2018

Company Cloud (C2) Record Room (R2)

STNADARD OPERTIONAL MANUAL VERSION-1

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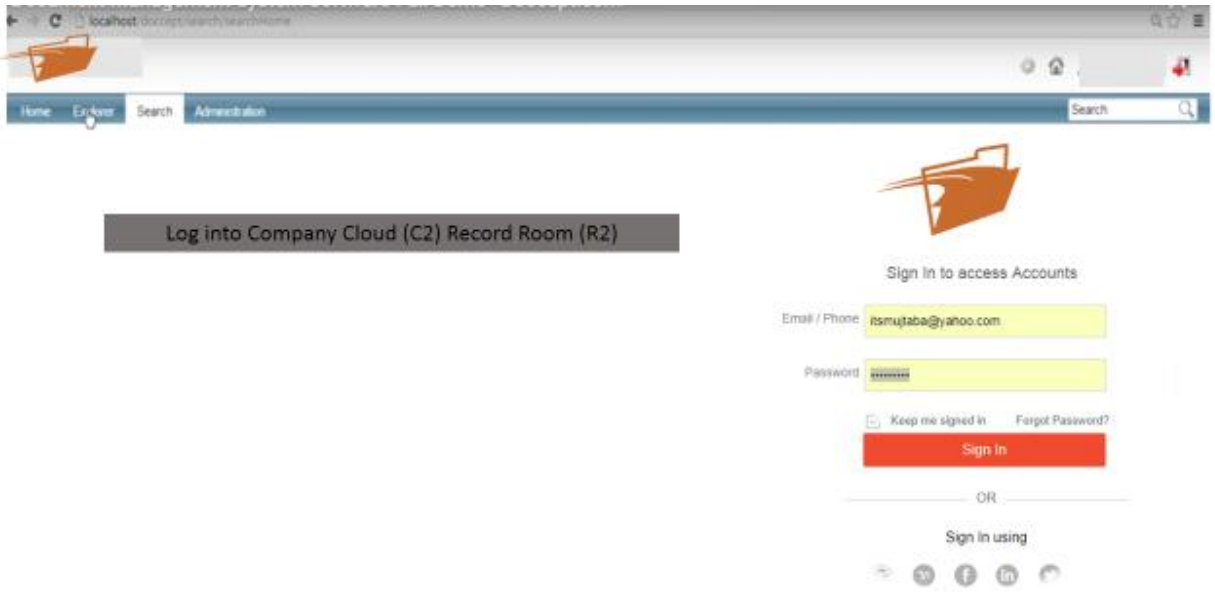
FILESOFFLOAD | Lahore

Contents

Version -1

1. This portal will be directed through www.filesoffload.com website company portal. Once customer would be in his login that interface is termed as Company Cloud Record Room or C2R2



2. Each C2R2 supports three types of users
    I. Admin
    II. Attendant
    III. User

    Admin & Attendant can be merged but not recommended to keep controls high and strict.

3. C2R2 portal will perform followings tasks (modulars)
    I. Departments & Users management
    II. Record Room management (as explained below in document)
    III. Active Sessions management
    IV. Search
    V. Logs
    VI. Purging & Retention
    VII. Notification & Alerts (as explained below in document)
    VIII. Policies & Delegations
    IX. Preferences
    X. Filing module
        i. File level
            a) Creating file (meta data capturing)
            b) Indexing files
            c) Sorting files
            d) Session management
                i. Placed-in & Closed
                ii. Took-out & Opened

iii. Took-out & Idle

e) Shared–in
f) Shared-Out
g) Version control and management

ii. Page level
   a) Scanning pages
   b) Indexing pages
   c) Uploading
      i. Inserting
      ii. Appending
   d) Sorting
   e) Deleting
   f) Shared–in
   g) Shared-Out

4. First 9 modulers are with Admin/Attendant (Admin can also use the 10th module however). The 10th and last Module will be in use of Users

5. **Admin:**

I. Admin user will be available as default for each C2R2

II. Admin will have Full control with Master Key so he can give access any cabinet, any drawer and any file. Admin can create new logins and can view all files, Drawers, Cabinets and C2R2 logs.
   i. Admin can set policies, alerts and notifications
   ii. User can delete the file but cannot purge. User can purge the file (but not recommended) if Admin set the policy of purging as delegated to user.
   iii. Purge and Retention is in control of Admin. So Admin can define FIFO policy and can define space for trash. In case of FIFO trash will automatically get cleaned as per FIFO.
   iv. Admin can define notifications for users if trash is reaching its limits.
   v. Admin can define admin alerts also for himself if trash reaches to a limit
   vi. Admin can restrict in policy for number of cabinets under a department
   vii. Admin can set limit for number of files inside a drawer
   viii. Admin can set storage (C2R2) space for a department
   ix. Admin can also set storage space of a drawer too (but not recommended)
   x. Admin can set the limit of number of duplicate keys for a cabinet
   xi. Admin can set number of drawers inside a cabinet (default is 5 drawers)

6. **Attendant:**

I. It's a record room keeper/ Attendant who has the rights to place new cabinets (with or without approval of admin), remove cabinets (with or without approval of Admin), assign key of an empty cabinet to a user (with or without approval of admin), view the stats of empty cabinets, view the logs of visitors (till the cabinets excluding files logs), volume/storage stats. However Attendant cannot
   i. Create a new login/user
   ii. Create a new department
   iii. Assign a duplicate key to a second user of an occupied cabinet

iv. Confiscate a key from a user
v. Bar a user to visit
vi. Assign rights to a user

7. <u>Admin/Attendant:</u>

I. Company has a right to merge the both users i.e. Attendant and Admin. Moreover, Admin can delegate those tasks to Attendant permanently where Admin approval is required. If this option is selected then these tasks need Admin approval would be performed by Attendant without approval.

II. Admin by default has all rights (in other words the master key) and he can enter into any cabinet, any drawer and any file.

III. Admin may or may not create a login for Record Room attendant or **"Attendant"**

IV. Admin cannot add a file in any cabinet but can install a cabinet and drawer in a department

V. Each admin can create multiple departmental logins. One user can establish only one session at a time (This is security check).

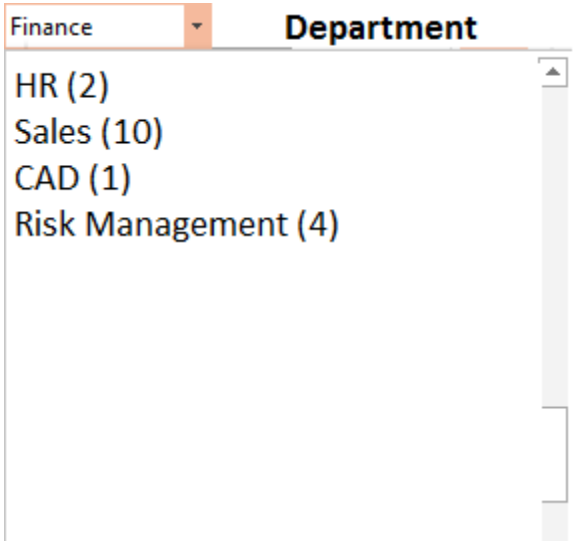
VI. Department will automatically be created with the creation of a User, Admin/Attendant can place multiple cabinets inside the Two accounts will be mandatory for each company's C2R2 one admin and one departmental

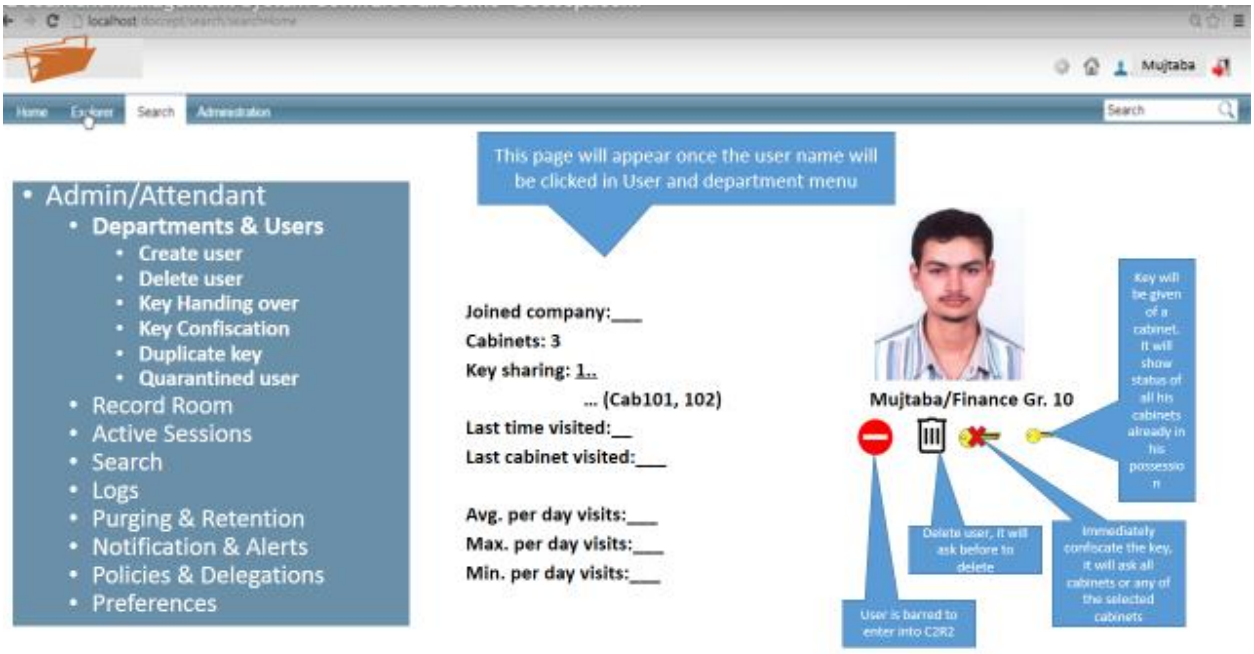
VII. If User being created is the first one in department then his department will also be created along with the user. If department already exists then user will be added as duplicate key holder in a department.

VIII. The same department will appear in drop down list if another user is being created.

IX. Department will not be created separately but along with the creation of user there will be an option to create a new department.

X. If there will be no user the department will automatically abolish. The dropdown list for creating or selecting a department will appear like below on the widget of new user. The new user collected details will be ***User Name***, ***Employee ID***, ***Designation***, ***Joining Date***, ***Department***

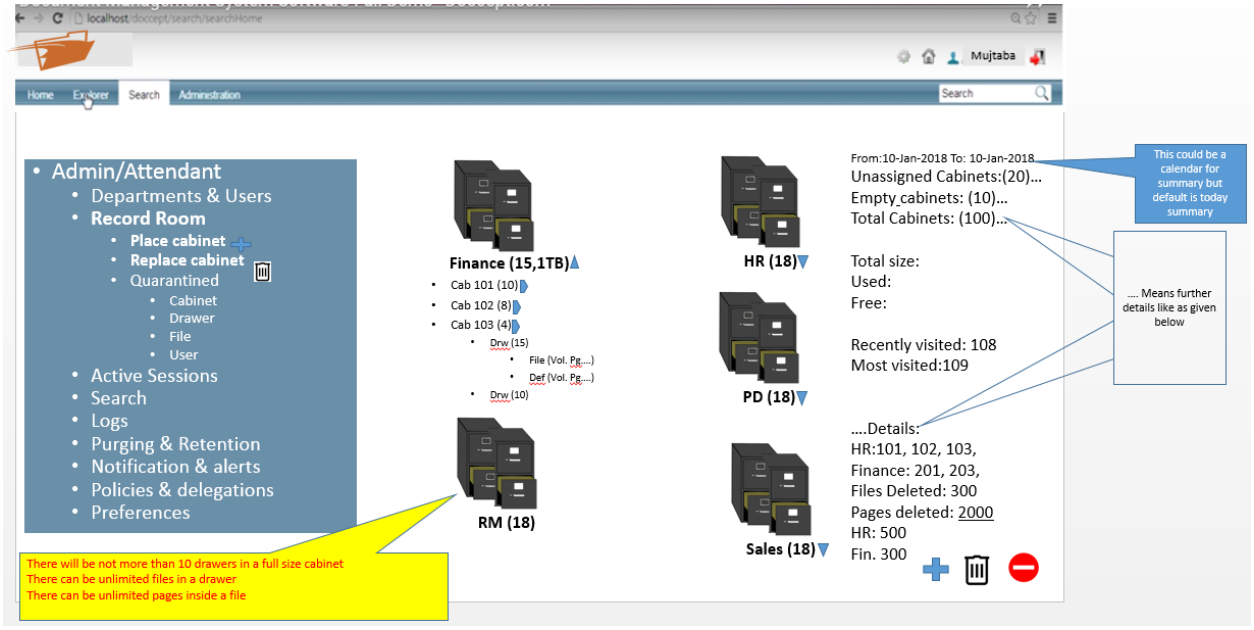




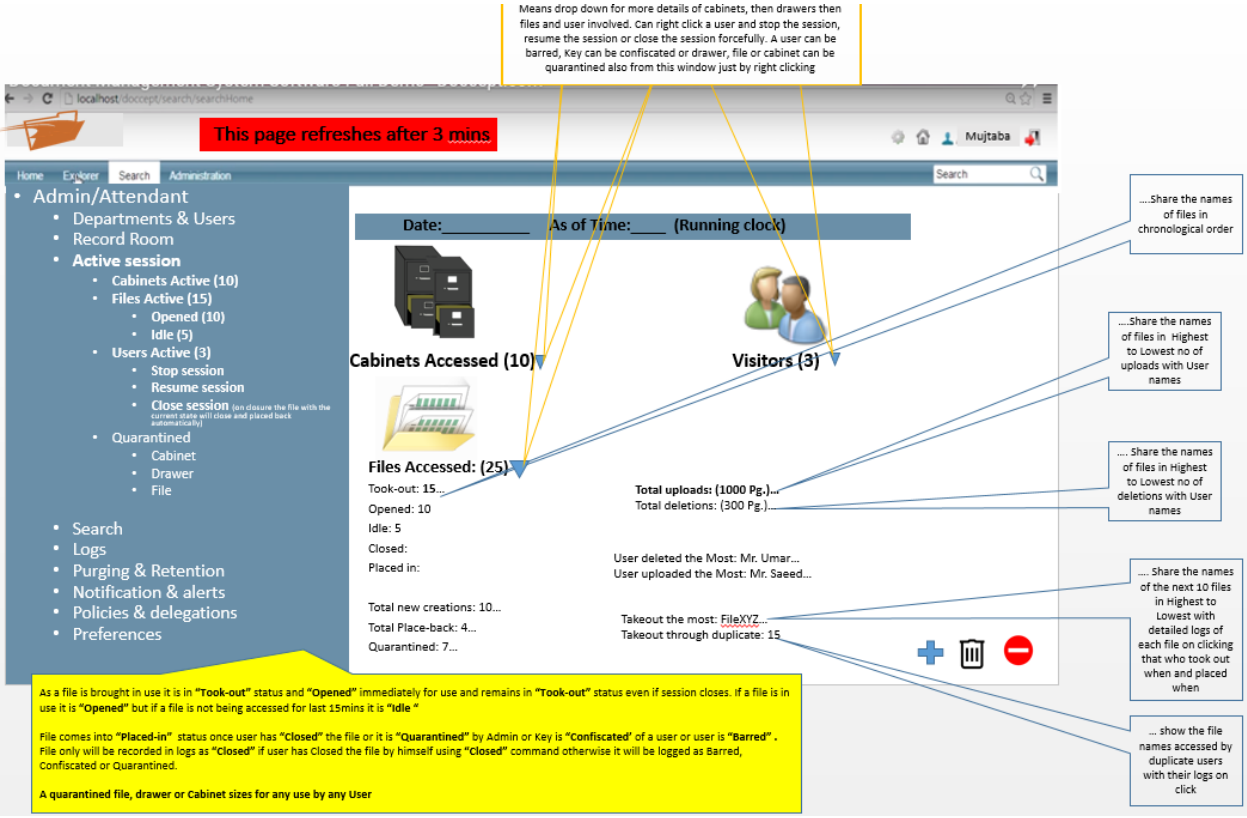
XI. Admin has the File confiscation powers same as keys Confiscation powers and baring users powers. Department's creation and allied user creation

XII. Admin/Attendant will have the rights to place cabinets but he doesn't has the key of any cabinet. However he can view the volume of each cabinet in terms of number of files residing under a specific cabinets or storage space occupied by a given cabinet or storage space occupied by a given drawer. So any abnormality can be reported.

XIII. Admin/Attendant can see that how many times a person came into store room and which cabinet he/she visited



XIV. Admin Active Session module will empower Admin as below;



i. Showing status to admin of each user inside record room or C2R2
ii. Closing a session forcefully to remove a user from C2R2, dropping session and withdrawing rights – emergency control check.
iii. User session management tasks by admin

XV. Preferences

i. Company logo upload and placement like left, right or center on header of the C2R2
ii. Company address and other information in footer of C2R2.
iii. Company color theme adjustment in C2R2

XVI. Notifications

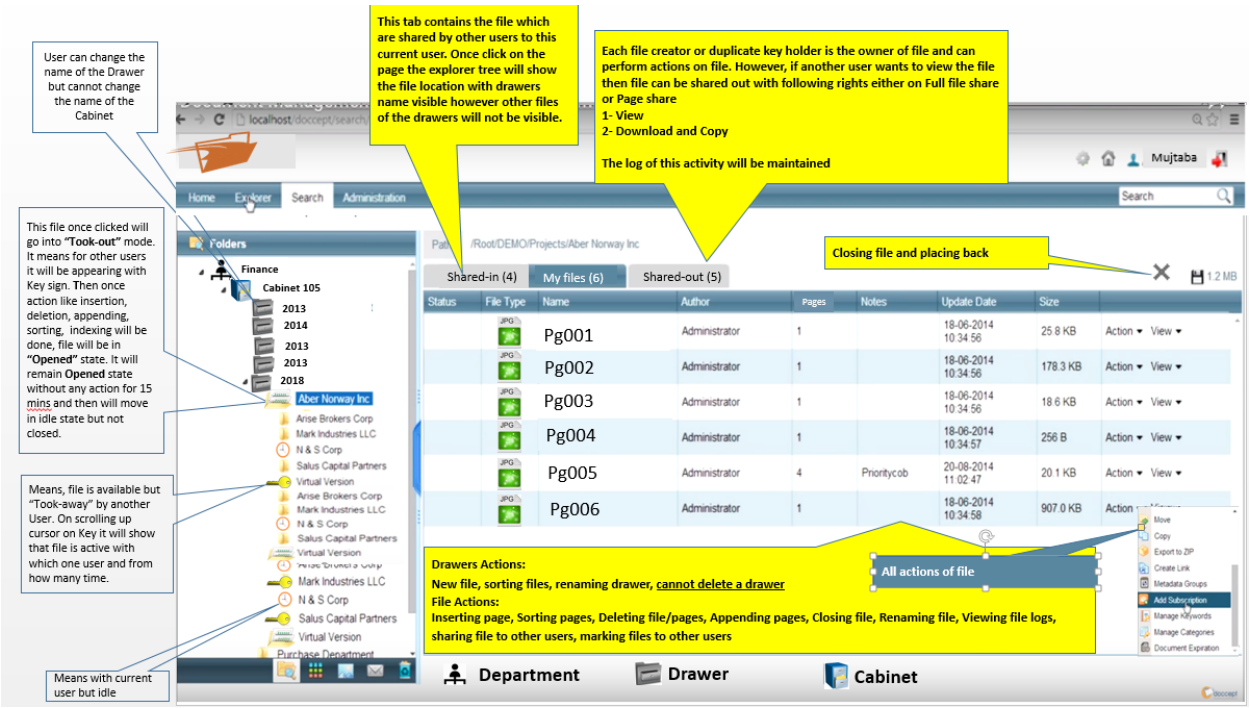
i. Locking store room (C2R2) as and when required or in holidays (by admin user)
ii. Setting times for C2R2 and setting schedule for each department to upload files

XVII. Policies & Delegations

i. Rights assignment to department user
ii. Setting general policies of C2R2
iii. Delegations of approval required tasks to attendant
iv. Deleting rights of a file would only be assigned on permission
v. If a page is deleted from a file, alert box of admin should have an alert
vi. Version should be controlled in case of deletion and it should be viewable to admin only Recovery of deletion will be done by admin only on request of a departmental user from deletion or purging file control

8. <u>User:</u>

I. If User being created is the first one in department then his department will also be created along with the user. If department already exists then user will be added as duplicate key holder in a department.
II. The same department will appear in drop down list if another user is being created.
III. Department will not be created separately but along with the creation of user there will be an option to create a new department.
IV. Inserting or appending pages in a recorded file (and previous version control and viewing option of all appending and insertions accordingly for admin only for all departments)
V. Insertion of new pages could be like below;
    i. Appending newly scanned pages in a file like if a file has 10 images as pages and 2 more are scanned those would append as page 11 and 12
    ii. Inserting randomly, such as file has 12 pages/images and then another page is scanned it will become the part of file anywhere in the sequence as inserted by departmental user.
VI. Viewing, on a given path uploading files or pages (this will be through desktop application receiving files from scanner, sorting, indexing and uploading on a given path)
VII. Entering meta-data of a file and cabinet/drawer
VIII. Viewing logs of a drawer, cabinet, file or page.
IX. Searching a file using meta-data
X. Opening up file using C2R2 viewer
XI. Downloading file (will be with special permission and logs of download will be maintained and alert will be sent to Admin)
XII. There will also be page sorter which will allow the departmental user to sort out the pages as per desired sequence.
XIII. The normal user has all rights related to file creation, deletion, page deletion, page insertion, page appending, page sorting.
XIV. File would have three status;
    i. Placed-in & closed
    ii. Took-out & Open
    iii. Took-out & Idle



XV. Before to work on a file User has to click the "Placed-In" file into a "Took-out" file and after completion user will "Close" the file which will convert the status back to "Placed-In". Till the File is in Take status with a user it will not be available for any other user. However, admin has the File confiscation powers same as keys Confiscation powers and baring users powers. If a file in use of a user the other user cannot perform any file related function even if he/she has Keys of the cabinet. Logs of each file will be maintained and will be in custody of Admin only. User can delete the file but cannot purge until powers of purging are delegated to user by the Admin.

XVI. Each file creator or duplicate key holder is the owner of file and can perform actions on file. However, if another user wants to view the file then file can be **Shared-out** with following rights either on Full file share or Page share

i. View
ii. Download and Copy

XVII. The log of this activity will be maintained

XVIII. **Shared-in** tab contains the file which are shared by other users to this current user. Once click on the page the explorer tree will show the file location with drawers name visible however other files of the drawers will not be visible.