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METADOC User Manual

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1 INTRODUCTION

1.1 Purpose of this document

This document gives a general overview and guidelines for the utilization of Metadoc and Metadoc PRO.

Note about the version of this document: the 2 first numbers (major and medium) are identical to the metadoc version. The last number is the revision of the document and is not related to the metadoc version. (e.g. the user manual version 6.2.xx is related to any version 6.2.yy of metadoc)

The tool Metadoc was created in order to centralize, classify, approve and publish all written documents. This document gives an overview of the features and guidelines.

1.2 Glossary

Abbreviation	
CA	Certification Authority
DBS	Documents breakdown structure
FDA	US Food and Drugs Administration
ID	Identifier
IE	Microsoft Internet Explorer
MID	Metadoc ID
WF	Workflow
WFID	Workflow ID

1.3 Related Documents

REF.	Ed	Rev	Title

1.4 Referenced Documents

REF.	Ed	Rev	Title

2 TERMINOLOGY

To understand this manual, it is important to understand the concept and the philosophy behind the tool.

Metadoc is a tool dedicated to documents management. Some terms are used in this manual and have their definition in Metadoc.

A **document** in Metadoc is a file of any type (.docx, .pdf, .xlsx, .jpg, .exe, ...). Any file on your PC is thus a document.

A document in Metadoc is identified by its **MID** (Metadoc ID) and its **Version**. The MID is an integer number, the version can be any string of characters (e.g. "1.00", "A1", "A", ...). During its life cycle, a document will evolve and different versions of this document will be created. The MID is still identical for all the versions of this document.

In Metadoc, a document (more precisely, a document version) has an **Owner**. The owner is the person that recorded/created the version of the document in Metadoc.

A document version has zero, one or several **Editors**. An Editor in Metadoc is a person that has the right to update the version of the document. When a version of document does not have any editor, this version is "**checked-in**" (or "**frozen**"). It is impossible for any user to update this version anymore. When a version of a document has one **Editor** (or more), this version is "**checked-out**". This version is modifiable. It is then possible for the Editor(s) to update this version. Each document can only have one version with Editors, all the other versions are always **checked-in** (without Editor).

When a document version is finished, this version can follow an approval process. This approval process is called "**Workflow**" in Metadoc. The **Workflows** are used to review and approve documents by involved users. The workflows are the most common way to have a document version in the "**approved**" status.

The status of a document version informs about the maturity or the workflow stage of this document version. When a document is created, its **status** can be either:

- **Draft**: used for versions that are not mature and for which workflows will be used later to approve them.
- **External**: used for external document which does not have to be approved but are applicable as is.
- **No workflow needed**: This status is used for documents that are not critical and for which an approval process is not necessary. It is normally never the case for deliverable documents.

Now, let's go to the tool itself!

3 TOOL DESCRIPTION SUMMARY

This is a web-based tool: In order for it to be operational, javascript must be enabled.

The tool's main features will be detailed in the following chapters.

3.1 The login screen

This login screen contains news about the version, links to video tutorials, link to password recovery and login password field. Once logged in, the user authentication is valid until a “logout” or until the browser session is closed.

3.2 The main screen:

The screenshot shows the METADOC main screen. At the top, there is a navigation bar with buttons: Add Document, Derive Doc, Rename, METADOC-PRO, Bookmark, Workflow, and Start WF. Below this is a large search form with the text "Search form" overlaid. The search form includes a text input field and a "Version Rules" link. Below the search form is a table with columns: View/Edit, New Version/CO, Signing, PowerSearch, Clear, Copy to Clipboard, and Multi. The table lists search results, with the first result highlighted: "599 Static Analyzer presentation". The result details are shown on the right, including the file name "StaticAnalyserppt", size "212 kB", date "2003-08-26", and a table with columns "undefined", "Other / ~Unclassified", and "Generic / Generic". The result details are also overlaid with the text "Result details".

The screenshot shows the METADOC Advanced Search form. At the top, there is a navigation bar with buttons: Add Document, Derive Doc, Rename, METADOC-PRO, Bookmark, Workflow, and Start WF. Below this is a large search form with the text "Advanced Search form" overlaid. The search form includes a text input field and a "Version Rules" link. Below the search form is a table with columns: View/Edit, New Version/CO, Signing, PowerSearch, Clear, Copy to Clipboard, and Multi. The table lists search results, with the first result highlighted: "599 Static Analyzer presentation". The result details are shown on the right, including the file name "StaticAnalyserppt", size "212 kB", date "2003-08-26", and a table with columns "undefined", "Other / ~Unclassified", and "Generic / Generic". The result details are also overlaid with the text "Result details".

The main screen is split into 2 sections:

3.2.1 [the search section](#)

The user can switch between the simple one and the advanced one by clicking on the + / -



sign, on the upper left corner.

- In the simple one, by filling the field, metadoc will return the documents for which any metadata matches with the user input.
- In the advanced one, the user can fill in one or several fields with his search criteria.

3.2.2 [The result section](#)

This section is itself split vertically into the documents list and the document details (metadata).

- “All” documents matching the search criteria will be displayed in the results section. A maximum number of documents is defined in the configuration file and is visible in the header of the results list:

<< -300 << [1 to 300] / **514** >> +300 >>

In this example, the first 300 documents of the 514 matching documents are shown in the result list

- The result details zone contains the metadata of the selected document.

3.3 [Top Menu & Operations summary](#)

All operations are summarized hereunder. A chapter has been dedicated to detail some of them when needed.

At the top of the page, there is the main menu:



3.3.1 [Administration](#)

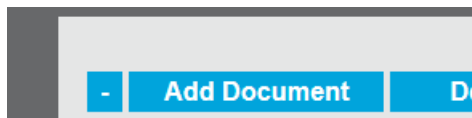
Gives access to the administration function and the account management. See the dedicated administration chapter 7 page 57 for details.



- **Category Admin:** To manage the category. Only accessible to administrators. Note: Category may be renamed as in this example it is renamed in process.
- **Project Admin:** To manage the project. Only accessible to administrators. May also be renamed
- **Services/DBS Admin:** To manage services and to define their document breakdown structure. Only accessible to administrators.
- **User Admin:** to setup the user information or change the password.
- **Recycle Bin:** This menu is only accessible to super administrators. It allows them to hard delete or to restore soft-deleted documents.
- **Group admin:** To manage user groups. Only accessible to administrators.

All these points are detailed in the administration chapter (7 page 57)

3.3.2 Add document:



Allows a user to create an entry in the database and to upload the first version of the document. When a document is uploaded into the system, it has the status “editable” (or “checked-out”). It means that, the content of the document can be updated as often as needed by its “Editor”.

3.3.3 Derive Doc:



It Allows a user to create a new document based on another one. It is useful for the creation of documents from a template. The derived document is the exact copy of the original one, including most of the metadata (all except : MID, Reference, Labels and Version comments).

3.3.4 Rename



This functionality is used to change the filename of a document. The filename is common to all the version except the extension. The extension is given automatically according to the uploaded document. It is however possible to force the extension. The change of an extension is for one version only and without changing the filename. e.g. To change .doc to .pdf of the file “Metadoc_User_Manual.pdf” into “Metadoc_User_Manual.doc”, simply add the “.doc” at the end without changing the filename, as shown hereafter.

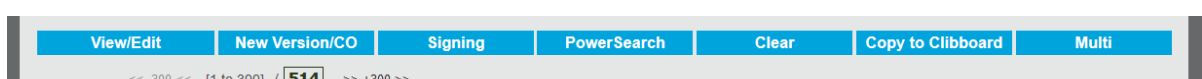
 A screenshot of the 'Rename Document' dialog box. It shows the current document name 'Metadoc_User_Manual.pdf'. Below it, a list shows '1 : Metadoc user manual'. The 'New Filename in DB (without extension):' field contains 'Metadoc_User_Manual.doc', with a yellow highlight on the '.doc' part. The field ends with '.pdf'.

3.3.5 Delete document:



The menu appears as a sub-menu of rename. This operation performs a “soft” delete of the selected version of the document (Only one version of one document can be deleted at a time).

- A document version can be soft-deleted by any administrator, the owner of the document or any user having write access on the selected document.
- A document version can be deleted ONLY if this version is not involved in a workflow. This document can be hard-deleted or restored by a super-administrator. See chapter 7.2.5 page 64 for details.



3.3.6 Bookmark:



Allows a user to manage its favorite documents and its favorite queries.

3.3.7 Workflow (Metadoc Pro Only):



Allows users to manage the document workflows (see chapter 4 for a detailed description of the workflows). Document Workflows provided in Metadoc are typically intended to support the document review and approval, including document signature registration compliant with FDA 21 cfr 11.

see chapter 6 page 46 for details

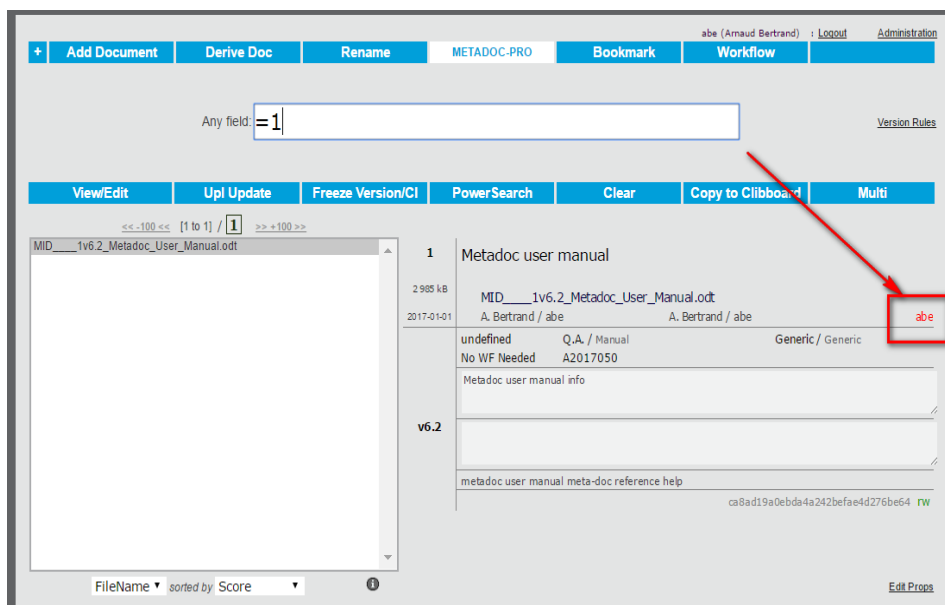
3.3.8 Start Workflow (Metadoc Pro Only):



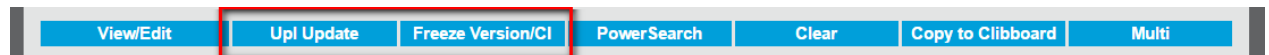
Allows users to start a workflow on a document. This document must be checked-in, must be the latest version of this document and can't already have an ongoing workflow. see chapter 6 page 46 for details.

3.4 Middle Menu & Operations summary

The middle menu can change, according to the selected document in the result list. If the document is “checked out” (not frozen), and the current user is the editor of this document (when a document is checked-in, there is no editor. When a document is checked-out, the editor appears in red in the details as shown here:



So, when the user is the Editor of the selected document, the user can update the document on the server and can check-in the document. The middle-menu appears like this:



When the document is checked-in (there is no Editor), the middle-menu appears like this :



If the document is checked-out but the current user is not Editor, than this 2 place on the middle-menu will be empty.

3.4.1 [View/Edit:](#)

Allows users to open, view and edit the selected document.

NOTE: Double click on the name in the results list has the same effect than clicking the view/Edit button.

3.4.2 [Upl Update:](#)

Upload/Update button allows the editor of a document to upload his modifications to the server. BE CAREFUL, the version on the server will be overwritten by the new one. This operation can be repeated as frequently as needed. An easiest way to perform an “upload update” is to use drag & drop. See dedicated chapter drag & drop for details.

NOTE: As explain before, this “Upl Update” button is only visible when the selected document has an editor (Is checked out).

REMINDER: To be allowed to upload modifications, the user must be the ‘Editor’ of the document. The Editor appears in red in the document details.

3.4.3 [New Version / CO](#)

Check-out button allows a user to create a new version of the selected document. To be allowed to create a new version, all versions of this document must be checked-in.

The new version “number” is proposed according to the version policy defined in the configuration file.

When a document is checked-out, the new version is created immediately and is the identical copy of the selected one. It is only after this creation that the Editor can use the ‘Upload update’ button to update the version.

Most of meta-data are also inherited from the selected version (every meta-data except “Version” of course, “Version comments”, Status, Reference and Labels).

3.4.4 [Freeze Version / CI:](#)

This button allows a user to freeze definitively the document version. This button is only visible when the selected document has an editor (Is checked out).

When a document version is checked-in, it doesn’t have Editor anymore and it is not modifiable anymore.

3.4.5 Signing

This button is only visible when a frozen version of document is selected. It allows the user to add a comment and to sign a document. Any user with read access can sign a document.

According to the privileges of the user, signature can be used to change the status the document or to change its version “number”.

3.4.6 Powersearch

This button is only available when the product “Metadoc Powersearch” is installed. This product is fully integrated with Metadoc and allows user to perform full text search and facets searching.

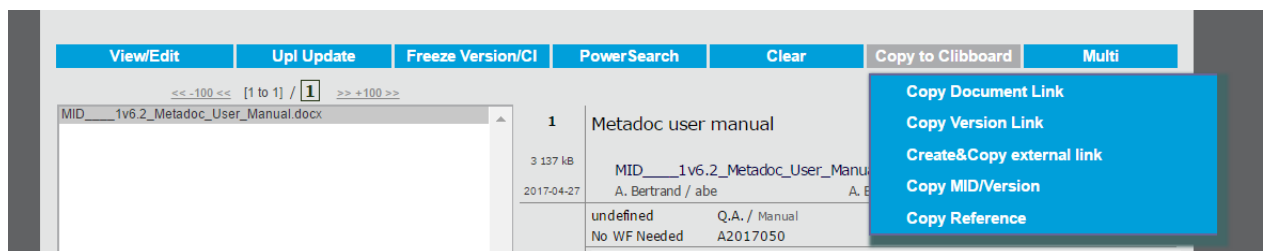
The contents of usual kinds of documents (doc, xls, ppt, pdf, ods, txt, html, xml, ...) are indexed and are searchable with the powersearch tool.

3.4.7 Clear

Completely clears the search form (to make a new search). Hitting **F12** key has the same effect. When it is used, the list of results is refreshed.

3.4.8 Copy to Clipboard

This is a submenu that allows the user to copy information to the clipboard



3.4.8.1 Copy Document Link

When the user clicks on it (or hit the function key F8), the Internet link of the selected document is displayed in the comment field and this link is automatically saved in the clipboard for most of the browsers.

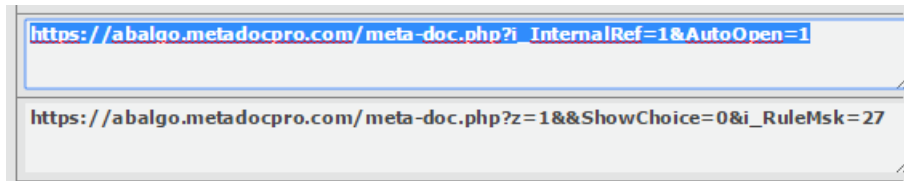
The link is a link to the version selected by the version rule policy! It means that the link could point to different version according to the status of the version document when this link will be clicked. It is really useful to point to the latest applicable version.

This function is essential for communication. Instead of sending the complete document via e-mail, you just paste this link in your mail. Of course, it is only valid for users that have access to Metadoc.

The link will appear as below:

https://abalgo.metadocpro.com/meta-doc.php?i_InternalRef=2387&AutoOpen=1

If the browser does not support the “copy to clipboard” functionality, the link appears in the “comment” field as below:



3.4.8.2 Copy Version Link

Identical to the previous one except that the link points to the selected version! (the version rules is then not taken into account!). It is useful when a specific version is needed.

3.4.8.3 Create & Copy External Link

This is a particular function that creates an “external” link to the selected documents versions. This “external” link is usable by any users that have an internet access to the Metadoc server but not specially credential on Metadoc. It allows to transmit multiple documents at once! It is ideal to transmit data packages to customers or subcontractors that can reach the network but don’t have Metadoc Credentials.

By default the link validity is limited according to the configuration file. By default, the link can be used 5 times during maximum 10 days.

3.4.8.4 Copy MID/Version

When the user clicks on it, the MID followed by a slash (“/”) and the version of the selected document is displayed in the comment field and copy to the clipboard (on browsers that supports this functionality). This is useful to refer a document within another one (typically in the applicable documents section).

3.4.8.5 Copy Reference

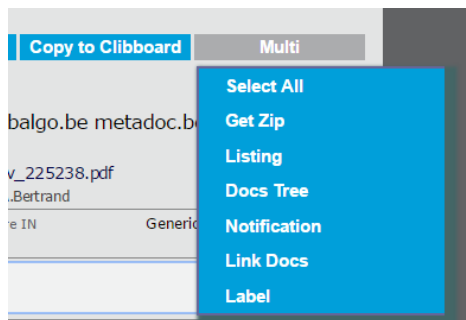
When the user clicks on it, the Reference of the selected document is displayed in the comment field and copy to the clipboard (on browsers that supports this functionality). This is useful to refer a document within another one (typically in the applicable documents section).

3.4.8.6 Permalink

When on of the previous “copy to clipboard” function but External Link is used, the html link of the permalink are displayed in the and “version comment” field. The permalink is a simple url that can be copy/pasted to reproduce current query (to complete all the query fields automatically). This permalink can be sent by e-mail to share some set of documents or can be bookmarked in the browser itself.

3.4.9 Multi

It is a particular submenu that concerns operations applicable on multiple documents selected in the Results list.



3.4.9.1 Select All

Self-explanatory: when the user clicks on it, all the documents in the result list are selected at once.

3.4.9.2 GetZip

When the user clicks on it, all the selected documents are downloaded at once (in a compressed zip file).

3.4.9.3 Listing

This function is used to construct a listing of the selected documents. A new page is open that requests the title of the listing and the columns to display in the listing.

Title of listing: Listing

- ☐ Visible html link in a dedicated column
- ☒ Hidden html link
- ☐ Auto Open present in Html Links (if any)
- ☐ DB Id
- ☒ Mid
- ☒ Version
- ☒ Ref
- ☒ Title
- ☐ Name
- ☐ Size

When the user click on listing, the listing is displayed:

Mid	Version	Ref	Title	Author	Status	LastChange
6579	0		Athena process improvement project Boscar	MB	Obsolete	2005-02-22
7038	0		BOSCAR on Competencies Management	VL	Obsolete	2005-04-15
7040	0		MI-Equipment Development Production Lifecycle management process improvement	MK	Obsolete	2005-04-19
7050	0		Product Management	FV	Obsolete	2005-04-19
7051	0		Improvement of radioprotection control on FDG producing centers	VIC	Obsolete	2005-04-19
7052	0		Cost Reduction of PET projects	BV	Draft	2005-04-19
7232	0		NIKE project: Quality Management System Web Site Development	MB	Draft	2005-05-26
7489	0		BOSCAR on Worldwide Customer Service Department	BR	WfCancel	2005-06-17
8439	0		Competencies management - Orchestra Step 2	VL	Obsolete	2005-11-25
8546	0		Customer Requirement Management	OV	Obsolete	2005-11-22
8837	0		BOSCAR PT V&V process reengineering	jcp/sgillis	Obsolete	2006-01-16
9353	0		BOSCAR Capacity Planning and Task Lists	HRO	WfCancel	2006-03-09
9354	0		List of existing BOSCAR + Status	IF	Draft	2006-03-09

[Go back to Main menu](#)

User can click on the column header to sort the listing. This listing is very useful to have a status of a project for example. The table can be easily copy/pasted in excel.

3.4.9.4 Docs Tree

The complete tree(s) of the selected document(s) will be displayed. If, in the tree, some documents are “not visible” for the user, the tree is limited to the last document visible before the first invisible document (in both directions: father and children).

See Links Docs to know how to create links between documents

3.4.9.5 Notifications

This function allows the user to manage its notification when events occur on documents. Events can be chosen among “new version”, “document updated”, “freeze version”, “properties have changed”.

3.4.9.6 Link Docs

This button allows the user to link multiple documents together. Multiple documents have to be selected before entering in the link screen. Once the button is clicked, another screen is displayed and the father must be chosen. Once the father is chosen, the child (children) can be chosen. A link is done globally for a document (it is on MID level, not at version level). Limitation: a document can have only one father. So, a document can be part of one documents tree only.

3.4.9.7 Labels

One of the most important functionality: It allows the user to place a label on a set of documents. This is very useful to identify a baseline of documents. Of course a label can only be set on only one version for each document but one version can receive multiple labels.

4 MAJOR OPERATIONS

4.1 Add Document

Any authenticated Metadoc user can add a document (a new or an old one!) into the system. All documents (of any kind) should be added in Metadoc, at the beginning of its life-cycle.

To add a new document, the user just has to click on “Add Document” on the main screen (or use the drag and drop functionality) and to fill in the following form:

Add Document

File Path: Choisissez un fichier

Name:

Version: Mid: 2395 Ref:

DateOfEntry: 2016-05-07 LastChange: 2016-05-07

Title:

Author:

Responsible:

Category: undefined

Service:

Project:

Status: No WF Needed

Type:

SubProject:

Comment:

Vers.Com:

Keywords:

Editor: abe

Group	Visible	Readable	Writable
Users	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Finance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
guest	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H.R.M.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
IBA	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Management	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
medical	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
QSpin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4.1.1 Fields description

- **File Path:** the path of the file the user wants to add into the system. The browse button can be used to browse the filesystem. When the drag&drop is used, this field is, of course, not used.
- **Name:** the name of the previous field is taken by default. BUT it could be useful to change it, especially when this name contains the version number because it will be used as part of the filename for all the future versions.

This name will also be used during the future view/edit operations. Hence, it is important to give an explicit name.

So, here is the second recommendation:

The “Name in db” must NOT contain the version number or the reference but should be an explicit name. Special characters such as accents, quotes, spaces, parentheses, slashes (/) and backslashes (\) are forbidden.

- **Version:** contains the document version number. This field can NOT be modified later without high privilege account! As version numbering of documents is company dependent, version numbers and formats are free on Metadoc. An example of version numbering management is described in next paragraph:

Version numbering management is described For instance; a document starts with the version '0'. The number is increased for minor changes and disappears when the document is approved, at which point the version becomes 'A'. When a new version is created, it is the version 'A0'. After the second flow, the version will become B,...

- **Reference:** As document referencing is company dependent, reference number and formats are free on Metadoc. An example of reference numbering is described in next paragraph. Leave this field empty if the document does not have any reference. This field can be modified later.
- **Date of entry:** Normally this field should stay as is. This is the date of entry in the Metadoc system
- **Last date of modification:** Normally this field should stay as is. The only reason to modify this field is if an old document is introduced into the system.
- **Title:** This is the title of the document, is must be explicit enough and can contain any character.
- **Authors:** these are the real document author(s). It can be external or even unknown. Different authors must be separated by a comma (“,”)
- **Responsible:** This is the responsible of the document. Generally, this is the project leader.
- **Category:** This metadata is for general purpose and must be defined in the company process.
- **Service and Type :** These 2 metadata are linked together. Each service has its own types. It is defined at company level in the **Services/DBS Admin** feature. Whatever the fine tuning of these metadata, they are more dedicated to the type of document itself.
- **Project and Subproject :** These 2 metadata are linked together. Each project has its own subprojects. It is defined at company level in the **Project/Subproject Admin** feature. Whatever the fine tuning of these metadata, they are more dedicated to projects.

NOTE: the name of the fields are fully configurable and the screenshot shows an example:

- **Status:** it describes the current status of the document. This status field is either managed directly by the author of the document (in case no work flow management is activated on the document) or by the workflow management function, once it is activated on the document. Following table describes possible status values.

Status	Description	Standard version	Pro Version (Workflow feature enabled)
No workflow needed	All kinds of documents that are not official	Yes	Yes
External	External document which does not have to be approved but are applicable as is.	Yes	no
Draft	The author is not satisfied enough and the document can be re-worked to be finalized	Yes	Yes
To review	The document is currently being reviewed	Yes	Reserved
Reviewed	Document has been reviewed and agreed upon comments have been integrated	Yes	Reserved
To approve	The document is currently being approved	Yes	Reserved
WF-approved	Document has been approved but must be ratified by QA	Yes	Reserved
Approved	The document has been approved	Yes	Reserved
Repudiated	The document has been approved and repudiated	Yes	Reserved

➤ **Description:** Description of the document contents and any comments on the document

➤ **Version Comment:** This field is dedicated to comments related to the specific version. In other words, it is the change log.

➤ **Keywords:** This is probably the most important field for make the document searchable! It should contains between 6 and 15 keywords separated by “,” or white space. In order to put together a list of key words, the author should consider what words he would use to search for this document.

- **Editor:** Normally, this field should stay as is. However, sometimes the user that adds the document would like to hand it over to another user. In this case, the editor can be changed.

- **Document access rights:** For each user group defined within Metadoc, the access rights to the document can be given as following:

- **Visible:** The members of this group can view this document
- **Read:** The document can be read by the members of this group
- **Write:** A new version of the document can be loaded by the members of this group (e.g. through a Check-Out)

In addition to those access rights, the owner and the editor of a document has still view, read and write access to a document.

Note: When a document is introduced to the system, its status is “checked-out’ or, in other words, “editable”. It means that the content of this document can be modified as frequently as the owner wants. To definitively close the version of this document, it should be frozen (by clicking on “Freeze version/CI”

Add Doc is not the only way to add document. If a document must inherit the properties of another one OR if a document derives from another one, the “Derive Doc” functionality can be used.

IMPORTANT: When a document is transferred from an old system (e.g. y:\Control\...) the file in the old system should be renamed with the prefix “__metadoc__” to indicate that this file was transferred.

4.2 View / Edit document

This is, of course, one of the most important operations.

To see a document, simply select it in the results list and click on “view/Edit” button or double click on the document in the results list.

The behavior is function of the configuration. The most common configuration is “download as attachment”: the document is downloaded in the user download folder.

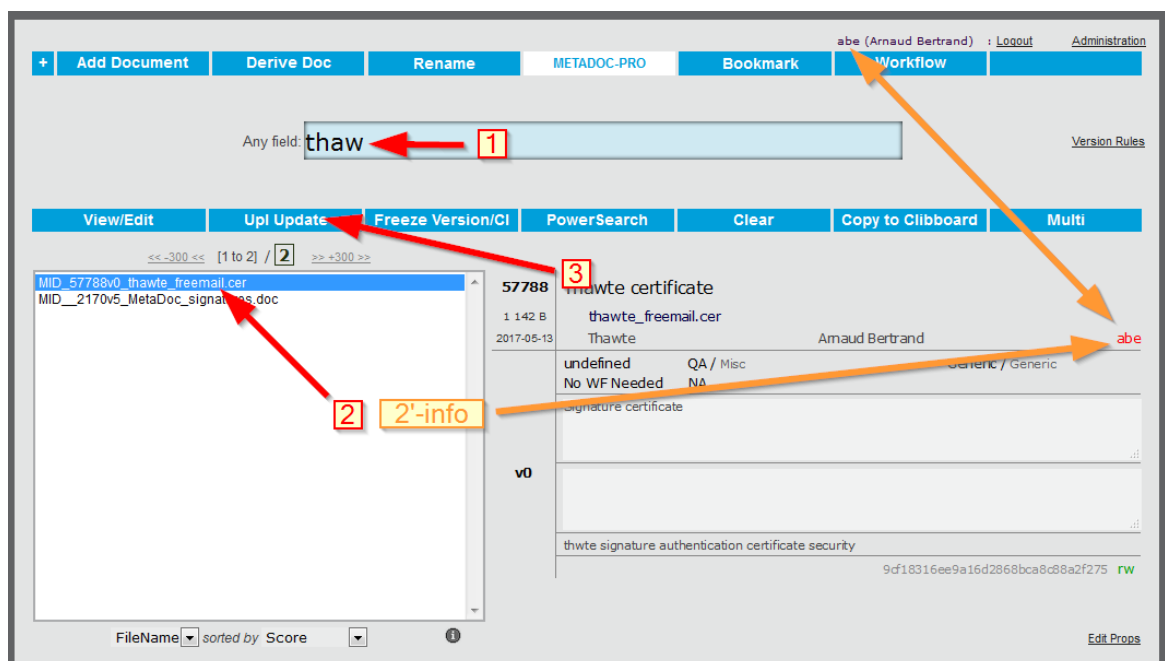
Warning: this document will be fetched locally by the browser and saved locally on the client computer. This means that the document is LOCALLY writable. BUT it does not mean that the user will have the right to update it on the server. (see upload update hereafter).

Due to this mechanism, **here is the first recommendation:**

Each user should create a workspace directory “metadoc-workspace” where any documents downloaded from Metadoc should be saved in order to work on it.

4.3 Upd Update:

When a document was modified locally, the document, in the tool is not up to date anymore! It is then necessary to upload the updated file. Upload/Update button allows the editor of a document to upload his modifications to the server.



- (1) Search criteria is filled in if needed (2) document to updated is clicked (note the editor is the logged user) (3) “UI Update” button is clicked. Then the next screen is:

Upload Update

Documentation Id.: 57788 Version: 0

Filename: thawte_freemail.cer

Title: Thawte certificate

Size: 1142 MD5: 9cf18316ee9a16d2868bca8c88a2f275

File to upload : [Parcourir...](#) Aucun fichier sélectionné.

☒ Set the "Last Change Date" to today

[UPLOAD](#)

[Go back to Main menu](#)

(1) The user must browse the filesystem to choose the file to upload.

(2) The user must click on upload.

The check box can be unchecked. If it is checked (checked by default), "Last modification date" is automatically updated according to the current date.

Then a status screen appears:

When everything worked properly, the screen informs you about the MD5 hash of the file. This screen disappears after a few seconds.

Update Document

Document thawte_freemail.cer successfully uploaded with md5 514f1b439f404f86f77090fa9edc96ce

[Go back to Main menu](#)

BE CAREFUL, the version on the server will be overwritten by the new one. This operation can be repeated as frequently as needed. An easiest way to perform an "upload update" is to use drag & drop. See dedicated chapter drag & drop for details.

It is also possible that the file the user tries to upload is already in Metadoc, in this case the user gets an error message and the file is NOT UPLOADED into Metadoc (but it already exists in Metadoc, may be in another reference)

Update Document

Sorry, your document can't be uploaded because a document with the same signature is already uploaded.

Uploaded by : abe

Document ID : 57788

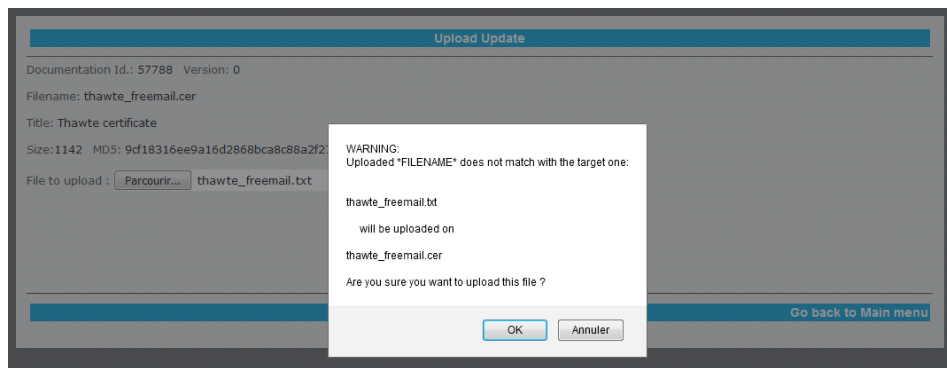
Version : 0

Your document has NOT been updated, please correct the problem

[Go back the update form](#)

[Go back to Main menu](#)

When the user tries to upload a file that does not have exactly the same filename, the user must confirm it is not a mistake, the following screen appears:



NOTE: As explain before, this “Upl Update” button is only visible when the selected document has an editor (Is checked out).

REMINDER: To be allowed to upload modifications, the user must be the ‘Editor’ of the document. The Editor appears in red in the document details.

4.4 Derive Document

This is an interesting feature for the creation of new documents from a template (or any other document) OR to add a document that has properties that are similar to another one.

Anyone can create a derived doc **of the selected document** by clicking on “Derive Doc”

Actually, “Derive Document” is exactly identical to “Add Document” except that:

- A copy of the selected document is made to be the start point of the new document
- The properties of the selected document are copied to be the original properties of the new one.

In other words, this means that the user has to choose a new filename and has to modify the properties as needs be.

When an existing document must be added in Medtadoc, the “Derive Doc” feature can be used to inherit the properties of a document that is already in Metadoc. A separate upload must be done, just after the creation of the document.

4.5 Edit Properties

This allows any user to modify the metadata of a document. When a version is checked-in, some metadata can’t be changed anymore

Some other metadata can NOT be modified:

- The filename (must be done by the rename function)
- The version (can only be done by using the signature feature and if it is allowed by the metadoc administrator via the configuration file)
- The owner (the owner is the person who has add the document in Metadoc).
- The status of the document, once the workflow has been started.

Only the owner, the current Editor or a super-administrator can change the Editor. The Editor must be a valid one (when it is not the case, the user is warned that the Editor is left unchanged even if the rest of changes was done successfully).

A checkbox allow the user to affect all the version of the edited document. Of course, this affects only a subset of the properties: (Title, Reference, Author, Responsible, Service, Project, Subproject, Type, Comment, Keywords and access rights), the other properties are not affected.

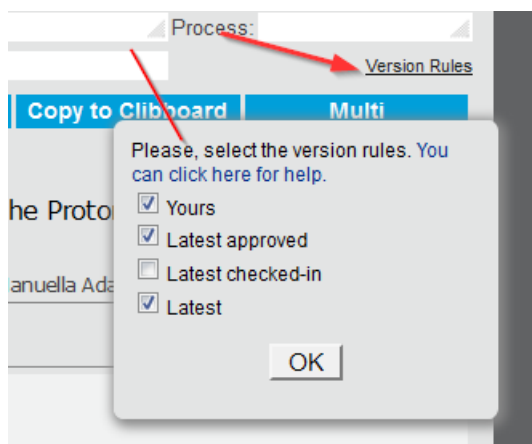
5 SEARCHING FOR A DOCUMENT

This is probably the most important feature of document management tool. It allows the user to filter the documents. Metadoc proposes 3 systems to perform a document filtering:

- **Using detailed metadata** : search for text in specific metadata content
- **Using global metadata** : search for text in any metadata content
- **Using a full text search (using powersearch)** : search for in the document content

The results list depends of the version rules:

5.1 The version rules



Here is how the version selector works:

The rules are displayed in the priority order. The system selects the documents versions regarding these rules.

For each document, the system tries to find the latest version that matches the rules. The rules are considered successively until at least one version is found.

When the check box in front of a rule is not checked, this rule is simply ignored (and the next rule is evaluated if any).

Here are the rules:

- ***Yours***: This rule checks existence of a version for which YOU are an Editor or YOU have checked-in this version
- ***Approved***: This rule checks existence of an approved version, if any, the latest approved version is selected.
- ***Latest Checked-In***: This rule checks existence of a checked-in Version. If any, the latest checked-in version is selected (a version having the status: 'draft' is not considered as checked-in).
- ***Latest***: This rule select the latest version even if it is a draft or there is an editor.

5.2 Basic search (based on metadata)

When a field is left empty, it means that it is not taken into account by the filter.

When fields contain some characters, the filter tries to do a pattern matching. Except for the MID and version, the pattern matching is based on the beginning of each word in the field (not “whole word”) and is case insensitive.

For example, the pattern “*gen*” will match with “*Process Generation*” and “*General*”

For the “ID” and “version” fields, the pattern must exactly match the content of the field.

For the “date” fields, the date(s) must have the format “YYYY-MM-DD”.

There is also a drop down list used to specify the versions to find:

5.3 Complex search - Logical combination

5.3.1 Logical operator

It is also possible to use logical expression in the fields:

The recognized operators are:

- AND (also “and” “&” “&&” “,”)
- OR (also “or” “|” “||” “,”)
- NOT (also “not” “!”)
- The parenthesis

For example, if a user wants to search all the documents containing “archi” in their title and that does not contain “dicom” nor “dips” in their keywords he can fill in the fields as follows:

NAME: arch

KEYWORDS: not dicom and not dips

Other examples:

AUTHORS: dte

KEYWORDS: (dicom or dips) and (mapping or faq)

AUTHORS: dte or abe

KEYWORDS: user manual

KEYWORDS: mapping !dips (equivalent to: mapping and not dips)

5.3.2 Exceptions

All the “text entry” accept logical expression and, each entered word will be considered as a part of the word to search.

BUT 2 fields make exception to this rule:

The field “Id” : it does not accept logical expression and are considered as “whole word”! It accepts a wildcard character if there is only one entry. It accepts a list of Id separated by “,”. So:

Are correct: “1”; “1%”; “2_1”; “23,45,96,2070”

Are NOT correct: “1 | 2”, “1_,2”, “1 2 3”

The field “Version”: It accepts logical expressions but each part of the logical expression is considered a “whole word”. So, to see all versions beginning by the letter “A”, the expression must be “A%”

5.4 Wildcard character & delimiter

5.4.1 Wildcard character

The character underscore (“_”) or question mark (“?”) is considered as “any character”. This is useful to check if a field is empty. The pattern “!_” will only match with empty fields (fields that do not match with any character)

The character percent (“%”) or the star (“*”) means “any string”. It means that “gen%” will match with “generating” and will also match with “generation”. Actually, the “%” at the end of a word is implied and is not necessary. However it can be used in the beginning of a word because, in this case, it is not implied! (e.g. *ration will match “generation” and will match “preparation” too.

These characters can be escaped with the backslash character.

5.4.2 Delimiter character

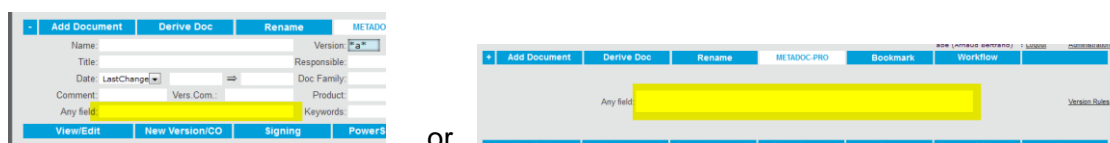
In some situation, it is necessary to search for the whole word and not all the words that begin with a string. In this case, the double quote “ or the \$ may be used

e.g. **ration* will match *preparation* but will NOT match *rational*

5.5 Using global metadata with the “Any field” entry

User has simply to type beginning of the words he is looking for in any of the field and metadoc will display all documents containing all these words in one of their meta-data whatever it is (filename, title, project name, author, description, keywords, ...).

The “any field” entry is present in the simplified and in the advance search screen:



or

5.5.1 Special features of the "any field" entry

- you can find documents that are signed by using "::signed" in the "any field" entry
- you can filter document(s) based on its ID or a list of IDs by using the "=" sign before the ID or the IDs list separated by coma. (e.g. "=23" or "=23,45,567")

5.6 Useful filters

It is easy to find all the frozen (checked-in) documents by filling the Editor field with “!_”. Of course, it can be combined with all other filters.

For example

- Filter to find all the frozen (checked-in) documents speaking about architecture:

EDITOR: !_

KEYWORDS: archi

- Filter to find all the edited (checked-out) documents by abe

EDITOR: abe

- Filter to find all the edited (checked-out) documents

EDITOR: _

- Filter to find all the documents that do not have a reference

REFERENCE: !_

- ...

6 OTHER FEATURES

6.1 Drag & Drop

The drag & drop feature can be used for all the operations where files must be uploaded into Metadoc:

- Add a document
- Derive document
- Update document
- Create a new version

It can also be used to check if documents are already in Metadoc!

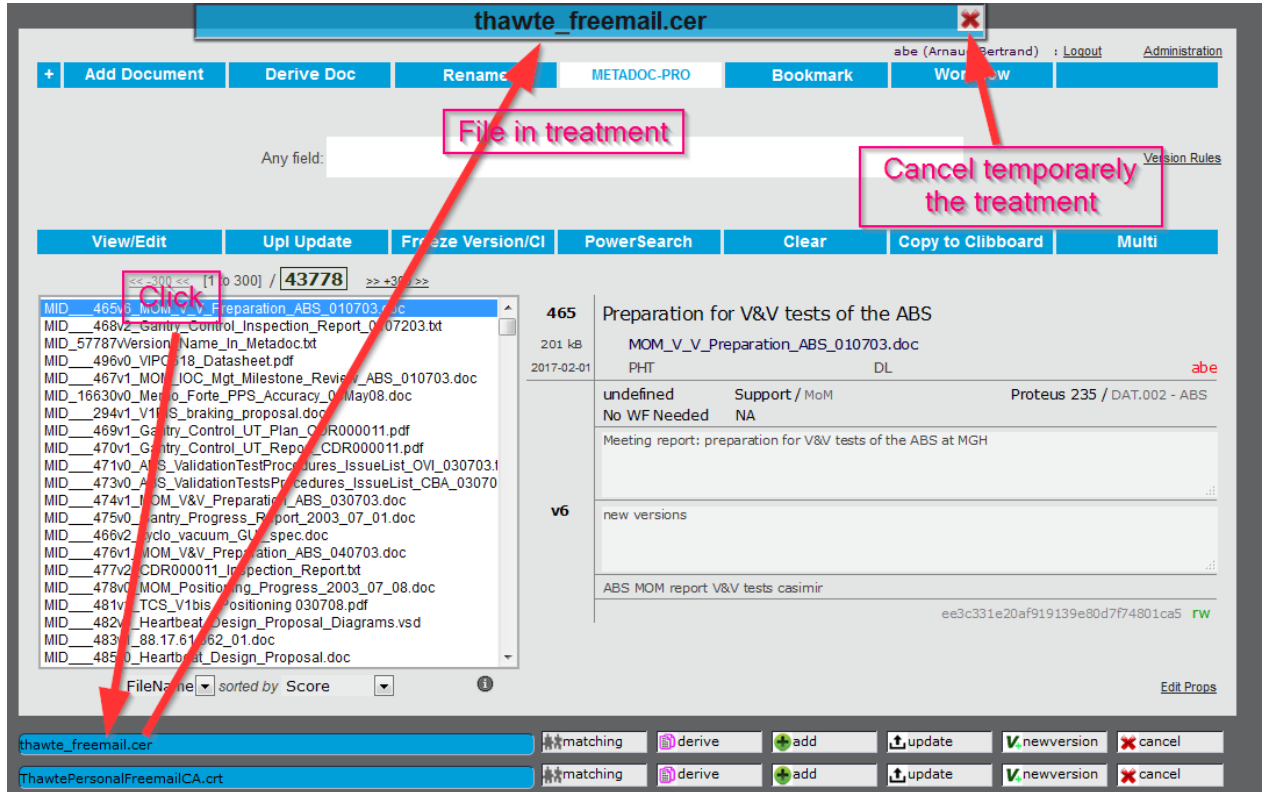
When files are dragged and dropped in Metadoc, they appear like here:

The screenshot displays the METADOC-PRO web interface. At the top, there's a navigation bar with buttons: '+ Add Document', 'Derive Doc', 'Rename', 'METADOC-PRO', 'Bookmark', 'Workflow', and 'Administration'. Below this is a search bar labeled 'Any field:' and a 'Version Rules' link. A secondary navigation bar contains buttons: 'View/Edit', 'Upl Update', 'Freeze Version/CI', 'PowerSearch', 'Clear', 'Copy to Clipboard', and 'Multi'. The main content area is divided into two panes. The left pane shows a list of documents with columns for MID, filename, and size. The right pane shows details for a selected document: '465 Preparation for V&V tests of the ABS'. It includes metadata like '201 kB', '2017-02-01', 'PHT', 'DL', and 'abe'. A red arrow points from the bottom toolbar to the 'new versions' section in the document details pane. The bottom toolbar contains buttons for 'matching', 'derive', 'add', 'update', 'newversion', and 'cancel'.

The file are in status “waiting for treatment”. These file will appear there until the user processed them. However, it is still possible to use Metadoc normally.

To treat the files, there are multiple possibilities:

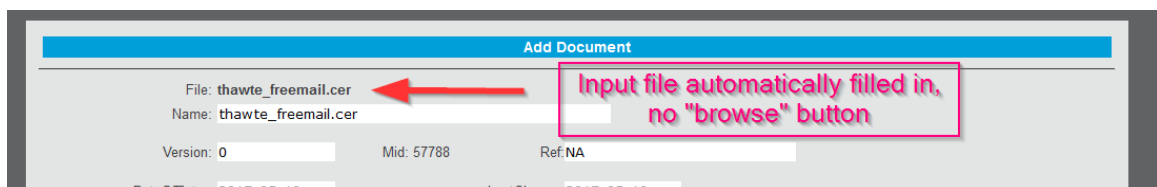
6.1.1 Click on the filename



When the filename is clicked, it appears on the top of the screen to indicate the file is “in treatment”. Nothing else occurs in metaodc. Nothing change on the search filter nor on the results list.

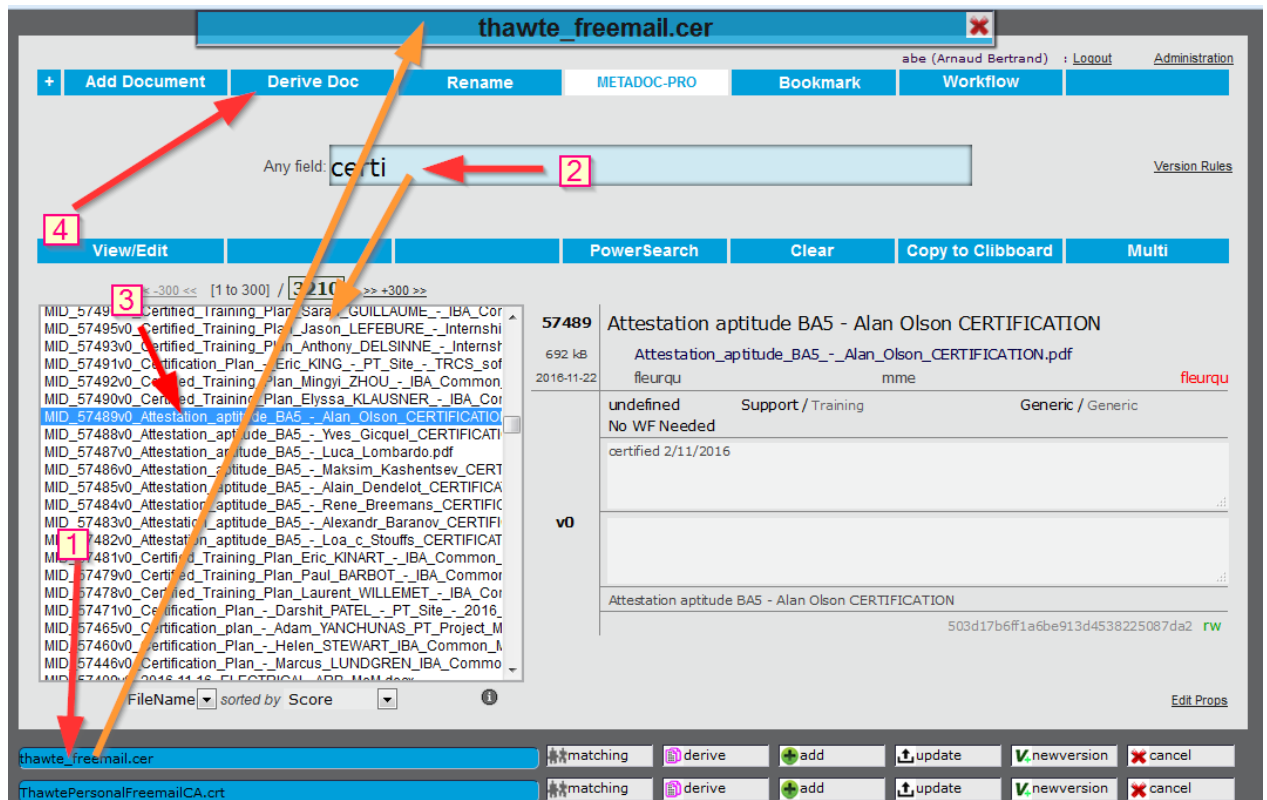
When a file is “in treatment”, any click on the button “Add document”, “Derive Doc”, “Up Update”, “New Version” of the main screen will assume that the file to Add, to Derive, to Upload is the “file in treatment”.

Example if “Add document” is clicked (on the top left of the screen), the next screen is:



The file to add is automatically filled in (in comparison with the usual “add document” screen), it assumes the file is the one the user has drag&dropped, and clicked.

Example if “Derive Doc” is clicked (on the top left of the screen): Metadoc will derive the properties of the selected document of the results list and the new document itself will be replaced by the “in treatment” document.

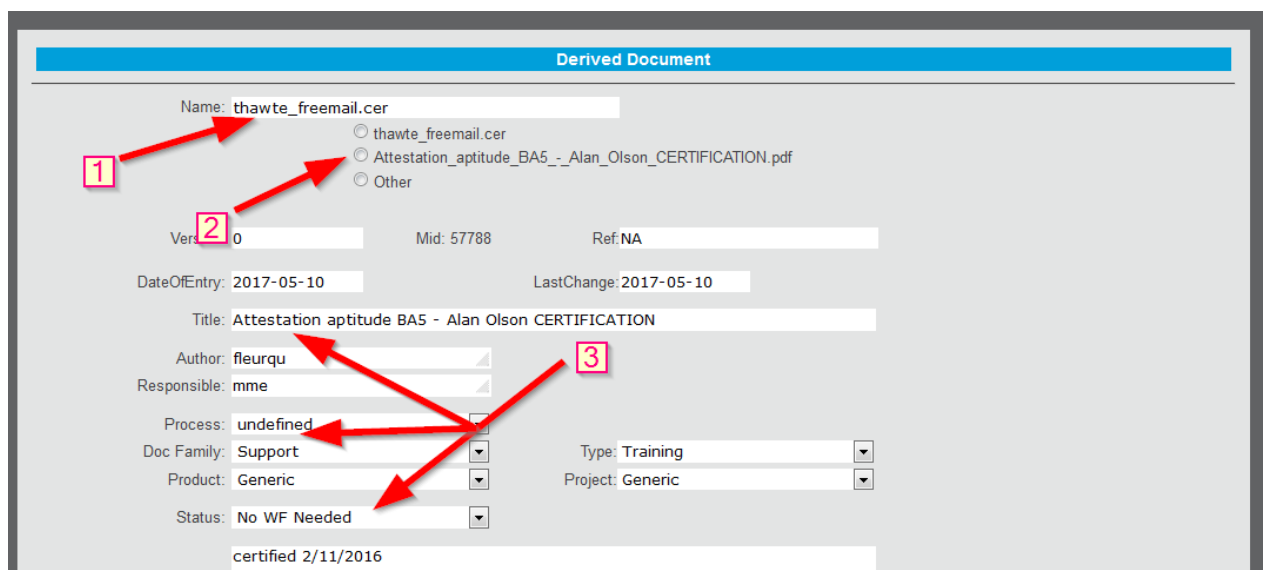


The filename is clicked (1), then a search criteria is introduced (2) (Note these 2 operation may be inverted).

Then, the document that the user want the properties for is derived document is selected (3)

Finally, the user click on “Derive Doc” (4)

The next screen is then:



(1) Shows that the default name is the name of the file that was drag&dropped.

(2) Shows that the user can easily select the original name of the derived document by clicking the radio button.

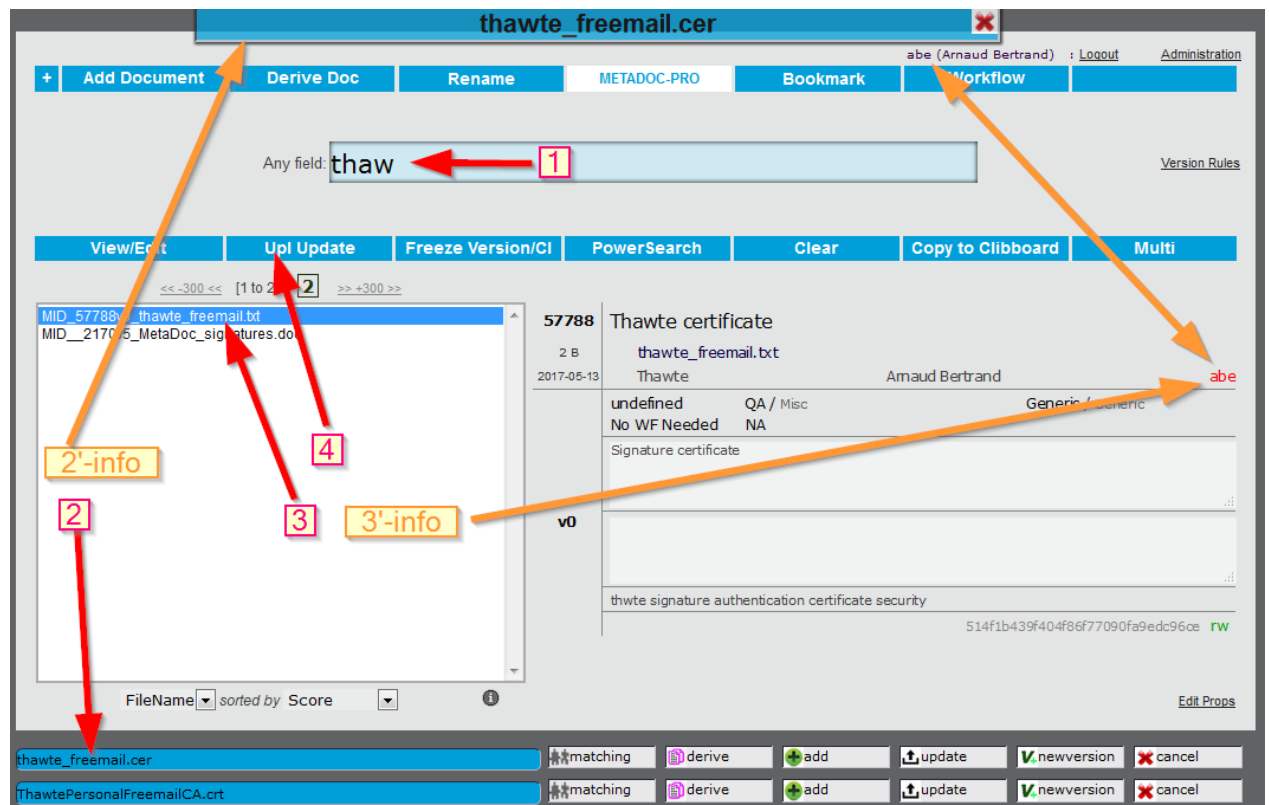
(3) Shows that some meta-data are well inherited from the derived document

Example if “New version” Is clicked:

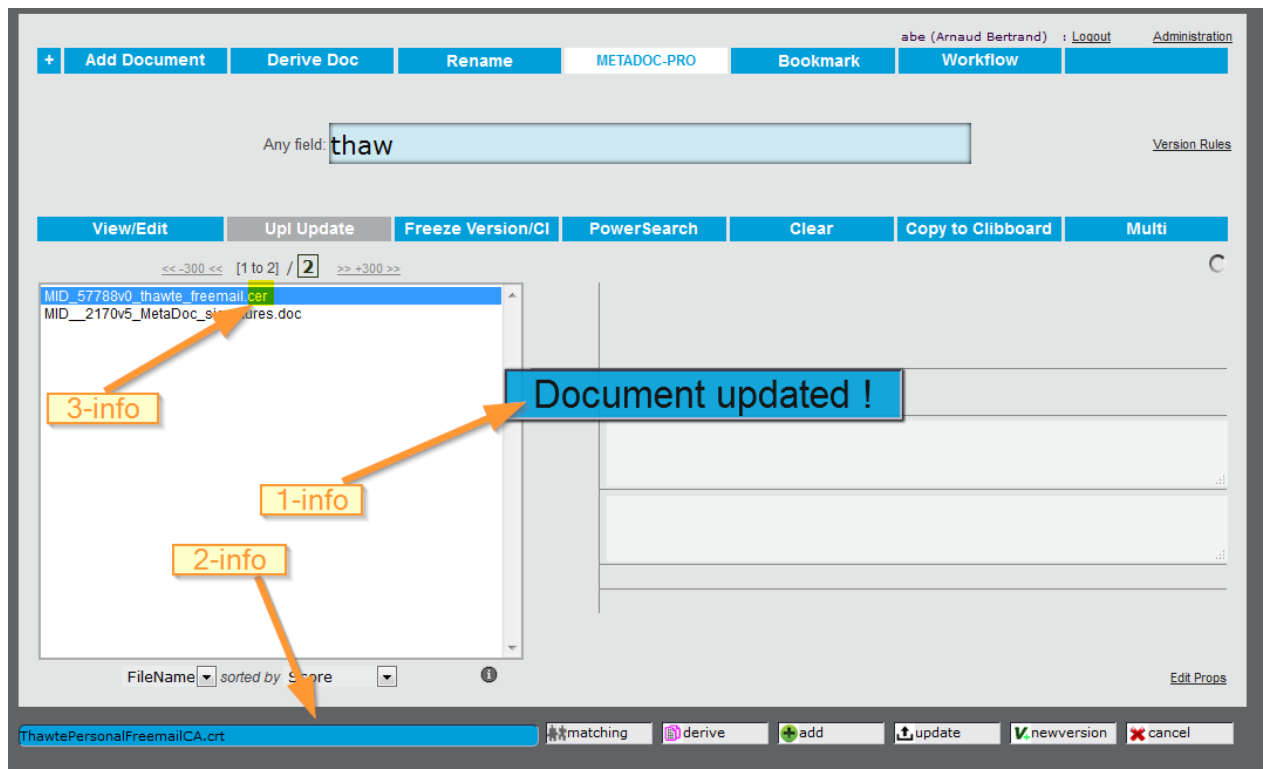
It is exactly the same principle. The “New version” screen (new version of the selected document in the results list) appears but instead of simply duplicate the file, the new version is replaced by “file in treatment”. This is equivalent to create a new version with the other method and after to make an “upload update” of the file that was drag&dropped.

Example if “Upl update” is clicked:

In this case, the “file in treatment” will replace the file of the selected document of the results list. (It is equivalent to use “Upl update” (without drag and drop) and then to browse to the file that was “drag&dropped” and click on “upload”). When it is done, a simple popup appears a few seconds to confirm the replacement:



A search criteria is introduced (1), then the filename is clicked (2) (Note these 2 operation may be inverted), (3) the file to replace is clicked in the results list (3) (info, the user must be editor of the file to allow an “Upload Update”, and finally, the “Upl Update” button is clicked (4)

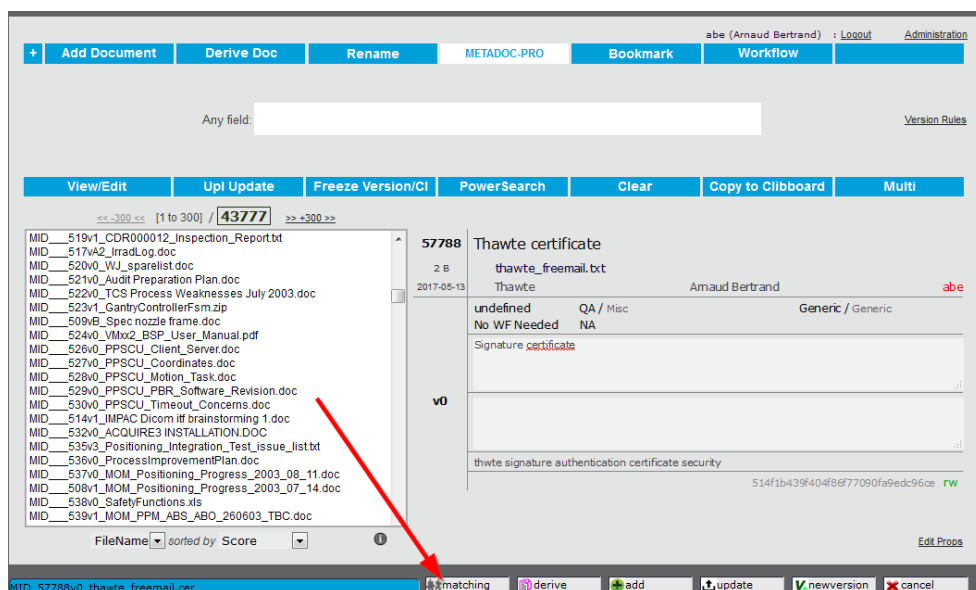


- (1) Shows the popup that confirms the document us updated
- (2) Shows that the “file in treatment” disappeared from the list
- (3) Shows that the extension was automatically updated according to the file that was uploaded. Note: Only the extension is updated, the name (exceptextension) remains the same as is was, whatever the name of the “file in treatment”.

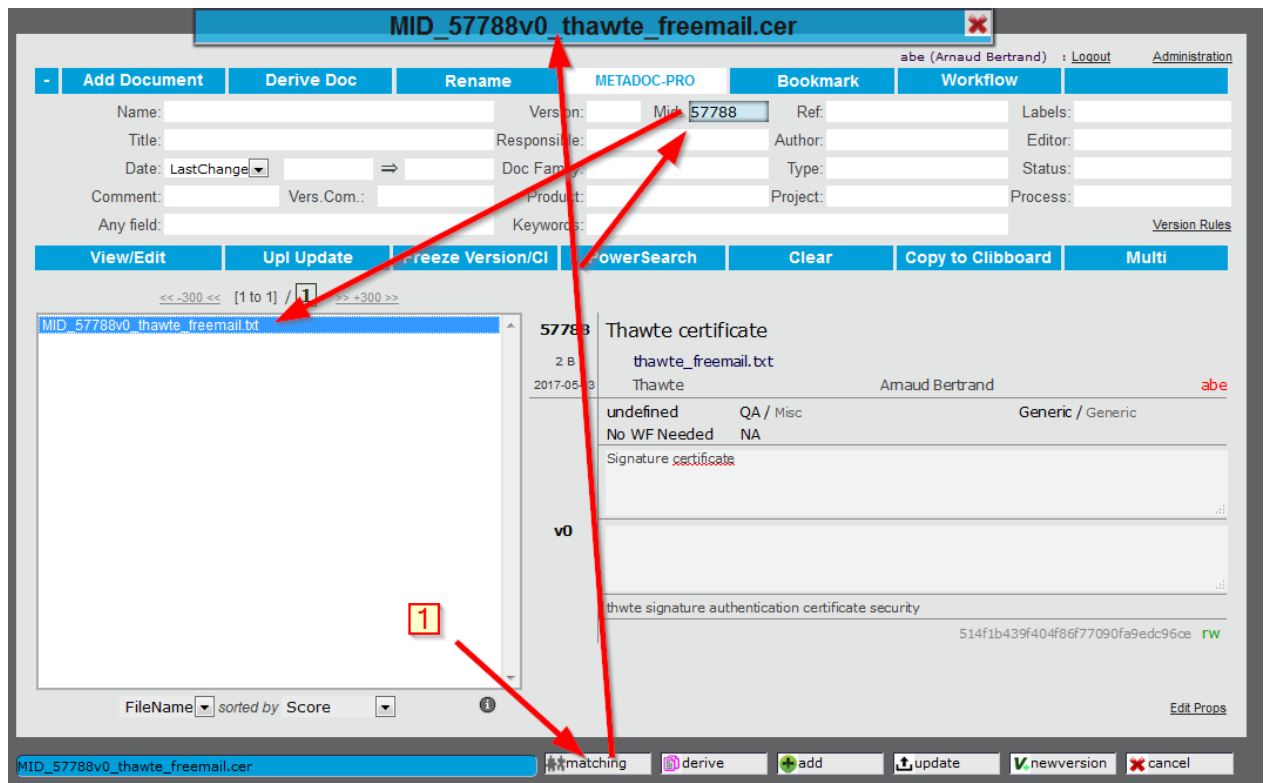
6.1.2 Click on matching

When the user click on matching, whatever the status of the current search, Metadoc will try to match the file with an existing document in Metadoc:

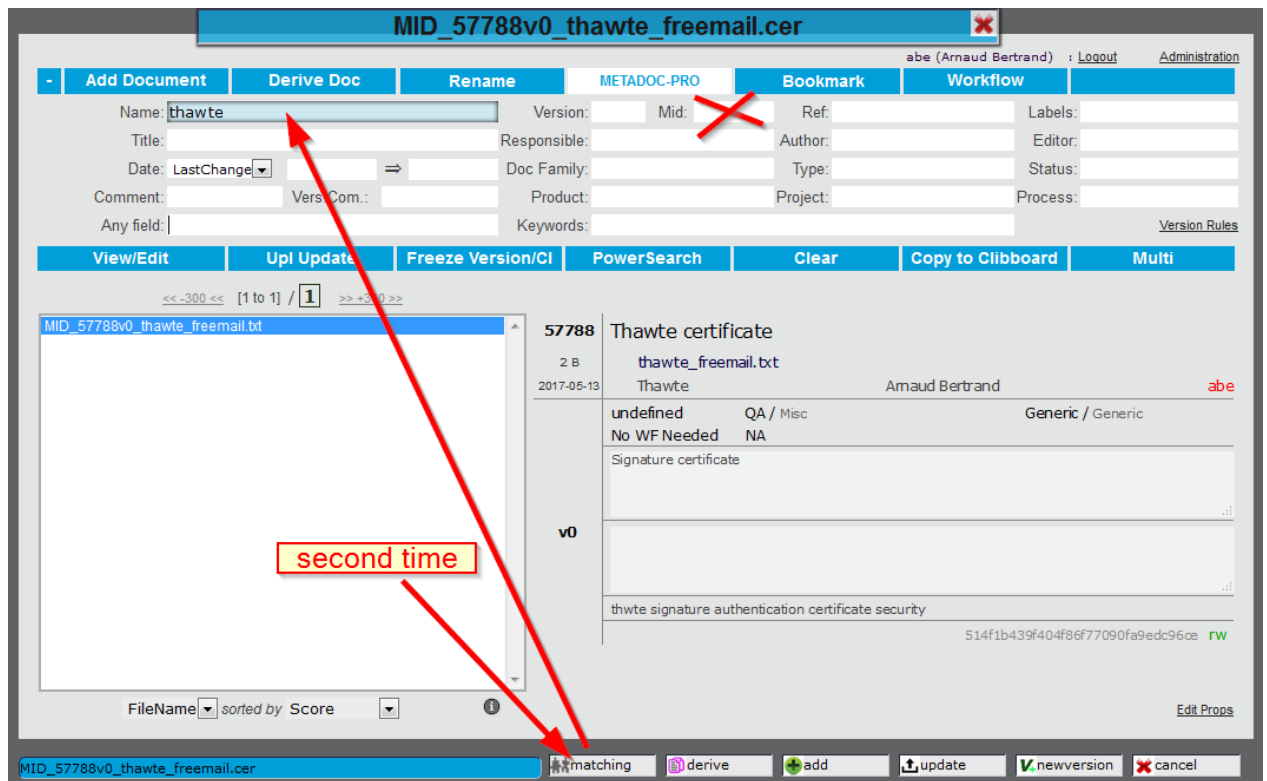
Example, here is the status before the click



Here is the screen after the first click:



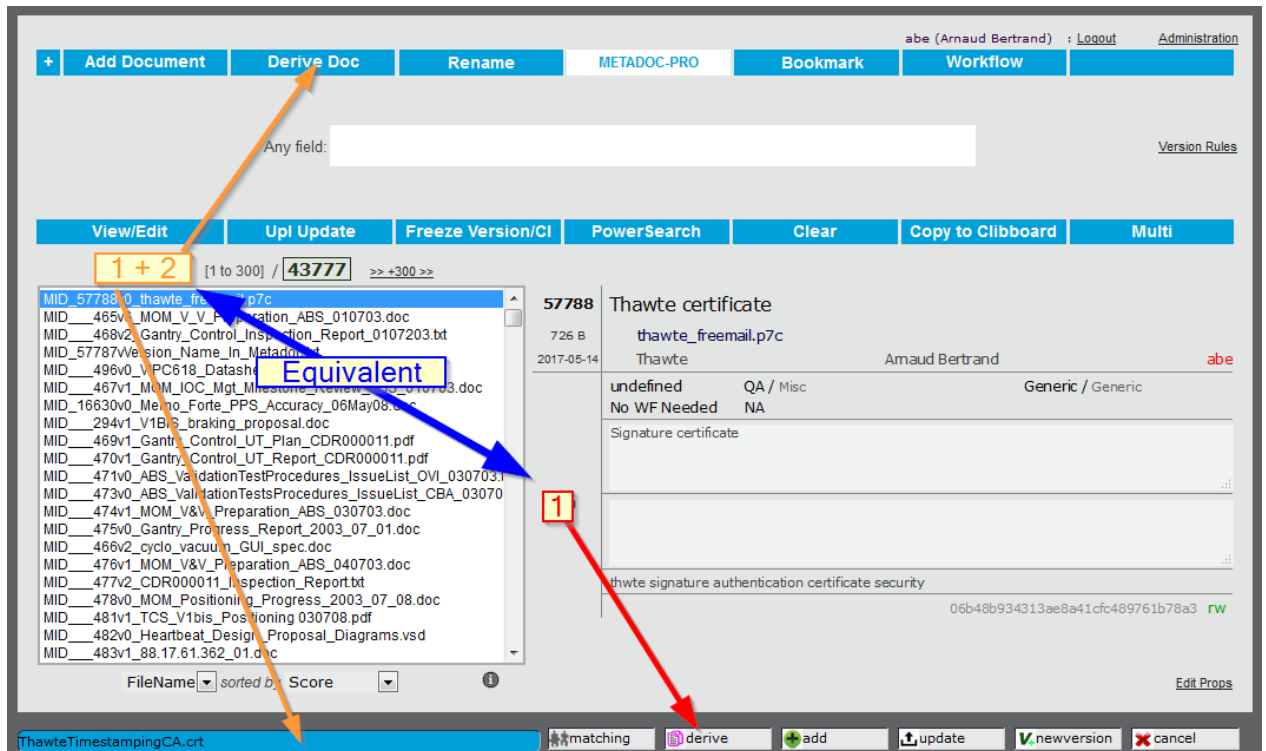
- (1) The user click on “matching”, then the corresponding file appears on the top of the screen as “file in treatment” and Metadoc try to fill fields that match with this filename. In this example, the first one Metadoc tries is “MID”. The results list is, as usual, automatically updated. In this case, the matching is correct but in some case (typically when MID is not the drag&dropped filename) the matching results list is not what the user expected, in this case, the user can re-click and a second trial for matching is done:



The number of trials is function of the filename and the database. When all the possibilities were tried, Metadoc return to an empty search field.

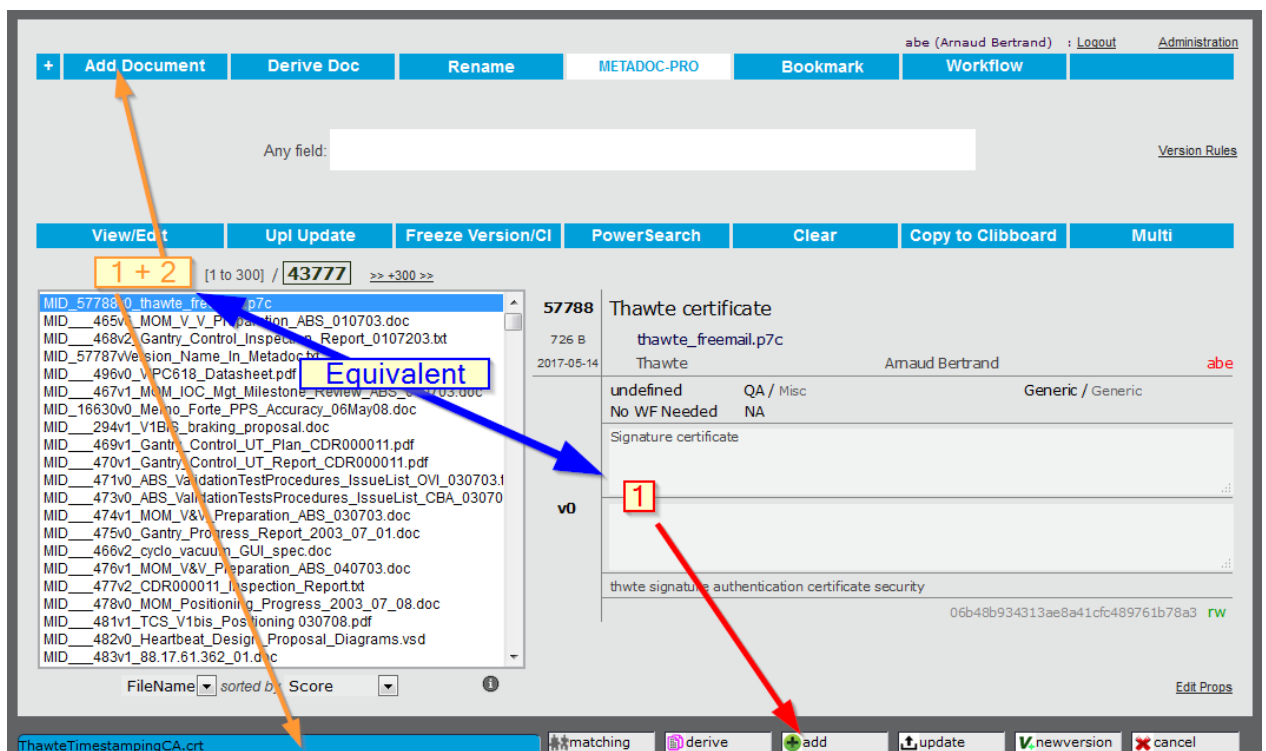
6.1.3 Click on derive on drag&dropped line

This is strictly equivalent to the combination of clicking on filename + clicking on “DeriveDoc” in the main menu. So report to the 6.1.1 for details:



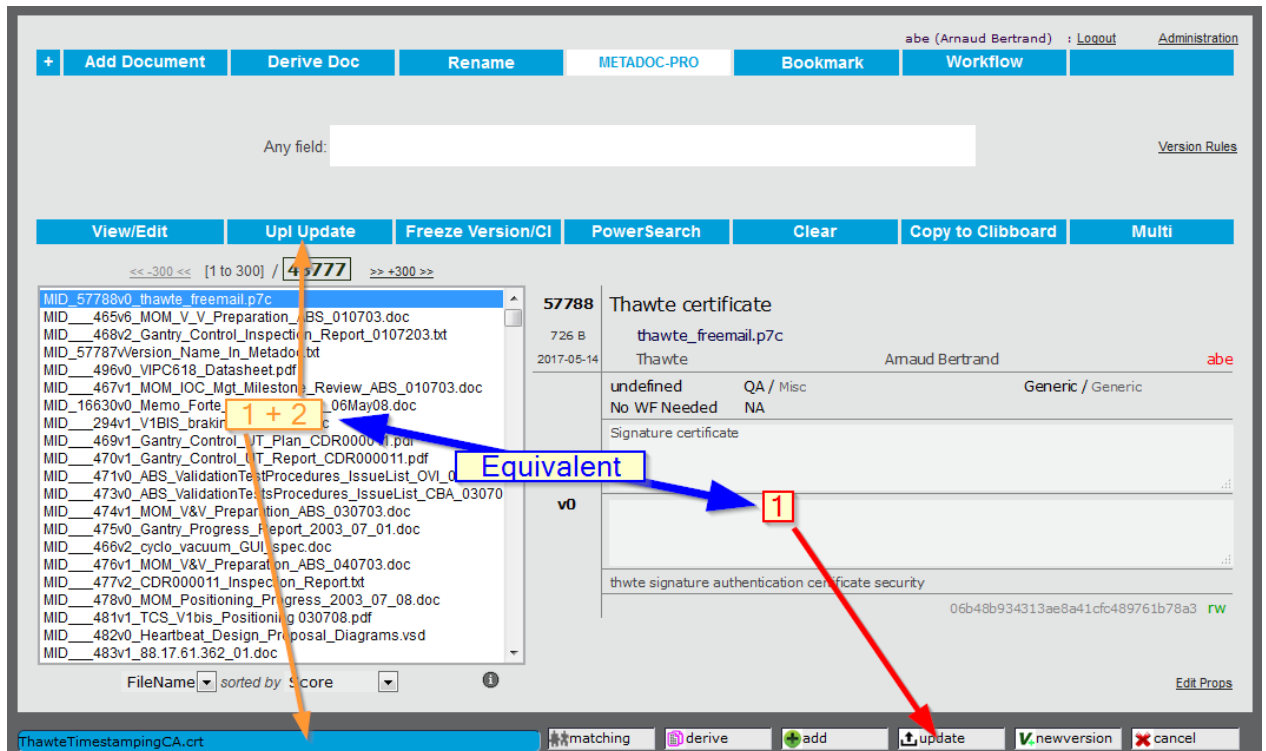
6.1.4 Click on Add on drag&dropped line

This is strictly equivalent to the combination of clicking on filename + clicking on “Add document” in the main menu. So report to the 6.1.1 for details:



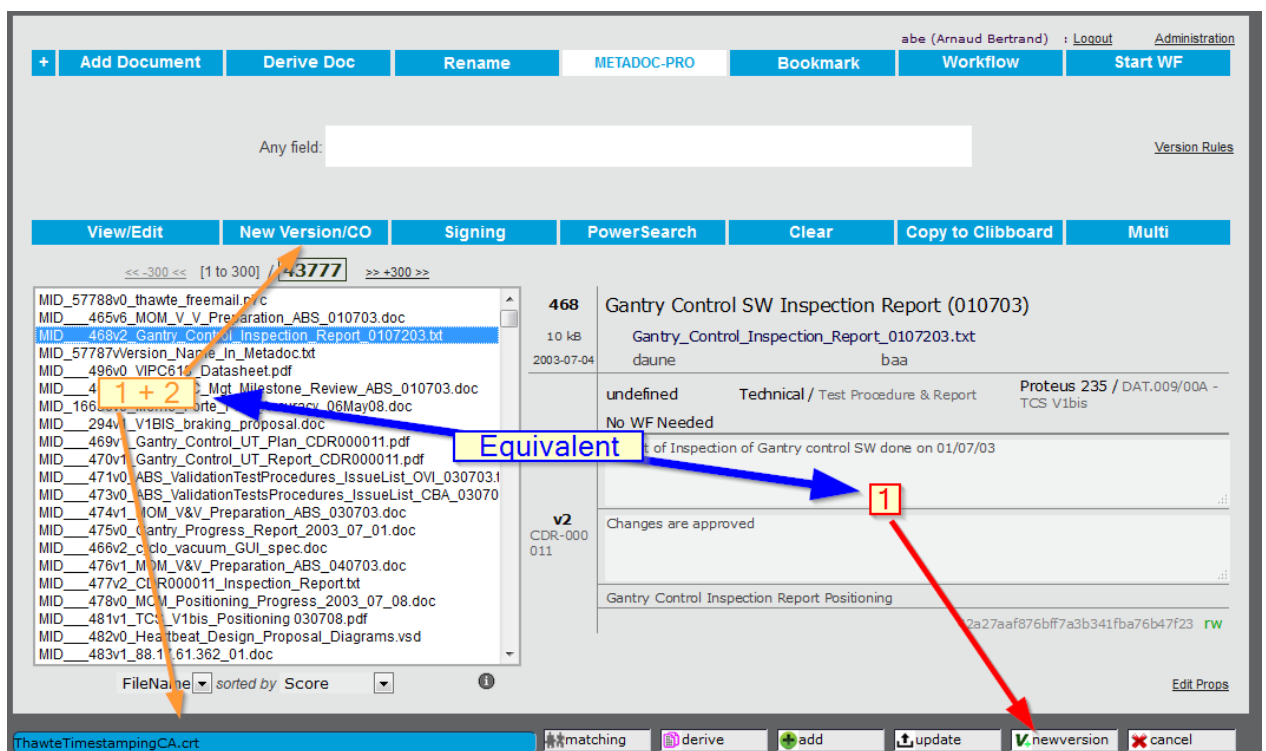
6.1.5 Click on Update on drag&dropped line

This is strictly equivalent to the combination of clicking on filename + clicking on “Up! update” in the main menu. So report to the 6.1.1 for details:



6.1.6 Click on newVersion on drag&dropped line

This is strictly equivalent to the combination of clicking on filename + clicking on “New Version” in the main menu. So report to the 6.1.1 for details:

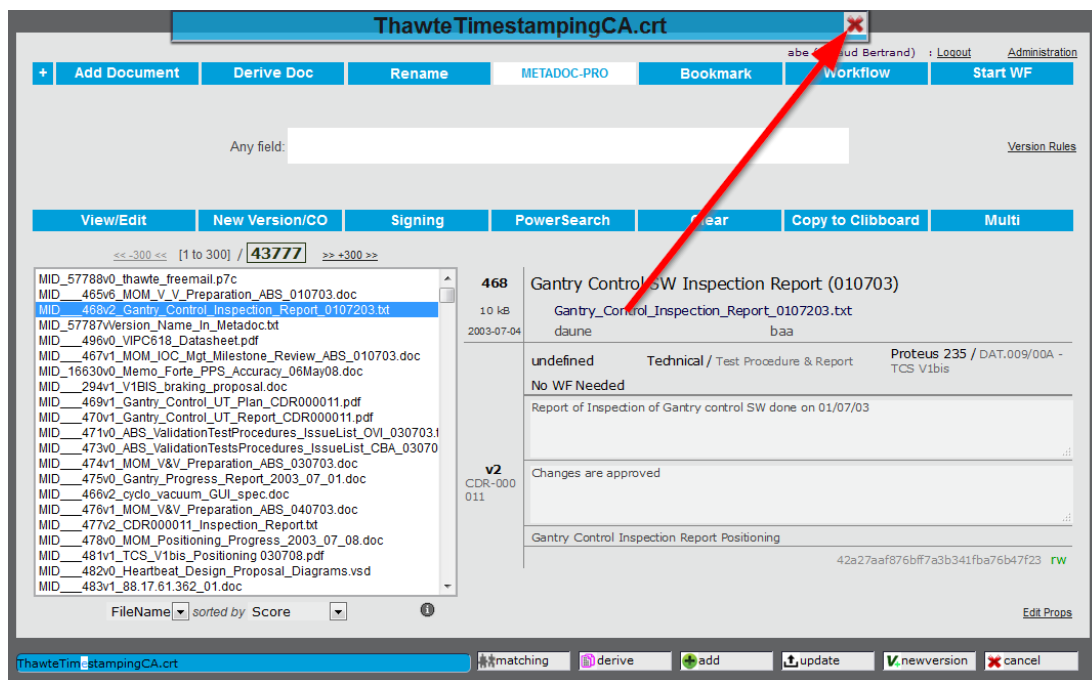


6.1.7 Click on Cancel on drag&dropped line

This cancels any operation on the drag&dropped file. The file is removed from the temporary space of Metadoc and the line disappears.

6.1.8 Click on the cross of the “File in treatment” line

This simply returns to the situation where there is no “File in treatment”. The file is still in the drag&drop zone and can be processed later.

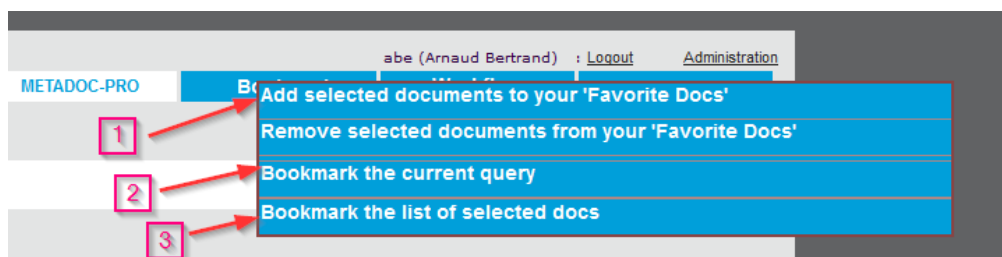


6.2 Bookmarks

It allows the user to save his favorite documents and his favorite queries. There are 2 parts in the bookmarks:

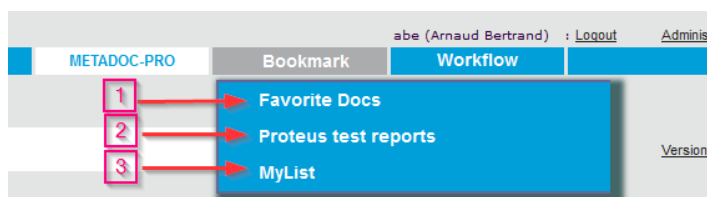
- The favorite documents list
- The saved queries

To add documents or queries in the bookmark, simply right-click on bookmark menu or in the results list zone.



Once the user has right-clicked on bookmark, he can add the “selected documents” to his favorite list. (1) He can also save the query as a named query (all the fields are saved to be called back later) (2). Instead of the favorite documents list, the selected documents can be saved in a “named list” (3). Actually, a named list is nothing else then a particular query that contains only a MIDs list.

To use the bookmarks, simply pass the mouse over the bookmark menu and click on the choice.



The (1) recall the favorite docs list

The (2), (3), ... recall the saved queries and the saved docs list

6.3 Rename

This functionality is used to change the filename of a document (without extension). It can be used to force the extension of the selected version. This is useful when the extension was not correct during the introduction of the documents.

NOTE: all the versions are renamed at once, hence, the user must be an administrator or must be owner of all the versions to be allowed to perform the rename operation.

Version	Owner
0	jorban
1	jorban
2	jorban
3	jorban
4	jorban

New Filename in DB (without extension): fp_saturation_mom.docx

[Rename this document](#)

[Go back to Main menu](#)

To change only the extension of the current version, the user must simply add the extension without changing the basename.

Version	Owner
0	jorban
1	jorban
2	jorban
3	jorban
4	jorban

New Filename in DB (without extension): fp_saturation_mom.pdf.docx

[Rename this document](#)

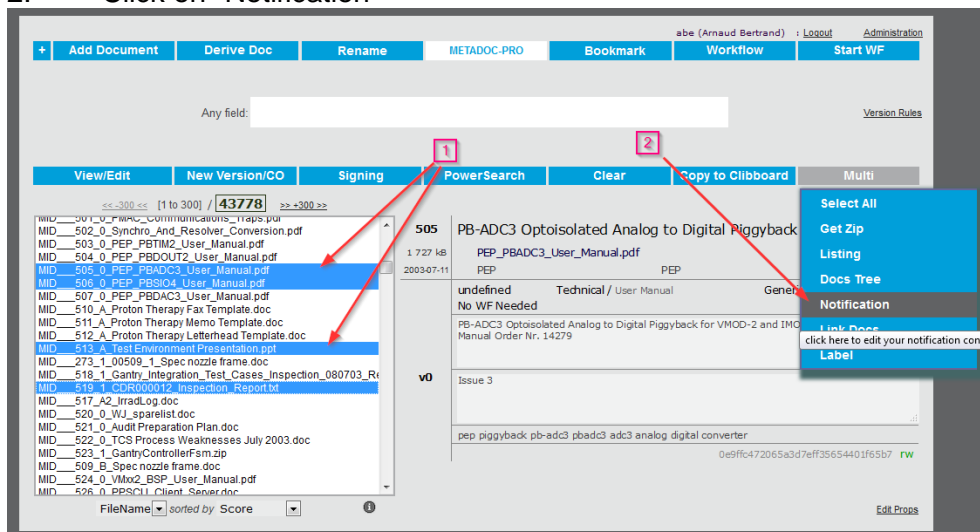
[Go back to Main menu](#)

6.4 Notification

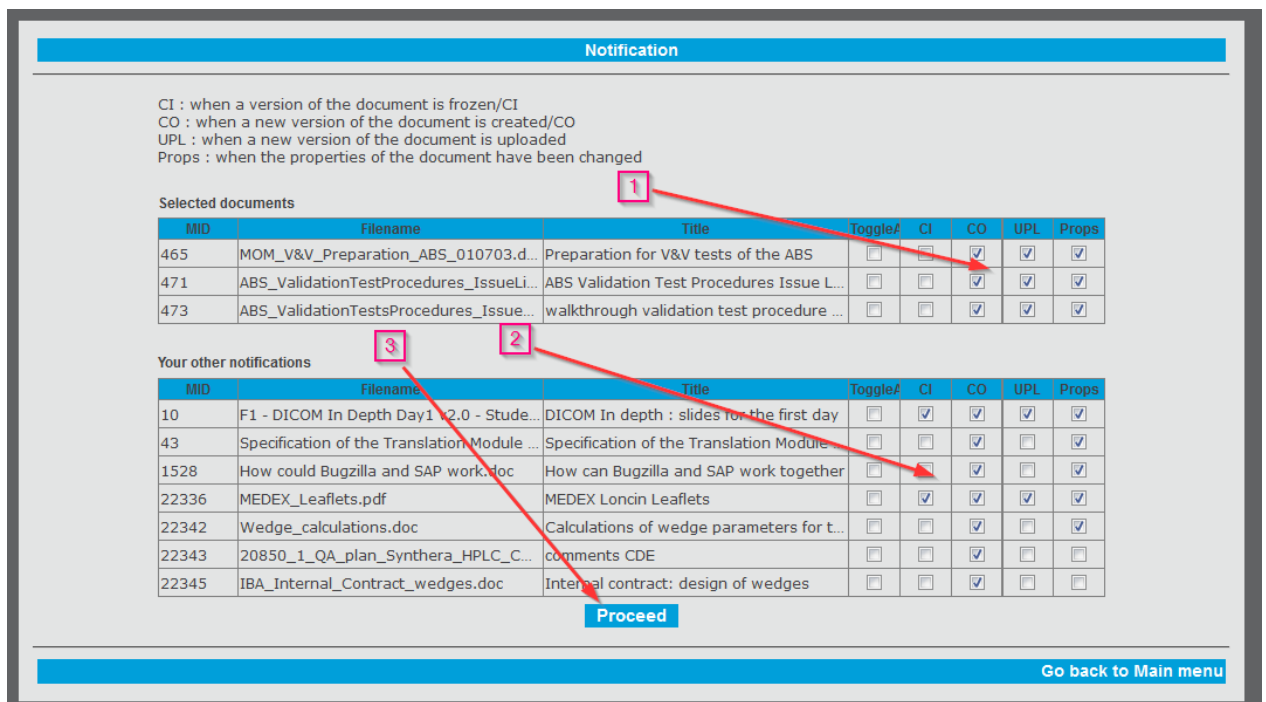
Allows a user to be notified when events occur on documents. Multiple documents can be selected at a time. Events can be chosen among “new version”, “document updated”, “freeze version”, “properties have changed”.

How to proceed ?

1. Select the documents on which you want to be notified
2. Click on "Notification"



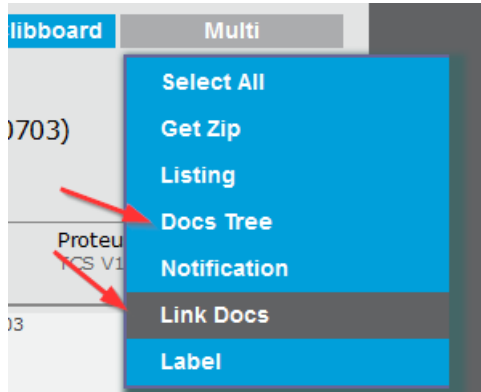
3. Select the events on which you want to be notified (1)
4. Optionally manage the existing notification (2)



5. Click in "Proceed" (3)

6.5 Linking documents and documents trees

“Link Docs” and “Docs Tree” are used to manage and to view the links between documents. Both are located in the Multi submenu.



The links are at document level and are not version accurate.

6.5.1 Principle

The principle is really simple:

Each document can have only one father, each father can have as many children as you want... but on condition that the children do not already have a father: It is thus impossible to have loops.

Each link can of course be removed

6.5.2 Permissions

To make links between documents, the user must have write access to these documents.

6.5.3 Linking documents

To perform links between 2 (or more) documents:

In the main screen, the documents must be selected:

When the list of document ID is known, you can directly filter the documents. To do this, the user has 2 possibilities:

- ☞ type the list of IDs separated by coma in the "Id" search field
- ☞ type "=" followed by the list of IDs separated by coma in the "any field" search field.

Then the user must click on “Link documents”(2) in the Multi Menu:

The screenshot shows the METADOC-PRO interface. At the top, there's a navigation bar with buttons: Add Document, Derive Doc, Rename, METADOC-PRO, Bookmark, Workflow, and Start WF. Below this is a search bar labeled "Any field:". A secondary navigation bar contains: View/Edit, New Version/CO, Signing, PowerSearch, Clear, Copy to Clipboard, and Multi. The Multi menu is open, showing options: Select All, Get Zip, Listing, Docs Tree, Notification, Link Docs (highlighted with a red arrow and label 2), and Label. On the left, a list of documents is shown, with "Gantry control unit test report (inspection CDR-000011)" selected (highlighted with a red arrow and label 1). The right pane shows details for this document, including its draft status and a description.

Then select which one is the father (1) and the children (2):

The screenshot shows the "Link Docs" dialog box. It has a table with columns: Father, Children, Id, and Document Title. The table lists four documents. The first document, "Gantry control unit test report (inspection CDR-000011)", is selected as the father (indicated by a radio button and a red arrow labeled 1). The other three documents are selected as children (indicated by checked checkboxes and red arrows labeled 2). A "Validate" button is at the bottom right, with a red arrow labeled 3 pointing to it. A "Go back to Main menu" button is at the bottom.

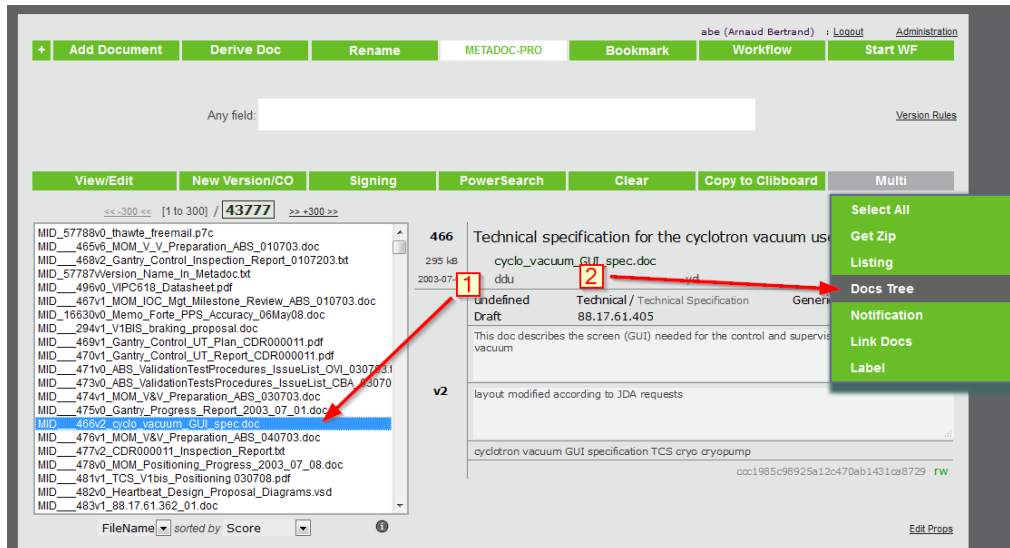
Father	Children	Id	Document Title
<input checked="" type="radio"/>	<input type="checkbox"/>	470	Gantry control unit test report (inspection CDR-000011)
<input type="radio"/>	<input checked="" type="checkbox"/>	473	Validation test procedure for ABS
<input type="radio"/>	<input checked="" type="checkbox"/>	466	Technical specification for the cyclotron vacuum user interface
<input type="radio"/>	<input checked="" type="checkbox"/>	478	Positioning project progress, minutes of meeting of July 08, 2003

AND validate (3).

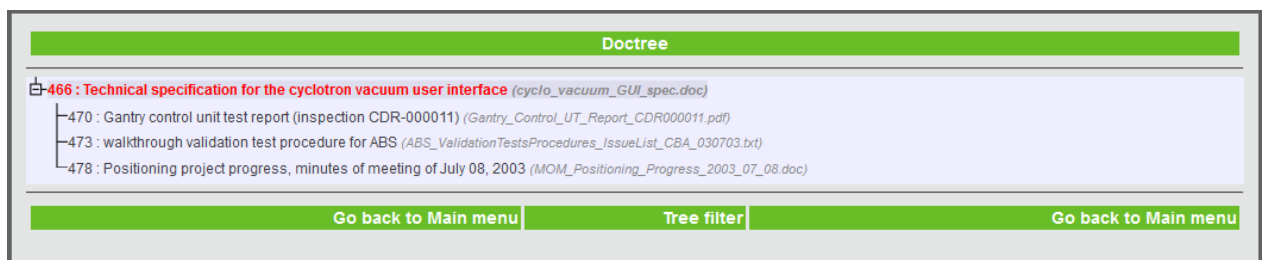
6.5.4 Viewing and filtering a tree:

It is, of course, possible to see the documents trees and to apply filters on them:

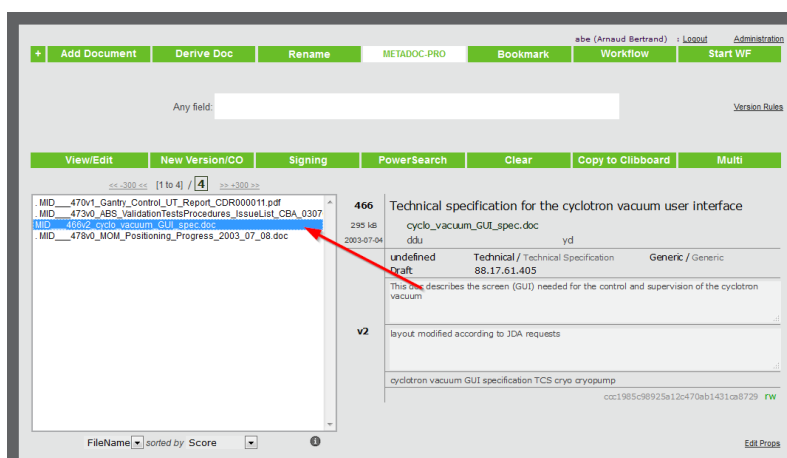
First, select the document (1) for which you want to see the tree and click on “Docs Tree” (2) in the Multi menu:



You will get the tree:



with the initial selected document(s), highlighted in red. The user can click on any document to see its details or you can click on tree filter to return in the main Metadoc screen with the tree where children are indented below the father. By clicking on “tree filter”, you get:



And, if needed, you could refine your search by adding some criteria.

6.5.5 [Removing link\(s\)](#)

To remove the link, simply select the documents (father and children), click on “Link Docs”, **select the father**, and uncheck the checkbox of the children for which you want to remove the link... and validate.

Father	Children	Id	Document Title
<input type="radio"/>	<input checked="" type="checkbox"/>	470	Gantry control unit test report (inspection CDR-000011)
<input type="radio"/>	<input checked="" type="checkbox"/>	473	walkthrough validation test procedure for ABS
<input checked="" type="radio"/>	<input type="checkbox"/>	466	Technical specification for the cyclotron vacuum user interface
<input type="radio"/>	<input checked="" type="checkbox"/>	478	Positioning project progress, minutes of meeting of July 08, 2003

[Go back to Main menu](#)

6.6 [DOCUMENT SIGNATURE](#)

6.6.1 [Overview](#)

The document signature allows any user having a read access to a frozen version of a document to sign it (with or without comments). The server date/time is automatically added to the signature comment.

The signature is compliant to the FDA part 11. A X509 certificate can be used to sign document. It includes the possibility to sign with electronic ID card.

This feature is highly configurable to suit customer needs. (minimum / maximum signature level, settable / unsettable status, ...)

According to the configuration, it is possible to change the status or the version name but must be done with a signature.

Unlike workflows, the signature process does not have multiple steps; the actors are not defined before the signatures; the document will not change anymore.

6.6.2 [The configuration \(for administrators only\)](#)

This part is for administrators only. Many variables are used in the configuration files to define the behaviour of the signature feature.

A document can be flagged as “signed” (on the document detail part of the screen) when it was digitally signed in a workflow (it is not the default behaviour). In the default behaviour, workflow signatures are totally separated from the “direct” signatures. When the parameter is set to one, digital signatures (with X509 certificates) in a workflow are also visible in the “direct” signature and the documents are flagged as signed. So, in the configuration file you will find

```
// -----
// Digital signature parameters
//
// Next parameter has sense for PRO version only
// By default, WF signature are not considered as signature in the result screen
// and in the signature report
// It is however possible to include those signed with X509 in the list by setting
// This parameter to 1
$IncludeX509WFAsSignature = 0;
```

By definition, the *signature* feature is there to officially sign documents. But, in some contexts, customers consider that this “signature” does not have any legal value and that, in this case, a “light” version is more suitable. So, it is possible to configure the minimum and the maximum signature level. However, by default the minimum (and the maximum) is the X509 certificate. So, in the configuration file you will find

```
//
// $MinSignatureLevel=2 // default is X509 certificate
// $MaxSignatureLevel=2 // default is X509 certificate
// signature levels are:
// 0: simple confirmation
// 1: mail only
// 2: mail with X509 certificate
```

Metadoc allows two different behaviours during the signature process about the previous signatures. It is possible:

- To consider only the current signature (independently of the other signatures)
- To include all the previous signatures in the current one (it is the default behaviour)

```
$PreviousSignaturesIncluded = 1 // By default, any signature comments
// includes all the previous one
// (those already signed only)
```

Metadoc allows some users, in the signature process, to change status and/or the version of documents. It is possible to configure which users are allowed to change the document status/version. (All users, Quality officers, Administrators, Super administrators).

```
$SignStatusModifiableBy = 1 | 2; // 1 : Super admin
// 2 : Quality officers
// 4 : Admins
// 8 : Any users
```

Even when signing, the status modification can be restricted. To configure which status can be modified and which status can be set, the configuration file has 2 variables to define these statuses.

```
$SignStatusSettable = array(1, // Informal
2, // Work in progress
3, // Draft
5, // Reviewed
8, // Approved
9 // Repudiated
)
$SignStatusUnsettable = array(1, // Informal
2, // Work in progress
3, // Draft
5, // Reviewed
8, // Approved
9 // Repudiated
)
```

In case of id change (official certificate changing, new e-mail addresses,...) it could be necessary to accept this change without invalidate the previous signatures. A config variable has been introduced in version 3.14.0:

```
$MultiIdAllowed = 0; // In case of identity mismatch, when it is
// 0: you get an error
// 1: you get only a warning
// 2: it is accepted without warning
```

6.6.3 [The signature procedure](#)

The procedure to sign a document is extremely simple. To sign a version of document, this version must be frozen (checked-in).

- Click on the “Signing” button (that appears on the middle bar menu when a frozen document is selected).

Document signature

'Liste mouvements bancaires ABALGO' [34v0609 : liste_mouvements_ABALGO.xls]

Document ID : 34 Version: 0609
Document Title : Liste mouvements bancaires ABALGO
Document Filename : liste_mouvements_ABALGO.xls
Document Status : Informal
Document MD5 : 74778fa7bea8d64582c53a3be7dd81a8

Signature comment

Change status from Informal to Informal and from Version 0609 to 0609

Tuesday 26 October 2010, 17h09 (GMT -0500)

>>> Sign <<<

Go back to Main menu

- In the signature screen, you have to write your signature comment (e.g. “Read and approved”). According to the configuration, it is possible that the previous signatures are displayed or not. It is done for information only.
- Optionally, and according to your rights, you have the possibility to change the status of a document.
- Just click on the sign button.
- A mail is sent to your e-mail address and the browser displays the document signature status. It checks every 30s if you have returned the e-mail.
- You have simply to sign digitally this e-mail with your mail tool and return it within 24 hours.
- The signature process is finished, only when you have seen in the signature status screen, that the signature is recorded within metadoc. This operation must be done within one day.

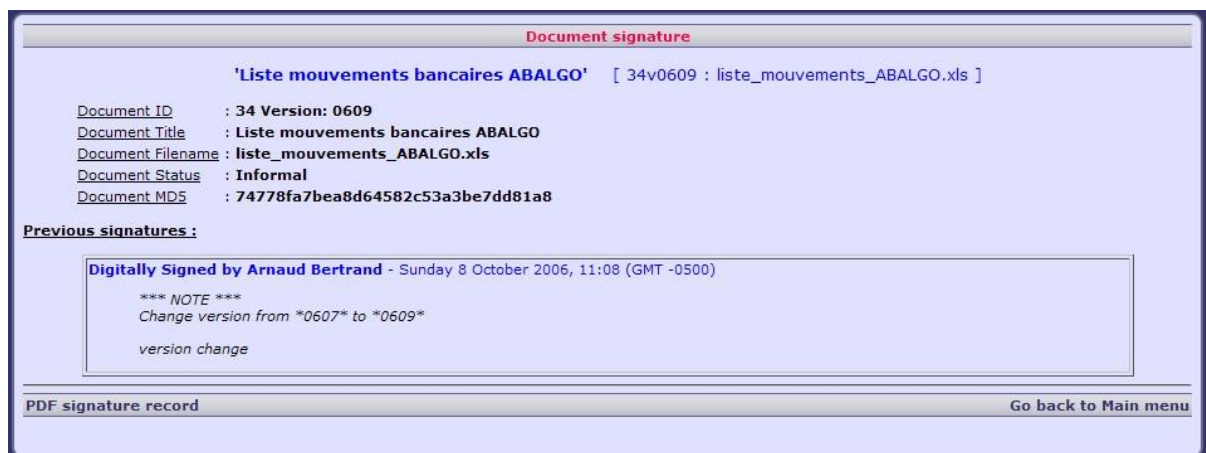
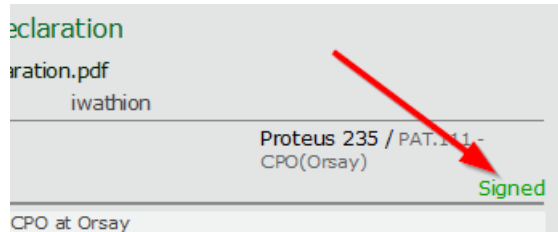
You can go to the signature status screen by selecting the document and clicking on the signature status textbox:

6.6.4 The signature record

Once in the signature status, the previous recorded signatures appear in blue, the pending signatures (waiting for a mail) appear in red.

If there is a pending signature, this screen is refreshed every 30s to allow metadoc to check whether a signature is coming by e-mail.

When a document is signed (or pending signature), you can double click on the signatures field to open the signature record screen:



From this screen, it is also possible to get a pdf document called the signature record. This document contains the main information about the document and the signature(s).

6.6.4.1 Example of pdf signature record



7 USE METADOC STEP BY STEP

7.1 Initial operation

The first thing to do is to request a metadoc account and then, create your “metadoc workspace” directory which must be really easy to access (e.g. on your desktop).

7.2 Day to day operations

All documents should be inserted as soon as possible into the system.

1. A document is created/uploaded (see the section Add Document or Derived Document), the original source (if any) must be (manually) renamed with the prefix “__metadoc__”.
2. The document has the status “editable” and can be modified and uploaded as often as the editor wants.
3. After each upload, the properties can be updated if needed (actually at any moment).
4. When the document is delivered (for review, for approval, for a baseline,..), the version must be frozen.
5. A new version of this document can only start if the previous version is frozen.
6. When a new version is created, the status is “Editable” and we start over at point 2
7. When a document is checked-in, it can
 - Simply stay as is.
 - Be signed with comments.
 - Be involved in a workflow (in the pro version only).

8 WORKFLOW MANAGEMENT (PRO VERSION ONLY)

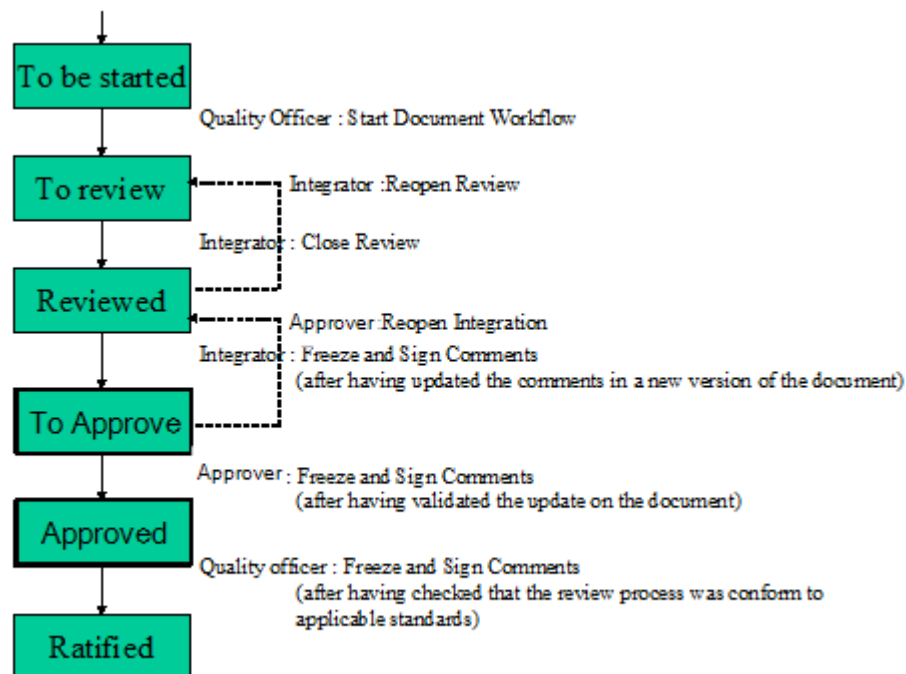
Metadoc PRO version only provides workflow management compliant to the FDA part 11. Purpose of this workflow management is to support the verification and approval activities related to documents stored within Metadoc.

A workflow is initiated by 'the owner' that must define the actors involved in this document workflow (reviewers, integrators, approver, quality officers).

8.1 Principles

8.1.1 Workflow supported by Metadoc

The nominal state transitions provided by Metadoc's workflow management have been described in the following figure.



Several roles are involved during the workflow management:

- the **owner** of the document has to initiate the workflow, by defining the adequate workflow parameters.
- the **reviewers** are in charge of reviewing the document, providing comments and remarks on the document.
- the **integrator** generates a new version of the document (the target version) in which the comments and remarks provided by the reviewers are integrated, according to a review process. A review report, formalizing the comments provided by the reviewers, can also be input and signed by the integrator.
- the **approver** checks that the updates performed on the document by the integrator are compliant with the comments / remarks given during the review process. It is the technical responsible of the document and should be always reviewer to.
- the **quality officer** has multiple roles: starts, Follows and finally approves that the process used to review the document is conform with the expectations; the quality officer belongs always to the "Quality" group. For a validation

The actions expected / possible during the workflow management have been described in the following table :

> > Start Workflow < <	<p><u>Description:</u></p> <p>A workflow can be initiated on any document in Metadoc, provided it has been frozen (checked in). In order to initiate the workflow, the document owner (or any Metadoc user authorized to update Metadoc properties) needs to click on "<<<Start Workflow>>>" and to input parameters required for the workflow management.</p>
To be started	<p><u>Description:</u></p> <p>The workflow has been initiated by the document owner; workflow parameters need to be approved by the Quality Officer. This step may be automatic for some documents category, according the configuration file.</p> <p><u>Possible actions:</u></p> <p>Start document workflow : reserved to the <u>Quality Officer</u> To approve the parameters of the workflow on this document. As a result of this action, both document and workflow status are set to "To review"</p> <p>Edit workflow: to modify the input parameters</p> <p>Cancel workflow: to cancel the workflow. As a result of this action, workflow status is aborted and document status becomes WFCancel</p>
To review	<p><u>Description:</u></p> <p>During this phase, each reviewer is expected to input comments on the document. Those comments are either input directly on Metadoc or as a specific comment document.</p> <p><u>Possible actions:</u></p> <p>View/Edit/Sign comments: Reserved to the Reviewers and Document Owner to input manage comments on the document and to sign those comments, once complete.</p> <p>Close review: Reserved to the <u>Integrator</u> to close the workflow as soon as the required review comments have been provided. As result of this action, both document and workflow statuses are set to "Reviewed"</p> <p>Cancel workflow: to cancel the workflow. As a result of this action, workflow status is aborted and document status becomes WFCancel</p>
Reviewed	<p><u>Description:</u></p> <p>During this phase, the comments provided by the reviewers are consolidated and integrated in a new version of the document.</p> <p><u>Possible actions:</u></p> <p>Reopen the review: Reserved to the <u>integrator</u>. He has the possibility to reopen the review process</p> <p>Create Target Version: Reserved to the <u>integrator</u> to load in metadoc a new version of the document, based on the comments of the reviewers. This new version is called "<TargetVersion>Candidate".</p> <p>View/Edit/Sign comments: Reserved to the Integrator to enter additional comments on the workflow (e.g. a review report, summarizing the accepted and rejected review comments). Once the comments have been frozen and signed, both workflow and candidate target documents are set to "To approve"</p>

	<p>Cancel workflow: to cancel the workflow. As a result of this action, workflow status is aborted and document status becomes WFCancel</p>
To approve	<p><u>Description:</u> During this phase, the approver checks that the review comments have been correctly integrated in the new version of the document. He is the technical responsible of the document.</p> <p><u>Possible actions:</u> Reopen the integration: Reserved to the <u>approver and the QA</u>. He has the possibility to reopen the integration process (he cancels the signature of the integrator!) View/Edit/Sign comments: Reserved to the Approver to enter additional comments on the workflow, intended To approve that the new version of the document integrates comments provided by the reviewers. Once those comments are frozen and signed, both workflow and candidate target documents are set to "Approved" Cancel workflow: to cancel the workflow. As a result of this action, workflow status is aborted and document status becomes WFCancel</p>
Approved	<p><u>Description:</u> During this phase, the quality officer checks that the workflow has been correctly applied. This phase may be automatic for some kind of documents according to the configuration file.</p> <p><u>Possible actions:</u> Reopen the validation: Reserved to the <u>the QA</u>. He has the possibility to reopen the validation process (he cancels the signature of the approver!) Ratify workflow: Reserved to the Quality Officer to ratify that the workflow is compliant with the applicable workflow management process (right reviewers, required records available, ...). Once the workflow has been ratified by the quality officer, <ul style="list-style-type: none"> the workflow status is set to "ratified" the document version is set to the target version the document status is set to approved. Cancel workflow: to cancel the workflow. As a result of this action, workflow status is aborted and document status becomes WFCancel</p>
Ratified	<p><u>Description:</u> The workflow is successfully closed and all data related to the workflow are still available.</p>
Cancelled	<p><u>Description:</u> The workflow is closed but cancelled and all data related to the workflow are still available.</p>

At any moment, the owner of a workflow, a quality officer involved in the workflow or a super-administrator can add new actor in a workflow. It can be necessary when an actor has left the company before the ratification of a workflow.

8.1.2 [Electronic signature](#)

To close a step of a workflow, the actor must "confirm" his action. This "confirmation" is configurable and can be either a simple confirmation click, an e-mail confirmation or a digital signature.

The metadoc administrator defines the minimum and the maximum usable security level. he may also define a dedicated level for each workflow transition. These setting are done in the configuration file. Each user can then choose a security level between the configured minimum and maximum. The possible security levels are:

- Simple confirmation : the lowest level, a simple click to confirm. The system assumes that the current logged user is the correct one.
- Mail confirmation only : the medium level. The system sends an e-mail to the person logged and is waiting the valid answer of this person to accept the confirmation.
- Digitally signed e-mail. The highest level, FDA 21cfr11 compliant. The system send an e-mail to the logged user and is waiting the valid answer digitally signed with an X-509 certificates to accept the confirmation.

Electronic signatures on Metadoc are based on the electronic signatures features included in the most common E-mail utilities (like MS Office). Each time somebody needs to sign electronically a document or an approval, he will receive an E-mail asking him to return this E-mail signed, to the sender of the E-mail. After having validated the content of the returned E-mail and the electronic signature, Metadoc stores this validated signed E-mail and considers the document or approval has been formally signed.

The e-mails are stored and check dynamically each time a detailed workflow is displayed.

8.1.3 [Configuration of the Workflow management](#)

The workflow management functionality is configured using a number of parameters. Modifying the configuration parameters used on Metadoc can only be performed by the administrator of Metadoc.

The following behaviors can be controlled by parameters:

- Usage or not of e-mail notification
- Selection of pop3/imap mail server
- Definition of C.A. certificates. These are the certificates of trusted organisms. All gthe X-509 certificated of metadoc users must be generated by one of those C.A.
- The minimum number of reviewers and approvers for formal review
- The categories for which the start phase is automatic and the users or groups to be notified when this phase skip occur.
- The categories for which the ratification phase is automatic and the users or groups to be notified when this phase skip occur.
- The users or groups that can act as QA for categories for which start phase and ratification phase is automatic (and no QA is defined)
- The default delay for review and validation: these values are used by default when a new workflow is started
- The reminder parameters: Defines the delay from which action reminder e-mail must be sent before the target date is reached and the number of days to continue to sent the reminder e-mail after the target date is reached (and action is still possible).

- The confirmation level configuration: It is possible to configure the confirmation level (click, mail or x-509 signature) globally and/or for each role, by giving, optionally the min and/or the max confirmation level. So, it is easy to configure the system to force reviewer to use simple confirmation only, to force QA to digitally sign independently of the user configuration and to use the user choice for other steps of a workflow. The priority order is the following: confirmation level of role, global confirmation level, user confirmation level.

The chapter 11 is a dump of the configuration file in which all the parameters influencing the workflow behavior are defined.

To activate the reminder, the following command must be added:

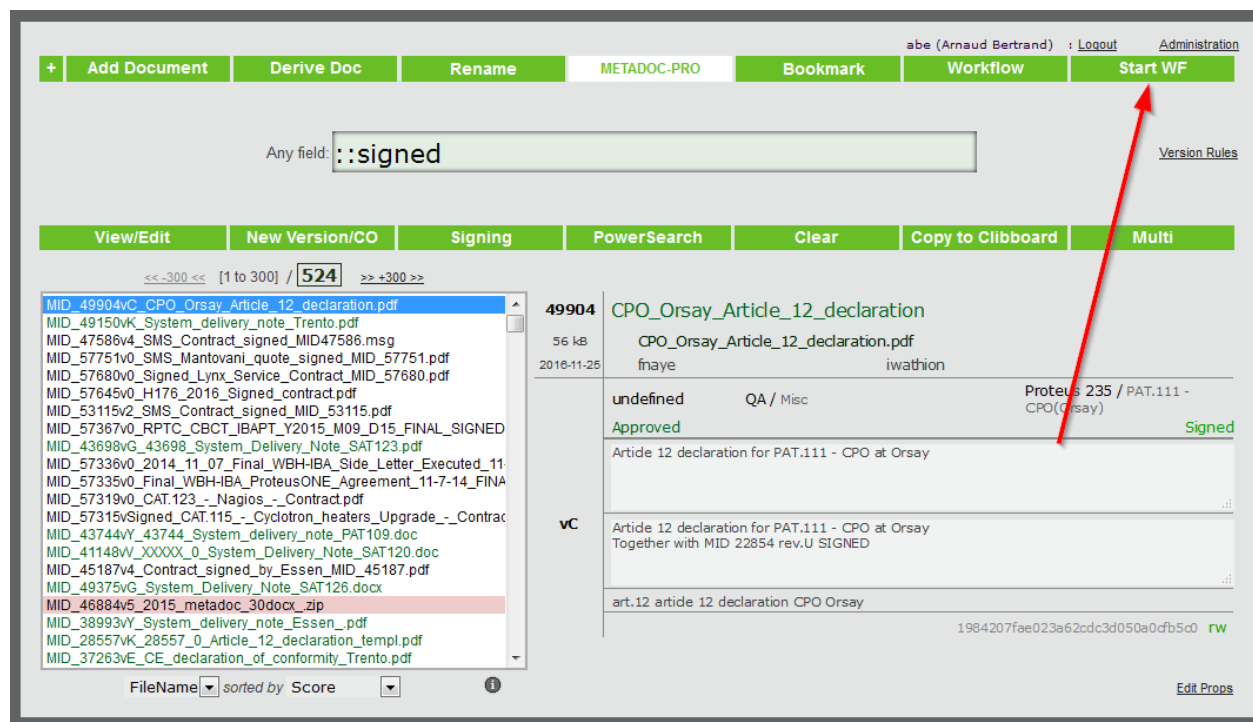
For unix system: in crontab “cd <metadoc pro php dir>; <php path> -q workflow_reminder.php”

For windows: in the task scheduler : “<fullpath to php.exe> -q workflow_reminder.php” (in <metadoc-pro> php directory)

8.2 Start Workflow

8.2.1 Start Workflow screen

Any Metadoc user can start a workflow on a document, by clicking on “Start Workflow” button on the main screen.



Condition to start a workflow:

- All versions of the document must be checked-in (no editor)
- No workflow already started on this document;

Following form needs then to be filled out:

Start document workflow

CPO_Orsay_Article_12_declaration [49904vC : CPO_Orsay_Article_12_declaration.pdf]

Kind of workflow : ☒ formal review & approval 1
☐ informal review

Target version : D 2

Target review date : 2017-05-28 3
Target approval date : 2017-06-04 4

See only users of groups : Any Group 5
User filter : us

Login	Name	Reviewer	Integrator	Approver
abe	Arnaud Bertrand	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
jpcusan	Jean-Paul Christian Usanase	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
new	new user	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nui	Normal User Involved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
nuni	Normal User Not Involved	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
test	test user	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6 Selection Done

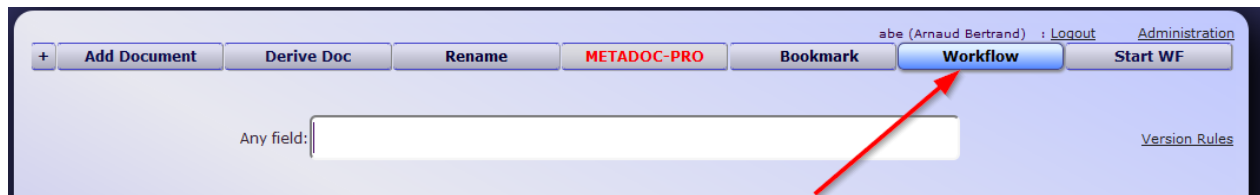
[Go back to Main menu](#)

8.2.2 Fields description

- **Kind of workflow (1):** Identifies the type of workflow
- **Target Version (2):** Identifies the version of the document, after approval. A proposal is automatically done by the tool according to the rules defined by the administrators in the configuration file.
- **Target review date (3):** What is the due date for the comments to be provided by the reviewers ? Allows Metadoc to send automatically reminders to those reviewers that are late.
- **Target approval date (4):** What is the due date for the approval of the document ? Allow Metadoc to send automatically a reminder to the actors that are late.
- **The actors (5)**
 - **Reviewers:** Who should review the document ?
 - **Integrator :** Who will summarize comments and generate a new version of the document ?
 - **Approver :** who checks that the updates performed on the document by the integrator are compliant with the comments / remarks given during the review process. It is the technical responsible of the document and should be always reviewer to.
 - **Quality Officer:** Who will check that the workflow has been managed according to the applicable procedure ? Only members of the "Quality" group can be appointed as Quality Officer.

8.3 Manage Workflows

8.3.1 Workflow manager screen



When the **Workflow** function is selected on the main screen, the following workflow management screen is displayed.



The upper part of the screen (the workflow filter) and text boxes at the top of each column are used to filter the workflow listed on the lower part of the screen. This list is dynamically updated according to the entry. By clicking on the column title, it is possible to sort the workflows ascendantly or descendantly (by clicking twice) according to the content of the column.

The “display limit” parameters limits the number of workflows displayed on the screen.

The “filter preselection” allows users to save their favorite queries. This feature is detailed in the chapter 8.3.1.2

8.3.1.1 The search fields

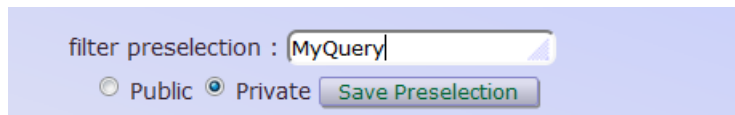
- Document id : unselected by default, it is used to show workflow(s) performed on the document id referenced in the dedicated text box. This text box contains, by default, the id of the document that is selected in the main Metadoc screen.
- “Only review processes you are involved in” : selects all the workflows in which the connected user is involved whatever its role is.
- Kind of workflow: selects the kind of workflow to filter. When no kind is selected, the “kind of workflow” criterion is not taken into account.

- Status of the workflow: probably one of the most important filter. It allows the user to see only workflow in the requested status. When no status is selected, the “status” criterion is not taken into account.
- The dates interval: to see only the workflows in this dates interval.

8.3.1.2 The preselection entry

With this entry, it is possible to save or recall your favorite filters.

To save a preselection, you need only provide a name (that is not used yet) and click on "save" as shown on the following figure:



You can decide if the preselection is private (only visible by you) or public (available for all users).

To recall a preselection you can type its name in the field, or you can type a part of its name and double click on the field (or press the down key) and select it in the drop down list.



The filter fields associated with the preselection are automatically filled in and the filter is directly applied.

You can delete a preselection by clicking on the delete button when it is active.

8.3.2 Workflow details

Workflow details are displayed on the following screen:

Workflow details

Formal validation process. Target version : A

'IBA test report of the twins BPMEU 000GNV & 000GNW' [5910 v0 : TPR_BPMEU_000GNV_000GNW.doc]

Workflow ID : 2149 Target review date : 2004-11-05 Target validation date : 2004-11-12

Workflow status: Validated

Name	Comment	Signed	Last action
Owner :			
pp (Pascal Pelerin)	-	-	-
Reviewer :			
if (Isabelle Fameree)	YES	Signed Id change Warning	2004-12-16 12:17:37
pla (Philippe Lahaut)	YES	Signed Id change Warning	2004-11-02 11:10:03
View compiled comments			
Integrator :			
pp (Pascal Pelerin)	YES	Mail	2005-01-07 14:09:50
Validator :			
if (Isabelle Fameree)	YES	Signed Id change Warning	2005-01-10 14:51:11
Quality Officer :			
pla (Philippe Lahaut)	-	-	-

Action you can take

As any member
View the original document [MD5: 84b317db19d9869e2e00af483d5183b1]
View the target document [MD5: 84b317db19d9869e2e00af483d5183b1]

As Reviewer
No action can be taken anymore

As Quality Officer
Edit this workflow (date/actors)
Ratify this workflow
Cancel this workflow

PDF report Return to workflow selection Go back to Main menu

The workflow details screen is split in three parts:

- On the upper part of the screen, the basis information on the workflow is presented (target version, target review and validation dates)
- On the medium part of the screen, the detail information on the current status of the workflow is presented: who are the actors on the workflow ? have those actors already input and signed their comments ?
- On the lower part of the screen, all actions the logged in user can take are displayed, taking into account of the current status of the workflow.

8.4 Comments compiler

The comment compiler is a tool that allows to summarize the comments entered by all the reviewers. To use it, the variable **\$UseCompiledComments** must be set to 1 in the config file.

To be understandable by the comment compiler, the comments must follow some syntax rules:

In the *comments* field, the syntax of each comment must be:

```
Index1;index2;severity: the comment
line2
line3
```

Where index1 is a **numerical** index, (e.g. the page number), index 2 is a secondary **numerical** index (e.g. the line number) and the severity (typo, minor, major,...).

Note the semicolon and the colon that are used to separate the numerical indexes, the severity and the comment itself.

A comment is ended by an empty line or by the next comment.

Line beginning by the '#' symbol are ignored.

Here is an example of comment:

```
2;5;typo: "imformation" must be "information"
        "could be" must be "could be"

5;19;major:
This is not a linear progression, this is exponential!

23;0;minor: this page should be rewritten.
A schema should help the user to understand better
than the text explanations.
```

Assume another user has entered the following comments:

```
2;5;typo: "imformation" is not correct
3;10;typo: "retun" instead of "return"
7;0;major:
Chapter 4 must be removed

No other comment.
```

Once each user has entered his comments, the comments compiler allow a synthetic view of the comments. The comments can be sorted by index, submitter and severity by clicking on the title of the column.

Review comments

Workflow ID : 8906
'aucune idee' [22329 v0 : 363-2008-24-6.pdf]

Formatted comments

Index	Severity	Author	Comment
2 / 5	typo	abe	"information" must be "information" "could be" must be "could be"
2 / 5	typo	acolby	"information" is not correct
3 / 10	typo	acolby	"retun" instead of "return"
5 / 19	major	abe	This is not a linear progression, this is exponential!
7 / 0	major	acolby	Chapter 4 must be removed
23 / 0	minor	abe	this page should be rewritten. A schema should help the user to understand better than the text explanations.

Unformatted comments

Author	UNFORMATTED COMMENTS (ignored by the compiler)
abe	ch2;line3;high: malformed comment
acolby	No other comment.

close

9 ADMINISTRATION

According to your rights, you can see or not the different sub-menus:

9.1 User Admin as normal user

This menu is used to change the account information and the theme preference

The screenshot shows the top navigation bar of the METADOC-PRO application. The user is logged in as 'fva (Frank Vandenbroecke)'. The navigation bar includes buttons for '+', 'Add Document', 'Derive Doc', 'Rename', 'METADOC-PRO', 'Bookmark', 'Workflow', and 'Start V'. A red arrow points to the 'User Admin' link, which is located next to the 'Start V' button. Below the navigation bar, there is a search field labeled 'Any field:' and a 'Version Rules' link.

User Administration

Setting of user: fva

Real Name: (e.g. A. Bertrand)

Email: (e.g. arnaud.bertrand@abalgo.com)

EID Number (national number): (e.g. 70031607789)

Hint display: ☒

Theme:

Confirmation level:

(optional)

Old Password:

New Password:

Confirm New Password:

PLEASE, DON'T FORGET TO READ THE META-DOC USER MANUAL
(it will be automatically placed at the top of your last used documents)

Group	Member	Admin
1_Corporate_Mgmt		
2_BU_Mgmt		
3_Middle_Mgmt	X	
4_Users	X	
5_Public		
DefQA		
IR		
QA		
test		

9.1.1 How to change user information

In zone "1", a normal user can modify his real-name, his e-mail address, his EID (used for digital signature) and its preferred theme. The user can configure if a hint must be displayed for each menu and also the confirmation level.

This confirmation level will be his default one if it is compatible with the global configuration. Of course, if the confirmation level is out of range, the highest is taken into account:

The possible levels are the following:

1. Simple confirmation
2. E-Mail
3. X509 digital signature

Example 1: User confirmation level is 1
Site confirmation level range is [1,3]
=> 1 is used

Example 2: User confirmation level is 2
Site confirmation level range is [1,3]
=> 2 is used

Example 3: User confirmation level is 2
Site confirmation level range is [1,1]
=> 1 is used

Example 4: User confirmation level is 2
Site confirmation level range is [3,3]
=> 3 is used

Example 5: User confirmation level is 1
Site confirmation level range is [2,3]
=> 2 is used

9.1.2 [How to change the password](#)

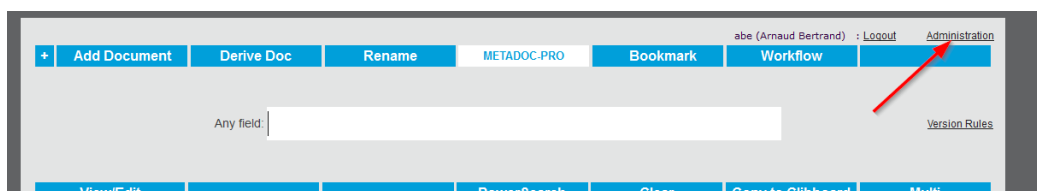
In zone "2", the user can change his password. He has to enter his old once, his new one and confirm his new one, then, click on one of the "validate" ("4" on the figure) button.

9.1.3 [Group information zone](#)

For a normal user, zone "3" is an information zone that show the status of the user in regard of the different existing groups.

9.2 [Administration as administrators \(or super-administrators\)](#)

As administrator, the menu is a little bit different and you see the following:



The only difference between administrator and super-administrator is the recycle-bin menu which is present only for super-administrator. Thus both are explained together.

9.2.1 [Add new user or Edit user settings and accesses in metadoc](#)

The screenshot shows the 'User Administration' form. It includes fields for 'Setting of users' (with a dropdown set to 'new'), 'Real Name', 'Email', 'EID Number', 'Hint display', 'Confirmation level', 'Account Disabled', 'Old Password', 'New Password', and 'Confirm New Password'. A 'Validate' button is at the bottom of the form. Below the form is a table with columns 'Group', 'Member', and 'Admin'. The table lists groups: 1_Corporate_Mgmt, 2_BU_Mgmt, 3_Middle_Mgmt, 4_Users, 5_Public, HR, and QA. Red arrows with numbers 0 through 4 point to specific elements: 0 points to the 'Setting of users' dropdown, 1 points to the 'Confirmation level' checkbox, 2 points to the 'New Password' field, 3 points to the 'Member' column checkboxes, and 4 points to the 'Admin' column checkboxes. A 'Validate' button is also present below the table.

Group	Member	Admin
1_Corporate_Mgmt	<input type="checkbox"/>	<input type="checkbox"/>
2_BU_Mgmt	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3_Middle_Mgmt	<input type="checkbox"/>	<input type="checkbox"/>
4_Users	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5_Public	<input checked="" type="checkbox"/>	<input type="checkbox"/>
HR	<input type="checkbox"/>	<input type="checkbox"/>
QA	<input type="checkbox"/>	<input type="checkbox"/>

To "add" or "edit" a user information, simply type in the "0" zone the login of the user and press the "TAB" key. If the user already exists, his information is displayed. If he does not exist, blank field are displayed.

The fields must be simple filled-in or modified as needed.

NOTES:

- If the password zone ("2") is not filled in, the password is left unchanged
- To modify the password, the "old password" field must be left blank.

The group zone ("3") is now writable and allows the administrator to manage the groups access of the user.

Once all information is correct, simply click on one of the two "validate" button ("4" on the figure)

The top of the screen may differ, according to the customization. The standard one is:

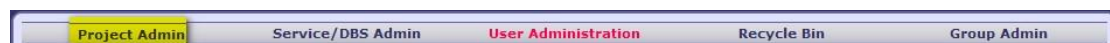


For example, if the "Project" is called "Product" and the "Subproject" is called "Project", "Service" is called "Doc Family", you will see:



9.2.2 Projects / Subprojects Administration

9.2.2.1 Projects administration



This menu is only visible and accessible by administrators. This menu is used to manage the projects (add / remove project/sub-project).

Zone "1" is used to select an existing project (called product in this screenshot)

Zone "2" is used to rename an existing product or to create a new one (by entering a new name).

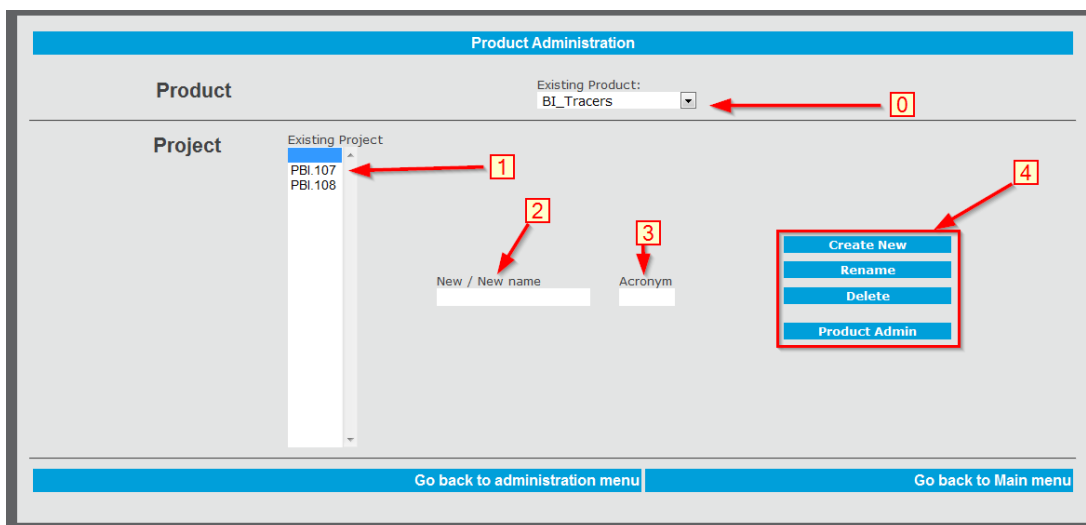
Zone "3" is used to define or rename the acronym. The acronym can be used in the filename construction.

Zone "4" has a list of buttons which have the following effects:

- "Create New (empty)": shall create a project without any sub-project which will have the name specified in zone "2" & "3"
- "Create New (with subproject)": shall create a new project that is a clone of the one selected in zone "1". The name of the new project is given in zone "2" and all the subprojects are automatically created for this project.
- "Rename": simply rename the project selected in zone "1" using as new name, the name specified in zone "2" & "3".
- "Delete": Delete the project selected in zone "1". If this project is already used for documents, it will still exist with the prefix "~~" indicating it is obsolete.
- "Sub-project Admin": switch to the sub-projects administration for the project selected in zone "1".

9.2.2.2 Sub-projects administration

Once a project is selected in zone "1" of the previous figure and you have clicked on the "Sub-projects admin" button, you have to manage the sub-projects:



The principle is identical as before:

Zone "0" is used to select the project (called product in this screenshot) for which you want to manage the sub-projects (called projects in this screenshot).

Zone "1" is used to select an existing Sub-project (called project in this screenshot)

Zone "2" & "3" is used to rename an existing Sub-project or to create a new one (by entering a new name and acronym)

Zone "4" has a list of buttons which have the following effects:

- "Create New": shall create a Sub-project which will have the name given in zone "2"

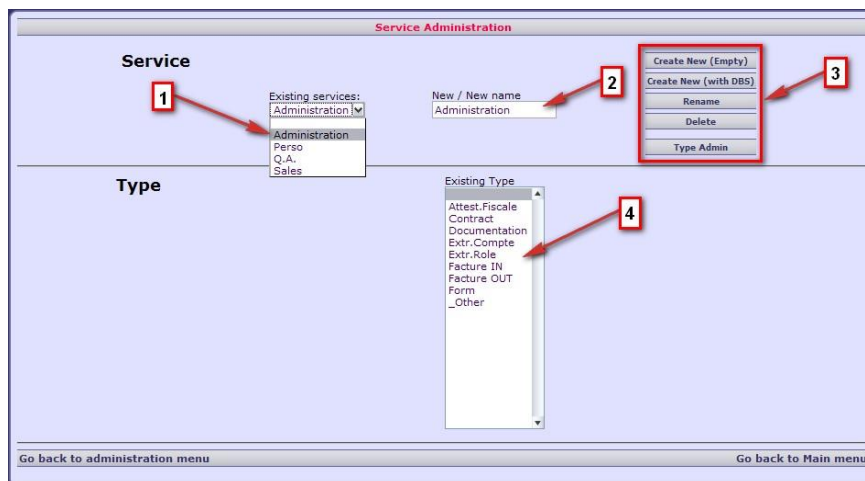
- "Rename": simply rename the Sub-project selected in zone "1" using as new name, the name specified in zone "2".
- "Delete": Delete the Sub-project selected in zone "1". If this project is already used for documents, it will still exist with the prefix "--" indicating it is obsolete.
- "Project Admin": switch back to the projects administration.

9.2.3 Services / Types Administration

9.2.3.1 Services administration



This menu is only visible and accessible by administrators. This menu is used to manage the Services (add / remove Service/Type).



Zone "1" is used to select an existing Service.

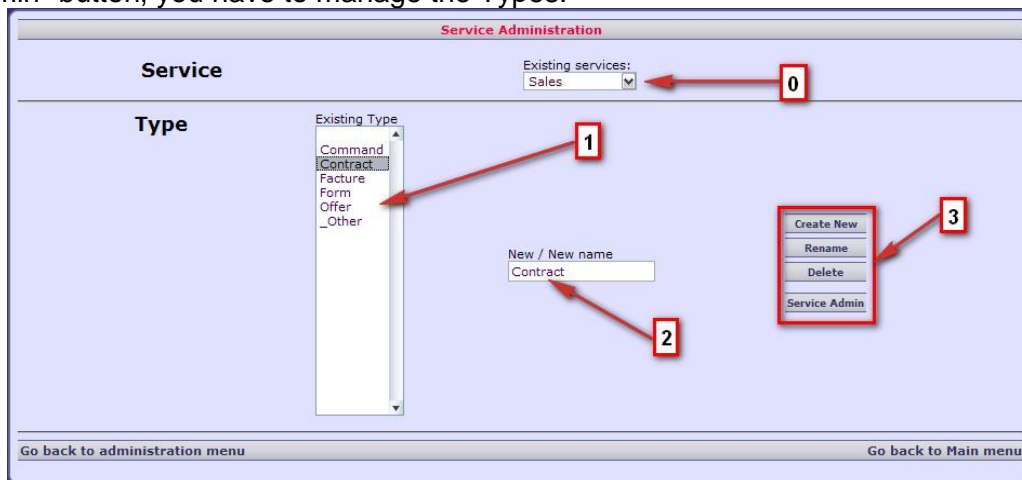
Zone "2" is used to rename an existing service or to create a new one (by entering a new name)

Zone "3" has a list of buttons which have the following effects:

- "Create New (empty)": shall create a Service without any Type which will have the name specified in zone "2"
- "Create New (with Types)": shall create a new Service that is a clone of the one selected in zone "1". The name of the new Service is given in zone "2" and all the Types are automatically created for this Service.
- "Rename": simply rename the Service selected in zone "1" using as new name, the name specified in zone "2".
- "Delete": Delete the Service selected in zone "1". If this Service is already used for documents, it will still exist with the prefix "--" indicating it is obsolete.
- "Type Admin": switch to the Types administration for the Service selected in zone "1".

9.2.3.2 Types administration

Once a Service is selected in zone "1" of the previous figure and you have clicked on the "Types admin" button, you have to manage the Types:



The principle is identical as before:

Zone "0" is used to select the Service for which you want to manage the Types.

Zone "1" is used to select a existing Type.

Zone "2" is used to rename an existing Type or to create a new one (by entering a new name)

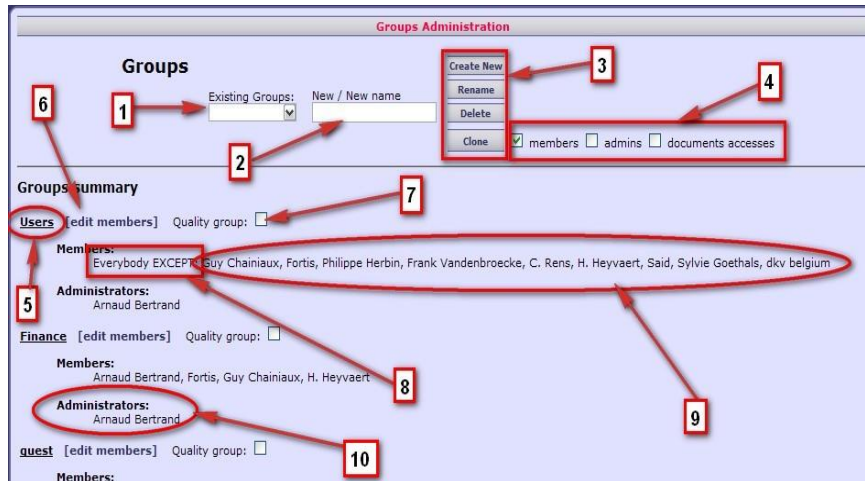
Zone "3" has a list of buttons which have the following effects:

- "Create New": shall create a Type which will have the name given in zone "2"
- "Rename": simply rename the Type selected in zone "1" using as new name, the name specified in zone "2".
- "Delete": Delete the Type selected in zone "1". If this Type is already used for documents, it will still exist with the prefix "~" indicating it is obsolete.
- "Service Admin": switch back to the Services administration.

9.2.4 Groups & members Administration



This menu is only visible and accessible by administrators. This menu is used to manage the Groups (add / remove / rename /clone groups).



Zone "1" is used to select an existing Group.

Zone "2" is used to rename an existing group or to create a new one (by entering a new name)

Zone "3" has a list of buttons which have the following effects:

- "Create New": shall create a group which will have the name given in zone "2"
- "Rename": simply rename the group selected in zone "1" using as new name, the name specified in zone "2".
- "Delete": Delete the group selected in zone "1".
- "Clone": shall create a new group that is a clone of the one selected in zone "1". The name of the new group is given in zone "2". The parts of the original group that are cloned are defined by the option of zone "4" that are:
 - members: if checked, all members of original group will be members of the new one.
 - admins: if checked, all admins of original group will be admins of the new one.
 - documents: if checked, original group rights will be copied for the new one, for each document.

Zone "5" contains the group name

Zone "6" allows admin to edit members of group by clicking on "Edit Members"

Zone "7" : the "quality group" check box, if checked, provides to the group the rights of a quality group, hence all its members inherit of quality officer rights.

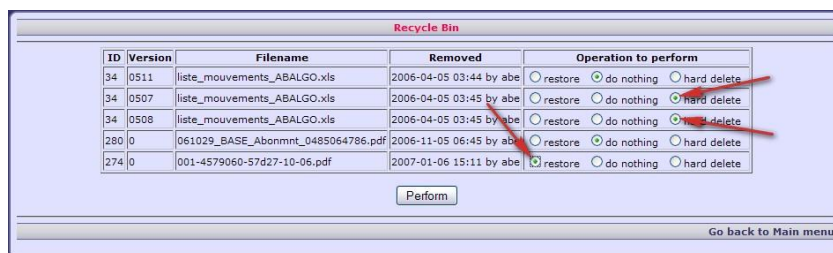
Zone "9" : shows the members of the group. When there too many members in the group, only users that **are not** in the group are displayed, it is indicated by the "Everybody EXECPT" (zone "8")

Zone "10" : shows the administrators of the group.

9.2.5 [Recycle bin](#)

This menu is only visible and accessible by super-administrators. This menu is used to manage the recycle-bin.

When a document is deleted by a user, it is not accessible by users anymore but it is still possible to restore it or to definitely remove it from metadoc (hard-deleted).



All the deleted documents are displayed and by default, "do nothing" is selected.

Super-administrator may then change the action and click on "perform" to execute the operation.

10 FIELDS CUSTOMIZATION

Since version 3.11.1, it is possible to customize all the fields and buttons of metadoc. (It must be done carefully, taken into account the layout of the interfaces. By customizing the field names, the customer is responsible of any interface problem).

- the first index is the language (untill now, only English (0) is supported)
- second index is the field name: It can must be one of the following:

Author, Comment, DateOfEntry, DateOfRelease, Editor, ID, ID_KindOf, ID_Project, Name, OfficialReg, Path, Reference, Responsible, Size, Title, User, ID_Service, ID_Status, ID_Subproject, ID_Trust, InternalRef, Keywords, Labels, MD5, Mime, misc_flags, Version, VersionComment,

MT_AddDoc, MT_Administration, MT_Delete, MT_Metadoc, MT_MetadocVersion, MT_Notification, MT_Rename, MT_UserAdmin, MT_Workflow,

MM_CCLB_IdV, MM_CCLB_Link, MM_CCLB_Ref, MM_Clear, MM_CopyClb, MM_DeriveDoc, MM_DocTree, MM_EditProps, MM_FreezeVersionCl, MM_GetZip, MM_Label, MM_LastDoc, MM_LinkDoc, MM_Listing, MM_NewVersionCO, MM_Search, MM_UplUpdate, MM_ViewEdit,

- Last field are "Displayed" (the name displayed) or "Description" (the content of the bullet).

See the configuration file chapter for an example.

Since version 3.11.1, hints are introduced in metadoc. These hints have a default value but can be customized as explain in previous paragraph. Each user can choose to display these hints or not. It can be change in the 'User Admin' screen.

11 THE CONFIGURATION FILE

The configuration file, allow each sites to tune the metadoc behaviour as he wants. Due to the multiple parameters, here is a sample of configuration file with the different sections:

```

/*****
*
*                                     !!! DO NOT MODIFY THIS FILE !!!
*
*****/

```

```

*          =====
*
* This file provides a default value for the metadoc
* parameters and will be overwritten each upgrade of metadoc
*
* If you want to change some parameters, please,
* define it in the file "dmt_config.php" that will never
* be changed by metadoc
*
*****/

$DocRepository="c:/metadoc/docs";
$SharedReviewDirectoryServer = "c:/tmp";
$SharedReviewDirectoryClient = "c:/tmp";
$DBhost="localhost";
$DBname="metadoc_db";
$DBuser="metadoc";
$DBpass="metapass";
$ZipCmd="/bin/zip";
$TarCmd="/bin/tar";
$MySqlDumpCmd="/mysql/bin/mysqldump.exe";

$LinkCmd="/bin/ln";
$RmCmd="/bin/rm";
$wipe = "/usr/bin/shred -fuz";
$cfg_gpge = "/usr/bin/gpg --cipher-algo AES256 -c";
$cfg_gpgrecipient = "-e --hidden-recipient abalgo";
$cfg_gpgd = "/usr/bin/gpg -d ";

$ShownDocument = 300;
$c_AutoFilterLimit = 200;
$MemorisedDocument = 60;
$FlWarningObsolete = 1;
$FlDownloadAsAttachment=0;
$FlOpenInNewWindow=0;

// cfg_ShowDot is a binary mask
// 1 : show ...v when display simple name
// 2 : show ...v when display filename_max_lengt
// 4 : show ...v when display title
$cfg_ShowDot = 2;

// Default status is possible if needed
//      0: Empty status
//      1: Draft
//      2: Record
//      3: External
$cfg_DefaultStatus = 1; // draft
$cfg_DefaultCategory = 1; //
$cfg_DefaultReference = ""; // in case of new & derive doc
$cfg_DefaultTheme="metadoc4";
$cfg_DefaultSearchWildcardBegin = 0;
$cfg_DefaultSearchWildcardEnd = 1;

// Determine which rule must be applied by default
// It use the RuleMsk, so
// 8: approved
// 4: CI non draft
// 2: CI draft
// 1: With Editor
$cfg_DefaultRuleMsk = 27;
$cfg_ResetRuleMskEachSession = 1;

// Timers
// In case of normal work
$cfg_NormalTimer=2;

// In case of error
$cfg_ErrorTimer=20;

// Error Tracking
$cfg_ErrorLog = "/var/log/metadoc/error.log";
$cfg_ErrLdapTacking=0;

// When the DeriveDoc menu is called,
// The following parameter determines wheter

```

```
// The upload menu is directly called or not
$cfg_DerivedFollowedByUpload=0;

/*****
/* External Link
/* this allows users without metadoc login to access metadoc filesize
/* the link generated will have a maximum validity in terms of
/* Nb open (by default 5 times)
/* time (by defaults 10 days)
*/
$cfg_externallink_maxopen = 5;
$cfg_externallink_maxduration = 240;
*****/

// Parameters for the pro version
/* Naming Example */
function _Naming($doc) {
    global $acro;
    if (function_exists("Naming")) return Naming($doc);
    return "MID" . substr("00000".$doc["InternalRef"],-6) . "v"
.ChSlash($doc["Version"])."_".ChSlash($doc["Name"]);
/*($acro['Service'][$doc['ID_Service']] ? $acro['Service'][$doc['ID_Service']] . "-" :
"") .
    ($acro['Category'][$doc['ID_Category']] ?
$acro['Category'][$doc['ID_Category']] . "-" : "") .
    $doc['InternalRef'] . "-" . $doc['Version'] . "_" .
    $doc['Name'];
*/
}

// cfg_SharedReviewType
// 0 : unsupported
// 1 : Standard in Metadoc
// 2 : On a shared drive
$cfg_SharedReviewType = 1;

// Automatic shared review file creation
// according to the supported type
// default is: not created
$cfg_SharedReviewFileAutoCreated=0;

// field on which behaviour is segregate
// possibilities are
// - ID_Cat
// - ID_Service
$cfg_FilterField = "ID_Cat";

// Workflow behaviour configuration
// Start WF Phase: By default there is no need of QA for this phase
// It can be overwritten globally or by document type
// 0 : default level (or level for the [0])
// 1 : low level - no QA needed
// 2 : high level - QA must start the WF (unless user starting WF is in QA group)
$cfg_WF_StartLevelOfType[0] = 1; // [0]is selected when there is no
$cfg_WF_StartLevel[docType]
$cfg_WF_StartNotifiedUsers[0] = ''; // space separated list of users notified when WF
starts by default
$cfg_WF_StartNotifiedGroups[0] = ''; // space separated list of groups notified when WF
starts by default
// $cfg_WF_StartLevelOfType[1] = 2; // for docType[1], the level is high, QA must start
WF
// $cfg_WF_StartNotifiedUsers[1] = ''; // space separated list of users notified when WF
starts by default
// $cfg_WF_StartNotifiedGroups[1] = ''; // space separated list of groups notified when
WF starts by default
// Note: of course when level 2 is selected, the involved QA are always notified but it
is still possible to add
// other people to be notified

// Ratification Level: By default, approval is suffiscient
// 0 : default level (or low level for the [0])
// 1 : low level - no QA ratification needed
// 2 : high level - QA must ratified the WF (unless user starting WF is in QA group)
$cfg_WF_ApprovalLevelOfType[0] = 1; // [0]is selected when there is no
$cfg_WF_ApprovalLevel[docType]
```

```

$cfg_WF_ApprovalNotifiedUsers[0] = ''; // space separated list of users notified when WF
starts by default
$cfg_WF_ApprovalNotifiedGroups[0] = ''; // space separated list of groups notified when
WF starts by default
$cfg_WF_ApprovalLevelOfType[1] = 2; // for docType[1], the level is high, QA must start
WF
$cfg_WF_ApprovalNotifiedUsers[1] = ''; // space separated list of users notified when WF
starts by default
$cfg_WF_ApprovalNotifiedGroups[1] = ''; // space separated list of groups notified when
WF starts by default
// Note: of course when level 2 is selected, the involved QA are always notified but it
is still possible to add
//      other people to be notified
// Because it is now possible to have WF without QA, it is still possible to add
users/groups
// having the same rights as QA for the different type of documents
$cfg_WF_PermanentQAUsers[0] = '';
$cfg_WF_PermanentQAGroups[0] = '';
$cfg_WF_PermanentQAUsers[1] = '';
$cfg_WF_PermanentQAGroups[1] = '';

// Person to be notified in case of apparition (new version or add doc) of
// a certain category
$cfg_CategoryNotifiedUsers[0] = '';
$cfg_CategoryNotifiedGroups[0] = '';
$cfg_CategoryNotifiedUsers[1] = '';
$cfg_CategoryNotifiedGroups[1] = '';

// When a workflow is started with only one approver which is the owner,
// Users can be notified (usually quality group)
$cfg_WF_OwnerApproverNotifiedUsers[0] = ''; // space separated list of users notified
when WF starts by default
$cfg_WF_OwnerApproverNotifiedGroups[0]= ''; // space separated list of groups notified
when WF starts by default

// The QA column can be hidden when MinimumQO is 0
$cfg_WFHideQO=1;

// determine if approved can be disabled in the
// selection rule
// 0 : Can be unchecked
// 1 : Can be unchecked with warning
// 2 : Can be unchecked for amount of time $cfg_RuleApprovedTimer seconds
// 3 : can not be unchecked except by QA
// 4 : can not be unchecked
$cfg_RuleUncheckApproveLevel = 0;
$cfg_RuleApprovedTimer=60;

// Mail configuration for metadoc
$UseWFEmailNotif = 1;
$cfg_SendMailWhenWFStatusChanged=0;

// Set the properties in RO when CI
// When checked-in, properties are still editable for
// mask 0x1 : normal user
// mask 0x2 : QO member
// mask 0x4 : Admin
// mask 0x8 : Super Admin
$MskPropsRWWhenCI=0xe; // (std properties) are editable by QO admin and superAdmin
$MskKwdsRWWhenCI=0xf; // Keywords are editable by everybody
$MskEditorRWWhenCI=0x8; // Editor is only editable by superadmin

// Authentication parameter
$FlPhpAuthOnly = 0; // Set to 1 if apache authentication not used
$MetadocInstanceName = "Metadoc PRO";
$AdminAuthTimeout=300;
$cfg_AuthMetadocLocal = 1; // Set to 1 if MetadocLocal Login Passwd is allowed
$cfg_AuthLdap = 0; // Set to 1 if LDAP authentication is allowed
$cfg_DisableLocalWhenLdapUsed = 0; // when 1, if ldap login has been used, MetadocLocal
is disabled.

// LDAP server
$cfg_LdapServer[0] = "";
$cfg_LdapAdmin[0] = "";
$cfg_LdapAdmPasswd[0] = "";
$cfg_LdapDC[0] = "";

```

```

// This is the NTLM network from which users can use single sign on
// When this variable is not defined, single sign on is not allowed
$Trusted_NTLM = "";

// Full text index
$cfg_FullTextIndex = 0;

// -----
// Digital signature parameters
//
$MinSignatureLevel=2; // default is X509 certificate
$MaxSignatureLevel=2; // default is X509 certificate
// signature levels are:
// 0: simple confirmation
// 1: mail only
// 2: mail with X509 certificate

$MultiIdAllowed = 0; // In case of identity mismatch, when it is
// 0: you get an error
// 1: you get only a warning
// 2: it is accepted without warning

// Next parameter has sense for PRO version only
// By default, WF signature are not considered as signature in the result screen
// and in the signature report
// It is however possible to include those signed with X509 in the list by setting
// This parameter to 1
$IncludeX509WFAsSignature = 0;

$PreviousSignaturesIncluded = 1; // By default, any signature comments
// includes all the previous one
// (those already signed only)

$SignStatusModifiableBy = 8 | 2; // 1 : Any users
// 2 : Quality officers
// 4 : Admins
// 8 : Super admin

$SignStatusSetable = array(1, // Informal
2, // Work in progress
3, // Draft
5, // Reviewed
8, // Approved
9 // Repudiated
);
$SignStatusUnsetable = array(1, // Informal
2, // Work in progress
3, // Draft
5, // Reviewed
8, // Approved
9, // Repudiated
20 // WFCancel
);

// Confirmation level min/max
// 0: simple confirmation
// 1: mail only
// 2: mail with certificate
$MinConfirmationLevel = 0;
$MaxConfirmationLevel = 2;
// Since v3.10.6, it is possible to define
// A Role min/max confirmation level
// The priority order is Role (biggest priority), global, user
// The Role are: "Reviewer", "Integrator", "Approver", "QO"
$MaxConfLevelOfRole["Reviewer"]=2;
$MinConfLevelOfRole["Integrator"]=1;
$MinConfLevelOfRole["Approver"]=2;
$MinConfLevelOfRole["QO"]=2;

// The certificat table is a list of certificats of Certifier Authority
// The syntax is the following: array of certificats full path
$CertifTable = array("C:/Program Files/cvsnt/ca.pem",
"C:/metadoc/cert/thawte_freemail.cer",
"C:/metadoc/cert/citizen.cer",
"C:/metadoc/cert/belgiumroot.cer");
$MetadocEmail = "metadoc@yourmailserver.com";
$MetadocServer = "http://localhost";

```

```

$MetadocRoot      = "http://localhost/metadoc";

$MailServerProtocol="143/imap";
// $MailServerProtocol="993/imap/ssl";
// $MailServerProtocol="993/imap/ssl/novalidate-cert";
// $MailServerProtocol="110/pop3";
// $MailServerProtocol="995/pop3/ssl";
// $MailServerProtocol="995/pop3/ssl/novalidate-cert";
// add /notls if tls not supported

$UseCompileComments=1;
$MailFileLastAttempt = "c:/metadoc/docs/semapop3";
$MailServer = "mail.abalgo.com";
$MailUser="metadoc@yourmailserver.com";
$MailPassword="pop3password";

$ReviewDelay      = 14; // number of days by default for the review
$ApprovalDelay    = 7; // number of days by default for approval after the review
$StartReminder    = 3; // this parameter specifies the number of days before the target
                    // when a reminder must be sent
$StopReminder     = 15; // this parameter specifies the number of days after the target
                    // during which a reminder continues to be sent

$MinimumReviewer  = 2; // minimum number of reviewers in the official review process
$MinimumApprover  = 1; // minimum number of approver in the formal approval process
$MinimumQO        = 1; // minimum number of quality officer in the formal approval process
$ApprovedVersionRegex = "^ *[A-Z] *$";
$IntermediateVersionRegex = "^ *[A-Z]{0,1}[0-9] *$";
$DefaultNewVersion="0";
function NextVersion($tmpmaxv) {
    global $DefaultNewVersion;
    if ($tmpmaxv == "") return $DefaultNewVersion;
    if (preg_match("/(.*)([A-Za-z])([_pdf]|(pdf))$/", $tmpmaxv, $matches)) return
$matches[1] . $matches[2] . $DefaultNewVersion . $matches[3];
    if (preg_match("/(.*)([A-Za-z])([_pdf]|(pdf))$/", $tmpmaxv, $matches)) return $matches[1]
. (++$matches[2]) . $matches[3];
    if (preg_match("/(.*)([A-Za-z])(_CandWF.*)$/", $tmpmaxv, $matches)) return $matches[1]
. $matches[2] . $DefaultNewVersion;
    if (preg_match("/(.*)([A-Za-z])$/", $tmpmaxv, $matches)) return $matches[1] .
$matches[2] . $DefaultNewVersion;
    if (preg_match("/(.*)([A-Za-z])(_CandWF.*)$/", $tmpmaxv, $matches)) return $matches[1] .
(++$matches[2]);
    return $DefaultNewVersion;
}
function NewTargetVersion($tmpmaxv) {
    global $DefaultNewVersion;
    if ($tmpmaxv == "") return $DefaultNewVersion;
    if (preg_match("/(.*)([A-Za-z])([_pdf]|(pdf))$/", $tmpmaxv, $matches)) return
$matches[1] . (++$matches[2]);
    if (preg_match("/(.*)([A-Za-z])([_pdf]|(pdf))$/", $tmpmaxv, $matches)) return "A";
    if (preg_match("/(.*)([A-Za-z])(_CandWF.*)$/", $tmpmaxv, $matches)) return $matches[1]
. (++$matches[2]);
    if (preg_match("/(.*)([A-Za-z])$/", $tmpmaxv, $matches)) return $matches[1] .
(++$matches[2]);
    if (preg_match("/(.*)([A-Za-z])(_CandWF.*)$/", $tmpmaxv, $matches)) return
$matches[1] . (++$matches[2]);
    return "A";
}

// Autosearch options
$cfg_Autosearch= array(
    "Allowed"      => 1,
    "TimerChange1" => 150,
    "TimerChange2" => 3000,
    "TimerStable"  => 150
);

// Debug option
$dbgCertificat = 0;
$dbgMail = 0;
$dbgIntegrity = 0;

// Max size configuration
$title_max_length = 80;
$filename_max_length = 40;

$cf_solr = 8982;
// Determine which version must be indexed

```

```

// It use the RuleMsk, so
// 8: approved
// 4: CI non draft
// 2: CI draft
// 1: With Editor
$cf_solr_RuleMsk=(1<<10); // default is Approved / LatestCI
$cfg_solrhost="http://localhost:8982";

$cfg_trfield_v=array('i_Name' => 'fln',
                    'i_Reference' => 'ref',
                    'i_Labels' => 'lbl',
                    'i_Title' => 'tit',
                    'i_Author' => 'aut',
                    'i_Any' => 'text',
                    'i_Keywords' => 'kwd',
                    'i_Comment' => 'com');

$cfg_trfield_t=array('i_ID_Service' => 'srv',
                    'i_ID_KindOf' => 'kof',
                    'i_ID_Project' => 'pro',
                    'i_ID_Subproject' => 'spr');

$cfg_fields_CI1=array(
    "Author",
    "ID_Service",
    "ID_Project",
    "ID_Subproject",
    "Reference",
    "InternalRef",
    "ID_KindOf",
    "DateOfEntry",
    "DateOfRelease",
    "Title",
    "Comment",
    "Path",
    "Version",
    "VersionComment",
    "Responsible",
    "ID_Cat",
    "ID_Status"
);
$cfg_fields_CI1Common=array(
    "Author",
    "ID_Service",
    "ID_Project",
    "ID_Subproject",
    "Reference",
    "ID_KindOf",
    "Title",
    "Comment",
    "Responsible",
    "ID_Cat"
);
$cfg_fields_CI2=array(
    "Keywords"
);
$cfg_fields_CI3=array(
    "Editor"
);
$cfg_Remote="REMOTE_ADDR";
$cfg_AuditAllowViewDetails=1;

$cfg_EncEnable=0;
$cfg_EncDebug=0;
$cfg_EncLocal="test";
$cfg_EncServer=array("194.135.84.59");
$cfg_EncPort=array(5555);

```

12 GLOBAL RECOMMENDATIONS

- Each user must create its own “metadoc-workspace” directory.
- Original files uploaded into the system must be renamed with the prefix __metadoc__

- Filename in DB CAN'T contain version or reference numbers.
- Filename in DB shouldn't contain special characters (such as accent, parenthesis, ...)
- Each upload should be followed by controlling if the properties are still up to date
- A file used by somebody else should be checked-in
- For back-up reasons, the file in the metadoc-workspace must be frequently uploaded
- A document must be frozen if there is no reason to work on it anymore.
- Once it is uploaded, a document must be moved from the metadoc workspace to the trash or must be renamed to indicate this document is in metadoc.