

# User Manual for Vivaan-Armor Document Manager Brought to you by Aan Systems



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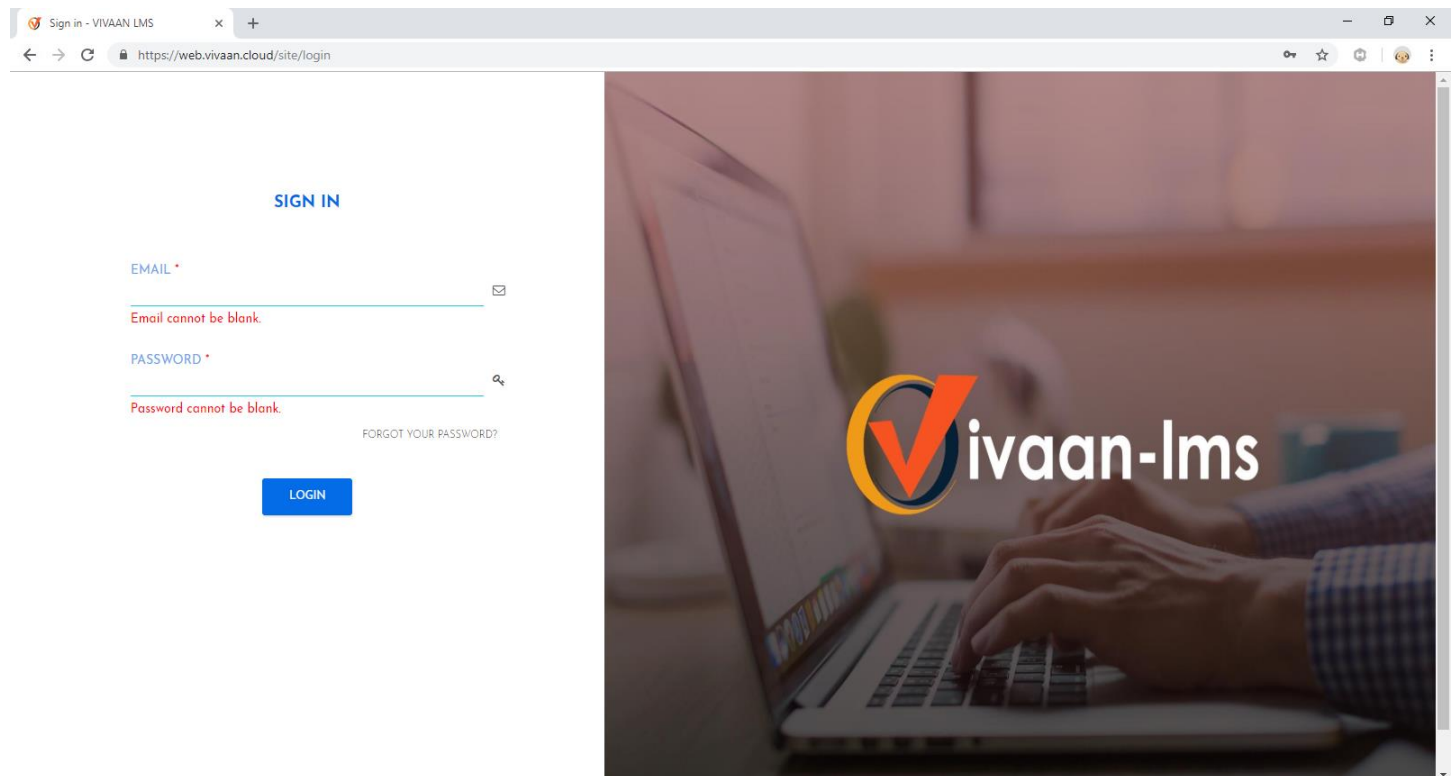
**Purpose:** The purpose of this How-To manual is to make the ease of navigation through the Vivaan-Armor Document Manager a little easier. There are also video tutorials to supplement your learning that will be available throughout the Vivaan LMS.

## **Step-By-Step Process:**

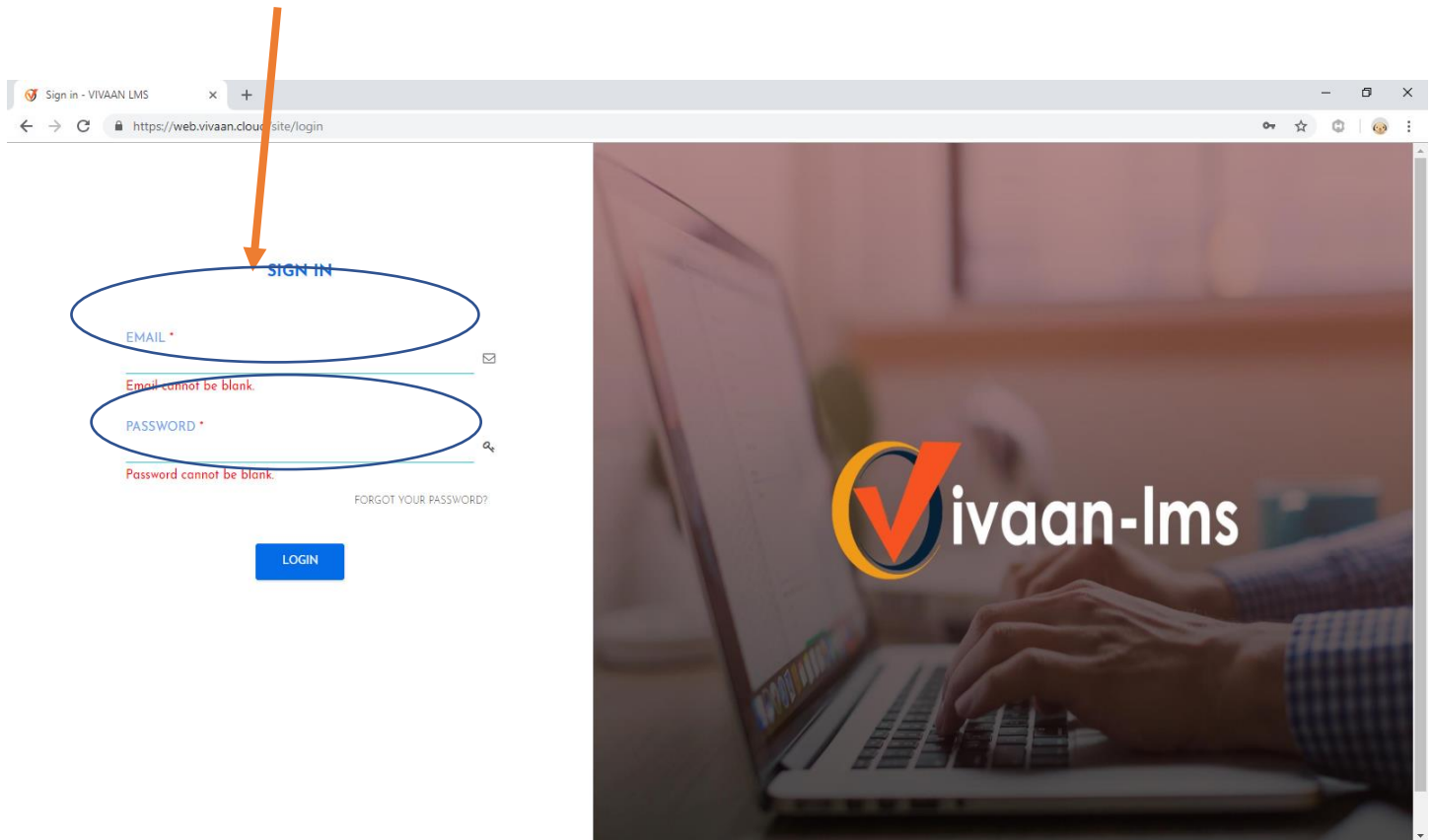
- 1) Pull up a new browser and enter the following in the URL: <https://web.vivaan.cloud>



- 2) This is the first screen you will see after inputting the URL above:

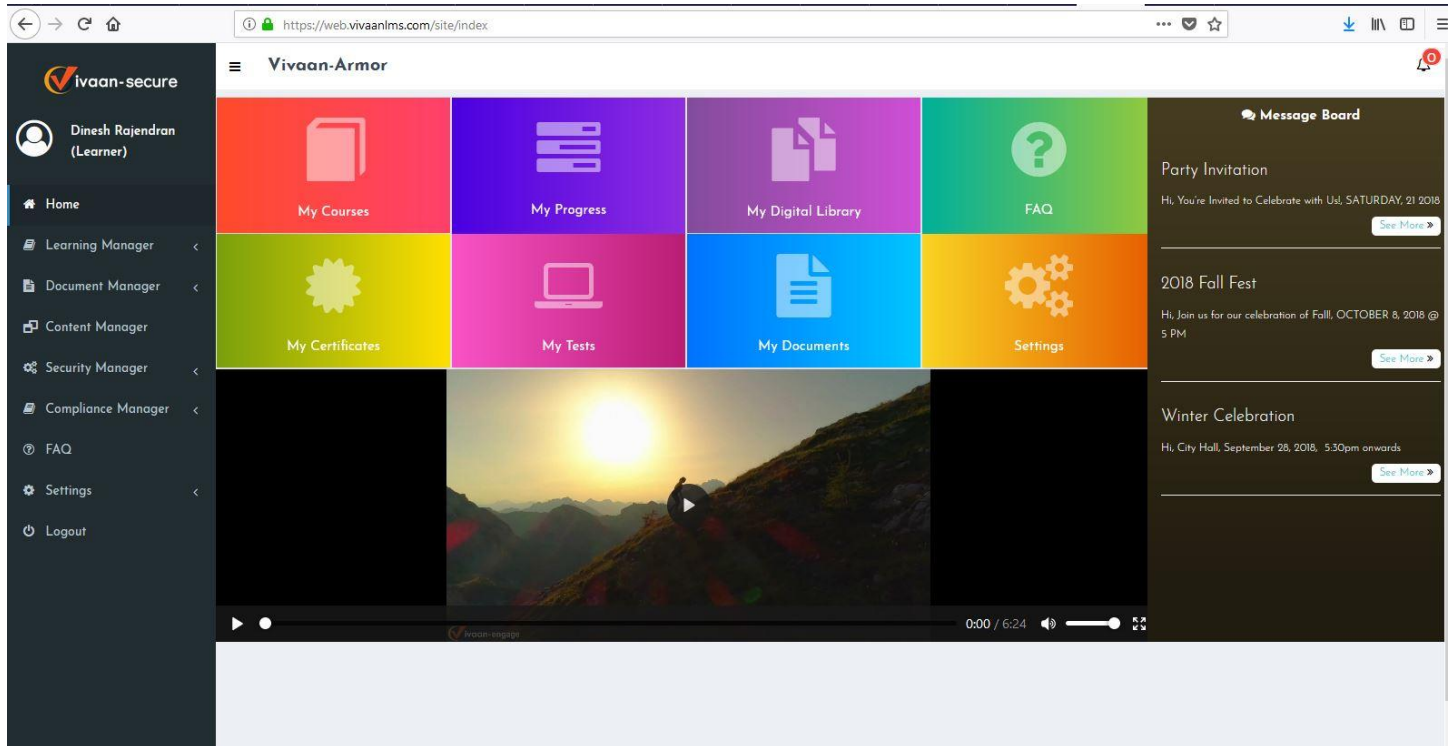


3) Enter in the email address and password that your admin or corporate leader has provided to you.

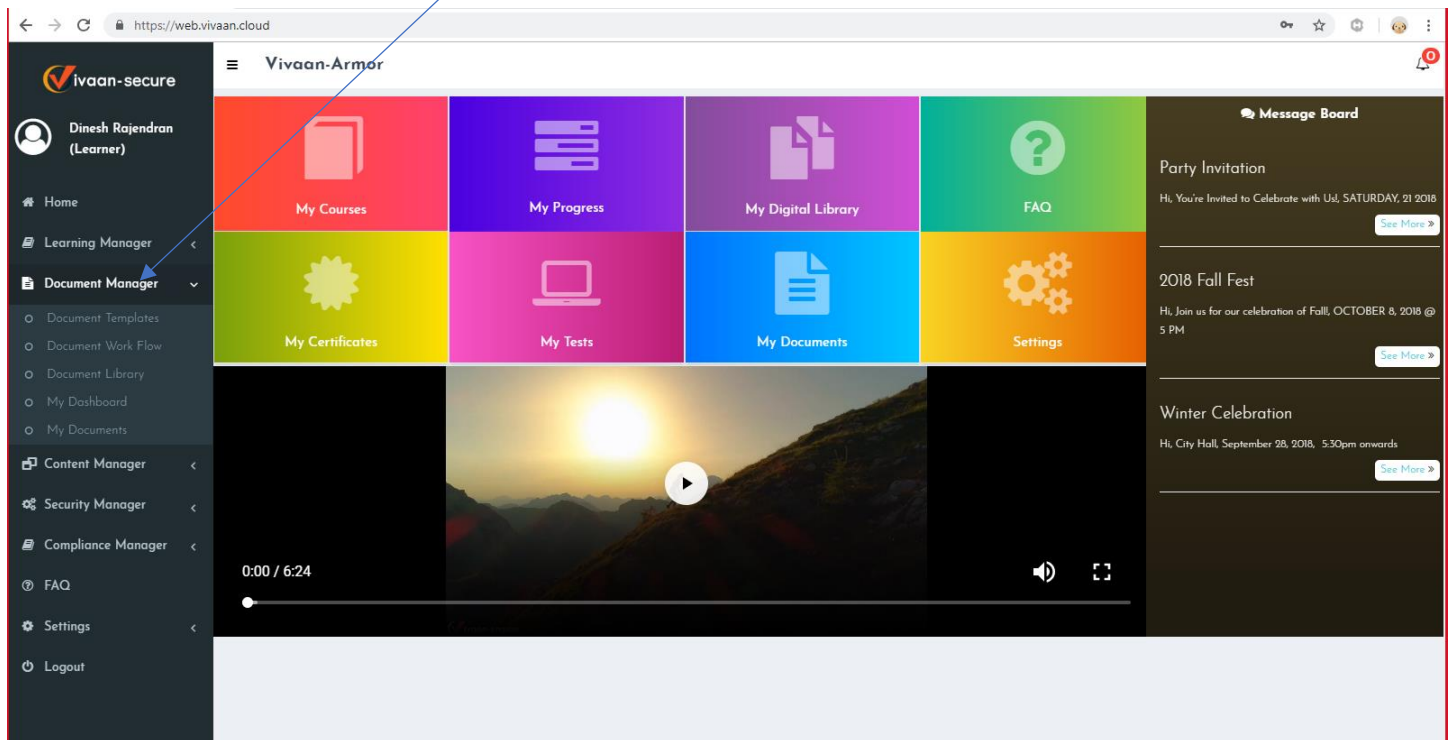


Each learner or super admin, branch manager, etc., will have their own login and password. Each level of management will have different privileges in terms of being able to create classes, accounts, learners depending on the level of power that they have in the hierarchy of the LMS. This hierarchical assignment is determined by your company and the individual learners, and admin are assigned responsibilities and/classes accordingly.

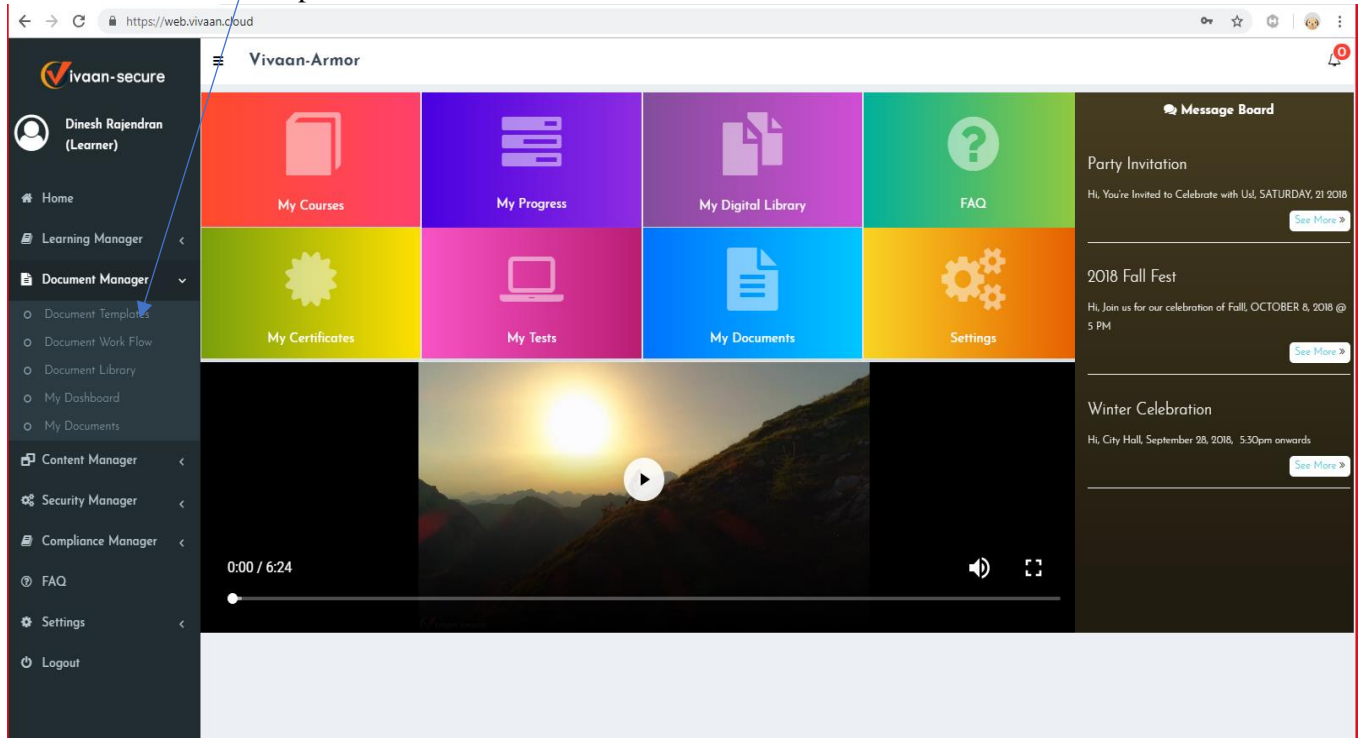
- 4) After successful login, you should see the main home screen of the Vivaan Learning Management System (LMS).



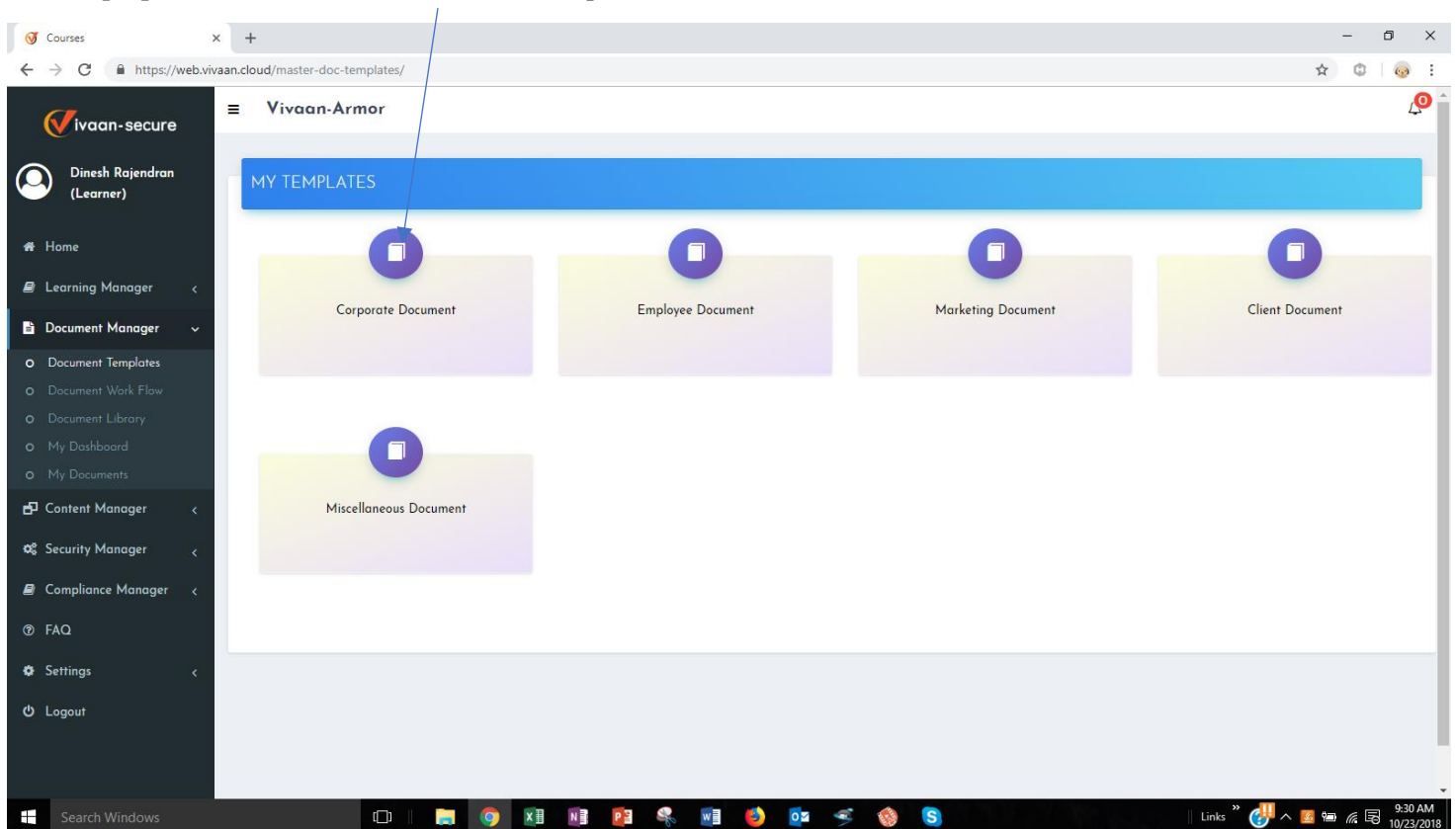
- 5) Click on Document Manager and notice that the menu expands to show: Document Templates, Document Work Flow, Document Library, My Dashboard, and My Documents.



6) Click on Document Template.



7) The following screen will be shown after clicking on Document Template under Document Manager. Document templates are given by a super admin or corporate admin from the backend. The document templates will have a variety of templates under each of the categories: Corporate Document, Employee Document, Marketing Document, Client Document, and Miscellaneous Document. You can click under any of the categories. For purposes of a demo, let's click on the Corporate Document.



- 8) After Clicking on the Corporate Document button, you are shown the following screen. Click on the download icon under any of the documents to download a Microsoft Word Editable Template document to customize to your liking.

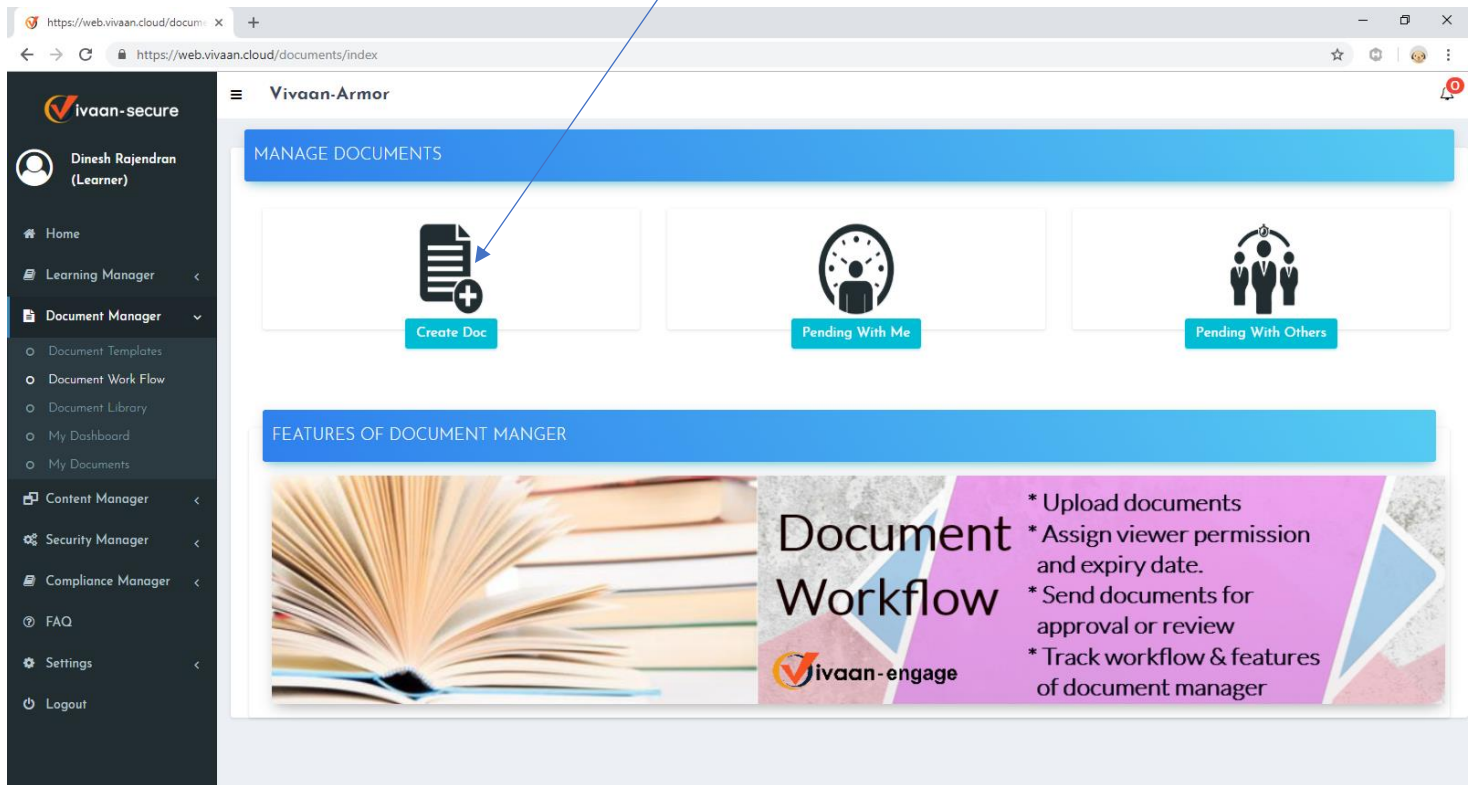
The screenshot displays the Vivaan-Secure web application interface. On the left is a dark sidebar with the user's name 'Dinesh Rajendran (Learner)' and a list of navigation options: Home, Learning Manager, Document Manager, Content Manager, Security Manager, Compliance Manager, FAQ, Settings, and Logout. The main content area is titled 'CORPORATE DOCUMENT' and features a 'Templates' section. This section lists several document templates, each with a download icon: 'AAN-GENERAL-MSA', 'AAN-SYSTEMS-NDA-NC-AGREEMENT-JULY-2018', 'NDA sample', and 'Non Disclosure Agreement'. The right side of the screen shows a preview of the 'MASTER SERVICES AGREEMENT' document, which includes the company logo 'aan', the name 'AAN SYSTEMS, INC.', and the website 'http://www.aansystems.com'. The document text outlines the terms of a Master Services Agreement, including the definition of 'Client' and 'Vendor', and a list of services provided by the vendor.

- 9) Click on Document Workflow to see how a document gets created in the first place.

The screenshot shows the Vivaan-Armor web application interface. The left sidebar is similar to the previous one, but the 'Document Manager' section is expanded, showing 'Document Templates', 'Document Work Flow', 'Document Library', 'My Dashboard', and 'My Documents'. The 'Document Work Flow' option is highlighted with a blue arrow. The main content area is titled 'MY TEMPLATES' and displays five document templates as cards: 'Corporate Document', 'Employee Document', 'Marketing Document', 'Client Document', and 'Miscellaneous Document'. Each card has a document icon and a title. The bottom of the screen shows a Windows taskbar with various application icons and the system clock indicating 9:30 AM on 10/23/2018.



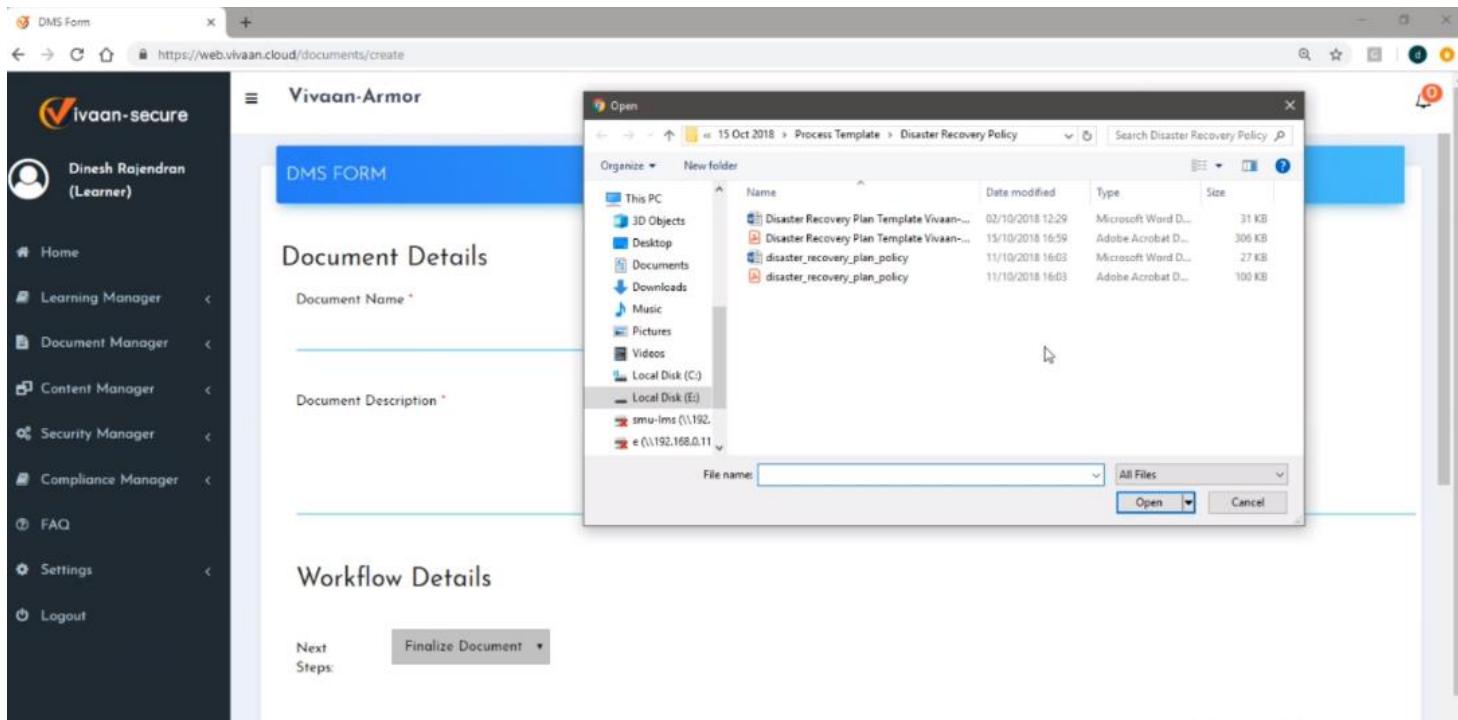
10) This screen has features for creating a document, Pending with Me (Documents that pend with you for signature/approval), and Pending with Others (Documents that Pend with Others for Approval/Signatures). Now click on Create Document to make a document.



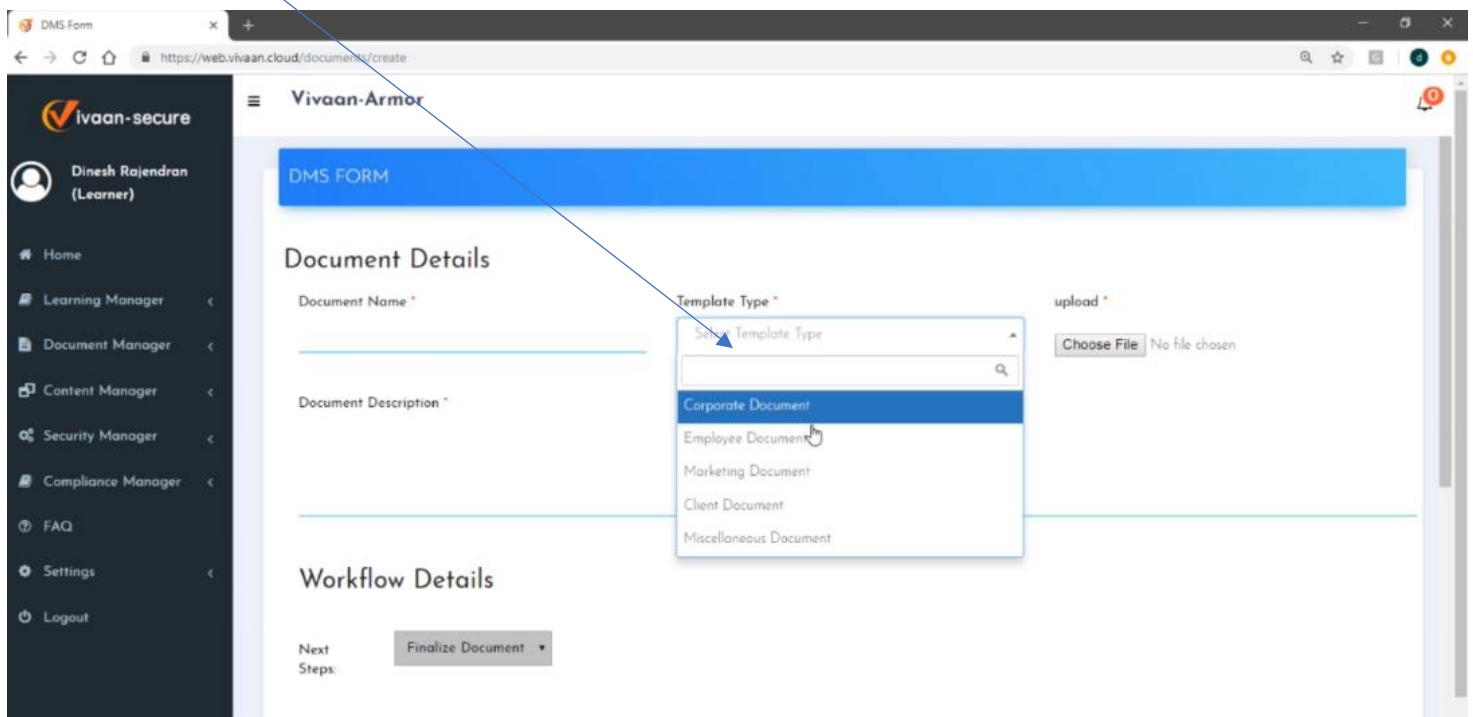
11) This form shows the details for creating a new document.  
You can type a new document name or upload a document from your computer or other source.

The screenshot shows the 'DMS FORM' for creating a new document. The form is divided into two main sections: 'Document Details' and 'Workflow Details'. In the 'Document Details' section, there are fields for 'Document Name', 'Document Description', and 'Author Comments'. There is also a 'Template Type' dropdown menu and an 'Upload' section with a 'Choose File' button. In the 'Workflow Details' section, there is a 'Next Steps' dropdown menu, a 'Document Expiry Date' field, and two fields for 'View only' and 'View And Download' permissions. The Vivaan-Armor logo and navigation sidebar are visible on the left.

12) This screen shows a document being selected from the computer source.



13) “Template Type” shows the different categories that you can choose for the type of document that you are making.



14) Remember to fill out a document description and any author comments if applicable.

The screenshot shows the 'DMS FORM' creation interface in Vivaan-Armor. The left sidebar identifies the user as Dinesh Rajendran (Learner) and lists navigation options. The main form is divided into two sections: 'Document Details' and 'Workflow Details'. In the 'Document Details' section, there are input fields for 'Document Name', 'Document Description', and 'Author Comments'. A 'Template Type' dropdown menu is also present. An 'upload' section includes a 'Choose File' button and the text 'No file chosen'. The 'Workflow Details' section features a 'Next Steps' dropdown menu currently set to 'Finalize Document', a 'Document Expiry Date' field, and two 'View only' dropdown menus for selecting who can view or view and download the document.

15) Once the document has been created the author can choose to finalize the document or assign for review. Assign a review means that it is assigned to another person to review or reject the document.

This screenshot shows the 'Workflow Details' section of the 'DMS FORM' creation page. The 'Next Steps' dropdown menu is open, displaying three options: 'Finalize Document', 'Finalize Document', and 'Assign For Review'. The 'Assign For Review' option is highlighted with a mouse cursor. The 'Document Details' section is visible in the background, showing the 'Document Name', 'Template Type', 'Document Description', and 'Author Comments' fields. The 'upload' section shows the 'Choose File' button and the text 'No file chosen' and 'File Name cannot be blank'.



16) Choose a workflow expiry date.

The screenshot shows the Vivaan-Armor document creation interface. The left sidebar contains the Vivaan-secure logo and a user profile for Dinesh Rajendran (Learner). The main content area has a 'Workflow Details' section. A blue arrow points to the 'Workflow Expiry Date' field, which is currently empty. A date picker is open, showing the month of October 2018. The date 23 is highlighted. The interface also includes fields for 'Document Description', 'Author Comments', 'Assign For Review', and 'Select User To Assign'.

Workflow Details

Next Steps: Assign For Review

Workflow Expiry Date \*

Assign For Review \*

Select User To Assign

17) All digital documents will have expiry dates to make sure that redundant and sensitive data is not lost. There are two types of expiry dates. There is an expiry date for reviewing and after finalizing, expiry date will also be there.

The screenshot shows the Vivaan-Armor document creation interface. The left sidebar contains the Vivaan-secure logo and a user profile for Dinesh Rajendran (Learner). The main content area has a 'Workflow Details' section. A date picker is open, showing the month of October 2018. The date 23 is highlighted. The interface also includes fields for 'Document Description', 'Author Comments', 'Assign For Review', and 'Select User To Assign'.

Workflow Details

Next Steps: Assign For Review

Workflow Expiry Date \*

Assign For Review \*

Select User To Assign

18) Choose a person to assign for review.

The screenshot shows the Vivaan-Armor document creation interface. The left sidebar contains the user profile 'Dinesh Rajendran (Learner)' and navigation links: Home, Learning Manager, Document Manager, Content Manager, Security Manager, Compliance Manager, FAQ, Settings, and Logout. The main content area is titled 'Vivaan-Armor' and includes a 'Select Template Type' dropdown, a 'Choose File' button with a warning 'No file chosen' and 'File Name cannot be blank', and text input fields for 'Document Description' and 'Author Comments'. The 'Workflow Details' section shows 'Next Steps' with a button 'Assign For Review', a 'Workflow Expiry Date' field with a calendar icon, and an 'Assign For Review' section with a dropdown 'Select User To Assign'.

19) Assign access clearance for others to access your document for “View Only” and “View and Download”.  
Document flow and approvals are tracked along with allowing users access to data only on a need basis (“view only” and “view and download”).

The screenshot shows the Vivaan-Armor document creation interface at the 'Finalize Document' step. The left sidebar is identical to the previous screenshot. The main content area shows 'Next Steps' with a button 'Finalize Document', a 'Document Expiry Date' field with a calendar icon, and two sections for access clearance: 'View only' and 'View And Download'. Each section has a dropdown 'Select Who Can Only View Document' and 'Select Who Can View And Download Document' respectively. There is also a 'Security For Documents' dropdown set to 'Restricted'. At the bottom right, there are 'CANCEL' and 'CREATE' buttons.

20) Vivaan-Armor allows you to manage data effectively. Data stored on the portal is categorized as Restricted (Extremely sensitive), Confidential, Internal-use and Public-use (low sensitivity). Choose the appropriate category for the document that you are creating.

Workflow Details

Next Steps: Finalize Document

Document Expiry Date \*

Restricted  
Confidential  
Internal Use  
Public  
Restricted

View And Download \*

Select Who Can View And Download Document

CANCEL CREATE

21) Documents can be “Pending with Me” (waiting for you to approve) or “Pending with Others” (documents waiting on others to approve). The appropriate documents will populate below depending on if you have pending approval documents or not.

MANAGE DOCUMENTS

Create Doc Pending With Me Pending With Others

#	Document Name	Document Type	Author	Assigned To	Status	Workflow Expiry Date	Actions
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Status can be approved or rejected.

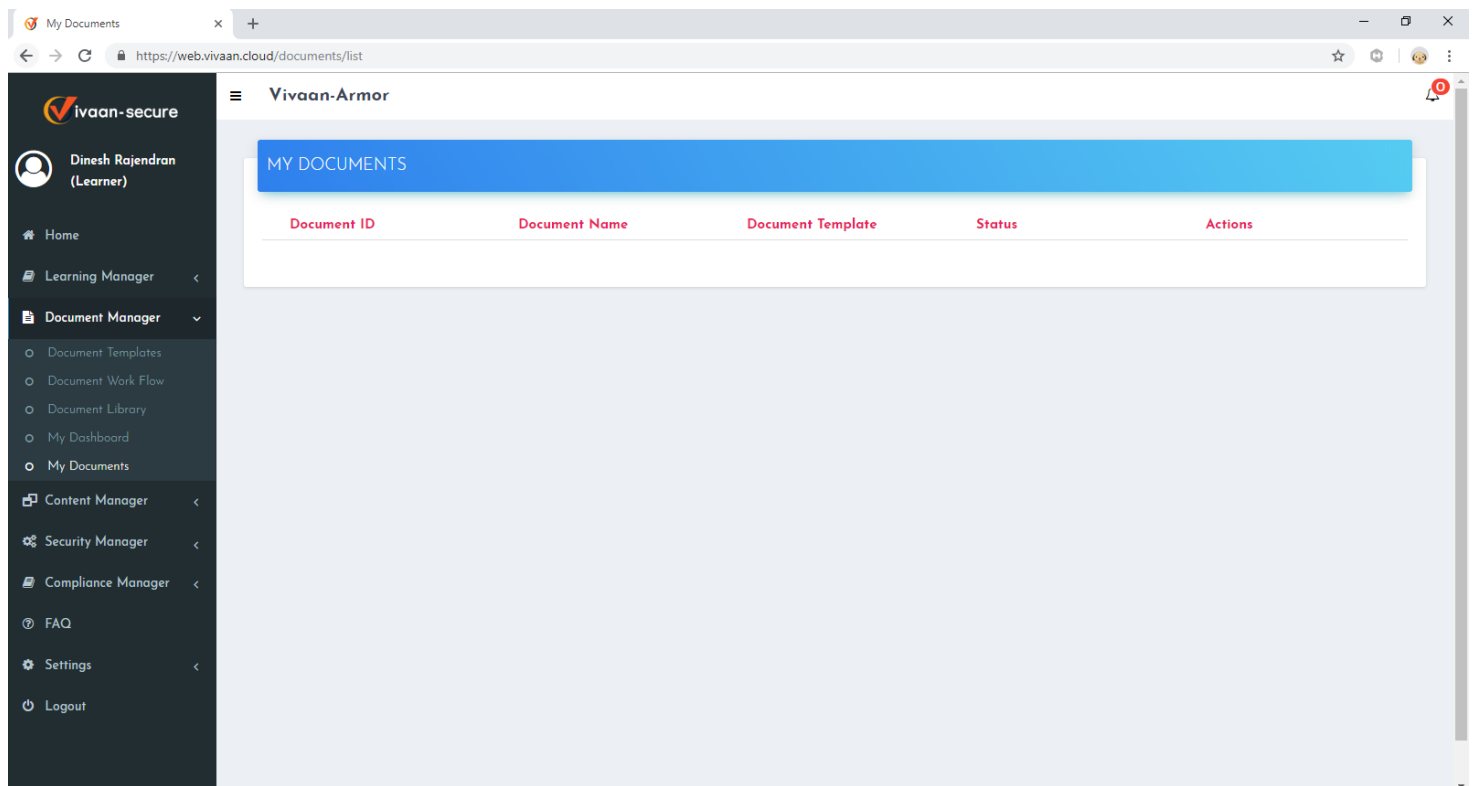
22) In here when the documents populate, you can click to finalize the document. Once you click on finalize the document, the pop up will come up as either view or view and download, depending on the clearance that was assigned to the user.

The screenshot shows the 'MANAGE DOCUMENTS' dashboard in the Vivaan-Armor application. The left sidebar contains the 'ivaan-secure' logo and a user profile for 'Dinesh Rajendran (Learner)'. The main content area has a blue header 'MANAGE DOCUMENTS' and three cards: 'Create Doc' (document icon), 'Pending With Me' (clock icon), and 'Pending With Others' (group of people icon). Below these cards is a table with the following headers: #, Document Name, Document Type, Author, Status, Workflow Expiry Date, and Actions. The table body is currently empty.

23) The document library contains the document that has been finalized by others will populate up in here.

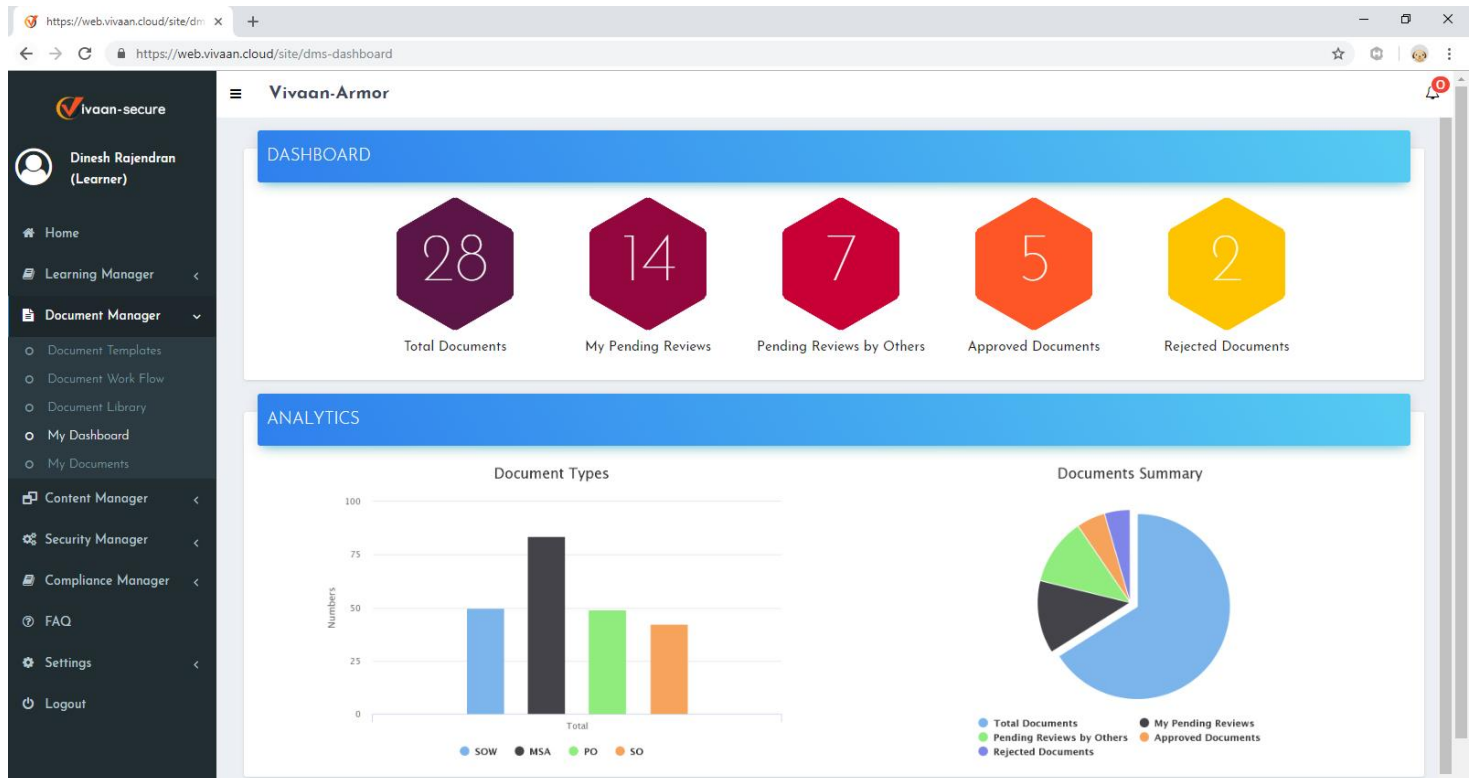
The screenshot shows the 'FINALIZED DOCUMENTS' dashboard in the Vivaan-Armor application. The left sidebar is identical to the previous screenshot, showing the 'ivaan-secure' logo and user profile for 'Dinesh Rajendran (Learner)'. The main content area has a blue header 'FINALIZED DOCUMENTS' and a large empty white box below it, intended for displaying finalized documents.

24) The document in which the user 1 has created. The user can download their documents for their personal use.



## 25) My Dashboard of Document Manager

“My Pending Reviews” will have details from “Pending with Me” section, where the user 2 has assigned documents for YOU to review. Approved Documents – This represents the number of documents approved by user 2. User 1 is the original person that created the document and assigned it to user 2 or approve or reject. Rejected Documents – This represents the number of documents rejected by user 2.



26) Analytics of My Dashboard – shows the document types in a bar graph and the document summary in a pie chart for easy visual interpretation.

