2021.2

WorkZone Configuration Management

Online Help

Contents

WorkZone Configuration Management 2021.2 Online Help

This Online Help describes how to configure WorkZone Content Server, WorkZone Client, Captia Web Client, and WorkZone Explorer using WorkZone Configuration Management.

The intended target audience for this guide is system administrators who configure and maintain the basic data, which makes up the foundation for working with WorkZone Content Server, WorkZone Client, Captia Web Client, and WorkZone Explorer.

WorkZone links

- WorkZone documentation
- WorkZone support
- WorkZone website
- WorkZone portal

What's new

WorkZone Configuration Management 2021.2

No changes in this release.

WorkZone Configuration Management 2021.1

No changes in this release.

WorkZone Configuration Management 2021.0

No changes in this release.

WorkZone Configuration Management 2020.3

No changes in this release.

WorkZone Configuration Management 2020.2

No changes in this release.

WorkZone Configuration Management 2020.1

No changes in this release.

WorkZone Configuration Management 2020.0

All Use Log functionality has been moved from WorkZone Configuration Management to WorkZone Configurator.

For more information, see The Use Log

USELOGADM and USERADM access code changes

The USERADM access code is now required to access, search and view the Use Log module and the USELOGADM access code is required to start and stop the Use Log. This change affects all methods of accessing the Use Log (either through WorkZone Configurator or the ODATA interface.

WorkZone Content Server 2019.3

USELOGADM and USERADM access code changes

The USERADM access code is required to see the Use Log menu in WorkZone Configuration Management. Both the USERADM and the USELOGADM access code are required for a user to access, search and view the Use Log module as well as start and stop the Use Log.

The USELOGADM access code also grants access to the Use Log through the ODATA interface.

WorkZone Configuration Management 2019.2

No changes in this release.

WorkZone Configuration Management 2019.1

No changes in this release.

WorkZone Configuration Management 2019.0

No changes in this release.

WorkZone Configuration Management 2018.2

No changes in this release.

WorkZone Configuration Management 2018.1

No changes in this release.

WorkZone Configuration Management 2018.0

- Topics that describe general WorkZone Process settings and settings that apply to the SmartPost process have been revised. Dispatcher settings that were previously part of the Process settings have been split in to specific dispatcher types (e-Boks, Straalfors, and local print) and moved to a new **Dispatcher** module. See The Process Dispatchers Module.
- The **Lost and Found** module has been removed from the **Diagnostics** module and replaced with new Dashboard lists (**Hidden cases**, **Hidden documents** and **Hidden contacts**) in the WorkZone Client and a new **Hidden Elements (da. Skjulte Elementer)** menu in the Captia Web Client. The new lists and menu enable a user to find hidden WorkZone cases, documents and contacts. Only users with the '*' System Access code can see hidden cases, documents or contacts. A new WorkZone LOSTANDFOUND system access code has been introduced which enables users to access to the **Hidden Elements (da. Skjulte Elementer)** menu in the Captia Web Client.

WorkZone Configuration Management 2017

Operation module

- The Document Formats module has been removed and will be replaced by a new Documents Formats module in the new WorkZone Configuration Management.

Classification Scheme module

- It is now possible to select **@Unit** in the **Responsible OU** and **Executing OU** fields, which applies the unit of the current user who creates cases in the specific case class. Likewise, you can now select **@Me** in the **Case Handler** field to apply the current user who creates the case in the specific case class as case handler. See Classification scheme meta data.
- **@Unit** is now applied by default to the **Responsible OU** field on the SJ-TEMP class.

Basic Data module

- You can now create corporate access codes from this module, which you can then apply to file classes or contacts, see Create Corporate Access Codes.

WorkZone Configuration Management 2016 R2

- The format of the search criteria that is shown in the **Search XML** column in the use log has been simplified, see .

WorkZone Configuration Management 2016

- Improvements to the Use Log module
  - Two new sections have been added to the Use Log module. **Info**, which displays information about the use log, see . **Transfer job status**, which shows the status of the job that transfers the current use logs to the monthly use log, see .
  - The use log has been extended to show when users create, update, or search for documents. This is indicated by **I** (insert) , **U** (update), or **S** (search) in the **Action** column and **#document** in the **Register** column of the log. See .
  - The setup and maintenance of use log tables have been changed to increase performance. See .

- A new system owned class SJ-AGENDA which is used by WorkZone Meeting has been added. See Mandatory system owned classes.

WorkZone Configuration Management 2014 R2

No changes in this release.

WorkZone Configuration Management 2014

- The Online Help for WorkZone Configuration Management is now available online on WorkZone Documentation web site. You can also access it directly from WorkZone Configuration Management.
- It is now possible to assign universal access codes to users from the **Users** module, see Users meta data.
- A new section on parallel case creation has been added to the About case number formats topic.

Getting Started

WorkZone Configuration Management is a configuration tool that system administrators use to configure and maintain basic data that makes up the foundation for working with WorkZone Content Server and the various WorkZone clients.

WorkZone Configuration Management consists of several modules. Each module gives access to a specific part of the basic data or configuration options.

Who is allowed to do what ?

To gain access to a specific module, you need adequate authorization, which means that your user profile must contain the system access code corresponding to the access code of the modules. See Access codes.

Configuring Configuration Management

You can configure WorkZone Configuration Management to handle either a single language or several languages. See Language mode.

Modules in WorkZone Configuration Management

The table below displays the names of the modules and the data types, which are maintained in them.

Basic data

Module	Data Type
Countries and postcodes	Countries and post codes
Custom label	Labels
Custom domain	Domains and their values

Module	Data Type
Filing periods	Preservation and disposal codes
Contact	Contact types
Stopwords	Words to be disregarded in searches
The Terms Mod-ule	Tool for the KMD technicians only

Categories

Module	Data Type
Classification Scheme	The classification scheme
Facet-based classification scheme	Facets
Dictionary	The dictionary containing keywords
Subnumbers	Subnumbers

Security

Module	Data Type
Register Security	Security configuration for registers and tables

Diagnostic

Module	Data Type
Diagnostic Module	Read about: • Trace Output • Enable sjDebug Output

Operation

Module	Data Type
Owner	Owner specific information and configuration
Users	Users
Preference Profiles	Profiles
Restricting Profiles	Profiles
Record Access	Default configuration of record access
External Sources	Configuration of external integrations (third party programs or services)
Service channels	Configuration of data transfers (import of data from third parties or services)

Options

Settings	Configuration of
Language	Current language and language mode
Gridviews	Default displayed items
Warnings	Extend of warnings and the level of sensitivity
Custom Label	Show all or only active items
Custom Domain	Show all or only active items

Prerequisites

This section describes the prerequisites for working with WorkZone Configuration Management.

Prerequisites overview

To work in WorkZone Configuration Management, the following conditions must be in place:

- WorkZone Configuration Management must be installed , see Installation.
- You must have the necessary authorization to open the WorkZone Configuration Management modules. This authorization consists of a set of system access codes assigned to you in Active Directory, see Access codes.
- You must be set up to work in Captia Web Client without the limitations of a profile, see Profile.
- You can choose to work in either **multi** or **single language mode**, see Language mode.

Installation

After installing WorkZone Configuration Management on the server, you need to install the new version locally on your PC. When you open WorkZone Configuration Management, you are prompted to install the new version of WorkZone Configuration Management on your PC. The program file is called Scanjour.Sysadm.exe.

For more information, see Installation Guide for WorkZone Configuration Management.

Access codes

WorkZone Configuration Management contains a number of modules. To gain access to a specific module (and/or sub functions), your user profile must contain the corresponding access codes.

Allocation and management of access codes is done through Active Directory. Below is a list of the specific access codes:

Basic Data	Access code
Countries and Postcodes	DATAADM
Custom Label	DATAADM
Custom Domain	DATAADM
Filing Period	DATAADM
Contact	DATAADM
Stopwords	DATAADM
Terms	TERMSADM

Categories	Access code
Classification Scheme	DATAADM
Facet	DATAADM
Dictionary	DATAADM
Subnumbers	DATAADM

Security	Access code
Register Security	DATAADM

Diagnostics	Access code
Process Log	PROCESSADM
Process State	PROCESSADM
Trace Output	DIAGADM
Enable sjDebug Output	No access code is needed.

Operation	Access code
Owner	USERADM
Users	USERADM
Restricting Profiles	PROFILADM
Preference Profiles	PROFILADM
Processes	PROCESSADM
Service Workflows	PROCESSADM
Process Settings	PROCESSADM
Process Dispatcher	PROCESSADM
e-Boks Material	PROCESSADM
Remote Print Types	PROCESSADM
Dispatch Types	PROCESSADM
Record Access	PROFILADM
External Sources	DATAADM
Service Channels	DATAADM

Options	Access code
Language	DATAADM

Options	Access code
Gridviews	DATAADM
Warnings	DATAADM
Custom Label	DATAADM
Custom Domain	DATAADM

Profile

An important precondition for working in WorkZone Configuration Management is that your administration user has no profile limitations. Working on the basis of a profile may mean that you only see a limited part of the data contained in some of the modules.

The purpose of the profiles is that you only see the data that you actually use working in Captia Web Client. This, however, is not an efficient way of working in WorkZone Configuration Management.

change your profile

You can find your profile in section 1 in Captia Web Client by selecting **Functions** > **Select profile**. Section 1 is always visible on the **Front page** and your can change your profile instantly.

Change your profile in Captia Web Client

1. Open Captia Web Client.
2. In section 1, click **Functions** > **Select profile**. A dialog box opens with a list of profiles.
3. Click the profile named **Standard No profile limitation**. The dialog box closes. You have chosen to work without the restrictions of a profile.

For more information on profiles, see [Preference Profiles.]

Language mode

You can choose to employ either **multi language mode** or **single language mode** in your installation. The choice depends on how many language groups (that is English speaking and/or Danish speaking employees) your organization needs to accommodate.

Single language mode

If your organization is multinational, you can either choose **single language mode**, for example English as the only language, or choose **multi language mode**, for example Danish as the default language but each employee has the option to switch to another language in the clients (WorkZone Client or Captia Web Client).

Multi language mode

In **multi language mode**, the user interface will reflect the selected language and, for example, labels, drop-down lists, and classification scheme will be displayed in that language.

change the language mode

You can switch between **multi language mode** or **single language mode**. See Select user interface language.

change current language in WorkZone Configuration Management

You can set the default language of WorkZone Configuration Management's user interface. See Select user interface language.

change the default language of the Clients

Here you decide which language should be the default language (i.e. group language) of WorkZone Client and Captia Web Client.

If the language mode is set to **multi language mode**, the user is able to override the default language by selecting another language. See Configure group Language.

See also Configure date pattern.

Important notes on usage

Before you begin working with WorkZone Configuration Management, it is important to note the following

Not all information can be deleted

All information *cannot be deleted!*. If it is possible to delete information, the module contains a **Delete** button. However, some types of information may only be *terminated*, for example, an end date that will become inactive in the client user interface.

Example of deletion, see Delete a country.

Example of termination, see Terminate domain type.

Example of deletion and termination, see Delete/terminate a label.

Some changes only take effect after a service has been reset

Some changes only take effect after a service has been reset.

Example, see Using custom domain/label.

Example, see About register security.

Example, see Configure warnings.

The resetting may be a scheduled task that is performed at regular intervals, however it can be done manually.

Logon to another database

WorkZone Configuration Management logs on to one specific database by default. When you install WorkZone Configuration Management, the default database of the URL from which you initiated the installation is shown. The default database is automatically opened when you start. However, you can log on to another database than the default database.

Be aware that the **Logon** dialog box is sensitive to whether the site is http or https.

Log on to another database

1. Click **Database** > **Logon**.
2. Enter the path of the database in the **Database location** field. Enter path: `<https://><host>`

   You only need to enter `<https://>` if it is https. Http is standard and can be omitted.
3. Click **OK**. The new default database is opened.

> **Tip:**
>
> If you want to log on to another database but the default database from the beginning, you can press the Esc key right after clicking WorkZone Configuration Management in the Windows **Start** menu, which opens the **Logon** dialog box.

Working with the user interface

This section describes how to use WorkZone Configuration Management.

About the user interface

The WorkZone Configuration Management user interface consists the following parts:

Interface	Description
Menu bar	Use the menu bar to find the module you want to work with.
Toolbar	The toolbar contains buttons for different functionality, for example, **Delete Row** and **Text Cell Editor**.
Display panel	When you log on to WorkZone Configuration Management, the window is empty. When you open a module from the menu bar, the panels of the module are displayed, for example **Categories** > **Dictionary**.
Status bar	The status bar displays messages, for example server name, the data, and so on.

Menu bar

The menu bar contains the following general items:

Menu item	Description
File	For example, import and export data.
Edit	For example, copy and paste functions.

Menu item	Description
Database	Log on to a database (change database), refresh, and save.

The menu items below gives access to the different modules of the program:

Menu item	Description
Basic data	For example, Countries and Postcodes, Custom Label and Custom Domain.
Categories	Modules containing data for classification cases and documents according to the subject they are covering.
Security	The Use log and the Table security modules.
Diagnostics	For example tools for diagnosing errors.
Operation	Tools for general configuration of Captia Web Client.
Options	Tools for configuring WorkZone Configuration Management.

In the following, when directions are given in procedures, actions in the **Functions** menu are referred to in the following way:

The **Function bar** is the topmost menu bar. It contains the following items:

- Click **Basic Data** > **Stopwords** (refers to the Function bar's entry to the module Basic Data where you are prompted to activate the submenu entry for the Stopwords function)
- Click **Database** > **Save** (refers to the Function menu's entry to the function Database where you are prompted to activate the submenu entry Save - it saves your recent action in you current module in the database).

Toolbar

The toolbar contains the following buttons:

Button	Description
	**Refresh -** Ctrl+R - reloads the data displayed in the panel.
	**Save** - Ctrl+S - saves data in the database.
	**Export to Excel** - exports data to Excel.

Button	Description
	Cut - Ctrl+X - cuts out selected data.
	Copy - Ctrl+C - copies selected data.
	Paste - Ctrl+V - pastes selected data into the current position.
	Delete Row - Ctrl+D - removes the current row.
	Find - Ctrl+F - opens the Find window, where you can search based on the criteria entered.
	Text Cell Editor - Ctrl+T - opens an **Edit** window. This is useful when a cell contains large amounts of data.
	Online help for WorkZone Configuration Management.

Display panel

The display panel is the central part of WorkZone Configuration Management. It is displayed when you open WorkZone Configuration Management. From the display panel, you can open the modules from the menubar. One or more panels display the data registered in the modules. The design of the panels depends on the type of data displayed.

Panel	Description
Hierarchy panel	Data is shown in a hierarchy. Left of each main heading is a button with a plus, indicating that the branch can be expanded. As an example, panel 1 in the module **Classification Scheme** is designed as a hierarchy.
Spreadsheet panel	The most common panel is the spreadsheet. It very much looks and feels like a spreadsheet. For example, the **Dictionary** module is one large spreadsheet.
Detail panel	The detail pane contains a number of data fields. For example, the **Owner Setting** tab in the **Owner** module is a detail panel.
Tab panel	The tab panel might be a collection of spreadsheets. Each spreadsheet on its own tab. When you click a tab, the spreadsheet is displayed.

Panel	Description
	For example, panel 2 in the module **Preference Profiles** is a tab panel. Data is shown as a hierarchy on each tab.

Status bar

<Message>	<Server name>	<Database name>	Ins	Del	5	1

The status bar is displayed at the bottom of the interface. It contains the following information:

- **<Message>** - A message informing about the current activity is displayed, for example "Saving data...".
- **<Server name>** - The name of the server.
- **<Database name>** - The name of the database.
- **Ins** Insert - It is possible to create items.
- **Del** Delete - It is possible to delete the items.
- **5** - The first number tells you in which row the cursor is placed in a spreadsheet panel.
- **1** - The second number tells you in which column the cursor is placed in a spreadsheet panel.

Shortcut keys

Key(s)	Description
Arrow Down	Moves the cursor to the cell below.
Arrow Left	Moves the cursor to the previous cell.
Arrow Right	Moves the cursor to the next cell.
Arrow up	Moves the cursor to the cell above.
Home	Moves the cursor to the first cell in the current row.
End	Moves the cursor to the last cell in the current row.
Page Down	Moves the cursor one page down. The cursor remains in the same column.
Page Up	Moves the cursor one page up. The cursor remains in the same column.
Tab	Moves the cursor to the next cell.

Key(s)	Description
Shift+Tab	Moves the cursor to the previous cell.
Ctrl+Tab	Moves focus from one window to the next.
Ctrl+Shift+Tab	Moves focus from one window to the previous window.
Ctrl+Arrow	Moves the cursor to the cell furthest away in the arrow's direction.
Ctrl+Home	Moves the cursor to the first cell in the window.
Ctrl+End	Moves the cursor to the cell furthest away in the window.
Ctrl+Page Down/Up	Same as Page Down or Page Up.
Ctrl+C	- Copies the highlighted area.
Ctrl+D	- Deletes the row where the cursor is placed.
Ctrl+F	- Opens the window **Find** (search).
Ctrl+R	- Restores the content of the module.
Ctrl+S	- Saves your data.
Ctrl+T	- Edit current cell in Text Cell Editor. Click in the cell you want to edit, press F2 and then Ctrl+T.
Ctrl+V	- Paste the copied item into the cell where the cursor is placed.
Ctrl+X	- Cut the highlighted area.
F2	Edit current cell (opens cell for typing new data).
F4	Opens the drop-down box.
Alt+Arrow Up/Down	Opens / closes the drop-down box.
Space	Removes current value in a drop-down box field cell, and shows the drop-down box button.
Enter	Moves the cursor to the cell below.
ESC	Undoes changes in a drop-down box field or a date field, and inserts the original value.
Backspace	Deletes the character in front of the cursor.
Delete	Deletes one character after the cursor, the row or current item.
Ctrl+0	Clears current field.

About cells and fields

Cells with date fields

When entering a date into a date field, you have two options. Either click the drop-down list button and pick a date in the calendar or enter the date directly into the field. Default dates are displayed as day- month- year, for example 24-12-2013.

Date fields - examples

Date fields are for example **Start date** and **End date,** which are found in the Classification Scheme module, the Custom Label module, and the Custom Domain module.

Navigating the field

The date field is divided into three parts: day, month and year - DD-MM-YYYY.

Use the Right arrow key ➔ and the Left arrow key ← to navigate the three parts of the field.

enter the date directly into the field

1. Click the cell to select it.
2. Click the cell once more to activate it. The date field is ready for input with a drop-down list button displayed to the right.
3. Enter two digits for day and press the right arrow key
4. Enter two digits for month and press the right arrow key
5. Enter four digits for year.
6. Place the cursor in another cell and click **Database** > **Save**.

insert a date from the calendar

1. Click the cell to select it.
2. Click the cell once more to activate it.
3. Click drop-down list button and select a date from the calendar.
4. Click **Database** > **Save**.

Remove a date – empty the date field

1. Click the cell to select it.
2. Click the cell once more to activate it.
3. Press the **Delete** key and then press the **Tab** key. The date field is cleared and the cursor moves to the next cell.
4. Click **Database** > **Save**.

Cells with drop-down lists

When entering a value into a drop-down box, you must select a value from the list. An example is **Sub-number type** field in the Classification Scheme.

use a drop-down list

1. Click the cell select it.
2. Click the cell once more to activate the drop-down list.
3. Enter the first characters of the value you want to insert. Values containing the characters entered are displayed. Select a value from the list.

   - Or -

Clik the drop-down list. Browse through the list using up and down arrow keys, or type the first characters of the value you want to insert. Select the relevant value.

4. Place the cursor in another cell (otherwise you cannot save) and click **Database** > **Save**.

operate the drop-down list using shortcut keys

1. Press **ALT+ARROW DOWN** to open the drop-down box.
2. Enter the first characters of a value. A drop-down list is opened on top of the first one. It displays the values containing the characters entered.
3. Use the **ARROW DOWN** to select a value and either use the **TAB** key to insert the value in the cell (the cursor jumps to the next cell.) or use the **RETURN** key to empty the field (the cursor stays in the cell).

Edit a cell

Some cells contain large quantities of text. The **Text Cell Editor** allows you to have text displayed in an editor. Here you can make the necessary changes and save the text in the original cell.

edit a cell

1. Click in the cell you want to edit.
2. Click once more to activate it.
3. Click the **Text Cell Editor** button in the toolbar. The contents of the cell is displayed in an editing window.
4. Click **OK** when you have finished editing. The window is closed and the contents of the cell has been updated - indicated by the pencil icon displayed in the left

most cell.

5. Click **Database** > **Save** to save the changes.

Functions

Resize columns and rows

You can adjust the width of the columns and the height of the rows by pulling the divider ↔ to resize column with or the divider ↕ to resize row height.

You can also use the context menu if, for example, there is not space enough to pull the column wider. Some modules have so many columns in the panel that it is impossible to pull for more space.

use the context menu

1. Right click the header of a column and click **Increase Column Width** or **Decrease Column Width**
2. Click **Increase Column Width** to increase the column width.
3. Use the scroll bar below to view the column.

Sorting

You can sort the contents of the panels. Click the header of the column you want to use for sorting the list. The list is automatically sorted.

Primary or Secondary Sorting

You can sort up to three columns. Each time you click on a column header, it becomes the primary sorting criteria, while a previously sorted column becomes the secondary sorting criteria.

Find

Use **Find** when you need to search for a particular item, for example post code or a user.

You must open the module, which you want to search within, before you click **Find**.

Find

Example: You want to find the user "Trine Troelssen" in the **User** module.

1. Click **Operation** > **Users**.
2. Select the first cell of the relevant column.
3. Click .
4. In the **Find what** field, enter your search criteria, in this example `troels`.
5. Select where to search in the **Look in** field is by default set to **All columns**.

   To narrow down the search to one particular column, click the drop-down list and select the specific column from the list.
6. Select the check boxes under **Find options**.
7. The first item found is highlighted.

Fields in the Find window

Field	Description
Find what	Enter the search criteria here. Click the drop-down list to view the last 10 entries.
Look in	Select the scope of the search • **All columns** - this is the default setting. • A specific column. Click the drop-down list to select a particular column.
Find options	In this section there are three check boxes:

Field	Description
	• **Match case** - executes a case sensitive search. • **Match whole column** - matches the search criteria exactly - except for case. • **Search up** - searches in ascending order - the default value is descending order.

Gridview

The purpose of the **Gridview** is to display large quantities of rows of items faster. With **Gridview** the contents of a list is displayed in batches, in stead of one long list.

For example, there are approximately 1300 Danish post codes. With **Gridview** it is possible to have them loaded and displayed in batches of, for example, 200.

A search in the **Use Log** as another example, easily retrieves a large amount of data. It may take a while to load all data into the display panel. To avoid long response times, you can use **Gridview**. When you have looked at one batch of data, you can navigate through the remaining batches using the navigation buttons, for example **Move next**.

Operate the Gridview

The default number of records in the gridview is 2000. If, for example, you are viewing a list of Danish post codes, it will (if it exceeds 2000) show a status bar at the bottom of the list. This bar shows the result in batches of 2000 post codes at a time, for example, **2001 - 4000 of 5058.**

Now, you have to click the **Move next** button to load the next batch of 2000. You can always navigate the total series of batches by use of the buttons shown below.

 **Move first** - Moves to the first batch of data.

 **Move previous** - Moves to the previous batch of data.

 **Move next** - Moves to the next batch of data.

 **Move last**- Moves to the last batch of data.

Adjust the Gridview

Click **Options** > **Gridviews** to set the amount of data per batch. By default, the gridview is set to display 2000 items. For better performance, you can adjust the number to, for example, 200 items.

The grid view is by default set to 2000. In the **Number of records in gridview** field in the **GridViewOption** dialog box, the default value is entered as 2000__ , that is two thousand succeeded by two underscore characters, in all 6 characters.

The field must always contain 6 characters. If you, for example, want to set the number to 350, you must enter it as 350___ , that is three hundred and fifty followed by three underscore characters.

1. Click **Options** > **Gridviews**.
2. In the **Number of records in gridview** field, enter a new value, for example 350, it must be entered as `350___`.
3. Clik **OK**.

Basic data

The Countries and Postcodes Modules

In the **Countries and Postcodes** module you can manage countries and cities with post codes.

In order to use a country or postcode in the WorkZone Client or Captia Web Client, you must first enter it in the **Countries and Postcodes** module. Country and postcode are used for example on contact detail pages.

To access the **Countries and Postcodes** module, you need the access code **DATAADM**.

Click **Basic Data** > **Countries and Postcodes** to open the module.

Manage countries

About countries

Before WorkZone users can use countries and postcodes, for example when creating new contacts, you must create them in the **Countries and Post codes** module.

Click **Basic Data** > **Countries and Postcodes** to display the countries.

Create a country

You can create a new country in the **Countries** module.

You must create the country before you can create postcodes associated with a country.

Create a new country

1. Click **Basic Data** > **Countries and Postcodes.**
2. Click in the empty bottom cell of the column **Country**.
3. Click the cell once more to be able to enter a country code.
4. Enter the country code in the cell, for instance, **N** for Norway.
5. Click the next cell - in the **Name** column.

   Enter the name of the country.

6. Click the cell once more to be able to enter a country code.
7. Click **Database** > **Save**.
8. The panel **Country names for <country>** is displayed bottom left.

   The name of the country is inserted in all rows.

9. Click the names you want to edit one by one, and make your changes.

   Place the cursor in another cell and click **Database** > **Save**.

Edit a country

You can edit all information concerning a country except the cell **Country**. The content of this cell is the unique ID of the country. As soon as the newly created country has been saved, the cell is locked for editing.

1. Click **Basic Data** > **Countries and Postcodes**.
2. Click the cell of the country you want to edit.
3. Make the necessary changes.
4. Place the cursor in another cell and click **Database** > **Save**.

Delete a country

If you have created and saved a country with a wrong code, you have to delete the country. You cannot edit the cell in the column **Country** once you have saved the country.

You cannot delete a country if it has been used or if you have created postcodes belonging to that country. If this is the case, then you must delete the post codes one by one before deleting the country.

1. Click **Basic Data** > **Countries and Postcodes**.
2. Click the cell in the column to the left of the country you want to delete.
3. Click once more in the cell to select the row of the country to be deleted.
4. Click  to delete the country.
5. Click **Database** > **Save**.

Country meta data

The data you can register describing a country is shown below.

Data	Description
Country	This cell contains a code, for instance, the international vehicle registration code. E.g. `NO` for Norway. The contents of this cell is the unique ID of the country. As soon as the data has been saved, the field is locked for editing.

Name	The name of the country, for example, Canada.
	In the bottom left panel you can maintain the culture specific names of the country.
	`da-DK - Denmark`
	`fr-CA - Canada`

To create new entries, follow the general instructions in Working with the user interface.

See also Post codes metadata.

Metadata

The data you can register describing a country is shown below.

Data	Description
Country	This cell contains a code, for instance, the international vehicle registration code. E.g. `NO` for Norway. The contents of this cell is the unique ID of the country. As soon as the data has been saved, the field is locked for editing.

Name	The name of the country,for example, Norway.
	In the bottom left panel you can maintain the culture specific names of the country.
	`da-DK - Norge`
	`en-GB - Norway`

To create new entries, follow the general directions of use in Use - contents.

See also Post codes - metadata.

Manage postcodes

About postcodes

To create a postcode, the country of the postcode must exist. By default a large number of countries already exists when WorkZone Configuration Management is installed.

In the **Countries and Postcodes** module, you can create, edit and delete postcodes of countries.

1. Click **Basic Data** > **Countries and Postcodes**.
2. Click on the field to the left of the country code of that country to see the postcodes of a specific country. The postcodes are displayed in a separate panel to the right.

Create a postcode

To create a post code, the country to which the code belongs must exist in the module.

You want to create the post code `2150, Nordhavn` in Denmark.

1. Click **Basic Data** > **Countries and Postcodes**.
2. Select the country to which the post code belongs in the list of countries (`Denmark`).
3. Click the cell in the column to the left of the country code.

   A panel displaying the postcodes of that country is displayed to the right.
4. Place the cursor in the empty cell of the **Post code** column's bottom row.
5. Click the cell once more to enter the postcode, for example `2150`.
6. Click the next cell of column **District**.
7. Enter the name of the district for e.g. `Nordhavn`.
8. Click **Database** > **Save**.

Edit a postcode

You can edit all information concerning a postcode except the cell **Postcode**. The content of this cell is the unique ID of the postcode. As soon as the newly created post code has been saved, the cell is locked for editing.

1. Click **Basic Data** > **Countries and Postcodes**.
2. Select the country to which the postcode belongs in the list of countries.
3. Click the cell in the column to the left of the country code.

   A panel displaying the post codes of that country is displayed to the right.
4. Click the cell of the postcode you want to edit and make your changes.
5. Place the cursor in another cell and click **Database** > **Save**.
6.

Delete a postcode

You can delete a postcode as long as it has not been used in Captia Web Client. If it has been used with a contact or address in Captia Web Client its entries it cannot be deleted unless all its instances are deleted or changed in the Captia Web Client user interface.

1. Click **Basic Data** > **Countries and Postcodes**.
2. Select the country to which the post code belongs in the list of countries.
3. Click the cell in the column to the left of the country code.

   A panel displaying the post codes of that country is displayed to the right.
4. Click the cell in the column to the left of the postcode.

   The row is highlighted.
5. Click  to delete the postcode.
6. Click **Database** > **Save**.

Postcode meta data

The data you can register describing a postcode is shown below.

Data	Description
Postcode	The contents of this cell is the unique ID of the postcodes, for instance, `2150` (Nordhavn in Denmark). As soon as you have saved the postcode, this cell is locked for editing.
District	The name of the post district, for instance `Nordhavn` (postcode 2150).

To create new entries, see Working with the user interface.

Metadata

The data you can register describing a postcode is shown below.

Data	Description
Postcode	The contents of this cell is the unique ID of the postcodes, for instance, `7884` (Sørli in Norway). As soon as you have saved the postcode, this cell is locked for editing.
District	The name of the post district, for instance `Sørli` (postcode 7884).

To create new entries, follow the general directions of use - see Use - contents.

Related topic - see Countries - metadata.

The Custom label Module

The **Custom label** module manages both system defined and custom defined **Label Types** and **Labels**. A **Label type** contains labels. A label either defines the content of a data field or labels references, that is roles, in WorkZone Client and Captia Web Client.

To access the **Custom label** module, you need the access code **DATAADM.**

Click **Basic Data** > **Custom label** to open the module.

About custom labels

In the **Custom label** module you can maintain custom labels. A label is the name of a field that describes the information that field contains.

WorkZone Client and Captia Web Client contain two different types of labels:

- Fixed labels

  The pages and dialog boxes of WorkZone Client and Captia Web Client contain a number of fixed labels. They are part of the default configuration of and cannot be changed by the users. An example of a label is the text **Case handler** on the case details page.

- Custom labels

  These labels are user defined. They are available for registering information, for example, on the case details page in the bottom section of the page, click

More... > Information.

The purpose of the custom label

The purpose of custom labels is that you can name labels yourself. For example, fields for registering degrees of longitude and latitude are not default in the clients but can be added by means of custom labels. Subsequently the WorkZone Client and Captia Web Client user can register this type of information and search for cases on the basis of it.

Where are custom labels used

Custom labels are used in WorkZone Client and Captia Web Client details and search pages for cases, documents, and contacts.

About custom label types

Custom labels are grouped according to label types depending on register and data type. A label type is identified by a code, that is its ID. The code consists of two characters defining the register they belong to and their function:

- The first character of the code defines which **register** the label belongs to:
  - **A** = **Documents**
  - **N** = **Contacts**
  - **S** = **Cases**
- The second character defines the **data type** to be registered with the custom label:
  - **A** = **Documents** (only applied in AA)
  - **D** = **Dates**
  - **H** = **References**
  - **O** = **Information**
  - **P** = **Contacts**

As an example the label type **SH** consequently denotes the reference Case references - references between cases.

Label types for which you can create your own custom labels

Below are the label types you can use for creating your own custom labels:

Label type	Description	Name in WorkZone Client/Captia Web Client
AA	References between one document and another. The label characterizes the role of the actual reference. One custom label could, for example, be **Copy** and the reverse label, **Original document**.	**Document references**
AD	Custom labels for special document dates. A custom label could, for example, be **Aground**. In the data field you must enter the date when the ship in question ran aground.	**Document dates**
AH	References from the current document to cases of relevance for the document at hand. The label, for instance, defines the role of referenced case, such as **Cross reference**.	**Case references**
AO	Custom labels for document information not included in the default meta data fields such as **Agenda**.	**Information**
AP	Custom labels for contacts reference by documents defining the role of the contact such as **Sender**.	**Parties**
ND	Custom labels for special dates to be registered on contacts such as **Hired from**.	**Dates**
NH	Custom labels for referencing contact case relations such as **Member**.	**Case references**
NO	Custom labels for **contact information** not included in the default	**Information**

Label type	Description	Name in WorkZone Client/Captia Web Client
	metadata fields such as **Marital status**.	
NP	Custom labels for referencing contacts in relation to another contact. The contacts attached to another contact in this way are automatically committee members. And the contact to which they are attached is the committee. The label defines the role of the members, for example, **Chairman, Secretary, Member,** etc.	**Contact references**
SD	Custom labels for special dates registered on cases.	**Case dates**
SH	Custom labels for cases attached to another case for reference. The label is used for describing the role played by the case referred to, such as **Associated case**.	**Case references**
SO	Custom labels for case information not included in the default meta data fields. These custom labels could, for instance, be user for non default information like **Degree of longitude** and **Degree of latitude**.	**Information**
SP	Custom labels for contacts reference by cases defining the role of the contact such as **Party**.	**Parties**

For an in depth description of the functions of the data fields **Dates**, **References**, **Information** and **Contacts**, see Types and data fields.

About custom label types and data fields

Custom labels are grouped according to the type of data to be registered with the label in question:

- D = **Dates**
- H = **References**

- **O** = **Information**
- **P** = **Contacts**

In WorkZone Client and Captia Web Client you can register data in the data fields that belongs to the custom labels. In the table below the controls of the different type of labels are described.

Custom label	Properties of the data fields
Dates	The field only accepts a correct date. Dates in WorkZone Client and Captia Web Client can be entered in different ways: • By selecting a date in the calendar. • As an algorithm, for example +4w, which automatically converts into the date 4 weeks ahead. • Directly as a date, which consists of at least 6 digits - ddmmyy, for example, 241212 displayed as 24-12-2012.
References	To register references, you have to select the entities in a dialog box. When you start registering an entity in a data field, belonging to this type of label, a dialog box is opened. Here you must search out one or more entities to be referred to. Only entities already existing in the database can be referred to.
Information	The field may have one of two modes that determines the use of the field in WorkZone Client or Captia Web Client: • A free text field where the user can enter any text or number into the text box. • A drop-down box with a controlled choice of possible entries. The values listed in the drop-down box depends on the selected **Routine**, (i.e. dependency) for the custom label.
Contacts (in Captia	There is no actual input field associated with custom labels of this type. These custom labels describe the connection between the contact and the entity to which it is attached.

Custom label	Properties of the data fields
Web Client called Parties)	When you, for example, link a contact to a case, you can specify the role of the contact in relation to the case. The custom label, used to characterize this relation, could for example be **Complainant**, **Accused**, and so on.

Custom label meta data

Table below displays the meta data you can register concerning **Label types** and **Labels**.

Column	Description
Panel: **All Label type**	The first left panel contains all custom label types.
Label type	The **Label type** is composed of two letters, for example, **SO**. This label type contains labels for supplementary case information. See also Custom label types.
Label text	The **Label Text** contains a description of the subject of the label type.
Panel: **Label: <label type>**	The upper right panel contains the **Labels** of the **Label type**.
Label	In this cell you must enter the label which is displayed for the users in the WorkZone Client or Captia Web Client user interface.
Reverse label code	This cell is only used with system defined label types **AH** and **SH** and the routine **Cross reference**. It is used for cross references, where the source and the target reference need different tags, such as **Copy** vs.Original or Parent As an example, the users can move an archived document from one case to another. Cross reference information is automatically inserted into both source and target. In this way the document can be traced back to its original location and to its new location.

Column	Description
System	In this cell, you can enter the name of the owner of the label - if necessary.
Routine	In this cell, you can enter the name of the routine that implements dependency between the label's data field and the validating custom domain. By default, you can attach validation routines to three types of labels: **AO,** i.e., document information, **NO,** i.e., contact information and **SO,** i.e., case information. Otherwise it must be a customized label type, see Create custom label type. The system offers a number of different ways to configure the data field attached to the labels. For instance, you could have: • Data fields without validation - a free text box (no Routine is selected). • Data fields that are validated against a user defined domain in the **Custom Domain** module (Routine is selected). • Data fields that are validated against fixed (i.e. mandatory system) domains in the **Custom Domain** module, such as employees, contact types, countries, etc.
Text	Enter an elaborated description of the label.
Start date	The date defines the day of initiation.
End date	The date defines the day of termination.
Localized label	What you enter here, is what the users of Captia Web Client see in the user interface. It is important that the label is short and precise. If you system is running in **multi- language mode** you must also enter the culture specific localized labels in the lower right panel. For information on language mode, see Language mode.
Panel: **Label value: <label>**	The lower right panel contains the **Label values** of the selected **Label** in the upper right panel - if multi-language mode is selected, the related cultures (i.e. languages) are shown.
Localized	What you enter here, is what the users of Captia Web Client see in the user inter-

Column	Description
label	face, depending on the culture they have selected. It is important that the label is short and precise.
Text	Here you can enter an elaborated description of the label.
Culture	The culture code of the current row.
Source	The current language code (i.e. default language).

Create custom label types

It is possible to create new label types in case of customizations. A label type is a domain. Here you can create labels for customized fields displayed in WorkZone Client or Captia Web Client. This could, for example, be fields for dates with labels supporting the work process of the organization.

create a new Label type

1. Click **Basic Data** > **Custom Label**.
2. Click in the cell to the left of label type **TY**, **Label types**.
3. In the upper right panel, click in the empty cell in the **Label** column.
4. Enter a short and precise name for the label type - max. 11 characters. This name is the ID of the new label type.
5. Click the column **Text** in the in the next cell. Click in the cell once more to enter the specific descriptions of the label - for example, the same as the Label.
6. In **Localized Label** cell enter the user interface name.
7. Whether the **Routine** cell is filled in, depends on the use of the Label type.
8. You should enter an initiation date in the column **Start date**.
9. Place the cursor in another cell and click **Database** > **Save**.

If your system is running in multi-language mode, you must also add the culture specific texts in the lower right panel.

See also

Configure the label type, see Routine.

Create custom label with validation, see Create custom label with validation.

Create custom label without validation, see Create custom label.

Create custom labels

You can create new labels for existing domains, i.e., label types.

Example

When you register cases in Captia Web Client concerning grounded ships, you must register some supplementary information. You must register the date the ship was grounded and the date it was brought afloat again.

These dates are not default information in the case details page in WorkZone Client and Captia Web Client. Therefore, you must create two new custom labels, for example, **Grounded** and **Afloat**. They must be created in the label type **SD** domain, i.e., **case dates** and then the labels and their data fields will be available in WorkZone Client or Captia Web Client on the case details page. In Captia Web Client,Click **More** > **Dates**.

Create labels

1. Click **Basic Data** > **Custom Label**.
2. Click the cell to the left of the **Label type** in which you want to create labels, in this example **SD**. The contents of the Label type is displayed in the upper right panel.
3. Click the empty cell in the bottom of the **Label** column.
4. Click once more and enter a short and precise name for the label - max. 11 characters. In this example **Grounded**. This is the ID of the new label.

   A custom label must not be prefixed with a number.

5. In the **Text** cell, enter the text defining its use, for example **The date of the grounding**.

6. In **Localized Label** cell, enter the label used in the WorkZone Client or Captia Web Client user interface.
7. Ignore **Routine** (unless it is called for due to a customization).
8. You should enter an initiation date in the column **Start date**.
9. Repeat the steps 3 through 8 until you have created all the necessary labels.
10. Click **Database** > **Save**.

If your system is running under the multi language mode, you must also add the culture specific localized labels and texts in the lower right panel.

Create custom label with validation

You can create labels which have either a specific control or no control at all. A control governs what users in WorkZone Client and Captia Web Client can enter into the data field belonging to a certain label. Controls can only be attached to labels of label types **AO**, **NO** or **SO**, unless they have been created as part of a customization - see Create custom label types.

You can create labels with a drop-down box in the data field belonging to the label. The values contained in the drop-down box belong to a domain in the custom domain module. Both fixed (i.e. mandatory) domains, for example **Case type,** and user defined domains can be attached to the label - the data field of the label.

Example

When you register cases in WorkZone Client and Captia Web Client concerning for example grounded ships, you must register some supplementary information. You must register the cause of the grounding. This is done by supplying the cause. You select the cause from the list of predefined causes in the drop-down box.

The prerequisites for this are:

- You have created a domain for the values i.e. a domain type, see Create custom domain type.
- You have created the values in this domain, see Create custom domain value.

This type of information is not default information in the case details page in WorkZone Client and Captia Web Client. Therefore, you must create a new custom label, for example

Grounding. It must be created in the label type **SO,** "Case information" domain. You must attach a domain type to the data field of the label. This is done in the cell **Routine**. Here you can select the domain type containing the values assigned to the different causes for groundings.

Now the label and the data field with the specific control, will be available in WorkZone Client and Captia Web Client as soon as the **IIS Admin service has been reset** (this usually happens automatically once every 24hrs.) After the resetting, it will, on the premiss of this example, be available on the case details page. The user must select the relevant value from the drop-down box of the data field.

Create a label with validation

1. Click **Basic Data** > **Custom Label**.
2. Click the cell to the left of the **Label type** in which you want to create labels, for example **SO**. The contents of the Label type is displayed in the upper right panel.
3. Click the empty cell in the bottom of the **Label** column.
4. Click once more and enter a short and precise name for the label - max. 11 characters.
   In this example **Grounding**. This is the ID of the new label.
5. In the cell **Text** enter the text defining its use, for example **Grounding causes.**
6. In cell **Localized Label** enter the label used in the WorkZone Client or Captia Web Client user interface.
7. In the cell **Routine** select the custom domain that should control the drop-down box of the label, for example **Grounding causes**.
8. You should enter an initiation date in the column **Start date**.
9. Click **Database** > **Save**.

After the IIS has been reset, the case handler would be able to process a grounded ship and supplying the information regarding the cause.

If your system is running in multi language mode, you must also add the culture specific Localized Labels and texts in the lower right panel.

Validation controls for the data field - see Custom label meta data.

Edit Custom label

You can edit information about label types and custom labels. You can edit information in all cells, except **Label type** and **Label**. The content of these cells is by default locked.

edit the Label Types

1. Click **Basic Data** > **Custom Label**.
2. Click in the cell to the left of label type **TY**, **Label types.**
3. In the upper right panel, click the left cell of the label you want to edit. The bottom right panel now displays the culture specific names of the label.
4. You can edit the cells **Localized Label** and **Text**.
5. When you have made the necessary changes,
6. Place the cursor in another cell and click **Database** > **Save**.

edit labels

1. Click **Basic Data**> **Custom Label**.
2. Click to the left of the **Label type** in which you want to edit labels, for example **SO**.
3. Click in the cell to the left of that label type.
4. In the upper right panel, you can edit all the cells that are not greyed out or click in the lower right panel and edit **Localized Label** and **Text** cells.
5. Make your corrections.
6. Place the cursor in another cell and click **Database** ▸ **Save**

For information about individual cells, see Custom label - metadata.

Delete or terminate a custom label

There are two ways to discontinue a label - you can *terminate* it by applying an end date, or you can *delete* it if there are no occurrences of it in WorkZone Client or Captia Web Client.

terminate a label

1. Click **Basic Data** > **Custom label**.
2. Select the **Label type** of which you want to terminate labels.
3. Click the column to the left of the code of that label type.
4. In the upper left panel, click **End date** of the label to be terminated. Click the cell once more to activate it. Today's date is entered into the cell by default.
5. You now have two options:

- To enter the date manually, edit each part of the date separately.
- Click the drop-down button of the cell to select a date from the calendar.

6. Place the cursor in another cell and click **Database** > **Save**.

To terminate a value immediately, insert yesterday's date.

delete a label that has never been used

1. Click **Basic Data** > **Custom label**.
2. Select the **Label type** of which you want to delete labels.
3. Click the column to the left of the code of that label type.
4. Click to the left most cell of the row of the label you want to delete.
5. Click **Edit** > **Delete Row**.
6. Place the cursor in another cell, click **Database** > **Save**.

The Custom domain Module

In the **Custom domain** module, you manage a collection of domain types. A domain type is an individual register. Each of these registers contains a number of values that are presented in the WorkZone Client or Captia Web Client interface in a drop-down box of the field of the register in question, for example **Case types**.

You can use both system defined domain types and user defined domains types with both fixed and variable contents.

To access to the **Custom domain** module, you need the access code **DATAADM**.

Click **Basic Data** > **Custom domain** to open the module.

About custom domain

About the Custom Domain module

The **Custom domain** module contains a collection of domain types. A domain type is an individual register. Each of these registers contains a number of values.

These registers contain basic data that displays in drop-down lists to data fields, for example, displayed on the details pages in WorkZone Client and Captia Web Client. When you, for example, click the drop-down list of the **Document type** field, the values come from domain type **AT, Rec. type**.

What does the custom domain module contain?

The **Custom domain** module contains a large number of basic data, for example, document types, document groups, case types, and so on.

The **Custom domain** module contains 3 types of domain types:

- System defined domain types, which contain both system and user defined values, for example, case types, document types, and so on.
- System defined domain types owned by the system and managed by KMD.
- User defined domain types with user defined values.

The system defined domain types are mandatory and must exist in the **Custom Domain** module prior to implementation. They contain values for data fields belonging to the WorkZone Client and Captia Web Client details and search pages, and so on.

Some of the system defined domain types are system owned registers that supports special features. Only KMD can edit these custom domains.

What does a custom domain contain?

A domain type is a domain (or register) that contains a number of values, which consists of a code and a text. The text defines what the code means. As an example, the text **Embed. image** defines the code **EMBED** in the domain type **AT, Rec. type** as an embedded image.

System defined domain types with values managed by you, see User managed domain types.

User defined domain types with values managed by you, see About user defined domains.

Custom domain meta data

The data you can register in custom domains is show below.

Column	Description
Panel: **All Domain Types**	The **All Domain Types** panel contains all domain types. All domain types are values in domain type **TY**, **Cust. dom. type**, except the domain type itself. When you have created a new domain type, you have created a domain (a register). In this domain you can create the number of values necessary.
Code	The unique ID of the domain type
Domain Type	The name of the Domain type - a short and precise description of the domain type. **Custom label module** The **Routine** cell of the **Custom label** module contains a drop-down box. The values of this drop-down box are the names registered in this field. If a value is selected here, the data field of the **custom label** in question contains a drop-down box when displayed in WorkZone Client and Captia Web Client. The values displayed in this drop-down box

Column	Description
	come from the custom domain represented by the "routine".
System	The owner of the Domain type If the owner is KMD, only KMD is allowed to edit the domain type, for example, create values in the domain.
Panel: **Domain: <Code> (<Domain type>)**	The upper right panel with the header **Domain: <Code> (<Domain type>)**. The values of the current domain type are displayed in this panel.
Code	The unique ID of the value.
Text	The name of the value.
System	The owner of the value. If the owner is KMD, only KMD is allowed to maintain the value.
Start date	If a date is entered into the cell, the value can be used in WorkZone Client and Captia Web Client as of this date.
End date	If a date is entered into the cell, the value will as of this date no longer be available in WorkZone Client and Captia Web Client.
Panel: **The lower right panel**	The panel is displayed when the program is working in multi-language mode. Here the culture specific names of the values of the domain type are displayed and managed. The culture specific names of the current value are maintained here.

Column	Description
Text	The culture specific name of the value.
Culture	The culture code of language to be used for the text.
Source	The current language code (i.e. default language).

See also dependencies between **Custom Domain**, **Custom Label** and WorkZone Client and Captia Web Client, see Using custom domain/label.

Single and multi-language mode, see Language mode.

Using custom domain/label

Custom domain and label dependency

It is possible to make data entries in the **custom label** module dependant on data from the **custom domain** module displayed in a drop-down lists.

The purpose of this feature is to allow tailor made labels and drop-down list values in WorkZone Client and Captia Web Client. This enables you to implement the data set and labels of your organization, and furthermore to control what data can be registered from within a specific label.

implement a dependency

When you register cases in WorkZone Client or Captia Web Client concerning for example grounded ships, you must register the cause of the grounding. In this example, the organization has a predefined list of so called Grounding codes. Each code describes the type of cause for the ship to run aground.

The organization does not want the case handlers to individually define the causes, but want them to use a predefined list of causes. Therefore, it is necessary to make the predefined list the only option when registering the cause of the grounding, for example on the case details page in WorkZone Client and Captia Web Client.

configure a label with a dependency on values from a custom domain

Follow the process below to configure a label with mandatory data entries from a predefined and controlled drop-down list.

1: Create domain type	1. Open the **Custom Domain** module and create a new domain type, in this example "GC, Grounding cause". 2. Select the domain type **TY,Cust. dom. type**. 3. In this domain, create a value with code **GC** and the text **Grounding cause**. 4. Saved it to the database and it becomes an individual domain type. Now it is displayed in the panel **All Domain Types**.
2: Create values for the domain type	1. In the **Custom Domain** module, select the domain type you just created. The upper right panel is displayed with the header "Domain: GC (Grounding cause)". 2. Create the necessary values for the domain type, for example **CO, Collision, NM, Navigational mistake,** and so on.
3: Create custom label	1. Open the **Custom Label** module and create a label and then dedicate a data field for registering the grounding cause. 2. In the **All Label Types** panel, select label type **SO** for case information. The values, i.e. labels of this label type, are displayed in the upper right panel. 3. Enter the name of the label in the **Label**, **Text** and **Localized Label** cells, in this example "**Grounding**".This is the label which is going to be displayed in WorkZone Client and Captia Web Client.
4: Create the	Now attach a dependency (i.e. routine) to the label.

dependency between the custom domain type and the custom label type	The **Routine** cell displays a drop-down list. Here you must select the domain type of the label, creating a controlled drop-down list. In this example, you must selecte "**Grounding cause**". The IIS Admin service must be reset before the dependencies take fully effect in the user interface.
5: Custom domain and label in Captia Web Client	A ship running aground is to be registered in Captia Web Client. The Captia Web Client user logs on and creates a new case registering the grounding. To register the cause of grounding, the user must select the cause and supply it as case information in section 4: 1. Open the list "Information" using the menu item **More...** > **Information**. 2. Open a new information entry by clicking **Functions** > **Add to list**. 3. Open the drop-down list "**Custom label for free case information**" and select the relevant label , in this example "**Grounding**". 4. Open the drop-down list of the "**Information**" field and select the relevant value - in this example **CO, Collision**. 5. Save the information.

Resetting of the IIS Admin service

When dependencies have been created, the IIS Admin Service must to be reset before your changes take effect and can be employed fully in the WorkZone Client and Captia Web Client user interface.

User defined domains

About user defined domains

The purpose of user defined domains is that you can create a domain yourself and define the contents of that domain. This content is accessible in a drop-down lists in WorkZone Client and Captia Web Client.

To have the contents of the user defined domain displayed in a drop-down list, you must:

1. Create a label in the **Custom label** module.
2. Attach your custom domain to the label as a "routine".

Example

As an example, you have a list of codes to be used in WorkZone Client or Captia Web Client to specify types of reasons for ships running aground. When the users register a code on a case, they must select the code from a predefined list.

In the example there is no list of codes beforehand and there is no dedicated field on the case details page for the codes.

This is how to implement it:

1. Create the list as a domain type in the **Custom domain** module, see Create a domain type.
2. Register all the codes in the new domain, see Create values in a custom domain.
3. Create a label in the **Custom label** module with a data field validated against the registered codes - see Create label with validation.

For information on the dependency between Custom Label, Custom Domain and WorkZone Client and Captia Web Client, see Using custom domain/label.

Create domain type

You can create a new domain. You create a domain by creating a domain type. In the new domain you can create values.

Example

As an example, you must register ships grounded within 12 nautical miles from the coast as cases in WorkZone Client or Captia Web Client. In connection with these cases, you must register a code defining the reason why the ships ran aground. Your organization has a list of codes describing the different types of conditions causing groundings. You must create this list in the database, i.e., in the **Custom domain** module.

Create a custom domain

1. Click **Basic Data** > **Custom Domain**.
2. Click in the cell to the left of domain type **TY**, **Cust.**.
3. In the upper right panel, click the empty cell in the bottom of the **Code** column.
4. Enter a unique identification code for the new domain type. Maximum 8 letters - in this example "GC".
5. Click the **Text** column in the next column.
6. Click in the cell once more to enter the specific descriptions of the domain. In this example **Grounding cause** in the **Text** cell.
7. Enter an initiation date in the **Start date** column .
8. Place the cursor in another cell and click **Database** > **Save**.

If your system is running in multi-language mode, you must also add the culture specific texts in the lower right panel.

When you have created a new domain, the next steps are:

- Create the values of the domain - see Create values.
- Create a label, for example, "**Grounding**" in the **Custom Label** module - see Create custom label with validation.
- Attach the custom domain **GC**, **Grounding Cause** to the label as a "routine". The data field of the custom label will be validated according to the values of the custom domain **GC**.

Now the users can register the proper codes describing the reasons for grounding.

Edit domain type

You can edit the following cells of an existing domain type:

- Start date
- End date
- Text

edit a domain type

1. Click **Basic Data** >**Custom Domain**.
2. Click in the column to the left of **TY**, **Cust. dom. type**. (All Domain Types are shown in the upper right panel.)
3. Click in the **date cells** of the domain type to be edited and in the lower right panel, click to edit **Text** cells.
4. Edit the data of the cell.
5. Place the cursor in another cell and click **Database** > **Save**.

Terminate domain type

You can terminate domains which are no longer in use. When entering an **End Date** in a domain, the following happens in WorkZone Client and Captia Web Client:

- Values no longer in use remain in place where they were originally used, for instance values on cases. If you, for example, terminate the custom domain **GC, Grounding causes**, the values of that domain remain where they were registered in WorkZone Client or Captia Web Client.
- The values of the domain will no longer be available in the drop-down list of the field to which they originally belonged. However, they will still be available in search pages in the WorkZone Client and Captia Web Client user interfaces.

terminate a custom domain

1. Click **Basic Data** > **Custom Domain**.
2. Click the column to the left of the domain type, **TY**, **Cust. dom. type**.
3. Click the **End date** of the Domain Type you want to terminate.
4. Click the cell of **End date** once more to activate the drop-down list.
5. Click the date you want to insert as **End Date**.
6. Place the cursor in another cell and click **Database** > **Save**. You now have terminated the domain type.

To terminate a domain immediately, insert yesterday's date as the end date.

Fixed domains

User managed domains

The table below displays a lists of some of the common predefined domain types. In these domains you can create, edit and terminate your own values. Create the values preferred by your organization, for instance, values for different types of documents or cases in **AT, Rec type**, **ST, Case type**.

The values you create here are displayed in WorkZone Client and Captia Web Client. When you, for example, open the drop-down list of the **Case type** field, the values displayed are the ones you created in the **Custom Domain** module.

Domain type	Code	Description
Address type	**AD**	Values registered in the **Address type** domain could be: • HA, Main address, • FI, Branch address. Use in Captia Web Client These values are used for defining which address of a contact is the primary address and which are the secondary addresses. The values registered in the **Address type** domain are dis-

Domain type	Code	Description
		played in the drop-down list named **Type** in the address details view - section 5 in the contact details page.
Rec. group	**AG**	Values registered in the **Record group** domain could be: • AFT, Agreement • HM, Enquiry request • HS, Response • IN, Recommend. Use in Captia Web Client The values could, for instance, be used for grouping documents according to contents. The values in the domain **Rec. group** are displayed in a drop-down box in the field **Document group,** e.g. in the document details page.
Rec. type	**AT**	Values registered in **Record type** domain could be: • IL, Incoming letter • IM, Incoming mail • IF, Incoming fax • TN, Telephone note Use in Captia Web Client The values are intended to show whether an item is an incoming or outgoing document or mail, an internal document, etc. The values in the domain **Rec. type** are displayed in a drop-down box in the field **Document type,** for example on the document details page.
Remind. type	**ET**	Values registered in the domain **Reminder type case** could be: • SU, Suspended • RS, Restarted

Domain type	Code	Description
		• SH, Shelved • UR, Urgent **Use in Captia Web Client** The values are used for characterizing the purpose of a case reminder. The values in the domain **Reminder type** case are displayed in a drop-down box in the field **Reminder type** e.g. in the case details page - section 4 in the list named Reminders.
Reminder type rec.	**ETAKT**	Values registered in the domain **Reminder type record** are used for characterizing the purpose of a document reminder. The values in the domain **Reminder type record** are displayed in a drop-down box in the field **Reminder type,** for example, in the document details page - section 4 in the list named **Document reminders**.
Name group	**NG**	Values registered in the domain **Name group** are used for characterizing and grouping Contacts. The values are displayed in a drop-down box in the field **Group,** for example on the **Contact details** page.
Location type	**PT**	Values registered in the **Location type** domain are used for defining purpose and status of the current placement. The values are, for instance, displayed in a drop-down box in the column named **Placement code** in the list called **Case locations** in the **Case details** page.
Case type	**ST**	Values in the **Case type** domain could be: • ANK, Appeal • FOR, Enquiry • KLA, Complaint • OMJ, Re-registered

Domain type	Code	Description
		Use in Captia Web Client The values are used for characterizing cases. Values in domain **Case type** are displayed in a drop-down box, for instance, in the field **Case type** in the case details page.
Cust. dom. type	**TY**	The values in the domain **Custom domain type** are all domains. The domain **Custom domain type** is domain for all other domain types. If you want to create a new custom domain, you must create the domain as a value in the domain **Custom domain type**.
Subnumber type	**UT**	Values in the domain **Subnumber type** are all domains designed to contain **Subnumbers**. The actual subnumbers are created and edited in the **Sub-number** module. The subnumber module is displayed by means of the menu item **Categories** ▸**Subnumbers**.

Create values

This topic explains how to create a value in a custom domain. The procedure is the same whether the domain is a fixed domain or a user defined one.

Example

When you register cases in WorkZone Client or Captia Web Client concerning ships run aground, you must register the reason for the grounding. The organization has a list of so called Grounding codes. Each code describes a type of cause for the ships grounding.

You have already created the domain type **GC, Grounding cause** for the codes see Create domain type.

Your task now is to fill the domain with values. In this example, you are to create the following values:

- CO, Collision
- NM, Navigational mistake
- NP, No pilot
- SC, Submarine conditions
- WC, Weather conditions

Create domain values

1. Click **Basic Data** > **Custom Domain**.
2. Click the cell to the left of the **Domain type** in which you want to create values, in this example, **GC**, **Grounding cause**. The contents of the domain type is displayed in the upper right panel.
3. Click the empty cell at the bottom of the **Code** column.
4. Enter the value, i.e. the code identifying the value, in this example **CO**.
5. Click the next cell, **Text**, and enter the text defining the code, in this example **Collision**.
6. Enter a start date in the **Start date** column.
7. Repeat the steps 4 to 7 until you have created all the necessary values.
8. Click **Database** > **Save**.

If your system is running in multi-language mode, you must also add the culture specific texts in the lower right panel.

Next step in the process is to create a custom label named "Grounded:" The data field belonging to the label must be set to be validated against the values of custom domain "GC, Grounding cause", see Create label with validation.

You can manage domain types with values yourself, see User managed domains .

Edit values

You can edit an existing value belonging to a custom domain type. The following cells can be edited:

- Start date
- End date
- Text

edit a domain value

1. Click **Basic Data** > **Custom Domain**.
2. Click to the left of the **Domain type** in which you want to edit values.
3. In the upper right panel, click in the **date cells** of the domain type to be edited and in the lower right panel, click to edit **Text** cells.
4. Edit the data of the cell.
5. Place the cursor in another cell and click **Database** > **Save**.

You can manage domain types with values yourself, see User managed domains.

Terminate values

You can terminate values which are no longer in use by entering an **End Date.**

The following happens in WorkZone Client and Captia Web Client:

- Values no longer in use remain in place where they were originally used, for instance, in cases.
- The value is no longer available in the drop-down list of the field to which it originally belonged. However, it is still available in search pages.

terminate a value

1. Click **Basic Data** >**Custom Domain**.
2. Select the **Domain type** of which you want to terminate values.
3. Click the column to the left of the code of that domain type.

4. In the upper left panel, click **End date** of the value to be terminated. Click the cell once more to activate it. Today's date is entered into the cell by default.
5. Enter the date manually, edit each part of the date separately or select a date from the calendar.
6. Place the cursor in another cell and click **Database** > **Save**.

To terminate a value immediately, insert yesterday's date as the end date.

You can manage domain types with values yourself, see User managed domains.

The Filing periods Module

The **Filing periods** module manages preservation and disposal codes used at the termination of an archive period and/or transfer of data. The data in the **Filing periods** module cannot be edited.

Prerequisites for managing periodization

The prerequisite for gaining access to the **Filing periods** module is the access code **DATAADM**.

Click **Basic Data** > **Filing periods** to open the module.

Filing periods - preservation and disposal codes

These codes are managed in the **Custom Domain** module, see The Custom domain Module

This topic is only relevant for organizations and installations subjected to the rules and regulations of the Danish Archives Act, represented by the **Danish State Archives**, who are authorised to oversee the management of the records of Danish Public Authorities.

For more information regarding compliance - see the Danish State Archives website.

Filing periods meta data

You can register the following data in the **Filing periods** module.

Data	Description
Domain type	Domain Type
Code	Code
System	Name of the owner of the domain type - if needed
Code	Preservation/Rejection code
Text	Text describing the scope of the code
System	
Selection	
Start date	The date of initiation
End date	The date of termination
Source	The culture code of the master code
Text	Text describing the scope of the code
Culture	The current language code (i.e. default language).

The Contact module

The **Contact** module manages address types. The purpose of address types is to group the contacts in the Contact register. The contact defines the format of the ID of the contacts created in the register. The format of the ID could, for instance, be a personal identification number or a sequence number.

Click **Basic Data** > **Contact** menu to open the module.

Prerequisite

You need the access code **DATAADM** to access the **Contact** module.

About Contact type

The purpose of **Contact types** is to group the contacts in the Contact register. The contact type defines the format of the ID of the contacts created in the register. The format of the ID could, for instance, be a personal identification number or a sequence number.

If there are no contact in the **Contact** module, no contacts can be created by the users of WorkZone Client and Captia Web Client.

The individual contact is identified by its unique ID. The ID is composed of a single letter/digit contact type and a code. The ID for a company, for instance, consists of the contact type **C** and the contact code (the code being a sequence number)

C 3542, Cloak & Dagger Inc.

In this example, **C** is the contact type and the code is a sequence number **3542**. For each contact type, you can specify the way it forms its code using a predefined set of algorithms.

Contact types reserved by the system

Four contact types are reserved for special purposes. They supply data for drop-down lists in WorkZone Client and Captia Web Client.

You must not change or delete these four contact types:

- **A, Units** (i.e. organizational units.)
- **M, Employees** (i.e. case handlers)
- **K, Municipalities** (i.e. local government) - only default in some installations!
- **U, Committees.**

The register of the contact types **M** and **U** deviates from all other contact types. Their data is automatically transferred from Active directory (AD), and therefore you can only maintain them in Active Directory.

How many contact types do you need?

Your organization should keep the types to an operational minimum. You should always name new contact types in a clear and unambiguous manner to ensure that users of WorkZone Client and Captia Web Client cannot be in doubt which contact type to select when creating a contact.

Examples of needs for new contact types:

- Compliance with rules and regulations, for example, CPR or CVR.
- Domain knowledge or entities, such as houses, property, employees, memberships.
- Simplification, for example, merger of two companies or to remove redundancy when commencing a new archiving period.

contact types - the simple model

If no special reasons apply, it may only be necessary to add two types to the list of mandatory contact types: `P, Persons` and `C, Companies`.

Create an contact type

You can create two different types of contact types; either one with automatically generated ID (**Auto id**), or manually entered ID.

Create with auto ID

Create a contact type with auto ID

1. Click **Basic Data** > **Contact**.
2. Click the empty bottom cell of the column **Name type**.
3. Enter the value of the new contact type.
   You can enter one character into the cell - a letter between A and Z or a digit between 1 and 9.
4. Click in the **Auto id** cell.
5. Click once more in the cell and select **J** in the list (J = Yes).

6. In the column **Text**, enter a descriptive name for the contact type.
7. In the column **Comment**, enter a description of its use.
8. Place the cursor in another cell and click **Database** > **Save**.

If your system is running in multi language mode, you must also add the culture specific texts and comments in the bottom panel.

Create with Manual ID

Below is described how to create a contact type with manually entered code, that is ID.

Example

You must create a contact type with personal identification number (CPR-number). When the users in WorkZone Client or Captia Web Client create a contact with CPR-number, they must use this particular contact type.

Create a contact type with manual ID

1. Click **Basic Data**> **Contact**.
2. Click the empty bottom cell of the column **Name type**.
3. Enter the value for the new contact type, e.g. **P**.
   You can enter one character into the cell - a letter between A and Z or a digit between 1 and 9.
4. Click the cell **Code check**.
5. Click the drop-down box button of the cell.
6. Select an contact type, for example **CPR number**.
7. Click the **Display Format** cell twice. Enter the display format - in this example `XXXXXX-XXXX`.
8. Click in the cell **Name Code Length** twice.
9. Enter the maximum number of characters/digits of the code.
   In this example 10 (the dash is not counted).
10. In the column **Text,** enter a name for the contact type.

11. In the column **Comment**, enter a description of its use.
12. Place the cursor in another cell and click **Database** > **Save**.

If your system is running in multi language mode, you must also add the culture specific texts and comments in the bottom panel.

See also Contact type meta data.

Edit a contact type

You can edit information concerning existing contact types. You can edit all cells, except the cell **Name Type**, which is the ID of the contact type.

How to edit contact types

1. Click **Basic Data** > **Contact**.
2. In the upper panel you can edit all the cells that are not greyed out, and in the bottom panel you can edit **Text** and **Comment** cells.
3. Make your corrections.
4. Place the cursor in another cell and click **Database** > **Save.**

Delete a contact type

You can delete contact types which have never been used.

By mistake you have created the contact type **F** with the descriptive name **Farmer** now this must be removed.

How to delete contact types

1. Click **Basic Data** > **Contact**.
2. Click in the cell to the left the contact type you want to delete.
   The row is highlighted.

3. Click **Edit** > **Delete Row**.
4. Click **Database** > **Save**.

   The contact has been removed.

Contact type meta data

Contacts are identified by their unique ID. The ID is composed of two parts i.e. the **Contact type** and a **Code**. The contact type is **Name type** and the code is the **sequence number**.

In the **Contact** module you can register the following information:

Column	Description
Panel: **Upper panel**	Cells of contact types
Name type	The address type is identified by one character. Valid characters are letters from A to Z and numbers from 1 to 9 (both included). You cannot use the letters `A`, `M`, `K`, and `U`. They are reserved by the system: `A` = organizational unit, `M` = employee, `K` = municipality (local government) and `U` = committee.
Last Used Code	The last number issued to the contact type in question, if the counter mode is `J` (= yes).
Auto id	The following counter modes are available: • `J` (= yes) - The ID is an automatically generated sequence number. • `N` (= no) - You must enter the code manually. An empty cell = `N`.
Code Check	If the chosen **Auto id** was `N`, or left empty, you can select a suitable control from the list in the cell **Code Check**.

Column	Description
	List of controls By default you can only select the controls in bold, remaining controls depend on the customization of your installation: • **Nothing** - the manually entered code is subject to no control. • **Numeric** - the manually entered code must be numeric. • **CPR Number** - the code entered is automatically controlled according to the modulus 11 control*). The Central Office of Civil registration (CPR) by October 2009 discontinued the modulus 11 compliancy. • **SE Number** - the code entered is automatically controlled according to the modulus 11 control. • External SE number - SE number created in an external database. • External CPR number - CPR number created in an external database. • CPR Number • Property Number • CPR Number (KU-MatrikelStyrelsen) • Birthday and Sequence Number • **9 digit CPR Number** - 9 digit CPR number • **CPR Number (Færøerne)** - CPR number used on the Faroe islands - 9 digit CPR number)

Column	Description
	• **CPR Number (fictitious)** - fictitious cpr-number - day of birth dash sequence number. • Matrikel Number (Land register number) • CVR Number (Legal units) • CVR Number (Production Units) • CVR Number (Legal an Production units) • CPR Number (No modulus 11 check) • CPR Number (Færøerne, No modulus 11 check)
Display format	If the code must be entered according to a special format, enter the pattern here. If the code is a CPR number, the format entered here must be 10 Capital X's with the birthday and sequence number separated by a dash: XXXXXX-XXXX.
Name code length	If the Auto id was `N` (= no) or left blank, you can enter the number of digits assigned to the number. The name code can be up to 11 digits in length.
Access Code	If you fill in this cell, contacts created with this contact type are subject to restrictions. Only users with the proper authorization have access to see these contacts. You can enter an access code. It must exist in the access_code_domain to be valid. The access code entered here is transferred to every contact created with this contact code.
Text	Enter the specific description of the contact type here. Up to 32 characters. For contact type, for example, `C, Company`.

Column	Description
Comment	In this cell you can write an elaborated description - up to 240 characters - of the contact type.
Panel: **Bottom panel**	The panel is displayed when the program is working in multi language mode. Here the culture specific names of the values of contact types are displayed and managed.
Text	Enter the culture specific description of the contact type here. Up to 32 characters. For contact type `C, Company`. This is the type displayed in the Captia Web Client user interface according to the language selected by the user.
Comment	In this cell you can write an elaborated culture description - up to 240 characters - of the contact type.
Culture	In this cell, the culture code of the current contact type, defining the language for the **Text** and **Comment** cells.
Source	The current language code (i.e. default language).
Start date	If a start date is specified , the value will be available in WorkZone Client and the Captia Web Client from this date forward.
End date	If an end date is specified, the value will be available in WorkZone and Captia Web Client until this date occurs.

The Stopwords Module

The **Stopwords** module manages lists of words to be disregarded in free text searches. The words registered in the **Stopwords** module are ignored when a free text search is executed in

WorkZone Client or Captia Web Client.

Prerequisites for managing stopwords

The prerequisite for gaining access to the **Stopwords** module is the access code **DATAADM**.

Click **Basic Data** > **Stopwords** to open the module. The **Stopwords** lists already registered in the module are displayed in the left panel.

Default system stopword lists

The **Stopwords** module contains by default only one list of stopwords per culture.

Custom stopword lists

To add stopwords you must create a new stopword list specific for your organization and/or culture.

Create a custom stopword list

1. Click **Basic Data** > **Stopwords**.
2. Click the empty bottom cell of the **Stopword List** column.
3. Enter the name of the new stopword list. The cell allows for names of maximum 30 characters.
4. Click in the **List Type** cell and select **Custom** from the list.
5. Click **Database** > **Save**.
6. The dialog box "You must activate the stopword list in Oracle before the stopwords are used." is displayed. Click **OK** to continue.

Create stopwords

1. Click **Basic Data** > **Stopwords**.
2. Click the **Stopword List** in which you wish to create stopwords.
3. Click the leftmost cell of the row. The contents of the list is displayed in the right panel.
4. Click in the empty cell of **Stopword** column in the bottom row.
5. Enter stopword. Maximum 80 characters.
6. Place the cursor in another cell and click **Database** > **Save**.

Create Corporate Access Codes

Use the procedures below if you want to apply a corporate access code to a contact or to a file class in WorkZone Configuration Management, and it is the first time that this corporate access code is used.

If you want to create a simple corporate access code, such as (<Term Access Codes>&<Org. Access Codes>), you can do it in WorkZone Configuration Management in the Basic Data module. See Create a simple corporate access code.

As regards a combined corporate access code, such as (<Term Access Codes>&<Org. Access Codes>)|(<Term Access Codes>&<Org. Access Codes>), you must create it in WorkZone Client or Captia Web Client first and then select it in WorkZone Configuration Management. See Create a combined corporate access code.

Create a simple corporate access code

1. Click **Basic Data** > **Create corporate access code**.
2. Select one or more term access codes in the **Term Part** panel and one or more organizational access codes in the **Organizational Parts** panel, and then click **Save**. A message shows the access code that you just defined.
3. Click **OK** to create the organizational access code, or click **No** if you want to return to the **Create corporate access code** page to make corrections.

Create a combined corporate access code

WorkZone Client

1. In WorkZone Client, open a search page for any item such as a case, document, or contact.
2. Click **Read access** to open the **Edit read access** dialog box.
3. Click **Create new access code**.
4. Create the new combined access code, and click **Apply**. The new combined access code has been created. You do not need to perform the search in WorkZone Client.
5. Open WorkZone Configuration Management. The combined access code that you just defined is now available on the **Access Code** lists in WorkZone Configuration Management.

Captia Web Client

1. In Captia Web Client, open a search page for any item such as a case, document, or contact.
2. Click **Acc. code** to open the **Select - Acc. code** dialog box.
3. Create the new combined access code, and click **OK**. The new combined access code has been created. You do not need to perform the search in Captia Web Client.
4. Open WorkZone Configuration Management. The combined access code that you just defined is now available on the **Access Code** lists in WorkZone Configuration Management.

The Terms Module

The **Terms** module is a tool for the KMD technicians only. The **Terms** module contains texts used in the user dialog.

The **Terms** module is the user interface for the TERMS register. The Terms register is sub-divided according to the part of the WorkZone system that it is covering CLIENT, DOCINT, SOM.

prerequisite

The prerequisite for gaining access to the Terms module is that you have the access code **TERMSADM**.

Examples

Module type	Id	Culture	Text
SOM	USERMSG_FILE_CLOSED	da-DK	Sagen er afsluttet og kan derfor ikke ajourføres.
		en-GB	Case is closed and so, cannot be updated.

Meta data

Information	Explanation
Module type	The field is a list box. Here you have the following options: • CLIENT • DOCINT • SOM
Id	The unique identification of the individual item in the terms register.
Culture	Language/culture code for example eng-UK, da-DK. One line per language.
Text	The text that is displayed for the user.

Example

Module type	Id	Culture	Text
CLIENT	JS_RECORD_REJOURNAL_MOVE_ERROR	da-DK	Flytning fejlede for nogle af dokumenterne
		en-GB	Move failed for some of the documents

Categories

This section describes how to work with categories.

The Classification Scheme Module

The **Classification Scheme** module manages the hierarchically ordered decimal classification system. The individual items in the classification scheme are called classes.

Click **Categories** > **Classification Scheme** to open the **Classification Scheme** module.

About the classification scheme

Some organizations are bound by government regulations and must therefore comply with certain rules and regulations which dictate a certain configuration. Other organizations may choose a classification scheme that is closer to the way their business is organized or the business workflow itself.

Traditionally the classes have been organized into ten main classes. These are each divided into ten divisions, and each division into ten sections. This giving 10 main classes, 100 divisions and 1000 sections.

The classification scheme is in many ways equivalent to the decimal classification systems employed by the public libraries, for example, the Universal Decimal Classification system.

Each class is identified by a decimal number representing the subject content. Each class has a description of the subject content.

The purpose of a classification system

The purpose of a classification scheme is to organize the cases handled in WorkZone Client and Captia Web Client and the purpose of the classes and the subdivision is to facilitate retrieval of the cases and the documents.

Often the class is a part of the case number. The classes are subdivided in to as many levels as a class' subject dictates, that is cases are created on the lowest level on the most specific class, representing the subject and content of the case matter.

Prerequisites for managing the classification scheme

The prerequisite for gaining access to the **Classification Scheme** module is the access code **DATAADM**.

Mandatory system owned classes

Some classes are mandatory and system owned. **Do not remove these classes**.

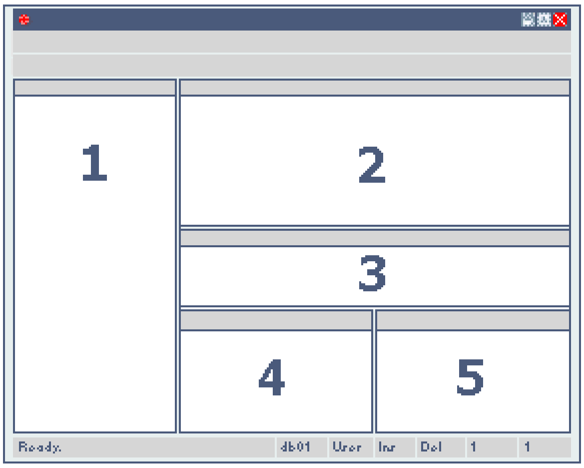
- SJ-STD contains all desktop cases i.e. when a new user logs on to Captia Web Client for the first time a desktop case is created. The desktop case is named SJ-STD-<username> for example SJ-STD-ABC.
- SJ-TEST is used for test purposes.
- SJ-SYSTEM contains and owns SJ-STD and SJ-TEST.
- SJ-TEMP is used by WorkZone Explorer and WorkZone Meeting.
- SJ-AGENDA is used by WorkZone Meeting.

Classification scheme meta data

You can register different types of information in the classification scheme:

- Information describing the class.
- Information regarding filing periods.
- Information concerning default data transferred to the case when it is created.
- Information transferred to the documents of the case when they are created.

In the table below is shown the data that can be registered in the classification scheme module describing a class.



Panel	Cell	Description
1		This panel displays the case classification scheme. The scheme is presented in a hierarchy that you can expand and collapse by clicking on +.
	Case Classification	When the **Classification Scheme** module is displayed, the classification scheme is displayed in the left panel: • Classes at root level and superior levels, which are not to be used for classifying cases are shown in red. Click the plus sign to expand the hierarchy and view the underlying levels. • Classes used in case creation are shown in black.
2		This panel contains basic data and functions of the class.
	Class	The class number. The classes are the individual items that together constitute the classification scheme.
	Title	The title of the class entry.
	Sub-number type	If the check box in the **Fixed SubNumber** cell is selected, this cell must be checked as well. Select the value for **Sub-number type** in the drop-down list. The selected value defines which domain of sub numbers is attached to

<table>
<tr><th>Panel</th><th>Cell</th><th>Description</th></tr>
<tr><td></td><td></td><td>the class.</td></tr>
<tr><td></td><td>Case creation</td><td>The check box offers two options:
The check box is selected: The users of WorkZone Client and Captia Web Client are permitted to create cases with the current class. The class is shown in black.
The check box is cleared: The class is not available for case creation in WorkZone Client and Captia Web Client. The class works as a heading for branch of the hierarchy and is shown in red.</td></tr>
<tr><td></td><td>Fixed SubNumber</td><td>The check box offers two options:
The check box is selected: The class must be subdivided by a sub number. When the users in WorkZone Client and Captia Web Client create a case with the current class they are prompted to select a sub number.
When this check box is selected, the option Sub-number type must be selected as well.
The check box is cleared: Sub numbers are not used for this class.
The sub numbers must preexist in the Subnumbers module and each subnumber domain containing the sub numbers must preexist in the Custom domain module.</td></tr>
<tr><td></td><td>Free Case Number</td><td>The check box offers two options:
The check box is selected: Cases created with this class must be numbered manually. The user in Captia Web Client must enter the case number into the field thus defining the unique ID of the case.
The check box is cleared: Case numbers are inserted automatically according to the method chosen, except for CPR-numbers.</td></tr>
</table>

Panel	Cell	Description
		Creation of free case number is not supported in WorkZone Client.
	Start Date	Enter the date from which the class should be enabled.
	End Date	Enter the date of termination.
3		In this panel the culture specific titles of the classes are displayed and managed. The culture specific title of the current class is maintained here.
	Title	The title of the class entry - that is the name of the class.
	Description	Enter a description of the class.
	Culture	The culture code of language to be used for the title.
	Source	The current language code (the default language).
4		The panel displays case information. The information registered here is automatically inserted into the corresponding fields of the case details page in Captia Web Client and Captia Web Client when the case is created. This panel also contains filing period data. • Do not fill in the field unless required. • The section is only active if class and title is shown in its header.
	Type	Select the case type from the list. The case types come from the custom domain **ST**, **Case type**.
	Responsible OU	Select the organizational unit that you want to apply as responsible unit to the current case class. You can also select **@Unit** to apply the unit of the user who creates cases in the specific case class.
	Executing OU	Select the organizational unit that you want to apply as executing unit to the current case class. You can also select **@Unit** to apply the unit of the user who creates cases in the specific case class.

Panel	Cell	Description
	Case Handler	Select the employee that you want to apply to the current case class. When new cases with this case class are created, the selected employee is applied automatically as case handler. You can also select **@Me** to apply the current user who creates the case in the specific case class as case handler.
	Access Code	This access code determines which users are allowed to see and use this class. Select the access code that is relevant for the class from the list.
	Default access code	If you select an access code, it will automatically be inserted into all cases created with the current class. The default access code determines which users are allowed to see this case.
	Default update code	If you select an update code, it will automatically be inserted into all cases created with the current class. The default update code determines which users are allowed to edit this case.
	Mask	The purpose of Mask to allow you to assign special case number formats to individual classes. Some case number formats only work if the **Create Case** page in Captia Web Client is customized. To configure case number masks, see About the case number mask.
	Cover	Enter the name of the case cover to be printed for cases in this class.
	Response limit for records	This section concerns reply deadlines. In Captia Web Client **Response limit** is called **Reply deadline** and a record is a document.
	First record	Fixed response limit for the first record In this cell, you can enter a number. When the user archives the first document of a case in WorkZone Client and Captia Web Client, a date is automatically inserted into the

Panel	Cell	Description
		Reply deadline field of the document. If you type 14, the deadline would be 14 days after the date of registration.
	Following records	Fixed response limit for the following records. In this cell, you can enter a number. When the user archives the next document of a case in WorkZone Client or Captia Web Client, a date is automatically inserted into the **Reply deadline** field of the document. If you type 28, the deadline would be 28 days after the date of registration.
	Draft Versioning	This section allows you to apply draft versioning to a class.
	Apply draft versioning automatically to this class	Select this check box to apply draft versioning automatically to new cases in this class. See Apply draft versioning.
	Filing Period	This section is for information concerning the shift from one classification period to another. Here you can enter information facilitating a shift from one period to another.
	Previous Case Class	Class in the previous classification period.
	Previous Subnumber Type	Sub number type in the previous classification period, i.e., archiving period.
	Upcoming Case Class	Class in the next classification period.
	Upcoming Subnumber Type	Sub number type in the next classification period.
	Disposal	Code defining the preservation and disposal rules in force for the

Panel	Cell	Description
	Code	class.
	Transfer Code	Code that specifies how cases and documents in the current class are transferred to the next classification period.
	Bottom right, right side panel **<Class and title>**	Information automatically transferred to a case at creation. The purpose of this function is to minimize tedious registration work. Typical cases subject to a standardized case handling process, such as complaints, call for standardized registration. With this function you can have certain basic data inserted automatically into all new cases of this type.
5	**Info**	On this tab you can register several entries of supplementary case information. Each row contains two cells: • The **Label** cell is a drop-down box. The contents of the drop-down box originates from the custom label module label type **SO, Suppl. case**. • The **Information** cell is a free text field or a drop-down box. This depends on the label selected for the cell **Label**. See - Routine and -Custom label types and data fields. Normally the information is entered by the case handler who selects the relevant information during the case handling process. In Captia Web Client When a user creates a new case with the current class, these entries are automatically inserted. The user can see and update the entries in the bottom section of the case details page - click **More** ... > **Information**.
	Date	On this tab you can register several entries of supplementary case dates.

Panel	Cell	Description
		Each row contains one cell. The **Label** cell is a drop-down box. The contents of the box originates from the custom label module label type **SD, Suppl. case dates,** see also Dates. Normally the dates are entered by the case handler during the case handling process. In Captia Web Client When a user creates a new case with the current class, these entries are automatically inserted. The user can see and update the entries in the bottom section of the case details page - click **More** > **Dates**.
	Keywords	On this tab you can register several entries of keywords. Each row contains one cell. The **Keyword** cell is a drop-down box. The contents of the list originates from the **Dictionary** module.
	Contacts	This tab contains rows with three cells: • **Contact type** (also called contact type) - for example, Person with CPR-number • **Contact code** (also called Sequence number) - for example 180562-5903 • **Role** - for example Applicant, Replicant and so on. You can insert several rows. You can insert rows with only a role or rows with both role and a specific contact. In Captia Web Client When a user creates a new case with the current class, these rows are automatically inserted. The user can see and update the rows in the bottom section of the case details page - click **More** > **Parties**.

Create a class

Always activate the class of the level above the level where you want to create a new class.

Example

As an example, if you wish to create class "322, Internally financed projects," you should start in class 32. The classification scheme of your organization is constructed in such a way that classes at root level consist of one digit, classes directly subordinated consist of two digits, and classes at the lowest level consist of three digits:

3 Physical working conditions

32 Projects concerning building and construction

322 Internally financed projects

create a class

1. Click **Categories** > **Classification Scheme**.
2. In the left panel, click the class above the class level in which you want to create classes.
3. In the upper right panel, click the empty bottom cell of the column **Class**.
4. Click the cell once more and enter the number of the new class.
5. Click the **Title** cell. Click the cell once more and enter the name of the class - in this example "**Internally financed projects**".
6. Select the check box of the cell **Case Creation**.

   If your class is just a "level" and not an active class, leave it unchecked. Fill in the following cells only if your class requires it: Fixed Subnumber, Free Case Number, Start Date, and End Date.
7. Click **Database** > **Save** to save the class and the basic information.

If your system is running in multi language mode, you must also add the culture specific titles in the right middle panel.

add information transferred to cases at creation

Add file information

Use the bottom left panel and the bottom right panel to add file information.

1. Click to the left of the class in the upper right panel.
2. In the **File Information** section, fill in the fields as necessary.

- Mask - only fill in this field if the case number format of this particular class should deviate from default.
- Cover - use this if you have a physical paper archive with special case folders. Fill in the name of the report holding the case folder template. Now you can print case folders with case information for the archive.

3. Click **Database** > **Save**.

Add response limit for records

Use the bottom left panel and the bottom right panel to add **response limit for records**.

1. Click the **First record** field to enter the number of days to be inserted into the document meta data that is in the **Reply deadline** field in the document details page in Captia Web Client.

   When the meta data in Captia Web Client are saved in the reply deadline date will be postdated 21 days if you entered "21".

2. Enter data into the field **Following records** in the same way. This affects all other documents than the first document.
3. Place the cursor in another cell and click **Database** > **Save**.

Add information, date, keywords, contacts

Use the bottom right panel to add **Info, Date, Keywords and Contacts**.

1. Click the relevant tab, for example the **Info** tab.
2. Click the empty cell in the **Label** column and select a label from the list.
3. Repeat this procedure to add more rows.

4. Place the cursor in another cell and click **Database** > **Save**. Use the same procedure to add rows on the other tabs.

For description of the above-mentioned cells, see About meta data.

Edit a class

You can edit all information concerning a class except **Class.** The content of this cell is the unique ID of the **Class**. As soon as the newly created class has been saved, the cell is locked for editing.

How to edit a class

1. Click **Categories** > **Classification Scheme**.
2. In the left panel, click the class a level above the class to be edited.
3. Click to the left of the cell of the class to be edited.

   The class and all the panels are now active.

4. Click in the cell or cells you want to edit (some cells such as **Subnumber type** and dates must be clicked twice)
5. Make the changes.
6. Place the cursor in another cell and click **Database** > **Save**.

Description of the cells that can be edited - see About metadata.

Terminate or delete a class

If the area of responsibility of the organization changes, some classes might have to be terminated. Fill in the **End date** cell to terminate the classes and possibly a future date. You can delete classes that are never used.

terminate a class

1. In the **Classification Scheme Hierarchy** panel to the left, click the class a level above the class to be terminated.
2. Click twice in the **End Date** cell and enter the date of termination.
3. Place the cursor in another cell and click **Database** > **Save**.

   The class can no longer be used to create cases, however it can still be used as a search criteria.

delete a class that has never been used

1. In the **Classification Scheme Hierarchy** panel to the left, click the class a level above the class to be deleted.
2. Click to the left of the class you want to delete.
3. Click **Edit** > **Delete Row**.
4. Place the cursor in another cell and click **Database** > **Save**.

Apply draft versioning

You can apply draft versioning to new cases in a class.

apply versioning

1. Click **Categories** > **Classification Scheme**.
2. Select the class to which you want to apply draft versioning automatically.
3. In the bottom left panel, go to the **Draft Versioning** section, and select the **Apply draft versioning automatically to this class** check box.

See Draft versioning

The Facets-based Classification Scheme Module

In the **Facet-based Classification Scheme** module you can manage the facet scheme. The facet scheme is a hierarchically ordered keyword classification system. It is a system of keywords consisting of coordinate groups of keywords, describing an area of responsibility within the organization.

Click **Categories** > **Facet-based Classification Scheme** to open the facet based classification scheme.

See also Classification Scheme

About facets

Facets can be employed in two ways, either as a supplement to the Classification Scheme or instead of a classification scheme. If you employ it as the classification tool of your organization, its purpose is similar to that of a classic classification scheme, however with more focus on domain keywords - belonging to more than just one area - as opposed to the more rigid registration on just one class.

The default interface for facets is implemented on the details pages of cases and/or documents in WorkZone Client and Captia Web Client at installation. The default configuration is four fields for facets. One field for each root facet and its branches of keywords. More (or fewer) root facets can be implemented, however this requires special configuration and customization of the details pages.

Prerequisites for managing Facet-based Classification Scheme

The prerequisite for gaining access to the **Facet-based Classification Scheme** module is the access code **DATAADM**.

See also Classification scheme.

Facet meta data

The table below displays the information you can enter to describe facets.

The below description is that of a default installation. If you have a customized facet installation, please refer to your scope documentation as your implementation may differ from the below description.

Panel	Cell	Description
Left panel		This panel displays the facet based classification scheme. The scheme is presented in a hierarchy where you can expand and collapse levels by clicking on +.
	Facet Classification	When the **Facet-based Classification Scheme** module is displayed, the facet classification scheme hierarchy is shown in the left panel: • All facet levels leading towards facet words are shown in red; the facet words are shown in black. • The facet tree is expandable from the level of Root facets to Facet groups to Facet words. • Facet words are the registration level. Click the plus to expand the hierarchy to display the subordinate facet groups and their facet words. Click the minus to collapse the hierarchy and hide the subordinate facets.
Upper right panel Facet<Facet and title>		In this panel, you register basic data and functions of the facet.
	Class	In this cell the facet is entered. The facets are the individual items that together constitute the facet classification scheme thesaurus-hierarchy. When you have saved a new facet, you cannot change it any more - it is the unique ID of the class.
	Title	The title is the facet word, for example the key word that is shown to the end user in WorkZone Client and Captia Web Client.
	Priority	Enter a number here. The number entered defines where the

Panel	Cell	Description
		class (that is the facet) is displayed in a list of classes (that is the facets).
	Case creation	• When the check box is selected, the users can add this facet to cases. The facet is shown at the lowest level of the root facet. This word will be shown in black. • When the check box is cleared the users cannot add this facet to cases. The facet is either a root facet or a group facet guiding the user towards the facet words. These words will be shown in red.
	Universal	By default **Universal** is not employed. **Universal** is only in effect with specific customizations. When a root facet, for example, is marked as universal, no more than one facet of this type is allowed on a particular case or document.
	Mandatory	By default **Mandatory** is not employed. **Mandatory** is only in effect with specific customizations. When a root facet, for example, is marked as mandatory, at least one facet of this type must be registered with the case or document.
	Start Date	The date determines when the facet is available for use.
	End Date	The date determines when use of the facet is terminated.
	Access Code	If you select an access code, the facet will only be displayed for users with this access code. If you are using corporate access codes, you may choose only group access codes in this field.
	Default Access Code	By default **Default Access Code** is not employed. **Default Access Code** is only in effect with specific customizations. If you select an access code, it will automatically

Panel	Cell	Description
		be inserted into all cases created with the current class. The default access code determines which users are allowed to see this case .
	Default Update Code	By default **Default Update Code** is not employed. Default Update Code is only in effect with specific customizations. If you select an update code, it will automatically be inserted into all cases created with the current class. The default update code determines which users are allowed to edit this case.
Middle right panel		In this panel, the culture specific titles of the facets are displayed and managed. The culture specific title of the current class is maintained here.
	Title	The culture specific name of the facet.
	Culture	The culture code of language to be used for the title.
	Source	The current language code (the default language).

Working with facets

The facet scheme is composed of groups of facets. At the top level are the root facets and below the hierarchy of groups of facets. At the bottom level are the facets used for characterizing cases and documents.

By default the system contains 4 root facets. The facets of each root facet can be organized in several sub levels.

By default the WorkZone Client and Captia Web Client details pages for cases and documents can contain fields for the four root facets and their hierarchies of facets. More or fewer root facets can be implemented, however this demands special configuration of the details pages.

Example - a root facet with two levels

The root facet in the example below is **Country**. On the second level in the facet scheme are continents, for example, Africa and Europe. The facet words are the individual countries - in this example, three countries in each continent.

F10, Europe	**F10001, Denmark** **F10002, Holland** **F10003, Portugal** **F20001, Morocco** **F20002, Kenya** **F20003, Angola**

The Captia Web Client user navigates the facets from a pop-up dialog from one level to the next or searches for a specific facet word. The Captia Web Client user then selects the facet words that characterized the current case or document.

In this example, the facets on the lowest level - facet words, for example, Angola or Portugal, are the facets the Captia Web Client user would use in characterizing the entity.

How to enter the facets in module Facet-based Classification Scheme

In the table below is shown how the cells are filled in:

	Root facet: Country	Facet group: Europe	Facet word: Denmark
Class	**Facet1DB**	**F10**	**F10001**
Case Creation	cleared	cleared	**Selected**
Universal	*)	*)	*)
Mandatory	*)	*)	*)
Access Code	optional	optional	optional
Default Access Code	*)	*)	*)
Default Update Code	*)	*)	*)

	Root facet: Country	Facet group: Europe	Facet word: Denmark
Start Date	optional	optional	optional
End Date			
Title	**Facet1DB**	**Europe**	**Denmark**
Text	**Country**	**Europe**	**Denmark**

*) By default not in use.

Create facets

The facet scheme is arranged as a hierarchy. At the top level are the root facets. Below each root facet you can build a hierarchy of facets. By default, four root facets are at your disposal. If more or fewer are needed, the details pages must be customized.

In the table below is a description of the general process of registering the facet scheme:

Step	Action
1	First create the 4 root facets. The four root facets are: **Facet1DB**, **Facet2DB**, **Facet3DB**, **Facet4DB**. **Note**: All four root facets must preexist in the module to make the facet functionality work properly. Even if you only employ, for instance, two of the root facets. When you create a root facet, enter the name into the ID cell named **Class**, for example **Facet1DB** The name of the root facet, for example **Facet1DB,** must be entered into the **Title** cell in this example "Country". However, unless **Facet1DB**, is configured in the `customjs.js` file, **Facet1DB** will be what meets the end user in WorkZone Client and Captia Web Client! The name entered into the title cell is NOT displayed for the users in WorkZone Client and Captia Web Client

Step	Action
2	Secondly you must enter the next level of facets. If it is a very small facet scheme, you could enter the facets used as keywords here. If it is a larger facet scheme, enter a set of facet groups here. For example, the continents - **Africa, Asia, Europe** etc.
3	Thirdly add a new level (group facets) or enter the facets used as keywords - for example, the countries **Algiers, Morocco, Tunisia,** etc.

If you operate with both a classification scheme and facet based classification scheme, the IDs of the facets must not coincide with the IDs of the classes.

CreatIng facets

Create root facets

1. Click **Categories** > **Facet-based Classification Scheme**.
2. In the left panel, click **Case Classification**.
3. In the upper right panel, click in the empty cell of the column **Class** and enter the ID of the first root facet, in this example `Facet1DB`.
4. Click twice in the **Title** cell and enter the name of the facet, in this example `Country`.
5. In the **Start Date** cell, enter the initiation date.
6. Place the cursor in another cell and then click **Database** > **Save**.
7. Repeat this procedure to create the other root facets. If no facet groups are needed, proceed to **Create facets** below.

If your system is running in multi language mode, you must also add the culture specific titles in the lower right panel.

Create facet groups

1. Click **Categories** > **Facet-based Classification Scheme**.
2. In the left panel, click the root facet you want to work with, in this example `Facet1DB`.
3. In the upper right panel, click in the empty cell of the **Class** column and enter the ID of the facet group, in this example `F10`.
4. Click twice in the **Title** cell and enter the name of the facet group, in this example `Europe`.
5. In the **Start Date** cell, enter the initiation date.
6. Place the cursor in another cell and then click **Database** > **Save**.
7. Repeat the procedure to create the other facet groups.

If your system is running in multi language mode, you must also add the culture specific titles in the lower right panel.

Create facet words

1. Click **Categories** > **Facet-based Classification Scheme**.
2. If you recently created facet groups, it is prudent to click **Database** > **Refresh** to update the facet hierarchy.
3. In the left panel, click the plus of the root facet that you want extend, in this example `Facet1DB`.
4. Now, click the facet group that you want work with, here `Europe`.
5. In the upper right panel, click in the empty cell of the **Class** column and enter the ID of the facet word, in this example `F100`.
6. Click twice in the **Title** cell and enter the name of the facet word - in this example `Denmark`.
7. In the **Start Date** cell, enter the initiation date.
8. Place the cursor in another cell and then click **Database** > **Save**.
9. Repeat the procedure to create the other facet words.

If your system is running in multi language mode, you must also add the culture specific titles in the lower right panel.

Edit facets

You can edit all information concerning a facets except for the **Class.** The content of this cell is the unique ID of the class, that is the facet. As soon as the newly created facet has been saved, the cell is locked for editing.

Edit a facet

1. Click **Categories** ▸ **Facet-based Classification Scheme.**
2. In the left panel, click the facet level above the facet to be edited.
3. Click to the left of the cell of the facet to be edited.
4. Click in the cell or cells you want to edit (some cells like dates and codes must be clicked twice) and make the changes.
5. Place the cursor in another cell and then click **Database** > **Save**.

Description of the cells that can be edited - see About meta data.

Delete or terminate facets

If the area of responsibility of the organization changes, some facets may have to be terminated. Fill in the end date cell to terminate the facets or, if convenient, a future date. You can delete facets that are never used.

terminate a facet

1. In the left panel - **Facet-based Classification Scheme Hierarchy** - click the facet a level above the facet to be terminated.
2. Click twice in the cell **End Date** and enter the date of termination.
3. Place the cursor in another cell and then click **Database** > **Save**.

The class can no longer be used to create cases but it can still be used as a search criteria.

delete a facet that has never been used

1. In the left panel - **Facet-based Classification Scheme Hierarchy** - click the facet a level above the facet to be deleted.
2. Click to the left cell of the row of the class you want to delete.
3. Click **Edit** ▸ **Delete Row**.
4. Place the cursor in another cell and then click **Database** > **Save**.

The Subnumbers Module

The **Subnumbers** module manages subnumbers. Subnumbers are used for subdividing classes - in the module Classification Scheme.

Click **Categories** > **Subnumbers** to open the module.

About subnumbers

The **Subnumbers** module manages subnumbers. Subnumbers are used for subdividing classes in the **Classification Scheme** module. For example, the class "4507, Bicycle roads" must be subdivided according to a municipality code. Each municipality is identified by a unique code. A custom domain must be created to contain the municipality codes and the codes registered in that domain.

Lastly the dependency between the class, in the classification scheme, and the domain must be established.

Prerequisites for managing Subnumbers

The prerequisite for gaining access to the **Subnumbers** module is the access code **DATAADM**.

Configure subnumbers

To use subnumbers with the classification scheme, the following four preconditions must be met:

- Subnumber domain types must be pre-created.

  You must create domains for each set of subnumbers. This is done in the **Custom Domain** module. Create each subnumber type under the domain type entry UT, Undernummertype.

- All subnumbers must be created in their respective domain types.

  You must create each set of subnumbers in their specific domain types. This is done in the **Subnumbers** module.

- The case number format must be adjusted to contain Subnumbers.

  You must enable the use of subnumbers in the configuration of your case number. This means that the code for subnumbers must be included in the case number mask. This is done in the **Owner** module in the **Case Number Format** field.

- The Classification Scheme must be set up to handle Subnumbers.

  Finally, you must connect each subnumber type with the relevant class in the classification scheme. This is done in the **Classification Scheme** module.

Create a subnumber domain

Some classes in the classification scheme are subdivided by subnumbers , for example, municipalities. The class "4507, Bicycle roads" must be subdivided according to a municipality ID code. First a custom domain, that is a subnumber type, must be created to contain the municipality codes, in this example MU, Municipality. It must be created in the custom domain **UT** in the custom domain module - **Basic Data** > **Custom Domain**.

Create a subnumber

With the subnumber type "MU, Municipality" in place, you now need to create each individual subnumber - in this case, each municipality. You create these subnumbers in the Sub-numbers module - **Categories**▸**Subnumbers**.

Adjust the case number format

Then you may have to adjust the case number format to make allowance for subnumbers. The case number format is set up in the **Owner** module in **Case Number Format** section - **Oper-ation**▸**Owner**.

In this example the case number format should be: 2009-4507/175-0003 - with 4507 rep-resenting the class and 175 the municipality. The case bearing this number would then be the 3rd case regarding Bicycle roads (4507) in the Municipality of Rødovre (175).

To configure the case number format to allow the use of subnumbers reflecting the example, it should be:
`aaaa-gggg(/uuu)-LLLL:`

- aaaa- = year, e.g. 2009 followed by a dash
- gggg = class of max four characters, e.g. 4507
- (/uuu) = subnumber of max three characters, e.g. 175 starting with a front slash. The parentheses signify that subnumbers are only used if specified in the Clas-sification Scheme.
- -LLLL = sequence number of max four characters. The numbering is automatic and proceeded by a dash. The capital L indicates that zeros are included with numbers of less than four digits, e.g. 0003.

Establish A dependency between Subnumbers and Classes of the Classification Scheme

Finally you have to link your subnumber domains to the classes in the Classification Scheme. The dependency is made in the Classification Scheme module - **Categories**▸**Classification Scheme.**

Locate the Class. Insert the subnumber type into the cell called **Sub-number Type**. Now the class knows where to validate the subnumbers. If the subnumber should be compulsory, the option **Fixed SubNumber** must be enabled.

Subnumbers in Captia Web Client

When users create a case selecting e.g. class 4507, they are prompted to select a subnumber from, in this case, the domain **MU, Municipality**.

Create subnumbers type

You can use subnumbers to subdivide individual classes in the Classification Scheme. To do this, you must create the necessary domains for the subnumbers. These domains are subnumber types in the **Custom Domain** module. The subnumbers type must be created in the **UT** domain.

Example

Lets say you need to create a subnumber type for **Municipalities**. You need to register municipality in order to subdivide certain classes accordingly.

create a subnumber

1. Click **Basic Data** > **Custom Domain**.
2. In the left panel select **UT**.
3. Click in the cell to the left of domain type **UT**.
4. Click the empty bottom cell of the column **Code**.
5. Enter an identification code for the new subnumber type - maximum 8 letters.
   (In this example the code entered is MU.)
6. Click the next cell.
7. Place the cursor in another cell and click **Database** > **Save**.

If your system is running in multi language mode, you must also add the culture specific texts in the lower right panel.

Create a subnumber entry, see Create subnumbers.

Edit subnumber types

You can edit the following **Subnumber Type** information:

- Start date - you can change the date of initiation.
- End date - you can change the date of termination
- Text - you can change its description (max 65 characters).

edit a subnumber type

1. Click **Basic Data** > **Custom Domain**.
2. In the left panel, click the left most cell of the row **UT**.
3. In the upper right panel, click in the **date cells** of the subnumber to be edited.
4. In the lower right panel, click to edit **Text** cells.
5. Edit the data of the cell.
6. Place the cursor in another cell and click **Database** > **Save**.

Terminate subnumbers type

Subnumber types with subnumbers registered on cases in WorkZone Client and Captia Web Client cannot be deleted. They must be terminated.

If a set of subnumbers is no longer needed, you must discontinue the subnumber type. Then disconnect the subnumber type from the classes in the **Classification Scheme**.

terminate a subnumber type

1. Click **Categories** > **Subnumbers**.
2. In the right panel, click to the left of **UT**.
3. In the upper right panel, click in the **End date** cell of the subnumber type you want to discontinue.
4. Click once more to input the date of the discontinuation.
5. Place the cursor in another cell and click **Database** > **Save**.

disconnect a subnumber type from active classes

1. Click **Categories** > **Classification Scheme**.
2. In the Classification hierarchy, select the class from which you want to disconnect the use of subnumbers.
3. Click in the Subnumber type column, the cell to activate.
4. Click once more to open the drop-down box of the cell.
5. Select the empty line in the top of the list.
6. Clear the check box **Fixed SubNumber**.
7. Place the cursor in another cell and click **Database** > **Save**.

Create subnumbers

You can create new subnumbers. Subnumbers are grouped according to type. Each type is created in the **Custom Domain** module under the domain type entry UT.

Example

You need to create a number of municipality subnumbers. It is a prerequisite that the municipality subnumber type already exists in the custom domain.

create a subnumber

1. Click **Categories** > **Subnumbers**.
2. In the top panel, click bottom row cell of the column **Number Type**.
3. Click once in the cell to activate the drop-down box.
4. Click the drop-down button.
5. Select the relevant value - in this example MU, Municipality.
6. Click in the adjacent cell of the **Number** column and enter the relevant code, in this example 175.
7. Select the check box in the **Create** column to make the subnumbers available for selection in the **Child case group** field in WorkZone Client and the **Subnumber** field in Captia Web Client when creating new cases.
8. Place the cursor in another cell and click **Database** > **Save** to save the code.
9. Click the cell **Text** in the bottom panel and enter the description for the code, in this example Rødovre.
10. Place the cursor in another cell and click **Database** > **Save**.

You have now successfully created a new Municipal-subnumber in the subnumber domain MU, Municipality.Repeat the procedure from step 2 to create additional subnumbers.

See also Create subnumber types.

Edit Subnumbers

You can edit information about existing subnumbers. You can edit the cells **Create** and **Text**.

Example

If, for instance, the name of a municipality has been misspelled you have to correct the spelling mistake.

edit a subnumber

1. Click on **Categories** > **Subnumbers**.
2. Select the code of the Municipality you want to edit in the **Number** column.
3. The text describing the code is shown in the bottom panel in the **Text** column.

4. Click in the cell you want to edit.
5. Enter your change.
6. Place the cursor in another cell and click **Database** > **Save**.

See also Edit subnumbers type.

Delete/disable subnumbers

You can delete existing subnumbers that have never been in use.

delete a subnumber

If, for example, a municipality was discontinued or merged with another. The municipality has been created anyway by mistake. The municipality subnumber must now be terminated.

1. Click **Categories** > **Subnumbers**.
2. In the **Number** column, click the number code of the subnumber you want to delete.
3. Click the left most cell of the row. The row is highlighted.
4. Click **Edit** > **Delete Row**. The Subnumber is deleted.
5. Click in another cell.
6. Click **Database** > **Save**. The entry has been deleted.

terminate a subnumber

A subnumber is no longer in use. It has been used for an extended period, so it cannot be deleted. It must be disabled.

1. Click **Categories** > **Subnumbers**.
2. In the **Number** column, click the number code of the subnumber you want to disable.

3. Select the subnumber to disable.
4. Clear the check box in the **Create** column.
5. Place the cursor in another cell and click **Database** > **Save**.
   The subnumber is disabled.

The Dictionaries Module

In the **Dictionary** module you can manage keywords.

Click **Categories** > **Dictionary** to open the **Dictionary** module.

About dictionaries

In the **Dictionary** module you can manage keywords. When the dictionary is turned on, all keywords used in WorkZone Client and Captia Web Client must be registered in the **Dictionary** module. Words to be used as keywords must be created in the dictionary. The keywords are used for characterizing cases and documents in WorkZone Client and Captia Web Client.

When the dictionary is turned on, the WorkZone Client and Captia Web Client users must select keywords for cases and documents in the dictionary. Thus the dictionary is meant to hold the keywords allowed to be registered on cases and documents. The dictionary ensures that only approved words can be applied.

You can create both keywords and synonyms for keywords. The synonym function is merely a way of replacing words not approved for use. If you enter the synonym, it will automatically be replaced by the correct word. INSECT POWDER for instance could be registered as a synonym for INSECTICIDE. When INSECT POWDER is entered, it is automatically replaced by INSECTICIDE.

Prerequisites for managing Dictionary

The prerequisite for gaining access to the **Dictionary** module is the access code **DATAADM**.

Dictionaries meta data

The dictionary contains keywords. Keywords are used for characterizing cases and documents in WorkZone Client and Captia Web Client, and not least to facilitate retrieval.

A keyword is registered as two entries, that is a keyword synonym and a standard keyword. If the keyword synonym and the standard keyword are identical, the word is a proper keyword. If, on the other hand, the keyword synonym and the standard keyword are different, the word is a synonym.

The standard keyword is used on, for example, on cases or documents. The keyword synonym on the contrary is automatically replaced by the standard keyword.

In the **Dictionary** module you can register the following information concerning keywords:

<table>
<tr><th>Data</th><th>Description</th></tr>
<tr><td>Keyword Synonym</td><td>Enter the keyword - that is the word that replaces the synonym.

Example

You want to register the word <code>INSECTICIDE</code> as a keyword. This means that <code>INSECTICIDE</code> must be registered both in column Keyword Synonym column and in the Standard Keyword column:

<table>
<tr><th>Keyword Synonym</th><th>Standard Keyword</th><th>User</th><th>Date</th></tr>
<tr><td>INSECTICIDE</td><td>INSECTICIDE</td><td>LOF</td><td>27-05-2013</td></tr>
</table>
</td></tr>
<tr><td>Standard Keyword</td><td>Write the synonym - that is the word that is replaced by the keyword.

Example

You are to register the word <code>INSECT POWDER</code> as a synonym for <code>INSECTICIDE</code>. This means that the word <code>INSECT POWDER</code> must be registered in the Keyword Synonym column and the word to replace it in the Standard Keyword column:</td></tr>
</table>

<table>
<tr><th>Data</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Keyword Synonym</th><th>Standard Keyword</th><th>User</th><th>Date</th></tr>
<tr><td>INSECT POWDER</td><td>INSECTICIDE</td><td>LOF</td><td>27-05-2013</td></tr>
<tr><td>INSECTICIDE</td><td>INSECTICIDE</td><td>LOF</td><td>27-05-2013</td></tr>
</table>
The word INSECT POWDER is now registered as a synonym. If a user in, for example, the WorkZone Client case details page enters INSECT POWDER i the keyword field, it will automatically be replaced with INSECTICIDE.</td></tr>
<tr><td>User</td><td>The cell displays the ID of the user who initially created the keyword or the synonym.
The ID of the user is by default automatically entered into the field when the user registers a keyword.
The cell is locked and cannot be edited.</td></tr>
<tr><td>Date</td><td>The cell displays the date when the keyword was registered.
The date is by default automatically entered into the cell. Hereafter the cell is locked and cannot be edited.</td></tr>
</table>

Prerequisite

The prerequisite for using the **Dictionary** module is that it is pre-configured in the **Owner** module.

In this module, you must decide whether you want to use the dictionary. If you want to use it, you must:

- Specify which characters are not allowed in connection with keywords.
- Enter a minimum number of characters a keyword must consist of.

See Configure the dictionary in the Owner module.

Create keyword

New entries in the dictionary are registered by a keyword synonym and a standard keyword. If the entry is a keyword, the words entered in both cells must be identical. If for instance, you want to register the word `INSECTICIDE` as a keyword, it must be entered as a keyword synonym **INSECTICIDE** and a standard keyword `INSECTICIDE`.

register a new keyword

1. Click **Categories** > **Dictionary**.
2. In the **Keyword Synonym** column, click the empty cell in the bottom row.
3. Type the word.
4. Click the next cell in the **Standard Keyword** column.
5. Type the word again.
6. Select the **Enabled** check box. The check box must be selected before the word can be deployed in Captia Web Client.
7. Click **Database** > **Save**. User name and date are filled in automatically.

Create synonym

To register a synonym in the dictionary, you must enter the synonym in the **Keyword Synonym** column and the keyword in the **Standard Keyword** column. For example, you want to register the word `INSECT POWDER` as a synonym to `INSECTICIDE`. Do this by entering `INSECT POWDER` as the keyword synonym and `INSECTICIDE` as the standard keyword.

The synonym function is merely a control. It replaces illegal synonyms with the proper keyword. If you, for example, enter `INSECT POWDER` into the **Keyword** field on the case details page in WorkZone Client and Captia Web Client, `INSECT POWDER` will automatically be replaced by the proper keyword which in this example is `INSECTICIDE`.

Register a synonym

1. Click **Categories** > **Dictionary**.
2. In the **Keyword Synonym** column, click the cel in the bottom row.
3. Type the synonym.
4. Click the next cell in the **Standard Keyword** column.
5. Type the keyword to be used.
6. Select the **Enabled** check box. The check box must be selected before the synonym can be used in WorkZone Client and Captia Web Client.
7. Click **Database** > **Save**.

Delete or disable keywords and synonyms

You can delete existing keywords and synonyms.

This function has very extensive effects. When you delete an entry from the dictionary, then:

- It is removed from the dictionary
- All occurrences are removed from entities in WorkZone Client and Captia Web Client such as cases and documents.

delete keywords or synonyms

As an example, you want to remove the word `PESTICIDE` from the dictionary. It has been registered on several cases and documents.

1. Click **Categories** > **Dictionary**.
2. Click the left most column of the entry you want to delete. The row is highlighted.
3. Click **Edit** > **Delete Row**.

If the entry is in use in WorkZone Client or Captia Web Client, a message displays: "Do you want to delete the keyword '<keyword>' and the <nn references to it?"

4. Click **OK** to accept. The row disappears.
5. Click **Database** > **Save**. The entry (and its references in WorkZone Client or Captia Web Client) have been removed.

disable keywords/synonyms

If you wish to keep its references but discontinue any future use, you should use the disable the keyword or synonym.

1. Click **Categories** > **Dictionary**.
2. Clear the **Enabled** check box of the entry you want to discontinue.
3. Place the cursor in another cell and Click **Database** > **Save**. The entry is disabled from active use in WorkZone Client and Captia Web Client, but its previous references are kept.

The Register Security Module

The **Register Security** module manages the permissions of WorkZone users' access to tables and registers of the system database.

Click **Security in** > **Register Security** to open the module.

See also Restriction of user permissions.

About Register Security

The module **Register Security** is part of the WorkZone security system. The purpose is to assign the proper permissions to the WorkZone users.

Prerequisite

The prerequisite for gaining access to the **Register Security** module is the access code **DATAADM**.

Security Codes

The WorkZone Security System is based on 10 security c Codes: 1, 2, 3, 4, 5, 6, 7, 8, 9, and 10. For each of these security codes, the system administrator must configure a set of permissions for every register and table of the system.

Only security codes 1 through 9 are used by WorkZone Client and Captia Web Client end users. Security code 10 is exclusively for the use of KMD technicians.

Permissions

You can configure 4 permissions with regard to each security code. They are:

- **Search** = permission to find and view information in the database.
- **Update** = permission to edit and change existing information in the database.
- **Insert** = permission to create new entries or new entities in the database.
- **Delete** = permission to delete entries or entities in the database.

For the file and contact registers you can configure two more permissions:

- **Lock** = permission to terminate cases and contacts.
- **Unlock** = permission to unlock cases and contacts that have been terminated.

See also Permissions.

Permissions per register

The system administrator must define which permissions are assigned to each security code in the registers and tables of the database.

Permissions per table

Some registers consist of several tables, such as the `File` register, the `Record` register, and the `Contact` register (containing the cases, documents and contacts).

The permissions of the security codes on the table level may deviate from the permissions on the register level. Consequently a security code with few permissions may have more or extended permissions with regard to one or several of the register's tables.

See also Registers and tables.

Groups of users

The permissions of each security code can be configured to reflect the demands of specific groups of users. When a user logs on to Captia Web Client, the security code assigned to the user defines what the user is allowed to do.

Active Directory - AD

You can assign security codes to users in Active Directory (AD). When a WorkZone user is created in AD, the user must be made a member of a distribution group, representing one of the security codes. When the user's relevant AD information is transferred to the WorkZone Content Serverdatabase, the user is automatically allocated the correct security code and the corresponding permissions for registers and tables in the database.

Resetting of the IIS Admin service

If you change the configuration of security, you must reset the IIS Admin Service before your changes take effect.

For more general information about resetting the IIS, see Important notes on usage.

Restriction of user permissions

Despite a user's high security code and extensive access code profile, it is possible to restrict an individual user's access to the system with regard to **Case Permissions**, **Organizational Permissions** and **Contact Permissions**.

See also Restrictions of user permissions.

Register security meta data

In the **Register Security** module you can configure the security codes (1-10). Each security code is assigned permissions to execute the types of transactions necessary. You can assign the following transaction types (for example, permissions) to the security codes: Search, Update, Insert, Delete, Lock, Unlock.

Column	Description
Name	The name of the registers or tables.
Type	In this column you will find the following values: • **Main** - Primary table, for example the main register itself. • **Parent** - A table which has one or more child tables. • **Child** - Sub table.

Column	Description
	• **Extension** - Extension to a table. • **Text** - Description.
Description	A description of the contents of a table or register.
Security Code	The system has 10 Security Codes. Codes 1 through 9 are assigned to the end-users of for example WorkZone Client and Captia Web Client. Code 10 is reserved for the KMD technicians. Security codes cannot be added or removed.
Search	Search is by default enabled for all users. Without this permission the user would not be able to see anything in the system.
Update	To edit existing information the users must have this permission.
Insert	To create new entities such as cases in the database the users must have this permission.
Delete	To delete entities the user must have this permission.
Lock	This permission allows the users to terminate cases or contacts in WorkZone Client and Captia Web Client.
Unlock	This permission allows the users to unlock cases or contacts in WorkZone Client and Captia Web Client.

See also Permissions.

Permissions for registers and tables

In the **Register Security** module you can configure the user permissions for registers and tables. Configure the registers and tables in this order:

1. Configure the permissions on register level. When you save the configuration of the registers, this configuration is passed on to the register's tables.
2. Adjust the individual tables if they need to deviate from the configuration of the register.

Example

If, for example, Security Code 6 should have all permissions in the tables of the register File (case), except the permission to delete the File (case) itself, the procedure would be as follows:

1. Assign all permissions to Security Code 6 in the register named **File**.
2. Remove the Delete permission in the table with the name **File** and type **Main**.

   Security Code 6 users now have all the permissions in all tables of the register **File**. However, they do not have the Delete Permission for the primary table. In other words they cannot delete files, for example cases.

For information on the four (plus two additional) permissions you can configure, see Permissions.

configure registers

1. Click **Security** >**Register Security**.
2. In the **Known Registers** pane on the left, select the register you want to configure.
3. Click in the left most cell of the register. All the tables of the selected register are displayed **Tables in register** panel to the right. The security settings of the register itself are displayed in the lower right **Security settings for all tables in register** panel.
4. Select the check boxes to add permissions or clear the check boxes to remove permissions.
5. Place the cursor in another cell and click **Database** > **Save**.

When your register's configuration is saved, its configuration is passed on to the tables of the entire register. You can always adjust the tables individually, if they must deviate from the default setting of the register.

configure tables

1. In the upper right **Tables in register: <table name>** panel, select the table you want to configure.
2. Click the left most cell of the table. The security settings of the table are displayed in the lower right panel.
3. Select the check boxes to add permissions or clear the check boxes to remove permissions.
4. Place the cursor in another cell and click **Database** > **Save**.

Resetting of the IIS Admin service

If you change the configuration of the security, you must reset the IIS Admin Service before your changes take effect.

Registers and tables

The WorkZone database is based on a set of registers. Essentially two types of registers:

- Primary registers
- Secondary registers.

A register in WorkZone is a set of tables that describe an entity such as a case (file); the data in a set of tables correspond with the data presented in the user interface in WorkZone Client and Captia Web Client. File, for instance, is a Primary register - in WorkZone Client and Captia Web Clientknown as Case. Opening the main register entity, for example the case, gives the user access to the tables that comprises the case.

Primary registers

The primary registers are the ones the end users encounter in their work on a daily basis, that is the File register, the Record register, and the Contact register (corresponding to cases, documents, and contacts in WorkZone Client and Captia Web Client).

End users

The end users are given permissions to primary registers and their tables depending on the rules and regulations their organization has to comply with. For the end users of many organizations, this means that they are not allowed the permission to delete.

System administrators

The system administrators are often given the highest security code to access all levels of the system and its registers in order to be able to maintain the systems configuration.

Secondary registers

Secondary registers supply basic information for the primary registers. The secondary registers are characterized by data that is rarely changed. If they need to be adjusted this is a job for the WorkZone Configuration Management system administrators. As an example this could be maintenance of Custom domain, Custom label, Classification Scheme, or simply adding a new country to Countries and Post codes, and so on.

End users

The end users must have Search permissions to all registers to be able to find and view information from the secondary registers.

System administrators

The system administrators are usually given the highest security code to access all levels of the system and its registers in order to be able to maintain the systems configuration.

Permissions

Below is a description of the four permissions. There is a big difference between permissions granted a register or a table. If you, for instance, have delete permissions in the table containing contacts attached to cases, you are able to remove unwanted contacts from cases. However, if you have deleted permissions for the case register itself, you can delete an entire case.

Permissions

The four permissions you can configure with regard to each security code are:

- **Search** - permission to find and view information in a register or a table.
- **Update** - permission to edit and change existing information in a register or table.
- **Insert** - permission to create new entities in a register or table.
- **Delete** - permission to delete entries or entities in a register or table.

Two additional permissions

The registers **Contact** and **File** have two additional permissions that can be configured. You can configure each security code with regard to:

- **Lock** - permission to terminate a contact or a file (i.e. a contact or a case in WorkZone Client and Captia Web Client).
- **Unlock** - permission to reopen the use of a contact or reopen a file.

In the following, the File register is used as an example.

Search permission

With a default configuration all security codes are permitted to search in all registers and tables. If this were not the case the users would not be able to find or view any information in any registers or tables.

Update permission

Users who need to edit existing data must be assigned a security code with this permission.

In tables of the type **Main**, all users are permitted to edit existing data and to enter information in empty fields. In WorkZone Client and Captia Web Client, the information contained in the main table is displayed, for example in the details page of cases.

The main table is the register itself viewed as a table.

In tables of the type **Child**, the users are permitted to edit all existing data. But the users are not allowed to add new data. To do this, the users must have insert permission. The user will not be able to add a new contact to a case in WorkZone Client or Captia Web Client with the update permission alone.

Insert permission

In tables of the type **Main** all users are permitted to create new entries in the register. This means that the users have permission, for instance, to create new cases in WorkZone Client and Captia Web Client.

In tables of the type **Child** the users are permitted to insert new lines of information. This means that the users have permission, for example, to add new contacts to a case in WorkZone Client and Captia Web Client.

Even though the user does not have insert permission to tables of the type main, it is important that the user has "insert" permissions to the tables of the type Child. Otherwise the users are not allowed to attach contacts, document etc. to cases. Actually both "insert" and "delete" permissions for tables of the type child should be assigned to the users if they cannot maintain important case information, for example, adding and removing contacts.

Delete permission

In tables of the type **Main** permission to delete is *not recommended*. If the user has permission to delete here, that is in the register itself, then the user is permitted to delete entire entries in the register. In WorkZone Client and Captia Web Client, for instance, this means that the user is permitted to delete an entire case.

In tables of the type **Child**, the users are permitted to delete lines of information. This means that the users have permission, for example, to delete contacts from a case in WorkZone Client and Captia Web Client.

By default users must have delete permissions to tables type child in order to maintain files, records and contacts (for example cases, documents and contacts in Captia Web Client) efficiently.

Lock and unlock permissions

The registers Contact and File (cases) are supplied with two additional permissions, "lock" and "unlock". With these two permissions users are allowed to terminate and/or reopen entities.

On the WorkZone Client and Captia Web Client case details pages it is possible to terminate and reopen a case if the user's Security Code is configured to contain the permissions "lock" and "unlock". The same applies to contacts.

The Diagnostic Module

The diagnostic module manages tools for tracing activities of the WorkZone Configuration Management.

The diagnostic module is started when you log on to WorkZone Configuration Management. The module starts tracing and logging the activities of the program at once. The tracing is terminated and the log erased when you close the program.

Click **Diagnostic** > **Trace Output** or **Enable sjDebug** to open the module.

Prerequisites for managing diagnostics

The prerequisite for gaining access to the **Trace Output** module is the access code **DIAGADM**.

No access code is needed for **Enable sjDebug**.

Export trace log

You can export the log containing trace information. Do this in order to document events if you encounter errors in the program. You can send the file containing the log to KMD for further scrutiny and diagnosis.

export trace output log

1. Click **Diagnostics** > **Trace Output**.
2. Click **File** > **Export**. The **Save Diagnostic** dialog is displayed. By default the file name `SysadmDiagnostic` is suggested. The file can only be saved as a text file (*.txt).
3. Click **Save**.

Enable sjDebug output

If you need to document errors in the WorkZone Configuration Management, you can also use **sjDebug**. When you apply **sjDebug**, all program transactions are traced by **sjDebug**.

Prerequisite:

Before you can enable sjDebug output, sjDebug must be running. If you do not know how to initiate this program contact your technical system administrator in charge of your WorkZone installation.

Two possible scenarios:

- You are aware of a problem in WorkZone Configuration Management. Start **sjDebug** before logging on to WorkZone Configuration Management.
- You encounter a problem while working in WorkZone Configuration Management. Start **sjDebug** and enable **sjDebug** output.

Start sjDebug

1. Logon to the server where WorkZone Configuration Management is installed.
2. Click **Start** > **Run**.
3. Enter **sjDebug** into the field and click **OK**.
4. When prompted for password enter **scanj**.

Trace output meta data

The Trace Output will display a panel with the following columns:

Column	Description
Time	Time of transaction
Module	Module that was active

Column	Description
Component	Program component that was involved
Method	Function
Text	Description

Operation

The Owner Module

The **Owner** is the organization that has purchased the right to use for the WorkZone system.

The **Owner** module manages information regarding ownership and central information about the system's configuration. This configuration is global, i.e., it applies to the entire system.

Be careful not to change your configuration once it has been implemented! Some configuration, such as Case number, hide/show access codes should not be changed once they have been initiated. Changes during a production period may affect searches and archiving results, and so on.

Some configurations, however, may be overridden locally in the WorkZone system; as an example the global configuration of the case number format can be overridden in the classification scheme on an individual class level by the employment of a specific mask.

Prerequisites for managing Owner

The prerequisite for gaining access to the **Owner** module is the access code **USERADM**.

Click **Operation** > **Owner** to open the module.

Owner meta data

In the **Owner** module you can manage information about your organization and the configuration of the WorkZone system.

The **Owner** module consists of a number of sections where you can register the following information:

Cell	Description
Name	Enter the name of the organization using the current installation.
Address	Enter the address of the organization mentioned above.
City	Enter the post code in the first field. Press **Tab** and the postal district is automatically filled into the adjacent field. Post code must be configured in the **Countries and Postcodes** module.
Country	Enter the country code in the first field. Press **Tab** and the name of the country is automatically filled into the adjacent field. Country codes must be configured in the module **Countries and Postcodes**.
Phone	Enter the phone number of your organization.
CVR-NR	Enter the CVR number, that is the central business registration number of your organization. CVR no. is a Danish Central Business Registration Number.

Cell	Description
	It is important that you enter the CVR no. correctly (8 digits) because it is a prerequisite for the employment of eDeliverynote (e-følgeseddel).
Access Code Visibility	
Hide Organizational Access Codes	Check box with two options: • Cleared check box - organizational access codes are in use. • Selected check box - organizational access codes are hidden. Organizational access codes (i.e. unit access codes). By default the check boxes are cleared. If Corporate Access Codes are employed, hiding is not an option. Only users with the AFDADM and STJERNEADM access codes have the rights to set the **Hide Organizational Access Codes** check box.
Hide Employee Access Codes	Check box with two options: • Selected check box - employee access codes are in use. • Cleared check box - employee access codes are hidden. Employee access codes (i.e. user access codes). By default the check boxes are cleared. If Corporate Access Codes are employed, hiding is not an option. Only users with the MEDARBADM and STJERNEADM access codes have the rights to set the **Hide Employee Access Codes** check box.
Dictionary	
In use	Check box with two options:

Cell	Description
	• Cleared check box - the dictionary is disabled. Entered words are not validated but accepted. • Selected check box - the dictionary is enabled. Entries from the dictionary must be used as keywords. The words are validated. If a keyword is not in the dictionary (and enabled), it is rejected.
Illegal characters	Characters entered in this box will be rejected if they are entered in the dictionary.
Minimum length	Indicates the minimum length of an entry in the Dictionary.
Other sections	
Group Language	Select culture code from the drop-down box. The selected language will be the default language of WorkZone Client and Captia Web Client.
Case Number Format	Enter the default case number format for the system.
Record Access Rights	Check box with two options: • Cleared check box - Record Access Rights module is disabled. • Selected check box - Record Access Rights module is enabled.

The information of the **Culture Settings** tab:

Cell	Description
Culture Name	Languages, for example: • da-DK (= Denmark) • en-GB (= Great Britain) The culture name is set up during the installation of the language pack and cannot be edited by users.

<table>
<tr><th>Cell</th><th>Description</th></tr>
<tr><td>Date Pattern</td><td>A mask defining the way dates are formatted for the culture selected - for example:
dd-MM-yyyy HH:mm:ss
MM-dd-yyyy HH:mm:ss
<table><tr><td>dd</td><td>day</td></tr><tr><td>MM</td><td>month</td></tr><tr><td>yyyy</td><td>year</td></tr><tr><td>HH</td><td>hour</td></tr><tr><td>mm</td><td>minute</td></tr><tr><td>ss</td><td>second</td></tr></table>Changes to this cell will influence all date fields in the system.</td></tr>
<tr><td>Culture Code</td><td>Culture codes, for example:
1030 (= da-DK)
1033 (= en-GB)</td></tr>
<tr><td>Activated</td><td>The day the date pattern is activated. The date is set at installation of the language pack and cannot be edited by users.</td></tr>
<tr><td>Deactivated</td><td>The day the date pattern is deactivated. The date is set at installation of the language pack and cannot be edited by users.</td></tr>
</table>

Hide or show access codes

Users and organizational units are maintained in AD (Active Directory). They are replicated to the WorkZone database at intervals.

SJ Active Directory Connector transfers data from AD to the WorkZone database, for example users and organizational units as well as access codes. Access codes are used for regulating read/write rights to cases and documents.

By default, access codes for both users and organizational units are available for use. However if these access codes are not wanted or disruptive for efficient use of Captia Web Client, they can be hidden.

You can hide access codes for both users and organizational units. This is done if they are not to be used. You decide whether both or just one of them are to be hidden or employed.

hide access codes

1. Click **Operation** ▸ **Owner**. The **Access Code Visibility** section contains the options that determines if access codes are hidden or visible:

   - **Hide Organizational Access Codes** (i.e. unit access codes).

     Only users with the AFDADM and STJERNEADM access codes have the rights to set the **Hide Organizational Access Codes** check box.

   - **Hide Employee Access Codes** (i.e. user access codes).

     Only users with the MEDARBADM and STJERNEADM access codes have the rights to set the **Hide Employee Access Codes** check box.

2. Select the check boxes to hide the access codes or clear the check boxes to show the access codes.
3. Place the cursor in another field and click **Database** > **Save**.

   The program must be restarted to activate the configuration.

By default check boxes are cleared. If Corporate Access Codes are deployed, hiding is not an option.

See also Owner meta data - Hide Employee Access Codes.

Enable or disable record access rights

The purpose of this configuration is to enable or disable **Record Access** in WorkZone Client and Captia Web Client altogether. This is done with the check box field **Enabled** in the **Record Access Rights** section.

enable record access rights

1. Click **Operation** > **Owner**.
2. In the **Record Access Rights** section, select the **Enabled** check box to enable record access or clear the check to disable it.
3. Place the cursor in another field and click **Database** > **Save**.

By default the record access is disabled (the check box is cleared).

Configure the dictionary

The basic configuration of the dictionary is done in the **Dictionary** section in the **Owner** module.

Enable or disable the dictionary

1. Click **Operation** > **Owner**.
2. On the **Owner Settings** tab, select the **In use** check box field in the **Dictionary** section to enable the dictionary or clear the check box to disable the dictionary.

- Dictionary is enabled - the check box is selected.
 All keywords and synonyms must preexist in the dictionary. When you register keywords on, for example, cases in WorkZone Client or Captia Web Client, the words are validated against the dictionary. If they do not exist in the dictionary (or the keywords are disabled), they are rejected.
- Dictionary is disabled - the check box is cleared.
In WorkZone Client and Captia Web Client, the users can both register keywords at will and register keywords from the dictionary. There is no validation.

A message displays saying: "You must restart before this change has any effect."

1. Place the cursor in another cell and click **Database** > **Save**.
2. Restart WorkZone Client or Captia Web Client and WorkZone Configuration Management to activate the changed configuration.

Illegal characters

In **Illegal characters** field, you can register characters that are not allowed in keywords in the dictionary. If you try to enter illegal characters, they will be rejected, that is the word will not be accepted.

Minimum length

The number registered in **Minimum length** field defines the minimum length of an accepted keyword. If you enter a keyword with fewer characters, it will be rejected.

Configure group language

In the **Group Language** section you can select the default user interface language of WorkZone Client and Captia Web Client. When the users log on to clients, all labels, drop-down lists, classification scheme, and so on, in the user interface are displayed in the selected language.

The field contains a drop-down box. You must select the culture code of the default language.

Configure default language

1. Click **Operation** > **Owner**.
2. In the **Group Language** section, select the culture code for the default language from the list.
3. Place the cursor in another field and click **Database** > **Save**.
4. Restart the program to activate the configuration.

See also Language mode and Group Language.

Configure date pattern

You can configure the date pattern for each culture implemented in WorkZone Client and Captia Web Client. The configuration is set up in the module **Owner** and is globally effective but you can deviate from this configuration. In the **User** module you can define an individual date pattern for each user and thereby deviating from the global configuration.

You enter the date patterns on the **Culture settings** tab in the **Owner** module.

1. Click **Operation** > **Owner**.
2. Click the **Culture Settings** tab. The cultures installed are displayed.
3. Click in the **Date Pattern** cell.
4. Enter the date pattern for the culture, for example, the Danish date pattern da-DK: dd-MM-yyyy HH:mm:ss
5. Place the cursor in another field and click **Database** > **Save**.

When a culture specific date format is to be specified, the following subset of the .NET way of specifying the format is used:

Format specifier	Description
`dd`	The day of the month. Single-digit days will be preceded by a zero.
`HH`	The hour in a 24-hour clock. Single-digit hours will be preceded by a zero.
`mm`	The minute. Single-digit minutes will be preceded by a zero.
`MM`	The numeric month. Single-digit months will be preceded by a zero.
`ss`	The second. Single-digit seconds will be preceded by a zero.
`yy`	The year in two digits.
`yyyy`	The year in four digits.

The following separators are valid for separating the parts of the date format:

Separator	Description
" "	A space.
.	A period.
-	A hyphen.
:	A colon.
/	A slash.

Configure draft versioning

In the **Draft Versioning** section, you can enable/disable version control of drafts. Versioning applies to documents with the state UÅ (Draft) or UP (Personal draft). By default draft versioning is enabled and a maximum of 100 old versions are kept for any document. Note that new documents are not automatically put under version control unless you specify it.

Enable and configure draft versioning

1. Click **Operation** > **Owner** and go to the **Draft Versioning** section.
2. To enable draft versioning, select the **Enable draft versioning** check box.
3. If you have enabled draft versioning, you can choose to:
    - **Keep all versions -** Keeps all versions of the drafts.
    - **Keep number of versions as set in 'Version limit' -** If you select this option, specify a limit in the **Version limit** field. The system keeps the number of drafts specified in the **Version limit** field. If the limit is exceeded, the oldest versions are deleted automatically.

   If you change the version limit, it takes effect next time a document is changed.

4. Select the **Apply draft versioning automatically to new drafts** check box to apply automatically version control to new drafts.
5. Place the cursor in another field and click **Database** > **Save** to save the configuration.
6. Reset the IIS on all web servers to activate the configuration.

Apply versioning control to cases in a class

You can apply versioning control to cases in a specific class, see Classification Scheme - Apply draft versioning. This means that documents created on these cases have versioning control applied automatically.

Case number format

About case number formats

Cases are identified by a number - the case number. The case number can be constructed in different ways, for instance:

- 2009-00001, i.e. year-sequence number,
- 2009-1312/175-0001, i.e. year-class/subnumber-sequence number.

Global configuration

Configuration of the case number is done in the **Owner** module in the **Case Number Format** field. You must enter a global mask for the case number in a special format - for instance **`aaaa.gggg(/uuuu)-LLLL`**.

In this mask, the letters used mean the following:

- **a** is the year, i.e. aaaa is automatically converted into a four digit year - 2013.
- **g** is the class, i.e. gggg means that the maximum length of the class is four characters.
- **u** is the subnumber, i.e. uuuu, the maximum length of the subnumber is four characters (/if it applies to the class).
- **L** is a sequence number, i.e. LLLL, a four digit number, e.g. 0034 (the capital L signifies that the sequence number i fixed, always 4 digits preceded by zeros when the number is lower than 4 digits, e.g. LLLL = 0034).

This is an example of a case number mask. The case number mask you enter applies globally, i.e. to the entire WorkZone system.

Local configuration

You can deviate from the global configuration by configuring the case number format for individual classes. This is done in the **Classification Scheme** module.

In the **Classification Scheme** module, you might for instance have a class reserved for personnel files. You could, for example, configure this class to be a CPR-number and in this way, deviate from the global case number format, for example a mask such as cccc-cccc/LLLL = 180562-5903/0034.

See also Mask.

Manual case number

It is also possible to number cases manually. If necessary, it is possible to set up classes to prompt for a manually entered case number at case creation. This is configured in the **Classification Scheme**, see Free Case Number.

The sequence number of the case number

When you create a new case, the case is automatically allocated a sequence number. If the global case number mask does not include **g** = class or **u** = subnumber, you must enter a hash (#) symbol in the case number mask, for example #aaaa-LLLLLL. The sequence number is automatically generated when you use the hash symbol (#).

When you add the hash symbol (#) in front of the sequence number, the sequence number is automatically reset when the year changes and a new one is created.

parallel case creation

To ensure scalability of parallel creation of cases, case numbers are not created in consecutive order without holes. In rare situations a case number may be skipped, for example when attempts to create a case with invalid data fail due to the transaction being rolled back. In this case, a log that lists skipped case numbers is created. The log is placed in the file_numbering_error table and is also available through the register named file_numbering_error (OData: FileNumberingErrors). Consult the log if you suspect that a case has been lost. The log shows if the case was never created.

Create case number format

Here you can read how to create or edit the case number format of the company.

How to format a global case number

1. Click **Operation** > **Owner**.
2. Click in the **Case Number Format** field.
3. Enter or edit the case number mask.
4. Click **Database** > **Save**.

See also About case number mask components.

About the case number mask

In the **Case Number Format** section, you must enter a case number mask. The global case number mask defines the way that the case number is formatted at case creation.

The case number format entered here applies globally for all cases created, except for classes with individual case number masks, see Mask.

The components of the case number

The global case number mask can be constructed of a number of different components, which are described below.

Information	Description
Number of characters	The case number can contain up to 30 characters including punctuation marks and blank spaces.
Meta data	In the table below is listed the components of which the case number can consist. Components permitted are meta data and a sequence number. Furthermore, you can see which characters you must enter to include the different components in the case number mask:

Information	Description	
	Character	**Description**
	a	**Year** - you can enter **2** or **4** characters: • 4 characters, a 4 digit year is used, • 2 characters, the last 2 digits of the year are used.
	g	**Class** - from the classification scheme - contained in the **Classification Scheme** module. For example, enter **gggg** if the class consists of up to 4 digits.
	s	**Responsible organizational unit** - contact codes belonging to contact type A. For example, enter **sssss** if the contact codes of responsible organizational units consists of up to 5 digits.
	t	**Case type** - domain items belonging to domain type case type in **Custom domain** module. For example, enter **ttt** if the class type can consist of up to 3 digits.
	u	**Subnumber** - subnumbers belonging to the **Subnumbers** module. For example, enter **uuuu** if the subnumbers consists of up to 4 digits.
	L or l	**Sequence number** - a capital L signifies that the format of the sequence number is fixed - always the same number of digits and that the digits will be preceded by zeros when the number is lower than the allocated Ls. A lower case **l** signifies that the format for the sequence of the sequence number is variable. See Sequence number format.
	c	**CPR-number** - which is the Danish personal identification number.

<table>
<tr><th>Information</th><th>Description</th></tr>
<tr><td></td><td>
<table>
<tr><th>Character</th><th>Description</th></tr>
<tr><td></td><td>It is a ten-digit number with the format DDMMYY-SSSS, where DDMMYY is the date of birth and SSSS is a sequence number. The first digit of the sequence number encodes the century of birth (so that centenarians are distinguished from infants), and the last digit of the sequence number is odd for males and even for females.

This case number format is normally used locally for the class in the classification scheme used for registering personnel files for individual employees.</td></tr>
<tr><td>z</td><td>Used for case number masks for fictitious CPR numbers.

This case number format is normally used locally for the class in the classification scheme used for registering dossiers for individual persons - persons without an officially generated CPR-number. The format is zzzzzz-zzzz.

This feature requires that the case details page is customized.</td></tr>
</table>
</td></tr>
<tr><td>Sequence number format</td><td>You can define whether the sequence number is to be created with a fixed or a variable format.

Fixed format

Upper-case signifies a fixed format of the sequence number. The sequence number of the case number is designed to have a fixed number of digits.

If the sequence number, for instance, is defined as 4 capital letters such as LLLL. The sequence number of the first case created is 0001.

If, for example, the case number mask is defined as: aaaa-gggg-LLLL. Then the case number for a specific case could be 2009-1380-0004.

Variable format

Lower-case letters signify a variable format. The sequence number of a case number is designed to have only the necessary number of digits.</td></tr>
</table>

<table>
<tr><th>Information</th><th>Description</th></tr>
<tr><td></td><td> If the sequence number, for instance, is defined as 4 lower-case letters such as llll. The sequence number of the first case created is 1. If for example the case number mask is defined as: aaaa-gggg-llll. The case number for the same case would be 2009-1380-4. </td></tr>
<tr><td>Number of characters</td><td> The number of characters in the global case number mask depends on how many digits (or characters) each part of the case number is made up of. The upper limit for the whole case number is 30 characters. Note that punctuation marks and blank spaces are included. </td></tr>
<tr><td>Punctuation marks</td><td> The following punctuation marks can be used to separate the different parts of the case number: - - hyphen / - slash . - full stop </td></tr>
<tr><td>Conditional information</td><td> Brackets around part of the case number mask signifies that this particular part is only included, when the requirements described below are met: A subnumber is required by the class selected for the case. Mandatory subnumbers can be defined for specific classes in the classification scheme. For instance, the case number mask designed as aaaa-gggg(/uuuu)-LLLL will, for instance, generates the following case numbers:
If subnumbers are mandatory for class 3720, the case number will be formatted like this: 2009-3720/AAA-0001.
If subnumbers are not defined for class 2650, the case number will be formatted like this: 2009-2650-0001.
The value specified in the mask is case metadata, and must be entered before the case number can be created. Case metadata is case type and responsible organisational unit. This case number mask (#tttttt-) for instance, will generate the following case numbers:</td></tr>
</table>

<table>
<tr><th>Information</th><th>Description</th></tr>
<tr><td></td><td>

If case type ABC is entered on the case, the case number will be ABC-1380-0001.
If no case type is entered, the case number will be 1380-0001.

<h3>Mandatory requirements for the classification scheme</h3>
In the classification scheme, the check box in the cell Fixed SubNumber must be selected, and a value selected in the cell Sub-number type. The value selected defines what domain of sub numbers is attached to the class.
</td></tr>
<tr><td>Information controlling the sequence number</td><td>
To make a separate part of the case number influence how the sequence number is generated, you must use the hash (#) symbol in the case number mask. The hash (#) symbol can be applied in two different ways, with two different results:

Disable default numbering method
If you place a hash (#) symbol in front of default case number information, i.e. class and sub number, the default numbering will be disabled. This means that class and sub number have no influence on the sequence number, which will be generated as a global sequence number. This mask, for example #gggg-#uuuu-LLLLLL, generates the following case numbers: 3270-AAA-000001, 3270-BBBB-000002, 3270-AAA-000003, etc.
Enable special numbering method
You can place a hash (#) symbol in front of responsible organisational unit and case type. This will cause the generation of the sequence number to take this part of the case number into account. For instance, gggg-uuu-#tttt-LLL - the case mask includes case type with a hash (#) symbol. The creation of the sequence number is controlled by the class, the subnumber and the case type selected.

<h3>Default sequence number</h3>
</td></tr>
</table>

Information	Description
	By default, primarily the class and secondarily the sub number control how the sequence number is generated. If the case number mask only contains class information, e.g. gggg-LLLL, each class will have its own series of sequence numbers. If the case number mask contains both class and sub number, for example gggg/uuuu-LLLL, each combination of class and subnumber will have its own series of sequence numbers.
Fixed information	You can include fixed information in the case number mask. Fixed information can be inserted into the case number mask in the following ways: • Characters in square brackets **[]** are inserted directly into the case number. If the case number mask, for instance, is designed as **[AMA]-gggg-LLLL**, the case number is created like this AMA-1312-0001. • Characters entered like this **!<characters>** are inserted directly into the case number. If the case number mask, for example, is designed as **gggg-!<AMA>-LLLL**, the case number will be created like this 1312-AMA-0001.

About case number mask components

Below is a description of the different components of the case numbers.

Case number length

The case number can be up to 30 characters long. All components are taken into account even separators.

Case number components

Below are the default components of the case number mask:

Information	Description
g	**Case class** - the classification scheme.
u	**Subnumber** - supplementary to the classification scheme.
L or l	Sequence number entered as an L or l. See Sequence number below.
a	Year - 2 or 4 digits, i.e. aa or aaa.
s	Organizational unit.
t	Case type.
C or Z	CPR number - 6-4 characters.
!<character>	!<character> is not interpreted.
[ ]	Characters in [ ] are not interpreted.
( )	Characters in ( )brackets are only included if required by the class - see Fixed Subnumber. Characters in brackets see Conditional information below.

Sequence number

Fixed length	Upper case L's, for example LLLL, means that the sequence number has a fixed length. The first case created gets sequence number 0001.
Variable length	Lower case l's, for example llll, means that the sequence number has a variable length. The first case created gets sequence number 1.

Separators

You can use the following characters as separators between groups of information:

- = hyphen,

/ = slash, and

. = period.

Conditional information

Brackets means that the information inside the brackets is included in the case number when one of the following conditions is fulfilled:

- When the information is transferred from the classification scheme.
- When the information exists in the case details page.

The Users Module

In the **Users** module you can manage information concerning the user with regard to security, date formats, culture and entity permissions.

Users are created and maintained in AD (Active Directory). They are transferred to the WorkZone Content Server database with the WorkZone replication program via a scheduled task. In WorkZone Configuration Management, you can adjust the privileges of the individual users concerning the maintenance of data in Captia Web Client.

Prerequisites for managing Users

The prerequisite for gaining access to the **Users** module is the access code **USERADM**.

Click **Operations** > **Users** to open the module.

Users meta data

Cell	Description
Name	The unique ID of the user.
Full Name	The full name of the current user.
Number	The current user's user-number. This number is, for example, used in the **Use Log** module. Each row of information is started with the user number. This way you can find out who has done what in the database.

Cell	Description
SID	The Microsoft **S**ecurity **Id**entification. The SID is a unique alphanumeric row of digits identifying each operating system and each user in the network.
Security	The security code allocated the current user (the code is a number between 1 and 9.) The security code defines the database authorization of the user. It represents what the user is allowed to do in each register in the WorkZone Content Server database, for example, whether the user is allowed to search, update, create or delete cases. The authority granted the security codes are defined in the **Register security** module. In this module, you define the rights granted each security code level with regard to each register and table. In Active Directory (AD), there are 9 distribution groups corresponding to each of the security codes. In AD, the users must be members of at least one of these distribution groups to be able to work in WorkZone programs.
Date Format	If the cell is empty, the date format used is the format configured in the **Owner** module on the **Culture settings** tab. In this cell you can enter a date format pattern. It determines the way dates are displayed in Captia Web Client for the current user, for example `dd-MM-yyyy HH:mm:ss` See also Date patterns.
Culture	The cell shows what language the users has chosen as default language in Captia Web Client.
Configuration	Displays when the current user has initiated an update in the user's configuration in user_configuration. This happens when the user adjusts the set up in the Captia Web Client interface, for example when the user configures menus, lists etc.
Universal access	Select **Ja** from the drop-down list to assign universal access to the user. Universal access means that the user has unlimited access to all cases and documents. The user is not subject to access code control. Only users with the access codes MEDARBADM and STJERNEADM have the rights to assign universal access to users.

Restriction of user permission

There are three panels where you can specify certain aspects of the permissions of the individual user. These are the **Case Permissions**, the **Organizational Permissions**, and the **Contact Permissions**. As long as these panels are not filled in, the users is not limited in these areas. As soon as you fill in something in one of the panels, the user's rights are restricted to the area defined in the panel.

If, for example, in the **Organizational Permissions** you enter a specific organizational unit and the permission *record,* the current user is exclusively restricted to creating and maintaining documents with the specified unit as responsible unit.

Case permission

<table>
<tr><td>Case Class</td><td>The function of the panel:
If the panel empty, the user is permitted to create and update cases and their documents no matter the case class (naturally in accordance with the user's security code and access codes).
If one or more rows of data are entered the user is restricted to creating and maintaining cases and documents belonging to the case classes registered here.
In this cell you can select:
one case class per row,
as many rows as needed
a specific class, for example, 3230, Sand and rubble, or
a value indicating a hierarchy entity, for example 32 (all classes beginning with 32).</td></tr>
<tr><td>Permission</td><td>Select the value from the drop-down box belonging to the cell.
The value entered in this cell defines the scope of the permissions. Is the user granted permission to:
Case - only cases,</td></tr>
</table>

	• **Record** - only documents or • **Case/Record** - both cases and documents.

Organizational permission

This panel functions like the "Case Permissions" panel.

Organizational Unit	As long as the panel is empty, the user is subject to no restrictions. As soon as you enter an organizational unit and permissions, the users freedom of action concerning creating and maintaining entities is severely limited. The cell contains a drop-down box. Select an organizational unit to which the user's authority is to be restricted.
Permission	Select the restriction you want to impose on the users from the list box. The user is allowed to create and maintain • **Case** - only cases, • **Record** - only documents or • **Case/Record** - both cases and documents.

Contact permission

In this panel, you are able to limit in which contact types the user is allowed to create and maintain contacts.

By default, "Editing allowed" is preselected for all users with a security code permitting creation and maintenance of contacts.

Contact type	The cell contains a drop-down box with contact types. Select the contact types for which the user is allowed to create and maintain contacts.
Permission	The cell contains a drop-down box. Select the value relevant for the contact type • Editing allowed (= **Redigering tilladt**). • Editing prohibited (= **Redigering ikke tilladt**).

Access codes

Access Code	In this panel, the user's **Access Code Profile** is displayed - a list of all the access codes the current user is a member of in Active Directory. The list of access codes is for display only. They cannot be edited. If additional access is needed, the users Access Code profile is updated by creating a membership in AD. Changes are then transferred between AD and the WorkZone database at regular intervals.

The Preference Profiles Module

Preference Profiles are employed by users in Captia Web Client. **Restricting Profiles** are not by default employed. Restricting profiles are only in effect with specific customization.

In the **Preference Profiles** module you can manage information regarding the configuration of profiles. Profiles are defined and created by your organization. A profile is a mask filtering out unnecessary values. The profile mirrors, for instance, a specific job function or work area.

Users can work with or without a profile in Captia Web Client. The purpose of profiles is that working on the basis of a profile, the user only see the data she needs to see. This means that when the user opens a list or a pop-up window, only values relevant for the work of the current user are displayed.

For example, the drop-down list in the **Document group** or **Case handler** fields only display the values used by the current user. If the user needs to see and perhaps to register other values, then the user can click **Show all** in the list. Then, the user can select another value.

Prerequisites for managing Preference Profiles

The prerequisite for gaining access to the **Preference profiles** module is the access code **PROFILADM**.

Before working in WorkZone Configuration Management, deselect any active profile in Captia Web Client.

Click **Operation** > **Preference Profiles** to open the module.

The Preference Profile meta data

In the table below is an overview of all the information describing a profile.

Cell	Description
Code	The code is the unique ID of the profile. You must enter a code for the profile when you create it. The maximum length is 11 characters. When you have saved the profile the cell is no longer open for editing.
Name	Enter a short and precise description of the profile in this cell. Use max. 60 characters. When you have saved the profile, the cell is no longer open for editing.
Default Case Handler	**Default case handler in Captia Web Client** Select the default case handler from the list in the field. The profile automatically inserts a default case handler when the user creates a new case in Captia Web Client.
Default Responsible OU	Select the default responsible organizational unit from the list. The profile automatically inserts a default responsible organizational unit when the user creates a new case in Captia Web Client.
Access Code	You can exclude users from using a profile. This is done by means of an access code. If an access code is entered into the cell, only users with the same access code can select the profile.
Start Date	Initiation date. If this is not entered the profile cannot be enabled.
End Date	Termination date. The profile is disabled from this date.
Tabs with basic data	In the right panel - with the heading "Profile: <Code>" - are a number of tabs. Each tab contains a set of basic data, for instance, **Custom Domains**. In this panel, you attach basic data to the profile. The profile is a kind of basket holding basic data. When the user chooses to work according to a specific profile, the user only sees the basic data specified by the profile. When the user chooses to work without a profile, all basic data is displayed in, for example, the drop-down boxes opened by the user.

Cell	Description
Custom Label	Select the custom labels that the users employing the profile need to see.
Custom Domains	Select the values of custom domains that the users employing the profile need to see.
Classification Scheme	Select the classes which the users need to see.
Facet-based Classification Scheme	Select the facets that the users need to see.
Subnumbers	Select the classes that the users need to see.
Employees	Select the employes that the users need to see - in the **Case handler** field in Captia Web Client.
Organisational Units	Select the employes which the users need to see - in the **Responsible unit** field in Captia Web Client.

Working with preference profiles

In the **Preference Profiles** module you can:

- Create new profiles.
- Edit already existing profiles.
- Disable profiles no longer in use.

Prerequisites for administering profiles

In order to maintain profiles you must have the administrator access code - **PROFILADM**.

You cannot work in the module with a profile enabled for your user in Captia Web Client. If you open WorkZone Configuration Management with a profile enabled, the following message will be displayed: "You have and active profile: <profilename>. This may cause unexpected behavior in WorkZone Configuration Management.

Working with profiles

Create a profile	First create the profile in WorkZone Configuration Management. • Give the profile an ID and a name. The name is a short and precise description containing enough information for the users to understand the scope of the profile. • Select the data necessary and sufficient for the profile to fulfill its purpose. • Enter a start date to enable the profile.
Select profile	In Captia Web Client the profile is now available for the users. When the user clicks the link to the profiles, a dialog is opened, where the user can select either a specific profile or the default profile without any restrictions.
The profile in use	When the user is employing a profile i Captia Web Client, the number of values available in drop-down lists is limited. However, the value **Show all** is available. The user can click **Show all** to see all values. All values are available for use, i.e. can be registered on, for example, the case currently displayed.

Create preference profiles

First you must create the profile and save and then attach data to it.

Create a profile

1. Click **Operation** > **Preference Profiles**.
2. Click twice in the empty cell of the **Code** column.
3. Enter a short code, which will be the ID of the profile. Maximum 11 characters long.
4. Click the **Name** cell and enter a description of the profile here. Try to include purpose and scope of the profile in this description.

5. Fill in the Default Case Handler and Default Responsible OU cells if required.
6. Fill in the Start Date cell to enable the profile.
7. Place the cursor in another cell and click **Database** > **Save**. When you have saved the profile, the **Code** and **Name** fields are locked and cannot be edited again.

create the contents of a profile

1. Click the left most cell of the profile you want to work with. The data you can attach to the profile is available in the right panel.
2. Click the tabs containing information to be included in the profile. You have two options concerning each category of information:

- All values are to be displayed:
  Select the check box at the highest level.
- Selected values are to be displayed:
  Click your way down the hierarchy to the values which should be included. Click the check boxes of value to be included.

3. When you have selected the values, click **Database** > **Save**.

Edit preference profiles

You can edit an existing profile. The left panel contains information that identifies the profile. You can edit all cells except the **Code** and **Name** cells, which are locked. In the right panel, you can edit the meta data attached to the profile.

Edit a profile

1. Click **Operation** > **Preference Profiles**.
2. Click the profile you want to edit.

3. Click the left most cell of the profile in the **Code** column. The right panel is now populated with meta data ready for editing.
4. Make the corrections as needed.
5. Place the cursor in another cell and click **Database** >**Save** to save the changes.

Delete or disable preference profiles

You can disable or delete profiles that out of date and no longer in use.

Disable a profile

1. Click **Operation** > **Preference Profiles**.
2. Click the profile you want to edit.
3. Click the cell **End Date** and select a date.
4. Click the date when the profile is to be disabled, for example today's date.
5. Place the cursor in another cell and click **Database** > **Save** to save the changes.

delete a profile

1. Click **Operation** > **Preference Profiles**.
2. Click the profile you want to edit.
3. Click the left most cell of the profile you want to delete.
4. Click **Edit** > **Delete row**.
5. Place the cursor in another cell and click **Database** >**Save** to save the changes.

About restricting profiles

Use - customization

This function is not used in a standard Captia Web Client installation. Restricting Profiles are intended for organizations with special demands. To implement the use of this module Captia Web Client must be customized.

Purpose

The purpose of the module called **Restricting Profiles** is to control the use of basic data. By means of restricting profiles you can control what basic data the users can see, select and register in Captia Web Client.

The users can not select a profile themselves. In Captia Web Client, they by default work according to the profile assigned to them by the organization.

Prerequisites for managing Restricting Profiles

The prerequisite for gaining access to the **Restricting Profiles** module is the access code **PROFILADM**.

Click **Operation** > **Restricting Profiles** to open the module.

User interface

The interface of the **Restricting Profiles** module is identical to that of the **Preference Profiles** module.

Working with the Restricting profiles module

Use the help topic concerning **Preference Profiles** module as it also apply to the **Restricting Profiles** module.

See also Preference Profiles.

The Processes Module

The **Processes** module is used to configure WorkZone Process processes. The packages that you have installed are shown in this module. You can specify the order, access, and start and end date of the processes.

Process ID	A unique identifier of the process.
Guid	The Globally Unique Identifier (GUID) of the process.
Name	The name of the process.
Version	The process version number.
Type	The type of process. Possible types are: • MAIN - Phase processes. • SUB - Processes that can run both as standalone processes and sub-processes under a main process. • CASEACT - Case activities package. • SERVICE - Service workflows. • SUBSVC - Processes that are started by service workflows. The CASEACT, SERVICE, and SUBSVC process types are not visible in the **Processes** overview.
Order	The order of the processes, which defines the display order of the processes in the **Process** menu in WorkZone Client and WorkZone for Office.
Access Code	You cannot specify this setting.
Start	The process start date. As of this date the process will be available.
End	The process end date. As of this date the process will no longer be available.
Access	Configure who can access the processes in the current environment. • ACTOR - Only the current user. • DELEGATE - The user who has access rights to WorkZone Process can

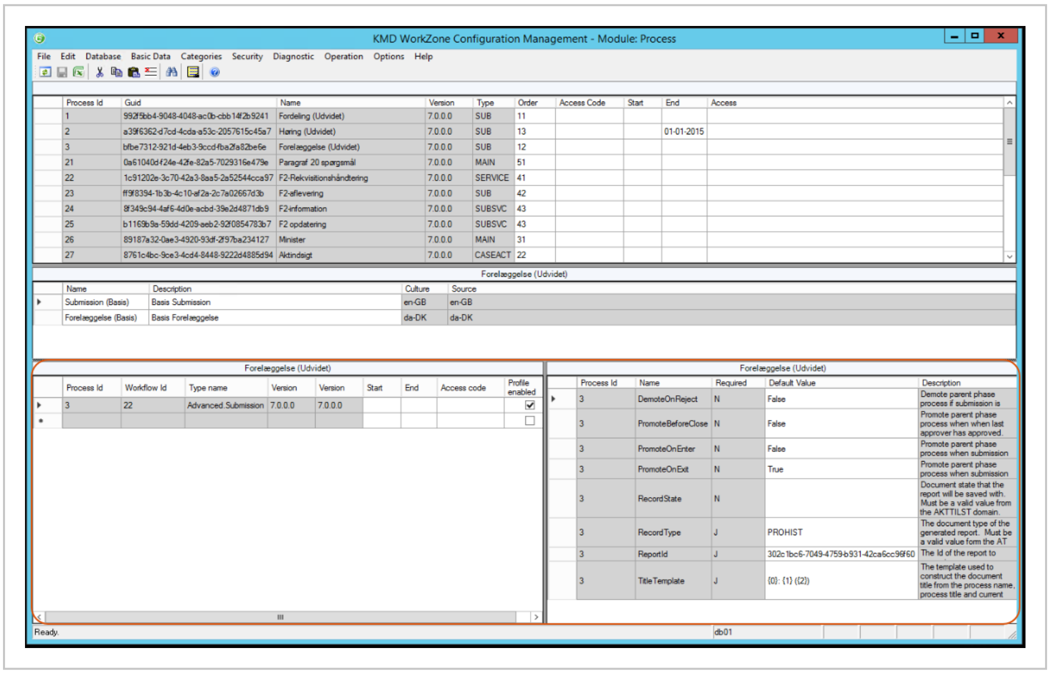
delegate access rights to another user.

- ALL - Access is not limited to a specific user.

By default this setting is not specified. The value of the **Access** setting in the is used.

Process specific settings

You can enter settings for each of the processes. Select a process and specify settings for the selected process in the lower part of the screen.



Manage process versions and access to processes

In the lower left part of the screen, you can see installed versions of a process, specify start and end date, and who should have access to the process from the **Process** menu in WorkZone Client.

Process Id	A unique identifier of the process.
Workflow Id	A unique identifier of the workflow.

Type name	The name of the process.
Version	The process version.
Start date	The process start date. As of this date the process will be available.
End date	The process end date. As of this date the process will no longer be available.
Access code	Specify who should be able to start a process from the **Process** menu in WorkZone Client and WorkZone for Office. You can enter users or organizational units. If you do not enter a value, the selected process will be available to all users in the organization.
Profile enabled	Select this check box to enable a log profile for process. See Reduce log information in the workflow log using a log profile.

Configure process specific settings

Some of the processes have specific settings that you can configure to suit an organization's specific way of working. Select a process and specify the settings for the selected process in the lower right corner.

For more information about process specific settings, see the WorkZone Process Administrator's Guide, for example the topics:

- Configure SmartPost
- Configure extended submission
- Configure a ministerial process
- Configure the history document

The Service Workflows Module

The **Service Workflow** module is used to configure service workflows in WorkZone Process. You can set up three types of service workflows:

- Mailbox Monitor
- F2 Requisition Handler

- e-Boks Message Handler
- Monitor Process

To create and configure a service flow, you need to create a new row for each of the work-flows and fill in the settings.

Name	A unique identifier of the service.
Description	A description of the service.
Process	The type of process.
Enabled	Click this check box to enable that the service is started and monitored by the Process Service Agent.
Alive check interval (minutes)	The interval in minutes between the agent checking that the service is running.
Restart interval	The interval in minutes before a new process is started and the old process is completed. This is to prevent the workflow log from piling up logging information.

See Service workflows in the WorkZone Process Administrator Guide for information about specific settings for each of the workflow types.

The Process Settings module

The **Process settings** module is used to configure WorkZone Process.

CreateProcessHistoryDocuement Setting

The settings below apply to the process history document.

Key	Default setting	Description
DocumentState	ARK	You can define a document state

Key	Default setting	Description
		for history documents generated by a specific process. Click **Operations** > **Processes**, and select a process to configure process specific settings. If the document state is neither specified for each process nor here, the ARK (Archived) state will be used as the default state.

Overview Settings

The settings below apply to the **Processes** overview.

Key	Default setting	Description
CaseHandlerShownShortNames	TRUE	Specify if you want to display the casehandler's initials or full name in the **Processes overview**. TRUE - Initials FALSE - Full name
CaseHandlerUnitShownShortNames	TRUE	Specify if you want to display the short name or the full name of the casehandler's unit in the **Processes overview**. TRUE - Initials FALSE - Full name
MaxODataPages	3	Specify the default maximum amount of data to display on a page in the **Processes** overview. See Customize maximum data to display on a page in the

Key	Default setting	Description
		WorkZone Process Administrator's Guide for information about how the amount of data is calculated.
OwnerShownShortNames	TRUE	Specify if you want to display the process owner's initials or full name in the Process overview. TRUE - Initials FALSE - Full name
PendingShownShortNames	TRUE	Specify if you want to display the pending actor's initials or full name in the Process overview. TRUE - Initials FALSE - Full name
PendingUnitShownShortNames	TRUE	Specify if you want to display the short name or the full name of the pending actor's unit in the Process overview. TRUE - Initials FALSE - Full name

Workflow host settings

The settings below apply to the workflow host.

Key	Default setting	Description
Access	DELEGATE	Defines who can access processes on the current environment. The default value is

Key	Default setting	Description
		DELEGATE. See Configure default access settings in the WorkZone Process Administrator's Guide.
AllowNewInstancesInAD	FALSE	Defines whether to recycle names in WorkZone Process using Active Directory Replication. The default value is FALSE, which disables recycling of names. See Configure the use of new name instances in the WorkZone Process Administrator's Guide.
WatchDelay	30	Controls the amount of time passed since the workflow should have been started. The setting has a default value of 30 minutes. See Configure workflow failover in the WorkZone Process Administrator's Guide.
WatchInterval	5	Controls intervals between checks. If a web server is unavailable, workflows are not reactivated. In order to avoid this, all workflow hosts periodically check

Key	Default setting	Description
		for workflows that are overdue. The setting has a default value of 5 minutes. See Configure workflow failover in the WorkZone Process Administrator's Guide.

WORKZONE Settings

Key	Default setting	Description
PartyIdentifierSources	Default location of WorkZone CPR and CVR data.	Specifies where the SmartPostsending process looks up sender information such as CVR or CPR numbers. Change the XML element in this setting if the location of the CPR and CVR data has been customized. See Configure SmartPost PartyIdentifierSources in the WorkZone Process Developer's Guide.
ContactAddressKeySources	Default location of WorkZone CPR and CVR data.	Specifies where the SmartPost receiver process looks up sender addresses based on the CVR and CPR numbers provided by e-Boks. For example, for the purpose

Key	Default setting	Description
		of linking the received documents to the addresses of the senders. Change the XML element in this setting if the location of the CPR and CVR data has been customized. See Configure SmartPost ContactAddressSources in the WorkZone Process Developer's Guide.

The Process Dispatchers Module

The **Process Dispatchers** module is used to configure dispatchers used by the SmartPost process in WorkZone Process. You can set up three types of dispatchers:

- E-Boks
- Straalfors
- Local print

Depending on the type of dispatcher, you can fill in the following settings.

E-Boks

The settings below apply to the **EBoks** dispatcher.

Name	Default setting	Description
URL		The URL for the e-Boks service. Enter one of the URLs depending on whether the configuration is made for test or production. Test system: `https://demo-rest.e-boks.dk/V1.svc`

Name	Default setting	Description
		Production system: `https://rest.e-boks.dk/v1.svc`
SenderSystemId		The sender system identifier, which is retrieved during the configuration of the system in the e-Boks administration portal.
ReceiverSystemId		The receiver system identifier, which is retrieved during the configuration of the system in the e-Boks administration portal.
CertificateThumbPrint		Enter the thumbprint that identifies the e-Boks certificate.
SecurityProtocol	Tls12	Denotes the security protocol to be used when communicating with e-Boks. e-Boks provides the security protocol to be used.
MaxDocumentSize	7864320 (7.5 megabytes)	The maximum number of bytes that an e-Boks message can contain. Messages that exceed this limit will not be sent to e-Boks. The default value is 7864320 (7.5 megabytes). 0 indicates that no limit is enforced. The size is reduced by 25% compared to the maximum size communicated by e-Boks. Due to encoding, the maximum allowed size must be reduced by 25%.
ResponseThreshold	1800	Defines the maximum time that SmartPostexpects that it takes e-Boks to process a message. This value is used to calculate the deadline (supervised by the deadline monitor). Specify the threshold in seconds. The default value is 1800 seconds (30 minutes). The default value is most often used. In situations where the communication with e-Boks is slow, you can

Name	Default setting	Description
		increase it. In test scenarios, you can reduce the threshold, which reduces the time before a smartmail with information about an exceeded deadline is sent.

Straalfors

The settings below apply to the **Straalfors** dispatcher type.

Name	Default setting	Description
Url		The URL for the Strålfors Connect service. Depending on whether the configuration is made for test or production, enter one of the two URLs. Test: https://itest-print.sconnect.dk/fjernprint/1.0.0 Production: https://-prodprint.sconnect.dk/fjernprint/1.0.0
SenderSystemID		The system identifier, which is provided when configuring the system in the Strålfors administration portal. Either Strålfors or the person, who configures the portal for Straalfors, must provide this identifier
CertificateThumbprint		Enter the thumbprint that identifies the Strålfors certificate.
SecurityProtocol	Tls	The security protocol to be used when communicating with Strålfors. Strålfors determines which security protocol to use. The default value is **Tls** (TLS 1.0). If you run Microsoft Windows Server 2012 R2, you can set it to **Tls12** (TLS 1.2). If you run Microsoft Windows Server 2008

Name	Default setting	Description
		R2, it is possible to set this to Tls12 (TLS 1.2), but it requires an additional configuration. See the Microsoft article TLS/SSL Settings for more information. The setting is case sensitive and must be written as *Tls*.
MaxDocumentSize	50000000 (50 megabytes)	The maximum number of bytes that a message for remote print can contain. Messages that exceed this limit will not be sent for remote print. The default value is 50000000 (50 Mb). Unless otherwise communicated, it is recommended to keep the values provided at the installation.
StraalforsResponseThreshold	-1	Defines the maximum time that SmartPost expects that it takes to send a message to Strålfors. This value is used to calculate the deadline (supervised by the deadline monitor). The value is an integer, which (if positive) specifies the threshold in seconds. If the value is zero or negative, SmartPost uses a more advanced algorithm to determine the deadline, which depends on the weekday, the type of letter, and the time of the day. If no value is specified, the advanced algorithm is used. Normally, the default setting is used. If the communication with Strålfors is very slow, you can specify a high value. In test scenarios, you can set the threshold to a low value (but not zero), which means that the deadline will be quickly exceeded .

Name	Default setting	Description
SenderName		The name of the company that is used in the postal address. The postal address is used when Strålfors produces the letters. The value should be taken from the address on which the authority will receive postal letters and returned mails.

Local print

The settings below apply to the **LocalPrint** dispatcher type.

Name	Default setting	Description
LocalPrintResponseThreshold	1800	Defines the maximum time that SmartPost expects that it takes for local print to process a message. This value is used to calculate the deadline (supervised by the deadline monitor). Specify the threshold in number of seconds. The default value is 1800 seconds (30 minutes). If it happens to be the end of a business day, the deadline automatically changes to the next business day taking into account weekends and holidays. The default value is most often used.
SenderName		Not used.

The E-boks Materials Module

The **e-Boks Materials** module is used to set up e-Boks materials that are used in the SmartPost process. An e-Boks material is a configurable item in e-Boks, which describes what to be communicated to the end user.

You need to create e-Boks materials in e-Boks first and get the e-Boks IDs. See Configure e-Boks materials in the WorkZone Process Administrator's Guide.

Name	The name of the material.

E-Boks ID	The identifier of the material that the organization has created in the e-Boks Administration Portal.
Replyable	Select this check box to indicate whether the material is replyable. You selection must correspond to the e-Boks material setup in the e-Boks Administration Portal. If the organization has configured the e-Boks material as replyable in the e-Boks Administration Portal, you need to select this check box. The material determines whether the user can reply to a message.
Order	The order in which the materials will be shown in the **E-boks material** field in the **Send SmartPost** dialog box. You can set up which material to show by default in the **DefaultMaterialID** setting. Click **Operations** > **Processes**, and then select the **SmartPost** process. The **SmartPost Settings** are shown in the lower right corner.

Localized names

Text	The name of the material that is shown in the **Send SmartPost** dialog box.
Culture	The display language.
Source	The current language code (i.e. default language).

The Remote Print Types Module

In the **Remote Print Type** module, you can set up remote print types, which are used by the SmartPost package in WorkZone Process. Each remote print type defines how Strålfors, the remote print service provider, handles and prints SmartPost messages. The remote print types are displayed in the **Remote print type** field in the **Send SmartPost** dialog box in WorkZone Client. See also Configure remote print types in the WorkZone Process Administrator's Guide.

You can set up which remote print type to be displayed by default in the **DefaultRemotePrintypeIID** setting under **Operations** > **Settings**. See .

Cell	Description
ID	An identifier of the remote print type. The ID is generated automatically. You need this ID to specify which remote print type to use as default. See setting in the process settings.
Name	Enter a descriptive name for the remote print type. The name will be shown on the **Remote print type** list in the **SmartPost** dialog box.
Postage cat-egory	Specify the postage category.
Returned Letter Handling	Specifies how Strålfors handles letters that are returned to Strålfors in case PostNord has not been able to deliver the letter. If you select **true**, Strålfors destroys the letter. If you select **false**, Strålfors performs no action.
Urgency Level	Specify the level of urgency.
Simple/Duplex	Specify whether to print the letter single-sided or double-sided.
Print Color	Specify black/white or color print.
Envelope Type	Specify the size of the envelope.
Order	The order in whichthe remote print types will be shown in the **Remote print type** field in the **Send SmartPost** dialog box.
Access Code	Enter an access code if different authorities want to use different remote print types.

The Dispatch Sequences module

The **Dispatch Sequences**module is used to create and configure dispatch sequences in theSmartPostprocess. A dispatch sequence is a prioritized set of dispatchers that theSmartPostuser can select in the**Send SmartPost** dialog box. See also Configure dispatch sequences in the WorkZone Process Administrator's Guide.

ID	The identifier of the dispatch sequence.
Name	The name of the dispatch sequence.
Order	The order in which the dispatch sequences will be shown in the **Dispatch sequence** field in the **Send SmartPost** dialog box.

	You can select which dispatch sequence to display by default in the**DefaultDispatcherSequenceId** setting under **Operations** > **SmartPost Settings**.
Access code	Enter an access code if other authorities want different dispatch sequences.

Localized names

Text	The name of the dispatch sequence that is displayed in the **Send SmartPost** dialog box.
Culture	The display language.
Source	The current language code (i.e. default language).

Dispatch type order

Dispatch Order	The prioritized order of the dispatchers that defines the dispatch sequence.
Dispatcher	The dispatcher.

The Document format Module

The **Document format** module manages Captia Web Client's integration with other systems' file formats, for example word processing programs. In this module, you can view and maintain data regarding document types in the register document_formats.

The **Document format** module is the platform for configuring which types of documents the WorkZone system should accept and which types the end user should be able to edit.

Be aware that despite the system's ability to store close to all known formats, it is not necessarily advisable - and your organization may simply not be allowed to. Often organization have to comply with a given set of rules and regulations regarding the transfer of documents to a central archive - and they may only accept certain formats.

For more information, see the web site of the Danish State Archives.

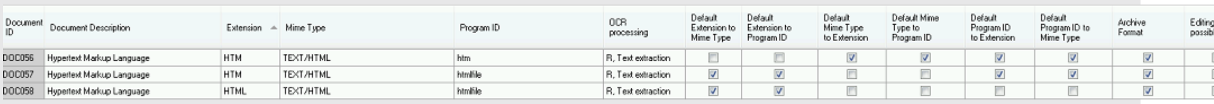
The prerequisite for gaining access to the **Document format** module is the access code **DATAADM**.

Click **Operation** > **Document format** to open the module.

Document format meta data

By default, all current document formats are pre-configured in the **Document Format** module.

<table>
<tr><th>Cell</th><th colspan="2">Description</th></tr>
<tr><td>Document ID</td><td colspan="2">Each created document type must refer to a unique document ID. It is up to you to decide the value of the ID.</td></tr>
<tr><td>Document Description</td><td colspan="2">Type a short and precise description of the document type.</td></tr>
<tr><td>Extension</td><td colspan="2">Enter the extension of the document type, for example, doc for Microsoft Word documents.</td></tr>
<tr><td>Mime Type</td><td colspan="2">Enter the MIME type of the document type, for example, application/Microsoft Word for Word documents.</td></tr>
<tr><td>Program ID</td><td colspan="2">Prog ID - Program ID
Enter Windows program identification, for example, Word.Document.8 for Microsoft Word documents.</td></tr>
<tr><td rowspan="4">OCR processing</td><td colspan="2">You can select different OCR processing types for all document formats.
Depending on the type of document you create, select a relevant OCR processing type.
For example, for Word.Document.8, select the R, Text extraction OCR processing type.</td></tr>
<tr><td>N, No processing</td><td>Used for audio/video files.</td></tr>
<tr><td>O, OCR recognition</td><td>Used for image files (TIF, PNG, JPG, GIF, and so on).</td></tr>
<tr><td>R, Text extraction</td><td>Used for text files (DOCX, TXT, and so on).</td></tr>
</table>

<table>
<tr><th>Cell</th><th colspan="2">Description</th></tr>
<tr><td></td><td>T, Text extraction or OCR recognition</td><td>Used for PDF files.</td></tr>
<tr><td>Default references</td><td colspan="2">
Mapping of defaults concerning the references between Extension, MIME Type, and ProgID depends on the point of origin and what is needed.
Depending on the type of document format you create, select the check boxes corresponding to the defaults that fit your purpose. Note that for each relation between extensions, MIME types, or program IDs, you can only select one check box.
<table>
<tr><th>Default reference</th><th>Description</th></tr>
<tr><td>Default Extension to Mime Type</td><td>Files with the specified extension must use the specified MIME type.</td></tr>
<tr><td>Default Extension to Program ID</td><td>Files with the specified extension must use the specified program ID.</td></tr>
<tr><td>Default Mime Type to Extension</td><td>Files with the specified MIME Type must use the specified extension.</td></tr>
<tr><td>Default Mime Type to Program ID</td><td>Files with the specified MIME Type must use the specified program ID.</td></tr>
<tr><td>Default Program ID to Extension</td><td>Files with the specified program ID must use the specified extension.</td></tr>
<tr><td>Default Program ID to Mime Type</td><td>Files with the specified program ID must use the specified MIME type.</td></tr>
</table>
Some document types have several extensions, for example HTML files that have both the extensions HTM and HTML. This results in an entry for each of the extensions. In the example below, there is one entry corresponding to the HTML extension and two entries per HTM extension as they refer to two different Program IDs. The example shows the relations between extension, program ID, and MIME type and how the default references are selected.

<table>
<tr><th>Document ID</th><th>Document Description</th><th>Extension</th><th>Mime Type</th><th>Program ID</th><th>OCR processing</th><th>Default Extension to Mime Type</th><th>Default Extension to Program ID</th><th>Default Mime Type to Extension</th><th>Default Mime Type to Program ID</th><th>Default Program ID to Extension</th><th>Default Program ID to Mime Type</th><th>Archive Format</th><th>Editing possib</th></tr>
<tr><td>DOC056</td><td>Hypertext Markup Language</td><td>HTM</td><td>TEXT/HTML</td><td>htm</td><td>R, Text extraction</td><td>☐</td><td>☐</td><td>☑</td><td>☑</td><td>☑</td><td>☑</td><td>☑</td><td></td></tr>
<tr><td>DOC057</td><td>Hypertext Markup Language</td><td>HTM</td><td>TEXT/HTML</td><td>htmlfile</td><td>R, Text extraction</td><td>☑</td><td>☑</td><td>☐</td><td>☐</td><td>☑</td><td>☑</td><td>☑</td><td></td></tr>
<tr><td>DOC058</td><td>Hypertext Markup Language</td><td>HTML</td><td>TEXT/HTML</td><td>htmlfile</td><td>R, Text extraction</td><td>☑</td><td>☑</td><td>☐</td><td>☐</td><td>☐</td><td>☐</td><td>☑</td><td></td></tr>
</table>
The Default Extension to Mime Type and Default Extension to Program ID
</td></tr>
</table>

Cell	Description
	check boxes are selected for both the HTM and HTML extensions. Note that the check boxes are only selected for one of the HTM extensions. The mime type is identical and the **Default Mime Type to Extension** and **Default Mime Type to Program ID** check boxes are only selected for one of the occurrences of the mime type. The example also shows that HTML files have two different program IDs: htm and htmlfile. The **Default Program ID to Extension** and **Default Program ID Mime Type** check boxes are selected for each of the program IDs. Note that there are two entries for the htmlfile program ID but the check boxes are only selected for one of the occurrences.
Archive Format	Select this check box to allow a given document type to be stored in Captia Web Client electronic archive.
Editing Possible	Select this check box to allow editing of this type of document.

Program Id

Regarding the information in the column **Program ID**, this must be identical with their equivalent entries in **Windows' registration database - the registry.**

Therefore you must always check the **Program ID** against its entry in the registration database. You can use the Windows registry editor, **Regedit**, to check the entry.

Get the program ID information

The file extension **.doc**. is used as an example below:

1. Click **Start** > **Run** to open the **Regedit** program.
   The **Run** dialog opens.
2. Enter **regedit** in the input box named **Open**.
3. Click **OK**. The program **Registry Editor** is opened.
4. Click the plus button at **HKEY_CLASSES_ROOT**.
5. Click the extension **.doc** entry.

6. In the right hand side pane, the standard value for the extension **.doc** is displayed - in this example **Word.Document.8**. This is the value supposed to be registered in the cell of column **Program ID**.
7. Copy the standard value in the column **Data** in this example **Word.Document.8**.
8. Insert the value into the cell of column **Program ID** in the Document Format module. Now the two entries match.
9. Place the cursor in another cell and click **Database** > **Save**.

Regedit is a registry editor. In this context, you use it to look up key information in the **Registry** - Windows' registration database - to make sure it matches the Program ID entry.

Be careful not to change or delete any entries since this could have serious consequences for your computer's future performance. The registry contains information about all installed programs and how the computer runs.

Therefore, make sure that you follow the steps carefully. For added protection, back up the registry. Then you can restore the registry if a problem occurs.

For more information about how to back up and restore the registry, view the article 322756 "How to back up and restore the registry in Windows" in the Microsoft Knowledge Base, see http://support.microsoft.com/kb/322756/.

Create document formats

By default all current document formats are preregistered and pre-configured. In case your organization lacks some document formats, you can register formats yourself.

Create a new document format

Example

Create a document format for Word.Document.8.

1. Click **Operations** > **Document Format**.
2. Press Ctrl + Down Arrow> to place the cursor in the empty bottom line. Click in the bottom row cell of the **Document ID** column. The cell becomes active and a tri-angle and asterisk - ▶ * - are displayed in the left most cell.
3. Click once in the cell to activate it.
   Enter the unique ID of the entry.
4. Write a short description of the type in **Document Description**. For example:

Document ID	`WORD08`
Document Description	`Microsoft Word` Document
Extension	`doc`
MIME Type	`APPLICATION/MSWORD`
Program ID	`Word.Document.8`
OCR processing	R, Text extraction
Default references	Select all check boxes.
Archive Format	Select the check box.
Editing possible	Select the check box.

5. Place the cursor in another cell and click **Database** > **Save** to save the document type.
6. You have now successfully created a new entry.

Repeat the steps 2-7 to create additional entries.

Edit document format

You can edit any current document formats.

edit a document format

1. Click **Operations** > **Document Format**.
2. Click the cell of the column you want to edit. The cell becomes active. Make your changes.
3. You can edit the cells of the following columns:

- Document Description
- Extension
- MIME Type
- Program ID
- OCR processing
- Default relations
- Archive Format
- Editing possible

4. Place the cursor in another cell and click **Database** > **Save** to save your changes.

The Record Access Module

The **Record Access** module manages access to records. Record Access is used for defining default values for record access. The purpose of the **Record Access** module is:

- Based on the role of the contacts attached to documents, you can define which parties by default are granted record access.
- Based on the document group registered on the document, you can define which documents by default are open for record access.

Roles

The roles are custom labels for contacts attached to documents. The roles must preexist in the **Custom Label** module, domain **AP, Document contacts**.

In the **Record Access** module, you can exclusively register default access for contacts attached to documents. You can make this function work for contacts attached to cases as well. To accomplish this you must create identical roles both for contacts attached to documents and for contacts attached to cases.

If the role "Complainant" by default is to grant record access for contacts attached to documents as well as for contacts attached to cases, you must create the role "Complainant" both as a label belonging to label type **AP** and as a label belonging to **SP**.

Document groups

The document groups employed must be registered in module **Custom Domain** as a value in domain type **AG**.

Prerequisites for managing Record Access

The prerequisite for gaining access to the **Record Access** module is the access code **PROFILADM**.

Click **Operation** > **Record Access** to open the module.

Record access meta data

In the table below describes the record access meta data:

Cell	Description
Custom Label	The contents of the cells in this column displays the values registered for label type **AP** in **Custom Label** module.
Access Right	The cells in this column contain check boxes. When a box is selected, the access right is granted for the role selected, that is contacts with the selected role.
Record Group	The content of the cells in this column displays the values registered for domain type **AG** in the **Custom Domain** module.
Access Right	The cells in this column contain check boxes. When a box is selected, the access right is granted for the selected document group, that is documents with the selected document group.

Create record access

You can define defaults for record access based on contact roles and/or document types.

grant default record access to roles

Example

An organization receives and handles complaints. The parties are registered on the cases and documents by the roles they play such as Complainant, Defendant, and so on. By default parties with these two roles must be granted record access.

1. Click **Operation** > **Record Access**.
2. Find the role you want to grant default record access in the **Custom Label** column.
3. Select the check box in the **Access Right** column in the same row.
4. Click **Database** > **Save**. The custom label is granted default records access. Repeat the steps 2 to 4 to grant access to more roles.

grant default record access to document groups

Example

An organization wants default record access to be given to documents with document group "Complaint" and "Decision".

1. Click **Operation** > **Record Access**.
2. Find the **Record Group** (i.e. document types) you want to grant default records access in the **Record group** column.
3. Select the check box in the **Access Right** column in the same row.
4. Click **Database** > **Save**. The record group is granted default records access. Repeat the steps 2 to 4 to grant access to more roles.

Disable record access

You can disable the default record access grants for both roles (Custom Label) and document groups (Record Group). The procedure for disabling the grants are the same for both roles and document groups.

disable default record access

1. Click **Operation** > **Record Access**.
2. Find the item for which you want to disable default record access.
3. Clear the check box.
4. Click **Database** > **Save**. Default records access has now been disabled for this item. Repeat the steps 2 to 4 to disable more items.

The External Sources Module

The module **External Sources** manages integrations between Captia Web Client and external systems, for instance, a service that delivers external data from an external source such as a civil registration system - in Denmark such as the CPR register.

To ensure an integration the following conditions must be met:

- The integration must be set up at the same time as the WorkZone Content Server database is installed. Then basic data concerning the integration is automatically entered into the database. Among other things this means that relevant configuration information is displayed in the column **Name** and **Description** of the **External Sources** module.
- The organizations that want to use Captia Web Client with an integration, for example CPR, must have an agreement with the provider of the service. The provider then supplies information regarding software and configuration. The name of the software and the parameters of the configuration must then be registered in the **External Sources** module.

Prerequisites for managing External sources

The prerequisite for gaining access to the **External sources** module is the access code **DATAADM**.

Click **Operation** > **External Sources** to open the module.

External sources - save parameters

In **External Sources** module you must register the name of the program that provides the service of the integration and the parameters required for the configuration of the integration.

configure a CPR service

1. Click **Operations** > **External Sources**.
2. Select the relevant row. In this example, it is the row with **CPR** in the **Name** column and **Personer** (individuals from the CPR register) in the **Description** column.
3. Fill in the cell in the **Program ID** column - in this example this should be: `sjCPRDRIVER.person`
4. Fill in the cell in the column **Parameters** - in this example this should be: `IP=`
5. Click in any adjacent cell followed by a click on **Database** > **Save**.

The Service Channels Module

The **Service Channels** module manages services such as mail import, file import and server scanning.

Click **Operation** > **Service Channels** to open the **Service Channels** module.

About service channels

Prerequisites for managing Service channels

The prerequisite for gaining access to the **Service Channels** module is the access code **DATAADM**.

Purpose of the Service Channels module

The purpose of the **Service Channels** module is to be a general tool for monitoring and importing of data for Captia Web Client.

Example

If, for example, all incoming letters are scanned into a special folder, the **Service Channels** module transfers the scanned letters to Captia Web Client.

As an integrated part of the scanning process, you can use separator sheets. They can contain information about the letters being scanned. The Service Channels' service will try to interpret and process this information, attaching it to the letters as meta data.

When the Captia Web Client users open the **Scanned today** fixed list, the items displayed are the result of the **Service Channels** module.

NT-service

Connected to the Service Channels is an NT-service named **Scanjour.Services.Service**. It can be configured to support a number of tasks. Its own task is to support regular planned execution of a number of tasks for one or more service channels.

Channels

A channel has a number of plug-ins. They are constructed to allow the channel to perform specific tasks such as monitoring the appearance of:

- new items, i.e. files in a folder,
- new mails in a mail account, or
- new items in a register in a database.

Plug ins

The number of plug-ins, which a channel needs, to perform its task may vary between 1 to 4. Each plug-in performs a well defined task which can be used by other channels as well.

The NT-service can be installed several times with its own unique ID number. Configuration of the channel is done in WorkZone Configuration Management. By stating the service ID for each channel, it is possible to make one service execute all channels or only one channel.

You can have the following plug ins:

- A **watch-plugin** monitoring and examining new items.
- A **data provider plugin** that can process and format new data in such a way, that they can be used in the plug ins mentioned below.
- A **metadata provider plugin** that is able to deliver the necessary metadata (in the correct format) based on data coming into the system.
- A **data consumer plugin** that can handle transference of data to the database.

A channel can have one or more plug-ins - only the **Watch-plugin** is mandatory. The result of the work of one plug-in is delivered to the next plug-in as raw material. Each plug-in must control whether the input received is valid - if it is not, it must deliver an error message.

The NT-service calls the plug ins defined for a channel in the following sequence:

1. watch,
2. data provider,
3. metadata provider,
4. data consumer.

The following options depends on your configuration:

- The service ID for the service to execute the channel.
- How often the service is to watch for data - how many minutes should elapse between each check.
- If the channel should be enabled or disabled.

Service channel meta data

Meta data for the columns in the upper right panel are described in the table below. Meta data displayed in the columns of the other panels depends on which channel is selected for display in the upper right panel. This meta data is explained in the following configuration examples:

- Configure file import
- Configure mail import
- Configure Serverscan

Meta data - upper right panel

Field	Description
Channel Number	Each channel must have a unique number. The number identifying the channel is up to you as long as it is unique.
Service Number	Several Channels can belong to the same service and have the same service number. It is up to you to decide the number identifying each service.
Description	Enter a short and precise description of the channel.
Scan Interval (minutes)	Period of time between each surveillance scan in minutes.
Enabled	A selected check box indicates that the service channel is enabled.
Watch Class	This cell contains a drop-down box with the following options: • Scanjour.Services.DirectoryWatch • Scanjour.Services.MailPop3Watch
Data Provider Class	This cell contains a drop-down box. Here you can select, for example Scanjour.Services.MailDataProvider
Metadata Provider Class	This cell contains a drop-down box. Here you can select, for example: • Scanjour.Services.MailMetaDataProvider or • Scanjour.Services.FileMetaDataProvider
Data Con-	This cell contains a drop-down box. Here you select, for example:

Field	Description
sumer Class	Scanjour.Services.XdiDataConsumer
Error Path	Enter the error path, for example: `C:\ServiceError\Channel1`
Last Scan	Time stamp displaying when the last scan was executed - automatically updated by the system.
Server	Server name is automatically inserted by the system.

Meta data - lower right panel

Field	Description
Service Number	The same as the number displayed in the Service Number column in the upper right panel.
Queue	Select the queue which the Service Channel must use. In the drop-down box, you have the following options: Blank, 1, 2, 3, 4 or 5. Technical information, see - Service queue - technical note.
Service Name	The Service Name is made up of 4 parts: • The name of the service • The service number • The name of the WorkZone database • The queue number
Status	Status can be **Starting**, **Started**, **Stopping** or **Stopped**. If necessary, click the **Update** button to update status information.
Logon as	The drop-down box of this field contains two options: **Local System** and **User**.

Buttons - lower right panel

Button	Function
Update	Updates the content of the **Status** field. Here you can see if the service, for instance, has started or stopped.
Install	Installs the service in the operating system. When you have installed the service, it can be displayed in the list of services with **Control Panel** ▸ **Administrative Tools** ▸ **Services**. You can start or stop a service from the Control Panel. However, you can neither install nor uninstall a service from the Control Panel.
Start	Starts the service in the operating system. Instead you can choose to start the service by means of **Control Panel** ▸ **Administrative Tools** ▸ **Services**.
Stop	Stops the service in the operating system. Instead you can choose to stop the service by means of **Control Panel** ▸ **Administrative Tools** ▸ **Services**.
Uninstall	Uninstalls the service in the operating system. When you uninstall a service, it is automatically removed for the list of services normally displayed with **Control Panel** ▸ **Administrative Tools** ▸ **Services**. You can start or stop a service from the Control Panel. However, you can neither install nor uninstall a service from the Control Panel.

Mode of operation

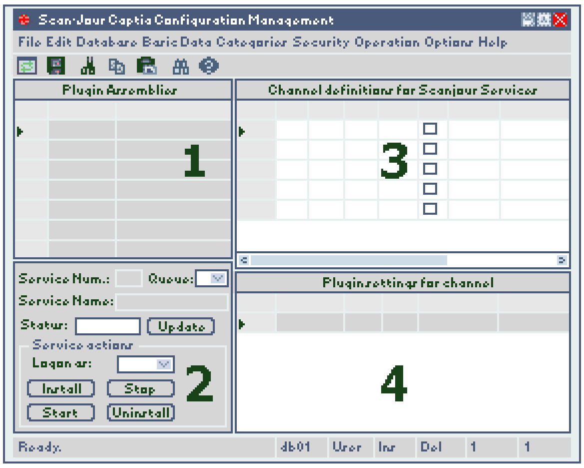
Mode	Description
1. Plug ins	First you must import the **Plug in Assemblies**. They are contained in type DLL files. There are two **Plug in Assemblies** which are part of the default program: • **Scanjour.Services.Plugins.dll** A plugin performs a specific task. The following types of plug ins can be contained in a plugin assembly: • A **watch-plugin** monitoring and examining for

Mode	Description
	new items. • A **data provider plugin** that can process and format new data in such a way, that they can be used in the plug ins mentioned below. • A **metadata provider plugin** that is able to deliver the necessary meta data (in the correct format) based on data coming into the system. • A **data consumer plugin** that can handle transference of data to the database. Import of **Plug in Assemblies** - see Import plug-in Assemblies.
2. Channels	When you have imported the plug-in assemblies you must configure the channels. A channel must have some plug ins. They enable the channel to perform a specific task, for instance, monitoring instances of new files in a folder - for example, today's scanned letters. To configuring the channels you must: • give a short description of the task of channel, for example, Serverscan. • enter what plug-ins the channel must employ. • enter the path to the folder where error messages must be delivered. A channel can have one or more plug ins - only the **Watch plugin** is mandatory. The result of the work of a plug-in is delivered to the next plug-in as raw material. Each plug-in must check that the input received is valid. If not, it must deliver an error message. Configuration of channels - see Configure service channels.
3. Services	When you have finished configuring all the channels, you

Mode	Description
	must install and start the services that the channels are using. When you have installed a service, you can find it in the list of services of the operating system - **Control Panel** > **Administrative Tools** > **Services**. You must enter whether the service should log on as • Local System - for example, Configure file import, or • User. You can specify whether the service is to use a **Queue** or not. If the service operates channels loading large amounts of mails or documents, choosing a specific queue can be an advantage. If no queue is selected, you may risk that free text indexing of documents, cases, document meta data registered by the current Captia Web Client users is blocked.

About the interface

The **Service Channels** module consists of 4 panels.



Panel 1	The panel is a sheet. Each row can contain one et plug-in assembly. Plug-in assemblies are DLL files that must be imported one by one. When they have been

	imported, they are displayed as separate rows in this panel.
Panel 2	The panel displays information about the service that operates the channel, which is in focus in panel 3.
Panel 3	**Channel definitions for Scanjour Services**. The panel contains fields and buttons for setting up the channels.
Panel 4	**Plugin settings for channel n**. The content of the panel depends on which channel is in focus in panel 3.

Import plug-in assemblies

In order to be able to create and configure service channels, you must import the necessary plug- in assemblies.

The default plug in-assembly is called `Scanjour.Services.Plugins.dll`. It contains a number of different plug ins such as:

- Scanjour.services.DirectoryWatch
- Scanjour.services.MailPop3Watch
- Scanjour.services.MailDataProvider
- Scanjour.services.MailMetaDataProvider
- Scanjour.services.FileMetaDataProvider
- Scanjour.services.XdiDataConsumer

import

1. Click **Operation** > **Service Channels**.
2. Click **File** > **Import**. The **Open** dialog is displayed.
3. Find the files. By default they are located in the KMD program folder.
4. Click the DLL you want to import.
5. Click **Open** . The file is imported.

Use the same procedure to import the other DLLs.

Configure service channels

This section describes how to configure different service channels.

Configure file import

Configuration of file import without eDeliverynote.

Prerequisite

The prerequisite for this procedure is that the relevant plug-in assemblies have already been imported.

All path descriptions are merely suggestions. They can be altered in the actual configuration.

It is possible to import one or more files from a folder. For that purpose use the following configuration:

configure file import

1. Click **Operation** > **Service Channels**. The **Service Channels** module displays.
2. Click in the first data cell in an empty row in the upper right panel - **Channel definitions for ScanJour Services** and enter the following values:

Column	Enter this value
Channel Number	**5**
Service Number	**2** - here is used the same service as for Serverscan.
Description	**Simple File Import**
Scan Intervals	**5**
Enabled	Click in the check box to enable the current channel.

Column	Enter this value
Watch Class	Select **Scanjour.Services.DirectoryWatch** in the drop-down box.
MetaDataProvider Class	Select **Scanjour.Services.FileMetaDataProvider** in the drop-down box.
Data Consumer Class	Select **Scanjour.Services.XdiDataConsumer** in the drop-down box.
Error Path	Enter this path **C:\ServiceError\Channel 5**

3. Place the cursor in another cell and click **Database** > **Save**.
4. Click the left most cell of the row you just saved. Now the bottom right panel is activated. Information concerning plug-in parameters can be registered here in the panel named **Plugin settings for channel 5**.
5. Enter the following values:

Column	Enter this value
DirectoryWatch monitored folder	**<path>** - for example C:\FileImport
DirectoryWatch Folder mask	***.imp**
FileMetaDataProvider Metadata XML template	**<path>** - for example `C:\Program Files\KMD\WorkZone\Pro-gram\XdiData\SjFesdPacket.xml`
FileMetaDataProvider Organizational Unit	(If wanted - sjKomm compatible)
FileMetaDataProvider Dokumenttype	(If wanted - sjKomm compatible)
FileMetaDataProvider Dokumentgruppe	(If wanted - sjKomm compatible)
FileMetaDataProvider Access code	
XdiDataConsumer XML	**<path>** - for example, `C:\Program`

Column	Enter this value
Scheme folder	`Files\KMD\WorkZone\Program\XdiData`

6. Place the cursor in another cell and click **Database** ▸ **Save**.

   The information has been saved.

Installing and starting the service

In the lower left panel, you can now install and start the service. The service must be started as **Local System**.

Configure mail import

The prerequisite for this procedure is that the relevant plugin assemblies have already been imported.

All path descriptions are merely suggestions. They can be altered in the actual configuration.

It is possible to import mails. For that purpose use the following configuration:

1. Click **Operation** > **Service Channels**. The **Service Channels** module is displayed.
2. Click in the first data cell in an empty row in the upper right panel - **Channel definitions for ScanJour Services** and enter the following data:

Column	Enter this value
Channel Number	**4**
Service Number	2 - here is used the same service as for Serverscan.
Description	**Simple Mail Import**
Scan Intervals	**5**
Enabled	Click in the check box to enable the current channel.
Watch Class	Select **Scanjour.Services.MailPop3Watch** in the drop-down box.

Column	Enter this value
DataProvider Class	Select **Scanjour.Services.MailDataProvider** in the drop-down box.
MetaDataProvider Class	Select **Scanjour.Services.MailMetaDataProvider** in the drop-down box.
Data Consumer Assembly	Select **Scanjour.Services.Plugins** in the drop-down box.
Data Consumer Class	Select **Scanjour.Services.XdiDataConsumer** in the drop-down box.
Error Path	Enter the following path: **C:\ServiceError\Channel 4**

3. Place the cursor in another cell and click **Database** ▸ **Save**.

   The information has been saved.

4. Click the left most cell of the row you just saved.

   Now the bottom right panel is activated. Information concerning plugin parameters can be registered here - the panel named **Plugin settings for channel 4**.

5. Enter the following values:

Column	Enter this value
MailPop3Watch Mail server Name	**<servername> -e.g.postman.KMD.dk**
MailPop3Watch Server port	**110** - default pop3 port
MailPop3Watch user name	<**user**> - mail account to watch
MailPop3Watch user password	<**password**>
MailPop3Watch Mail folder	**<path>** - for example, `C:\ServerMail`
MailDataProvider	<path> - for example, `C:\ServerMail\Mail`

Column	Enter this value
Mail folder	
MailMetaDataProvider Metadata XML template	**<path>** - for example `C:\Program Files\KMD\WorkZone\IIS\WorkZone\App\Captia\SjFesdPacket.xml`
MailMetaDataProvider organizational unit	(If wanted - sjKomm compatible)
MailMetaDataProvider document type	(If wanted - sjKomm compatible)
MailMetaDataProvider document group	(If wanted - sjKomm compatible)
MailMetaDataProvider access code	
XDIDataConsumer XML scheme folder	**<path>** - for example, `C:\Program Files\KMD\WorkZone\Program\XDIData`

6. Place the cursor in another cell and click **Database** > **Save**.

Install and start the service

In the lower left panel you can now install and start the service. The service must be started as **Local System**.

Configure Serverscan

The prerequisite for this description is that the relevant plug-in assemblies have already been imported.

All path descriptions are suggestions. You can change them in the actual configuration.

1. Click **Operation** > **Service Channels**. The **Service Channels** module displays.
2. Click in the first data cell in an empty row in the upper right panel - **Channel definitions for ScanJour Services** and enter the following values:

Column	Enter this value
Channel Number	**2**
Service Number	**2**
Description	**Serverscan**
Scan Intervals	**1**
Enabled	Click in the check box to enable the current channel.
Watch Class	Select **Scanjour.Services.DirectoryWatch** in the drop-down box.
Data Consumer Class	Select **Scanjour.Services.XdiDataConsumer** in the drop-down box.
Error Path	Enter the following path: **C:\ServiceError\Channel 2**

3. Place the cursor in another cell and click **Database** > **Save**.
   The information has been saved.
4. Click the left most cell of the row you just saved - the cell to the left of **Channel Number**. Now the bottom right panel is activated. You can register information about plugin parameters here - the panel is named **Plugin settings for channel 2**.
5. Enter the following values:

Column	Enter this value
DirectoryWatch monitored folder	`C:\XDIPORT`
Direct oryWatch Folder mask	`*.xdi`
XdiDataConsumer XMLs-cheme folder	`C:\Program Files (x86)\KMD\WorkZone\Pro-gram\XDIData`

6. Place the cursor in another cell and click **Database** > **Save.**

Installing and starting the service

In the lower left panel you can now install and start the service. The service must be started as **Local System**.

Service queue - technical note

The WorkZone database has a register service_queue which is used to control the tasks the agents perform.

The following agents may exist in a Captia Web Client installation:

Agent	Description
AgentFIX	Responsible for the free text indexing of documents and records.
AgentOCR	Responsible for producing a textual version of tiff documents.
AgentSUB	Responsible for publishing documents.
Scanjour.Service	Responsible for scanning documents, importing files and mails into the WorkZone system.

When a document is imported into Captia Web Client, a job is either queued for the OCR agent to produce an OCR version of the document or a job is queued for the FIX agent requesting the document to be indexed. When cases and records are created in the database, a job to index these is also queued for the FIX agent.

When the **Scanjour.Service** is used to import documents or mails, these types of jobs are also queued for the agents. To avoid that the scanned documents block the agents' work, initiated by interactive users of Captia Web Client, the database implements a number of tables used by the service_queue. The actual table used depends on the user. In the system 5 users are special because they see a table in a different schema:

User	Schema and table
Normal users	sjsysadm.service_queue

User	Schema and table
sjserviceagentuser	sjsysadm.service_queue
sjserviceagentuser1	sjserviceagentuser1.service_queue
sjserviceagentuser2	sjserviceagentuser2.service_queue
sjserviceagentuser3	sjserviceagentuser3.service_queue
sjserviceagentuser4	sjserviceagentuser4.service_queue
sjserviceagentuser5	sjserviceagentuser5.service_queue

It is possible to start the agents (except AgentSUB) under a special user, the /queue=n (n>=1, n<=5) controls which of the 5 special users above is used, when the agent calls SOM. If no queue is specified, the sjserviceagentuser will be used as default.

The documents inserted into the database will result in new jobs for the OCR or FIX agent - these jobs will end up in sjserviceagentuser1.service_queue. This queue requires that FIX and OCR using queue=1 (and running under sjserviceagentuser1) are installed and running, because these agents will be the only ones able to see the table sjserviceagentuser1.service_queue.

Other scanners or mail importers using Scanjour.Service may be set up to use other queues which will prevent them from blocking the work of each other (and the interactive Captia Web Client users work as well).

The Options Module

The **Options** module manages a number of possibilities for configuring WorkZone Configuration Management with regard to, for example, language, warnings, and so on.

Prerequisites for managing Options

The prerequisite for gaining access to the **Options** module is the access code **DATAADM**.

Click **Options** and then select an options sub module, for example **Languages**.

Select user interface language

The purpose of the **Language** module is to configure the user interface according to language. You can choose to configure the following two options:

- **Select language mode** - select one of the following:
    - **Show all** - Multi language mode. Data in all implemented languages is displayed.
    - **Show current** - Single language mode. Only data in the language selected as current language is displayed.
- **Select current language** - in this field you must select the culture code of the language to be the default language of the WorkZone Configuration Management user interface.

select language mode

1. Click **Options** > **Language**.
2. In the **Select language mode** field, select the relevant language mode - **Show all** or **Show current** from the list.
3. Click **OK**. If a module is open, it is automatically closed. The language mode selected now has been chosen for the WorkZone Configuration Management user interface as a whole.

How to select current language

1. Click **Options** > **Language**.
2. In the **Select current language** field, select the culture code of the language to be default language.
3. Click **OK**.

See also Language mode.

Configure gridviews

The purpose of the **Gridviews Options** is a way to limit the number of displayed items and thereby increase performance and reduce waiting.

When you, for example, search the use log you may risk that the system finds an excessive amount of items. It takes long time to fetch and load this amount of items into the module. To avoid this, you can set up how many items should be fetched at a time. After examining the first set of items, you can go to the next set, and so on.

The grid view is by default set to 2000. In the **Number of records in gridview** field in the **GridViewOption** dialog box, the default value is 2000__ , that is two thousand succeeded by two underscore characters, in all 6 characters.

The field must always contain 6 characters. If you, for example, want to set the number to 350 it must be entered as 350___ , that is three hundred and fifty followed by three underscore characters.

Configure the gridview

1. Click **Options** > **Gridviews**.
2. The contents of the **Number of records in gridview** field is by default 2000__. If you want to change the value to 350, it must be entered as 350___.
3. Click **OK**.

Configure warnings

The purpose of the **Warnings** sub module is to configure the extend of warnings and the level of sensitivity. Here you can set up the following warnings:

- Warn about a search when the number of rows exceeds a certain number
- Warn about resetting the IIS when the register security is changed.
- Warn about disabling the register protection.
- Sound an acoustic alarm on error.

Open the Warnings form

1. Click **Options** > **Warnings**.
2. Click **OK** to save settings and close the dialog.

Warning about number of search results exceeds a certain number

If the check box is selected, you set up the system to warn you when the number of rows retrieved exceeds a reasonable number. You define how many is a reasonable number. If a warning should be given at, for instance, 500 it must be entered like this: 500___ = five hundred followed by three underscores. The field must always contain 6 characters.

Example

You want to see post codes of Germany. This means that several thousand post codes must be retrieved. By default the system will issue a warning, when the number of rows exceed 1000. A warning is issued:

"The selection returned 1255 rows. It may take a long time to load the rows. Do you really want to load the rows?".

To avoid waiting use the Gridviews sub module to divide the data into manageable sections - see Options - Gridviews.

Warning about resetting the IIS when the register security is changed

When changes have been made to the configuration of register security in **Register Security** module, the IIS Admin service on the server must be restarted. If the check box is selected, a warning is issued in this situation. The check box is selected by default.

Warning about disabling the register protection

In special situations users must log on to the WorkZone Configuration Management with register security disabled.

If the check box is selected, a warning is issued in this situation. The check box is selected by default.

Sounding an acoustic alarm on error

An acoustic alarm can be started when an error occurs. If the check box is selected, an acoustic warning is issued when errors occur. The check box is selected by default.

Configure display of custom labels

The purpose of the **Custom Label Options** form is that you can choose what the module displays.

The configuration you select here only applies to the WorkZone Configuration Management.

The **Custom Label** module must be active to be able to select **Custom Label** under **Options**.

Change configuration

1. Click **Basic Data** > **Custom Label**.
2. Click **Options** > **Custom Label** to open the **Custom Label Options** form.
3. Select an option:

- **Show All** - All values are displayed.
- **Show Active** - Only values without an end date are displayed.

4. Click **OK**.

Configure display of custom domain

The purpose of the **Custom Domain Options** form is that you can chose what the module displays.

The configuration you choose here only applies to the WorkZone Configuration Management.

The **Custom Domain** module must be active before you can select the **Custom Domain** under **Options**.

Change configuration

1. Click **Basic Data** > **Custom Domain**.
2. Click **Options** > **Custom Domain** to open the **Custom Domain Options** form.
3. Select an option:

- **Show All** - All values are displayed.
- **Show Active** - Only values without an end date are displayed.

4. Click the **OK** .

Technical notes

Some topics contain links to technical notes. They are only supplied where necessary. The target audience for this type of information is technicians.

- Service Channels, queue

Service queue - technical note

The WorkZone database has a register service_queue which is used to control the tasks the agents perform.

The following agents may exist in a Captia Web Client installation:

Agent	Description
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Scanjour.Service	Responsible for scanning documents, importing files and mails into the WorkZone system.

When a document is imported into Captia Web Client, a job is either queued for the OCR agent to produce an OCR version of the document or a job is queued for the FIX agent requesting the document to be indexed. When cases and records are created in the database, a job to index these is also queued for the FIX agent.

When the **Scanjour.Service** is used to import documents or mails, these types of jobs are also queued for the agents. To avoid that the scanned documents block the agents' work, initiated by interactive users of Captia Web Client, the database implements a number of tables used by the service_queue. The actual table used depends on the user. In the system 5 users are special because they see a table in a different schema:

User	Schema and table
Normal users	sjsysadm.service_queue

User	Schema and table
sjserviceagentuser	sjsysadm.service_queue
sjserviceagentuser1	sjserviceagentuser1.service_queue
sjserviceagentuser2	sjserviceagentuser2.service_queue
sjserviceagentuser3	sjserviceagentuser3.service_queue
sjserviceagentuser4	sjserviceagentuser4.service_queue
sjserviceagentuser5	sjserviceagentuser5.service_queue

It is possible to start the agents (except AgentSUB) under a special user, the /queue=n (n>=1, n<=5) controls which of the 5 special users above is used, when the agent calls SOM. If no queue is specified, the sjserviceagentuser will be used as default.

The documents inserted into the database will result in new jobs for the OCR or FIX agent - these jobs will end up in sjserviceagentuser1.service_queue. This queue requires that FIX and OCR using queue=1 (and running under sjserviceagentuser1) are installed and running, because these agents will be the only ones able to see the table sjserviceagentuser1.service_queue.

Other scanners or mail importers using Scanjour.Service may be set up to use other queues which will prevent them from blocking the work of each other (and the interactive Captia Web Client users work as well).

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