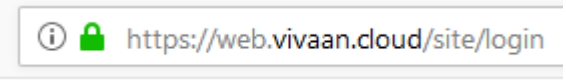
User Manual for Vivaan-Armor Document Manager Brought to you by Aan Systems

How-To Manual ©Vivaan-Armor and Aan Systems, V1.0, 10-23-2018

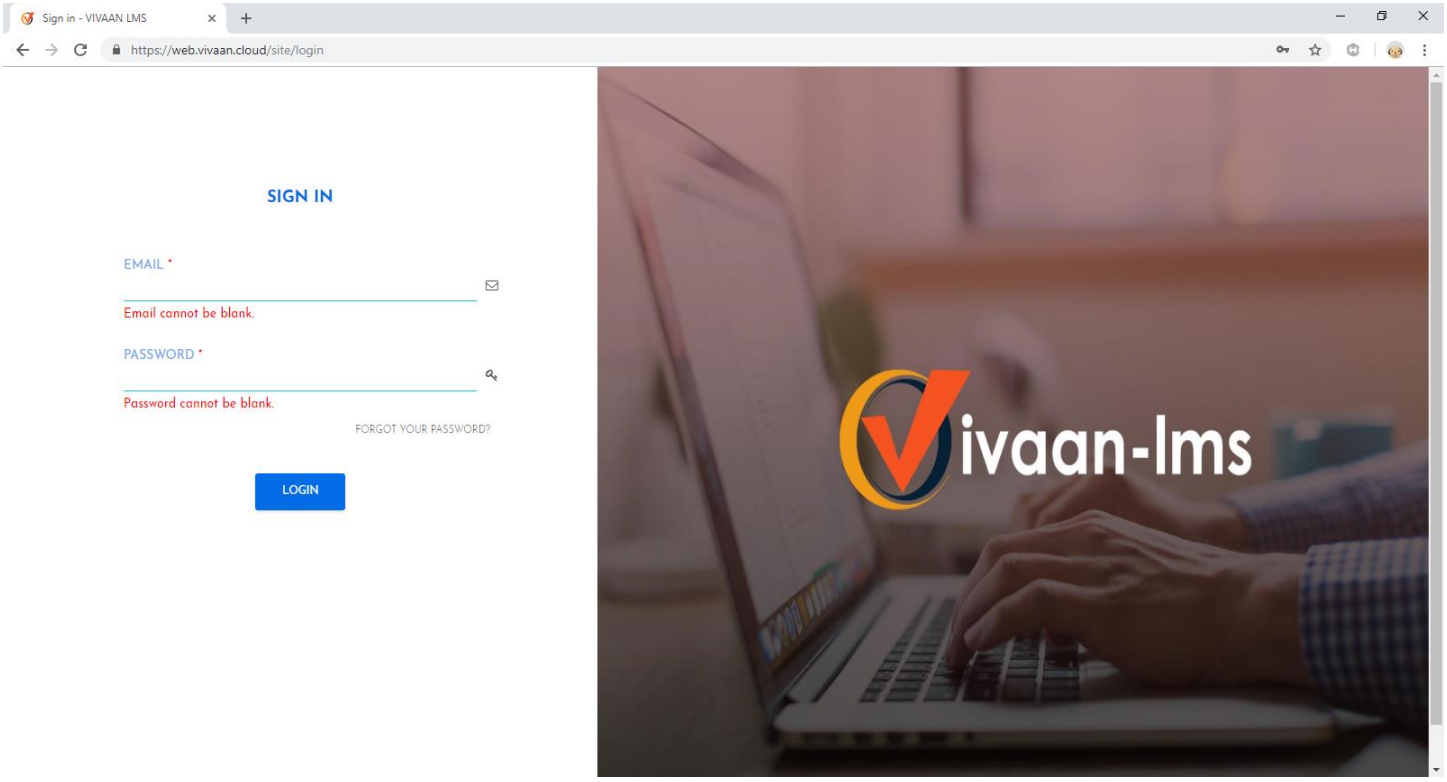
Purpose: The purpose of this How-To manual is to make the ease of navigation through the Vivaan-Armor Document Manager a little easier. There are also video tutorials to supplement your learning that will be available throughout the Vivaan LMS.

Step-By-Step Process:

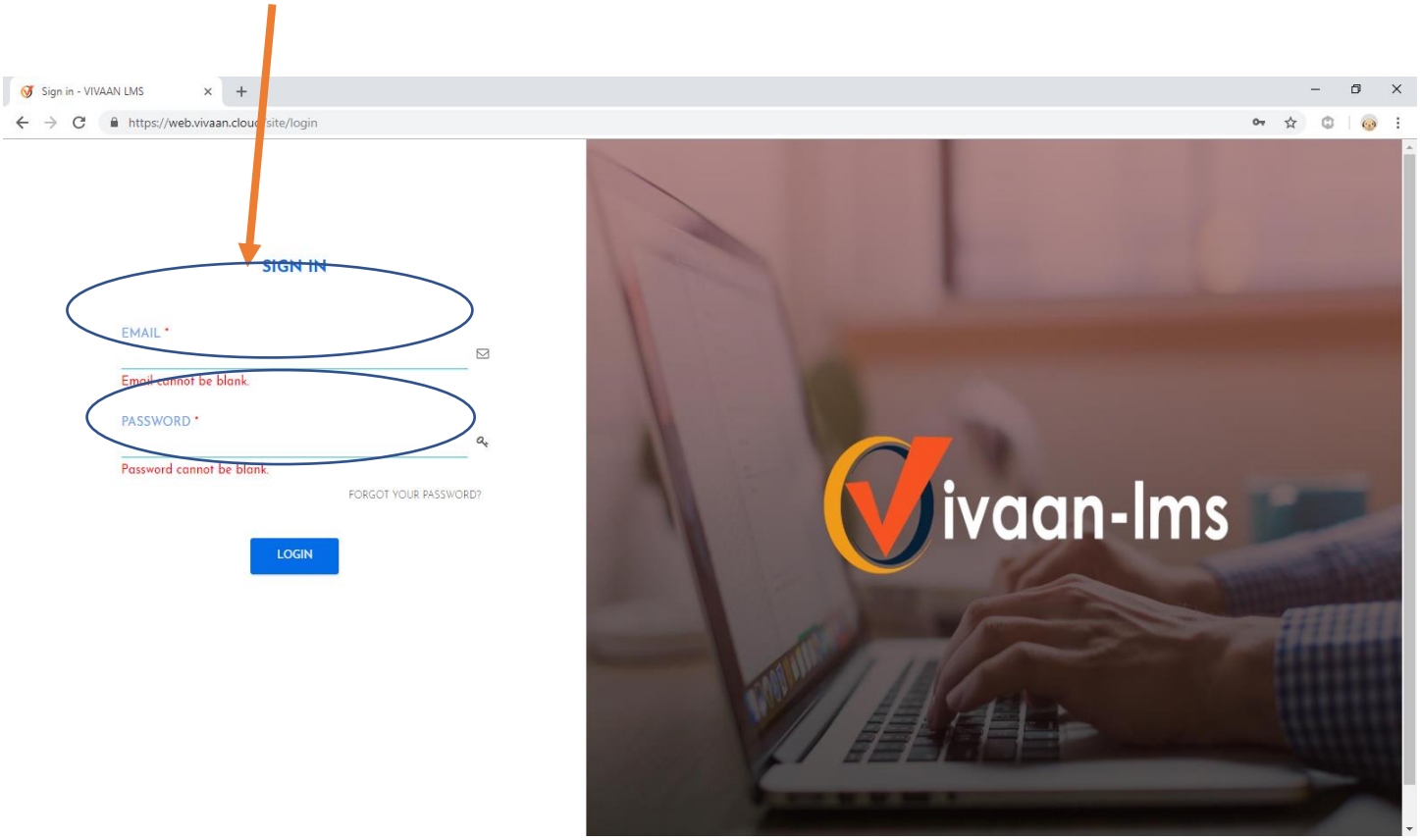
1) Pull up a new browser and enter the following in the URL: https://web.vivaan.cloud



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

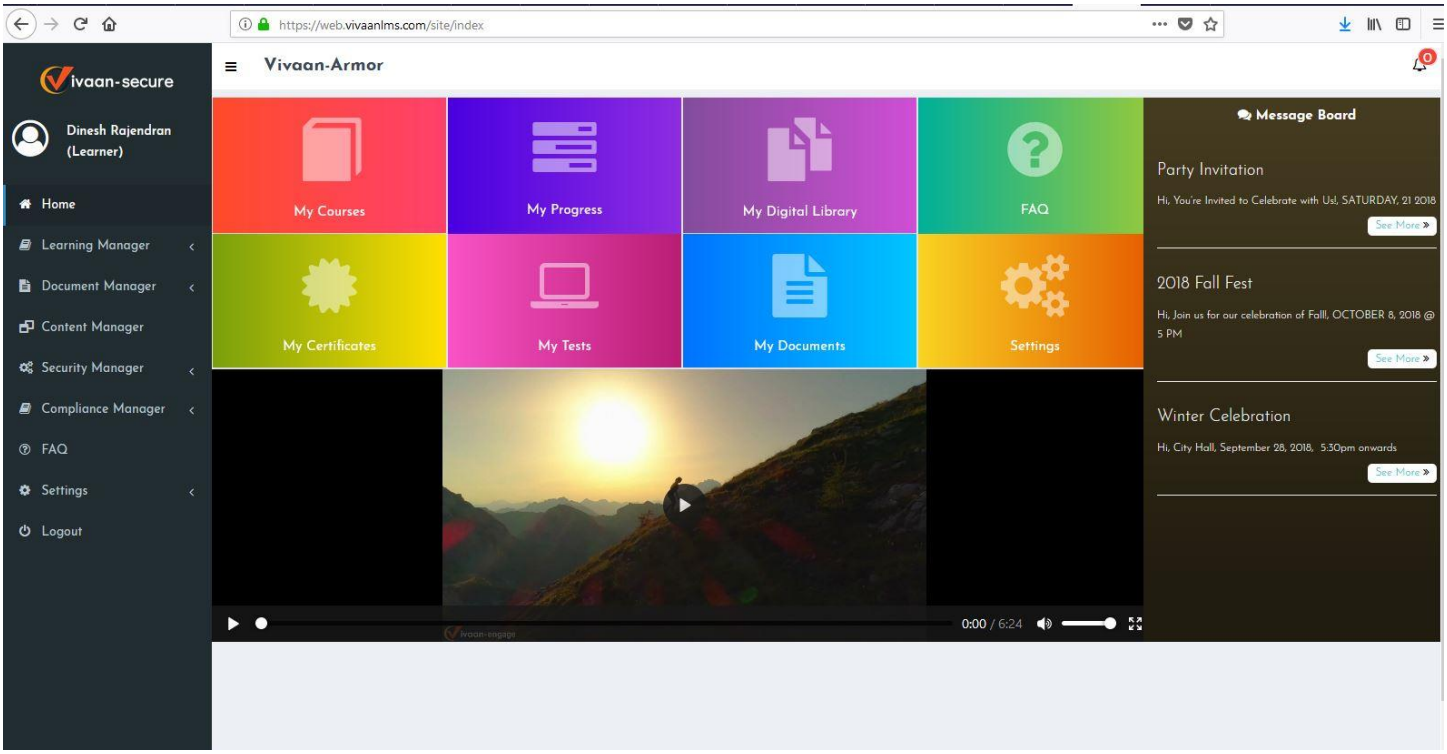


3) Enter in the email address and password that your admin or corporate leader has provided to you.

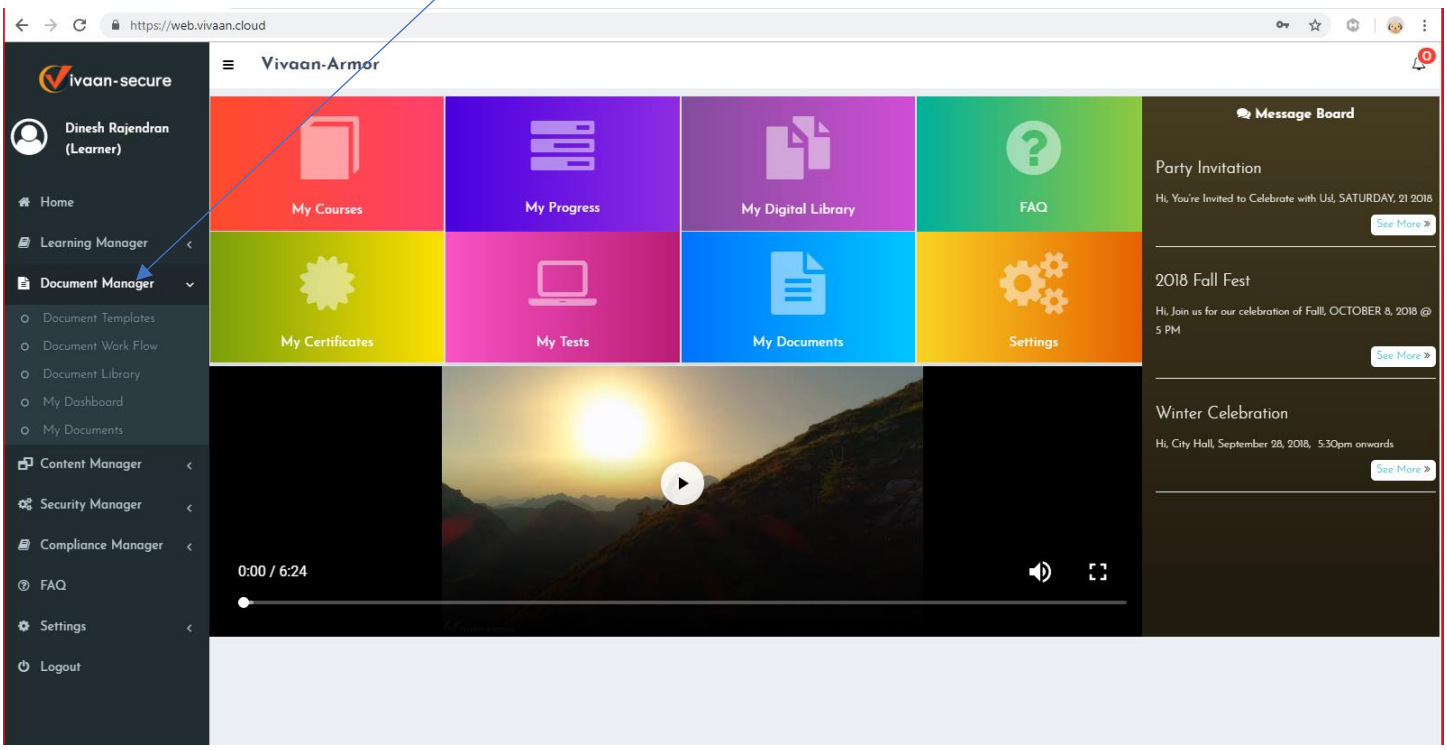


Each learner or super admin, branch manager, etc., will have their own login and password. Each level of management will have different privileges in terms of being able to create classes, accounts, learners depending on the level of power that they have in the hierarchy of the LMS. This hierarchical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

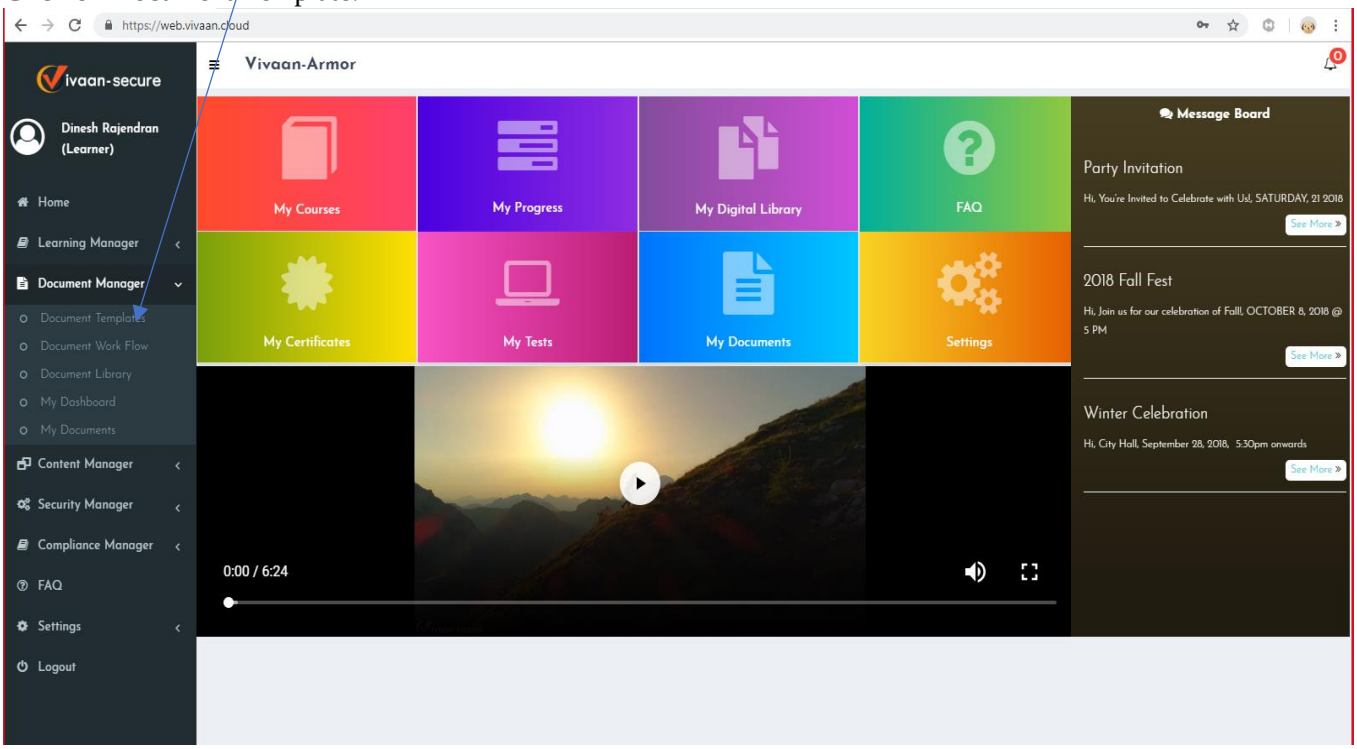
4) After successful login, you should see the main home screen of the Vivaan Learning Management System LMS).



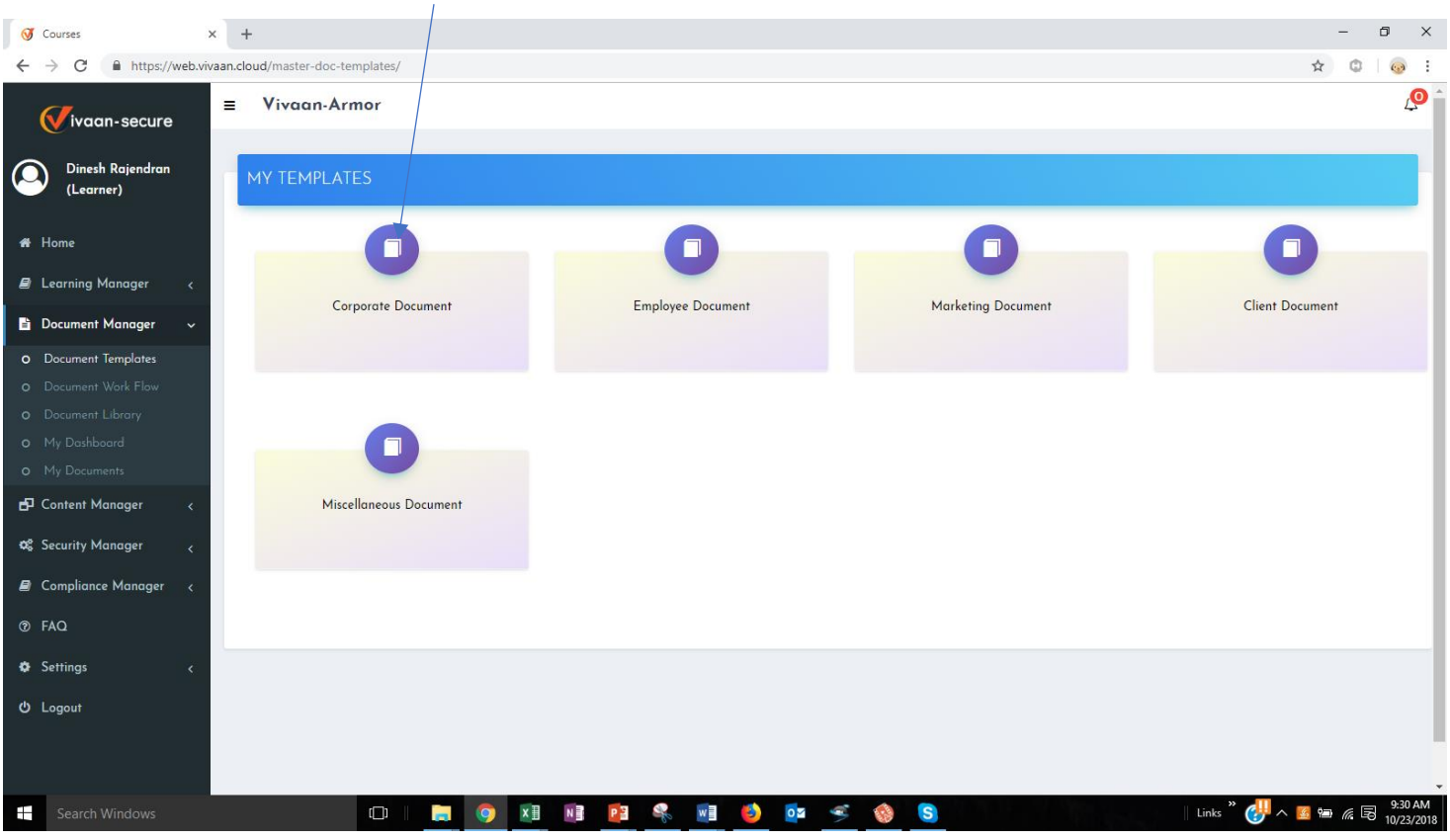
5) Click on Document Manager and notice that the menu expands to show: Document Templates, Document Work Flow, Document Library, My Dashboard, and My Documents.



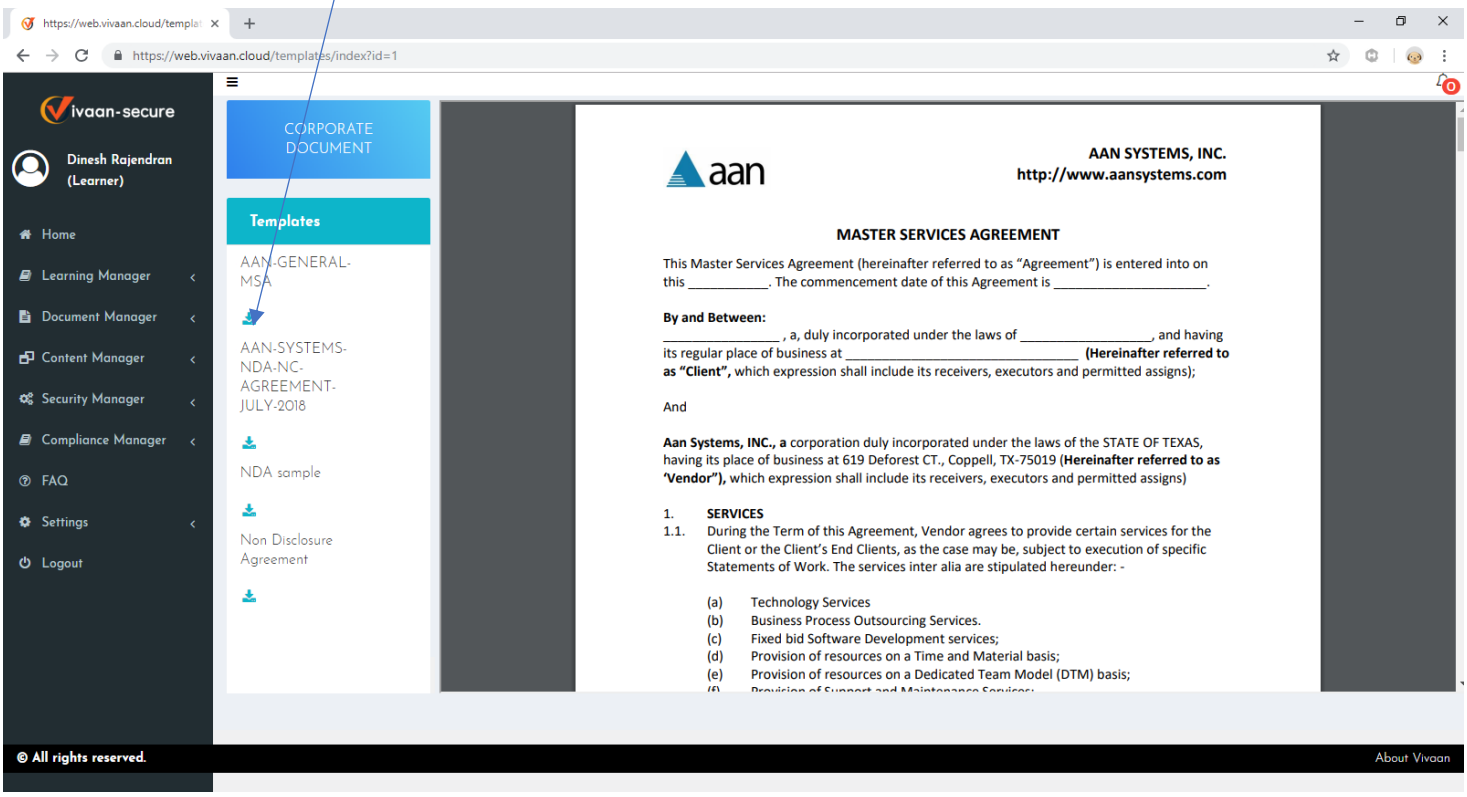
6) Click on Document Template.



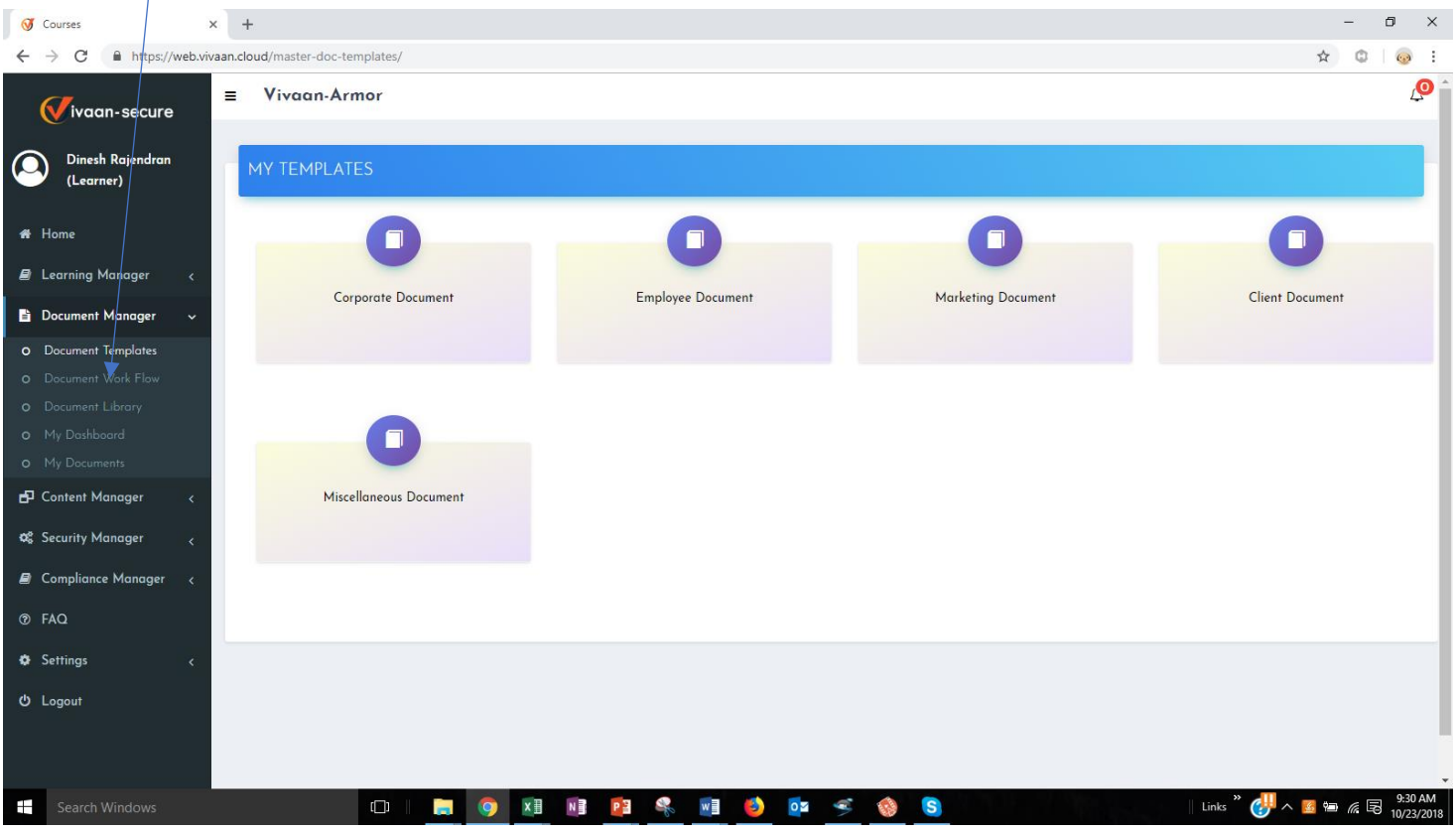
7) The following screen will be shown after clicking on Document Template under Document Manager. Document templates are given by a super admin or corporate admin from the backend. The document templates will have a variety of templates under each of the categories: Corporate Document, Employee Document, 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.



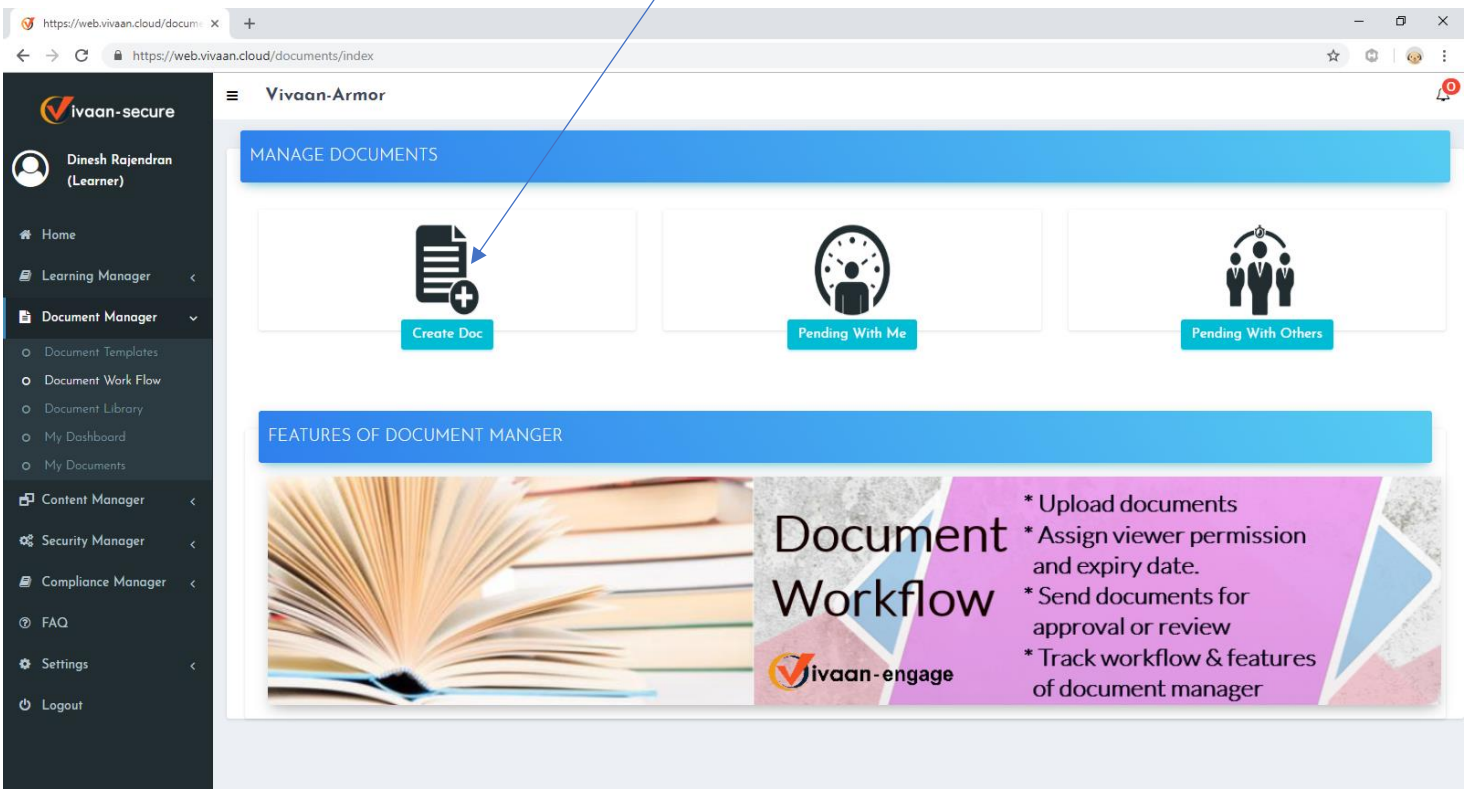
8) After Clicking on the Corporate Document button, you are shown the following screen. Click on the download icon under any of the documents to download a Microsoft Word Editable Template document to customize to your liking.



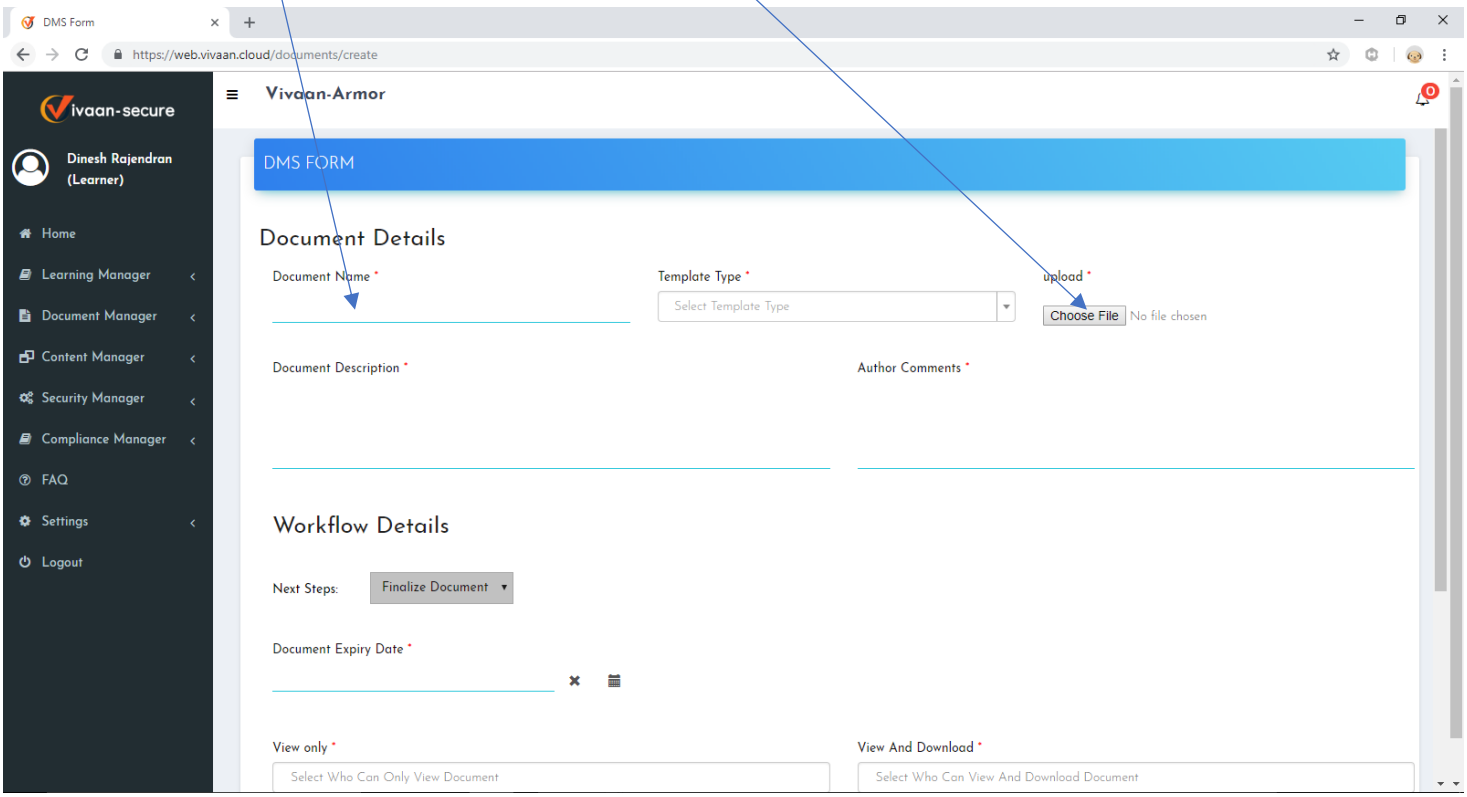
9) Click on Document Workflow to see how a document gets created in the first place.



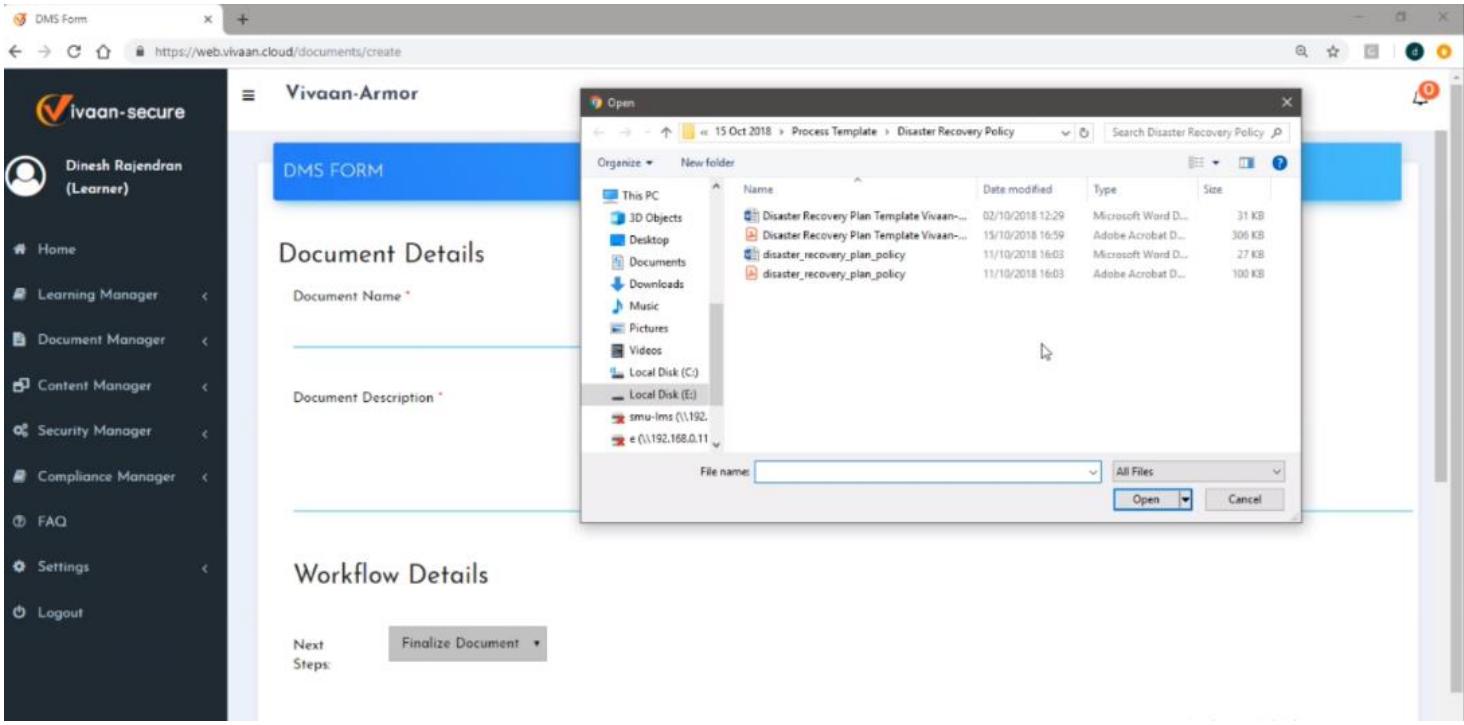
10) This screen has features for creating a document, Pending with Me (Documents that pend with you for signature/approval), and Pending with Others (Documents that Pend with Others for Approval/Signatures). Now click on Create Document to make a document.



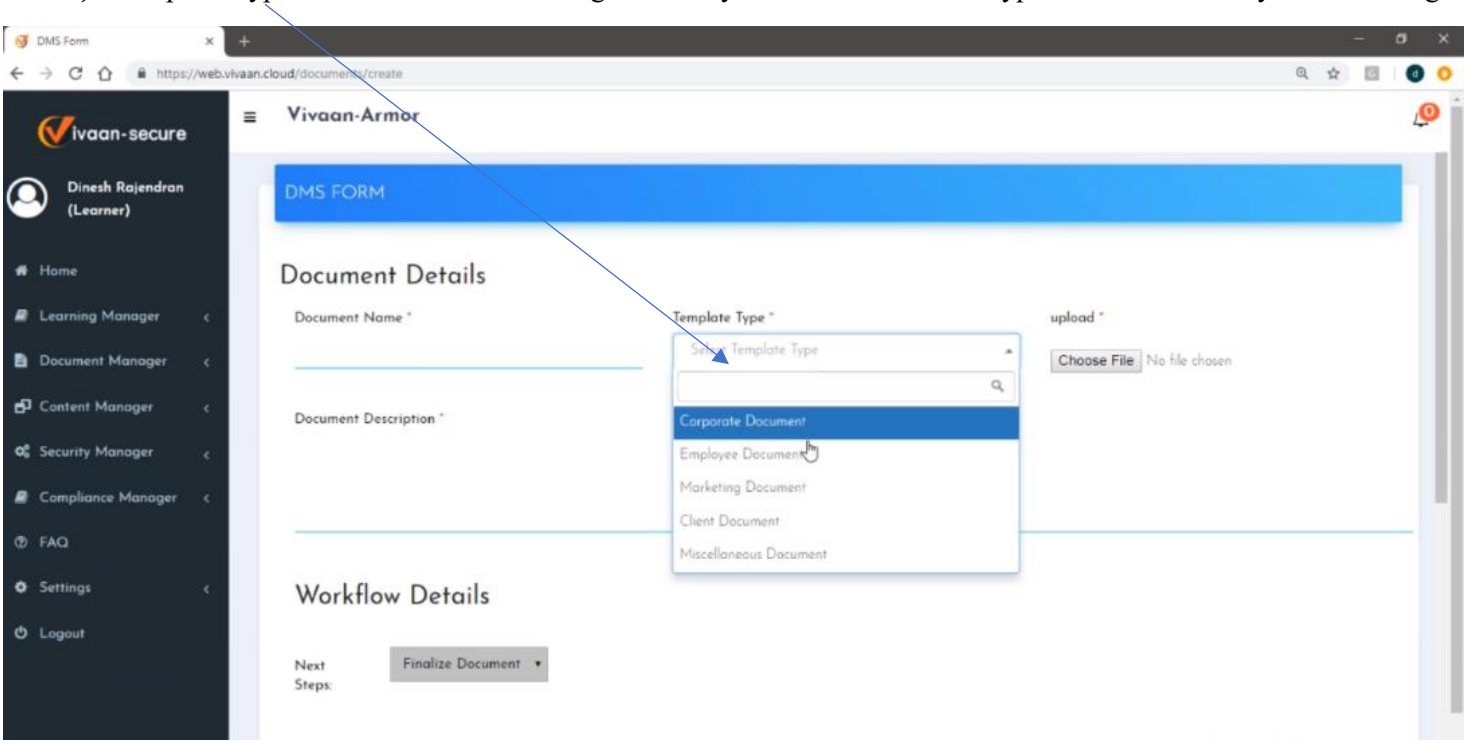
11) This form shows the details for creating a new document.
You can type a new document name or upload a document from your computer or other source.



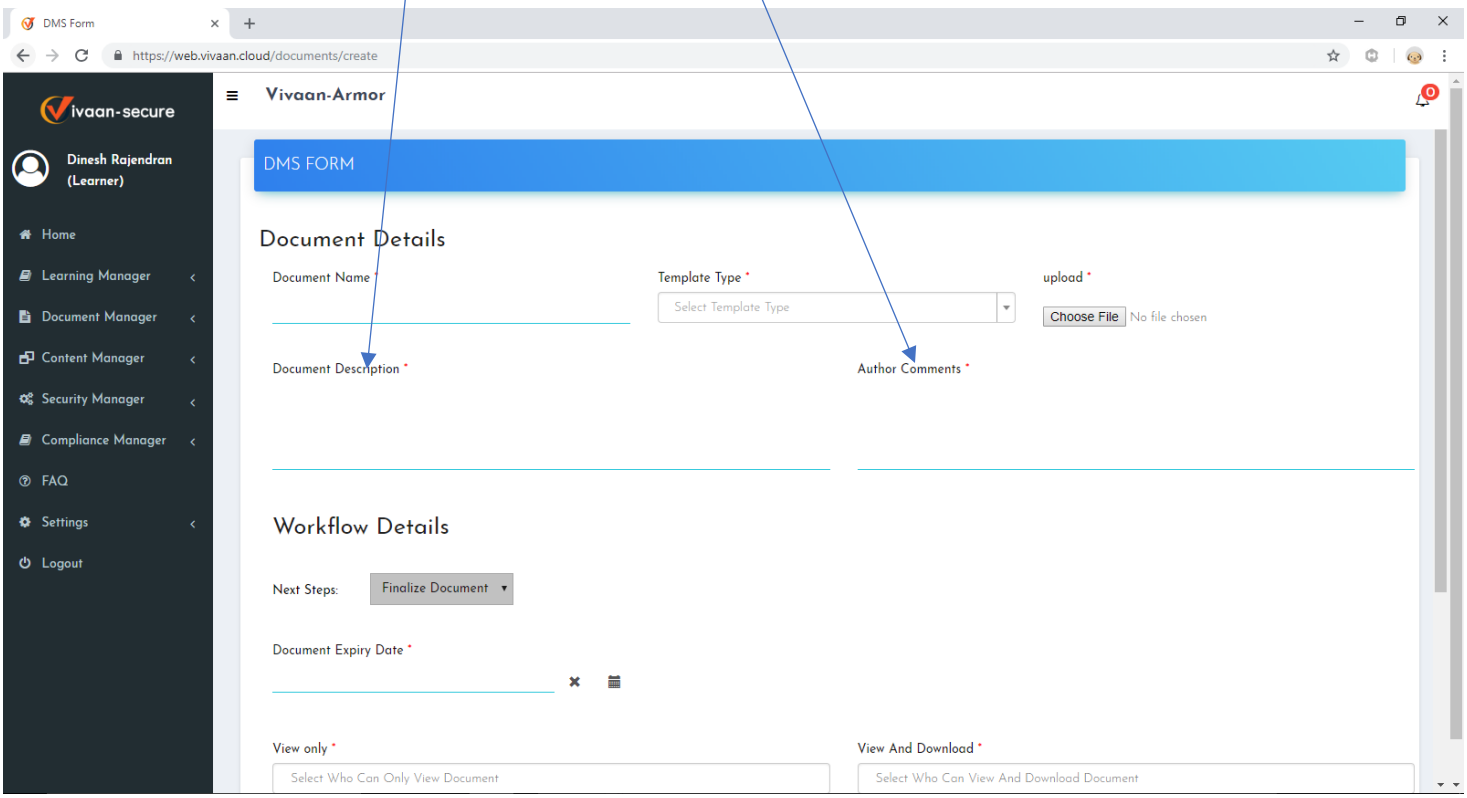
12) This screen shows a document being selected from the computer source.



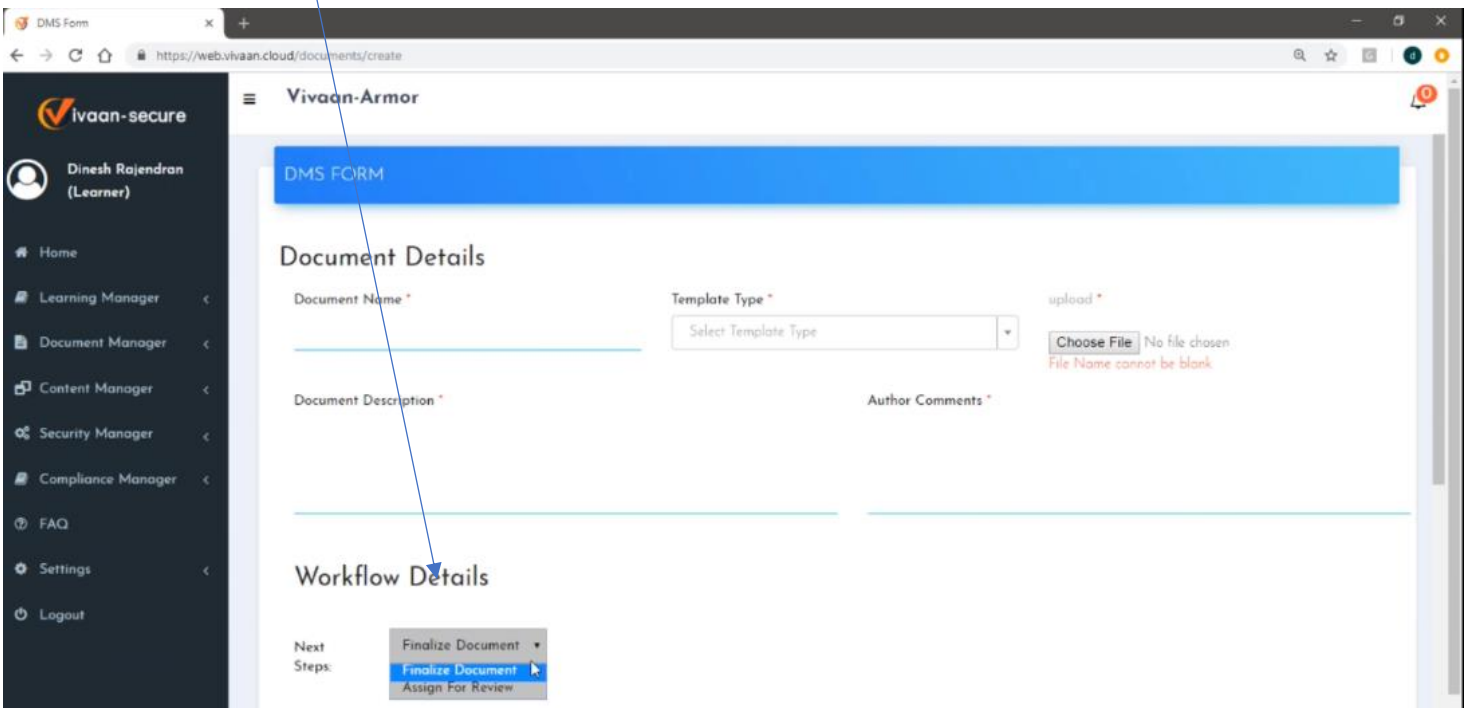
13) "Template Type" shows the different categories that you can choose for the type of document that you are making.



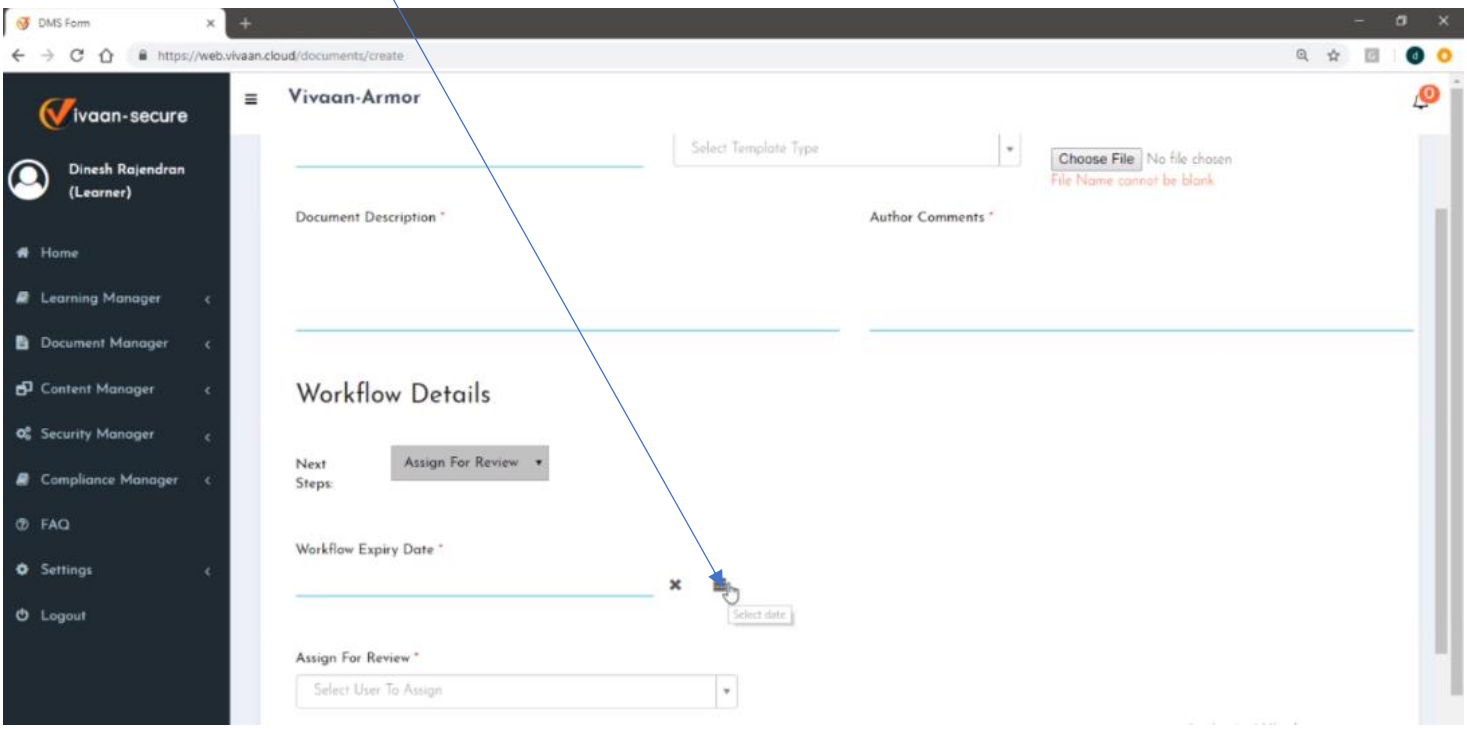
14) Remember to fill out a document description and any author comments if applicable.



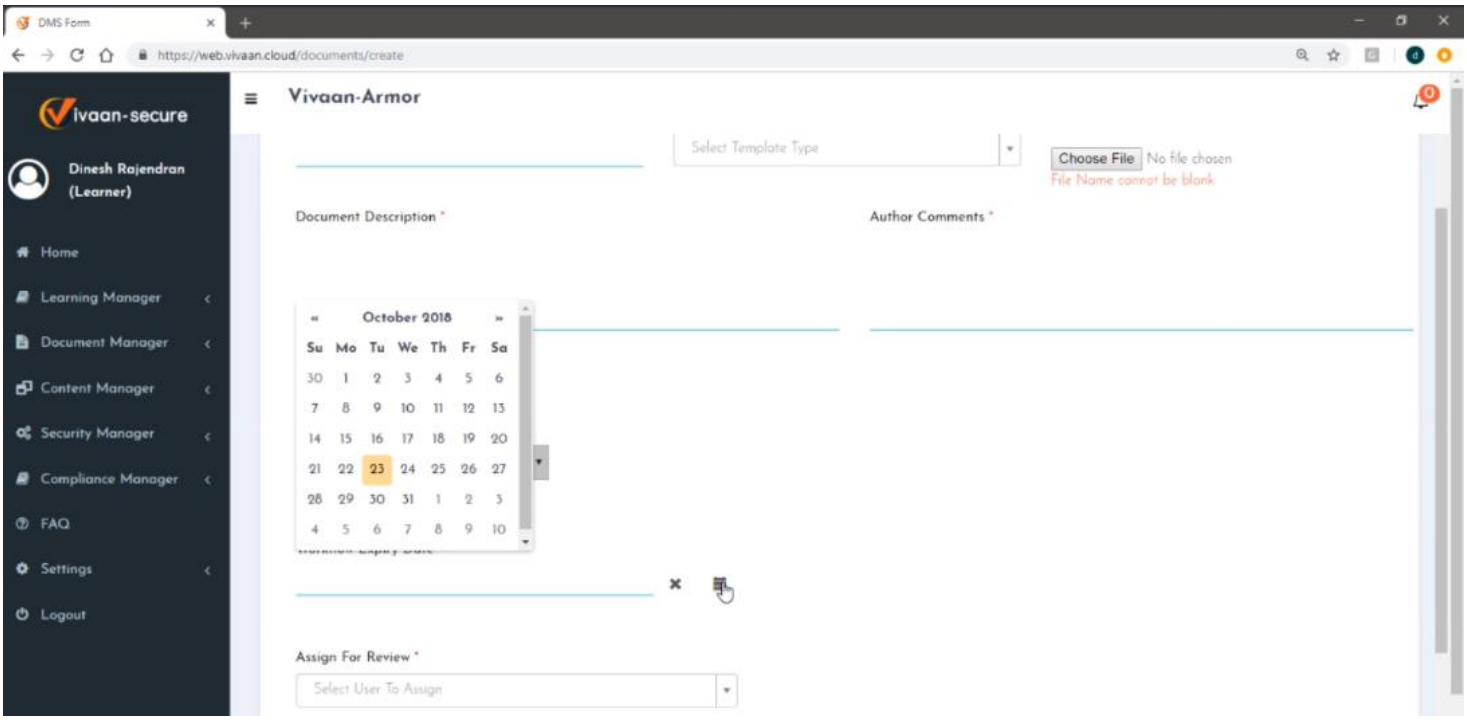
15) Once the document has been created the author can choose to finalize the document or assign for review. Assign a review means that it is assigned to another person to review or reject the document.



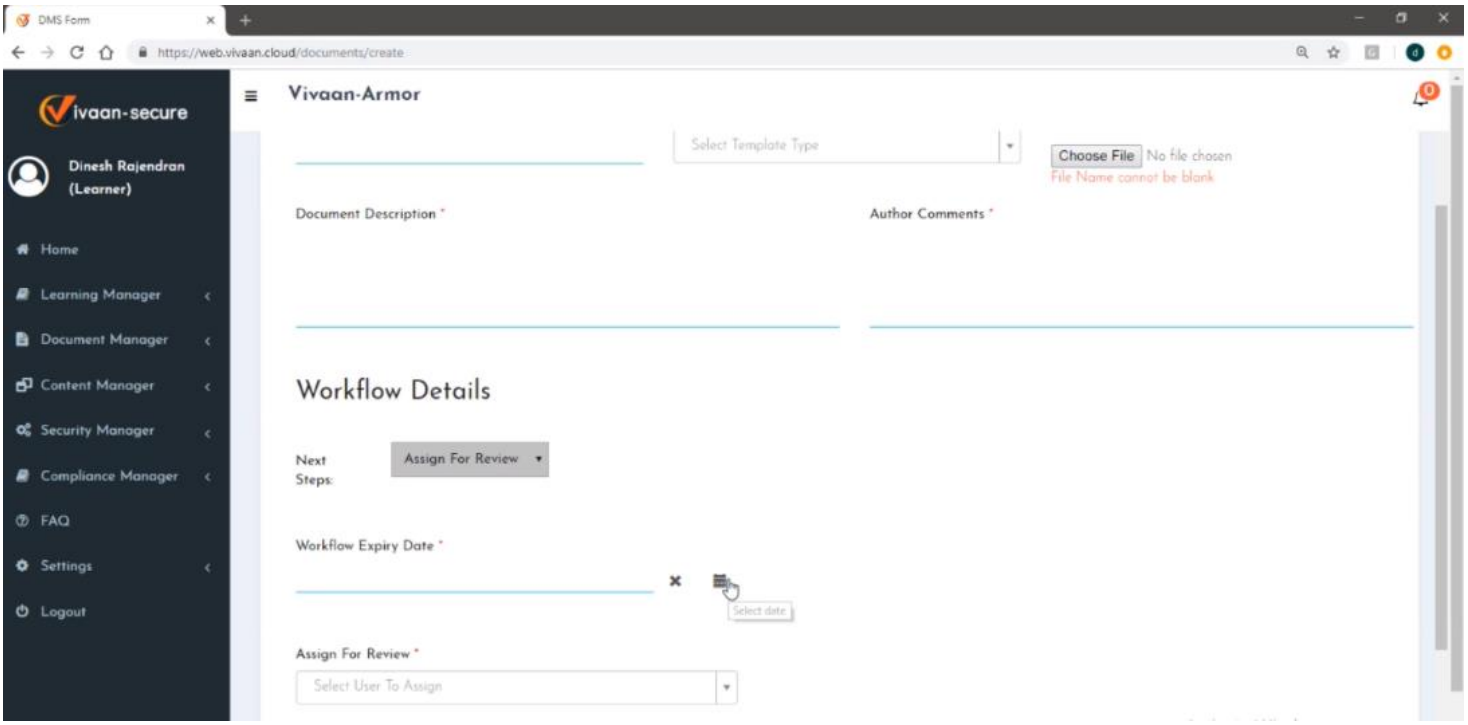
16) Choose a workflow expiry date.



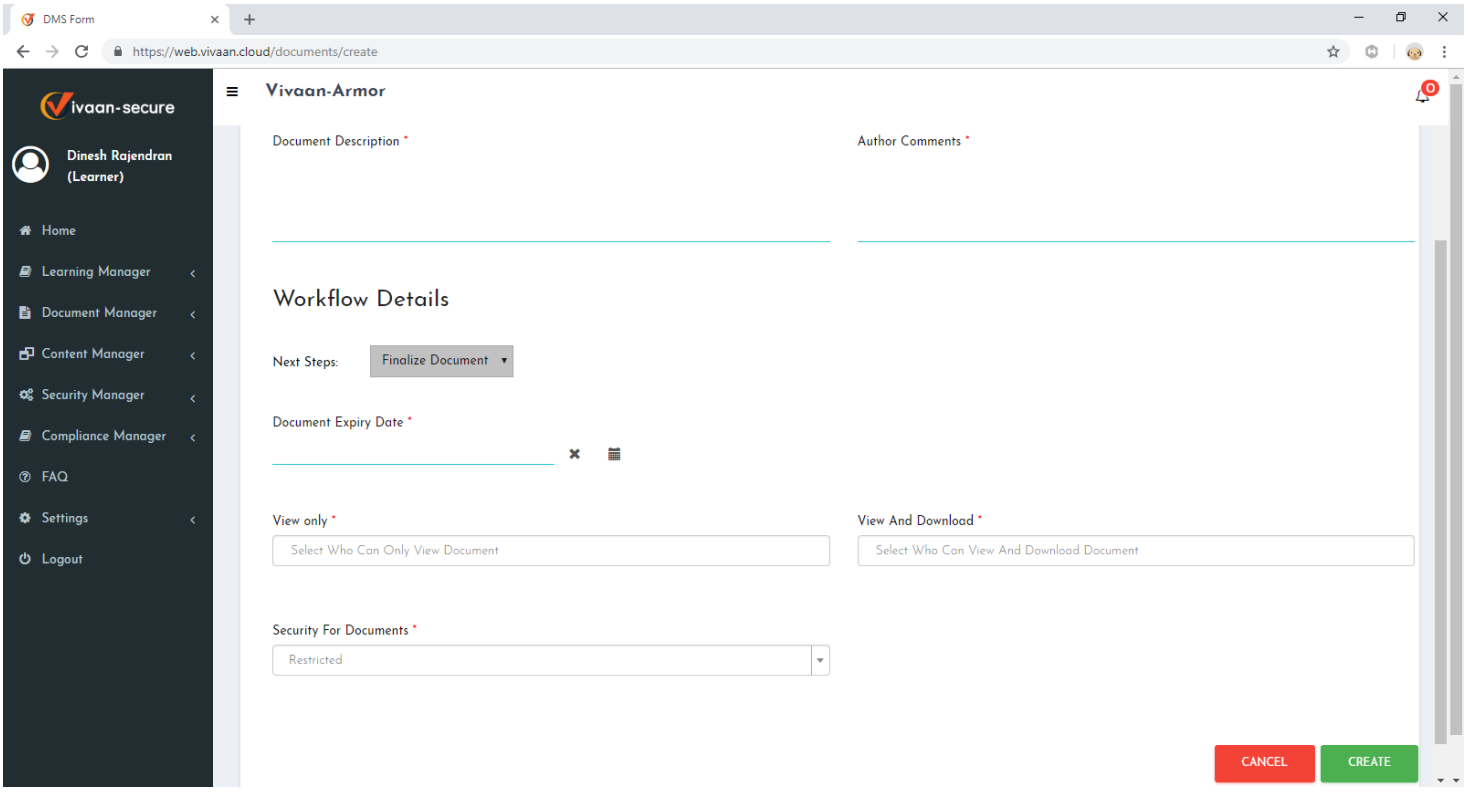
17) All digital documents will have expiry dates to make sure that redundant and sensitive data is not lost. There are two types of expiry dates. There is an expiry date for reviewing and after finalizing, expiry date will also be there.



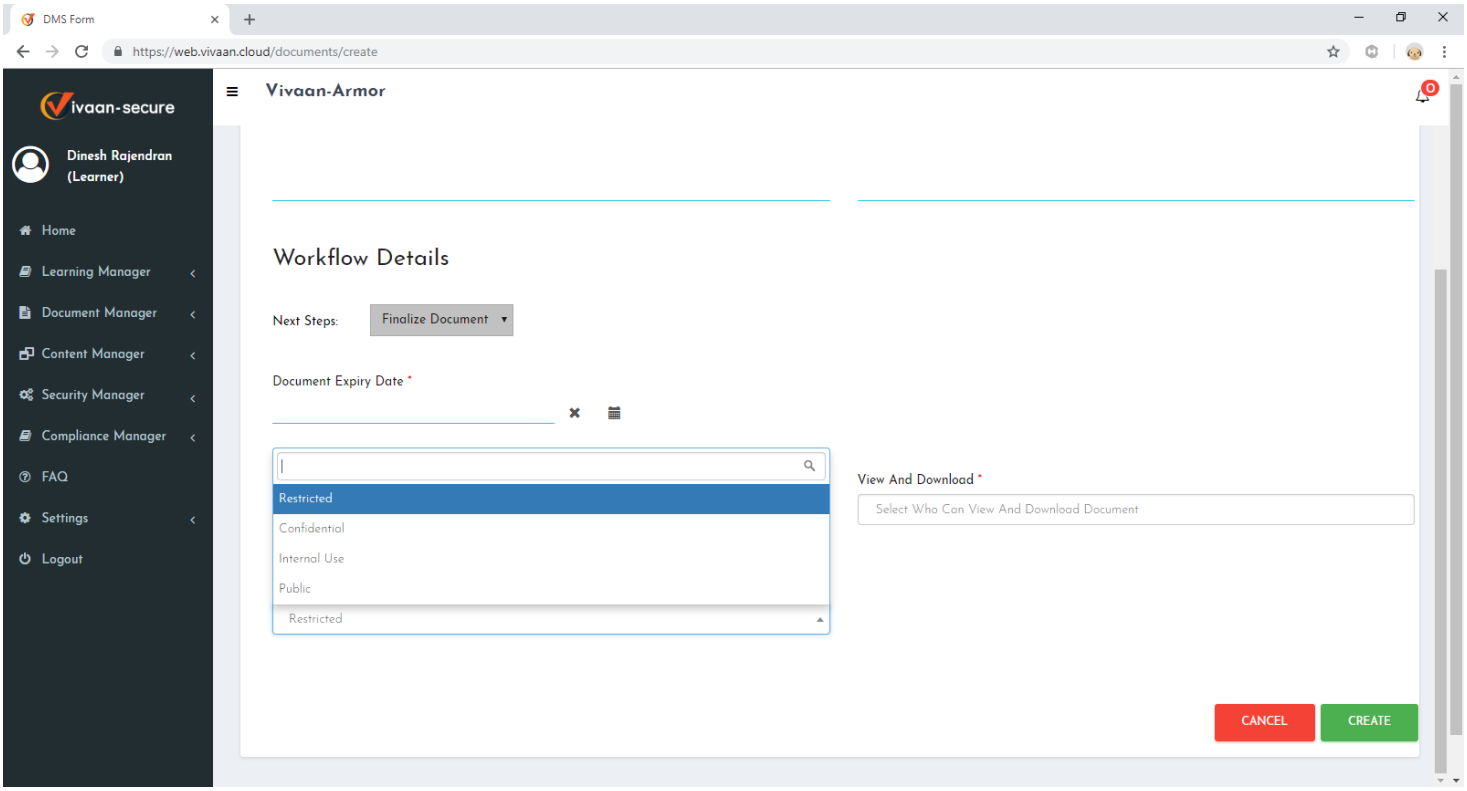
18) Choose a person to assign for review.



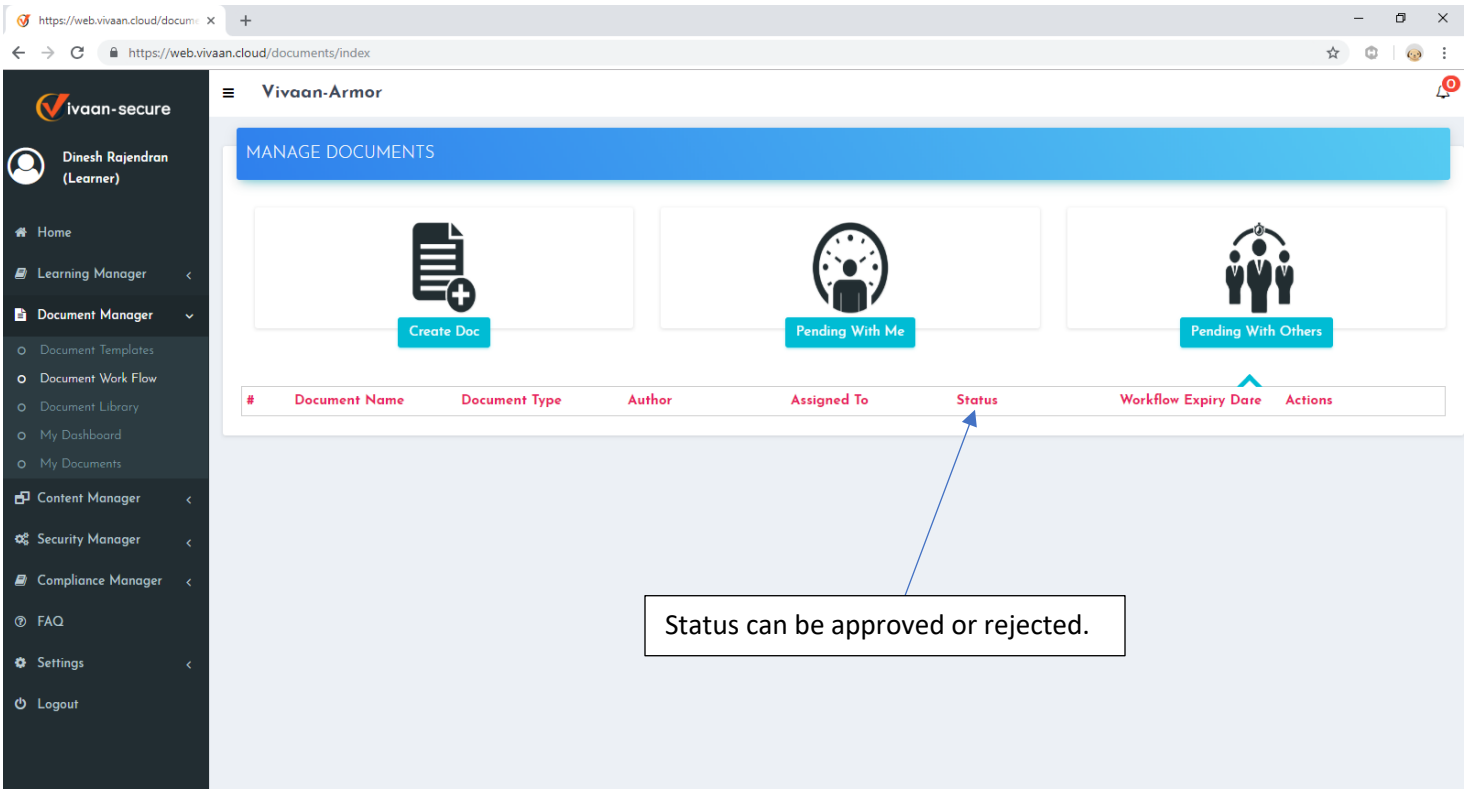
19) Assign access clearance for others to access your document for “View Only” and “View and Download”. Document flow and approvals are tracked along with allowing users access to data only on a need basis (“view only” and “view and download”).



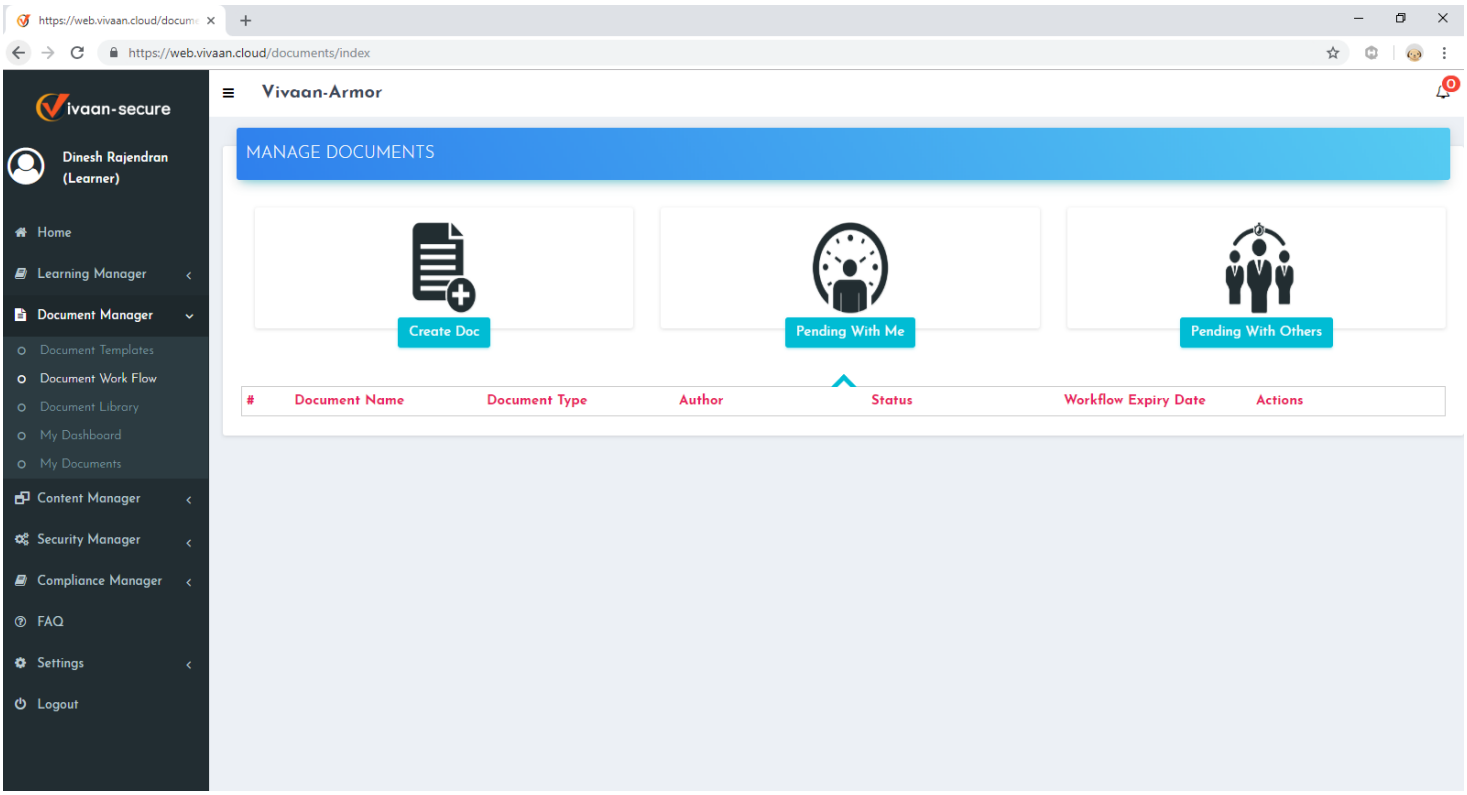
20) Vivaan-Armor allows you to manage data effectively. Data stored on the portal is categorized as Restricted (Extremely sensitive), Confidential, Internal-use and Public-use (low sensitivity). Choose the appropriate category for the document that you are creating.



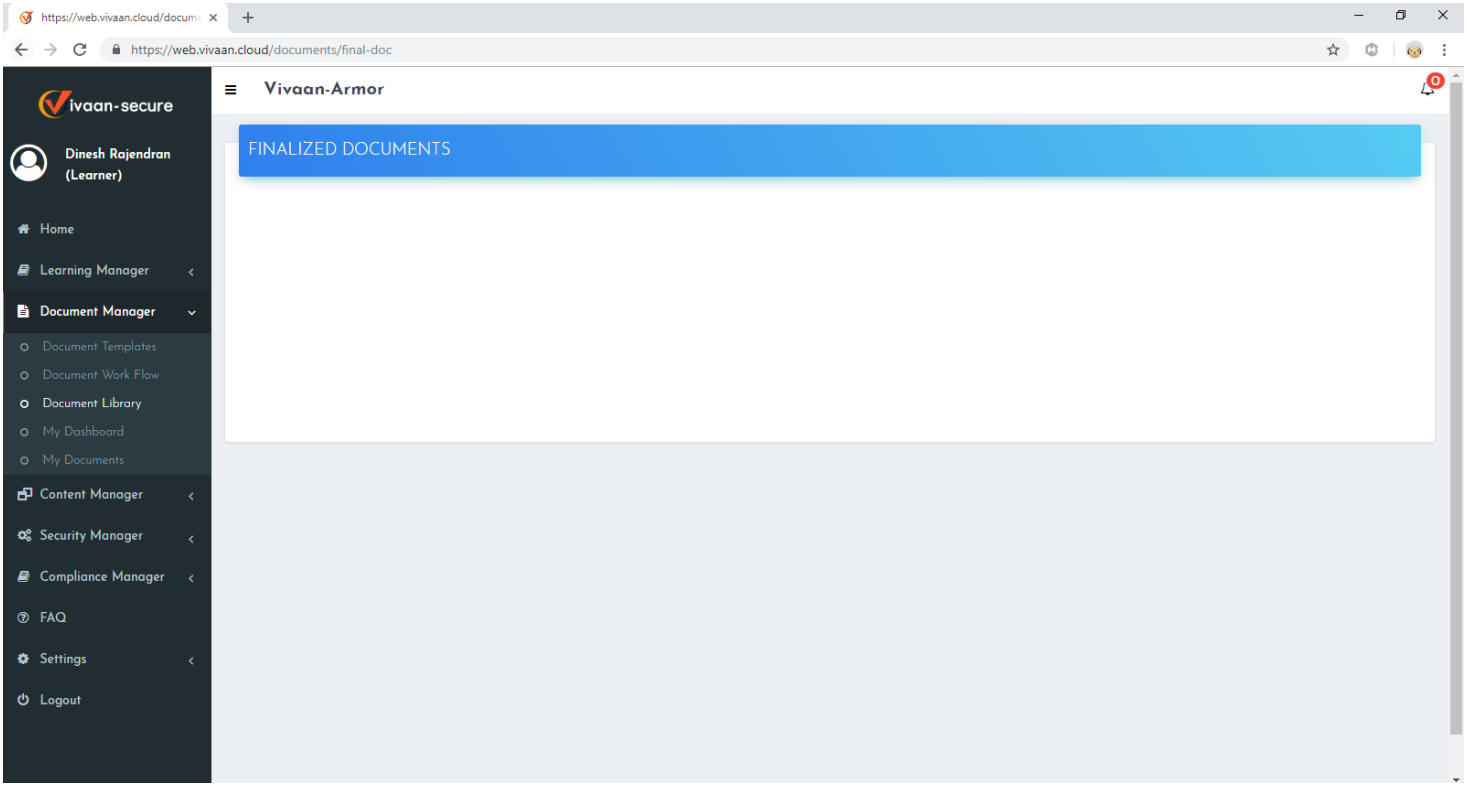
21) Documents can be "Pending with Me" (waiting for you to approve) or "Pending with Others" (documents waiting on others to approve). The appropriate documents will populate below depending on if you have pending approval documents or not.



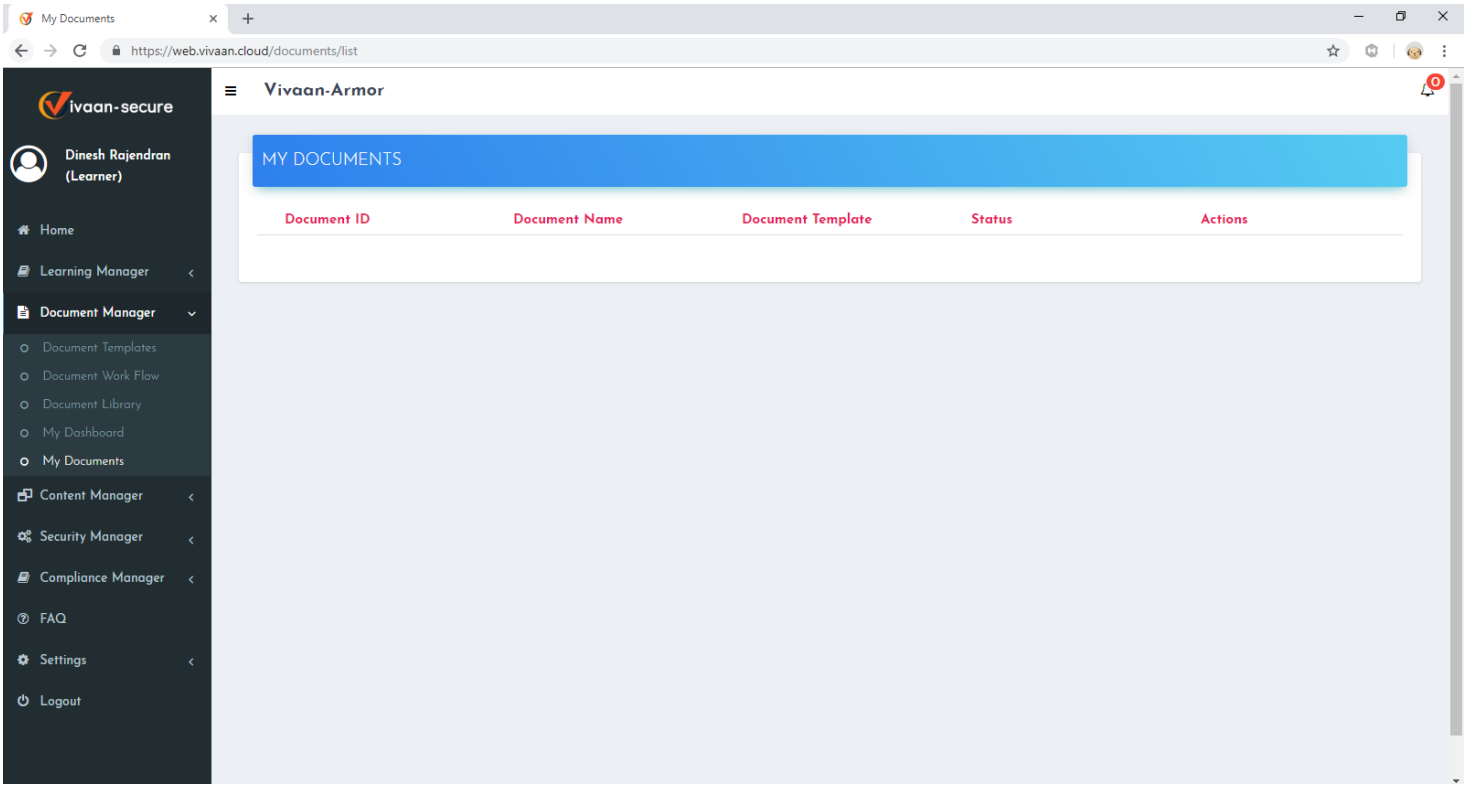
22) In here when the documents populate, you can click to finalize the document. Once you click on finalize the document, the pop up will come up as either view or view and download, depending on the clearance that was assigned to the user.



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

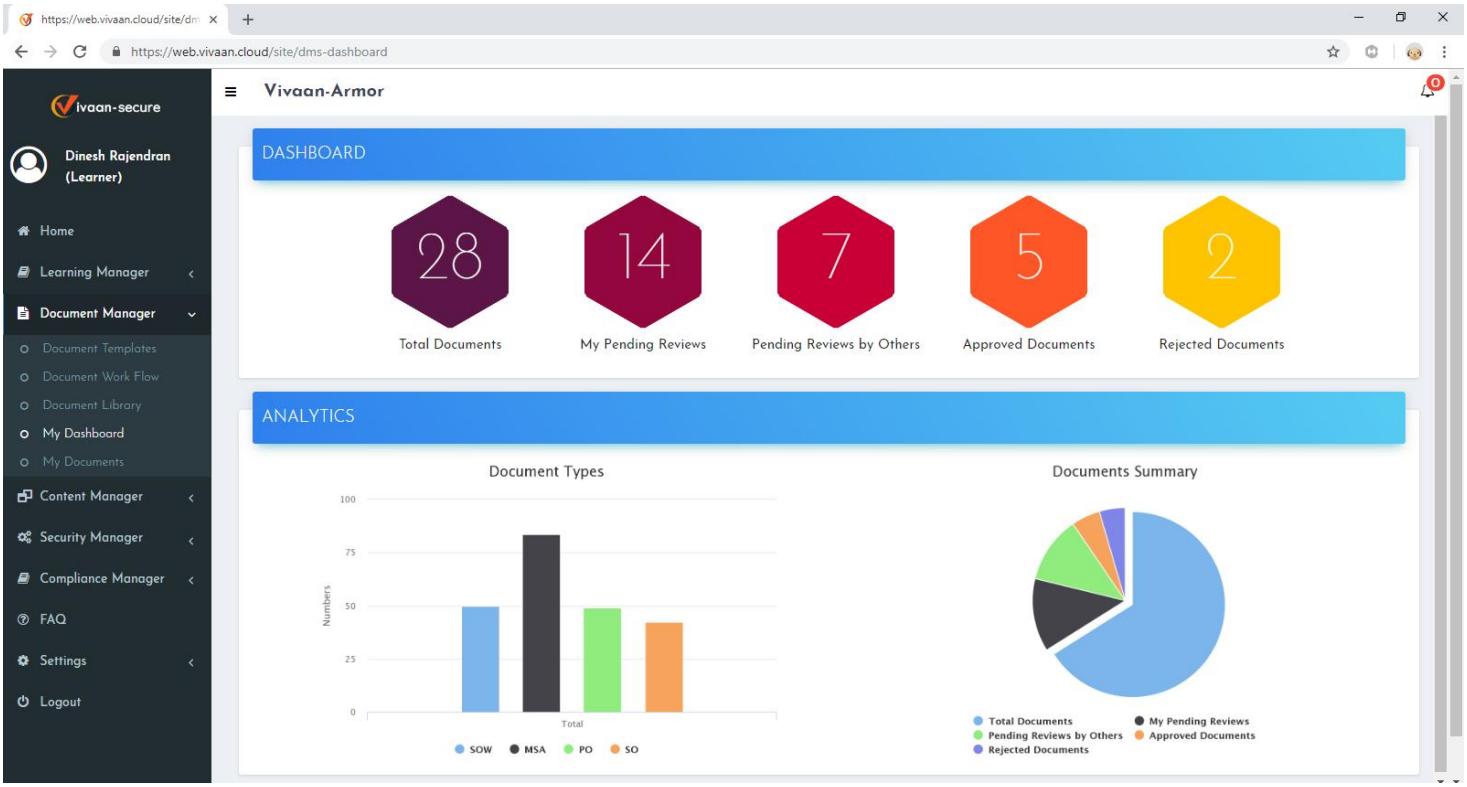
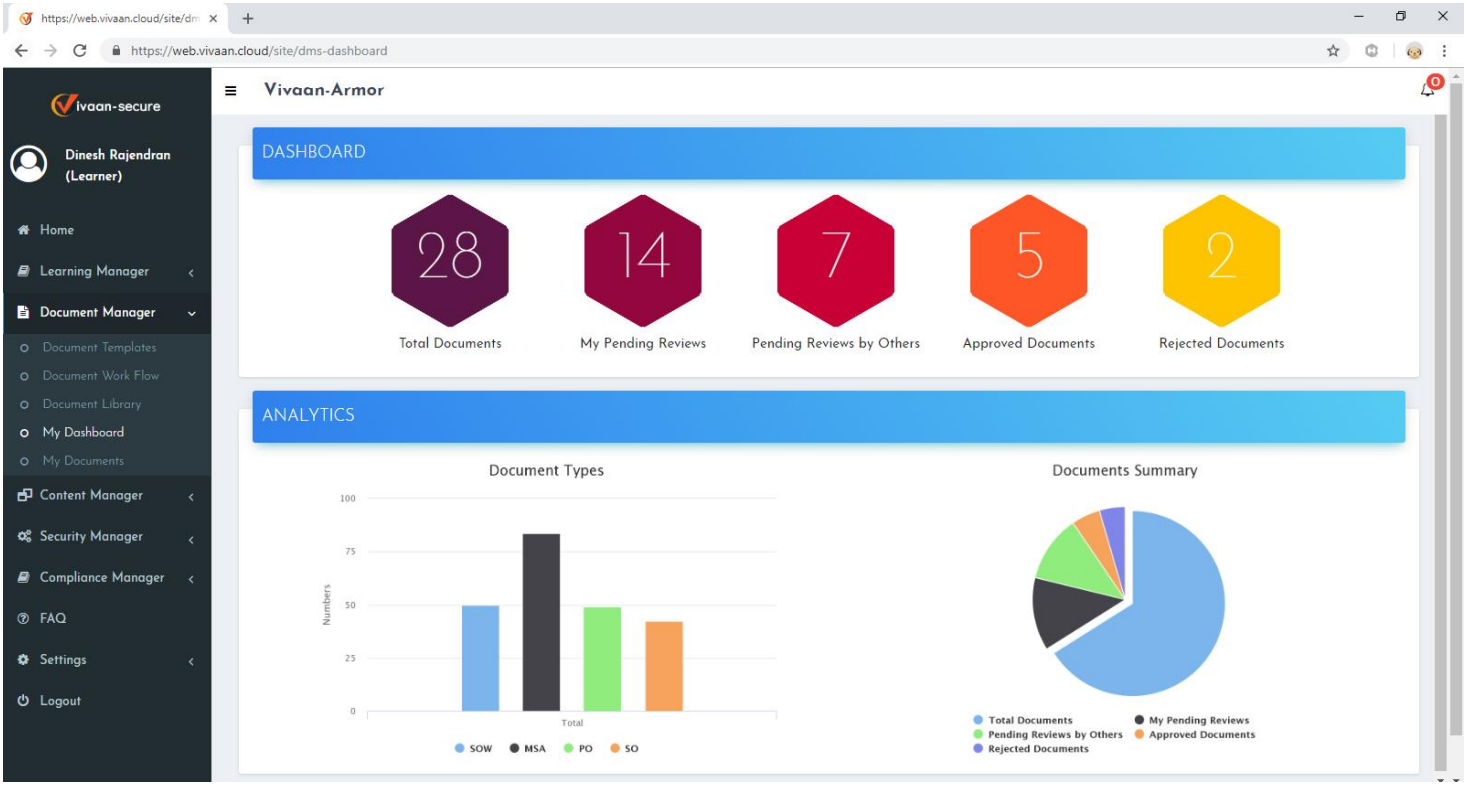


24) The document in which the user 1 has created. The user can download their documents for their personal use.



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.