



Administration User Guide

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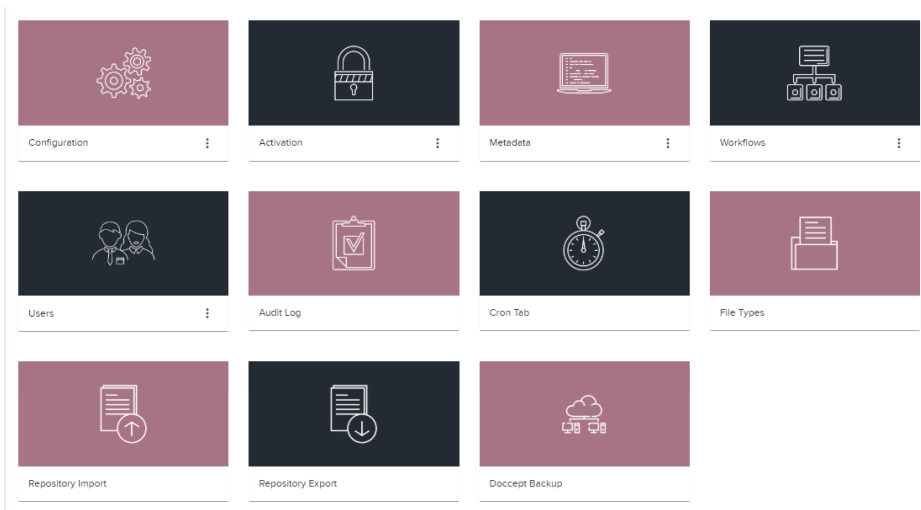
BACKUP PROCESS30

INTRODUCTION

This document provides the Deployment Environment details required as part of installation of Doccept – Integrated Document Management.

DOCCEPT ADMINISTRATION

ADMINISTRATION DASHBOARD

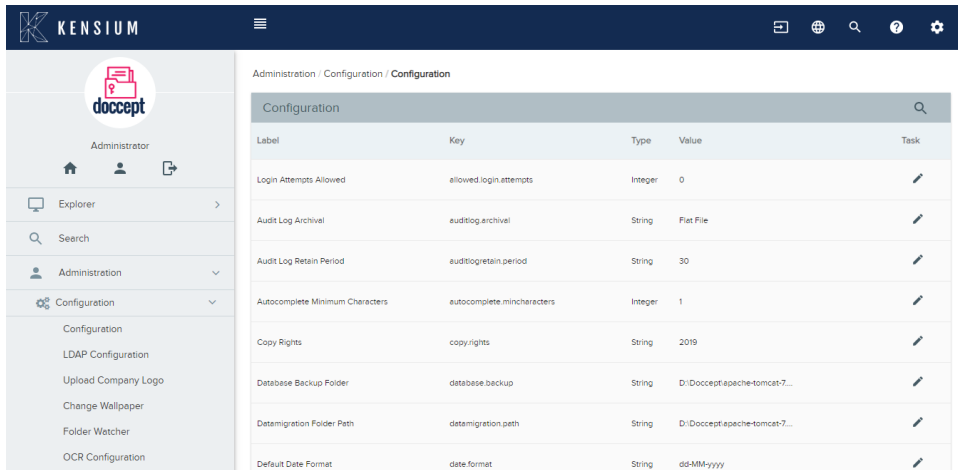


Doccept administration provides the following Administrative activities:

1. Doccept Configuration
2. License Activation
3. Defining File Types handled by Doccept
4. Metadata
5. Workflow Definitions
6. User Management
7. Auditing users (track log)
8. Managing Cron (Scheduled) jobs
9. Repository Import/ Export
10. Backup Process

Importing and exporting of data from your server

CONFIGURATION



Label	Key	Type	Value	Task
Login Attempts Allowed	allowed.login.attempts	Integer	0	
Audit Log Archival	auditlog.archival	String	Flat File	
Audit Log Retain Period	auditlogretain.period	String	30	
Autocomplete Minimum Characters	autocomplete.mincharacters	Integer	1	
Copy Rights	copy.rights	String	2019	
Database Backup Folder	database.backup	String	D:\Doccept\apache-tomcat-7...	
Detamigration Folder Path	detamigration.path	String	D:\Doccept\apache-tomcat-7...	
Default Date Format	date.format	String	dd-MM-yyyy	

In configuration view, an administrator can see the parameters that have been loaded during Doccept start up. This can be of special interest when something has been changed in 'doccept.cfg', and to see if the parameters have loaded correctly during the startup sequence. Action Menu consists of the Edit functionality. Administrator can modify the configuration parameters.

Configuring Audit Log retaining Period:

The following configuration items need to be updated to configure Audit log retaining period in Doccept:

- Audit Log Archival: This may be as a flat file or database. Default value is flat file.
- Audit Log Retain Period: Period of retention on the Audit log records. Default value is 30 days.

Configuring Database Backup:

The following configuration items need to be updated to configure Database backup in Doccept:

Database Backup Folder: Specify the Folder (on the Doccept Server) where the automatic database backup dump files will be stored.

Configuring Date Format:

The following configuration items need to be updated to configure Date format in Doccept:

- Default date format: Specify the date format that will be applicable for all dates displayed across Doccept.

Configuring Maximum File Size:

The following configuration items need to be updated to configure Maximum File Size allowed in Doccept:

Maximum file size allowed:

Configuring OCR Engine:

The following configuration items need to be updated to configure OCR Engine in Doccept:

- OCR setup: Specify the installation path for the OCR engines either Cuneiform (Ubuntu) and Tesseract (Windows)
- OCR applicable file types: Mention the file extensions for the file types which can be OCRed.
- OCR extraction Mode: This could be Auto (default setting) or Manual. If set to Auto mode every file uploaded to Doccept is automatically OCRed else user has to explicitly run the “Extract OCR text” function on the specific file.
- OCR rotate setup: Specify the rotate parameters for the OCRed document.

Configuring Document Preview related tools:

The following configuration items need to be updated to configure Preview tool in Doccept:

- SWF Tools Setup: Specify the installation path of SWFTools (i.e., pdf2swf.exe).
- ImageMagick Setup: Specify the installation path for ImageMagick tool.
- Openoffice path: Specify the installation path for Open Office.
- Openoffice port: Specify the Port configured for the headless service of Open Office tools
- Openoffice tasks: Specify the number of tasks that can be handled by the Open Office service.

Configuring Password Rules:

The following configuration items need to be updated to configure Password rules in Doccept:

- Password Max Length: Specify the Maximum length allowed for the password. Default value is 0 – unlimited.
- Password Min Digits: Specify the Minimum digits allowed in the password. Default value is 0 – unlimited.
- Password Min Length: Specify the Minimum length allowed for the password. Default value is 0 – unlimited.
- Password min lowercase chars: Specify the Minimum lower case characters allowed in the password. Default value is 0 – unlimited.
- Password min uppercase chars: Specify the Minimum upper case characters allowed in the password. Default value is 0 – unlimited.
- Password min special: Specify the Minimum special case characters allowed in the password. Default value is 0 – unlimited.

UPLOAD COMPANY LOGO

An administrator can upload the client/company logo from configuration page. The uploaded logo is reflected in the header and login page of the application



CHANGE WALLPAPER



Change wallpaper allow user / administrator to change background of login page.

LDAP CONFIGURATION

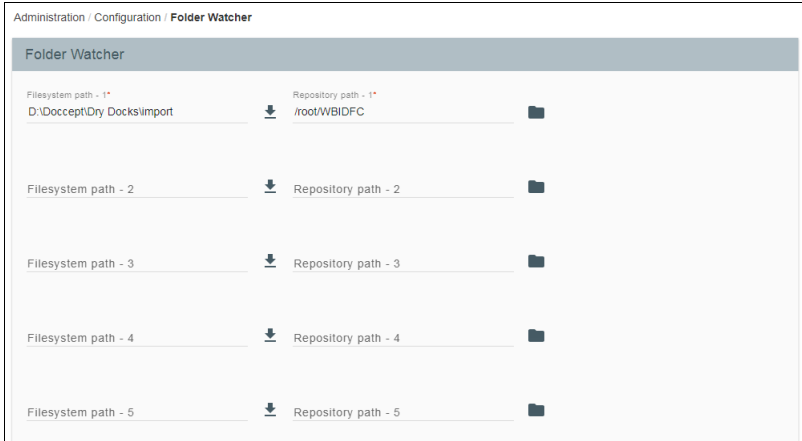
LDAP/ Active Directory authentication can be setup using this configuration page. This enables single signoff option for Doccept. The users created on the "Users Management" is ignored and the users defined in LDAP/ AD structure are mapped to Doccept.



FOLDER WATCHER

Folder watcher feature enables users to map predefined "Hot folders" (mostly network folders) as input folders with respective Doccept folders.

Admin can configure up to 10 hot folders using this feature.



LICENSE ACTIVATION

Docept Licensing can be managed from here. Upon user registration, the license key is generated and applied by the admin to grant access to the registered user after verification and approval by the admin. Docept initially runs on a Base license which is activated during installation which is valid for 15 days from the date of installation.

ACTIVATION

If the user has not procured a valid docept license he can register for a valid license through License registration page. A request is forwarded to the Docept Support group through email on the user enters the docept licensing information in the registration form and submits.



REGISTRATION

Once a valid license is activated an automatic license activation key is sent to the client on his emailed mentioned in the License registration form.



METADATA

To add or delete a group of properties to a document as needed. This is the section to add custom Meta tags or properties to documents and folders.

- Metadata Summary
- Folder Mapping
- File Type Mapping

METADATA SUMMARY

The 'Metadata Summary' page will be display all the groups defined in the application.

The Action menu consists of 3 options:

- Edit

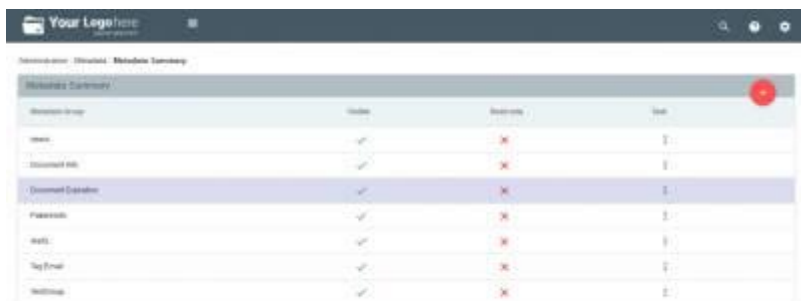
When the Administrator performs edit operation the system should display the existing field description and allow the user to make changes by deleting / adding fields or editing the properties of the existing ones.

- View

On selecting the view Registered group properties are shown In Metadata view in a light box with the values of the selected key will be displayed.

- Delete

On selecting the Delete option deletes the Property group from the list.



Metadata Group	Status	Actions	Use
Meta	✓	✖	1
Document ID	✓	✖	1
Document Creation	✓	✖	1
Metadata	✓	✖	1
URL	✓	✖	1
Tag Email	✓	✖	1
Metadata	✓	✖	1

Select Destination Folder ✕

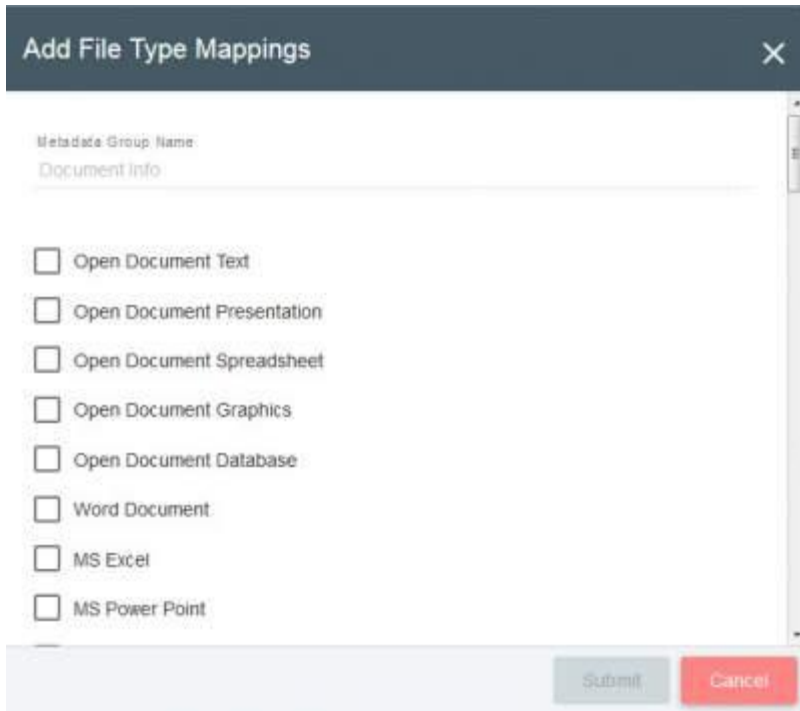
Metadata Group Name

Document info

- root
 - abc
 - Test0001
 - Test10
 - Test11
 - Test111
 - Test19
 - Test20
 - Test20000
 - test3
 - Test4
 - Test5
 - Test7
 - Test9

FILE TYPE MAPPINGS

Here admin can assign the existing property groups to the specific file types defined in the application. or admin can add Add File Type Mapping and assign it to the specific File Types. Admin can edit this assigned property group and also delete the assigned property.



When a file with a File type that has been mapped to a Metadata will inherit that Metadata irrespective of the location of that file.

Scenario for Metadata Mapping:

- If two metadata groups are created namely “MD1” and “MD2”
- If MD1 is mapped for “Folder1” and “MD2” is mapped to “PDF files”.
- All files upload to Folder1 irrespective of the file types will inherit “MD1” metadata.
- PDF files uploaded to Folder1 will inherit “MD1” from its parent folder and also “MD2” as per file type mapping.
- PDF files uploaded to Folder 2 will inherit “MD2” as per the file type mapping, rest of the file will not inherit any Metadata.
- If PDF file is moved from Folder2 to Folder1 it will inherit the metadata of the new destination folder.

METADATA UPLOAD

Custom metadata values can be uploaded for bulk files using the mapping CSV files

WORKFLOWS

In the workflow view, the administrator can add, delete or update workflow definitions. Administrators can see the workflow process and status. In this view, you can upload a new workflow definition (.par file).



The workflow status and the workflows that are currently active can be seen. Each process can be edited to change, assign variables, modify some data, and see its actual state etc.

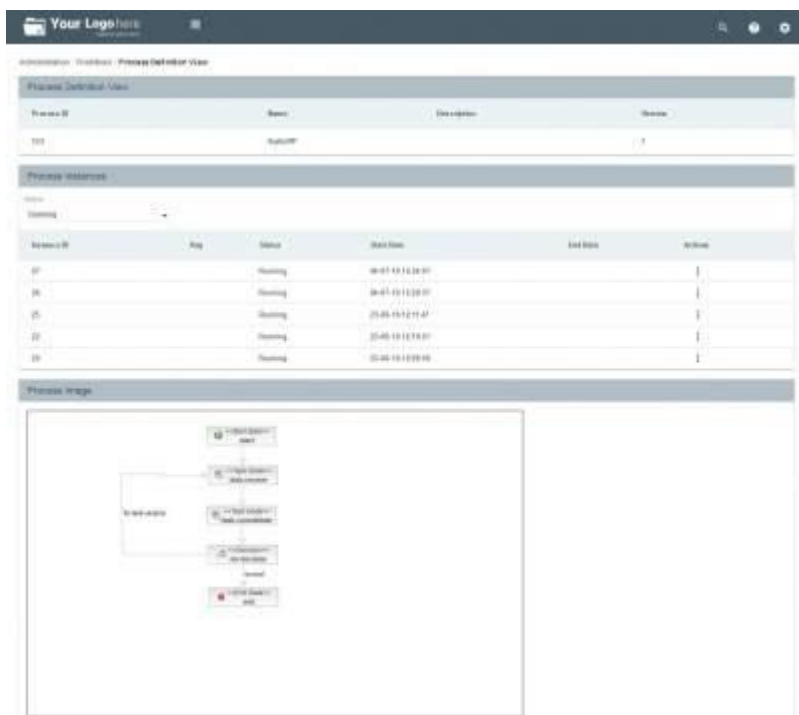
The Action menu consists of 2 options.

Examine

Examine work flow feature ‘ ’ enables the admin to review the status of the work flow and to assign respective users. It redirects to Process definition View.

Delete

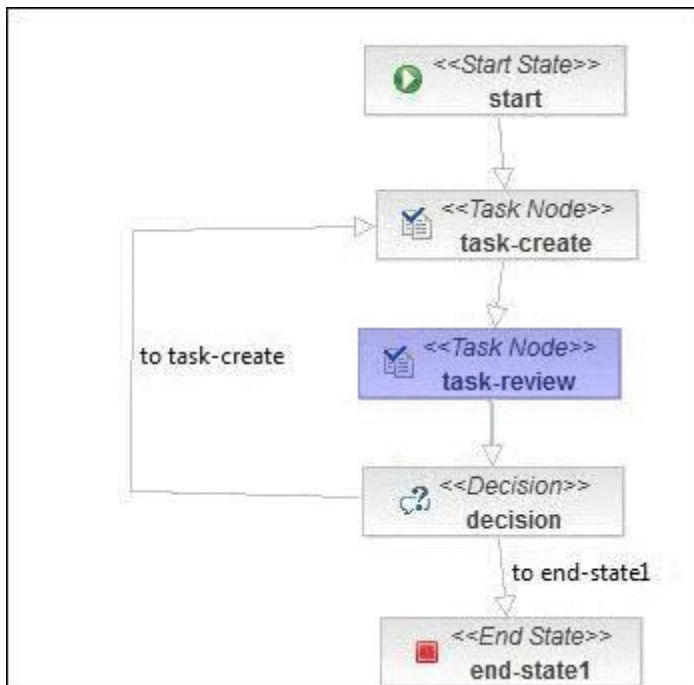
Delete work flow feature deletes the respective Workflow. Confirmation alert will be displayed to the user before the deleting the workflow



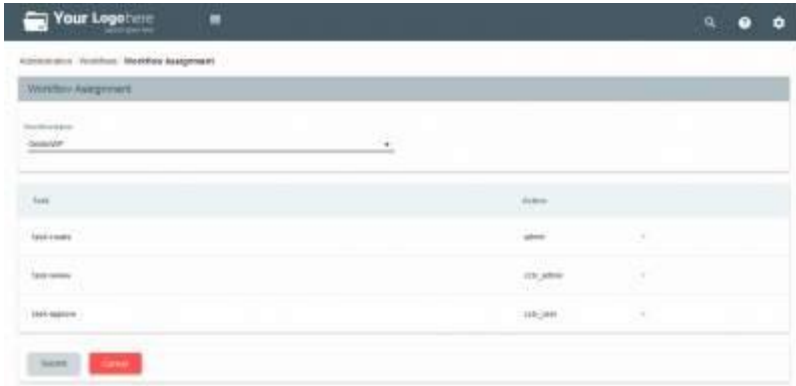
Admin can view task instances and also perform options like Suspend , end respective workflow



Admin can view/monitor the token stage of respective process flow and the below screen shows respective status in form of a chart.



WORKFLOW ASSIGNMENT



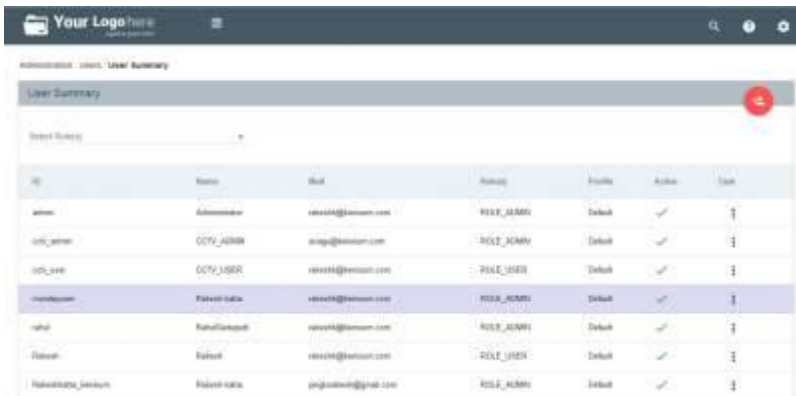
The screenshot shows a form titled "Workflow Assignment" with a breadcrumb trail: Administration > Workflow > Workflow Assignment. Below the title is a "Workflow" dropdown menu. The form contains several input fields:

- Role:** A dropdown menu with "Admin" selected.
- User name:** A text input field containing "ccv_admin".
- User email:** A text input field containing "ccv_admin".
- User phone:** A text input field containing "118-244".

At the bottom of the form are two buttons: "Save" and "Cancel".

USERS

USERS SUMMARY



The screenshot shows a table titled "User Summary" with a breadcrumb trail: Administration > Users > User Summary. A "Select Group" dropdown is at the top left. A red notification badge is in the top right corner. The table has the following columns: ID, Name, Mail, Role, Profile, Action, and Task. The data rows are as follows:

ID	Name	Mail	Role	Profile	Action	Task
admin	Administrator	admin@doccept.com	ROLE_ADMIN	Default	✓	⌵
ccv_admin	CCV_ADMIN	ccv@doccept.com	ROLE_ADMIN	Default	✓	⌵
ccv_user	CCV_USER	ccv@doccept.com	ROLE_USER	Default	✓	⌵
hradmin	HRAdmin	hradmin@doccept.com	ROLE_ADMIN	Default	✓	⌵
hrhr	HRAdmin	hrhr@doccept.com	ROLE_ADMIN	Default	✓	⌵
hruser	HRUser	hruser@doccept.com	ROLE_USER	Default	✓	⌵
hradmin@doccept.com	HRAdmin	hradmin@doccept.com	ROLE_ADMIN	Default	✓	⌵

With User administration view, you can create, update, delete, enable and disable users' accounts and assign several mail addresses and accounts.

Detail of the functions and respective icons:

- Add User
- User Enabled
- User Disabled

Action Menu

Edit user: Administrator can modify the user details.

Delete user: Administrator can delete the users from the grid.

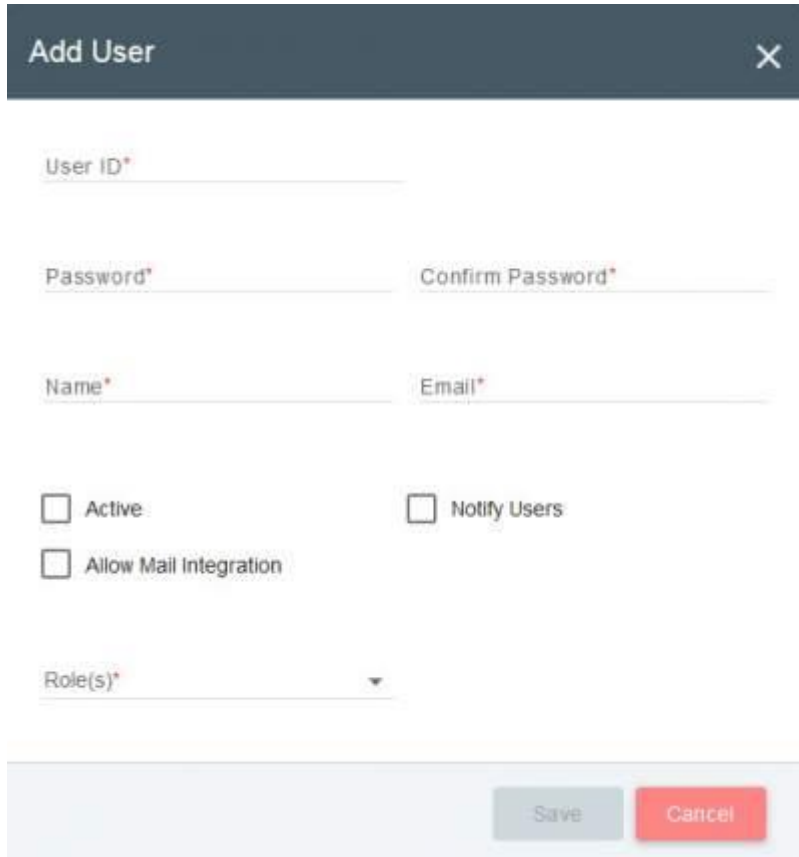
User Config: Administrator can assign the profile to users.

- Mail accounts: To configure the user mail account. This is displayed in the list when the user checks the option Allow Mail Integration check box while creating User.

In the main user administration view, we can take a quick look of actual users.

Add User

To create a new user click on Add User icon:



The image shows a modal window titled "Add User" with a close button (X) in the top right corner. The form contains the following fields and options:

- User ID* (text input)
- Password* (text input) and Confirm Password* (text input)
- Name* (text input) and Email* (text input)
- Active
- Notify Users
- Allow Mail Integration
- Role(s)* (dropdown menu)

At the bottom right of the modal, there are two buttons: "Save" (grey) and "Cancel" (red).

Edit User

To Edit the User information click on the Edit menu item in Actions Menu:

Edit User ✕

User ID*
sivag

Password* Confirm Password*

Name* Email*
siva sivagu@kensium.com

Auth Token
kEMDYmp9gxRv7ZxZm4TK2gutQWio5wh0Z.lqD3BXAvNdU=

Active Notify Users
 Allow Mail Integration

Role(s)*
ROLE_ADMIN

Update Cancel

User Config

User Config allow the user to be mapped to specific User Profile (as defined under User Profiles section):

Edit user config ✕

Default

Save Cancel

User Mail Accounts

Displays the all Mail accounts configured for the users in the application.



More

Edit

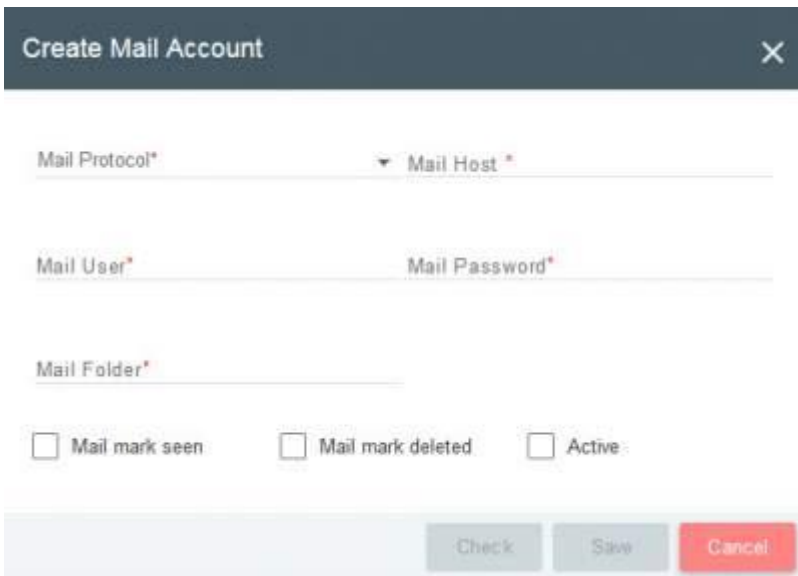
Administrator can modify the user mail configuration.

Delete

Administrator can delete the mail accounts of the user.

To insert a new mail user account click on the new mail account icon:

Admin can configure mail account information like mail protocol, user mail address, host server, mail server, password, IMAP folder details, read write permissions etc



Create Mail Account [X]

Mail Protocol* Mail Host *

Mail User* Mail Password*

Mail Folder*

Mail mark seen Mail mark deleted Active

Check Save Cancel

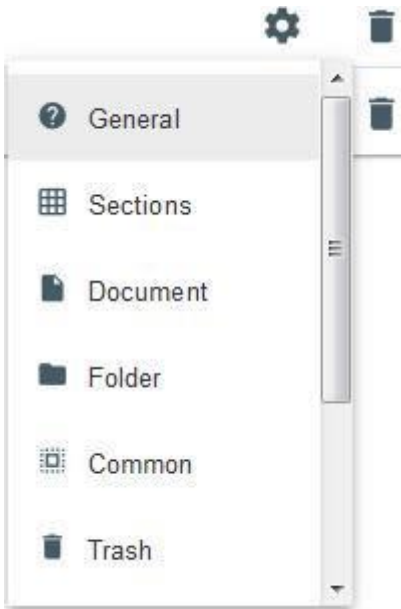
LOGGED USERS

In Doccept, logged users administrator can see currently logged-in users. It shows the user token (unique session identifier), the date & time when a user has logged and the last user date & time.



Manage Menu consists following links:

- General
- Sections
- Documents
- Folders
- Common
- Trash
- Mail
- Delete




Manage General

Administrator can modify the Name of the profile and to select the status Active/Inactive, he can also change quota limit.

Manage General ×

Name*
cctv_admin

Active

Quota limit (MB)
10 

Manage Sections

Enable or disable particular stacks to categorize the user profile based in the department/Role it belongs to e.g.: Categories, Templates, Mail and Trash.

Manage Sections ×

Select All

Categories

Templates

Mail

Trash

Manage Documents

Enable or disable the permission at file level to have access like Edit, Download, etc... Can be managed by administrator at Manage Documents level

Manage Document ✕

- Select All
- Download
- Edit
- Update New Version
- Unlock
- Download PDF
- Send Document as Attachment
- Security
- History
- Preview
- Audit Log
- Add Category
- Add Keyword
- Start Workflow
- Restore Version
- Export to Word
- Update
- Cancel Edit
- Lock
- Create Link
- Send Document as Link
- Properties
- Notes
- Version Download
- Print Visible
- Work Flow Log
- Remove Category
- Remove Keyword
- Create From Template
- Sign Document
- Export to Excel

Manage Folders

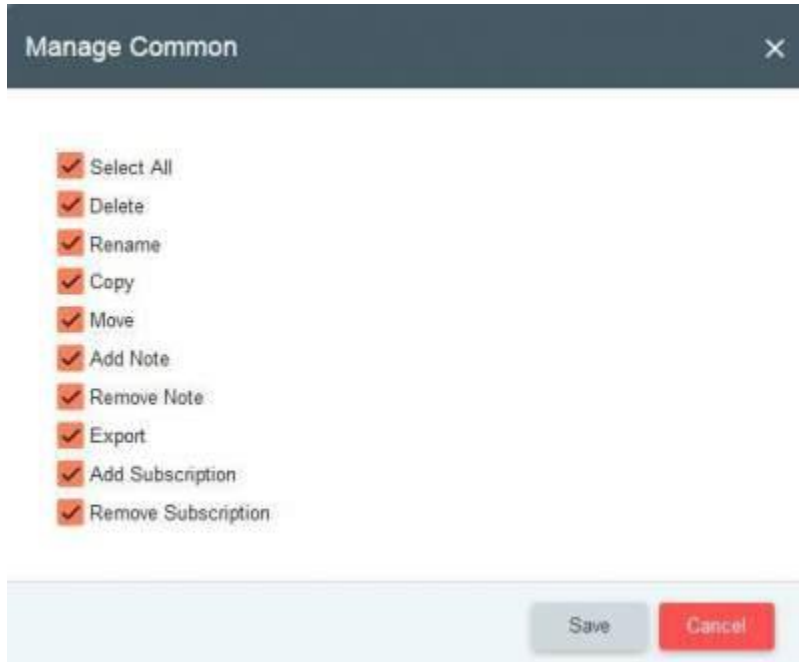
Enable or Disable permissions at folder level like Notes, Security, etc., Can be managed by administrator at Manage Folders level

Manage Folder ✕

- Select All
- Manage Folder
- Add Document
- Scanner
- Properties
- Security
- Notes
- Group check-in
- Create Folder on Root
- Copy to Root
- Move to Root
- File Count

Manage Common

Enable or Disable permissions common to folder and file level to have access to Delete, Rename etc. Can be managed by administrator at Manage Common level.



Manage Common

- Select All
- Delete
- Rename
- Copy
- Move
- Add Note
- Remove Note
- Export
- Add Subscription
- Remove Subscription

Save Cancel

Manage Trash

Enable or disable the Trash related permissions at folder and file level to have access to pure, purge trash, restore can be manage by administrator at this level



Manage Trash

- Select All
- Purge
- Purge Trash
- Restore

Save Cancel

Manage mails

Enable or disable the permissions related the Mails can be managed by administrator at this level.

Manage Mail ✕

- Select All
- Properties
- View
- Security
- Notes

Save Cancel

USER ROLES

Shows the roles defined by the administrator.

More

Edit: Administrator can modify the user role as active/inactive

Delete: Administrator can delete the role from the role list.

To create a new role click on Add Role icon:

Add Role ✕

Id*
ADMIN

Active

Save Cancel

Note: While user can be assigned to any new role, each user should be assigned the roles of ROLE_USER or ROLE_ADMIN to log into Doccept

ROLE MAPPING

Shows the roles defined by the administrator. Allow Admin to map a Role to multiple users.

Administration / Users / Roles Mapping

Roles Mapping

Role(s)
Finance_Group Edit Role Mapping

Id	Name	Mail	Role(s)
fin_user	Fin User	finance@test.com	Finance_Group ROLE_USER

Edit Role Mapping : Finance_Group ×

Select All

admin

fin_user

mgr

Map Cancel

PROFILE MAPPING

Shows the profiles defined by the administrator. Allow Admin to map a Profile to multiple users.

Profile Mapping			
Profiles			
myprofile		Edit Profile Mapping	
Id	Name	Mail	Profile
admin_user	Admin user	admin@test.com	myprofile
fin_user	Fin User	finance@test.com	myprofile
hr_user	HR User	hru@test.com	myprofile
sales_user	Sales User	sales@test.com	myprofile

Edit Profile Mapping : myprofile

- Select All
- admin
- admin_user
- fin_user
- hr_user
- mgr
- sales_user

[Map](#) [Cancel](#)


USER AUTHORIZATION REQUEST

Menu: Administration > Users > User Authorization Request

All the requests for Preview/ Download of a document are listed in this screen where the Admin user can review and approve/ reject accordingly.

On approval the expiry date is set by default for 15 days which can also be modified or changed.

User will be able to preview/ download the documents for which the request is approved and open. Once the request is expired the preview/ download option will not be available.

 Users
▼

- User Summary
- Logged Users
- User Profile
- Roles
- Roles Mapping
- Profile Mapping
- User Authorization Request

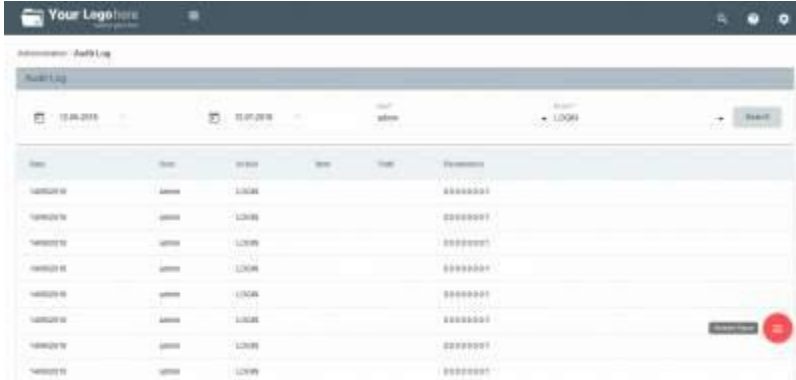
Authorization screen:

Administration / Users / **User Authorization Request**

User Authorization Request						
File Name	Requested By	Requested On	Authorization For	Action	Expiry Date	Remarks
AMA - SOP Asset.pdf	manikanta	19-02-2019 11:26:02	preview	Approved	06-03-2019 11:28:21	
Android New.txt	manikanta	19-02-2019 11:30:52	download	Rejected		You don't hav...
Doccept Estimate.xlsx	manikanta	19-02-2019 11:36:59	preview	Approved	06-03-2019 11:38:16	
New Issues.rtf	manikanta	19-02-2019 11:41:52	download	Rejected		Rejected
New Issues.rtf	manikanta	19-02-2019 11:43:30	preview	Approved		
Issues in Android.rtf	manikanta	19-02-2019 11:43:52	preview	Rejected		Rejected
Issues in Android.rtf	manikanta	19-02-2019 11:46:54	preview	Approved	06-03-2019 11:48:33	Approved
Issues in Android.rtf	manikanta	19-02-2019 11:51:13	download	Rejected		Rejected
Issues in Android.rtf	manikanta	19-02-2019 11:51:13	preview	Approved		
New Issues.rtf	manikanta	19-02-2019 11:56:45	preview	Rejected		Rejected

AUDIT LOG

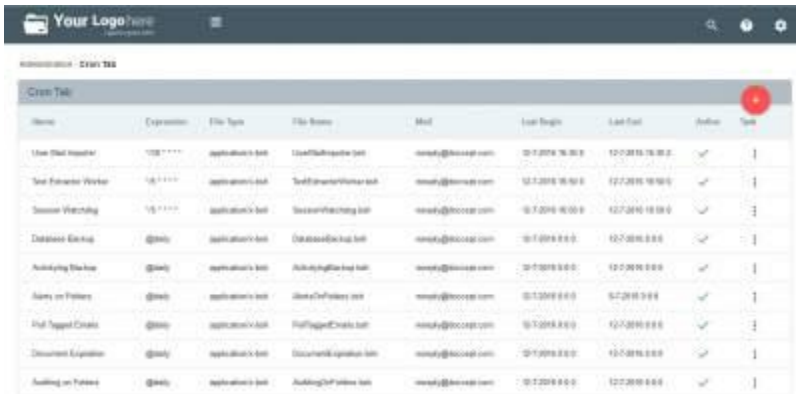
Any operation performed by a Doccept user is automatically audited in the database. This is a complete audit tracking log for any operation done in Doccept.



The screenshot shows the 'Audit Log' interface. At the top, there are filters for 'Start' (12/04/2018) and 'End' (12/07/2018), and a 'Log' dropdown menu. Below the filters is a table with columns: 'User', 'Role', 'IP', 'Web', 'Type', and 'Permissions'. The table contains several rows of data, each representing a user action. A red notification bubble is visible in the bottom right corner of the table area.

CRON TAB

With this feature you can create scheduled tasks in an easy way. On this page you can see the already registered tasks. The last start and last stop columns show the last time a task was executed. If you want to see the output of the script, you can set an email and you will be notified every time the task is executed.



The screenshot shows the 'Cron Tab' interface. It features a table with columns: 'Name', 'Expression', 'File Type', 'File Name', 'Mail', 'Last Begin', 'Last End', 'Status', and 'Edit'. The table lists several tasks such as 'User Data Import', 'User Extension Worker', 'Session Warming', 'Database Backup', 'Archiving Backup', 'Alerts on Policy', 'Full Tagged Emails', 'Document Expiration', and 'Auditing on Policy'. A red notification bubble is visible in the top right corner of the table area.

An administrator can create a new Cron job by click on the Add Cron image, popup window will displays with required fields.

REPOSITORY IMPORT

This feature is available to import a Doccept repository that was moved from another instance of Doccept. It can also be used to quickly import an entire folder structure of files that have never been imported into Doccept. Only requirement is that the repository/folder structure should be located on the server.



If you have exported with the metadata checkbox enabled, you can import the documents and folders with this data (author, creation date, etc.). If you have exported the documents history, you can also import all the document versions with this option.

REPOSITORY EXPORT

With Doccept we can export all the folder structures and documents to the server disk. Log in as admin and go to Administration > Repository Export. This operation is very easy. You simply put your Doccept origin path and a folder on the server as the destination File system path.



The metadata and history checkboxes will enable the export of the document folder metadata (author, creation date, etc.) and the whole document history.

BACKUP PROCESS

Interface to define the basic configuration settings required to setup a backup procedure:

Doccept Backup

Doccept Backup Type*
Full Backup

Filesystem path*
/home/kensium/Doccept/backuptesting

Doccept Backup Frequency*
daily

Save Reset

- **Doccept Backup Type:** Provide drop down with options “Full Backup” and “Incremental Backup” (only for windows)
- **Doccept Backup Location:** User can provide complete path of the file system location (native or network path on the host server).
- **Backup Frequency:** Provide drop down with the values Daily, Weekly and Monthly.

Functionality:

Administrator can setup an recurring backup function within the application by providing the above 3 parameters . Once setup this process will run automatically based on the frequency setup in the configuration page.

Full Backup: Application will back up the Repository folder under the tomcat server plus the database backup script plus the “Propertygroups.xml” file.

Incremental Backup: For the first time the function will perform a FULL Backup and from second time it will capture only the new files/ data from the repository and database.