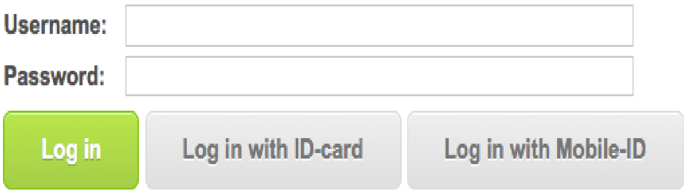
Ordinary User Manual

As an ordinary user, you can send documents inside and from outside the system, use calendars for time management, add tasks and adjust your front page, incl. desktop view.

Login

The electronic records management system (DHS) environment is located at ... You can log in to DHS using a username and password, ID card or Mobile ID. The username and password are issued by the desktop administrator of your organisation.



Please note: Do not disclose the username and password to anyone!

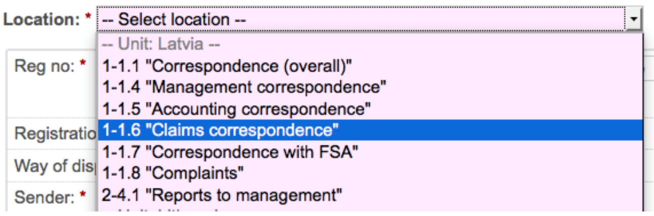
Everyday work in WebDesktop

Adding a document

There are various ways to add a new document (depends on the system settings).

Adding a document from the top menu "Add new"

1. Choose "Add new" from the top menu → respective document data type.
2. Fill in the data fields.
    - Choose the location or which series you wish to register the document. If it has been pre-selected, there is only one series in the selection.
    - Choose the registration number. If it has been pre-selected, there is only one counter in the selection (i.e. automatic issuer of a registration number).



3. If necessary, change the document's publication restrictions and add routing.
4. Click on the "Save" button.

Adding a document via connections

For what?

If you add a document via the connections block, there will be two-way connection between the existing document and the added document.

How to use?

1. Open a registered document to which you wish to add a new document in the connections.
2. There are two options in the system when it comes to adding a document via connections:
    - Scroll down to the block of the respective connection in the document view form and click on the "Add new" button.

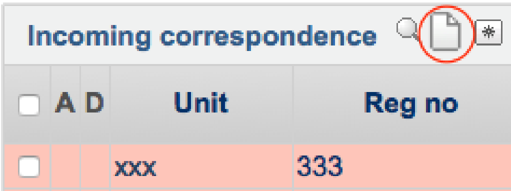
    - Add new documents via the connections list using the "Add new" button.

Adding a document in the list view via the “Add new” icon.

How to use?

1. Open the document list view. Choose “Management” → “Correspondence” → “Incoming document”.

2. If the administrator has permitted the addition of a new document from the list view, click on the “Add new” icon.



Creating a document for the print template

On the basis of the filled-in data card and using the print template you can create a formalised document.

1. To that end, open the registered document view form.
2. Scroll to the print block of the entry. The following options depend on the system settings.
    a. Choose the printing ground. For example, an outgoing document may offer such choices as "Outgoing initiating letter” and “Outgoing reply letter”.
    b. Choose the file format (.doc, .odt, etc.) in which the document is created.
    c. Choose the document’s target field where the document is saved in the data card. The most frequent options are “Document file”, “Signed file”, etc.

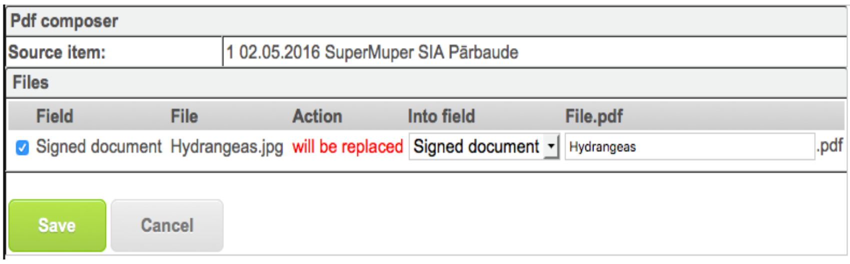
3. Click on “Create file” if you wish to simply create a document based on a data card.
4. Click on “Create file and sign” if you wish to create the document and sign it at once.

Converting a document into pdf

> You can only convert documents that are in .odt or .doc format. The conversion of a .doc document into pdf may render an end result with distorted formatting. Reason: WD uses the Open Officer converter for converting files.

1. Click on the pdf icon after the file in the file field.

2. The pdf creation window will open. If you wish, change the target field (e.g. instead of the draft field of the document, choose the signed file field) and/or change the document file name converted into the pdf format.



3. Save the result. The file is converted into the pdf format.

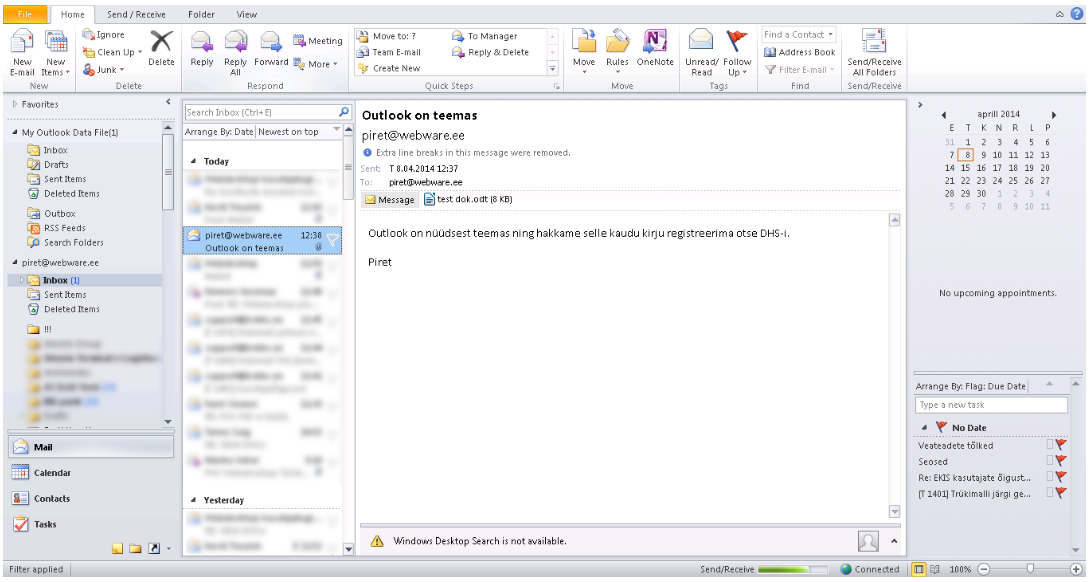
Registration of a document in Outlook

In order to register letters right in Outlook, you need to install the respective plugin in your computer. You will find the installation information at http://www.webware.ee/et/outlook-plugin.

The WebDesktop URL must be written correctly in the settings window. An error may be given by an excessive character (incl. a space) or a missing colon or dash.

Registration of an initiating letter (incoming document)

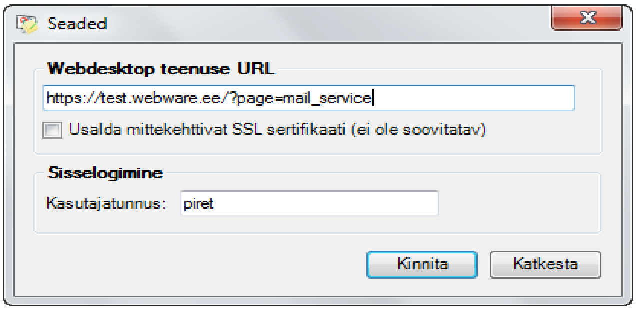
1. After logging in to Outlook, you will see the contents of your mailbox. Double click to open the e-mail message that you wish to register in DHS via Outlook.



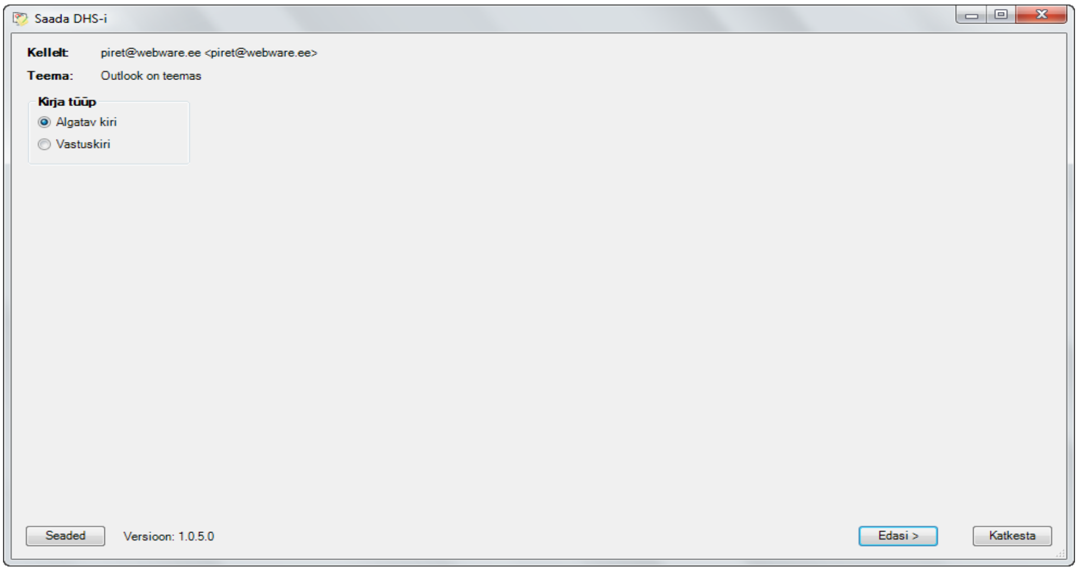
2. The message opens in a new window. Click on the “Send to DHS” button in the right corner.
3. Upon the first click on the “Send to DHS” button, the window “Settings” opens.
   a. Enter the WebDesktop service URL in the following form: **https://webdesktopiaadress/?page=mail_service**

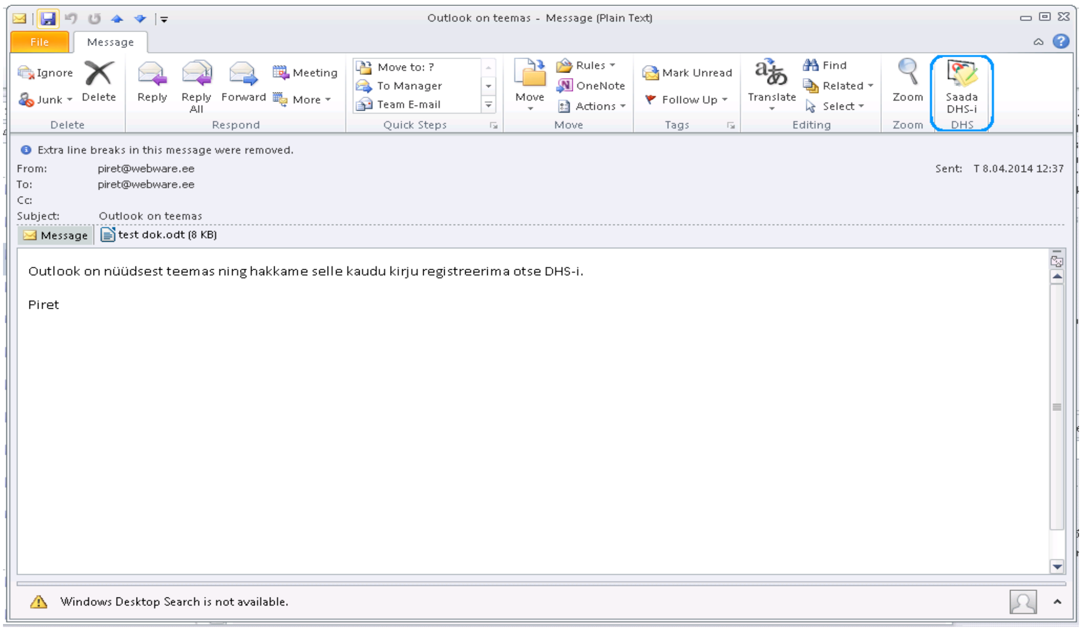
For example, https://test.webware.ee/?page=mail_service

b. Tick the row "Trust invalid SSL certificate".
c. Enter your WebDesktop username.
d. Click "Confirm”.



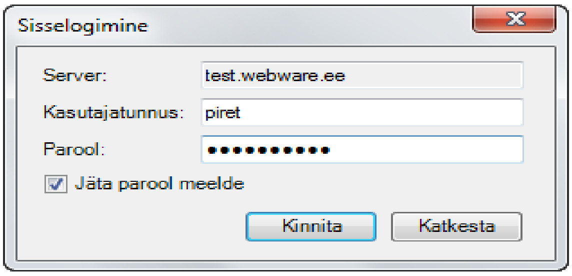
4. In the new window, information on the sender’s e-mail address and subject is displayed.
   a. Choose the “Letter type” from the selection “Initiating letter” or “Reply letter".



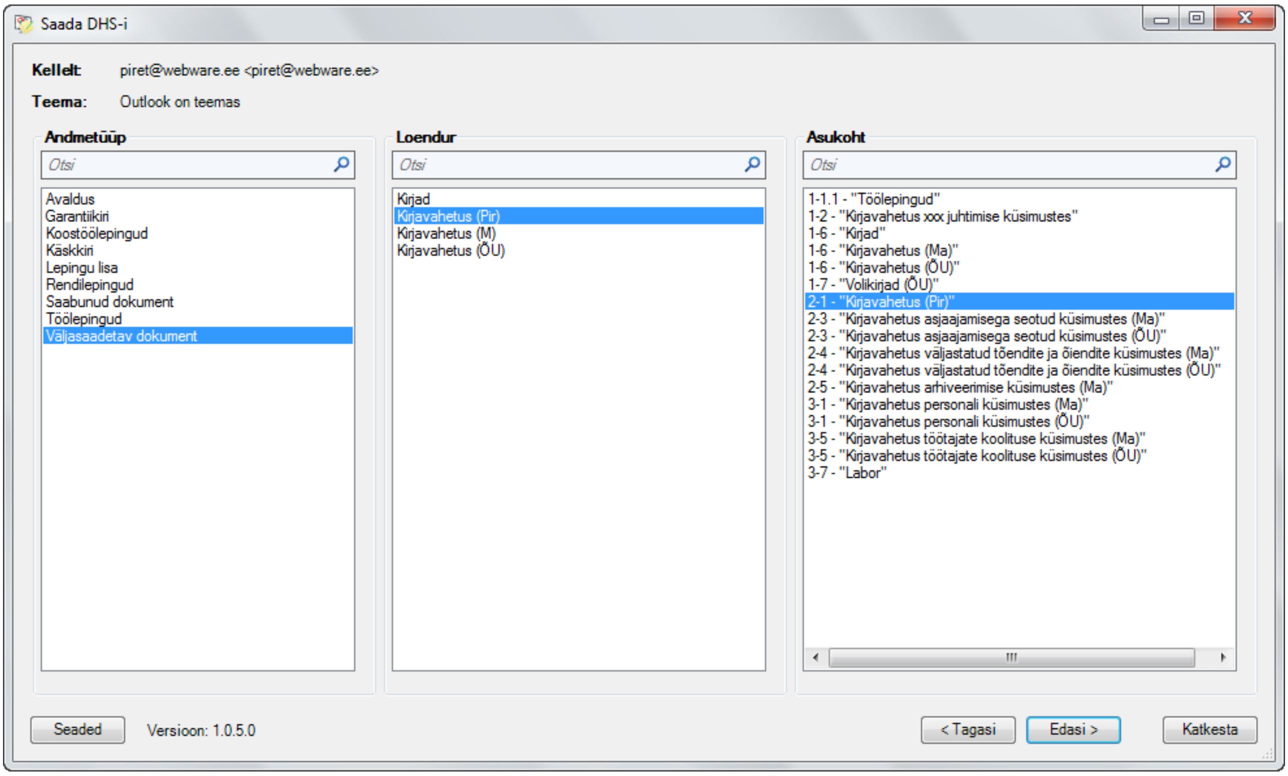


   b. Click on the “Next” button.

c. If you click on the “Cancel” button, the “Send to DHS” window will be closed and the sending of the document to DHS is aborted.

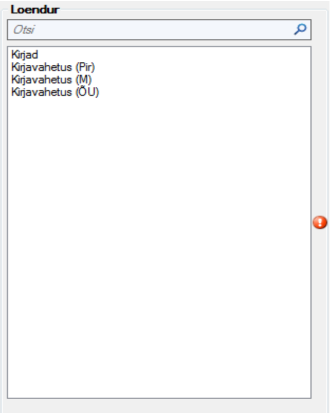


5. If you have not promised to remember the Outlook password, the window "Login" may be opened. You need to enter your password there and, if you want, tick the row "Remember password". Confirm the changes.
6. In the window “Send to DHS”, choose “Data type”, “Counter” and “Location”.
   a. If in the “Data type” selection cell there is only one option, it is selected automatically (pre-defined by the administrator). If there are many options, you can choose the suitable data type for registering the incoming document from among them. In the case of multiple options, you can find the suitable counter.
   b. After you have selected the data type, you will be offered respective counters and the right locations (series). If there is one choice in the counter cell, it is chosen automatically. If there are many choices, you should enter the word based on which to search for the counter.
   c. Choose the location of the series where to register the incoming document.

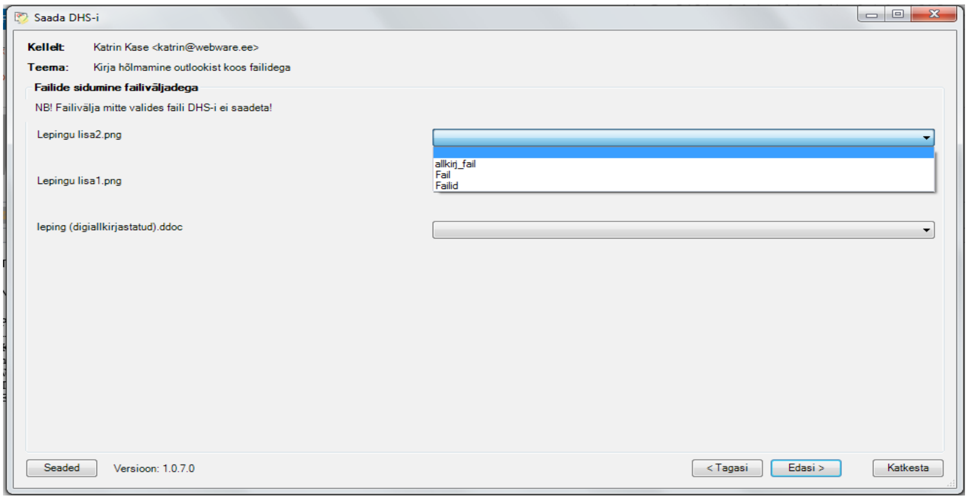


7. Click on “Next”.
   a. If you click on "<Back", you will be taken back to the "Send to DHS" window where you need to choose "Initiating letter" or "Reply letter" again.
   b. If you click on the “Cancel” button, the “Send to DHS” window will be closed and the sending of the document to DHS is aborted.

c. If no selection between “Counter” or “Location” has been made from among the options of “Send to DHS”, a warning will be displayed with a red question mark next to the selection cell where no selection has been made.

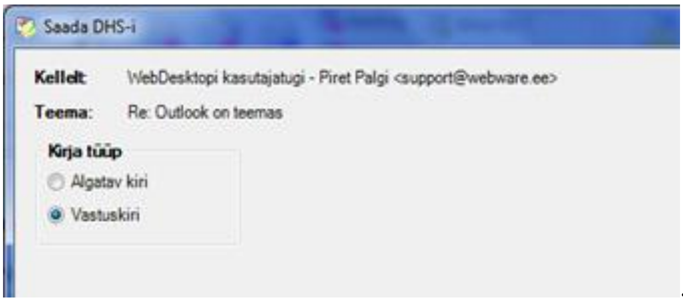


8. The **“Bind files to file fields”** window will open if the letter has attachments. **Please note: If the file field is pre-selected by default, the default value must be set to the file field.** See the Administrator Manual “15. Files from message attachment in Outlook”. The drop-down menu displays the names of all fields where files can be saved. In the case of each file the file field must be chosen separately. If file locations have been chosen, click on the "Next" → button.
   a. If you click on the “<Back” button, you will be taken back to the previous window where you need to make a choice from among such options as “Data type”, “Counter” and “Location”.
   b. If you click on the “Cancel” button, the “Send to DHS” window will be closed and the sending of the document to DHS is aborted.
   c. If the location of the file is not determined (no choice is made in the drop-down menu), the file will not be registered together with the letter.
9. In the case of the successful sending of a document, a notice and a link will be displayed. If you click on the link, you will be taken to the records management system’s login window (if you are not logged in to the system) or to the registered entry (if you are logged in to the system).



Registration of a reply letter (outgoing letter)

1. In order to register a reply letter, open the incoming letter and click on the “Send to DHS” button in the opened letter window.
2. In the opened window, select letter type “Reply letter” and click “Next”



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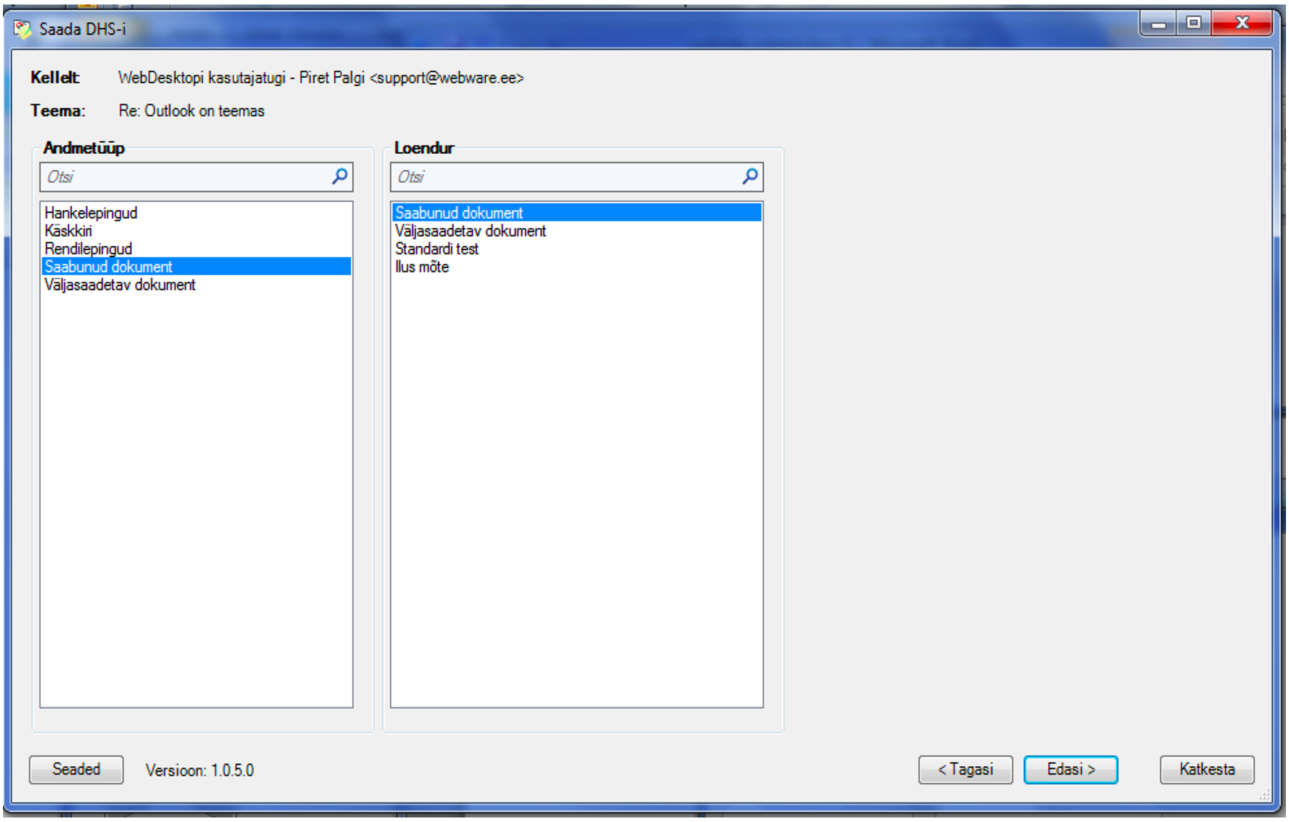
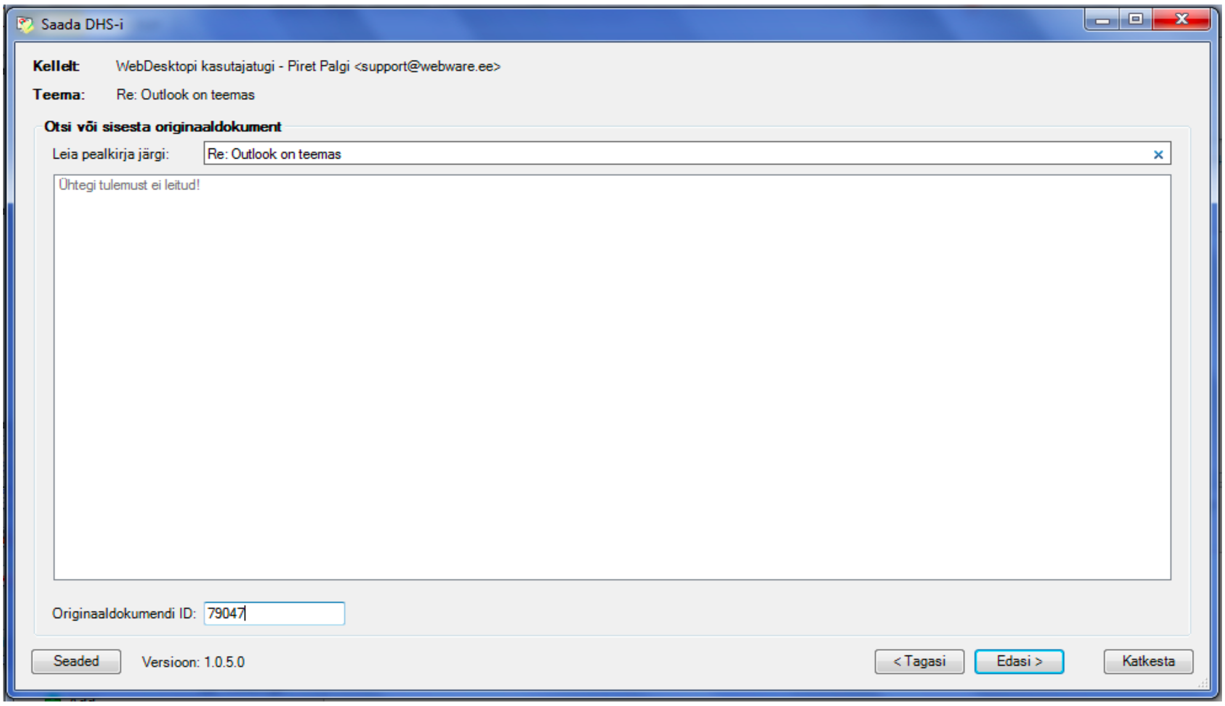
3. Choose the data type (the one to which the reply is registered) and the counter. Click on the "Next" button.



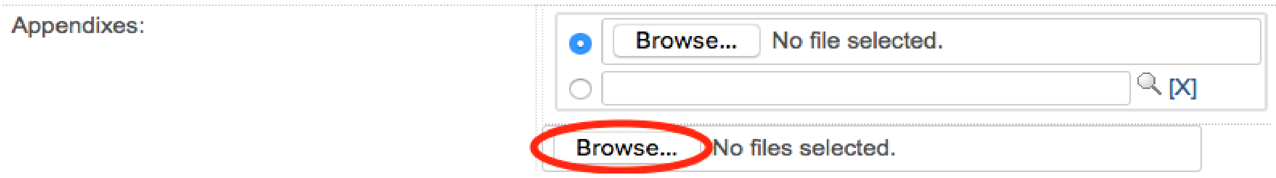
4. In the opened window, take the following steps:
    a. If you want, find the previous letter from the cell "Find by title". A reply is registered to the letter.
    b. If the letter cannot be found based on the title, you can use the ID. To that end, insert the ID in the "ID of original document" cell.

c. Click on the “Next” button.



5. In the case of the successful sending of a document, a notice and a link will be displayed. If you click on the link, you will be taken to the records management system’s login window (if you are not logged in to the system) or to the registered entry (if you are logged in to the system).

Uploading multiple files at once

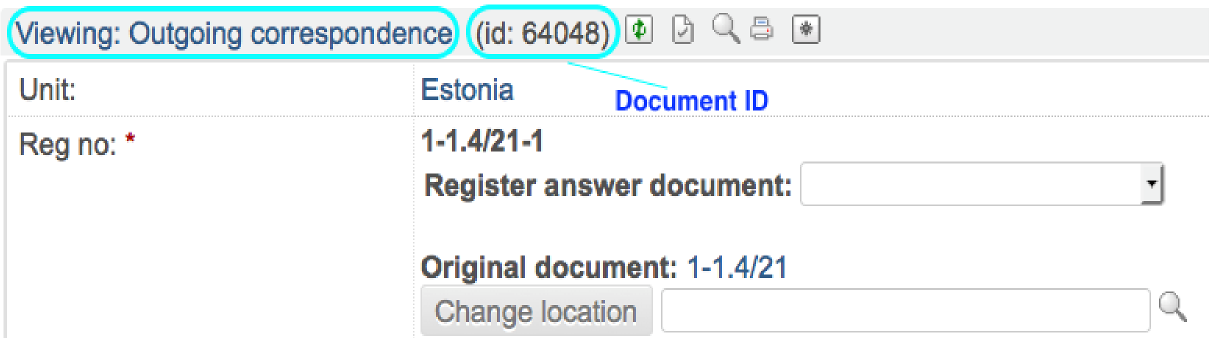


1. You can upload the desired files to the multiple files field at once. To that end, click on the **“Choose files”/”Browse”** button.
2. The folder from where you can choose the files to upload will be opened in your computer.
3. Choose **“Open”**.
4. The file field shows information on the number of selected files.

Viewing a document (incl. the “Management” menu)

1. The document meta data view (list view) is shown if you choose "Management" the desired → document data type. Next, the document list view is opened to you.

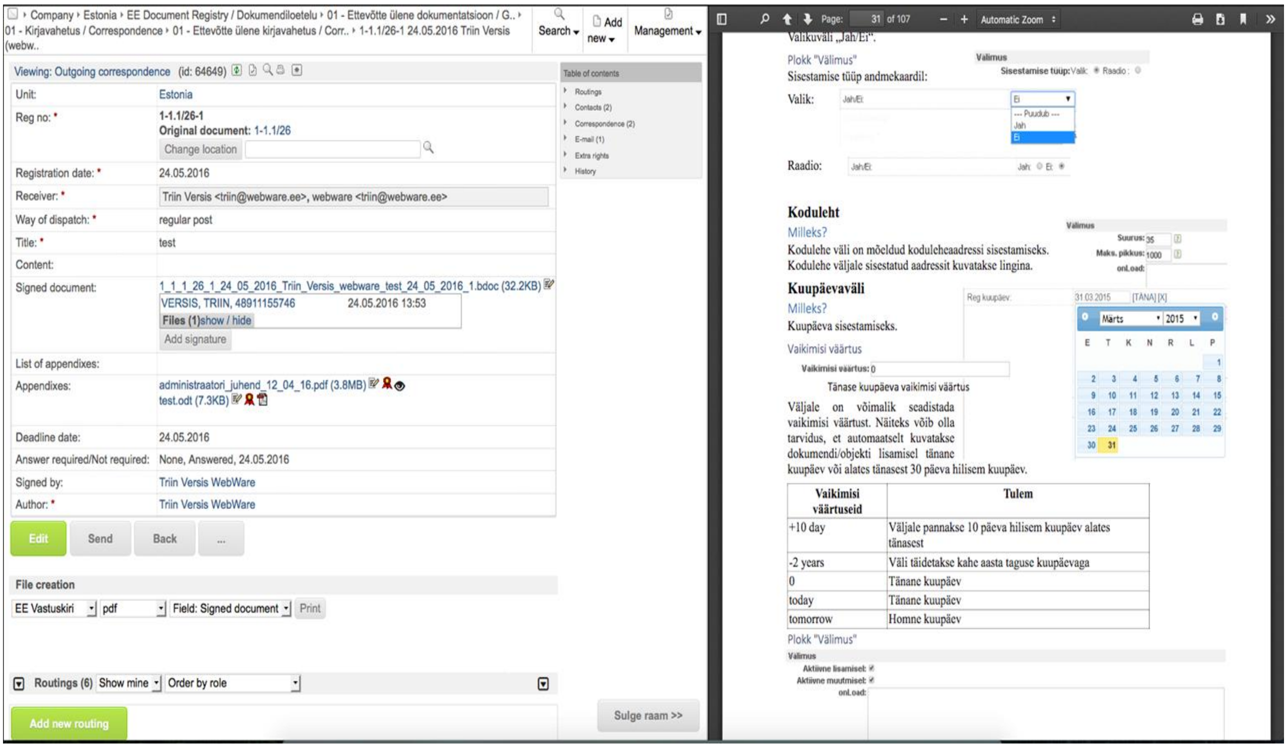
2. If you click on the title of a document, the document view form will be opened.



- Using the document ID you can search for documents in the search window. For further information on the search window, see here.

File preview

Due to the need to see the preview of the invoice file next to a purchase invoice, WD allows for opening the pdf preview on the **single file field** without loading the file onto the user's computer. You



can open the preview by clicking on the eye icon in the file field. The file preview opens in a separate frame and you can browse through the entire file. The text can be copied from the file preview.

> The file preview must be enabled from the configuration file. This is performed by WD user support. The file preview is missing in the field of multiple files.

Changing the location of a document/object

The location of a document / object (folder, function, series, etc.) can be changed. Thereby the data type of the document does not change.

Changing the location of a document

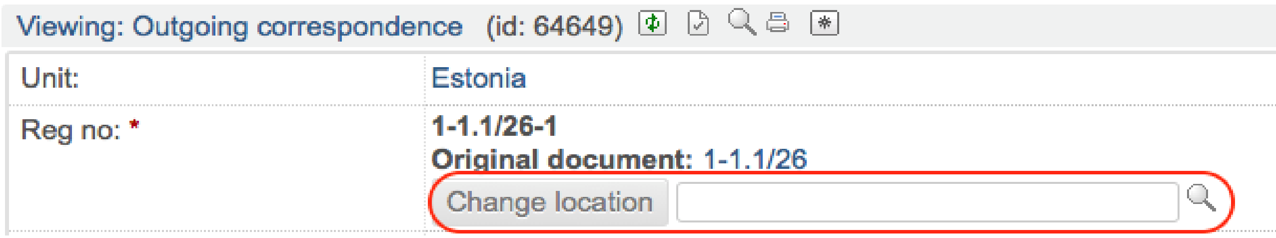
There are two options for changing the location of a document:

- from the document view form using the **“Change location”** button;
- relocate the document by using the **“Cut selected”** and **“Paste”** buttons in the view opened from the structure tree.

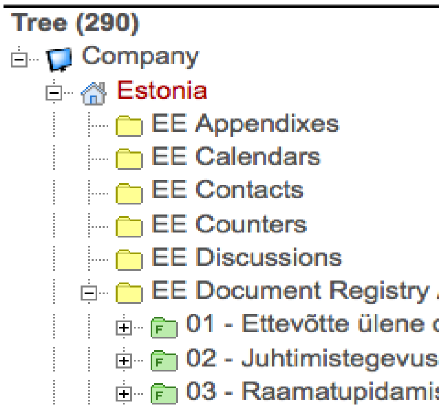
Changing the location of a document using the “Change location” button

It is practical to use the **“Change location”** button if the location of one document or a few documents needs to be changed.

1. Click on the magnifying glass icon in the registration number row.



2. The tree opens in a popup window. Scroll the tree open by clicking on plus signs and if you are at the desired level in the tree, click on the name.

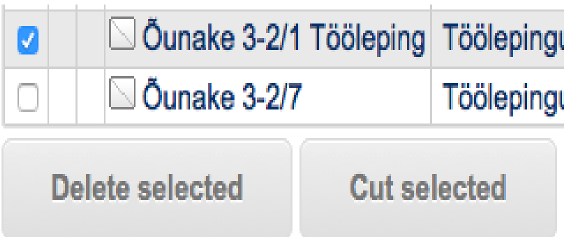


3. Thereafter the popup window will close and the location field is filled in the document view form.
4. Click on the “Change location” button. Location changes leave a trace in the history of changes of the document.

Cut-and-paste of a document / object

1. Open the structure tree 

.
2. Put a tick before the document / object that you wish to relocate. Click on the **“Cut selected”** button. The **“Paste”** button will emerge automatically.
3. In the structure tree, move to the catalogue where you wish to put the document and click on the “Paste" button.



Changing a document

Changing a registered document

1. Open the document.

2. Click on the **“Edit”** button.

Changing the document file using the direct editing functionality

For what?

With the help of direct editing (hereinafter OR) you can change the content of the files contained in WebDesktop and save the changed file back to WebDesktop (WebDesktop preserves all the versions of changed files).

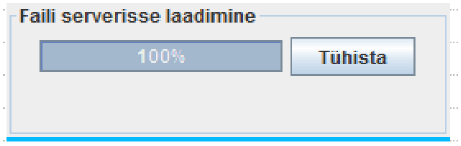
> To use OR you need to configure the computer once, i.e. install Java Runtime Environment. If necessary, contact your IT specialist. For further information on the technical nuances of OR, see here.

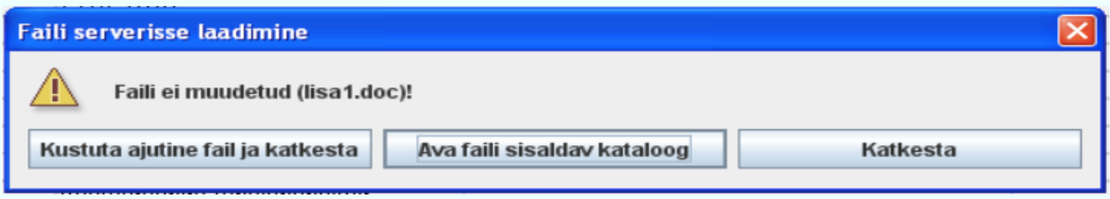
How to use?

1. Fund a file or entry whose file you wish to change.
2. In the meta data card, click on the change icon **"Change or open for changing"** in the file field.

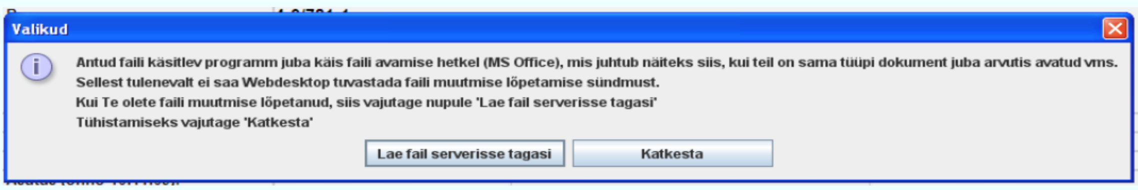
3. OR automatically loads the file in your computer and opens it in the software installed on the computer. Upon first editing, WD asks to run Java. Choose “Run” and have the browser remember the action.

4. The document is opened in the word processing program. Make the desired changes, save the result and close the word processing program. The edited file is loaded back into the server and the document form is refreshed.





If you do not make any changes to the document, the window where you need to make a choice will be displayed so that the same document can still be opened from the computer in the future and it will not remain locked.



If software that is able to process the respective document already runs in the computer, you will get a warning with options whereby you must make a choice.

Searching for a document

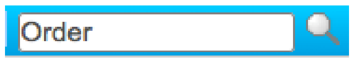
Search window

For what?

With the help of the **search window** or **global search** you can make a search within the limits of the system's access rights.

How to use?

1. Enter the search word in the search window and click on the magnifying glass located right of the search window.



   - If you wish to send anyone a direct reference to a document, it is practical to use the document ID for that purpose, which you will find in the document view and change form. For instance, if the document ID is **67442**, you should insert **#67442** in the search window. For further information on document ID see here. For further information on document ID see here.

2. The list view displays search results that you are entitled to access.

Global search ; Filters [Clear]: *Archive state: ALL, Name (contains): 'Order'* [Clear]

	Name	Type name	Creator	Create time	Last modified	* Actions
	.					
	..					
	TDY Order Ants Kaval	TDY Order	Riina Raju	18.12.2015 10:05	21.04.2016 09:11	
	TDY Order Ants Kaval	TDY Order	Riina Raju	10.09.2015 10:41	02.03.2016 21:24	
	TDY Order Aprilli Test	TDY Order	Riina Raju	13.04.2016 13:36	13.04.2016 13:36	
	TDY Order Aprilli Test	TDY Order	Riina Raju	13.04.2016 13:20	13.04.2016 13:20	

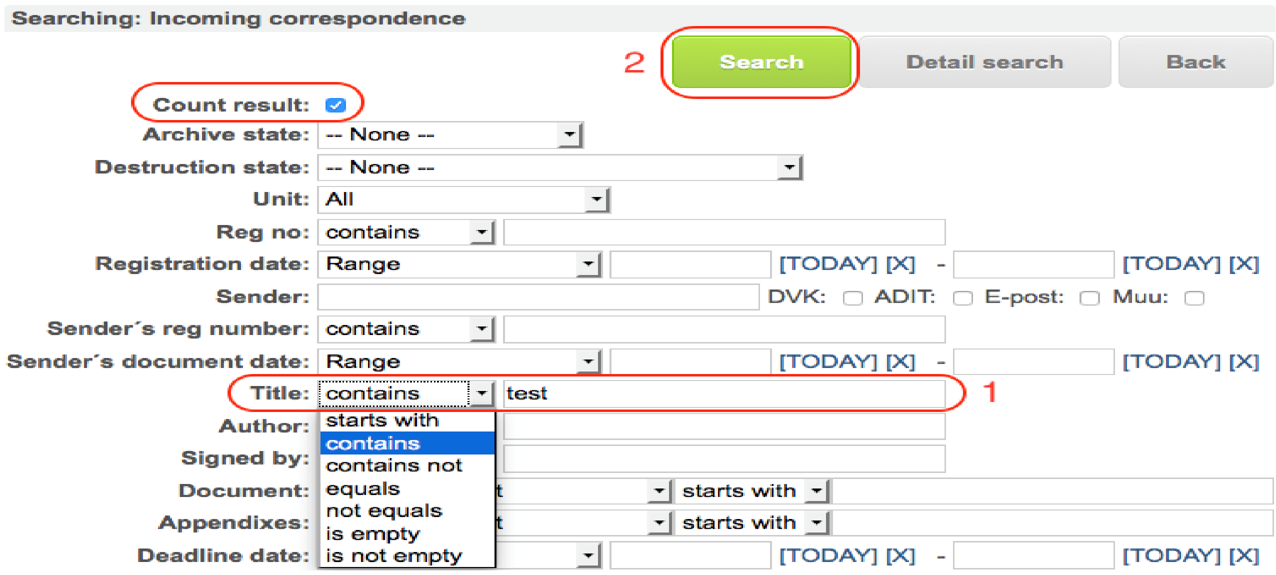
“Search” menu

For what?

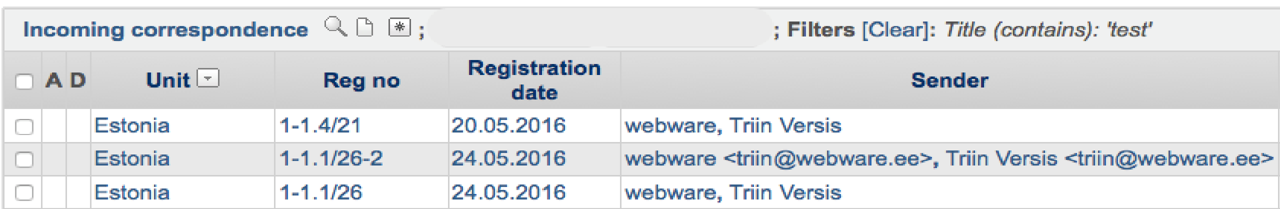
With the help of the “Search” menu you can search for a document using meta data fields. To that end you must certainly know whether it was an incoming document or, for instance, a general directive. If the document type is unknown, you should use a search window or object search. On the detailed search form you can search for information in connection with routing, locking, publication restrictions and connected documents.

How to use?

1. Choose the “Search” menu → click on the data type of the respective document.
2. A simple search form will be opened. The composition of the data fields depends on the administrator’s settings. If possible, you can eliminate excessive fields and, where necessary, also add fields if the respective data field exists in the document registration form. For further information, see also "Detailed search".



3. Fill in the desired search fields. The filters in front of the search fields also provide an additional chance to tell the system whether the search result must contain the word "test" or must start with the word "test".
4. If you wish to count search results, tick in "Count results".
5. If the search fields are filled in, click on "Search".
6. The search results will be displayed in the list view. The search result will be displayed above the header of the table (Found: x) and the search filters will be shown.

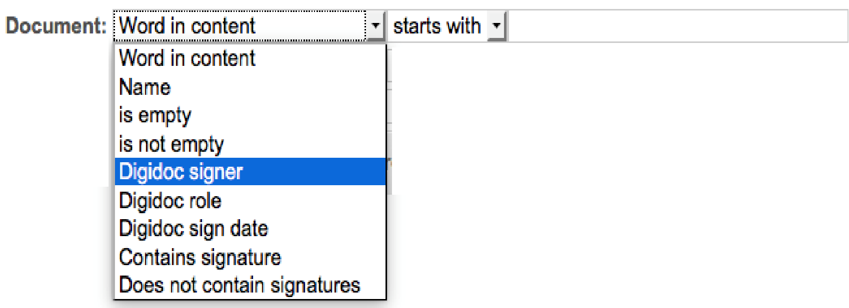


Incoming correspondence ; ; Filters [Clear]: *Title (contains): 'test'*

A	D	Unit	Reg no	Registration date	Sender
		Estonia	1-1.4/21	20.05.2016	webware, Triin Versis
		Estonia	1-1.1/26-2	24.05.2016	webware <triin@webware.ee>, Triin Versis <triin@webware.ee>
		Estonia	1-1.1/26	24.05.2016	webware, Triin Versis

Options of searching by file

The options for searching for a document file are as follows:



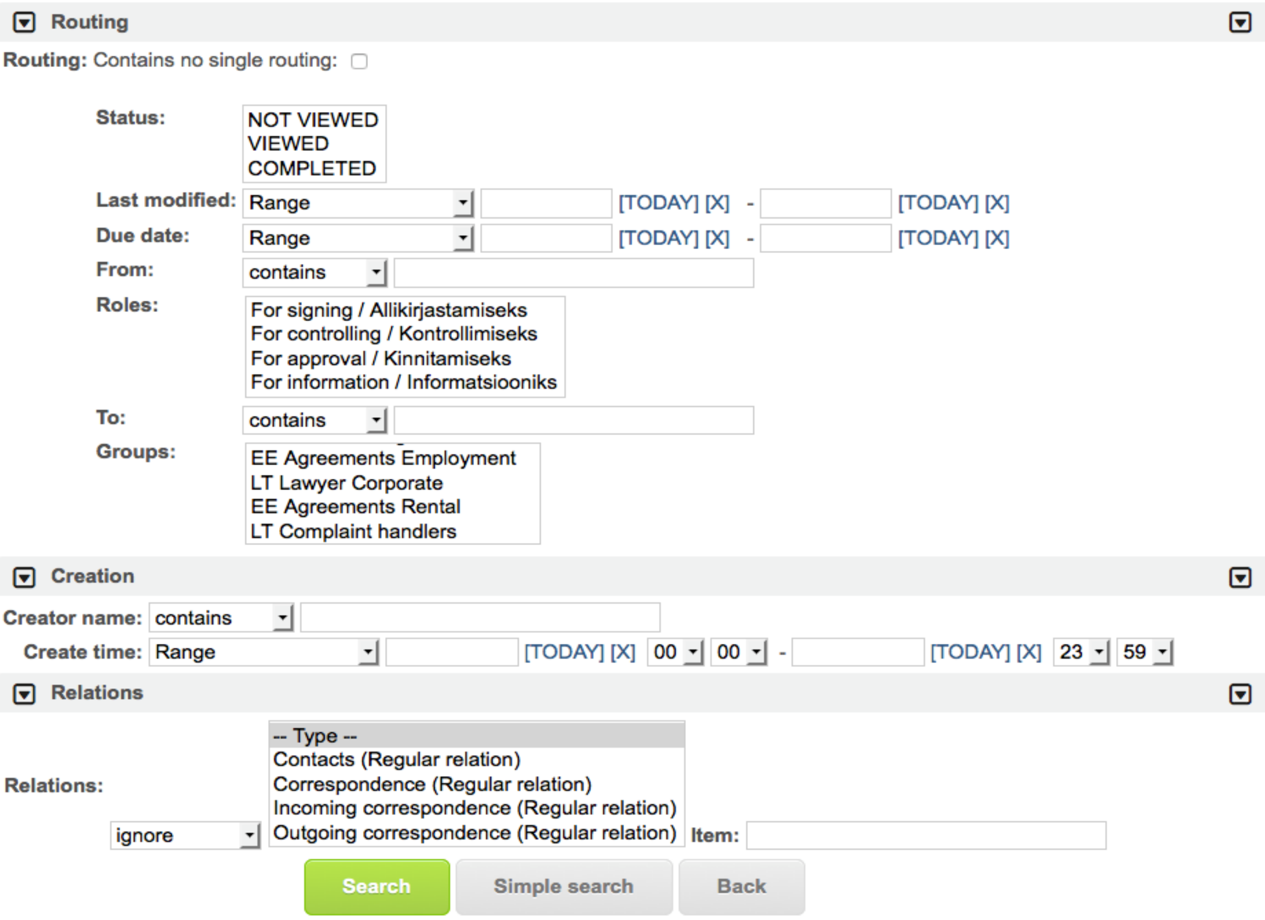
- Word in the contents - a match to an inserted word is searched for in the contents of a file;
- Name – entries are searched for by the title of the file;
- empty – entries whose file field is empty are searched for;
- not empty – entries whose file field is not empty are searched for;
- DigiDoc signatory – search by DDOC signatory;
- DigiDoc role – search by DDOC signing role (resolution);
- DigiDoc signature date - search by date of signing DDOC;
- Contains signature – search for digitally signed file entries that contain the desired number of signatures;

- no signature - search for entries where files do not have any signature.

For what and how to use the detailed search?

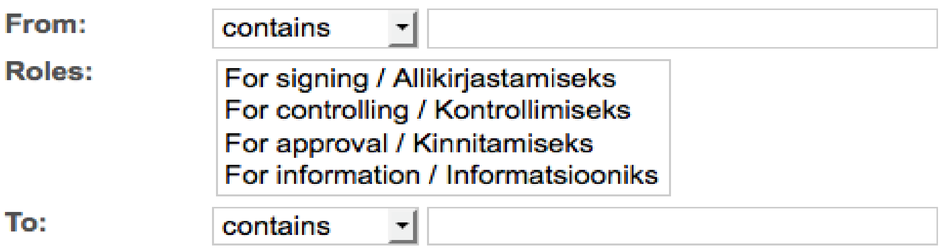
In the detailed search window you will find search opportunities within the limits of various WD functionalities, e.g. routing, locking, publishing, etc.

1. Choose the “Search” menu → click on the data type of the respective document.
2. A simple search form will be opened by default. To open the detailed search form, click on the “Detailed search” button in the upper or lower part of the search window.



Routing block: “From” field

In the detailed search form in the routing block you can also search using the “From” field in addition to the “To” field.



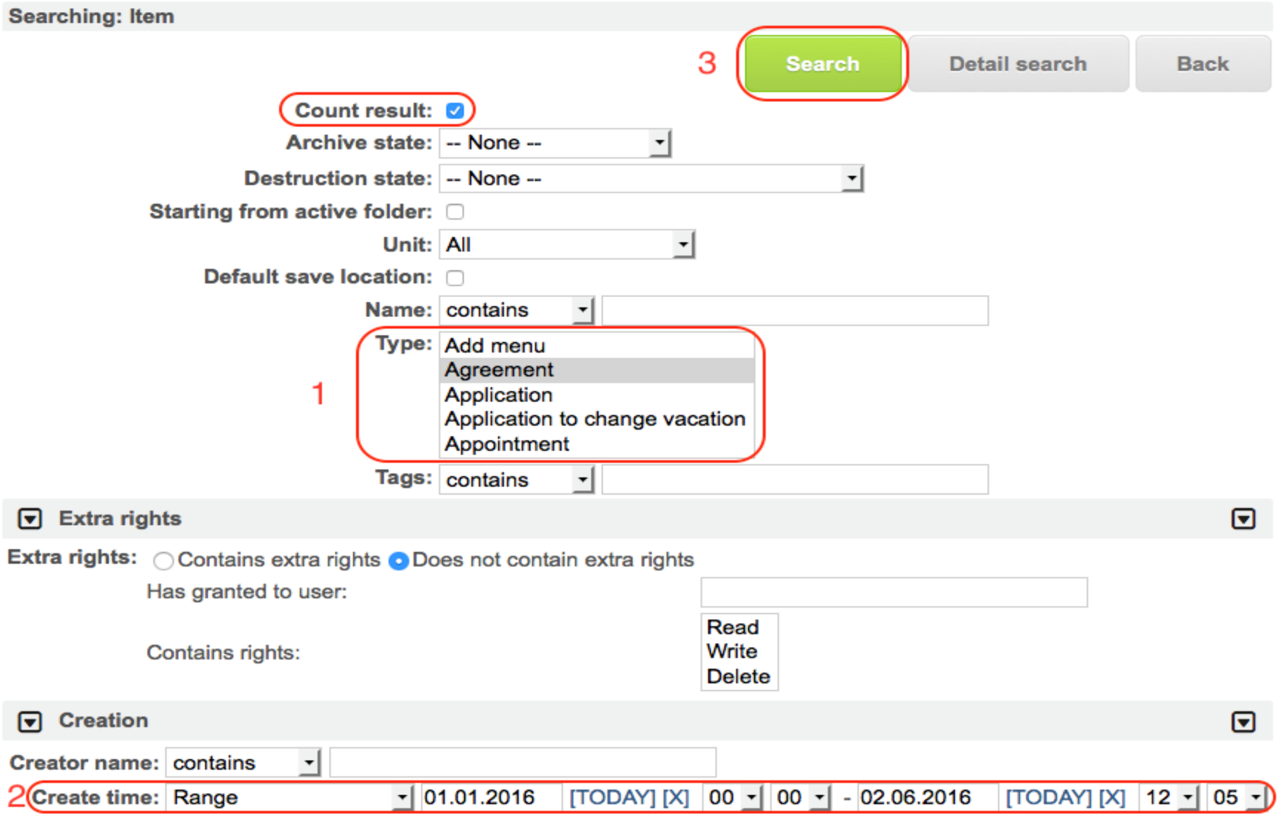
Object search

For what?

If it is not known under which document data type a document has been registered or if the quantity of various registered documents is to be established over a certain period of time, the object search should be used. On the object search page there is a keyword search cell. If the organisation has introduced document keywords, you can also search for documents based on keywords.

How to use?

1. Choose “Search” → “Object”.
2. The object search page opens.

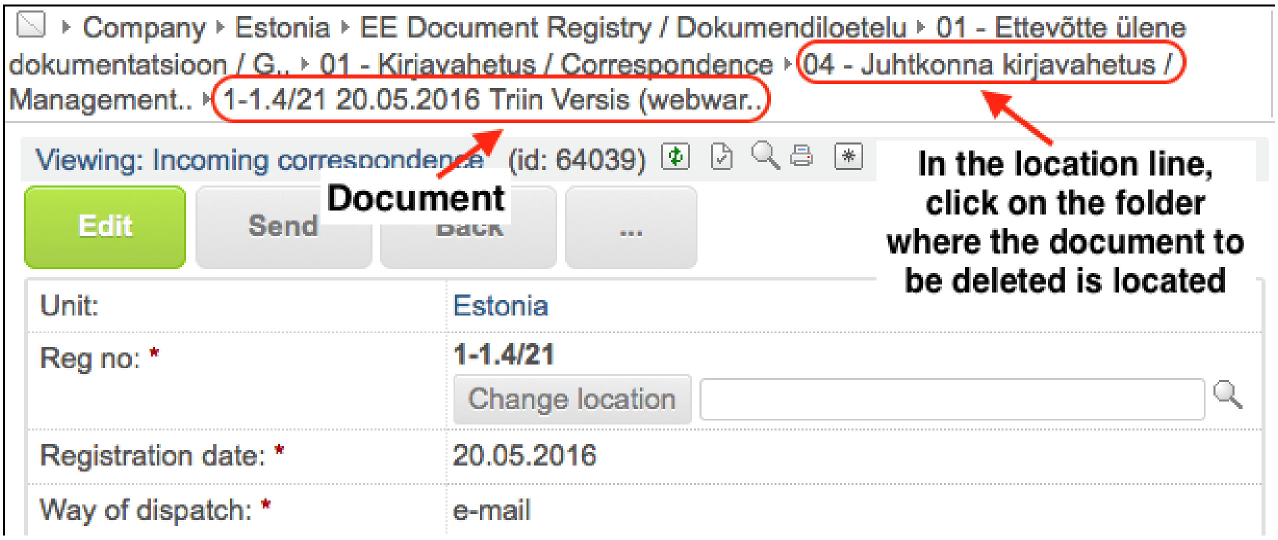


3. Fill in the desired data fields and click on the “Search” button.

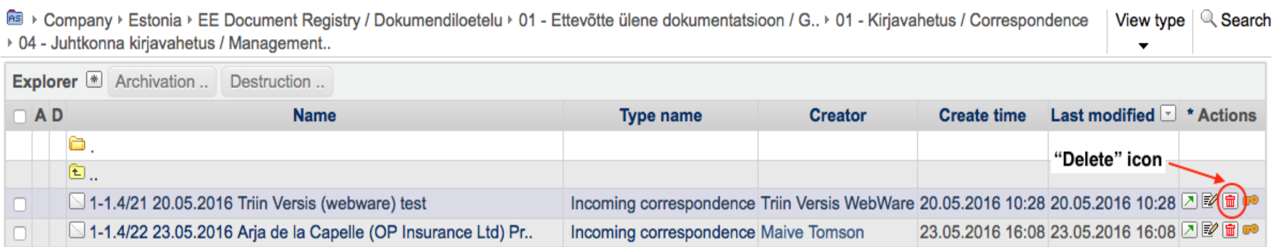
Deletion of a document

Deleting using the recycle bin icon

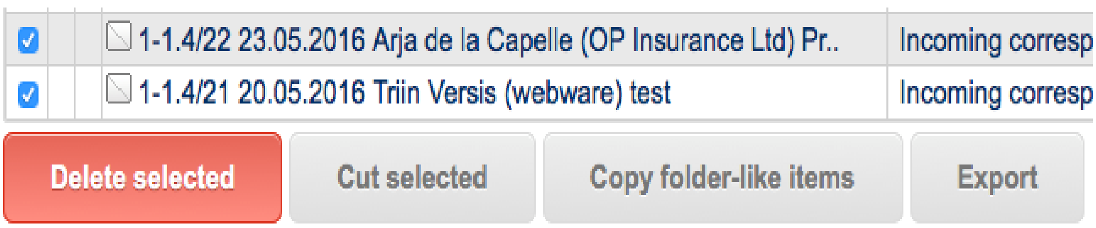
1. Open the document that you wish to delete.
2. In the location line, click on the folder where the document to be deleted is located.



3. The folder (series) list view opens. There are two options for deleting:
   a. Find the document to be deleted and click on the “Delete” icon in the actions column.



   b. Tick the document(s) to be deleted and click on the "Delete selected" button at the bottom of the list view.



Relation

For what?

Relations allow for binding documents/objects, as result of which a case-based dossier can be created. A few examples of case-based dossiers:

- correspondence on a certain topic where the initiating letter is related to a reply letter;
- a contract along with correspondence certifying the process of conclusion of the contract;
- a decision of the management board and drafts of a decision of the management board.

It is common practice to relate, for instance, the register of contacts to documents.

How to use?

1. Open the document that you wish to relate to another registered document.
2. Scroll to the block of the respective relation and if it is not open, click on the down-pointing arrow .
3. Click on the "Add relations" button.

4. The document list view opens. Tick the document that you wish to relate. Click on the “Relate selected” button.

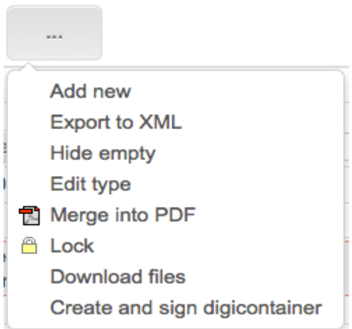
   - If the list view is long and you cannot see the document that you are looking for, use the search icon. If you have found the document using the search card, click on the “Relate selected” button.

Locking a document

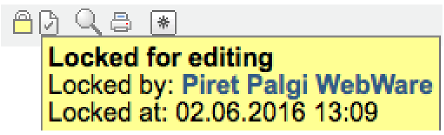
For what?

In order to prevent unauthorised changes, documents can be locked. A locked document cannot be changed (i.e. the “Change” and “Add new” buttons are not displayed to the user). All users have the right to lock. The user has the right to unlock the documents that the user has locked. The desktop administrator, unit administrator and users belonging to the unlocking group have the right to unlock any document.

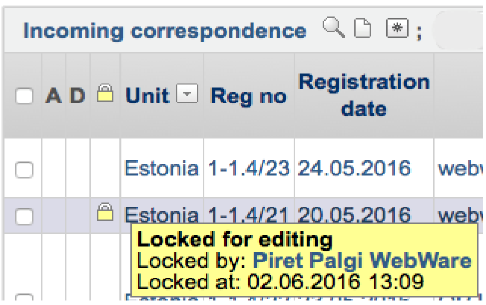
How to use?



1. To lock an entry, click on the **“Lock”** button.
2. Once the entry is locked, the following information will be displayed to other system users:
   - in the entry view form



   - and, if the respective settings have been made, also in the list view.

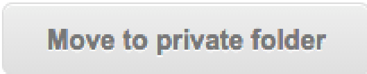


Moving a document to a private folder

For what?

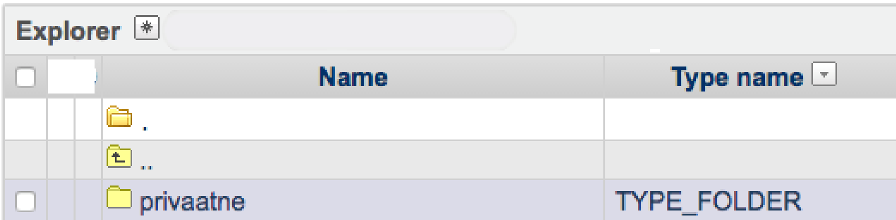
The document can be moved to a private folder, which means that the document will remain in the same series, but it can be accessed only by the person who moved the document to the private folder. You can only move a document that you created to a private folder. The desktop administrator can move any document created by users to a private folder.

How to use?



1. To move a document to a private folder, click on the button. **PLEASE NOTE: Only the creator of the document sees the button.**
2. The following message is displayed:

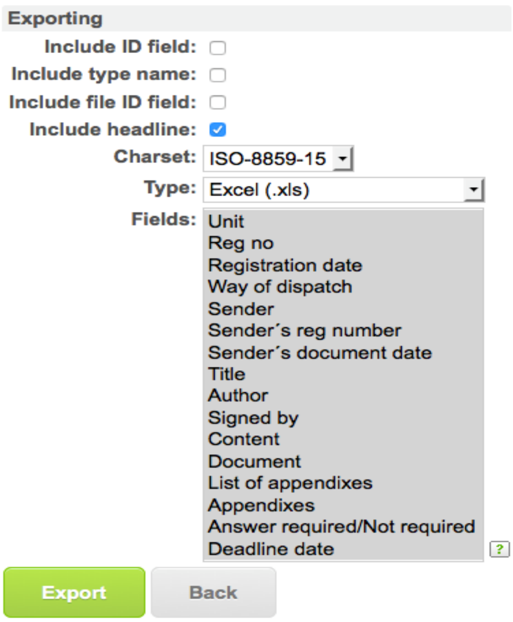
3. In the document structure tree, the folder "private" appears (depending on the system settings) and the document is moved there.



Data export

1. To export data, open the (sub)type list view in the management menu.
   a. Let us suppose that you wish to export correspondence. For that purpose, you can filter out correspondence that took place within a certain period.
   b. The other option is to open correspondence from the management menu.
2. Click on the **"Export"** button.
3. The export window opens. Make the required selections there.
   a. Add ID field – the document/object ID is added to an Excel table.
   b. Add title – column titles are added to an Excel table (field export name).
   c. Format – text coding options.
   - UTF8 - for Cyrillic letters.
   - ISO-8850-15 – for older Excel versions and Estonian characters.

   d. Type
   - Excel (.xls) – an Excel file is made.
   - Separated by a tab (.txt) – a CSV-like file separated by tabs (tabulators) is made.
   - Separated by a comma (.csv) – a CSV file (values separated by commas) is made.
   - Separated by a semi-colon (.csv) – a CSV file (values separated by semi-colons) is made.



e. Fields – fields enter to an Excel table. By default, all fields are selected. To choose multiple fields, hold down the Ctrl button.

4. If the choices have been made, click on the “Export” button.

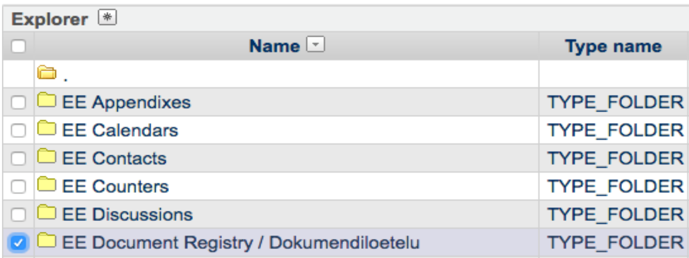
Exporting a tree

The structure tree can be exported as a whole to a spreadsheet file in xlx format. Administrators can export the structure tree of only one unit at a time.

Upon exporting the tree, the following data is gathered into a single file:

- **type** – desktop, unit, folder, function, series, etc.;
- **marking** – the index of the classification unit, e.g. 1 in the case of a function, 1-2 in the case of a series;
- **name;**
- **index** – the number of the folder, e.g. 01;
- **archive value** – for further information on the archive value term see ...;
- **preservation timetable** - for further information on preservation see...;
- **restriction** – by default, an access restriction has been imposed on the folder;
- **restriction valid until** – by default, an access restriction has been imposed on the folder;
- **ground for restriction** – by default, an access restriction has been imposed on the folder;
- **document types** – data types to which the folder is connected;
- **special right to adder of document** – special rights set to the folder, which are granted to the person who added the entry;
- **preview right** – groups that have preview rights to entries contained in a folder;
- **reading right** – groups that have reading rights regarding entries contained in a folder;
- **writing right** – groups that have writing rights regarding entries contained in a folder;
- **deletion right** – groups that have deletion rights regarding entries contained in a folder.

1. To export a tree, tick the tree level as of which the export is commenced. For example, it may be necessary to get a more detailed overview of the list of documents.
2. Click on the **“Export”** button.



3. An xls file is uploaded to the computer.

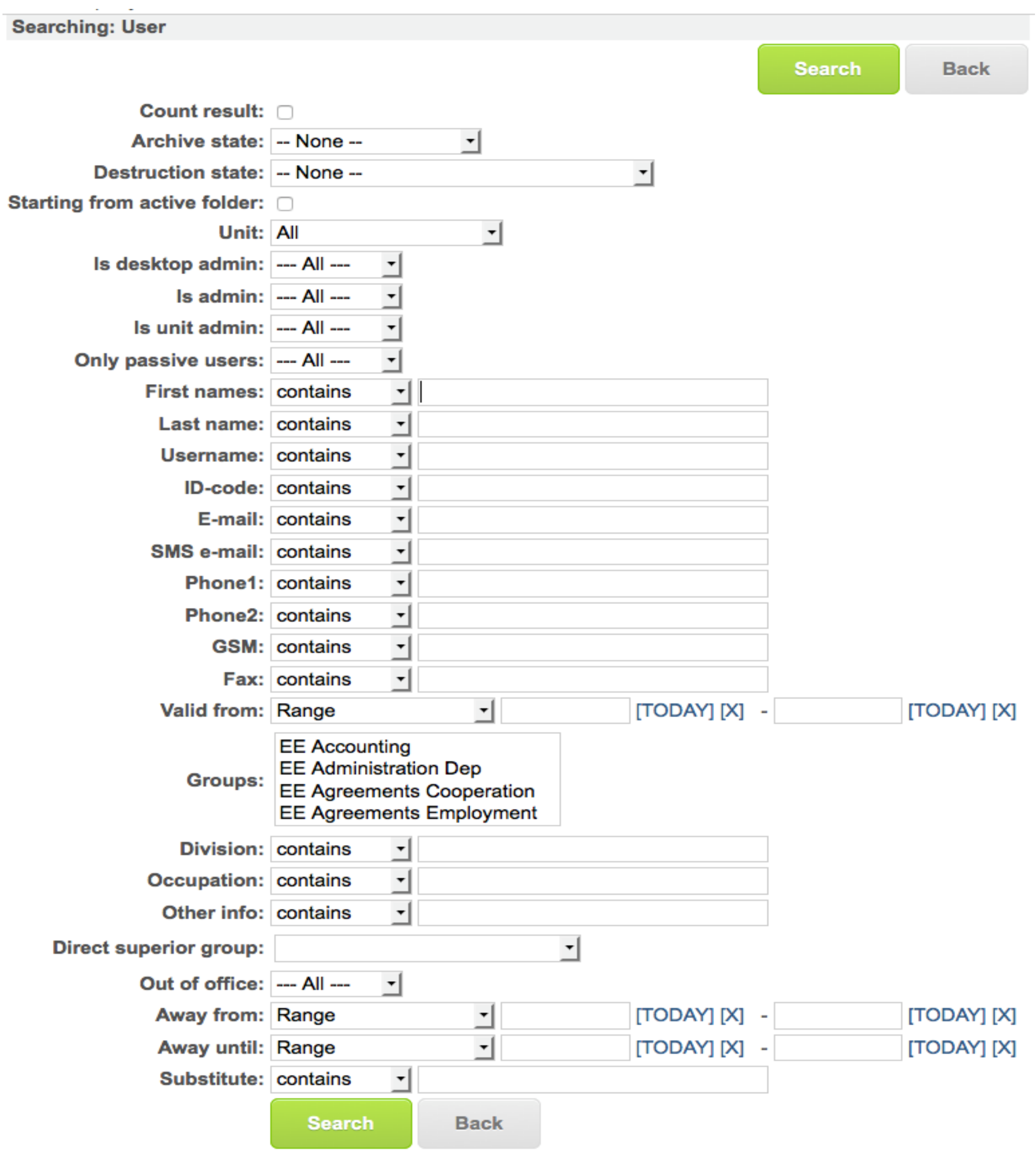
Special rights

Special rights are created in two ways:

- upon routing a document (if such settings have been made in the system);
- upon granting a separate special right.

Searching for user information

1. To search for user-related information, choose “Search” → “User”.
2. The search form opens. Fill in the search cells with respective search values and click on “Search”.



Searching for an absent user and their substitute

An absent user can be searched for using the following criteria:

1. Absent – yes/no;
2. Absent as of – date;
3. Absent until – date.

To search for a substitute, i.e. the replacement of an absent user, enter the name of the substitute.

Intra-organisation circulation of documents

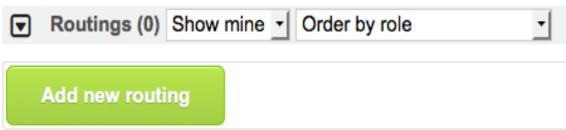
WebDesktop allows system users to forward intra-organisational documents between themselves.

Routing

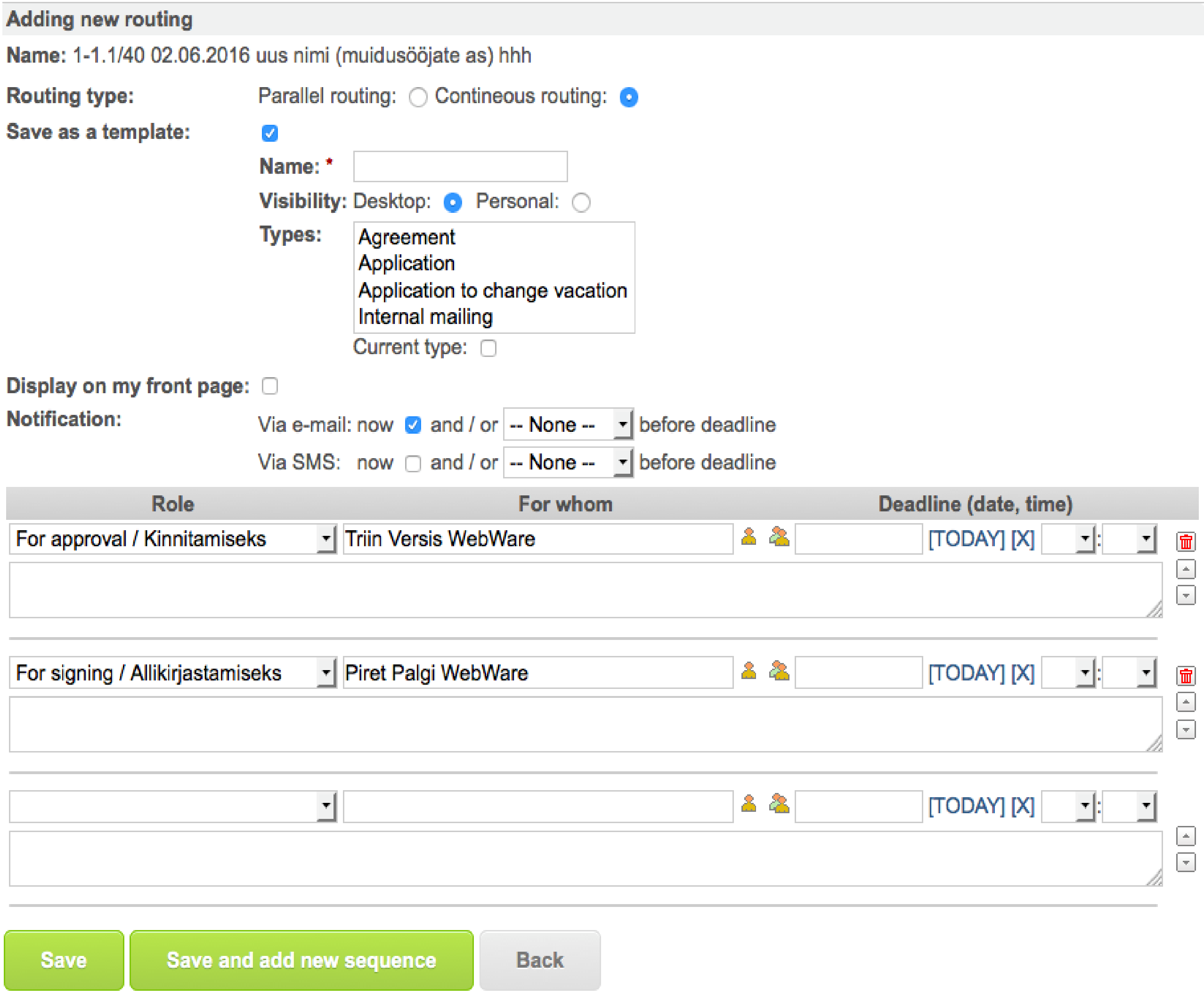
For what?

Routing allows for creating document-related work tasks (e.g. forwarding a document for signature) and observing whether a task has been fulfilled.

Adding new routing



6. Open the document that you wish to route.
7. In the document window, scroll down to the routing block and click on the “Add new routing” button.
8. The new routing window opens.
    - **Routing type:**
        - Parallel routing – all persons receive the document simultaneously. Suitable for forwarding information;
        - Sequential routing – the parties involved get the document one after another. Suitable in the case of a round of approval.
    - **Saved routing** – you can opt for pre-defined saved routing, i.e. a ready-to-use round of approval.
        - Tick in the “Save routing” box.
        - Give the routing a name.
        - If you have ordinary user’s rights, you can set the routing to be visible only to you, i.e. your can save only personal routing circles.
        - Choose data types next to which routing circles are displayed.
        - If you tick “This type”, routing is saved only regarding the type from where you started adding the new routing. For further information see here.
    - **Show on my front page** – you can observe routing on your desktop in the "Other routing" block.
    - **For picking** – using parallel routing, you can send the task for execution to multiple people at once and only one will execute it, i.e. the first one to pick up the task.
    - **Notification**
        - Immediately by e-mail – an immediate e-mail routing notification is sent to the person selected in the “To” field.
        - By e-mail … before closing date - if you set a closing date to the routing activity, you can adjust how much time in advance an e-mail notification is sent regarding routing.
        - Immediately by SMS – an immediate SMS about routing is sent to the person selected in the “To” field.
        - By SMS … before closing date - if you set a closing date to the routing activity, you can adjust how much time in advance an SMS notification is sent regarding routing.
    - **Role** – an activity that needs to be performed with a document.
    - **To** – the person or group to whom you route the document.
    - **Closing date and time** – you can adjust the time limit so that a notification is sent if the routing activity has not been performed. For further information, see the information on notification above.
9. If you have made the choices, click "Save”.



Creation of saved routing

For what?

Saved routing is a ready-to-use workflow with the help of which you can immediately forward a document into circulation.

How to set up?

You can create saved routing in two ways:

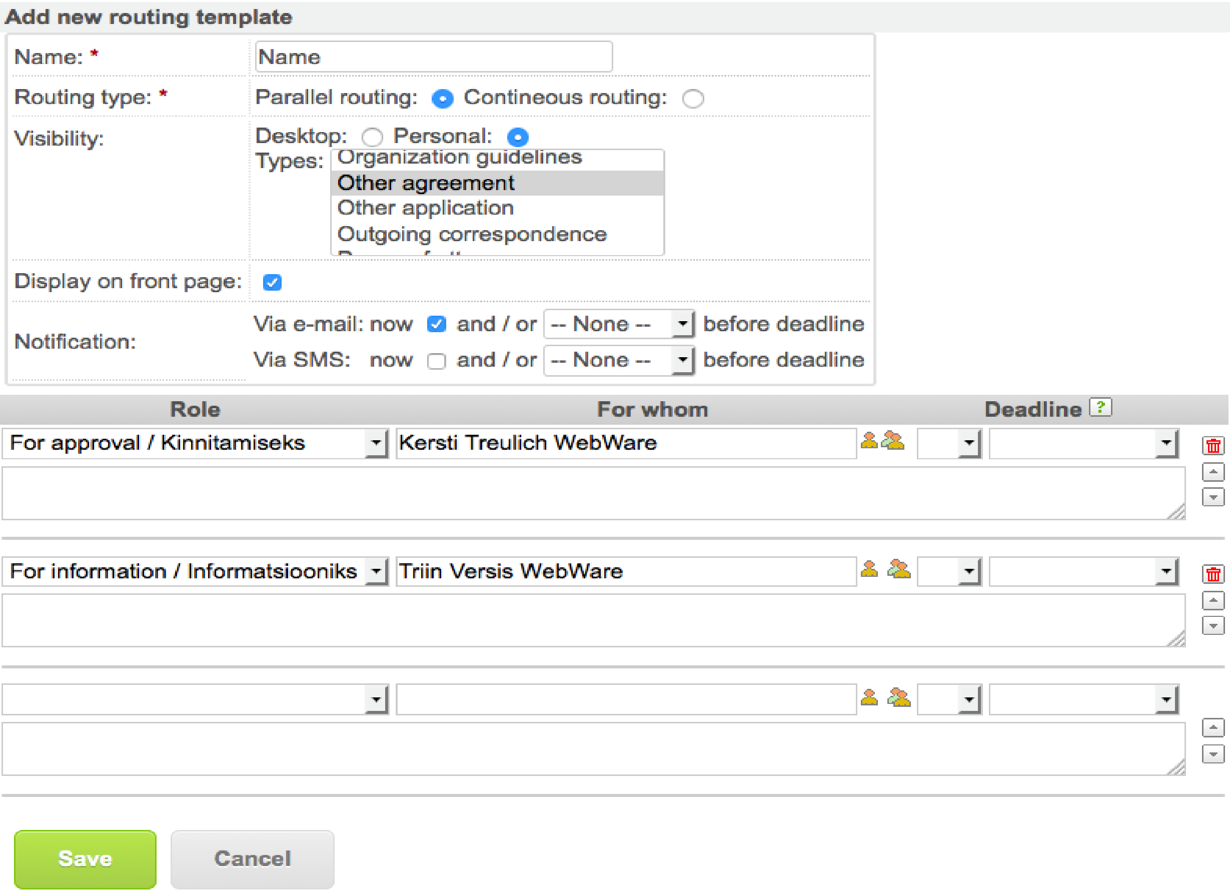
- upon adding new routing;
- in the "Management" menu.

Creating saved routing in the "Management" menu

1. Choose "Management" → "Saved routing".
2. Click on "Add new".
3. The new saved routing addition window opens.

- **Name** – the name of the saved routing that is to be displayed upon adding routing.
- **Routing type:**
  - Parallel routing – all persons receive the document simultaneously. Suitable for forwarding information;
  - Sequential routing – the parties involved get the document one after another. Suitable in the case of a round of approval.

- **Visibility:**
  - Desktop – routing is saved for all users;
  - Personal – routing is saved for personal use, i.e. only for oneself;



- **Types** – saved routing is displayed next to these data types.
- **Show on the front page** – routing is shown on the router's front page in the "Other routing" block (i.e. the router can follow the performance of the routing activities).
- **For picking** – the task is sent for execution to two people at once and only one will execute it, i.e. the first one to pick up the task.
- **Notification**
  - Immediately by e-mail – an immediate e-mail routing notification is sent to the person selected in the "To" field.
  - By e-mail … before closing date - if you set a closing date to the routing activity, you can adjust how much time in advance an e-mail notification is sent regarding routing.
  - Immediately by SMS – an immediate SMS about routing is sent to the person selected in the "To" field.
  - By SMS … before closing date - if you set a closing date to the routing activity, you can adjust how much time in advance an SMS notification is sent regarding routing.
- **Role** – an activity that needs to be performed with a document.
- **To** – the person to whom you route a document.
- **Closing date and time** – you can adjust the time limit so that a notification is sent if the routing activity has not been performed. For further information, see the information on notification above.

4. If you have made the choices, click "Save".

Additional routing e-mail notification

1. To additionally send a routing reminder, open the document to which routing has already been

added.

2. In the course of routing, a small yellow envelope is displayed. When it is clicked, an additional reminder will be sent by e-mail.

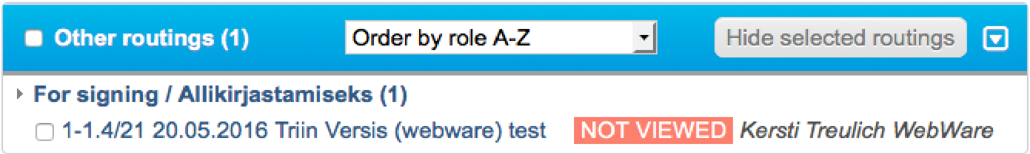
For further information, see the routing process status C.

Deletion of saved routing

1. Choose “Management” → “Saved routing”.
2. In the saved routing list view, click on the recycle bin icon in the “Activities” column.

Following routing

The routing added by you will be displayed in the “Other routing” block if you have ticked in the “Show on my front page” box. See above “Adding new routing”. If you do not wish to follow the routing any more, tick in the box of the respective routing and click on “Remove selected from front page”.



You can also remove the routing that you no longer want to follow on your front page from next to the entry in the routing block using the “Do not show on my front page” button.

If there are many routings on the front page, you can sort the routings. Possible routing options are as follows:

- **Sort by category** – routings are sorted based on the routing role (for approval, signature, etc.),

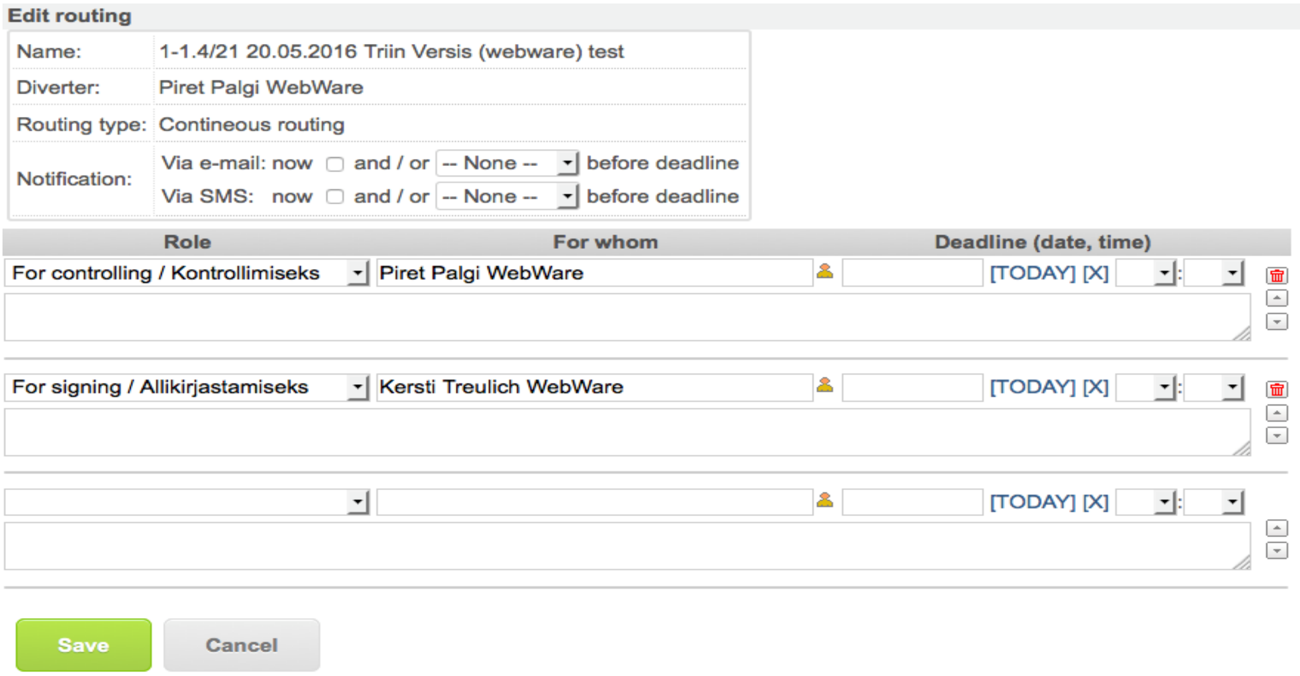
  i.e. on the basis of the order of the routing roles displayed in the new routing addition window;
- **Sort by categories A-Z** – routings are sorted based on routing roles in alphabetical order;
- **Sort by document** – routings are sorted based on the document name, e.g. a document titled "Conclusion of an employment contract" is displayed before a document titled "Instrument of delivery and receipt of assets".
- **Sort by time (decreasing)** – most recent routings are displayed first;
- **Sort by time (increasing)** – mist recent routings are displayed last, i.e. older tasks are displayed first.

Change of routing

Routing can be changed until the person who performs the routing activities has not marked it as completed or asked for feedback. It is possible to change the routing role, the executor of the routing role and the closing date of the routing task.

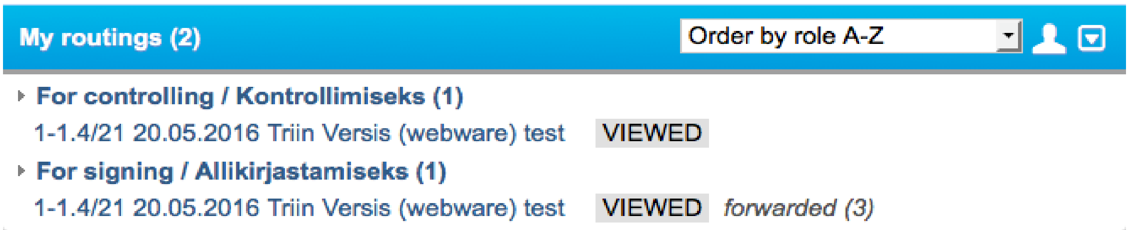
> If you delete an active routing from a chain of sequential routing that has the status “Unseen” or “Seen”, the chain must be restarted manually by clicking on the button “Cancel confirmation”.

In order to change routing tasks and the order of their executors, use the arrows on the right. The routing type (parallel or sequential) cannot be changed. After changing the executor of the routing role, the names of the previous executors of routing activities ("To") and their task statuses ("Seen", "Unseen") are logged (recorded).

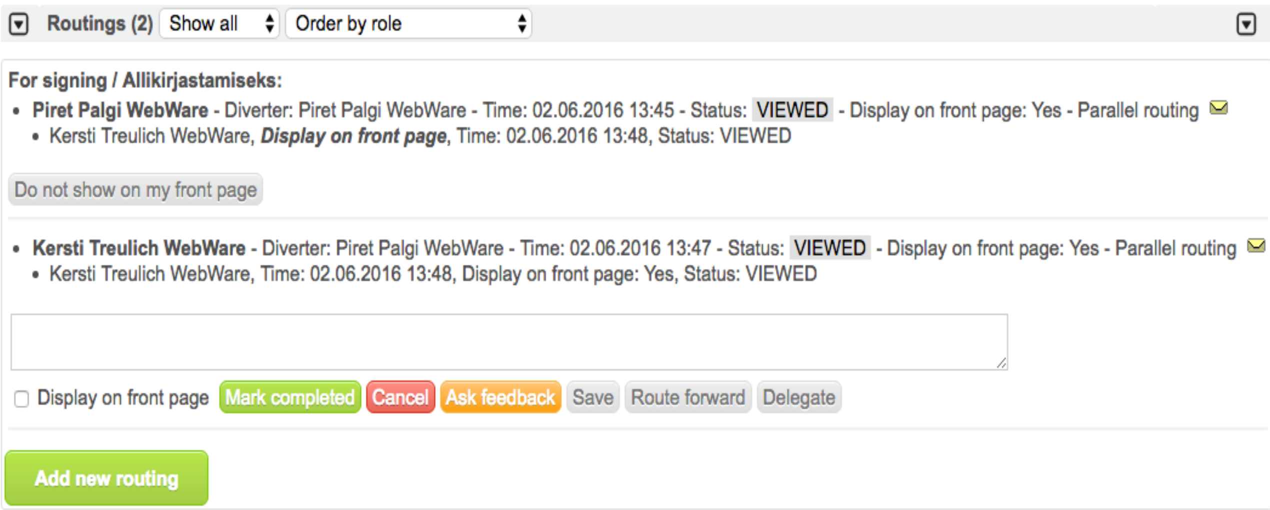


Performance of a routing activity

Documents routed to you are displayed on the front page in the “Routed to me” block. The **name of the entry**, the **activity task**, the closing date of the task (future closing date in black, **expired date** in red along with information on how many days it is overdue) and the **status** (SEEN, UNSEEN) are displayed regarding routing.



1. You can sort routings on the opening page.
   - **Sort by category** – routings are sorted based on the routing role (for approval, signature, etc.), i.e. on the basis of the order of the routing roles displayed in the new routing addition window;
   - **Sort by categories A-Z** – routings are sorted based on routing roles in alphabetical order;
   - **Sort by document** – routings are sorted based on the document name, e.g. a document titled "Conclusion of an employment contract" is displayed before a document titled "Instrument of delivery and receipt of assets".
   - **Sort by time (decreasing)** – most recent routings are displayed first;
   - **Sort by time (increasing)** – mist recent routings are displayed last, i.e. older tasks are displayed first.
2. Click on the desired routing.
3. You will be directed right to the document guidance block along with the following choices.



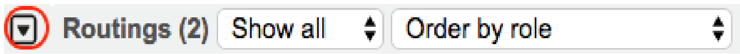
Routing block filters

By default, the routing filters are set to "Show all" (the entire routing circle is displayed) and "Order

by role" (routings are ordered based on the logics of the specific routing circle, e.g. the router has chosen "For approval" as the first role, followed by "For signature"). Routings can also be filtered:

- Show mine – only the task aimed at you is shown from the routing chain;
- Show all – all routings of the routing chain are shown;
- Sort by role – routings are sorted based on the routing role (for approval, signature, etc.), i.e. on the basis of the order of the routing roles displayed in the new routing addition window. For further information on the new routing addition window see here;
- Sort by categories A-Z – routings are sorted based on routing roles in the alphabetical order;
- Sort by time (increasing) – most recent routings are displayed first;
- Sort by time (decreasing) – missed recent routings are displayed last, i.e. older tasks are displayed first.

Routing block closed/open

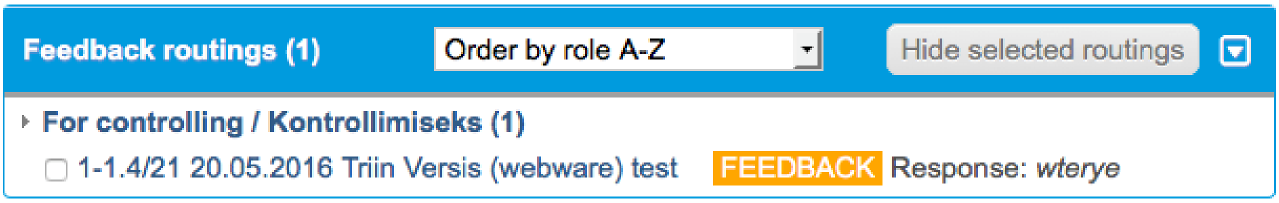


The routing block can be closed completely. To that end, click on the right-pointing arrow icon >.

The following options are displayed to the executor of a routing activity

- Display on front page - you can follow the routing also after you have marked it as completed.
- Mark completed - every routing activity must achieve the status COMPLETED. Thereafter routing will also vanish from the front page from the "Routed to me" block. In the case of sequential routing, the next user can attend to the document further and until they have completed their part and the preceding user's status is anything but "Done", the routing status of the next user remains "Pending". Upon routing whereby the status is "Done", the confirmation can be cancelled and thereafter the routing will be indicated on the user's front pages with the status NOT VIEWED.
- Cancel – to cancel a routing, e.g. if the document has been routed to the wrong person, etc. In such an event the document is shown on the front page of the router where they see that the user has cancelled the routing. It is not shown on the user's own front page, unless they have specifically requested it by ticking in "Show on front page". Upon routing whereby the status is "Cancelled", the confirmation can be cancelled and thereafter the routing will be indicated on the user's front pages with the status "Not viewed".

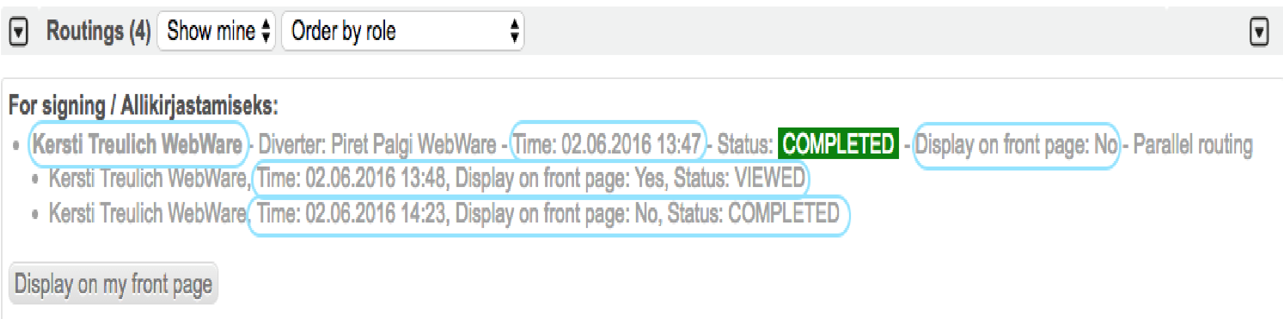
- Ask feedback – for asking for feedback. In such an event it is displayed on the front page of the router of the document in the “Feedback asked from me” block where they see that the executor of the routing task has marked feedback on the routing. The executor sees the routing in the "Routed to me" block as having the status "FEEDBACK".



  - Feedback routings move to a separate block “Feedback asked from me” on the router’s front page. If the router asks for feedback, the routing will move from the “Other routings” block (if "Show on my front page” has been selected) to the block "Feedback asked from me".

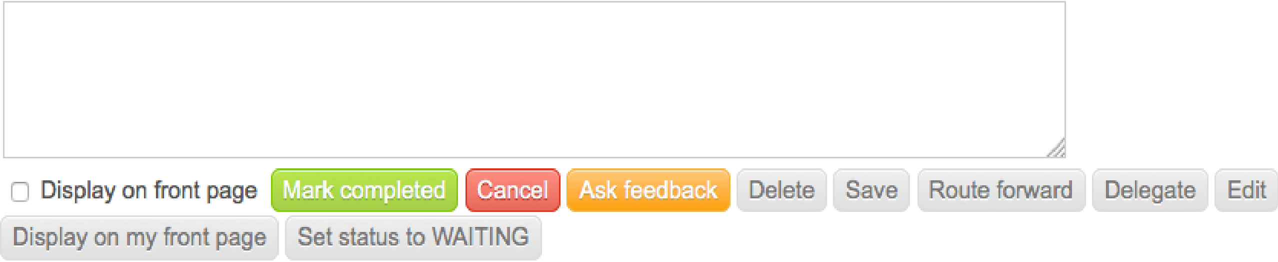
- Answer feedback (“Reply to feedback”) – used in order to reply to feedback. The person from whom a reply is expected cannot lose the entry from their front page before they have pressed the button "Reply to feedback" (depends on the …?).
- Delete – to delete a routing made by oneself. Routings made by others can be deleted by the administrator.
- Save – if necessary, you can save interim comments without changing the routing status. In such an event there will be a respective row in the information, which contains recorded information.
- Route forward – if necessary, you can route the document further. This is so also if you merely have the right to read (view) the document. Upon selecting the new executor of a routing task, the task is automatically marked as done (in the box titled "Mark my task as done" a tick must remain by default). On the opening page, the router and the person monitoring routing are shown that the document has been routed further (e.g. re-routed (3)).
- Delegate – you can delegate routing under the same or another role so that it will move to another employee and it is not marked as done. After confirming delegation, the routing will vanish from your front page. If you click on the “Delegate” button, the window “Delegate to another user” will be displayed. There, you need to enter the user's name and, if you wish, add a resolution, i.e. additional information about the task. An e-mail notification is sent on a delegated work task.

If you have marked a routing as done, your routing will become inactive (the text is in grey) and the routing will move to the next employee, provided that the routing circle has been made respectively.



The router is displayed the following options during the period of performance of a routing activity:

1. **Routing process status A – the routing activity has not been marked as done yet.**



The buttons "Display on front page", "Mark completed", "Cancel", "Ask feedback", "Save", "Route forward" and, if the routing has not been marked as done yet, the following buttons are displayed to the router:

Delete – you can delete one part of the routing chain;

Delegate – the opportunity to delegate;

Edit – you can change one part of the routing chain (the routing role, the executor of the routing role, etc.). For further information, see here.

Set status to WAITING – the router can put a work task on hold. During this time the work task is not displayed in the executor's front page. A document having the status "Waiting" can be submitted for execution using the "Cancel confirmation" button.

2. **Routing process status B – routing is marked as done.**

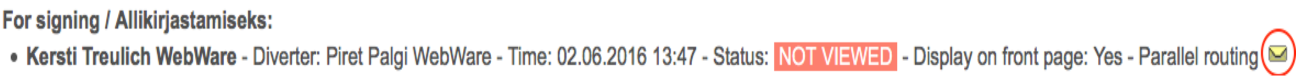
The following buttons are displayed to the router:

Cancel confirmation – the document execution confirmation is cancelled and the document moves back to the front page of the employee to whom the document was routed.

Do not show on my front page – the document is no longer shown to the router in the "My routings" block, i.e. the following of the routing is terminated. For further information, see here.

Set status to WAITING – the router can put a work task on hold. During this time the work task is not displayed in the executor's front page. A document having the status "Pending" can be submitted for execution using the "Cancel confirmation" button.

3. **Routing process status C - routing has not been attended to. An additional reminder about the routing should be sent.**



To additionally send a routing reminder, a small yellow envelope is displayed. When it is clicked, an additional reminder will be sent by e-mail.

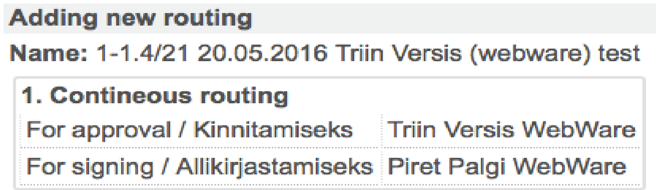
The following information is displayed in the upper part of the window.

Combining routing

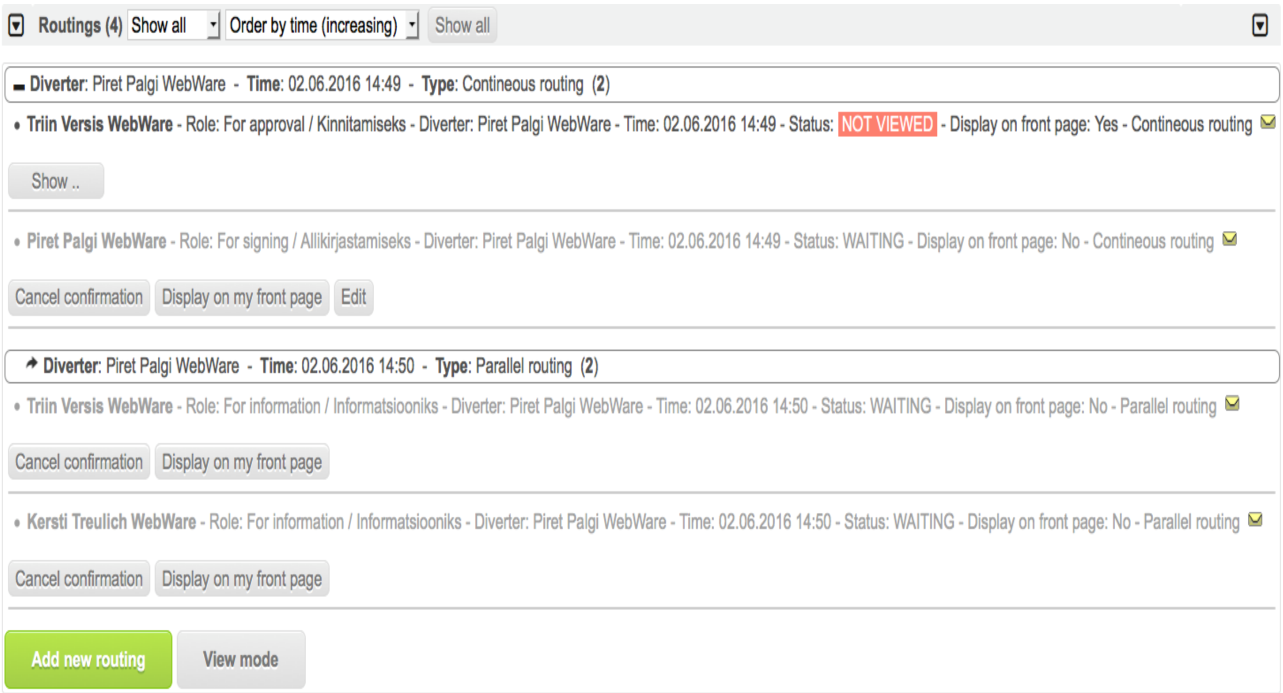
Sequential routing and parallel routing can be combined. For instance, it may be practical to have sequential circulation of the document first and to activate parallel routing thereafter automatically. Routings can be combined any number of times, i.e. the combined routing chain may consist of any number of routings.

1. To draw up a combined routing circle, click on "Add new routing" and fill in the routing form.
2. Click 

.
3. You will be taken to the new routing addition window where the first part of the routing chain is displayed in the upper part of the window. Add the second part of the routing chain. If you wish to make the routing chain longer, click the respective number of times on **"Save and add new"**. Once the combined routing chain is ready, click "Save".



4. You will be taken to the routing block where you will see the initiated routing chain.
5. The combined routing chain can be changed to the extent of only one chain part, i.e. if the chain consists of two parts a) sequential routing and b) parallel routing, then for changing the chain (adding and removing users) changes need to be made in both parts of the chain. Thereby in the parallel routing part changes must, in turn, be made separately as well.



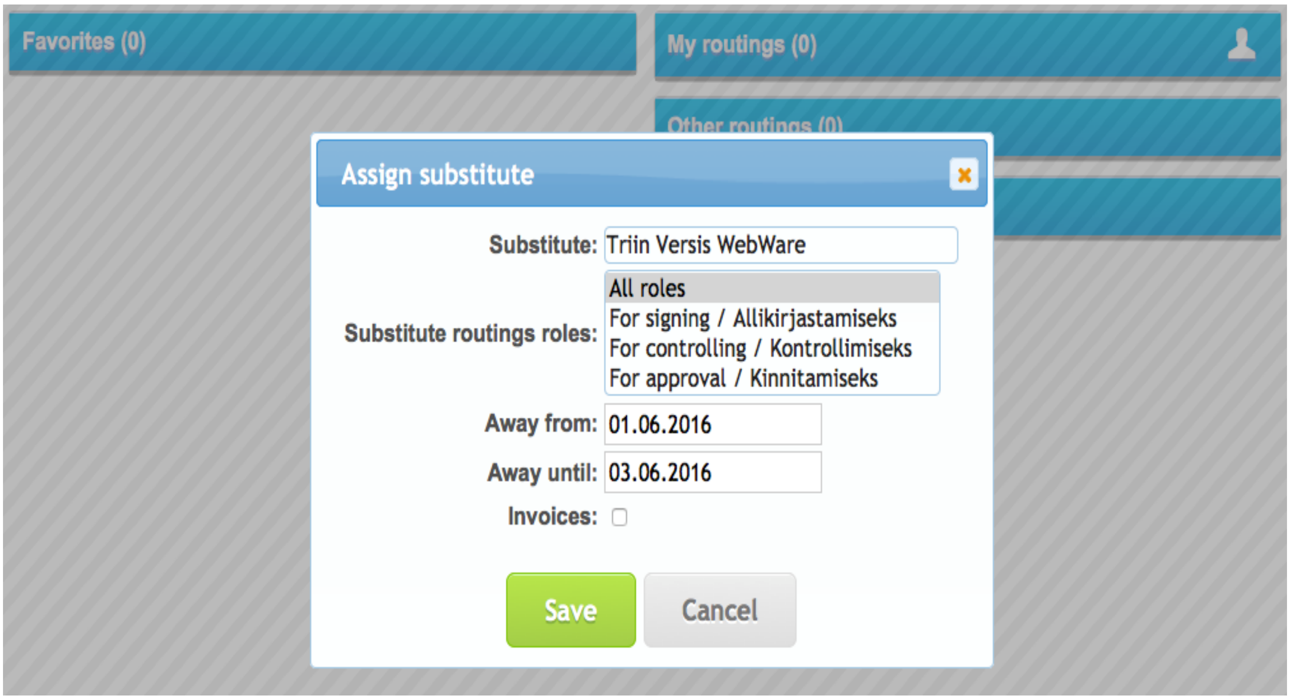
Substitutions (as of WD 5.0.2)

A substitute can be appointed in two ways:

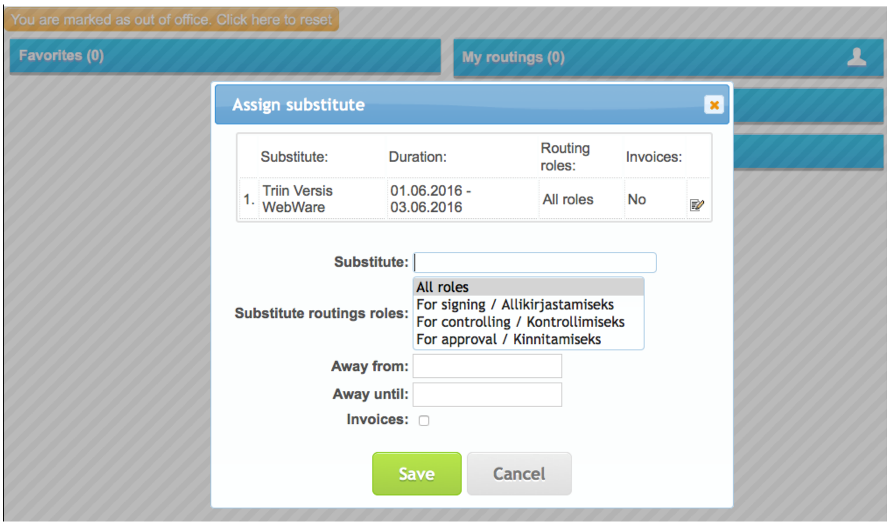
1. using the opening page icon in the "Routed to me" block ;
2. in the user card.

Appointing a substitute on the front page

3. Fill in the substitute, the substitute's routing roles, away as of, and away until. All the fields are mandatory.
4. Click on "Set" if you wish to confirm the substitute or "Cancel" if you wish to abort the substitution. In WD, the yellow button "You have marked yourself as away from office. To remove the notice, click on this button." is shown throughout the system in order to remind you in the system that you have marked yourself as absent.



5. The substitute is added automatically to the timetable in the user card (see the user card).
6. If you go to add a new substitute via the front page, the previously appointed substitutes will be displayed in the substitute appointment window.

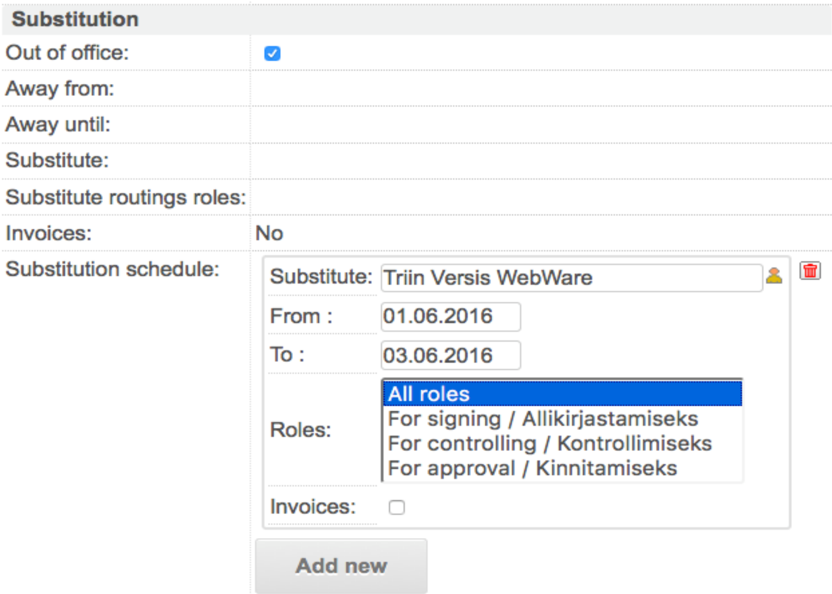


Appointment of a substitute in the user card

7. Open your user card. For that purpose choose **“Management”** → **“My info”**.
8. Scroll to the block **“Substitution”** and tick in the **“Absent”** field if you wish to mark yourself as absent.
9. The following fields “Absent as of”, “Absent until”, “Substitute” and “Substitute’s routing roles” cannot be filled in. The system fills these fields in automatically and they reflect the substitute who is currently active in the substitution timetable or whose substitution period has arrived.
10. **Fill in the substitution timetable.** All the fields are mandatory.

- Add the substitute.
- The start date of substitution.
- The end date of substitution.
- The substitution role. Routings with the selected role reach the substitute.
- If you wish to add the following substitutes, click on “Add new”. If you add more than one substitute to the timetable, the start and end dates of substitution must not overlap.

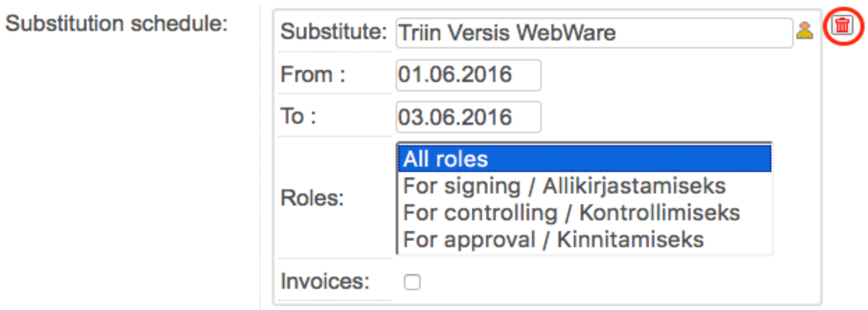
11. Next, click "Save”.



Changing the data of the appointed substitute and deletion of the substitute

If the substitute has been appointed and you wish to change the data, you can do so in the timetable of substitution in the user card.

You can delete the substitute in the user card in the substitution block using the recycle bin icon.



Transfer of document-related rights to the substitute

> **PLEASE NOTE:** The transfer of rights can be configured and, as a rule, the WebDesktop user support does it. By default, the rights do not transfer to the substitute.

1. Rights move to the substitute via routing. If an employee has marked themselves as absent and appointed a substitute, the substitute will get documents with the routing roles that the substitute is authorised to execute.
2. During absence, the substitute is given the right of the same level regarding new routings, so that all activities required for substitution can be performed equally.
3. During substitution, the substitute gets special rights for working with the documents of the person who is being substituted. After the end of the substitution, temporary special rights are removed, except on the documents whose statuses have been marked as done, cancelled or feedback.
4. Upon granting a special right, the routing role attributed upon substitution is also taken into account.

Notification of the substitute

At the moment of sending a notification it is verified whether there is a substitute, who it is and a notice is sent accordingly. It can be configured from the configuration file and it is possible to send a notice to both (the one who is absent and the substitute), only to the one who is absent and only to the substitute. By default, the configuration file provides that an e-mail notice is sent only to the one whom the document was routed, i.e. to the one who is absent.

What happens when the substitution period ends?

If the date arrives in the substitution timetable for which no substitute has been appointed, the absence will be automatically removed. The yellow button of absence will vanish from the front page of the absent person.

Intra-organisational circulation of documents

There are three options in WebDesktop when it comes to the manner of sending documents outside the system:

- the e-mail module;
- DVK;
- sharing a document with outsiders.

E-mail module

Whether you can use the e-mail module of WebDesktop in the case of one or another type of document depends on the settings adjusted by the administrator.

How to use?

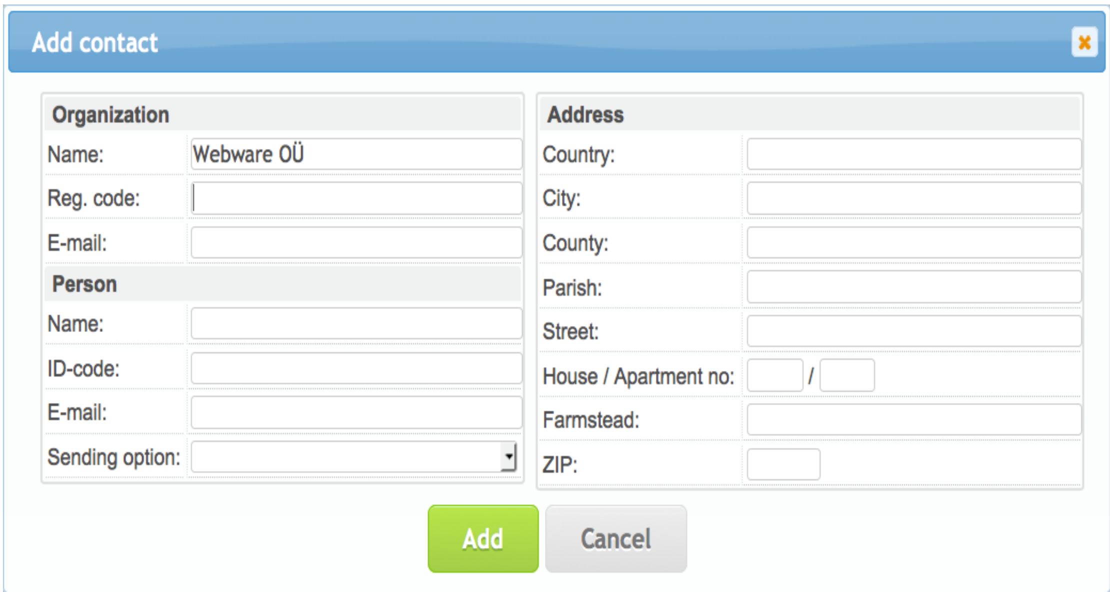
1. Sending a document by e-mail using the register of contacts solution (as of 5.0.0).
2. Sending a document using the “Send by e-mail” button (traditional solution).

Sending an e-mail message using the register of contacts solution

Adding a contact

1. Click on the "Add recipient" button. / “Add sender” (depends on the name of the field in the system).

2. The contact addition window opens. Fill in the organisation, contact person and the organisation's postal address data fields and, if you want, insert information on how the document reached the organisation or how it was sent to the other organisation.
   - If you add a completely new contact and fill in only the organisation part, one entry will be created in the register of contacts.
   - If you add a new contact and fill in the organisation and person parts, two entries will be added to the register of contacts. One entry will be created regarding the organisation's general details. The other entry contains the organisation's general details and the details of the contact person.



3. Click on **"Add"**.
4. Until the document has been sent to the recipient, a red border is displayed around the sender's block. After submission the border vanishes.
5. If you wish, you can remove a contact, change a contact or duplicate a contact in the document change form. If you have inserted more than one contact, you can change their order .

Contacts are registered in the contact data type where you can change added and saved contacts.

Changing a contact

You can change contacts in the register of contacts (**"Management"** → **"Contact"**) or next to the document if you associate a contact with the document.

The right to delete a contact depends on the settings of the system. System administrators always have the right of deletion.

Contacts

	Unit	Type	Organization name
	Latvia	jur -- Juriidiline isik	Vinijs Pūks
	Estonia	jur -- Juriidiline isik	uus firma
	Estonia	jur -- Juriidiline isik	uus firma
	Latvia	jur -- Juriidiline isik	Tinkijs Vinkijs
	Latvia	jur -- Juriidiline isik	tinkijs test
	Lithuania	jur -- Juriidiline isik	test baltnet
	Lithuania	jur -- Juriidiline isik	test baltnet
	Latvia	jur -- Juriidiline isik	SuperMuper SIA
	Estonia	jur -- Juriidiline isik	Seesam Insuranse AS
	Estonia	jur -- Juriidiline isik	Seesam Insuranse AS
	Estonia	jur -- Juriidiline isik	Seesam Insurance AS Tartu

Contacts register view

Contacts register view in the management menu, i.e. list view

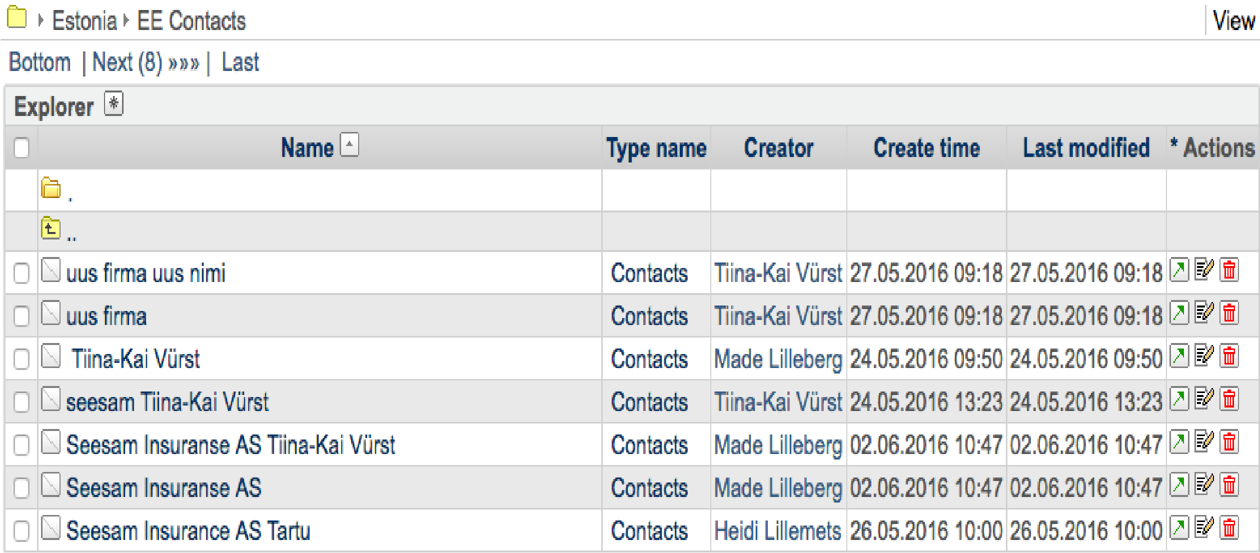
1. If only the person part of a contact card is filled in, the contact is

automatically registered as a natural person (see the screenshot).

2. The contact card of the organisation.
    - General contact card + contact person.
    - General contact card.

Contacts register view in the structure tree

Contacts are displayed in the structure tree on the basis of the dynamic name rule.



Estonia ▸ EE Contacts | View

Bottom | Next (8) »»» | Last

Explorer

Name	Type name	Creator	Create time	Last modified	* Actions
.					
..					
uus firma uus nimi	Contacts	Tiina-Kai Vürst	27.05.2016 09:18	27.05.2016 09:18	
uus firma	Contacts	Tiina-Kai Vürst	27.05.2016 09:18	27.05.2016 09:18	
Tiina-Kai Vürst	Contacts	Made Lilleberg	24.05.2016 09:50	24.05.2016 09:50	
seesam Tiina-Kai Vürst	Contacts	Tiina-Kai Vürst	24.05.2016 13:23	24.05.2016 13:23	
Seesam Insuranse AS Tiina-Kai Vürst	Contacts	Made Lilleberg	02.06.2016 10:47	02.06.2016 10:47	
Seesam Insuranse AS	Contacts	Made Lilleberg	02.06.2016 10:47	02.06.2016 10:47	
Seesam Insurance AS Tartu	Contacts	Heidi Lillemets	26.05.2016 10:00	26.05.2016 10:00	

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.

Sending a document to a contact organisation/person

1. Click "Send". The sending window opens, displaying, depending on the contact and your WD settings, e-mail, DVK, ADIT and other sending options.
2. Possible sending manners, incl. e-mail and use thereof:
    a. **DVK** – by default, the status is "TO BE SENT" (provided that the organisation has joined DVK).

    To send a document to DVK, choose 

if you wish to send it to one recipient or 

if you wish to send it to multiple recipients. For further information on sending a document via DVK see here.

b. **ADIT** – by default, the status is „TO BE SENT" (provided that the contact person has joined ADIT). Choose "Send by DVK/ADIT".

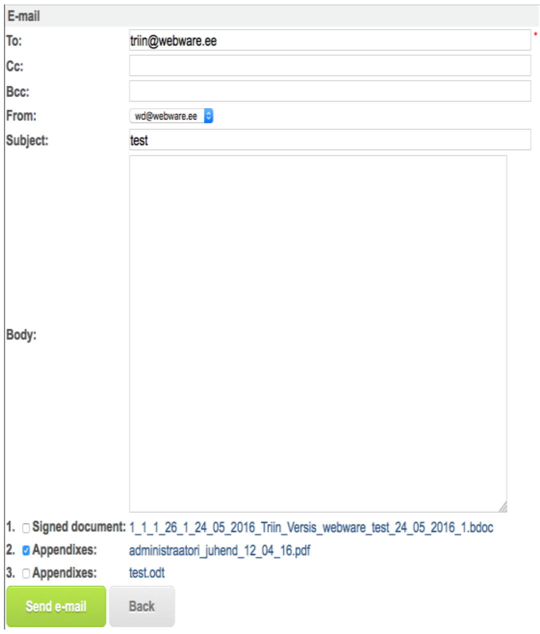
c. **E-mail** – by default, the status has not been chosen. If you wish to send the document by e-mail, you must choose "TO BE SENT" and the status and click on the "Send" button.

If you wish to send the document to one recipient, click on 

. In order to send a document to multiple e-mail addresses at once, choose 

.

d. **Manner of sending** – if a document is sent via another information channel (fax, hand delivery, post), you can indicate it and click on the "Mark as sent" button.



3. If you have chosen "Send e-mail", the e-mail window will open.

4. After sending the document, the status will change to "SENT".

5. If the document has been sent to the sender via DVK and/or by e-mail, the following is displayed in the document view and list view:

Webware OÜ <DVK>
Jana Jauram <jana.jauram@weblane.ee>, Weblane OÜ

The e-mail address where it was sent and/or DVK is/are displayed between the <> characters. The respective notation is generated in the "Sent e-mail" block in the document entry regarding documents sent by e-mail.

Searching for a document based on the contact organisation and contact person

In the document search form, you can search for a document based on the name of the organisation and the name of the contact person. In addition, you can search for a document based on the manners of sending (DVK, ADIT, e-mail, other). The manner of sending "Other" contains all other manners of sending, which have been added to the classifier "Manner of sending of document" and are displayed in the selection of manners of sending upon adding a contact.

Adding a contact in the list view

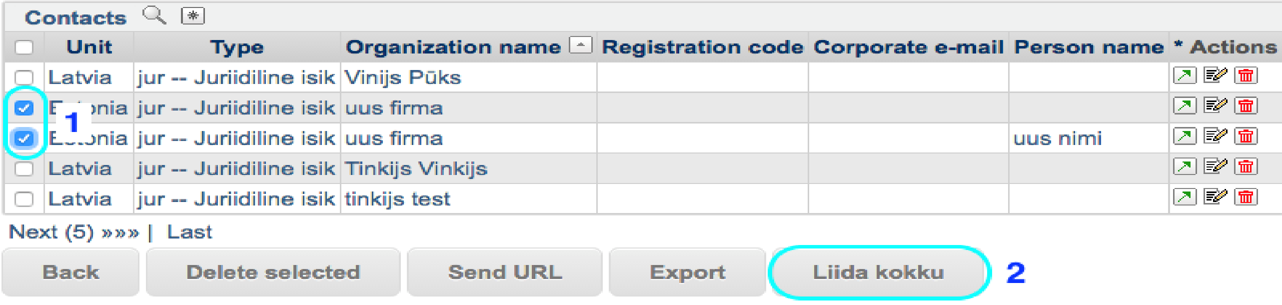
For what?

Using the contacts merger functionality, you can adjust the register of contacts, i.e. delete double contacts (excessive contacts). Thereby related entries (documents and other objects) are taken from deleted contacts and connected to the retained contact.

> Contacts can be merged at all administrator levels and by ordinary users who are authorised to delete the folder of contacts.

How to use?

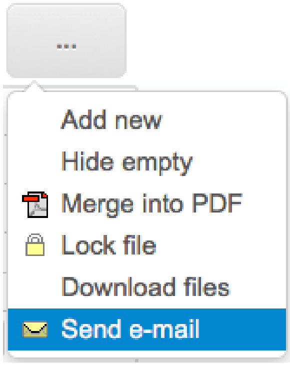
1. Open the contacts list view (e.g. from the "Management" menu) and tick the contacts that you wish to merge.
2. Click on "Merge"/"Liida kokku".



3. The contact merger window opens. There, choose the contact to be retained. Duplicate contacts are deleted and the documents and other objects connected to them are connected to the selected contact.

Sending using the “Send by e-mail" button

1. Open the document that you wish to send outside the system by e-mail.
2. Click on the button “Send by e-mail”.
3. The e-mail window opens. Some of the cells are pre-filled (depends on the settings). If you wish, you can make changes in the window. At the bottom you can see files and you can choose which files are sent with the message.
4. If you have made the required changes, click "Send by e-mail”.



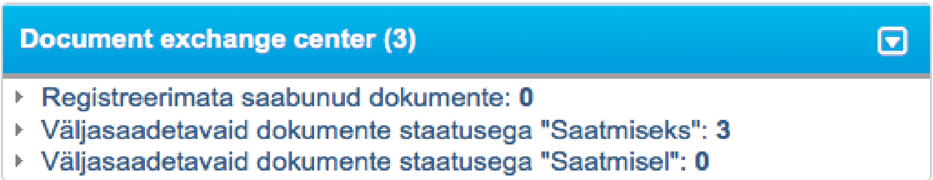
DVK

The document exchange centre (DVK) is a common information system that provides various records management systems (DHS) and other document-managing information systems with centralised document and information exchange services. For further information on DVK, see:
https://www.ria.ee/dokumendivahetus/.

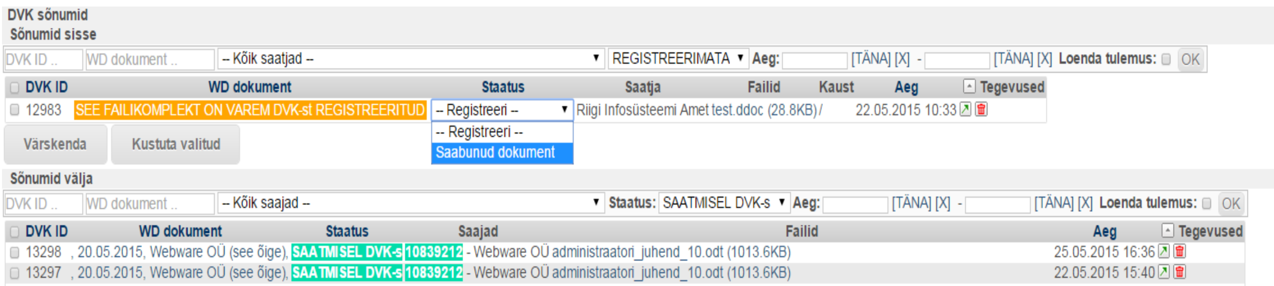
How to use?

Registration of an incoming document

1. If you belong to the DVK registrars group, the document exchange centre block is displayed on your front page. To register a document, click on “Register incoming documents”.

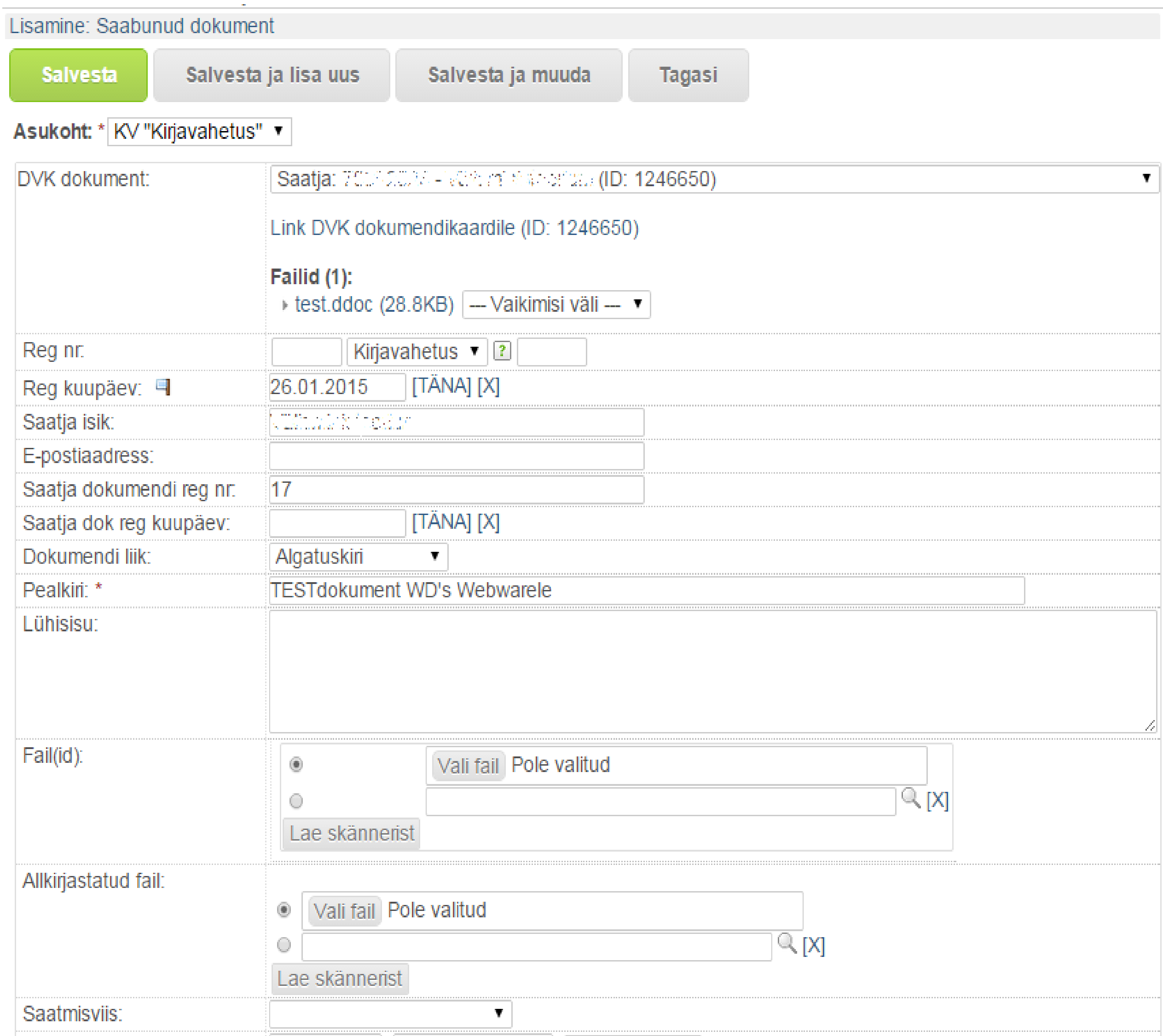


2. The DVK message block “Incoming messages” opens and displays unregistered documents. Choose the desired data type (e.g. "Received document") instead of the status "Register" in the

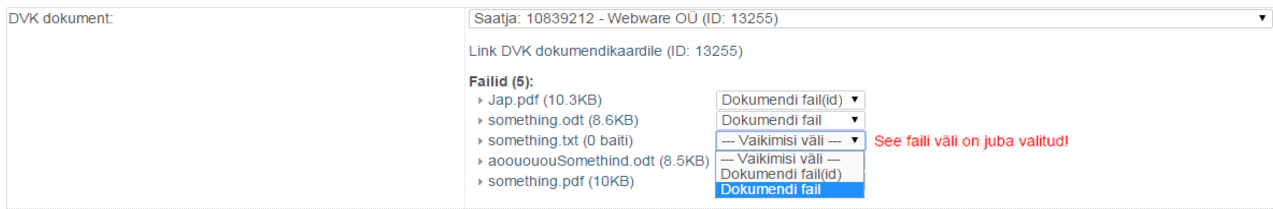


“Incoming messages” block.

3. The document registration form opens. Certain meta data fields are filled in automatically.



4. By default, the file(s) is (are) saved in the first multiple-file field on the entry. If necessary, you can determine on which file field the files will be saved. Thereby, if the single file field has been chosen for saving, a respective message will be displayed.



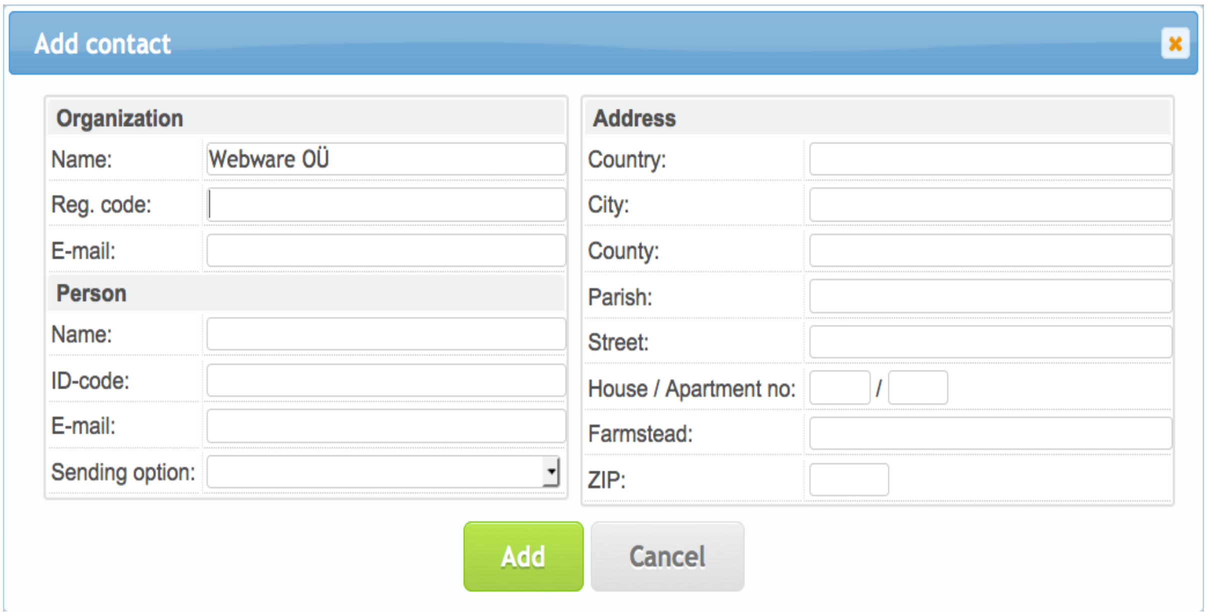
5. Once the desired fields have been filled in, click on “Save”.

Using DVK (as of 5.0.2)

Adding a contact

1. Click on the "Add recipient" button. / "Add sender" (depends on the name of the field in the system). 

2. The contact addition window opens. Fill in the organisation, contact person and the organisation's postal address data fields and, if you want, insert information on how the document reached the organisation or how it was sent to the other organisation.



3. Click on **"Add"**.
4. Until the document has been sent to the recipient, a red border is displayed around the sender's block. After submission the border vanishes.
5. If you wish, you can remove a contact , change a contact or duplicate a contact in the document change form. If you have inserted more than one contact, you can change their order .

Contacts are registered in the contact data type where you can change added and saved contacts.

Sending a document to the contact organisation/person via DVK

1. If the document is connected to a contact, you can send the document via DVK.
2. To that end, click "Send". The sending window opens where, according to the contact and your WD settings, the possibility of sending via DVK is displayed. **PLEASE NOTE: In the contact card, the organisation's registry code must be filled in.**
3. By default, the status is "TO BE SENT" (provided that the organisation has joined DVK). To send a document to DVK, choose 

if you wish to send it to one recipient or 

if you wish to send it to multiple recipients.
4. The DVK sending window opens. Data is transferred from the document there based on the

system settings.

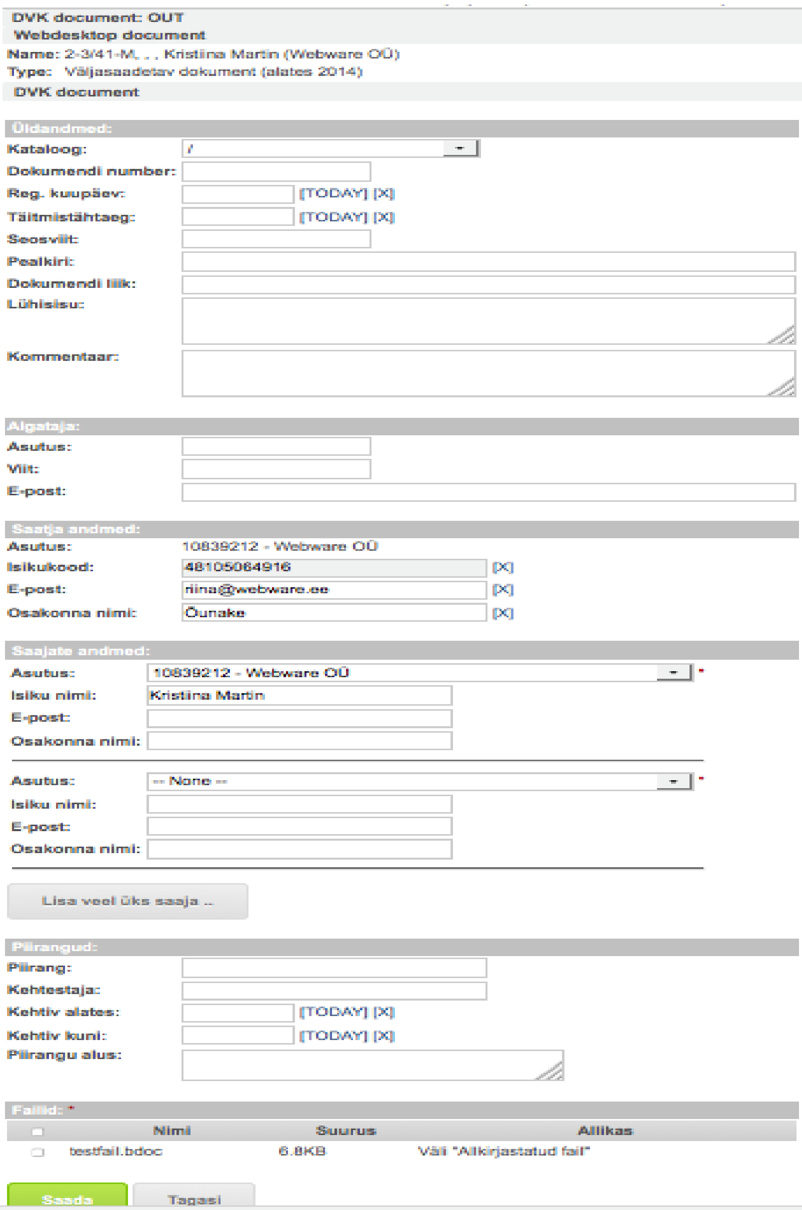
5. In the files block you can choose files sent via DVK.
6. Click “Send”.

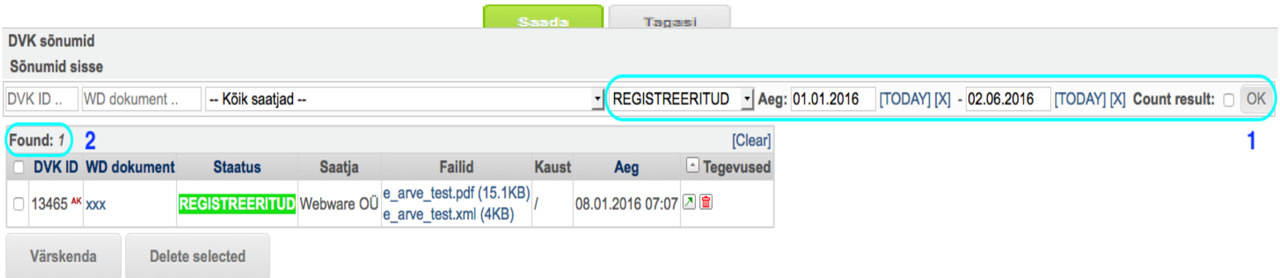
Counting documents registered / sent from the DVK module

Documents registered and sent from the DVK module can be listed.

1. To count, adjust search filters in the header of the “Incoming messages” or "Outgoing messages" block. Once the filters have been adjusted, tick “Count result” and click “OK”. All documents received and registered in DVK between 01.01.2015 and 29.05.2015 are listed in the next example. In addition, it is possible and, where necessary, practical to count DVK documents based on the WD document’s dynamic name and sender/recipient.

2. The counting result is displayed to you.





Signature of a document

In WebDesktop, there are two options for signing the document:

- server-based signature using the Add signature ("Add signature") button;
- signature using the direct change icon and Java.

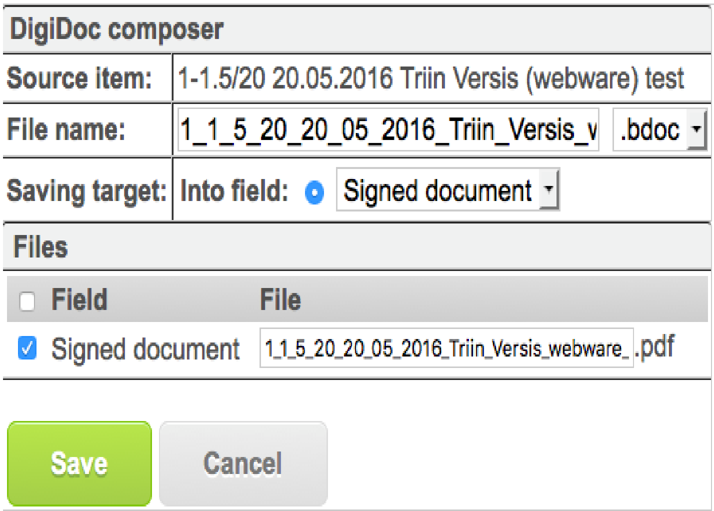
Server-based signature

For what?

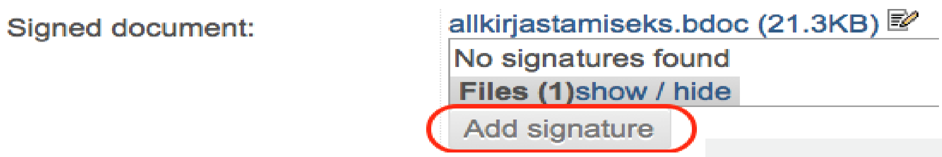
Under server-based digital signature we mean the web browser plugin of Sertifitseerimiskeskus interfaced with WebDesktop, which is similarly used in, for instance, Estonian online banks. For server-based signature there is no need for another program (e.g. DigiDoc Client), but you can sign the document directly in WebDesktop.

How to use?

1. **Open the entry view form.**
2. **If a BDOC file has been prepared for your file field, read point no. 4.** If the file is in, for instance, PDF or DOC format, click on the button "Create DigiDoc document".
3. The "Creation of DigiDoc" window opens along with the following options:
   a. "File name" – you can change the name of the BDOC container to be created;
   b. "Saving location" – you can choose the field where the BDOC document is created;
   c. "Files" – you can choose the files that are gathered into a BDOC container.
   d. After making a choice, click on "Save".

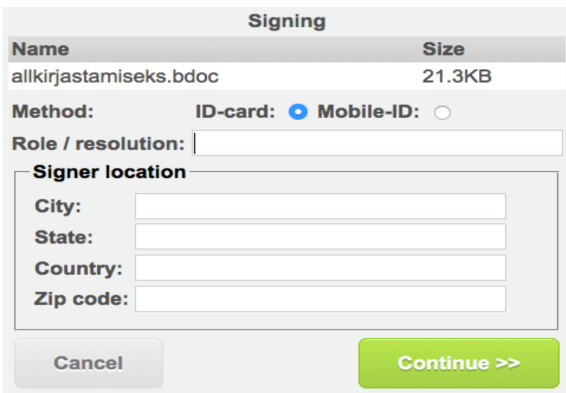


4. **To sign, click on the "Add signature" button next to the BDOC container.**

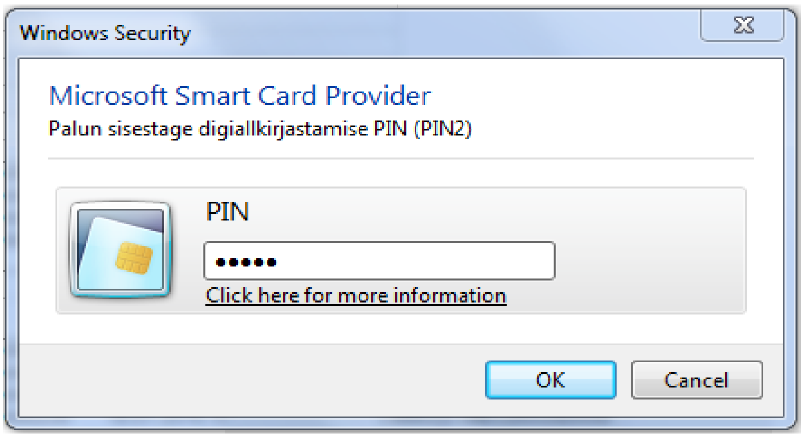


- The server-based signature button is big and green if a routing with the signature role "To be signed digitally" has been made for me and bdoc does not have my signature.

5. The manner of signature (ID card or Mobile ID) opens. **Make your choice and, if you wish, add information on the signature location.** Choose "Continue".



6. Next, **choose your personal card certificate** and **enter PIN2**.



> Please note: BDOC is a signature software standard preferred by default in Estonia as of 2015. For further information see https://www.ria.ee/bdoc-vormis-digiallkiri/.

Signature using a direct change button

For what?

With the direct change button you can open the DigiDoc Client program if it has been installed on your computer. Next, you can sign the document in DigiDoc and after signature the signed file is loaded back to the WebDesktop file field.

How to use?

The start of the signature process using the direct change button is similar to server-based signature.

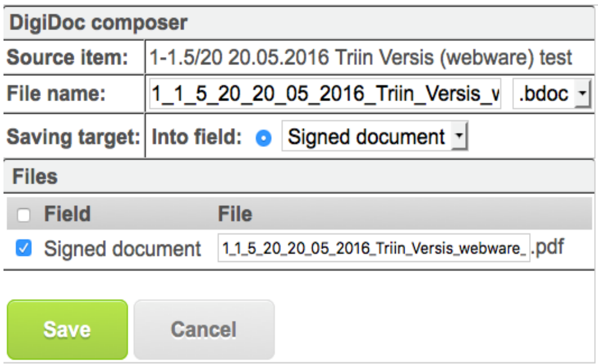
1. Open the entry view form.
2. If a BDOC file has been prepared for your file field, read the next point. If the file is in, for instance, PDF or DOC format, click on the button „Create DigiDoc document“ .
3. The "Creation of DigiDoc" window opens along with the following options:

   b. "File name" – you can change the name of the BDOC container to be created;

   c. "Saving location" – you can choose the field where the BDOC document is created;

   d. "Files" – you can choose the files that are gathered into a BDOC container.

   e. After making a choice, click on "Save".



4. To sign, click the icon "Change or open to change" next to the BDOC container.

Simultaneous digital signature and direct changing

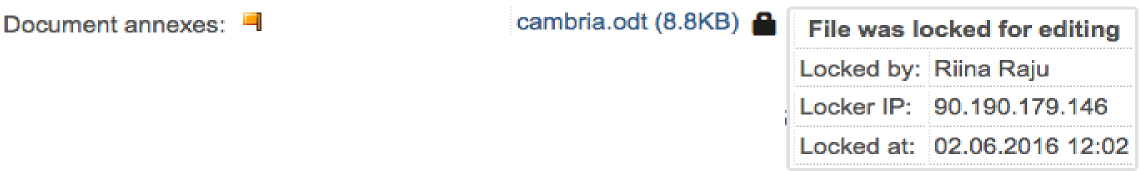
For what?

- If one user signs using the "Add signature" button or the direct change button, other users will not be allowed to sign the same file and a respective notice is displayed, indicating the name and IP address of the signing user and the locking time. The locking of the file precludes the possibility that only the last signature is saved when the file is signed simultaneously. After the file has been properly signed, the file will be automatically unlocked.

- If the file is locked as a result of signing and remains locked, it will automatically open in 5 minutes. If direct changing locks down, the file will unlock itself once the user leaves the entry.

How is it expressed?

- If a user has opened the file for signature using the yellow folder or the "Add signature" button, the lock icon and a respective **message will be displayed to other users at the same time**. The locking of the file also functions in a sharing solution.

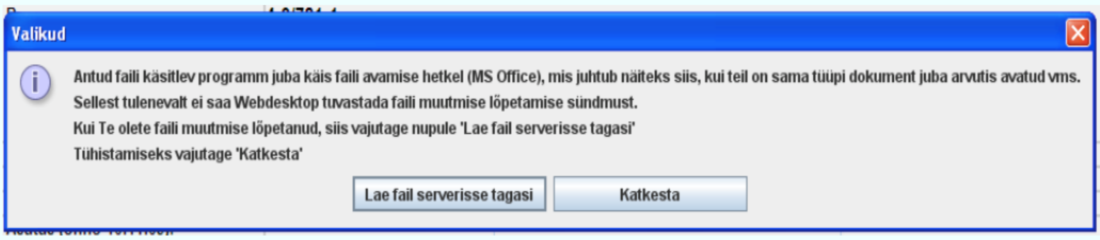


- **The desktop and standard administrator and the locker of the file can always unlock the file** (the unit administrator does not have the right) – the message "To open the file, click on the lock" is displayed.

- After the file has been properly signed, the file will be automatically unlocked.

If, for instance, with the help of the direct change solution, the signature process is not properly completed, the file may remain locked and in such an event it must be unlocked manually. In the file change warning window, you need to make a choice so that the change session is properly completed.

The file remains locked if it is opened using the yellow folder, not by clicking on the file name and no actions follow (signature in DigiDoc Client or changing in the word processing application). The yellow folder is for signing the file in DigiDoc Client or for changing the file.



If software that is able to process the respective document already runs in the computer, you will get a warning with options whereby you must make a choice.

Use of a third party signature solution

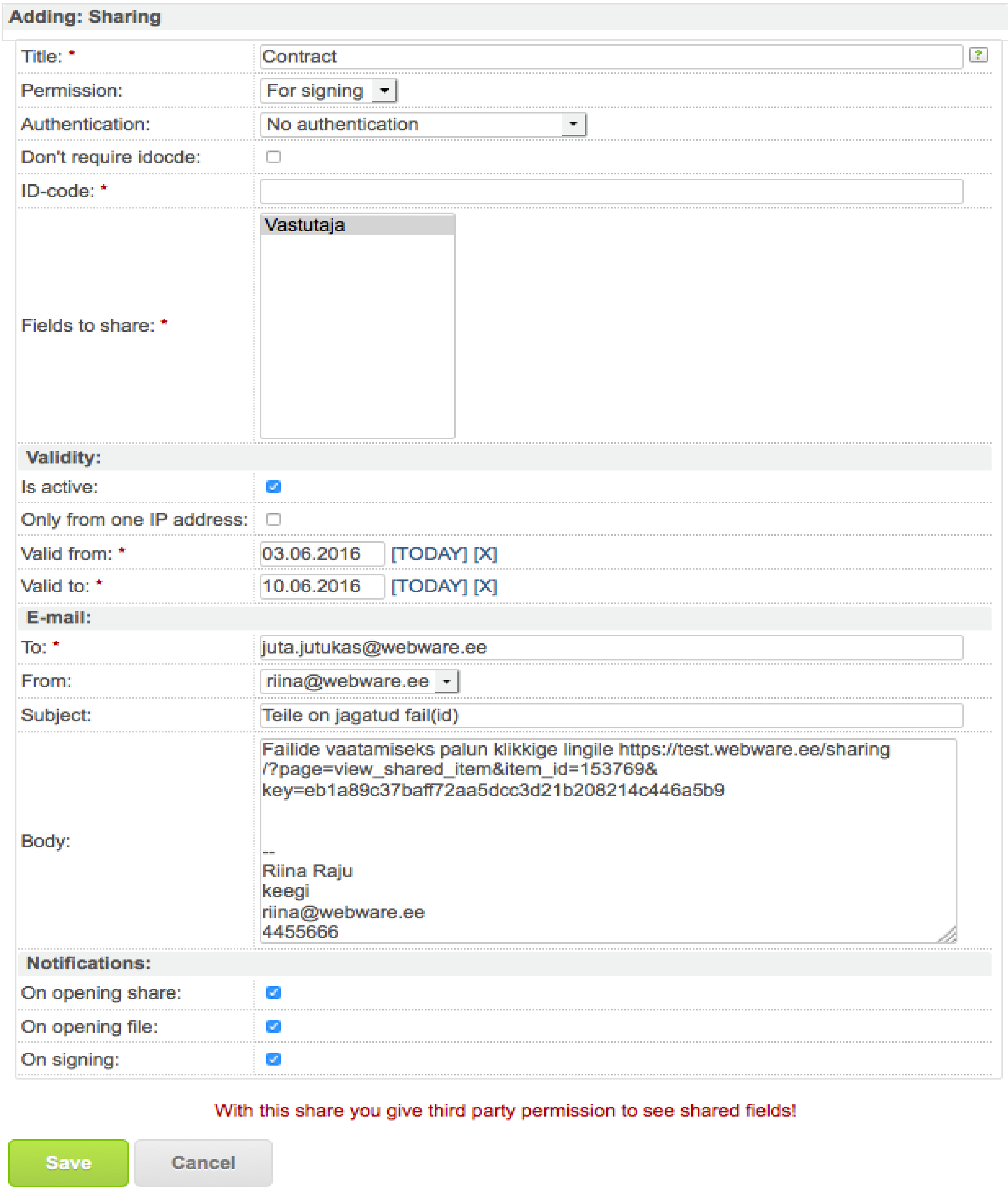
For what?

- In WebDesktop it is possible to share each document by e-mail with 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 it.
- The person who shares a document receives an e-mail notification on all the activities of the party.

How to use?

1. Click on the “Share” button in the row of buttons in the upper part of the document.

2. You are taken to the document sharing window where you can make the following choices:
    a. **Title** – description of the reason for sharing and the person(s) who it is shared with.
    b. **Access** – you can choose whether a third party can merely access the document in terms of data fields (**“For viewing”**) or also sign the file (**“For signing"**).
        i. In the case of the status **“For signing"**, the following additional fields are created:
            1. **Do not require personal ID code** – the personal identification code is not required, all persons whom the document link has been sent can sign;
            2. **Personal ID code** – only designated persons can sign the document (personal ID codes must be separated by a comma). If the personal ID codes of multiple persons are added to the personal ID code field, multiple persons can sign the document. The personal ID code is not required if authentication has not been prescribed.
    c. **Authentication** – does reaching WD require authentication of the user (by “ID card” / “Mobile ID”) or not (“Unauthenticated”). Upon authentication, the names of the commentators of the documents are displayed.
    d. **Shared fields** - from which fields you wish to share information.
    e. **Is active** – whether the document is active for sharing.
    f. **Only from one IP address** - whether the document can be opened only from one IP address or from multiple IP addresses.
    g. **Valid from / Valid until** – during which period it is possible to open the link.
    h. In the **e-mail window** you can adjust to which e-mail address the document will be sent (**“To”**), from which e-mail address (**“From”**) and what is the subject of the e-mail message (**“Subject”**) and the content of the message (**“Content”**).
    i. **Regarding notices** it is possible to adjust whether you as the sharer will be sent an automatic notification when a third party **opens the e-mail** message and/or **opens the file** and/or **signs the document**.

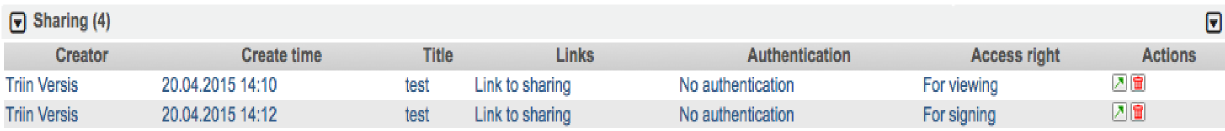

Adding: Sharing

Title: *	Contract
Permission:	For signing
Authentication:	No authentication
Don't require idocde:	☐
ID-code: *	
Fields to share: *	Vastutaja
Validity:	
Is active:	☑
Only from one IP address:	☐
Valid from: *	03.06.2016 [TODAY] [X]
Valid to: *	10.06.2016 [TODAY] [X]
E-mail:	
To: *	juta.jutukas@webware.ee
From:	riina@webware.ee
Subject:	Teile on jagatud fail(id)
Body:	Failide vaatamiseks palun klikkige lingile https://test.webware.ee/sharing/?page=view_shared_item&item_id=153769&key=eb1a89c37baff72aa5dcc3d21b208214c446a5b9 -- Riina Raju keegi riina@webware.ee 4455666
Notifications:	
On opening share:	☑
On opening file:	☑
On signing:	☑

With this share you give third party permission to see shared fields!

Save Cancel

3. After filling in the document sharing window, click on the “Save” button and thereafter an e-mail notification will be sent (e.g. to the mandatary).
4. In the sharing block at the end of the WD entry you can see whether the sharing notification has been sent outside the system.

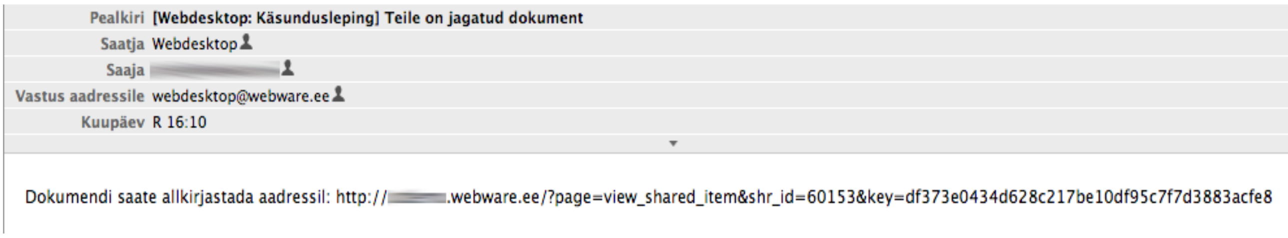

Sharing (4)

Creator	Create time	Title	Links	Authentication	Access right	Actions
Triin Versis	20.04.2015 14:10	test	Link to sharing	No authentication	For viewing	
Triin Versis	20.04.2015 14:12	test	Link to sharing	No authentication	For signing	

What does a third party see?

Here you will find a brief guideline on what to send to a third party.

5. The third party receives the following e-mail notice (the content of the message depends on the sharing notice drawn up in WD):



6. By clicking on the link in the e-mail message, the document opens immediately (without authentication) or authentication is required (using an ID card or Mobile ID).

   a. If the authentication of the third party is set up regarding sharing, the authentication option window opens (ID card/Mobile ID).

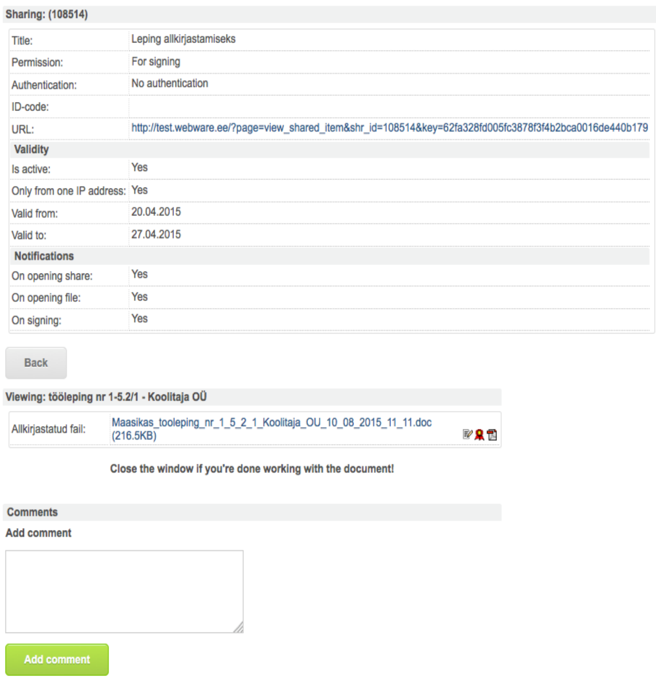
   b. Upon authentication using Mobile ID, you need to enter the mobile telephone number and PIN1. Upon authentication using the ID card, you need to enter PIN1 of the ID card.

7. The shared document viewing window opens.

   - **If the document is shared for signature**, the “Add signature” button is displayed in the filer row. If only the viewing right has been granted regarding a document, there is no signature button.

   - **If a document has been shared with multiple persons at once and if one person is currently in the process of signing it**, the lock icon is displayed to the others next to the file and there are no signing buttons (yellow folder and “Add signature”).
     kasundusleping_ww.bdoc (91.4KB)
     For further information on locking files, see here.

   - If necessary, a third party can add a comment on a document. The date, time and IP address is displayed regarding the comment.



How to find a document shared from WD?

Identifying a shared document based on the sharing ID in the link

Identification of a document shared from WD may be needed if, for instance, the "valid until" date of the shared entry has expired and the third party declares that the sharing link no longer opens.

1. To find the document, ask the third party for the URL address and from this address take the item id (given in the example) and enter it into the search window in the top bar. Add **"#"** in front of the item ID.

   ```
   ?page=view_shared_item&item_id=108404&key=de687427f4001e92ea88b9c860411715d3191857
   ```

2. The shared document opens.

Searching for a shared document in the object search

In the detailed search form of the object search you can search for shared documents based on the activeness status, sharer, time of sharing, title, access, authentication and personal identification code.

1. Choose **"Search"** → **"Object"**.
2. In the search window, click on the **"Detailed search"** button.
3. Upon the block **"Sharing"** and draw up a suitable search.
4. Click **"Search"**.

<u>Brief sharing guideline which you can send to a third party:</u>

Viewing / sharing a document

Viewing

1. To view a document, click on its file name.
2. You can add comments if you wish. Enter the comment and click Add comment .

Signature

1. Click on the Add signature button in the file row.
2. The signature window opens. Choose the manner of signature and click Continue >> .
3. Enter PIN2.
4. If necessary, you can add a comment on the document Add comment .

> If a document has been shared with multiple persons at once and if one person is currently in the process of signing it, the lock icon is displayed to the others next to the file. kasundusleping_ww.bdoc (91.4KB) There are no signing buttons (yellow folder and "Add signature").

Descriptions of icons and buttons

In the system, you will find the following icons. If you move the cursor over an icon in WebDesktop, the functionality of the button will be displayed.

Icon	Activity
	Search
	Favourites
	View
	Change
	Delete
	Create a DigiDoc document
	Add new
	Restore
	Create a pdf document
»	Transfers selected members
«	Transfers back selected members
*	Mandatory field

Desktop

After login, you are taken straight to the desktop view where there is most of the information essential to the user. To adjust the desktop settings, choose “Management” → “Settings” from the top menu.

Top bar

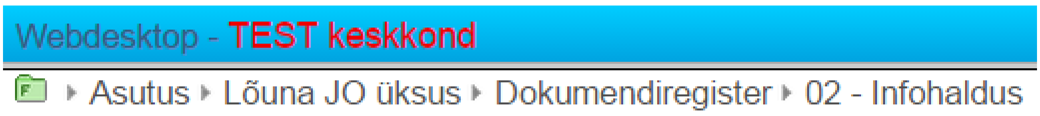
The top bar contains the following: the search window; icons “Favourites”, “Front page”, “Help” and

“Info”; language selection icons; the date and time; the username; and the logoff button.

Adjustment of date and time

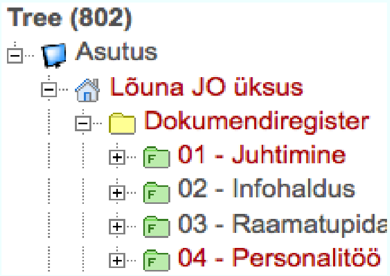
You can adjust whether the top bar shows the date or not. To adjust the settings, choose “Management”→ “Settings” → tick the desired cells “Show date in top bar” and/or “Show time in top bar”.

Path



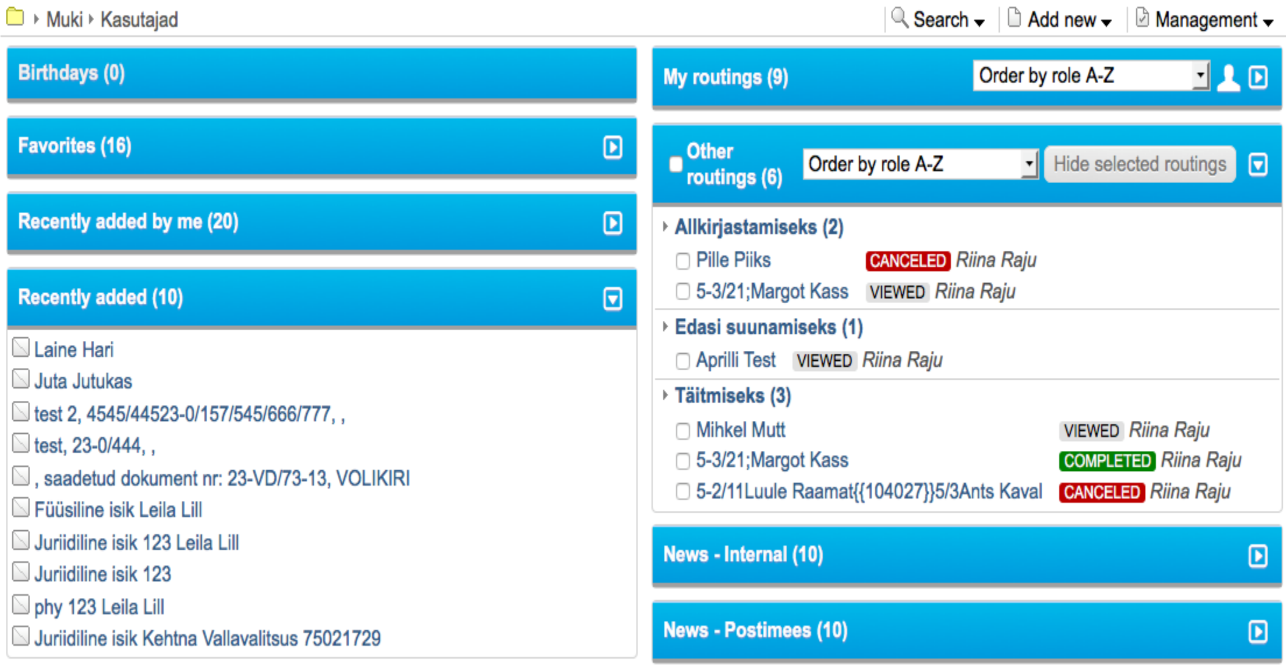
The path is located directly under the top bar and shows the current location in the structure tree. For instance, in the given example, the location is under the Southern JO unit in the register of documents under the “Information management” functions.

Compare the information management function given in the path with the location shown in the tree.



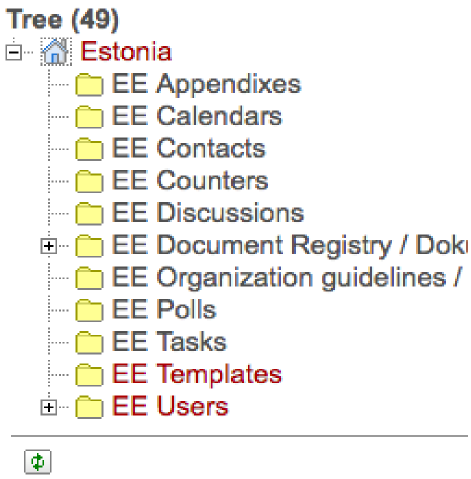
Front page

Information necessary for the user's everyday work is gathered on the front page of the desktop.



Recently added objects and documents not made by the prescribed date

You can determine whether your front page shows the blocks "Recently added by me", "Recently added" and "Documents not made by prescribed date".



1. Choose "Management" → "Settings" from the top menu.
2. If necessary, tick the cells "Show recently added objects on front page" and/or "Display overdue documents in separate block on front page".

Tree

All the objects/documents entered in the system are located in the tree. The tree is located on the left side of the desktop and is usually closed. The tree is not meant for daily use, but its goal is to make the activities of the administrator easier. How many objects are shown to an ordinary user depends on the access rights. An ordinary user sees the information "You do not have the right to display interim levels" in the tree in the case of folders located in a folder to which the user has no rights.

How to use?

1. To open the tree, click on the left border frame of the desktop.
2. To open tree folders, click on the “+” icon.

Menus

There are three menus in the upper right-hand corner:

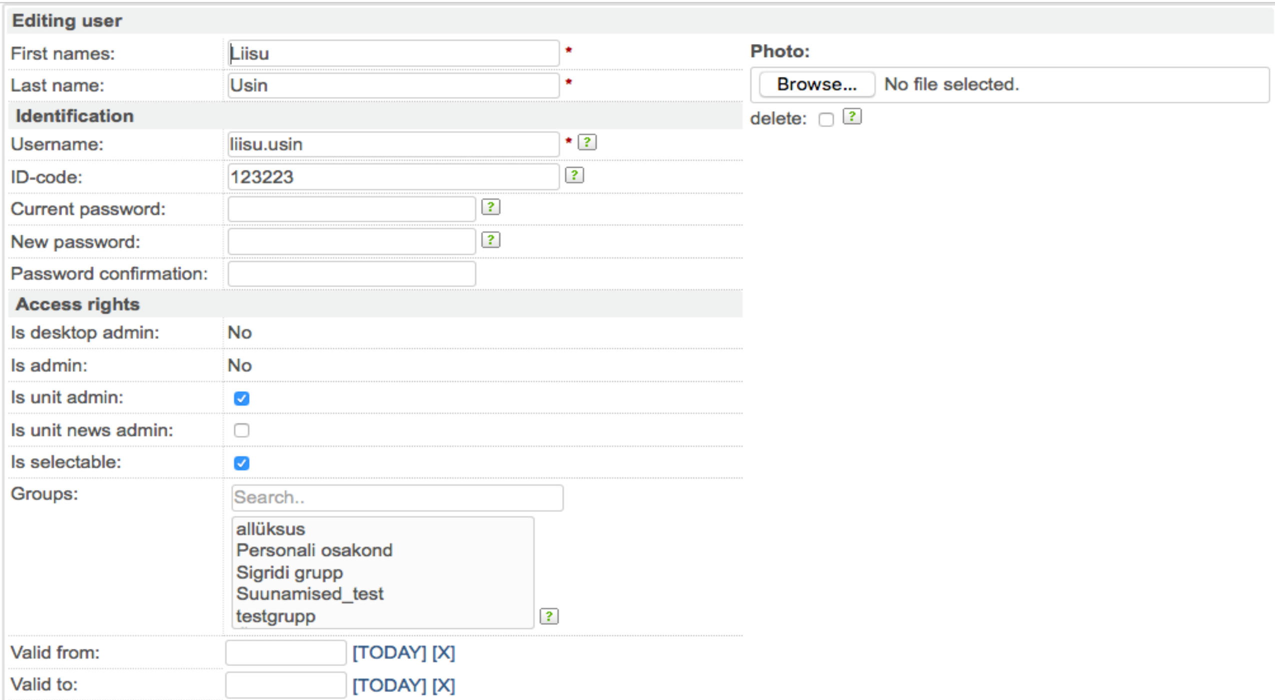
- “Search” – for searching for information;
- “Add new" - for adding information;
- “Management” – for management of information and changing some settings.

User information and personal settings

User information

If necessary, you can change information on your user account card.

1. For that purpose choose the top menu **“Management”** → **“My info”**.



2. The window “Change user info” opens. There you can change the following settings:
   - **Photo** – you can add a photograph of yourself;
   - **Personal identification code;**
   - **Active password** – the active (old) password is asked upon changing the password if you have entered the system based on your username and password. Upon entering the system using an ID card or Mobile ID, the active password is not asked;
   - **New password** – the new password must be at least eight characters long and contain at least one uppercase letter and one number;
   - **Password again** – enter the new password again;
   - **E-mail**;
   - **SMS e-mail;**
   - **Telephone 1;**
   - **Telephone 2;**
   - **MOBILE PHONE;**
   - **Fax;**
   - **Away** – if ticked it means that you are away from office and all document routings are

forwarded to your substitutes;

- **Away until** – the date until which you are away from office;
- **Substitute** – the person whom routings are forwarded;
- **Substitute's routing roles** – routing roles forwarded to the substitute;
- **Job title** – the user's job title;
- **Structural unit** - the user's structural unit;
- **Other information** – additional information field.

3. Once all changes have been made, click on the "Save" button.

Personal settings, incl. adjustment of the settings of the front page

To change your personal settings in WebDesktop, choose **"Management"** → **"Settings"**.

General

- **Show alphabet bar in lists, where possible** - in the list view, the alphabet bar is displayed and it provides for an additional filtering option in the case of text type fields.

- **Show date in top bar** - the date is displayed in the top bar (for further information, see here).
- **Show time in top bar** – for further information, see here.
- **Show recently added objects on front page** – for further information, see here.
- **Show overdue documents in separate block on front page** - for further information, see here.
- **Number of rows shown in lists** – you can choose how many entries are displayed in the list view (5-200 entries in the selection). Next (20) »»»
- **E-mail (IMAP) server.**
- **IMAP port.**
- **SSL (TLS) mandatory.**

Look

You can choose the colour scheme of entire WebDesktop.

News

You can choose whether internal news, Postimees's news or both are shown on the front page. To choose multiple items, use the CTRL key.

Unit news

You can choose which unit's internal news is displayed on your front page.

Calendar

You can make additional adjustments to calendar settings.

- Weekdays.
- Active time.
- Keep the day planner open.
- Keep the planner open before the active time – related to the aforementioned field "Active time".

E-mail signature

In the free-format text field of personal settings ("Management" → "Settings" → "E-mail signature"), you can set a personal signature that is used for sending and sharing e-mail from WD.

Time planning

There are the following time planning opportunities in WebDesktop:

- calendars;
- tasks.

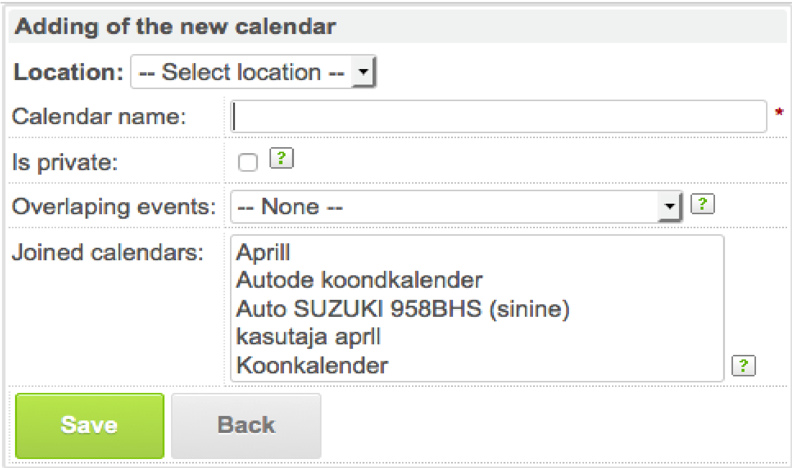
Calendars

For what?

General calendars (e.g. birthday calendar or holiday calendar) as well as personal calendars (e.g. employee's meeting calendar) can be created in WebDesktop. Calendar events are displayed on the user's desktop ("Birthday calendar") and in "Calendar events" blocks. If necessary, you can add calendar events of the same type, which are located in different calendars.

How to use?

Adding a calendar

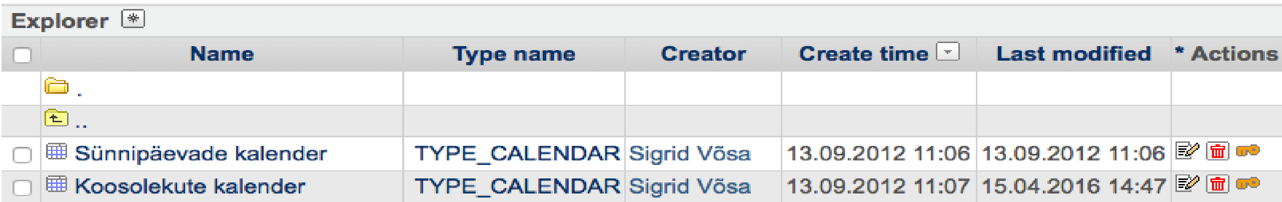


1. Add a calendar. Choose „Add new" → "Calendar" in the top menu.
2. The calendar addition window opens.
   a. Give the calendar a name.
   b. Tick the "Is private" field if you create the calendar for personal use.
   c. The created calendars can be merged. To do that, choose in calendar A which events are to be transferred from calendar B. Thereby, in calendar B from which the events will be transferred, the events of calendar A are not displayed.
   d. If you have made the choices, click on "Save".

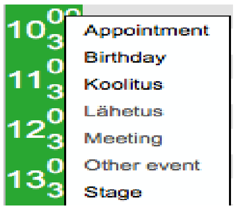
In general, the addition of calendar events takes place similarly, but due to certain small nuances we give instructions regarding the birthday and other type of calendar events separately.

Addition of a calendar event (excl. birthday)

Find the created calendar. Choose the top menu "Management" → "Calendars" and click on the name of the created calendar.

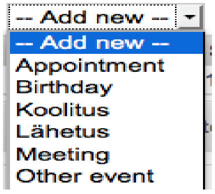


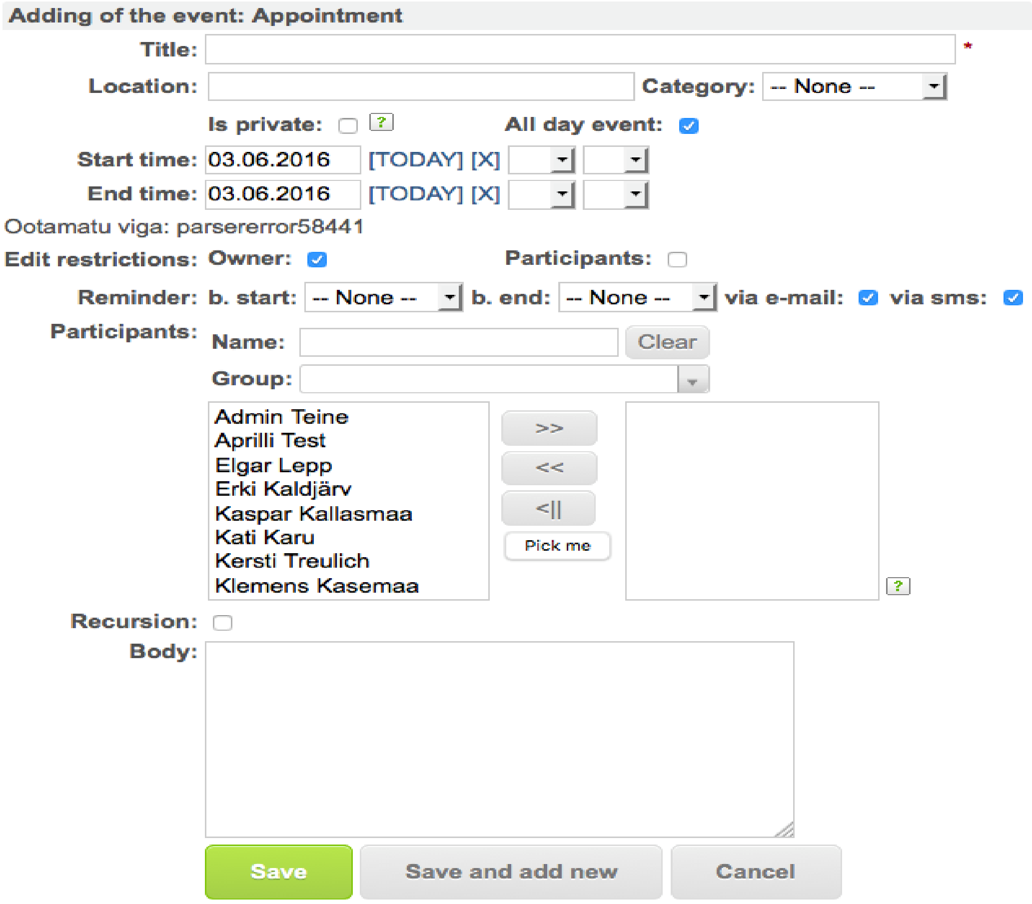
1. There are two ways for adding an event:
2. Make a left-click or a right-click (depending on the browser) on the times indicated against the green background so that the event addition selection is opened. Click on the desired event. **PLEASE NOTE: If the calendar is, for instance, in the month view, click on the desired date first and then on the time.**



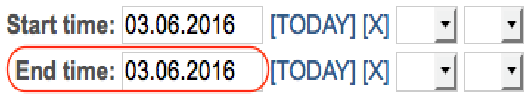
3. If you use the calendar in the list view, choose "Add new" from the upper left-hand corner.

4. The event addition window opens and is pre-filled to a certain extent.
5. In the title field, enter what you wish to display on the desktop in the calendar events block.



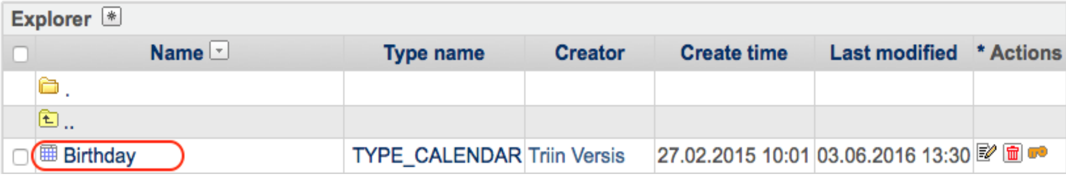


6. In the location field, you can add information on which geographical point the event will take place in.
7. If you tick the “Is private” field, the event will be displayed only to the person who added it. In order to display the event to all employees, the tick should not be made.
8. Tick the “Whole-day event” field if it really is a whole-day event.
9. The field “Starts at" is filled in automatically. The start time is related to reminders.
10. The cell “Ends at” contains the final date of the event reminder.
11. In the change restrictions you can choose who can change the event: either the person who added it (owner), participants or both. If you want, you can adjust the estimated e-mail or SMS reminder time.
12. In the “Participants” block you can specify the people who will get a notification by e-mail or SMS. **PLEASE NOTE: In order to display the calendar event on the user’s desktop, the user must be added as a participant.**
13. If you tick the field “Repetition”, you can mark the event as recurrent. Let us assume that we want to make an event that takes place between 1 April 2014 and 29 April 2014 a weekly event. To that end, we need to indicate the end date of the event. Otherwise the event will not be repeated in the calendar.

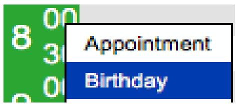


14. The “Content” field allows for adding clarifying information.
15. If the information on the event has been inserted, save the event.

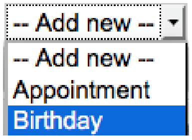
Adding a birthday



Find the created calendar. Choose the top menu “Management” → “Calendars” and click on the name of the created calendar.

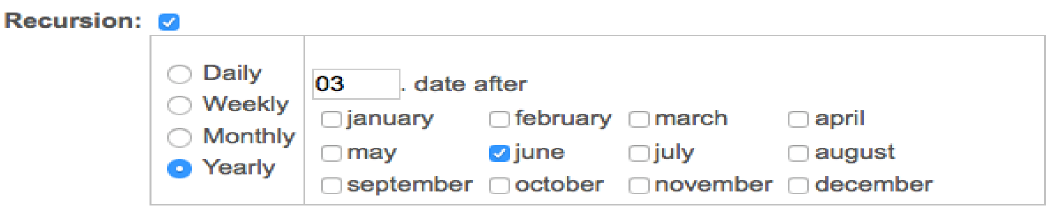


1. There are two ways for adding a birthday:
   a. Make a left-click or a right-click (depending on the browser) on the times indicated against the green background so that the event addition selection is opened. Click on the desired event.
   b. If you use the calendar in the list view, choose “Add new” from the upper left-hand corner.



2. In the title field, enter what you wish to display on the desktop in the birthday block.
3. In the location field, you can add information on which geographical point the birthday will take place in.
4. If you tick the “Is private” field, the birthday will be displayed only to the person who added it. In order to display the birthday to all employees, the tick should not be made.
5. The “Whole-day event” cell must be ticked and even the desktop administrator cannot remove the tick.

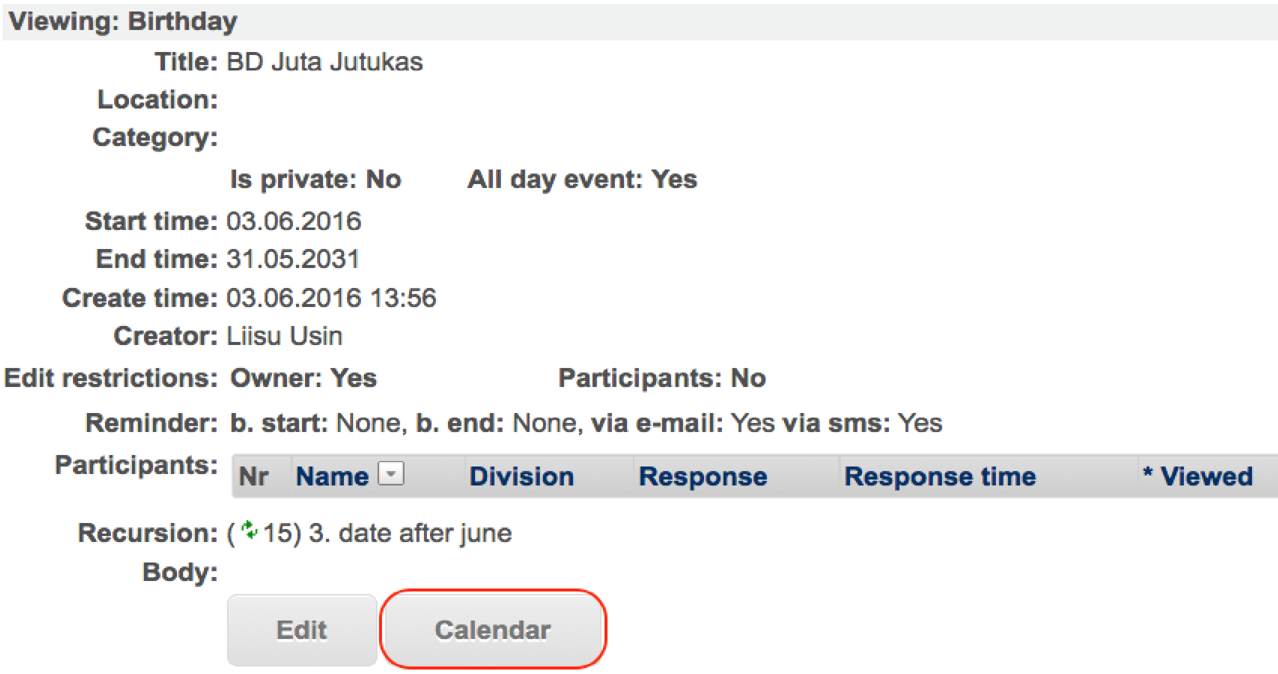
6. The field “Starts at" is filled in automatically. The birthday is displayed to the user on the front page one day before the birthday, on the birthday and one day after the birthday. The start time is related to reminders.
7. The “End” cell contains the birthday reminder end date. It is 15 years later than the start time.
8. In the change restrictions you can choose who can change the birthday data card: either the person who added it (owner), participants or both. If you want, you can adjust the estimated e-mail or SMS reminder time.
9. In the “Participants” block you can specify the people who will get a notification by e-mail or SMS. **PLEASE NOTE: Adding participants does not affect the birthday displayed on the front page, i.e. the birthday is also displayed to the users if they have not been indicated as participants.**

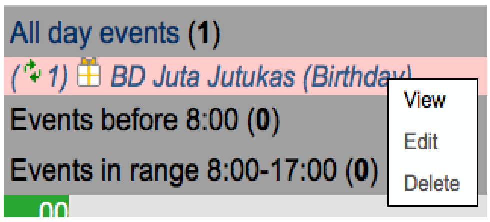


10. The pre-ticked field "Repetition" can remain ticked. As a result, the birthday is displayed on the front page again next year.
11. The “Content” field allows for adding clarifying information.
12. If the required data has been inserted, save the birthday.

Calendar event list view and viewing an event

To see all calendar events in the list view, move to the calendar in the structure tree (located right under the top bar). If you click on the event name, the event card opens and there you see more detailed information (title, location, start time, end time, time of creation, etc.).





1. By clicking on the “Calendar” button, you can move to the calendar view.
2. If you make a right-click on the event, you can view, change or delete the event.

Tasks

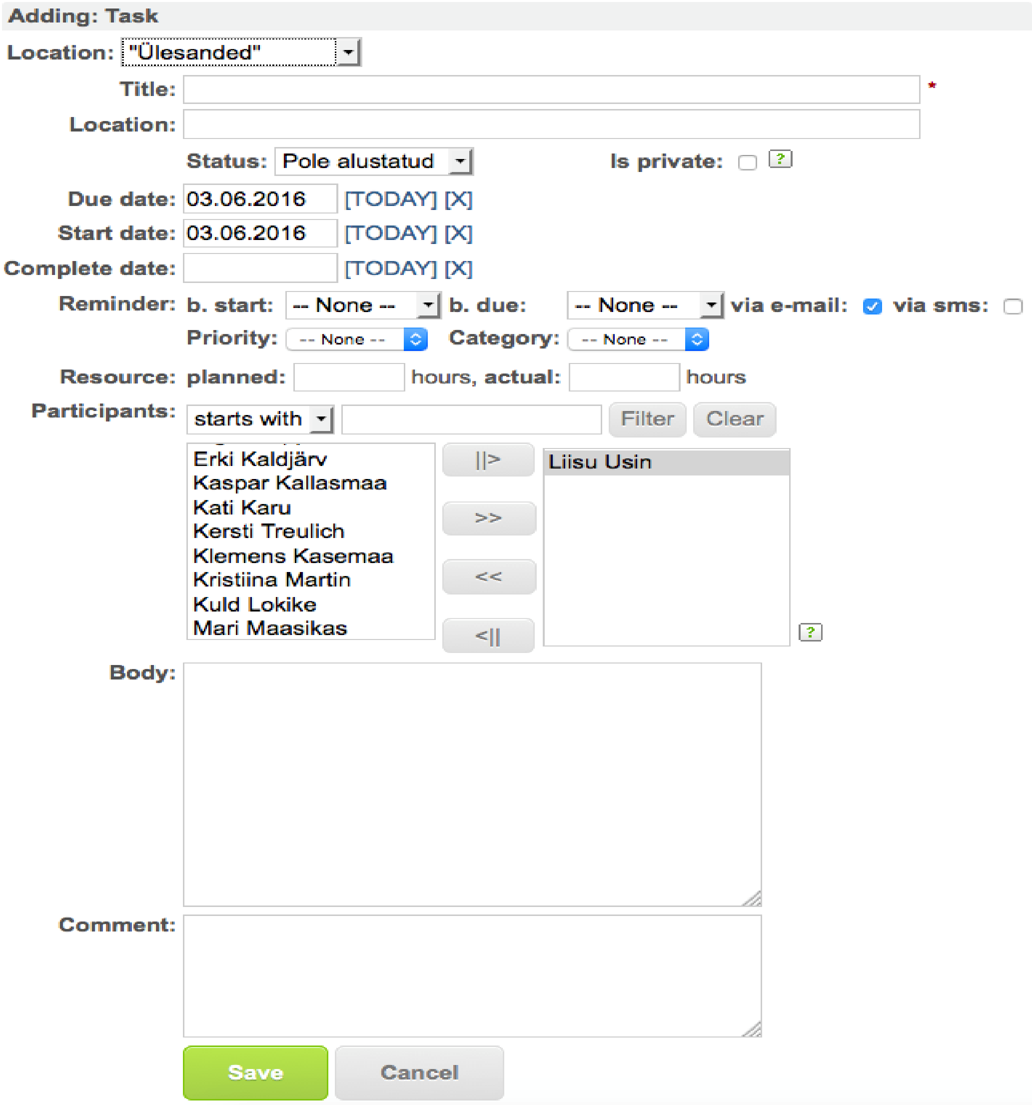
For what?

The task management module is meant for sharing simple one-off work tasks, e.g. “Replacement of toner”.

How to use?

1. Choose “Add new” → “Task” in the top menu.
2. The task addition window opens.
3. In the title field, enter what you wish to display right on the user’s desktop, e.g. “Water the plants”, etc.
4. In the location field, you can add information about where the task must be performed (e.g. the meeting room, etc.).
5. By default, the task status is “Not started”. The status of every task must reach the "Done" status. After that the task is no longer displayed on the user’s desktop.
6. If you tick the “Is private” field, the task will be displayed only to the person who added it. In order to display the task to all employees, the tick should not be made.
7. Closing date – the date by which the task must be performed.
8. Start date – the opening date of the task, which is related to reminders.

9. Terminated – the date of completion of the task. If the user indicates a task as completed, the “Completed” field will be filled in automatically.



10. Reminder:
    a. before start – related to the start date field;
    b. before closing date – related to the closing date field;
    c. by e-mail – ticked by default; an e-mail notice is sent to the e-mail address indicated in the user card;
    d. by SMS – to send an SMS, the SMS field must be indicated in the user card.
11. Priority – pre-set priorities.
12. Category – pre-set categories.
13. Resource – the person who inserted the task can predefine the planned time spent; after performing the task, the person who performed it can indicate the actual time spent.
14. Participants – in order to display the task on the user's desktop, the user must be added as a participant.
15. Content – you can add additional information about the content.

Favourites

For what?

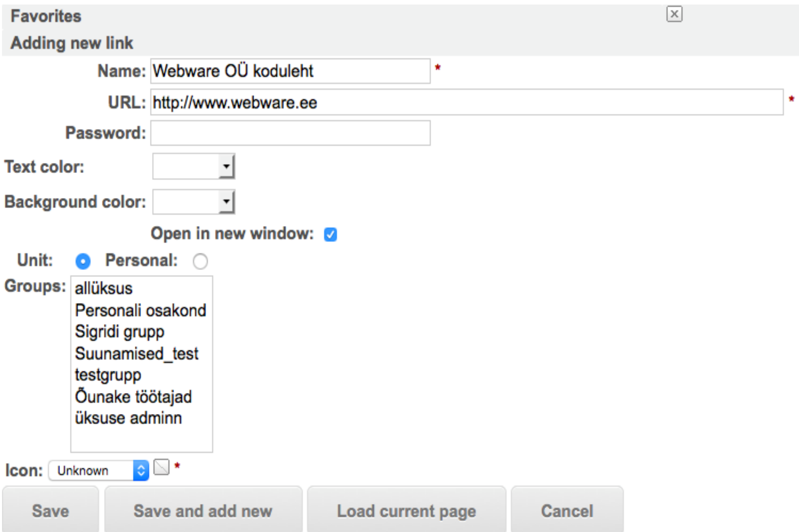
Favourites are a WebDesktop module that allows for saving to the WebDesktop environment references to the internal resources of WebDesktop (calendars, registers, etc.) as well as to external resources (links to external websites). Favourites are displayed on the front page in the “Favourites” block. Each user can add their personal favourites to their front page.

> The desktop and unit administrators have the right to add favourites for the users of the desktop or users of the entire unit, respectively.

How to use?

Adding an external link

1. To add a favourite, click on the icon in the top bar.
2. In the favourites window, select “Add new”.
3. A new favourite addition window opens. Fill in the required fields there.
   a. Copy the address of the desired website to the URL field.
   b. Since ordinary users can only add a favourite for themselves and it is not displayed to the system administrator, the adding of a password does not provide for any extra functionality.

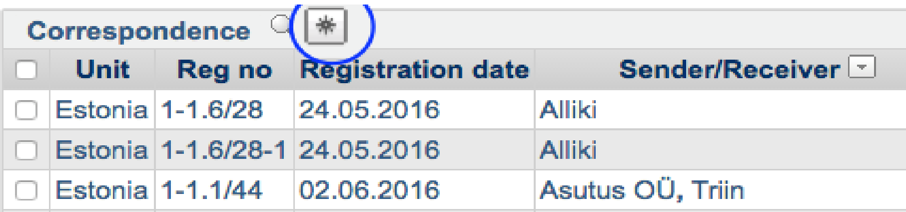


   c. The text colour is displayed on the front page in the favourites block.
   d. The background colour is displayed on the front page in the favourites block.
   e. If you wish that a link that can be clicked in the favourites block is opened in a new window, tick the field “Open in new window”.
   f. The icon is displayed in the top bar if a favourite is added to the WebDesktop top bar. To add a favourite to the top bar, go to the favourites view and click on the icon (“Add to top bar”) next to the favourite.

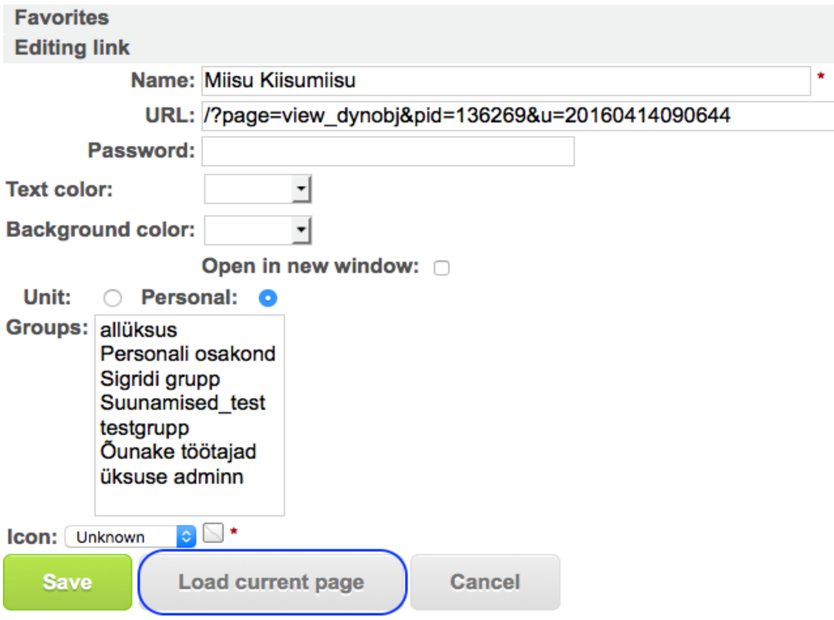
Adding an internal link from the header of the list view and from the entry view form

A link within WebDesktop can be added to the list for personal use in the fastest way via the favourites icon in the list header and from the entry view form .

1. To that end, perform a search or open the entry view form.
2. In the list view of the search results or in the entry view form click on the favourites icon. Once the asterisk turns active (yellow), the favourite has been added to the front page.



Adding an internal link from the top bar



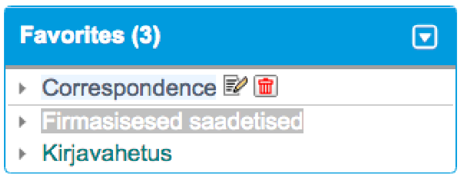
1. First, go to the location in WebDesktop which you wish to add as a favourite. For example, it may be necessary to have a direct link to the correspondence register on the front page.
2. When you have opened the correspondence register, click on the favourites icon in the top bar.
3. Click on the "Add new" button.
4. In the new favourite addition window, click on the button “Load active page” in the upper part of the window.
5. The name and URL fields are filled in automatically.
6. If necessary, make modifications (see the section on adding an external link) and save the favourite.

Changing / deleting favourites

There are two options for changing and deleting favourites:

1. on the front page using respective buttons;
2. in the top bar via the favourites icon .

Changing and deleting favourites on the front page



1. In the favourites block, move to the name of the favourite and click on either the “Change” or “Delete” button.
2. Upon deleting a favourite, an additional confirmation is asked. You cannot change or delete favourites saved by the administrator.

Changing and deleting favourites via the top bar

1. Click on the icon in the top bar.
2. There are “Change” and “Delete” buttons in the “Actions” column in the favourites list view and you can change or delete a favourite using them.

Creating a survey

For what?

The survey module allows for compiling anonymous as well as personalised surveys using text boxes and multiple-option cells. An active survey is displayed on the user’s front page in a special block. An administrator and an ordinary user who belongs to the survey editors group can create a survey.

How to set up the survey editors group?

You can set the survey editors group in the desktop settings.

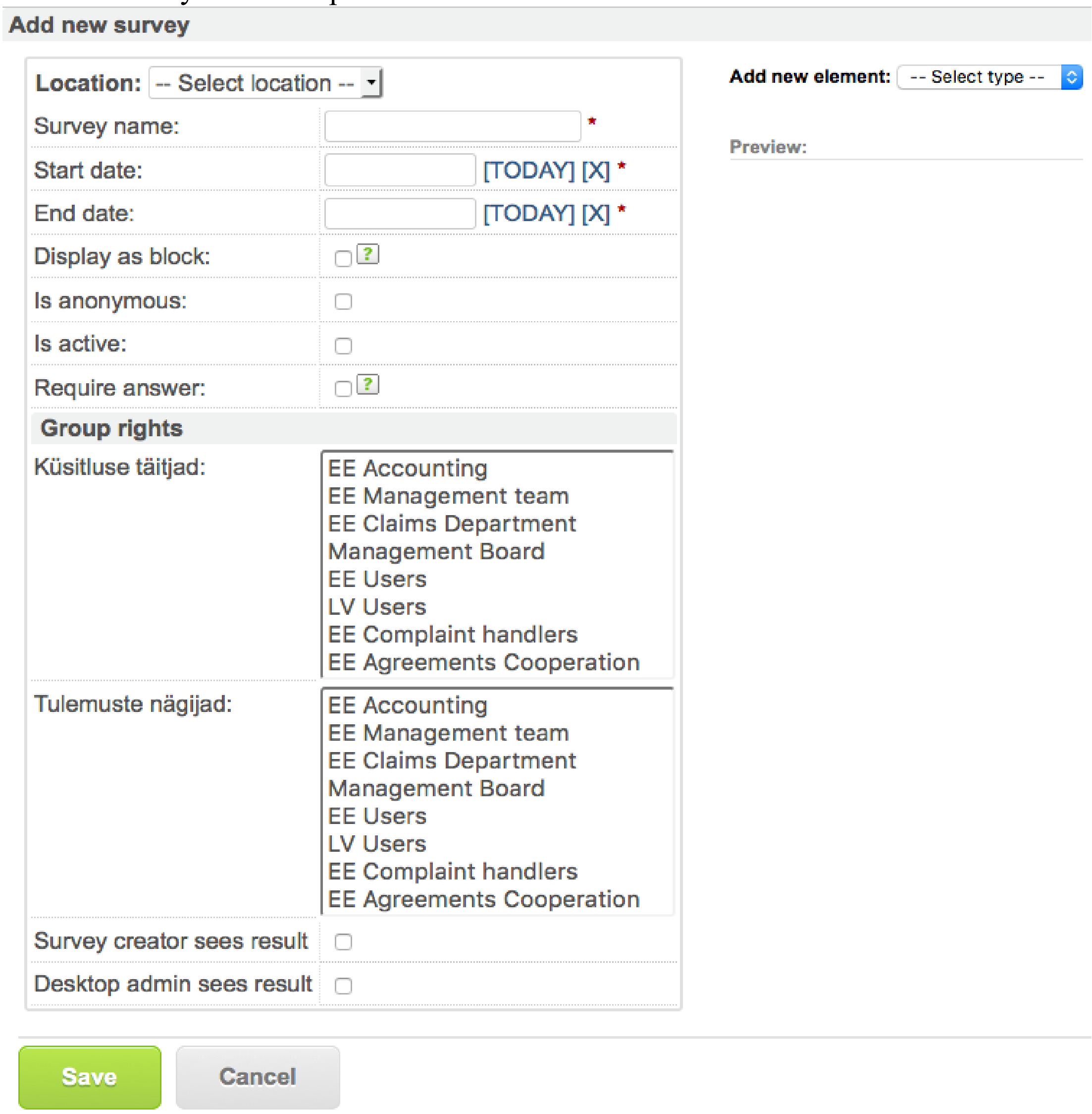
1. Add a new group for survey editors if there is no suitable group yet.
2. Choose “Management” → “Desktop admin” → “Desktop”.
3. Click on the green “Change” button.
4. Choose the survey editors group for the “Survey managers” field. Click on “Save”.

How to draw up a survey?

> Surveys must be activated from the configuration file. To activate a survey, contact the user support of WebDesktop.

1. To add a survey, choose “Management” → “Surveys”.
2. The (existing) surveys list view opens and in there click on the 

button.
3. The new survey window opens.



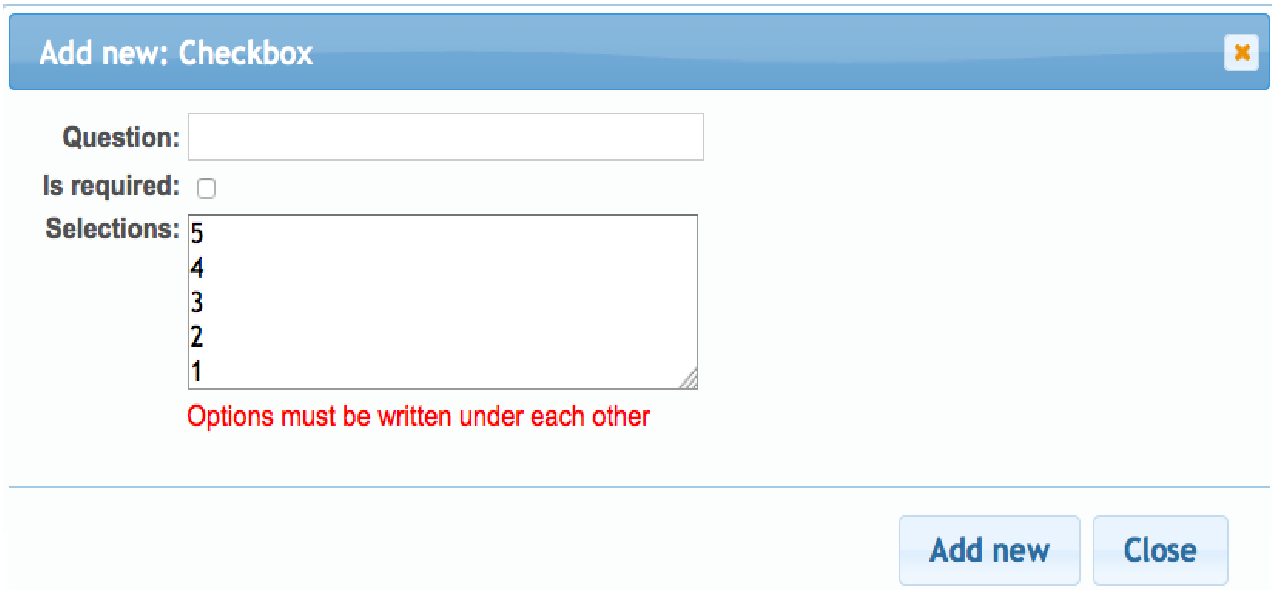
You can adjust the following:

- Name – the name of the survey.
- Start date – the first date of displaying the survey to the respondents.
- End date - the final date of displaying the survey to the respondents.

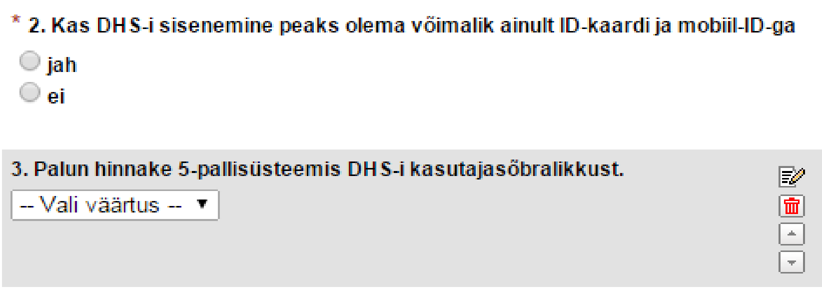
- Display as front page block – determines whether the survey is displayed on the front page of the employees who are set as survey respondents via the group rights.
- Is anonymous – if the survey has been designated as anonymous, the viewers of the results cannot identify the respondents.
- Is active - the survey must be designated as active in order to display it on the front page.
- Ask for reply – if "Ask for reply" has been ticked, the results will not be displayed to the user if the user has not answered yet.
- Survey respondents – the group on whose front page the survey is displayed.
- Viewers of results – the group that sees the results of the survey.
- Survey creator sees result – if ticked, the creator of the survey has the right to see the results.
- Desktop admin sees result – if ticked, the desktop administrator has the right to see the results.

Adding questions

1. To add a question, choose "Add new element". Choose the survey field type:
   - text cell – free-format text field;
   - radio button – choice between two values, e.g. Yes/No;
   - marking box – pre-defined list of answers as tick boxes;
   - list box – selection of pre-defined responses as a drop-down list.
2. For instance, in the case of a list box field type the following window opens:
   - Required – the question must be answered;
   - write your responses below one another;
   - Once the question has been made, click on the "Add new" button.



3. To change a question, the order of questions and/or delete a question, move the cursor on the added question so that it will be displayed against a dark grey background.
   - - change the question;
   - - delete the question;
   - - change the order of questions.

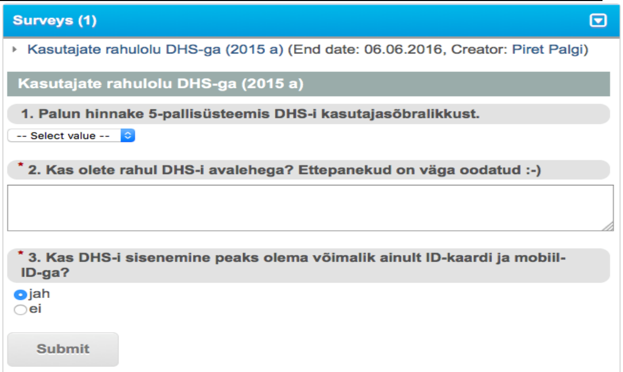


There is a survey on the front page if it is active and contains at least one question.

How to answer a question?

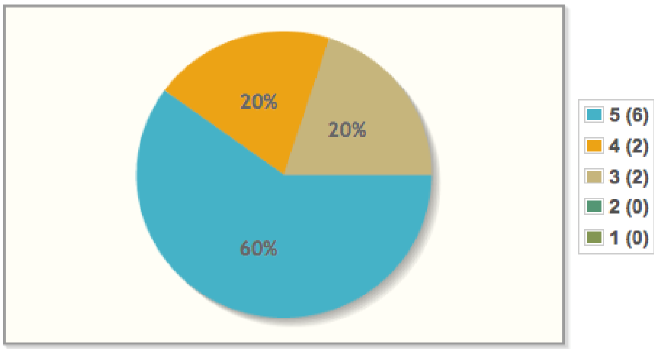
You can answer a question via the front page.

1. Write your answers here and click “Reply”.
2. The system asks for an additional confirmation. If you do not wish to change the responses, click “OK”. If you wish to make changes, click on “Cancel”.
3. If you have confirmed your answers, you will be directed to the aggregate page.



Results: Kasutajate rahulolu DHS-ga (2015 a) (Total poll replies: 10)

1. Palun hinnake 5-pallisüsteemis DHS-i kasutajasõbralikkust. (Replies: 10)

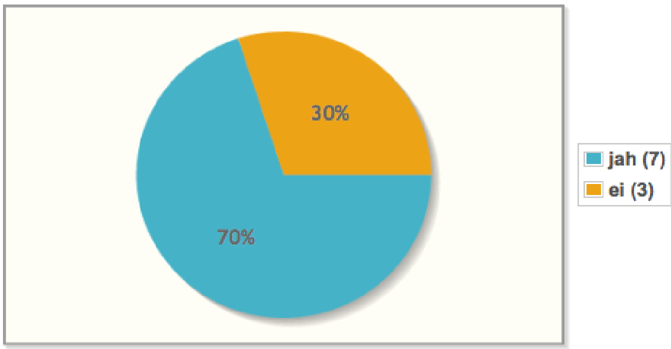


2. Kas olete rahul DHS-i avalehega? Ettepanekud on väga oodatud :-) (Replies: 10)

Näita 10 kirjet Otsi: ja

Survey participant	Answered	Result
Anonymous	19.01.2015 15:28	Jah, olen. Suunamisplokid võiksid olla ühel pool nt vasakul pool.
Anonymous	19.01.2015 15:31	Jah
Anonymous	19.01.2015 15:33	jah

3. Kas DHS-i sisenemine peaks olema võimalik ainult ID-kaardi ja mobiil-ID-ga? (Replies: 10)



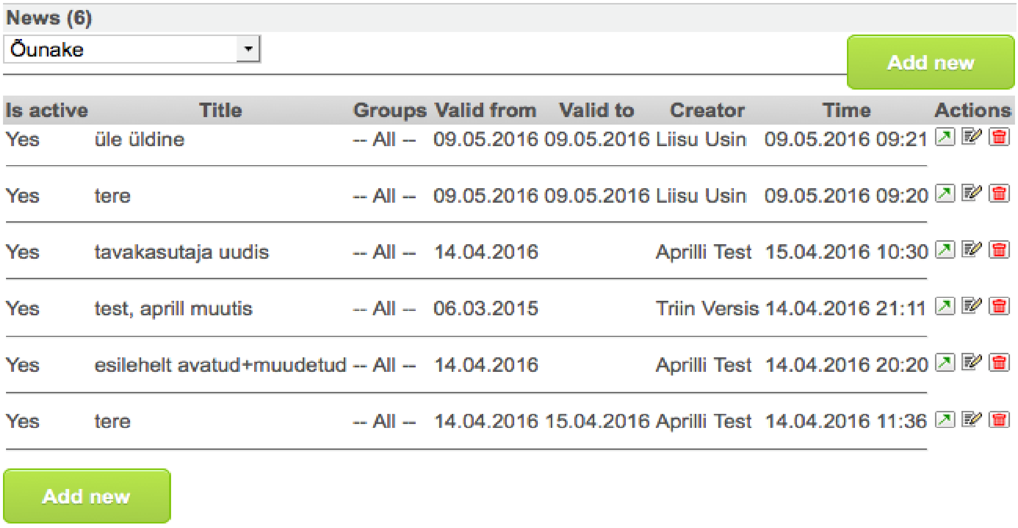
Back

News

How to add news?

The administrator can grant news management rights.

1. To add news, choose “Management” → “News”.



News (6)

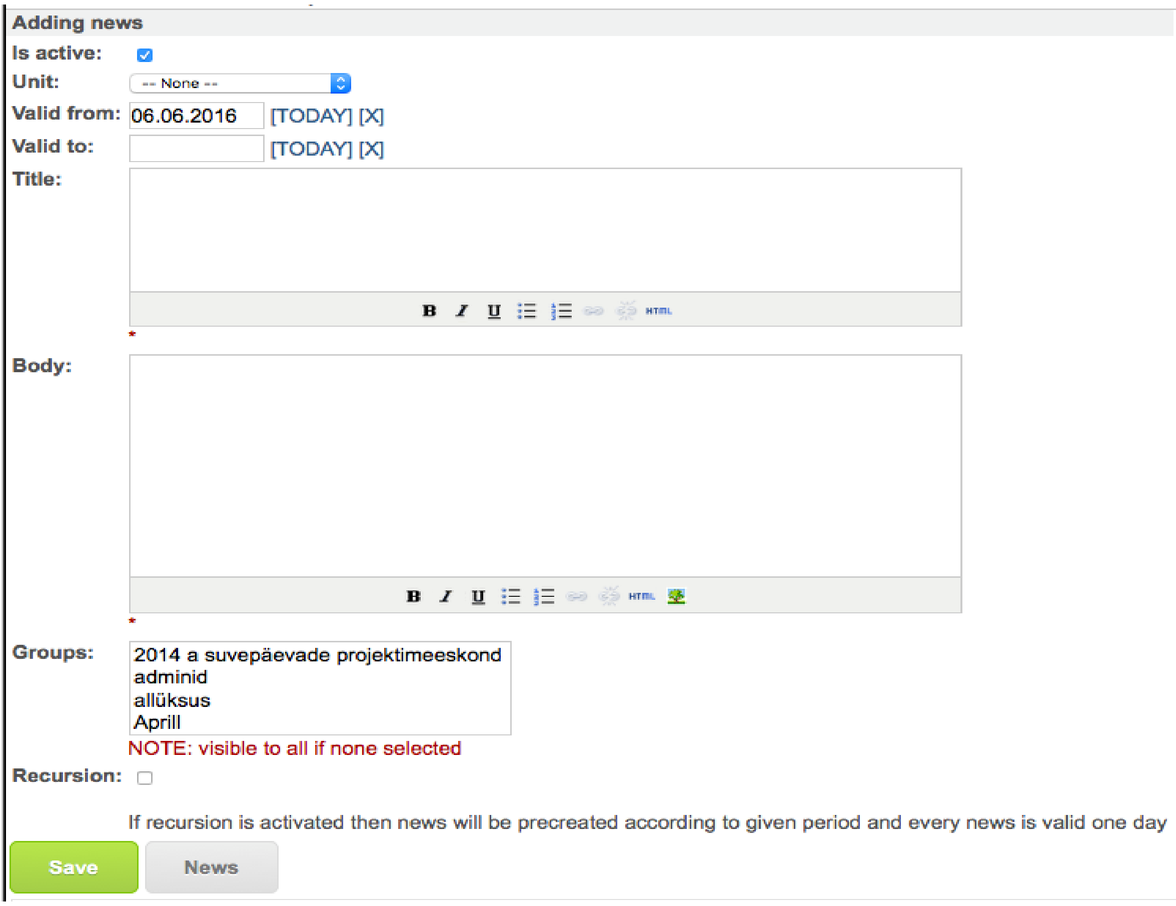
Õunake

Add new

Is active	Title	Groups	Valid from	Valid to	Creator	Time	Actions
Yes	üle üldine	-- All --	09.05.2016	09.05.2016	Liisu Usin	09.05.2016 09:21	
Yes	tere	-- All --	09.05.2016	09.05.2016	Liisu Usin	09.05.2016 09:20	
Yes	tavakasutaja uudis	-- All --	14.04.2016		Aprilli Test	15.04.2016 10:30	
Yes	test, aprill muutis	-- All --	06.03.2015		Triin Versis	14.04.2016 21:11	
Yes	esilehelt avatud+muudetud	-- All --	14.04.2016		Aprilli Test	14.04.2016 20:20	
Yes	tere	-- All --	14.04.2016	15.04.2016	Aprilli Test	14.04.2016 11:36	

Add new

2. Click on “Add new”.
3. The news addition window opens.
   - Is active – the news is displayed on the front page in the news block.
   - Unit – the news is displayed only on the front page of a unit.
   - Valid as of – the news is displayed on the front page as of a certain date.

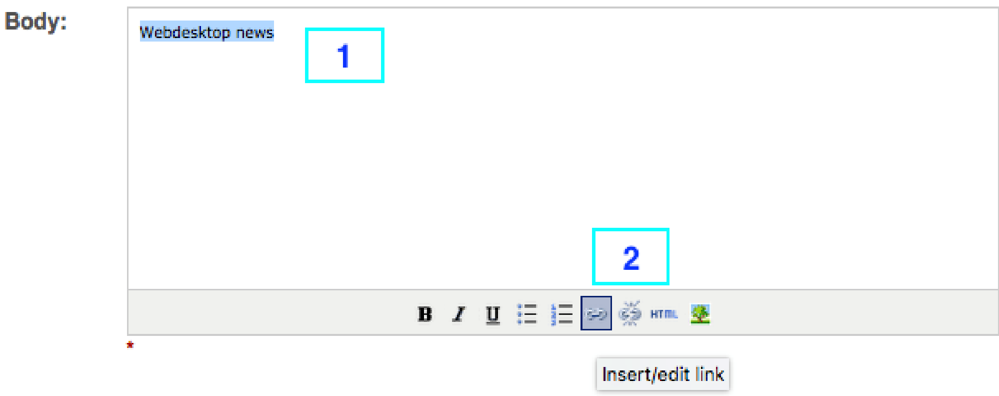


   - Valid until – the news is displayed on the front page until a certain date.
   - Title – the headline of the news.
   - Content – the entire content of the news.
   - Groups – the news is displayed on the front pages of users of a certain group.
   - Repetition – in the event of repeated news, you can specify in greater detail on what day and after which period the news is displayed on the front page again. If the repetition is

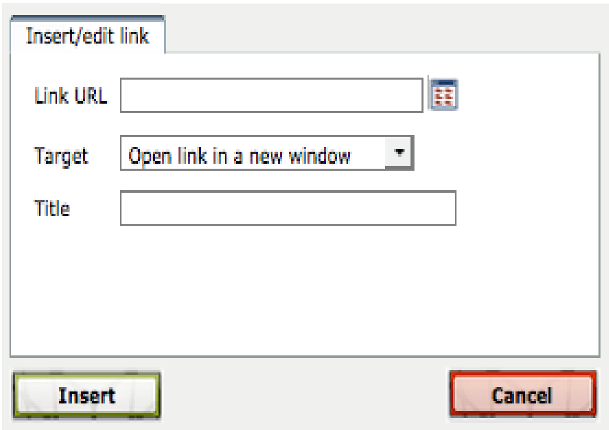
active, the news will be created according to the period and the term of validity of every piece of the news in one day.

You can view, change and delete the current news by choosing "Internal" or the respective unit.

Adding a link to news



1. Add the text that you wish to display as a link title and make the link active using the cursor.
2. Click on the “Insert/edit link” button.
3. The link insertion window opens where you can specify the link’s URL. If you wish, you can modify whether the link is opened in the same window (by default, the link is opened in a new window). An informative text can be added to the link, which is displayed when the user moves the cursor on the link. To that end, fill in the field “Title”.



Discussions

For what?

In WebDesktop, you can organise forum-like discussions where you can add answers to the initiated topic. Every user can participate in discussions.

How to set up?

3. To add a discussion, choose “Add new” → “Desktop” in the menu.
4. Upon adding a reply to a discussion, you can determine the type of the reply (in addition to the title and content). The desktop administrator can adjust reply types.