



User Guide

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INTRODUCTION

PURPOSE

Welcome to the Doccept Document Management System. This User Manual contains all essential information to make full use of the Doccept Document Management System. This manual includes a description of the application functions and capabilities, contingencies and alternate modes of operation, and step-by-step procedures for access and use. This User Manual provides a detailed description of all the Doccept features including all the application functions and capabilities, contingencies and alternate modes of operation, and step-by-step procedures for access and use.

PRODUCT OVERVIEW

Doccept is multi-user document management software that allows businesses to become better organized, more secure and efficient.

- Convenience and Central Control
- User Defined Folder Structure
- Administrator Control
- User Defined Flow of Documents
- Extensive Document Search
- Template Management
- Report Generation
- Image Formats

SYSTEM ACCESS

LOGIN SCREEN



The above screen appears after successful installation of Doccept. Type the username and password as provided by the administrator and click Login. In case the username or password entered is wrong, an “authentication failed” message will be displayed.

- Facility to customize to match your website theme
- Detailed and Compact view options
- Comprehensive options to customize animation, colors, orientation and style
- All the power and flexibility of jQuery

- Easy install; 100% integration
- Facility to customize rating icons

REMEMBER ME

‘Remember me’, a user friendly feature can be enabled with the check box being selected. It saves the user details in the cache and helps in quick login each time the user visits the URL. Though it’s a feature within reach, it is not recommended to use this on a shared computer.

FORGOT PASSWORD

If a user forgets their password and is unable to log in to Doccept, the “Forgot Password” feature helps in resetting the password and gaining access to the account.



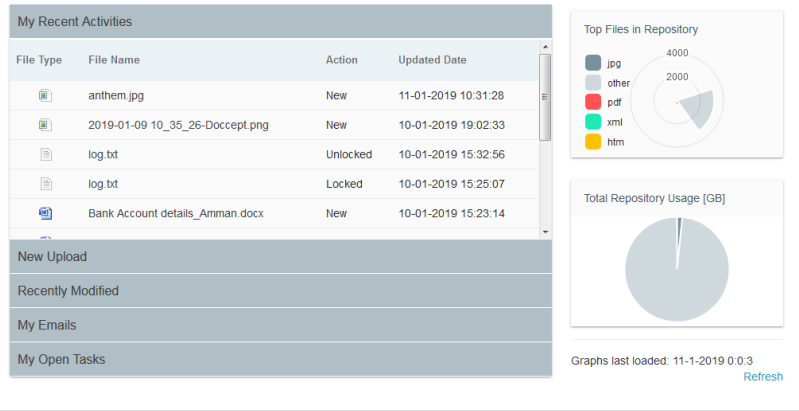
Note: Forgot Password link will not be available if Doccept is configured on LDAP/AD Single Sign-On

DOCCEPT LAYOUT

HOME SCREEN

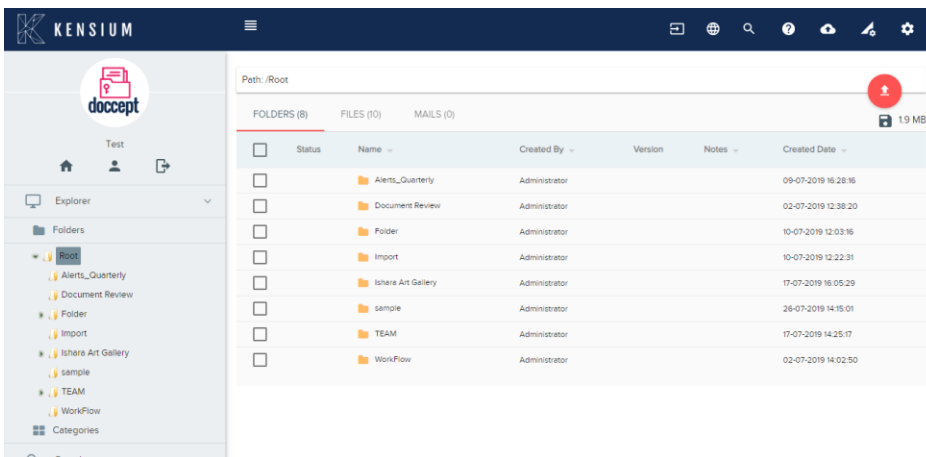
Doccept layout consists of 5 tabs, namely:

- Explorer
- Search
- Administration (Only for users with admin access.)
- Reports
- Help



- The home screen of Doccept is called the Dashboard. It is intuitive and feature rich and provides user friendly access to important information on the Home screen. This dashboard is split into two sections tabs and graphs.
- This dashboard is split into two sections tabs and graphs.
- Tabs - 5 tabs are visible on the left side of the screen and are expandable with a mouse click.
- Graphs - There are graphs on the right side of the screen in two separate blocks providing specific information and are self-explanatory.

EXPLORER SCREEN



Explorer is presented as a knowledge tree via which the company organizes its information. The side panel of the desktop offers a view of the directory structure as a tree. The right pane of the screen provides a grid view of the folder contents with detailed information like Name of the Folder, Author, version of the Artifact, Notes or brief summary, Update history and drop down options for the actions that can be taken against each artifact.

SEARCH SCREEN

Searches may be made on words in the contents of the files, the name (title) of the documents, or by the type of file (File type). Similarly, one can search via keywords defined on the files, or on files created by specific users. The results are displayed in a paginated manner.

Search Criteria

Parameter*

Operator*

Value*

Condition*

Search

Save

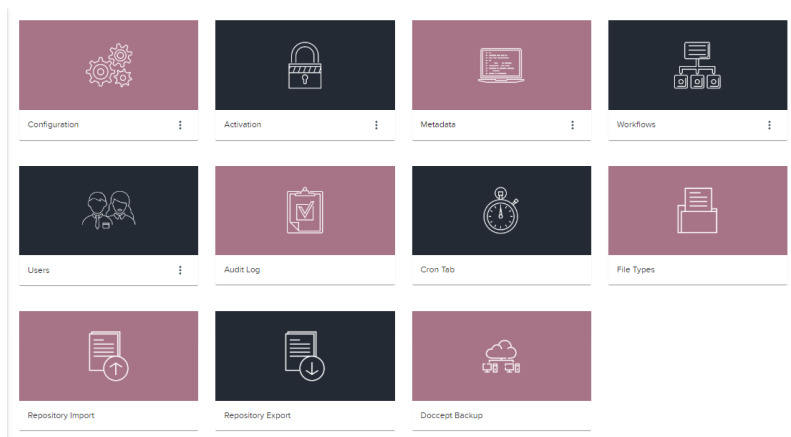
Reset

Add New Row

Title Name corresponds to either Document Name, Folder Name or Mail Subject
Content corresponds to either File Content or Mail Content

ADMINISTRATION SCREEN

Administration screen is available only to the users with Admin access. This screen will enable the administrator to setup required configurations for Doccept such as maximum file size, preview settings, LDAP settings, License activation, Workflow and reports configuration, cronjobs, repository import and export, etc



HOME

Clicking on the Home icon will redirect the user to the Home tab from the current tab/ screen

USER PROFILE

My Profile

User profile facilitates the user to change their profile related information such as Password, Email information.



My Mail Account

Facilitates the user to configure their mail accounts related information the action dropdown consists the following action:



- **Edit** - To edit and modify the configured mail account information.
- **Delete** - : To delete the configured mail account for the list.

Create Mail Account

To add New Mail Account click on this icon in the Mail Account Summary page and provide the mail protocol, mail host, mail user, mail password and folder

Create Mail Account

✕

Mail Protocol*

▼ Mail Host *

Mail User*

Mail Password*

Mail Folder*

☐ Mail mark seen
 ☐ Mail mark deleted
 ☐ Active

Check

Save

Cancel







Exit

The user can logout of the application by clicking the logout icon on the menu bar as shown above or the logout/exit option within the File Menu.

HOME SCREEN COMPONENTS

MY RECENT ACTIVITIES



This feature provides the summary of the activities performed by a specific (logged in) user. Recent 10 transactions will be displayed and user can further scroll down to see old transactions.

My Recent Activities			
File Type	Name	Action	Updated Date
	(1) DS_Store	Deleted	28-06-16 18:07:23
	0310063004 (1).jpg	Deleted	28-06-16 18:07:12
	ski.jpg	Renamed	28-06-16 12:52:40
	IMG_4004.JPG	New	28-06-16 18:52:17
	IMG_4133.JPG	New	28-06-16 18:30:36
	TaskDetails.java	New	28-06-16 18:09:56

All transactions related to the document are listed here. E.g. New file uploads, Edited (documents downloaded for modification), Modified (documents uploaded after modification), Deleted (deleted documents(lock), Locked ed documents).

NEW UPLOADS

This feature provides a snapshot of recent uploads performed by the (logged in) user. The recent 10 transactions will be displayed and user can further scroll down to see old transaction.

New Uploads		
File Type	Name	Updated Date
	IMG_4191.JPG	26-06-16 19:00:28
	IMG_4505.JPG	25-06-16 19:03:58
	IMG_4534.JPG	25-06-16 19:03:55
	IMG_4533.JPG	26-06-16 19:03:50
	IMG_4532.JPG	26-06-16 19:03:47
	IMG_4531.JPG	25-06-16 19:03:42

RECENTLY MODIFIED

This feature provides a list of recently modified documents. Ten most recently modified documents will be displayed and user can further scroll down to see old transactions.

Recently Modified		
File Type	Name	Updated Date
	36_Sandeep_Dot Net_Resume - Copy 9.doc	07-07-2016 17:02:36
	44_Sandeep_Dot Net_Resume - Copy (8) - Copy - Copy.doc	27-06-2016 17:13:50
	Test_data11.xls	22-06-2016 19:38:37
	Test_data1.xls	27-06-2016 17:13:49
	Issues sheet.xls	27-06-2016 20:59:13

MY EMAILS

This section contains recently imported emails from the user's mail account which is configured in Doccept Emails are configured by the administrator using the following screen/module in users section of administration page, or users from their profile section.

My Emails		
	Forgot Password	3.9 KB
	Welcome to Kensium!!!	18.1 KB
	Welcome to Kensium!!!	18.1 KB
	Welcome to the Kensium Family!	28.2 KB
	BMS - link	8.6 KB
	Birthday Wishes!!!	38.8 KB

MY OPEN TASK

This feature gives a summary of tasks that are awaiting the user's action. These include items such as approvals, review or rejecting a document. These tasks are hyperlinked and a user can navigate to the respective documents, by a clicking on the file path.

My Open Tasks		
task-create	/root/Add/Copy of Doccept_Explorer_Tasks.xlsx	28-06-2016 17:19:23
task-create	/root/12_jsankar - Copy~1.txt	05-07-2016 23:50:46

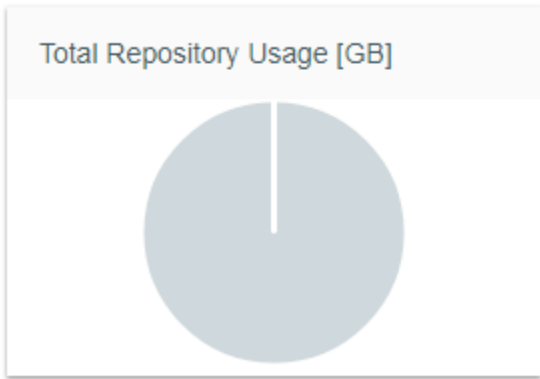
GRAPH – TOTAL REPOSITORY USAGE

Shows the disk space usage of the currently logged in user. The Maximum units would either be the Space quota defined for this user (this can be setup in the User profiles) or the complete repository size (which would be the free space on the current drive plus the space currently used by Doccept). Also shows the different file types with respective color as shown in figure. Graph with User Quota Defined:

E.g:

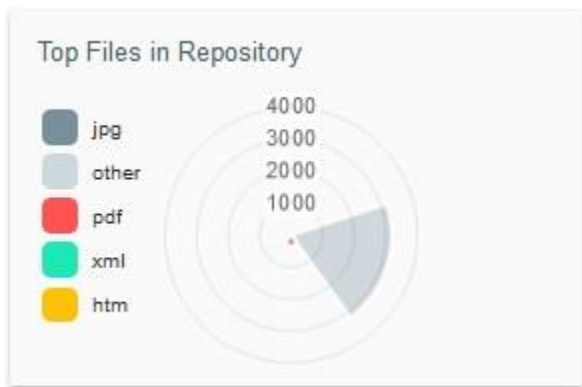
Maximum User Quota defined: 420 GB

User Space usage: 1.5 GB



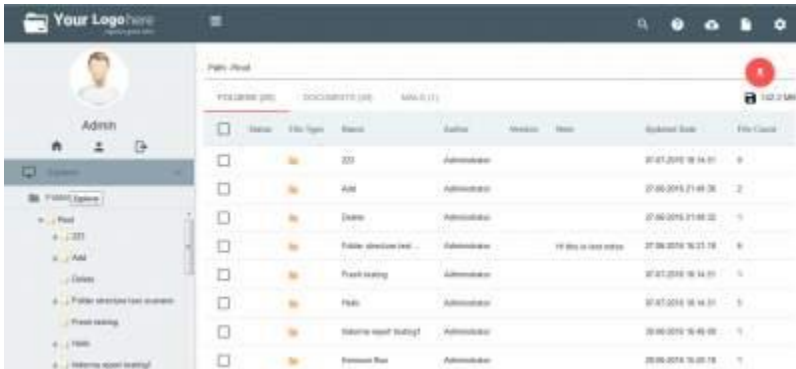
GRAPH – TOP FILES IN REPOSITORY

Displays the Top 5 file formats that were uploaded by the current user. This will be based on the number of files uploaded per each format.



EXPLORER SCREEN COMPONENTS

EXPLORER TAB



On the Explorer tab we have five well-defined sub-tab: Folder Tree Structure, and Folder Browser. Folder Tree Area is reused for various sections including Categories, Templates, Emails, and Trash

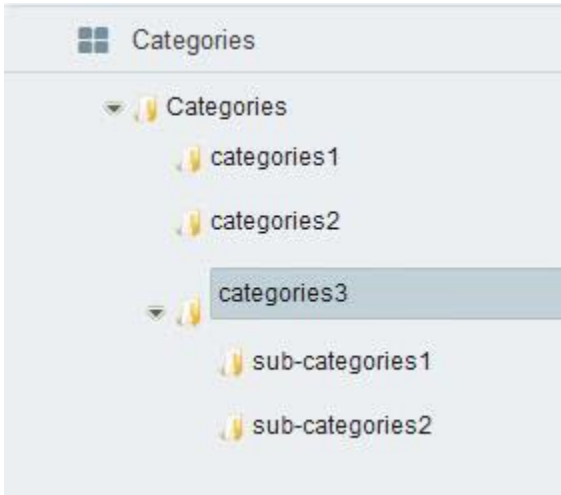
FOLDER TAB

The Folders Tab on the left shows the tree structure of the folders with expandable and collapsible tree structure. The context menu (right-click) shows all the functions that can be performed on the folders. Also contain three tabs which show the total count of Folder, Documents and Mails. Provide upload document option by clicking on file upload icon. The pop-up will appear to rename the folder by clicking on folder name. Folder tab offers bulk Delete, Copy, and Move option by selecting either single or multiple checkbox (Select All).



CATEGORIES TAB

The side panel of the desktop offers a view of the categories, organized in a hierarchical folder structure. Categories are defined as a knowledge tree through which the user can further organize files in addition to the physical folder structure.

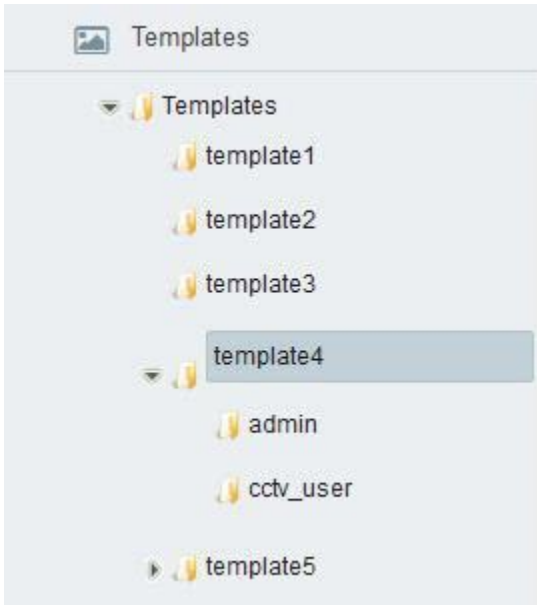


Categories are a hierarchical tree structure of category and subcategory folders. A document can be linked with many category folders at the same time. Each time some category folder is selected, all related documents will be displayed in the file browser panel. All the major document functionalities are available from this view. The context menu (right-click) shows all the functions that can be performed on the Categories. Categories contain three tabs which show the total count of Folder, Documents and Mails. Provide upload document option by clicking on file upload icon. The pop-up will appear to rename the folder by clicking on folder name. Categories tab offers bulk Move option by selecting either single or multiple checkbox (Select All). Note: Categories are logical grouping of content/documents (Example video programs, specific client, country or region, Invoices, etc.). Documents on Doccept can be assigned to multiple categories.

TEMPLATES TAB

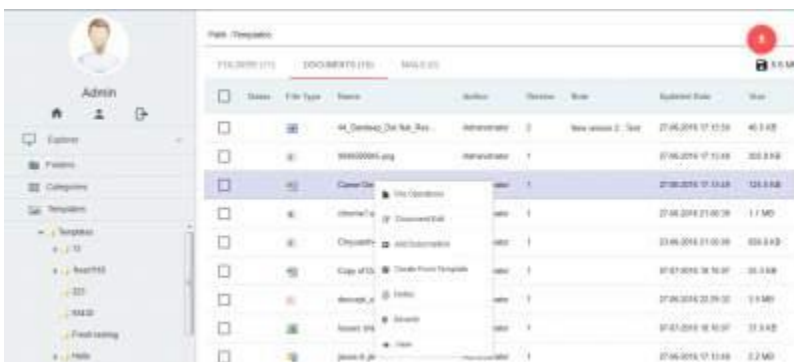
Templates are documents in a pre-defined format used by an organization to ensure enforcement of corporate standards. These templates are shown in a tree folder structure, in the template panel, and can be used by users as a referral points before creating new documents (for example fax, new project document templates, invoices, etc.) From the Templates panel, select a document, and execute the option "create from template". A popup will appear requesting the destination folder. After selecting the path for the destination folder, The context menu (right-click) shows all the functions that can be performed on the Templates. Templates contain three tabs which show the total count of Folder, Documents and Mails. Provide upload document option by clicking on file upload icon. The pop-up will appear to rename the folder by clicking on folder name.

Template tab offers bulk Delete, Copy, and Move option by selecting either single or multiple checkbox (Select All).



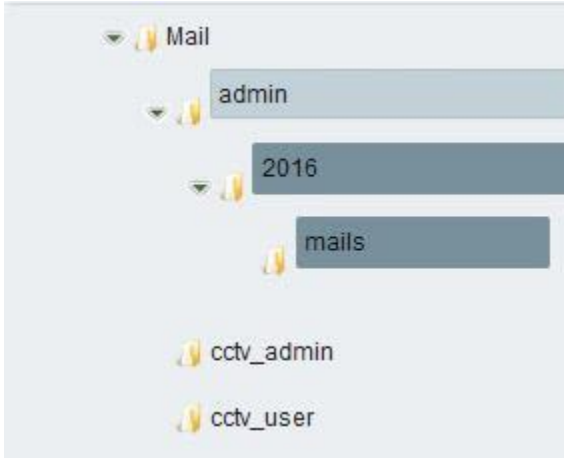
Create new Document from template

From the Templates panel, select a document, and execute the option "create from template". A popup will appear requesting the destination folder. After selecting the path for the destination folder, Document name can be renamed (Optional)



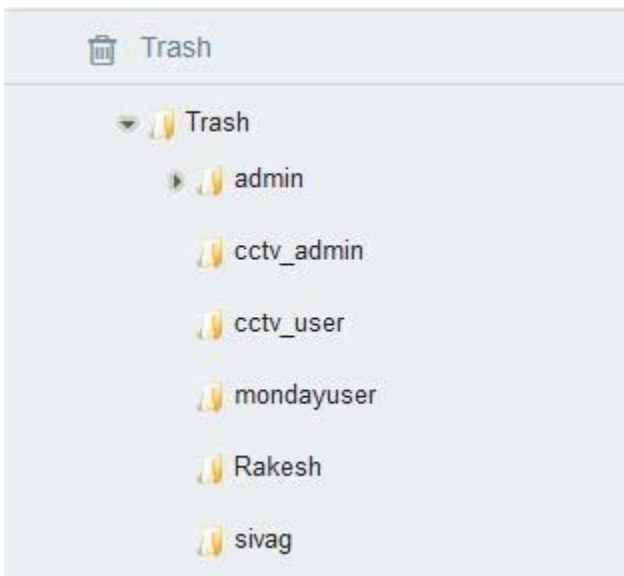
EMAILS TAB

This section contains recently imported emails from the user's mail account which is configured with Doccept. There are various options of integrating Emails with Doccept (POP, POP3, IMAP, IMAPs). Interval at which emails are synced with Doccept is configured by the Administrator. Email Attachments are indexed too. The importing mechanism creates a folder structure based on year, month and day to automatically organize imported mails. The context menu (right-click) shows all the functions that can be performed on the Mails. Mails contain three tabs which show the total count of Folder, Documents and Mails. Provide upload document option by clicking on file upload icon. The pop-up will appear to rename the folder by clicking on folder name. Mail tab offers bulk Delete, Copy, and Move option by selecting either single or multiple checkbox (Select All).



TRASH

Deleted files and folders are stored in Trash so as to recover them if their deletion was accidental. Trash and the files located in Trash, are tracked at a user level. This tab is available by default to Admin user alone, unless it is specifically provided to the users. The context menu (right-click) shows all the functions that can be performed on the Trash. tab offers bulk Delete, Copy, and Move option by selecting either single or multiple checkbox (Select All).



MENU BAR

The menu bar contains a collection of pull down menus with different options. Options are enabled/ disabled depending on the context of the element/file/folder that is selected.



PENDING TASKS

This icon blinks indicating that there are ‘Open Tasks’ pending for completion. On click on this icon the user will be redirected to the My Open Tasks panel in the Home Screen.

INTERNATIONALIZATION

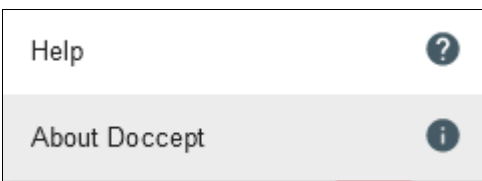
Provides an option to change the language option (applied for all Labels/ messages across the application). The default language is “English” and an additional “Arabic” language option is provided.

GLOBAL SEARCH

A global quick search follows the user across all screens, and allows the user to quickly search within the file content or file name. By default the search range would be current selected Folder, if you want to search in complete repository then select the Option “Global” in the search criteria.



HELP MENU



About Doccept: Provides a link to the About Doccept window which provides details of Doccept version and copyright information.

Help: Provides an HTML help file with search facility.

FILE UPLOADER

File uploader provides a facility to upload multiple files to a selected folder in Doccept via drag and drop functionality. When the user selects this option from the File menu, Doccept activates a drag and drop area within the document browser section.

Upload Files

Upload File(s)

OR

Drag & Drop your file(s) here

Total Size: 20072bytes

+ Add Metadata

Clear All

doccept-logo.png- 13211bytes	✖
sampleLogo.png- 5519bytes	✔
top.png- 1342bytes	✔

OPERATIONS

The options available here depend on whether the entity for which this menu was activated is a folder or a file.

Create Folder

Add Document

Download Document

Download Document As PDF

Share Link

Send As Attachment

CREATE FOLDER:

Creates a folder in the current selected folder location.

Add New Folder
×

New Folder

0/255

Add Cancel

ADD DOCUMENT:

To add a document or extract archived (ZIP format) documents to the current location.

Add new document
×

Choose file

Comment

0/150

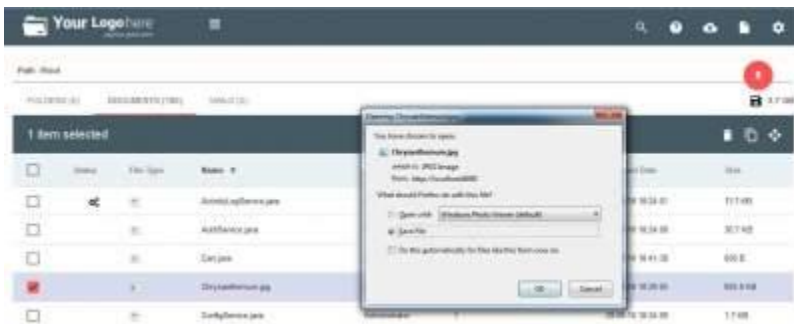
☐ Import Documents from ZIP

☐ Notify Users

Submit Cancel

DOWNLOAD DOCUMENT:

To download the selected document in its native format.



DOWNLOAD DOCUMENT AS PDF:

To download the selected document in PDF format.

SHARE LINK:

To share the document access link for doccept users. Applicable for documents only.

Send document link

Notification Message

0/150

Users to Notify*

Groups to Notify

Send

Cancel

An email with the document link is sent to the notified users.

SEND DOCUMENT AS ATTACHMENT:

To share the document as email attachment to both internal doccept users as well as external users.

Send document attachment

Notification Message

0/150

Users to Notify*

Groups to Notify

CloseNotification Email ID
(Use *; as separator for Multiple Ids.)

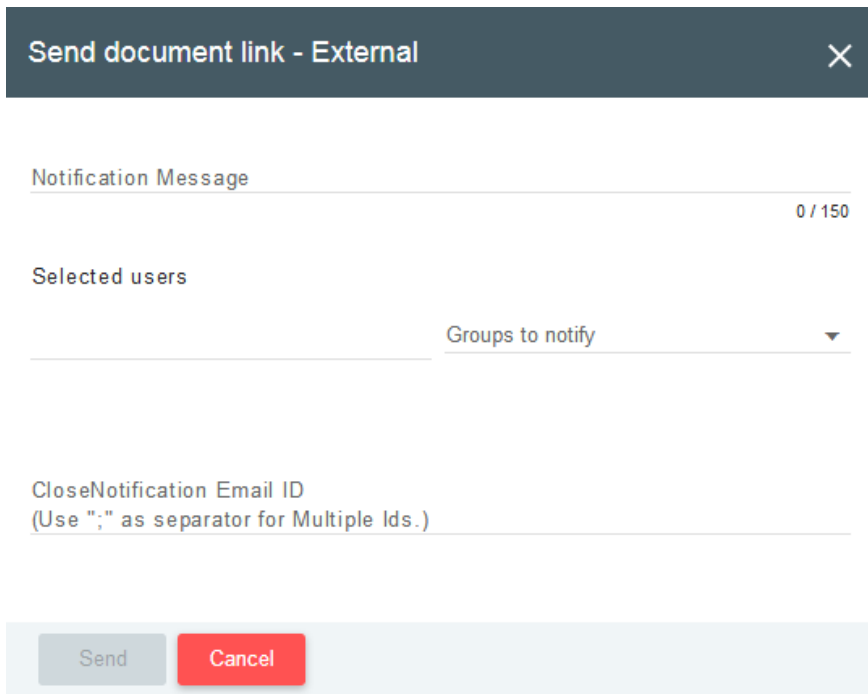
Send

Cancel

An email with the document attachment is sent to the notified users both internal and external.

SEND DOCUMENT LINK - EXTERNAL:

To share the document download link to both internal doccept users as well as external users. This link will be valid for only 24 hours from the time it was shared to the client.



The dialog box titled "Send document link - External" contains the following fields and controls:

- Notification Message:** A text input field with a character count of "0 / 150".
- Selected users:** A text input field.
- Groups to notify:** A dropdown menu.
- CloseNotification Email ID:** A text input field with the instruction "(Use ',' as separator for Multiple Ids.)".
- Buttons:** "Send" (disabled) and "Cancel" (active).

An email with the document download is sent to the notified users both internal and external.

SCANNER:

Integration with 3rd party scanner tool to directly scan documents into Doccept.

Pre requisites:

- Please install the scanner drivers to the client machine which is used to access Doccept.
- Ensure that the scanner device is accessible to the client machine (standalone or network).
- Install the Scanner client side plugin which is mandatory for this function to work. Please contact your support team for the tool setup file.

To share the document access link for doccept users. Applicable for documents only.

Share Folder

✕

Notification Message

0 / 150

Selected users

Groups to notify

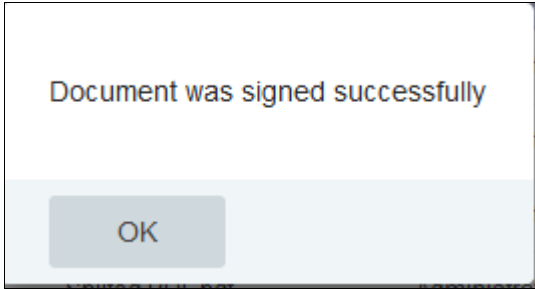
▼

Send

Cancel

An email with the folder link is sent to the notified users.

This is applicable only for PDF files and the “Signature” as configured on the User Profile will be embedded to the bottom of the PDF file i.e., bottom of the last page in the PDF file.



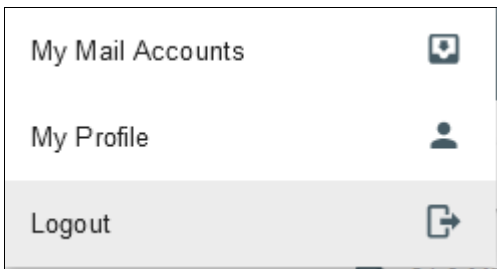
PDF ANNOTATIONS:

Integration with a 3rd party tool to enable PDF annotations. This feature will be available only for PDF files and the tool requires Java 7 to be installed on the client machine.

PDF FORM FILLING:

Integration with a 3rd party tool to enable PDF form-filling. This feature will be available only for PDF files and the tool requires Java 7 to be installed on the client machine.

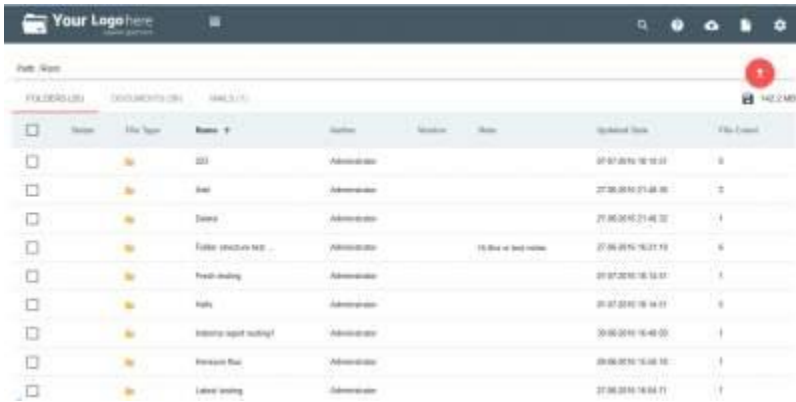
SETTINGS



BROWSER

Folder Browser

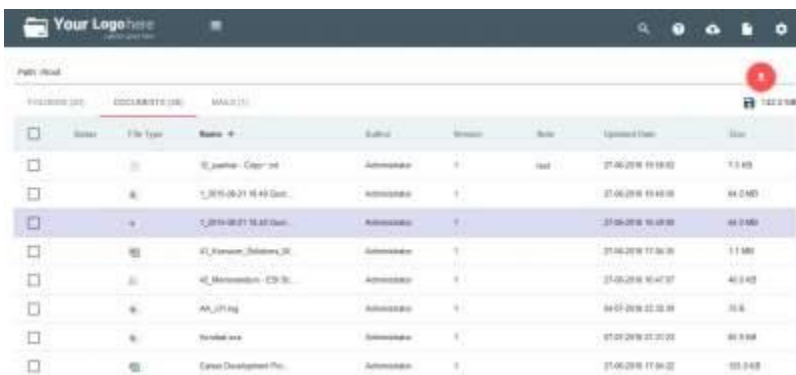
The folder browser allows you to view the list of folders available on a specific node of the explorer tree. The details on the Folder Browser get updated on each selection of a folder from the Tree View. It shows contents of the folder along with attributes of each entity and count of folders within the folder.



Folder	File Type	Name	Author	Version	Size	Updated Date	File Count
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1

Document Browser

The document browser allows you to view the list of documents available on a specific node of the explorer tree. The details on the Document Browser get updated on each selection of a folder from the Tree View. It shows contents of the folder along with attributes of each entity and count of documents within the folder.



Folder	File Type	Name	Author	Version	Size	Updated Date	File Count
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1

Mail Browser

The Mail browser allows you to view the list of Mails available on a specific node of the explorer tree. The details on the mail Browser get updated on each selection of a folder from the Tree View. It shows contents of the mail along with attributes of each entity and count of mails within the folder.

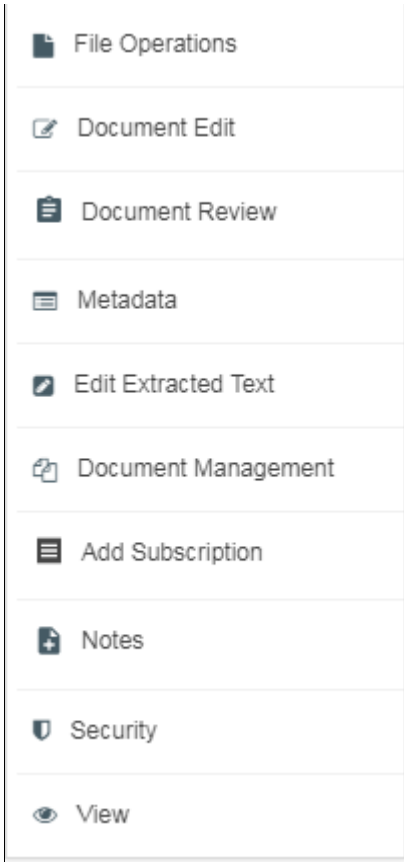


Folder	File Type	Name	Author	Version	Size	Updated Date	File Count
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1
Documents (10)	Document	Doc	Administration	1	10 KB	27-05-2019 10:10:10	1

RIGHT CLICK MENU

Each element in the Document Browser will have options: Action. By right click, a menu as shown below pops-up. The options available here depend on whether the entity for which this menu was activated is a folder or a file.

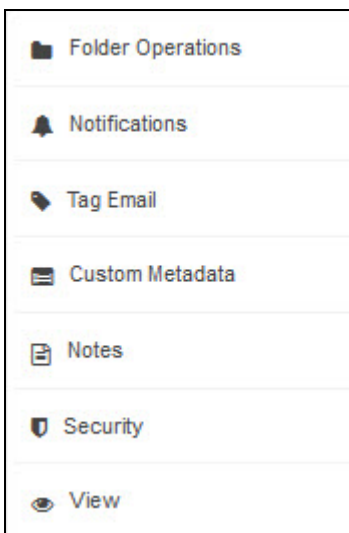
File Action



- File Operations
 - Download
 - Request to Download
 - Copy
 - Rename
 - Delete
 - Export to ZIP
- Document Edit
 - Edit
 - Lock
 - Update New Version

- PDF Split
- Document Reviews
- Metadata
 - Custom Metadata
 - Manage Keywords
 - Manage Categories
- Edit Extracted Text
- Document Management
 - Create Link
 - Document Expiration
- Add Subscription
- Notes
- Security
- View
 - Properties
 - Notes
 - Security
 - Preview
 - Request to Preview
 - Workflow Log
 - View Extracted Text
 - Custom Metadata
 - Document Log

Folder Action



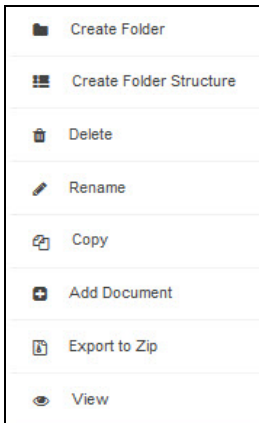
- Folder Operations
 - Copy
 - Rename
 - Delete
 - Export to ZIP

- Notifications
 - Alerts
 - Auditing
 - Add Subscription.
- Tag Emails
- Custom Metadata
- Notes
- Securities
- View
- Properties
 - Notes
 - Securities
 - Notifications
 - Alerts
 - Auditing

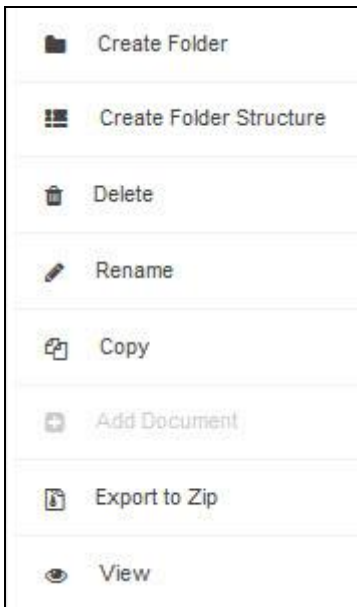
MENU ACTIONS

CREATE FOLDER

To create a folder or sub folder on the explorer tree structure, and can be accessed via the context-menu (right-click) on a folder, or via the File Menu at the top.

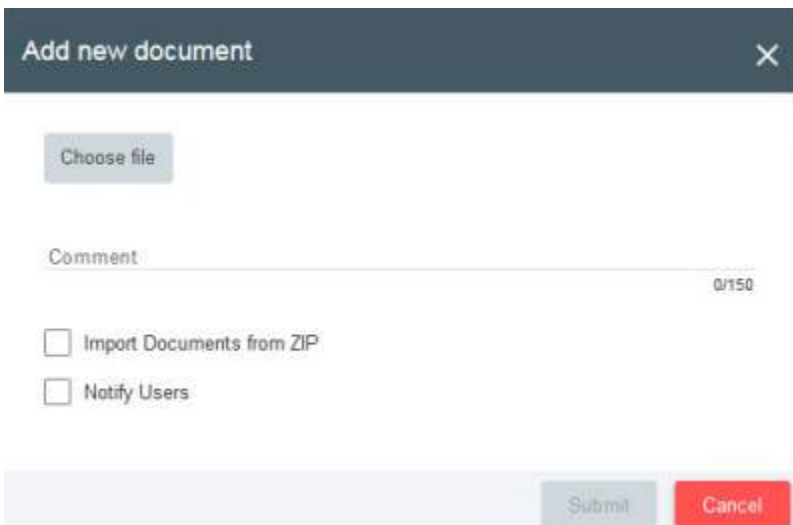


ADD DOCUMENT



Accessible from: Right click on folder and shortcut on Folder browser.

The option "Import documents from ZIP" allows you to import the contents of a zip file while respecting the hierarchy of the folders present within the zip. When the Add New Document window appears on the screen, select the file you want to upload to Doccept by clicking the button "Browse" which will display the folders/files from the computer you are accessing Doccept from. If you want to notify users that you have uploaded a new file, mark the checkbox "Notify users". This will inform the selected users or groups via email or SMS (if setup on the server).

A screenshot of the 'Add new document' window. It has a dark header bar with the title 'Add new document' and a close button (X). Below the header, there is a 'Choose file' button. Underneath is a 'Comment' text field with a character count '0/150'. At the bottom, there are two checkboxes: 'Import Documents from ZIP' and 'Notify Users'. At the very bottom, there are 'Submit' and 'Cancel' buttons.

To verify the Metadata groups mapped to the folder to which the document is uploaded and display the Metadata groups. The Add metadata screen will appear soon after the upload button is clicked and file is being uploaded to Doccept.

Add new document

Choose file

Comment
0/150

☐ Import Documents from ZIP

☒ Notify Users

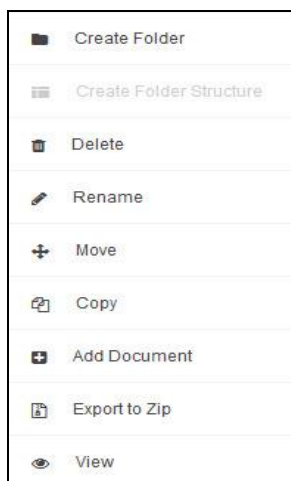
Notification Message
0/150

Users to Notify
Groups to Notify

Submit
Cancel

CREATE FOLDER STRUCTURE

Select a Particular folder, right click and create a folder structure as shown below. This feature allows the user to quickly create a pre-defined set of directories as defined by the administrator. User defined folder structures can be defined in an xml format on the server.



DOWNLOAD

Accessible from: Right Click on document. File Operations>>Download

Download option will download the file to the browser's download folder. Access to this feature can be managed through user profiles. This feature will help a user to download document in its extension format (e.g. PDF, xls etc).

REQUEST TO DOWNLOAD

Accessible from: Right Click on document. File Operations>>Request to Download

This feature is enabled based on the configuration on the User Profile and when the user clicks on this option an message will be sent to all admin users with a request for download on the selected file.

Once the request is approved by the admin user, the end user will be able to download the file till the request expires.

EDIT (CHECK-OUT)

Accessible from: Right Click on document. Right click>>Document Edit>>Edit.

To edit a file's contents, you must check-out the document from Doccept by clicking on the "Edit" option. This will download the file to the local computer which can then be edited using its native application (e.g. Word, Excel, etc.) Once you have made the pertinent modifications, upload it back to Doccept via "Update (Check-in)".File checked out for editing is automatically locked ensuring that no other user can modify its contents while you are modifying it.

UPDATE (CHECK-IN)

Accessible from: Right Click on document. Right click>>Update.

Once the changes have been made on the local computer, you must do an "Update (Check-in)" to upload the file to the system. This will create a new version of the file, and will also unlock the file for editing by other users. Doccept also checks to see if the file was really modified. If not, a new version will not be created.

Note: The file name of the newly uploaded file should match with the original file name of the file that was checked-out. Ignore the UUID and Version Id mapped to the checked out file.

CANCEL EDIT

Accessible from: Right Click on document. Right click >> Cancel Edit.

If you want to cancel editing of a document, "Cancel Edit" option exists which unlocks the file and restores it to its previous state

UPLOAD NEW VERSION

Accessible from: Right Click on document. Right click >>Document Edit>>Upload New Version.

If you want to upload a new version of an already existing document without the normal Check-out/ Check-in process just use Upload New Version feature to upload a new version of a document into Doccept.

LOCK

Accessible from: Right Click on document. Right click >>Document Edit >>Lock.

If you want to protect the file so that no other user can make changes to it, you can use the Lock function. This means that until it is unlocked, no other user can modify it. When locked, a locked icon will appear to the side of the name of the selected file..

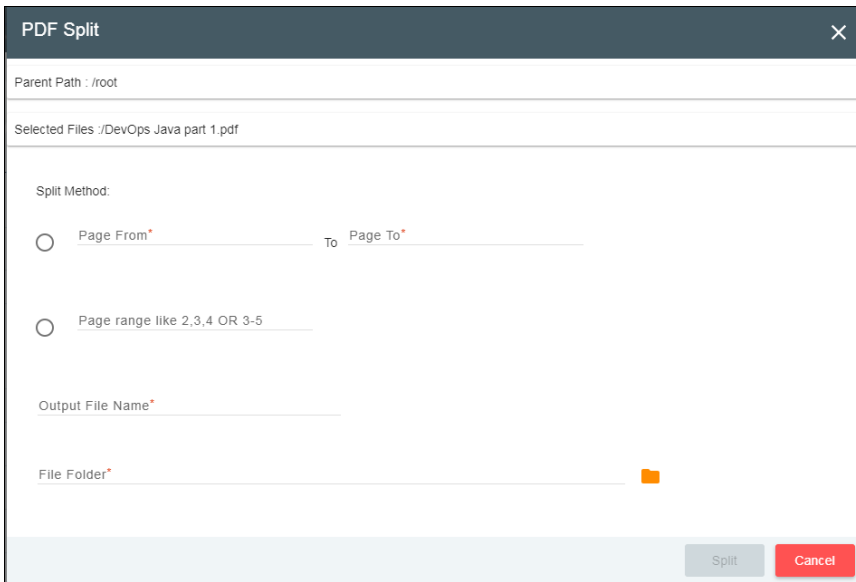
UNLOCK

Accessible from: Right Click on document. Right click >>Document Edit>>Unlock

If you want to protect the file so that no other user can make changes to it, you can use the Lock function. This means that until it is unlocked, no other user can modify it. When locked, a locked icon will appear to the side of the name of the selected file.

PDF SPLIT

Accessible from: Right Click on document. Right click >>Document Edit >>PDF Split.



The screenshot shows a 'PDF Split' dialog box with a dark header bar containing the title 'PDF Split' and a close button. Below the header, there are several input fields: 'Parent Path : /root', 'Selected Files :/DevOps Java part 1.pdf', 'Split Method:' with two radio button options ('Page From' and 'Page To' with a 'To' label in between, and 'Page range like 2,3,4 OR 3-5'), 'Output File Name*', and 'File Folder*' with a folder icon. At the bottom right, there are 'Split' and 'Cancel' buttons.

If you want to split any PDF file so that it can be create new files out of single PDF file, you can use the PDF Split function. The PDF is split on the following criteria:

- Page Range (from page number to final page number): User can specify Starting page number to end page number. Doccept will split the page in between these page numbers (including the starting and ending pages). For eg: Input 5 to 10 to split the pages 5 to 10 from the selected PDF file.
- Page Range (selective): different page numbers (not in order) can be specified using a comma separator like 2,5,7 etc., Also a range of pages can be specified using hypen as separator like 3-5 (means pages 3 to 5)

Output File Name: To specify the final output file generated by merging all the split pages form the original PDF file.

File Folder: the destination folder where the Output file will be copied.

Note: the page numbers specified on the input criteria should be with the less than equal to the total number of pages in the Original PDF file.

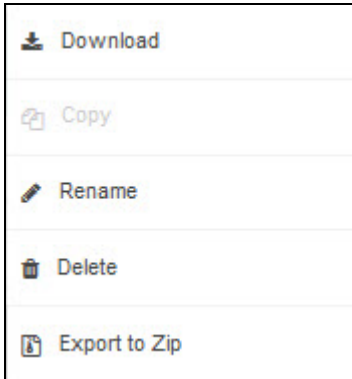
COPY

Accessible from:

- Context (right mouse click) menu of the folder tree.

- Right Click on document / folder browser. Right Click>>Folder Operations (Folders) and Right Click>>File Operations (Documents)

A dialogue box to select the location to copy the document or folder to appears. If you do not have write permission in the new location the Copy button will be disabled.



MOVE

Accessible from:

Massive option bar.



Select Folder / Documents / Mails tab then check single / multiple checkbox to Move folder/s or document/s And Mail/s.

Action menu of the document/ folder browser. Select Checkbox>>Massive Option Bar (Move icon comes here) and >>Select Destination Folder.

A dialog box appears to select the new location of the document or folder. If you do not have permission in the new location the Move button will appear disabled.

FOLDERS (20)DOCUMENTS (37)MAILS (1)142.2 MB

20 items selected

<input checked="" type="checkbox"/>	Status	File Type	Name	Author	Version	Note	Updated Date	File Count
<input checked="" type="checkbox"/>		Folder	223	Administrator			07-07-2016 16:14:51	0
<input checked="" type="checkbox"/>		Folder	Add	Administrator			27-06-2016 21:48:36	2
<input checked="" type="checkbox"/>		Folder	Delete	Administrator			27-06-2016 21:48:32	1
<input checked="" type="checkbox"/>		Folder	Folder structure test	Administrator		Hi this is test notes	27-06-2016 16:21:18	0
<input checked="" type="checkbox"/>		Folder	Fresh testing	Administrator			07-07-2016 16:14:51	1
<input checked="" type="checkbox"/>		Folder	Hubs	Administrator			07-07-2016 16:14:51	0
<input checked="" type="checkbox"/>		Folder	Informa report testing1	Administrator			30-06-2016 16:48:08	1
<input checked="" type="checkbox"/>		Folder	Kuramam Flow	Administrator			26-06-2016 15:58:18	1
<input checked="" type="checkbox"/>		Folder	Latvian testing	Administrator			27-06-2016 16:04:11	1
<input checked="" type="checkbox"/>		Folder	note	Administrator			07-07-2016 16:08:42	0
<input checked="" type="checkbox"/>		Folder	Notes	Administrator			07-07-2016 16:08:42	1

RENAME

Accessible from:

Click on Folder or File name.

Rename pop-up will appear. Rename (document or folder) >> Save.

Rename option will rename a file/ folder. Maximum length allowed is 255 characters and the following special characters are not allowed in the file/ folder names:

< > \ / ? * : |

DELETE

Accessible from:

Context (right mouse click) menu of the folder tree.

Right Click on the document/ folder. Right click >> Folder Operations (Folders) >> Delete and Action >> File Operations (Documents) >> Delete

Simply choose the folder or document and select the option "Delete". Doccept will always ask you for confirmation on this action.

When a document or folder has been deleted, it is moved to Trash, which can be restored by the Administrator or another user that has the permissions.

SUBSCRIPTION

Accessible from: Right click on the document/ folder. Right Click >> Notifications >> Add/ Remove Subscriptions.

Doccept allows you to subscribe to a folder or document. When subscribed, you will be alerted on any change made to the document or folder.

These are some of the events which generate a notification:

- Cancelling a document edit
- Uploading modifications of a document
- Copying a document
- Creating a document
- Setting the properties of a document
- Unlocking a document
- Making a subscription
- Deleting a subscription

DOCUMENT REVIEWS

Accessible from: Right click on the document/ folder. Right Click>>Document Reviews.

Doccept allows you to create your own Document Review workflow for the document you have uploaded. Doccept allows user to configure upto 5 levels of review for a document.

Document Review - Configuration

Path: /Root/DevOps Java part 1.pdf

Review Levels : 5
Destination Folder*

Task Name*		Assign To*		Approval Status			Permissions*	
Level	Task Name	User	Role	Notify	Approve	Reject	Read	Write
1		*	*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2		*	*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3		*	*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4		*	*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5		*	*	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Start
Cancel

Review Levels: User can select the number of review levels he want to configure for his document.

Destination Folder: The finally approved file will be automatically moved to the destination folder on Approval of the last review level.

Task Details:

Task Name: User can configure unique name to each task level in the Review cycle

Assign To (User/ Role): User can configure the task executor (either by selecting the User name or Role name). This task will be assigned to the respective User or Role. The task is reflected in the My Tasks section of Home page for the respective User or group of users as mapped to the assigned Role.

Notify: If selected the task assignment notification is sent to the User or Role who are mapped to the tasks in the Review list.

Approve: Default mandatory, this will define if the Approve option is to be provided in the Task execution screen for each task.

Reject: This will define if the Reject option is to be provided in the Task execution screen for each task.

Permissions

Read: Default mandatory, this will define if the read permission is to be provided for the Task assignee to view the file and review the same for each task.

Write: This will define if the write permission is to be provided for the Task assignee to view the file and review the same for each task.

Document Review - Configuration

Path: /Root/DevOps Java part 1.pdf

Review Levels : 2

Destination Folder*
/root/KM/Test 1

Task Name*		Assign To*		Approval Status			Permissions*	
Level	Task Name	User	Role	Notify	Approve	Reject	Read	Write
1	task_mgr	fin_user		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	task_hod	mgr		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Start
Cancel

Review Status:

The Review status is denoted with a (✓) mark against the document in the Document explorer. The (✓) mark color codes:

- ✓: Approved
- ✓: In Progress
- ✓: Rejected

<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	DevOps Java part 1.pdf	Administrator	1	10-07-2018 23:45:35	166.4 KB
--------------------------	-------------------------------------	--------------------------	------------------------	---------------	---	---------------------	----------

On click of the Review icon the following status window is displayed with the Review status:

Path: /Root/DevOps Java part 1.pdf

task_mgr
Open

task_hod
Pending

Assigned To : Fin User
Started On : 20-10-2019 19:44:21

Assigned To : Manager

Cancel

Pending Task Status:

Pending Task status is denoted on the Menu bar for the Task assignee users. On click of the Task status icon the “My Open Task” window is displayed with the Review task:



My Open Tasks		
Task	File Path	Updated Date
task_mgr	/root/DevOps Java part 1.pdf	20-10-2018 19:44:21

Click on the Task name the following Task execution screen will be displayed.

Task Execution:

Review Task

Details

Task Name:

task_mgr

File Path:

/root/DevOps Java part 1.pdf

Creation Date:

20-10-2018 19:44:21

Add Comment

0 / 150

Add Comment

Action

Action*

Complete

Add Comment: User/ Reviewer can provide their comments in this section.

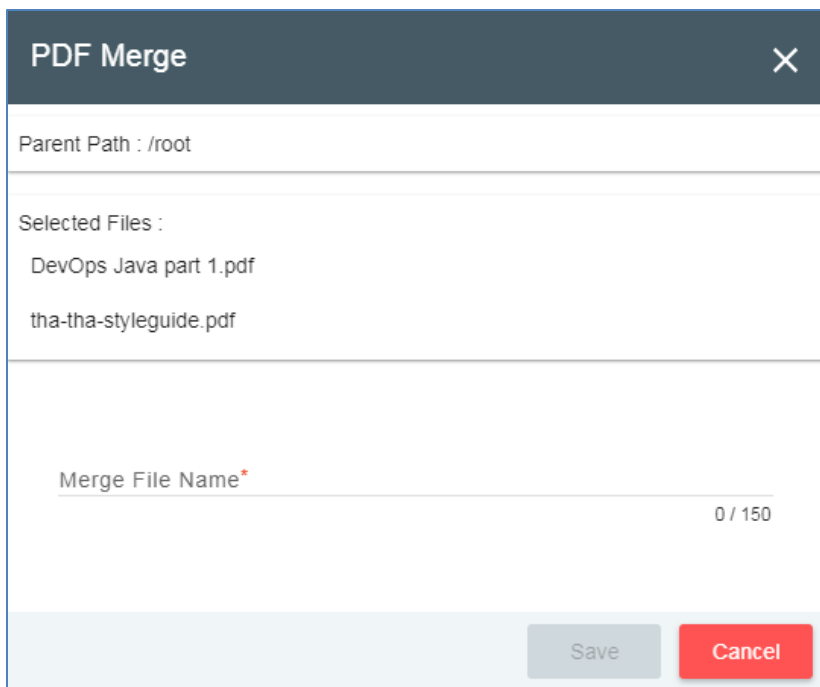
Action: Options Approve/ Reject will be displayed based on the configuration setting for the Document Review.

Complete: Click on the Action option and click on Complete to complete this Review task.

MASSIVE ACTIONS MENU



PDF MERGE

A dialog box titled "PDF Merge" with a close button (X) in the top right corner. It has a light gray background. The first section is labeled "Parent Path : /root". The second section is labeled "Selected Files :" and contains two file names: "DevOps Java part 1.pdf" and "tha-tha-styleguide.pdf". The third section is labeled "Merge File Name*" and has a text input field with "0 / 150" characters. At the bottom right, there are two buttons: "Save" (gray) and "Cancel" (red).

Doccept allows you to merge multiple files (PDF files only). Select the checkbox against the PDF files to be merged and select the PDF Merge option from Massive Option Bar.

Provide the Final merged PDF file name and click on Save button. The final resultant file will be saved to the current folder location.

MASSIVE METADATA

Doccept allows you to delete multiple files (in a single page). Select the checkbox against the files to be mapped with Metadata and select the Metadata option from Massive Option Bar.

MASSIVE EXPORT

Doccept allows you to export multiple files (in a single page) to ZIP archive. Select the checkbox against the files to be exported and select the download option from Massive Option Bar.

MASSIVE DELETE

Doccept allows you to delete multiple files (in a single page). Select the checkbox against the files to be deleted and select the Delete option from Massive Option Bar.

MASSIVE COPY

Doccept allows you to copy multiple files (in a single page). Select the checkbox against the files to be deleted and select the Copy option from Massive Option Bar.

MASSIVE MOVE

Doccept allows you to move multiple files (in a single page). Select the checkbox against the files to be deleted and select the Move option from Massive Option Bar.

MASSIVE SECURITY

Doccept allows you to map security to multiple files (in a single page). Select the checkbox against the files and select the Security option from Massive Option Bar.

This will be allowed only when the security permissions on the selected files/ folders are similar across users and roles.

WORKFLOWS

Start Workflow

Select a document, click on the file icon in menu bar and select start workflow option to initiate a workflow on that document. A popup will appear with all the available workflows.

Workflow Pending Task

User can check all pending or open task at My Open Tasks section.

On selecting the pending task, workflow will demand for additional information about the pending task. Once user enters the information, workflow will proceed to the next step.

My Open Tasks

task-consolidate	/templates/template6/ComingDueReport.pdf	27-06-16 13:27:04
------------------	--	-------------------

ALERTS (FOLDERS)

Doccept has an alerting system that enables the user to schedule alerts at predefined intervals based on tasks that are supposed to happen as per a pre-defined schedule.

These alerts can be configured only at a Folder level and are classified as:

- Adhoc or One-Time Alerts
- Recurring Alerts, which can be scheduled at specific intervals such as daily, weekly, monthly, etc.

Adhoc Alerts

These are one-time alerts. User needs to provide only the Start date. Doccept will check for a file to be uploaded to this folder before the defined start date. Otherwise, an alert will be sent daily till the file is uploaded.

Property Group: Alerts

Alerts Type

Adhoc

Frequency

Minutes

Start Date

Range of Recurrence

Next Alert Trigger

Notification Email ID

0/150

Reminder (Days)

Reminder Email Ids

0/150

Snooze

Submit

Cancel

Recurring Alerts

These alerts are recurring in nature and will check for a document to be uploaded / updated within the defined interval (frequency). The alert notifications will be sent to the list of email ids provided in the Notification Email Id field. The below example defines a recurring alert with frequency as quarterly and the start date as is "01-10-2013". Doccept will automatically calculate the next alert trigger date and will check for a valid document on the pending alert trigger day. If a valid document is not found for that period, an alert will be sent to the mail ids as provided under Notification Email ids. Multiple emails ids need to be separated using a semicolon (;)

Property Group: Alerts

Alerts Type
Recurring

Frequency

Minutes

Start Date

Range of Recurrence

Next Alert Trigger

Notification Email ID

Reminder (Days)

Reminder Email Ids

Snooze

Submit
Cancel

Range of Recurrence

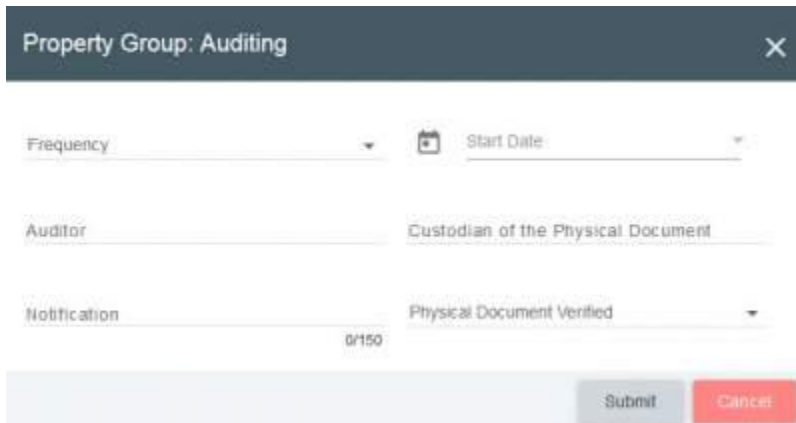
Range of Recurrence is applicable only for Recurring alerts. It can either be "No End Date" or "End in occurrences". If it is set to No End Date, the alerts will be perpetual. End in occurrences, the alerts will be propagated only for the specified number (count) of occurrences.

Snooze:

User can Snooze or postpone the alerts notification by setting up the Snooze based on "By days" or "By date" so that the alert is suppressed until a defined period, without completely disabling it. After expiry of the snooze period, Doccept will continue the checks and will raise alerts as needed.

AUDITING (FOLDERS)

Doccept has an Auditing section that allows users to setup pre-defined schedules for auditing the contents of folders. Audit can be any activity including checking for the existence of a physical document. This can be used to ensure that the custodian of a physical document is still holding the document and in good condition.



Property Group: Auditing

Frequency: [dropdown] Start Date: [calendar icon] [dropdown]

Auditor: [text input] Custodian of the Physical Document: [text input]

Notification: [text input] Physical Document Verified: [dropdown]

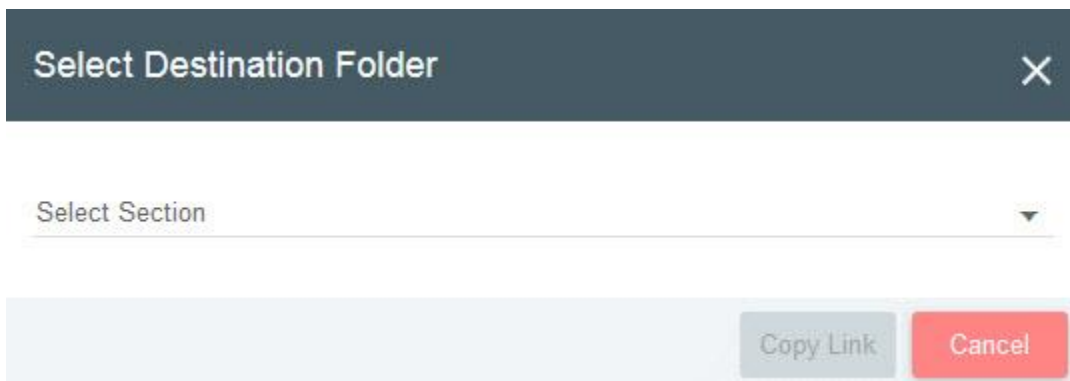
00150

Submit Cancel

CREATE LINK (DOCUMENTS)

This feature allows for the creation of a short-cut (link) of a file in another folder. Right click on file select document management and click on create link that brings up a dialog for choosing the folder where the link should be created.

Right Clicked >>Document management >> create link.



Select Destination Folder

Select Section: [dropdown]

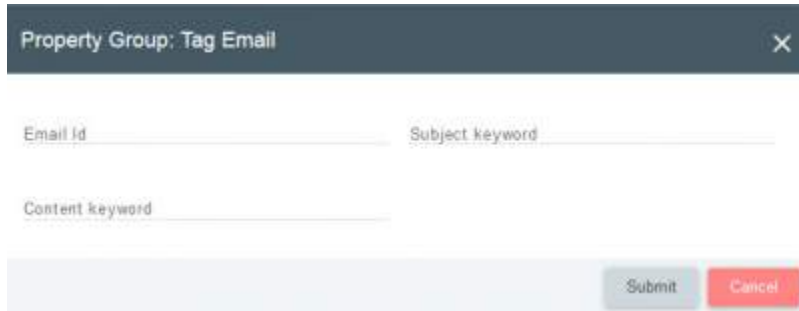
Copy Link Cancel

EXPORT TO ZIP

This feature helps the user to exporting a selected folder or file in a compressed (.ZIP) format. Only files that the user has access to, would be included in the compressed folder.

TAG EMAILS (FOLDERS)

Mails imported into Doccept reside in the Emails section of Doccept. Users can setup rules to automatically move e-mails to specific folders based on keywords in Email Id, Subject and Content fields. The parameters work with a logical AND condition. This feature is available only for folders.



Property Group: Tag Email

Email Id

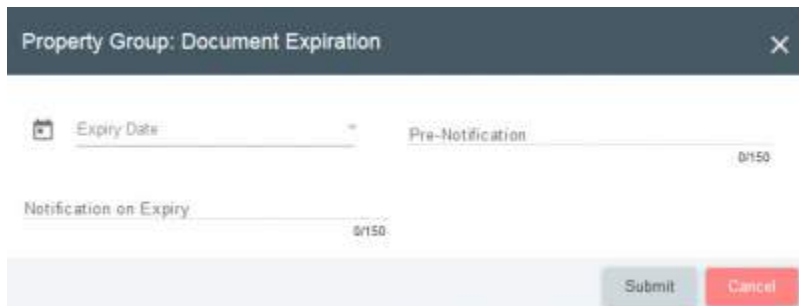
Subject keyword

Content keyword

Submit Cancel

DOCUMENT EXPIRATION

Doccept allows users to define a retention period for a document through the Document Expiration feature. Users can define a Expiry Date for a document post this date the document will be moved to the Trash folder. A pre-notification mail can be setup 7 days prior to the Date of Expiry by providing the list of email recipients under the Pre-Notification Notification on Expiry: A mail will be sent across stating that the document has expired to the list of recipients mentioned here.



Property Group: Document Expiration

Expiry Date

Pre-Notification

Notification on Expiry

Submit Cancel

MANAGE KEYWORDS (DOCUMENTS)

Doccept allows users to define keyword to documents for easy search. User can add multiple keyword on single document by Right Click on the document Metadata>>Manage Keywords. Manage keyword pop-up will appear, to offer add keyword/s and also consists Delete Icon to delete the defined keywords for a particular document.

Manage Keywords

Keyword

Add




Keyword	Action
No Records Found.	

Cancel

Manage Keywords

Keyword

Add

Keyword	Action
mails	
document	
keyword	

Cancel

MANAGE CATEGORIES (DOCUMENTS)

For Documents, you can assign or remove categories that this document belongs to. Adding or deleting categories does not modify the document version. By Right Click on the document. Metadata>>Manage Category. Manage Category pop-up will appear to Add Category user can add new category. Also contains the delete icon to delete the defined category for particular document.

Manage Categories

X

+ Add Category



Categories	Action
No Records Found.	

Cancel

Manage Categories

X

+ Add Category

Categories	Action
categories	 

Cancel

CUSTOM METADATA(DOCUMENTS)

Users can assign values to the mapped Metadata from this window. The assigned Metadata groups would be displayed and user can select view and provide the necessary information.

Metadata Groups

✕

+ Add Metadata Group

Metadata Group	Task
IEFCL_FERT_VD_OM	<div><div></div><div></div></div>
IEFCL_FERT_VENDOR	<div><div></div><div></div></div>

Cancel

EDIT EXTRACTED TEXT(DOCUMENTS)

The extracted text is displayed in a text editor providing the user to verify the extracted text and make corrections in the content if required.

Edit Extracted Text

✕

IBM Ecosystem Development
Intro to IBM Bluemix DevOps Services, Part 1:
Fork and deploy a simple java app.
Francisco Javier Ramos Muñoz 19th June 2015
fco_ramos@es.ibm.com (First published 19th June 2015)
Ecosystem Development, IT Specialist
IBM

In this three part introductory series on Bluemix and DevOps Services, you discover how using these products can prevent you from wasting time. You learn how to quickly and easily deploy a simple app, deploy an app that makes use of a Bluemix service. You'll even try out the web IDE (no setup required) and learn how to use agile planning tools. As a bonus to all of the knowledge you'll get by working through the examples in this series, you also get an application that checks the prices of items in online stores for you, so you don't have to surf the web to see if your favorite items are on sale!

This workshop is an adaptation of the original series written by Lauren Hayward Schaefer, but adapted to the Java language. I tried to keep all the excellent text written by Lauren as much I could, but... at the end, sincerely... I prefer to go to the beach instead of shopping.
Lauren Hayward Schaefer.

Update

Cancel

Doccept User Guide

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NOTES

Notes can be added to a particular folder/ Document via this option. Each note can be up to 2000 characters long. Users can add as many notes as required.

Notes

Name : Test_data11.xls

Size: 40.5 KB

Folder: /Root

Version: 5

Administrator 14-06-2016 12:35:26

New version 5: sdfdsf



Enter Notes Here

Sample note |

12/2000

Note: Maximum 2000 Characters allowed

Add Note

Cancel

SECURITY

Security option allows you to see and update (if the permissions are available) what users and groups have permission to a Specific document or folder. Roles can be defined in the administrator section and accordingly security can be set for a particular folder.

Security

Path: /Root/Hydrangea.jpg

Roles

Role	Read	Write	Delete	Security
ROLE_USER	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Users

User	Read	Write	Delete	Security
------	------	-------	--------	----------

Update

Cancel

To change permissions click on the "Update" button. This will display which users have read, write, delete and security permissions on the document or folder and these permissions can be changed as needed.

Read – Gives Read-only Access

Write – Allows user to modify the document

Delete – Allows the user to delete documents (will be moved to Trash)

Security – Gives the ability to assign security rights to the current document or folder to other users

Selecting "Apply changes recursively" will automatically overwrite the security permissions of all entities under the selected folder.

Recursive Permissions:

Access permissions which are added/ modified on the parent folder will be recursively applied to the child folders.

Recursive permissions will be applied in the following scenarios:

1. When the user/role is newly added to the parent folder.
2. When the existing user/role is modified which is available on both parent and child folders.
3. When the user/role is newly added to the parent folder even though the same user/role is already mapped to child folders.

Recursive permissions will **NOT** be applied in the following scenarios:

1. When the user/role is modified on the parent folder and which is not available on the child folder.

Table for easy reference:

	User/ Role Mapping		
Action	Parent	Child	Recursive
Grant	Yes	No	Yes
Modify	Yes	Yes	Yes
Modify	Yes	No	No
Grant	No	Yes	Yes

VIEW MENU FUNCTIONS

VIEW - PROPERTIES

By clicking View - > properties, a pop-up will appear showing the Document or folder properties with details such as, Name, path, history, etc.

Properties

Name

Test_data11.xls

Parent

/Root

Size

40.5 KB

History Size

130.1 KB

Created

02-06-2016 11:49:57 by Administrator

Subscribed

false

Modified

14-06-2016 12:35:26 by Administrator

File type

application/vnd.ms-excel

Keywords

Status

Available

Unique Identifier

413c02c1-bbcf-4d29-98f6-18f30b4dd7f5

Cancel

VIEW - NOTES

Same as Notes section but the Notes information is in read-only mode.

Notes ✕

Name : Test_data11.xls

Size: 40.5 KB

Folder: /Root

Version: 5

Administrator 11-07-2016 17:44:43

sample document notes

Administrator 14-06-2016 12:35:26

New version 5: sdfdsf

Cancel

VIEW - SECURITY

Same as Security section but the Security information is in read-only mode.

Security ✕

Path: /Root/Test_data11.xls

Roles

Role	Read	Write	Delete	Security
ROLE_USER	✓	✓	✓	✓

Users

User	Read	Write	Delete	Security
QCTV_USER	✓	✗	✓	✗
Comse	✓	✓	✗	✗

Cancel

VIEW – PREVIEW (Documents / Mails)

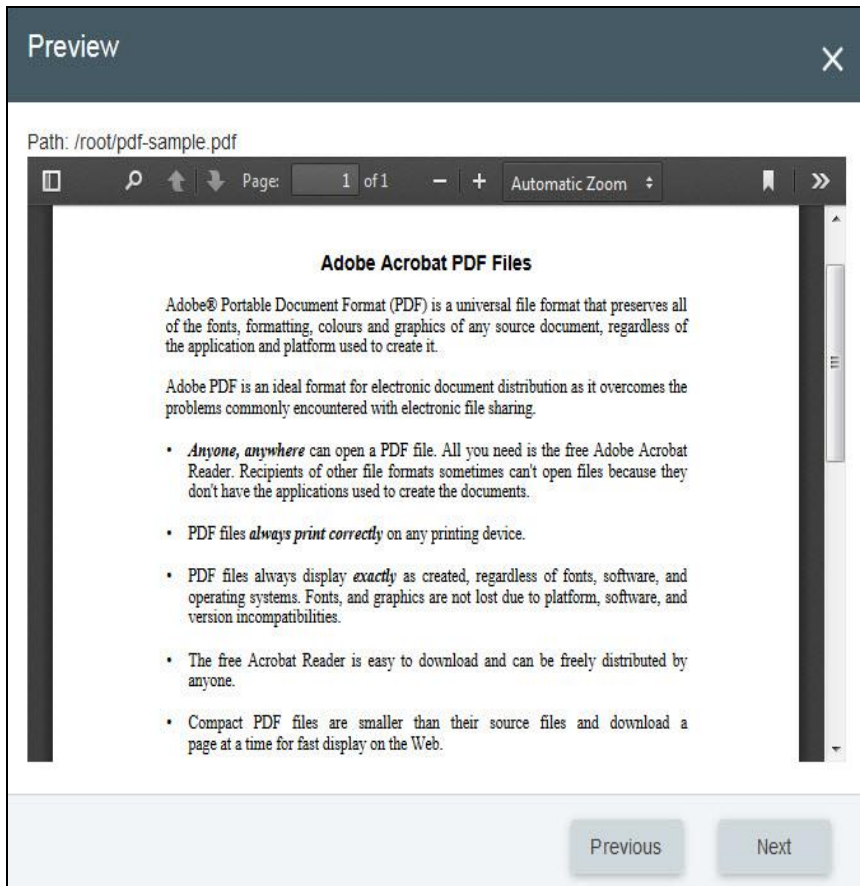
Document preview tool of Doccept provides preview of the document for selected document types. This feature needs a valid Adobe PDF browser plugin be installed for the browser used.

Following are the file types that are supported by the Preview tool.

- Word documents
- Excel files
- PowerPoint Files
- Open Office documents
- PDF files
- PNG files
- BMP files
- MPG files
- MP4 files(Video)

- Auto CAD files (.dxf files)
- Tiff files
- Outlook Messages (.msg)

PDF Preview:



MS Office Preview:

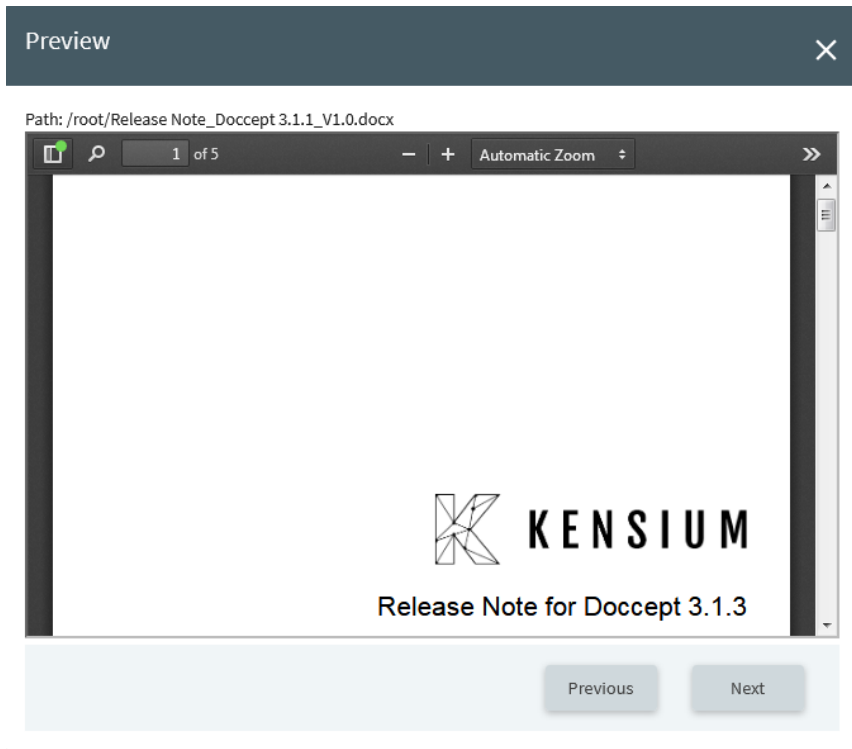
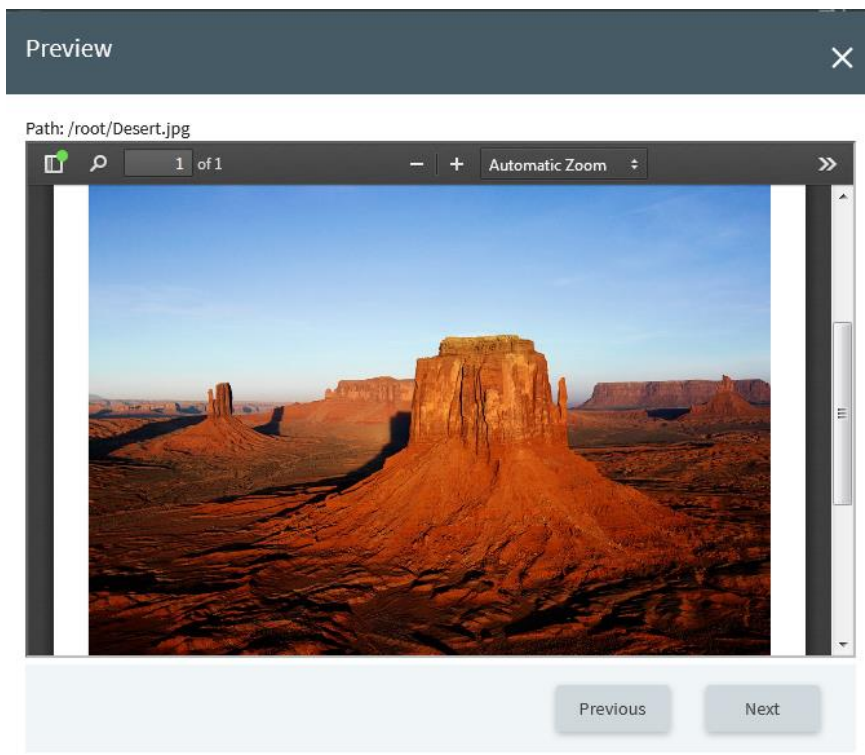
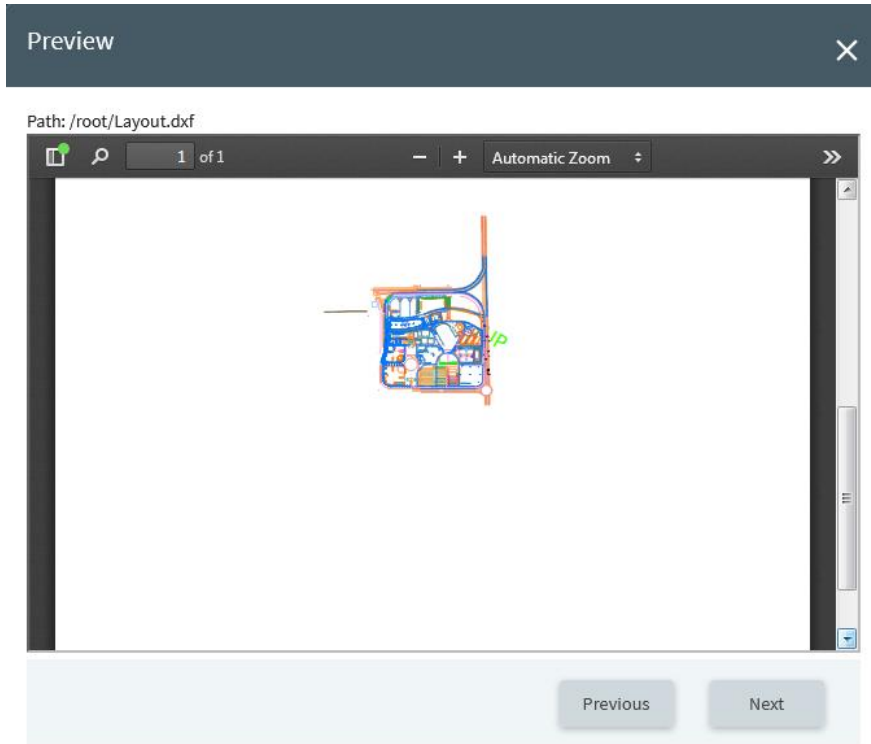


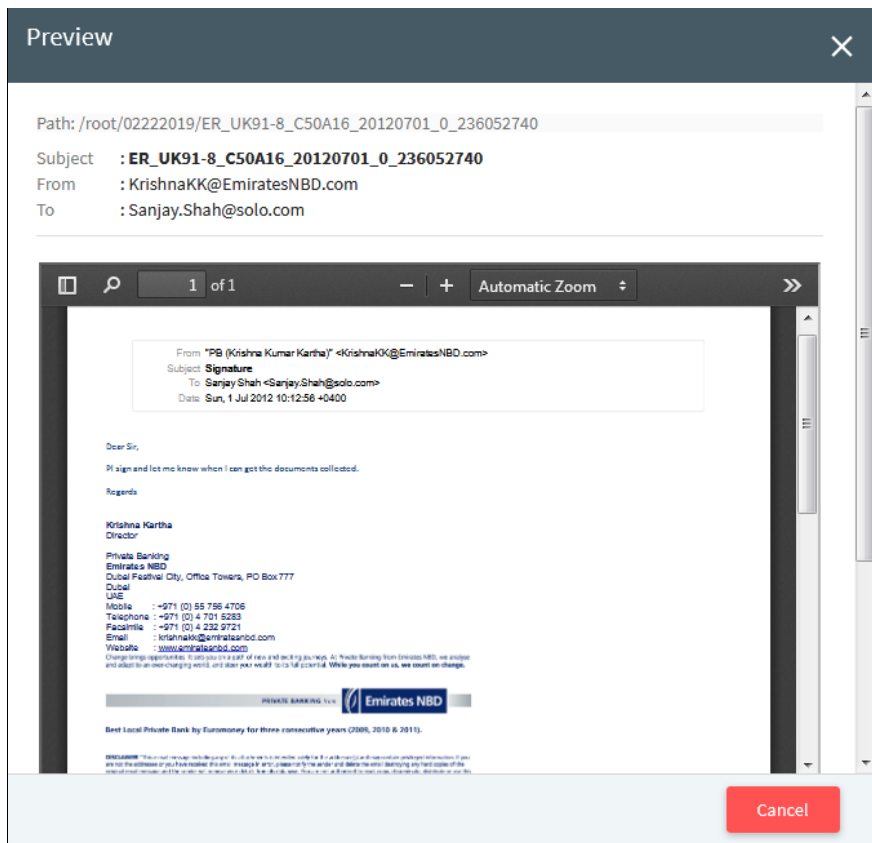
Image Files Preview:



Auto CAD Preview:



Outlook Mail Preview:



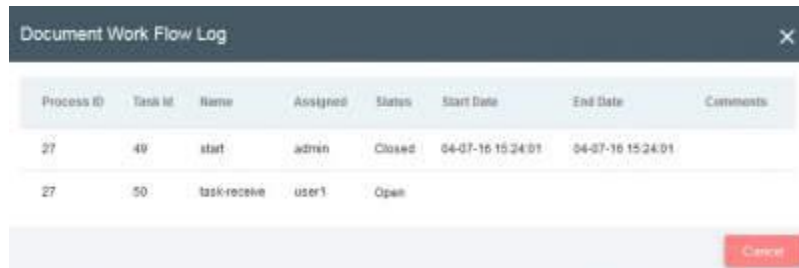
VIEW – REQUEST TO PREVIEW

This feature is enabled based on the configuration on the User Profile and when the user clicks on this option an message will be sent to all admin users with a request for download on the selected file.

Once the request is approved by the admin user, the end user will be able to preview the file till the request expires.

VIEW - WORKFLOW LOG

Displays a log of all Workflow activities on this document with details such as - when the task was started, when it was approved/rejected, updated and other user actions on the task.

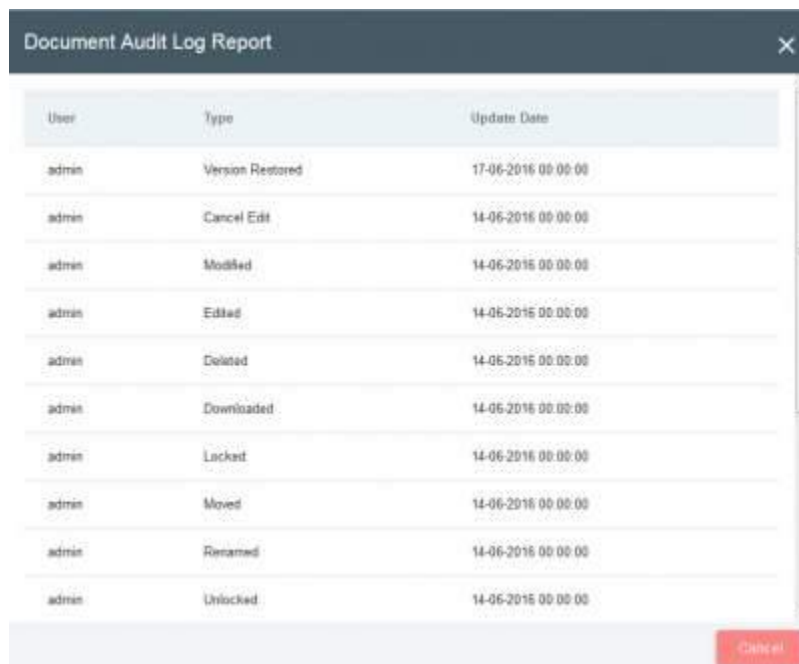


Process ID	Task Id	Name	Assigned	Status	Start Date	End Date	Comments
27	49	start	admin	Closed	04-07-16 15:24:01	04-07-16 15:24:01	
27	50	task receive	user1	Open			

Cancel

VIEW - DOCUMENT AUDIT LOG

Displays a log of all Doccept activities performed on this specific document or file.



User	Type	Update Date
admin	Version Restored	17-06-2016 00:00:00
admin	Cancel Edit	14-06-2016 00:00:00
admin	Modified	14-06-2016 00:00:00
admin	Edited	14-06-2016 00:00:00
admin	Deleted	14-06-2016 00:00:00
admin	Downloaded	14-06-2016 00:00:00
admin	Locked	14-06-2016 00:00:00
admin	Moved	14-06-2016 00:00:00
admin	Renamed	14-06-2016 00:00:00
admin	Unlocked	14-06-2016 00:00:00










Cancel

VIEW - HISTORY

Whenever a document is Updated or checked-into Doccept, a new version is created providing ability to access or restore any version of the document. Users can view all the previous document versions in the History tab. Each entry includes details of the user who has edited the document, date and time of edit, comments provided about the edit, etc. Doccept also allows a user to quickly revert to an older version (Using Restore button). User can also view an older version by just clicking the 'View' button in the respective row.

History ×

Path: /Root/Test_data11.xls

Version	Date	Author	Size	Compact History	Comment
1	02-06-2016 11:49:57	Administrator	40.5 KB	 	
2	02-06-2016 16:45:04	Administrator	67 B	 	null
3	02-06-2016 16:49:42	Administrator	8.5 KB	 	null
4	14-06-2016 12:32:28	Administrator	40.5 KB	 	null
5	14-06-2016 12:35:26	Administrator	40.5 KB		edit

Cancel

VIEW - VIEW EXTRACTED TEXT

The extracted text is displayed in a text editor in read only format.

View Extracted Text ×

IBM Ecosystem Development

Intro to IBM Bluemix DevOps Services, Part 1:

Fork and deploy a simple java app.

Francisco Javier Ramos Muñoz 19th June 2015

fco_ramos@es.ibm.com (First published 19th June 2015)

Ecosystem Development, IT Specialist

IBM

In this three part introductory series on Bluemix and DevOps Services, you discover how using these products can prevent you from wasting time. You learn how to quickly and easily deploy a simple app, deploy an app that makes use of a Bluemix service. You'll even try out the web IDE (no setup required) and learn how to use agile planning tools. As a bonus to all of the knowledge you'll get by working through the examples in this series, you also get an application that checks the prices of items in online stores for you, so you don't have to surf the web to see if your favorite items are on sale!

This workshop is an adaptation of the original series written by Lauren Hayward Schaefer, but adapted to the Java language. I tried to keep all the excellent text written by Lauren as much I could, but... at the end, sincerely... I prefer to go to the beach instead of shopping.

Lauren Hayward Schaefer:

Cancel

SEARCH SCREEN COMPONENTS

SEARCH CRITERIA



Search criteria screen provides the user with a option to build own search queries. The following attributes are provided for facilitating dynamic search query generation:

- Parameter
- Operator
- Value
- Condition

Parameter:

User can search for files based on the following parameter values:

Title Name: This could be a Document name, Folder name or Mail subject.

File Content: Would be applicable for only searchable files. The following are the types of files that can be searched on the file content.

- Word documents
- Open office documents
- PDF files
- Excel Files
- Rich Text files
- Text files
- PPT etc.

File Category: User can search based on the File category. Category can be selected with the help of Category browser.

File Keywords: User can search based on the File keywords.

User Id: User can type in the first few characters of a user id, and the system will display a list of matching values.

Date Range: Files uploaded within a date range selected by the user would be displayed

File Folder: User can search based on the File folder. Category can be selected with the help of folder browser.

File Types: Select file types can be selected form the list provided under the value.

Metadata:



Setup Criteria: Click on the Setup criteria button a panel with the following attributes is displayed:

- Group
- Field
- Operator
- Value

Mail Attributes: User can search for mails based on the From Address, To Address and Subject



Operators: The following values are provided under the Operator drop down that can be applied for selected Parameter.

- Equal To
- Like
- Start With
- End With
- Between
- Greater Than
- Less Than
- Greater Than Equal To
- Less Than Equal To

Value :

Text Field: This is displayed for the parameters such as Title name, File Keywords, User Id.

Text Area: This is applicable for parameter File Content.

Date Fields: This is applicable for Date range parameter.

Folder Browser: This is applicable for File Folder parameter. User is provided with the Folders Tree structure.

Category Browser: This is applicable for File Category parameter. User is provided with the Category Tree structure.

Condition :

AND: To provide logical AND operator between search conditions. eg: Condition1 AND Condition2

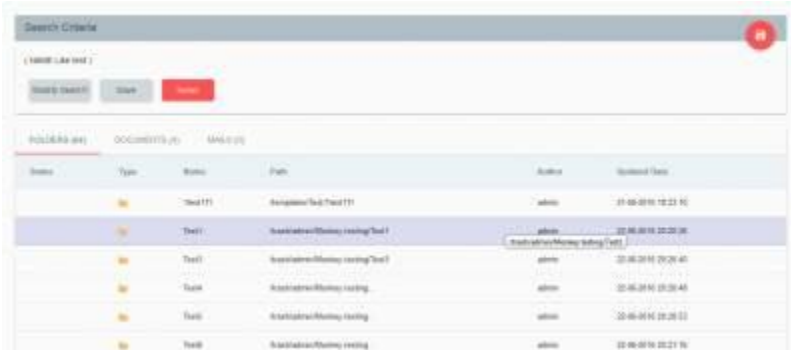
OR: To provide logical OR operator between search conditions. eg: Condition1 OR Condition2

CLOSE WITH AND: To provide Close brace with AND operator. eg: (Condition1) AND (Condition2)

CLOSE WITH OR: To provide Close brace with OR operator. eg: (Condition1) OR (Condition2)

CLOSE: To Close the Group. eg: (Condition1)

SEARCH RESULTS



Status	Type	Status	Path	Action	Updated Date
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10
Success	Test1	Success	Test1	admin	20-08-2019 12:22:10

The search criteria can be saved for future use. Click on the Save search button and the system will bring up a dialog box where the user can provide a unique search name to save the search criteria for future reference.

SAVE SEARCH

Save Search

Search Name

test data

Save

Close

The search criteria can be saved for future use. Click on the Save search button and the system will bring up a dialog box where the user can provide a unique search name to save the search criteria for future reference.

MANAGE SAVE SEARCH

User can click on “Saved Searches” link at the top of the search page to view the saved searches run the search with a single click for updated results. Also one can sort these saved searches and delete the entries.

Manage Saved Searches		
Search Name	Author	Task
search a	admin	⋮
Meta data	admin	⋮
Metadata_rakesh	admin	⋮
Mails	admin	⋮

REPORTS

Over Due Report:

Lists all the folders on which notifications or alerts are not handled as per the scheduled intervals and the work is overdue.

Coming Due Report:

Lists all the upcoming notifications/tasks within the time-period defined by the user. This report can also be exported into an excel sheet.

New Uploads Report:

This report lists out the files uploaded to Doccept based on the Date range provided as input criteria. This report would be available for both Admin users and normal users. For normal users the files uploaded by the specific user and at admin level there would be an extra input parameter to select user.

Available:

Admin Level

User Level

Input Parameters:

- Date Range: Date range within which the documents were uploaded.
- From Date
- To Date
- User: Only at Admin level. List of doccept users to be populated in a drop down.

Output Values:

- File Name
- Author
- Version
- Size
- Update Date
- File Path

Disk Space Usage Report:

This report lists out the user wise disk space usage in Doccept. This report would be available for admin users.

Available:

Admin Level

Input Parameters: None

Output Values:

- User Name
- User Quota (GB)
- Used Space (GB)
- No of Files uploaded

Document Edit Report:

This report lists out the documents checked out by a particular user in Doccept. This report would be available for normal users.

Available:

User Level

Input Parameters: None

Output Values:

- File Name
- Author
- Version
- Size
- Update Date
- File Path

Document Audit Log Report:

This report lists out the recent activity/ audit log for a particular file in Doccept. This report would be available for normal users.

Available:

User Level

Input Parameters:

- Date Range: Date range within which the documents were uploaded.
- From Date
- To Date
- File Folder: File folder selection.
- File Name: Documents in the selected file folder should be populated in this dropdown.

Output Values:

- File Name
- Activity
- Perform By
- Update Date

Subscription Report:

This report lists out the recent documents subscribed by a particular user in Doccept. This report would be available for normal users.

Available: User Level

Input Parameters: None

Output Values:

- File Name
- Auther
- Version
- Size
- Update Date
- File Path

Document Expiry Report:

This report lists out the files in Doccept based on their Expiry date. This report would be available for both Admin users and normal users. For normal users the files uploaded by the specific user and at admin level there would be an extra input parameter to select user.

Available:

- Admin Level
- User Level

Input Parameters:

- Date Range: Date range within which the documents where uploaded.
- From Date
- To Date
- User: Only at Admin level. List of doccept users to be populated in a drop down.

Output Values:

- File Name
- Author
- Version
- Size
- Update Date
- File Path
- Expiry Date

File Summary Report:

File Summary report list out the number of documents based on the metadata group.

Available:

- Admin Level
- User Level

Input Parameters: None

Output Values:

- Metadata Group
- Number of Documents

CUSTOM REPORTS

Report Configuration:

Custom reports provides a platform for the end user to design his own custom reports



Accessible from: Reports > Custom Reports

Custom Reports - Report Designer

Report Name*

R123

Report Title*

Sample Report

Report Template*

Portrait

Data Set*

Documents

☒ File Name
 ☒ Owner
 ☒ File Upload Date
 ☐ Last Updated Date
 ☐ Lock Status

☒ All
 ☐ Show Criteria

Execute

Save

Reset

- **Report Name:** Provide a text box to provide a unique Report setup name. This will be used in case the report is saved for future use
- **Report Title:** Report Title that needs to be displayed on the Top of the first page in the report
- **Report Template:** Provide drop down with the predefined report template names. 2 report templates named Potrait and Landscape are provided.
- **Report Data:**
 - **Data Set:** To provide drop down with pre-defined data groups such as Documents, Folders, Mails, Metadata, Users etc.,
 - **Data Fields selection:** Multi select drop down or list to be provided with the predefined list of fields as defined for each Data set selected. Details of the Data groups and corresponding fields list is provided in the next sections.
- **Input Criteria:** Users can create dynamic criteria query (similar to search module), the list of parameters would be as per the Data set selected. Maximum of 3 dynamic rows can be provided in the screen.
 - **Attribute:** Provide a list of Attributes from the selected Data set selected.
 - **Operator:** Provide values
 - “Equals To”, “Like”, “Starts with” and “Ends with” for text values .
 - “Equals To”, “Greater than” and “Less than” for numeric values.
 - “Between” for date values.
 - **Value:** Text box for all the attributes other than Date attribute. For date attribute display 2 date pickers.
- **Save Report:** To provide a feature to save this report definition and execute the same at a later date.
- **Manage Saved Reports:** To provide a link on the right top corner to display the saved reports.
- **Execute:** Execute button will generate the report on the above parameters and redirect the output to new window and an option to export to “PDF/ Word/ Excel/ CSV/ ODT/ ODS” is provided in the new report window.
- **Manage Saved Report:** On click of the icon on the right top corner in the screen will list all the saved reports as saved by

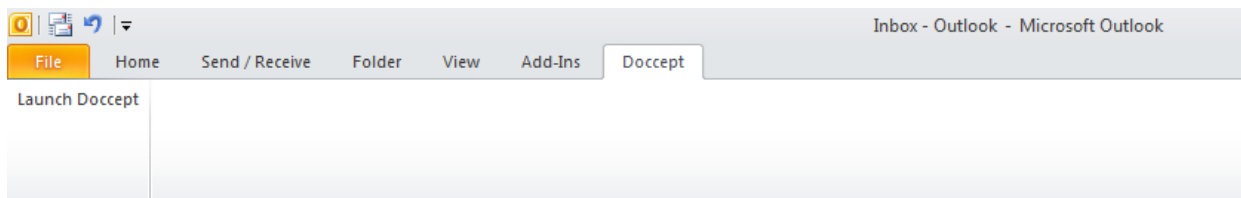
the logged in user.

- **Reset:** Reset button will clear the values entered in the form.

DOCCEPT EXTENSIONS

MS OUTLOOK ADDINS

The Doccept Addin for Microsoft Outlook is available from within the ribbon section of Outlook once it is installed. This is available for use only on Outlook running on Microsoft Windows Operating Systems.

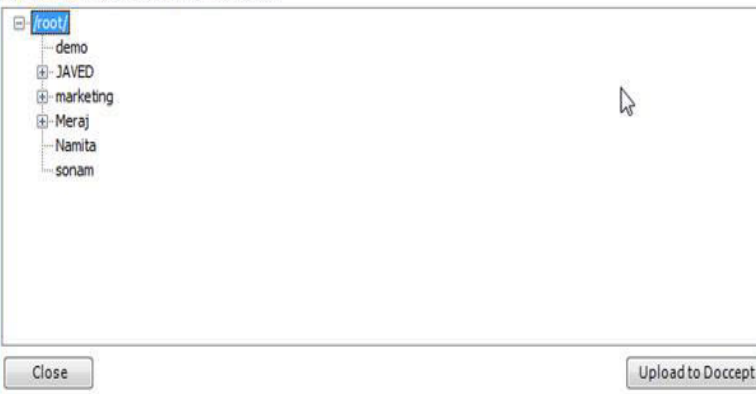


Clicking on the Doccept button on the toolbar brings up the following interface. Once the credentials are provided, when the user clicks on Login, the application checks to make sure that the credentials are working fine and presents a message illustrating the same:

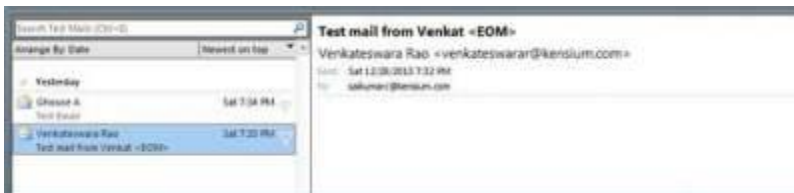


Once the user clicks on the OK button displayed for the confirmation message, the application activates the “Show Folders” button. Clicking on this button brings up the following screen which displays a list of all the folders that are accessible or available for this particular user from within Doccept:

Available folder(s) in Doccept for user login:



You are now ready to upload the selected email from within Outlook to this instance of Doccept. Assume that the user has selected the following email from within Outlook.



Now if the user clicks on the “Upload to Doccept” button within the Addin window, the application brings up the following confirmation message so that the user can make sure that the right Email has been selected.



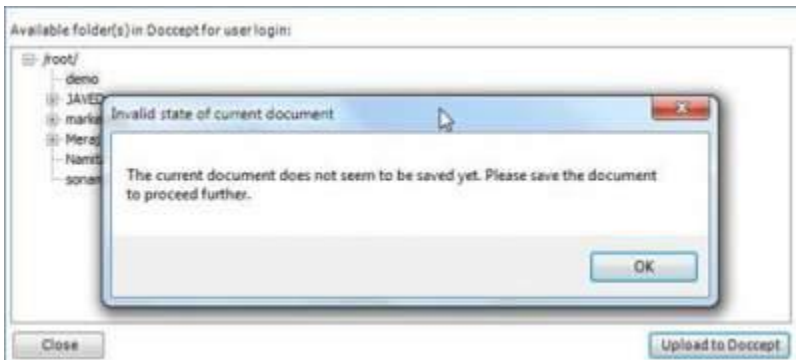
If the user clicks on the “Yes” button, this email is uploaded to Doccept within the selected folder on the above interface. The email now shows up within Doccept as follows:



If the user now attempts to upload the same email to Doccept again, the application confirms with the user if the document version should be upgraded with the new version of the email document since the same already exists.

MS WORD & MS EXCEL ADDINS

The Microsoft Word and Microsoft Excel Addins function very similar to the Microsoft Outlook Addin. The only difference is that Word and Excel uploads the current document that is open within the tool. If a Document is not saved before clicking the Upload button, application prompts the user to first save the document and then click on the Upload button.



Once the user saves the document, the same can then be uploaded to Doccept. If the same document already exists in Doccept at the selected folder, the application prompts the user to confirm if they wish to upload a new version of the document.