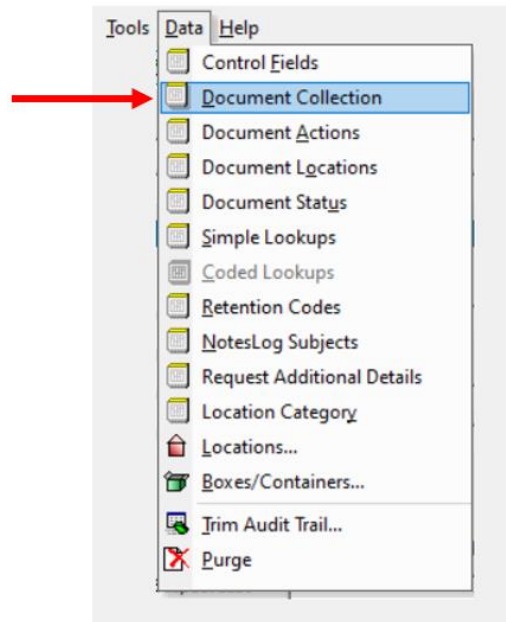


# FileOnQ eDocs

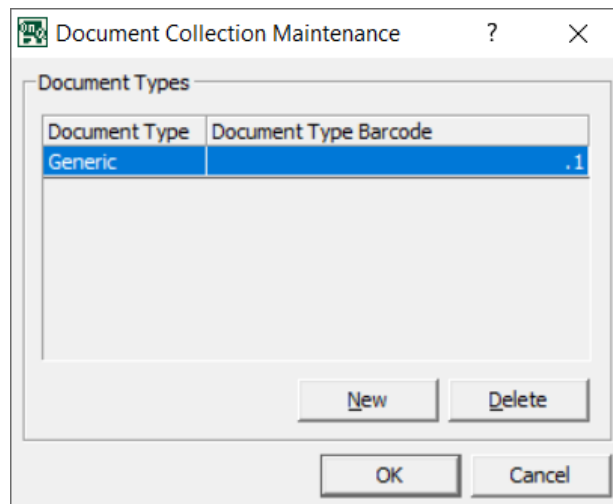
## Creating New Document Types

You must have certain administrator-level user permissions within the FileOnQ system to create new eDocs ‘Document Types.’ If you’re currently able to create new locations, new NotesLog subjects, and new choices in drop-down data fields, you probably do already have the necessary user-permissions to add new document types. If you need assistance with user-permissions or new document type creation, contact FileOnQ technical support at 800/603-6802, extension-4.

① On the FileOnQ menu bar, open **Data > Document Collection**



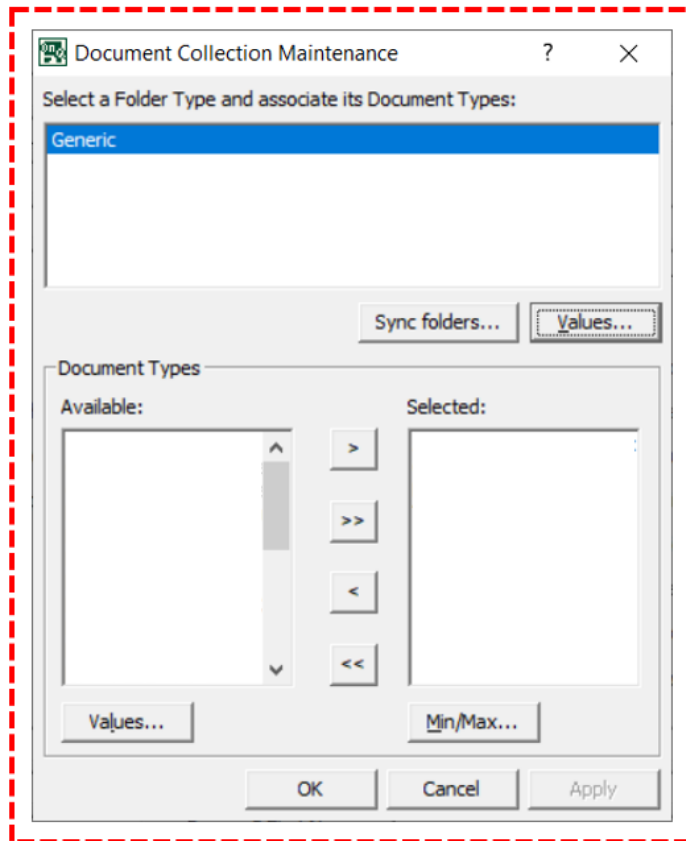
The following *simple-format* **Document Collection Maintenance** window should open. The document type ‘Generic’ appears in the window by default.



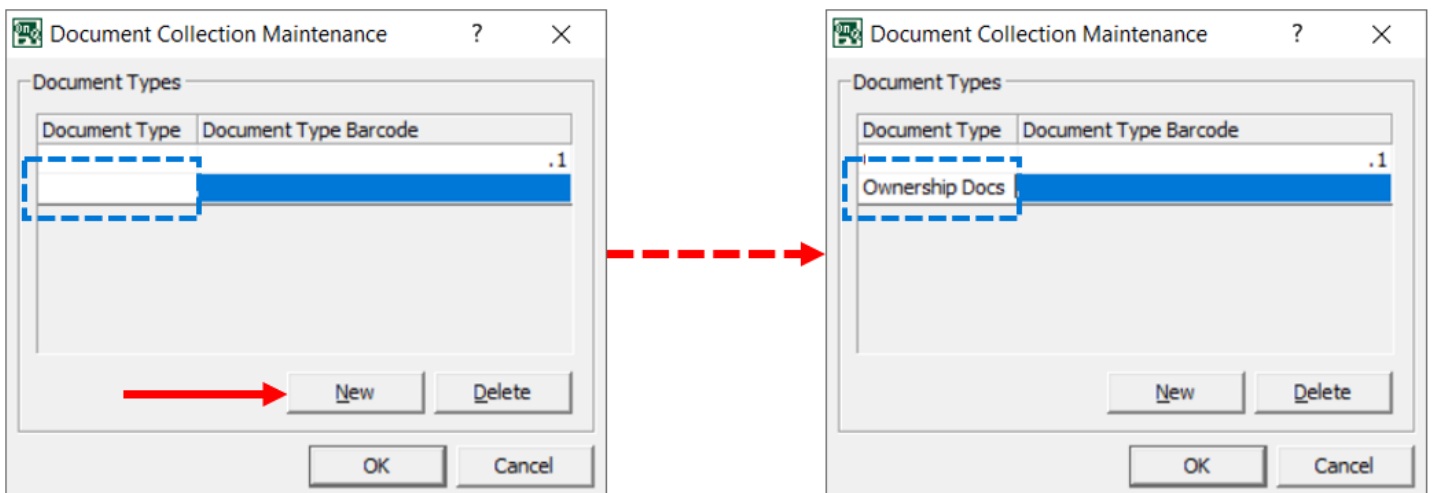
# FileOnQ eDocs

## Creating New Document Types

If the following *complex-format* **Document Collection Maintenance** widow opens, your FileOnQ system is not currently configured to utilize simple document types. Contact FileOnQ technical support to perform a simple backend setting change enabling the use of document types.

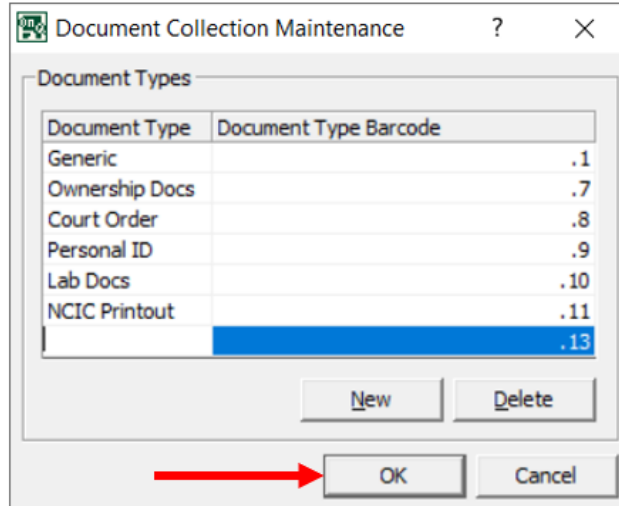


② In the **Document Collection Maintenance** window, click **New**. A new line and blank text field appears in the window. A cursor is active in the text field. Enter your new Document Type name in the text field.



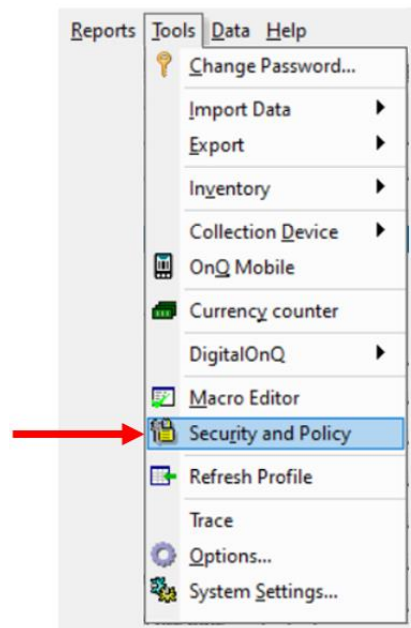
## FileOnQ eDocs Creating New Document Types

③ To create additional new document types, repeat step-2 ... click **NEW** and type new document type name into the blank text field. Repeat as needed. When finished, click **OK**. The Document Collection Maintenance window closes.



User access to VIEW, DOWNLOAD and UPLOAD eDocs files is controlled by user-group permission settings. Permissions for these three capabilities are set individually for each document type. After creating new types, all user-groups may be denied permission to access the new types – by default – until a FileOnQ administrator grants the necessary permissions. To check and set these permissions...

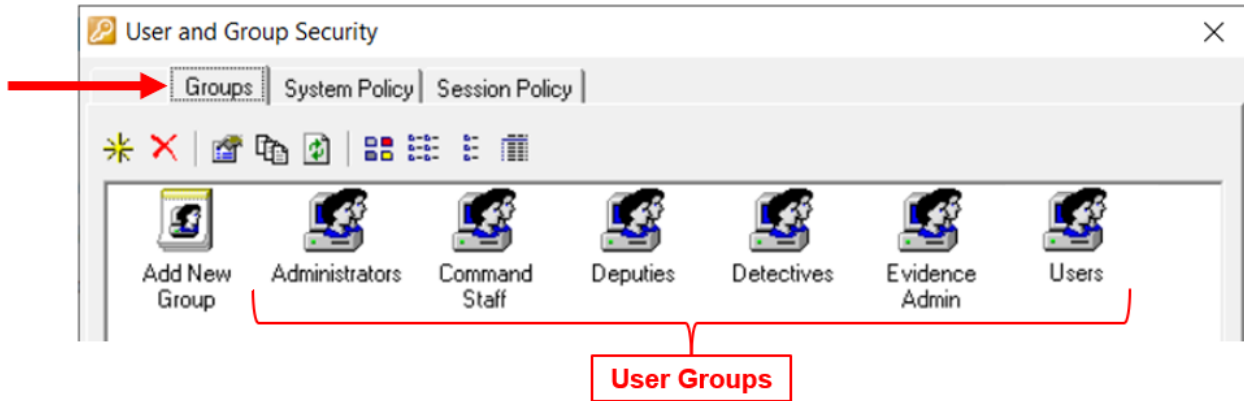
④ From the FileOnQ menu bar, open **Tools > Security and Policy**



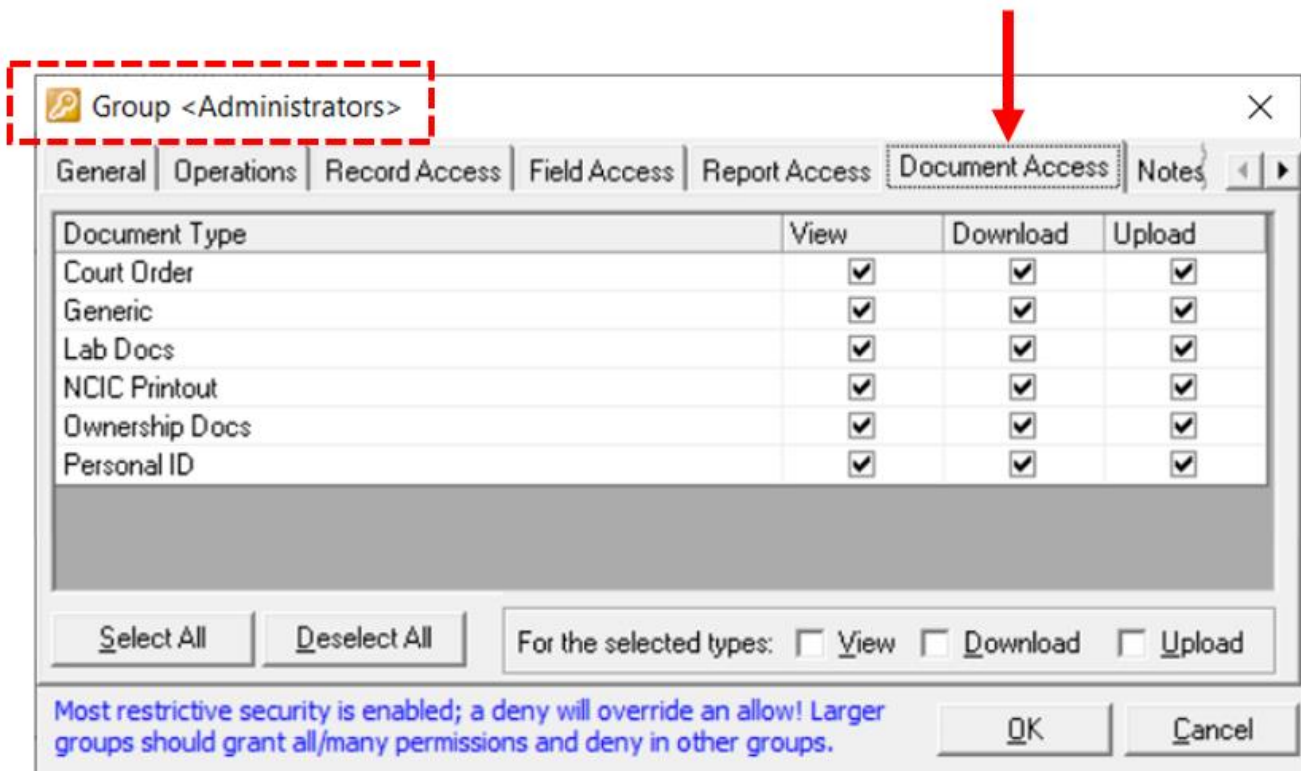
# FileOnQ eDocs

## Creating New Document Types

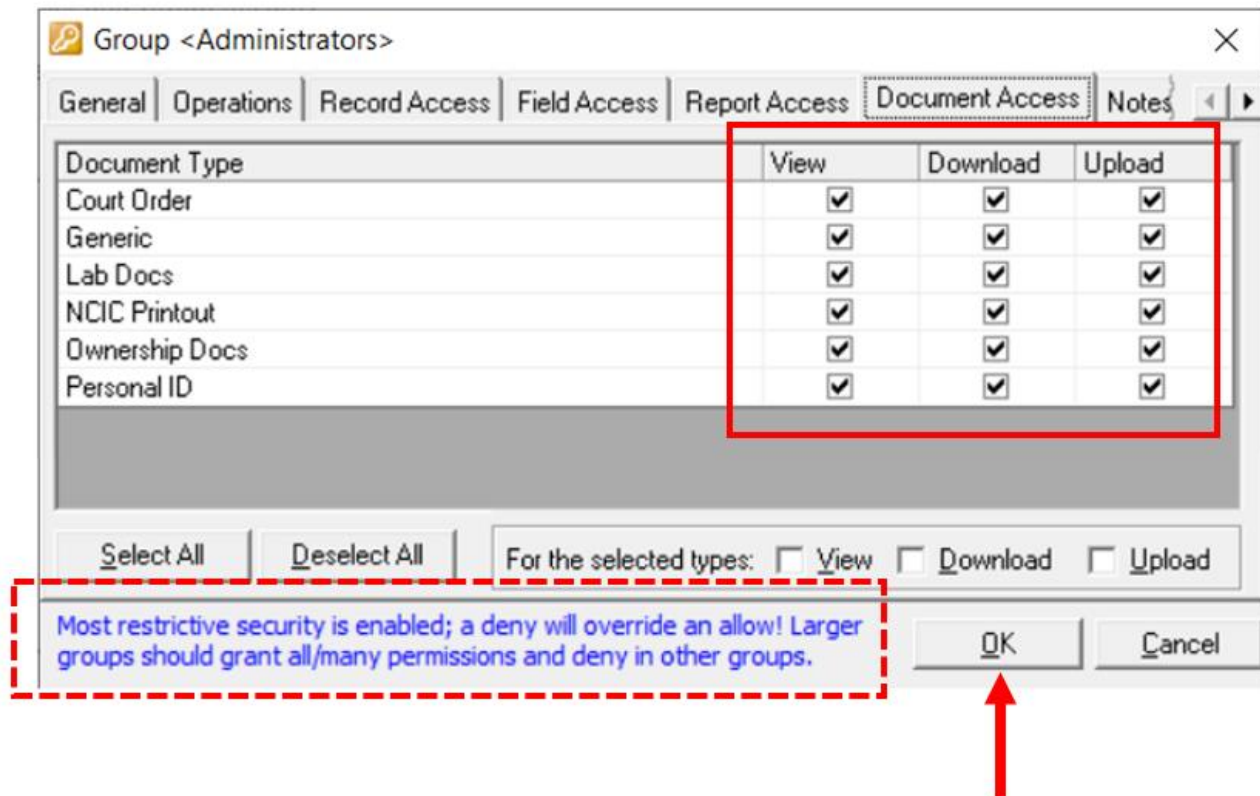
The **User and Group Security** window opens. Click the **Groups** tab to display the different user-groups established for your FileOnQ system.



⑤ Double-click on a user-group to open its permission settings. Click the **Document Access** tab to display access settings for each document type.



Note the applicable user-group name in the upper-left corner of the opened user-group window. The document access granted or denied to a user-group will apply to all members of the group.



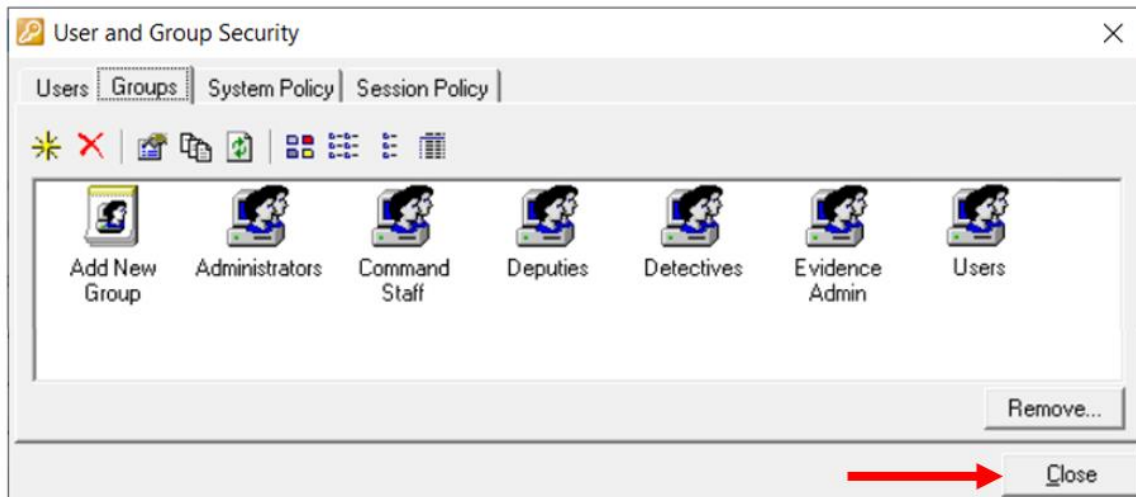
In the Document Type table, note the three columns governing **View**, **Download**, **Upload** permissions for each document type listed. A checkmark in the View column grants permission for the members of the selected user-group to **view** eDocs files of the specified type. An empty checkbox in the View column for a specified document type denies permission to the members of the selected user-group to **view** eDocs files of the specified type. The same permission-setting logic applies to the checkboxes in the Download and Upload columns for each document type. Click on an empty checkbox to apply a checkmark in the box or click on a marked box to remove an unwanted checkmark. When finished setting permissions for the selected user-group, click **OK**.

*Note the statement in blue text at the bottom of the Document Access window. In effect, this statement applies when a user is assigned to more than one user-group wherein View, Download, or Upload access is denied in one of the groups but is granted for the other group(s). In this circumstance, the deny-permissioned group will always overrule the grant-permissioned group, thus denying access to the specified document type for that user. In other words, if a user needs access to a given document type, the person cannot belong to any user-group where access to that document type has been denied, even if the person has membership in a different user-group where access permission to the specified document type has been granted. All persons who have a login ID and password to use the FileOnQ system are automatically added as members to the built-in group called 'Users. Most persons are then also added to a secondary user-group. Stay mindful of conflicting user-group permissions when applying document access settings.*

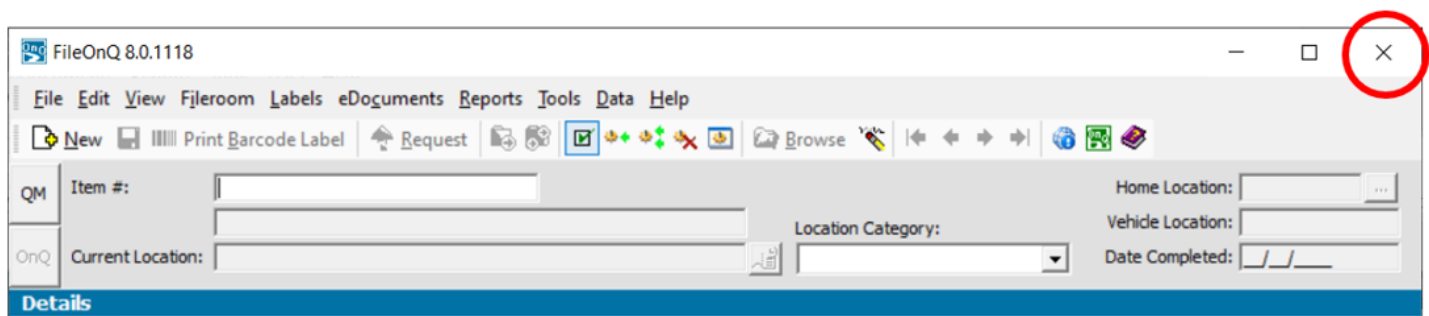
## FileOnQ eDocs Creating New Document Types

⑥ Repeat step-5 for each user-group.

⑦ When finished setting document access permissions for each user-group, click **CLOSE** in the User and Group Security window. The window closes.



⑧ Permission-setting changes are not formally applied in the FileOnQ system until the application is restarted. Log-out of the FileOnQ system by clicking the **X** button in the upper-right corner of the FileOnQ window.



⑨ Log-in to the system again to restart the application, thereby applying your recent setting changes.

*The newly added 'document types' should now be displayed and available when using the eDocs module.*