

# docurex manual

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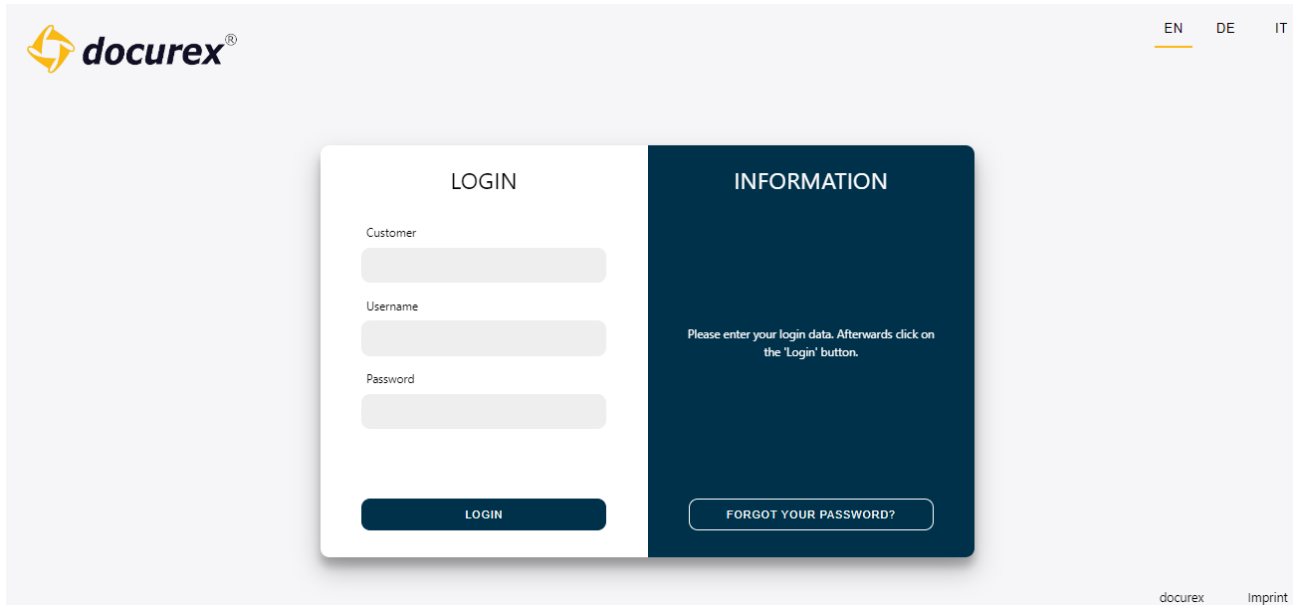
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## 1 Login

To log into the data room, visit <https://app.docurex.com>. Enter the client name, your login name and your password. Click afterwards on „sign on“.



The screenshot shows the Docurex login page. At the top left is the Docurex logo. At the top right are language links: EN (underlined), DE, and IT. The main content area is divided into two panels. The left panel, titled 'LOGIN', contains three input fields labeled 'Customer', 'Username', and 'Password', followed by a dark blue 'LOGIN' button. The right panel, titled 'INFORMATION', contains the text 'Please enter your login data. Afterwards click on the 'Login' button.' and a 'FORGOT YOUR PASSWORD?' button. At the bottom right of the page are the links 'docurex' and 'Imprint'.

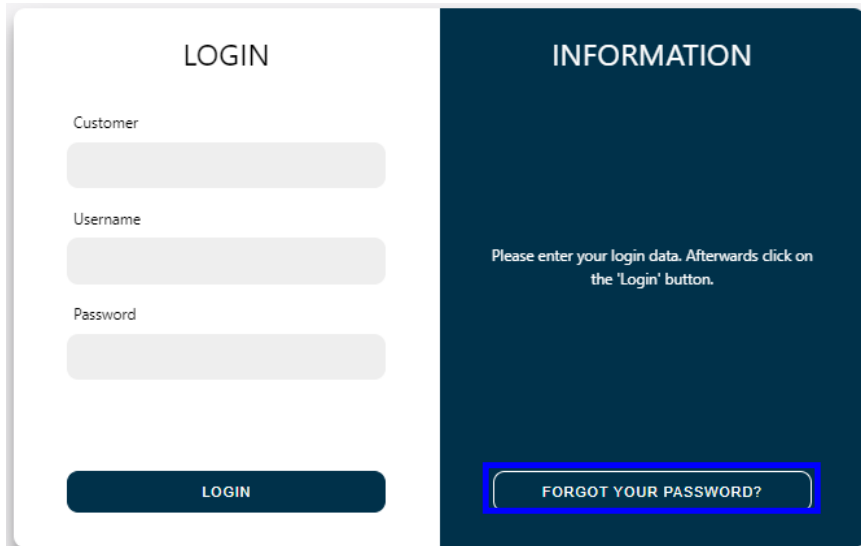
In case the „authentication“ module is active, you will be asked to enter your verification code. More information about „Verification“: Administration, General Settings , → „Verification“

If the module “disclaimer” is active, you will be forwarded to “Disclaimer”

More Information about „Disclaimer“: Administration, General Settings → Disclaimer

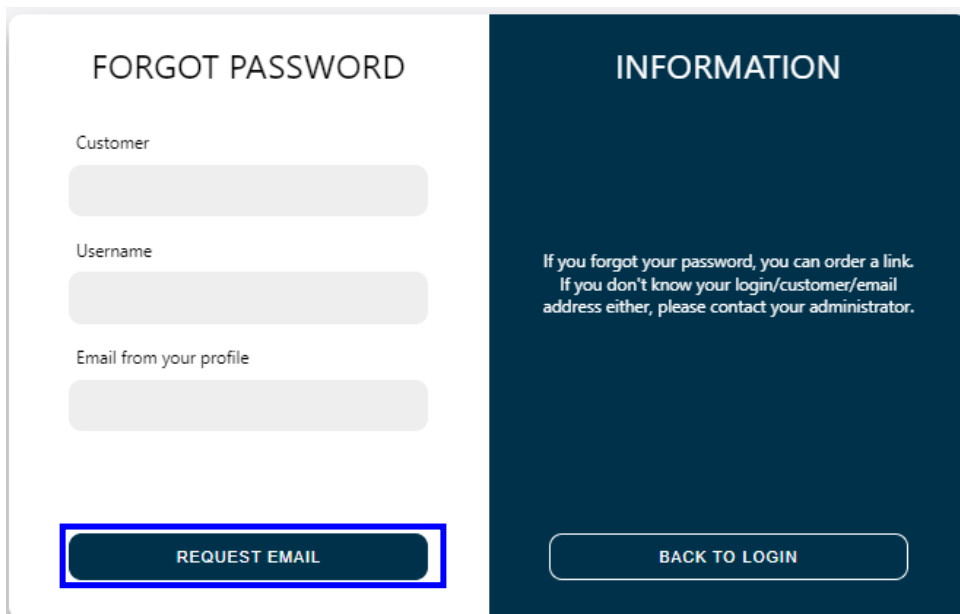
## 1.1 Reset password

If you have forgotten your password, you can generate a new one. Go to login under „Forgot your password“



The screenshot shows a login interface with two main sections: LOGIN and INFORMATION. The LOGIN section on the left contains input fields for Customer, Username, and Password, followed by a LOGIN button. The INFORMATION section on the right contains instructions: "Please enter your login data. Afterwards click on the 'Login' button." Below this text is a button labeled "FORGOT YOUR PASSWORD?", which is highlighted with a blue border.

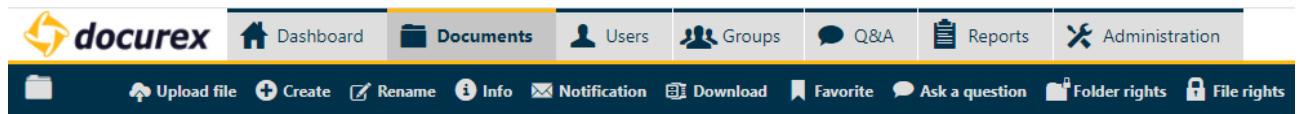
You can now request a new password.



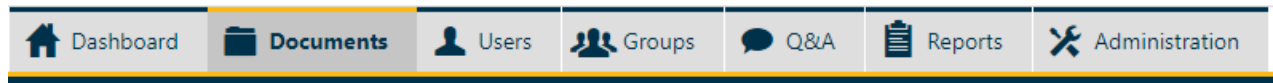
The screenshot shows a "FORGOT PASSWORD" interface with two main sections: FORGOT PASSWORD and INFORMATION. The FORGOT PASSWORD section on the left contains input fields for Customer, Username, and Email from your profile, followed by a "REQUEST EMAIL" button, which is highlighted with a blue border. The INFORMATION section on the right contains instructions: "If you forgot your password, you can order a link. If you don't know your login/customer/email address either, please contact your administrator." Below this text is a button labeled "BACK TO LOGIN".



## 2 Menu and Action Bar



### 2.1 Tab



Above you can see the tab bar, where you can click through and change in to the different areas.

### 2.2 More Options



*2-1 from left: Display for available memory, export form, user settings, support request, Log-out, logout timer*

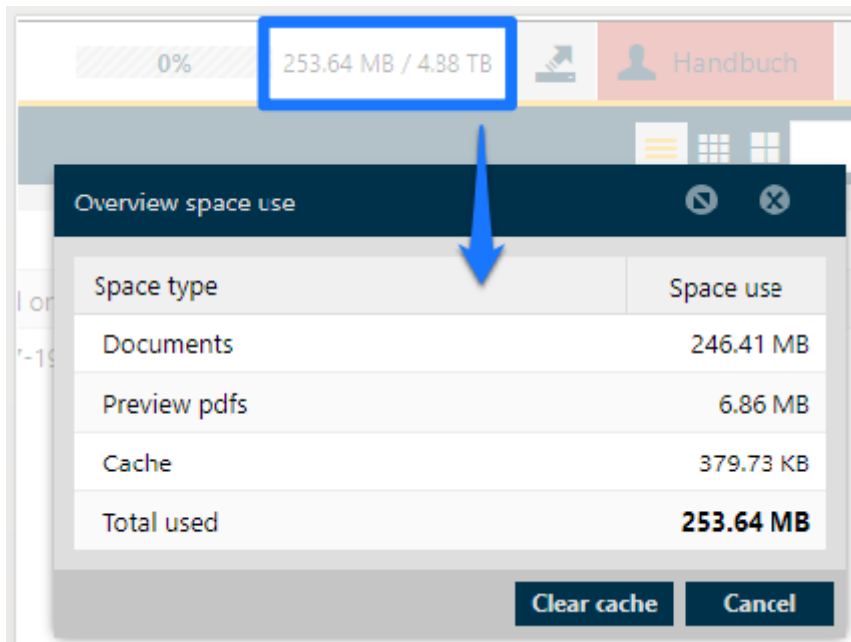
#### 2.2.1 Display for available memory

The free available disk space is displayed on the top right corner of the menu.



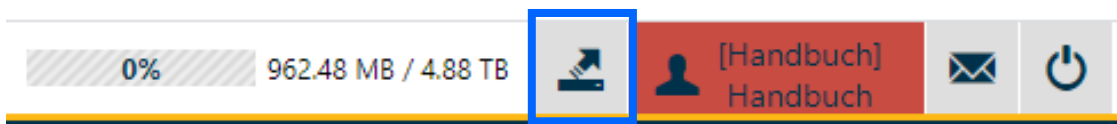
### 2.2.2 Memory usage

If you click on the memory usage indicator, you will be prompted with a detailed overview containing documents, preview PDF's and cache memory usage.



### 2.2.3 Data export form

To request an export of your data room, click the highlighted icon. This action can only be performed by an admin.



### 2.2.4 User settings







Change your personal user settings by clicking on your username in the menu bar. Hint: Administrators will be displayed with a red background.



## General settings:

### You can:

1. Change preferred language
2. Adjust menu items
3. Adjust document view
4. Order of usernames
5. Change highlighting of unread documents
6. E-mail notifications from the Q&A module

Settings	General settings
 General settings	Language: <input type="text" value="English"/>
 User preferences	Menu items: <input type="radio"/> Show menu items as texts <input type="radio"/> Show menu items as icons <input checked="" type="radio"/> Show icons and texts of the menu items
 Download docusync	Document view: <input checked="" type="radio"/> View details <input type="radio"/> Small Icon View <input type="radio"/> Icon View
 Contact list	Name sort: <input checked="" type="radio"/> Last name, first name <input type="radio"/> First name, last name
 Your OneClick-download links	Unread: <input checked="" type="checkbox"/> If active, all unread documents (not download or viewed) will be highlighted
 Docurex user manual (German)	Q&A email notification: <input type="checkbox"/> Activate or deactivate email notifications for new questions and answers

## User preferences:

You can:

1. Change e-mail address
2. Add/change phone number
3. Change password

Settings	User preferences
<ul style="list-style-type: none"> <li>General settings</li> <li><b>User preferences</b></li> <li>Download docusync</li> <li>Contact list</li> <li>Your OneClick-download links</li> <li>Docurex user manual (German)</li> </ul>	<p>Login name: <input type="text" value="Handbuch"/></p> <p>Surname, first name: <input type="text" value="Handbuch, Handbuch"/></p> <p>Email address: <input type="text" value="vanessa.hoerner@biteno.com"/></p> <p>Mobile number: <input type="text" value="+41258954580"/></p> <p>Current password: <input type="password"/></p> <p>New password: <input type="text" value="min. 8 characters"/></p> <p>Re-enter password: <input type="password"/></p> <p>API token: <input type="text"/></p> <p><a href="#">Show passwords</a></p>

## Download Docusync

Download „docusync“, supported operating systems Windows 7,8 and 10.

Settings	Download docusync
<ul style="list-style-type: none"> <li>General settings</li> <li>User preferences</li> <li><b>Download docusync</b></li> <li>Contact list</li> <li>Your OneClick-download links</li> <li>Docurex user manual (German)</li> </ul>	<p><b>docusync</b></p> <p>docusync is an application to securely import folder structures and files into the docurex3 data room. docusync maps folder and document structures identically in your docurex3 data room.</p> <p>In order to install, Windows 7/8/10 is required.</p> <p><a href="#">Download docusync</a></p>

## Contact list:

Manage your contacts with their respective names and e-mail.

Save the contact while clicking „save“, at the bottom of the side, after you confirmed with ok.

Settings	Contact list		
<ul style="list-style-type: none"> <li>General settings</li> <li>User preferences</li> <li>Download docusync</li> <li><b>Contact list</b></li> <li>Your OneClick-download links</li> <li>Docurex user manual (German)</li> </ul>	First name	Last name	Email address
	Max	Mustermann	example@email.de

## User manual:

Download the user manual:

Settings	User manual
<ul style="list-style-type: none"> <li>General settings</li> <li>User preferences</li> <li>Download docusync</li> <li>Contacts</li> <li>Your OneClick-download links</li> <li><b>User manual</b></li> </ul>	<p><b>Docuplus user manual</b></p> <p>Here you can download the user manual.</p> <div> <a href="#">Benutzerhandbuch herunterladen (deutsch)</a> <a href="#">Download user manual (english)</a> </div> <div> <a href="#">Scarica il manuale utente (italiano)</a> </div>

## Manage download links:

Here you can manage your own download links.

Settings	Your OneClick-download links						
<ul style="list-style-type: none"> <li>General settings</li> <li>User preferences</li> <li>Download docusync</li> <li>Contact list</li> <li><b>Your OneClick-download links</b></li> <li>Docurex user manual (German)</li> </ul>	Link	One time	Expiration date	Email address	File name	Valid	
	http://dev.docurex3....	No	2020-08-18 23:59:59	gelöscht/deleted	Dokument1.txt	Yes	
	http://dev.docurex3....	No	2020-08-18 23:59:59	gelöscht/deleted	loremipsum.txt	Yes	
	http://dev.docurex3....	No	2020-08-18 23:59:59	gelöscht/deleted	Test2.txt	Yes	
	http://dev.docurex3....	Yes	2019-08-18 23:59:59	gelöscht/deleted	Muster.docx	No	
	http://dev.docurex3....	Yes	2019-08-18 23:59:59	gelöscht/deleted	Dokument1.txt	No	
	http://dev.docurex3....	Yes	2019-08-18 23:59:59	gelöscht/deleted	loremipsum.txt	No	
	http://dev.docurex3....	Yes	2019-08-18 23:59:59	gelöscht/deleted	Test.txt	No	
	<a href="#">Save</a> <a href="#">Reset</a>						

Here you have an overview of the files for which you have created download links.


- You have the link that can be copied with a double click
- You can see whether the link can be called up once or more
- You see the expiration date of the link
- You can see the e-mail address to which the link was sent
- You have the name of the file
- You can see immediately whether the link is still valid or not

Here you also have the option of making links that have already expired valid again by changing the date (click on the date and adjust it).

Your OneClick-download links					
Link	One time	Expiration date ↑	Email address	File name	Valid
http://dev.docurex3....	Yes	2019-08-18 23:59:59	gelöscht/deleted	Muster.docx	No
http://dev.docurex3....	Yes	2019-08-18 23:59:59	gelöscht/deleted	Dokument1.txt	No

If the date is still valid and you want a link to be available not only once but more often, you must remove the tick from "One time". You can do this by clicking on "Yes" and removing the checkmark. Then click on "Save" and the link can be called up as often as you like.

Your OneClick-download links	
Link	One time
http://dev.docurex3....	<input checked="" type="checkbox"/>



Your OneClick-download links	
Link	One time
http://dev.docurex3....	<input type="checkbox"/>

### 2.2.5 Support request

Click the highlighted icon to start/fill a support request. Only possible if the support module is active and your user has the permission to send a support request.



Use the form to start a support request. Additionally you are able to set up a timely limited external support access.




Support

Address

Biteno GmbH | Breitscheidstr. 65 | 70176 Stuttgart | Deutschland | Tel.: +49 (0) 711 4889 085 | Fax: +49 (0) 711 4889 029 | E-mail: support@docurex.com

Question:

Arial

B I U T<sup>+</sup> T<sup>-</sup>       

Call back:

Support access:

Send

Cancel

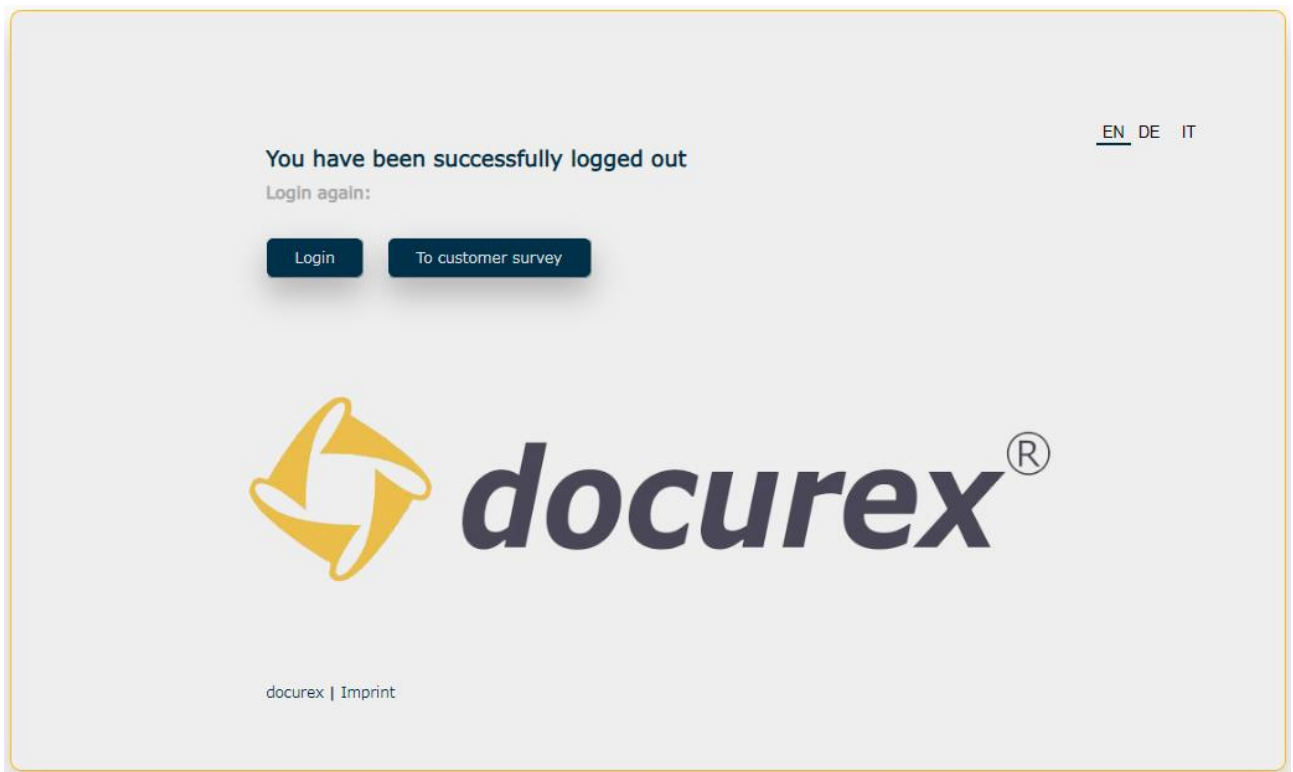
Read more about the topic "Support" under "Administration", "General Settings" → Support and under: Administrator, General Settings → Support-User.

### 2.2.6 Logout

Logout using the logout icon.



You will be automatically redirected to the logout page.



From here you can go back to the login page or take part in our customer survey.

### 2.2.7 Logout timer

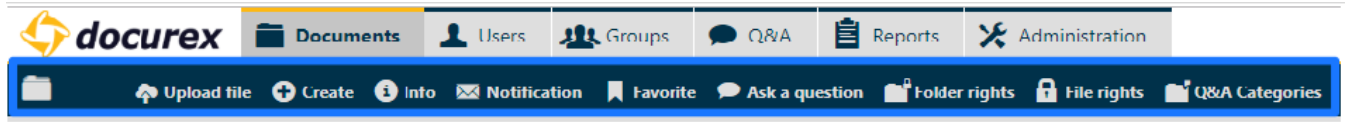
Due to security reasons, you will be logged out automatically after one hour inactivity. At the top right corner of the menu you will be valid before you are logged out.





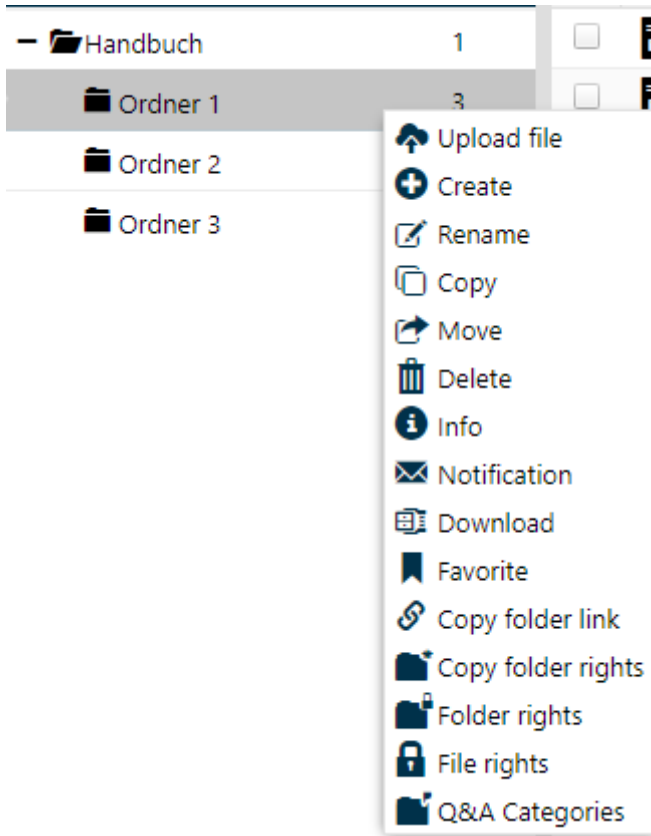
## 2.3 Action strip

The action strip is located underneath the menu bar.



While a document is selected, the action strip will display all actions which are available to you at the given time.

*Hint:* The same list of actions is also available via the right click context menu.



### 3 Dashboard

On the Dashboard you will find all newly uploaded documents since the last logout or the last 24 hours, depending on your rights.

Dashboard

Documents

Users

Groups

Q&A

Reports

Administration

0%

962.48 MB / 4.88 TB

Handbuch

Handbuch

59 min

Newly uploaded documents in the last 24 hours

Documentname	Documentpath	Uploaded on	
Handbuch_DE_- 3.3.11.doc	Handbuch/Ordner 1/Ordner 1.1	2021-04-19 10:59:28	➔
Muster.docx	Handbuch/Ordner 1/Ordner 1.1	2021-04-19 10:59:31	➔
MusterNeu.docx	Handbuch/Ordner 1/Ordner 1.1	2021-04-19 10:59:32	➔

Newly uploaded documents since the last logout

Documentname	Documentpath	Uploaded on	
Handbuch_DE_- 3.3.11.doc	Handbuch/Ordner 1/Ordner 1.1	2021-04-19 10:59:28	➔
Muster.docx	Handbuch/Ordner 1/Ordner 1.1	2021-04-19 10:59:31	➔
MusterNeu.docx	Handbuch/Ordner 1/Ordner 1.1	2021-04-19 10:59:32	➔

In addition, the new users and groups of the last 24 hours are shown.

Newly created users in the last 24 hours					Newly created groups in the last 24 hours		
First name	Last Name	Login name	Email address	Created on	Group name	A brief description of the group	Created on
Test	Benutzer	test.user	test@user.com	2021-04-19 11:00:28	New Group	Newly created group	2021-04-19 11:01:08

In addition, you get an overview of the new open and answered questions. In addition, which answers are waiting for your approval.

New questions in the last 24 hours				Responses that have been waiting for approval in the last 24 hours				
Question	Asked by	Asked on	Object	Question	Answered by	Answered on	Object	Answer of question
Test Mess	Handbuch Handbuch	2021-04-19 11:09:25		Test Question/Frage	Answer!!	2021-04-19 11:...		
Answered questions in the last 24 hours								
Question	Answered by	Answered on	Object	Answer of question				
Test Question/Frage	Answer!!	2021-04-19 11:...						

### 3.1 Help Side

There is also a link to the Docurex Help Center on the Dashboard.



Simply click on "Help" and you will automatically be taken to our Help Center.

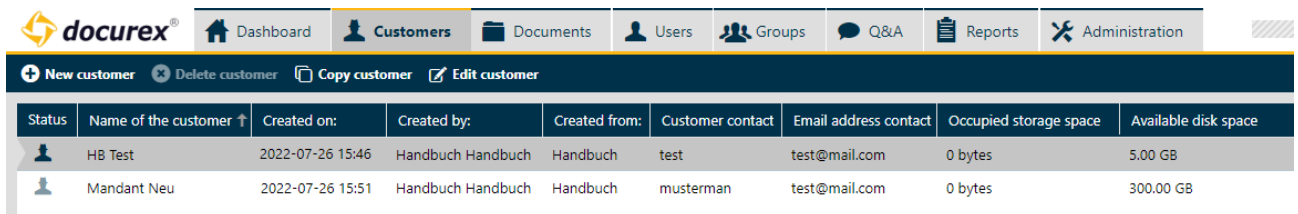
## 4 Customers

To use the customers management for your data room you need the module "Administration customer for VDR".

To get to your customers management, click on "Customers" in the menu.



There you will find all the customers you have created.

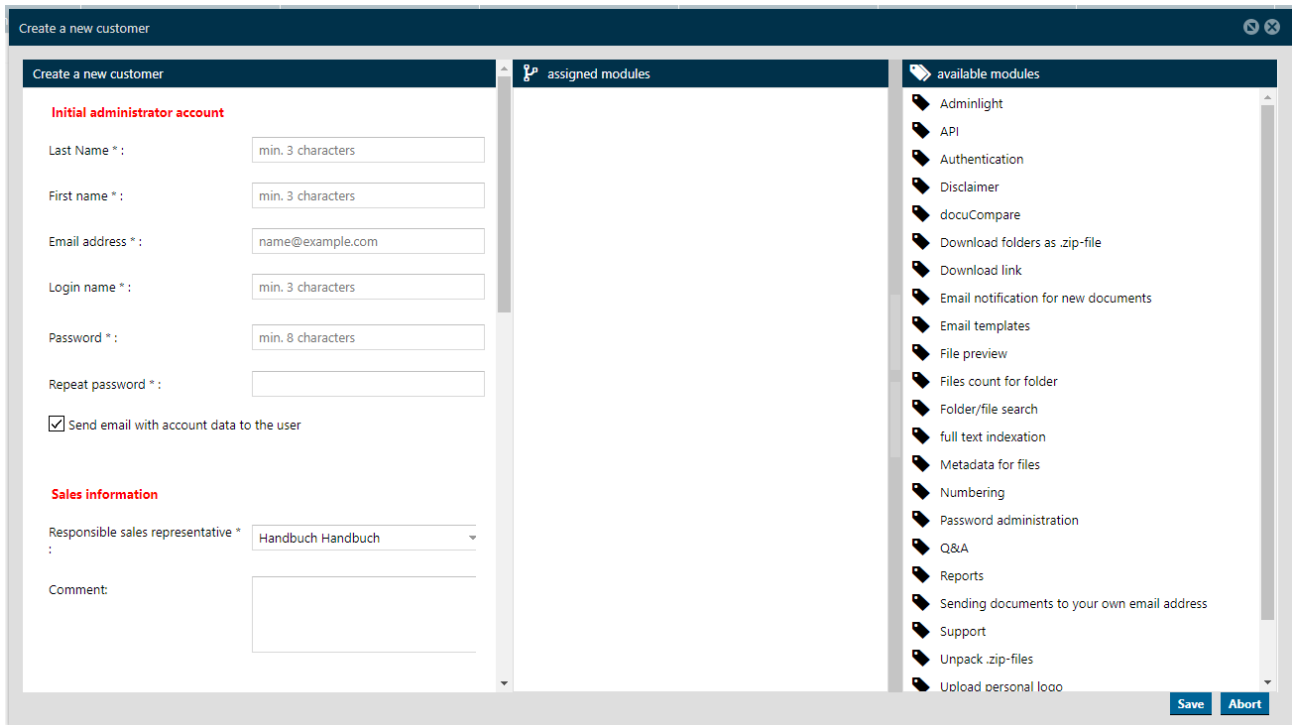


Status	Name of the customer ↑	Created on:	Created by:	Created from:	Customer contact	Email address contact	Occupied storage space	Available disk space
	HB Test	2022-07-26 15:46	Handbuch Handbuch	Handbuch	test	test@mail.com	0 bytes	5.00 GB
	Mandant Neu	2022-07-26 15:51	Handbuch Handbuch	Handbuch	musterman	test@mail.com	0 bytes	300.00 GB

### 4.1 Create Customer

To create a new customer, select the "New customer" function in the toolbar.

A window will then open in which you can make the appropriate settings.



First, fill in the initial administrator account data for the new customer.

#### Initial administrator account

Last Name * :	<input type="text" value="min. 3 characters"/>
First name * :	<input type="text" value="min. 3 characters"/>
Email address * :	<input type="text" value="name@example.com"/>
Login name * :	<input type="text" value="min. 3 characters"/>
Password * :	<input type="text" value="min. 8 characters"/>
Repeat password * :	<input type="text"/>
<input checked="" type="checkbox"/> Send email with account data to the user	

Afterwards, you can enter a person responsible for the data room and leave a comment about the customer.

### Sales information

Responsible sales representative \*  
:

Handbuch Handbuch ▼

Comment:

Next come are the data room-specific specifications.

Here you can assign the name of the new customer, define the size and activate it.

**Data room information:**

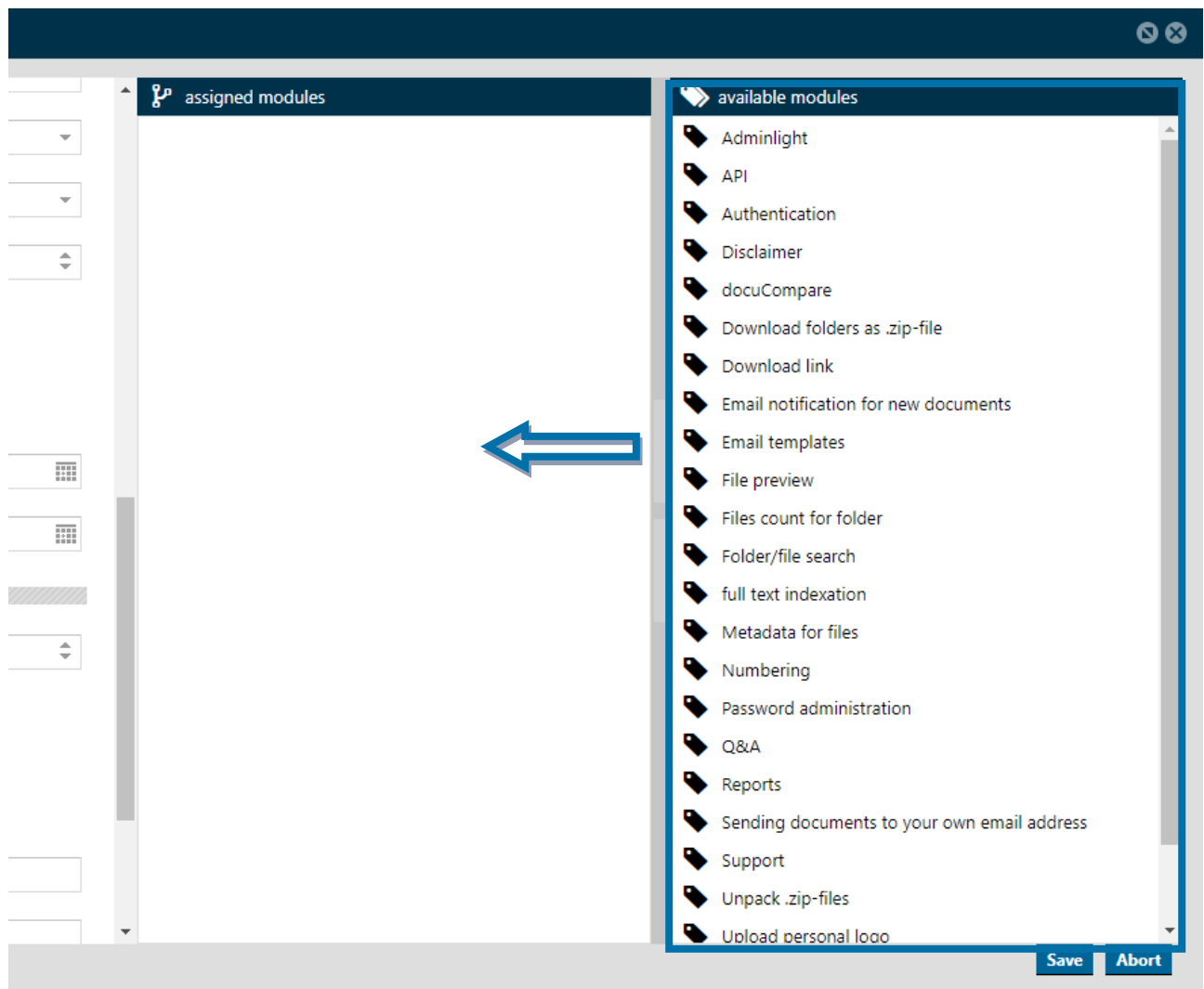
Name of the customer * :	<input type="text" value="min. 3 characters"/>
Country * :	<input type="text" value="Germany"/>
Language * :	<input type="text" value="German"/>
Theme * :	<input type="text"/>
Domain * :	<input type="text"/>
Maximum number of users * :	<input type="text" value="1"/>
Active:	<input type="checkbox"/>
Test data space:	<input type="checkbox"/>
Data space begins:	<input type="text" value="yyyy-mm-dd hh:mm"/>
Data space expires on:	<input type="text" value="yyyy-mm-dd hh:mm"/>
Size of the data space in GB:	<input type="text" value="11"/>
Available space in GB:	<input type="text" value="0"/>
Unlimited space:	<input type="checkbox"/>

Finally, you can add customer-specific information.

**Customer specific details**







Customer name * :	<input type="text" value="min. 3 characters"/>
Customer contact * :	<input type="text" value="min. 3 characters"/>
Email address contact * :	<input type="text" value="name@example.com"/>
Company number:	<input type="text"/>
Lease number:	<input type="text"/>

Now you can select from all available modules which ones should be used in the customer. To do this, assign the available modules in the Assigned modules area.



## 4.2 Edit Customer

To edit the customer, select the customer and click "Edit customer" in the toolbar. Alternatively, you can also double-click on the customer.

<div>  New customer            Delete customer            Copy customer            Edit customer         </div>			
Status	Name of the customer ↑	Created on:	Created by:
	HB Test	2022-07-26 15:46	Handbuch Handbuch
	Mandant Neu	2022-07-26 15:51	Handbuch Handbuch

Then the editing window will open and you can make your changes.

**Edit**

**assigned modules**

**available modules**

- Adminlight
- API
- Authentication
- Disclaimer
- docuCompare
- Download folders as .zip-file
- Download link
- Email notification for new documents
- Email templates
- File preview
- Files count for folder
- Folder/file search
- full text indexation
- Metadata for files
- Numbering
- Password administration
- Q&A
- Reports
- Sending documents to your own email address
- Support
- Unpack .zip-files
- Upload personal logo

**Information about the data room**

Created on: 2022-07-26 15:51

Created by: Handbuch, Handbuch

Created from: Handbuch

Used space: 0 bytes

Total size documents: 0 bytes

Utilization of the recycle bin: 0 bytes

Last Activity: -

**Sales information**



Responsible sales representative \* : Handbuch Handbuch

Comment:

Save Reset

### 4.3 Copy customer

To copy a customer, select the customer to be copied and click on "Copy customer" in the toolbar.

+ New customer ✕ Delete customer 📄 Copy customer ✎ Edit customer			
Status	Name of the customer ↑	Created on:	Created by:
	HB Test	2022-07-26 15:46	Handbuch Handbuch
	Mandant Neu	2022-07-26 15:51	Handbuch Handbuch

Then a window opens in which you can assign the new customer name. You can also adopt some settings of the customer to be copied.

The initial administrator access of the customer to be copied is also the initial administrator access of the new customer.





#### 4.4 Delete customer

Only inactive customers can be deleted. To do this, edit an active customer and remove the check mark next to "Active".

Maximum number of users \* :

Active: ☒

You can see that the customer is inactive by the color of the status icon.

	Status	Name of the customer ↑
Active		HB Test
Inactive		Mandant Neu













Then you can select the customer and click the "Delete customer" action in the toolbar to delete your customer.

## 5 Documents

Select „Documents“ within the menu to get to the document view.



The displayed columns are width adjustable and can also be hidden completely. Any changes to the columns will be persisted for your user automatically.

Search		 > Handbuch > Ordner 1							
Folders									
-  Handbuch 1		<input type="checkbox"/>	Name	Size	Created on	Created by	Document type	Pages	
 Ordner 1 3		<input type="checkbox"/>	 Dokument1.txt	11.25 KB	2019-03-01 12:05	Handbuch Handbuch	-	3	
 Ordner 2 1		<input type="checkbox"/>	 loremipsum.txt	135.48 KB	2019-07-19 10:10	Handbuch Handbuch	-	39	
 Ordner 3 3		<input type="checkbox"/>	 Test.txt	7.91 KB	2019-07-19 10:10	Handbuch Handbuch	-	2	

### 5.1 Folder functions

#### 5.1.1 Create folder



To create a folder hit “create” and provide a name for the folder.

Create folder

Enter the desired folder name, which will be insert in folder Handbuch

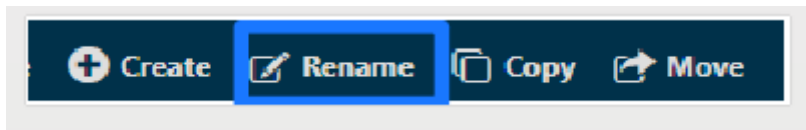
example-1

☐ Create folder free of rights

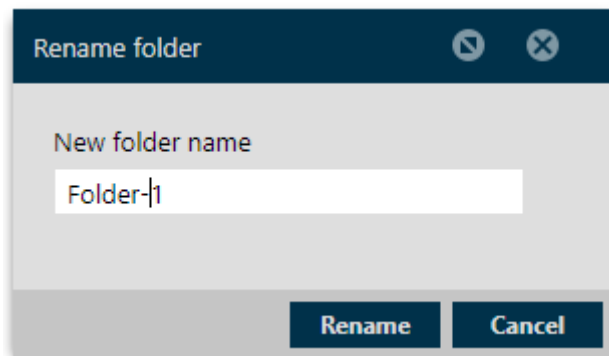
Add

Cancel

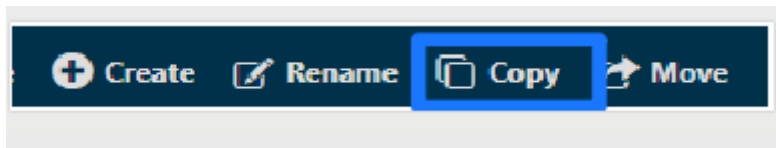
### 5.1.2 Rename folder



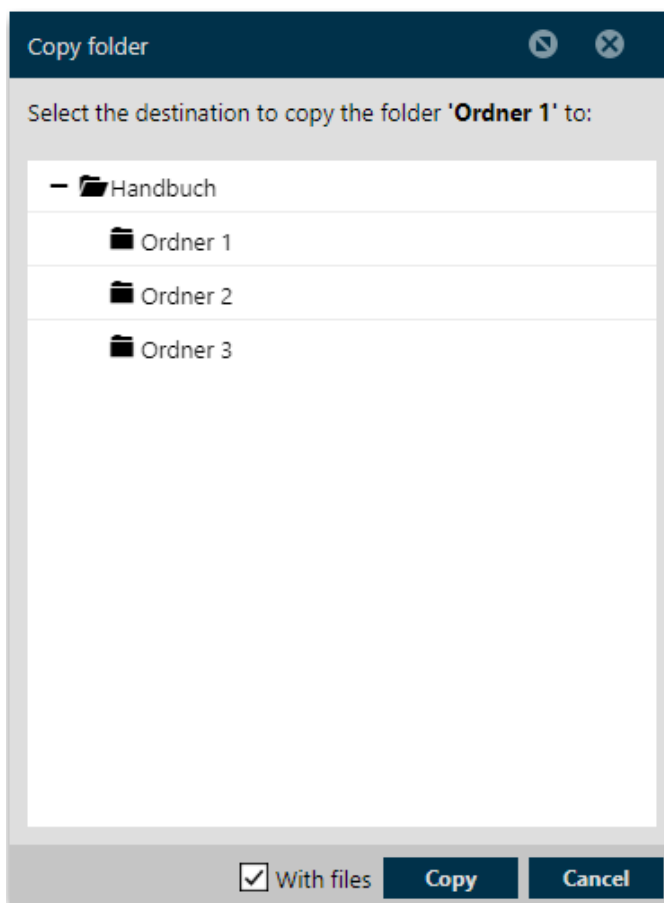
Select the folder you want to rename, click "Rename" on the action strip or in the right click context menu and enter the new name in the popup window.



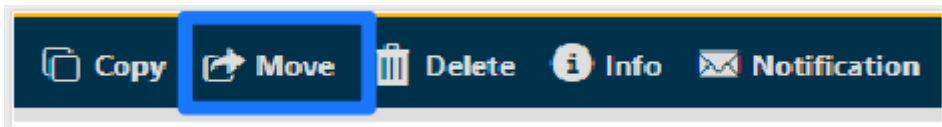
### 5.1.3 Copy folder



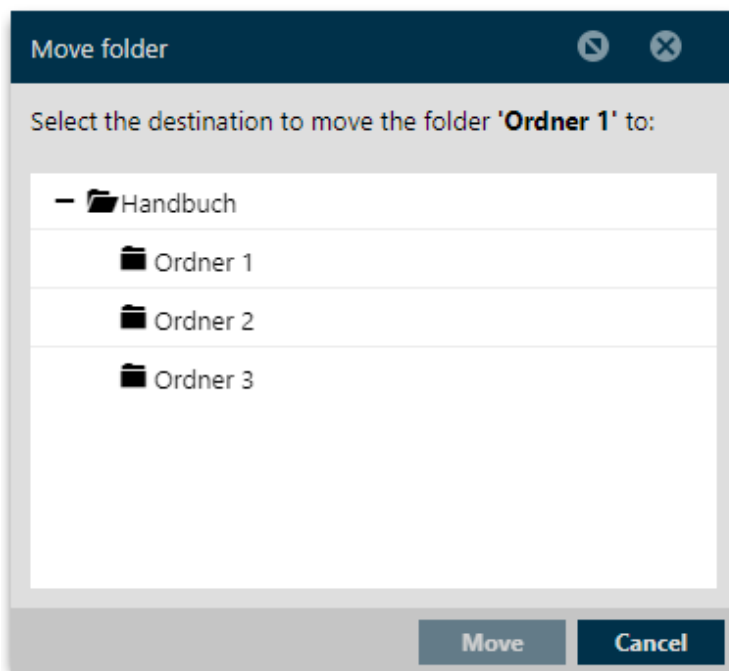
Select the folder you want to copy, click "Copy" on the action strip or in the right click context menu. Select the target folder, in which to copy the selected one, in the folder tree shown in the popup window. You may select the option to copy the folder with all its containing files.



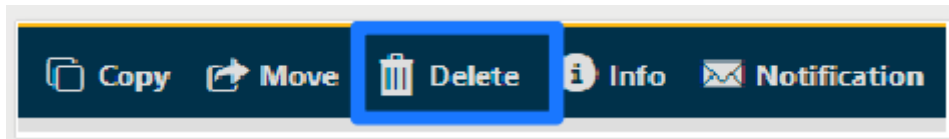
#### 5.1.4 Move folder



Select the folder you want to move, click "Move" on the action strip or in the right click context menu. Select the target folder, in which to move the selected one, in the folder tree shown in the popup window.



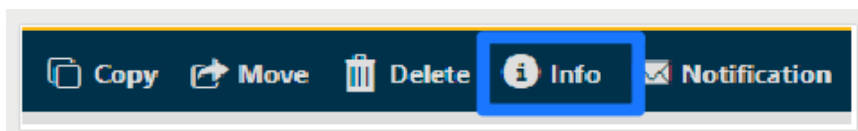
### 5.1.5 Delete folder



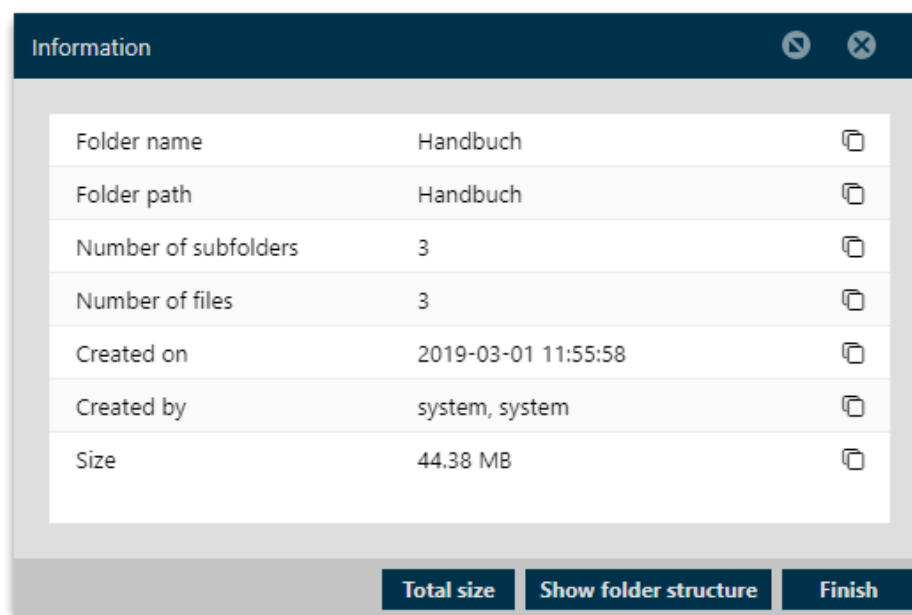
Select the folder you want to delete, click "Delete" on the action strip or in the right click context menu. Confirm to delete the folder.

*Hint:* In case, the recycle bin is activated, the data will be moved into the recycle bin. Otherwise it will be deleted irreversible.

### 5.1.6 Folder informations

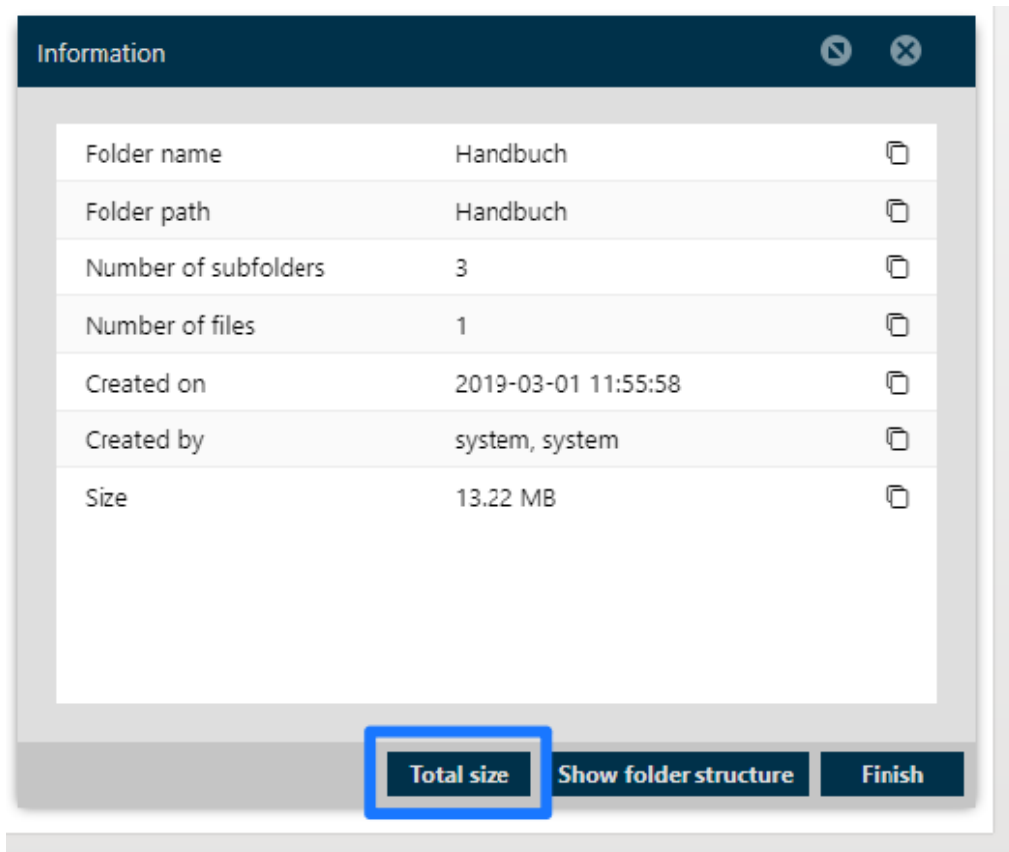


Select the folder you want to get informations about, click "Info" on the action strip or in the right click context menu. In the opening popup window the folder informations will be displayed. (The same function is also available for deleted folders in the recycle bin).



## Folder structure

The folder structure will be displayed with the option to download the structure as an excel file.



## Total size

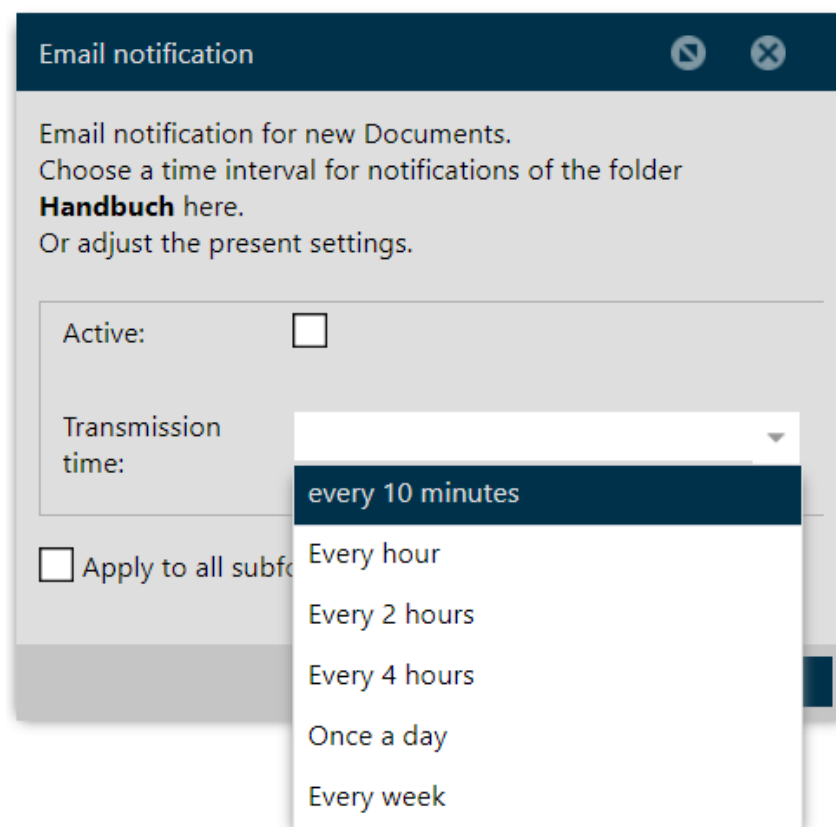
If you click „total size“ a new window will be displayed and shows the total size of the folder.

### 5.1.7 Folder Notifications

If you want to get notifications about new downloaded folders, select requested folder and click on the action strip "Notification".

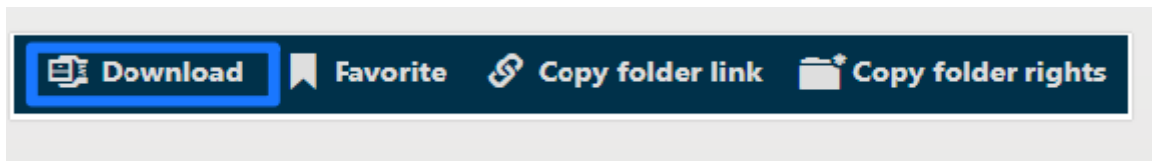


You can activate/deactivate notifications and select interval to receive Notifications.  
To get settings for subfolders, select the required case in the check box.

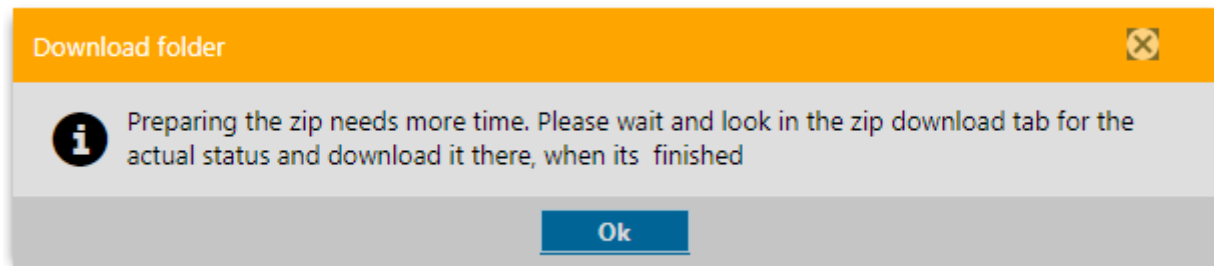




### 5.1.8 Download folder



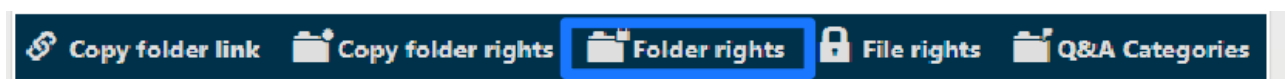
To download a folder, select the folder und click "Download" on the action strip.  
If the folder is too big and the download could take a little longer, you will get a message that the folder can be downloaded under the tab "[Zips created for folders / documents](#)".



You can download the folder afterwards.

You now receive informations about all available documents and total size of the file.  
You can zip the entire folder with all its files and subfolders afterwards.

### 5.1.9 Folder permissions



To set folder permissions, select the folder and click "Folder rights" in the action strip.

Effective user rights of "Ordner 1"										
User name (Login name) ↑										
Admin, Admin (admin)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Handbuch, Handbuch (Handbuch)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Mustermann, Max (max)	✓	✓								✓

Select for the actions the checkbox to de-/activate the actions.

To adopt the settings to all subfolders, you can mark „Apply to all subfolders“.

*Hint:* By holding the cursor on the icon symbol, you will see the name of the action.

Please note, to save „User rights“ in the checkbox, the changes will be adopted. *Hint:* Should you set no changes in the permissions, and only select “Apply to all subfolders”, you have to save “Effective group rights” in the checkbox.

To get informations about user rights, click “Effective user rights” and you get a list of persons and their permissions of the folder.

Manage folder permissions of "Ordner 1"

Group name									
Administratoren	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Benutzer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☒ **Effective user rights**
☐ Apply to all subfolders
 Save
Cancel

Effective user rights of "Handbuch"

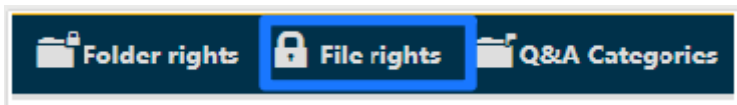
User name (Login name) ↑								
Admin, Admin (admin)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Handbuch, Handbuch (Handbuch)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mustermann, Max (max)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
test, test (test)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Back to edit rights
Cancel

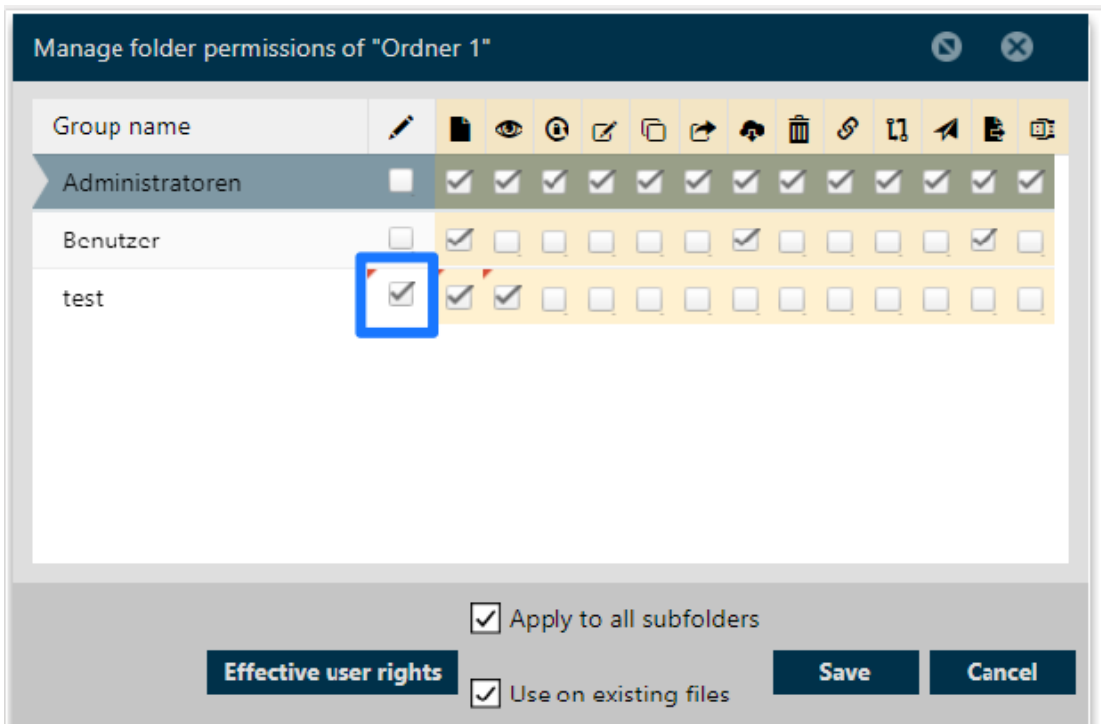
Hint: Should you set no changes in the permissions and only select "Apply to all subfolders" you have to save group permissions in the checkbox.



### 5.1.11 File permissions



To set permissions for groups of all files of a folder, select the file and click "File rights" on the action strip.



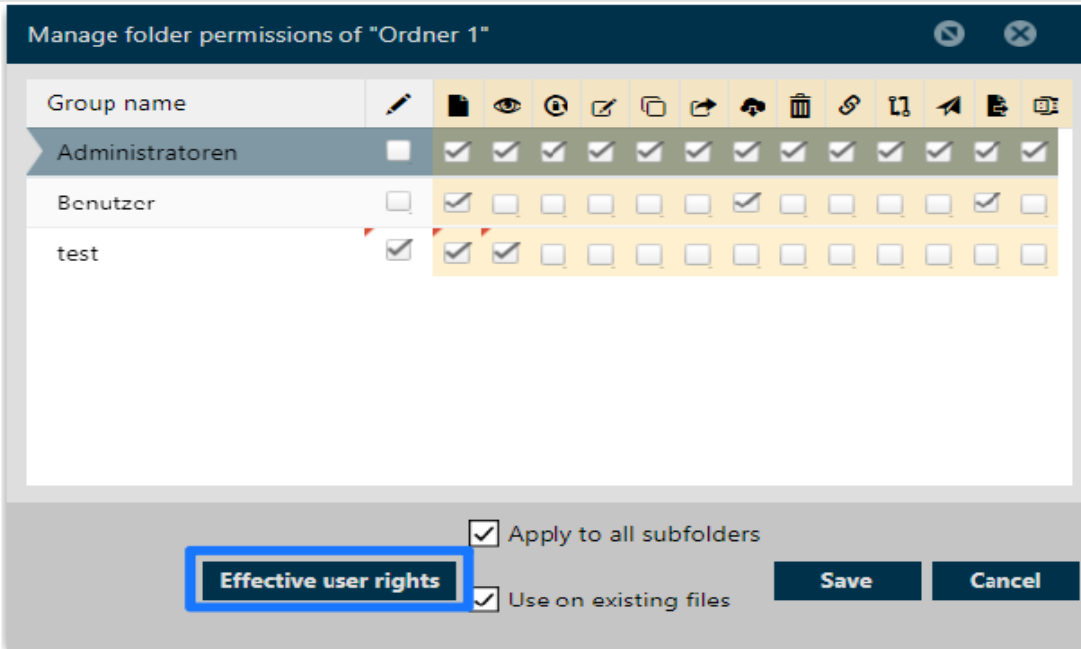
You see the assigned permissions for every group. Select the checkbox of an action to activate/deactivate it for the selected group. To recursively inherit those actions to every subfolder, select the checkbox "Apply to all subfolders". To inherit the actions to all existing files, click the checkbox "use on existing files."

*Hint:* By holding the cursor above the icon of a symbol, you can see the name of the action.

Remember to check the checkbox "save group permissions/rights, otherwise the permissions won't be saved."

*Hint:* In case you want to inherit your changes to the subfolders and existing files, just select the appropriate checkboxes and „Save Group Permissions“.

To display the access rights of a file, click on „effective user rights“ and a list of users with there file access rights will be shown.

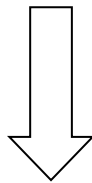
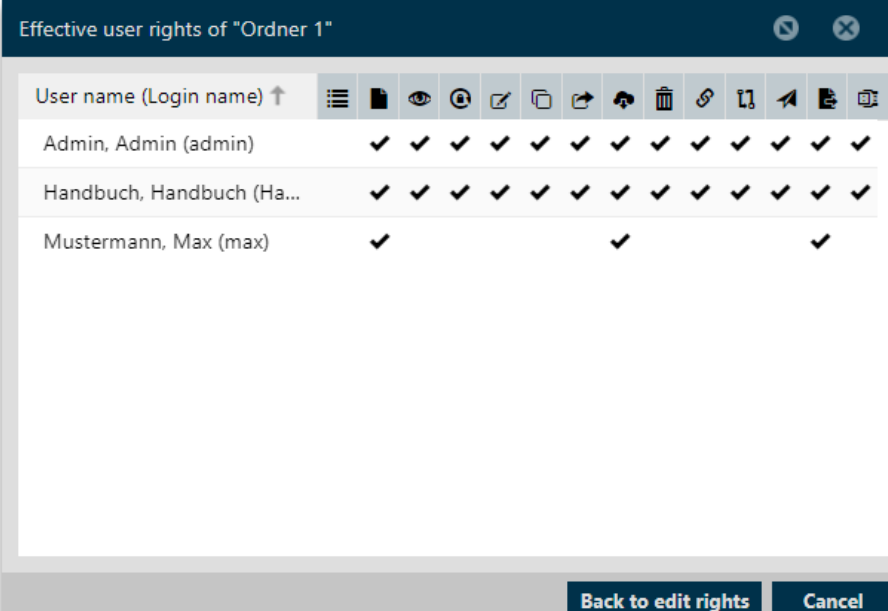


Manage folder permissions of "Ordner 1"

Group name																			
Administratoren	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Benutzer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

☒ Apply to all subfolders  
☒ Use on existing files

**Effective user rights**
Save Cancel

Effective user rights of "Ordner 1"

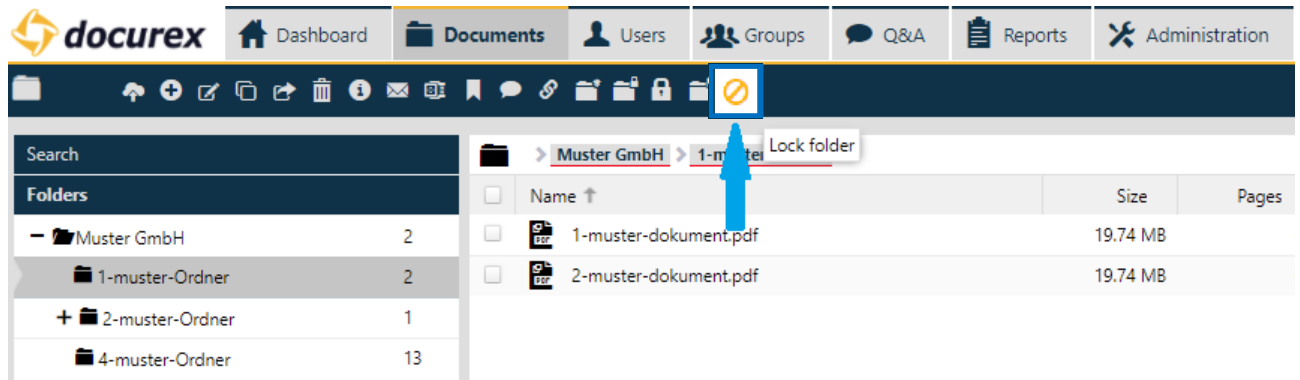
User name (Login name) ↑																			
Admin, Admin (admin)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Handbuch, Handbuch (Ha...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Mustermann, Max (max)	<input checked="" type="checkbox"/>							<input checked="" type="checkbox"/>										<input checked="" type="checkbox"/>	

Back to edit rights Cancel

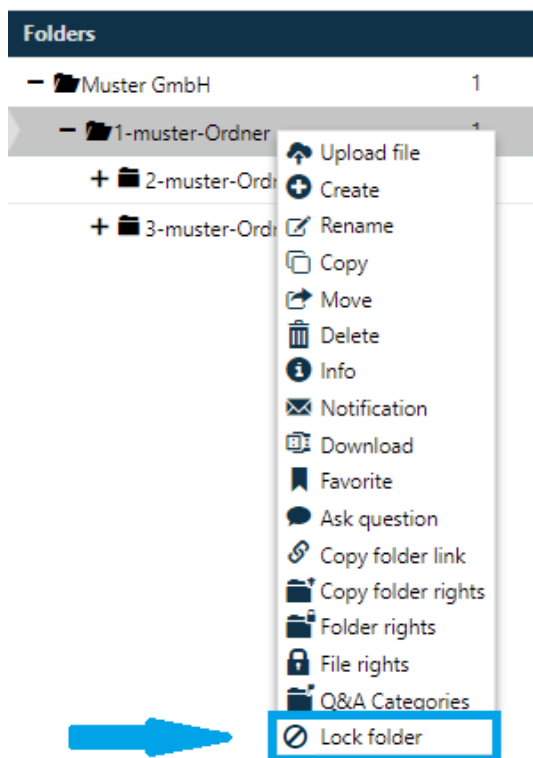
### 5.1.12 Lock Folder

This offers administrators the option of locking a subfolder in the Dataroom and thus preparing it for a partial export.

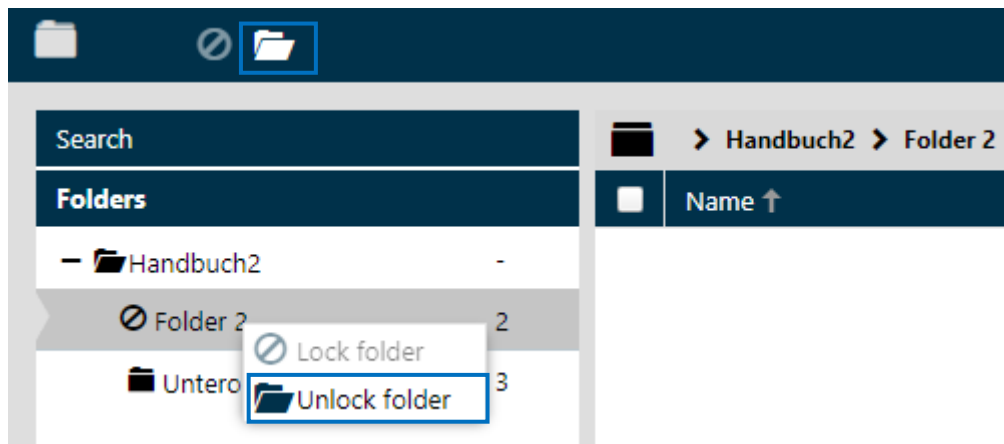
To do this, click on "Lock folder" in the action bar.



Action "Lock folder" also appears in the context menu.



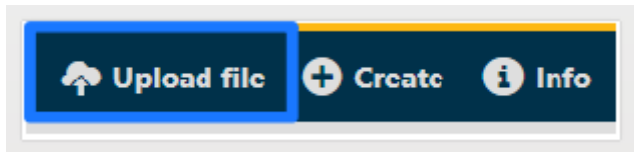
You can unlock these folders at any time and the folder will be available again with all of its files and rights.



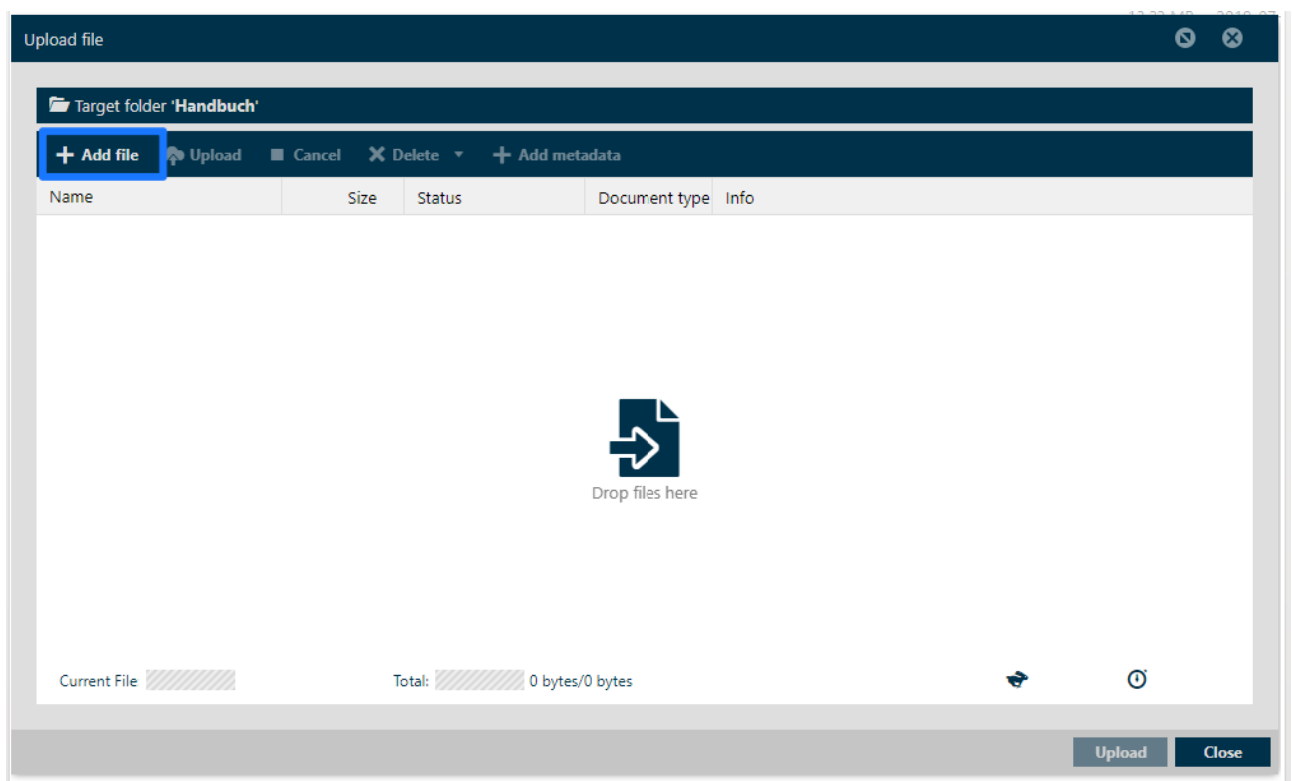


## 5.2 File operations

### 5.2.1 File upload

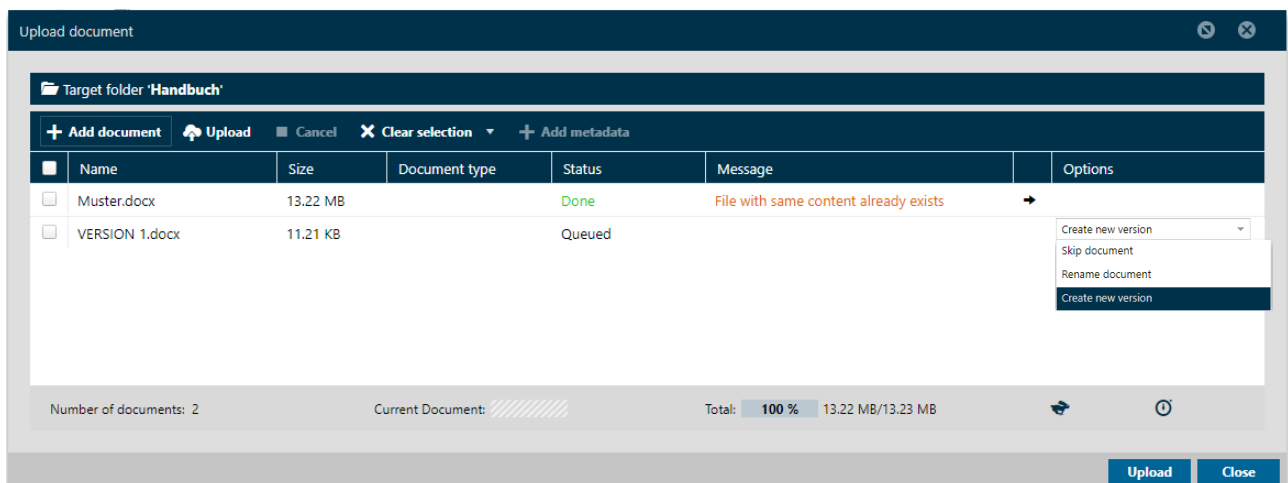


To upload documents into a folder, select the file and click into the action stripe „Upload file“, a window pops up, click „Add file“. You can now download documents.



If the document already exists, you can either create a new version of the document, Rename the document or skip the document. (The prerequisite for this is that the Versioning is activated). If a file is locked, a new version cannot be created.

If a document with the same content already exists in the data room you will get a yellow information message. You can jump directly to this document by clicking on the arrow behind this message. This is only an information and didn't affects the upload or the creation of new versions.



You can also select multiple files and delete them from the upload area. To do this, simply tick the checkboxes of the corresponding documents.

If you have the modul "metadata" you can add metadata before the upload. More Informations under: Administration → Dokument Settings and Administration → Metatag Settings.

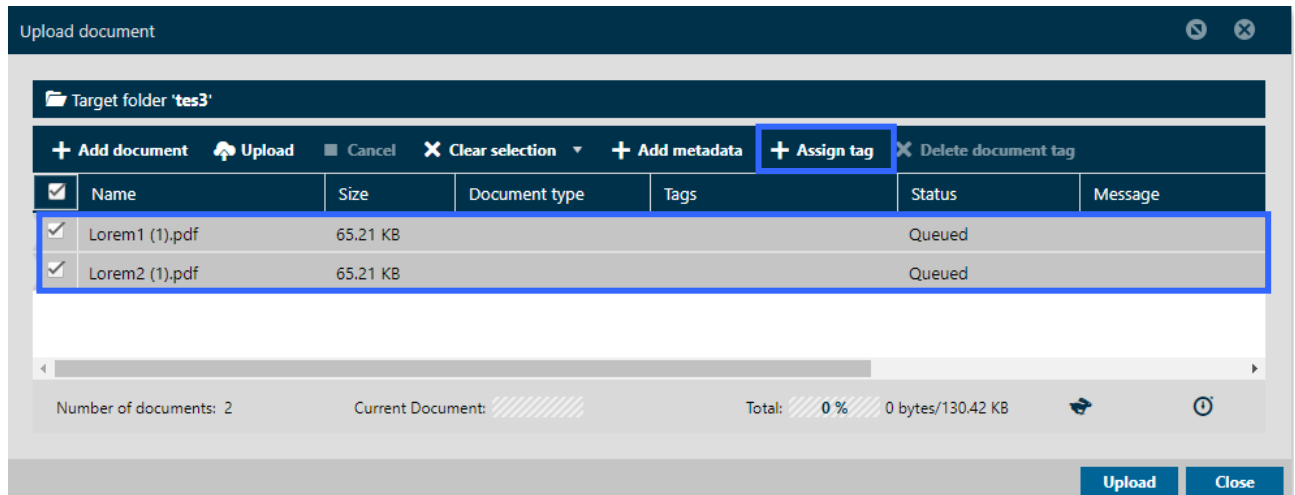
*Hint:* After the upload you cannot look to the preview. The documents will first converted. More about "Document view" under Datafunction → Preview.

## Tagging while uploading files

Tags can also be added while uploading documents. For more information on Tags, see "[Tagging files](#)".

These steps must be followed:

- Select one or more documents to upload
- In the upload window, select the documents that should get Tags and select "Assign tag" in the toolbar

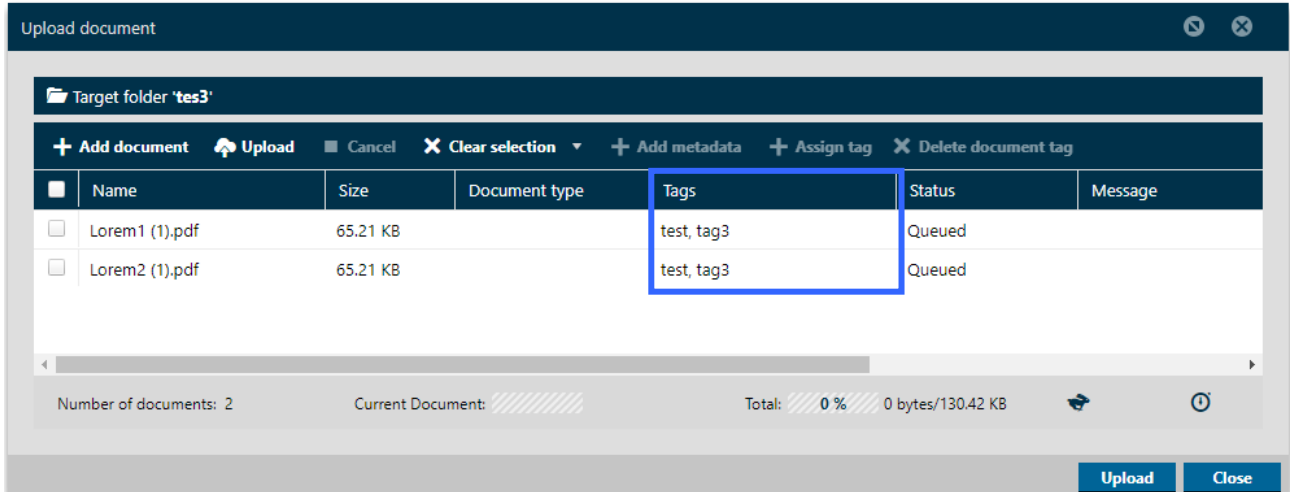


- a window opens in which already existing Tags can be selected and added
- You can also create new Tags here




- Then press save

The Tags will now be added to the corresponding documents and they will appear in the upload window in the "Tags" column.



The screenshot shows the 'Upload document' window with the target folder 'tes3'. The action bar includes buttons for '+ Add document', 'Upload', 'Cancel', 'Clear selection', '+ Add metadata', '+ Assign tag', and 'Delete document tag'. The table below shows two documents, both with the tag 'test, tag3' assigned. The 'Tags' column is highlighted with a blue box.

	Name	Size	Document type	Tags	Status	Message
<input type="checkbox"/>	Lorem1 (1).pdf	65.21 KB		test, tag3	Queued	
<input type="checkbox"/>	Lorem2 (1).pdf	65.21 KB		test, tag3	Queued	

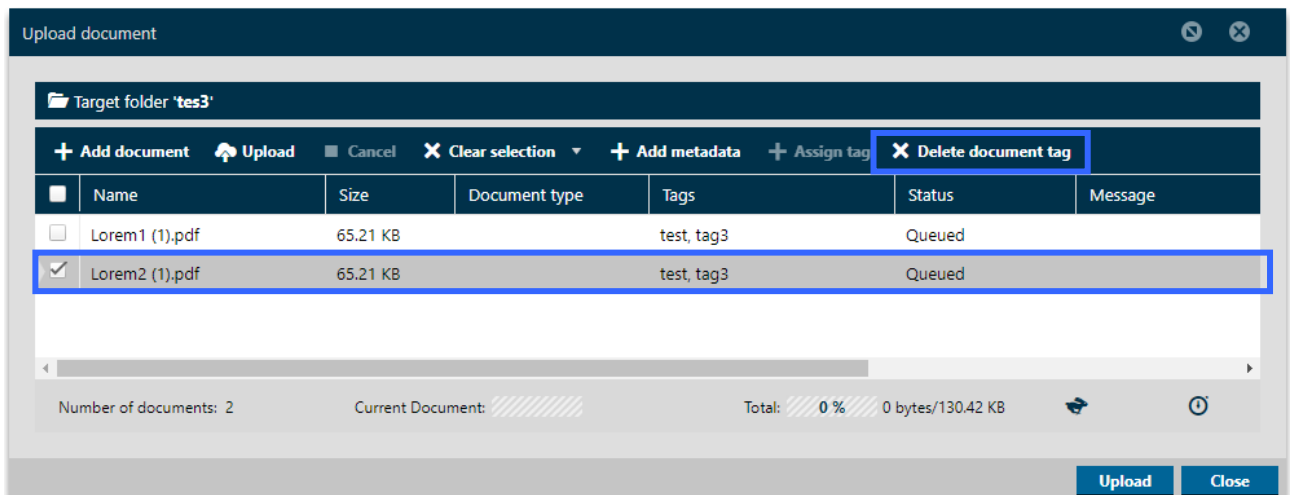
Number of documents: 2      Current Document:       Total: 0 % 0 bytes/130.42 KB

**Upload** **Close**

These Tags are now automatically set to the document when the file is uploaded.


If you have accidentally assigned a Tag to a file that should not have one, select the file and click on "Delete document tag" in the action bar.

However, this is only possible if the file has not yet been uploaded.



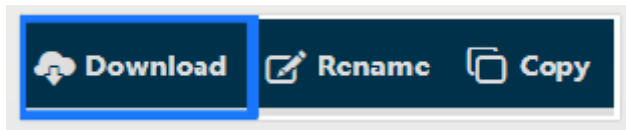
The screenshot shows the 'Upload document' window with the target folder 'tes3'. The action bar includes buttons for '+ Add document', 'Upload', 'Cancel', 'Clear selection', '+ Add metadata', '+ Assign tag', and 'Delete document tag'. The 'Delete document tag' button is highlighted with a blue box. The table below shows two documents, both with the tag 'test, tag3' assigned. The second document is selected with a checkbox.

	Name	Size	Document type	Tags	Status	Message
<input type="checkbox"/>	Lorem1 (1).pdf	65.21 KB		test, tag3	Queued	
<input checked="" type="checkbox"/>	Lorem2 (1).pdf	65.21 KB		test, tag3	Queued	

Number of documents: 2      Current Document:       Total: 0 % 0 bytes/130.42 KB

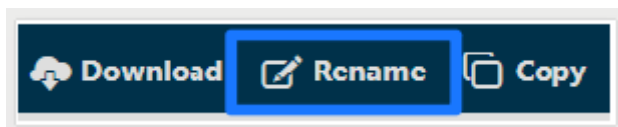
**Upload** **Close**

### 5.2.2 File download

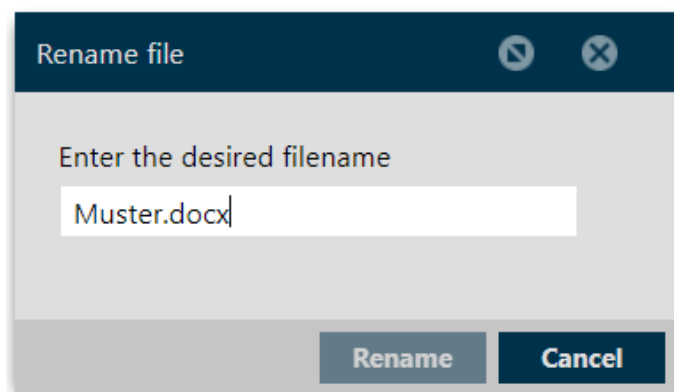


To download a file, select file and click „Download“ on the action strip.  
This action can be used for several documents at the same time.

### 5.2.3 Rename file

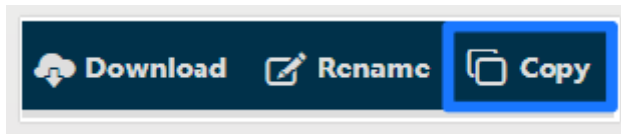


To rename a file, select file and click "Rename" on the action strip. A window will be displayed, you can now set the new file name.

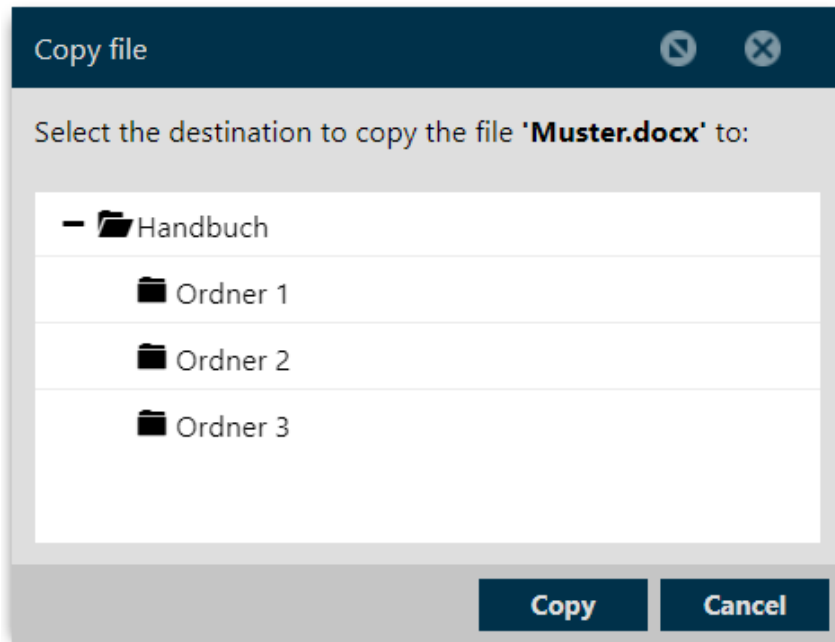


*Hint:* Please note, not to remove the file extension, otherwise the file will be unusable after downloading.

#### 5.2.4 Copy file

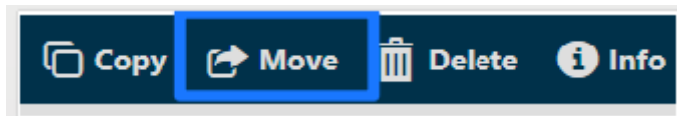


To copy a file, select file and click "Copy" on the actions strip. A window will be displayed afterwards.

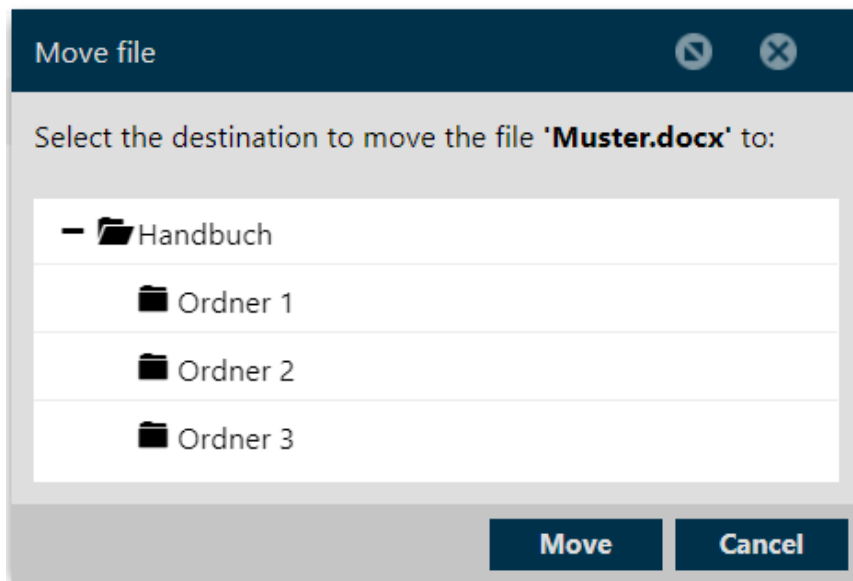


Select the destination, in which the file should be copied.  
This action can be used at the same time for several documents.

### 5.2.5 Move file



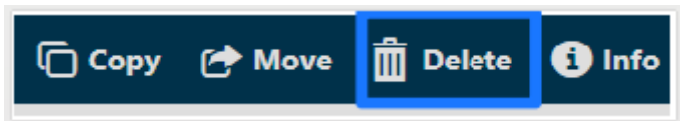
To move a file, select the file and go to „Move“.



Select the destination for the file to move.

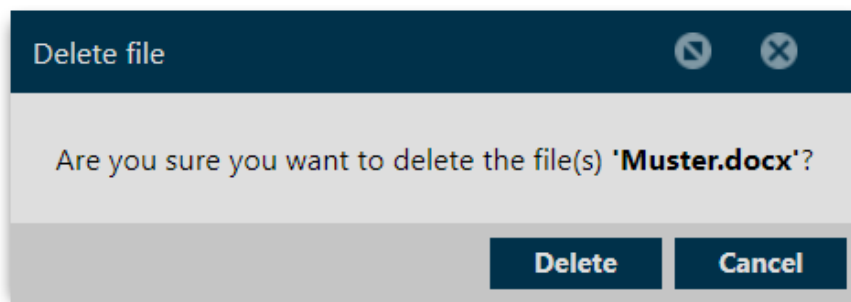
This action can be used at the same time for several documents.

### 5.2.6 Delete file



To delete a file, select the file and click "Delete".

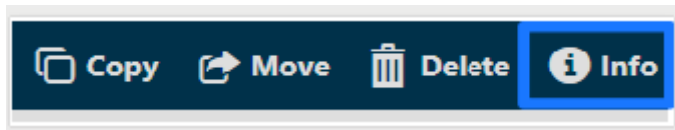
In case, the recycle bin is activated, the data will be moved into the recycle bin. Otherwise it will be deleted irrevocable.



This action can be used at the same time for several documents.



### 5.2.7 File informations



For data information, choose your data and click „Information“ in the action strip.

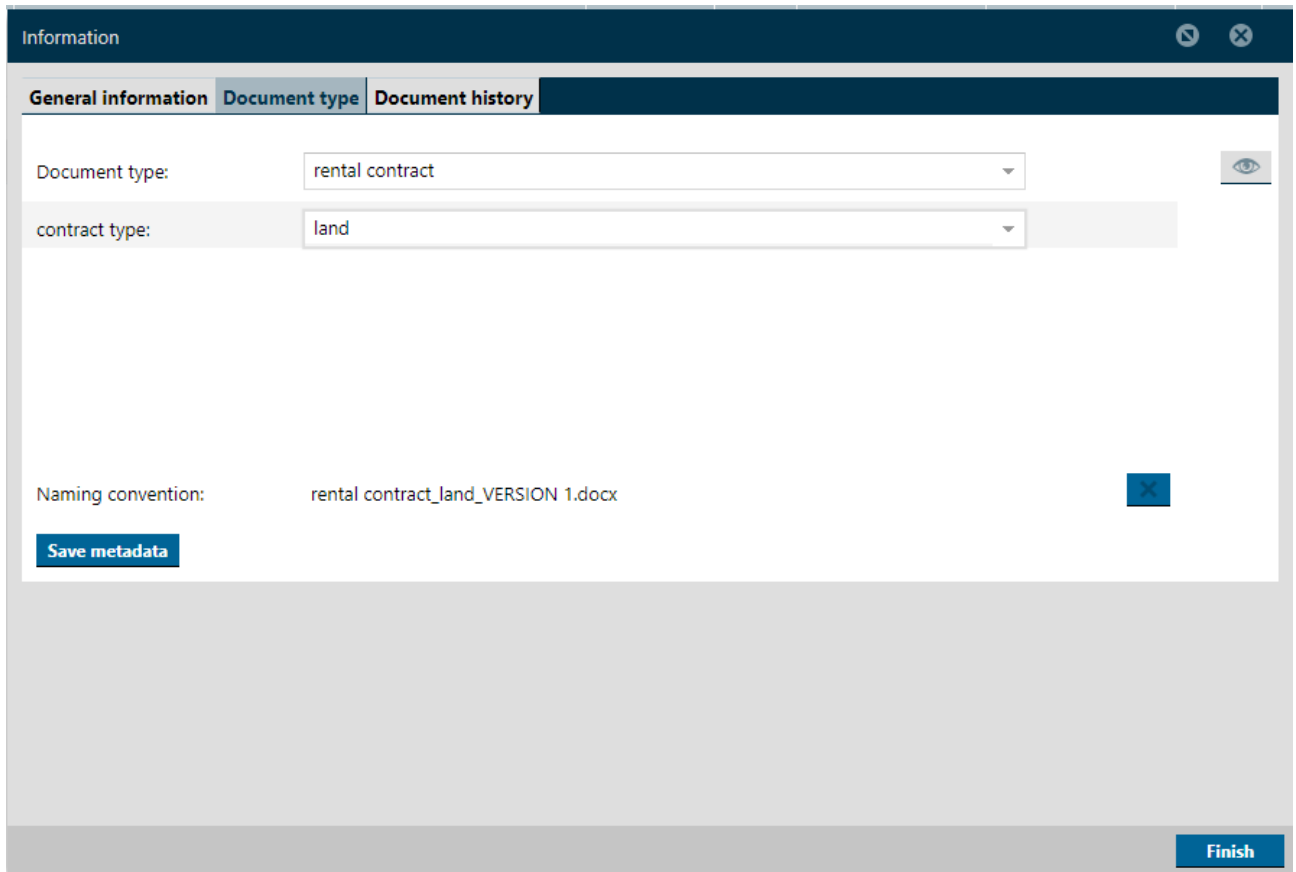
Information

General information	Document type	Document history
Document type	Microsoft Word 2003-Dokument (docx)	
Document name	VERSION 1.docx	
Size	11.2 KB	
Uploaded on	2022-10-10 09:48:14	
Document path	Handbuch/VERSION 1.docx	
Uploaded by	Handbuch, Handbuch	
Tags:	<div>word-datei x</div>	

Finish

A window pops-up afterwards.

Is the modul "metadata" activated, you can set document types and Metadata. To do this, switch to the "Document type" tab.



Information

General information Document type Document history

Document type: rental contract

contract type: land

Naming convention: rental contract\_land\_VERSION 1.docx

Save metadata


Finish

More Informations under: Administration → Document type Settings and Administrations → Metatags-Settings.

### 5.2.8 Tagging files

#### Set group rights

To use adding Tags to files you must first set the "View Tags" and "Edit Tags" group rights in the group rights.

☒ **Permissions** 

---

☐ View group rights

☐ Edit group rights

☐ View report rights

☐ Edit report rights

☐ View folder rights

☐ Edit folder rights

☐ View file rights

☐ Edit file rights

☐ View file metadata

☐ Edit file metadata

☐ Q&A edit object categories

☒ View Tags

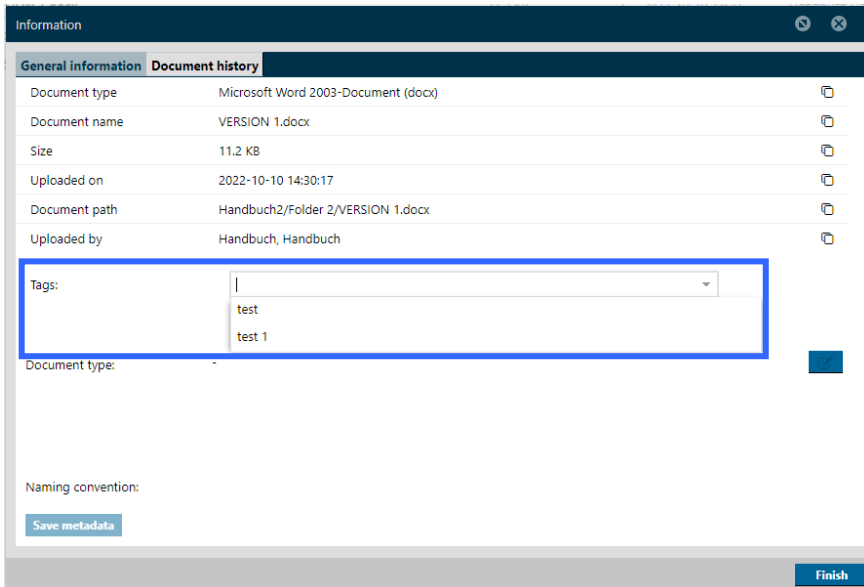
☒ Edit Tags

## File Information

Here you can assign the already existing Tags or create new ones.

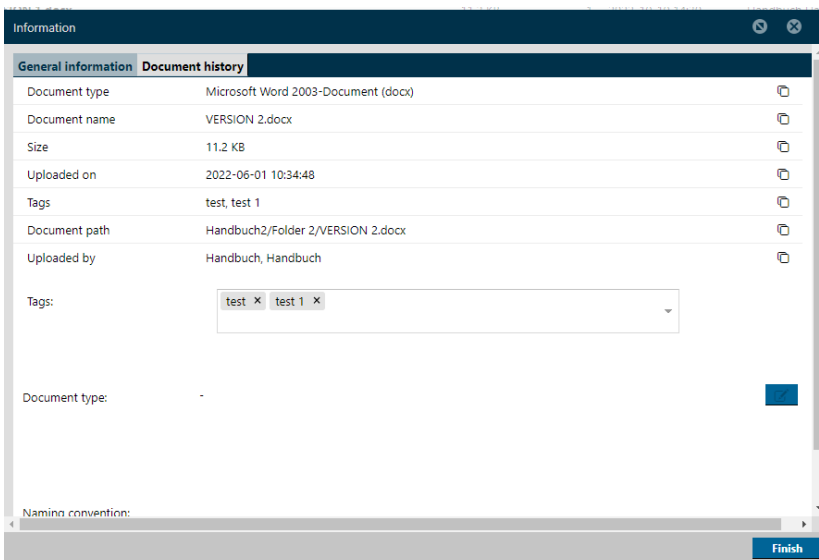
To assign existing Tags, simply select the corresponding Tags from the drop-down menu.

To create a new Tgas , click in the field, enter the name of the new Tag and confirm with the "Enter" key. The new Tag will be automatically created and assigned to the document.



Here you can see already assigned Tags of the document.

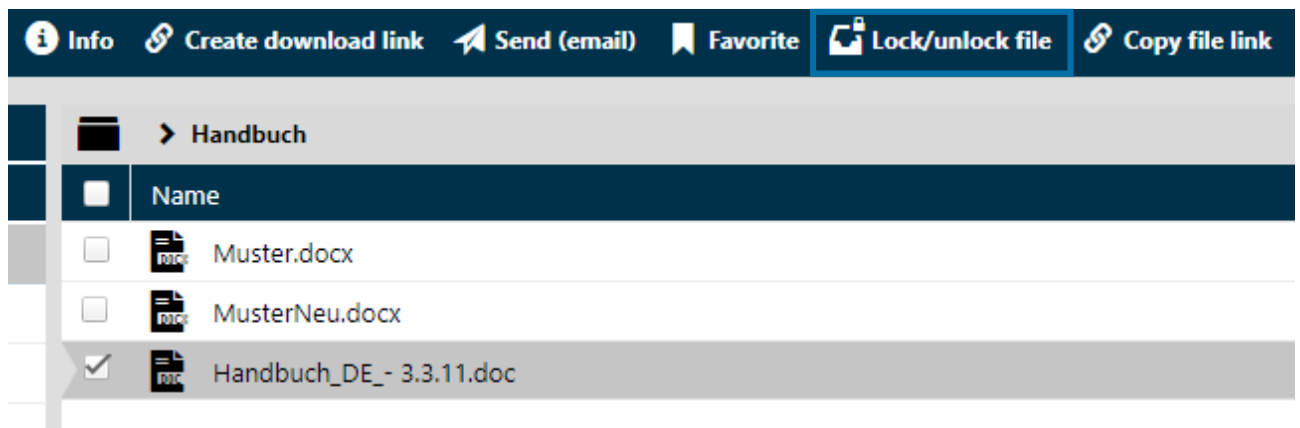
To delete them, just click the "x" at the end of the Tag and the Tag will be deleted from the document.



### 5.2.9 Lock file













Files can only be locked when versioning is active.



To lock a file you have to select a file and choose the action "Lock/Unlock file". To unlock a file perform the same action.



If a file has been locked, no new version of this file can be uploaded.

You can recognize locked files by the mark in the back of the document list.

	Name	Size	Pages	Created on	Created by ↑	Version	Document type	Info	View	Lock/Unlock
<input type="checkbox"/>	 Muster.docx	13.22 MB	354	2020-10-28 11:47	Handbuch Handb...	3	-			
<input type="checkbox"/>	 MusterNeu.docx	13.22 MB	354	2020-10-28 11:47	Handbuch Handb...	2	-			
<input checked="" type="checkbox"/>	 Handbuch_DE_- 3.3.11.doc	17.94 MB	115	2019-10-29 14:00	Handbuch Handb...	1	-			

 not Locked  
 locked

## 5.2.10 Document history

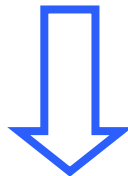
If versioning is active, you can also view the document history in the information area of the file. You can preview or download any previous version.

Information

General information
Document history

File name	MusterNeu.docx	
Size	13.22 MB	
Uploaded on	2020-10-28 11:47:03	
File path	Handbuch/MusterNeu.docx	
Uploaded by	Handbuch, Handbuch	
Document type:		

Save metadata
Finish

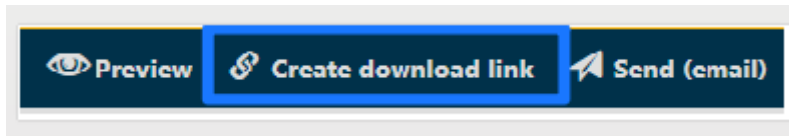


Information

General information
Document history

Document name	Created on	Created by	Size	Version		
MusterNeu.docx	2020-10-28 11:47	Handbuch Handbuch	13.22 MB	2		
MusterNeu.docx	2019-10-29 13:33	Handbuch Handbuch	13.22 MB	1		

### 5.2.11 Create download link



To create a download link, click „Create download link“.

Add the contact details, or choose an existing contact of your contact list and choose the link expiring date. You can set also, how often the link can be used.

You can also choose whether you want to pack all files as a zip file so only one link is sent for all selected files.

You can also choose whether the latest version should always be available for download or the currently selected one.

**Download link(s)**

Here you can create download links from the file(s) "**Muster.docx, MusterNeu.docx**". With this links the file(s) can be downloaded directly without a login.  
Optionally you could send the links to your contacts by email.

Expires\*:

Link type\*:  
☒ Link is usable just one time  
☐ Link can be used multiple times

Pack all files as zip: ☐

Document version:  
☒ Always use the latest version of the document  
☐ Always use the following versions of the documents:  
Version 3 of Muster.docx  
Version 2 of MusterNeu.docx

**Send links by email** **Only show links**

Choose the recipients from your contacts:

You can edit the contact list in your user settings under 'Contacts'.

You can also send to a new contact.

Email:

**Send Download link** **Cancel**

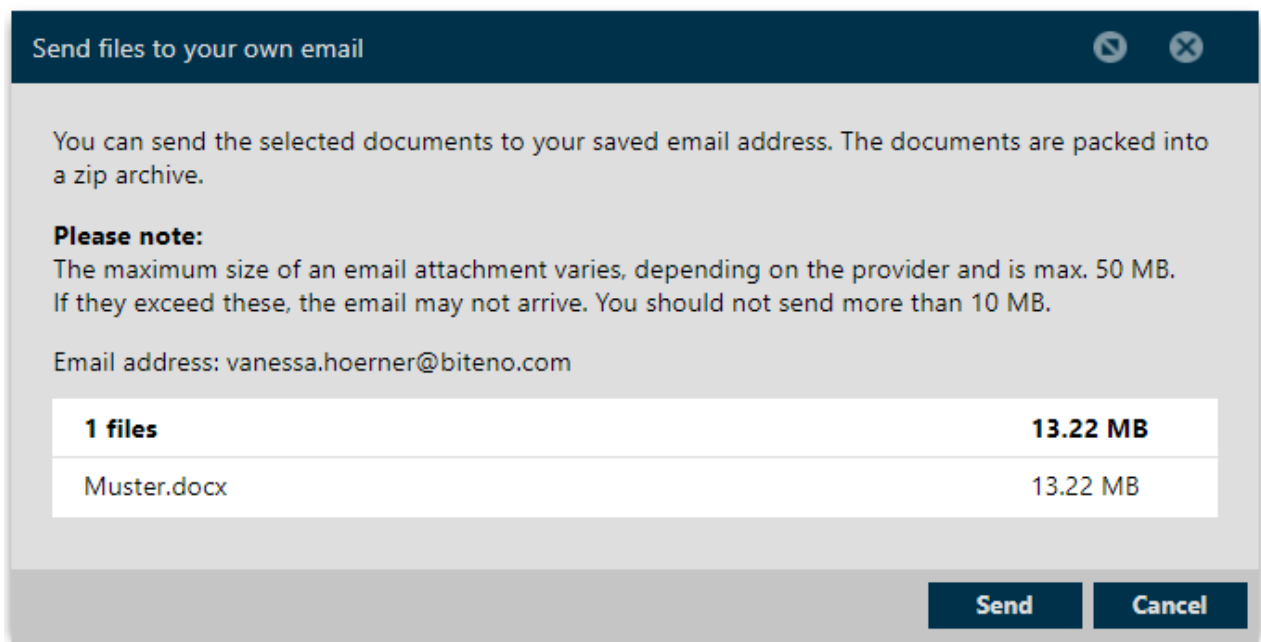
*Hint:* Several contacts can be selected of your contacts.



### 5.2.12 Send file by email



To send a file to your e-mail address, select file and click "Send (email)" in the action strip  
A window will be displayed with an overview of files to send.



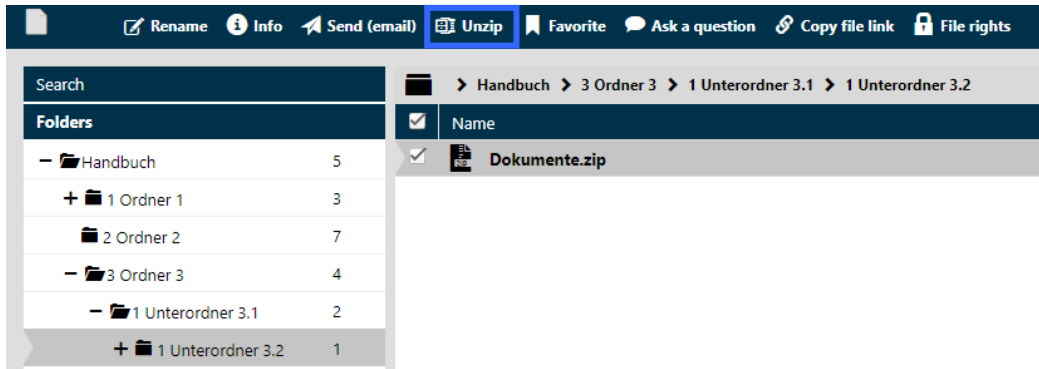
This action can be used at the same time for several documents.

*Hint:* Documents over 50 MB can not be sent.

### 5.2.13 Unzip File

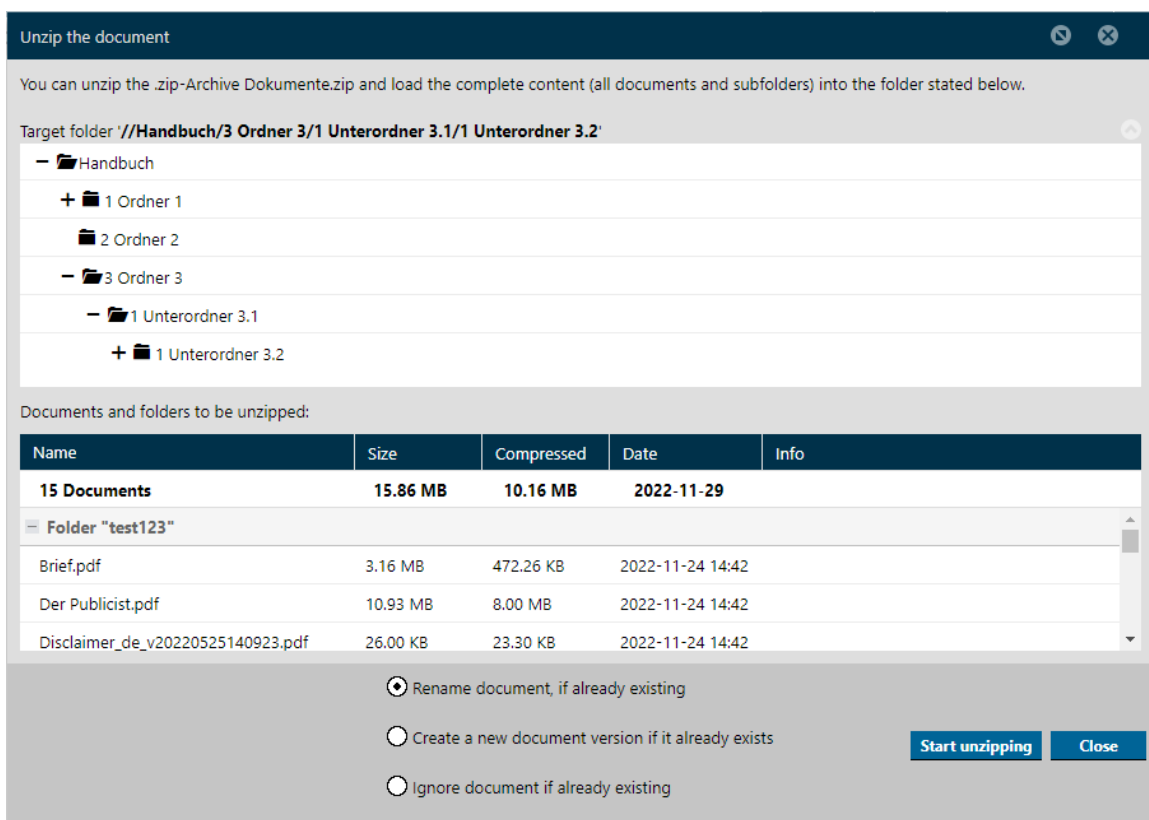
If you load a zip file into your data room, you can also unpack it in the data room, provided you have the corresponding module.

To do this, select the zip file and click on "Unzip" in the action bar.



A window opens in which you can select the Target folder.

The documents and folders to be unpacked are listed and you can select what should happen to existing documents.

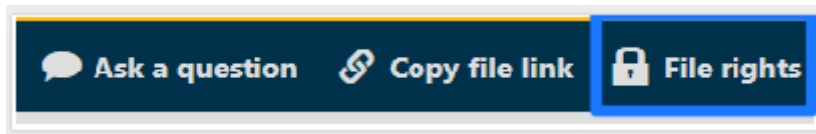


Now click „Start unzipping“.

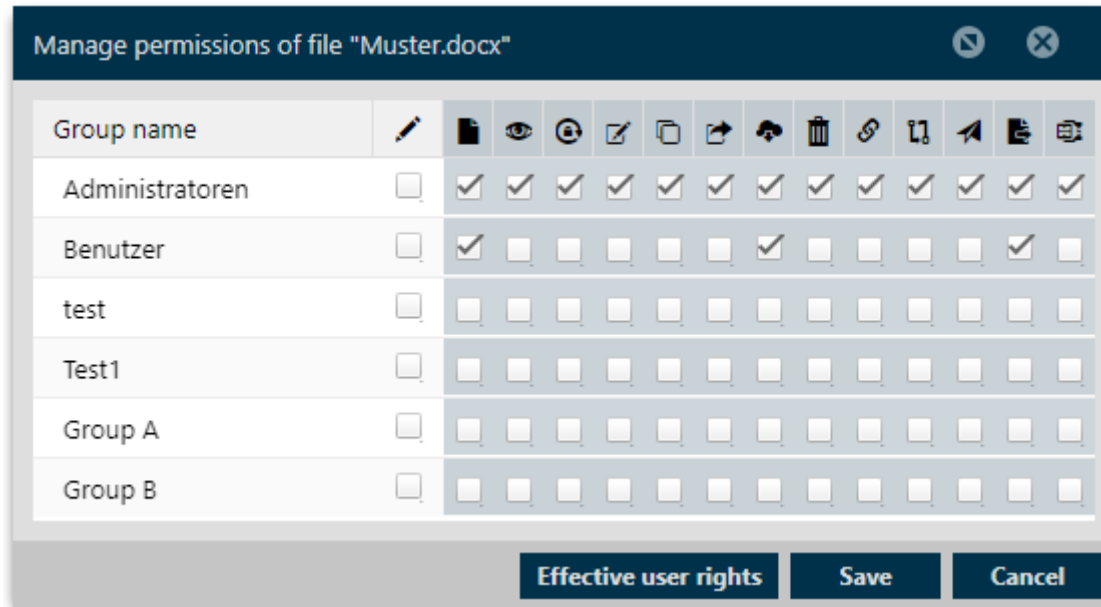
The folder with the corresponding documents will now be created at the location you selected before and the documents will be stored there.

Search	> Handbuch > 3 Ordner 3 > 1 Unterordner 3.1 > 1 Unterordner 3.2 > 1 Neuer Unterordner 3.3 > 1 Neuer Unterordner 3.4		
Folders	Name	Size	Pages
- Handbuch	<input type="checkbox"/> Brief.pdf	3.16 MB	4
+ 1 Ordner 1	<input type="checkbox"/> Der Publicist.pdf	10.93 MB	24
2 Ordner 2	<input type="checkbox"/> Disclaimer_de_v20220525140923.pdf	26.0 KB	1
- 3 Ordner 3	<input type="checkbox"/> Disclaimer_de_v20221118085715.pdf	26.0 KB	1
- 1 Unterordner 3.1	<input type="checkbox"/> Disclaimer_en_v20220525140923.pdf	26.0 KB	1
- 1 Unterordner 3.2	<input type="checkbox"/> Disclaimer_en_v20221118085715.pdf	26.0 KB	1
- 1 Neuer Unterordner 3.3	<input type="checkbox"/> Lorem1 (1).pdf	65.2 KB	15
- 1 Neuer Unterordner 3.4	<input type="checkbox"/> Lorem2 (1).pdf	65.2 KB	15
1 Neuer Unterordner 3.5	<input type="checkbox"/> Report 2022-09-14 (2).xlsx	5.3 KB	7
2 test 123	<input type="checkbox"/> Report_documentlist_20221013135052.xlsx	6.5 KB	3
	<input type="checkbox"/> Report_documentlist_20221013135348.xlsx	6.7 KB	3
	<input type="checkbox"/> difuBericht1996.pdf	1.45 MB	24
	<input type="checkbox"/> file-9-1-1-2.pdf	10.5 KB	13
	<input type="checkbox"/> test - Kopie (2) - Kopie.txt	4 bytes	1
	<input type="checkbox"/> wasserzeichen.PNG	59.1 KB	1

### 5.2.14 File permissions



To set group permissions for files, select file and click "File rights" on the action strip.

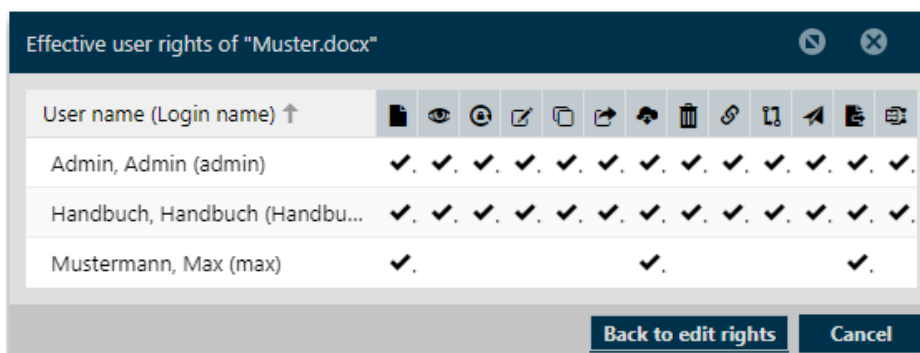


Permissions for every group are shown.

Select the permission for the group by activating/deactivating the checkbox.





*Hint:* By holding the cursor on the icon symbol, you will see the name of the action.

To obtain access information, click on "Effective user rights" and you will receive a list of people and their rights to this file.







### 5.2.15 File preview

Is the icon „eye“ displayed on the right side in the document list, a preview of the file is available.

Search		> Handbuch > Ordner 3							
Folders		<input type="checkbox"/>	Name ↑	Size	Created on	Created by	Document type	Pages	
–	Handbuch							1	
	Ordner 1							3	
	Ordner 2							1	
	Ordner 3							3	
<input type="checkbox"/>	Dokument1.txt			11.25 KB	2019-07-19 10:21	Handbuch Handbuch	-	3	
<input type="checkbox"/>	loremipsum.txt			116.43 MB	2019-07-19 10:21	Handbuch Handbuch	-	-	
<input type="checkbox"/>	Test.txt			7.91 KB	2019-07-19 10:22	Handbuch Handbuch	-	2	

Is the icon “eye” not displayed”, no preview is available.

Search		> Handbuch > Ordner 3							
Folders		<input type="checkbox"/>	Name ↑	Size	Created on	Created by	Document type	Pages	
–	Handbuch							1	
	Ordner 1							3	
	Ordner 2							1	
	Ordner 3							3	
<input type="checkbox"/>	Dokument1.txt			11.25 KB	2019-07-19 10:21	Handbuch Handbuch	-	3	
<input type="checkbox"/>	loremipsum.txt			116.43 MB	2019-07-19 10:21	Handbuch Handbuch	-	-	
<input type="checkbox"/>	Test.txt			7.91 KB	2019-07-19 10:22	Handbuch Handbuch	-	2	

A preview will be displayed after the uploading. It takes several minutes.

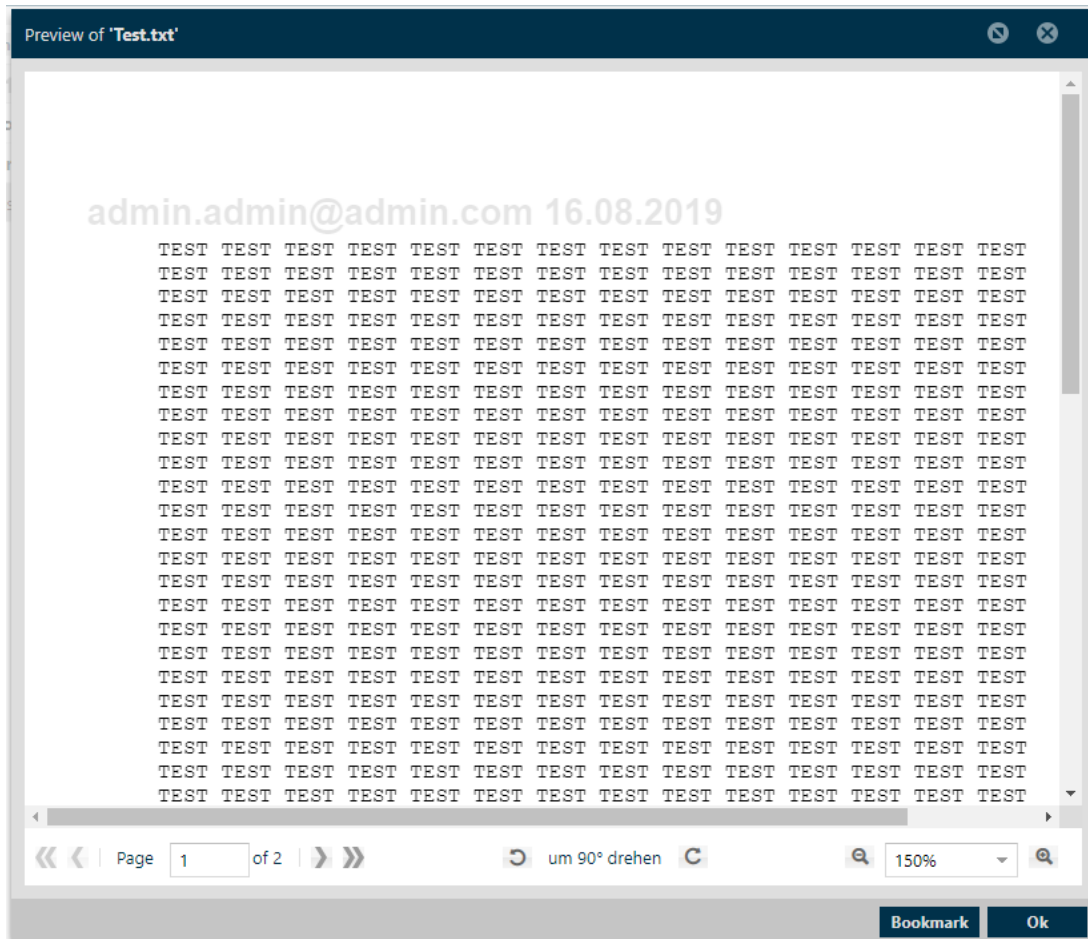
The preview is possible for following file endings:

- pdf
- doc
- docx
- xls
- xlsx
- pps
- ppsx
- ppt
- pptx
- msg
- png
- jpg
- jpeg
- gif
- tiff
- bmp
- html
- htm
- rtf
- txt
- eml

To view a file, click in the action strip „Preview“, alternative you can make a double click on the file.

### 5.2.16 Secure Viewer

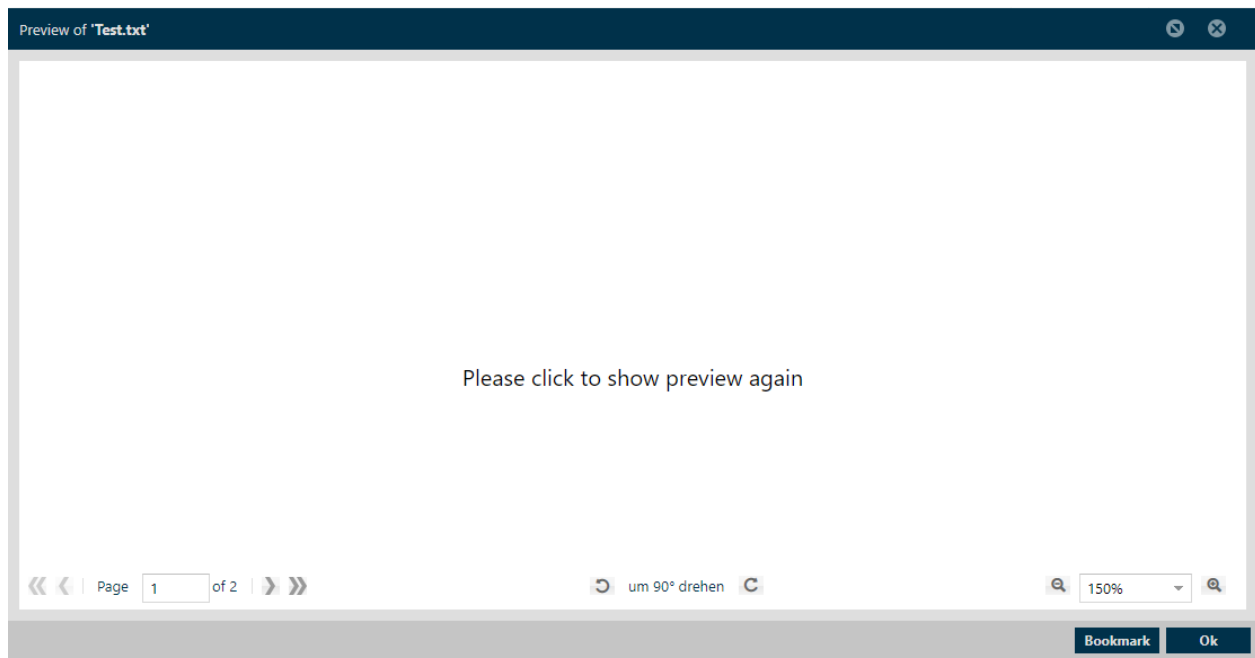
To secure a document, with the module „Secure Viewer“ you can show an individual watermark. The watermark will be visible in the preview.



To create a water mark, go to "Administration, General Settings → Watermark

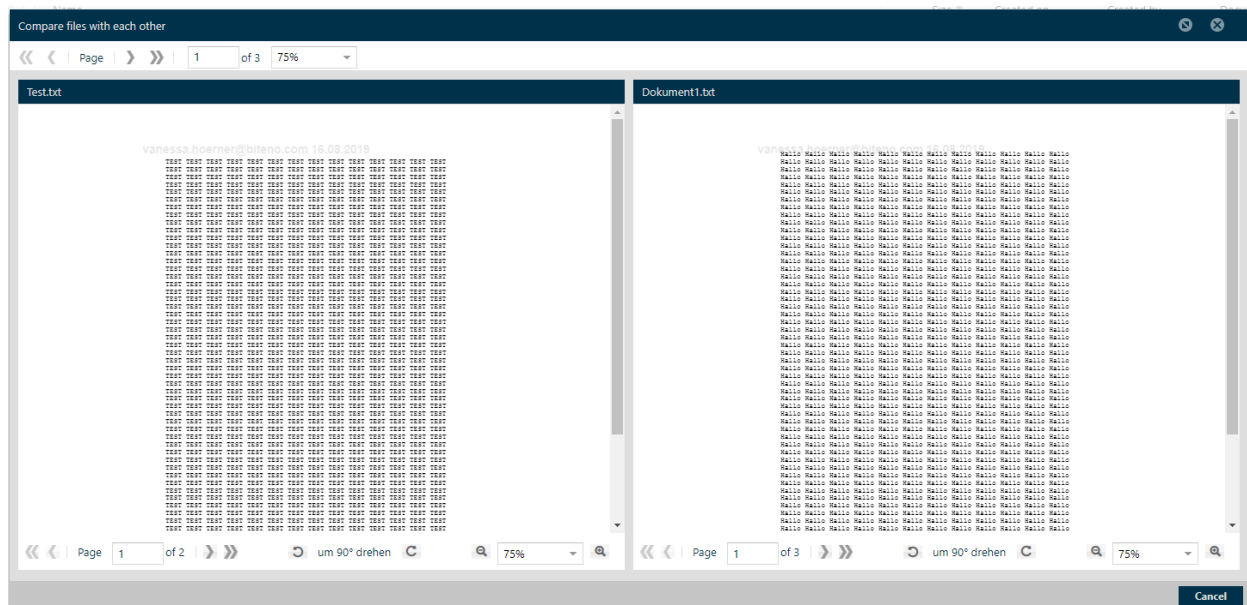
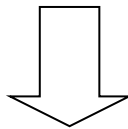
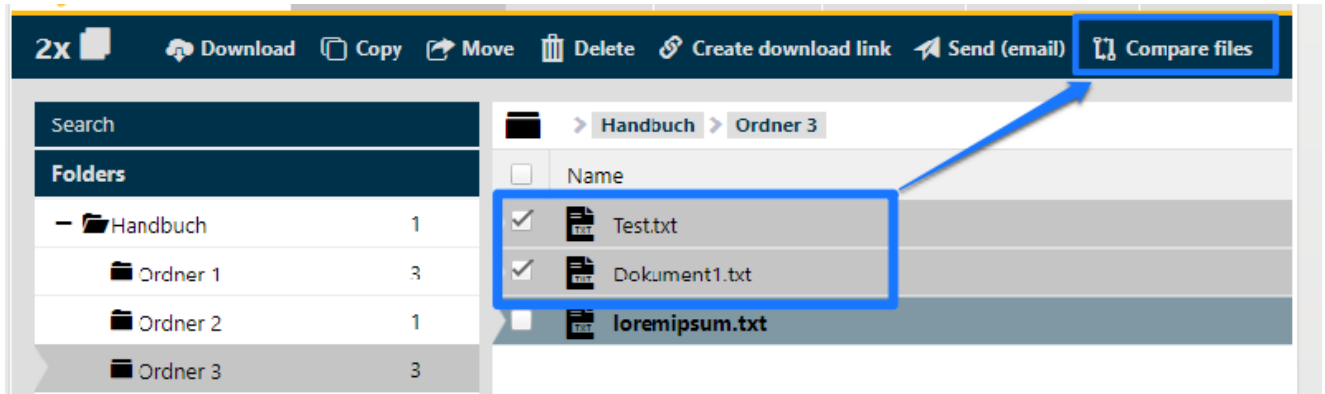
**Additional protection for the document preview:**

- It is prevented that the preview can be printed out
- The preview is hidden when you exit the browser window
- The preview cannot be printed (not even with "Ctrl + P")



### 5.2.17 Compare files

Compare files With the module „DocuCompare“ you will have the possibility, to watch and compare two files at the same time. Select therefore the file and click in the action strip “Compare files.”



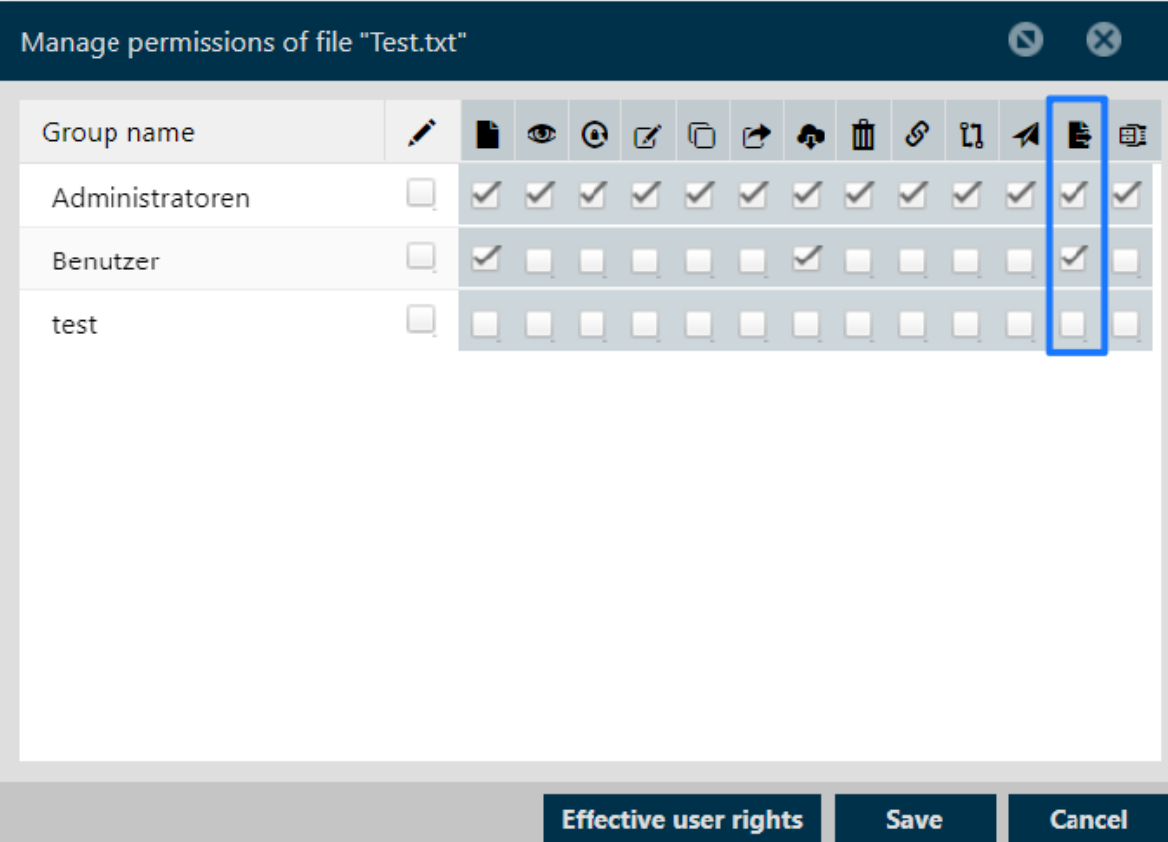
Add watermark to share files To download a file and the Secure Viewer is activated, the file will be saved automatically as pdf with a watermark.

The same happens, if you sent a document to your e-mail address.



### 5.2.18 Watermark when downloading and sending to your own email

To get the original documents, you have to select on the file permissions „Manage permissions of the file „Test.txt“.







Group name		Download	Print	View	Comment	Copy	Paste	Move	Delete	Share	Link	Mail	Print	Print
Administratoren	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Benutzer	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Effective user rights    Save    Cancel

## 5.3 Search

Click "Search" on the tab.

Search	
Folders	
–  Handbuch	1
 Ordner 1	3
 Ordner 2	1
 Ordner 3	3

You can search for folder names and/or documents. If you have the module "Meta-Data", you can search for meta informations or Document contents.

Additionally you can filter for document features.

You can limit the search results to a folder, its subfolders, all folders or the recycle bin.

Objects to search

☒ Folder name

☐ Document name

☐ Meta information

☐ Document contents

Search places

☐ Search only in current folder

☐ Search in current folder and subfolders

☒ Search in all folders

☐ Recycle bin

Search Save Reset

You can also save your searches. To do this, after you have selected all the options you need, click on the "Save" button.

Save search

Name

test

Ok Cancel

You can give the search setting its own name and save it.

### Search

Objects to search

☒ Document name

☒ Document contents

☒ Folder name

☐ Meta information

Search places

☐ Search only in current folder

☐ Search in current folder and subfolders

☒ Search in all folders

☐ Recycle bin

Search for: ""

Name	Fold

Favorites

Bookmark

Search

The search is saved under favorites and bookmarks.

Double-click on the name to get the search you have saved. Right-clicking on the name opens the context menu and you can delete the search.

Search

Name
test

Search

Name
test

### 5.3.1 Search for Tags

Of course, you can also search for Tags. To do this, you only need to check the "File tags" box in the Objects to search box.

Search

te

Objects to search

☐ Document name
 ☐ Document contents
 ☒ File tags
 ☐ Folder name
 ☐ Meta information

Search places

☐ Search only in current folder  
tes3
☐ Search in current folder and subfolders  
tes3
☒ Search in all folders
 ☐ Recycle bin

Search

Save

Reset

All files containing this Tag will appear in the search result.

t

Objects to search

☐ Document name
 ☐ Document contents
 ☒ File tags
 ☐ Folder name
 ☐ Meta information



Search places

☐ Search only in current folder  
tes3
☒ Search in current folder and subfolders  
tes3
☐ Search in all folders
 ☐ Recycle bin

Search

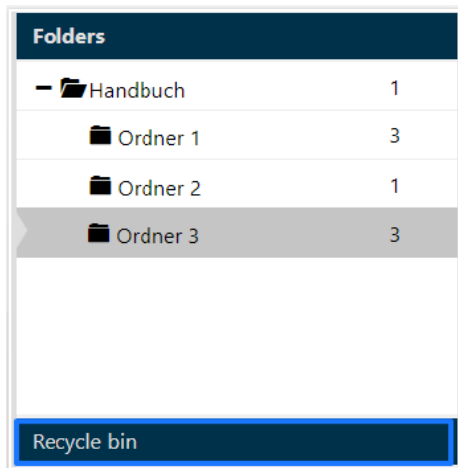
Save

Reset

	Name	Folder path	Search results	Size	Pages
				2 results for "docTags"	
<input type="checkbox"/>	 test - Kopie.txt	Test/tes3	tag 2, tag3	4 bytes	-
<input type="checkbox"/>	 test - Kopie(1).txt	Test/tes3	test, tag3	4 bytes	-

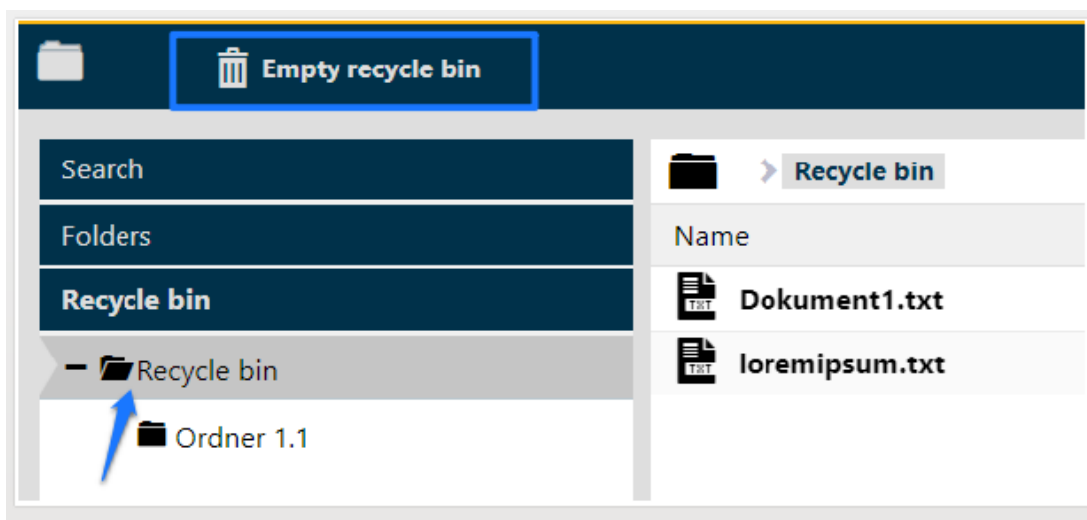
## 5.4 Recycle bin

To use the recycle bin, click „recycle bin“



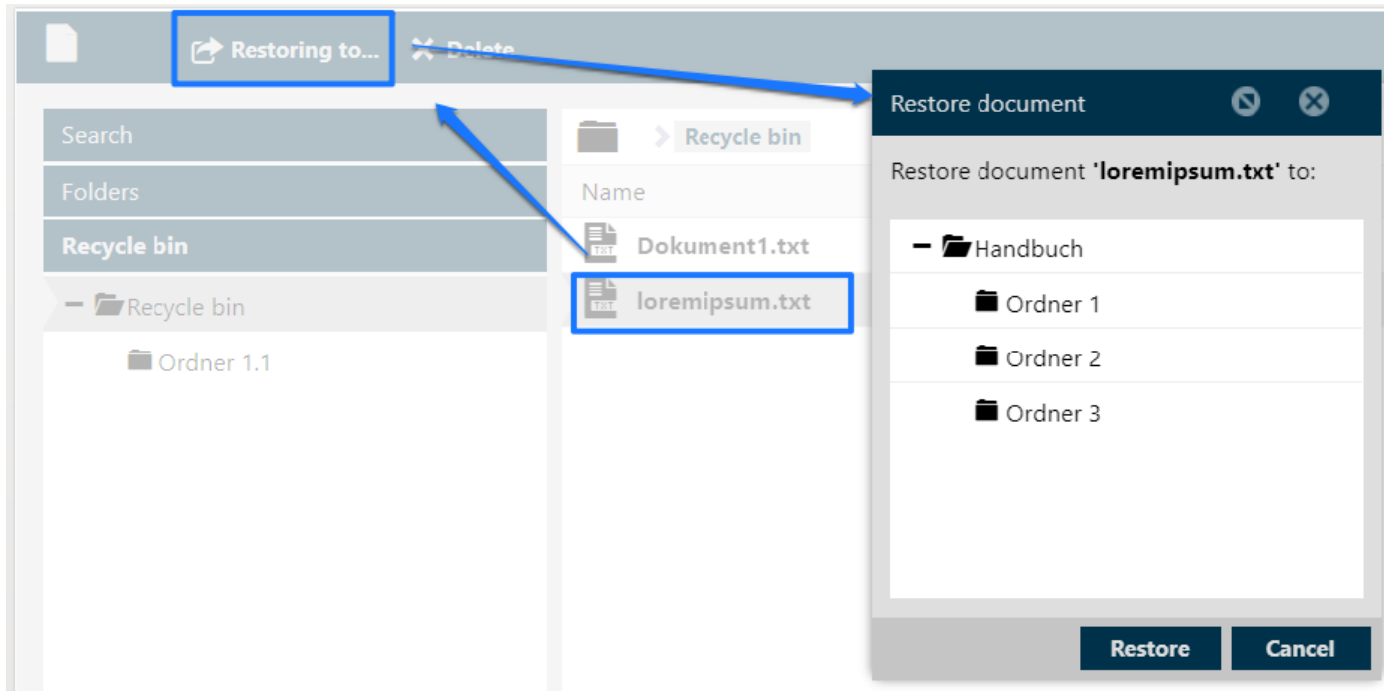
### 5.4.1 Empty recycle bin

Is the folder „Recycle bin“ selected, you can click in the action strip „Empty recycle bin“. All elements will be deleted permanently.

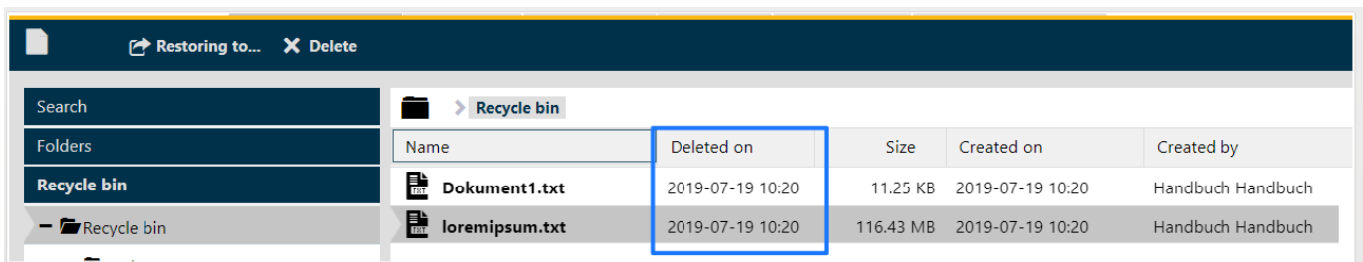


### 5.4.2 Restore folder/file

To restore a folder/file, select the folder/file and go in the action strip to „restoring to..“. A window pops up, where you can select, in which register the folder/file should be restored.












The recycle bin shows the deletion date of documents and files.



The screenshot shows the 'Recycle bin' view in the Docurex interface. It displays a table with columns: 'Name', 'Deleted on', 'Size', 'Created on', and 'Created by'. The table contains two rows of data: 'Dokument1.txt' and 'loremipsum.txt'. The 'Deleted on' column for both files shows the date '2019-07-19 10:20'. The 'Size' column shows '11.25 KB' for 'Dokument1.txt' and '116.43 MB' for 'loremipsum.txt'. The 'Created on' column shows '2019-07-19 10:20' for both files. The 'Created by' column shows 'Handbuch Handbuch' for both files. A blue box highlights the 'Deleted on' column.

Name	Deleted on	Size	Created on	Created by
Dokument1.txt	2019-07-19 10:20	11.25 KB	2019-07-19 10:20	Handbuch Handbuch
loremipsum.txt	2019-07-19 10:20	116.43 MB	2019-07-19 10:20	Handbuch Handbuch

File information shows, who deleted the file.

Information		
Folder name	Ordner 1.1	
Folder path	recycleBin/Ordner 1.1	
Number of subfolders	0	
Number of files	3	
Deleted on	2019-06-14 09:43:12	
Deleted by	Handbuch, Handbuch	
Created on	2019-03-01 11:57:53	
Created by	Handbuch, Handbuch	
Size	154.6 KB	

Total size
Show folder structure
Finish

### 5.4.3 Display the deletion date

The recycle bin shows the deletion date of documents and files.

Restoring to... X Delete					
Search	Recycle bin				
Folders					
Recycle bin					
Recycle bin					
Name	Deleted on	Size	Created on	Created by	
Dokument1.txt	2019-07-19 10:20	11.25 KB	2019-07-19 10:20	Handbuch Handbuch	
loremipsum.txt	2019-07-19 10:20	116.43 MB	2019-07-19 10:20	Handbuch Handbuch	

The folder and file information also shows who deleted the folder / file.

### Folder Information:

Information

Folder name	Ordner 1.1	
Folder path	recycleBin/Ordner 1.1	
Number of subfolders	0	
Number of files	3	
Deleted on	2019-06-14 09:43:12	
Deleted by	Handbuch, Handbuch	
Created on	2019-03-01 11:57:53	
Created by	Handbuch, Handbuch	
Size	154.6 KB	

Total size
Show folder structure
Finish

### File Information:

Information

General information
Document history

Document type	Text (txt)	
Document name	Dokument1.txt	
Size	11.3 KB	
Uploaded on	2019-07-19 10:20:21	
Deleted by	Handbuch, Handbuch	
Deleted on	2019-07-19 10:20:45	
Document path	Recycle bin/Dokument1.txt	
Uploaded by	Handbuch, Handbuch	

Document type:

Naming convention:

Finish

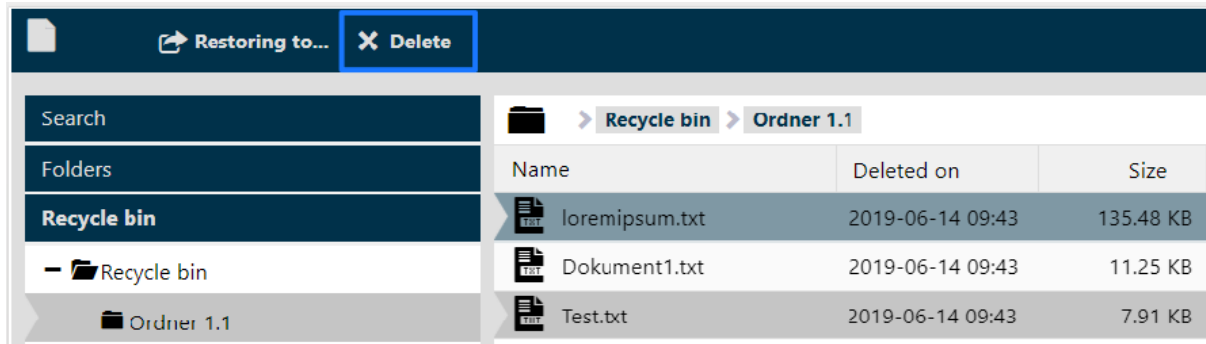
You can also rename or delete the created zip.

The files are automatically deleted after their availability has expired

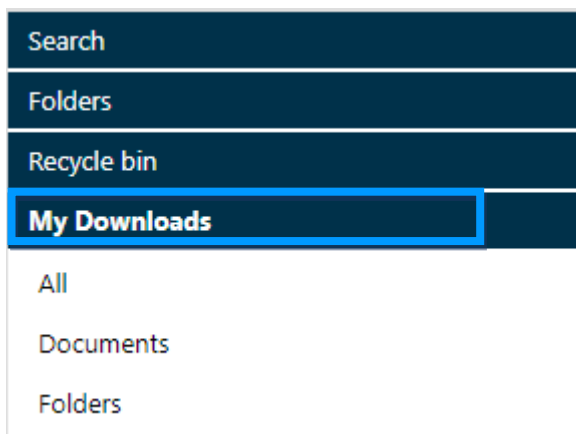


#### 5.4.4 Delete

To delete a folder/file, select folder/file und click „Delete“ in the action strip. A window pops up to confirm the deletion. The folder/file will be deleted irreversible.



### 5.5 My Downloads

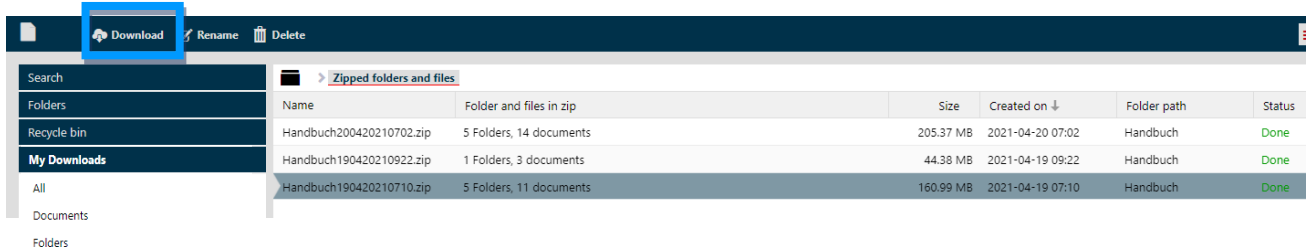


Here you will find all downloads of the last 3 days.

It is listed:

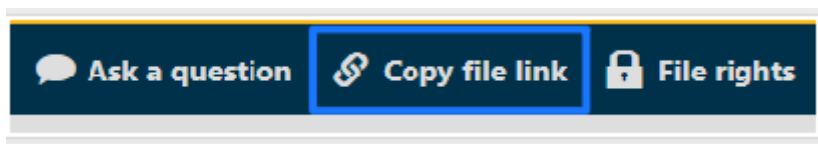
- as the created zip file is called
- how many folders and documents are in it
- the size of the file
- the date when everything was created
- the corresponding folder path
- the status of the zip process and until when the download is available.

When the status is "Done", you can select the appropriate file and download it.

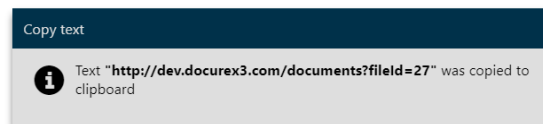


Name	Folder and files in zip	Size	Created on ↓	Folder path	Status
Handbuch200420210702.zip	5 Folders, 14 documents	205.37 MB	2021-04-20 07:02	Handbuch	Done
Handbuch190420210922.zip	1 Folders, 3 documents	44.38 MB	2021-04-19 09:22	Handbuch	Done
Handbuch190420210710.zip	5 Folders, 11 documents	160.99 MB	2021-04-19 07:10	Handbuch	Done

## 5.6 Copy file link



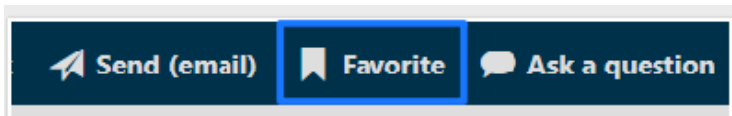
If you have selected the document click „Copy file link“ and it will be filed in the clipboard. You can copy it directly from the info-box.

Copy text

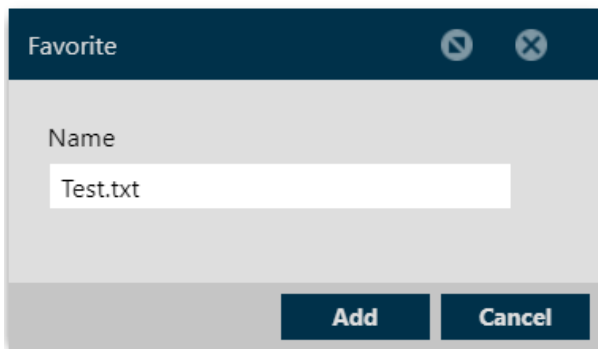
Text "<http://dev.docurex3.com/documents?fileId=27>" was copied to clipboard

## 5.7 Create favorites

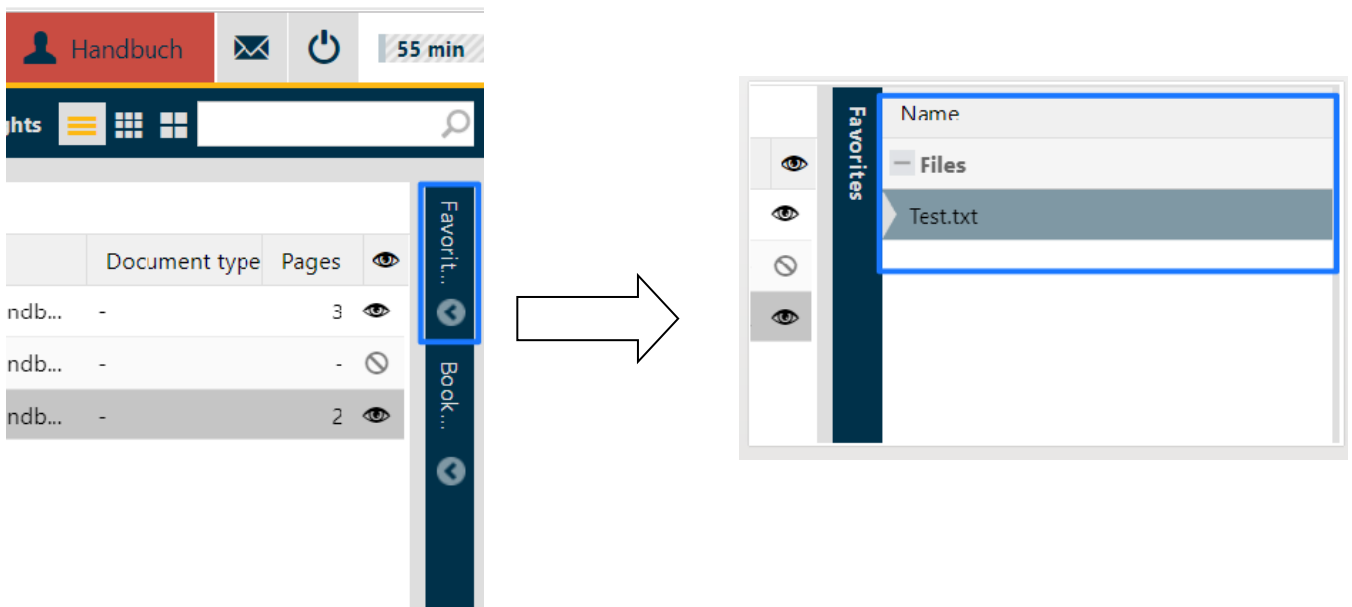


You can mark files and folders as favorites.

Select the required folder/file und click „create favorite“.



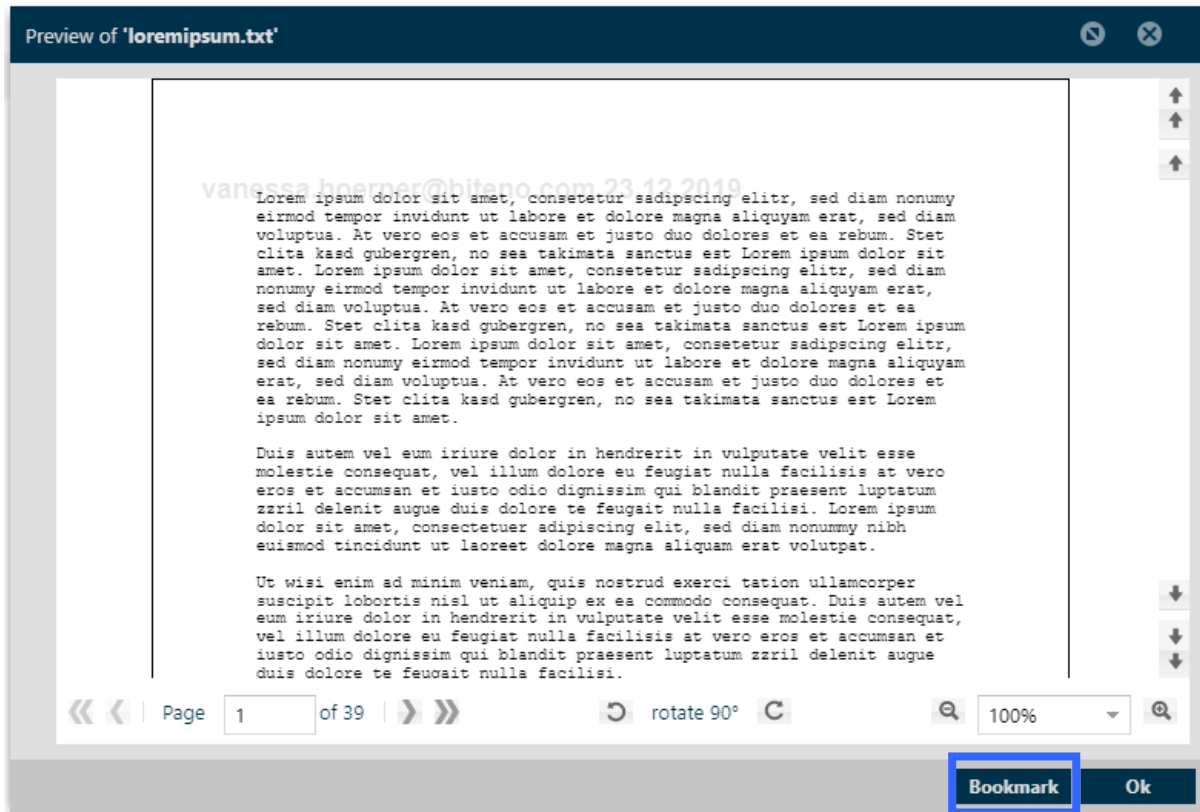
You can assign a name for the document and add to favorites.



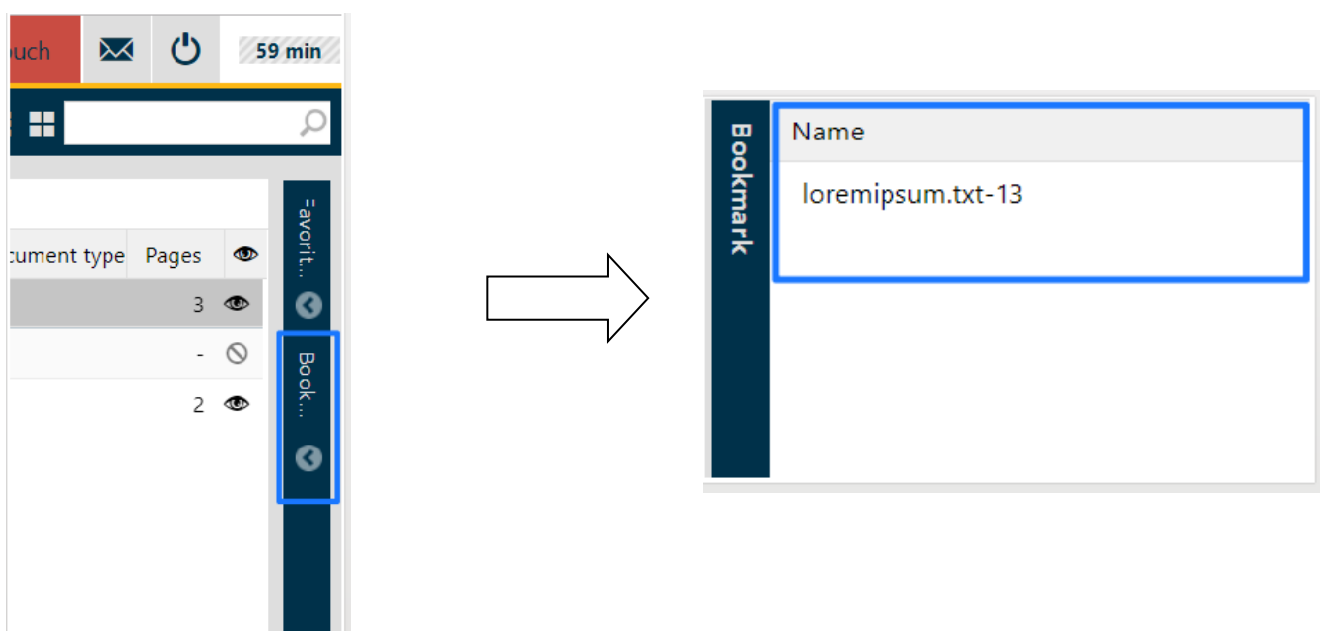
On the right hand side of the browser window you can see the tab „Favorites“. On click it shows the saved favorites sorted by files and folders.

## 5.8 Create bookmark

If you open the preview, you can create a bookmark.



The bookmark will be saved in the tab „bookmark“. With double click of the bookmark you will get to the labelled register.



## 6 Metadata

You can add metadata to your documents during or after the uploading. Therefore there are documents types and metatags. Metatags can be assigned to document types.

Metatags exists for: Document type und Document type name.


Document type name:

Standard settings	Document type settings (German)
Metatag Settings	Active: <input checked="" type="checkbox"/>
Document type settings	Document type name: rental contract
Document type name	Document type description: Document type for lease
	Position in naming convention: 1
	Meta tags: contract type x

Contract date:

Allgemeine Einstellungen	Metatag Einstellung (Deutsch)
Metatag Einstellungen	Aktiv: <input checked="" type="checkbox"/>
Vertragstyp	Name des Metatags: Vertragsdatum
Vertragsdatum	Beschreibung des Metatags: Datum des Vertragsabschlusses
	Position bei Namenskonvention: 4
	Pflichtfeld: <input checked="" type="checkbox"/>
	Feldart des Metatags: Datumsfeld

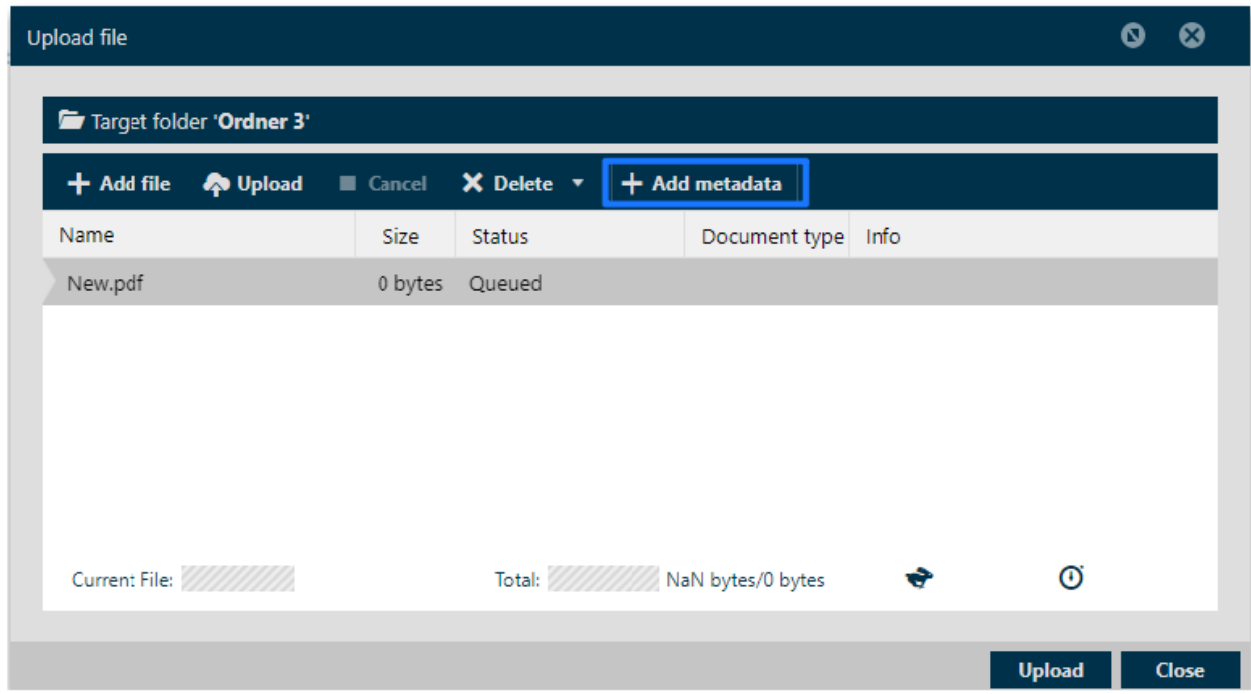
And following document types:

Standard settings	Document type settings (German)
Metatag Settings	
<b>Document type settings</b>	
 Document type name	
	Active: <input checked="" type="checkbox"/>
	Document type name: rental contract
	Document type description: Document type for lease
	Position in naming convention: 1
	Meta tags: contract type x

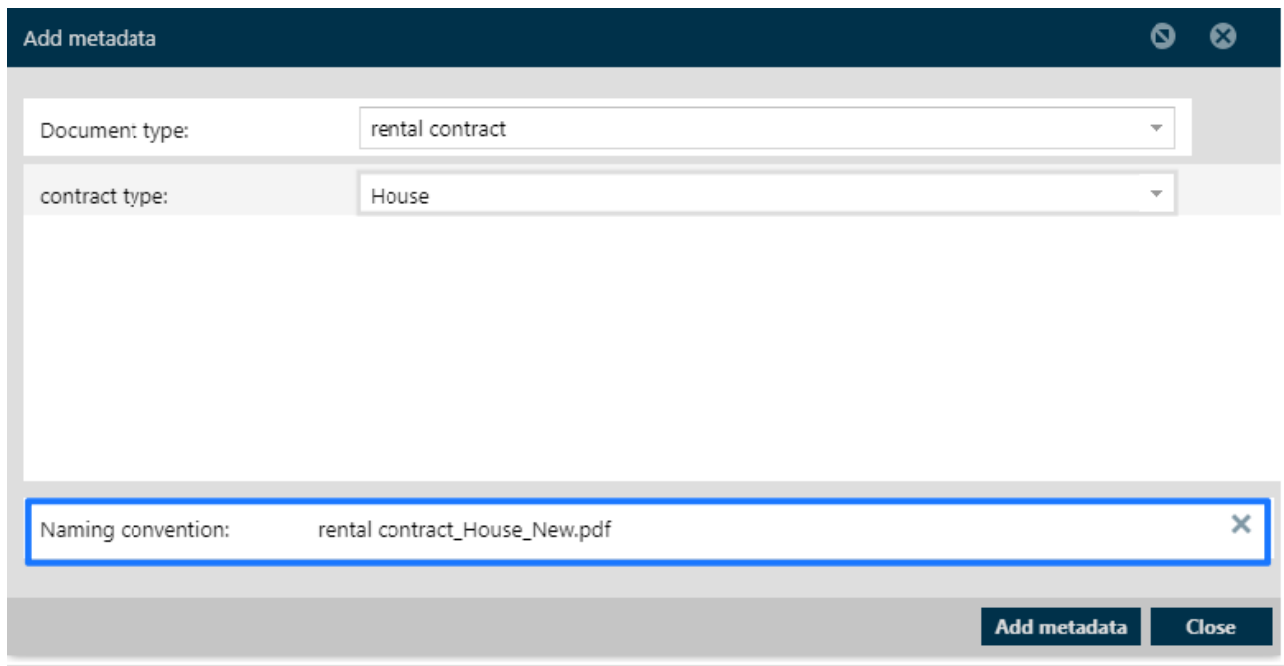
Read more under [Administration](#) → [Metatag Settings](#) und [Administration](#) → Document type settings.

## 6.1 Add while uploading

If you upload a file, you can add metadata to uploading the file.

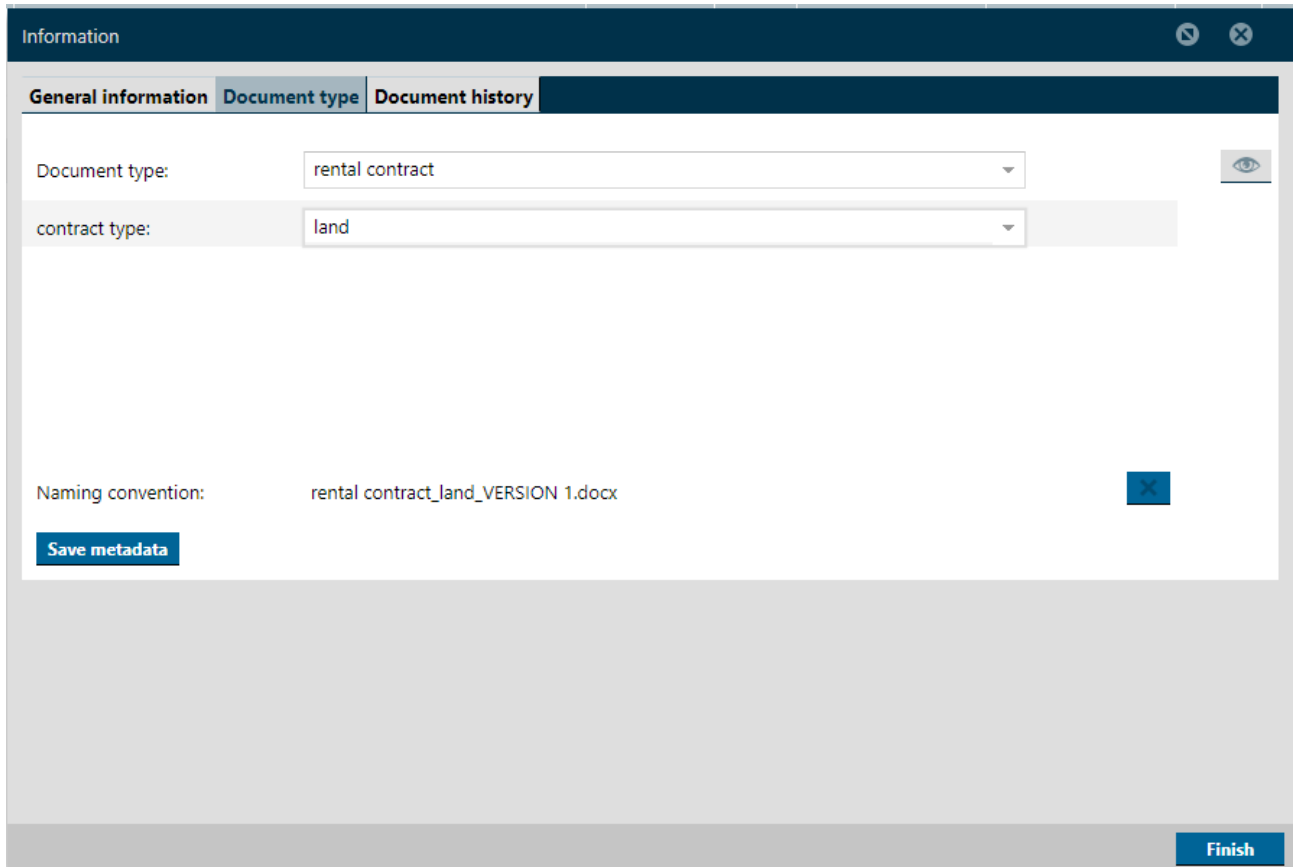


A window pops up, where you can choose the document type as well as meta tags.



## 6.2 Add after uploading

Select the required file and click “Information” in the action strip. You can select the document type and metadata.



Information

General information Document type Document history

Document type: rental contract

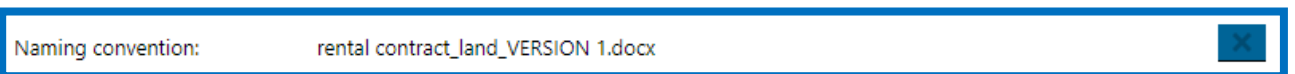
contract type: land

Naming convention: rental contract\_land\_VERSION 1.docx

Save metadata

Finish

„Naming convention“ shows, who the file name is adapted. If you do not need the adaptation, click the cross.

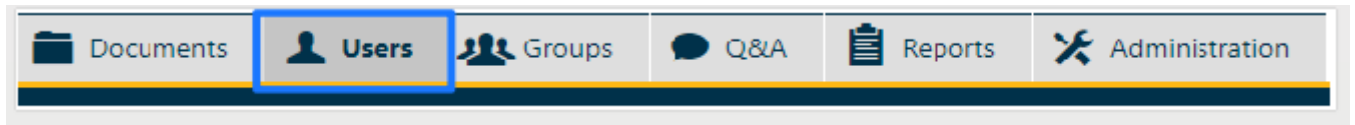


Naming convention: rental contract\_land\_VERSION 1.docx

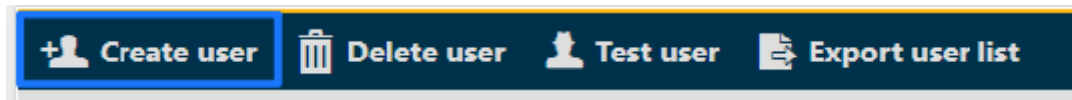


## 7 User

To get to user administration click on the tab „Users“



### 7.1 Create user



To create a new user click in the action strip „Create user“.

You can now create the user.

Last Name:

First name:

Email address:

If you have the module "Authentication", you can set the "Authentication type". You can also add the mobile number of the user.

Verification type:

Mobile number:

More Informations about Authentication under: Administration, General Settings→  
[Authentication](#).

Enter the login name and password for the user. We recommend to generate a password automatically.

Login name:

max

Password:

min. 8 characters

**generate**

Re-enter password:

**Show password**

☒ Send email with account data to the user

☒ Active

Active since:

yyyy-mm-dd hh:mm

Active until:

yyyy-mm-dd hh:mm

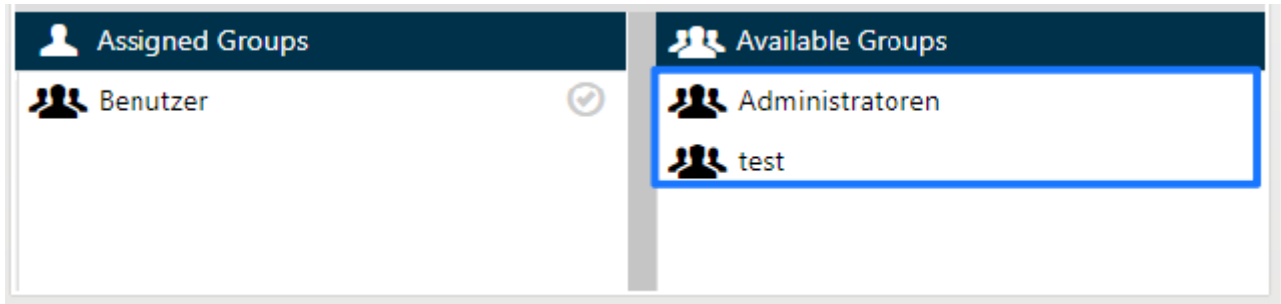
Language:

German

☐ Q&A email notification

To activate the user, click in the checkbox "Active". You can set the period of time for the activity of the user. Also select the language for the user.

You can add groups to the user on the right hand side of the user data input field.



The screenshot shows a user data input field with two panels. The left panel, titled 'Assigned Groups', contains one entry: 'Benutzer' with a group icon and a checkmark. The right panel, titled 'Available Groups', contains two entries: 'Administratoren' and 'test', both with group icons. A blue rectangular box highlights the 'Available Groups' panel.

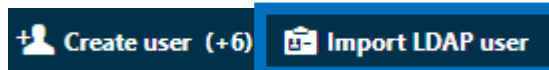
To assign a group drag it into the assigned groups field or double click it.

*Hint:* A user without a group has no right at all for the data room. Only with a least one assigned group an user is able to log in.

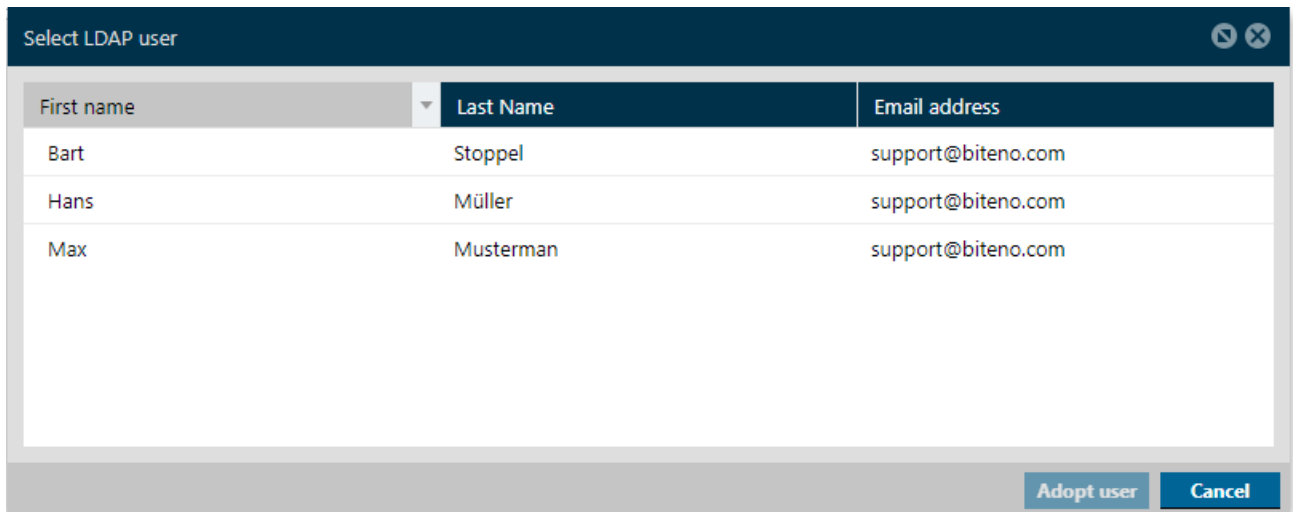
## 7.2 Import LDAP user

To import users via LDAP, you must have configured LDAP correctly and completely in the administration area.

To import users, click Import LDAP Users in the toolbar.







A window will open with a list of all users you can import.



Select a user from the list and click on "Adopt user".

Afterwards the user creation window opens, only with the difference that the data of the user are already taken over. You only have to assign him to a group, activate him and check the access data to be sent by e-mail.

If a user was created via LDAP, it will be displayed with a different status icon than conventionally created users.

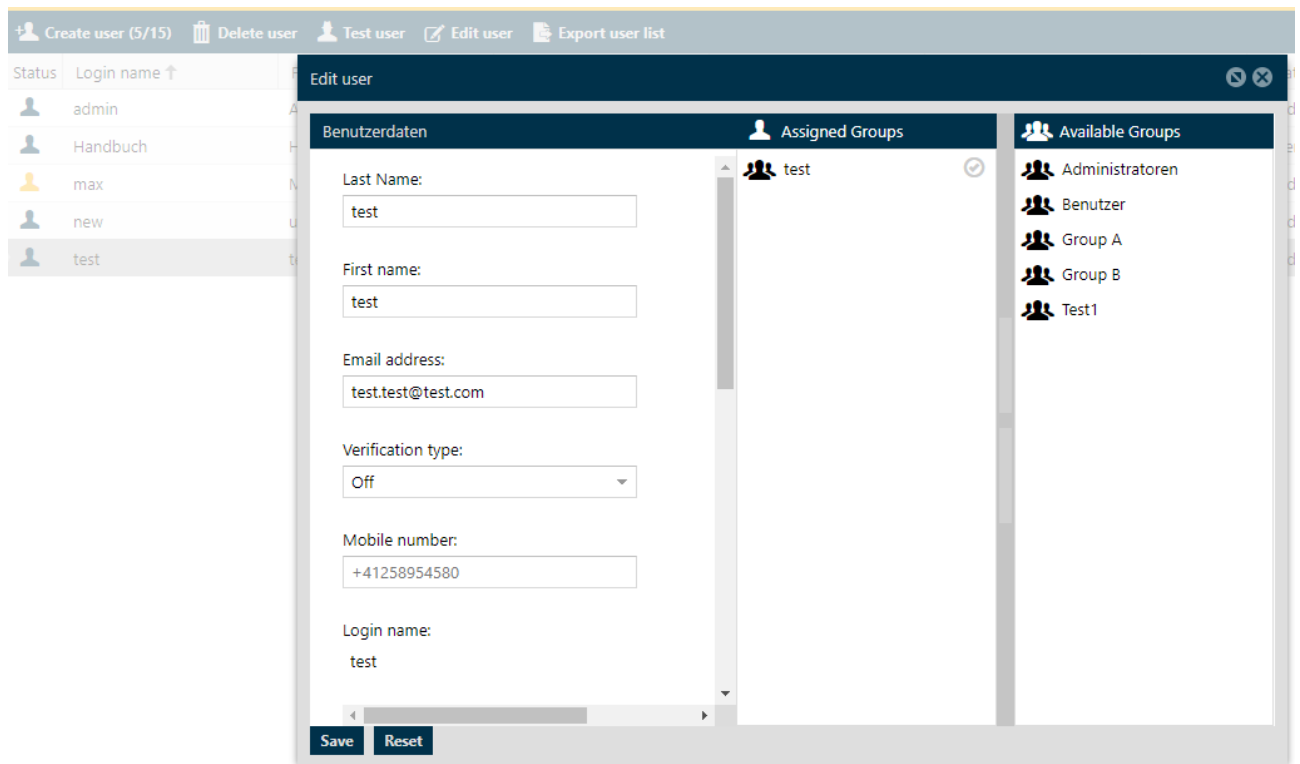
Status	Login name ↑	First name	Last Name	Email address
	admin	Admin	Admin	admin.admin@admin.com
	Handbuch	Handbuch	Handbuch	test@user.com
	max	Max	Mustermann	max@mustermann.com
	max.musterman	Max	Musterman	support@biteno.com

### 7.3 Edit user

To edit a user, click on the user in the user list and select "Edit user" in the toolbar.

Alternatively, you can double click on the user.

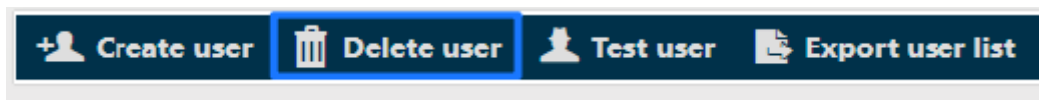
You can change any previously set configuration of the user.



**Note:** When you edit a user, it remains the same user. Only the data will be changed, for example, if you change the login name or last name. You can also enable and disable Q&A email notification for the user.

**Hint:** Due to security reasons, users of the group „administrators“ can only be deleted if the users are also in the group „administrators“.

## 7.4 Delete user

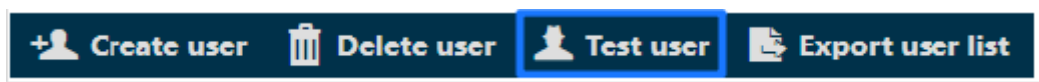


To delete a user, select the user and click „Delete user“.

A window to confirm the deletion will be pop up.

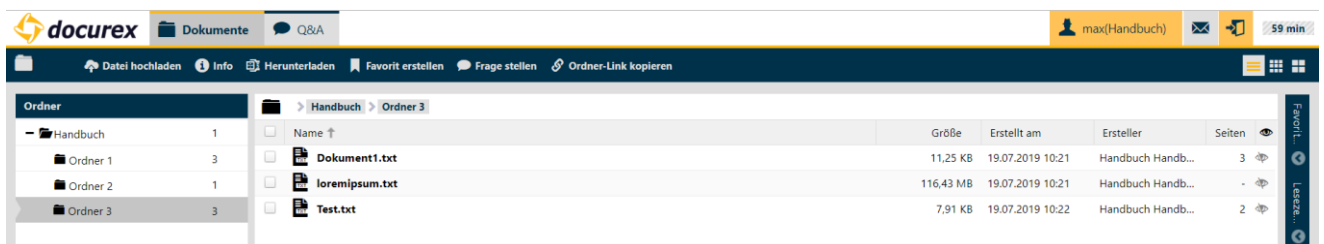
## 7.5 Test user

This action is only available for administrators.



To test a user, select the required user and click „Test user“.

The dataroom will be loaded new and the Administrator „slips“ in the role of the selected user. So you can check the permissions of the user.

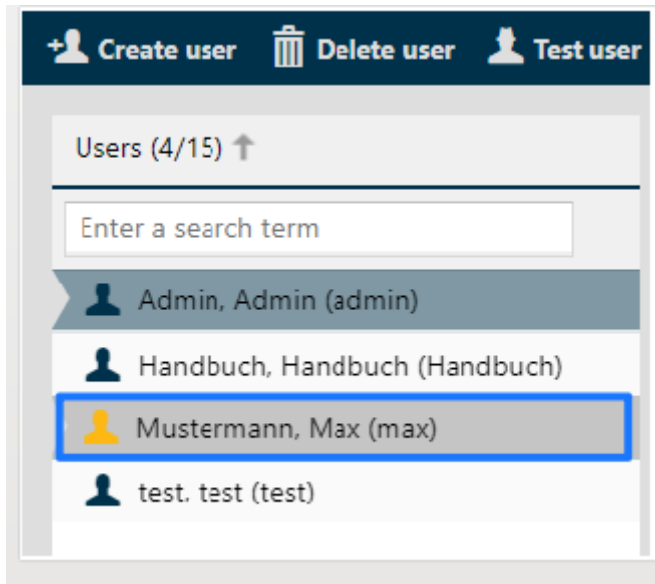


In this test scenario the group „Test“ of the user „max.mustermann“ only has the permission for the „document view“. The group is allowed to upload documents for the selected file.






## 7.6 Unlock users

If a user entered the wrong login credentials several times, the user will automatically be locked. The locked users icon is marked with a different color.



To unlock a user, select the locked user and click "Unlock user" in the action strip. The user will be unlocked and gets a temporary password as/by e-mail.

<div> <span>+ Create user (5/15)</span> <span>Delete user</span> <span>Test user</span> <span>Unlock user</span> <span>Edit user</span> </div>				
Status	Login name	First name	Last Name	Email address ↑
	admin	Admin	Admin	admin.admin@admin.com
	max	Max	Mustermann	max@mustermann.com
	test	test	test	test.test@test.com

## 7.7 Export user list



You can download the displayed user list as an excel-file. Click "Export user list" in the action strip.

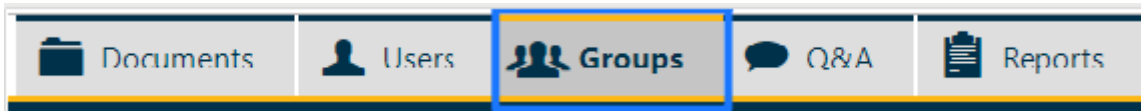
The excel shows following columns:

- First name
- Last name
- Login Name
- E-Mail-address
- Mobile number
- Active
- Active since
- Active until
- Language
- Created on
- Created from
- Group name










## 8 GROUPS

To get to groups administration, click into the tab „Groups“.



### 8.1 Predefined groups for Q&A2

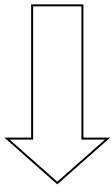
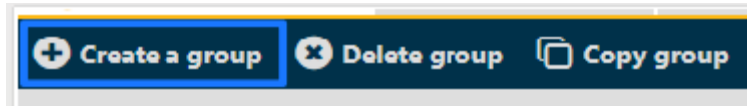
If you have the QA2 module, you have 5 predefined default groups configured and integrated in the workflow templates.

Status	Groups	Created on: ↑	Description	Number of Users	Maximum file size for upload
	Administratoren	2022-05-31 16:01	Administratoren mit vollem Zugriff und speziellen exklusiven Rechten	2	500.00 MB
	Benutzer	2022-05-31 16:01	Normale Benutzer ohne Verwaltungs- und Reportrechten	1	500.00 MB
	Admin	2022-10-10 08:17	Administratoren	1	0 bytes
	Answer question	2022-10-10 08:17	Diese Gruppe kann Fragen beantworten	0	0 bytes
	Ask question	2022-10-10 08:17	Dies Gruppe kann Fragen stellen	0	0 bytes
	Verifier	2022-10-10 08:17	der prüft antworten	0	0 bytes
	Distributor	2022-10-10 08:17	der verteilt fragen	0	0 bytes

In addition to the administrators and users group, you also have the groups "Admin", "Answer questions", "Ask questions", "Verifier" and "Distributor". The configuration of these groups cannot be edited. You can only change the name, their description and the assigned users.

## 8.2 Create groups

To create a new group click on the action strip „Create a group“.



Group name:

Description:

☒ Active

Maximum file size for upload



MB

Filter query for the LDAP group/node

**Test connection**

Enter the group name and description.

Select the checkbox „active“, to activate the group. You can choose the max. file size for the Upload.

If you have the LDAP module, you can also store and test the filter query for the LDAP group/node here.

Now you can see in detail which permissions the group should get.

*Hint:* Take your time to watch the list:

---

Rights allocation [Collapse all](#)

---

☐ Documents ⌵

- ☐ View
- ☐ Search

---

☐ Recycle Bin ⌵

- ☐ View recycle bin
- ☐ Delete from recycle bin
- ☐ Restore from recycle bin

---

☐ User ⌵

- ☐ List
- ☐ View
- ☐ Edit
- ☐ Create
- ☐ Delete
- ☐ Support
- ☐ Support User

---

☐ Group ⌵











- ☐ List
- ☐ View
- ☐ Edit
- ☐ Create
- ☐ Delete

---

☐ Administration ⌵

- ☐ View
- ☐ Edit
- ☐ Create
- ☐ Delete

On the right side in the group settings you can assign in the group the users.

 Assigned User	 Available users
 Mustermann, Max (max)	 Admin, Admin (admin)
 Benutzer, Test (test.user)	 Benutzer, Neu (nBenutzer)
 Musterman, Max (max.musterman)	 Handbuch, Handbuch (Handbuch)
	 new, user (new)
	 test, test (test)

Drag the required user/or alternatively double click in the left field „Assigned user“.

*Hint:* A User without a group assignment has no permissions for the dataroom. The user can just login and only in the own user settings.

## 8.3 Edit groups

To edit a group, click the desired group in the group list.

Then select the "Edit group" option in the toolbar. Alternatively, you can also double-click on the group you want to edit.

<span>+</span> Create a group <span>✖</span> Delete group <span>📄</span> Copy group <span>✎</span> <b>Edit Group</b> <span>📁</span> Folder rights <span>🔒</span> File rights <span>👤</span> group access						
Status	Groups ↑	Created on:	Description	Number of Users	Maximum file size for upload	
	Administratoren	2019-03-01 11:55	Administratoren mit vollem Zugriff und speziellen exklusiven Rechten	3	500.00 MB	
	Benutzer	2019-03-01 11:55	Normale Benutzer ohne Verwaltungs- und Reportrechten	3	500.00 MB	
	Group A	2019-08-16 14:40	test group A	1	720.00 MB	
	Group B	2019-08-16 14:40	test group B	0	720.00 MB	

Then a window opens in which you can edit the group. Once you have made all the changes, save them.

Edit group

Group data

Created on:

2019-03-01 11:55:58

Group name\*:

Benutzer

Description:

Normale Benutzer ohne Verwaltungs- i

✓ Active

Maximum file size for upload (MB)

2000

MB

Rights allocation

Expand all

✓ Documents

✓ Recycle Bin

✓ User

Group

Assigned User

Mustermann, Max (max)
 Benutzer, Test (test.user)
 Musterman, Max (max.musterman)

Available users

Admin, Admin (admin)
 Benutzer, Neu (nBenutzer)
 Handbuch, Handbuch (Handbuch)
 new, user (new)
 test, test (test)

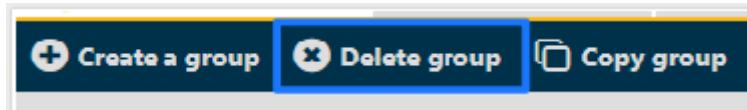
Save

Reset

Abort

For security reasons, you cannot remove permissions from the Administrators group. This group can also be edited only by users who belong to this group.

## 8.4 Delete groups

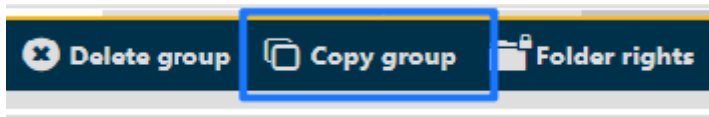


To delete a group, select it in the group list and click "Delete group" in the action strip.

To confirm the deletion a window will be pop up.

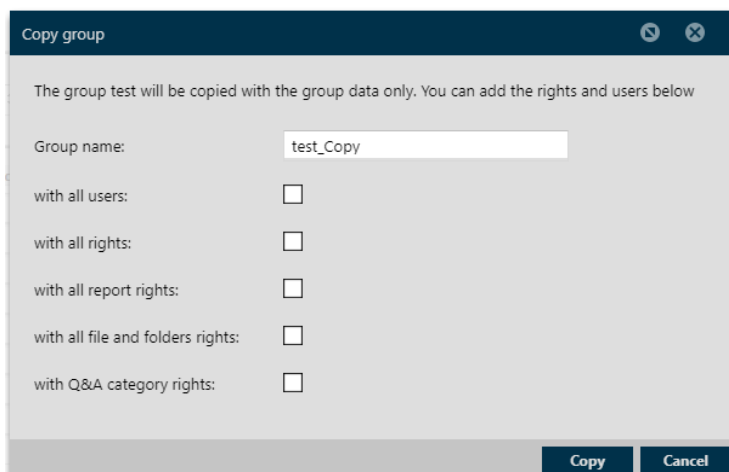
## 8.5 Copy groups

To copy a group, select it in the grouplist and click "Copy group" in the action strip.



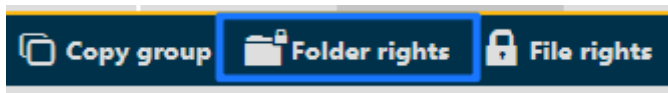
Now you have following possibilities to copy the group:

- with all users
- with all rights
- with all report rights
- with all file and folders rights
- with Q&A category rights

A screenshot of a 'Copy group' dialog box. The title bar says 'Copy group'. The main text reads: 'The group test will be copied with the group data only. You can add the rights and users below'. There is a text input field for 'Group name:' containing 'test\_Copy'. Below this are five checkboxes, each with a label: 'with all users:', 'with all rights:', 'with all report rights:', 'with all file and folders rights:', and 'with Q&A category rights:'. All checkboxes are currently unchecked. At the bottom right are two buttons: 'Copy' and 'Cancel'.

## 8.6 Edit Folder rights

Edit folder permissions To edit folder permissions click in tab menu bar into „Folder rights“.



Folder and (default) file rights of group "test"

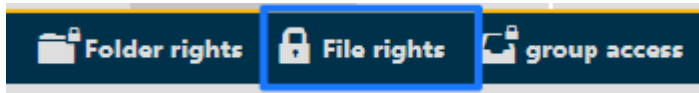
Ordner												
- Handbuch	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordner 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordner 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordner 3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save Cancel

## 8.7 Edit File rights

To edit file permissions click in tab menu bar into „File rights“.

You can edit the permissions for all files in a group.



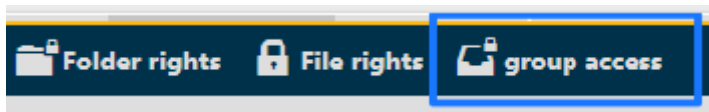
Default file rights of group "test"

Ordner																
Handbuch	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordner 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordner 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ordner 3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Save
Cancel

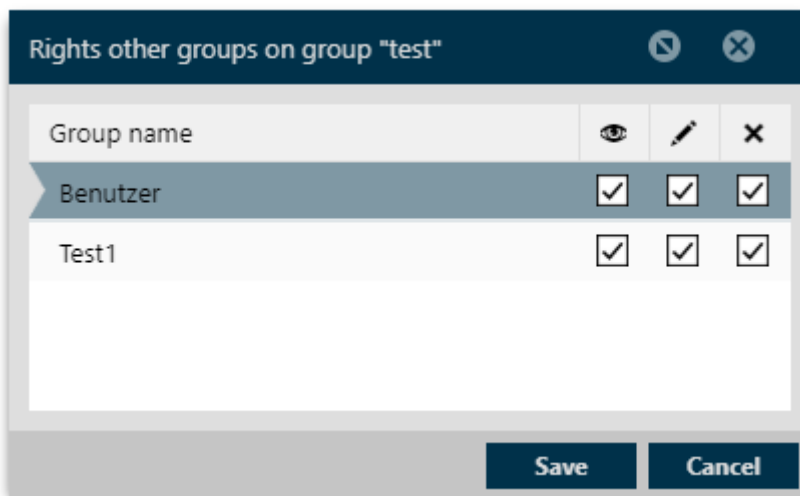


## 8.8 Groups access



To get a group access for groups, click „group access“ in the tab.

You can set, which other group can watch the marked group or delete it.



## 9 Q&A

With the „Q&A“ module user are able to ask questions about files and folders. You can organize them into categories and define to which folder, and therefore files, groups are allowed to ask questions about.

Our Examples:

„Group A“ and „Group B“, with following permissions:

Edit group

Group name:

Description:

☒ Active

Maximum file size for upload  
 720 MB

Rights allocation Collapse all

☒ Documents

☒ View
☒ Search

☐ Recycle Bin

☐ User

☐ Group

☐ Administration

☒ Q&A

☒ View questions
☒ Create question
☐ Approve
☐ Create answer

☐ Permissions

☐ Docusync

☐ Reports

Edit group

Group name:

Description:

☒ Active

Maximum file size for upload  
 720 MB

Rights allocation Collapse all

☒ Documents

☒ View
☒ Search

☐ Recycle Bin

☐ User

☐ Group

☐ Administration

☒ Q&A

☒ View questions
☒ Create question
☐ Approve
☐ Create answer

☐ Permissions

☐ Docusync

☐ Reports

Our Examples:

Category „Leases, „Purchase agreements“, „Lease agreements“.

To create categories: under Administration → Q&A Settings.

Leases:

Q&A Administration

Active:

☐

Name:

Leases

Description:

Category for leases

Approval is required:

☒

Category for this folders (extends to all subfolders, if not expanded)

Handbuch

☐

Ordner 1

☐

Ordner 2

☒

Ordner 3

☒

Edit rights of category per group

Group ↑				
Administratoren	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Benutzer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Group A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Group B	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

## Purchase agreements:

Q&A Administration

Active:

☒

Name:

Purchase agreements

Description:

Category for purchase contracts

Approval is required:

☒

Category for this folders (extends to all subfolders, if not expanded)

Handbuch

☐

Ordner 1

☒

Ordner 2

☒

Ordner 3

☒

Edit rights of category per group

Group ↑				
Administratoren	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Benutzer	<input type="checkbox"/>	<input type="checkbox"/>		
Group A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Group B	<input type="checkbox"/>	<input type="checkbox"/>		

## Lease agreement:

Q&A Administration

Active:

☒

Name:

lease agreement

Description:

Category for lease contracts

Approval is required:

☒

Category for this folders (extends to all subfolders, if not expanded)

- Handbuch

☐

Ordner 1

☐

Ordner 2

☒

Ordner 3

☐

Edit rights of category per group

Group ↑				
Administratoren	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Benutzer	<input type="checkbox"/>	<input type="checkbox"/>		
Group A	<input type="checkbox"/>	<input type="checkbox"/>		
Group B	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		

Explanation:

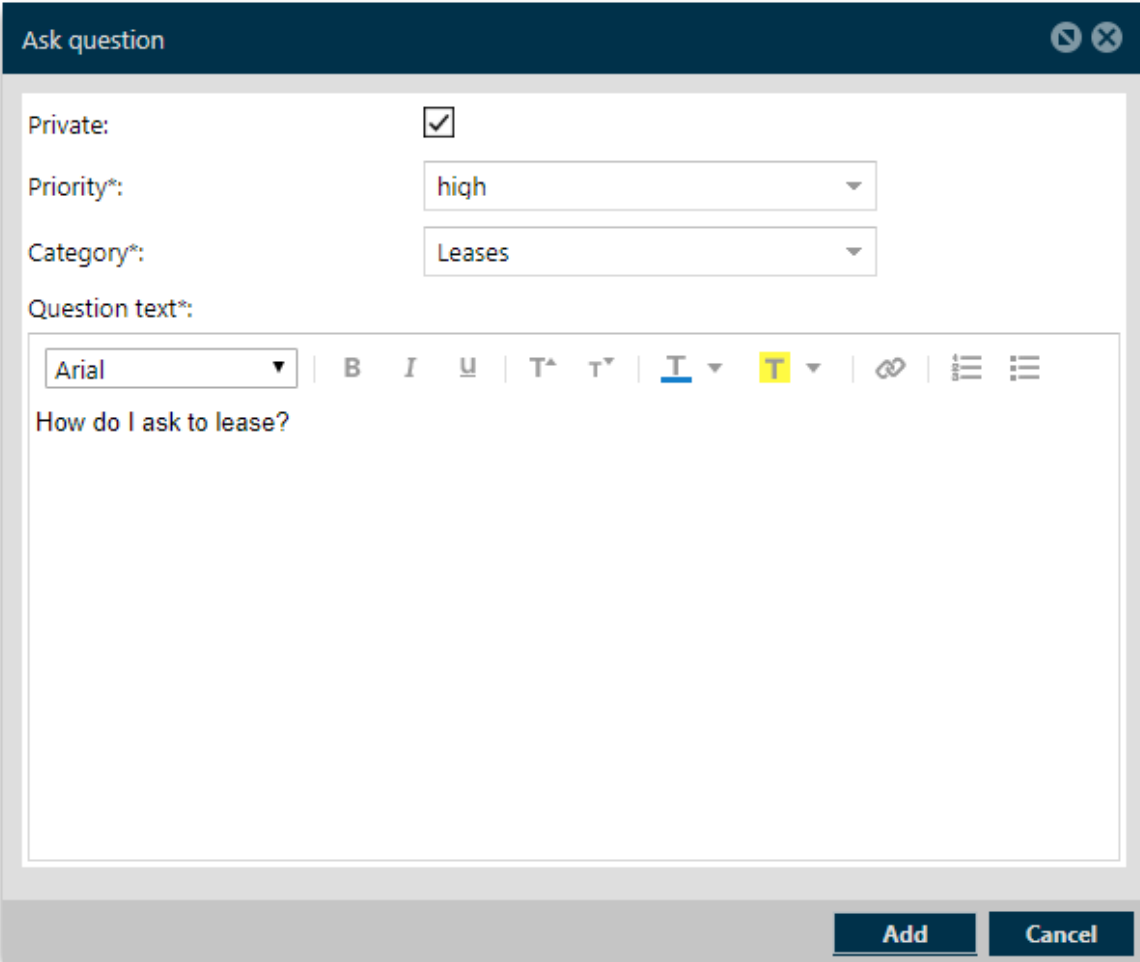
- Group A works with leases and purchase agreements, therefore assigned to category „Lease agreement“ and „Purchase agreement“.
- Group B works with leases- and purchase agreements, therefore assigned in the category „Leases“ and „Leases agreements“.
- User of the group „Administrators“ have all permissions, e.g.. are allowed to release questions and answers.
- Leases are in Stuttgart and Nürnberg, and therefore are not assigned in the folder „1-Köln“.
- Purchase agreements are in all three locations, therefore the category is assigned in the folder „1-Köln“, „2-Nürnberg“ und „3-Stuttgart“.
- Lease agreements are in Nürnberg, therefore is the category just assigned to the folder „3-Stuttgart“.

A user in the Group A can ask a question to the folder „3-Stuttgart“ with the category „Leases“, but no question in the category „Purchase agreements“.

Users of the Group A only ask a question, User of the Group B cannot watch the question.

## 9.1 Ask question

You may change the visibility of a question in the window „Ask question“. In case you don't want other groups members to see your question, then select „private question“. You can also set the priority and add it to a category.



Ask question

Private: ☒

Priority\*: high

Category\*: Leases

Question text\*:

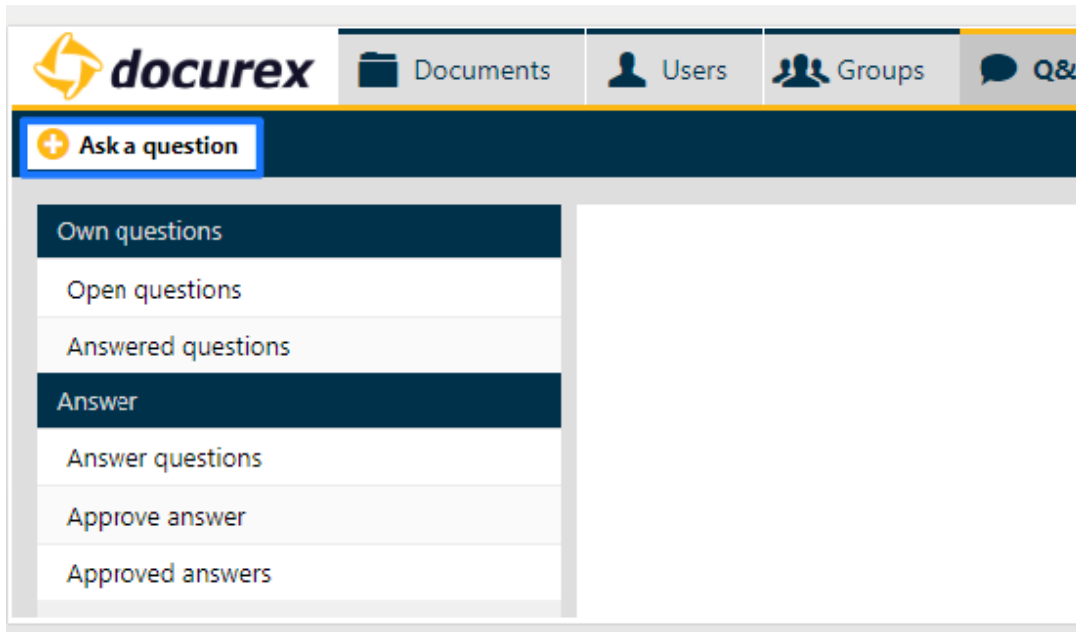
Arial | B I U | T<sup>+</sup> T<sup>-</sup> | T | T | | | |

How do I ask to lease?

Add Cancel

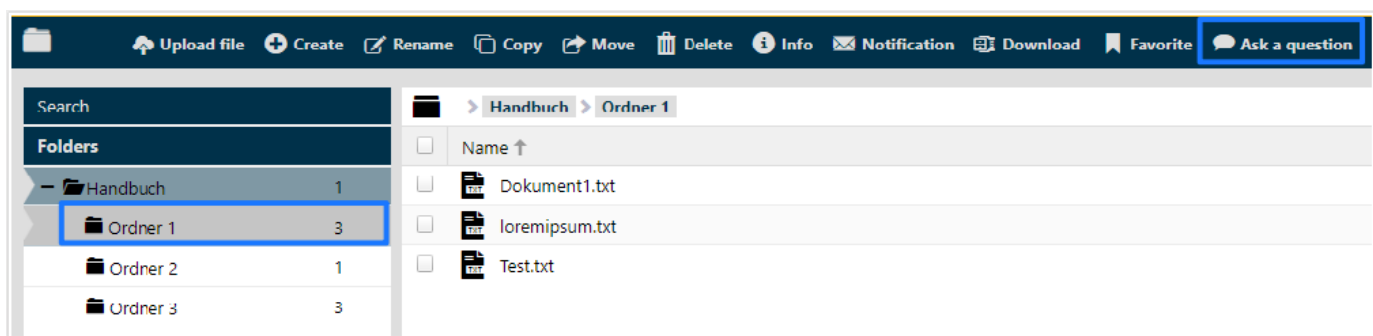
### 9.1.1 General questions

To ask a question, click in the menu bar in the tab „Q&A” and click “Answer”.



### 9.1.2 Folder questions

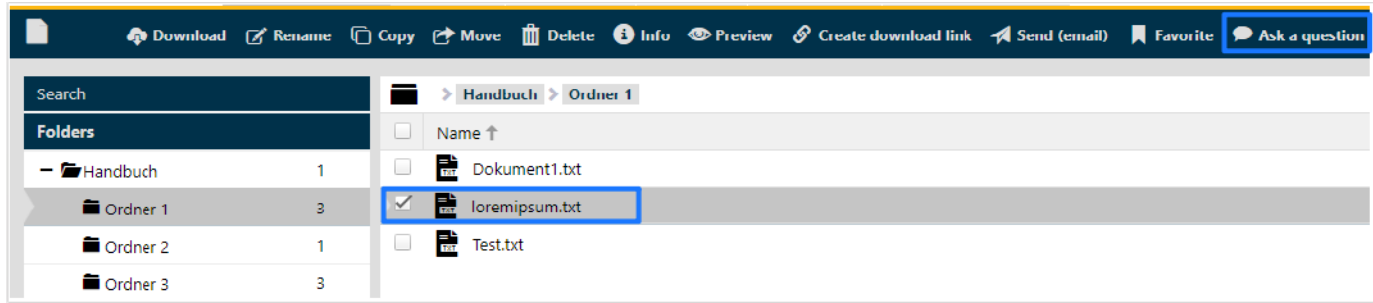
To ask a question concerning a folder, click in the menu on the tab „Documents” and choose the required folder. Click in the action strip “Ask a question.”





### 9.1.3 File questions

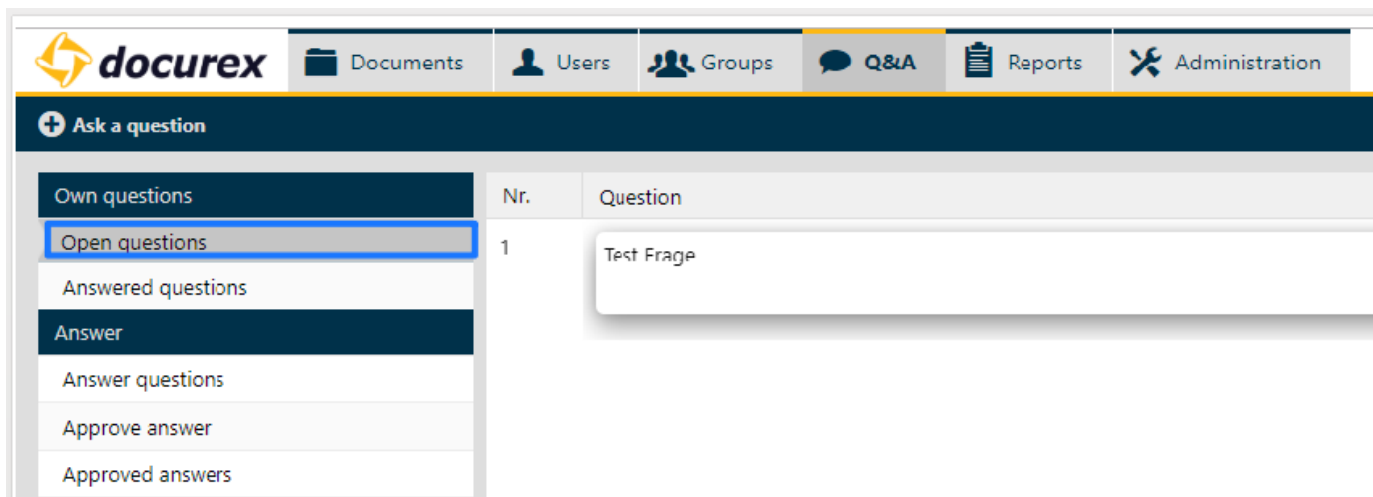
To ask a question about a file, click in the tab „Documents“ and click on the action strip „Ask a question“.



## 9.2 View questions

### 9.2.1 Open questions

To watch open questions, click in the menu bar on the tab „Q&A“, click on „Open questions“.



You can also edit your own questions and leave a comment.

<a href="#">+ Ask a question</a> <a href="#">✎ Edit question</a> <a href="#">☰ Create comment</a>		
Own questions	Number	Question
Open questions	10	Neue Frage 2
Answered questions		

To leave a comment, select the corresponding question and click on "Comment".  
on "Comment". A window will open where you can leave your comment.

Create comment

Question

Neue Frage 2

Comments

Comment on this question

Comment visible by:

all

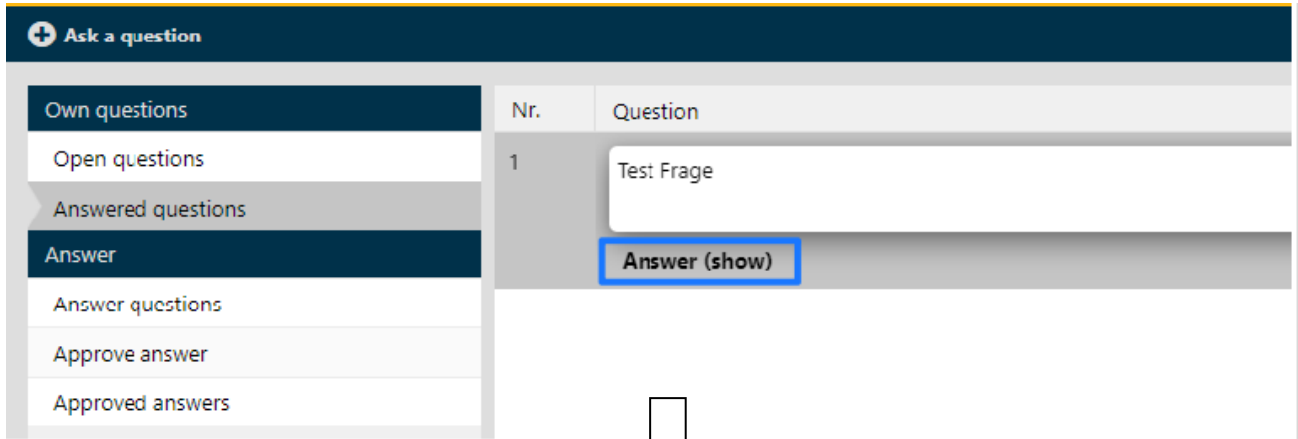
! This field cannot be empty

Add

Cancel

## 9.2.2 Answer questions

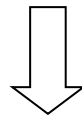
To view „answered questions“ select the tab „Q&A“ and select „answered questions“. You will see all publish/releases questions of your group.



**Ask a question**

	Nr.	Question
Own questions	1	Test Frage

**Answer** **Answer (show)**



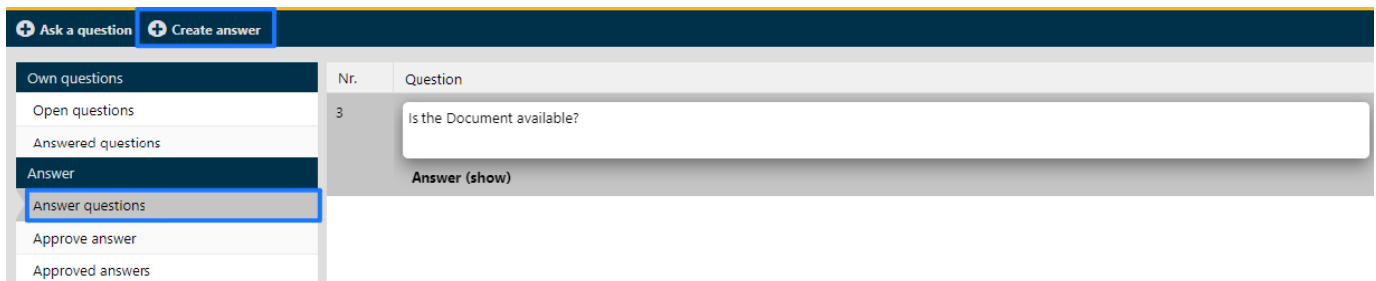

**Ask a question**

	Nr.	Question
Own questions	1	Test Frage

**Answer** **Answer (hide)**

Test Antwort

*Hint:* Questions, which answers were declined, can be answered once again.



**Ask a question** **Create answer**

	Nr.	Question
Own questions	3	Is the Document available?

**Answer** **Answer (show)**

A window pops-up. You can enter your answer there.

Create answer

Question

Is the Document available?

Answer from Handbuch Handbuch, 2019-08-16 15:05:18




Not Sure

Refuse by Handbuch Handbuch, 2019-08-16 15:05:55

not correct

My answer

Arial

**B** *I* U T<sup>^</sup> T<sup>v</sup> T **T**   

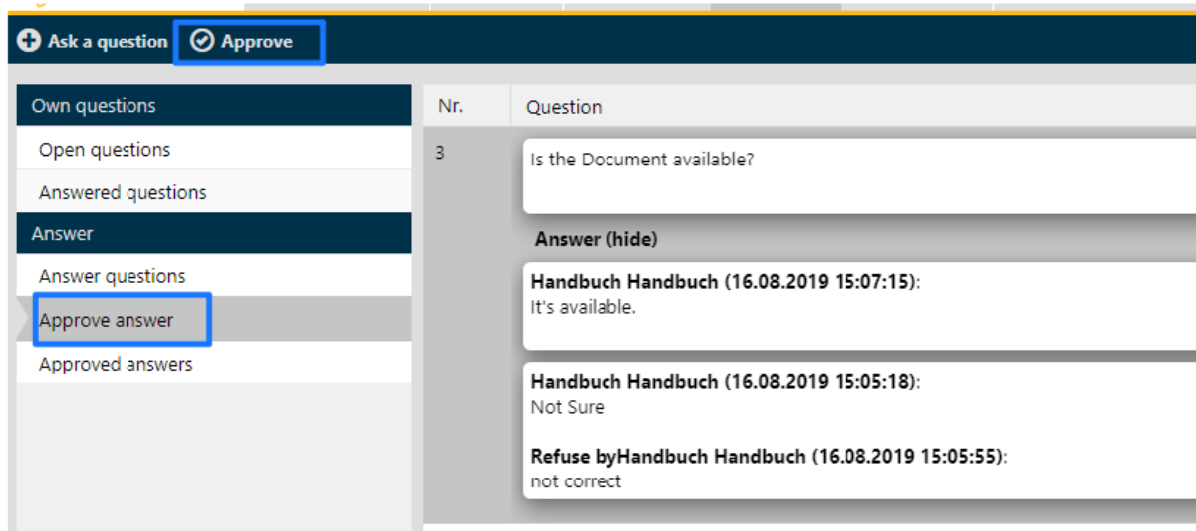
It's available.

Add

Cancel

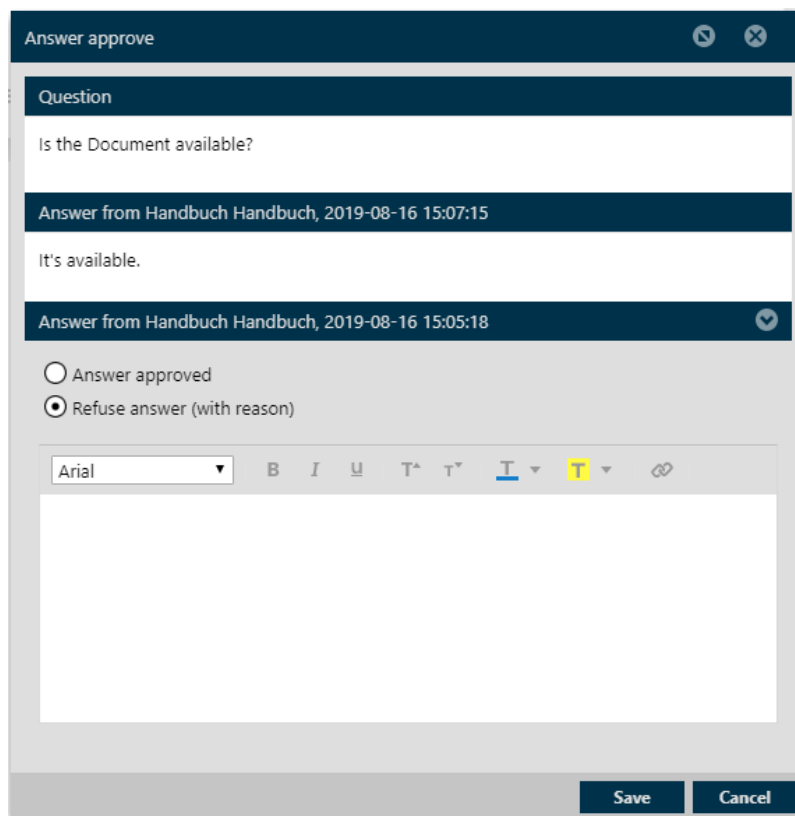
## 9.4 Publish answer

To publish an answer, select in the menu tab "Q&A" and click „Approve answer“. All answered questions will be displayed, which you can release. Select the answer you want to release and click in the action strip "Approve".



A window will be pop up, where a can approve or refuse the answers.

If you refuse an answer, you have to specify the reason for.



## 10 Q&A 2.0

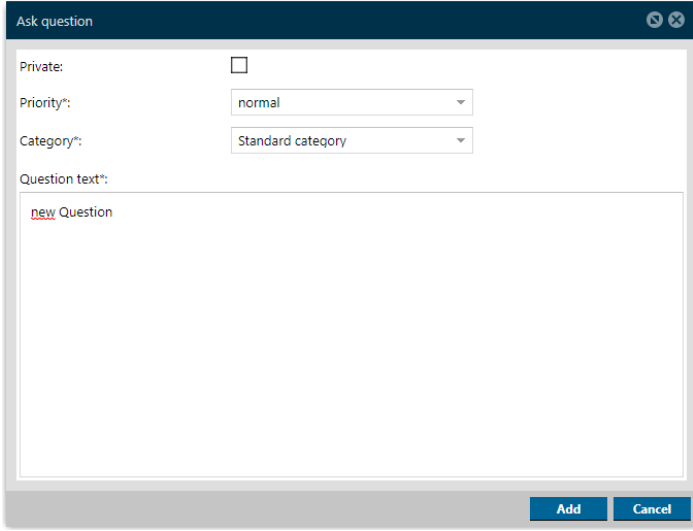
The Q&A 2.0 area is located in the same place as the normal Q&A.

How to configure a workflow that will be applied to this area you can see under [Q&A Workflows](#) in the administration area.

### 10.1 Ask questions and distribute

You can limit the visibility of the question in the "Ask question" window. If you want e.g., that other group members cannot see the question, then select the Private question" checkbox.

You can also specify a priority and select the category.

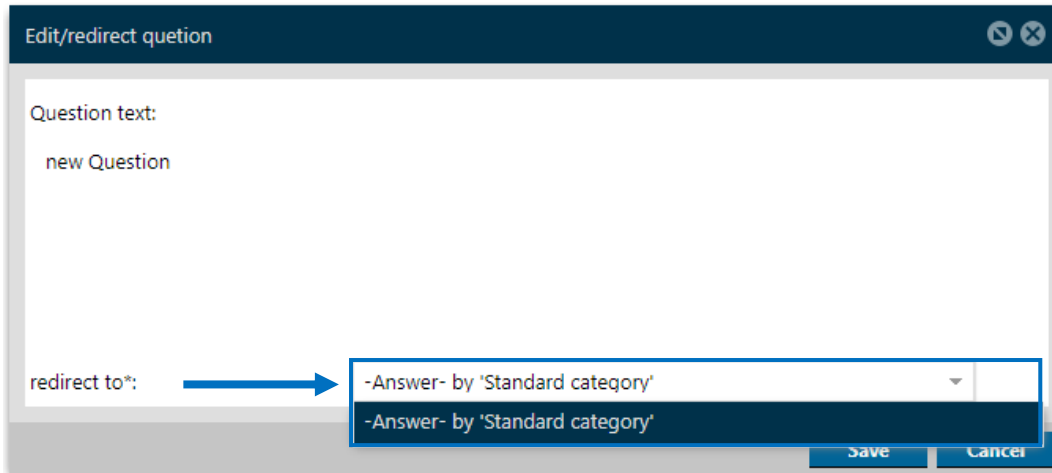


When you have asked a question, it automatically lands in the next state defined in the workflow. In this case now in the distribution phase.

Own questions	Number	Question
Open questions	1	new Question
Answered questions		
<b>Answer</b>		
Answer		
Finalized		
<b>Distributor</b>		
Reviewer		

Here you can then edit, forward or create a comment to the question depending on the previously set permissions.

If you forward the question, you will get a selection window in which state you can forward the question. This also depends on how you have configured your workflow.



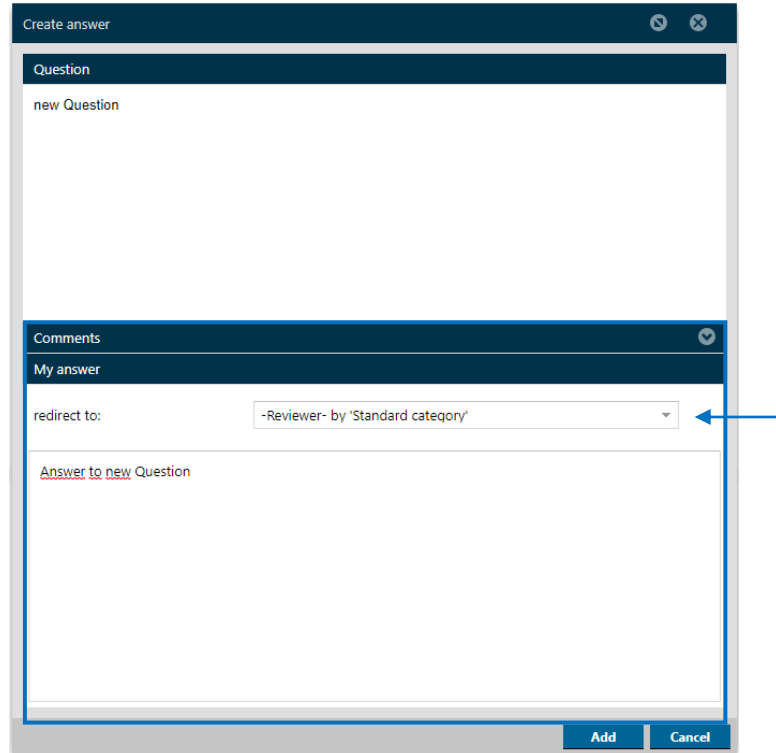
## 10.2 Answer and check question

If the question is forwarded from the distribution to the answering phase, it will appear under the the "Answer" item.

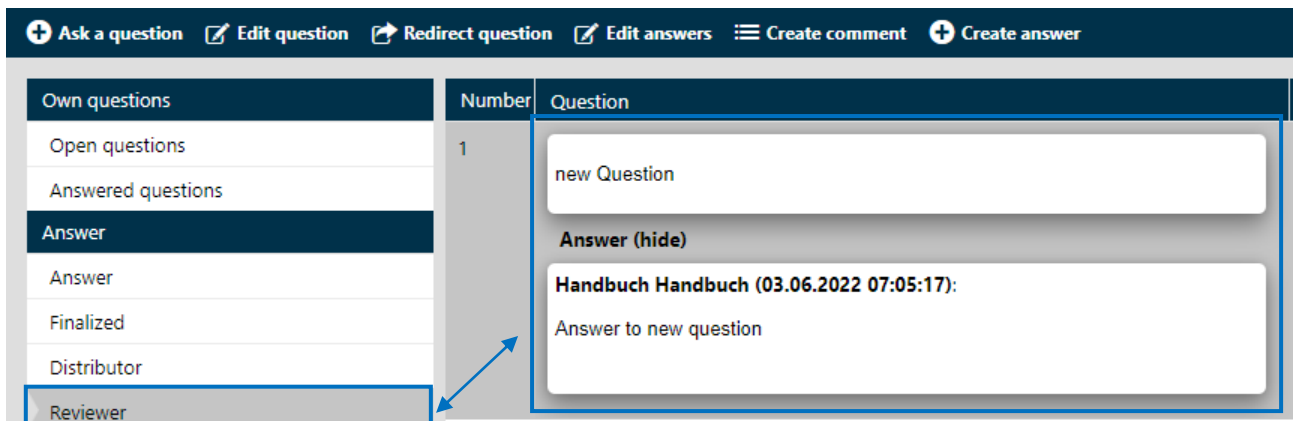
<a href="#">+ Ask a question</a> <a href="#">Edit question</a> <a href="#">Redirect question</a> <a href="#">Edit answers</a> <a href="#">Create comment</a> <a href="#">+ Create answer</a>		
Own questions	Number	Question
Open questions	1	<div>new Question</div>
Answered questions		
<b>Answer</b>		
Answer		
Finalized		
Distributor		
Reviewer		

Here, depending on the set permissions, there is the possibility to edit the question, forward the question, create an answer, edit an answer or add a comment.

When you create an answer, you can also move the question to the next possible state in the same step.



The question with the corresponding answer now lands in the previously selected state. In this case, in the "Reviewer" phase.



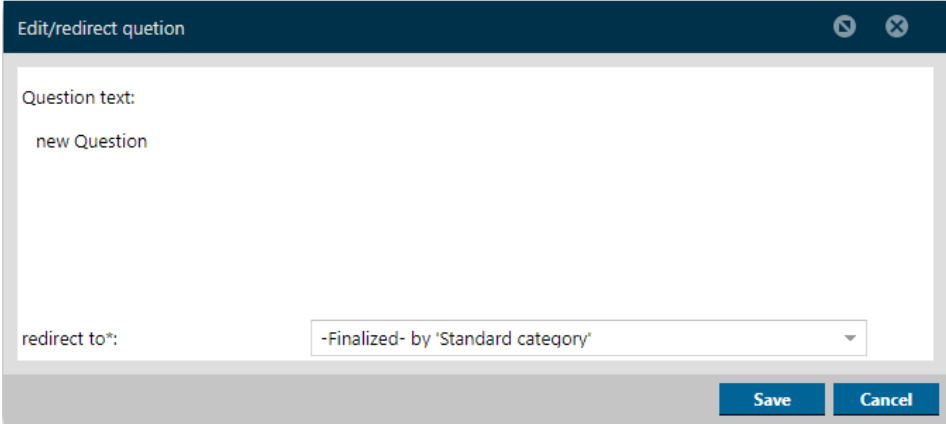
Own questions	Number	Question
Open questions	1	new Question
Answered questions		
<b>Answer</b>		
Answer		<b>Answer (hide)</b>
Finalized		<b>Handbuch Handbuch (03.06.2022 07:05:17):</b>
Distributor		Answer to new question
<b>Reviewer</b>		



Depending on your permissions, you can edit the question, forward it or edit the answer. You can also create a New answer if necessary. The Reviewer phase is meant to check the completeness and correctness of the questions and answers before they are finally closed.

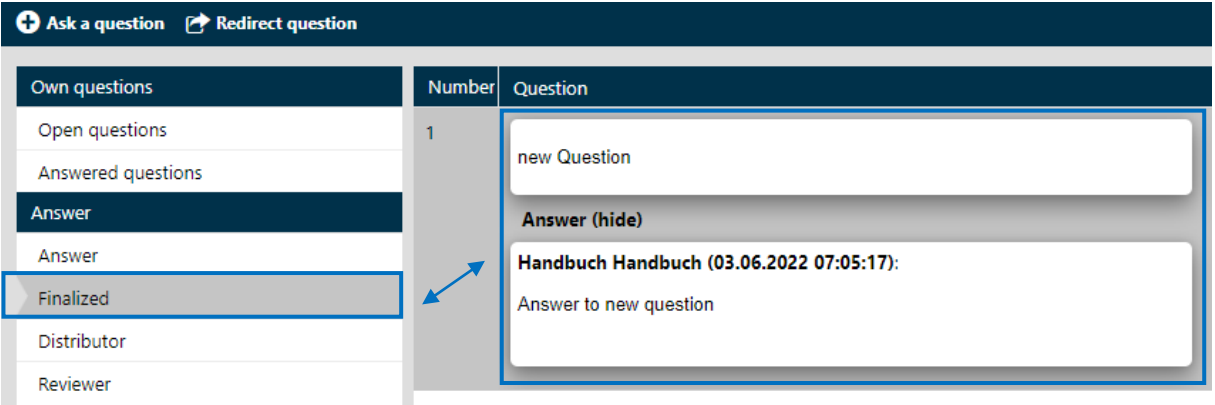
If all the information are correct, the question can be forwarded to the next state. Here it depends on what was previously configured in the active workflow.

In this case into the last phase "Finalized".



### 10.3 Finalized questions

All questions that have been completed end up in this section.



If a transition from Finalized to Reviewer has been configured, the question can be reset from this state back to the previous state, and correct any errors in the answer or the question can be checked again.

## 10.4 Comment questions

You can also create comments on questions if you are authorized.

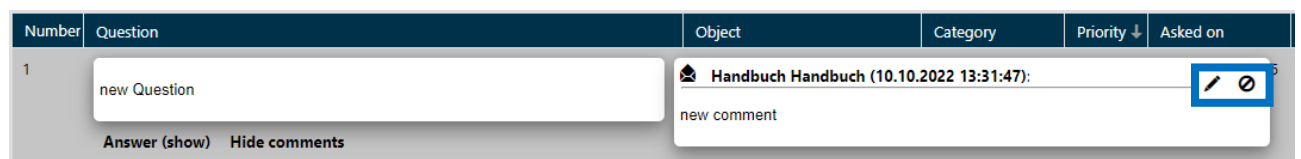
To do this, simply click on the question and select the "Create comment" option in the toolbar.



A window will open where you can leave your comment.

If there is a comment to the question, it will be displayed below the question. Simply click on "Show comments".

The comment will now be displayed next to the question.



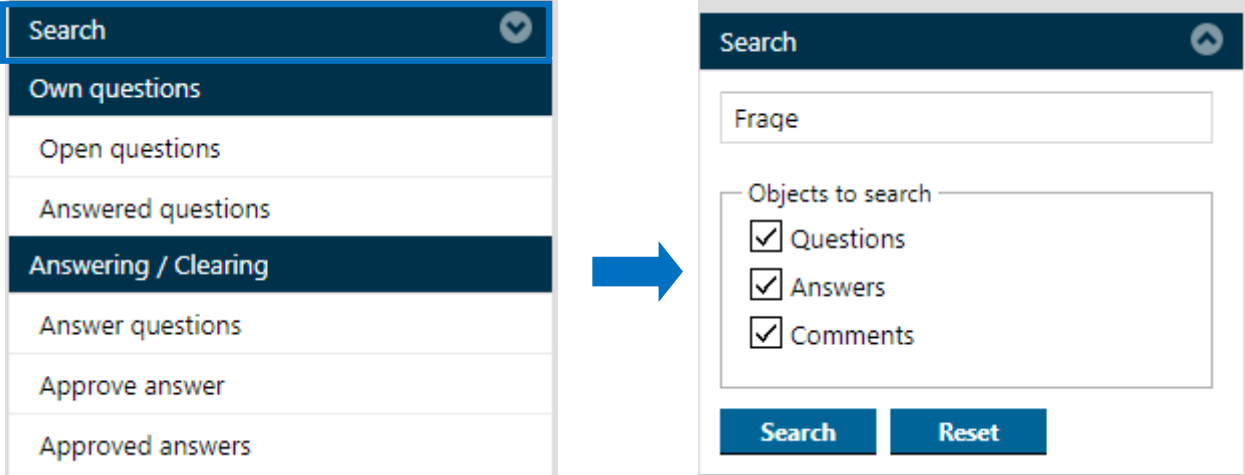
You can also delete comments that you have created yourself. Just click on the delete icon at the end of the comment.

You can also edit your own comments.

Click on the pencil icon at the end of the comment and a window will open where you can edit and save the comment.

## 11 Q&A Search

To use the search, click on the "Search" tab.



The diagram illustrates the search interface. On the left, a sidebar menu shows the 'Search' tab selected. On the right, the search form is shown with the input field containing 'Frage'. Below the input field, the 'Objects to search' section has three checked options: 'Questions', 'Answers', and 'Comments'. At the bottom of the form are 'Search' and 'Reset' buttons.

You can search here in questions, answers or in the comments.

The search result is divided into the areas to be searched. All results who founded are highlighted in colour.

Search	Number	Question	Status	Object	Category	Priority	Asked on	Asked by	Groups of creator
<div>Frage</div> <div>Objects to search</div> <div><input checked="" type="checkbox"/> Questions</div> <div><input checked="" type="checkbox"/> Answers</div> <div><input checked="" type="checkbox"/> Comments</div> <div>Search Reset</div> <div>Own questions</div> <div>Open questions</div> <div>Answered questions</div> <div>Answering / Clearing</div> <div>Answer questions</div> <div>Approve answer</div> <div>Approved answers</div>	= 1 results for "Answer"								
	12	Neue Frage 3	Answered que...		Standard Kateg...	normal	2021-05-14 11:12	Handbuch Handbuch	Administratoren
		Answer (show)							
	= 3 results for "Questions"								
	1	Test Frage	Answered que...		Standard Kateg...	normal	2019-04-18 09:08	Handbuch Handbuch	Administratoren
		Answer (show)							
	8	Neue Frage 1	Open questions		Standard Kateg...	normal	2021-05-14 11:12	Handbuch Handbuch	Administratoren
	10	Neue Frage 2	Open questions		Standard Kateg...	normal	2021-05-14 11:12	Handbuch Handbuch	Administratoren
		Answer (show)							
	= 1 results for "Comments"								
	4	Test Question Frage	Open questions		Standard Kateg...	normal	2021-04-19 11:08	Handbuch Handbuch	Administratoren
		Answer (show) Show comments							

**Tip:** The search is available for both Q&A and Q&A 2.0.

## 12 Reports



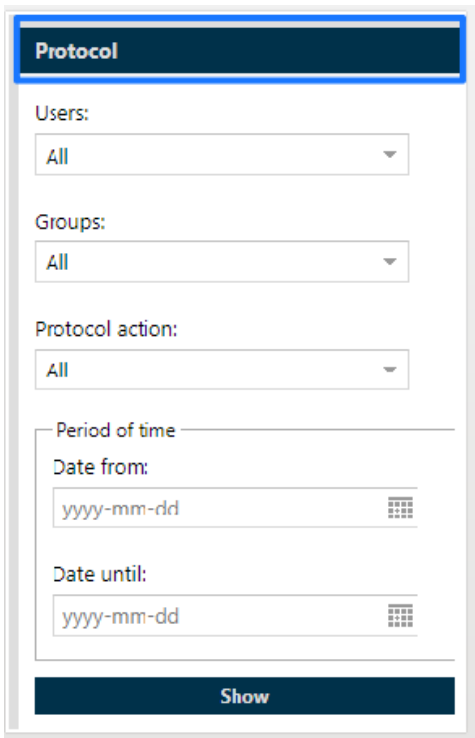
To get to reports, select the menu tab "Reports"

### 12.1 User protocol

To get to the user protocol, click on the tab „Protocol“

The following options are available:

- Users – all or single
- Groups – all or single
- Protocol action – all actions or single (f.ex. download documents)
- Period – from and until



Under „Show“ the protocol will be displayed.

Protocol	Users	Protocol action	Date
Users: All	Handbuch, Handbuch (Handbuch)	Write answer for question "3"	2019-08-16 15:07
Groups: All	Handbuch, Handbuch (Handbuch)	Question "3" rejected	2019-08-16 15:05
Protocol action: All	Handbuch, Handbuch (Handbuch)	Write answer for question "3"	2019-08-16 15:05
Period of time Date from: yyyy-mm-dd	Handbuch, Handbuch (Handbuch)	New question "3" asked in category "Standard Kategorie"	2019-08-16 15:03
Date until: yyyy-mm-dd	Handbuch, Handbuch (Handbuch)	Question "1" approved	2019-08-16 15:01
Show	Handbuch, Handbuch (Handbuch)	Created language in administration setting "qa"	2019-08-16 14:54
	Handbuch, Handbuch (Handbuch)	Created language in administration setting "qa"	2019-08-16 14:47
	Handbuch, Handbuch (Handbuch)	Modified qa in administration settings	2019-08-16 14:45
	Handbuch, Handbuch (Handbuch)	Created language in administration setting "qa"	2019-08-16 14:45
	Handbuch, Handbuch (Handbuch)	User logged in	2019-08-16 14:04
	Handbuch, Handbuch (Handbuch)	User logged out	2019-08-16 14:03
	Handbuch, Handbuch (Handbuch)	User "Max Mustermann" has been modified (Login: max)	2019-08-16 14:03
	Handbuch, Handbuch (Handbuch)	Created language German in administration setting "DOCTYPE"	2019-08-16 13:50
	Handbuch, Handbuch (Handbuch)	Created language German in administration setting "METATAG"	2019-08-16 13:45
	Handbuch, Handbuch (Handbuch)	Page 3 of document "Dokument1.txt" from folder "Handbuch/Ordner 3" viewed in secure preview	2019-08-16 13:33

## 12.2 Disclaimer

To get to the Disclaimer Report, click „Disclaimer“ within the menu.

The following filter options are available:

- Create by –User
- Period of time – from and until
- Results per page

By clicking on "Show", depending on the selected filter options, all confirmed disclaimers are displayed with the name of the user, the version, language and confirmation date.

User	Users	Version	Language	Date
<b>Disclaimer</b>	Handbuch, Handbuch (Handbuch)	2020-06-25 16:32:55	German	2020-06-25 16:33
	Handbuch, Handbuch (Handbuch)	0000-00-00 00:00:00	German	2020-06-25 16:32
	Handbuch, Handbuch (Handbuch)	no version	English	2019-08-16 15:31
	Handbuch, Handbuch (Handbuch)	no version	German	2019-03-01 12:08

Create by

Users:

All

Groups:

All

Period of time

Date from:

yyyy-mm-dd

Date until:

yyyy-mm-dd

Results per page:

1000

Show

## 12.3 Document activity

To get to the document activity, click on the tab "Document activity".

The following filter options are available here:

- Activity from -filter by groups
- Activity period - date from and to

User

Disclaimer

**Document activity**

▲ Document activity of —
 

Groups:
 

All ▼

▲ Time period for document activity —
 

Date from:
 

yyyy-mm-dd

Date until:
 

yyyy-mm-dd

Show

By clicking on "Show", depending on the selected filter options, the document activity will be displayed.

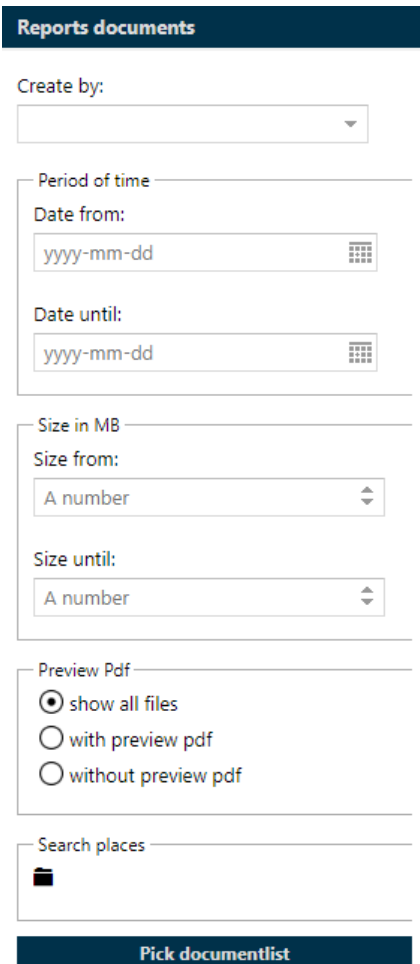
User	Group name	Document activity ove	03.06.2022
Disclaimer	Administratoren	2	2
<b>Document activity</b>			
▲ Document activity of — <div>           Groups:           <div>All ▼</div> </div>			
▲ Time period for document activity — <div>           Date from:           <div>yyyy-mm-dd</div> </div> <div>           Date until:           <div>yyyy-mm-dd</div> </div>			
Show			

## 12.4 Documentlist

To get to the documentlist, click "Reports documents" within the menu.

The following options are available:

- Create by –User
- Period of time – from and until
- Size in MB – Size from and Size until
- Preview PDF - whether a file has a preview or not
- Search locations - select folder in which to search



The screenshot shows a web form titled "Reports documents" in a dark blue header. Below the header, there are several sections for filtering documents:

- Create by:** A dropdown menu.
- Period of time:** Two date input fields labeled "Date from:" and "Date until:", both with a "yyyy-mm-dd" placeholder and a calendar icon.
- Size in MB:** Two numeric input fields labeled "Size from:" and "Size until:", both with a "A number" placeholder and a spinner icon.
- Preview Pdf:** Three radio button options: "show all files" (selected), "with preview pdf", and "without preview pdf".
- Search places:** A folder icon and a text input field.

At the bottom of the form is a dark blue button labeled "Pick documentlist".

With click on "Pick documentlist", the document list will be displayed.



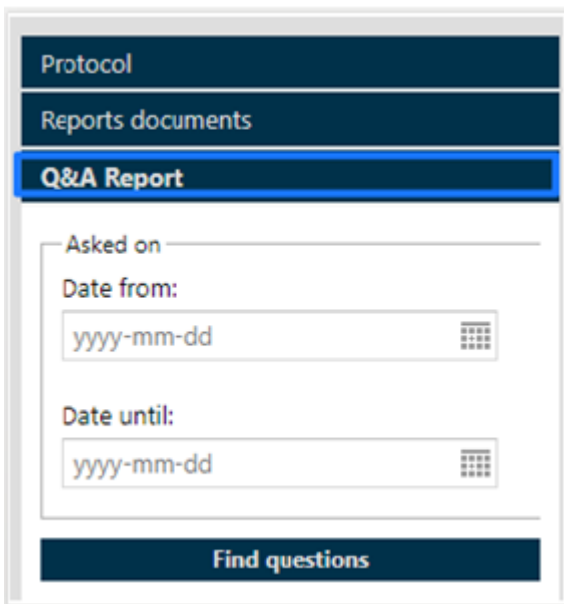


## 12.6 Q&A Report

To get to the Q&A Report, select „Q&A Report“ within the menu.

Following filter options are available:

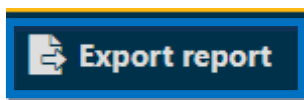
- Asked between (Date from and until)



The screenshot shows a filter interface for the Q&A Report. It features a vertical menu on the left with three options: "Protocol", "Reports documents", and "Q&A Report", which is highlighted with a blue border. To the right of the menu, there is a section titled "Asked on" containing two date input fields. The first field is labeled "Date from:" and the second is labeled "Date until:". Both fields have a placeholder text "yyyy-mm-dd" and a small calendar icon to their right. At the bottom of the filter section is a dark blue button labeled "Find questions".

## 12.7 Export Report

You can download all the logs displayed as an Excel file. To do this, click on "Export report" in the action bar.



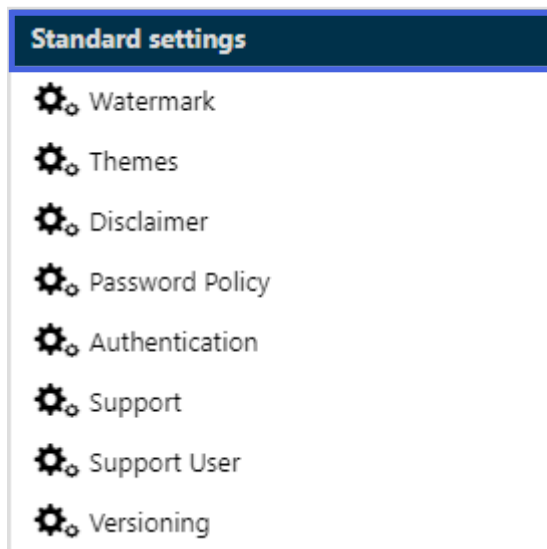
## 13 Administration

To get to Administration select "Administration" in the menu.



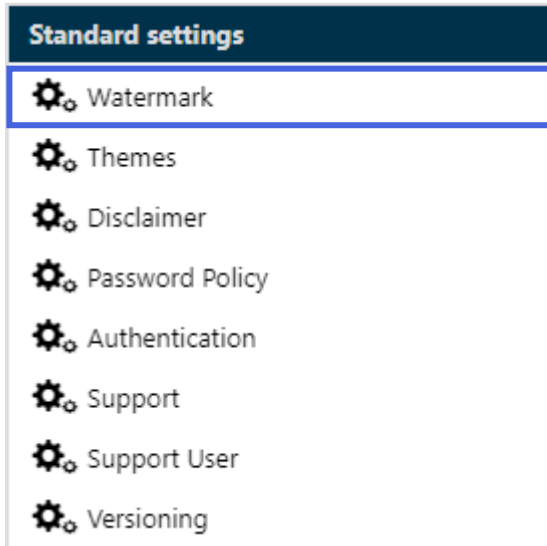
### 13.1 General settings

To get to General settings, click on the tab "General Settings"



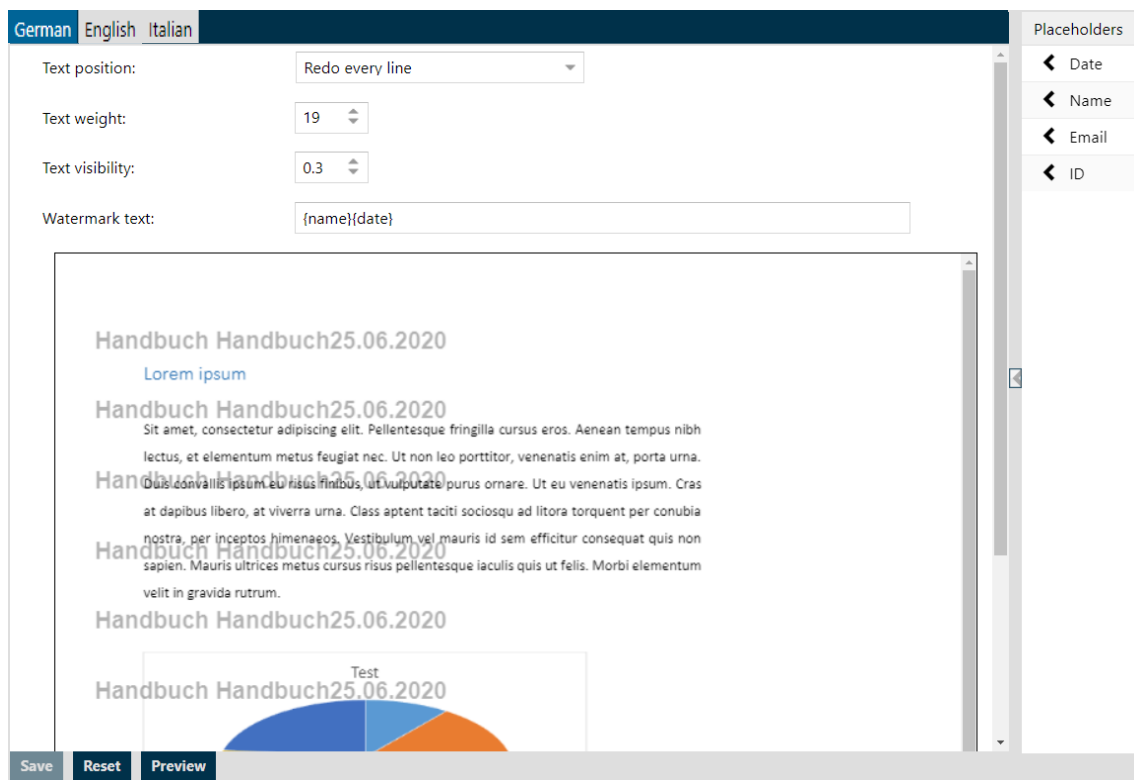
### 13.1.1 Watermarks

To adjust the watermark, select "Watermark".



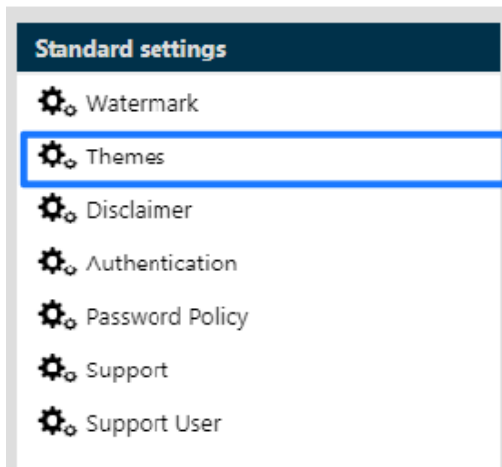
You can adjust the watermark in the user languages german, english or italian.

There is a "Preview" button so that you can have the configured watermark placed on a sample document.



### 13.1.2 Themes

To upload an individual logo, click "Themes".



Upload now the logo.


**Themes Settings**

Active: ☐

**Tip:** *The 4: 1 aspect ratio is best suited for an ideal representation of your logo  
The formats png and jpg / jpeg are supported.  
The logo may not exceed 16MB.*

Company logo:  **Upload**

Logo preview will shown on the left side, to activate the logo, click "Save".



Documents
 Users
 Groups
 Q&A
 Reports
 Administration

**Standard settings**

- Watermark
- Themes**
- Disclaimer
- Authentication
- Password Policy
- Support
- Support User

**Themes Settings**

Active: ☐

**Tip:** *The 4: 1 aspect ratio is best suited for an ideal representation of your logo  
The formats png and jpg / jpeg are supported.  
The logo may not exceed 16MB.*

Company logo:  **Upload**

Also, you can customize your data room with your own colors.

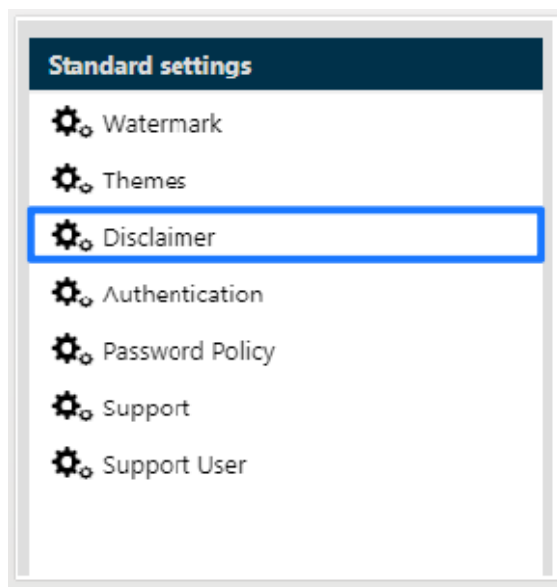
Background color for title bars, action toolbar, table headers and buttons, text color for service toolbar:	<input type="text" value="00314a"/>
Edge color:	<input type="text" value="fdb813"/>
Background color for main frame, tabs and service toolbar:	<input type="text" value="dedede"/>
Background color for content areas:	<input type="text" value="ffffff"/>
Text color for content:	<input type="text" value="000000"/>
Text color in title bars, action toolbar and buttons:	<input type="text" value="ffffff"/>

**Notice:** The system needs about 5 minutes to process the entered values. Afterwards, docuplus<sup>®</sup> is displayed according to the individual settings and colors.

To do this, simply change the preset colors to the colors of your company. When you have entered your colors and uploaded the logo, set the design to Active and save it.

### 13.1.3 Disclaimer

If you want to show a disclaimer to the users, you can set the disclaimer as follows: User text in german, english or italian, also you can activate or deactivate the disclaimer.



#### Disclaimer

Please confirm the disclaimer

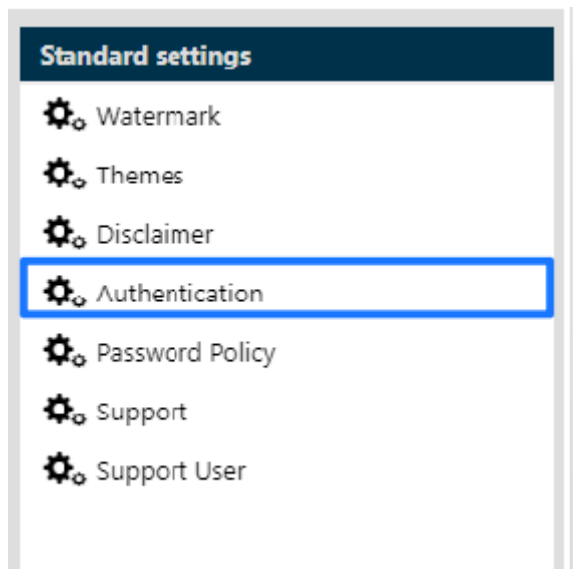
☒ **I read the disclaimer and accept it**

Also you can select, if the disclaimer should be displayed

- each Log in
- first Registration
- after Changes

### 13.1.4 Authentication

To improve the security of your dataroom, you can activate in „User settings“ Authentication for every user. The user receive after login a code via e-mail or sms. The code must be insert to get into the dataroom.



**Please verify**

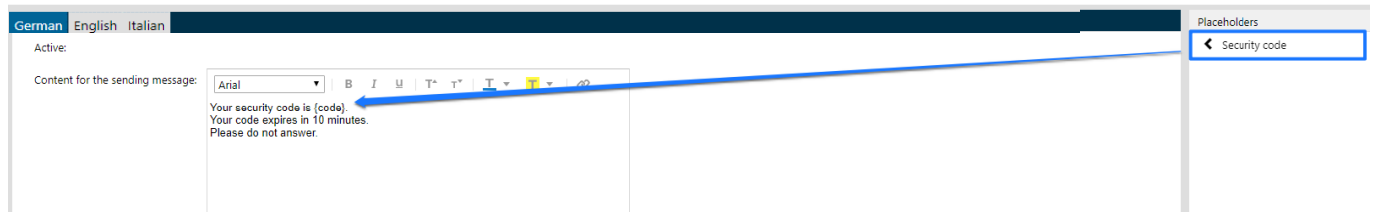
You will shortly receive an email or an SMS with the verification code, which you must enter in the text field

Enter verification code:

[Verify the verification code](#) [Send a new verification code](#) [Logout](#)



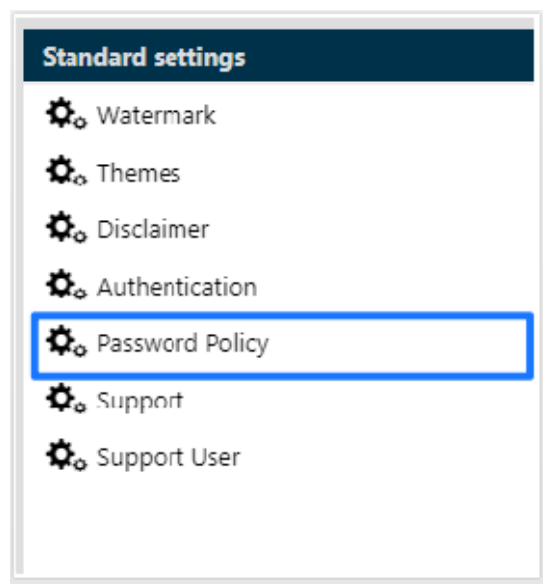
To globally de-/activate the verification click onto „Authentication“. You may also add your own text, don't forget to add the placeholder „{Code}\". The text can be added in german, english or italian.



### 13.1.5 Password guidelines

In case you have the module „password policy“ you can change the policies yourself. Without the module the default settings are:

- Password contains at least 8 characters
- Password includes special characters and numbers
- Password contains upper case letters
- After five retries the user will be blocked
- Users are allowed to reset their password



To edit the password policy, click „Password Policy“.

Standard settings	Password policy management
<ul style="list-style-type: none"> <li>Watermark</li> <li>Themes</li> <li>Disclaimer</li> <li>Authentication</li> <li><b>Password Policy</b></li> <li>Support</li> <li>Support User</li> </ul>	<p><b>Password strength</b></p> <p>Password has to contain characters [A,b,...]: <input type="checkbox"/></p> <p>Password has to contain upper case characters [A,B,...]: <input checked="" type="checkbox"/></p> <p>Password has to contain lower case characters [a,b,...]: <input checked="" type="checkbox"/></p> <p>Password has to contain numbers [1,2,...] or special characters: <input type="checkbox"/></p> <p>Password has to contain numbers [1,2,...]: <input checked="" type="checkbox"/></p> <p>Password has to contain special characters: <input checked="" type="checkbox"/></p> <p>Minimum character count (8): <input type="text" value="8"/></p> <p>Maximum character count (100): <input type="text" value="100"/></p> <p><b>Password history</b></p> <p>days between password changes: <input type="text" value="0"/></p> <p>days, maximum duration until password must be changed: <input type="text" value="0"/></p> <p>days until a former password can be reused: <input type="text" value="0"/></p> <p><b>Login-attempts</b></p> <p>failed login-attempts causing an automatic locking of the user account: <input type="text" value="5"/></p> <p>Allow user to reset their own forgotten password: <input checked="" type="checkbox"/></p> <p>For security reasons, you must change your password: <input checked="" type="checkbox"/></p> <p><i>0 deactivates the relevant option</i></p>
Metatag Settings	
Document type settings	
Email settings	
Q&A settings	
	<input type="button" value="Save"/> <input type="button" value="Reset"/>

### 13.1.6 Support

To edit the support settings, click „Support“.

To send support requests to the dataroom administrators or your department, you can change the e-mail address of the addresser. You can also adopt the text.

Standard settings	German	English
Watermark	Active:	✓
Themes	Address:	Biteno GmbH   Breitscheidstr. 65   70176 Stuttgart   Germany   Phone: +49 (0) 711 4889 085   Fax: +49 (0) 711 4889 029   E-mail: support@docurex.com
Disclaimer	Support email:	support@docurex.com
Authentication	Sender:	docurex
Password Policy	Subject:	Support request from {customerName}
<b>Support</b>	Email text:	<div> <div> Arial </div> <div> B I U T<sup>+</sup> T<sup>-</sup>   I T   </div> </div> <p>Dear Support Team,</p> <p>{question}</p> <p>Yours Sincerely</p> <p>{userFirstName} {userLastName}</p> <p>{callBack}</p> <p>{useremail}</p> <p>{customerName}</p> <p>Biteno GmbH Breitscheidstr. 65 70176 Stuttgart</p>
Support User		

### 13.1.7 Support user

To support you with your issue, our support team needs an access to your data room. The access comes due a support user. To de-/activate a support user click „Support User“. You also can set the validity of the support user.

Standard settings	Support User (German)
<ul style="list-style-type: none"> <li>Watermark</li> <li>Themes</li> <li>Disclaimer</li> <li>Authentication</li> <li>Password Policy</li> <li>Support</li> <li><b>Support User</b></li> </ul>	<p>Active: <input type="checkbox"/></p> <p>Activate for: <input type="text"/></p> <p>Active from: <input type="text" value="yyyy-mm-dd"/></p> <p>Active until: <input type="text" value="yyyy-mm-dd"/></p>

### 13.1.8 Document versioning

If you have the Document versioning module, you can create multiple versions of a single document. To activate versioning, check the box and set a standard option when uploading the documents.

Standard settings	Versioning
<ul style="list-style-type: none"> <li>Watermark</li> <li>Themes</li> <li>Disclaimer</li> <li>Password Policy</li> <li>Authentication</li> <li>Support</li> <li>Support User</li> <li><b>Versioning</b></li> </ul>	<p>Activate versioning of documents: <input checked="" type="checkbox"/></p> <p>Default option for uploads: <input type="text" value="w version of the existing document"/></p> <ul style="list-style-type: none"> <li>Skip document</li> <li>Rename document</li> <li><b>New version of the existing document</b></li> </ul>

You can view the history of the documents in the info area of the relevant file.

### 13.1.9 Path length limitation

To enable/disable the path length limitation please select the "Path length limitation" item.

Standard settings	Path length limitation
<ul style="list-style-type: none"><li>Watermark</li><li>Themes</li><li>Disclaimer</li><li>Authentication</li><li>Password Policy</li><li>Support</li><li>Support User</li><li>Versioning</li><li><b>Path length limitation</b></li></ul>	<p>If you activate the path length limitation, the folder structure of this data room will be reviewed and the length of the created paths (including file names) will be determined. In order to activate the path length limitation, path lengths must not exceed 245 characters. As long as this is still the case, the limitation cannot be activated. This process can take a few seconds.</p> <p>Activate path length limitation for the data room: <input type="checkbox"/></p>

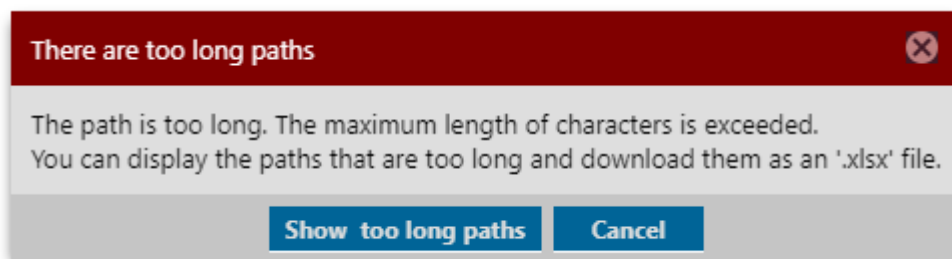
If the checkbox is unchecked, it means that the path length limit is not active. If this is the case, you cannot request exports of your dataroom.

If the checkbox is active, the maximum total length or total depth of the paths in your data room is limited. This allows you to request exports again.

In addition, you can no longer create paths in your data room that are too long, such as by uploading documents, creating folders or renaming them.

Activate path length limitation for the data room: ☐

If you activate the path length limitation at a later time, when your folder structure already exceeds the maximum total length, then you can display the list of all paths that are too long and download it as an Excel file.



Just select here in the message box on "Show too long paths" and you get a list of all paths that are too long.

Too long paths		
Folder / file path	Number of characters to be reduced	Total length of folder / file path
Handbuch/Ordner 1/Ordner 1.1/Ordner 1.2/Unterordner 1.3/Ne...	22	267
Handbuch/Ordner 1/Ordner 1.1/Ordner 1.2/Unterordner 1.3/Ne...	9	254
<div> Download paths (.xls) Finish </div>		

If you want to download this list as an Excel file click on "Download paths".

In the Excel file below you will get the total length of the paths and the number of characters you have to shorten.








Folder / file path	Number of characters to be reduced	Total length of folder / file path
Handbuch/Ordner 1/Ordner 1.1/Ordner 1.2/Unterordner 1.3/Neuer Unterordner 1.4/Ordner 2.1/Ordner 2.2/Unterordner 2.3/Neuer Unterordner von 2.3 - 2.4/Ordner 3/Unterordner 3.1/Unterordner 3.2/Neuer Unterordner 3.3/Neuer Unterordner 3.4/Neuer Unterordner 3.5/Handbuch.pdf	22	267
Handbuch/Ordner 1/Ordner 1.1/Ordner 1.2/Unterordner 1.3/Neuer Unterordner 1.4/Ordner 2.1/Ordner 2.2/Unterordner 2.3/Neuer Unterordner von 2.3 - 2.4/Ordner 3/Unterordner 3.1/Unterordner 3.2/Neuer Unterordner 3.3/Neuer Unterordner 3.4/Neuer Unterordner 3.5	9	254

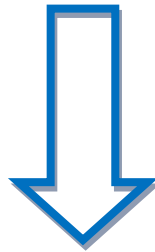
### 13.1.10 Automatic numbering








You can create an automatic numbering for your folders and files in your data room. for your folders. To do this, click on the "Automatic numbering" item. Here you can numbering individually.

Standard settings	Automatic numbering
<ul style="list-style-type: none"> <li>Watermark</li> <li>Themes</li> <li>Disclaimer</li> <li>Password Policy</li> <li>Authentication</li> <li>Support</li> <li>Support User</li> <li>Versioning</li> <li>Path length limitation</li> <li><b>Automatic numbering</b></li> </ul>	<p><b>Folder numbering</b></p> <p>Automatic numbering of folders is done per folder level. The entire numbering prefix is automatically placed in front of the folder name and is part of the folder name. e.g. <b>5.13.123</b> folder name or <b>005-013-123</b> folder name.</p> <p>Numbering active for folder: <input checked="" type="checkbox"/></p> <p>Leading zeros: <input type="text" value="0"/></p> <p>Attach number from all parent folders: <input type="checkbox"/></p> <p>Separator for the folder levels (e.g. 5.13.4)*: <input type="text" value="."/></p> <p>Separator between number and folder name (default " ")*: <input type="text"/></p> <p><b>File numbering</b></p> <p>Automatic numbering of documents is done per folder level. The entire numbering prefix is automatically placed before the document name and is part of the document name. zB: <b>5 - &lt;\b&gt; document name</b></p> <p>Numbering active for documents: <input type="checkbox"/></p> <p>Leading zeros: <input type="text" value="0"/></p> <p>Separator between number and document name (default " ")*: <input type="text" value="."/></p>

When you save these settings, your folder appearance will change as follows as follows:








-  Handbuch	3
-  Ordner 1	3
-  Ordner 1.1	3
-  Ordner 1.2	-
+  Unterordner 1.3	-
 Ordner 2	4
+  Ordner 3	4

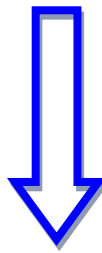









-  Handbuch	3
-  Ordner 1	3
-  Ordner 1.1	3
-  Ordner 1.2	-
+  Unterordner 1.3	-
 Ordner 2	4
+  Ordner 3	4



Your document display will then look like this:

<input type="checkbox"/>	Name
<input type="checkbox"/>	 Test.txt
<input type="checkbox"/>	 Handbuch_DE_- 3.3.11.doc
<input type="checkbox"/>	 Muster.docx
<input type="checkbox"/>	 MusterNeu.docx
<input type="checkbox"/>	 loremipsum.txt
<input type="checkbox"/>	 Dokument1.txt
<input type="checkbox"/>	 Test2.txt



<input type="checkbox"/>	Name
<input type="checkbox"/>	 1 - Test.txt
<input type="checkbox"/>	 2 - Handbuch_DE_- 3.3.11.doc
<input type="checkbox"/>	 3 - Muster.docx
<input type="checkbox"/>	 4 - MusterNeu.docx
<input type="checkbox"/>	 5 - loremipsum.txt
<input type="checkbox"/>	 6 - Dokument1.txt
<input type="checkbox"/>	 7 - Test2.txt

### 13.1.11 LDAP Settings

Here you can store your configuration for your Active Directory and link it to Docurex (if you have the LDA module).

*Tip: for the configuration or for the information you need to enter, contact your internal IT administrator.*

The settings are divided into 4 sections.

#### Server connection

##### **Server connection:**

Host:	<input type="text"/>
Port:	<input type="text"/>
Encryption:	<input type="text"/>

**Test connection**

Please enter here the host, the port and the encryption of your active directory. Once you have entered everything, you can test whether you can establish a connection to the corresponding server.

#### Bind credentials

In this area you have to add the Bind credentials.

##### **Bind credentials:**

Credentials:	<input type="text"/>
Password:	<input type="password"/>

**Change password**

**Test credentials**

To do this, enter the *distinguishedName* of a user and their password.

Here you can also test the connection directly.

## User Provider

In the 3rd area you can specify the user node, this is the area from which the users are to be loaded.

### **User Provider**

Authentication  
containers:

Extended query:

**Test User Provider**

You can also test this immediately.

If all tests are successful, save your entries and now you can import users via LDAP in the user administration.

## Automatic import of users from LDAP

In the 4th area you can activate the automatic synchronisation for the LDAP users. You can also trigger the synchronisation manually using the button on the right side.

### **Import users from LDAP**

Automatic  
synchronization:

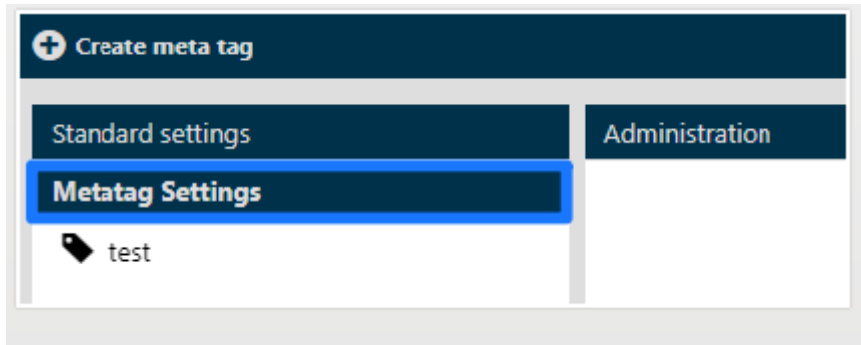
☐

**Sync manually**

You can store the filter query of the LDAP groups/nodes for synchronisation in the respective groups in the data room.

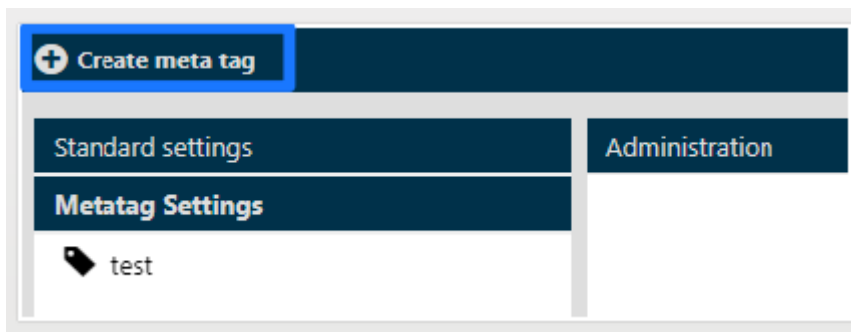
## 13.2 Metatag settings

To get to the metatag settings, click on the tab "Metatag Settings".



### 13.2.1 Create new metatag

Click in the action strip "Create meta tag".



Now you can set the informations and settings of the metatag.

+ Add language
- Delete language

Standard settings
Meta tag settings (German)

**Metatag Settings**

Meta tag name

Active: ☒

Meta tag name: contract type

Metatag description: Metatag for contract type

Position in naming convention: 2

Mandatory field: ☒

Meta tag field type: List

New value Delete selected value

Values

House

### 13.2.2 Copy metatag

To copy a metatag, select the metatag from the list and click into the action strip "Copy metatag" in the action strip.

+ Add language
- Delete language
+ Create meta tag
Copy meta tag

Standard settings
Meta tag settings (German)

**Metatag Settings**

Meta tag name

Active: ☒

Meta tag name: contract type

Metatag description: Metatag for contract type

Position in naming convention: 2

Mandatory field: ☒



Meta tag field type: List

New value Delete selected value

Values

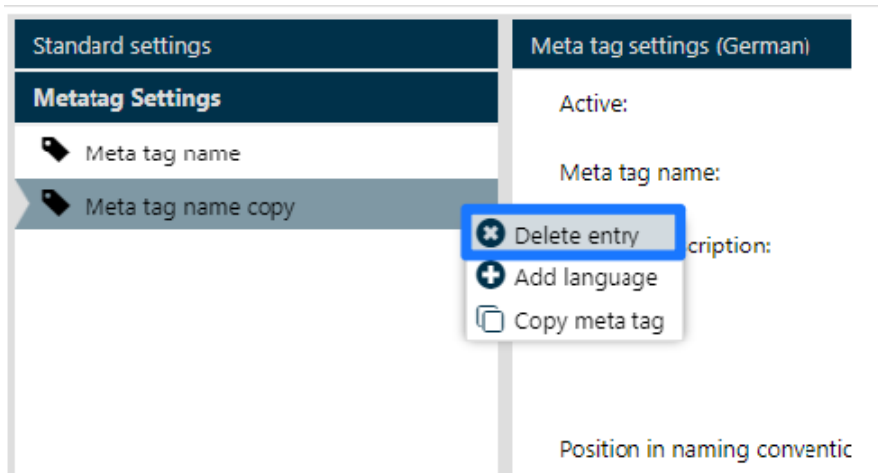
House

A new meta tag pops up.

Standard settings	Meta tag settings (German)
<b>Metatag Settings</b>	
 Meta tag name	Active: <input checked="" type="checkbox"/>
 Meta tag name copy	Meta tag name: <input type="text" value="contract type"/>
	Metatag description: <div><div>Metatag for contract type</div></div>
	Position in naming convention: <input type="text" value="2"/>
	Mandatory field: <input checked="" type="checkbox"/>
	Meta tag field type: <input type="text" value="List"/>
	<div><div>New value</div><div>Delete selected value</div></div>
	<div>Values</div> <div>House</div>
Document type settings	
Email settings	
Q&A settings	
	<div>Save</div> <div>Reset</div>

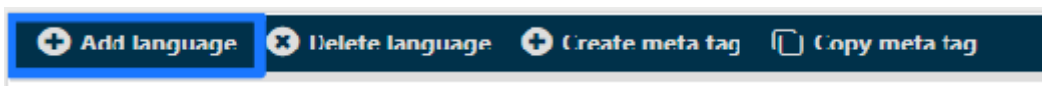
### 13.2.3 Delete metatag

To delete a metatag, select the required metatag and right click. Under the context menu you can delete the metatag.



### 13.2.4 Create language

To offer the languages german, english or Italian for your metatag, select the required metatag and click „Add language“ in the action strip.

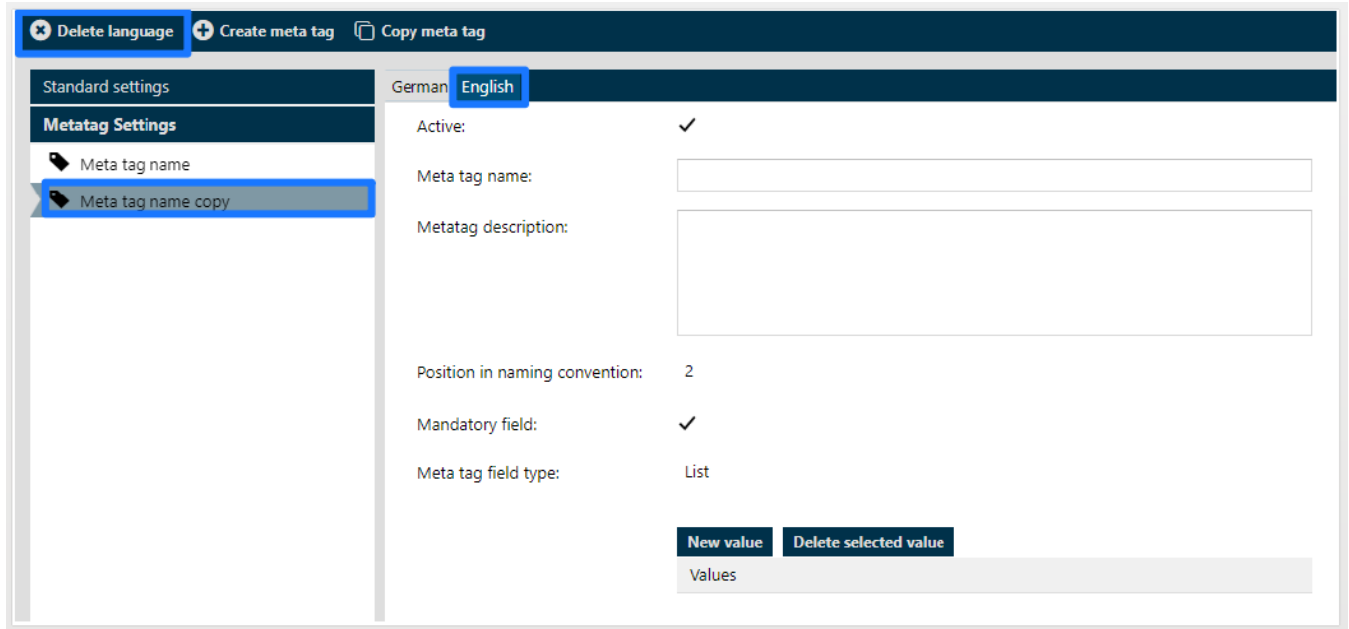


Now you can add Informations and settings of the metatag for the english version.

German	English	Italian
Active:	✓	
Meta tag name:	<input type="text"/>	
Metatag description:	<input type="text"/>	
Position in naming convention:	2	
Mandatory field:	✓	
Meta tag field type:	List	
<div> <input type="button" value="New value"/> <input type="button" value="Delete selected value"/> </div>		
<div>Values</div>		

### 13.2.5 Delete language key

To delete a language entry, select meta tag, click on the tab “English”, and click “Delete language” in the action strip.



The screenshot shows the Docurex user interface. At the top, there is an action strip with three buttons: "Delete language" (highlighted with a blue box), "Create meta tag", and "Copy meta tag". Below the action strip, there are two tabs: "German" and "English" (highlighted with a blue box). The "English" tab is active, showing the following settings:

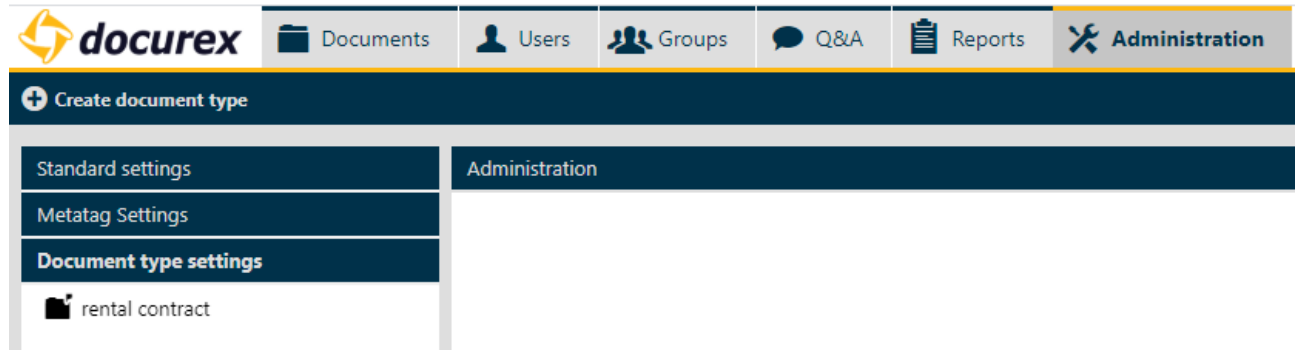
- Active: ☒
- Meta tag name:
- Metatag description:
- Position in naming convention: 2
- Mandatory field: ☒
- Meta tag field type: List

At the bottom right, there are two buttons: "New value" and "Delete selected value". Below these buttons is a section labeled "Values" with a list of values.



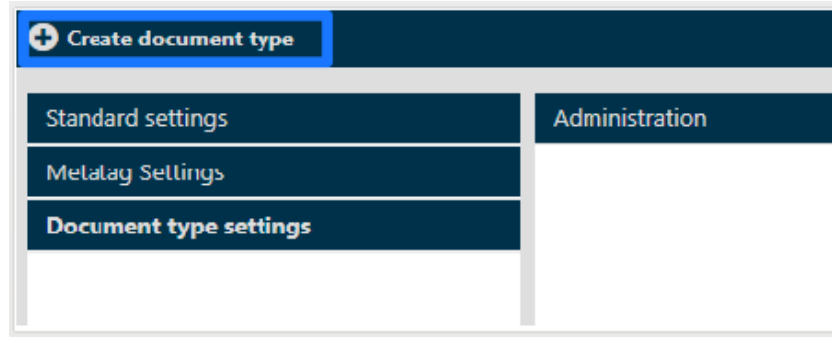
### 13.3 Document type settings

To get to the document type settings click in the tab „Document type Settings“.



#### 13.3.1 Create document type

Click „Create document type“ in the the action strip.



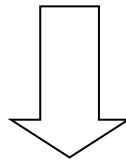
Now you can set the informations and settings for the document type.

Standard settings	Document type settings (German)	
Metatag Settings	Active:	<input checked="" type="checkbox"/>
Document type settings	Document type name:	rental contract
Document type name	Document type description:	Document type for lease
	Position in naming convention:	1
	Meta tags:	contract type x

### 13.3.2 Copy document type

To copy a document type, select the document from your list and click in the action strip "Copy document type". The new document type will be displayed.

Standard settings	Document type settings (German)
Metatag Settings	Active: <input checked="" type="checkbox"/>
<b>Document type settings</b>	Document type name: rental contract
rental contract	Document type description: Document type for lease
rental contract copy	Position in naming convention: 1
	Meta tags: contract type x

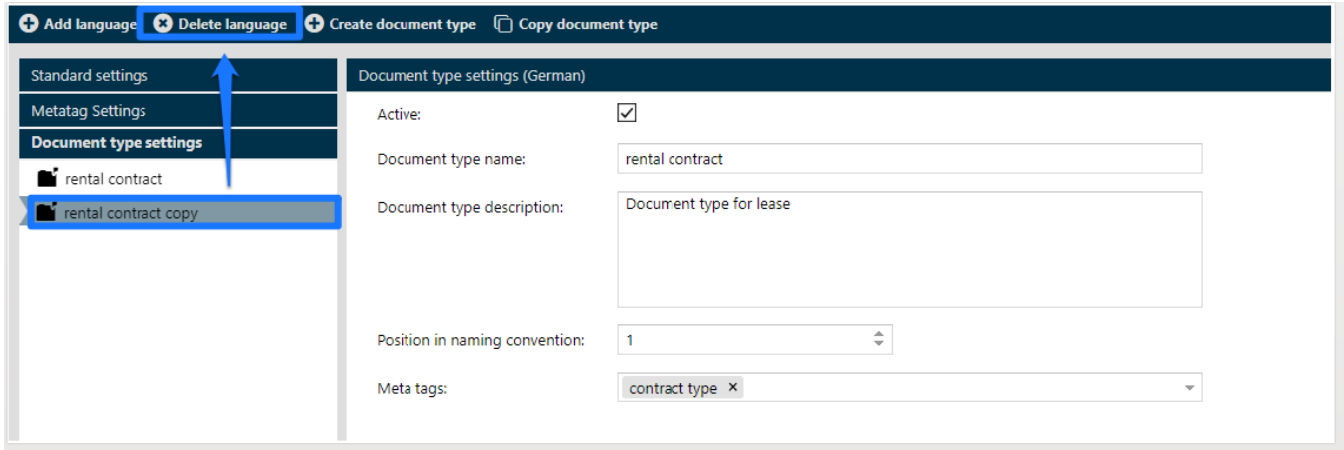


+ Add language    x Delete language    + Create document type <b>Copy document type</b>	
Standard settings	Document type settings (German)
Metatag Settings	Active: <input checked="" type="checkbox"/>
<b>Document type settings</b>	Document type name: rental contract
rental contract	Document type description: Document type for lease
	Position in naming convention: 1
	Meta tags: contract type x

*Hint:* The copied document type is added only temporarily! Adjust the input/settings and click save to permanently save the document type.

### 13.3.3 Delete document type

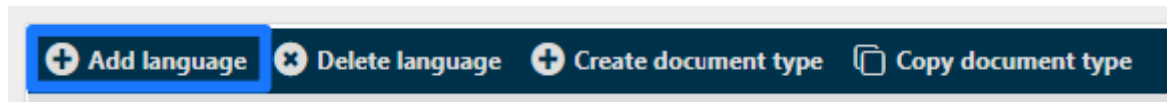
To delete a document type, select the required document type and use the right click context menu and select "Delete document type"



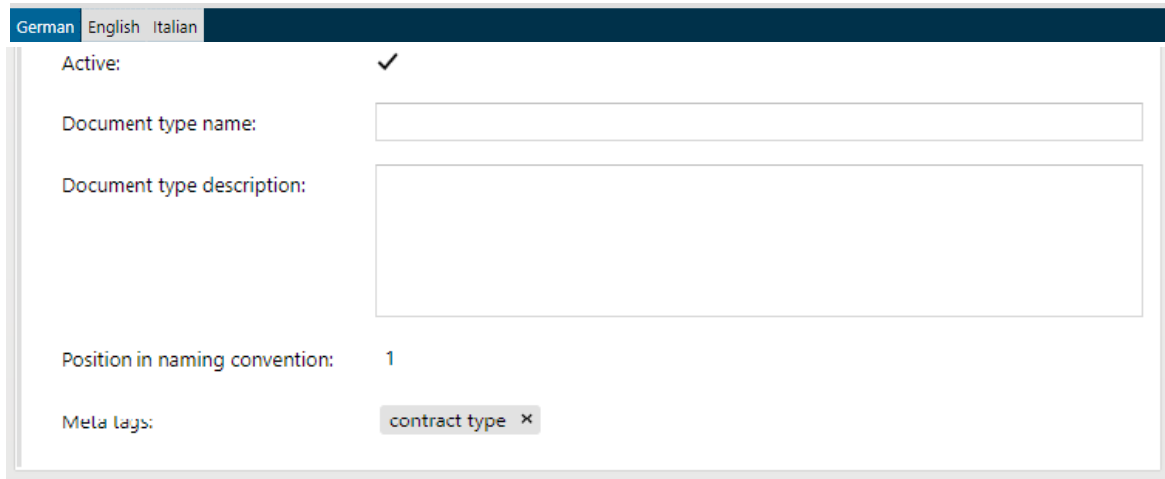
The screenshot shows the Docurex user interface. At the top, there is a dark blue header bar with four buttons: "Add language", "Delete language", "Create document type", and "Copy document type". The "Delete language" button is highlighted with a blue box. Below the header, on the left, is a sidebar with a list of document types under the heading "Document type settings". The list includes "rental contract" and "rental contract copy". The "rental contract copy" item is highlighted with a blue box. A blue arrow points from this item to the "Delete language" button. On the right, the "Document type settings (German)" panel is visible, showing fields for "Active" (checked), "Document type name" (rental contract), "Document type description" (Document type for lease), "Position in naming convention" (1), and "Meta tags" (contract type).

### 13.3.4 Create language

To offer german, english or Italian for your document type, select the document type and click "Add language" in the action strip.



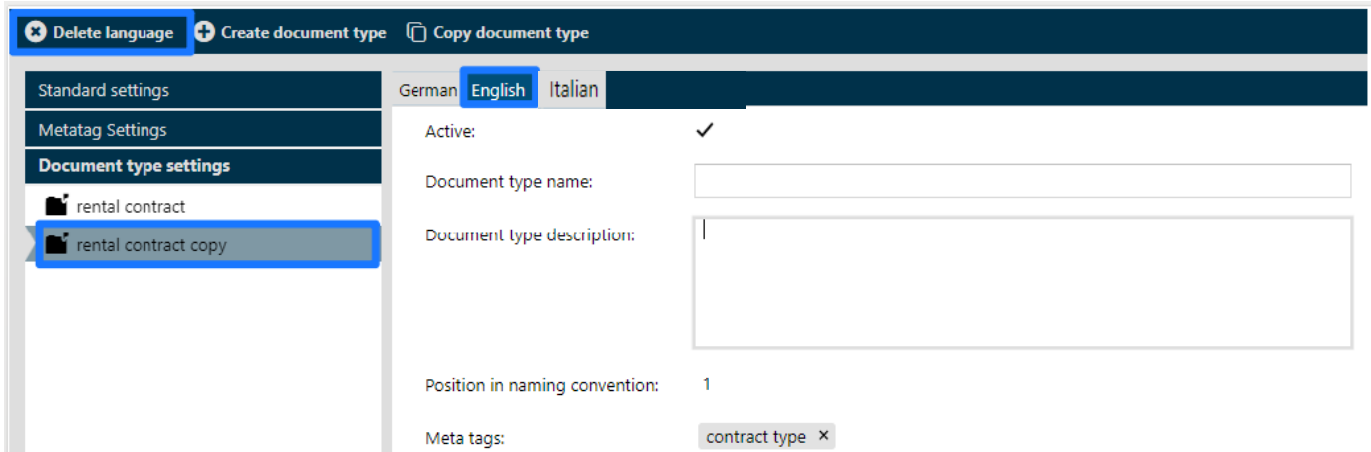
Now you can add Informations and Setting for the english version.

The image shows a form for adding a new language version. At the top, there are tabs for 'German', 'English', and 'Italian', with 'English' currently selected. The form contains the following fields:

- Active:** A checkbox that is checked, indicated by a checkmark icon.
- Document type name:** A text input field.
- Document type description:** A larger text area for a description.
- Position in naming convention:** A text input field containing the number '1'.
- Meta tags:** A tag management area showing a tag 'contract type' with a close button (x).

### 13.3.5 Delete language

To delete a language entry, select required document type and click „english“ (or german/italian) and click on the action strip „Delete language“.



The screenshot shows the Docurex user interface. At the top, there is a dark blue header bar with three buttons: 'Delete language' (highlighted with a red box), 'Create document type', and 'Copy document type'. Below the header, on the left, is a sidebar with a menu. The menu items are 'Standard settings', 'Metatag Settings', 'Document type settings', 'rental contract', and 'rental contract copy' (highlighted with a red box). The main content area has a tabbed interface with 'German', 'English' (highlighted with a red box), and 'Italian' tabs. Below the tabs, there are several fields: 'Active:' with a checked checkbox, 'Document type name:' with an empty text box, 'Document type description:' with a large empty text area, 'Position in naming convention:' with the value '1', and 'Meta tags:' with a tag 'contract type' and a close button 'x'.

## 13.4 Email settings

In case you have the module "e-mail templates" you are able to change all e-mail send by docurex. You may adjust the footer or the e-mails or the scheduled time of delivery.

To get to the "e-mail templates" select the tab "e-mail settings".

Standard settings
Metatag Settings
Document type settings
**Email settings**

Create user
Create user info to admin
Download link
Edit user
New files
Reset password
Reset password success
Send self files
Lock user
Create question

German English
Active: ☒
Name: Admininfo Account angelegt
Action: User created
Transmission time: Send email immediately
Sender: docurex
Receiver: -- executive user--
Subject: Account auf app.docurex.com Mandant (customerName) erfolgreich angelegt
Email text:

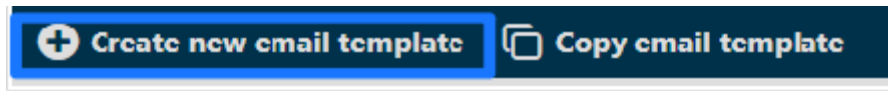
Arial

B I U T<sup>+</sup> T<sup>-</sup> T<sub>1</sub> T<sub>2</sub> T<sub>3</sub>

Sehr geehrte(r) Frau/Herr {adminname},  
Sie haben den Benutzer {userLoginName} erfolgreich angelegt.

### 13.4.1 Create new e-mail template

To create a new e-mail template, click on the action strip "Create new email template."



Now you can set the information for the new email template.

Under "Action" you can edit in which action the e-mail should be sent. Under transmission time you can set, who should get the e-mail.

Standard settings	Email administration (German)
Metatag Settings	Active: <input checked="" type="checkbox"/>
Document type settings	Name: <input type="text" value="Admin User locked"/>
<b>Email settings</b>	Action: <input type="text" value="User was locked"/>
<input checked="" type="checkbox"/> Create user	Transmission time: <input type="text" value="Send emails in 30 minutes"/>
<input checked="" type="checkbox"/> Create user info to admin	Sender: <input type="text" value="docurex"/>
<input checked="" type="checkbox"/> Download link	Receiver: <input type="text" value="--dataroomadmin--"/>
<input checked="" type="checkbox"/> Edit user	Subject: <input type="text" value="Admin User locked"/>
<input checked="" type="checkbox"/> New files	Email text: <div> <div>Arial</div> <div>B I U T<sup>+</sup> T<sup>-</sup> T<sub>u</sub> T<sub>b</sub> Link List</div> <div></div> </div>
<input checked="" type="checkbox"/> Reset password	
<input checked="" type="checkbox"/> Reset password success	
<input checked="" type="checkbox"/> Send self files	
<input checked="" type="checkbox"/> Lock user	
<input checked="" type="checkbox"/> Create question	
<input checked="" type="checkbox"/> Create answer	
<input checked="" type="checkbox"/> Approve question	
<input checked="" type="checkbox"/> Create email template	

### 13.4.2 Copy e-mail template

To copy an e-mail template, select the required e-mail template from the list und click "Copy email template" on the action strip.

Create new email template

Copy email template

Standard settings

Metatag Settings

Document type settings

Email settings

Create user

Create user info to admin

Download link

Edit user

New files

Reset password

Reset password success

Send self files

Lock user

Create question

Create answer

Approve question

GermanEnglish

Active: ☒

Name:

Action: 

User edited

Transmission time: 

Send email immediately

Sender: 

docurex

Receiver: 

--affected account--

Subject:

Email text:

Arial

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T<sup>-</sup>

T

**T**

Sehr geehrte(r) Frau/Herr {userLastName},

Ihre Benutzerdaten im docurex Datenraum wurden geändert.

---

IHRE NEUEN ANMELDEDATEN

---

URL zum Datenraum: <https://app.docurex.com/>

Mandant: {customerName}

Login: {userLoginName}

Passwort: {userPassword}

Ihr Account steht Ihnen in dem folgenden Zeitraum zur Verfügung:

Gültig vom: {userActiveFrom}

Inaktiv ab: {userActiveUntil}



The new email template appears.

Hint: The new email template is temporary created, adjust the informations and click save to complete.

Standard settings	German	English
Metatag Settings		
Document type settings		
<b>Email settings</b>		
<input checked="" type="checkbox"/> Create user <input checked="" type="checkbox"/> Create user info to admin <input checked="" type="checkbox"/> Download link <input checked="" type="checkbox"/> Edit user <input checked="" type="checkbox"/> New files <input checked="" type="checkbox"/> Reset password <input checked="" type="checkbox"/> Reset password success <input checked="" type="checkbox"/> Send self files <input checked="" type="checkbox"/> Lock user <input checked="" type="checkbox"/> Create question <input checked="" type="checkbox"/> Create answer <input checked="" type="checkbox"/> Approve question <input checked="" type="checkbox"/> Edit user copy	<div> <div>Active:</div> <div><input checked="" type="checkbox"/></div> </div> <div> <div>Name:</div> <div>Zugangsdaten beim Bearbeiten</div> </div> <div> <div>Action:</div> <div>User edited</div> </div> <div> <div>Transmission time:</div> <div>Send email immediately</div> </div> <div> <div>Sender:</div> <div>docurex</div> </div> <div> <div>Receiver:</div> <div>--affected account--</div> </div> <div> <div>Subject:</div> <div>Wichtige Information zu Ihrem Datenraum-Account auf docurex.com</div> </div> <div> <div>Email text:</div> <div> <div> <div>Arial</div> <div>B I U T<sup>+</sup> T<sup>-</sup></div> <div> <div> <div></div> <div></div> <div></div> </div> </div> </div> <div> <p>Sehr geehrte(r) Frau/Herr {userLastName},</p> <p>Ihre Benutzerdaten im docurex Datenraum wurden geändert.</p> <p>-----</p> <p><b>IHRE NEUEN ANMELDEDATEN</b></p> <p>-----</p> <p>URL zum Datenraum: <a href="https://app.docurex.com/">https://app.docurex.com/</a></p> <p>Mandant: {customerName}</p> <p>Login: {userLoginName}</p> <p>Passwort: {userPassword}</p> <p>Ihr Account steht Ihnen in dem folgenden Zeitraum zur Verfügung:</p> <p>Gültig vom: {userActiveFrom}</p> <p>Inaktiv ab: {userActiveUntil}</p> </div> </div> </div>	

### 13.4.3 Delete e-mail template

To delete an e-mail template, select the required e-mail template and select "Delete e-mail template" in the action strip.

Delete language
Create new email template
Copy email template

Standard settings
Metatag Settings
Document type settings
**Email settings**

- Create user
- Create user info to admin
- Download link
- Edit user
- New files
- Reset password
- Reset password success
- Send self files
- Lock user
- Create question
- Create answer
- Approve question
- Edit user**

German
English

Active: ☒
  
Name: 
  
Action: User edited
  
Transmission time: Send email immediately
  
Sender: docurex
  
Receiver: --affected account--
  
Subject: 
  
Email text:

Arial
B
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U
T<sup>+</sup>
T<sup>-</sup>
I
T
Link
List

Dear Mrs./Mr. {userLastName},

your user data in the docurex deal room have been edited.

-----

YOUR NEW DATES OF REGISTRATION

-----

URL to the deal room: <https://app.docurex.com/index.php/login?lang=en>

Client: {customerName}

Login: {userLoginName}

Password: {userPassword}

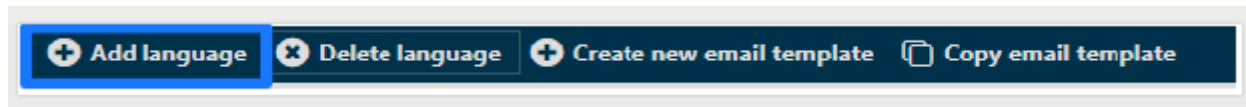
The period specified to access the deal room with your account is:

Valid from: {userActiveFrom}

Invalid from: {userActiveUntil}

#### 13.4.4 Create language entry

To offer german, english or Italian for your e-mail template, select required e-mail template und click „Add language“ on the action strip.



Now you can set informations and settings for the English version on the e-mail template.

German	English	Italian
Active:	✓	
Name:	<input type="text" value="Edit user"/>	
Action:	User edited	
Transmission time:	Send email immediately	
Sender:	docurex	
Receiver:	--affected account--	
Subject:	<input type="text"/>	
Email text:	<div><div>Arial ▼</div><div><b>B</b> <i>I</i> <u>U</u>   T<sup>^</sup> T<sup>v</sup>   <u>T</u> ▼ <b>T</b> ▼   🔗   ☰ ☷</div></div>	

### 13.4.5 Delete language

To delete a language, select required e-mail template, click on the tab "German" and click "delete language" in the action strip.

+

 Add language

x

 Delete language

+

 Create new email template

□

 Copy email template

Standard settings

Metatag Settings

Document type settings

Email settings

✖ Create user

✖ Create user info to admin

✖ Download link

✖ Edit user

✖ New files

✖ Reset password

✖ Reset password success

✖ Send self files

✖ Lock user

✖ Create question

✖ Create answer

✖ Approve question

✖ Edit user

Email administration (German)

Active: ☒

Name:

Action:

Transmission time:

Sender:

Receiver:

Subject:

Email text:
 

Arial

B I U T<sup>+</sup> T<sup>-</sup>

↶

↷

↻

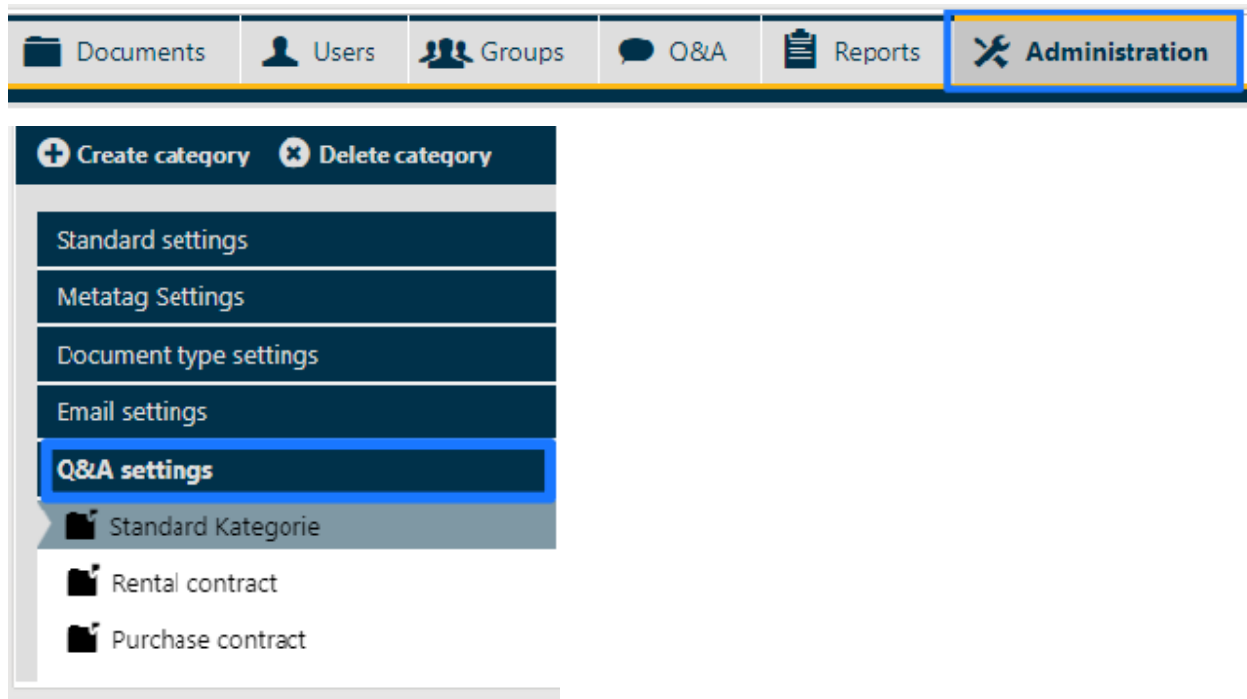
☰

☷

Sehr geehrte(r) Frau/Herr {userLastName},  
 Ihre Benutzerdaten im docurex Datenraum wurden geändert.  
 -----  
 IHRE NEUEN ANMELDEDATEN  
 -----  
 URL zum Datenraum: <https://app.docurex.com/>  
 Mandant: {customerName}  
 Login: {userLoginName}  
 Passwort: {userPassword}  
 Ihr Account steht Ihnen in dem folgenden Zeitraum zur Verfügung:  
 Gültig vom: {userActiveFrom}  
 Inaktiv ab: {userActiveUntil}

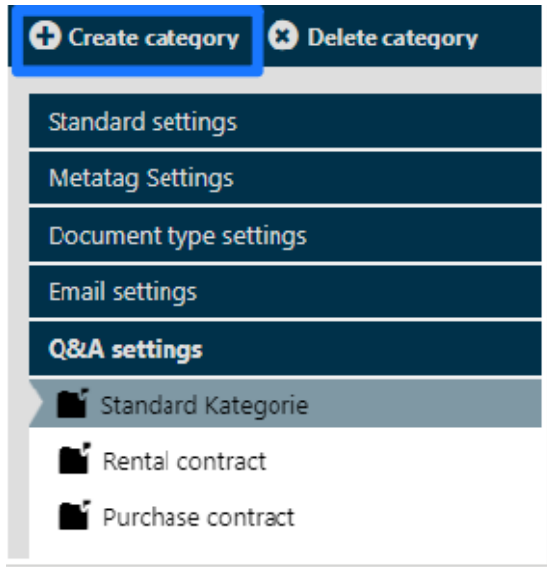
## 13.5 Q&A-Settings

To get to Q&A Settings, click on the Tab "Q&A Settings".



### 13.5.1 New category

To create a new category click on the action strip "new category".



You can set informations and settings for the new category as well for every group you can create permissions for the new category.

### Configure Q&A category 'Leases'.

Active: ☒





Name: Leases

Description: Category for leases

Approval is required: ☒

Question visability: private and public questions

Permissions (ask question) from c

-  Handbuch
- +  1 Ordner 1
-  2 Ordner 2
- +  3 Ordner 3

- private and public questions
- only private questions (visible for questioner, not for group members)
- only public questions (visible for all in questioners groups)

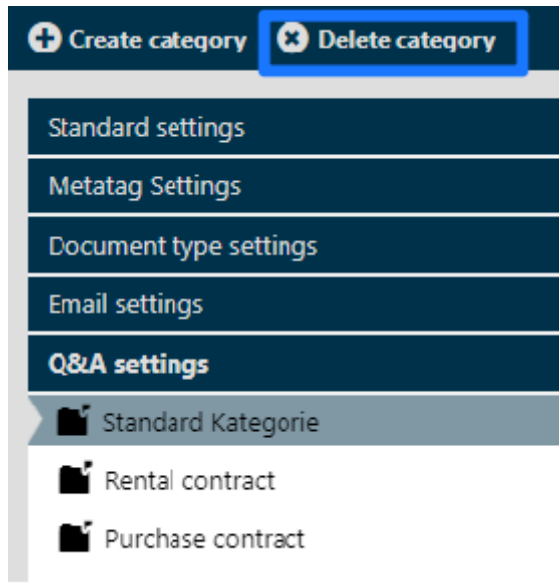
- ☐
- ☐
- ☒
- ☒

### Edit rights of category per group

Group ↑				
Benutzer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Group A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Group B	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
test	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### 13.5.2 Delete category

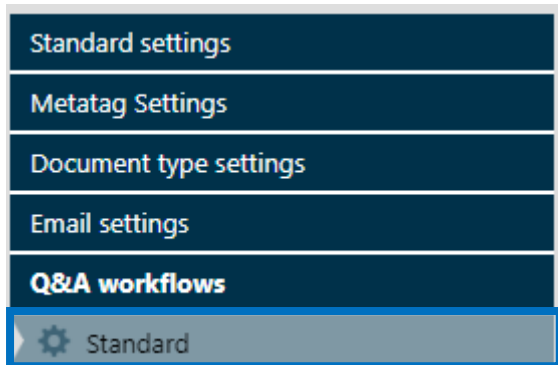
To delete a category, select your required category and click on the action strip "delete category"





## 13.6 Q&A Workflow

The Q&A Workflows tab is only available if you have the Q&A 2.0 module. Otherwise the Q&A Settings tab is located at this point.

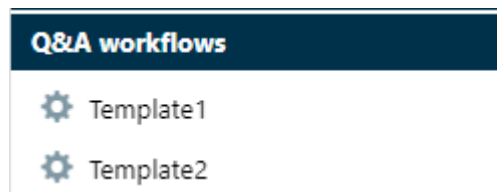


Here you will already find an automatically created standard workflow.

Here only the transitions, group assignments and permissions have to be created.

### 13.6.1 Workflow templates

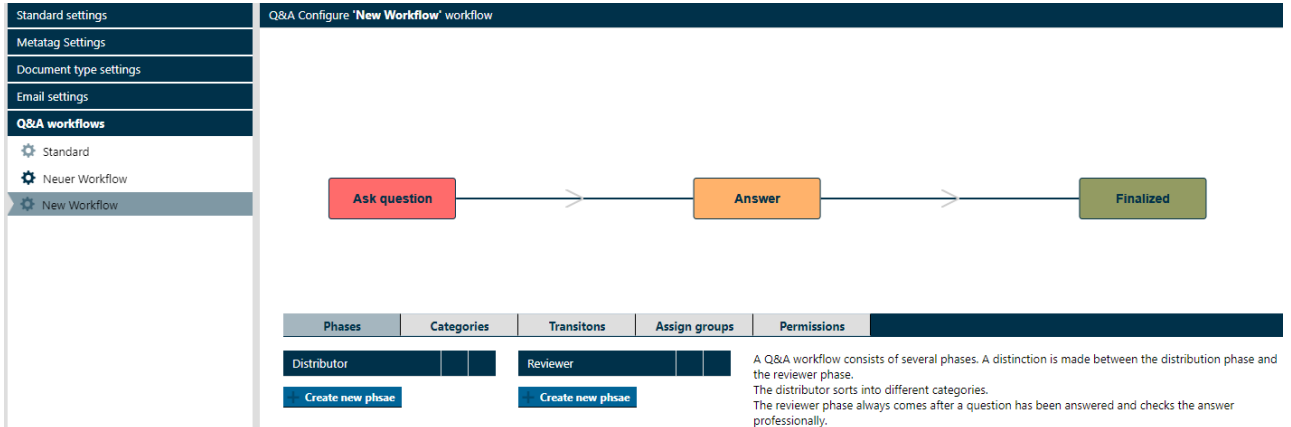
There are predefined workflows that are already configured and ready to use. All that is required is to add the users to the appropriate groups and activate the workflow.



Predefined workflows cannot be edited or deleted. They can only be set Active or Inactive and the category permissions on the respective folders can be changed.

### 13.6.2 Create new Workflow

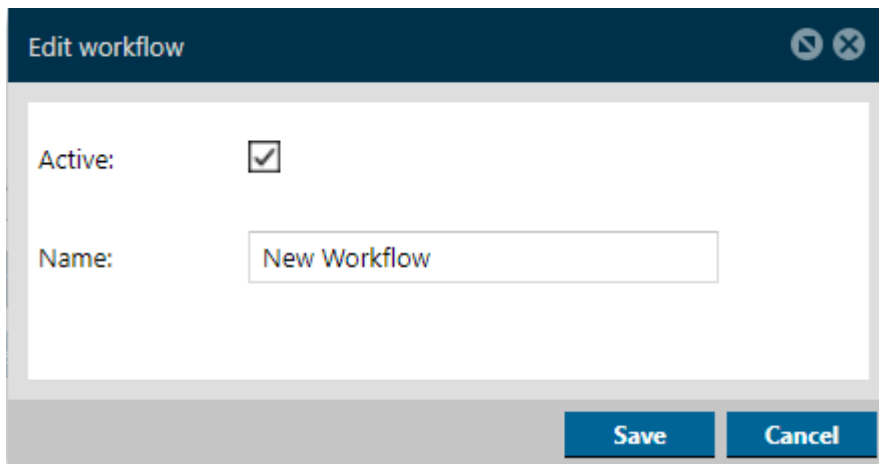
To create a new workflow, click on "Create new Workflow" and enter the name of your new workflow in the input field.



The new workflow is added to the list and can now be configured.

To change the workflow name or to select the workflow as Active Workflow, click "Edit workflow". A window will open in which you can activate the workflow and change its name.

There must always be an active workflow.

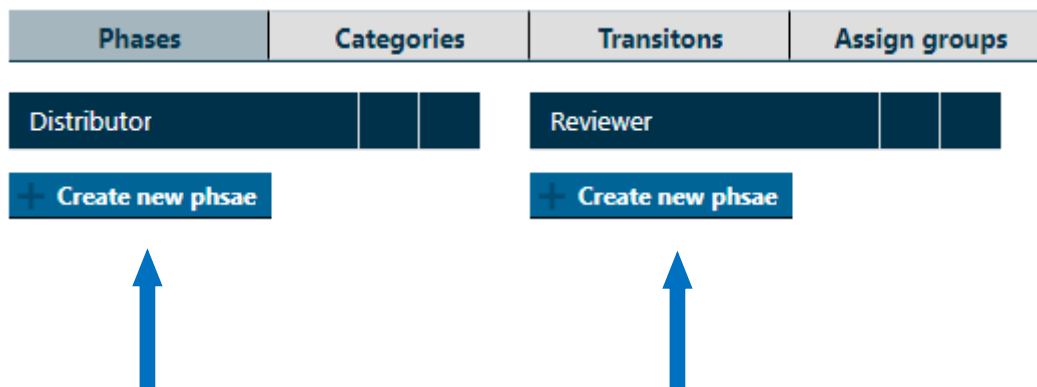


## Phases

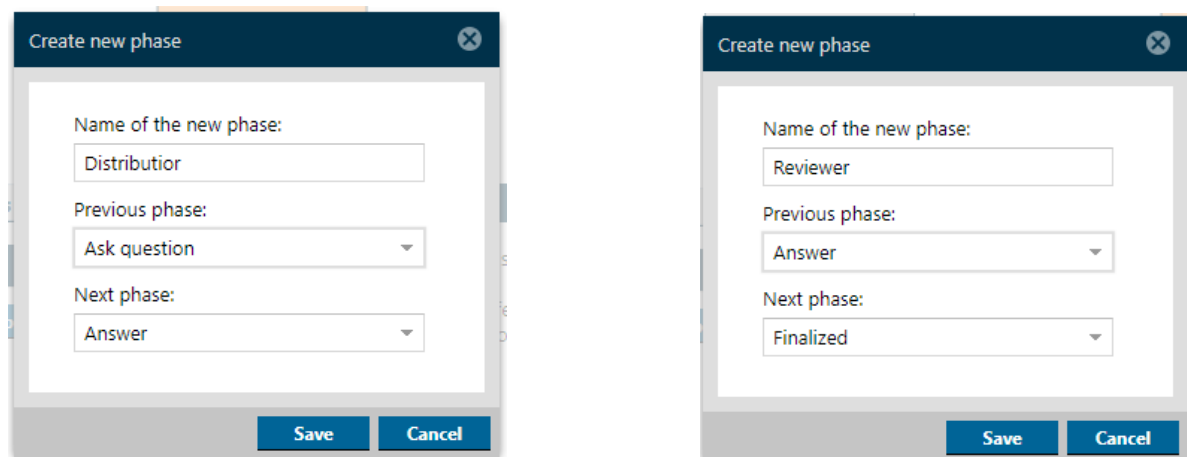
In addition to the three standard phases, you can also create distributor and Reviewer phases. The distributor sorts into different categories.

The Reviewer phase always comes after answering a question and checks the answer professionally.

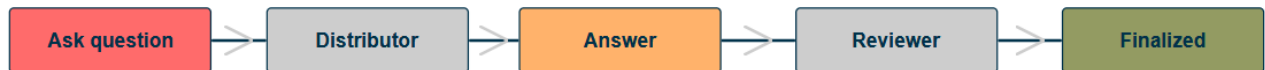
To create a new phase, click on "Create new phase".



A window opens in which you can assign a name to the new phase and select the previous and next phase.








When you have created a phase, the workflow shown updates with the new phases.



You can rename or delete your self-created phases any time.

To rename a phase click on the pencil icon and enter the new name.

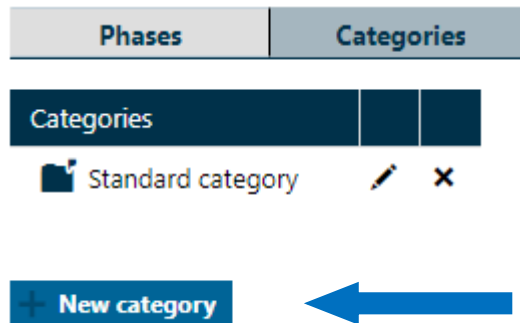
To delete a phase click on the "x" and confirm the deletion.

Distributor			Reviewer		
 Distributor			 Reviewer		
<a href="#">+ Create new phase</a>			<a href="#">+ Create new phase</a>		

## Categories

The default category is created automatically.

If you want to add more categories click on "New category".



You can now specify the information and settings for the new category. All categories can be deleted except the last one.

Active:

☒

Name:

Description:

Permissions (ask question) from category "undefined" to folder

Handbuch2

Folder 2

Unterordner 1

☐
☐
☐

Save

Cancel

## Transitions

In the "Transitions" area you can define the transitions of different states (combination of phase and category) for your questions.

A state always consists of the combination of phase and category.

A transition defines the transition from one state to another state.

Phases	Categories	Transitions	Assign groups
<b>State (from)</b> Ask question Ask question Answer Finalized Distributor Reviewer		<b>State (to)</b> Answer Standard category Standard category New Category	

Select the desired states from the available phases and categories and save this transition.

All saved transitions are displayed in a table. These can be deleted at any time.

State (from)	State (to)	
⌘ Ask question-Standard category	⌘ Distributor-Standard category	×
⌘ Distributor-Standard category	⌘ Answer-Standard category	×
⌘ Answer-Standard category	⌘ Reviewer-Standard category	×
⌘ Reviewer-Standard category	⌘ Finalized-Standard category	×
⌘ Finalized-Standard category	⌘ Reviewer-Standard category	×
⌘ Reviewer-Standard category	⌘ Answer-Standard category	×

## Assign groups

A transition must always be assigned to at least one group, which also may forward the question from one state to another.

To do this, please select a group and the available transitions that you have created. Then click on "New assignment".

Phases	Categories	Transitions	Assign groups	Permissions
<b>User Groups</b> <div>Administratoren ▼</div> <div>+ New assignment</div> <div>User Groups ↑</div>		<b>Available Transitions</b> <div>from 'Ask question-Standard categ ▼</div> <div>                     from 'Ask question-Standard category' to 'Distributor-Standard category'                      from 'Distributor-Standard category' to 'Answer-Standard category'                      from 'Answer-Standard category' to 'Reviewer-Standard category'                      from 'Reviewer-Standard category' to 'Finalized-Standard category'                      from 'Finalized-Standard category' to 'Reviewer-Standard category'                      from 'Reviewer-Standard category' to 'Answer-Standard category'                 </div>		

A state transition can only be executed by a user group if it is assigned to that group.

All created assignments are stored in a table below. In this table you can see the group and which transitions it is authorized to use.

All assignments can be deleted at any time.

User Groups ↓	State (from)	State (to)	
Benutzer	Answer-Standard category	Reviewer-Standard category	✕
Benutzer	Ask question-Standard category	Distributor-Standard category	✕
Administratoren	Answer-Standard category	Reviewer-Standard category	✕
Administratoren	Finalized-Standard category	Reviewer-Standard category	✕
Administratoren	Reviewer-Standard category	Finalized-Standard category	✕
Administratoren	Ask question-Standard category	Distributor-Standard category	✕

## Permissions

For each state (phase and category) the permissions can be defined per user group.

Phases	Categories	Transitons	Assign groups	Permissions
<b>State</b>			<b>User Groups</b>	<b>Permissions</b>
Ask question			Administratoren	<input type="checkbox"/> View questions <input type="checkbox"/> Create question <input checked="" type="checkbox"/> Create comment <input type="checkbox"/> Edit question
Standard category				

[+ New Right](#)

First select a phase and a category (state), then the user group that should receive permissions and finally assign the desired permissions by checking the respective checkboxes.

Now click on "New Right" and the permissions will be saved in the table below.

Phase	Category	User Groups					+	
Ask question	Standard category	Administratoren	✓	✓	✓	✓		✗
Answer	Standard category	Administratoren	✓		✓	✓	✓	✗
Finalized	Standard category	Administratoren	✓					✗
Distributor	Standard category	Administratoren	✓		✓	✓		✗
Reviewer	Standard category	Administratoren	✓		✓	✓	✓	✗

Here you have an overview of all set permissions.

These permissions can be overwritten by selecting the same phase, category and group as already existing, and then assign other permissions. The table will be updated with the newly set permissions.

Each line in this table can also be deleted.



## Description

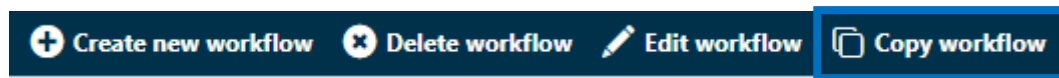
Here you will find the stored description for the respective workflow.

You can easily change the description when editing the workflow.

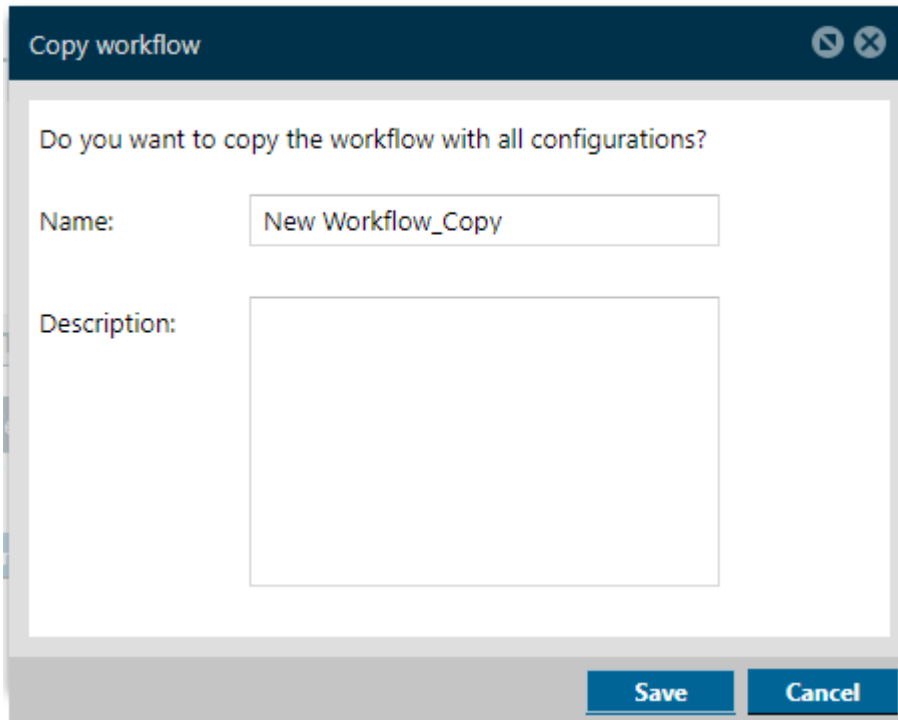
Phases	Categories	Transitions	Assign groups	Permissions	Description
<p>Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet.</p> <p>Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue dui dolore te feugait nulla facilisi. Lorem ipsum dolor sit amet, consetetur adipiscin elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat.</p> <p>Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat. Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis at vero eros et accumsan et iusto odio dignissim qui blandit praesent luptatum zzril delenit augue dui dolore te feugait nulla facilisi.</p> <p>Nam liber tempor cum soluta nobis eleifend option congue nihil imperdiet doming id quod mazim placerat facer possim assum. Lorem ipsum dolor sit amet, consetetur adipiscin elit, sed diam nonummy nibh euismod tincidunt ut laoreet dolore magna aliquam erat volutpat. Ut wisi enim ad minim veniam, quis nostrud exerci tation ullamcorper suscipit lobortis nisl ut aliquip ex ea commodo consequat.</p> <p>Duis autem vel eum iriure dolor in hendrerit in vulputate velit esse molestie consequat, vel illum dolore eu feugiat nulla facilisis.</p> <p>At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur</p>					

### 13.6.3 Copy Workflow

Each workflow can also be copied. To do this, select the workflow to be copied and then select the "Copy workflow" option in the toolbar.



A window opens in which you can specify the name of the new workflow. You can also enter a description. (The description is optional)

A dialog box titled 'Copy workflow' with a dark blue header bar containing a close button. The main area is white and contains the text 'Do you want to copy the workflow with all configurations?'. Below this, there are two input fields: 'Name:' with a text box containing 'New Workflow\_Copy', and 'Description:' with a larger, empty text area. At the bottom right, there are two buttons: 'Save' and 'Cancel'.

When you have filled in everything, you can save the workflow.

All configurations of the copied workflow will be transferred to the new one. You can then adjust these if necessary.