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# Krysta™ EDMS User Manual Version 2.1

## **FIRST EDITION**

July 2006

This edition applies to the licensed program Krystal™ EDMS Version 2.1 and to all subsequent releases and modifications until otherwise indicated in new editions. Please make sure you are using the proper edition for the level of the product.

All the names in this manual are fictional and any resemblance to existing people or firms is purely coincidental. If you have any comments about the manual or the product, we would very much like to hear from you.

Please send your comments by e-mail to [info@primeleaf.in](mailto:info@primeleaf.in) or by fax to +91 2447 3373.

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# Introduction to Krystal™ EDMS

**Krystal™ EDMS** is easy to use, powerful and cost-effective document management software that allows companies to centralize the management, storage, retrieval and distribution of documents.

Built with robust, scalable architecture, **Krystal™ EDMS** can be deployed over LAN, WAN or Internet in large Enterprises. These Products also empower individuals and organizations by acting as powerful knowledge management tools.

**Krystal™ EDMS** addresses the needs of many vertical markets, including manufacturing, architecture, engineering, construction, utilities, universities, and government agencies.

## ***Krystal™ EDMS Features***

### **Robust Document Management with Version Control**

Document Management also enables you to manage document creation and revising. Through a check-out/check-in function, documents can be versioned and multiple revisions of the same document can be stored and archived.

### **Accessible over the Internet, WAN or LAN**

Being a completely web based solution, **Krystal™ EDMS** can be accessed over internet, WAN or LAN. The only client software to view your documents is a standard web browser.

### **Multi-Domain functionality**

Create independent domains (work areas) for different departments or divisions to organize documents and knowledge workers according to their business function. Share document classes across domains and assign multiple domains to users.

### **LDAP / Active Directory Integration**

Krystal™ EDMS is integrated with LDAP, and with Active Directory, to allow you to authenticate user login IDs created in **Krystal™ EDMS** with those already existing in your LDAP / Active Directory database. Hence users need only remember a single user login and password in order to access the various applications in your network environment to which they are authorized.

### **Template based Access Control**

ACL Templates is a smart and easy way to manage the system permission. Administrator can create various ACL Templates and assign rights to these templates for public, users, groups and roles.

## **Document Retention and Ageing**

**Krystal™ EDMS** offer you the flexibility to define retention policies that reflect the specific needs of your organization. You can define as many, or as few, retention policies as you need.

## **Detailed Audit Reports**

At any time, system administrators can review comprehensive system audit reports containing precise and detailed information about all domain activity and resource usage.

## **Low Startup Cost**

Low cost of ownership - an affordable, web-driven solution that doesn't require extensive service, support, networking or user training keeps the total cost of system to a minimum. An affordable web-based solution requiring minimal licensing fees, networking infrastructure or training ensures low cost of ownership.

## **System Structure**

Krystal™ EDMS comprises mainly of 2 major components

- Domains
- Document Repository

These components are user defined hence it helps a better representation of your business. For further details on system configuration and administrator please refer to Administrator's Guide.

## **Domains**

Each domain typically represents a relatively self-contained department, division or location of an organization. Primarily it groups related users and related document classes by their job / business function.

Administrators can create more than one domain in a single server environment depending upon the licensing of the application. Each domain can then be assigned an Administrator who will configure and monitor it. For further details on system configuration and administrator please refer to Administrator's Guide.

All end users are given a username and password and are assigned to one or more domain. Users can login to their assigned domain(s) and get access to those domain specific documents. All documents are domain specific and are stored and manipulated independently of the other domains. A document class can be shared among domains.

After logging on to a specific domain, user gets access to all the domains assigned to her by selecting the domain name from a drop down available from top navigation panel.

## Document Repository

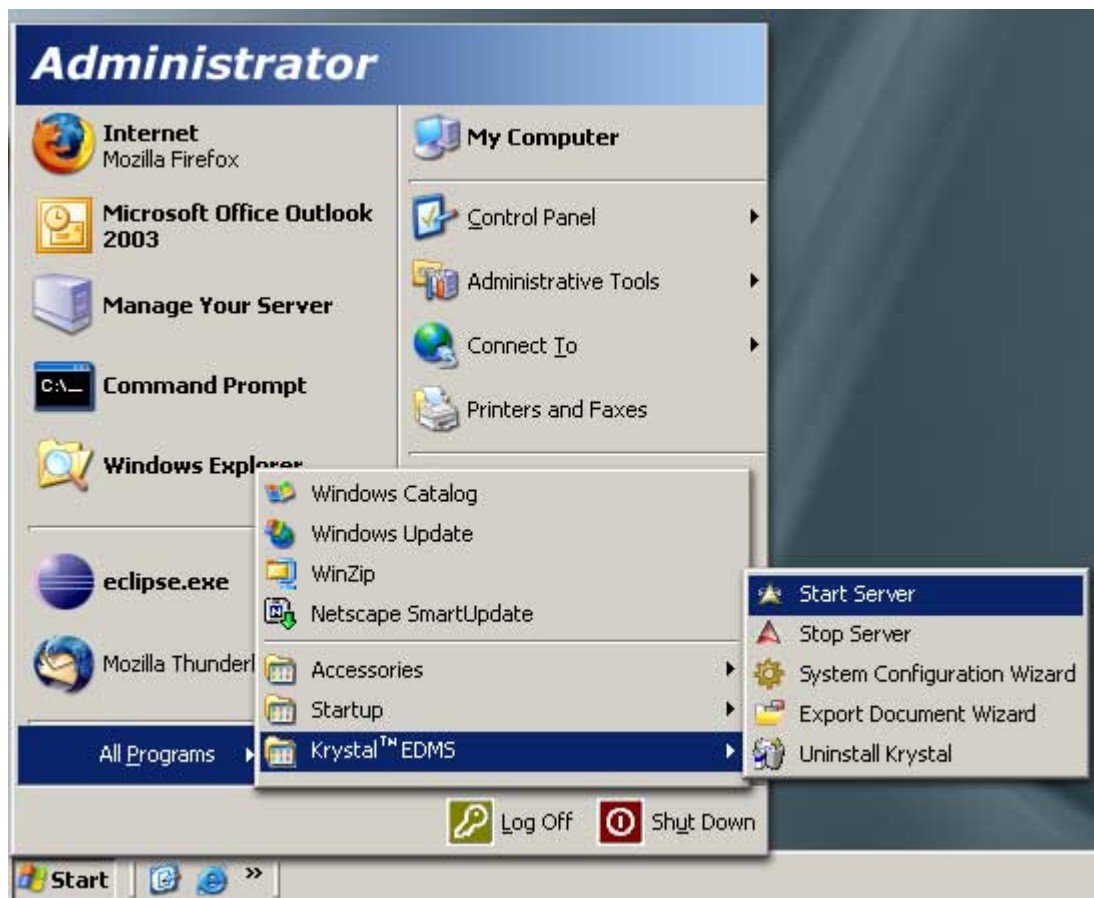
Every document uploaded, created or imported to **Krystal™ EDMS** is stored on the server inside a Document Repository. It is a unified domain based storage system which stores and maintains all types of documents and meta-data.

As an enterprise class Document Management System, **Krystal™ EDMS** can accommodate all types of electronic documents, including scanned physical files (TIF, JPG), PDF, MS-Office files and faxes.

## Starting Krystal™ EDMS

**Krystal™ EDMS** server is installed as a Windows NT Service on Microsoft Windows platforms. You can use services control panel to start and stop **Krystal™ EDMS**.

Alternately, you can use Start -> All Programs -> Krystal™ EDMS -> Start Server to start the server on Windows based platforms.



On Linux or Solaris distributions, you can use the script “StartServer.sh” located in KRYSTAL\_HOME/bin/ folder to start the server

To verify the installation and configuration of **Krystal™ EDMS** server, you can open the browser and visit <http://localhost/> to get connected.

If you are on a machine other than on which **Krystal™ EDMS** is installed then visit <http://hostname:portno/> where hostname is the name / IP address of the machine where it is installed and 'port number' on which it is configured to be running.

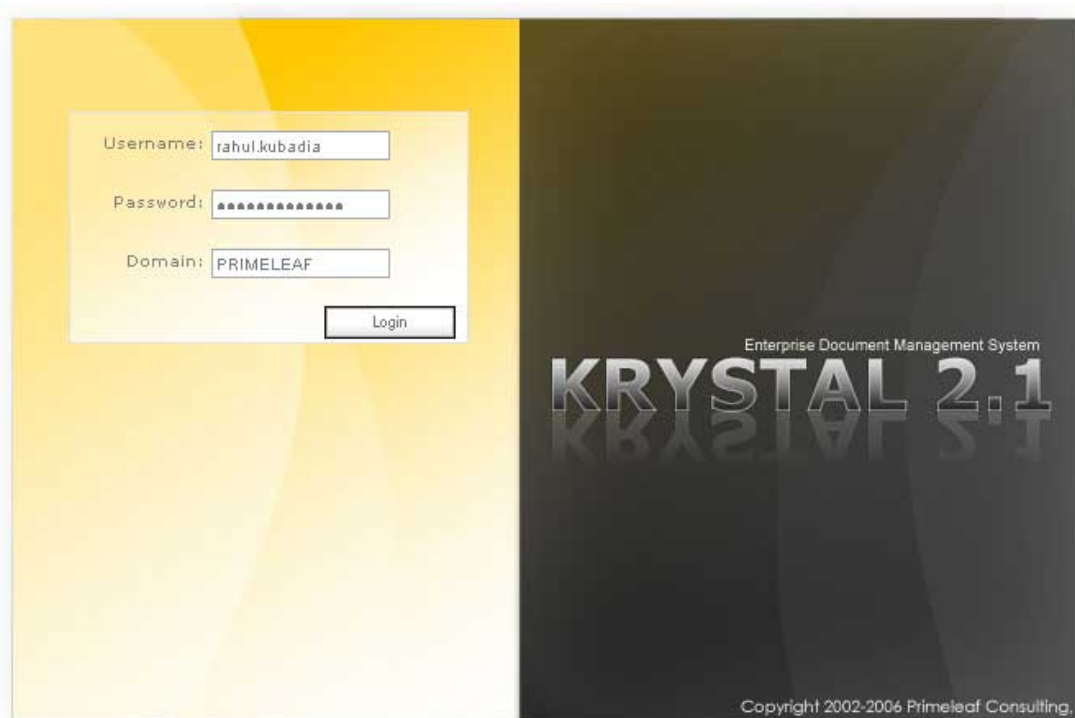
## Getting Started

**Krystal™ EDMS** is a complete web-based solution. Hence once it is installed on the server, only software required to use it, is internet browser.

End users rarely required training and if they do we have this complete web based training system free of charge for our customers. We strive to keep things simple.

## Accessing Krystal™ EDMS

**Krystal™ EDMS** can be accessed using any standard Java enabled web browser from any where on your corporate intranet / extranet or internet.

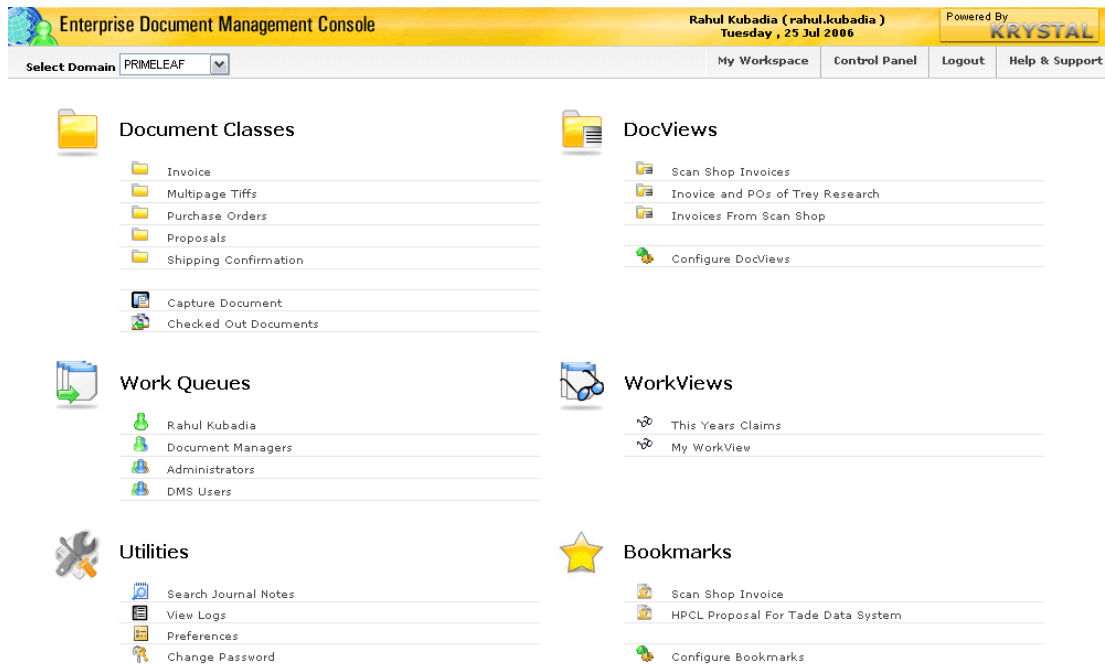


To gain access to **Krystal™ EDMS**, users need to supply their secure username, password and domain name. Once logged in, users can navigate through all accessible documents under the current domain **via Enterprise Document Management Console (EDMC)**.

### Enterprise Document Management Console (EDMC)

The Enterprise Document Management Console (EDMC) is designed in such a way that users can get to the required documents in as few clicks as possible. On logging to the **Krystal™ EDMS** user is presented his / her workspace. This area is designated as My Workspace.





## My Workspace

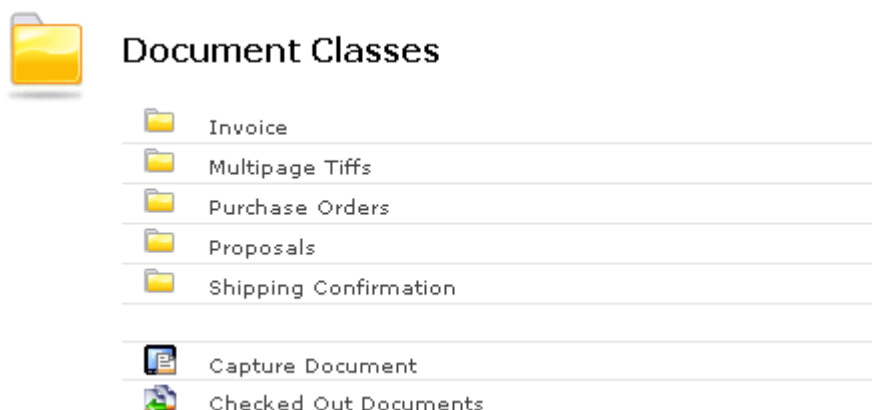
All Document Classes, DocViews, Bookmarks of users are displayed on this section. If Workflow is enabled then all Work queues and WorkViews assigned to user are also displayed. Users can access various utilities such as Search Journal Notes, Preferences, and Change Password etc directly from here.

Click **Logout** link on top navigation bar to logout from EDMC

## Browsing Document Classes

Document Classes are nothing but a group of similar documents. Document which are similar in its functional capabilities are grouped under a particular document class. For example, "INVOICES", "Purchase Orders", "Shipping Confirmations" etc

Document Classes can be accessed from **My Workspace** module. All document classes to which users have permissions are listed here



On clicking on any document class, a list of indexes associated with it gets listed. Users can enter search criteria (filters) on indexes to restrict the document hit list.

**My Workspace > Filter : Invoice** ?

Enter filter values and click on **Show Hits** button to get the document hit-list

---

**Available Document Indexes**

Order Date	Is	<input type="text"/>	
Purchase Number	Is	<input type="text"/>	
Customer Name	Like	<input type="text" value="Trey"/>	
Invoice Number	Is	<input type="text"/>	

**Document Properties**

Created	From	<input type="text"/>		To	<input type="text"/>	
Document Type	Tagged Image File Format (*.TIF)					
Created By	All ---					

After applying the filters, all the documents matching the filter criteria are listed from selected document class. If the size of resultant hit list is larger than the hit list preference set by the user then navigation buttons are displayed at the bottom of the screen, which allows users to browse the document class

**My Workspace > Filter : Invoice > Document Hitlist : Invoice ( INVOICE )** ?

Showing 1 to 6 of 6

	Created By	Revision Id	Order Date	Purchase Number	Customer Name	Invoice Number	File Size	Created	Annotations
	SYSTEM	1.0	01/01/2004	002345	Trey Research	60035	13.3 KB	06/29/06 14:16	
	SYSTEM	1.0	01/01/2004	002345	Trey Research	60035	13.3 KB	06/29/06 14:15	
	SYSTEM	1.0	01/01/2004	002345	Trey Research	60035	13.3 KB	06/29/06 14:14	
	SYSTEM	1.0	01/01/2004	002345	Trey Research	60035	13.3 KB	06/29/06 14:13	
	SYSTEM	1.0	01/01/2004	002345	Trey Research	60035	13.3 KB	06/29/06 14:12	
	SYSTEM	1.0	01/01/2004	002345	Trey Research	60035	13.3 KB	06/02/06 13:18	

## Searching Repository

The ready availability of information is integral to virtually every stage of any business or decision-making process and the powerful **Krystal™ EDMS** search engine ensures that any information resource contained anywhere within the repository can be instantly retrieved.

With a minimum of input, you can rapidly retrieve the information you need using any of a variety of flexible search parameters to pinpoint the precise location of specific documents.

Multiple concurrent users can search and view the contents of all repository documents to which they have been assigned at least read-level access privileges.

If you are looking for a particular document in particular document class then click on the document class from My Workspace. A index filter list will appear. Filter list provides user with various criteria to filter out the required document. User can select any of the predefined criteria from the drop down and provide value to the text box adjacent to it to retrieve the required document.

**My Workspace > Filter : Invoice** ?

Enter filter values and click on **Show Hits** button to get the document hit-list

---

**Available Document Indexes**

Order Date	Between	10/10/2005	04/10/2006
Purchase Number	Is		
Customer Name	Like	Scan Shop	
Invoice Number	Is		

**Document Properties**

Created	From	05/20/2006	To 07/20/2006
Document Type	Tagged Image File Format (*.TIF)		
Created By	All ---		

All the matching records are displayed as a document hit list. If a single document is qualified then the document is directly shown to the user (dependent on the configuration).

Searches can be carried out not just on the index fields but also on the meta data like owner, creator of document , file type of document , creation date etc. You can apply more than one filter to narrow the search and get to the exact document match.












## Working with Documents

User can perform diverse range of operation on the documents in EDMC by clicking on and selecting any of the following action available according to access permissions from resultant hit list.

	Created By *	Revision No	Order Date	
	ADMINISTRATOR	1.0	05/04/2006	
	SWAPNIL	1.0	05/05/2006	
	SYSTEM	1.0	01/12/2003	
	SYSTEM	1.0	01/01/2004	
			05/02/2004	
			01/12/2003	
			01/01/2004	
			05/02/2004	
			01/12/2003	
			01/01/2004	
			01/01/2004	

Context menu for a document row:

- View Document
- Bookmark Document
- Checkout
- Revision History
- Edit Indexes
- Delete Document
- Show Related Documents
- Journal Notes
- Show Access History

	<b>View Document:</b> To view the document you can click here or on any index field. On clicking <b>Krystal™ Viewer</b> will open and document is displayed to the user. If the file format is not supported by <b>Krystal™ Viewer</b> then it will automatically prompt you to download the file to a local system where you can then open it within its native application.
	<b>Bookmark Documents:</b> To bookmark the document for quick access in future, user can use this option
	<b>Check Out Document:</b> If revision control is enabled on the document class and user has permission to check-out the document for editing then this option will be available. User can check-out document on the local machine and can edit an check-in the document back to <b>Krystal™ EDMS</b> . Once the document is checked out, no one except Administrator can check-in / check-out the document.
	<b>Check In Document:</b> If revision control is enabled on the document class and document is checked out and user has permission to check-in the document then this option will be available. User can check-in document from the local machine and can also update the indexes associated with the document.
	<b>Cancel Check Out:</b> User who has checked out the document can cancel the checkout using this option.
	<b>Revision History:</b> User can view complete revision history of the document by selecting this option from the action list. It displays complete details of whether the document was checked out or checked in, when and who performed the operation.
	<b>Edit Indexes:</b> To change the indexes associated with the document, users can use this option. Each edit operation is logged into <b>Krystal™ EDMS</b> but the version no of the document does not get updated. Users will edit permission on the document class can only change the index values of the document.
	<b>Delete Document:</b> To delete the document from the repository use the delete document option from the action list.
	<b>Show Related Documents:</b> Document classes are linked with each other using the feature called related documents. All documents related to the current document in other document classes can be accessed using the single click operation. Domain administrators can link more than one document class with each other using the common index fields of the document classes.
	<b>Journal Notes :</b> To work with Journal Notes click this icon
	<b>Show Access History:</b> Every action performed on the document is logged into <b>Krystal™ EDMS</b> . Each read / writes / edits operation along with the user, time, IP address is logged. You can use this option to view the complete access history of the document. Access history also stores details like creation / updating / deletion of annotations on the document.

## Audit Logs

At any time, system administrators can review comprehensive system audit reports containing precise and detailed information about all domain activity and resource usage.

Additionally, it is possible to view all activity within a fixed time frame by specifying an exact or approximate date range.

In this way, every event or operation can be traced to its exact origin so as to ensure end-user accountability and strict compliance with internal or external regulatory standards.

### Krystal™ EDMS provides multiple audit log reports

- Access History
- User Access Logs

#### Access History

This report provides a complete access history of each document by all users. It displays username, IP address, date and time of access, type of access and operation performed.

**Access History** ?

Following is the Access History for selected object

**Filter Access History**

Datetime      From  To

Action	User	IP Address	Date time	Parameteres	Comments
Accessed	RAHUL	127.0.0.1	07/20/06 18:35		Perfomed On 32
Accessed	ADMINISTRATOR	10.1.1.10	07/19/06 17:15		Perfomed On 32
Accessed	ADMINISTRATOR	10.1.1.10	07/19/06 17:10		Perfomed On 32
Accessed	RAHUL	127.0.0.1	07/13/06 15:09		Perfomed On 32
Created	RAHUL	127.0.0.1	07/13/06 15:09	Annotation Type:RUBBERSTAMP	Perfomed On 32
Accessed	RAHUL	127.0.0.1	07/13/06 15:08		Perfomed On 32
Accessed	RAHUL	127.0.0.1	07/11/06 18:51		Perfomed On 32
Created	RAHUL	127.0.0.1	07/11/06 18:50	Annotation Type:HIGHLIGHT	Perfomed On 32
Accessed	RAHUL	127.0.0.1	07/11/06 18:50		Perfomed On 32
Accessed	RAHUL	127.0.0.1	07/11/06 18:48		Perfomed On 32

◀
▶

Each entry is logged at different level, read, write, edit , create , delete are at level 1, where as operations like annotation , adding attachment are logged at level 2.

## User Access Logs

This report details every access to Krystal™ EDMS by username, IP address, date and time and operation performed. It logs details like login and logout at level 1 and details like change of password and preferences at level 2

**Control Panel > Manage Users > Access History**

Following is the Access History for selected object

**Filter Access History**

Datetime From  To


Action	User	IP Address	Date time	Parameteres	Comments
Preferences Changed	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:31		Perfomed On Rahul Kubadia
Preferences Changed	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:30		Perfomed On Rahul Kubadia
Accessed	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:28		Perfomed On Invoice
Accessed	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:28		Perfomed On Invoice
Accessed	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:23		Perfomed On Invoice
Logged in	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:20		Perfomed On Rahul Kubadia
Logged out	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:07		Perfomed On Rahul Kubadia
Edited	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:07		Perfomed On Rahul Kubadia
Accessed	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:05		Perfomed On Proposals
Accessed	RAHUL.KUBADIA	127.0.0.1	07/25/06 15:05		Perfomed On Invoice

Details

## Version Control

**Krystal™ EDMS** allows users to checkout and check-in documents in to repository. Users with check-out permissions can check out document from a the document class by using the Check-out Option from the action list.. The document is then downloaded on the local machine into a pre-defined path set by user in the preferences.

**My Workspace > Checkout** ?

 Checking out document at C:\TEMP\Krystal\_30\_1\_1\_Obj.TIF ....Done


Each time a document is checked back in to the repository after alterations on a local machine, Krystal™ EDMS automatically creates and securely stores a new version so that no previous version is ever overwritten. To view a comprehensive version history for a particular document, select the Revision History from within the document hit list.








**My Workspace > Revision History** ?

**Revision History**  
Following table lists the revision history for selected object.

Revision Id	Action	Date	User
1.1	OBJECT CHECKED IN	07/25/06 14:16	Rahul Kubadia
1.1	OBJECT CHECKED OUT	07/25/06 15:32	Rahul Kubadia
1.0	OBJECT CHECKED OUT	07/25/06 14:11	Rahul Kubadia

User can see all the checked out documents by him / her by using the Checkout Documents link on the **My Workspace**.

 **Document Classes**





















-  Invoice
-  Multipage Tiffs
-  Purchase Orders
-  Proposals
-  Shipping Confirmation
-  Capture Document
-  **Checked Out Documents**

User can perform following tasks through this module.

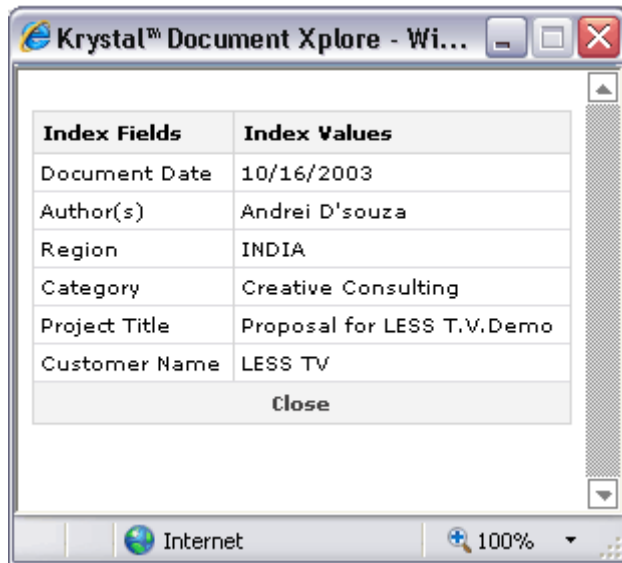
- View Document
- View Indexes
- View Revision History
- Cancel Checkout
- Check-in Document

**My Workspace > Checked Out Documents** ?

**Checked Out Documents**  
The following documents have been checked out.

	Document Class	Checkout Path	Date time	
  	Invoice (INVOICE)	C:\TEMP\Krystal_31_1_0_Obj.TIF	07/25/06 13:36	 
  	Invoice (INVOICE)	C:\TEMP\Krystal_28_1_0_Obj.TIF	07/25/06 14:42	 
  	Proposals (PROPOSALS)	C:\TEMP\Krystal_50_1_0_Obj.DOC	07/25/06 13:37	 
  	Invoice (INVOICE)	C:\TEMP\Krystal_30_1_1_Obj.TIF	07/25/06 15:32	 

Indexes associated with the documents are displayed as a popup when user clicks on the View Indexes icon as shown below



To Check-in the document user can use Check-in Document icon link or user can use the action list drop down menu of document Hit list.

**My Workspace > Check In Document : Proposals** ?

---

**Check In Document**  
Enter document details and checkin the document.

---

**Enter details of the document below.**

Path	<input type="text" value="C:\Proposals\LessTV\Version1.1.doc"/>	<input type="button" value="Browse..."/>
Customer Name	<input type="text" value="LESS TV"/>	
Project Title	<input type="text" value="Proposal for LESS T.V.Demo"/>	
Author(s)	<input type="text" value="Andrei D'souza"/>	
Category	<input type="text" value="Creative Consulting"/>	
Region	<input type="text" value="INDIA"/>	
Document Date	<input type="text" value="10/16/2003"/>	<input type="button" value="Calendar"/>
Comments	<input style="height: 40px;" type="text" value="New version created as scope is changed"/>	

All available indexes of the document class is displayed along with option to select the document to be checked in. The comments added by the user while checking the document is added as a Journal Note for the document.



## DocViews

**DocViews** are similar to the views made on database tables. In this case the database tables are replaced by **document classes**. A snapshot of document class is known as a **DocViews**.

Just like database views, **DocViews** also provides a read only access to the selected document classes. Users with administrative privileges can create Public and Private **DocViews** . Normal users can create views which are Private and are accessible only by them.

**My Workspace > Configure DocViews** ?

---

**Configure DocViews**  
This module allows you to configure DocViews.

	Description	Created By
<input type="radio"/>	SCANSHOP (Scan Shop Invoices)	Administrator
<input type="radio"/>	TREY_INV&PO (Invoice and POs of Trey Research)	Administrator
<input type="radio"/>	SCANSHO_INVOICE (Invoices From Scan Shop)	Rahul Kubadia
<input type="radio"/>	TREY_INV (Invoices For Trey Research)	Administrator
<input type="radio"/>	MYINVOICE (My Invoices)	Administrator

**DocViews** cannot be modified but they can be deleted by the user who created it or by administrator.

A **DocView** can contain more than one document class, just like joins in database tables. User can link two or more document classes also using **DocViews**. To create a **DocView**, click on **New...** button on Configure **DocViews** module.

Following steps are required for creation of **DocView**.

**My Workspace > Configure DocViews > Create DocView** ?

---

**Create DocView (Step 1 of 4)**  
This module will help you create a DocView. Please select a document class from the list given below

	Document Classes
<input checked="" type="checkbox"/>	Invoice
<input type="checkbox"/>	Multipage Tiffs
<input checked="" type="checkbox"/>	Purchase Orders
<input type="checkbox"/>	Proposals
<input type="checkbox"/>	Shipping Confirmation

In step1, user is asked to select at least one document class from the available document classes.

**My Workspace > Configure DocViews > Create DocView** ?

**Create DocView (Step 2 of 4)**  
This module will help you create a Docview. Select index fields and define criteria for DocView.

Select Index Fields			
<b>Invoice</b>			
<input type="checkbox"/>		Order Date	<input type="text"/>
<input checked="" type="checkbox"/>		Purchase Number	<input type="text" value="001234"/>
<input type="checkbox"/>		Customer Name	<input type="text"/>
<input checked="" type="checkbox"/>		Invoice Number	<input type="text"/>
<b>Purchase Orders</b>			
<input checked="" type="checkbox"/>		PO Date	<input type="text"/>
<input checked="" type="checkbox"/>		Customer Number	<input type="text"/>
<input checked="" type="checkbox"/>		Customer name	<input type="text"/>
<input checked="" type="checkbox"/>		PO Number	<input type="text"/>

After selecting document class user will be asked to select indexes from each of the selected document classes. User can set search criteria at this stage for each of the index.

**My Workspace > Configure DocViews > Create DocView** ?

**Create DocView (Step 3 of 4)**  
Please enter a name and description for DocView, and specify the scope (public/private). Click Submit to create the Docview.

Name	<input type="text" value="INV_PO_00"/>
Description	<input type="text" value="Invoice and PO 001234"/>
DocView Type	<input type="radio"/> Public <input checked="" type="radio"/> Private

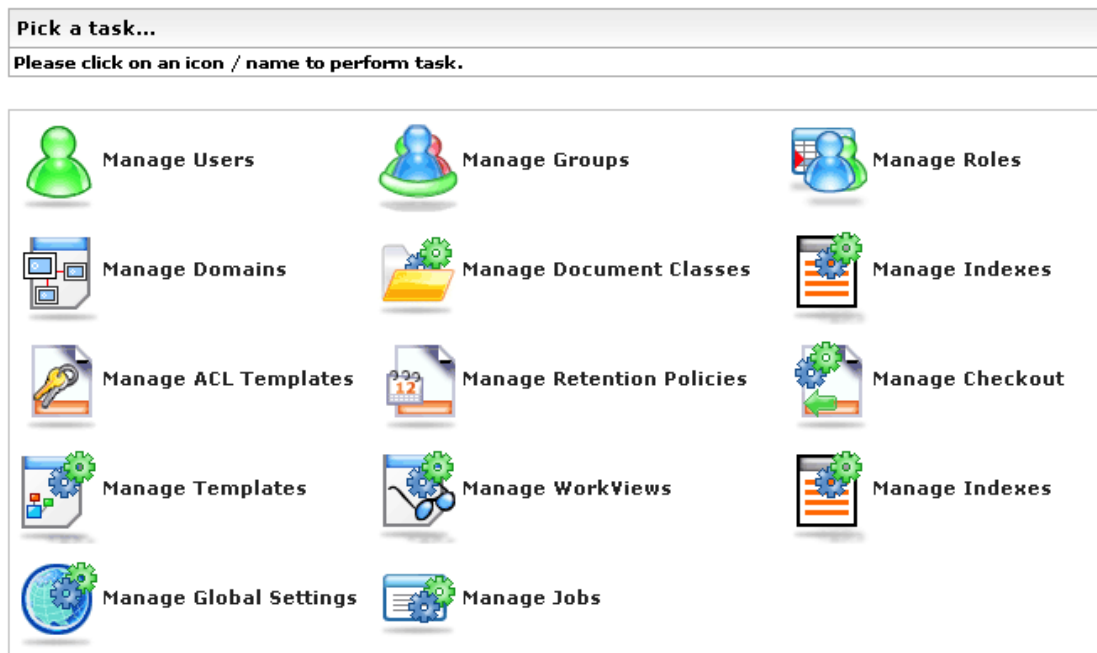
Select Document Class		
<b>Invoice</b>		
	<b>Selected Indexes</b>	<b>Filter Preset</b>
	Purchase Number	001234
	Invoice Number	
<b>Purchase Orders</b>		
	<b>Selected Indexes</b>	<b>Filter Preset</b>
	PO Date	
	Customer Number	
	Customer name	
	PO Number	

If user has administrative privileges then option of creating Private or Public **DocView** appears here else it is Private only. To create a DocView, click on **Save** button.

**DocViews** are listed on My Workspace once user logs into the system. On clicking the **DocView** an index filter screen appears and user can further refine the search of documents.

## Control Panel


Users with administrative privileges can access the control panel of **Krystal™ EDMS** using the menu available on top of each page. This menu item is available only to those users who have administrative rights / privileges.



The default administrator user name and password are "administrator" and "admin" respectively. Administrator can create other administrator users by assigning them "Administrators" group.

## Manage Users

On installation only a default administrator user is available. After logging into Krystal™ EDMS the administrator can create new users via Control Panel.

Manage Users module of Control Panel allows administrators to create, delete, and modify users along with tracking the access history of each user. Administrators can also change the password of all the users by clicking on the  icon.

Control Panel > Manage Users									
Manage Users									
Please click on the User Name to modify it.									
	Real Name	Username	User Email	Description	Last Login	IP Address	Work Queues	Can Search?	
<input type="checkbox"/>	Administrator	ADMINISTRATOR	administrator@primeleaf.in	Administrator	07/25/06 15:43	127.0.0.1			
<input type="checkbox"/>	Pooja Kubadia	POOJA	pooja.kubadia@primeleaf.in	Developer		null			
<input type="checkbox"/>	Prajakta Mule	PRAJAKTA	prajakta.mule@primeleaf.in	Trainee		null			
<input type="checkbox"/>	Abhijit Shetye	ABHIJIT	abhi@primeleaf.in	Developer	06/20/06 11:16	127.0.0.1			
<input type="checkbox"/>	Rahul Kubadia	RAHUL.KUBADIA	rahul.kubadia@primeleaf.in	Developer	07/25/06 15:20	127.0.0.1			
<input type="checkbox"/>	Dharmesh Modi	DHARMESH.MODI	dharmesh.modi@primeleaf.in	Developer	07/03/06 19:30	10.1.1.202			
<input type="checkbox"/>	Andrei D'souza	ANDREI	andrei.dsouza@primeleaf.in	Creative Designer		null			

Administrators can add new users to their domains and can modify or delete users only pertaining to their domains. System administrator can create users for every domain and can assign multiple domains to users.

On clicking on the **New...** button, administrator can add a new user to its domain as shown below

Control Panel > Manage Users > Add User	
Add User	
<b>Please enter details below.</b>	
Real Name	<input type="text" value="Ravi Kumar"/>
Username	<input type="text" value="ravi"/>
Password	<input type="password" value="*****"/>
Confirm Password	<input type="password" value="*****"/>
User Email	<input type="text" value="ravi.kumar@primeleaf.in"/>
Description	<input type="text" value="Sales Manager"/>
Work Queues	<input checked="" type="radio"/> Yes <input type="radio"/> N
Can Search?	<input checked="" type="radio"/> Yes <input type="radio"/> N
LDAP / ADSI	-- NONE --
Select Domain	<input type="text" value="PRIMELEAF"/> <input type="text" value="DELHI"/> <input type="text" value="MUMBAI"/> <input type="text" value="ARYSYS"/>
Select Group	<input type="text" value="Administrators"/> <input type="text" value="DMS Users"/> <input type="text" value="Managers"/>
Select User Roles	<input type="text" value="Document Managers"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="text" value="Registered Nurse"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

Enter details like username, real name, email, password, description etc and click on **Save** to create user. If user needs to be authenticated against the Active Directory or LDAP domain then select the Domain Name from the drop down.

To modify details of a particular user, click on the username on the Manage User dialog

**Control Panel > Manage Users > Modify Users**

**Modify Users**

**Please enter details below.**

Username	<b>RAHUL.KUBADIA</b>
Real Name	<input type="text" value="Rahul Kubadia"/>
User Email	<input type="text" value="rahul.kubadia@primeleaf.in"/>
Description	<input type="text" value="Developer"/>
Work Queues	<input checked="" type="radio"/> Yes <input type="radio"/> N
Can Search?	<input checked="" type="radio"/> Yes <input type="radio"/> N
LDAP / ADSI	<input type="text" value="ARYSYS"/> ▼
Select Domain	<div style="border: 1px solid gray; padding: 2px;">           PRIMELEAF            DELHI            MUMBAI            ARYSYS         </div>
Select Group	<div style="border: 1px solid gray; padding: 2px;">           Administrators            DMS Users            Managers         </div>
Select User Roles	<div style="border: 1px solid gray; padding: 2px;"> <input checked="" type="checkbox"/> Document Managers ▲  <input type="checkbox"/> Super Claims Administrator  <input type="checkbox"/> Claims Administrator  <input type="checkbox"/> Registered Nurse ▼         </div>

To set a user as domain administrator, go to the modify user dialog and select administrators group. The administrative privileges can be revoked later by un checking the administrators group from modify user dialog.

## Manage Groups

Groups consist of one or more users. Administrators can create any number of groups they want and each group can consist of any number of members. **Krystal™ EDMS** allows administrator to assign roles to groups as well. A group can also have more than one role. Group Management tasks can be performed using Manage Groups module.

**Control Panel > Manage Groups**

**Manage Groups**  
Please click on the Group Name to modify.

	Group Name	Group Description	Group Email
	ADMINISTRATORS	Administrators	administrator@arysys.com
<input type="checkbox"/>	USERS	DMS Users	users@primeleaf.in
<input type="checkbox"/>	MANAGERS	Managers	manager@primeleaf.in

User can add a group by click on the **New** button, following dialog will be displayed.

<b>Control Panel &gt; Manage Groups &gt; Add Group</b>	
<b>Add Group</b>	
<b>Please enter details below.</b>	
Group Name	CLERKS
Group Description	Documentation Clerk
Group Email	clerks@primeleaf.in
Select Domain	<ul style="list-style-type: none"> <li>PRIMELEAF</li> <li>DELHI</li> <li>MUMBAI</li> <li>ARYSYS</li> </ul>
Set Group Roles	<ul style="list-style-type: none"> <li>Document Managers (DOCUMENTM) ▲</li> <li>Super Claims Administrator (CLAIM) □</li> <li>Claims Administrator (CLAIMSADM) ▨</li> <li>Registered Nurse (NURSE) ▼</li> </ul>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

For domain administrators, the group will be added for the currently logged in domain, whereas the administrator user will have option to choose the domains as well.

Domain Administrators can modify only groups which are associated with the current domain whereas the administrator can modify all groups available in the system.

To modify details of existing group, administrator can click on group name or email. On clicking the group name following dialog will appear

<b>Control Panel &gt; Manage Groups &gt; Modify Group</b>	
<b>Modify Group</b>	
<b>Please enter details below.</b>	
Group Name	MANAGERS
Group Description	Account Managers
Group Email	manager@primeleaf.in
Select Domain	<ul style="list-style-type: none"> <li>PRIMELEAF</li> <li>DELHI</li> <li>MUMBAI</li> <li>ARYSYS</li> </ul>
Modify Group Roles	<ul style="list-style-type: none"> <li>Document Managers (DOCUMENTM) ▲</li> <li>Super Claims Administrator (CLAIM) □</li> <li>Claims Administrator (CLAIMSADM) ▨</li> <li>Registered Nurse (NURSE) ▼</li> </ul>
<input type="button" value="Update"/> <input type="button" value="Reset"/>	

To apply changes, click on *Update* button.

## Manage Roles

Krystal™ EDMS allows multiple roles for users and groups of the system. To manage roles click on **Manage Roles** link on **Control Panel**. A list of all available roles will be displayed.

Control Panel > Manage Roles				
<b>Manage Roles</b> Please click on the Role Name to modify.				
<input type="checkbox"/>	Role Name	Role Description	Role Email	Role Rank
<input type="checkbox"/>	DOCUMENTMANAGER	Document Managers	docmanager@primeleaf.in	100
<input type="checkbox"/>	CLAIMADMIN	Super Claims Administrator	ca@primeleaf.in	100
<input type="checkbox"/>	CLAIMSADMIN	Claims Administrator		100
<input type="checkbox"/>	NURSE	Registered Nurse		100
<input type="checkbox"/>	PAYABLE	Accounts Payable		100
<input type="checkbox"/>	SUPERVISOR	Supervisor		100
		<input type="button" value="Delete"/>	<input type="button" value="New..."/>	

To add a new role, click on **New...** button. This will display Add Role dialog. Add necessary details and click on **Save** button to add the role.

Control Panel > Manage Roles > Add Role	
<b>Add Role</b>	
<b>Please enter details below.</b>	
Role Name	<input type="text" value="SALES_MANAGER"/>
Role Description	<input type="text" value="Sales Manager"/>
Role Email	<input type="text" value="sm@primeleaf.in"/>
Select Domain	<input type="text" value="PRIMELEAF"/> <input type="text" value="DELHI"/> <input type="text" value="MUMBAI"/> <input type="text" value="ARYSYS"/>
Role Rank	<input type="text" value="50"/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

For domain administrators, the role will be added for the currently logged in domain, whereas the administrator user will have option to choose the domains to which roles needs to be added.

Domain Administrators can modify only roles which are associated with the current domain whereas the administrator can modify all roles available in the system.

To modify a role, click on the role name on the Manage Roles dialog. A modify role dialog will appear, make the necessary changes and click on Update button to save the changes.

**Control Panel > Manage Roles > Modify Role**

**Modify Role**

**Please enter details below.**





Role Name	NURSE
Role Description	<input type="text" value="Registered Nurse"/>
Role Email	<input type="text" value="nurse@primeleaf.in"/>
Select Domain	<div style="border: 1px solid gray; padding: 2px;">           PRIMELEAF            DELHI  <b>MUMBAI</b>            ARYSYS         </div>
Role Rank	<input type="text" value="100"/>

## Manage Domains

Domains are top-level structural units intended to organize groups of related users and relevant document classes according to their job or business functions. Administrators can create / edit domains depending on the license restrictions. To perform domain management task, administrators can use Manage Domains module of Control Panel.

**Control Panel > Manage Domains**

**Manage Domains**  
Please click on the Domain Name to modify.

Domain Name	Domain Description	Type	Active
PRIMELEAF	Primeleaf Consutling	Built-in	
DELHI	DELHI	Built-in	
MUMBAI	Mumbai Domain	LDAP / ADSI	
ARYSYS	ADSI Test Domain	LDAP / ADSI	

To ensure privacy of information, user names and passwords are valid only for those domain(s) to which they are assigned: users can only login to their assigned domain(s) and all documents are domain-specific, stored, and manipulated independently of other domains. The user can move from one domain to another from EDMC if he is assigned to it in a single click.



To add a domain, click on the New button on the manage domains screen. Enter domain name and a small description and check the active checkbox to set the domain active. Domain(s) can be linked to Active Directory or LDAP Servers. To create such domain select LDAP / ADSI type from type dropdown, and provide the Connection String for connecting to ADSI / LDAP Server.

Control Panel > Manage Domains > Add Domain	
Add Domain	
<b>Please enter details below.</b>	
Domain Name	<input type="text" value="PRIMELEAF"/>
Domain Description	<input type="text" value="Primeleaf Consulting (P) Ltd"/>
Type	<input type="text" value="LDAP / ADSI"/> ▼
Connection String	<input type="text" value="http://ldap.primeleaf.local:389/"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

Only active domains will be available for users to login into EDMC

Domain(s) once created, cannot be deleted from the system, but you can change the domain details by clicking on the domain name on Manage Domains dialog.

Control Panel > Manage Domains > Modify Domain	
Modify Domain	
<b>Please enter details below.</b>	
Domain Name	<b>ARYSYS</b>
Domain Description	<input type="text" value="ADSI Test Domain"/>
Type	<input type="text" value="LDAP / ADSI"/> ▼
Connection String	<input type="text" value="ldap://10.1.1.1:389/"/>
Active	<input checked="" type="radio"/> Yes <input type="radio"/> No
<input type="button" value="Update"/> <input type="button" value="Reset"/>	

To save changes click on *Update* button

## Manage Document Classes

Administrators can create any number of document classes using this module. Each document class can be shared across domains and can contain any number of metadata indexes. Document Class management tasks can be performed using Manage Document Class module of Control Panel.

Document classes allow users to sort/group documents based on similar characteristics. Document classes, in addition, controls the way documents can be stored, the retention policy of the document, and access permissions based on ACL templates assigned to it.

**Control Panel > Manage Document Classes**

**Manage Document Classes**

Please click on the Document Class Name to modify it.

		Document Class Name	Document Class Description	Display	Revision Control	
<input type="checkbox"/>		HCFA1500	HCFA1500			View Audit Logs
<input type="checkbox"/>		INVOICE	Invoice			View Audit Logs
<input type="checkbox"/>		MULTIPAGE	Multipage Tiffs			View Audit Logs
<input type="checkbox"/>		PO	Purchase Orders			View Audit Logs
<input type="checkbox"/>		PROPOSALS	Proposals			View Audit Logs
<input type="checkbox"/>		SHIPMENT	Shipping Confirmation			View Audit Logs

To create a new document class, click on New on the manage document classes screen. Enter the required details for creation of document class and click the Save button to create the document class

**Control Panel > Manage Document Classes > Add Document Class**

**Add Document Class**

Please enter details below.

Document Class Name	<input type="text" value="DATASHEETS"/>
Document Class Description	<input type="text" value="Data Sheets"/>
<b>Storage Media</b>	
Media Type	<input checked="" type="radio"/> Database <input type="radio"/> File System
Storage Path	<input type="text" value="DEFAULT"/>
<b>Access Control</b>	
Show Document Class	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Revision Control	<input checked="" type="radio"/> Yes <input type="radio"/> No
Select Domain	<input type="text" value="PRIMELEAF"/> <ul style="list-style-type: none"> <li>DELHI</li> <li>MUMBAI</li> <li>ARYSYS</li> </ul>
<b>Add Index</b>	
Index Name	Index Description
TITLE	<input type="text" value="Project Title"/>
AUTHOR	<input type="text" value="Author"/>
DATE	<input type="text" value="Creation Date"/>
<input type="text" value="PODATE"/>	<input type="button" value="v"/>
<input type="button" value="Add Index"/> <input type="button" value="Save"/> <input type="button" value="Reset"/>	

Only classes which are set for display will be listed in EDMC, if users have rights to access it. If logged in user is a domain administrator then document class will be added to the current logged in domain, whereas administrator user will have an option to choose the domain(s).

User can modify document class by clicking on the document class name link in the main screen.

Control Panel > Manage Document Classes > Modify Document Class	
Modify Document Class	
<b>Please enter details below.</b>	
Document Class Name	<b>PO</b>
Document Class Description	Purchase Orders
<b>Access Control</b>	
Show Document Class	<input checked="" type="radio"/> Yes <input type="radio"/> No
Enable Revision Control	<input type="radio"/> Yes <input checked="" type="radio"/> No
Select Domain	<div style="border: 1px solid black; padding: 2px;">           PRIMELEAF            DELHI            MUMBAI            ARYSYS         </div>
<b>Index Name</b>	<b>Index Description</b>
PODATE	PO Date
CUSTNO	Customer Number
CUSTNAME	Customer name
PONUM	PO Number
Select ACL Template	<div style="border: 1px solid black; padding: 2px;">           Domain Administrator            Document Manager         </div>
<input type="button" value="Update"/> <input type="button" value="Reset"/>	

Once a document class is created user cannot add or delete indexes to it.

## Manage Document Indexes

Indexes are an essential component of document management; they not only provide a stable framework for a document indexing, but ensure that unstructured content can be streamlined and systematized according to any number of user-defined criteria.

Indexes can be used to classify and distinguish documents on the basis of their business function while serving as useful properties for precision searches: if a particular

document class is selected for searching, any document belonging to the selected class can be searched by any of that class's assigned indexes.

Manage Document Indexes module allows administrators to define the server wide indexes, which will be used during the creation of the document classes and storage of documents. To add a new index click on New button on Manage Indexes dialog.

**Control Panel > Manage Indexes**

**Manage Indexes**  
Please click on the Index to modify.

	Index Name	Index Description	Index Length	Index Type	Type
<input type="checkbox"/>	PODATE	ORDER DATE	10	D	G
<input type="checkbox"/>	PONUM	PURCHASE NUMBER	20	S	G
<input type="checkbox"/>	CUSTNAME	CUSTOMER NAME	30	S	G
<input type="checkbox"/>	INVOICENUM	INVOICE NUMBER	20	S	G
<input type="checkbox"/>	PAGECOUNT	NO OF PAGES	10	S	G
<input type="checkbox"/>	test	TEST	12	N	G
<input type="checkbox"/>	CLAIMTYPE	CLAIM TYPE	30	S	G
<input type="checkbox"/>	ORDERNO	Order No	10	S	G
<input type="checkbox"/>	ORDERDATE	Order Date	10	D	G
<input type="checkbox"/>	SHIPDATE	Shipping Date	10	D	G

▶

Indexes can be any one of the following data types:

String: free text strings can be used to describe metadata fields, such as title, subject, name, etc.

Date: the field value must be a valid calendar date.

Number: the field value must be a digital number.

To modify an index, click on the index name. Modify Index screen will appear, make required changes and click on Update button to save the changes.

**Please enter details below.**

Index Name	<input type="text" value="PODATE"/>
Index Description	<input type="text" value="ORDER DATE"/>
Index Type	Date <input type="button" value="v"/>
Index Length	<input type="text" value="10"/>
Type	<input checked="" type="radio"/> General <input type="radio"/> Workflow

### Manage ACL Templates

ACL Templates are smart and easy way to manage the system permission. Administrator can create various ACL Templates and assign rights to these templates for public, users, groups and roles.

These templates can then be assigned to any document class, workflow template and access permissions / rights assigned to templates get automatically delegated to the users, groups and roles which belong to those templates. Use Manage ACL Templates module to perform ACL Template management tasks from Control Panel.

Template Name	Template Description	
DOMAINADMIN	Domain Administrator	Manage Permissions
DOCMANAGER	Document Manager	Manage Permissions

To manage permissions for each ACL Template click on **Manage Permission** link associated with a particular template. By default two ACL templates, **Domain Administrators and Document Managers** are available on installations.

**Control Panel > Manage ACL Templates > Manage Permissions**  
**ACL Template**

**Please enter details below.**

Select ACL Template: Domain Administrator

Assign Permission To:

- Public
- Users: All ---
- Groups: All ---
- Roles: All ---

Submit      Reset

Administrator can select public, user, group or role and click on Assign Permission button. Assign Permissions screen will appear, administrator can then assign any of the following permission to selected template.

- READ
- WRITE
- EDIT
- DELETE
- CHECK-IN
- CHECK-OUT
- PRINT
- EMAIL

**Control Panel > Manage ACL Templates > Manage Permissions > Assign Permissions**  
**Assign Permissions**

ACL Template	Domain Administrator								
Users	Create	Read	Write	Delete	Print	Email	Checkin	Checkout	Select All
Administrator	<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 type="checkbox"/>
Pooja Kubadia	<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"/>
Prajakta Mule	<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"/>
Abhijit Shetye	<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"/>
Rahul Kubadia	<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"/>
Dharmesh Modi	<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"/>
Andrei D'souza	<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"/>
<b>Select All</b>	<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"/>	

Save      Reset

To change the name and description of the ACL Template, click on the ACL Template name, Modify Template screen will appear, make required changes and click on **Save** button to save changes.

## Manage Retention Policies

Retention policies define the length of time that documents stored in a certain document class will be retained in the system before they can be moved to the archive or purged from the system. To manage retention policies, select Manage Retention Policies on the Control Panel. The Manage Retention Policies dialog

Control Panel > Manage Retention Policies			
Manage Retention Policies			
	Policy Name	Policy Description	Related Document Class
<input type="checkbox"/>	INVOICE_POLICY	Invoice Retention Policy	Invoice
<input type="checkbox"/>	PO_POLICY	Purchase Order Retention Policy	Purchase Orders
<input type="button" value="Delete"/>		<input type="button" value="New..."/>	

To create a new Retention Policy, click on **New...** button on the screen.

Control Panel > Manage Retention Policies > Add Retention Policy				
Add Retention Policy				
<b>Please enter details below.</b>				
Policy Name	<input type="text" value="SHIPCONF_POLICY"/>			
Policy Description	<input type="text" value="Policy For Shipping Confirmations"/>			
Document Class	<input type="text" value="Shipping Confirmation"/>			
<b>Create Retention Criteria</b>				
Join	Index Name	Operator	Value	Unit
	<input type="text" value="Created"/>	<input type="text" value="BEFORE"/>	<input type="text" value="90"/>	<input type="text" value="Days"/>
<input type="text" value="OR"/>	<input type="text" value="Shipment Date"/>	<input type="text" value="BEFORE"/>	<input type="text" value="4"/>	<input type="text" value="Weeks"/>
Select Action	<input checked="" type="radio"/> Delete Document <input type="radio"/> Archive Documents			
<input type="button" value="Add Criteria"/>		<input type="button" value="Save"/>	<input type="button" value="Reset"/>	

Enter name of the policy, select the document class to which policy will be applied and add criteria on which the documents will be archived or purged from the system.

To add criteria to the Retention Policy click on the **Add Criteria**. To save the policy, click on **Save** button.

## Manage Checkouts

Administrators or Domain Administrators can view or cancel the checkout operation carried out by a particular user using this module.

To manage checkouts, select Manage Checkouts on the Control Panel. Select the document class and user for whom you want to manage the checkout and click on submit button.

**Control Panel > Manage Checkout**

**Manage Checkout**

Please enter details below.

Select Document Class: All

Select User: Rahul Kubadia

Submit      Reset

From the list displayed, Administrators can select the documents which are checked-out by user and cancel the check-out operation

### **Manage Workflow Templates**

Workflow Templates stores the complete business process logic. Administrators can create new templates and modify existing templates using Manage Workflow Templates module from Control Panel.

**Control Panel > Manage Templates**

**Manage Templates**  
Please click on template name to modify

Template name	Template Description
ISIF	Claims

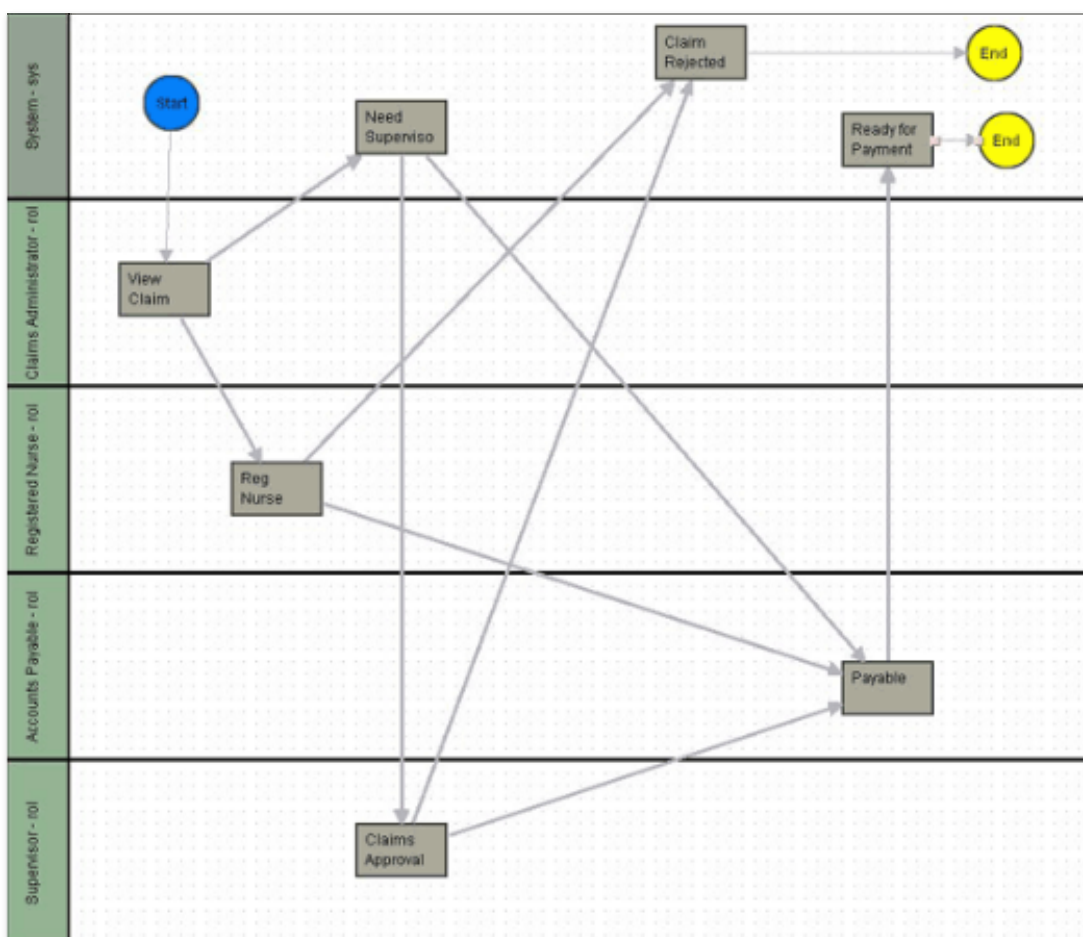
New...

To add a new workflow template, click on the **New ...** button, following dialog will be displayed.



<b>Control Panel &gt; Manage Templates &gt; Add Workflow Template</b>	
<b>Add Workflow Template</b> Enter the parameters for the Workflow Package	
<b>Please enter details below.</b>	
Workflow Id	<input type="text" value="EXPENSE"/>
Workflow Description	<input type="text" value="Travel Expenses"/>
WPDL File	C:\Documents and Settings\Rahul Kuba <input type="button" value="Browse..."/>
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

Krystal uses XPDL for defining the workflow. XPDL stands for XML PROCESS DEFINITION LANGUAGE. Users can define complete business process by using JAWE (Java Workflow Editor Version 1.4)



The generated XPDL is then imported into the system using Add New Template. Administrator can assign ACL templates at the same time to assign rights to the users.

## Manage WorkViews

**WorkViews** are snapshot of the workflow at any given point in time. Administrators can create, modify and delete **WorkViews** using **Manage WorkViews** tool.

The screenshot shows the 'Control Panel > Manage WorkViews' interface. It features a header bar with the title and a sub-header 'Manage WorkViews' with the instruction 'Please click to modify WorkViews'. Below this is a table with two columns: 'Name' and 'Description'. A single row is visible with the name 'Some Name' and description 'This is my view of Claims'. At the bottom of the table, there are two buttons: 'Delete View(s)' and 'Add WorkView'.

	Name	Description
<input type="checkbox"/>	Some Name	This is my view of Claims

[Delete View\(s\)](#) [Add WorkView](#)

To create a **WorkView** click on Add WorkView button on the screen, New **WorkView** screen will appear.

The screenshot shows the 'Control Panel > Manage WorkViews > Add WorkView' form. It has a header bar with the title and a sub-header 'Select template to add WorkView'. The form contains several fields: 'Available Templates' (a dropdown menu showing 'Claims / ISIF'), 'Name' (text input '1WEEK\_TASK'), 'Description' (text input 'My one week pending task'), 'PatName' (text input), 'Sex' (text input), 'STARTED' (dropdown menu showing 'This week'), and 'COMPLETED' (dropdown menu showing 'Not yet'). At the bottom, there are two buttons: 'Save WorkView' and 'Reset'.

Available Templates	Claims / ISIF
Name	1WEEK_TASK
Description	My one week pending task
PatName	
Sex	
STARTED	This week
COMPLETED	Not yet

[Save WorkView](#) [Reset](#)

Enter required details and click on submit button to save changes. Users with read permission will get to access these **WorkViews** once they login to EDMC

## Manage Workflow Indexes

Workflow Indexes can be created, modified or deleted using Manage Workflow Indexes module. To access this tool, select **Manage Workflow Indexes** from **Control Panel**.

Control Panel > Manage Indexes

**Manage Indexes**  
Please select template and then click on the index names to modify it.

Available Templates:

Index Column Id	Index Column Name	Is Searchable
WF_Field1	FIRST FIELD	<input type="checkbox"/>
WF_Field2	SECOND FIELD	<input type="checkbox"/>
ClaimType	CLAIM TYPE	<input type="checkbox"/>
IdNumber	ID NUMBER	<input type="checkbox"/>
PatName	PATIENT NAME	<input checked="" type="checkbox"/>
DoB	DATE OF BIRTH	<input type="checkbox"/>
Sex	SEX	<input checked="" type="checkbox"/>
ClaimAmt	CLAIM AMOUNT	<input type="checkbox"/>

Select the workflow template for which you want to manage indexes and index list dialog will appear. Click on the index name to modify the index details. Administrator can set an index searchable so that users can search workflow cases using it.

Indexes set for search will also appear while creating **WorkViews**

Control Panel > Manage Indexes > Modify Index

**Modify Indexes**

Please enter details below.

Template Name	ISIF
Index Column Id	ClaimType
Index Column Name	<input type="text" value="Claim Type"/>
Index field type	<input type="text" value="Uppercase"/>
Display	<input type="radio"/> Textbox <input type="radio"/> Radio <input type="radio"/> Drop down list
Initial Value	<input type="text"/>
Length	<input type="text" value="20"/>
Is Searchable	<input checked="" type="radio"/> Yes <input type="radio"/> No

## Manage Global Settings

System Administrator can use this tool to modify settings of the entire server. **Manage Global Settings** tool can be used to modify database and mail server settings

**Control Panel > Manage Global Settings**

**Manage Global Settings**

**Database Settings**

Enter Database Server	LOCALHOST
Select Database Platform	Microsoft SQL Server
Enter Database Name	KRYSTALDB2
Enter Database UserName	KRYSTALDBO
Enter Database Password	*****
Enter Database Port	1433

**Server Settings**

Enter Server Port	80
SMTP Relay Host	smtp.anysys.com
SMTP From Address	workflow@primeleaf.in

**Other Settings**

Allow Auto Login	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable File Logging	<input type="radio"/> Yes <input checked="" type="radio"/> No
Enable Work Flow	<input checked="" type="radio"/> Yes <input type="radio"/> No
Always Show Hitlist	<input checked="" type="radio"/> Yes <input type="radio"/> No
Open Documents In New Window	<input checked="" type="radio"/> Yes <input type="radio"/> No

## Manage Jobs

Manage Jobs tool allows administrators to manage various scheduled jobs of **Krystal™ EDMS**.

**Import Monitor** and **Retention Processor** are two main Jobs of the system. Administrators can enable other predefined schedule jobs by using this tool.

**Control Panel > Manage Jobs**

**Manage Jobs**  
Please click on the Job Name to modify it.

	Job Name	Job Type	Schedule Mode	Job Parameters
<input type="checkbox"/>	Import monitor	IMPMON	Startup	C:\Products Sources\EDMS Server/upload

Job parameters and scheduling information can be modified by clicking on the job name, following is the screen which will be displayed when administrator want to modify the **Import Monitor**

Control Panel > Manage Jobs > Modify Job	
Modify Job	
<b>General Information</b>	
Enter Job Description	<input type="text" value="Import monitor"/>
Job Type	<b>IMPMON</b>
Schedule Mode	<input type="text" value="Startup"/> ▼
Job Parameters	<input type="text" value="C:\Products Sources\EDMS Server/uplo"/>
<b>Schedule Information</b>	
Days of week	<input type="text" value="Sunday"/> <input type="text" value="Monday"/> <input type="text" value="Tuesday"/> <input type="text" value="Wednesday"/> <input type="text" value="Thursday"/> <input type="text" value="Friday"/> <input type="text" value="Saturday"/>
Started	<input type="text"/>
End Time	<input type="text"/>
Frequency	<input type="text" value="0"/>
<input type="button" value="Update"/> <input type="button" value="Reset"/>	

Administrator can make required changes and can click on **Update** button to save the changes.

## Import Monitor

Import Monitor is a module which allows Administrators to import documents into **Krystal™ EDMS** as a batch. Using Krystal™ CAPTURE Studio users can scan, index and release documents to Krystal™ EDMS.

Documents created using **Krystal™ CAPTURE** Studio gets imported by import monitor into **Krystal™ EDMS**. The location which the **Import Monitor** monitors can be configured using the Manage Job module and modifying the Job parameter string. Import Monitor can monitor multiple paths if they are separated by a (; semicolon).

## Retention Processor

This process is used for document retention purposes. Retention Policies which are defined and applied to document classes gets processed by **Retention Processor**. **ADMINISTRATOR** can schedule when to **run** Retention Processor using Manage Jobs administrative module.

## Workflow Process Management

Every organization worldwide documents processes by which it conducts business. Each process comprises of activities performed by entities in a manner most efficient for an organization with the use of minimal resources. Each activity can parallel or sequential activity. Processes require superior process knowledge and tight supervision in a manual world. But as the complexity increases, so does the cost and labor. Process involving interaction between various division and departments, invariably involve extended completion time.

**Krystal™ Workflow** tries to eliminate the deficiencies associated with a complex business process. It automates the management of activities and distribution of tasks to different entities. It monitors and schedules tasks over the life of a process. Each task can have an associated content in the form of document, information, issues, tasks, work orders bug/defect and reports. It has an inbuilt time mechanism which makes notification and escalation of tasks very efficient.

**Krystal™ Workflow** consists of two basic parts;

### Krystal Modelling Component

Modelling component enables analysts to define processes and activities and assign them to various performers including system users and groups. System activities can be configured to have an application which can exchange information with external systems. One can also define the interaction between various activities including use of triggers and notifications. Process is modeled using XPDL, a standard defined by 'The Workflow Management Coalition (WFMC)'.

### Krystal Execution Component





The execution component provides an execution environment for the process designed by the modeling component. It also provides an interface for end-users for completing their tasks. The execution component can be seen as sitting on top of other systems in an organization often exchanging information with them. It is responsible for a number of functions like authorization, authentication, scheduling, monitoring, event processing, queues, prioritization, escalation, load balancing, and task termination and auditing.

### Workflow Queues

Workflow Queues or work queues are represented by username, groups and roles to which user belong. Each queue consists of work items or work cases. If workflow access is enabled for a user then all the queues for users will appear on My Workspace module.



#### Work Queues

	Rahul Kubadia
	Document Managers
	Administrators
	DMS Users

On clicking on the particular queue, work cases assigned to that queue will be displayed as a hit list. The size of hit list is restricted by user preferences.

Task List For Claims Administrator <span style="float: right;">?</span>					
Following is the list of tasks assigned to <b>Claims Administrator</b>					
	Id	Name	Procedure	Priority	Started
	1-1	View Claim	ISIF	89	05/04/06 14:29
	1-2	View Claim	ISIF	89	05/04/06 14:29
	1-3	View Claim	ISIF	89	05/04/06 14:29
	1-4	View Claim	ISIF	89	05/04/06 14:29
	1-5	View Claim	ISIF	89	05/04/06 14:29
	1-6	View Claim	ISIF	89	05/04/06 14:29
	1-7	View Claim	ISIF	89	05/04/06 14:29
	1-8	View Claim	ISIF	89	05/04/06 14:29
	1-9	View Claim	ISIF	89	05/04/06 14:29
	1-10	View Claim	ISIF	89	05/04/06 14:29

1 2 3 4 5 6 7 8 9 10

### Workflow Cases

An executing instance of a **Workflow** model is called a **Case** or *process instance*. There may be multiple cases of a particular **workflow** model running simultaneously, however each of these is assumed to have an independent existence and they typically execute without reference to each other.

Once the user has clicked the work queues, all the cases in that queue are displayed. User can view the case by clicking on action and then selecting option. This will open the workflow case.

Cancel Save Action [v] Done

Name : View Claim

Id : 1-2 Priority : 89 Started : 05/04/06 14:29

Comment : [Text Area] View Document

Claim Type	OTHER	Id Number	554319343
Patient Name	STERNARD WENDY		
Claim Amount	93.00		
Date of Birth	9/10/1963		
Sex	F		

The workflow case displays the details of the task on the left panel with a button that allows user to view the associated document. User can take action on the form displayed on the left panel.

If user closes the window without making any changes or taking any action then the case is locked by system. Only user with administrative privileges can unlock the case.

## WorkViews

Predefined workflow searches are known as **WorkViews**. Administrators can create any number of **WorkViews** on a particular workflow template by assigning multiple search criteria.

Users who have read permissions on these **WorkViews** can only view it. It is similar to searching work cases. All **WorkViews** to which user have access permissions are displayed on My Workspace.



### WorkViews

This Years Claims

My WorkView

All cases which qualifies the pre-defined search criteria are displayed when a **WorkView** is accessed by user



## Utilities

This section details Utilities available to the user of **Krystal™ EDMS**



### Utilities

	Search Journal Notes
	View Logs
	Preferences
	Change Password

## Bookmarks

Users can mark a document for quick access using Bookmarks. From the document hit list user can select action and give a name for the bookmark. The document is then bookmarked and is listed on the **My Workspace**





### Bookmarks

	Scan Shop Invoice
	HPCL Proposal For Tade Data System
	Configure Bookmarks

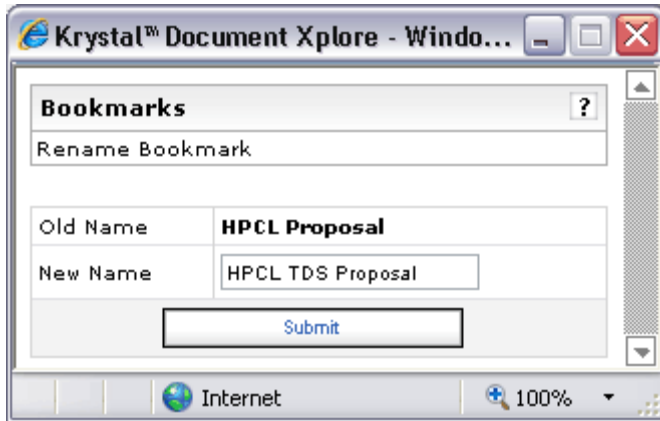
Users can modify, rename, delete bookmarks using Configure Bookmarks link from **My Workspace**

**My Workspace > Configure Bookmarks** ?

**Configure Bookmarks**  
This module will allow you to configure your bookmarks.

	<b>Bookmark name</b>	<b>Action</b>
<input type="checkbox"/>	 HPCL Proposal	Rename
<input type="checkbox"/>	 Try Research March Invoice	Rename


On clicking the rename link a pop up will be displayed as shown below

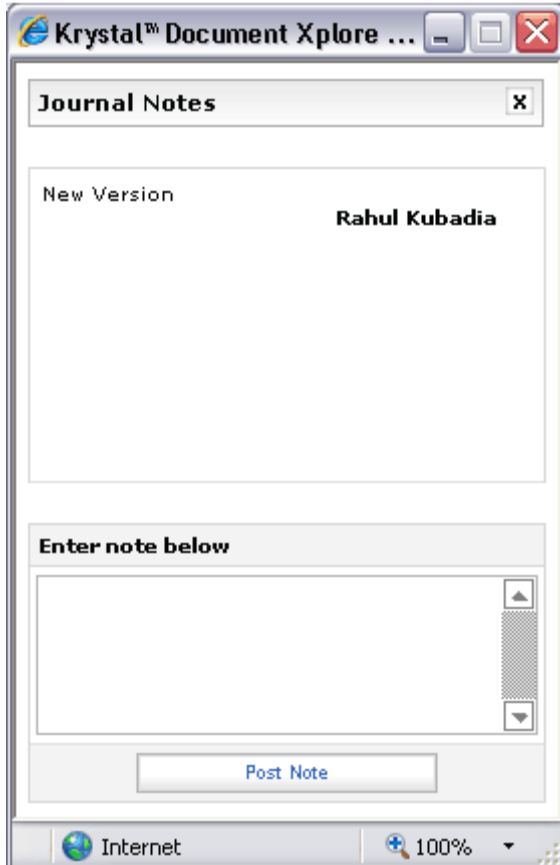


User can save renamed bookmark by clicking on the **Submit** button.

## **Journal Notes**

A **Journal Note** is a type of annotation that can be put on the document. And it remains through out the life span of the document. Journal Notes cannot be modified or deleted by users. Only Administrators can delete journal notes or the users who have created journal notes can delete it.

Unlike other annotations, journal notes are not based on the revisions of the document, it is available for all the revisions of the document. If document contains Journal Note(s) then it is displayed in the center column of the Annotations column of the document hit list. To view the **Journal Note** annotation click on  following popup will be displayed



Users can use **Search Journal Notes** utility from **My Workspace** to search Journal notes by particular user, on particular document class.

**My Workspace > Search Journal Notes** ?

**Search Journal Notes**  
Please select document classes and users on the list below and enter the search term.

---

**Enter Search Criteria**

Please enter search text.

Document Class

- Data Sheets
- Invoice**
- Multipage Tiffs
- Purchase Orders
- Proposals
- Shipping Confirmation









Posted By

- Administrator
- Pooja Kubadia
- Prajakta Mule
- Abhijit Shetye
- Rahul Kubadia**
- Dharmesh Modi

The resultant hit list displays the list of documents which contains the journal notes matching the search criteria.

**My Workspace > Search Journal Notes > Search Results** ?

**Search Results**

Action	Document Class	Note	Posted On	Posted By
  	Invoice	New Version Added	07/25/06 13:35	 Rahul Kubadia
  	Invoice	New Version	07/25/06 14:16	 Rahul Kubadia

## Preferences

Users of **Krystal™ EDMS** can customize various settings using this module. This module allows user to set following preferences

- General Preferences
- Document Window Preferences
- Workflow Form Preferences
- Revision Control Preferences
- Hit list Column Preferences

My Workspace > Preferences <span style="float: right;">?</span>	
This module helps you to set your Preferences.	
General Preferences	
No of Hits per page	<input type="radio"/> 5 <input checked="" type="radio"/> 10 <input type="radio"/> 25 <input type="radio"/> 100
Document Window Preferences	
Alignment	<input type="radio"/> Left <input type="radio"/> Right <input type="radio"/> Full Screen
Width	<input type="text"/>
Height	<input type="text"/>
Workflow Form Preferences	
Alignment	<input type="radio"/> Left <input type="radio"/> Right
Width	<input type="text"/>
Height	<input type="text"/>
Revision Control Preferences	
Checkout Directory	<input type="text" value="C:\TEMP"/>
Hitlist Column Preferences	
Select Hitlist Columns	<input checked="" type="checkbox"/> Created <input checked="" type="checkbox"/> Created By <input checked="" type="checkbox"/> File Size <input checked="" type="checkbox"/> Revision Id
<input type="button" value="Save"/> <input type="button" value="Reset"/>	

To save the preferences click on **Save** button.

## Change Password

Change password utility will help user to change his / her password. If user is authenticated against Active Directory / LDAP Server then he / she will not be allowed to use this utility.

My Workspace > Change Password <span style="float: right;">?</span>	
<b>Current Password</b>	
This module helps the User to change the Password.	
Enter Password	
Current Password	<input type="password" value="*****"/>
New Password	<input type="password" value="*****"/>
Confirm Password	<input type="password" value="*****"/>
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

Administrators can change password of any user using Manage User -> Change Password functions from Control Panel