User Guide

Kronodoc 3.0

Intelligent methods for process improvement and project execution

© 2003 Kronodoc Oy
# Table of Contents

1  User Guide .......................................................... 5
2  Information Structure in Kronodoc ......................... 6
3  Entering and Exiting Kronodoc ............................... 7
   3.1  Logging On to an Installation ......................... 7
   3.2  Listing Projects .......................................... 7
   3.3  Exiting Kronodoc ......................................... 8
4  User Interface and Navigation ............................... 9
   4.1  Navigating Through Folder Structure ................ 9
   4.2  Document List ........................................... 11
   4.3  Searching for Documents or Files .................... 11
   4.4  Viewing Documents ...................................... 12
5  Document List .................................................. 13
   5.1  Default Document List .................................. 13
   5.2  Custom Document List ................................... 14
6  Searches and Filters ........................................... 15
   6.1  Keyword Searches .......................................... 15
   6.2  Advanced Searches ........................................ 15
   6.3  Stored Searches .......................................... 16
   6.4  Document List Filters .................................... 16
7  Folder Properties and Operations .......................... 17
   7.1  Viewing Folder Properties .............................. 17
   7.2  Folder Property Fields .................................. 18
   7.3  Folder Operation Links ................................... 19
   7.4  Creating Subfolders ...................................... 20
   7.5  Deleting Folders .......................................... 20
8  Document Properties and Operations ........................ 21
   8.1  Viewing Document Properties .......................... 21
   8.2  Document Property Fields ............................... 22
   8.3  Document Operation Links ............................... 23
   8.4  Creating Documents ...................................... 24
   8.5  Creating Subdocuments ................................... 24
   8.6  Document Tools in the Document List ................ 24
   8.7  Document Locking ........................................ 25
   8.8  Versioning Documents .................................... 25

Kronodoc 3.0 User Guide © 2003 Kronodoc Oy
Files and URLs
9.1 Viewing Files
9.2 Adding Files to Documents
9.3 Replacing Files or Upload to New Version
9.4 Deleting Files and URLs
9.5 Checkout / Check-in Files
9.6 Simple Text Files
9.7 Office Integration - Send to Kronodoc

Statuses and Lifecycles
10.1 Changing Statuses
10.2 Frozen Status

Copying and Linking Through Clipboard
11.1 Copying or Adding to Clipboard
11.2 Pasting from Clipboard
11.3 Linking and Unlinking
11.3.1 Linking to Documents
11.3.2 Linking to Folders
11.3.3 Linking to Recent Items
11.3.4 Removing Links
11.4 Clearing Clipboard
11.5 Exporting Clipboard Items

Access Rights
12.1 Access Control Profiles
12.2 Filling Access Control Matrix - Custom Access Profiles
12.3 Role Based Access - Project Level
12.4 Role Based Access - Document Level
12.5 User Types
12.6 Forced Access Profiles

Collaboration
13.1 Commenting
13.1.1 Viewing Comments
13.1.2 Adding Comments
13.1.3 Adding Subcomments
13.1.4 Adding Part Comments
13.2 Circulation
13.2.1 Sending Current Document or Folder
13.2.2 Sending Several Documents or Folders Through Clipboard
13.3 What's New Reports
13.3.1 Viewing What's New Online
13.3.2 What's New Contents
13.3.3 What's New Icons
13.3.4 Subscribing to What's New
13.4 Notifications
13.4.1 Notification Triggers
13.4.2 Subscriber Notifications
13.4.3 Push Notifications

14 My Recent Items
14.1 Recently Accessed Items
14.2 My Checked Out Files

15 Dashboard
15.1 Project Dashboard
15.1.1 Usage Statistics
15.1.2 Work Status
15.1.3 Work Progress
15.2 Advanced Dashboard
15.2.1 Throughput Time
15.2.2 Communication

16 Settings
16.1 Changing Name, Email, Password
16.2 Configuring Notification Preferences
16.3 User Interface Settings
16.3.1 Colors
16.3.2 Open Files and Links in New Window
16.3.3 Language and Time Zone Settings
16.3.4 Template Set
16.3.5 Setting Default Document Filters
16.3.6 Saving UI Settings and Reverting to Default
16.4 Time Format Settings

17 Other Topics
17.1 System Requirements
17.2 Sorting
17.3 Kronodoc Specific Icons and Buttons
1 User Guide

This guide is developed to assist Kronodoc users to help them accomplish everyday tasks. Project configuration and administration topics are covered by the Kronodoc Configuration Guide.
2 Information Structure in Kronodoc

In Kronodoc, information is stored on four levels - Projects, Folders, Documents and Files.

**Projects**
A project is the top level information container. Each project is predefined to serve different needs, therefore folder structures, document properties and access rights in each project are different.

**Folders**
Folders are used to organize information inside a project. They may contain other folders and documents. Folders can have different properties, e.g. types (for example Projects, Parts) or statuses (In Work, Released).

**Documents**
Documents reside inside folders. Depending on their purpose, documents can be of different type (for example Contract, Proposal, Claim, Task, Calendar item, Event, Report), always in a certain status (In Work, Released) or have defined relevance (Private, Public). Documents always contain general properties, such as "author", "document number", "creation date", etc. and can also include customizable properties, such as "contract value", "due date". Additionally, documents may contain files and links to other documents or web resources.

**Files**
Files are attached to documents. Several files can be added to a document - of any type and virtually any size. The document properties apply to all files included in the document. The only way to give two different sets of properties (for example access rights) to two different files is to put them in two different documents.
# Entering and Exiting Kronodoc

In order to view Kronodoc folders, documents and files, you have to access Kronodoc installation through a web browser. Most of the popular web browsers can be used. For the list of supported browsers check [System Requirements](#).

## 3.1 Logging On to an Installation

First, open a web browser. In the address field enter the path to a Kronodoc installation (e.g. `http://demo.kronodoc.fi`). The path starts with `https://` (if a secure connection is used) or `http://` if not. In case you don't know the exact path, please contact your system administrator.

Once the path is entered, a Kronodoc login screen is displayed. Enter your username and password, and click "Login" or the "OK" button.

![Login Screen](image)

If you are authorized to enter the installation, the project list is displayed. If you are not authorized or username/password is mistyped - an error message appears. Note, that Kronodoc usernames and passwords are case sensitive. For example, if the given username is 'anny', then neither 'Anny' nor 'ANNY' is valid.

## 3.2 Listing Projects

The "Project list" contains all accessible Kronodoc projects and basic information about each project, like name, status and code. Projects can be sorted by clicking on the header (1). A "Project icon" appears in the project list left to the project name. Click on the project icon to visit the web site (home) of the project (2).
To enter a project and view its contents, click the project name (3). To learn more about project, you view its properties (4). Recently accessed folders, documents and files are listed on the right side of the project list (5).

3.3 Exiting Kronodoc

It is recommended to close the web browser window, when finished using Kronodoc. In some installations, a "Logout" link is available. The link appears on the top right corner of the browser window. You can safely exit Kronodoc by clicking the link.
4 User Interface and Navigation

1- Top frame - contains links to Project list, My recent items and online help. Document list, Settings, What's new and Dashboard are different views in a Kronodoc project. The Document list view is the most common and is used for viewing and creating information in Kronodoc. The Settings view is used to define user interface and project configuration settings. The What's new view shows recent changes in the project. The Dashboard view shows analyses on project activity and performance.

2 - Tree browser is used for navigating through the folder structures. Click on a folder to view its contents in the right frame.

3 - Folder summary and searches are located on top of the document list. The folder summary contains folder status color, type and name. Searches provided on the document list are: Simple search, Stored searches and Advanced search.

4 - Tools and Filters tabs on the Document list. By clicking on the "Tools" tab, the document tools and clipboard are enabled. Through the "Filters" you can define, which documents should be shown on the document list.

5 - Documents and files are listed in the document list. To view document properties or a file click the name link.

6 - Footer contains information about the currently logged in user, its group membership and page creation details.

4.1 Navigating Through Folder Structure

Folders are organized in a hierarchical structure also called the "tree structure". The structure consists of a root folder and subfolders. Project can have several root folders (structures).

Changing tree navigation modes

The structure can be navigated through the "tree browser", which supports two navigation modes: Java or HTML. Choose the navigation mode by clicking the "Java navigator" or "HTML navigator" link.
Selecting a folder

To select a folder, click its name or icon. The selected folder has a highlighted name and an open folder icon (see "Subfolder with documents" in picture above). Once a folder is selected, its contents are listed in the "Document list" frame (right side of the screen).

Changing the root folder

Use the drop down list to select another root folder. Click the "GO" button, if the root folder is not changed automatically.

Viewing as a root

Click the "View as root" link to temporarily view the selected folder as a root folder.

Tree browser icons

A folder icon tells about its contents and status.

- Empty folder.
- Folder contains documents.
- Folder is empty, but subfolders contain documents
- Folder is frozen - it cannot be modified

Other icons in the tree browser let you to expand, collapse and reset folder structures, and enter the notification inbox.

- Expand the folder's sub tree.
- Collapse a sub tree.
- Notification inbox. Contains notifications from the project, if you have subscribed them to be sent here. To see contents or change notification preferences, click the icon.
- An open notification inbox.
- "GO" button. Click this to reset the current tree structure and to display it from the root.
4.2 Document List

The "Document list" is one of the basic Kronodoc views, used to navigate through the contents: list, search and filter documents and files. (See picture) You can always select this view from the top frame of the browser window. A document list consists of three parts: Folder summary, Document tools and filters and List of documents.

Folder summary

The folder summary starts with the folder status (see picture below), folder type (Work package) and name (WP Structure). Clicking folder name opens its properties. Click "List contents" to show document list of the folder. The folder summary also includes description.

Document tools and filters

The tabs let you view a simple document list or one with tools or filters. Choose the "Tools" tab to display tools (to create and remove documents) and clipboard (copy, paste, link, and send documents and folders). The "Filters" tab provides options for narrowing down the document list to view documents of certain version, status, type and relevance. You can also view documents of many folders by changing the scope.

List of documents

The document list shows contents of the current folder (unless a scoping filter or search is applied). You can choose between two listing modes - "Default" and "Custom". The "Default" mode lists the documents and attached files / URLs. A few document property fields are showed as well: number, name, version, status and modification date.

<table>
<thead>
<tr>
<th>List: Default - Custom</th>
<th>1 - 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>Name</td>
</tr>
<tr>
<td>000002</td>
<td>Document with two text files v1</td>
</tr>
<tr>
<td>About Kronodoc.txt</td>
<td>checkout</td>
</tr>
<tr>
<td>Four Steps.txt</td>
<td>checkout</td>
</tr>
</tbody>
</table>

The "Custom" mode provides possibility to freely choose which document property fields to view in the document list (see Custom Document List).

4.3 Searching for Documents or Files

Kronodoc provides two types of document searches: the "Keyword search" and the "Advanced search".

The Keyword search is available in the document list (see picture below). To search for a document, enter a keyword (for example document number) and press enter. The document list is automatically scoped to "all folders", so results will come from the whole project (see Keyword Searches).

The Advanced search lets you specify which document (or parent folder) properties have to match, in order to find a document. Advanced search settings can also be stored and reused (see Advanced Searches, Stored Searches).
4.4 Viewing Documents

Once navigated to a document, view the document properties by clicking its name.

Document summary

The document properties page starts with the document summary. It displays document status (yellow color, see the picture below), type (Other), name (Document with two text files), version (v:1) and number (000002).

Other: **Document with two text files** v:1 (000002)

Property tabs

Under the document summary you see the property tabs. By selecting a tab, different set of properties is shown. For example, if you want to see files, which are attached to the document, click "Files/Links" tab. Tab "All" list all properties on one page.

5 Document List

The Document list view shows contents of the current folder or the results of searches and filters in the current project. You can always switch to the Document list view, by clicking the "Document list" link in the top frame (1 in the picture below).

A Document list starts with the current folder summary (2) and document searches (3). Besides folder status, type and name, the folder summary might also include its description (4). It is followed by tools selection tabs, which let you enable the document tools and clipboard or the document filters (5).

If no searches or filters have been set, the document list shows only documents, which are located in the current folder. The document count in the document list (6) shows how many documents are listed. If the number of the documents is higher than 10, the document list is automatically shown in paged view (10 document per page).

Documents along with files are listed in the document list (7). To view document properties, click on its name.

The document list ends with a page footer, which contains information about currently logged in user and page creation details.

5.1 Default Document List

The "Default" document list shows general document property fields: number, name, status, modification time and files / URLs attached to each document. To view other document fields, switch to the "Custom" document list.
5.2 Custom Document List

The Custom list allows you to choose the general and custom property fields to be shown in the document list. View Custom list by clicking "Custom" link (available above listed documents).

Modifying the Custom list contents

To modify the Custom list contents, click the "Show field selection" link and select the required fields. Click "Update" button when finished. To hide the settings view, click the "Hide field selection" link.

Exporting

You can also export the contents of the Custom list to use in a spreadsheet application (e.g. MS Excel). To export, click the "Export" link. Kronodoc will generate a CSV (comma separated values) file. Note, that the CSV file contains only documents that are visible in the current document list page (e.g. 10 documents). If you want to include all of the documents, click the "List all" link prior to exporting.
6 Searches and Filters

Documents can be searched and filtered in the document list.

6.1 Keyword Searches

Keyword search is available in the top right corner of the document list. To find the documents that contain specified keywords, enter the keywords in the search field and press ENTER.

A keyword is a text string that is used in document name, number, description or inside files attached to the documents (TXT, DOC, PDF). Search is done across all folders in the project and results displayed in the current document list.

6.2 Advanced Searches

The advanced search lets users find documents, which match exact criteria. To run the advanced search, click the link, which is available in the top right corner of the document list. The advanced search dialog is then displayed.

**Defining the search**

In the advanced search dialog, you can specify the search criteria based on parent folder and document properties.

- "Properties" selections - filters the documents according to specified folder or document properties
- "Property" fields - select the property that you want to use as a basis for the search. Select the comparison method and enter the search value in the text field
- "Keywords" - enter the string used in the document name, number, comment or file linked to the document
- "Search scope" - defines whether the search will be performed in the current folder or across several folders
- "Sorting order" - defines the sorting order of the results

**Performing the search**

Search is performed when you press the "Search" button. The matching documents are displayed in the first browser window, which currently shows Kronodoc document list. 
Once you have specified a search and intend to reuse it later, you can store it.

### 6.3 Stored Searches

Advanced search can be reused by storing it. First, define an advanced search.

**Storing the search**

In the "Advanced search" dialog, click the "Store" button.

- "Name" - intended name for the search, which will be used in the document list
- "Don't save folder scope" - select this option if you are saving the search which has "Search scope" set to "Current folder", and you would like to reuse the search also for other folders. If you leave this option empty, the search will always be performed in the current folder.
- "Make available for all users" - if the option is selected, the search will become available for all users in the projects. The selection can be made by project privileged users only.

<table>
<thead>
<tr>
<th>Store search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Don't save folder scope</td>
</tr>
<tr>
<td>Make available to all users</td>
</tr>
</tbody>
</table>

**Applying a stored search**

Enter the document list and select a stored search from the drop down menu to the left of the search box. The stored search is applied immediately when selected.

**Note:** Stored searches can not be edited. If you want to change stored search settings - delete the search and create a new one.

**Deleting stored searches**

Navigate to the stored searches folder. It is available as a separate root folder. Follow these steps:

- Select root folder "8000-Searches" in the tree browser.
- View the folder properties: click folder name in the document list.
- Navigate to the folder, which name matches the stored search. **Before deleting, verify that you have selected the correct folder!!!** And click the "Delete" link, which is available in the "General" properties page.

### 6.4 Document List Filters

To filter the current document list, select the "Filters" tab and select the required filtering options. Click the "Filter" button to filter the list.

By default document list filtered according to the User interface settings (see [Setting Default Document Filters](#)).
7 Folder Properties and Operations

The project structure in Kronodoc consists of folders and links between them. The system stores information, properties, about folders. Each folder can contain documents and subfolders. When you activate a folder by clicking its folder icon in the left frame, the folder contents are displayed in the right frame.

The default content in the right frame is a document list that includes all documents attached to the active folder. The controls for searching information and manipulating documents are located on top of the document list.

7.1 Viewing Folder Properties

The current folder properties page is displayed once you click the name link which is available on top of the document list. To return to the document list, click the “List contents” link the in the folder properties page.

The folder properties page consist of (1) folder summary and (2) four properties tabs: “General”, “Links”, “Collaboration” and “All”. The folder properties fields are grouped in sections under these tabs. To view all folder properties as one long page, select the “All” tab.

1. Folder: Subfolder with documents  •  List contents
2. 
   General  Links  Collaboration  All

General properties

General: Name, User code, Letter code, Version, Type, Description, Creator, Creation date, Modifier, Modification date, Node position
Custom property fields, which depend on the folder type and project settings
Lifecycle: Status, Lifecycle

Links properties

Links: Parent folders, Subfolders

Collaboration

Comments: Number of comments attached to the folder
Notifications: Subscriber notifications, Notifications (push)
Access control: Access profile or custom access definition
7.2 Folder Property Fields

**Name** - The name of a folder is used to identify it in the project structure. It is shown to the user in the tree navigator in the left frame and on top of the document list (right) frame when the folder is active. The name can only contain plain text, not any links, images, or other HTML tags.

**User code and Letter code** - Kronodoc supports two separate user-defined codes for each folder. Typically, the user code is numeric and the letter code is an acronym or a mnemonic of the subproject. Both codes are optional.

**Version** - Kronodoc records folder versions for compatibility when the system is connected to an engineering database or a product data management system. Kronodoc does not itself provide the functionality for versioning folders.

**Position** - All folders have an internal ordinal number that specifies the order in which they appear in the tree browser. This number will be incremented automatically in all of the following folders if you add a new folder between two existing folders.

**Created and Modified** - Kronodoc records the user names of the creator and the last modifier of a folder and the corresponding dates and times in its properties. The creator is considered to be the owner of a folder. The full name and email link are read from the user configuration file.

**Lifecycle** - Kronodoc supports lifecycle management of folders and documents. The folder lifecycle defines the transitions a folder can go from one status to another and the group of users who are allowed to trigger each transition.

**Status and Type** - Each folder is characterized by two properties in Kronodoc. The folder status describes a folder relative to the lifecycle of the folder and the folder type identifies different kinds of subprojects. In the document list, folder status is visible as a colored bar in the folder summary section. The folder type is shown before folder name.

**Description** - The folder description can contain an introduction to the scope and contents of a folder. It is usually displayed in the beginning of its document list. The text can be formatted using any valid HTML tags to produce, for example, lists and images.

**Subscriber notification** - Registered users of a Kronodoc project can subscribe to notification emails about changes to a given folder. The list of changes that will trigger a notification email can be set in the project configuration.

**Parent folders** - A list of all parent folders the active folder has been linked to.

**Subfolders** - A list all subfolders of the active folder.

**Access control** - Access control rights can be defined through different access rights profiles. The access control heading indicates the currently active access profile.
7.3 Folder Operation Links

The folder properties page contains operation links, which let users perform certain actions to and in the folder. The following list contains standard Kronodoc operations. Visibility of the operations depends on the access rights that the user possesses in the folder.

Operations in the "General" section ("General" and "All" tabs)

- **Edit** - Opens the folder in an edit view.
- **Delete** - Deletes the folder properties and its contents (document and subfolders). The documents and subfolders linked to several folders are not deleted.
- **Send** - Send the folder to other Kronodoc users or groups through email.
- **Create subfolder** - Create a subfolder to the current folder.
- **Import subfolders** - Import a CSV (comma separated values) file, which contains folder structure definition. See "Configuration guide" for description.
- **Export subfolders** - Export a CSV file with folder and subfolder definitions. See "Configuration guide" for description.
- **Importer** - Import a structure or TAR archive file, which has been created using "Exporter" functionality. See "Configuration guide" for description.
- **Exporter** - Export current folder, subfolders and documents, based on user defined settings. See "Configuration guide" for description.
- **Zip import** - Import a ZIP archive of files and desktop folders, for automated creation of Kronodoc folders and documents.

Operations in the "Lifecycle" section ("General" and "All" tabs)

- **Change status** - Opens the status change dialog of the folder.

Operations in the "Links" section ("Links" and "All" tabs)

- **Remove links** - Opens the folder unlinking dialog.
- **Link folder** - Opens the dialog for linking the current folder to recently visited folders in the project.
- Clipboard: **Copy** - Clear the clipboard and add the current document to its contents.
- Clipboard: **Add** - Add the current document to the clipboard without clearing its contents.
- Clipboard: **Link** - Link the clipboard contents into the current folder.
- Clipboard: **View** - View the clipboard contents.

Operations in the "Comments" section ("Collaboration" and "All" tabs)

- **Add** - Add a new comment to the folder.
- **View** - View the comments attached to the folder.

Operations in the "Notifications" section ("Collaboration" and "All" tabs)

- **Send** - Send the folder to other Kronodoc users or groups through email.
- **Subscribe** - Click to subscribe to the folder notifications.
- **Unsubscribe** - Available when you have subscribed to the folder notifications. Click to unsubscribe.
7.4 Creating Subfolders

To create a subfolder, enter the (parent) folder properties page (click the folder name in the document list). Select the "General" tab and click the "Create subfolder" link. A new folder properties page is displayed. Fill the properties and save. After saving the parent folder properties page is displayed. To visit the newly created subfolder select it in the tree browser or parent folder properties page, the "Links" sections.

7.5 Deleting Folders

Deleting a folder implies permanent and immediate removal from the system. Its subfolders and documents will be deleted as well, unless they are linked to other folders.

To delete, enter the folder properties page and click the "Delete" link, in the "General" section. The link is available only if you have necessary rights to delete the folder.
8 Document Properties and Operations

Kronodoc maintains properties about each document. Part of this information, e.g. the creation and last modification time, is automatically generated and updated by the system, while others, for example the title, author, description and access rights are filled out by the user.

In the document properties pages you can also see operation links, which are used for performing certain actions with the document.

8.1 Viewing Document Properties

In the document list click the document name to view its properties.

The document properties page consists of (1) the document summary and (2) four tabs: General, Files/links, Collaboration and All. The document properties fields are grouped in sections under these tabs. To view all document properties as one long page, select the "All" tab.

General properties

General: Document Name, Number, Version, Relevance, Type, Description, Author, Author email, Creator, Creation date, Modifier, Modification date
Custom property fields, which depend on the document type and project settings
Lifecycle: Status and Lifecycle

Files/links properties

Files and URLs: A list of files and web links attached to the document. Actions related to them.
Links: Folders, in which the document is linked in as well as parent and subdocuments

Collaboration

Comments: Number of comments attached to the document
Notifications: Subscriber notifications, Notifications (push)
Access control: Access profile or custom access definition
Role accesses: Available if the project has defined roles. Use this section to add role accesses to the document for individual users or user groups.
### 8.2 Document Property Fields

**General**

<table>
<thead>
<tr>
<th>Name:</th>
<th>Kronodoc Support</th>
<th>Author:</th>
<th>Kronodoc Support</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number:</td>
<td>000019</td>
<td>Email:</td>
<td><a href="mailto:Support@kronodoc.com">Support@kronodoc.com</a></td>
</tr>
<tr>
<td>Version:</td>
<td>1 Version history</td>
<td>Created:</td>
<td>28.08.2000, 15:15 by Kronodoc Support</td>
</tr>
<tr>
<td>Relevance:</td>
<td>Public</td>
<td>Modified:</td>
<td>29.08.2020, 12:29 by Kronodoc Support</td>
</tr>
<tr>
<td>Type:</td>
<td>Resource document</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Description:</td>
<td>Mail link to Kronodoc support.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Files and URLs**

<table>
<thead>
<tr>
<th>Files:</th>
<th>No files</th>
</tr>
</thead>
<tbody>
<tr>
<td>URLs:</td>
<td>No URLs</td>
</tr>
</tbody>
</table>

**Lifecycle**

| Status: | Released | Lifecycle: Approval Lifecycle |

**Links**

- Clipboard: Copy • Add • View
- Present in folders: Item: Further References • List contents
- Parent documents: |
- Sub documents: |

**Comments**

- Add
- Comments: No comments

**Notifications**

- Subscriber notification: No subscriptions
- Notifications: No notifications

**Access control**

- Access profile: "No changes"

**Role accesses**

- List roles

**Link to this document:** [http://muscat.kronodoc.fi:8061;Kronodoc/AWALKTHRU/000019](http://muscat.kronodoc.fi:8061;Kronodoc/AWALKTHRU/000019)

**Title and Number** - Document title and number are used for identifying the document. By default, a new Kronodoc project uses incremental numbers for document numbering. In case Kronodoc is used as a front end to an EDMS, the code comes automatically from the remote system.

**Version** - Kronodoc supports versioning of documents. The document version number is a positive integer number starting from one. The number is incremented by the system when the user creates a new version of a document. Kronodoc can optionally record any changes to a document by automatically incrementing a minor revision counter.

**Type and Relevance** - Kronodoc has, by default, two hierarchical properties for document classification. These are called document type and relevance. Their exact meaning and the sets of available values can be configured separately for each project. Property values are selected using drop down menus when a new document is created or an existing one modified. The type attribute classifies documents according to their context (e.g. Engineering vs. Management), and the relevance attribute can be used, for example, to mark them relevant for reading by different audiences.

**Lifecycle** - Kronodoc supports lifecycle management of folders and documents. The document lifecycle defines the transitions a document can go from one status to another and the group of users who are allowed to trigger each transition.

**Status** - The status property indicates the state of the document within its lifecycle. Documents with an In Work or For Approval status are visualized with a red or a yellow or traffic light in the document list to indicate that any work depending on them may not yet proceed. Official or Released documents have a green light attached to them.
Present in folders - A list of links to all folders the document is linked to.

Parent documents - A list of links to all documents under which the document is linked to.

Subdocuments - A list of links to all documents that are linked under this document.

Files - A list of links to all physical files that have been attached to the document. For a new document, the field is empty until the first file has been attached to it.

URLs - A list of Web links that have been attached to the document. For a new document, the field is empty until the first Web link (URL) has been attached to it.

Notifications - In this properties field you can specify push notifications - a list of the project users, groups, and other email addresses that will get a notification every time the document is changed.

Subscriber notification - Registered users of a Kronodoc project can subscribe to notification emails about changes to a given document. Any changes to document properties or its files can trigger a notification.

Access control - Used to specify the access rights to the document. The access control heading indicates the currently active access profile.

Role accesses - Used to specify additional access rights to the document using roles.

8.3 Document Operation Links

The document properties page contains operation links, which let users perform certain actions. The following list contains standard Kronodoc operations. Visibility of the operations depends on the access rights that the user possesses for the document.

Operations in the "General" section ("General" and "All" tabs)

- **Edit** - Opens the document in the edit view.
- **Delete** - Deletes the document properties and files / URLs attached to it.
- **Send** - Send the document to other Kronodoc users or groups through email.
- **Lock** - Locks the document so that other users can not perform changes in it.
- **Version history** - Opens the document version history.

Operations in the "Files and URLs" section ("Files/links" and "All" tabs)

- **Add files** - Opens the file upload dialog, which lets the user select files from the desktop and upload them to the document.
- **Edit text file** - Opens the simple text editor for editing currently attached text and HTML files or add a new text / HTML file to the document.
- **Add URL** - Opens the dialog for adding a Web link (URL) to the document.
- **Delete** - Opens the file and URL delete dialog.

Operations in the "Lifecycle" section ("General" and "All" tabs)

- **New version** - Creates a new version of the document.
- **Change status** - Opens the status change dialog of the document.
- **History** - Opens the document operation history report.

Operations in the "Links" section ("Files/links" and "All" tabs)

- **Remove links** - Opens the folder and document unlinking dialog.
Create subdocument - Creates a subdocument to the current document.

Link document - Opens the dialog for linking the current document to recently visited items in the project (folders and documents)

Clipboard: Copy - Clear the clipboard and add the current document to its contents.

Clipboard: Add - Add the current document to the clipboard without clearing its contents.

Clipboard: View - View the clipboard contents.

Operations in the "Comments" section ("Collaboration" and "All" tabs)

Add - Add a new comment to the document.

View - View the comments attached to the document.

Operations in the "Notifications" section ("Collaboration" and "All" tabs)

Send - Send the document to other Kronodoc users or groups through email.

Subscribe - Click to subscribe to the document notifications.

Unsubscribe - Available when you have subscribed to the document notifications. Click to unsubscribe.

Operations in the "Role accesses" section ("Collaboration" and "All" tabs)

Add / Remove role accesses - Add or remove role accesses to the current document.

List roles - Opens the list of roles defined in the project.

8.4 Creating Documents

To create a document, navigate to the target container folder. In the document list select the "Tools" tab and click the "Create document" button (first from the left). An empty document properties page is displayed. Fill the properties and save them. (See also Creating Subdocuments, Document Tools in the Document List, Document Property Fields)

8.5 Creating Subdocuments

To create a subdocument, enter the document properties page, "Files/links" tab. Click the "Create subdocument" link. A document properties page is opened with the lifecycle, relevance and access profile settings are copied from the parent document. After saving the properties page, a new document is created and linked to the parent document.

8.6 Document Tools in the Document List

1 - Create document

To create a document, navigate to the target container folder. In the document list select the "Tools" tab and click "Create document" button (1). An empty document properties page is displayed. Fill the properties and save.

2 - Create document with file
To create a document with a file attached, in the document list select the "Tools" tab and click the "Create document with file" button (2). The file upload dialog is displayed. Select one or more files to be added to the new document and click the "Upload file" button. An empty document properties page is displayed. Fill the properties and save. (See also Adding Files to Documents)

3 - Create document with text file

To create a document with a text file, select the "Tools" tab and click the "Create document with text file" button (3). A simple text editor is displayed. Specify a name for the text file, and fill the contents. After saving, an empty document properties page is displayed with the text file attached. (See also Simple Text Files)

4 - Remove document

To remove a document from the current folder, select the document and click the "Remove document" button (4). It will unlink the document, if it is present in several folders, or delete it, if the document resides only in the current folder. (See also Deleting Documents)

8.7 Document Locking

The document lock functionality assures that only one user at a time can edit the document properties or attached files. Other users are not allowed to edit the contents of the document or upload files. Documents can be locked or unlocked automatically by the system or explicitly by the user.

Automatic locking

An automatic lock is applied when a user edits properties, adds or deletes files, or changes the status of the document. The lock is automatically released, when operation is completed or after 60 seconds.

Explicit lock

To lock the document, enter document properties page, "General" tab and click the "Lock" link. The explicit lock can be removed by the person who set the lock or a privileged project user, through unlock, status change or file upload operations.

Unlocking a document

To unlock a document, enter the properties page and click either the "Unlock" link (1) or the "Key" button (2).

A document can be unlocked in the document list (the Default view). Locked documents are indicated either by the LOCKED or UNLOCK operation links. LOCKED means that another user has locked the document and you cannot unlock it. UNLOCK indicates a document that you can unlock. Click to unlock.

8.8 Versioning Documents

Versioning a document creates a new instance of the same document with the same document number, but with different or changed properties and files. Versioning can be used to maintain previous editions of a document, while new editions are being made.

Creating a new document version from its properties page
To create a new document version, enter its properties page, "General" tab, "Lifecycle" section. Click the "New version" link. The link is available only on the latest version's properties page. A versioning dialog is displayed.

**Reason for new version**

Material is changed.

**Change current version status to** Leave as is

**Set new version status to**
- Initial "Simple Lifecycle" status
- Copy properties to new version
- Copy files to new version
- Copy subdocument links
- Move parent document links

Type in the "Reason for new version" and select status change options for the current and the new version. The reason for the new version is saved as a comment in the current document version. Statuses of the current and the new version are set according to your selections.

To copy the current document properties to the new version, select "Copy properties to new version".

To copy the files and URLs to the new version, select "Copy files to new version".

To copy the links from the Subdocuments section to the new version, select "Copy subdocument links".

To move the parent document links to the new version, select "Move parent document links". **Note:** Activating this selection moves a parent document link from the current version and removes it from the old one. However, if the parent document is in a frozen status, the parent document link(s) are not moved.

Last, click the "New version" button to create the new document version.

**Creating a new version in the document list**

Enter the document list, click the "Tools" tab and select the latest version of the document that you want to version. (The latest version is indicated by an underlined version number - e.g. v.2).

![Kronodoc Logo (new) v.2](Kronodoc logo.gif)

On the toolbar click the "Create new document" button (1). A form for the new document version creation is displayed.

8.9 Operation and Version History

**Operation history**

The operation history lists the actions, which have been performed to a document. The following actions are recorded: viewing, creating, status changes, and linking / unlinking and uploading / deleting files. If the user commits two consecutive actions of the same type, only one is listed (e.g. viewing document properties two times in a row). The operation history is saved for each document version separately.

To view the document operation history, enter document properties, "General" tab, "Lifecycle" section and click the "History" link.

**Version history**

The version history lists all document versions.
To access the document version history:
- In the document list click the version number, which is available next to the document name.
- In the document properties page, select the "General" tab and click the "Version history" link.

## 8.10 Deleting Documents

Deleting a document implies permanent and immediate removal from the system. Attached files and URLs are deleted as well. To delete a document, enter its properties page and click the "Delete" link, in the "General" section. The link is visible, if you have necessary rights to delete the document.
9 Files and URLs

Files and URLs are stored as attachments in Kronodoc documents. Files can be of any type and virtually any size. A URL is a Web link, which starts with http:// or https://. In Kronodoc, you can view files, attach (add) them to documents or perform file check-in/checkout operations.

9.1 Viewing Files

Files can be accessed in the document list or the document properties page, the "Files/links" tab.

View files in the document list

In the document list, files and URLs are displayed under the document name. To view a file, click its name. A filename does not have a link, if you do not have rights to access it.

Viewing files in the document properties page

Enter a document properties page; the "Files/links" tab. Attached files are visible under the section "Files and URLs". To view a file, click the "view" link next to the file.

9.2 Adding Files to Documents

Files can be added to a document in the document list or on its properties page. Files are added to documents by uploading them to the Kronodoc server. (Uploading is opposite to downloading.)

Add a file in the document list

In the document list select the "Tools" tab and navigate to the document that you want to add files to. Select the document.

Click the "Create new document with file" (2) button on the toolbar. If you don't have the right to add files to the document, an error message will be displayed. Otherwise, the file upload dialog is displayed.
Add a file in the document properties view

Enter the document properties and select the "Files/links" tab. The "Add files" link is visible in "Files and URLs" section, if you have the right to upload files. Click it, to start the file upload process.

Drag&drop file upload dialog

You can drag and drop files from your desktop directly into file list window (1 - in the picture below) or click the "Add Files ..." button (2), to initiate the file browser. If you have selected files, which you do not want to upload, select files from the list (1) and click "Remove Files" button (3).

When you have finished selecting files, press the "Upload" button.

Simple upload dialog (Drag&drop disabled or not using Microsoft Internet Explorer)

If you are not using Internet Explorer or the Drag&drop upload functionality is disabled in your Kronodoc installation, a simple upload dialog is displayed. It allows simultaneous upload of up to three files. Click the "Browse..." button, to select a file from your computer and click the "Upload" button at the bottom of the page. (The file is saved with a different name, if you enter it in the "Save as (optional)" field.

Notes:

1. The large file upload might timeout on slow Internet connections.
2. From Kronodoc 2.2 on, a full filename length can be up to 256 characters.
3. The filenames are case sensitive in Kronodoc. For example, files "Myfile.doc" and "myfile.doc" are uploaded as two separate files to a document due to their different capitalization. This distinction is important when you try to replace existing files.
9.3 Replacing Files or Upload to New Version

If the uploaded file already exists in the document and has the same name as an existing file, the user is asked to replace the existing file or to upload it to a new document version.

WARNING: The file(s) "About Kronodoc.txt" already exist in document. Are you really sure you want to replace the files?

Click the "Replace files" button to replace the existing file in Kronodoc.

Click the "Upload to new version" button to create a new document version and upload the file to it. See Versioning Documents.

The "Upload to new version" button is not displayed if:

· The file is not being uploaded for the latest document version.
· The user does not have the create document right in the current folder.

9.4 Deleting Files and URLs

To remove a file or an URL from a document, open the document properties page, select the "Files/links" tab and click the "Delete" link in the "Files and URLs" section.

Select files and/or URLs and click the "Delete files/URLs" button.

9.5 Checkout / Check-in Files

What does checking out/ in means?

"Checking out" a file means that you are reserving the file for editing and locking the document (so that other users cannot change it meanwhile). "Checking out" is otherwise similar to viewing (downloading) a file. The difference is that "Checking out" additionally locks the document and adds it as an entry to the "My checked out files list".

"Checking in" a file means that an edited file is being put back into the document and the lock is released. "Checking in" is similar to adding a file to a document (uploading). The difference is that a checked in file is automatically removed from the "My checked out files" list.

Checking out a file

When checking out a file, it is automatically added to the "My checked out files" list and the document becomes locked. To be able to check out files, a user must have the right to add files to the document.
To check out a file, in the document list or in the document properties page ("Files/links" tab) click the second mouse button on the "checkout" link. In the pop up menu select "Save target as..." to save the file on your computer.

Checking in a file

Go to the "My recent items" view and open the "My checked-out files" list. Click the "check-in" link next to the filename, which you want to check in. A file upload dialog is displayed. Browse to the file on your computer and upload it to the document. The document lock is automatically released and changes to the file are updated in Kronodoc.

9.6 Simple Text Files

A simple text editor allows creating and editing of unformatted text files (html and txt) directly in a browser window.

Creating a document with a text file

In the document list select the "Tools" tab and click the "New document with text" button (3). A text editor view is displayed (see picture below). Enter the filename and contents of the file. Press the "Save file" button to save the file and start document creation. Fill the document properties page and save.

Adding a text file (through the document list)

Enter the document list and select the "Tools" tab. Select the document you want to add a new text file to and click the "New document with text" button (3). The text editor is displayed. Enter the filename and the file contents and press the "Save file" button. The text file is attached to the selected document.

Adding a text file (through document properties page)
Enter the document properties page and select the "Files/links" tab. Click the "Edit text file" link. The text file editor is displayed. Enter file name and text and press "Save file" button. The text file is attached to selected document.

**Editing a text file in the browser - inline edit**

A text file can be edited by clicking the "inline edit" link next to the file that can be edited.

**Office Integration - Send to Kronodoc**

Files can be sent directly from Microsoft Office applications (Word, Excel and PowerPoint). It appears as additional menu bar, which is called "Send to Kronodoc", it lists Kronodoc installations in your company.

For the functionality to be available in your Office applications, Office add-ins have to be installed and configured. It is usually deployed in a centralized way, or you can install macros yourself. Please follow steps covered in PDF document, which is available in Kronodoc online Help Resources.

Functionality is supported with Internet Explorer 5.5 or higher and with following Office versions:

- Microsoft Office 97 SR2
- Microsoft Office 2000 SP2
- Microsoft Office XP SP2

To send a file from an Office application to Kronodoc, select "Send to Kronodoc" menu and choose the installation where you want to send the file to. This will start Internet Explorer and open Kronodoc installation, which you have chosen. Enter login information if requested and follow one of the following steps:

**Upload to recent document, where you have accessed a file with the same name**

After you have entered the project by pressing "Send to Kronodoc", the system will check, if you have recently accessed the file with the same name that you are currently sending to Kronodoc. If the name matches, file upload for document will be launched automatically. Check if the document selected is correct one and then upload file.

If you have been accessing several files with the same name, Kronodoc will let you choose, to which document to upload the file to.

List of recent files is taken from "My recent items" list, which includes 10 last accessed files.

**Upload file for a new document**

Enter the project and the folder, where you want to create a document with the Office file attached. In the document list, select the "Tools" tab and click the "New document with file" button (2).

File upload dialog is displayed, where you can change the name of the file and initiate the upload. Click the "Upload file for new document" button. A new document properties page is displayed, which should be filled in and saved.

**To upload file to an existing document**
Enter the project and the folder where the destination document is located. In the document list select the "Tools" tab, select the document and click the "New document with file" button (2).

The file upload dialog is displayed, where you can change the name of the file and initiate upload.

**To upload file to recent document**

Enter the project list and select "My recent items". Click the document name that you want to upload the file to. The file upload dialog is displayed, where you can change the name of the file and initiate upload.

<table>
<thead>
<tr>
<th>Upload to document</th>
<th>v.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document with two text files</td>
<td>1</td>
</tr>
</tbody>
</table>
10 Statuses and Lifecycles

The document or folder lifecycle determines the transitions from one status to another and gives a selected group of Kronodoc users the access rights to make a status transitions. Each lifecycle has an initial status, which is applied once a document or a folder is created.

For example, an approval lifecycle can consist of five statuses. Once created, a document enters the status "New". The status can be changed by any user to "In work" to indicate that the work on the document has started. Once the work is finished, the owner of the document can change it to "For Approval" - indicating that management can evaluate the contents. When approved, the status is changed to "Released". Once a document becomes outdated, it is moved to the status "Obsolete" and perhaps a new version is created.

Status colors are used for quick onscreen identification. These are the narrow color bars in the project and document list and in the document and folder summaries.

The lifecycle and status definitions can be specific to each project. To learn more about the lifecycles and statuses used in your organization, please contact your project administrator.

10.1 Changing Statuses

To change the status of a document or a folder, enter its properties page, "General" tab, "Lifecycle" section and click the "Change status" link. A status change dialog is displayed.

<table>
<thead>
<tr>
<th>Change status to</th>
<th>110 - For Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status change comment</td>
<td>added new pricelists. Now proposal seems to be completed - ready for approval.</td>
</tr>
</tbody>
</table>

Choose the desired status. Depending on the lifecycle definition, a user can have one or more statuses to choose from.

Enter a status change comment. In it, you can explain the reasons for the status transition.

Click the "Sign" button. The comment is added to the current document or folder and the status is changed.

10.2 Frozen Status

Documents or folders which are in a frozen status cannot be edited, linked / unlinked or deleted. Files cannot be added to a frozen document. Documents cannot be created in folders, which are in a frozen status. Only privileged project users can perform these operations with frozen items. Frozen documents are indicated with a snowflake icon on the document summary (see picture below).

Frozen folders are marked with a snowflake in the tree browser.
11 Copying and Linking Through Clipboard

The clipboard is available under the "Tools" tab in the document list. It provides functionality to copy, link, send and export documents and folders. The clipboard toolbar consists of 5 buttons:

1 - Copy - Clicking this button first empties the clipboard and then places the currently selected document(s) in it. If no documents are selected, the current folder is placed in the clipboard.

2 - Add - Acts the same as previous button, except the clipboard is not reset, but items are added to the current contents.

3 - Paste - Pastes the clipboard contents into the current folder.

4 - Link - Links the clipboard contents into the current folder.

5 - View - Click to open the clipboard. Inside the clipboard, you can view, send, clear or export (exporting is not allowed in all installations) the clipboard contents.

11.1 Copying or Adding to Clipboard

Copy a document

To copy a document to the clipboard, enter the document list and select the "Tools" tab. Navigate to the desired document and select it. Once selected, click the "Copy" button (1). Note that copying resets current contents of the clipboard. You can copy up to 50 documents at the time.

Add a document

You can add a document to the clipboard (without resetting the clipboard contents) by selecting it in the document list and pressing the "Add" button (2).

Copy or add a folder

To copy or add a folder to the clipboard, use the tree browser to navigate to the necessary folder. In the document list select the "Tools" tab. Click the "Copy" or "Add" button, depending on which action is desired.

Copy or add to clipboard through properties page

Documents and folders can be added to the clipboard, from the properties page by clicking the links "Copy" or "Add". The links are available in properties page under the "Files/links" ("Links") tab, in the "Links" section.

Links: Create sub-document, Link document. Clipboard: Copy • Add • Link • View
11.2 Pasting from Clipboard

Pasting duplicates clipboard items (documents and folders) and places them in the current folder. To paste, select the "Tools" tab in the document list and click the "Paste" (3) button.

The "Paste" link is also available on the folder properties page ("Links" tab, "Links" section). It pastes the clipboard contents in the current folder.

The pasted items are different from originals.

Differences between the pasted and the original

- Document number
- Status is set to initial in the lifecycle
- Comments are not pasted
- Subscriber notifications are not pasted

11.3 Linking and Unlinking

Documents and folders support links to other items inside the same project. A document or folder can be linked to several other items. The links between items can be used for classifying information and creating relational information structures. Linking and unlinking is useful, when you want to move an item from one folder to another. The links in Kronodoc have a directional value - describing the parent (container) and sub object (component).

11.3.1 Linking to Documents

Open the document list and select the "Tools" tab. Navigate to a document that you want to link and select it.

Click the "Copy" button on the clipboard (1). Navigate to the document that the selected document will be linked to, select it and press the "Link" button on the clipboard (4). The first document is linked as a subdocument.

Limitations

- If you have to link large quantities of documents, set clipboard with no more than 50 items at a time.
- If you select two or more documents in the document list and click the "Link" button, contents will be linked only to the first document selected.
11.3.2 Linking to Folders

Link a document

Select the desired document in the document list and click the "Copy" button on the clipboard (1). Navigate to the desired target folder and click the "Link" button (4).

Link a folder

Navigate to the desired folder and click the "Copy" button on the clipboard (1). Now, navigate to the desired target folder and click the "Link" button (4).

11.3.3 Linking to Recent Items

Link a document

A document can be linked to recently visited document or folder, which exists in the same project. Click the "Link document" link on the document properties page and select the target link item. The document is linked as a subdocument.

Link a folder

A folder can be linked to a recently visited folder, which exists in the same project. Click the "Link folder" link on the folder properties page and select the target link folder. The folder is linked as a subfolder.

11.3.4 Removing Links

Remove links from the document properties page

To unlink a document from the linked folders or its parent or subdocuments, enter the document properties page, select the "Files/links" tab, "Links" section. Click the "Remove links" operation link. Select the documents or folders and click the "Unlink" button.

Remove links from the folder properties page

To unlink a folder from its parent or subfolders, enter the folder properties page, select the "Links" tab, "Links" section. Click the "Remove links" operation link. Select the folders and click the "Unlink" button.

11.4 Clearing Clipboard

You can drop items from the clipboard one by one or clear the entire contents.

Drop items

Click the "View" (5) button to enter the clipboard. Select the items that you want to remove from clipboard and click "Drop items" link.
Clear clipboard

Click the "Clear" link. All items from the clipboard are removed.

Exporting Clipboard Items

Clipboard items (folders and documents) can be exported to a file and reused by importing it back in the same project.

Export

View the clipboard and select the items for export. Press the "Export" link. Kronodoc creates an archive file, which contains description of the exported items and attached files.

Contents of the exported archive file

The archive contains a CSV formatted properties file and file attachments in their original format. Files are identical to the originals in Kronodoc, except their names are extended with an internal document code prefix (e.g. Doc7419_sample.txt).
12 Access Rights

Access rights in Kronodoc projects are managed through Access controls and Roles.

An Access control is defined for each document and folder separately. When creating an item, user can select a predefined access profile, or create a custom access control.

12.1 Access Control Profiles

An access profile is a set of rights, which are defined on a project level by a project administrator. Consult your project administrator for instructions about access profile usage in your company. An access profile can be set while creating or editing a document. If you wish to fill an access control matrix yourself, select the "Custom access control"; otherwise choose an access control profile.

12.2 Filling Access Control Matrix - Custom Access Profiles

Filling an access matrix involves specifying actions that are given to the owner (of a document or folder), certain user groups, and other users, which are not members of Kronodoc user groups.

The document access matrix

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Edit</td>
<td>Delete</td>
<td>Add</td>
<td>Delete</td>
</tr>
<tr>
<td>Owner</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>managers</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>users</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Others</td>
<td>✔</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The folder access matrix

<table>
<thead>
<tr>
<th>Folder / View</th>
<th>Folder / Create subfolder</th>
<th>Folder / Edit</th>
<th>Folder / Delete</th>
<th>Folder contents / Create</th>
<th>Folder contents / List</th>
</tr>
</thead>
</table>
12.3 Role Based Access - Project Level

Users or user groups can have predefined roles, which give them certain privileges to all objects that are inside a project.

For example, an "Editor" role has been defined in a project. Users, who have the role, are able to access any document or folder and edit its properties. The role does not give the right to upload files. Therefore, if a user wants to add a file to a document, the document access control will be taken into account.

Users can have different roles in different projects. The roles you are assigned can be seen on the page footer.

User: "arnold" (Editor). Member of groups: "users"
Page created on 03.01.2003, 10:14 (EET) by Kronodoc 2.2b1 from templateset 'basic.en'

12.4 Role Based Access - Document Level

Roles can be used to fine grain access rights in a specific document. Users with edit access rights in a document can assign roles to other users and user groups. The functionality is available only if the project contains role definitions.

Adding and removing role based access

Open the document properties page and select the "Collaboration" tab. The current role accesses are shown and can be edited in the "Role accesses" section. If the section is not available, it means that project does not have any role definitions. Click the "Add / Remove role access" to edit the role accesses to the current document. To list the roles defined in the project, click the "List roles" link.

To add a document level role access:

1 - Enter a username or select a user group to which you want to assign the role. Select the role.
2 - Select the "Add also for subdocuments" option if you want to add the role accesses to the first level subdocuments. Click the "Add role to document" button.
3 - Added role accesses are displayed on the top part of the page, under the users or groups sections.
4 - If you want to remove a role access given to a user or a user group, click the Remove link next to the user or group.
12.5 User Types

Kronodoc distinguishes several user types, which have different set of rights.

Administrator and privileged user

The project and system administrator and privileged project users have unlimited access to documents and folders inside a project and can configure project wide settings. System administrator has additional rights to configure installation wide settings.

Group user

A group user access rights depend on the access control, which is set for individual folders and documents, and / or a set of roles. If a user belongs to several groups, the access rights will be a combination of rights given for all of the groups.

Owner

The owner is a creator of a document or a folder. Owners usually have more access rights than other group users. Owner rights are defined separately in an access matrix.

Others (guests)

Guest users are users, who have accessed a project with a "guest" login name or who have their own login name, but have no group membership inside the project. Yet Others (guest) rights can be defined separately in an access matrix.

Identify your user type

You can identify which user group you belong to, by checking the page footer (bottom of the document list). The user in the image below belongs to the group "users".

User: "arnold" (Editor). Member of groups: "users".
12.6 Forced Access Profiles

The project administrator can set access control to be forced by the item status. If access profile is forced, it cannot be changed by users. You can identify forced access profile by text "forced by status" next to the access profile name.

**Access control:** Access profile "No changes" (forced by status)
13 Collaboration

Kronodoc provides a set of collaboration tools: Commenting, Circulation, Notifications and What's New Reports.

13.1 Commenting

Commenting is an integrated part of any document or folder. Users can add comments, create threaded discussions and instantly vote on a given subject.

13.1.1 Viewing Comments

To view comments attached to a folder or a document, enter its properties page, select the "Collaboration" tab and click the "View" link under the "Comments" section.

Format selections

Comments can be viewed in three different views: long, short and simple. The long format is usually used. Yet if the list of comments is very long, you can switch to the short or simple view. The short format shows only author's user id and comment (no part comments). The simple format lists only the top level comments and their part comments.

| Format: [long | short | simple] |
|----------------------------------|
| Comment ordering: [threaded | by ascending / descending creation time] |

<table>
<thead>
<tr>
<th>Add</th>
<th>Author &amp; date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sub</td>
<td>Part</td>
</tr>
<tr>
<td>The attached file is a web version of the logo.</td>
<td></td>
</tr>
<tr>
<td>Other file: See the Kronodoc logo gif</td>
<td></td>
</tr>
<tr>
<td>Sub</td>
<td>Part</td>
</tr>
<tr>
<td>The file is OK. No changes needed.</td>
<td></td>
</tr>
</tbody>
</table>

Comment ordering commands

Threaded - structured list of comments sorted ascending by creation time. Subcomments follow comments they have been posted under.

Ascending/descending sorting - lists all comments according to their creation time. Subcomment and parent comment relationships are not shown.

Comment distribution (voting)

This is a reference that shows how many comments are posted as OK, For information or as Change requests. Click the "vote" link to add your vote (an empty classified comment is added to the document or folder).

Classification colors

Comment classification can be identified by a color: OK - green, Change request - red and For information - yellow.
13.1.2 Adding Comments

To add a comment, enter the document / folder properties page, select the "Collaboration" tab and click the "Add" link in the "Comments" section. The commenting page is displayed.

You can classify your comment as "OK", "For information" or "Change request". The classification is used to signal about an action that has to be taken regarding the comment. If the comment is classified as "Change request" it requires an action (see the picture above).

Then enter the comment contents. Note that the maximum length of a comment is 2000 characters. Last click the "Save comment". Note that saved comments cannot be removed or edited neither by group users or an administrator. Yet, you can add "Part comments" to the comments you have created.

13.1.3 Adding Subcomments

To add a subcomment, enter the document / folder properties page, select the "Collaboration" tab and click the "View" link in the "Comments" section. The comments view is displayed.

Click the "Sub" link in the comment that you want to post a subcomment to. A page will be displayed, where you can enter the subcomment.

13.1.4 Adding Part Comments

Part comments are used to add information to an already posted comment. Users can add part comments only to their own comments.

To add a part comment, enter the document / folder properties page, select the "Collaboration" tab and click the "View" link in the "Comments" section. Click the "Part" link in the comment that you want to add a part comment to.

From the "Concerning" drop down list select a relevant value: Chapter, Figures, Pages(s), Section or Other. In the field on the right enter, for instance, the number of the figure that you are referring to. Type the part comment contents in the text field and save it. Part comments like other comments cannot be edited or removed.
13.2 Circulation

Circulation lets you instantaneously forward document(s) or folder(s) to other Kronodoc users or user groups through email. The receiver will get your message and a link to the sent item.

13.2.1 Sending Current Document or Folder

To send a certain document or folder, enter its properties page, select the "General" tab and click the "Send" link. A send form is displayed.

Recipient(s)

- Users with a valid email address - select one or many email recipients from the list of Kronodoc users in the current project. The list contains only those Kronodoc project users, who have email address defined. To select (or unselect) several users, hold down the Control key on your keyboard while selecting.
- Groups - lists user groups in current Kronodoc project. The email will be sent to all users in the selected group.
- Free form email address - enter email addresses of the recipients, separated with comma.
- Send Cc: to myself - select, if you want the message to be forwarded to your email address.
- Hide recipient addresses - select if you want the message to be sent without disclosing email addresses (receiver will not know who else has got the email). The email addresses are set to the BCC: field of an email.

Subject

Enter the email subject.

Description

Enter the email message body.

Previewing and sending the message

Click the "Preview message" button to preview the message before sending. Click the "Send" button to send the message.
13.2.2 Sending Several Documents or Folders Through Clipboard

To send several documents or folders, first add them to the clipboard. View the clipboard contents and click the “Send” link.

13.3 What's New Reports

The What's new reports provide an instant feedback on activities, which have happened in a project. The scope of a report is from one day up to a week. The What's New report contains information about important changes in documents and folders such as status changes, commenting and file uploads. You can view the What's new report for the whole project or choose to see only activities in a certain structure (the last is not available on some installations). The What's new reports can be viewed online or subscribed for an email delivery.

13.3.1 Viewing What's New Online

To view the What's new report online, enter a project and click the "What's new" link, which is located in the top frame (above the document list).

What's new in project "Kronodoc Walkthru Project"

Subscribe

Scope: Project • recent folders / documents
Show changes: today • yesterday • last 3 days • last 7 days

Documents

000021 Kronodoc Logo (new) v.2
For information: Tiedosto on valmis.
System Administrator 19.03.2003, 14:59

000003 Network collaboration - The big picture v.1
Change status to Released
System Administrator 19.03.2003, 14:58

Scope

Select to change the scope of What's new report
By default the scope is set to "Project", which means that changes are shown in the whole project.
Folder "Project root folder" and subfolders (see picture above) - select to scope report to the current structure (folders and subfolders). To change scope to another folder, select the folder in the tree browser.
Recent folders / documents - select to list changes only in the recently accessed folders, which are listed in the "My recent items" view.
Subscriptions - the changes in the project are shown according to your What's new report subscriptions. The view also includes the unsubscribe section at the bottom of the page.

Show changes

Select to change time frame of changes in What's new report.
Today - shows changes, which have happened today.
Yesterday - shows changes, which have happened today and yesterday.
Last 3 days - shows changes, which have happened in the last three days period.
Last 7 days - shows changes, which have happened in the last seven days period.

Note: Scoping according to the folder structure is not available on all Kronodoc installations.
13.3.2 What's New Contents

The What's new report provides an overview about recent activities in a project. The report covers the following operations:

**Document operations**
- creation
- versioning
- status changes
- commenting
- file upload
- URL adding

**Folder operations**
- creation of subfolders and structures
- status changes
- commenting

The What's new report does not include documents, folders or files that have been deleted.

13.3.3 What's New Icons

The What's new report includes a set of icons that represent document or folder operations:

- Document creation or versioning
- File upload or replacement
- URL adding
- Commenting
- Status change. Arrow color represents color of the status, document or folder has been moved to
- Subfolder or structure creation

13.3.4 Subscribing to What's New

You can subscribe to the What's new report and receive it daily in the mornings.

**Subscribing to the project wide report**

Open the What's new report and click the "Subscribe" link. The link is available under the report title (top left). You have subscribed to the report, if you see an envelope icon next to the report title.

**Subscribing to a substructure report**

If you are interested in daily changes only in a specific structure or subfolder: you can open the What's new report and navigate to the desired folder using the tree browser. In the What's new report select the scope by the name of the desired folder. Click the "Subscribe" link under the title of the What's new report. This way, you can subscribe to several substructures.
What’s new email contents

The What’s new report that you receive in email, is the same as you would see online. It provides activity situation of last day and combines all subscriptions that you have made in one report. The What’s new report is not delivered, if no activity has taken place during the previous day.

Unsubscribing

You can unsubscribe from the What’s new report in one of the following ways:

- Click the "Unsubscribe" link under the What’s new report, that you are viewing (picture above).
- Click the "Unsubscribe" link, which appears on the bottom of the What’s new report email (picture below).
- View the What’s new report and select the Subscriptions scope. The Unsubscribe links are available in the bottom of the page (picture below).

```
Subscriptions:
Project root folder -- [ unsubscribe ]
unsubscribe all
```

13.4 Notifications

Notifications provide a way to stay informed about status of individual folders or documents. Notifications are delivered to the users through email or posted in their personal notification inboxes. In Kronodoc you can subscribe to notifications for yourself or push notifications to other Kronodoc users.

Before using notifications, configure them according to your preferences.

13.4.1 Notification Triggers

Notification are triggered by following document operations

- Save document properties
- New version
- Change status
- Add URL
- Upload file
- Delete document
- Delete file/URL

Notification are triggered by following folder operations

- Save folder properties
- Create subfolder
- Change status
- Create document in folder
- Delete folder

13.4.2 Subscriber Notifications

Subscriber notifications are available for documents and folders. You can subscribe and unsubscribe to notifications from the document or folder properties pages.

Subscribing

To subscribe to notifications, enter the folder or document properties page and select the "Collaboration" tab. Click the "Subscribe" link in the "Notifications" section. Your username will appear in the "Subscriber notification" field and subscription icon in the document or folder summary (as in the picture below).
Unsubscribing

To unsubscribe, enter the folder or document properties page you have subscribed to and select the "Collaboration" tab. Click the "Unsubscribe" link in the "Notifications" section. The subscription icon and your username in subscriber notifications section should now disappear.

13.4.3 Push Notifications

You can use push notifications to inform others about changes in a certain folder or document. Push notifications use project wide notification settings, which are defined by a project administrator.

Adding a push notification

To push a notification, enter the document or folder properties page in the edit mode (click the "Edit" link in the "General" section of the properties page). Scroll down to the section "Notifications" and add username, user group or email address. Separate several recipients with comma. Select the "Kronodoc users, groups and email addresses" (as in the picture below) if you want to enable the push notifications. Save the properties.

<table>
<thead>
<tr>
<th>Notification</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Removing, disabling push notification

Unselect "Kronodoc users, groups and email addresses" and/or delete user name, group or email address. Save properties.
14 My Recent Items

You can view recently accessed files, documents and folders in "My recent items" list.

14.1 Recently Accessed Items

The recent items list holds up to 10 files, 5 documents and 5 folders, which you have accessed in a Kronodoc installation (across all projects). In the list you can see the date and time of access, last action and the item name. To view the item (properties), click its name.

To view the recent items, click the "My recent items" link in the project list or the link on the top frame while inside a project.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>03.01.2003, 14:04</td>
<td>Get</td>
<td>About Kronodoc.txt</td>
<td>Document with two text files</td>
<td>1</td>
</tr>
</tbody>
</table>

The recent items list contains a "snapshot" of item names and links. It means that if someone else has changed the name of a folder or document, you will see the document with its old name. If you notice, that the lists contains many outdated items or broken links, it could be useful to clear the list.

Clearing the "My recent items" list

To clear the recent items list, click the "Clear" link in the top of list. It will clear the current list: either Recent items or Checked out files.

14.2 My Checked Out Files

The checked out files list contains links to files that you have checked out for editing in a Kronodoc installation. Through the list you can check files back in. To access the checked out files list, click the "My checked out files" link, in "My recent items" view.
15 Dashboard

The dashboard is a set of reports, which provide users and managers with Kronodoc project performance information: Usage statistics, Work status, Work progress (Project Dashboard) and Throughput time and Communication analysis (Advanced Dashboard).

Dashboard can be accessed through the "Dashboard" link, which is located in the top frame inside a project. If the link is not visible, it means that the Dashboard functionality has been disabled.

15.1 Project Dashboard

Project Dashboard includes basic data for Kronodoc project progress analysis:

- Usage statistics - statistics about user connections and logins on a monthly or a weekly basis.
- Work status - distribution analysis per information type (folder, document, file)
- Work progress - time based analysis about different information types (folders, documents, files)

15.1.1 Usage Statistics

Usage statistics illustrates the usage of Kronodoc. Check the report to evaluate general activity in the project on weekly or monthly basis.

<table>
<thead>
<tr>
<th>Month</th>
<th>Amount of different machines connected in:</th>
<th>Amount of distinct users logged in</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2002</td>
<td>4</td>
<td>2</td>
</tr>
<tr>
<td>December 2002</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Month</th>
<th>Amount of connections in:</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2002</td>
<td>586</td>
</tr>
<tr>
<td>December 2002</td>
<td>287</td>
</tr>
</tbody>
</table>

15.1.2 Work Status

The work status reports contain aggregate data about the information items in a project: files, documents and folders. You can view detailed distribution graphs about each information type.
15.1.3 Work Progress

The work progress reports bring information type analysis to another level. For example, with help of the reports you can find out answers to the following questions:

- How many "Contracts" did we have last Monday?
- How many percent of "Released" documents did we have last month and how much now?
- How many new folders have been created over the last month?

Work progress reports are collected by the system every Monday morning.

15.2 Advanced Dashboard

The advanced Dashboard is used to analyze project processes and collaboration patterns.

- Throughput time - provides in depth analysis on status transitions in a certain document / folder lifecycle
- Communication - shows the communication matrix of Kronodoc users

15.2.1 Throughput Time

In the "Throughput time" analysis, first choose the document or folder lifecycle to analyze ("Options" section). Then select the start and end statuses.

Analyse throughput times for document lifecycle:

<table>
<thead>
<tr>
<th>Start status:</th>
<th>Released (120)</th>
<th>Read notification (NTF_2)</th>
<th>New (30)</th>
<th>Obsolete (130)</th>
<th>For Approval (110)</th>
<th>In Work (100)</th>
<th>New notification (NTF_1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>End status:</td>
<td>Released (120)</td>
<td>Read notification (NTF_2)</td>
<td>New (30)</td>
<td>Obsolete (130)</td>
<td>For Approval (110)</td>
<td>In Work (100)</td>
<td>New notification (NTF_1)</td>
</tr>
</tbody>
</table>

After the selection has been made, you can view four reports

- Overview - lists paths that documents or folders take from the initial to the final lifecycle status. Various analysis data is provided, which helps decision makers to optimize current processes.
- Transitions - analyze the time taken to move document / folders from one status to another
- Current status - tells how many documents are currently in certain lifecycle status.
- Inventory - monitor WIP (work in progress) and process dynamics
15.2.2 Communication

The communication reports illustrate user collaboration patterns based on functional communication (Readers, Writers and Approvers). By using the tool, you can easily identify if information is being spread across all project members, or the project processes mainly concentrate around a certain group of people.
16 Settings

In the settings view users can specify user interface settings, personal properties (name, email and password) or notification preferences.

16.1 Changing Name, Email, Password

To change the name, email or password, click the "Settings" link in the top frame inside a project. In the configuration tree, navigate to the user icon, with your username in the title. In the following view you can change the first and last name, email address, organisation, default group and password.

Change the desired values and click the "Save user" button to complete changes.

Password verification

When changing an existing password, Kronodoc does some basic verification to assure the quality of your password. The purpose of this is to ensure a higher information security in your organisation and to prevent possible attackers from guessing the most obvious of passwords.

The checks Kronodoc makes are statistic in nature and examine the password character distributions. If a bad password has been chosen Kronodoc gives you an error message and the password is not changed. This functionality does not check your old password, it only affects when passwords are changed or new ones created.

Notes:
1. You don't have to enter the password, if you are changing, for instance, the email address. The "Password" fields
16.2 Configuring Notification Preferences

Before you start using the notification service, configure your notification preferences - define the operation which trigger notifications and set the destination inbox for notification messages (Kronodoc notification inbox or your email address).

Access notification preferences

Click the "Settings" link in the top frame inside project. In the settings view, open the "Notification.preferences" folder (see the picture below). You can also access notification preferences through the notification inbox. Enter the notification inbox (envelope in the tree browser) and click the "Edit notification preferences" link. The personal notification preferences edit screen is opened.

The project privileged users can also edit project wide notification preferences.

Configure notification preferences

Delivery method - select whether to receive notifications in the Web inbox (personal notifications inbox in Kronodoc - the envelope in the tree browser) or Email (your personal email address defined in Kronodoc).

Send frequency - select whether notifications are sent Immediately (notifications are collected every 10 minutes), Daily (weekday mornings) or once a Week (Monday mornings).

Select the folder / document actions, which should trigger the notifications.

Save the notification preferences by clicking the "Save notif prefs" button. Once you have saved your personal notification preferences, a new button appears - "Revert to default prefs". You can revert to the project wide notification preferences by clicking it.
**Project wide notification preferences**

Project wide notification preferences are configured by project privileged users or by the administrator. These preferences are used as a default for all users (unless they have defined their own) and all push notifications. Users can revert to the project wide notifications by clicking "Revert to default prefs" button in the Notification preferences view.

### 16.3 User Interface Settings

In the user interface settings you can define colors, templates to be used and document listing options.

**Installation wide vs. Project level settings**

User interface settings can be defined on an installation or a project level. The installation wide settings will be applied to all projects, unless you have specified user interface setting in a project.

As you can see in the picture below, there are two "User.interface" selections available in the settings view. The one on the top palette icon refers to the installation (all projects) while the lower one to the current project.

---

**16.3.1 Colors**

**Changing the user interface colors**

Users can define colors to be used for representing different parts of Kronodoc user interface. To change colors of the tree browser, modify settings under the "Navigator frame" section. To change general color settings, modify settings under "Document list Frame" section.

To change a color value, select it with color selector: 🌅 🌅 🌅 🌅 🌅 🌅, or enter a six letter color code in an appropriate field.

If for some reason a color field is empty, it is displayed in the user interface as black.

**Color usage**

The default colors are listed in brackets.

- Navigator background color - Background color for tree the browser. (F0F0F0)
- Navigator line color - Lines, which connect folders in the tree browser. (9CABB7)
- Navigator closed text color - Folder name color in the tree browser, when it is not selected. (303030)
- Navigator open text color - Folder name color in the tree browser, when it is selected. (2654C7)
- Navigator hidited text color - Folder name color in the tree browser, when the mouse is moved over it. (2654C7)
- Page background color - The background color of any page. (FFFFFF)
- Title background - The background color for documents in the default document list, and field names. (D8D8D8)
- Value background - The background color for files in the default document list, and field values. (F0F0F0)
- Header background - The background color for top frame, table headers and properties page sections. (BEDAC2)
- Node color - The second color in the top frame, and the folder header background. (E2E2E2)
- Document color - The background color of the document summary field. (FFFFFF)
16.3.2 Open Files and Links in New Window

You can set to open files or URLs in a new browser window, by selecting options:

- Open files in new window
- Open URLs in new window

If not selected, files and URLs will open in the document list frame.

16.3.3 Language and Time Zone Settings

In Kronodoc you can easily switch the user interface language and time zone.

Language

If supported on your installation, you can run Kronodoc in different languages. You can switch language by changing the "Locale" field.

<table>
<thead>
<tr>
<th>Localization</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Locale</strong></td>
</tr>
<tr>
<td><strong>Timezone</strong></td>
</tr>
</tbody>
</table>

Time zone

You can change the time zone, in which you are using Kronodoc, by selecting it from the drop down list.

16.3.4 Template Set

Kronodoc uses special templates to generate the user environment. Your installation might support different templates for different organizational functions.

To change the template set, choose it from the "Template set to use" drop down list.

The standard template set shipped with Kronodoc product is "Kronodoc basic user-interface".
16.3.5 Setting Default Document Filters

The default document filters are applied every time you enter the project or reset the applied filters. To change the default document filters, enter the “Settings” view, select “User interface” settings. In the section “Document list frame” change the values of the fields that are shown in the picture below.

<table>
<thead>
<tr>
<th>Filter</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>View only docs of given status</td>
<td>All</td>
</tr>
<tr>
<td>View only docs of given type</td>
<td>All</td>
</tr>
<tr>
<td>View only docs of given relevance</td>
<td>All</td>
</tr>
<tr>
<td>View only document versions</td>
<td>All</td>
</tr>
<tr>
<td>Search scope</td>
<td>All folders</td>
</tr>
</tbody>
</table>

16.3.6 Saving UI Settings and Reverting to Default

The user interface settings are applied once saved. To save changes in the user interface setting, click “Save user interface” button. Now all changes should be saved and the “Revert to the default user interface” button available on the bottom of the page. You can revert to settings defined on the installation scope or the project administrator has defined for the project, by clicking the button.

16.4 Time Format Settings

- % %  same as %
- %a  locale’s abbreviated weekday name
- %A  locale’s full weekday name
- %b  locale’s abbreviated month name
- %B  locale’s full month name
- %c  locale’s appropriate date and time representation
- %C  locale’s date and time representation as produced by date(1)
- %d  day of month ( 01 - 31 )
- %D  date as %m/%d/%y
- %e  day of month (1-31; single digits are preceded by a blank)
- %h  locale’s abbreviated month name.
- %H  hour ( 00 - 23 )
- %I  hour ( 01 - 12 )
- %j  day number of year ( 001 - 366 )
- %m  month number ( 01 - 12 )
- %M  minute ( 00 - 59 )
- %n  same as new-line
- %p  locale’s equivalent of either AM or PM
- %r  time as %I:%M:%S [AM|PM]
- %R  time as %H:%M
- %S  seconds ( 00 - 61 ), allows for leap seconds
- %t  same as a tab
- %T  time as %H:%M:%S
- %w  weekday number ( 0 - 6 ), Sunday = 0
- %x  locale’s appropriate date representation
- %X  locale’s appropriate time representation
- %y  year within century ( 00 - 99 )
- %Y  year as cyy ( e.g. 1986)
- %Z  time zone name or no characters if no time zone exists
17 Other Topics

This section includes reference topics, which might be useful to know.

17.1 System Requirements

**Desktop:** Windows PC running Win98, NT, 2000 or XP that is used for common office work.

**Browser:** Internet Explorer version 5.5 or later (IE required for drag & drop check-in), Netscape Navigator 4.79 or later (for limited functionality)

**Note:** System requirements can be changed without prior notice.

17.2 Sorting

**Project and document list sorting**

Sorting is performed when the sorting property link is clicked. For instance, to sort the projects by their name, click the link, which is located in the top row of the project list - "Name".

Once the list is sorted, the sorting order is indicated by icons: ▲ (ascending) and ▼ (descending). To change the sorting order, you have to click the sorting link again.

Sorting in Kronodoc is performed either by a visible or a hidden value. The sorting type is predefined for specific fields and cannot be changed by users.

Fields sorted by a **visible value** are: Name, Code, Administrator, Author, Author email, Modified, Version, Description and extended properties.

Fields sorted by a **hidden value** (field code defined by project administrator) are: Status, Type, Relevance and Lifecycle.

If the list is sorted in an ascending order, first would come the values which start with numbers, then capital letters and then lowercase letters.

**Example:**

<table>
<thead>
<tr>
<th>Name ▲</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st project</td>
</tr>
<tr>
<td>2nd project</td>
</tr>
<tr>
<td>Alpha project</td>
</tr>
<tr>
<td>Beta project</td>
</tr>
<tr>
<td>alpha project</td>
</tr>
<tr>
<td>beta project</td>
</tr>
</tbody>
</table>

17.3 Kronodoc Specific Icons and Buttons

The following list contains Kronodoc specific icons and buttons. An icon has only the representative value, while button also triggers an operation, when clicked on it.

*Tool icons under the "Tools" tab in the document list*
<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Create document</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab. Enabled if a user has the right to create documents in the current folder.</td>
</tr>
<tr>
<td></td>
<td><strong>Create document with file</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab.</td>
</tr>
<tr>
<td></td>
<td><strong>Create document with text file</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab.</td>
</tr>
<tr>
<td></td>
<td><strong>Remove document(s)</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab.</td>
</tr>
<tr>
<td></td>
<td><strong>Clipboard icons under “Tools” tab in the document list</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Clipboard set / Copy</strong> button</td>
<td>Click to clear the clipboard and add the documents the document selected in the document list. If no documents are selected the clipboard is reset and the current folder is added to the clipboard.</td>
</tr>
<tr>
<td></td>
<td><strong>Clipboard add / Copy +</strong> button</td>
<td>Adds selected documents to the clipboard without resetting. If no documents are selected the current folder is added to the clipboard.</td>
</tr>
<tr>
<td></td>
<td><strong>Clipboard paste</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab if the clipboard is not empty. Pastes clipboard items in the current folder. The action requires access rights for document creation in the current folder.</td>
</tr>
<tr>
<td></td>
<td><strong>Clipboard link</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab, if the clipboard is not empty. Links clipboard items in the current folder. The action requires edit access rights to the source items in the clipboard and the right to created documents in the target folder.</td>
</tr>
<tr>
<td></td>
<td><strong>View clipboard</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab, if the clipboard is not empty. Opens the clipboard for viewing its contents and accessing other clipboard functionality.</td>
</tr>
<tr>
<td></td>
<td><strong>Folder and Document icons</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Icon</strong></td>
<td><strong>Name</strong></td>
</tr>
<tr>
<td></td>
<td><strong>Clipboard set / Copy</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab.</td>
</tr>
<tr>
<td></td>
<td><strong>Clipboard add / Copy +</strong> button</td>
<td>Available in the document list under the &quot;Tools&quot; tab.</td>
</tr>
</tbody>
</table>
Folder icon
Indicates an open folder. Contains properties, documents, comments.

Document icon

Locked (key) button
Shown in the document summary, if the current user has locked it.

Locked (lock) button
Shown in the document summary if another user has locked the document.

Subscription active icon
Visible in the folder and document properties and What's new report a user has subscribed to.

Other icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>🗂️</td>
<td>Document list button</td>
<td>Available in a What's new report, after the Send operation or on the clipboard, etc., if you have rights to list the contents of the current folder. Click to view the document list.</td>
</tr>
<tr>
<td>🌨️</td>
<td>Snowflake icon</td>
<td>Indicates that an item (project, document or folder) is frozen and cannot be edited.</td>
</tr>
<tr>
<td>🌐</td>
<td>Kronodoc project icon/button</td>
<td>The default project icon available in the project list. System administrator can hide or change the icon for each project. Opens the project web page (if one exists). By default it opens <a href="http://www.kronodoc.com">http://www.kronodoc.com</a>.</td>
</tr>
<tr>
<td>🚰️</td>
<td>Sort ascending icon</td>
<td>Indicates that the project or document list is sorted ascending by the parameter the icon stands next to.</td>
</tr>
<tr>
<td>🔳️</td>
<td>Sort descending icon</td>
<td>Indicates that the project or document list is sorted descending by the parameter the icon stands next to.</td>
</tr>
<tr>
<td>✅</td>
<td>Option selected icon</td>
<td>Shown in access profiles. Indicates access rights for user group.</td>
</tr>
</tbody>
</table>
**Keyword Index**

- **A** -  
  Access control  39, 42  
  Access matrix  39  
  Access profile  39  

- **C** -  
  Check in/out  30, 50  
  Circulation  45, 46  
  Clipboard  35, 36, 37, 38  
  Comments  43, 44  
  Copying  35  

- **D** -  
  Dashboard  51, 52, 53  
  Deleting  27, 30  
  Document list  11, 13, 14  
  Document search  11  
  Document status  34  
  Documents  21, 22, 24, 27  

- **E** -  
  Exporting  35, 38  

- **F** -  
  Files  28, 30, 31, 32  
  Folders  17, 20, 27  
  Forced access profile  42  
  Frozen status  34  

- **H** -  
  History  26  

- **I** -  
  Icons  59  

- **L** -  
  Lifecycle  34  
  Linking  35, 36, 37  
  Login  7  
  Logout  8  

- **M** -  
  My recent items  50  

- **N** -  
  Navigating folders  9  
  Notifications  48, 49, 55  

- **O** -  
  Office documents  32  

- **P** -  
  Pasting  35, 36  
  Project list  7  
  Push notifications  49  

- **R** -  
  Role based access  40  

- **S** -  
  Search  15, 16  
  Send  45, 46  
  Send to Kronodoc  32  
  Settings  54, 55, 56  
  Sorting  59  
  Status  34  
  Subscriber notifications  48  
  System requirements  59  

- **T** -  
  Text files  31  
  Tree browser  9  

- **U** -  
  Unlinking  37  
  User types  41  

- **V** -  
  Versioning  25  

- **W** -  
  What's new  46, 47