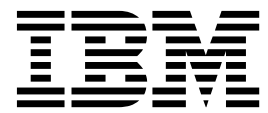


IBM TRIRIGA  
Version 10 Release 5

*Document Management  
User Guide*



**Note**

Before using this information and the product it supports, read the information in "Notices" on page 7.

This edition applies to version 10, release 5, modification 0 of IBM TRIRIGA and to all subsequent releases and modifications until otherwise indicated in new editions.

© **Copyright IBM Corporation 2011, 2015.**

US Government Users Restricted Rights – Use, duplication or disclosure restricted by GSA ADP Schedule Contract with IBM Corp.

---

## Contents

|  |          |   |          |
|--|----------|---|----------|
| <b>Chapter 1. Managing documents . . . . .</b>   | <b>1</b> | Workflows for document records . . . . .          | 6        |
| <b>Chapter 2. Document Manager . . . . .</b>     | <b>3</b> | <b>Notices . . . . .</b>                          | <b>7</b> |
| Publication records . . . . .                    | 3        | Trademarks . . . . .                              | 9        |
| Permissions to access document records . . . . . | 4        | Terms and conditions for product documentation .. | 9        |
| Permission levels . . . . .                      | 4        | IBM Online Privacy Statement . . . . .            | 10       |



---

## Chapter 1. Managing documents

IBM® TRIRIGA® Application Platform includes a Document Manager that enables applications to access documents and data files that are stored on the server. The Document Manager organizes documents and data files in a way that is similar to the file system on a personal computer.

The Document Manager facilitates you to complete the following tasks:

- Upload and download files
- Organize files into folders
- Manage access permissions for folders and files
- Retain all revisions of a file and organize them using revision numbers
- Combine specific revisions of individual documents into a collection that is called a publication

The Document Manager is used to manage and maintain documents throughout the application. Document sections exist in many business objects so that files can be associated with the business object for reference or historical purposes. The Document Manager can also be used as a stand-alone application to enforce version control and configuration management. Any type of file can be managed, including graphics, CAD, word-processing documents, and text files.

Documents, folders, and publications in TRIRIGA Application Platform are represented by using records that are created from business objects in the document module. Applications work directly with these business objects and records.

Do not modify the Document Manager objects as the business objects, such as publication and folder, include platform-specific functions.

You can access the Document Manager from the **Tools** menu.



---

## Chapter 2. Document Manager

You can manage and interactively work with all documents, folders, and publications that are contained in the TRIRIGA Application Platform.

The Document Manager facilitates you to complete the following tasks:

- Upload and download files
- Organize files into folders
- Manage access permissions for folders and files
- Retain all revisions of a file and organize them using revision numbers
- Combine specific revisions of individual documents into a collection that is called a publication

The Document Manager is used to manage and maintain documents throughout the application. Document sections exist in many business objects so that files can be associated with the business object for reference or historical purposes. The Document Manager can also be used as a stand-alone application to enforce version control and configuration management. Any type of file can be managed, including graphics, CAD, word-processing documents, and text files.

Documents, folders, and publications in TRIRIGA Application Platform are represented by using records that are created from business objects in the document module. Applications work directly with these business objects and records.

Do not modify the Document Manager objects as the business objects, such as publication and folder, include platform-specific functions.

You can access the Document Manager from the **Tools** menu.

---

### Publication records

A publication record is a collection of documents, other publications, or both. It can contain a single document or as many documents as necessary. Publication records are accessible from the Document Manager.

In addition to the standard create, cancel, save, and save and close actions, publication records have the following extra actions:

**Delete** Places the record in the delete queue.

**Restore**

Restores the retired record out of retirement. The restored record is not available on the active management list.

**Revise**

Reopens the retired or completed record for further editing. After you complete editing, the record must be published to restart the approval process.

**Final Delete**

Permanently removes the record from the delete queue. After you select **Final Delete**, the record cannot be retrieved.

## Undelete

Removes the record from the delete queue and returns it to the active management list.

---

## Permissions to access document records

Permissions are necessary to restrict access to publications, folders, documents, and the ROOT record. Before these permissions can be assigned, single users and groups must first be granted access rights to the Document Manager by their administrator.

Access rights to the Document Manager, or its business objects, does not mean that single users and groups have access to any or all folders in the Document Manager. The **Permissions** tab allows administrators to associate single users and groups to the record and give them certain permissions. Users can be granted permission to view, discuss, download, modify, create, retire, and delete publications, folders, documents, and the ROOT record. Users can also be granted full administrative control of these record types.

You can assign a single user to varying permissions, and many users to the same permissions, for a publication, folder, document, or the ROOT record. For example, if you have 20 users to whom you want to give read-only access to a specific document record, you can create a group and associate the individual records of the 20 users with the document record.

In the User Permissions section of the user record, or the Group Permissions section of the group record, click the **List** icon in the Permissions column and select the appropriate permission value.

Permissions for folders can be propagated down to the documents and folders that they contain. For example, if you give Admin (Full Access) permission to the individuals listed in the Group Permissions and User Permissions sections, you can give them Admin access to the documents and folders in that folder as well. You can indicate that permissions are not propagated at all, that they are propagated to apply only to the folders within the selected folder, or that they are propagated to apply to the folders and documents in the selected folder. The propagation goes as far down as the folders are nested.

## Permission levels

Permission levels are hierarchical. Where relevant, in addition to the permissions of the current level, each level also obtains the permissions of the preceding level.

The following table shows a list of permission levels for single users and groups for the different record types:

*Table 1. Permission levels for single users and groups*

| Permission | Record type               | Description   |
|------------|---------------------------|---|
| (blank)    | Document, Folder, or ROOT | The single user or group has no access to the document, folder, or ROOT record. |



Table 1. Permission levels for single users and groups (continued)

| Permission         | Record type    | Description  |
|--------------------|----------------|--|
| View Published     | Document       | Only after a document is included in a publication, and the publication is published, can the single user or group view the document.                            |
|                    | Folder or ROOT | The single user or group sees only documents and publications in the folder that are published. Documents that are not published are not included in the folder. |
| Discuss Published  | Document       | Only after a document is included in a publication, and the publication is published, can the single user or group discuss the document.                         |
|                    | Folder or ROOT | This permission level is the same as View Published.   |
| Download Published | Document       | Only after a document is included in a publication and the publication is published, can the single user, or group download the document's content as a file.    |
|                    | Folder or ROOT | This permission level is the same as View Published.   |
| View               | Document       | The single user or group can view a document, even if it is not published.   |
|                    | Folder         | The single user or group can see a listing of the folder's contents that includes all the documents and publications in the folder.                              |
|                    | ROOT           | The single user or group can see a listing of the ROOT's contents that includes all the documents and publications in the folder.                                |
| Discuss            | Document       | The single user or group can discuss the document, even if the document is not published.  |
|                    | Folder         | The single user or group can discuss the folder.   |
|                    | ROOT           | The single user or group can discuss the ROOT.   |

Table 1. Permission levels for single users and groups (continued)

| Permission           | Record type               | Description  |
|----------------------|---------------------------|--|
| Download             | Document                  | The single user or group can download the document's content as a file, even if the document is not published.                     |
|                      | Folder or ROOT            | This permission level is the same as Discuss.  |
| Modify               | Document                  | The single user or group can check out the file that is the document's content, modify the file and check the file back in.        |
|                      | Folder or ROOT            | This permission level is the same as Discuss.  |
| Create               | Document                  | This permission level is the same as Modify.   |
|                      | Folder or ROOT            | The single user or group can create new documents, folders and publications in the folder.   |
| Retire               | Document                  | The single user or group can retire the document after it is published.  |
|                      | Folder or ROOT            | This permission level is the same as Create.   |
| Delete Unpublished   | Document                  | The single user or group can delete the document before it is published.   |
|                      | Folder or ROOT            | This permission level is the same as Create. Published documents do not get deleted; instead they are retired to maintain history. |
| Admin (Full Control) | Document, Folder, or ROOT | The single user or group can perform all operations on the document or folder.   |

## Workflows for document records

Workflows are customizable business logic that is required by the system to run tasks. As you work with the Document Manager and its business objects, workflows run in order for the system to accomplish various document-related tasks. Workflows can be assessed only by the administrator.

When a workflow runs, it generates a workflow instance recording in the **Work Flow Instance** tab of the publication, folder, or document record. By clicking the text of the line item, you can open a view of the workflow in the **Tools > Builder Tools > Workflow Builder**. This view can be a useful tool for understanding why a workflow might fail.

Workflows can be synchronous or asynchronous. Synchronous workflows can run at the same time. Asynchronous workflows cannot run at the same time.

---

## Notices

This information was developed for products and services offered in the US. This material might be available from IBM in other languages. However, you may be required to own a copy of the product or product version in that language in order to access it.

IBM may not offer the products, services, or features discussed in this document in other countries. Consult your local IBM representative for information on the products and services currently available in your area. Any reference to an IBM product, program, or service is not intended to state or imply that only that IBM product, program, or service may be used. Any functionally equivalent product, program, or service that does not infringe any IBM intellectual property right may be used instead. However, it is the user's responsibility to evaluate and verify the operation of any non-IBM product, program, or service.

IBM may have patents or pending patent applications covering subject matter described in this document. The furnishing of this document does not grant you any license to these patents. You can send license inquiries, in writing, to:

*IBM Director of Licensing  
IBM Corporation  
North Castle Drive, MD-NC119  
Armonk, NY 10504-1785  
US*

For license inquiries regarding double-byte character set (DBCS) information, contact the IBM Intellectual Property Department in your country or send inquiries, in writing, to:

*Intellectual Property Licensing  
Legal and Intellectual Property Law  
IBM Japan Ltd.  
19-21, Nihonbashi-Hakozakicho, Chuo-ku  
Tokyo 103-8510, Japan*

INTERNATIONAL BUSINESS MACHINES CORPORATION PROVIDES THIS PUBLICATION "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF NON-INFRINGEMENT, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. Some jurisdictions do not allow disclaimer of express or implied warranties in certain transactions, therefore, this statement may not apply to you.

This information could include technical inaccuracies or typographical errors. Changes are periodically made to the information herein; these changes will be incorporated in new editions of the publication. IBM may make improvements and/or changes in the product(s) and/or the program(s) described in this publication at any time without notice.

Any references in this information to non-IBM websites are provided for convenience only and do not in any manner serve as an endorsement of those

websites. The materials at those websites are not part of the materials for this IBM product and use of those websites is at your own risk.

IBM may use or distribute any of the information you provide in any way it believes appropriate without incurring any obligation to you.

Licensees of this program who wish to have information about it for the purpose of enabling: (i) the exchange of information between independently created programs and other programs (including this one) and (ii) the mutual use of the information which has been exchanged, should contact:

*IBM Director of Licensing  
IBM Corporation  
North Castle Drive, MD-NC119  
Armonk, NY 10504-1785  
US*

Such information may be available, subject to appropriate terms and conditions, including in some cases, payment of a fee.

The licensed program described in this document and all licensed material available for it are provided by IBM under terms of the IBM Customer Agreement, IBM International Program License Agreement or any equivalent agreement between us.

The performance data and client examples cited are presented for illustrative purposes only. Actual performance results may vary depending on specific configurations and operating conditions.

Information concerning non-IBM products was obtained from the suppliers of those products, their published announcements or other publicly available sources. IBM has not tested those products and cannot confirm the accuracy of performance, compatibility or any other claims related to non-IBM products. Questions on the capabilities of non-IBM products should be addressed to the suppliers of those products.

Statements regarding IBM's future direction or intent are subject to change or withdrawal without notice, and represent goals and objectives only.

This information contains examples of data and reports used in daily business operations. To illustrate them as completely as possible, the examples include the names of individuals, companies, brands, and products. All of these names are fictitious and any similarity to actual people or business enterprises is entirely coincidental.

#### COPYRIGHT LICENSE:

This information contains sample application programs in source language, which illustrate programming techniques on various operating platforms. You may copy, modify, and distribute these sample programs in any form without payment to IBM, for the purposes of developing, using, marketing or distributing application programs conforming to the application programming interface for the operating platform for which the sample programs are written. These examples have not been thoroughly tested under all conditions. IBM, therefore, cannot guarantee or imply reliability, serviceability, or function of these programs. The sample

programs are provided "AS IS", without warranty of any kind. IBM shall not be liable for any damages arising out of your use of the sample programs.

Each copy or any portion of these sample programs or any derivative work must include a © (your company name) (year).

Portions of this code are derived from IBM Corp. Sample Programs.

© Copyright IBM Corp. \_enter the year or years\_.

---

## Trademarks

IBM, the IBM logo, and [ibm.com](http://ibm.com) are trademarks or registered trademarks of International Business Machines Corp., registered in many jurisdictions worldwide. Other product and service names might be trademarks of IBM or other companies. A current list of IBM trademarks is available on the web at "Copyright and trademark information" at [www.ibm.com/legal/copytrade.shtml](http://www.ibm.com/legal/copytrade.shtml).

Java™ and all Java-based trademarks and logos are trademarks or registered trademarks of Oracle and/or its affiliates.

Linux is a trademark of Linus Torvalds in the United States, other countries, or both.

Microsoft, Windows, Windows NT, and the Windows logo are trademarks of Microsoft Corporation in the United States, other countries, or both.

UNIX is a registered trademark of The Open Group in the United States and other countries.

Other product and service names might be trademarks of IBM or other companies.

---

## Terms and conditions for product documentation

Permissions for the use of these publications are granted subject to the following terms and conditions.

### Applicability

These terms and conditions are in addition to any terms of use for the IBM website.

### Personal use

You may reproduce these publications for your personal, noncommercial use provided that all proprietary notices are preserved. You may not distribute, display or make derivative work of these publications, or any portion thereof, without the express consent of IBM.

### Commercial use

You may reproduce, distribute and display these publications solely within your enterprise provided that all proprietary notices are preserved. You may not make derivative works of these publications, or reproduce, distribute or display these publications or any portion thereof outside your enterprise, without the express consent of IBM.

## Rights

Except as expressly granted in this permission, no other permissions, licenses or rights are granted, either express or implied, to the publications or any information, data, software or other intellectual property contained therein.

IBM reserves the right to withdraw the permissions granted herein whenever, in its discretion, the use of the publications is detrimental to its interest or, as determined by IBM, the above instructions are not being properly followed.

You may not download, export or re-export this information except in full compliance with all applicable laws and regulations, including all United States export laws and regulations.

IBM MAKES NO GUARANTEE ABOUT THE CONTENT OF THESE PUBLICATIONS. THE PUBLICATIONS ARE PROVIDED "AS-IS" AND WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO IMPLIED WARRANTIES OF MERCHANTABILITY, NON-INFRINGEMENT, AND FITNESS FOR A PARTICULAR PURPOSE.

---

## IBM Online Privacy Statement

IBM Software products, including software as a service solutions, ("Software Offerings") may use cookies or other technologies to collect product usage information, to help improve the end user experience, to tailor interactions with the end user, or for other purposes. In many cases no personally identifiable information is collected by the Software Offerings. Some of our Software Offerings can help enable you to collect personally identifiable information. If this Software Offering uses cookies to collect personally identifiable information, specific information about this offering's use of cookies is set forth below.

This Software Offering does not use cookies or other technologies to collect personally identifiable information.

If the configurations deployed for this Software Offering provide you as customer the ability to collect personally identifiable information from end users via cookies and other technologies, you should seek your own legal advice about any laws applicable to such data collection, including any requirements for notice and consent.

For more information about the use of various technologies, including cookies, for these purposes, see IBM's Privacy Policy at <http://www.ibm.com/privacy> and IBM's Online Privacy Statement at <http://www.ibm.com/privacy/details> in the section entitled "Cookies, Web Beacons and Other Technologies," and the "IBM Software Products and Software-as-a-Service Privacy Statement" at <http://www.ibm.com/software/info/product-privacy/>.





Printed in USA