undertaking’s SISAS subscription application” on the opening page or the link “Join SISAS” on the left side of the bottom bar of the SISAS application.
3. Fill in the opened subscription application form where you can designate the organisation's CIO or yourself as the SISMS administrator. The administrator should certainly be a representative of the organisation. If you submit the application based on a power of attorney, add the digitally signed power of attorney to the application.
4. Click on the button “Sign application with Digi ID/ID card”.

The organisation is deemed as registered in the SISAS once the application has been granted by the Information System Authority (a respective notice is sent to the applicant by e-mail).

Appointment of a contact person

The authorised person designated as the contact person has the right to fill in and submit an application for subscription to X-Road and to adjust the settings of the X-Road server. As a rule, the authorised person is an employee of Webware OÜ, unless the security server is located on your premises and your organisation administers it yourself.
To designate the authorised person:

1. Enter the state information system management system https://riha.eesti.ee.
2. The role of using the SISAS is displayed on the right side in the top bar of the application. Upon first entry to the SISAS, your role is “yourname (personal ID code)”. Click on the name of the role and in the opened top window choose the role with regard to which you have been given the rights of the SISAS administrator of your organisation.
3. On the desktop click on the link “Organisations” and thereafter on the name of the represented organisation.
4. Click on the link “Contact persons” (upon absence of the link, choose the right role).
5. Click on the button “Add contact person” (upon absence of the button, choose the right role).
6. In the field “Position (search by person's name)" enter "klemens-augustinus kasemaa" and click on "Search" (if your organisation administers the security server on its own, enter its name).
7. Choose "Application administrator – osaühing Webware (Klemens-Augustinus Kasemaa)”.
8. Choose “Operative” as the level of the contact person and click on the “Save” button.
9. Scroll down to the division “Rights” where next to the roles “Organisation’s X-road system chief” and “Security server administrator” click on the “+” sign and on the button “Save”.
10. Inform the user support of WebDesktop (support@webware.ee) when you have completed the stage.

Please note: Webware OÜ cannot take the following steps before you have completed the former ones.

Subscription to DVK (Please note: This stage is usually completed by a representative of Webware)

To subscribe, fill in a DVK subscription application in the state portal.

1. Open the link https://www.eesti.ee/portaal/evormid.naitaa=152&saaja=14222&caseid=&docid=&tegevus=UT
2. Log in with the ID card, fill in the form and submit the application.

If you want, you can complete this stage on your own as well.

Adjustment of the settings of WD

Upon adjustment of the settings of WebDesktop, you are assisted and guided by our user support who will contact you once you have completed all the aforementioned steps.

Designation of DVK registrars and senders

- You can register various user groups as registrars and senders of DVK documents. The group can be common, e.g. “DVK administrators”, and be used for sending as well as registration. To add a group, choose “Add new” → “Admin” → “Group”. Name the group, for instance, “DVK administrators”, choose the members and click on “Save”. For further information on adding a group see the chapter "Access rights system".
- In the desktop settings set the DVK registrar and sender groups. For that purpose choose “Management” → “Desktop”. To change the settings, click on the green “Change” button. In the opened form in the field “DVK registrars”, choose the respective group and click on “Save”. For further information on desktop settings see the chapter “Structure tree”.

DVK organisation list and general settings

1. Choose “Management” → “DVK admin”.
2. Determine the registration code of the organisation. This action is necessary because DHS can contain various organisations and on the basis thereof the interface knows which desktop to send the documents to. To set the registry code, the server must be in the DVK adjustment regime, i.e. in the ordinary situation the administrator cannot change it. In addition, the page has a list of organisations that have joined DVK and to whom you can send and from whom you can get documents via DVK. This organisation is indicated in the list in bold.

To refresh the organisation list, click on “Refresh organisations from DVK”.

Adjustment of data types and fields

DVK uses the nationwide letter XML. If the desired data types and meta data fields have been set up in WD, it allows for quickly and easily including the document in the document management system: all required meta data fields have already been filled in.

- Set the data type DVK type and its meta data fields.
  - Enter the incoming document type → "DVK type": IN.
  - Outgoing document type → OUT.
- Adjust the meta data fields (see the part on adjustment of the settings of incoming documents and outgoing documents).
- **If a type has a contacts field**, the "**Send**" button will be displayed in the entry. If the addressee is an organisation that has subscribed to DVK, i.e. the field of the registry code has been filled in on its contact card, the possibility to send via DVK will be displayed after clicking on the "Send" button.
- **If the type has the single object selection field**, the "**Send via DVK**" button will be displayed.

Adjustment of the incoming document type and data fields

Field type in WD	**The name of the field in WD (the name depends on the environment)**	**Adjustment in WD field settings "DVK type"**
text	Incoming document registration number	Document no
text / mrtext	Title	Title
text / mrtext	Comments	Comments
text / mrtext	Document type	Document type
text / mrttext	Sender organisation's registry code	Sender: Organisation code
text / mrtext	Sender organisation	Sender: Organisation name
text / mrtext	Sender's contact person's e-mail	Sender: Person's e-mail
text / mrttext	Sender's contact person's personal ID code	Sender: Personal identification code
text / mrttext	Sender's contact person	Sender: Name of the person
text / mrttext	Sender's contact person's department code	Sender: Person's department code
text / mrttext	Sender's contact person's department	Sender: Person's department code
text / mrttext	Sender's contact person's position code	Sender: Person's position code
files	Files	"General" blocks (located under the group filter block) → tick "For registration of DVK files"

Adjustment of the outgoing document type and data fields

choice	**The name of the field in WD (the name depends on the environment)**	**Adjustment in WD field settings "DVK type"**
counter index	Reg. no	Document no (author)

date	Reg. date	Document reg. date (author)
text / mrtext	Title	Title (author)
choice / text / mrtext	Document type	Document type (author)
text / mrtext	Brief content	Brief content (author)
text / mrtext	Comments	Comments (author)
text / mrtext	Connection reference	Connection reference (author)
text / mrttext	Recipient organisation's registry code	Recipient:organisation code
text / mrtext	Recipient's organisation	Recipient:organisation name
text / mrtext	Recipient's contact person's e-mail	Recipient:person's e-mail
text / mrttext	Recipient's contact person's personal ID code	Recipient:personal identification code
text / mrttext	Recipient's contact person	Recipient:name of the person
text / mrttext	Recipient's contact person's department code	Recipient:person's department code
text / mrttext	Recipient's contact person's department	Recipient:person's department code
text / mrttext	Recipient's contact person's position code	Recipient:person's position code
files	Files	"General" blocks (located under the group filter block) → tick "For registration of DVK files"

Add-on modules

In addition to the main document management module, the following modules can be used in WebDesktop:

- Calendars;
- Tasks;
- Favourites;
- News;
- Discussions.

Calendars

See the use of calendars in the standard user manual.

What can administrators adjust in calendars?

Event categorisation and usage report

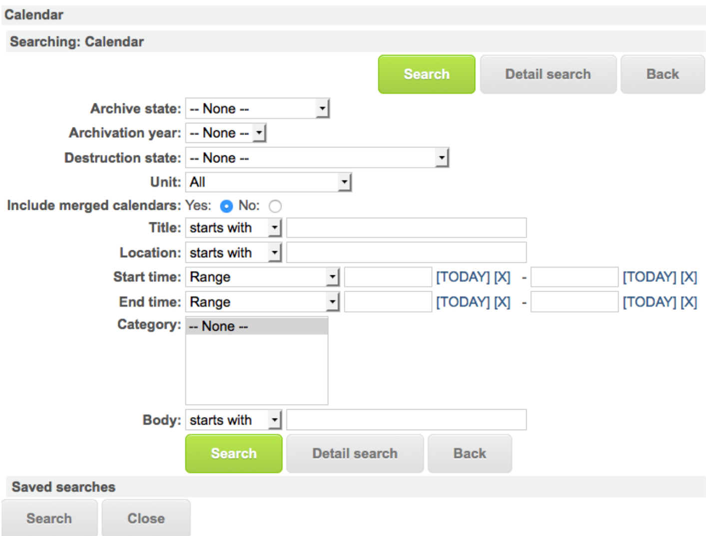
Upon insertion of each calendar event, you can determine its category. The desktop administrator can determine and adjust categories on its own.

- Choose “Management” → “Desktop admin” → “Selections”→ “Event categories” in the top menu.

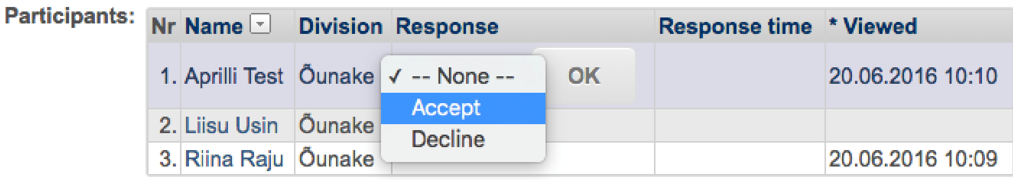
Time usage report

By categories, you can create time usage reports that display the number of hours in the respective category per participant (e.g. how many hours a month the employee has been attending training courses). All users have the right to generate time usage reports within the limits of non-private calendars.

- To create a report, open the calendar view.
- Click on the “Time usage” button.
- A search window will open. In the window, insert the title, period, category and other criteria and click on “Search”.



Management of event responses



If the user is noted as a participant in a calendar event, the user will be able to accept or decline their participation. This is done in the “Reply” column of the participants table in the event card. By default, the options “Accept” and “Decline” are set up by the system.

1. If you have desktop administrator rights, you can change the reply options by choosing “Management” → “Desktop admin” → “Selections” → “Event responses”.
2. Values in the “Status” column indicate whether the reply is positive or not.

Tasks

See the use of tasks in the standard user manual.

What can administrators adjust in the case of tasks?

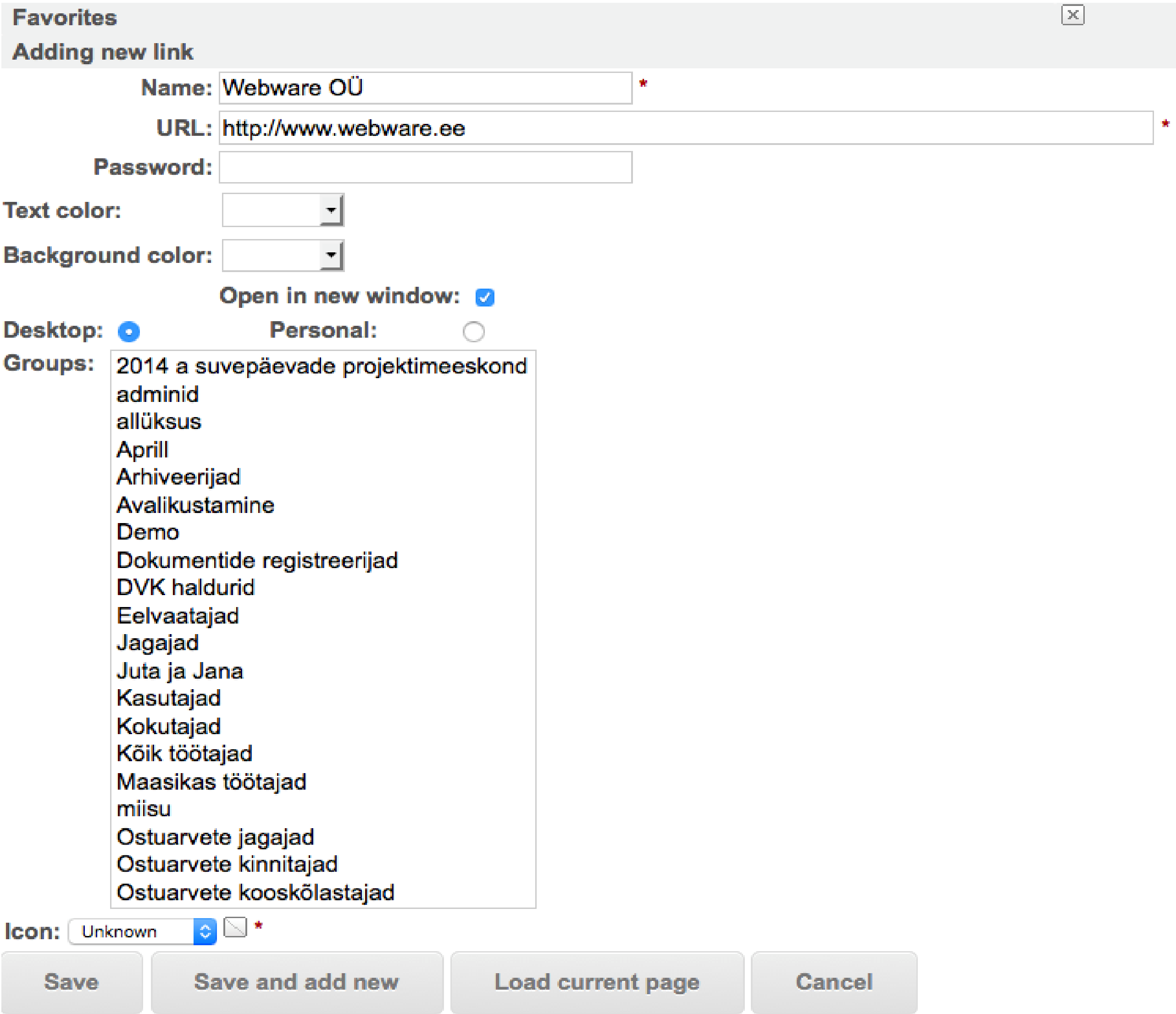
Task categories

- To add a task category, choose "Management" → "Desktop admin" → "Selections"→ "Task categories" in the menu.

Favourites

Regarding adding a new favourite, see the standard user manual.

As the administrator, you can set that a favourite is displayed to all users in the favourites block and, if necessary, in the top bar as well. You can also determine the group to which a favourite is displayed.



News

The desktop administrator can appoint news administrators. A unit's news administrators can also be appointed by the unit administrator.

- To appoint a news administrator, create a group called "News administrators" and add users who attend to news to this group.

- Choose “Management” → “Desktop admin” → “Desktop” and add the newly created “News administrators” group to the field “News administrators group”.
- To appoint a news administrator of a unit, activate the field "Is unit's news admin" in the user card (for further information on sharing user rights see here). Certainly, the user must be created in a directory located under the right organisation/unit.

Discussions

The desktop administrator can adjust replies to discussions. To that end choose “Management” → “Desktop admin” → “Selections”→ "“Discussion reply types”.

Changing configuration

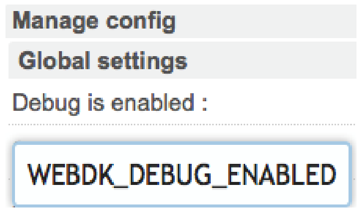
For what?

In WebDesktop, many developments can be adjusted in the configuration file as variables, e.g. to set up the third party signature solution you must activate it in the configuration file. The most frequent settings of the configuration file are gathered in the configuration adjustment module and the module can be used by a user who has desktop administrator rights.

> **Please note: USE THE CONFIGURATION ADJUSTMENT MODULE ONLY IF THE VERSION HAS BEEN UPDATED AFTER 30.10.2015. We have detected bugs in the module and will eliminate them in a version update.**

How to set up?

1. Choose “**Management**” → “**Desktop admin**” → “**Manage config**”.
2. A configuration adjustment window will open. In the window, the settings are divided between the following subject blocks:
   - general settings;
   - matters related to dynamic objects;
   - routing settings;
   - settings related to rights;
   - settings related to e-mail;
   - DigiDoc service.



3. When you move the cursor over the name of the configuration setting, the name of the variable to be changed in the configuration file will be displayed.

General settings

Debug information enabled

WEBDK_DEBUG_ENABLED

Debug information shows the capacity of the system and is of assistance in localising program bugs. If debug information is enabled, the respective box will be displayed in every window. Enabled by default.

Systemic e-mail

WEBDK_EMAIL_ADDRESS

General e-mail address that is shown as the sender’s address in the case of outgoing e-mail messages in WebDesktop. The default address is **webdesktop@webware.ee.**

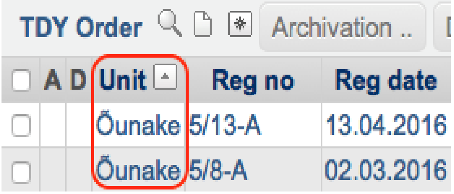
Session duration in seconds

WEBDK_SESSION_EXPIRATION

The duration of the session as of the moment when the form was saved in the system for the last time. By default, the session length is 7200 seconds, i.e. 2 hours.

Units enabled

WEBDK_UNITS_ENABLED



Merely shows units in different views: in the document search form and, for instance, in the document register view:

To enable the solution of units, see the variable WEBDK_STRUCT_UNIT_ENABLED

For further information on units, see the chapter “Structure tree”.

Language selection disabled in the top bar

WEBDK_TBAR_LANG_SELECTION_DISABLED

By default, the top bar has three languages: Estonian, English and Russian. In addition, Finnish can be displayed. If you disable the language choice, WD will use the language set in the configuration file by default.

Number of recently added documents

WEBDK_MAX_RECENT_ITEMS_TO_DISPLAY

Number of documents displayed on the opening page, which have been recently added by all users and me.

For further information, see the chapter “Desktop” in the standard user manual.

Show recent items on front page

WEBDK_SHOW_RECENT_ITEMS_ON_FRONT_PAGE

Enabling / disabling the displaying of recently added documents on the opening page.

For further information, see the chapter “Desktop” in the standard user manual.

E-mail from

WEBDK_EMAIL_FROM_NAME

The name of the sender of an e-mail message, which is displayed in the “From” field of the message sent from WD. As a rule, the name of the organisation should be given here (e.g. Webware).

Special rights enables

WEBDK_EXTRA_RIGHTS_ENABLED

Special rights can be of help in the following events:

- in the case of a series/directory it is important that the ordinary users can add new documents and see their own documents, but the ordinary user should not see documents added by others;
- the ordinary user must be able to grant access to a specific document that they have access rights to.

If you enable special rights, you can adjust from the configuration file when the special rights are granted, whether upon adding or, for instance, routing a document. You can also further configure which special rights are granted (e.g. either the right of reading or deleting).

For further information, see the chapter “System of access rights”.

Special rights upon addition

WEBDK_EXTRA_RIGHTS_AUTO_ADD_ENABLED

The user who starts adding a document to which they have no right via the group gets a special right after the registration of the entry. This means that only the adder and also persons related to groups and the admins have the right to access the entry. You can determine which special right is granted to the person who adds the entry. The selection includes the special rights of reading, writing and deletion.

Grant special rights upon addition

WEBDK_EXTRA_RIGHTS_AUTO_ADD_RIGHT

If the variable is ticked, the special rights block will be displayed next to document entries. If the given variable has not been ticked, the adder of the document is granted a special right, but it is not shown next to the document entry, i.e. a special right that has already been granted cannot be removed either.

Users entitled to grant special rights

WEBDK_EXTRA_RIGHTS_MIN_ACCESS_LEVEL

The minimum user level as of which special rights can be granted to documents. By default, the minimum user level is the standard (ordinary) user who has authenticated themselves in the system using a username and password or an ID card/ Mobile ID, I.e. if "**Authenticated user**" is selected, all users can share special rights. If "**Admin**" is selected, all administrators (incl. unit administrators, ordinary administrators and desktop administrators) can share special rights. In the case of "**Desktop admin**", special rights can be shared only by standard administrators and desktop administrators.

Saving a public document is enabled

WEBDK_PUBLIC_DOCUMENT_SAVE_ENABLED

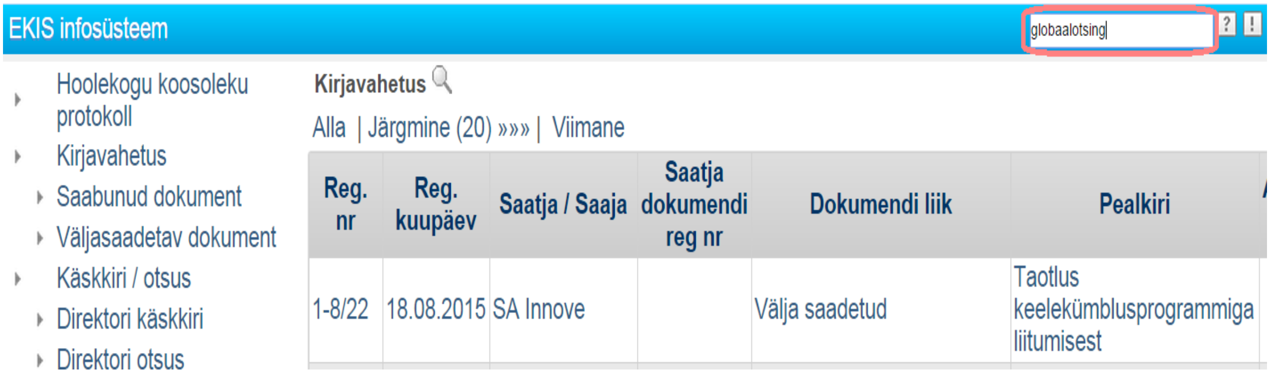
Via the public web or a website it is possible to guide persons who do not use WD to register document rights into WD. This functionality can be used for the submission of, for instance, applications, requests for information or other document types.

Global search enabled

WEBDK_GLOBAL_SEARCH_ENABLED

You can adjust in the public register of documents whether the global search field is displayed.

For further information on the public register of documents see the chapter "Publication of documents".



Number of classifier values

WEBDK_CRSTBL_CLSF_SELECTION_AUTO_LIMIT

Setting the classifier value limit in a cross-table, i.e. until which value number values are displayed in a drop-down menu and when will values be displayed as an AJAX selection.

For further information, see the chapter "Classifiers".

Tree enabled for everyone

WEBDK_TREE_FRAME_ENABLED_FOR_EVERYONE

You can determine whether the tree is displayed to all users or only to administrators. If the tree is prohibited, the tree cannot be switched on in the ordinary user's settings, while the unit administrator and other higher-level administrators can still use the tree.

For further information, see the chapter "Desktop" in the standard user manual.

Folder events enabled

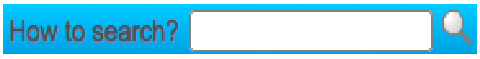
WEBDK_EV_SERIES_EVENTS_ENABLED
The event may be of help in the following cases:

- if a document is added to the directory, automatic routing with a specific role (e.g. signature) should be created on the desktop of the designated user and/or a notification should be sent to the e-mail address;
- if a document is changed in or deleted from the directory, automatic routing with a specific role (e.g. signature) should be created on the desktop of the designated user and/or a notification should be sent to the e-mail address.

See also the chapter “Structure tree”.

Global search title

WEBDK_GLOBAL_SEARCH_HELP_TITLE
You can add a title to the global search.



Global search text

WEBDK_GLOBAL_SEARCH_HELP_CONTENT

If you move the cursor to the global search title, the content related to the title will be displayed.

Mobile number is private

WEBDK_GSM_IS_PRIVATE
A mobile telephone number or the GSM field can be hidden from other ordinary users in the user card. Administrators still see the GSM field. See also the chapter “Users”.

Structural units enabled

WEBDK_STRUCT_UNIT_ENABLED
In order to enable the structural units solution.
For further information on units, see the chapter “Structure tree”.

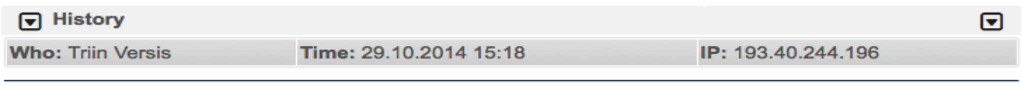
Structural unit classifier name

WEBDK_STRUCT_UNIT_CLSF_NAME
To determine the classifier of structural units on the user card from among whose values the names of the structural units are displayed.
The name of the classifier must not contain such non-English characters as “õ”, “ä”, “ö” and “ü”.
For further information, see the chapter “Users”.

Matters related to dynamic objects

History block is open by default

WEBDK_DEFAULT_LOGGING_EXPANDED



You can determine whether the log of document changes, or the viewings (history block) is closed or open.

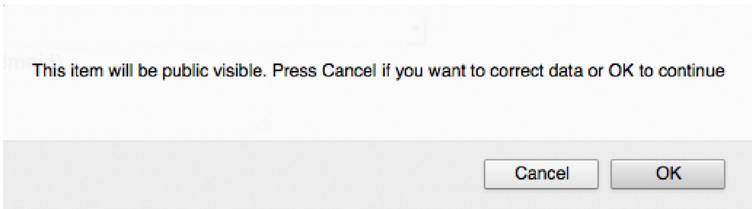
View logs enabled

WEBDK_VIEW_LOG
The view log preserves information on document viewings and file openings.
The view log is not retroactive.

Sharing enabled

WEBDK_SHARING_ENABLED
In WebDesktop it is possible to share each document by e-mail to an external party (client, contractual partner, contractor, etc.), thereby determining whether the external party can merely read the document or also sign it.
For further information, see the chapter “Third party signature”.

Sharing e-mail subject
WEBDK_SHARING_EMAIL_SUBJECT
Sharing e-mail body
WEBDK_SHARING_EMAIL_BODY
Grant right upon adding
WEBDK_SHARING_ADD_RIGHT
The minimum right that the user needs for sharing an entry. By default, the writing right is set as the minimum right in the configuration.
Warn upon publication of document
WEBDK_DYNOBJ_CHECK_PUBLIC_LOCATION_ENABLED
If the document does not have an access restriction and it is published in the public register of documents, the following warning will be displayed to the user: …
See also the chapter "Publication of documents".

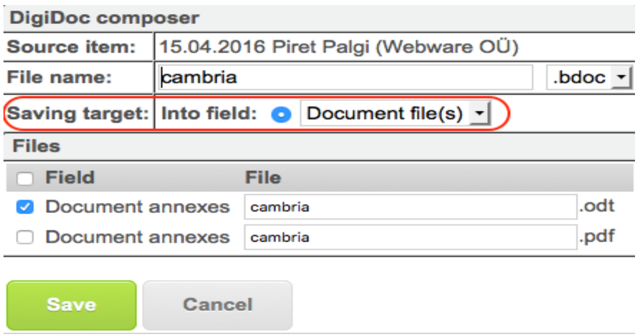


Warn if the user downloads a file on a locked entry
WEBDK_LOCKED_ITEM_FILE_DOWNLOAD_CONFIRM_ENABLED
If the entry (document) is locked by another user and you click on the file name, the respective message will be displayed.

Multiple user search based on the beginning
Upon selecting a user in a multiple user selection field, the given names are displayed first.
WEBDK_DYNAMIC_OBJECT_MUSEL_SEARCH_BY_START
true = users are displayed "given names + surname"; false = disabled.
Displaying a user in a multiple user search field: surname first
Upon selecting a user in a multiple user selection field, the surname is displayed first.
WEBDK_DYNAMIC_OBJECT_MUSEL_FAMILY_NAME_FIRST
true = users are displayed "surname + given names"; false = disabled, users are displayed "given names + surname".
Date of publication of dynamic object
WEBDK_PUBLIC_DYNOBJ_PUBLICH_DATE
The date as of which documents are displayed in the public module. Documents earlier than this date are not displayed in the public interface.
Save generated ddoc files only in the field
WEBDK_DYNOBJ_DDOC_DISABLE_RELATIONS_IF_FIELD_FOUND

If ticked, ddoc files are saved only in the data field and ddoc file generation is no longer offered in the connections.

See also "Data type management".



Minimum right to change the counter field manually
WEBDK_REGIDX_MANUAL_NUMBER_MIN_ACCESS
The minimum right with which it is possible to change the counter field manually. The rights of reading, writing and deletion can be set as the rights of the counter field.

Maximum file name length in the list view

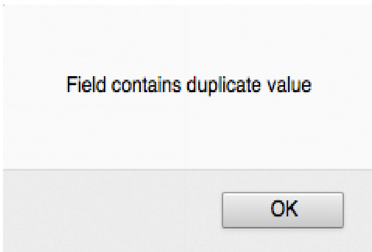
WEBDK_FILENAME_LISTING_LENGHT

In the list view you can set the maximum number of characters of a file name to be displayed.

Unique field warning enabled

WEBDK_DYNAMIC_OBJECT_UNIQUE_FIELD_WARN_ONLY

If the field is indicated as unique, you can adjust whether the data field is allowed to save with a repeat value. Uniqueness is used, for instance, in the register code field in the contact register in order to prevent the insertion of multiple contacts with the same registry code. For further information on uniqueness see the chapter on automatics.



Related entry restrictions are copied from the original

WEBDK_AUTOFILL_RELATED_PUBLIC_RESTRICTIONS

Upon registration of a related document (reply connection, related document), the access rights of the public register of documents set out in the Public Information Act are copied from the original entry. Thereby the restrictions of the pre-defined series are not used.

Defined location is required upon adding a new document

WEBDK_DYNOBJ_NO_LOCATIONS_ENABLED

If the given variable is enabled, you can register the document to the default directory, i.e. the directory opened in the structure tree. If the variable is not ticked, the objects (documents) can be registered only in the directories related to the data types.

Copy SOSEL values of the cross-table to the connections

WEBDK_CRSTBL_SOSEL_VALUES_TO_RELATIONS

In the cross-table in the SOSEL field, enable duplicate connections. If the selected object is in the cross-table column, the object is automatically also duplicated in connections.

Public URLs

REFERERS

The address of a website related to WebDesktop through which data is inserted into WD.
For further information on enabling the functionality of registration from the public web see here.
For further information on the functionality of registration from the public web, see the chapter “Registration from the public web”.

File field restrictions valid as of

WEBDK_PUBLIC_FIELD_TYPE_VALID_FROM_RESTRICTIONS

In the file field and in the multiple file field you can set the date as of which the files are restricted in the public document register.

Routing settings

Upon routing, choose e-mail by default

WEBDK_ROUTING_EMAIL_NOTIFICATION

Upon enabling the given variable, the message "By e-mail: now” is ticked by default, i.e. by default an e-mail notification is immediately sent to the person performing the routing task.

Ask for comments upon cancellation of routing

WEBDK_ROUTING_REQUIRE_COMMENT_ON_CANCEL

Comments are required upon declining routing.

Ask for comments upon giving feedback on routing

WEBDK_ROUTING_REQUIRE_COMMENT_ON_FEEDBACK

Comments are required upon giving feedback on routing.

Routing feedback disabled

WEBDK_ROUTING_DISABLE_FEEDBACK

If you tick the variable, the feedback button can be removed.

Mark routing as completed following signature

WEBDK_DYNOBJ_DDOC_ON_UPDATE_MARK_COMPLETED

If a signature is added to the file, the selected routing roles are marked as performed.

Pickup enabled

WEBDK_ROUTING_PICKUP_ENABLED

The pickup functionality allows for delegating a task for execution to multiple people and only one will execute it, i.e. the first one to pick the task.

Show selection on front page

WEBDK_DEFAULT_SHOW_ON_MY_FRONT_PAGE

Upon enabling the given variable, "Show on my front page" is ticked by default, i.e. the task initiated (routed) by me is shown by default on my front page.

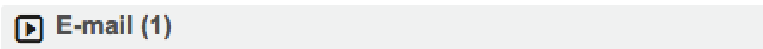
Default type

WEBDK_DEFAULT_ROUTING_TYPE

You can choose whether by default parallel routing or sequential routing is ticked upon adding routing.

'Show my routings' block is open

WEBDK_SHOW_MY_ROUTINGS_BY_DEFAULT



Routing block closed

The routing block can be adjusted to be open or closed by default.

Send e-mail notification if the status changes to the following

WEBDK_ROUTING_STATUS_CHANGE_NOTIFICATIONS

You can adjust in the case of which routing statuses a notification is sent. In the section, there are the following routing statuses: Done; Cancelled; Feedback; Pending; Viewed.

For further information on routing statuses see the Ordinary User Manual.

E-mail sender is an active user

WEBDK_ROUTING_FROM_CURRENT_USER

The address of the sender of a routing notification is the router's e-mail address. By default, the sender of the routing notification is WebDesktop.

Send e-mail upon cancellation

WEBDK_SEND_ROUTING_EMAIL_BY_UNCONFIRM

If routing is cancelled (by clicking on "Cancel" / "Decline", depending on the name of the button), WD will send an e-mail notice to the router.

Group selection enabled

WEBDK_ROUTING_GROUP_SELECTION_ENABLED

In routing, it is possible to enable or disable the routing of a document to a group.

Default types of continuous routing

WEBDK_CONTINUES_ROUTING_DEFAULT_TYPES

You can choose the document data type(s) in the case of which the default continuous routing is used.

Grant special right based on the role

WEBDK_EXTRA_RIGHTS_AUTO_ADD_RIGHT_BY_ROLE

You can adjust the routing roles and the special rights granted upon using them. E.g. if the document is routed to a user "For digital signature" and the user does not have the right to write via the group, the role "For digital signature" must be selected from the writing group.

Button names and statuses based on the role

WEBDK_ROUTING_ACTION_NAMES

You can adjust the titles of routing buttons and statuses displayed upon marking the routing task as completed. Adjustments can be made, depending on the language used in WD and on the routing role.

Settings related to rights

Group's special rights are activated

WEBDK_GROUP_EXTRA_RIGHTS_ENABLED

You can determine whether upon choosing the group in routing the automatic granting of special rights can be used.

Copy special rights upon duplication of the entry

WEBDK_COPY_EXTRA_RIGHTS_ON_DUPLICATION

You can determine whether upon duplication of the entry the special rights are copied from the duplicated entry.

Private directories enabled

WEBDK_PRIVATE_FOLDER_ENABLED

The application of a private directory can be considered, for instance, if the documents are located in a series that is either public or accessible to a larger number of users, but whereby exceptions should be made to single documents (mark the as private), so that they would be visible only to the person who moved the documents to the private directory or to a group holding the respective rights.

For further information on the functionality of a private director see the chapter "System of access rights".

Disable password login

WEBDK_DISABLE_LOGIN_BY_PASSWORD

Prohibiting login using a username and password.

Creator of a calendar even has the right to delete the event

WEBDK_CALENDAR_ENABLE_DELETE_BY_CREATOR

You can determine whether the person who added a calendar event has the right to delete the events added by them.

For further information on the calendar functionality see the Ordinary User Manual.

Minimum right to add

WEBDK_ROUTING_MIN_RIGHT_FOR_ADD

The minimum right with which a user can add new routing.

Minimum right to grant special rights

WEBDK_MIN_RIGHT_TO_GIVE_EXTRA_RIGHTS

The minimum right with which the user can grant special rights to an entry.

Grant special rights to the substitute

WEBDK_ADD_EXTRA_RIGHTS_TO_SUBSTITUTE

You can determine whether upon using substitutes the substitute is granted the required special rights to access a document.

Settings related to e-mail

Send error messages by e-mail

WEBDK_EMAIL_ERRMSG_ENABLED

Error messages displayed to users are sent by e-mail in WebDesktop.

Send error messages by e-mail from a public interface

WEBDK_ENABLE_EMAIL_ERRMSG_FROM_PUBLIC

Sending public user interface (e.g. published register of documents) error messages by e-mail.

Send information of slow queries by e-mail

WEBDK_EMAIL_SLOW_QUERY_ENABLED

Sending information of slow queries by e-mail.

E-mail signature enabled

WEBDK_EMAIL_SIGNATURE_ENABLED

Adding a signature to the end of the e-mail messages of all users of the desktop, i.e. in the entire desktop the same rule of generation of the signature is used.

The unit-based e-mail signature can be examined here.

For further information on using the e-mail signature functionality see the chapter "Signature".

Adding a structural unit to the e-mail signature

WEBDK_MAIL_SIGNATURE_DIVISION

Every structural unit can add a separate e-mail signature.

For further information on using the e-mail signature functionality see the chapter "Signature".

Squirrelmail enabled

WEBDK_SQUIRRELMAIL_ENABLED

Enabling the Squirrel Mail e-mail module.

Add mobile telephone number to the e-mail signature

WEBDK_MAIL_SIGNATURE_GSM

The possibility to add a mobile telephone number to the e-mail signature.

E-mail is sent from under an active user

WEBDK_EMAIL_PERSONAL_ADDRESS_ONLY

Upon sending an e-mail message, it is enabled to use only the e-mail address indicated in the user card as the sender's address.

Manner of sending e-mail by a substitute

WEBDK_SUBSTITUTION_EMAIL_SENDING_MODE

If you go on holiday or you are away from the office for another reason, you can appoint a person to whose front page document routing is executed. In the case of substitution, it is possible to adjust routing notifications to both persons (the one who is away and the substitute), only to the one who is away and only to the substitute.

For further information on substitution, see the Ordinary User Manual.

E-mail default subject profix

WEBDK_EMAIL_DEFAULT_SUBJECT_PREFIX

By default, [WebDesktop: type name] is added to the subject of e-mail messages. It can be changed and disabled.

Routing e-mail subject

WEBDK_EMAIL_ROUTING_SUBJECT_APPEARANCE

That is, the title of the routing e-mail notification. Possible to display the routing role (for approval, signature, etc.) and/or the dynamic name rule.

Calendar event e-mail subject

WEBDK_EMAIL_ROUTING_SUBJECT_APPEARANCE

Title of the e-mail notification of calendar events.

For further information on the calendar functionality, see the Ordinary User Manual.

DigiDoc service.

Digidoc service enabled

WEBDK_DIGIDOC_SERVICE_ENABLED

It is necessary for using server-based digital signature.

Disable login using Mobile ID

WEBDK_DISABLE_MOBID_LOGIN

Disables login using Mobile ID. However, digital signing using Mobile ID remains available.
On login using Mobile ID, see also the chapter "Login window".

Disable mobile-sensitive interface

WEBDK_DISABLE_MOBILE_DETECTION

Disables mobile-detecting interfaces. A mobile-detecting interface works only with Internet Explorer and runs once WD identifies a mobile-detecting device.