



INTERFACE SETTINGS PROFILES

ADMINISTRATION TOOL

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WHAT IS AN INTERFACE SETTINGS PROFILE?

DEFINITION

An interface settings profile is a set of options allowing to customize GARGANTUA Web Client behavior **according to the user's category** (contrary to a display profile, that allows to customize the Web Client behavior **according to the folder and/or process type**).

What screen should be displayed right after the login? What behavior GARGANTUA Web Client should have after a document has been added? Should it be possible to create one-document pins? With interface settings profiles, you can set these options beforehand and assign them to users, groups and roles, according to their tasks and work habits.

EXAMPLE

A team is in charge of updating daily information about the company's customers. The users of this team belong to a group named "Update" and can access the "Customers" database. In the "Customers" database, each customer has a folder named after him (corporate name) with a form containing all the information to update. Each customer folder also contains documents, that sometimes need updating: deleting deprecated documents, creating new versions of existing documents...

To work efficiently, the team needs to:

1. Quickly access the suitable search tools in order to find the customer's folder;
2. See a global preview of the customer folder found;
3. Create one-document pins to be completed later.

To adapt GARGANTUA Web Client behavior to these tasks, the administrator creates an "Update" interface settings profile that he assigns to all the users of the "Update" group. In the "Update" interface settings profile, the administrator enables the following options:

1. **General options > Login/logout > Search with forms**: the search with forms screen will display right after the users log in. Indeed, most of the time, the user will search for a customer folder using the information contained in the corresponding form.
2. **Search > Results list > Folder display > Display using the folder view**: when a user clicks a folder in the search results list, he will be able to see the folder attributes, its subfolders, if any, the documents it contains, and a preview of the document selected in the list.
3. **Gargantua Explorer > Create pins > Allow pins to be created with one single component**: the user will be able to create pins to be completed later.

DIFFERENT TYPES OF INTERFACE SETTINGS PROFILES

WHAT IS THE “GUEST USER” PROFILE?

When installing GARGANTUA, an interface settings profile named **Guest user** is automatically created and assigned to the users who connect to the Web Client without providing any username or password.

It is possible to modify and rename this **Guest user** profile, and to assign another interface settings profile to guest users. Then, the original **Guest user** profile may be deleted.

The  icon displays next to the current guest user profile, whether it is the original **Guest user** profile or another one assigned later by the administrator.

WHAT IS THE “DEFAULT” PROFILE?

When installing GARGANTUA, an interface settings profile named **Default** is automatically created. This profile can then be assigned to newly created users and/or to those who do not have any specific profile (whether it is [standard](#) or [custom](#)).

It is possible to modify and rename the **Default** profile, and also to set another interface settings profile as default profile. Then, the original **Default** profile may be deleted.

The  icon displays next to the current default profile, whether it is the original **Default** profile or another one assigned later by the administrator.

WHAT IS A STANDARD OR SHARED PROFILE?

Standard or shared profiles are interface settings profiles set by administrators only, without any customization applied by the Web Client users.

The  icon displays next to them.

WHAT IS A “CUSTOM SETTINGS PROFILE”?

Custom settings profiles correspond to the choices made from the Web Client by some users who have been granted the **Settings customization** privilege. Every time a user modifies options of the default profile or the profile an administrator assigned to him, a custom settings profile with his name is created. The administrators can see, modify, and even delete this profile from the Administration Tool.

The  icon displays next to these profiles.

WHAT IS THE “EXTERNAL USERS DEFAULT PROFILE”?

This profile is applied to all newly created external users that do not have any [specific](#) profile.

Then, it is possible to change and rename the **External users default profile**, and also to define another interface settings profile as effective default profile; the original **External users default profile** can then be deleted.

The  icon displays next to this profile.

WHAT IS AN “EXTERNAL USER PROFILE”

External user profiles correspond to the choices made from the Web Client by external users: every time an external user modifies options of the default profile, an external user profile with the e-mail address of the external user is created and displayed under the **External user profile** branch. The administrators can see, modify, and even delete this profile from the Administration Tool.

An **external user profile** is specific, as external users are not displayed in the “classic” user list: thus, it is not possible to assign any external user profile through the **Users** branch.

The  icon displays next to these profiles.

HOW TO CREATE AN INTERFACE SETTINGS PROFILE?

To create a new interface settings profile, proceed as follows:

1. In the left pane of the Administration Tool, click the **Interface settings profiles** branch.

The **Manage interface settings profiles** screen displays in the right pane.

2. In the bottom left corner of the right pane, click the **New** button.

The new interface settings profile management screen displays.

3. In the **Identity** section, fill in the **Name** field and optionally the **Description** field.



Tip: choose a name that will remind you of the people you will assign this profile to (their activity, their post in the company, the department where they work, the user group(s) they belong to...). If you do so, later management and assignments will be easier.

4. In the **Options** section, define the [settings](#) of the new profile.
5. Click **Apply**.

The new interface settings profile has been created: you can now assign it to users and/or set it as the default profile and/or guest user profile.

INTERFACE SETTINGS PROFILES OPTIONS

HOW TO DECIDE WHICH OPTIONS SHOULD BE EDITABLE?

Even when users have been granted the **Settings customization** privilege, administrators can limit the scope of this privilege profile by profile, and then option by option.

To do so:

1. In the left pane of the Administration Tool, click the **Interface settings profiles** branch.

The **Manage interface settings profiles** screen displays in the right pane.

2. In the **Interface settings profiles list**, click the name of the profile for which you want to limit editable options.

The profile management screen displays.

3. Click the  button next to the  **Gargantua Explorer** section.

The list of options in this section displays.

4. On the right of the screen, clear the **All options are editable** checkbox.

All the checkboxes allowing to authorize or not options edition are cleared.

5. Check the checkboxes corresponding to the options for which you want to **authorize** edition.

6. Repeat steps 3 to 5 for the  **General options**,  **Inbox**,  **Search** and  **Document viewer** sections.

7. In the bottom left corner of the right pane, click **Apply**.

Your choices have been saved. Users with this profile and the **Settings customization** privilege will not be able to see or modify the options you have selected when accessing the **Customize interface** menu of the Web Client.



The “All option are editable” and other checkboxes are not available for the guest user profile. As a result, identified users who have this profile can customize all the options: the corresponding custom settings profiles display in the Administration Tool. Guest users do not have any privilege: they cannot customize anything.

GARGANTUA EXPLORER

ADD DOCUMENTS

BY DEFAULT SELECT PARENT FORM AND ATTRIBUTES

When the user clicks the  **Add new documents** tool in the Web Client toolbar, the new document form is pre-filled with the value of the parent folder attributes.

If this option is disabled, the new document form is empty and the user needs to fill manually all the attributes.

By default, this option is disabled.



When the Web Client user creates a new object, GARGANTUA usually selects the parent folder form by default. However, if the folder has a display profile, GARGANTUA selects the form set as the default form in this display profile. In this case, if the “By default select parent form and attributes” option is enabled, the default form in the display profile is still pre-filled with the values of the attributes it has in common with the parent folder form, if any.

ADD FOLDER

BY DEFAULT SELECT PARENT FORM AND ATTRIBUTES

When the user clicks the  **Creates a new folder** tool in the Web Client toolbar, the new folder form is pre-filled with the value of the parent folder attributes.

If this option is disabled, the new folder form is empty and the user needs to fill manually all the attributes.

By default, this option is disabled.



When the Web Client user creates a new object, GARGANTUA usually selects the parent folder form by default. However, if the folder has a display profile, GARGANTUA selects the form set as the default form in this display profile. In this case, if the “By default select parent form and attributes” option is enabled, the default form in the display profile is still pre-filled with the values of the attributes it has in common with the parent folder form, if any.

CREATE FOLDERS IN SEQUENCE

After adding a folder, GARGANTUA displays the folder's form again with empty attributes. The interface is then ready for the creation of another folder in the same parent folder.

If this option is disabled, GARGANTUA displays the **Back** link in the right pane, allowing you to go back to the content of the parent folder.

By default, this option is disabled.

CREATE PIN

ALLOW CREATION OF PINS WITH ONE SINGLE DOCUMENT

Allows the user to create pins with only one document.

By default, this option is disabled.

DATABASE SELECTION

DISPLAY THE DEFAULT VIEW

Display the GARGANTUA databases default view in the explorer in the **Gargantua database** drop-down list and in portals, if any.

If this option is disabled, the user only sees the custom views.

By default, this option is enabled.

DISPLAY “MY DOCUMENTS”

Display the **My documents** section, that includes favorites, latest documents, and validation cycle documents, in the content of a database.

If this option is disabled, then the **My documents** section will be hidden.



If this option is disabled but the user has no document (favorites, latest documents, etc.) in his My documents section, then this section will still be displayed.

By default, this option is enabled.

DOCUMENTS LIST

ALLOW THE BROWSER TO CACHE THUMBNAILS

If the **Thumbnails** display mode is enabled, this option allows the browser to save copies of the thumbnails in its cache memory the first time they are displayed. Therefore, the thumbnails display very quickly the following

times. This is particularly useful if there are many thumbnails to display.

On the downside, when a user modifies an image document, the browser does not immediately display the new version of the thumbnail because the former version is saved in the cache.

By default, this option is disabled.

REPORT COLUMNS FOR DOCUMENTS

DOCUMENT SIZE

Display the document size.

In **Report** display mode, the document size displays in the **Size** column.

By default, this option is enabled.

MODIFICATION DATE

Display the document last modification date.

In **Report** display mode the document modification date displays in the **Modification** column.

By default, this option is enabled.

CREATION DATE

Display the date the document was added in the GARGANTUA database.

In **Report** display mode, the document creation date displays in the **Creation** column.

By default, this option is enabled.

DOCUMENT TYPE

Display a written description of the document type.

In **Report** display mode the document type displays in the **Type** column.

By default, this option is enabled.

OPTIONAL COMMANDS ON THE DOCUMENT LIST

Display/hide less frequently used tools from the documents list toolbar (right pane).

DOCUMENT INFORMATION

Display the  **Document information** tool in the documents list toolbar.

This tool displays information such as the owner, the modification and creation dates, the version of the selected document.

By default, this option is enabled.

DOCUMENT ACTIVITY LOG

Display the  **Document activity log** tool in the documents list toolbar.

This tool displays the log list of operations for the document.

By default, this option is enabled.

STATUS ICONS TO DISPLAY IN “DETAILED LIST” MODE

In **Detailed list** display mode, in the  column, display or hide the following status icons:

CD ARCHIVED

Display the  icon when the document has been archived on a CD or DVD.

By default, this option is enabled.

CHECKOUT

Display the  or  icons when the document has been checked out. The  icon indicates that the current user has checked out the document to modify it and create a new version. The rest of the users see the  icon and cannot modify the document.

By default, this option is enabled.

LOCKED DOCUMENT

Display the  icon, which indicates that the document is locked. This means a user locked it to avoid the creation of new versions of the document.

By default, this option is enabled.

NOTES

Display the 📝 icon, which indicates that the document has at least one note.

By default, this option is enabled.

NOTIFICATIONS

Display the 🔔 icon, which indicates that the document is assigned to a notification.

By default, this option is enabled.

FORUM

Display the 💬 icon, which indicates that the document's forum contains messages.

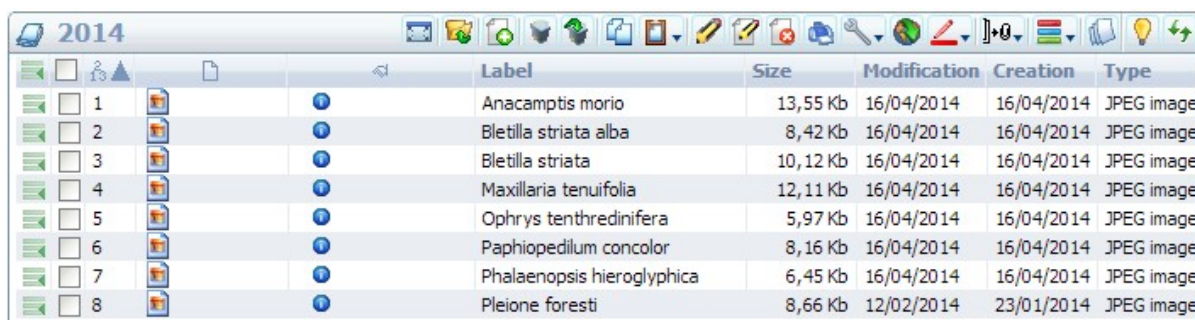
By default, this option is enabled.

DOCUMENT LIST DISPLAY MODE

Allows you to choose the display mode of the documents list in the GARGANTUA Explorer.

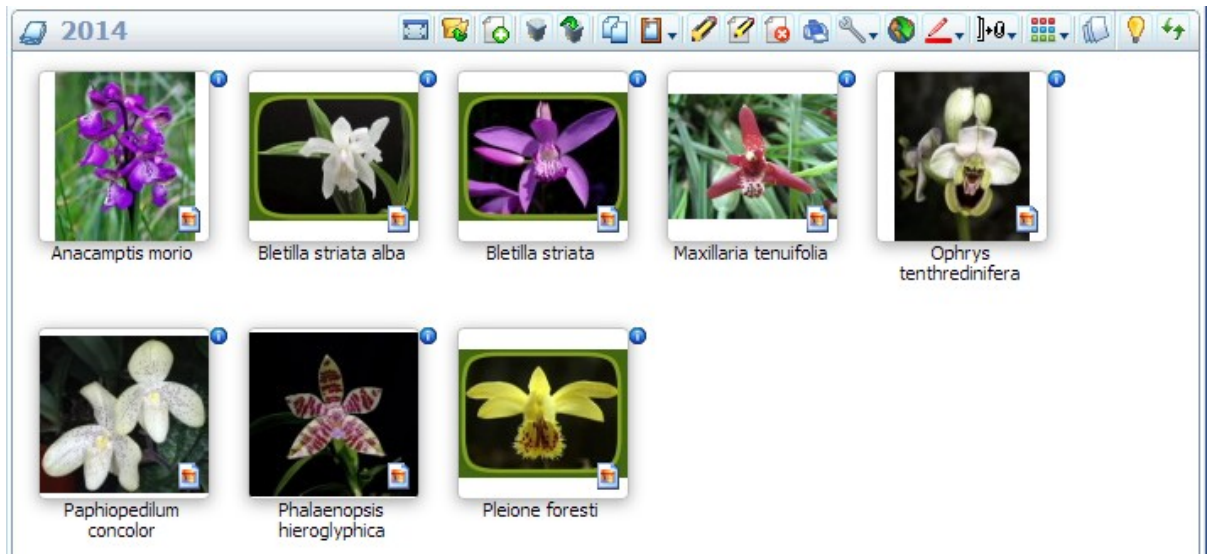
Three display modes are available:

-  **Detailed list:** Each line corresponds to an object. The information about the object is displayed on the line in different columns.

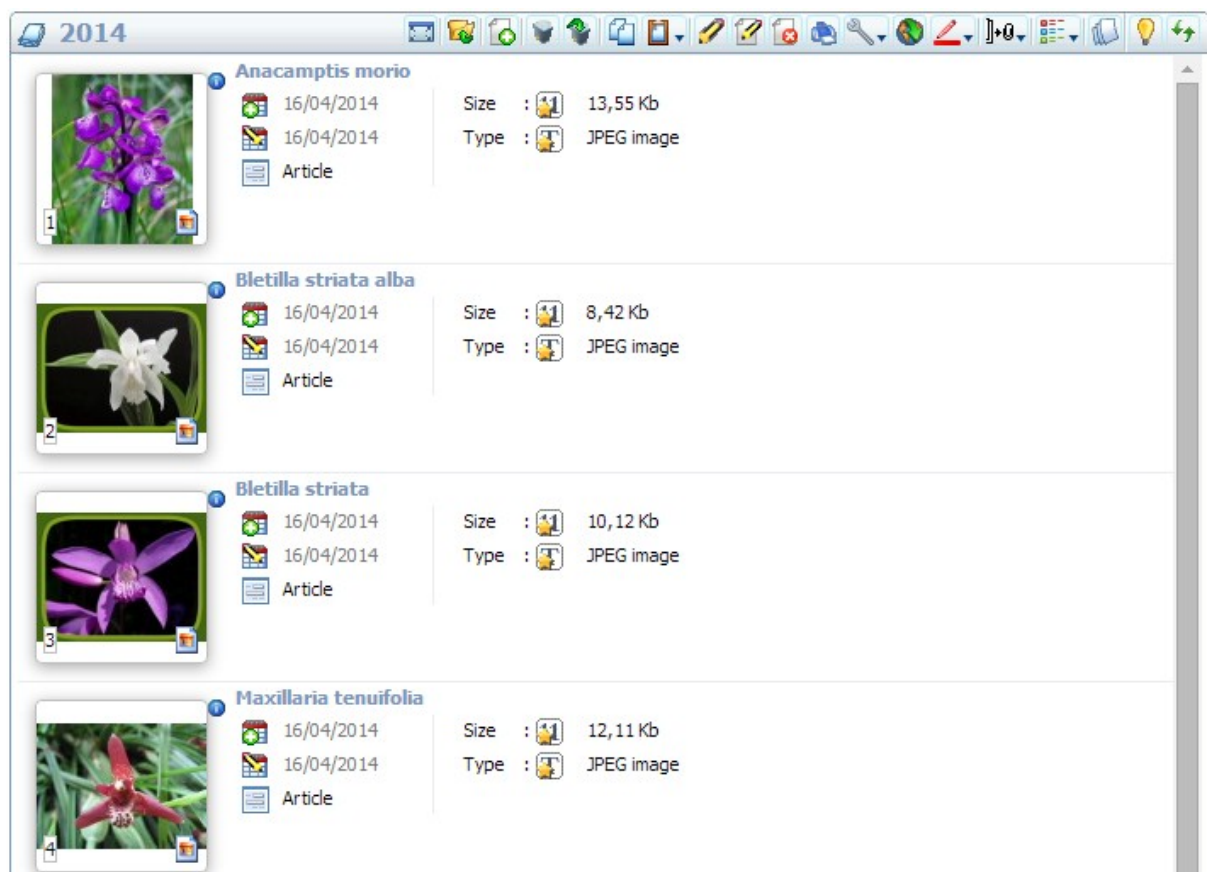


	Label	Size	Modification	Creation	Type
☐ 1	Anacamptis morio	13,55 Kb	16/04/2014	16/04/2014	JPEG image
☐ 2	Bletilla striata alba	8,42 Kb	16/04/2014	16/04/2014	JPEG image
☐ 3	Bletilla striata	10,12 Kb	16/04/2014	16/04/2014	JPEG image
☐ 4	Maxillaria tenuifolia	12,11 Kb	16/04/2014	16/04/2014	JPEG image
☐ 5	Ophrys tenthredinifera	5,97 Kb	16/04/2014	16/04/2014	JPEG image
☐ 6	Paphiopedilum concolor	8,16 Kb	16/04/2014	16/04/2014	JPEG image
☐ 7	Phalaenopsis hieroglyphica	6,45 Kb	16/04/2014	16/04/2014	JPEG image
☐ 8	Pleione foresti	8,66 Kb	12/02/2014	23/01/2014	JPEG image

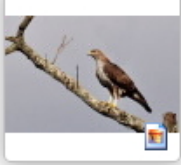
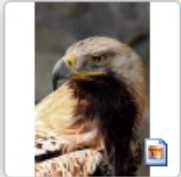
-  **Thumbnails:** Each object is represented by a thumbnail that previews when possible the corresponding file. The object flags are displayed on the right side of the thumbnail.



- **Thumbnails and details:** Each line corresponds to an object. A thumbnail, previewing when possible the corresponding file, and information about the object is displayed on the line.



-  **Custom mode:** The attribute values of your choice as well as the document thumbnail can be displayed on the line of the document. Use the **Customization** tab of any form to choose the elements you want to display.

5		Bonelli's eagle Aquila - Accipitriformes Accipitridae - LC - Least Concern	Birds
6		Eastern imperial eagle Aquila - Accipitriformes Accipitridae - VU - Vulnerable	Birds
7		Spanish imperial eagle Aquila - Accipitriformes Accipitridae - VU - Vulnerable	Birds

EDIT DOCUMENT ATTRIBUTES

MODIFY ATTRIBUTES FOR A SERIES OF DOCUMENTS

Allows you to:

- Apply the current form to a selection of documents;
- Apply the same attribute values to a selection of documents.

By default, this option is disabled.

AFTER MODIFYING ATTRIBUTES, DISPLAY THE DOCUMENT FORM INSTEAD OF THE DOCUMENTS LIST

When a user modifies the attributes of a document, and then saves the modifications, the form remains displayed.

If this option is disabled, GARGANTUA displays the **Back** link in the right pane in order to return to the documents list.

By default, this option is disabled.

DOCUMENT MODIFICATION AND VERSION MANAGEMENT

DISPLAY DOCUMENT LINKS (EXTERNAL, STREAMING, DOWNLOAD)

When the user clicks the  **Modify document** tool, in the modification interface GARGANTUA displays:

- The **document external URL** (direct access web address to the document, for authorized users). This allows for example pasting the URL in an email and sending the link to some users to inform them the document has been modified;
- The **streaming URL**;
- The **Create a temporary download link** section, that allows you to create and configure a temporary download link for the document, for instance if it is too heavy to be sent by mail.

By default, this option is disabled.

EDIT FOLDER ATTRIBUTE

AFTER MODIFYING ATTRIBUTES, DISPLAY THE FOLDER FORM INSTEAD OF THE DOCUMENTS LIST

After successful folder attributes modification, return to the form instead of displaying the documents list.

By default, this option is disabled.

FOLDER TREE

OPTIONAL COMMANDS ON THE FOLDER TREE

Display/hide less frequently used tools of the navigation tree toolbar (left pane).

FOLDER ACTIVITY LOG

Display the  **Folder activity log** tool in the navigation tree toolbar.

This tool displays the log list of operations for the selected folder.

By default, this option is enabled.

RECURSIVELY IMPORT A DISK FOLDER STRUCTURE

BY DEFAULT SELECT PARENT FORM AND ATTRIBUTES

When the user clicks the  **Recursively import a disk folder structure tool** in the Web Client toolbar, the form is pre-filled with the value of the parent folder attributes.

If this option is disabled, the form is empty and the user needs to fill manually all the attributes.

By default, this option is disabled.



When the Web Client user imports a folder structure, GARGANTUA usually selects the parent folder form by default. However, if the folder has a display profile, GARGANTUA selects the form set as the default form in this display profile. In this case, if the “By default select parent form and attributes” option is enabled, the default form in the display profile is still pre-filled with the values of the attributes it has in common with the parent folder form, if any.

NAVIGATION

RETURN TO THE EXPLORER (UNLESS AN ERROR OCCURS)

Return to the explorer (unless an error occurs) after the following operations:

ADD FOLDER

Display the explorer right after using the  **Add folder tool**.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the folder has been successfully added and a **Back** link to return to the explorer.

By default, this option is disabled.

MODIFY FOLDER ATTRIBUTES

Display the explorer right after using the  **Display attributes for the selected folder tool**, and then modified and saved the attributes of a folder.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the attributes have been successfully modified and a **Back** link to return to the explorer.

By default, this option is disabled.

DELETE FOLDER

Display the explorer right after using the  **Delete folder** tool.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the folder has been successfully deleted and a **Back** link to return to the explorer.

By default, this option is disabled.

FOLDER NOTE

Display the explorer right after using the  **Folder note** tool to add, modify or delete the folder note.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the note has been successfully saved and a **Back** link to return to the explorer.

By default, this option is disabled.

MOVE FOLDER TO OR RESTORE FROM ARCHIVE

Display the explorer right after using the  /  **Move to archive database/Move to active database** tool and confirming.

If this option is disabled, after this operation GARGANTUA displays a message informing the user that the operation has been successfully performed and a **Back** link to return to the explorer.

By default, this option is disabled.

ADD DOCUMENTS

Display the explorer right after using the  **Add document** tool.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the documents have been successfully added and a **Back** link to return to the explorer.

By default, this option is disabled.

MODIFY DOCUMENT ATTRIBUTES

Display the explorer right after using the  **Display attributes for the selected document** tool, and then modified and saved the attributes of a document.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the attributes have been successfully modified and a **Back** link to return to the explorer.

By default, this option is disabled.

DELETE DOCUMENTS

Display the explorer right after using the  **Delete document** tool and confirming.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the documents have been successfully deleted and a **Back** link to return to the explorer.

By default, this option is disabled.

PIN DOCUMENTS

Display the explorer right after using the  **Pin documents** tool.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the documents have been successfully pinned and a **Back** link to return to the explorer.

By default, this option is disabled.

UNPIN DOCUMENTS

Display the explorer right after using the  **Unpin documents** tool.

If this option is disabled, after this operation GARGANTUA displays a message informing the user the documents have been successfully unpinned and a **Back** link to return to the explorer.

By default, this option is disabled.

DOCUMENT SECURITY

Display the explorer right after using the  **Access rights** tool.

If this option is disabled, after this operation GARGANTUA displays a message informing the user that the access rights have been successfully modified and a **Back** link to return to the explorer.

By default, this option is disabled.

MOVE DOCUMENT TO OR RESTORE FROM ARCHIVE

Display the explorer right after using the  /  **Move to archive database/Move to active database** tool and confirming.

If this option is disabled, after this operation GARGANTUA displays a message informing the user that the

operation has been successfully performed and a **Back** link to return to the explorer.

By default, this option is disabled.

DATABASE SECURITY

DISPLAY ACCESS RIGHTS

Display the access rights when the user clicks the  **Access rights** tool.

If this option is disabled, after this operation GARGANTUA displays the interface allowing the user to select a security profile for the selected object.

By default, this option is disabled.

DOCUMENT VIEWER

DISPLAY DOCUMENT AND ITS ATTRIBUTES

Displays the document on the right and its attributes on the left when the user clicks a document name in the explorer.

If this option is disabled, only the document displays on the right.

By default, this option is disabled.

DISPLAY DOCUMENT AND ITS NOTES

Displays the document and its notes, if any, when the user clicks a document name in the explorer.

If this option is disabled only the document displays on the right. Notes can be displayed using the  **Notes** tool.

By default, this option is enabled.

AUTOMATICALLY SAVE ATTRIBUTES

Automatically saves attributes modifications without clicking the **Save** command, when the user switches to another object form with the  arrows.

By default, this option is enabled.

GENERAL OPTIONS

ADD DOCUMENTS

USE AN ACTIVEX COMPONENT FOR UPLOADING FILES

Use the ActiveX plugin to add documents instead of the default interface.

This plugin integrates advanced features allowing to:

- Add documents by scanning with scanner settings modification;
- Access directly GARGANTUA mail inbox to add attached documents;
- Use imaging tools to modify image documents before adding them: detouring, rotate, clean;
- Use additional document tools: delete, scan again, validate...

By default, this option is disabled.

WHEN TRANSFER IS COMPLETE, GO BACK TO THE DOCUMENTS LIST

Using the [ActiveX add documents plugin](#), display the documents list right after adding documents.

If this option is disabled, after adding documents the add documents ActiveX interface remains displayed in order to add more documents.

Using the default add documents interface, the documents list always displays after adding documents.

By default, this option is disabled.

AUTOMATICALLY START SCANNING DOCUMENTS

Using the [ActiveX add documents plugin](#), when the user clicks **Scan**, directly start scanning with the default scanner settings.

If this option is disabled, the scanner settings options window displays in order to allow for the modification of options before starting to scan.

This option allows you to save time if you use the same settings most of the time.

By default, this option is disabled.

AFTER DOCUMENTS ARE SCANNED, AUTOMATICALLY TRANSFER FILES

Using the [ActiveX add documents plugin](#), when the documents are scanned, directly add them to the GARGANTUA database, without controlling, retouching, nor clicking the **Validate** command.

If this option is disabled, the scanned documents display as thumbnails, allowing the user to control and enhance the images with the imaging tools, delete the documents which are not properly scanned, scan again... before validating and adding them to the GARGANTUA database.

By default, this option is disabled.

START PASTING FILES COPIED FROM THE COMPUTER DIRECTLY

When files are copied from a computer, and then pasted in GARGANTUA Web Client using the **Paste** command, the **Paste files copied from the computer** frame displays.

If this option is enabled, the copied files import operation starts directly after clicking the **Import** button.

If this option is disabled, it is necessary to click a second time the **Import** button, and to click again each time the clipboard content is refreshed to make the import operation start.

This option is enabled by default.

FORUM

SEND AN E-MAIL TO THE OBJECT'S OWNER WHEN A COMMENT IS ADDED TO ITS FORUM

Enable e-mail notifications to the owner of the object when a comment is added to the object's forum.

By default, this option is disabled.

INTERNATIONALIZATION

DISPLAYS ALL DATES IN HIJRI CALENDAR

Display all the dates in GARGANTUA Web Client using the Hijri calendar (muslim calendar).

By default, this option is disabled.

DISPLAY ALL DATES USING THE ARABIC-INDIC NUMERALS

Display all the dates in GARGANTUA Web Client using the Arabic-Indic numerals.

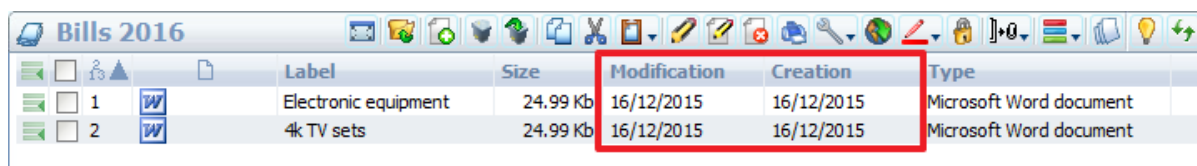
By default, this option is disabled.

DISPLAY AND LAYOUT

DATES FORMAT

EXACT FORMAT (E.G. 15/08/2016)

If this option is enabled, dates will display with exact format (for example, “08/15/2016”):

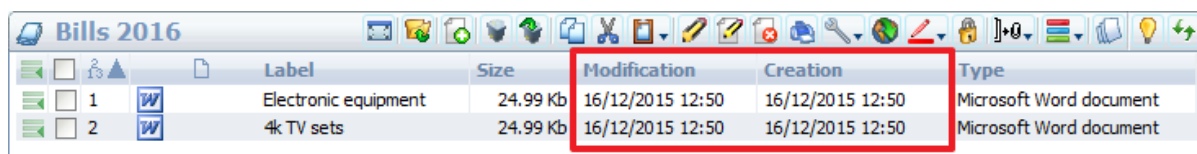


	Label	Size	Modification	Creation	Type
1	Electronic equipment	24.99 Kb	16/12/2015	16/12/2015	Microsoft Word document
2	4k TV sets	24.99 Kb	16/12/2015	16/12/2015	Microsoft Word document

This option is enabled by default.

EXACT WITH HOUR FORMAT (E.G. 15/08/2016, 18:00)

If this option is enabled, dates will display with exact hour format (for example, “08/15/2016”, 18:00):



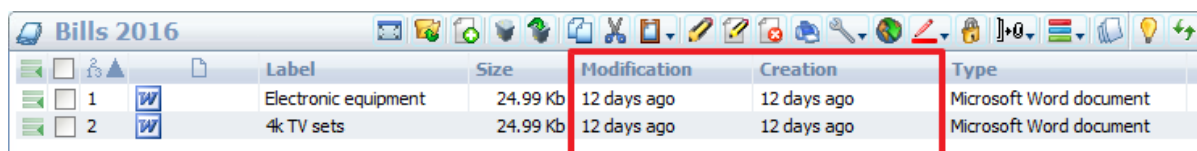
	Label	Size	Modification	Creation	Type
1	Electronic equipment	24.99 Kb	16/12/2015 12:50	16/12/2015 12:50	Microsoft Word document
2	4k TV sets	24.99 Kb	16/12/2015 12:50	16/12/2015 12:50	Microsoft Word document

This option is disabled by default.

SEE DATES IN FUZZY FORMAT (E.G. “5 MINUTES AGO”)

If this option is disabled, dates will display in exact format (e.g. “05/11/2016 15:54”).

If this option is enabled, dates will display in fuzzy format (e.g. “5 minutes ago”):



	Label	Size	Modification	Creation	Type
1	Electronic equipment	24.99 Kb	12 days ago	12 days ago	Microsoft Word document
2	4k TV sets	24.99 Kb	12 days ago	12 days ago	Microsoft Word document

This option apply on all dates displayed in GARGANTUA Web Client, except for the **Tasks** tab (see [See dates in fuzzy format](#) in the **Inbox** section).

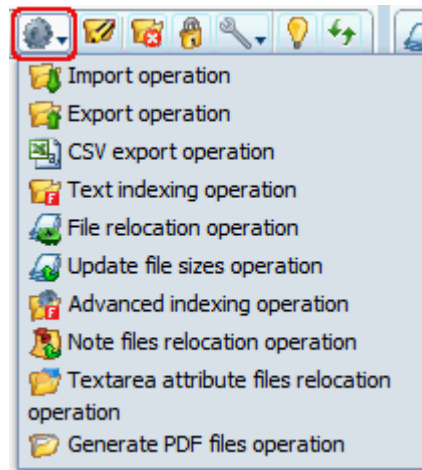
This option is disabled by default.

USE COMPACT TOOLBARS

Gather some features of the navigation tree and documents list toolbars into a drop-down menu. This allows to reduce the toolbars size, therefore the GARGANTUA window size. The following features can be compacted.

In the navigation tree toolbar:

- Delayed operations:

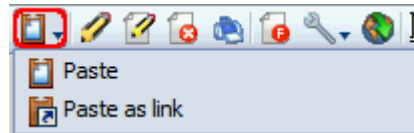


- Management operations related to folder structure and information display:

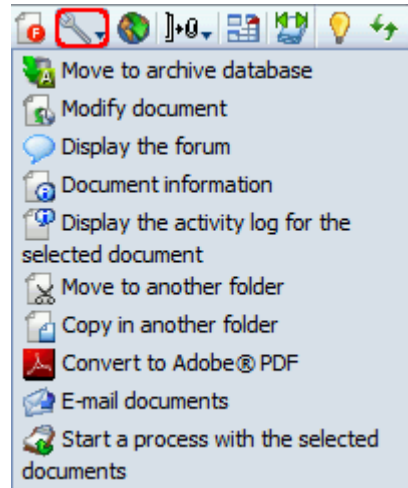


In the documents list toolbar:

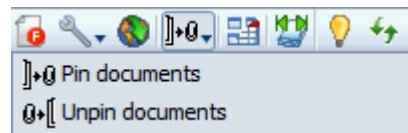
- Paste operations:



- Management operations related to transfers, modifications and information display:



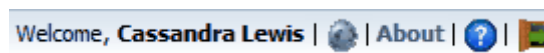
- Pin and unpin operations:



By default, this option is enabled.

ACTIVATE LAYOUT OPTIMIZATION FOR RESOLUTION 1024*768

Replace the links of the menu located in the upper right corner of the Web Client (**Settings, Help, Logout**) by icons, to save space on small screens:



By default, this option is enabled.

LOGIN / LOGOUT

AFTER LOGIN DISPLAY:

Indicate which GARGANTUA feature should display after the user logs in: **Portal** (default), **Inbox / waiting box** (workflow), **Explorer**, **General search**, **Advanced search**, **Full-text search**, **Process manager**.

This provides direct access to the most frequently used functions, and allows users to check some information each time they connect (check workflow tasks in the inbox, for example).

COMMAND MENUS

ALLOW POPUP MENUS ON RIGHT-CLICK

Activate the contextual menus that display when you right-click on objects (folders, documents...). Contextual menus contain the same tools as the toolbars, depending on the right-clicked object.

By default, this option is enabled.

NOTIFICATIONS

SEND NOTIFICATIONS BY EMAIL

Notifications related to documents and folders will be e-mailed to the users affected by those notifications. Check the sending frequency below: daily, weekly, immediately.

By default, this option is enabled.

SHOW IN PORTAL

Allows to display user notifications in a portal. The portal must at least include an area whose content is **Notifications**.

If this option is disabled, then the error message **Notifications are disabled** will be displayed in the portal area.

By default, this option is enabled.

PLUGINS

DISPLAY NOTIFICATION WHEN A BROWSER PLUGIN UPDATE IS AVAILABLE

If this option is enabled, a message displays when a document is viewed or uploaded in GARGANTUA Web Client using a browser plugin, and when a new version of the browser plugins is available. This message keeps displaying until the browser plugins are updated.

By default, this option is enabled.

TIP OF THE DAY

TIP OF THE DAY

Display the tip of the day about the selected topics: **Add document, Create folder, Document list...**

The tip of the day is a short text meant to help the user. It displays on the top of GARGANTUA modules frames.

By default, all the tip of the day topics are enabled.

INBOX

ALERTS

PLAY A SOUND WHEN A NEW TASK ARRIVES

Check this checkbox if you want GARGANTUA to play a sound each time that you receive a new task in your **Inbox**.

This option is enabled by default.

WAITING BOX

GO BACK TO INBOX WHEN REACTIVATING A POSTPONED TASK

In the waiting box (Workflow), if the user clicks the  tool to send a task to the inbox, GARGANTUA automatically opens the inbox and displays the task.

If this option is disabled, the waiting box remains displayed.

By default, this option is enabled.

DISPLAY AND LAYOUT

DISPLAY SEARCH FILTER BY DEFAULT

When this option is enabled, a **search filter** is displayed in a user's inbox. The task that will be displayed in the inbox will only match the value entered in the search filter.

For example, if you enter the value "digitization" in the search filter, then only the tasks whose name contain the word "digitization" will be displayed: "mail digitization", "invoice digitization", etc.

This option is disabled by default.

DISPLAY DATES IN FUZZY FORMAT (E.G. 5 MINUTES AGO)

See the dates in fuzzy format (e.g. "5 minutes ago").

Uncheck this box if you want to see the dates in exact format (e.g. "14/04/2014 19:31").

This option applies only to dates displayed in the **Tasks** tab (see [Display dates in fuzzy format](#) in the **General options** section).

This option is enabled by default.

NAVIGATION

RETURN TO INBOX (UNLESS AN ERROR OCCURS) AFTER:

Allows to return directly to inbox (unless an error occurs) after **Editing a process** (check the checkbox below).

This option is disabled by default.

SEARCH

DOCUMENT ATTRIBUTE EDIT

MODIFY ATTRIBUTES FOR A SERIES OF DOCUMENTS

Allow the selection of several documents in a search result to modify their attributes. Once the user has displayed the attributes of the selection first document, the **Save this form for all documents** checkbox on the top of the form allows to apply the modifications to all the selected documents.

By default, this option is disabled.

AFTER MODIFYING ATTRIBUTES, DISPLAY THE DOCUMENT FORM INSTEAD OF THE DOCUMENTS LIST

In a search result, when the user modifies and saves a document's attributes, this option allows to keep the document's form displayed.

If this option is disabled, after saving a document's attributes GARGANTUA displays the **Back** link to return to search tools.

By default this option is disabled.

FOLDER ATTRIBUTE EDIT

AFTER MODIFYING ATTRIBUTES, DISPLAY THE FOLDER FORM INSTEAD OF THE DOCUMENTS LIST

In a search result, when the user modifies and saves a folder's attributes, this option allows to keep the folder form displayed.

If this option is disabled, after saving a folder's attributes GARGANTUA displays the **Back** link to go back to search tools.

By default this option is disabled.

POSITION IN FOLDER TREE OR INBOX

ASK FOR CONFIRMATION WHEN POSITIONING INTO THE TREE OR INBOX

In a search result, when a user clicks the  **Position into tree or inbox tool**, this option allows to display a confirmation message before leaving the search interface.

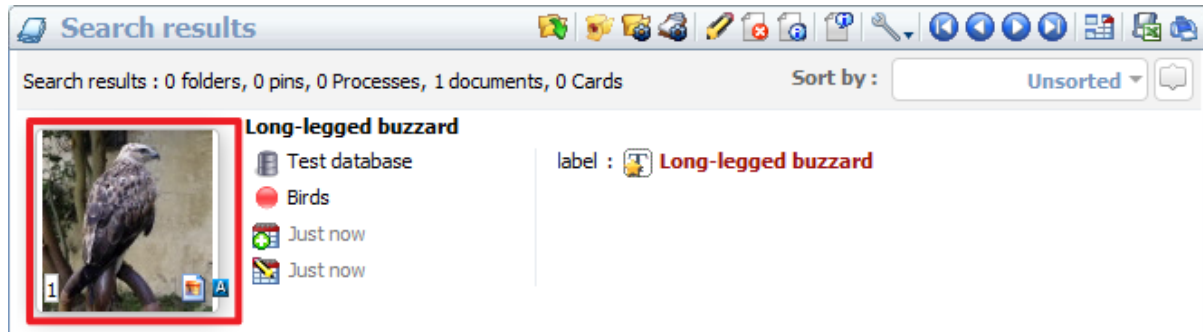
If this option is disabled, GARGANTUA does not display the confirmation message before leaving the search interface.

By default, this option is enabled.

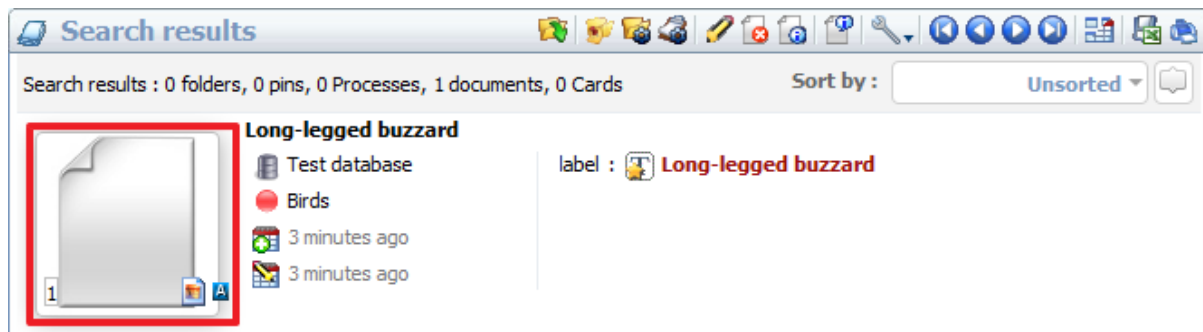
RESULTS LIST

GENERATE THUMBNAILS FOR SEARCH RESULTS

Checking this checkbox allows to display a thumbnail for search results:



If you do not check this checkbox, the thumbnail will not be displayed:



REPORT COLUMNS

In a search result: information to display for each object.

- In **Detailed list mode**, each piece of information is displayed in a particular column.
- In **Thumbnails mode**, each piece of information is displayed on the right side of the thumbnail for each object.
- In **Detailed thumbnails mode**, each piece of information is displayed in the same line, on the right side of the thumbnail.
- In **Custom display mode**, each piece of information (and optionally a thumbnail) about the document are displayed the way you defined it in the **Customization** tab of the document form.

DOCUMENT PROPERTIES

Display the  icon indicating the object has a form which is different from the default form.

In **Report** display mode the icons display in the  column.

By default, this option is enabled.

DOCUMENT SIZE

Display document size.

In **Report** display mode, the document size displays in the **Size** column.

By default, this option is enabled.

MODIFICATION DATE

Display the objects last modification date.

In **Report** display mode, the objects size displays in the **Modification** column.

By default, this option is enabled.

CREATION DATE

Display the objects creation date.

In **Report** display mode, the objects creation date displays in the **Creation** column.

By default, this option is enabled.

DOCUMENT TYPE

Display the objects type description (folder, pin...). For documents, the document type is specified as text.

In **Report** display mode, the objects type description displays in the **Type** column.

By default, this option is enabled.

GARGANTUA DATABASE

Display the name of the GARGANTUA database where the object is stored. This may prove useful for multi-database searches.

By default, this option is enable.

OPTIONAL COMMANDS

Display/hide the less frequently used tools in the results list toolbar.

OBJECT INFORMATION

Display the  **Document information** tool in the results list toolbar. This tool displays information such as the object owner, modification and creation dates, version...

By default, this option is enabled.

OBJECT ACTIVITY LOG

Display the  **Activity log** tool in the results list toolbar. This tool displays the operations performed on the selected object.

By default, this option is enabled.

FOLDER DISPLAY

Folders display mode from a search result.

DISPLAY USING THE FOLDER VIEW

In a search result, when a user clicks on a folder's name GARGANTUA displays the "folder display" interface.

The folder display allows to see: the folder's structure (subfolders, if any), documents (if any), attributes, and an overview of the first document it contains (the other documents can also be displayed in the same frame).

By default, this option is disabled.

DISPLAY USING THE DOCUMENT VIEW (FIRST DOCUMENT OR ATTRIBUTES)

In a search result, when a user clicks a folder name, GARGANTUA displays either its attributes or its first document, according to the option enabled in **Document viewer > Folder and process display : Display attributes** or **Display first document** (see [Folder and process display](#)).

By default, this option is enabled.

PROCESS DISPLAY

Process display mode from a search result.

DISPLAY USING THE PROCESS VIEW

In a search result, when a user clicks on a process name, GARGANTUA displays the **Process display** interface.

The process display allows to see: the process structure (folders, if any), documents (if any), attributes, and an overview of the first document it contains (the other documents can also be displayed in the same frame).

By default, this option is disabled.

DISPLAY USING THE DOCUMENT VIEW (FIRST DOCUMENT OR ATTRIBUTES)

In a search result, when a user clicks a process name, GARGANTUA displays either its attributes or its first document, according to the option enabled in **Document viewer > Folder and process display : Display attributes** or **Display first document** (see [Folder and process display](#)).

By default, this option is enabled.

SEARCH WITH FORMS

ONLY DISPLAY SEARCH WITH FORMS

Displays only the **Search with form** search tool. The other search tools (general search, full-text search, search templates) are hidden.

This option is meant to avoid errors when users must only use searches with forms.

By default, this option is disabled.

DOCUMENT VIEWER

DISPLAY DOCUMENT AND ITS ATTRIBUTES

In a search result, when a user clicks a document name, GARGANTUA displays the document on the right with its attributes on the left.

If this option is disabled, only the document displays on the right.

By default, this option is disabled.

DISPLAY DOCUMENT AND ITS NOTES

In a search result, when a user clicks a document name, GARGANTUA displays the document with its notes, if any.

If this option is disabled, the document displays without the notes. You can display notes anytime using the  **Notes** tool.

By default, this option is enabled.

AUTO-SAVE ATTRIBUTES

In a search result, when a user modifies an object's attributes, and switches to next object's form with the  arrows, this option allows to automatically save the modifications without clicking the **Save** button.

By default, this option is enabled.

DOCUMENT VIEWER

DOCUMENT DISPLAY MODE

This option allows to set the default display mode for documents in GARGANTUA Web Client. Users will still be able to switch from a display mode to another with the following tools: **Display in HTML mode** , **Display using the ActiveX component**  or **Display in PDF mode** .

The following display modes are available:

- **HTML:** This mode offers a limited toolbar. It is always available, independently of the user's rights. No browser plugin needs to be installed, and no specific setting is required.
- **PDF:** This mode gives access to an unmodifiable version of the documents and a specific PDF toolbar. It is only available if the **Enable PDF conversion** option is enabled on the document's GARGANTUA database.
- **ActiveX:** ActiveX mode offers a second toolbar including image files editing tools. It requires the browser plugins to be installed.

By default, the PDF display mode is used. If PDF or ActiveX modes are unavailable, HTML mode will be used.

FOLDER AND PROCESS DISPLAY

What should display when a user clicks the name of a folder or process.

DISPLAY ATTRIBUTES

Displays folder or process attributes in the right pane.

By default, this option is enabled.

DISPLAY FIRST DOCUMENT

Displays the first document of the folder or process, if any, in the right pane.

By default, this option is disabled.

PIN DISPLAY

What should display when a user clicks the name of a pin.

DISPLAY ATTRIBUTES

Displays the pin's attributes in the right pane.

By default, this option is disabled.

DISPLAY FIRST DOCUMENT

Displays the pin's first document in the right pane.

By default, this option is enabled.

MANAGING INTERFACE SETTINGS PROFILES

ASSIGNING AN INTERFACE SETTINGS PROFILE TO A USER

To assign an interface settings profile to a user, proceed as follows:

1. In the left pane of the Administration Tool, click the **Users** branch.
The **Manage users** screen displays in the right pane.
2. In the **Users list**, click the name of the user you want to assign an interface settings profile to.
The **Manage user** screen displays in the right pane.
3. In the **Profile** drop-down list, select the interface settings profile you want to assign to the user.



Only the generic profiles (shared profiles, default profile, and guest user profile) and the current user own custom settings profile, if any, display in the drop-down list. Indeed, the custom settings profile of a user cannot be assigned to another user.

4. At the bottom of the right pane, click **Apply**.
5. If you want to access directly the profile management screen, click the  icon next to the **Profile** field.



If you have checked the “Use the compact display for users, roles and groups managers” in the “Manage server” screen, the “Users” branch does not display in the left pane. In this case, to assign an interface settings profile to a user, click the “Users, groups, roles” branch. In the management screen (right pane), select the user of your choice in the “Name” field, and click the “Change profile” button in the bottom right corner of the screen.

ASSIGNING AN INTERFACE SETTINGS PROFILE TO A GROUP

To assign an interface settings profile to all the members of a group, proceed as follows:

1. In the left pane of the Administration Tool, click the **Groups** branch.
The **Manage groups** screen displays in the right pane.
2. In the **Groups list**, click the name of the group you want to assign an interface settings profile to.
The **Manage group** screen displays in the right pane.
3. At the bottom of the right pane, click the **Change profile** button.
The **Change profile** dialog displays.

4. In the **Profile** drop-down list, select the interface settings profile you want to assign to the group.



Only the generic profiles display in the drop-down list. The custom settings profiles of users are excluded.

5. If you want to override the custom profiles that the group members may have created, leave the **Override the user's custom profiles, if any** checkbox checked.

If you only want to assign the profile selected to the users who do not have a custom profile, clear the checkbox.

6. Click **OK** to close the dialog.

A warning message reminding you that applying these modifications will disconnect the users displays.

7. Click **Yes**.

The interface settings profile selected has been assigned to the group members.



You can use the same procedure to assign an interface settings profile to all the members of a role. However, assigning interface settings profiles to groups and roles may end up confusing: we recommend that you do not assign interface settings profiles to roles.

ASSIGNING AN INTERFACE SETTINGS PROFILE TO ALL THE USERS OF A SERVER

To assign the same interface settings profile to all the users of a server, proceed as follows:

1. In the left pane of the Administration Tool, click the **Interface settings profiles** branch.

The **Manage interface settings profiles** screen displays in the right pane.

2. At the bottom of the right pane, click the **Change profile** button.

The **Change profile** dialog displays.

3. In the **Profile** drop-down list, select the interface settings profile you want to assign to all the users of the server.



Only the generic profiles display in the drop-down list. The custom settings profiles of users are excluded.

4. If you want to override the custom profiles that the users may have created, leave the **Override the user's custom profiles, if any** checkbox checked.

If you only want to assign the profile selected to the users who do not have a custom profile, clear the

checkbox.

5. Click **OK** to validate and close the dialog.

A warning message reminding you that this operation is irreversible displays.

6. Click **Yes**.

A warning message reminding you that applying these modifications will disconnect the users displays.

7. Click **Yes** again.

The modification has been applied: all the users of the server now have the profile selected (except those who have a custom settings profile, if you have cleared the **Override the user's custom profiles, if any** checkbox at step 4).



Assigning the same interface settings profile to all the users of a server does not modify the default and guest user profiles definition.

SETTING THE DEFAULT AND GUEST USERS PROFILES

To select the default profile to be assigned to newly created users:

1. In the left pane of the Administration Tool, click the **Interface settings profiles** branch.

The **Manage interface settings profiles** screen displays in the right pane.

2. In the **Options** section, in the **Default** drop-down list, select the interface settings profile you want to set as default profile.



Only the generic profiles display in the drop-down list. The custom settings profiles of users are excluded.

A message asking if you want to retroactively assign the new profile to the users who had been assigned the former default profile displays.

3. Click **Yes** or **No**.

The new default profile has been set: the next user created will be assigned this profile.

To select the guest user profile, proceed in the same way as for the default profile, using the **Guest user** field located right below the **Default** field.

The same profile can be set as default and guest user profile.

DISPLAYING THE USERS ASSIGNED TO AN INTERFACE SETTINGS PROFILE

To know which users are assigned to an interface settings profile, proceed as follows:

1. In the left pane of the Administration Tool, click the **Interface settings profiles** branch.
The **Manage interface settings profiles** screen displays in the right pane.
2. In the **Interface settings profiles list**, click the name of the profile which users you want to know.
The corresponding management screen displays in the right pane.
3. In the bottom right corner of the right pane, click the **Users using this profile** button.
The **Profile users** dialog displays: it contains the list of all the users the current interface settings profile is assigned to.
4. Click **OK** to close the dialog.

DELETING AN INTERFACE SETTINGS PROFILE

To delete an interface settings profile, proceed as follows:

1. In the left pane of the Administration Tool, click the **Interface settings profiles** branch.
The **Manage interface settings profiles** screen displays in the right pane.
2. In the **Interface settings profiles list**, click the name of the profile you want to delete.
The corresponding management screen displays in the right pane.
3. In the bottom left corner of the right pane, click the **Delete** button.
A message asking you to confirm the deletion displays.
4. Click **Yes**.
The interface settings profile has been deleted: it does not display in the **Interface settings profiles list** any longer.



You cannot delete the profile(s) set as default and guest user profile.

If a profile assigned to one or more users is deleted, the corresponding users are assigned to the default profile.