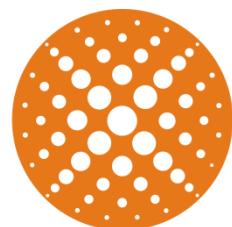


OMNIDOCS 9.1

REFERENCE MANUAL



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INDIA

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1 Introduction

OmniDocs is an Enterprise Document Management platform for Creating, Capturing, Managing, Delivering and Archiving large volume of documents. OmniDocs provides highly scalable, unified repository for securely Storing and Managing the documents in an enterprise. It provides access to enterprise documents directly and through integration with business applications.

It provides a centralized repository for the enterprise documents and supports rights-based archival. It manages complete lifecycle of documents through Record Retention, Storage and Retrieval policies. It also supports exhaustive document and folder searches based on date, indexes and general parameters as well as Full Text Search (FTS) on image and electronic documents.

The basic operation of the system is accessing the documents from the remote site and working on them, without archival and retrieval hassles. In an Enterprise Wide scenario, the Document Management System can be centralized with the robust and efficient "OmniDocs". Further, this DMS can be accessed from any part of the world through OmniDocs Web.

Important features of OmniDocs are:

- Cabinet for sharing the documents among users anywhere in the world.
- Viewing the folder structure of the cabinet in the form of a tree view.
- Viewing the folder contents in details view.
- Moving/ Copying the document/ folder to another folder of the same cabinet.
- Creating shortcuts of documents under selected folders.
- Adding/Deleting/Downloading documents to/from a folder in the cabinet.
- User can post document to the inbox of any other user in the Cabinet.
- Documents can be sent as mail Attachments to anybody.
- Image Documents can be viewed using the IVApplet and OpAll Viewer, which also support Document annotation, Printing the current page, and Defining Sharing over Annotations.

Introduction

- Defining a Search criterion and obtaining a folder/document list on its basis.
- Viewing any filed document in Document Viewer.
- Showing the document properties in Document Viewer.
- Ability to Associate/Disassociate Data Class, Global Indexes with Documents, Add keywords, Comments to Documents, defines sharing over document.
- Viewing Folder Properties, change owner ship of folder, associate-disassociate Data Class with folders, define sharing over folder.
- Linked Documents can be viewed.
- Annotations and Document Notes can also be viewed in the OmniDocs Web.
- Documents can be checked-in and checked-out and thus versions of the documents can be created
- Paper Profile can be created.
- Trash Management is used to manage deleted files.
- Password configuration is also possible.

System Requirement

The Minimum hardware and software requirements for **OmniDocs Web** are as follows:

Operating System	Database Server	Application Server	Browser	JRE
<ul style="list-style-type: none">• Windows 2008/2012 (64 bit) Enterprise Server• RHEL 6.0• Solaris 11 (x86)	<ul style="list-style-type: none">• MS SQL 2008/2012/2014,• Oracle 11g,• Postgre SQL 8.x• MS Azure DB	<ul style="list-style-type: none">• JBOSS EAP Alpha 6.3• JBOSS EAP 6.2• WAS 8.5,• Weblogic 12 C*• JBOSS EAP 7.0• Wildfly 9.0.1	<ul style="list-style-type: none">• IE- 11• FireFox-50 and above,• Chrome-53 and above.• Safari -10.1	JRE 1.7

2 Working with OmniDocs

OmniDocs provides an easy to use graphical user interface in Web Desktop at the front end that supports extensive Document Management and Workflow operations that include Document Acquisition, Exhaustive Document and Folder searches, Easy Document Viewing, Annotation support and Image Editing operations. It also provides Information Management, Online Form Processing, Seamless Content Management, Automatic Data Capture, Version Control, wide-ranging Document delivery features and an Adaptive Workflow for efficient document processing. OmniDocs Web Desktop enables:

Complete Information Management by enabling users to create Cabinets, Folders, and Subfolders for classification of information and hierarchical storage management of documents. Users can also modify the properties of the folders and documents.

Easy Indexing and, Retrieval of Documents and Folders by enabling users to create Data Classes and indexes of various data types and associate the DataClass with documents and folders.

Easy Document and Image Viewing with the help of browser-based Image View Applets, all standard Image Operations and facility to traverse to next page/previous page/ specific page while viewing multi-page documents.

Powerful Document and Folder Searches to locate the documents and folders through search of user defined indexes and performing Full Text Search.

This chapter includes the details on the Toolbar options and other features available on the OmniDocs Web.

2.1 Starting OmniDocs Web

To Launch OmniDocs Web follow the following steps

1. In the Address bar of browser, enter the appropriate URL in the format:

http://<Address of Application Server>:<Port Number>/omnidocs/login.jsp

2. Click **Go**.

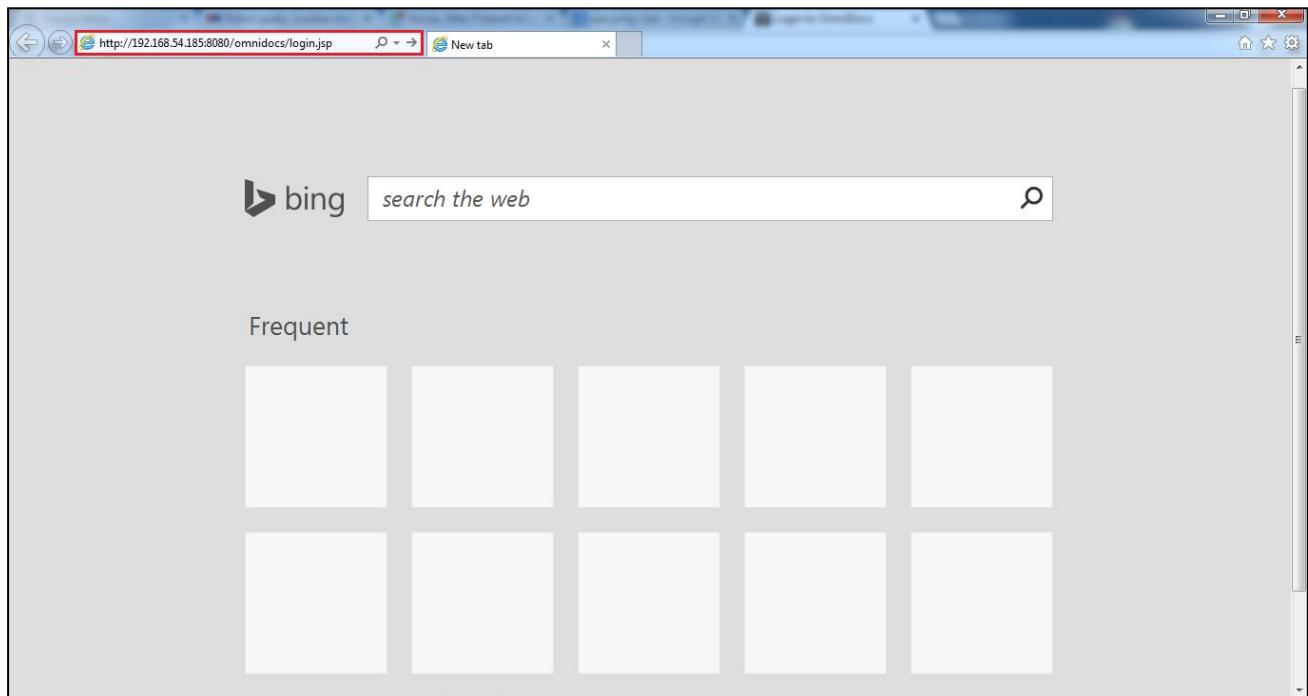


Figure: 2.1

3. The Login screen of the OmniDocs Web appears. Enter the **User Name** and **Password** in the Login Screen.

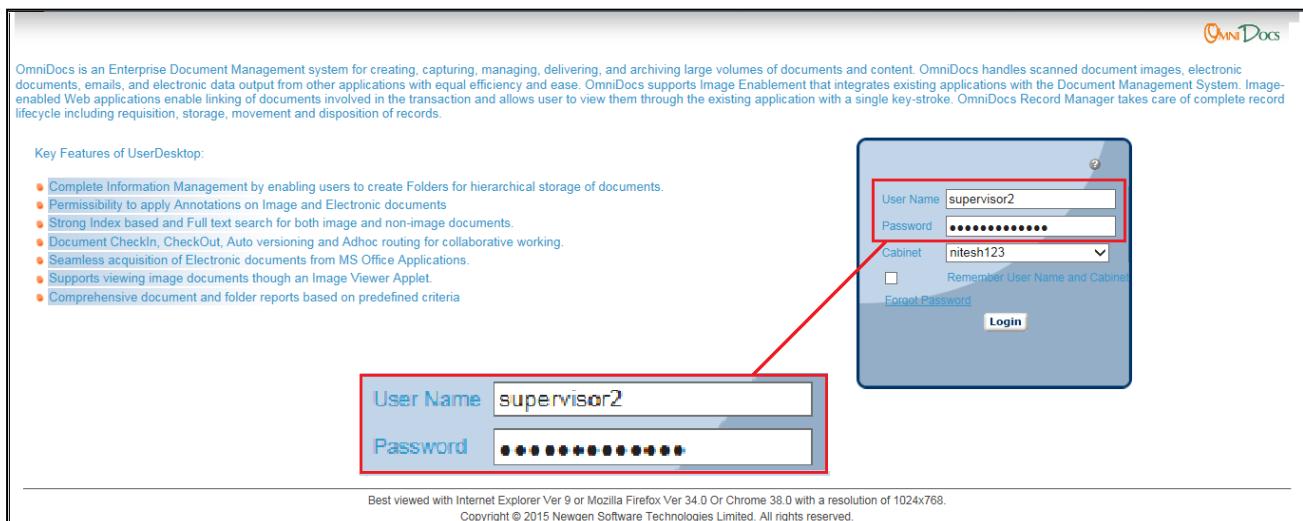


Figure: 2.2

4. Select the shared cabinet that you need to access from the drop down list in the Cabinet box.

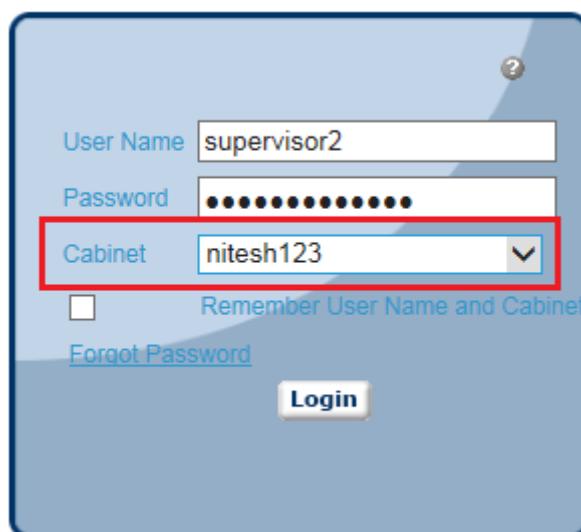


Figure: 2.3

5. Select the option; **Remember my User Name and Cabinet** to log on directly to the shared cabinet later. Click the **Login** command button to proceed.

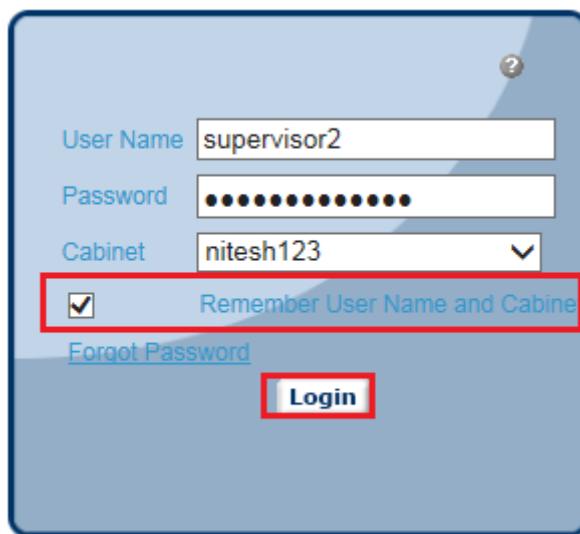


Figure: 2.4

NOTE:

Once the **Remember User Name and Cabinet** is selected, the Login dialog box when invoked next time has the username pre-filled in the **User Name** section.

6. A message box appears if the user with the same Username as entered in the Username text box is already logged on to some other computer.

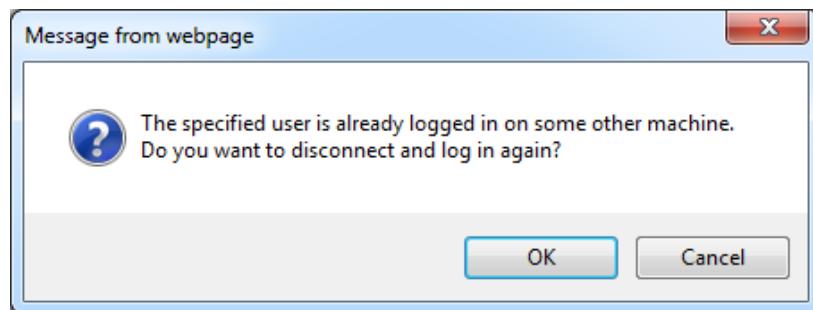


Figure: 2.5

7. Click **OK** button to disconnect the specified user and log you with the same username and password.

8. Click the **Cancel** button to invoke the Login screen again, where you can login using a new username and password.

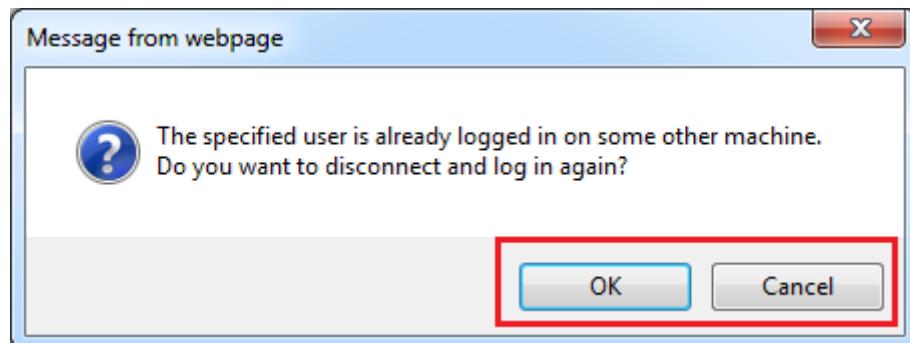


Figure: 2.6

9. If the entered login credential are incorrect, an error message; **Invalid Login Information** appears on the screen.

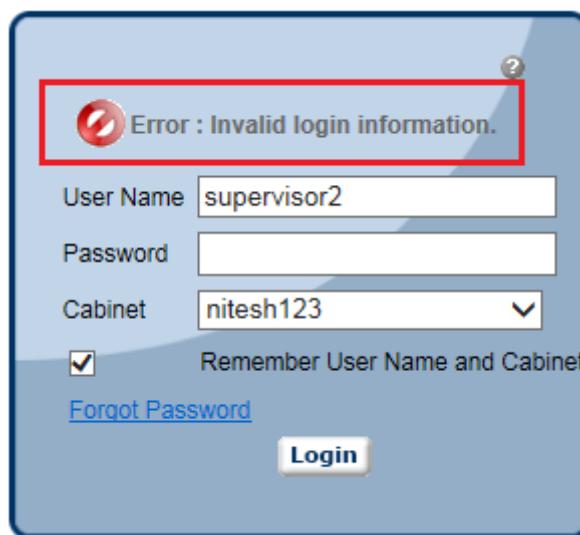


Figure: 2.7

NOTE:

If a user account is deleted from an Omnidocs cabinet, the same user account cannot be registered again for the same cabinet.

2.2 OmniDocs Interfaces

There are two interfaces of OmniDocs web

1. Web Desktop
2. Master Desktop

2.2.1 OmniDocs Web Desktop

1. After login, the **OD Web Desktop** screen appears as a default screen.

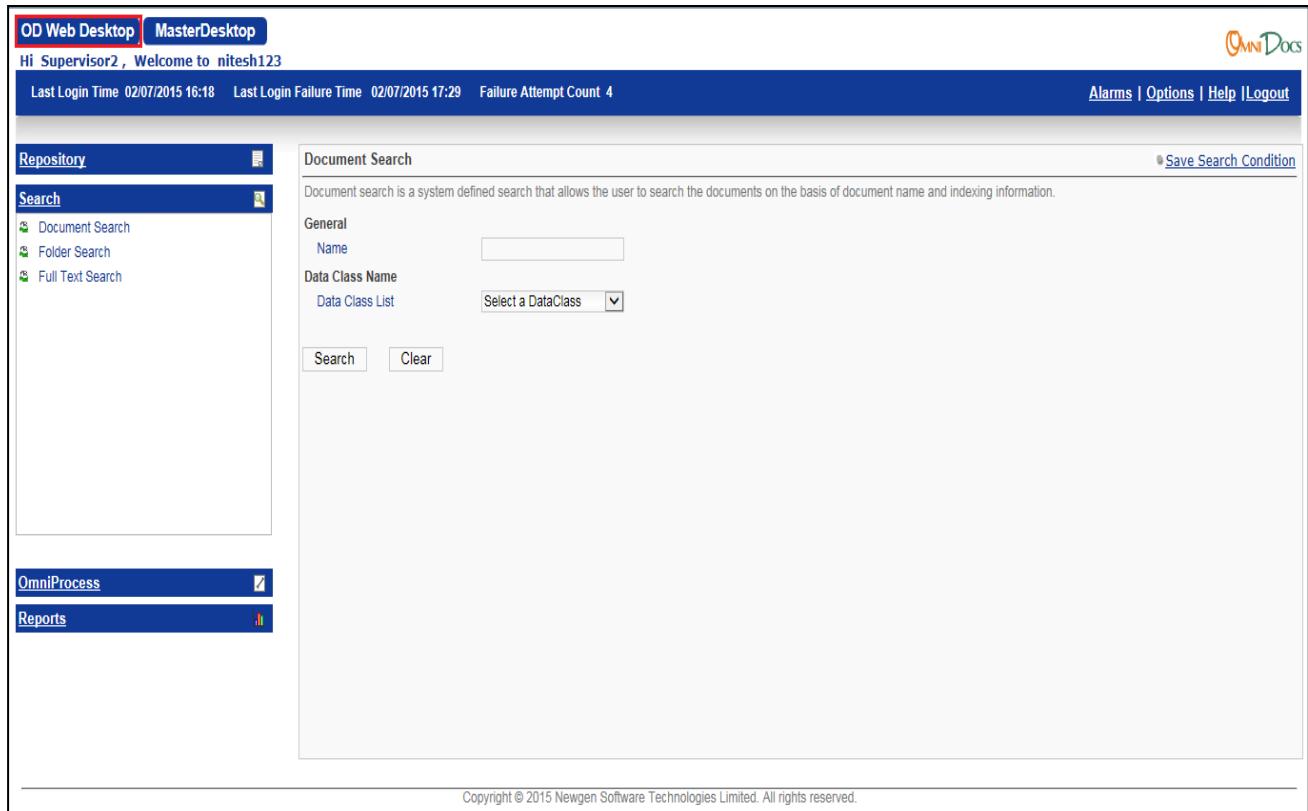


Figure: 2.8

2. After the successful login with the correct logon information the number of **Failure attempt count** along with the **Last Login Failure Time** appears on the main screen.

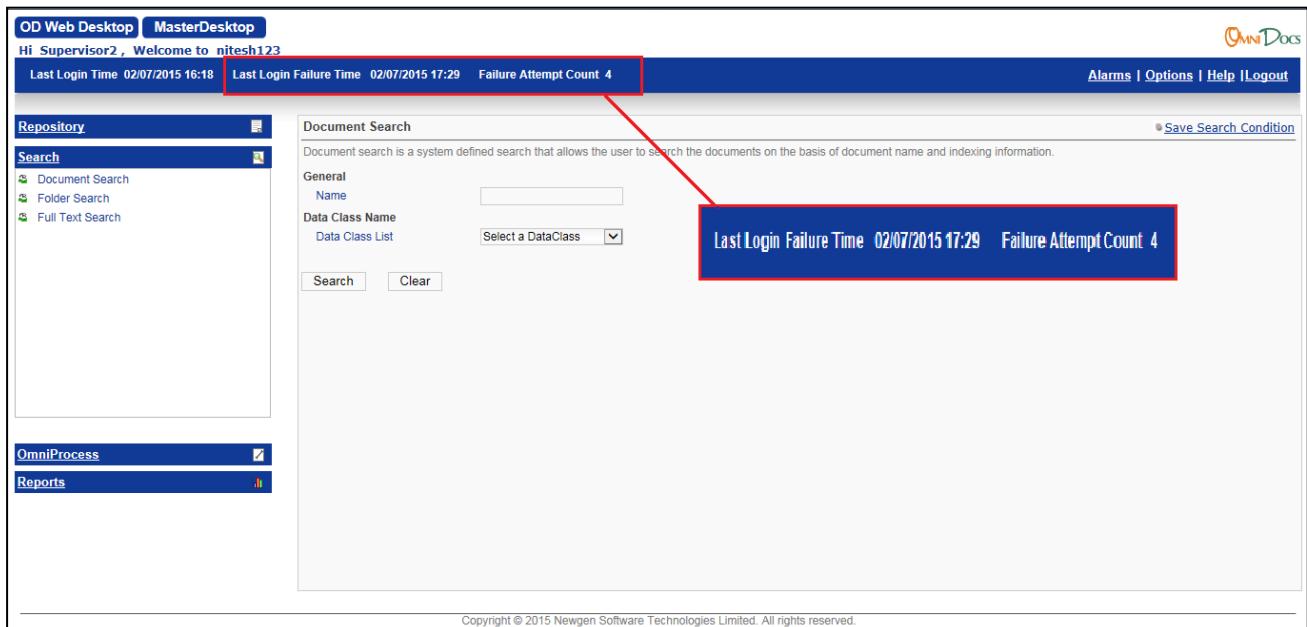


Figure: 2.9

3. The maximum number of **login attempts** is configurable by OmniDocs Administrator. If a user is unable to logon with the provided login attempts, the OmniDocs user account will get locked. The OmniDocs Administrator, Supervisor, or a member of the Supervisor Group, can unlock such locked user accounts.
4. The Home screen of OmniDocs Web Desktop is divided into two panes, left pane and the right pane. The right pane is the data pane and **Repository**, **Search**, **OmniProcess** and **Reports** are present in the left pane of the screen.

Working with OmniDocs

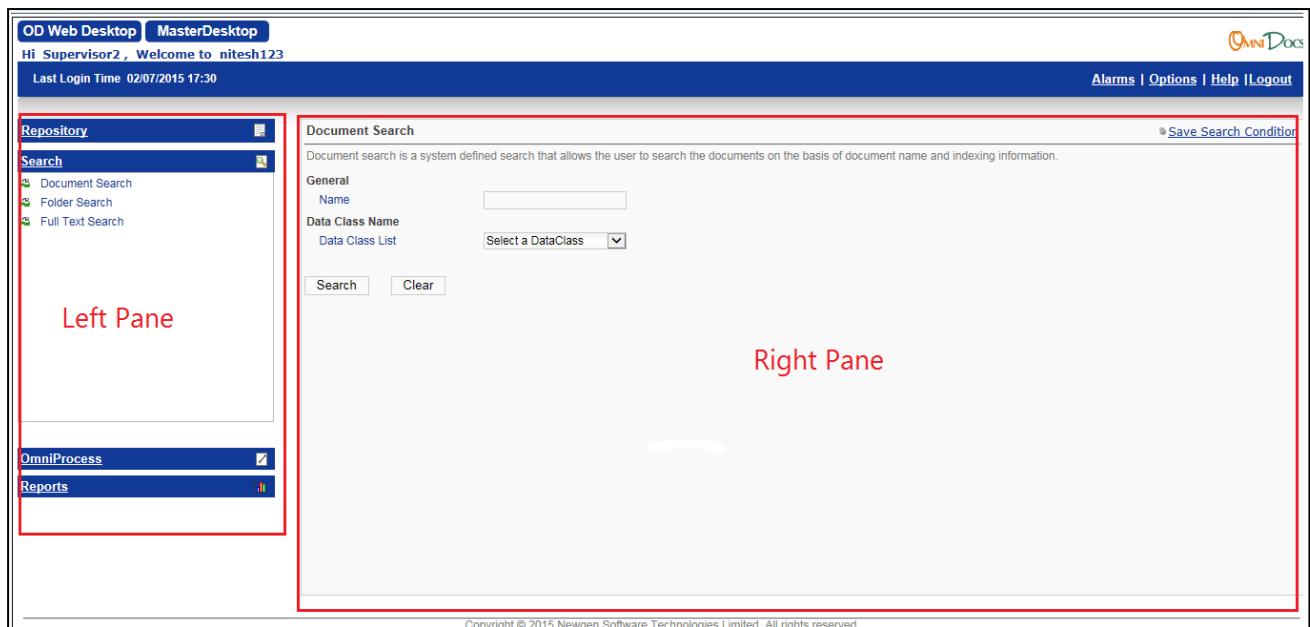


Figure: 2.10

2.2.1.1 Data/Media View

In OD Web Desktop, there are now two views available for document view. These two views are as follows:-

- Data View
- Media View

Working with OmniDocs

In Data View, which is appropriate for viewing images and documents, following screen appears:-

The screenshot shows the OmniDocs Data View interface. At the top, there's a header bar with the text "OD Web Desktop MasterDesktop", "Hi Supervisor, Welcome to Zurich_test2", "Last Login Time 04/05/2016 18:04", and the OmniDocs logo. Below the header is a navigation menu with links for "Alarms | Options | Help | Logout". The main area is titled "Repository" and contains a tree view of folder structure: "Folder(s)" with "1111" expanded, showing "Motor". To the right is a large table titled "Zurich_test2" displaying file details. The columns are: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and L. The table lists several "1.jpg" files (JPG type, owner anurag, size 173.54 KB) and one "How To Use OmniDocs WebServices" document (DOC type, owner Supervisor, size 245.00 KB). At the bottom of the table, there are navigation links "< Prev" and "Next >". The footer of the page includes the copyright notice "Copyright © 2016 Newgen Software Technologies Limited. All rights reserved."

Name	Type	Owner	Size	Order No	Pages	Version	Modified Date	Data Class	Useful Info	Annotated	L
1.jpg	JPG	anurag	173.54 KB	1	1	1.0	18/06/2015 10:58	Test_DC	N	N	
1.jpg	JPG	anurag	173.54 KB	2	1	1.0	18/06/2015 11:04	Test_DC	N	N	
1.jpg	JPG	anurag	173.54 KB	3	1	1.0	18/06/2015 11:08	Test_DC	N	N	
1.jpg	JPG	anurag	173.54 KB	4	1	1.0	18/06/2015 11:24	Test_DC	N	N	
1.jpg	JPG	anurag	173.54 KB	5	1	1.0	18/06/2015 11:51	Test_DC	N	N	
1.jpg	JPG	anurag	173.54 KB	6	1	1.0	18/06/2015 13:01	Test_DC	N	N	
How To Use OmniDocs WebServices	DOC	Supervisor	245.00 KB	7	1	1.0	04/05/2016 16:13	Confidential_Documents	N	N	

Figure: 2.11

In this view, following properties of the documents are visible:-

- **Document Name**
- **Document Type**
- **Owner**
- **Size**
- **Order No.**
- **Pages**
- **Version**
- **Modified Date**
- **Data Class**
- **Useful Info**
- **Annotated**
- **Lined Documents**

Working with OmniDocs

In Media View, which is appropriate for viewing Media Files, following screen appears:-

The screenshot shows the OmniDocs Media View interface. At the top, there are tabs for "OD Web Desktop" and "MasterDesktop". The main header includes the text "Hi Supervisor, Welcome to Zurich_test2", the "Last Login Time" (04/05/2016 18:04), and links for "Alarms | Options | Help | Logout". On the right side of the header is the "OMNIDocs" logo.

The left sidebar contains sections for "Repository", "Search", "OmniProcess", and "Reports". The "Repository" section shows a tree view with "Folders(s)" expanded, revealing a folder named "1111" which contains a sub-folder "Motor".

The central content area displays a table titled "Zurich_test2" with the following columns: Name, Type, Owner, Size, Bit Rate, Codec, Duration, Frame Rate, Height, Sample Rate, Title, and Width. The table lists several files, all of which are "1.jpg" files owned by "anurag" and have a size of 173.54 KB. There is also one "How To Use OmniDocs WebServices" document owned by "Supervisor" with a size of 245.00 KB.

At the bottom of the interface, there is a copyright notice: "Copyright © 2016 Newgen Software Technologies Limited. All rights reserved."

Name	Type	Owner	Size	Bit Rate	Codec	Duration	Frame Rate	Height	Sample Rate	Title	Width
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
How To Use OmniDocs WebServices	DOC	Supervisor	245.00 KB								

Figure: 2.12

In this view, following properties of the documents are visible:-

- **Document Name**
- **Document Type**
- **Owner**
- **Size**
- **Bit Rate**
- **Codec**
- **Duration**
- **Frame Rate**
- **Height**
- **Sample Rate**
- **Title**
- **Width**

Working with OmniDocs

To change the view, click on **the Data/ Media View** link present on the Right Side of the screen.

The screenshot shows the OmniDocs Web Desktop interface. At the top, there are tabs for 'OD Web Desktop' and 'MasterDesktop'. A welcome message says 'Hi Supervisor, Welcome to Zurich_test2' and 'Last Login Time 04/05/2016 18:04'. On the right, there are links for 'Alarms | Options | Help | Logout' and the 'OMNIDOCs' logo. The main area has a 'Repository' sidebar with 'Folder(s)' containing '1111' and 'Motor'. Below the sidebar is a table titled 'Zurich_test2' with a red box around the 'Data View' link in the header. The table columns are Name, Type, Owner, Size, Bit Rate, Codec, Duration, Frame Rate, Height, Sample Rate, Title, and Width. There are seven rows of data, all labeled '1.jpg' except for the last one which is 'How To Use OmniDocs WebServices'. The footer contains a copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Name	Type	Owner	Size	Bit Rate	Codec	Duration	Frame Rate	Height	Sample Rate	Title	Width
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
1.jpg	JPG	anurag	173.54 KB								
How To Use OmniDocs WebServices	DOC	Supervisor	245.00 KB								

Figure: 2.13

2.2.2 OmniDocs MasterDesktop

1. After login, the **OD Web** Desktop screen appears as a default screen. Click MasterDesktop to launch **MasterDesktop** main screen.

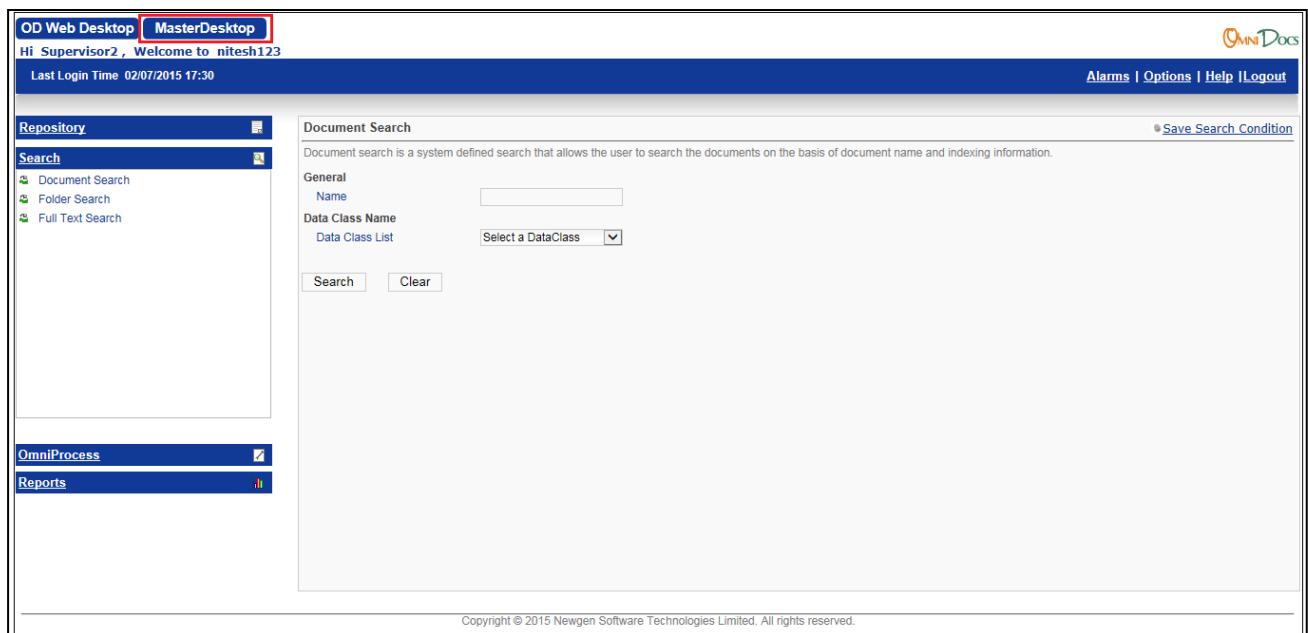


Figure: 2.14

Working with OmniDocs

2. The MasterDesktop main screen of the specified shared cabinet appears showing the **tool bar** at the top of the screen, **system-defined folders**: Inbox, Sent Items, and Trash, folders and documents present in the cabinet on the left pane and information on the right pane.

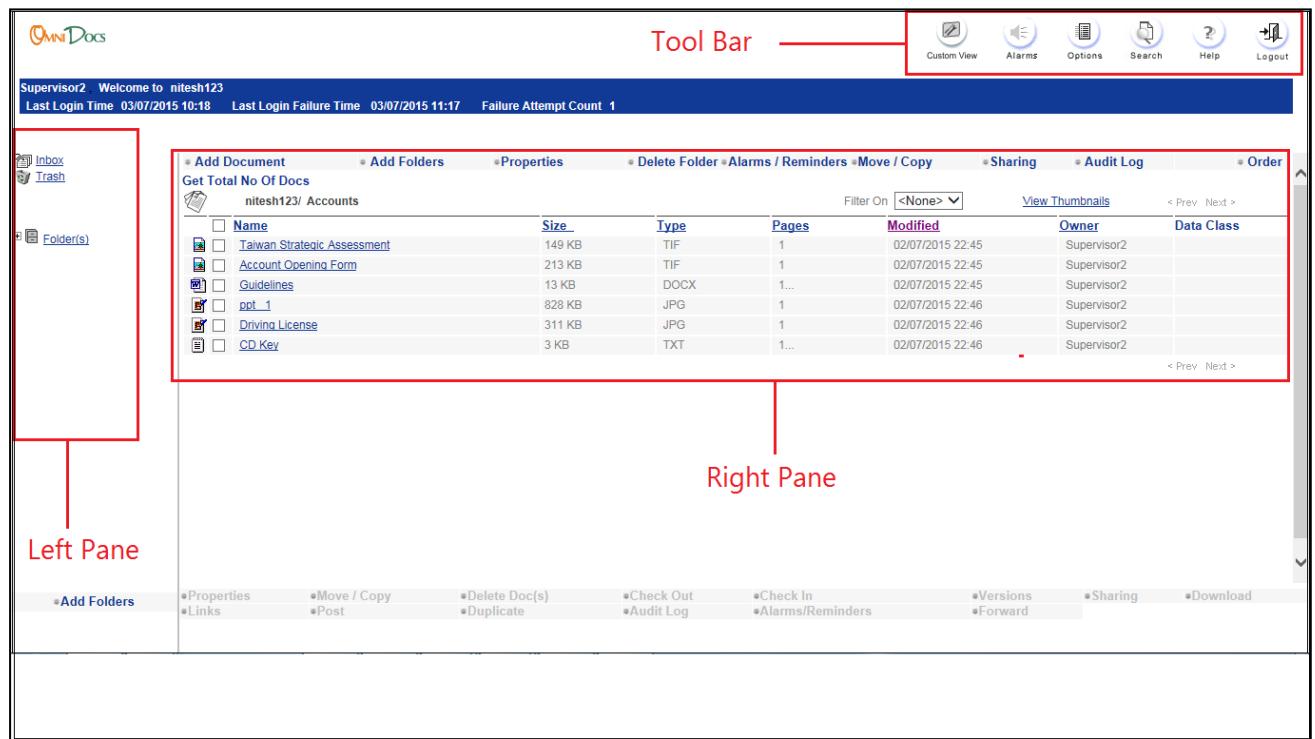
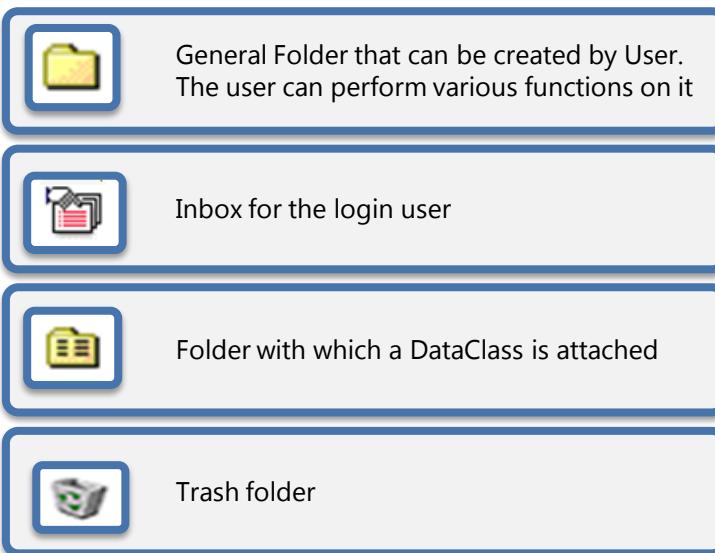


Figure: 2.15

3. Only the **Read rights** assigned folders and documents would be visible to the user.

The folders can be of following types:



4. By default, the user has Read rights on all the folder/documents. If a dataclass is associated to the folders/documents, then to view those folders/documents; user must have Read rights on the particular dataclass which is associated with folders/documents.

By default, user has no rights on dataclass. Admin can provide Read, Associate, De-Associate and Modify field value rights on dataclass. Further, Admin can provide the rights on the field value of dataclass.

Tool Bar

The Tool Bar has following options



Custom View: Enables you to launch OmniDocs MasterDesktop



Alarms: Enables you to view the Alarms/Reminders for the login User.



Options: Enables you to set Preferences, send Notification, view and add contacts in the Personal Address Book.



Search: Enables you to search for documents. The search can be made on General properties, DataClass, and global indexes. Content Search (FTS Search) is also provided in case of SQL and Oracle Database.



Help: Invokes Help



Logout: Enables to Logout from OmniDocs Web

2.3 Working with Folders

You can perform the following operations on the folders:

-  Add folders
-  Add sub-folders
-  Delete folders
-  Add Documents
-  View Properties of a folder
-  Share a folder
-  Move/Copy
-  Set Alarms/Reminders
-  View Audit Log
-  Order folder contents
-  Search

2.3.1 Adding Folders

To add a folder:

1. Click the **Add Folders** link on the Main screen of the OmniDocs Web Desktop.

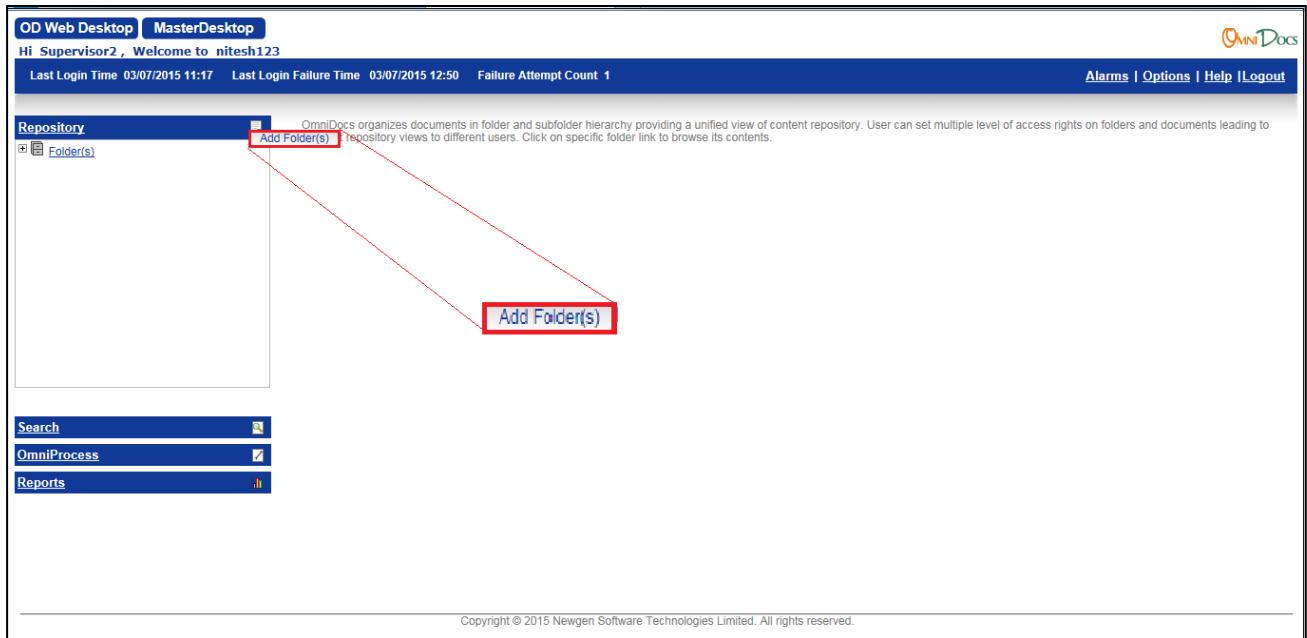


Figure: 2.16

In the main screen of OD MasterDesktop, click **Add Folders** link as shown:

Working with OmniDocs

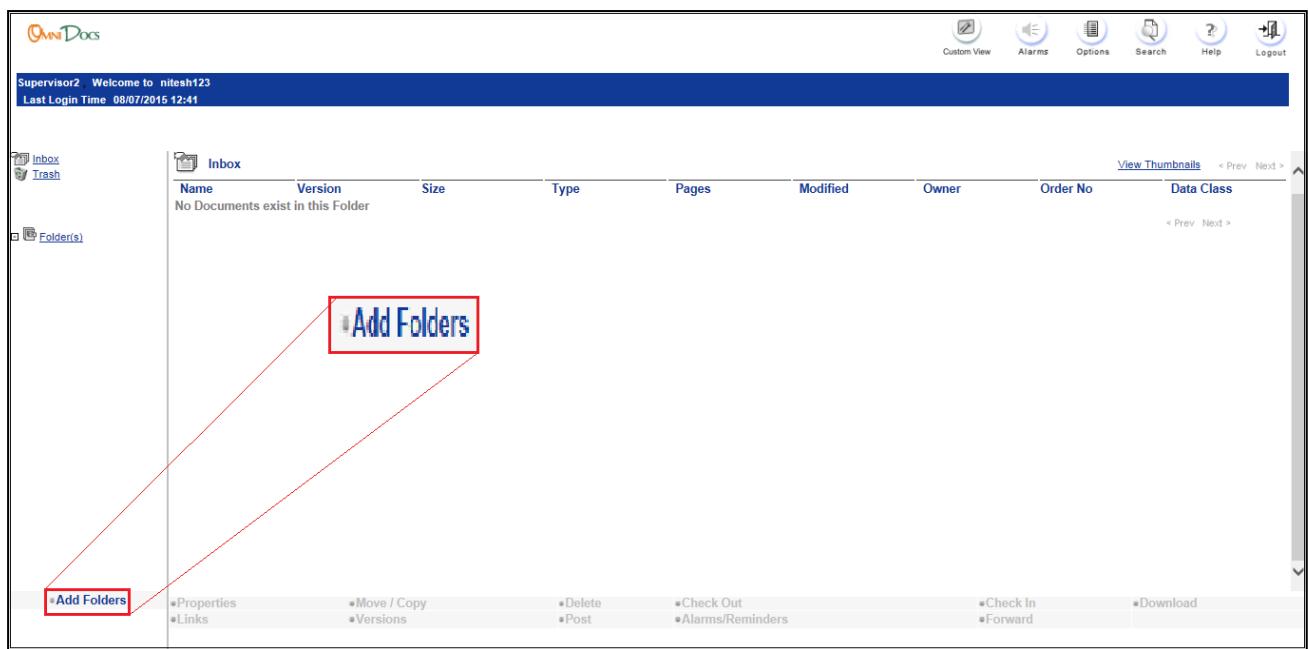


Figure: 2.17

2. The **Add Folders** screen appears. The user can add **Root Level folders** (i.e. under the shared cabinet) at this stage.
3. Type the folder names in the **Folder Name** text boxes and then click the **Add** command button to create the specified folder. The Add Folders screen is modified and the text boxes where you typed the folder names appear blank.

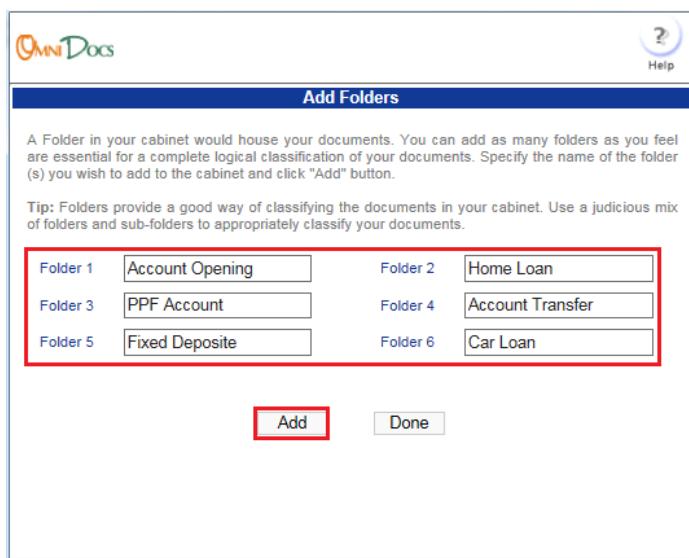


Figure: 2.18

4. Repeat the above steps to continue adding folders at the root level.

To save the changes made and to close the **Add Folders** screen, click **Done** button.

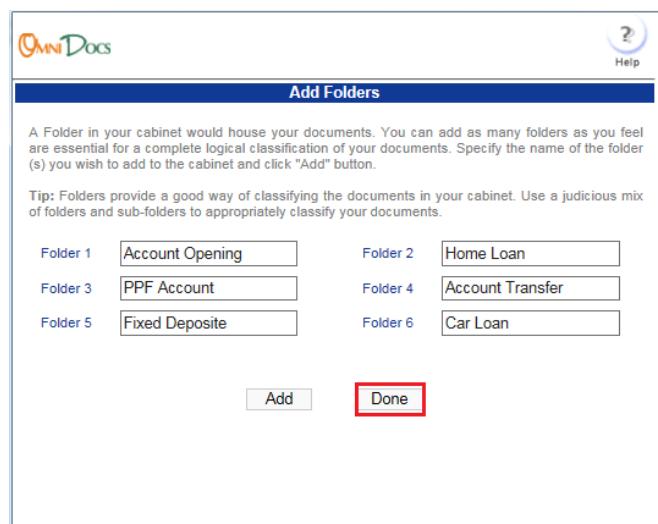


Figure: 2.19

5. The left pane of the main screen display's the list of created folders.

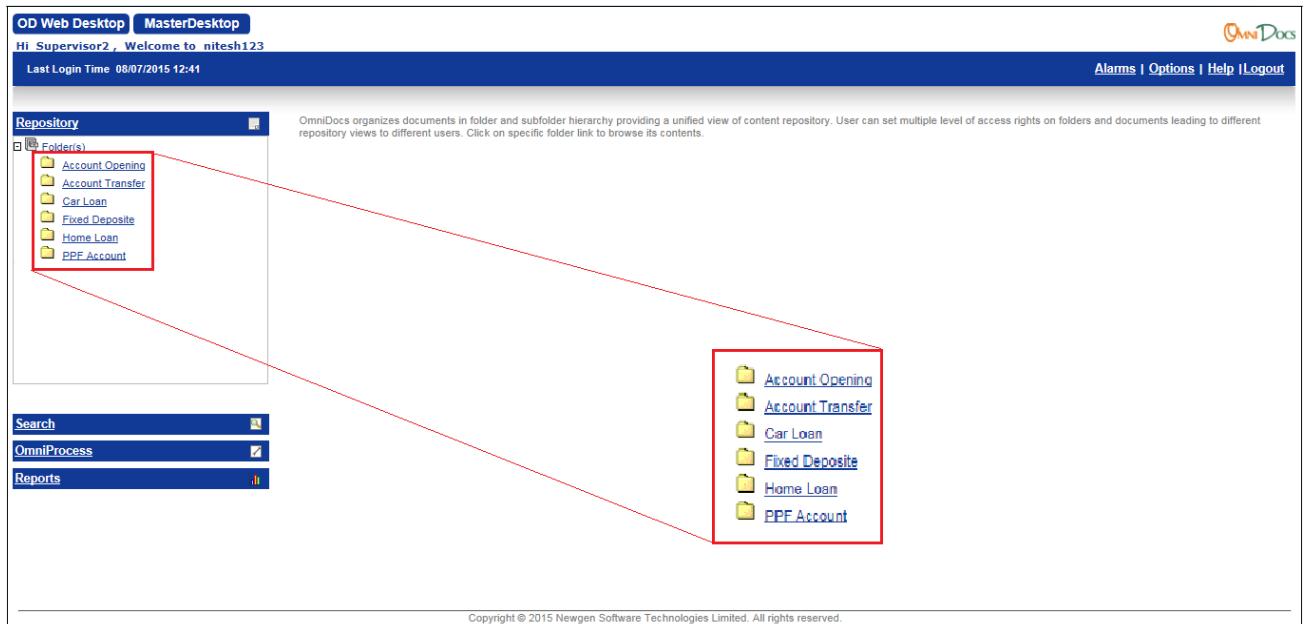


Figure: 2.20

2.3.2 Adding Sub-Folders

A **sub-folder** is a folder within a folder.

To add sub-folder or folders within a folder:

1. Click the required folder within which you want to create a sub-folder. The Folder Information appears on the right pane of the Main screen showing the contents of the folder.

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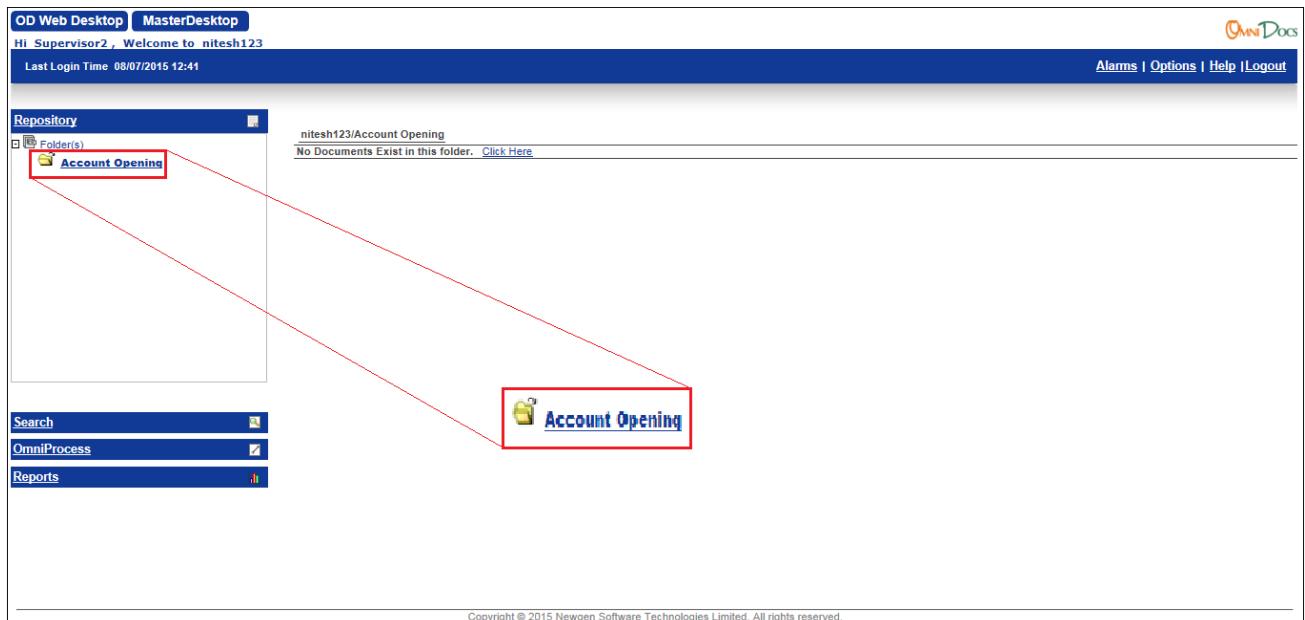


Figure: 2.21

2. Click the **Add Folder** link on the left pane of the main screen of the OmniDocs Web Desktop.

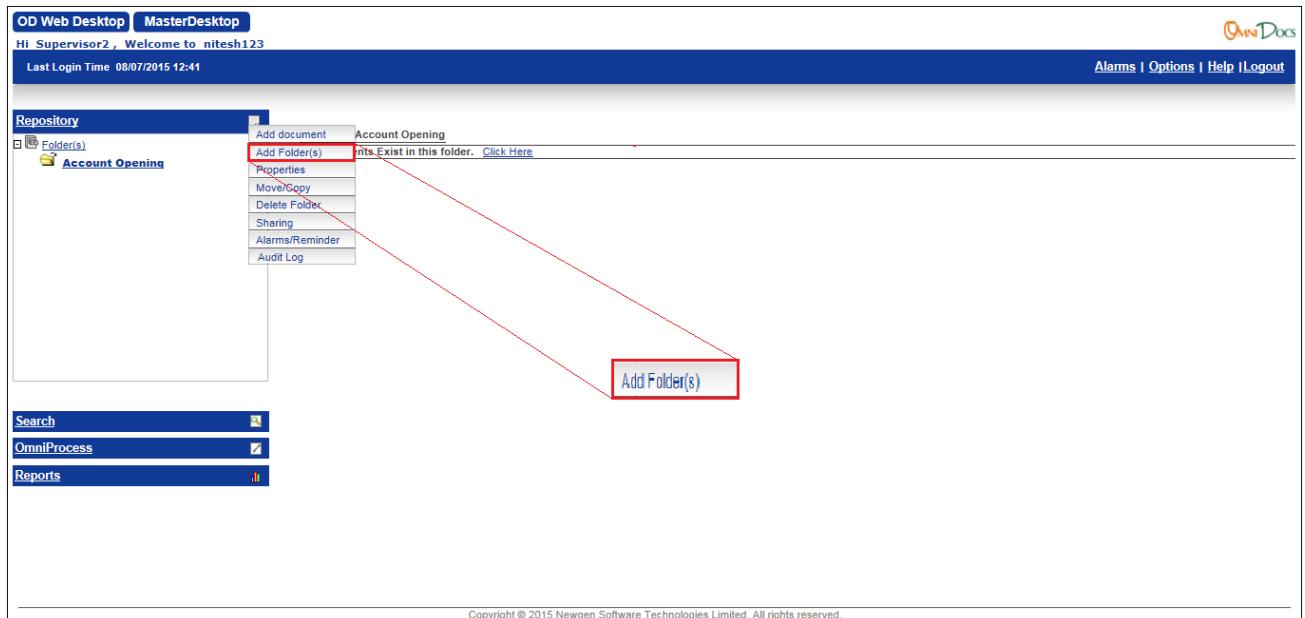


Figure: 2.22

Working with OmniDocs

3. Click the **Add Folder** link on the right pane of the main screen of the MasterDesktop

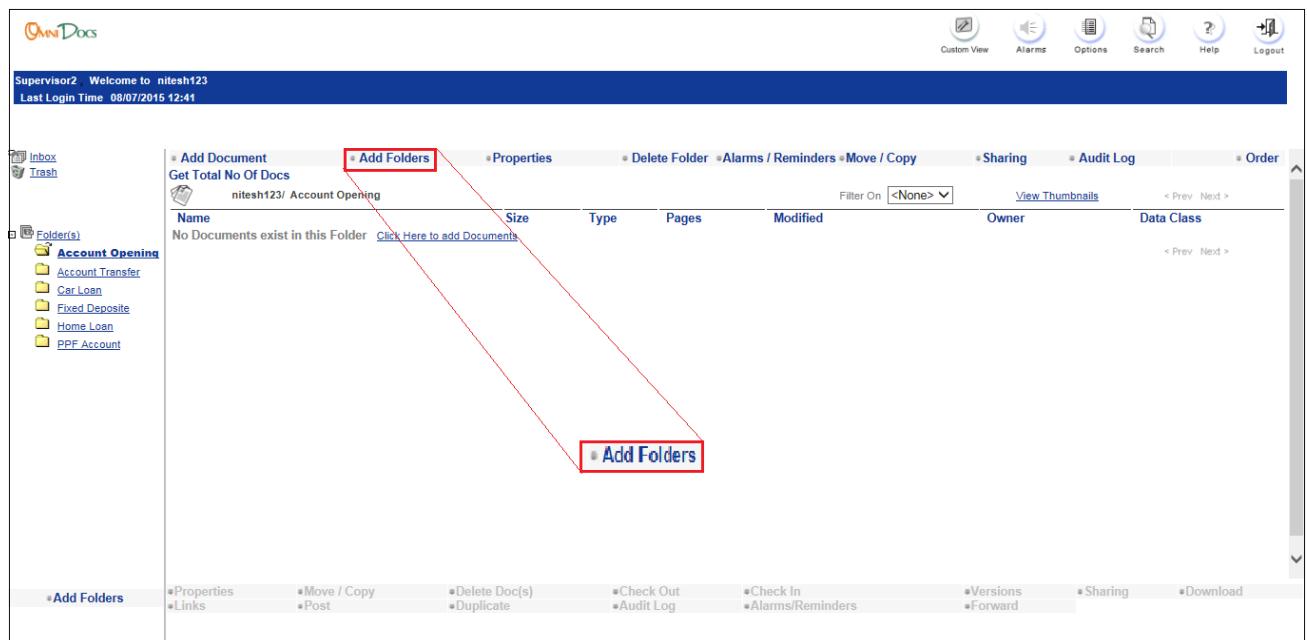


Figure: 2.23

4. The **Add Folders** screen, with options to create sub-folders at the root level and at a specific location, appears.

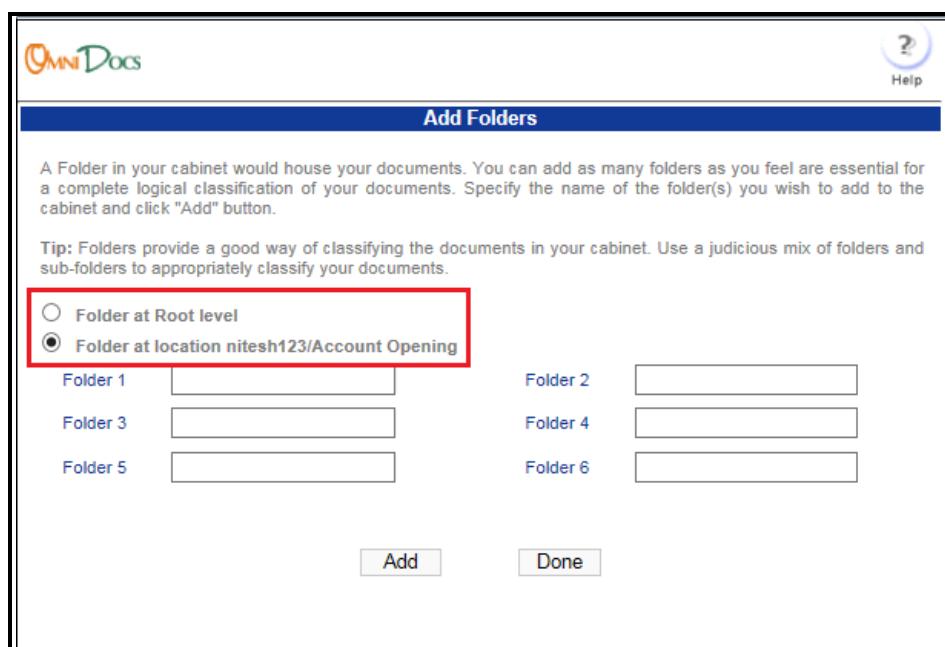


Figure: 2.24

5. Select the Root Level option to create subfolder at the root level.
6. Select the option Location: <cabinet name>/<folder name> to create a sub-folder at the current path.
7. Type the sub-folder names in the Folder Name text boxes.
8. Click the **Add** command button to create the specified sub-folders. The Add Folder screen is modified and the text boxes where you typed the folder names appear blank

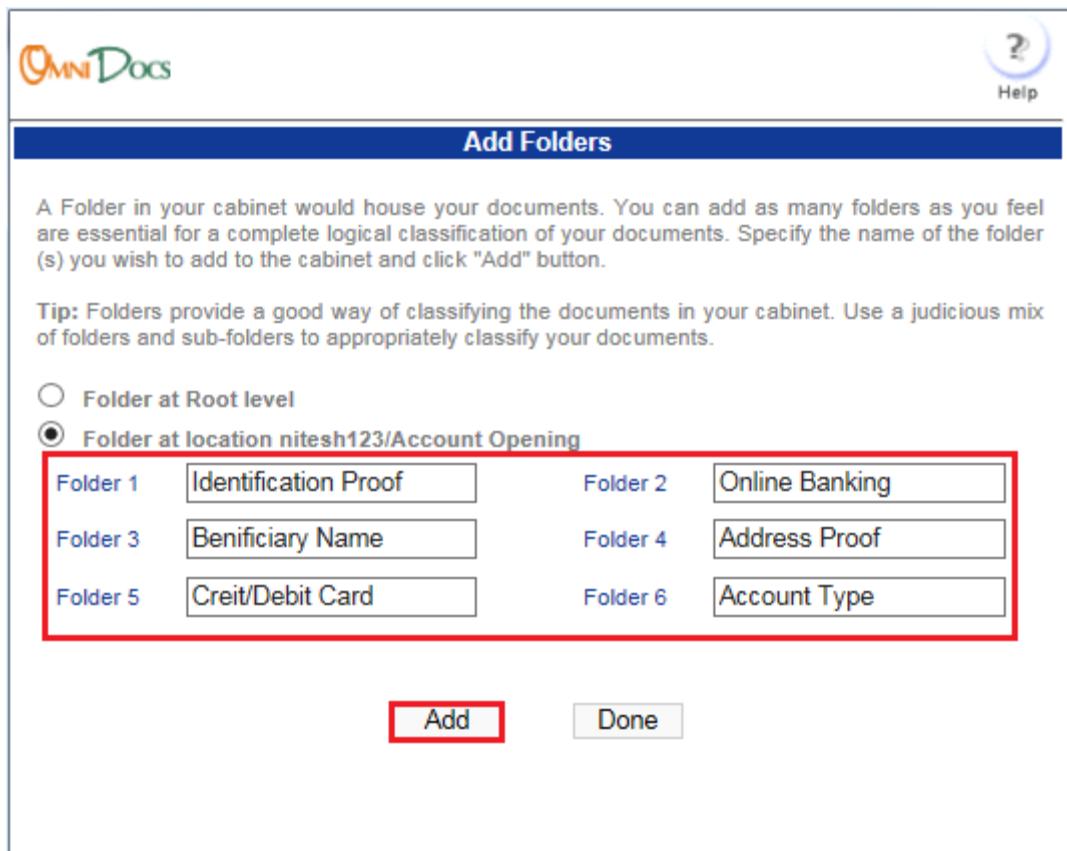


Figure: 2.25

9. Repeat above steps to continue adding sub-folders to the same folder.

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10. To save the changes made and to close Add Folder screen, click **Done** button. You will return to Main screen.

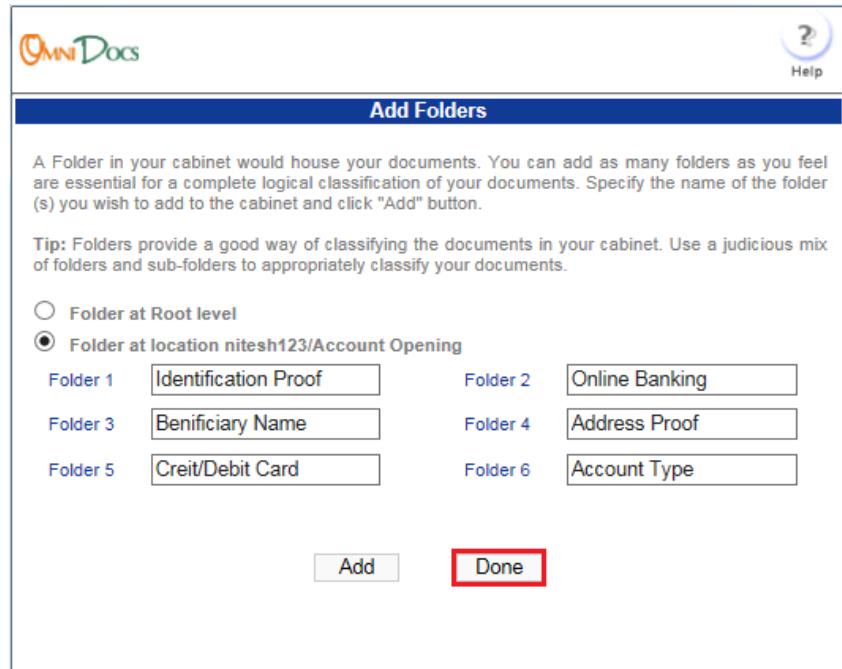


Figure: 2.26

11. The **Plus (+)** sign beside a folder on the left pane of the Main screen shows the folder contains sub-folders.

Working with OmniDocs

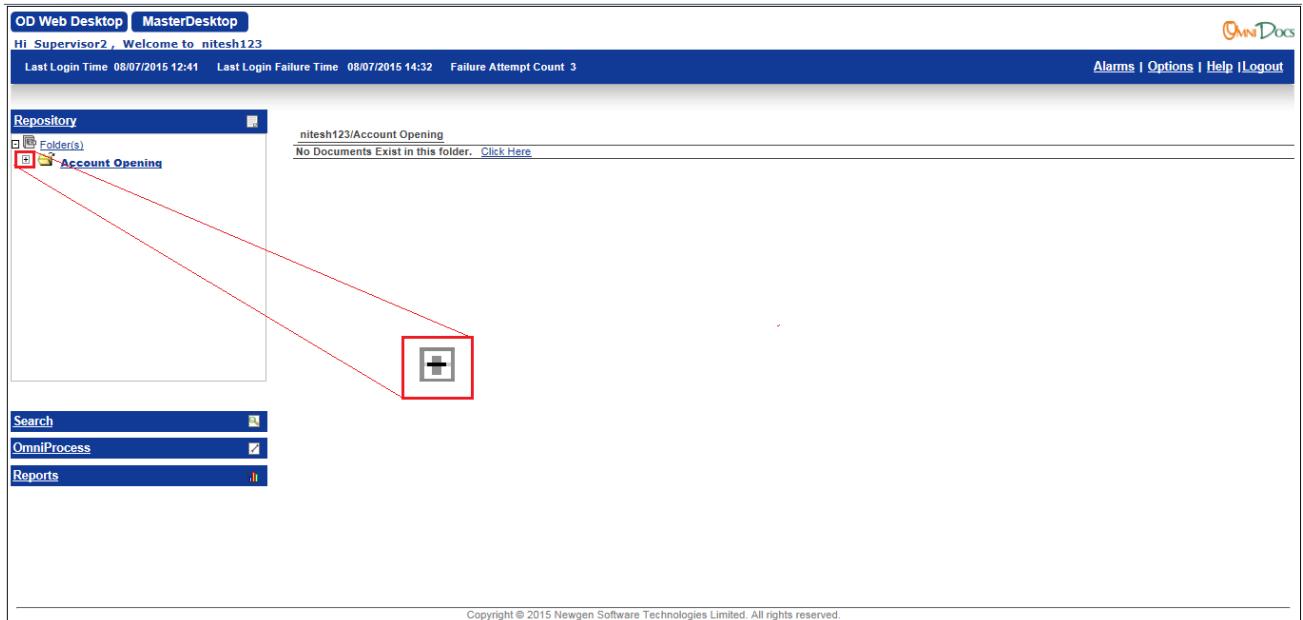


Figure: 2.27

12. Click the **Plus (+)** sign to expand the node to see the sub-folders within a folder.

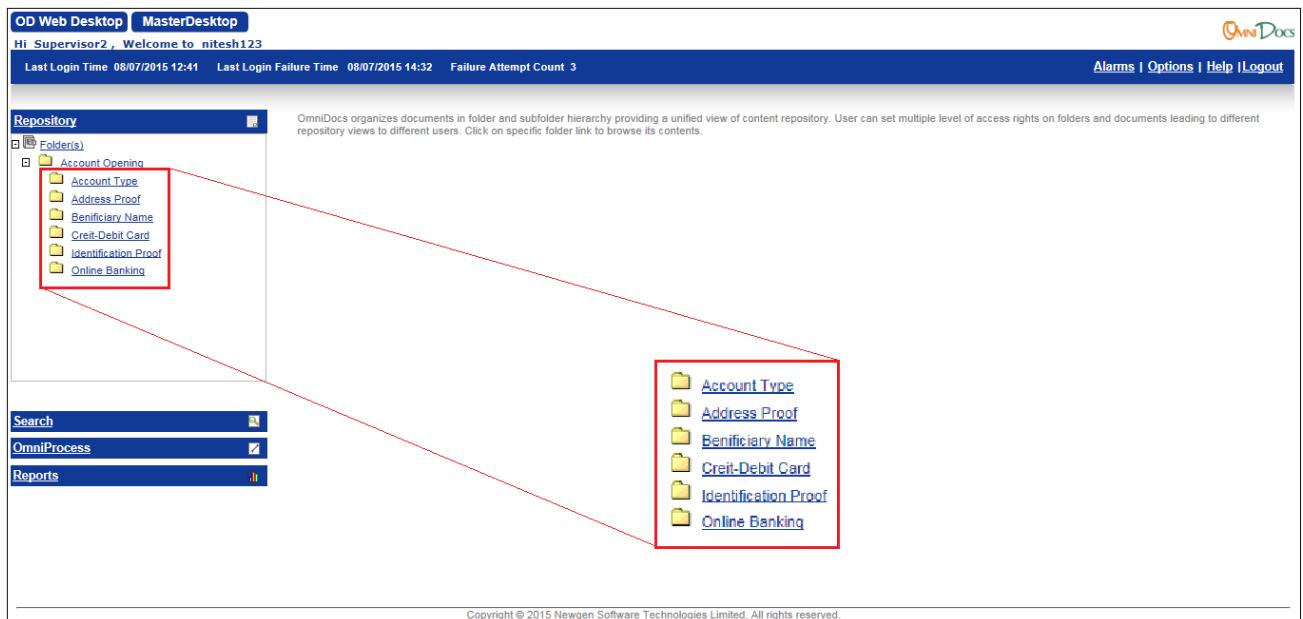


Figure: 2.28

NOTE:

You can also create a folder at the root level from the Add Folder screen by selecting the Root Level option on the screen. To know more about creating folders at the root level see the [Adding Folders](#) section.

2.3.3 Deleting a Folder

To **delete** a folder:

1. Click the folder that you need to delete under the **Folders** link. The Folder Information screen appears on the right pane of the Main screen.

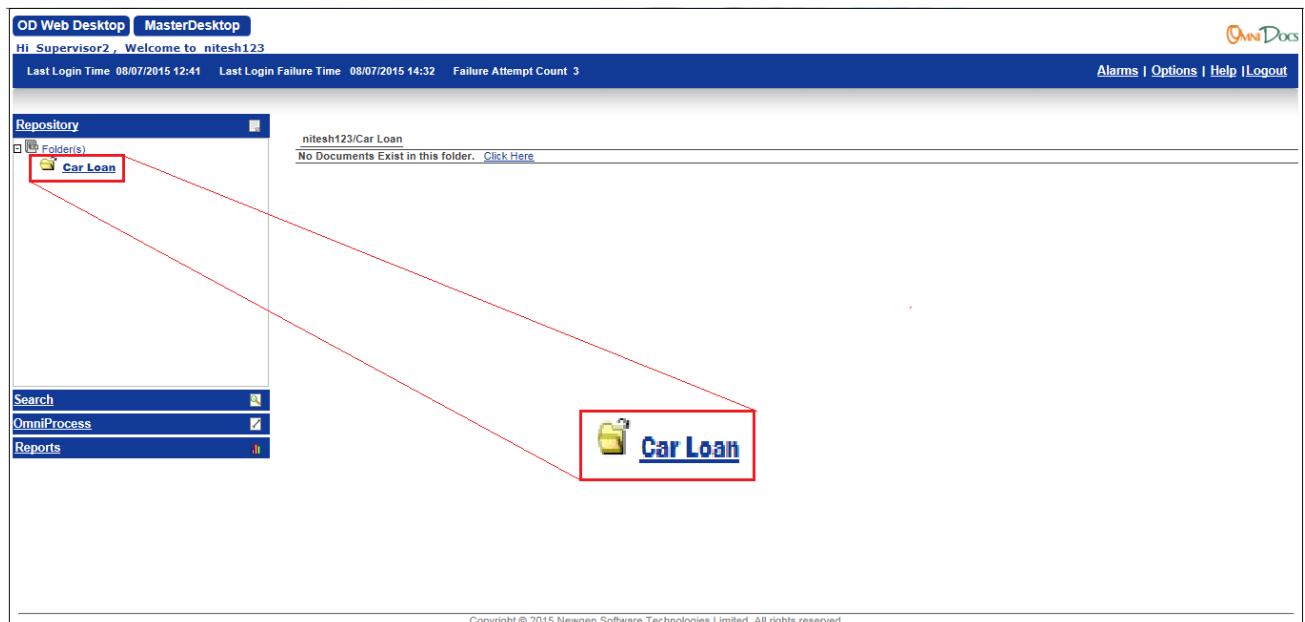


Figure: 2.29

2. Move the mouse pointer to an option icon; on the **Repository** bar. Click **Delete Folder** link.

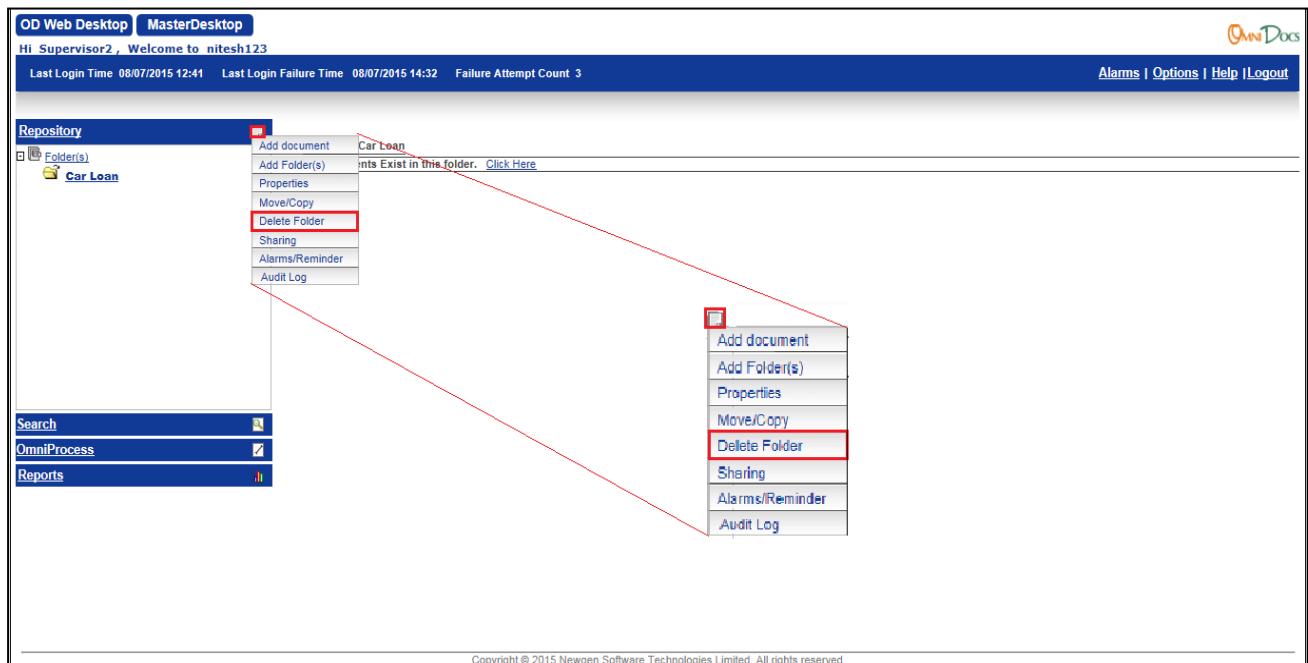


Figure: 2.30

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3. A message box appears. Click **OK** command button to move the selected folder and all its contents to the Trash folder else click the **Cancel** button to avoid deleting the folder.

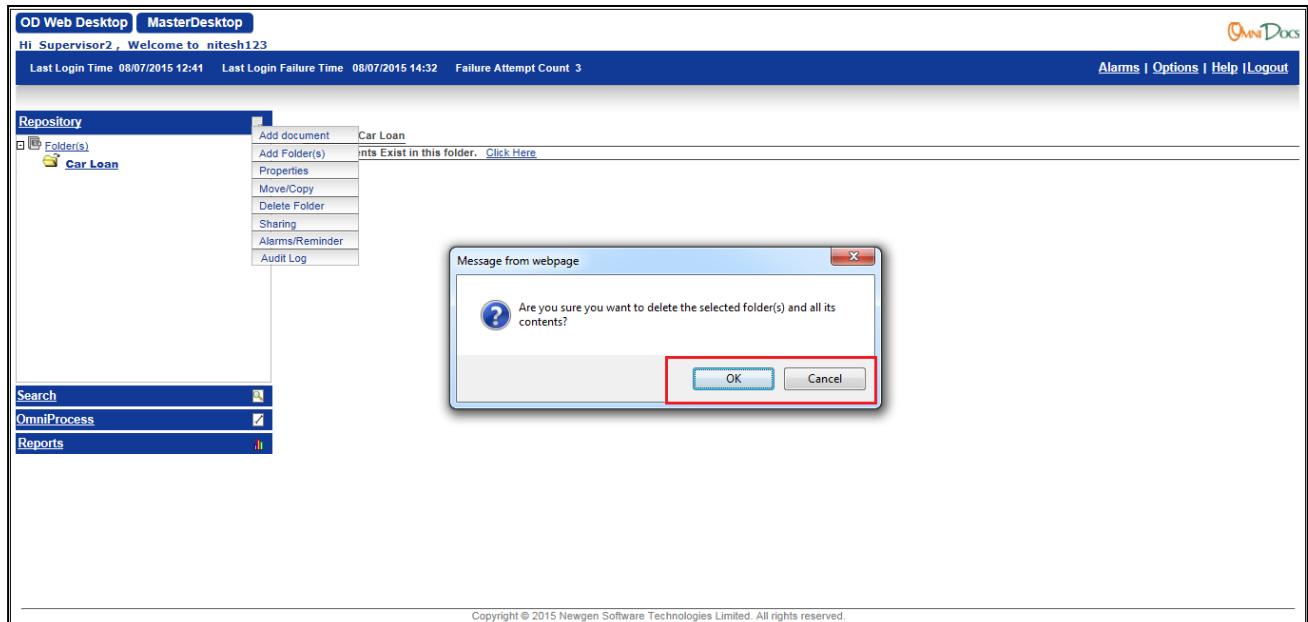


Figure: 2.31

4. If you click **OK**, the Main screen is modified with the left pane showing the list of folders without the folder that you delete.

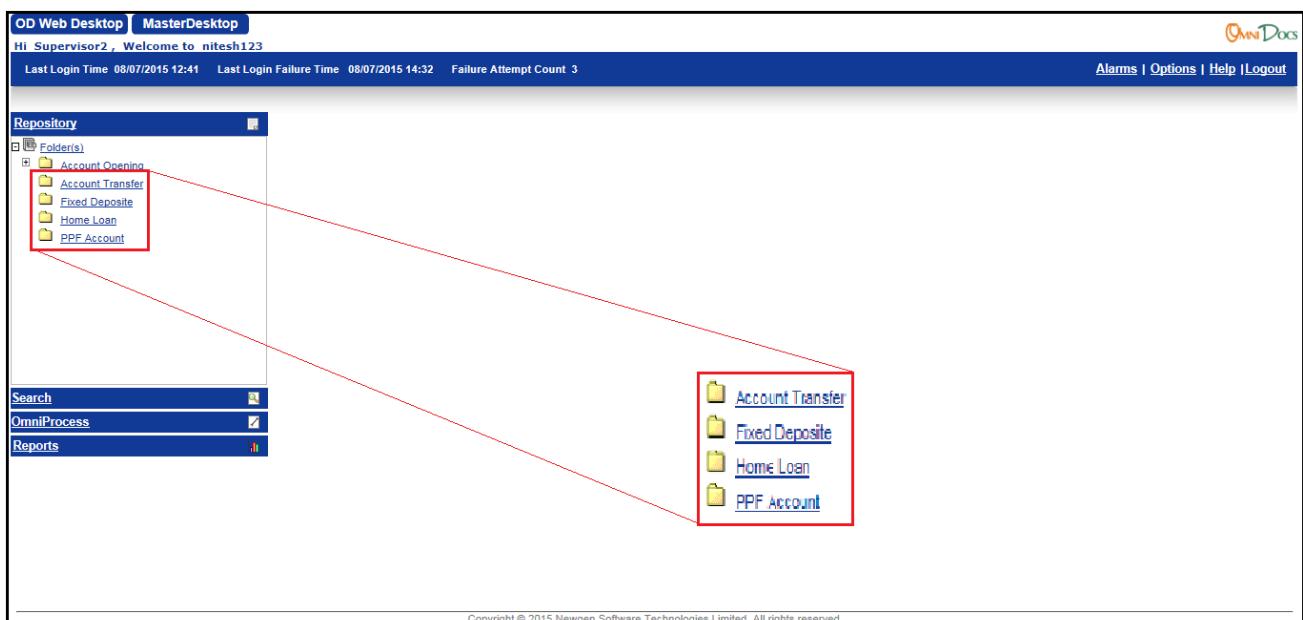


Figure: 2.32

5. To view the deleted folders, click the **Trash** link on the left pane of Master Desktop

Refer [Section 2.7 – Working with Trash.](#)

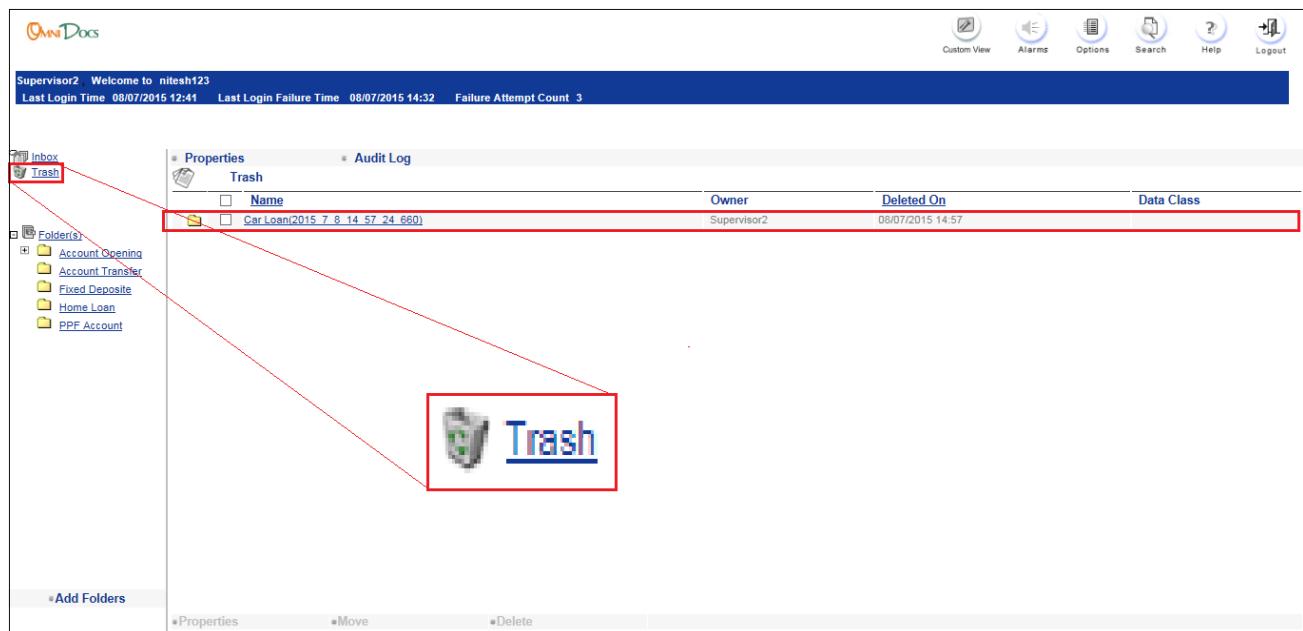


Figure: 2.33

2.3.4 Viewing Folders

The main folders and the sub-folders in the **Folders** link of the Main screen are displayed in batches.

The default **batch size** of a list displaying the folders/sub-folders at a time is **10**. Batches of 10-folders/sub-folders will be displayed on the screen at a time. A user can specify the batch size for the folders/sub-folders.

To specify the batch size:

1. Click the **Options** icon on the tool bar of MasterDesktop.

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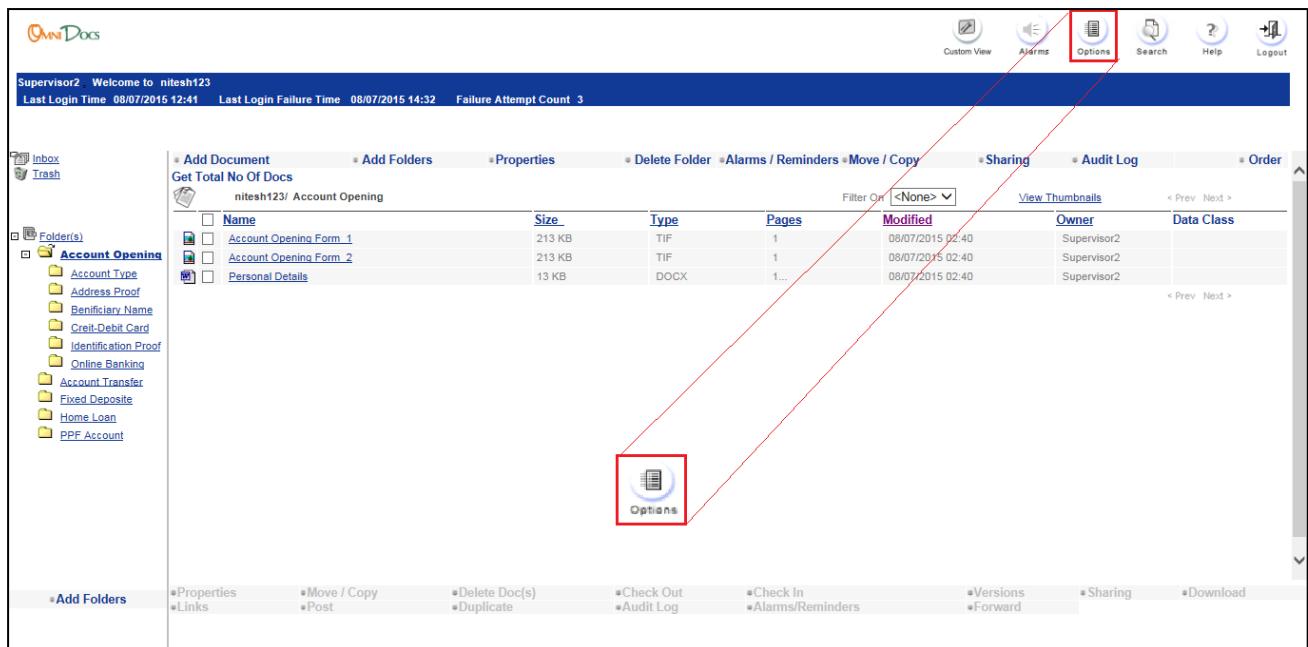


Figure: 2.34

2. The **Options** screen appears, by default **Personalize** tab appears selected.
3. Click the **Personal Settings** link on the Personalize tab page.

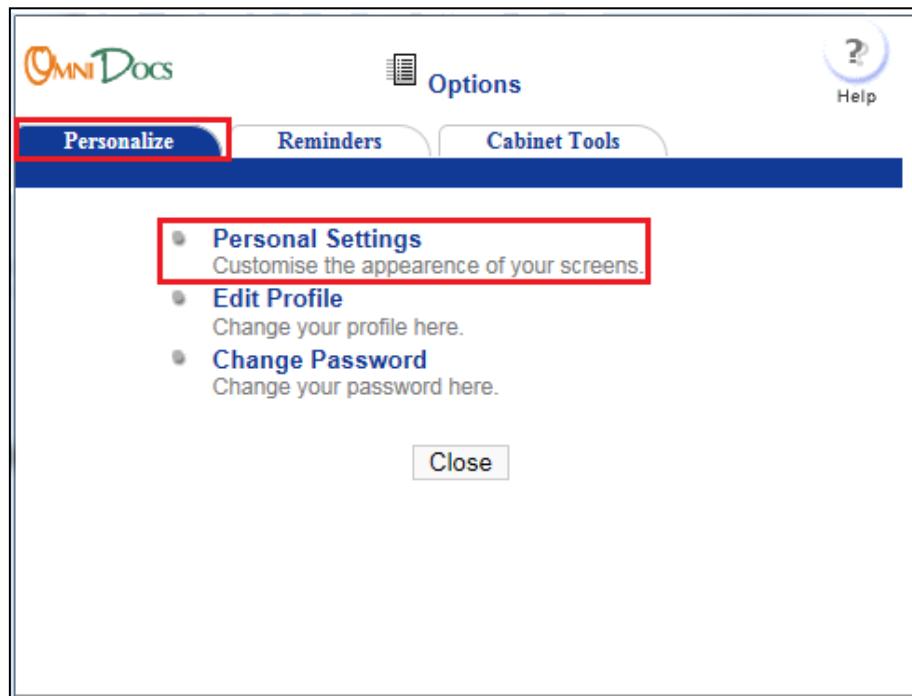


Figure: 2.35

4. The Personalize Settings screen appears. Select the batch size from the drop-down list in the various list boxes in **Batch Sizes For** area.

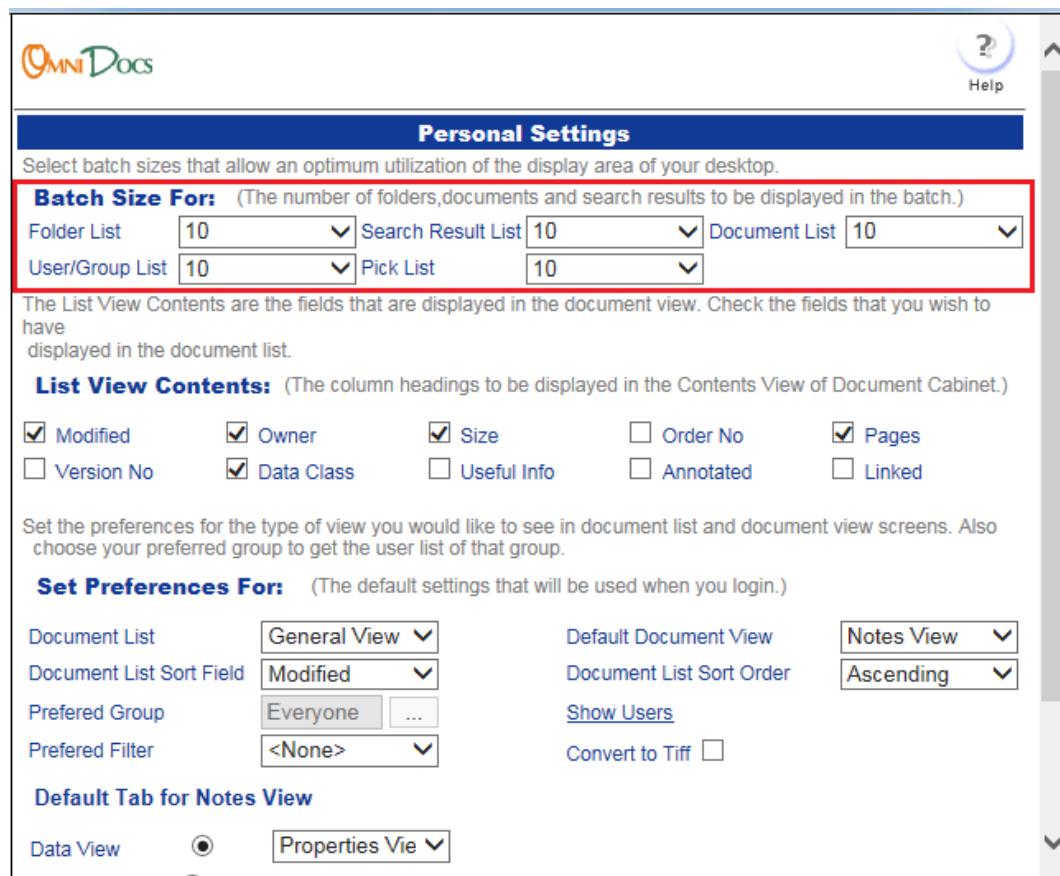


Figure: 2.36

5. Click **Save** to save the changes, else click **Cancel** to return to **Options** screen without saving the changes.

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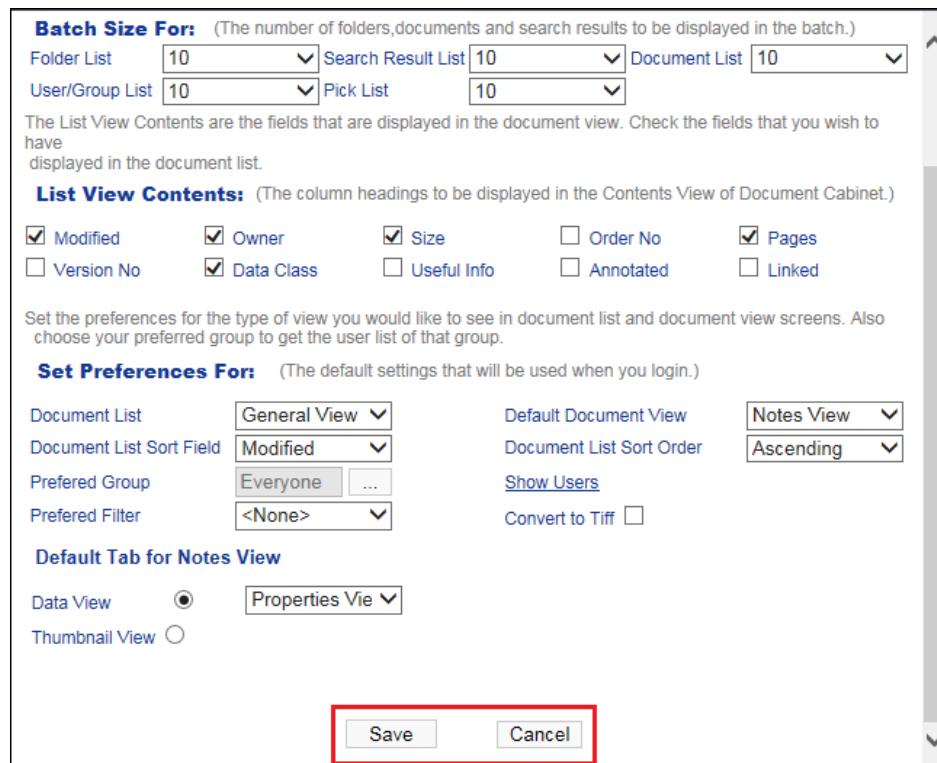


Figure: 2.37

6. Click **Close** button to return to the MasterDesktop main screen.

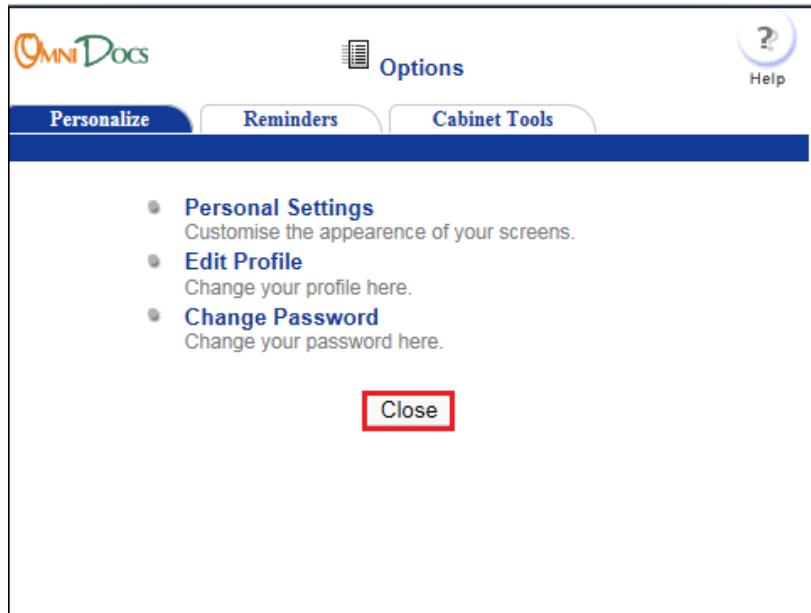


Figure: 2.38

7. Click the **Next** link on the left pane of the Main screen to see the next batch of folders/sub-folders or click **Previous** link to see the preceding batch of folders/sub-folders.

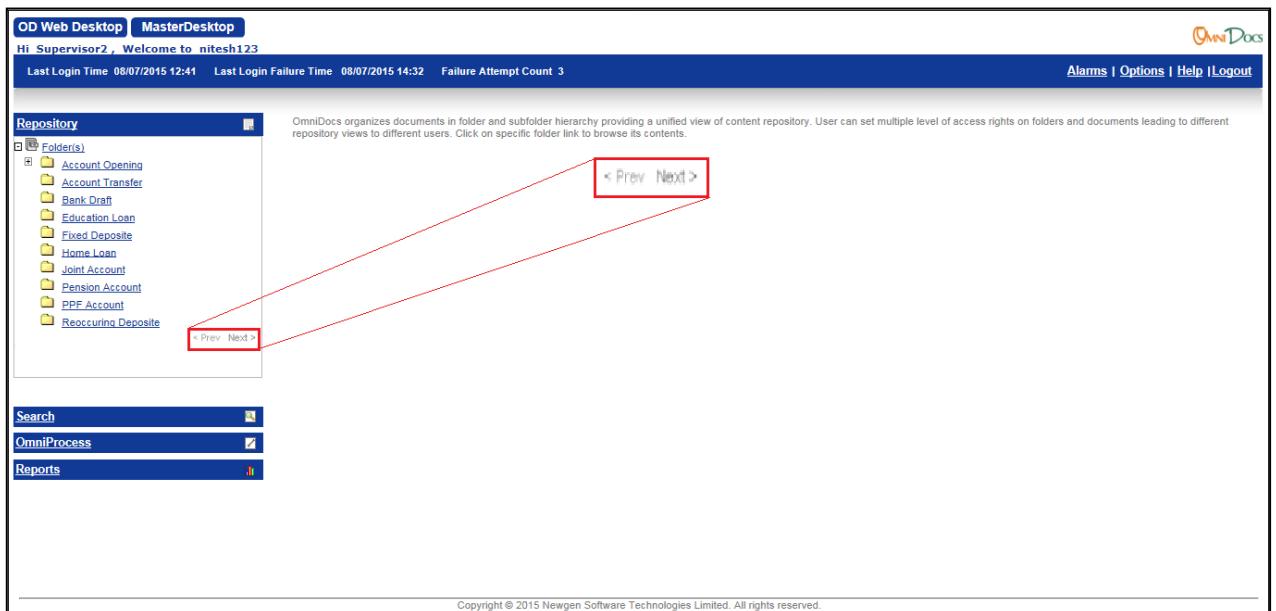


Figure: 2.39

NOTE:

The **minimum** and **maximum** batch size for the folders/sub-folders is **10** and **50** respectively.

2.3.5 Inbox

The **Inbox** of a user contains all the documents that have been posted to the logged-in user.

1. Click **Inbox** link on the MasterDesktop. The folder information screen appears on the right pane and shows the contents of the inbox.

The column headings for the Inbox documents are different from the normal documents. The Inbox documents are displayed under the following column headings – “Name, Version, Size, Type, Pages, Modified, Owner, Order No and Data Class”

The user can also **sort** the documents of the Inbox as per these column headings.

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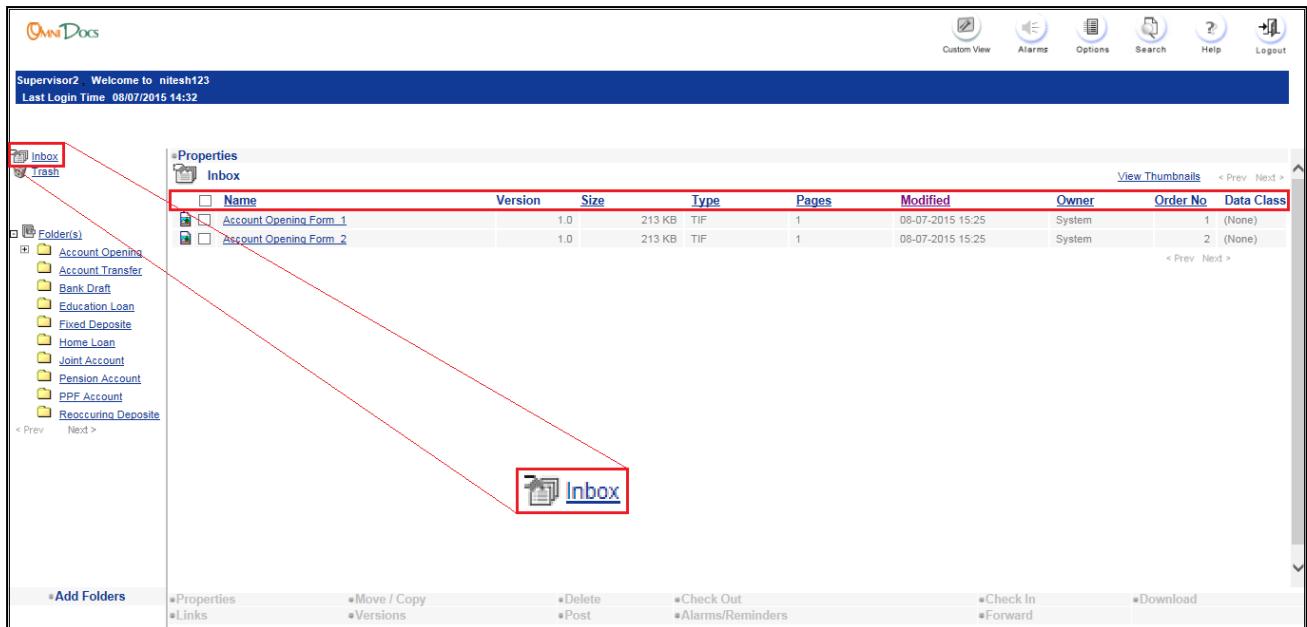


Figure: 2.40

2.3.6 Folder Properties

To view a folder's properties:

1. Select a folder on the left pane of the main screen.
2. Click the **Properties** link on the folder Information screen of the MasterDesktop.

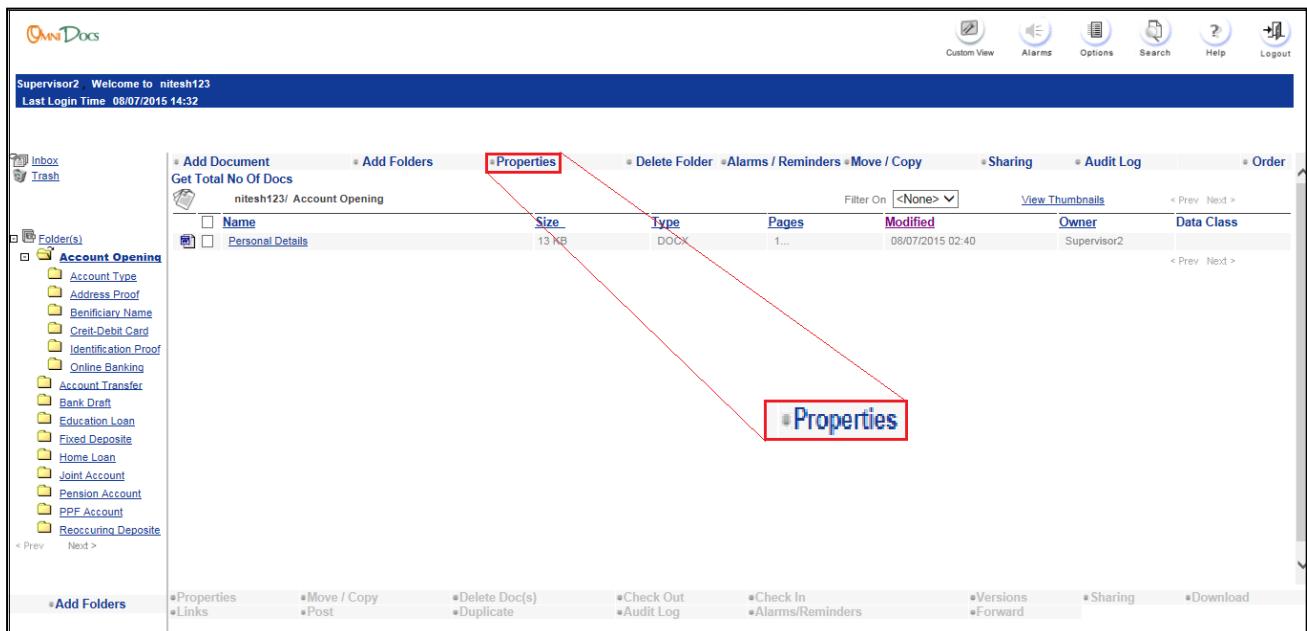


Figure: 2.41

OR

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Move the mouse pointer to an option icon; on the Repository bar in OmniDocs WebDesktop. Click **Properties** link.

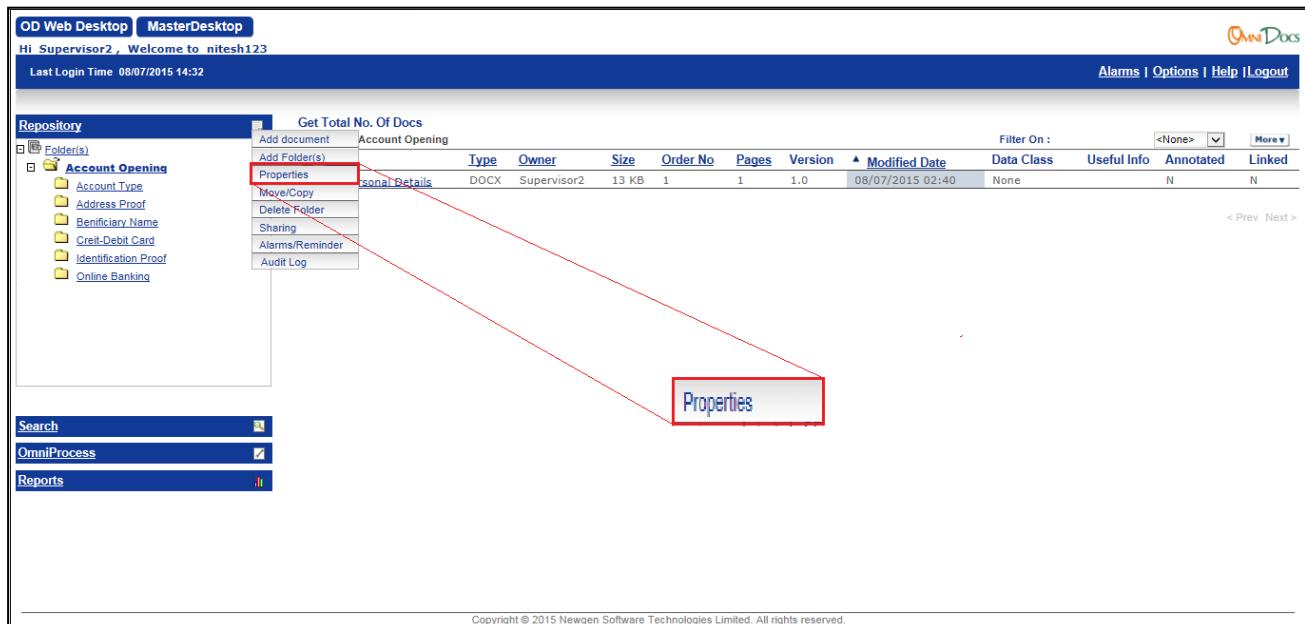


Figure: 2.42

3. The Folder properties screen appears. The Folder properties screen consists of two tabs – **General** and **Data Class**. By default 'General' tab appears selected.

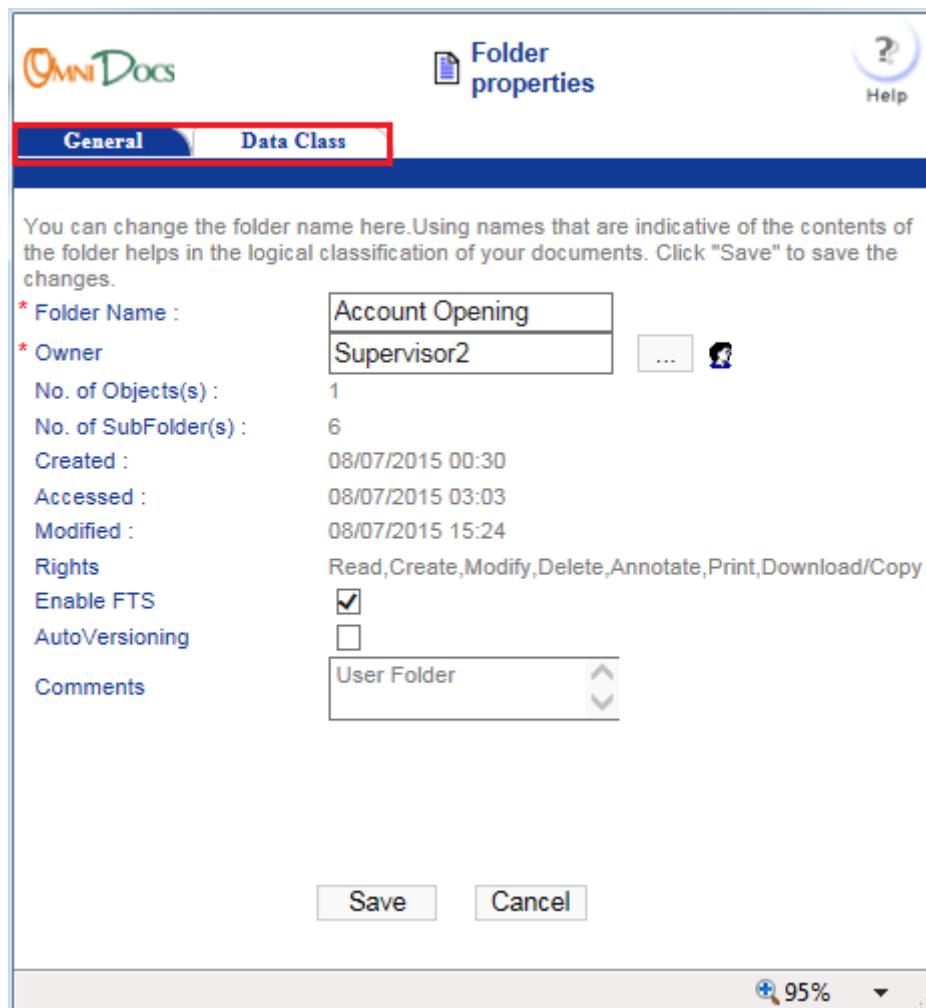


Figure: 2.43

4. The General tab page displays the, Folder Name, Owner, No. of Objects, No. of SubFolders, Created, Accessed, Modified, Rights, Enable FTS, Auto-Versioning and Comments.
5. The user can modify the name of the **folder** or the name of the **owner** or both, in the General Tab page.

To modify Folder Name:

1. Open the **General** Tab in the "Folder properties" screen and type the new name in **Folder Name** text box.
2. Click the Save command button or continue with modifying the owner of the folder.

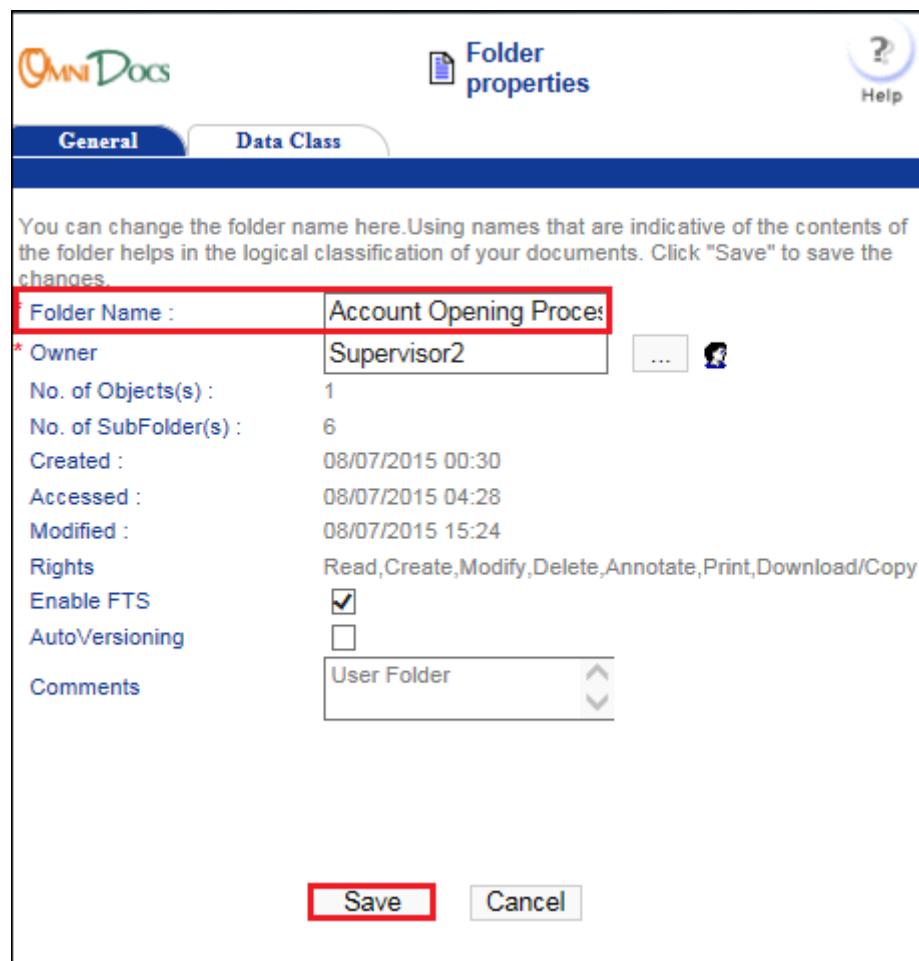


Figure: 2.44

Modify owner of a folder:

1. Click the **Owner ellipses** button.

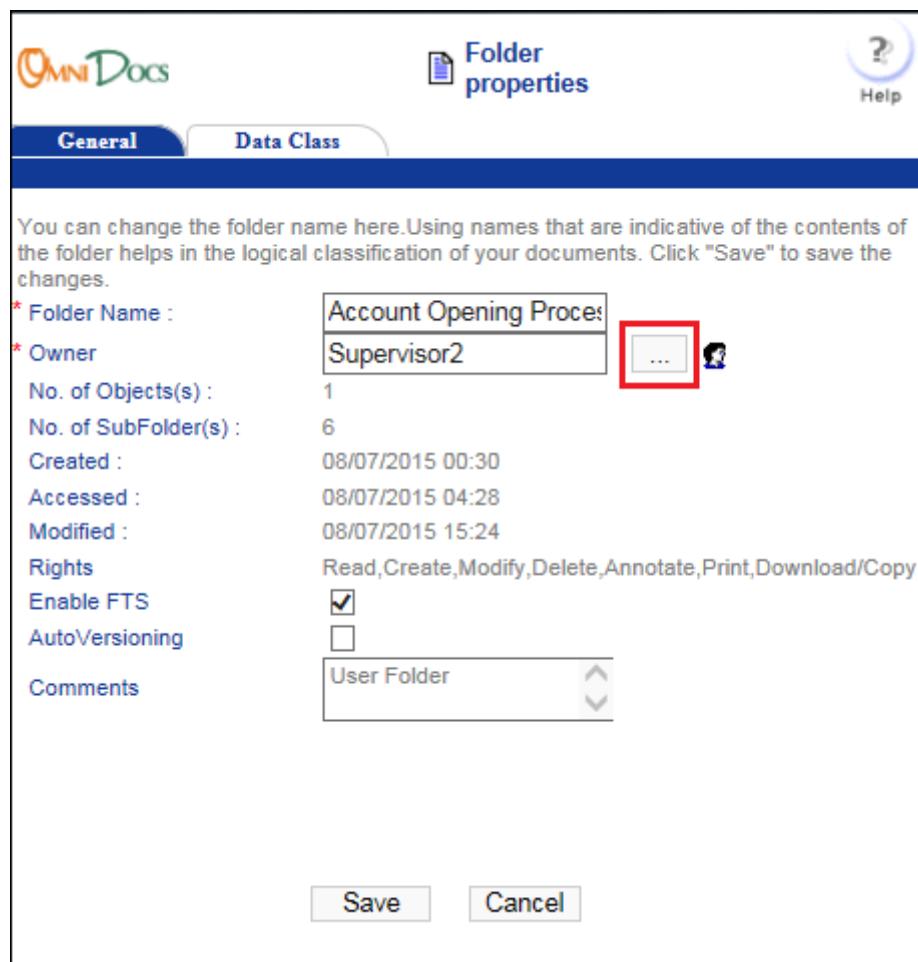


Figure: 2.45

2. Choose **new owner** of the selected folder from the window shown in **Figure: 2.46**.

Click **Done** button, the selected owner name will get displayed in the Owner text box.

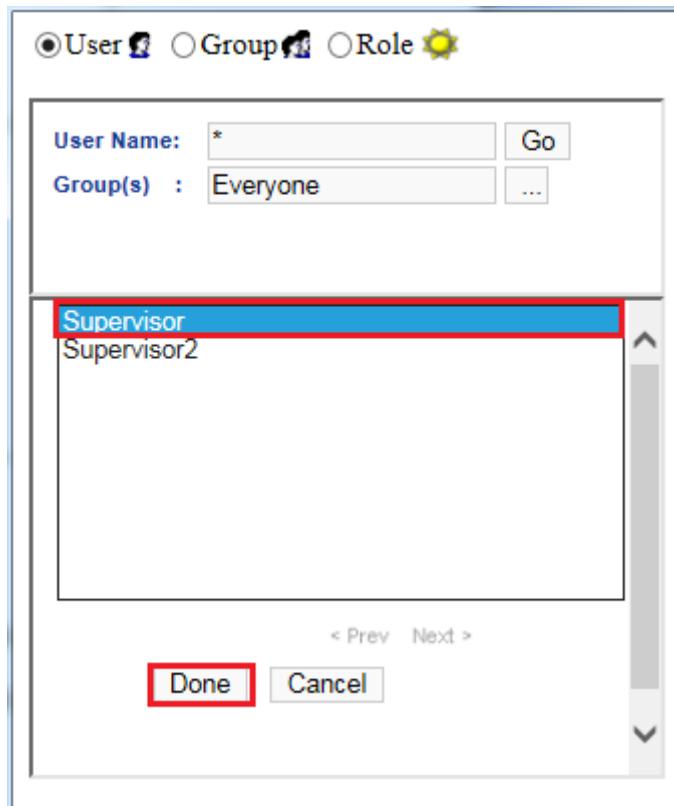


Figure: 2.46

NOTE:

- The name of the folder can only be changed by its **Owner** or the **Supervisor**.
 - By default, the owner of the newly created folder will be the one who created it.
-

3. Comments can be associated with the folders, specify the comments in the **Comments** textbox.
4. Select the **Enable FTS** option for performing a Full Text Search on the selected folder.

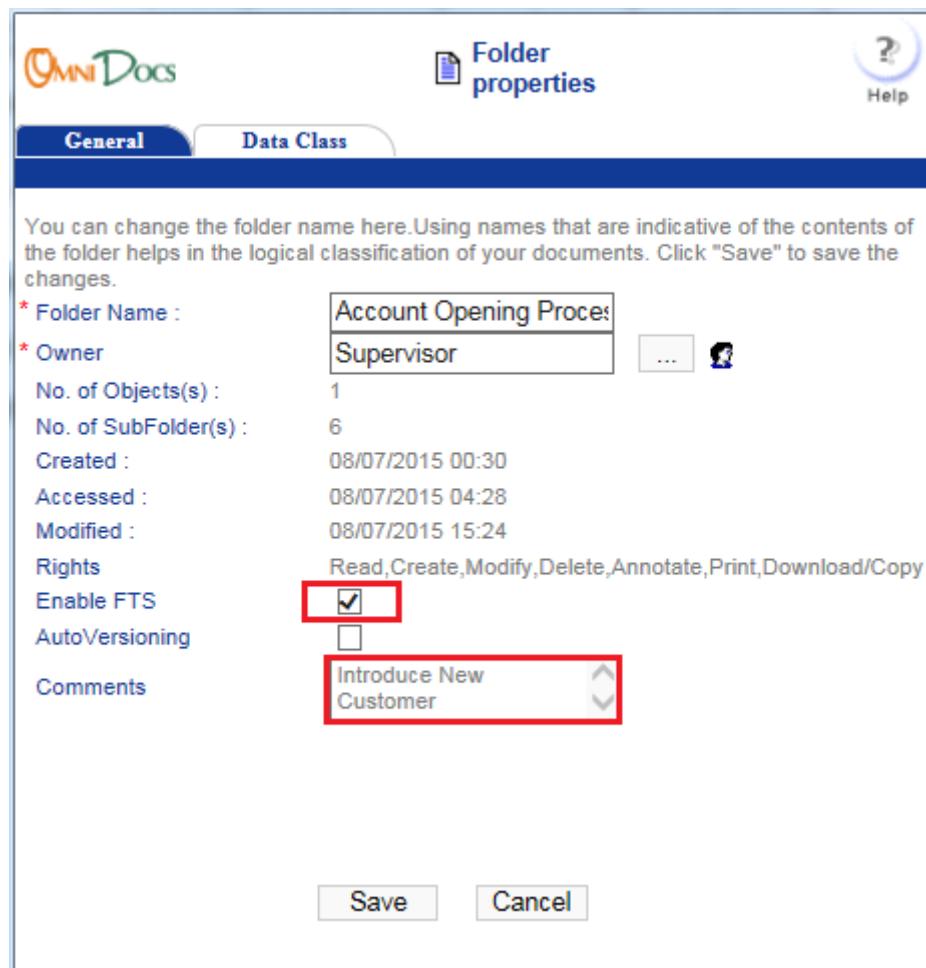


Figure: 2.47

NOTE:

- A maximum of **255 characters** can be entered to write comments
 - At the time of creation of a folder, the **Enable FTS** option by default remains selected.
 - The Enable FTS option is applicable to **folders** as well as **documents**.
-

5. Click **Save** button to save the changes made or click **Cancel** at any stage to exit from the "Folder properties" screen without saving the changes made.

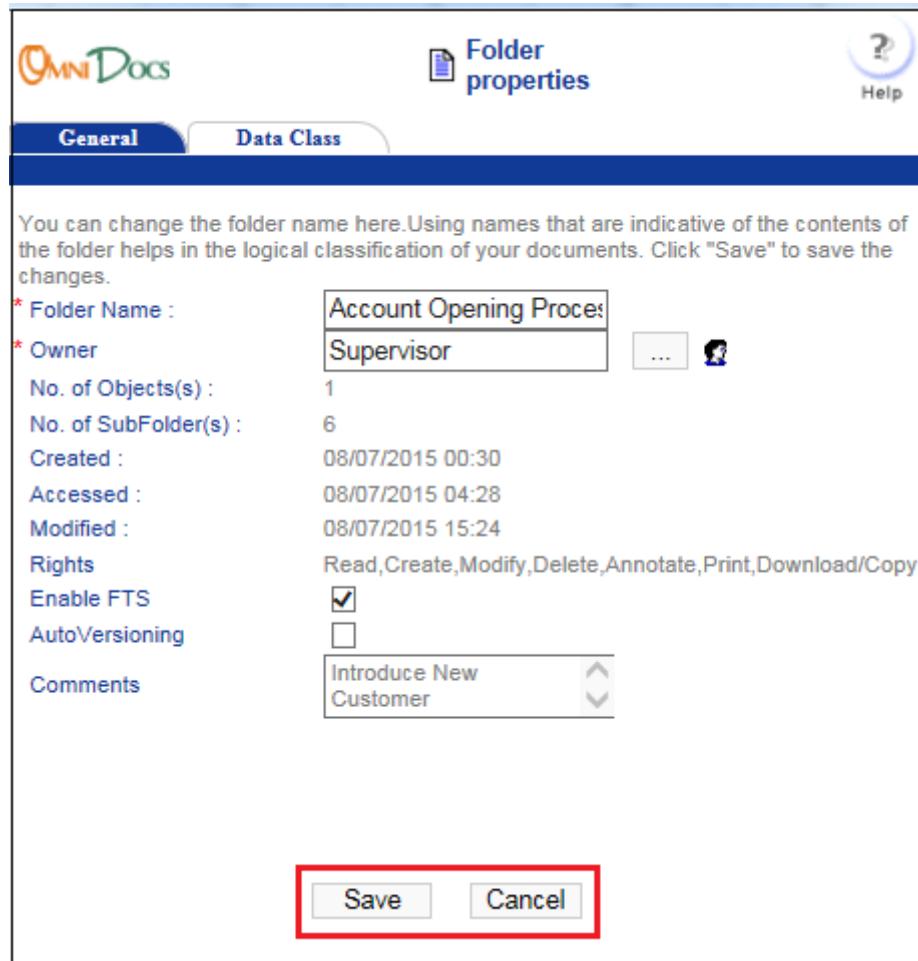


Figure: 2.48

6. To view the associated data class, click **Data Class** tab on the Folder properties screen.

The associated 'Data Class' appears along with its **index** and **index values**.

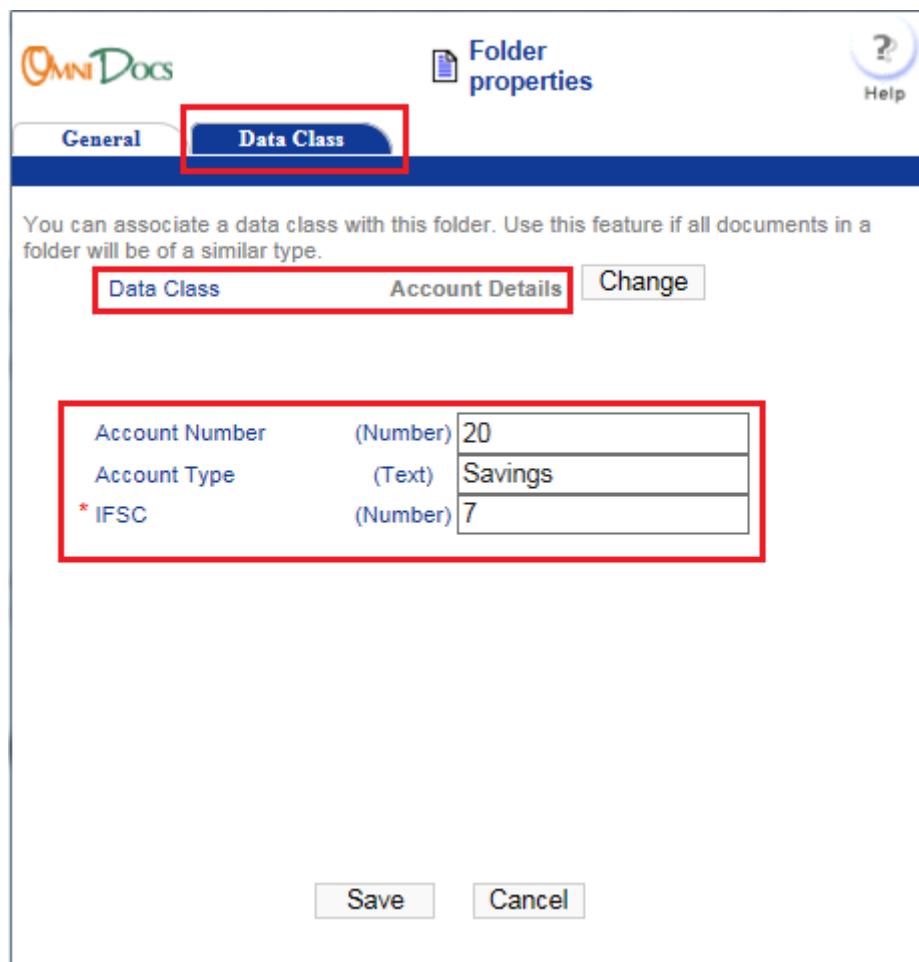


Figure: 2.49

Modify existing Data Class:

1. Click **Change** button on the 'Data Class' tab screen of the 'Folder properties' window.

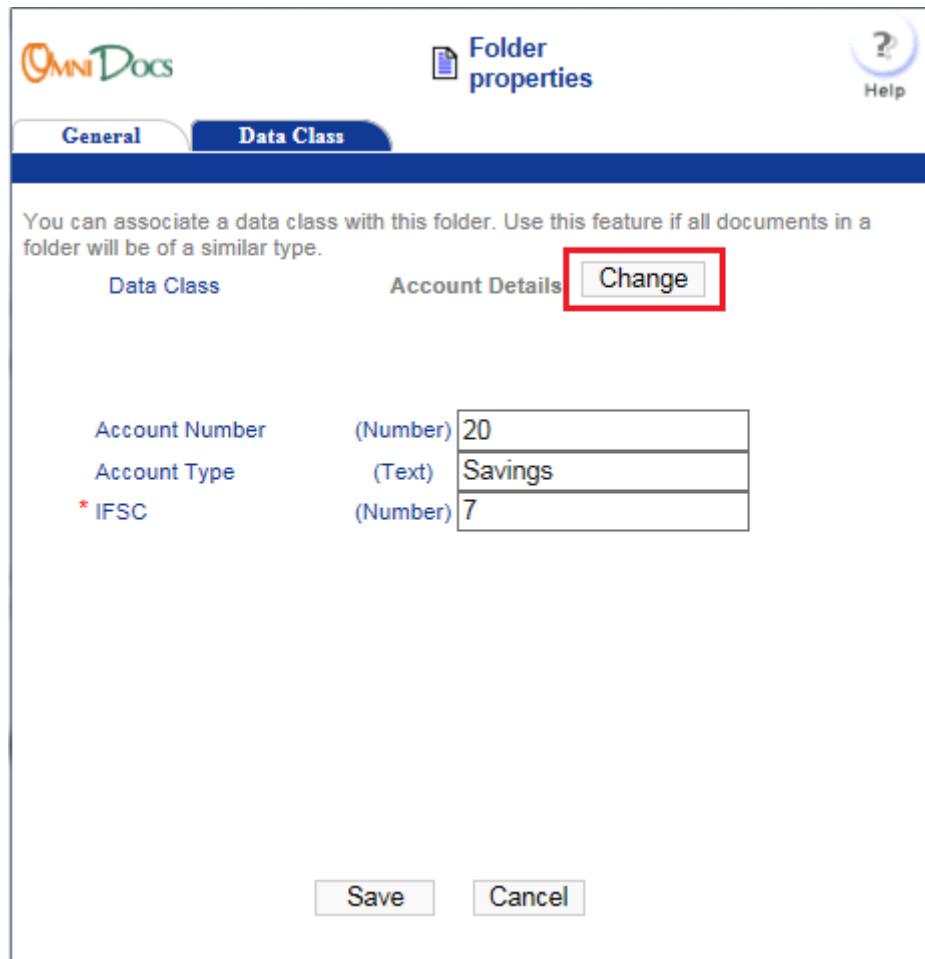


Figure: 2.50

2. The **Pick Data Class** screen displaying the registered data class list appears.
3. Select a **Data Class** from the data class list.
4. Click **Ok** to save the changes and or click **Cancel** to exit from the "Pick Data Class" screen without saving the changes made.

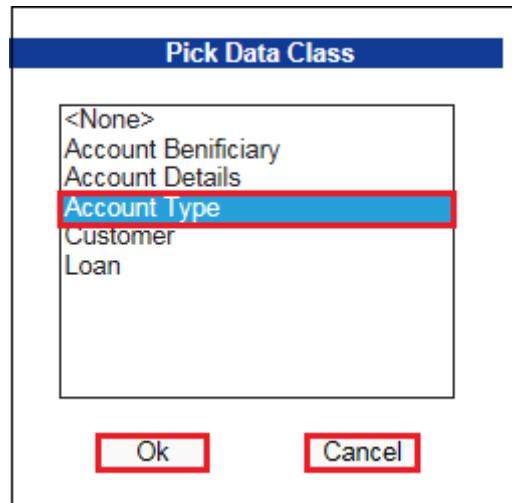


Figure: 2.51

Modify Index Field Values

1. Select a specific "Index field" that needs to be modified.
2. Enter the desired value in the selected index field textbox.
3. Click **Save** button.

The screenshot shows the "Folder properties" dialog for "Folder properties". The "Data Class" tab is selected. A message at the top states: "You can associate a data class with this folder. Use this feature if all documents in a folder will be of a similar type." Below this, there are three index fields:

Account Number	(Number)	20
Account Type	(Text)	Current
* IFSC	(Number)	7

The "Account Type" field is highlighted with a red border. At the bottom of the dialog are "Save" and "Cancel" buttons, with "Save" also highlighted with a red border.

Figure: 2.52

NOTE:

The icon of the folder changes to , after data class is attached with the folder.

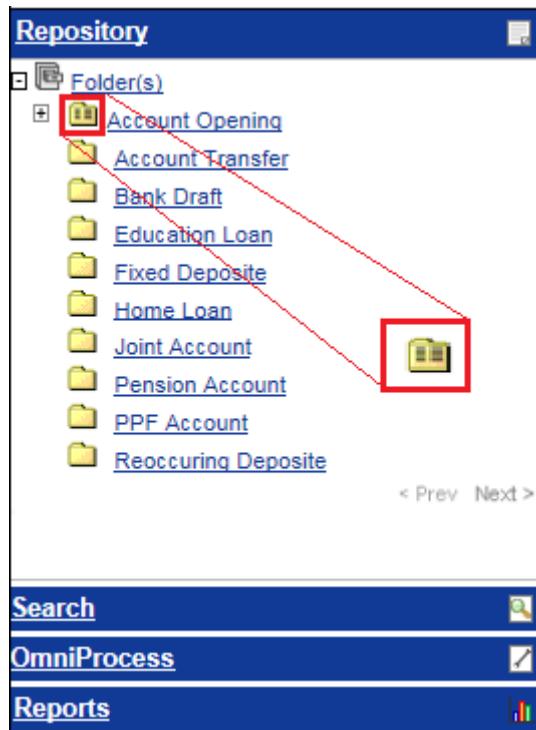


Figure: 2.53

2.3.7 Folder Sharing

To share a folder, follow the below steps:

1. Select a folder on the left pane of the main screen.
2. Click the **Sharing** link on the folder Information screen of the MasterDesktop.

Working with OmniDocs

This screenshot shows the OmniDocs WebDesktop interface. At the top, there's a navigation bar with links for Custom View, Alarms, Options, Search, Help, and Logout. Below the header, a banner displays the user information: Supervisor2, Welcome to nitesh123, Last Login Time 09/07/2015 12:32, Last Login Failure Time 09/07/2015 14:35, and Failure Attempt Count 1. The main content area features a sidebar on the left with links for Inbox, Trash, Folder(s), and Account Opening (which is currently selected). The central area displays a list of documents under 'nitesh123/ Account Opening'. A red box highlights the 'Sharing' link in the top right corner of the toolbar above the list. The list includes items like 'Personal Details' (DOCX, 13 KB) and 'Photo ID' (JPG, 311 KB). The bottom of the screen has a footer with various navigation links.

Figure: 2.54

OR

Move the mouse pointer to an option icon; on the Repository bar in OmniDocs WebDesktop. Click **Sharing** link.

This screenshot shows the OmniDocs WebDesktop interface. At the top, there's a navigation bar with links for OD Web Desktop, MasterDesktop, Alarms, Options, Help, and Logout. Below the header, a banner displays the user information: Hi Supervisor2, Welcome to nitesh123, Last Login Time 09/07/2015 14:35, Last Login Failure Time 09/07/2015 15:37, and Failure Attempt Count 1. The main content area features a sidebar on the left with links for Repository, Search, OmniProcess, and Reports. The central area displays a list of documents under 'Account Opening'. A red box highlights the 'Sharing' link in the Repository bar. The list includes items like 'Personal Details' (DOCX, 13 KB) and 'Photo ID' (JPG, 311 KB). The bottom of the screen has a footer with various navigation links.

Figure: 2.55

3. **Folder Sharing** screen appears. By default, **Inherited** selection button appears selected.
4. Click **Shared** selection button.

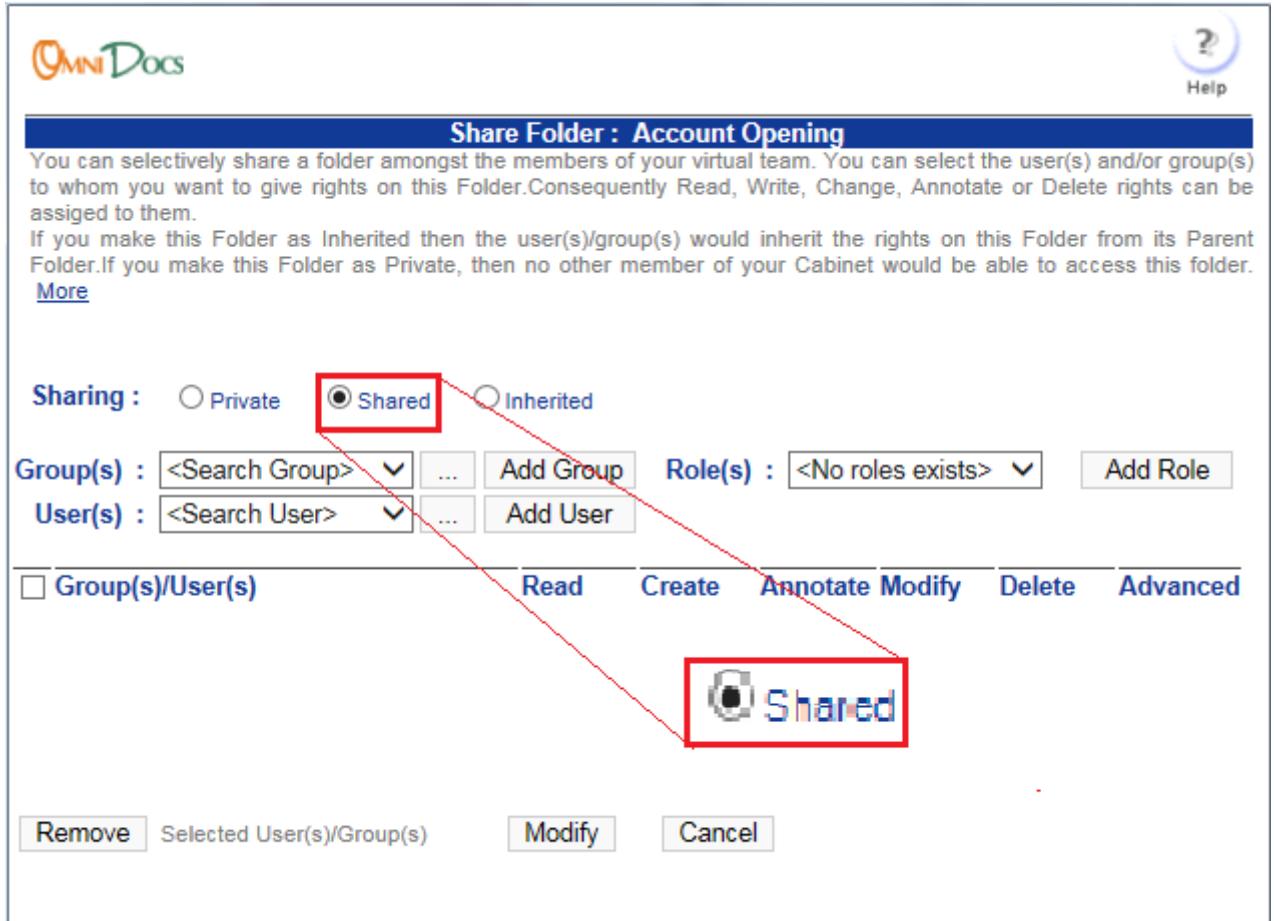


Figure: 2.56

5. For sharing a folder with the specific group(s) click **Group(s)** ellipsis button .

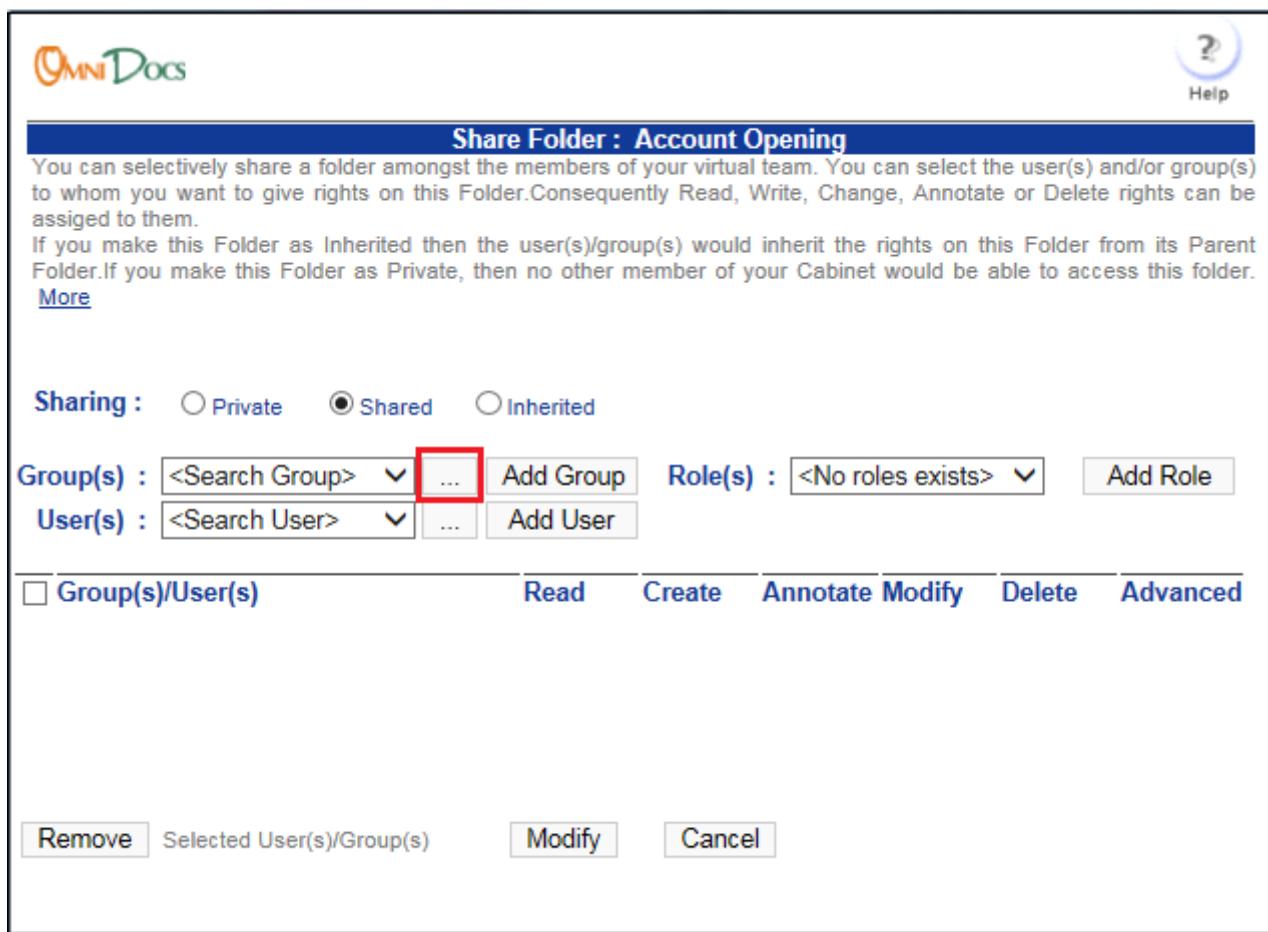


Figure: 2.57

6. The **Search Group** window appears.
7. In Group(s) text box, type the desired group name to which the folder is being shared.
8. Click **Go** button. The searched group(s) gets filtered in the **Group List** box.

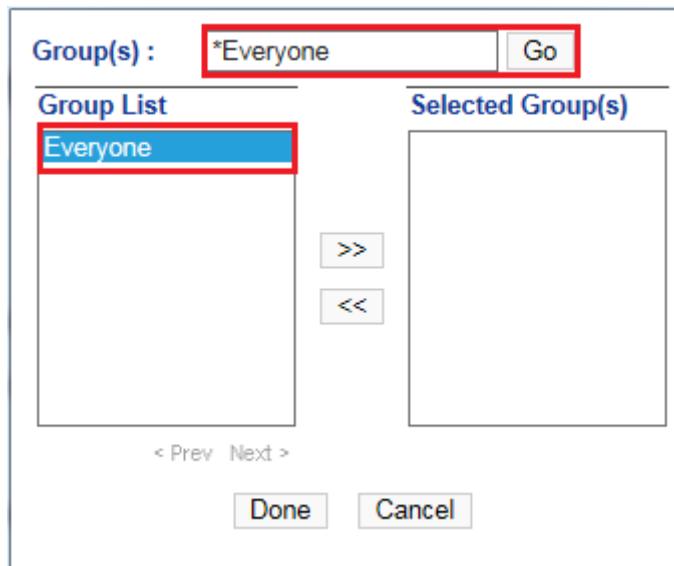


Figure: 2.58

9. Click **>>** button to add the searched group to the Selected Group(s) list box.
10. Click **Done**, the selected group(s) will display under **Group(s)** textbox in **Share Folder** screen.

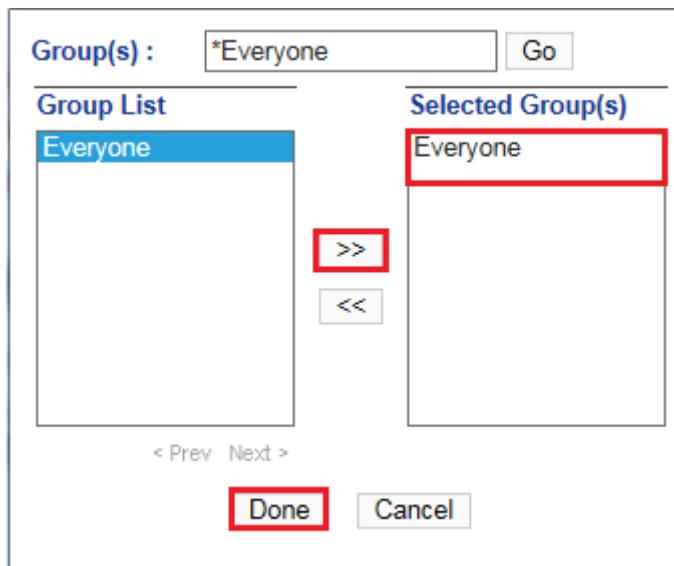


Figure: 2.59

11. Now select group(s) from the **Group(s)** drop-down box.
12. Click **Add Group** button to define the group(s) to which you want to assign the sharing.

13. The added group appears under the **Group(s)/User(s)** column.

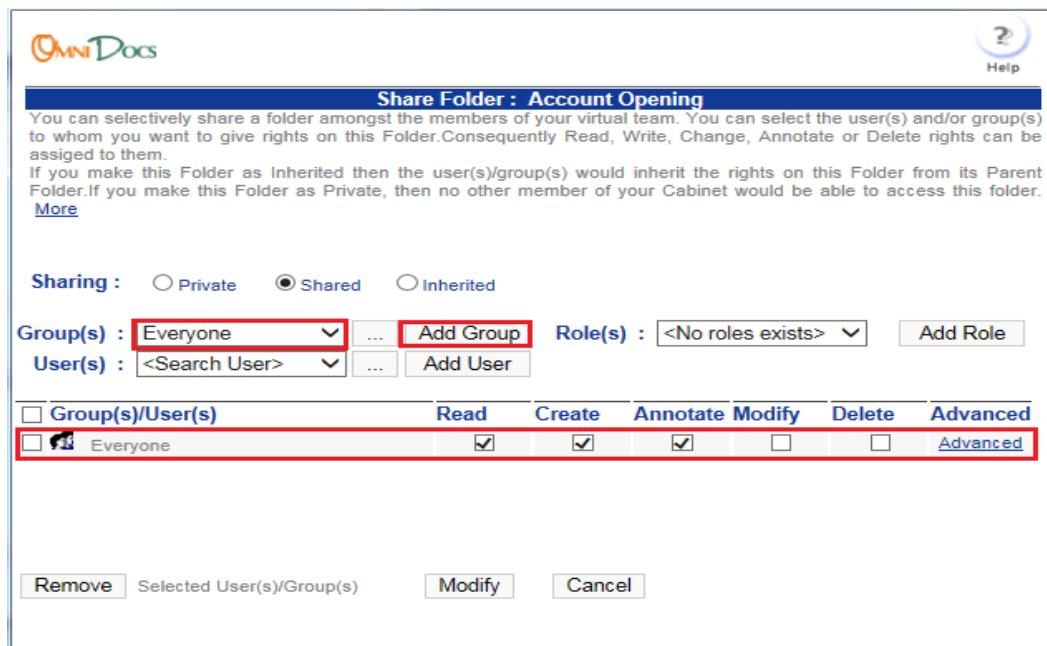


Figure: 2.60

14. Similarly, for sharing a folder with the specific user(s) click **User(s).ellipsis button** and add the desired user(s) in the **Group(s)/User(s)** column. {Steps – Same as for [adding Group\(s\)](#)}

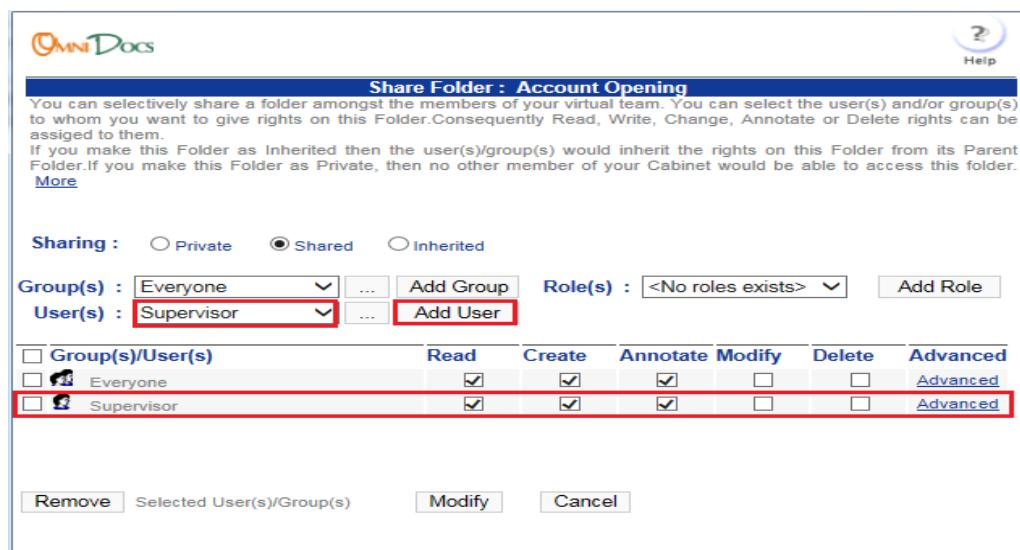


Figure: 2.61

15. By **default** the folders have inherited rights, but you can change the rights assigned to folders from Inherited to **Private** or **Shared**.
16. As per your need, assign necessary rights to the selected Groups or Users in the **Group(s)/User(s)** list.

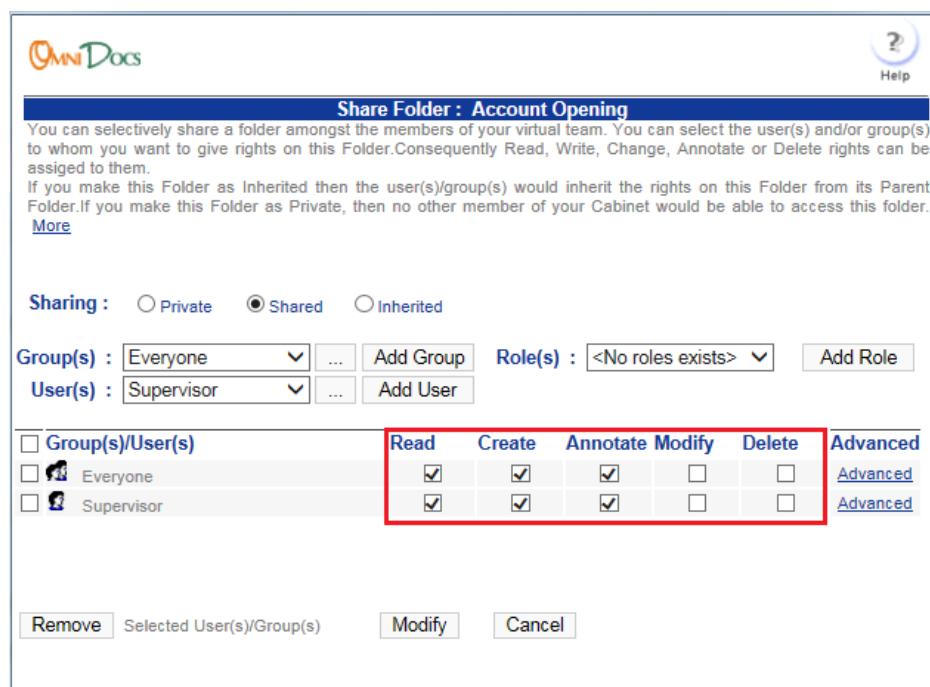


Figure: 2.62

17. Click the **Advanced** link to assign advance-sharing rights to the user(s)/ (groups).

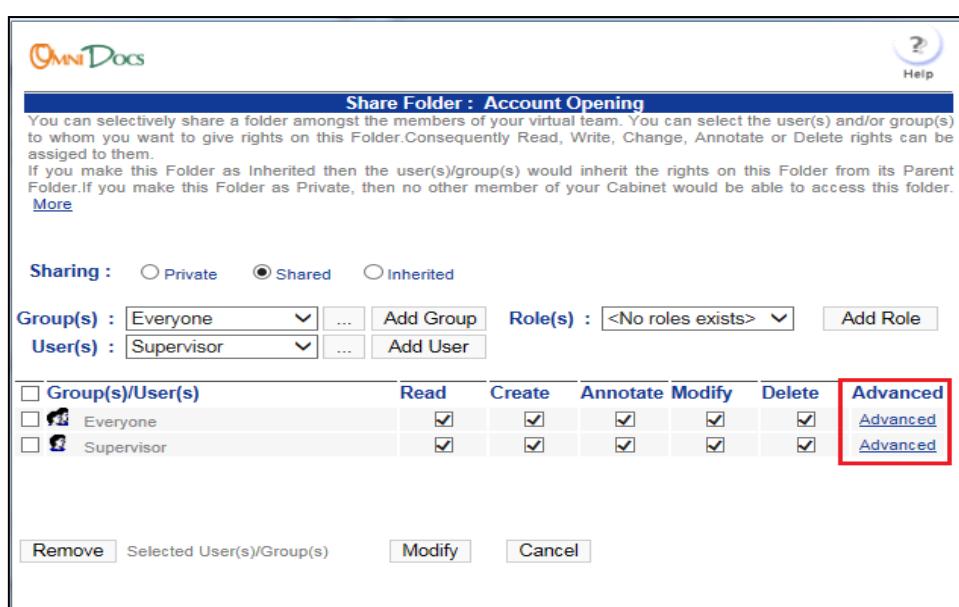


Figure: 2.63

18. Assign **Print** and **Copy** rights to the user(s)/groups(s).

19. Click the **Save** button to save the sharing rights on the folder, else click **Cancel**.

NOTE:

In order to download documents of a shared folder, it is mandatory for a user(s)/groups(s) to have both **Print** as well as **Copy** rights.

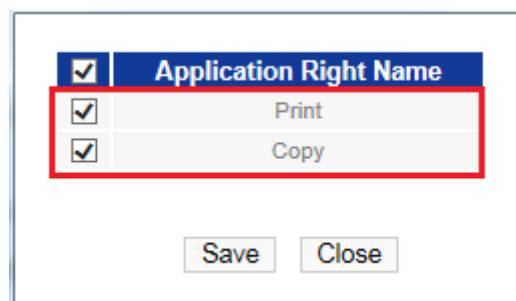


Figure: 2.64

20. Select the Group(s)/User(s) that you need to delete from the **Group(s)/User(s)** list and click the **Remove** command button.

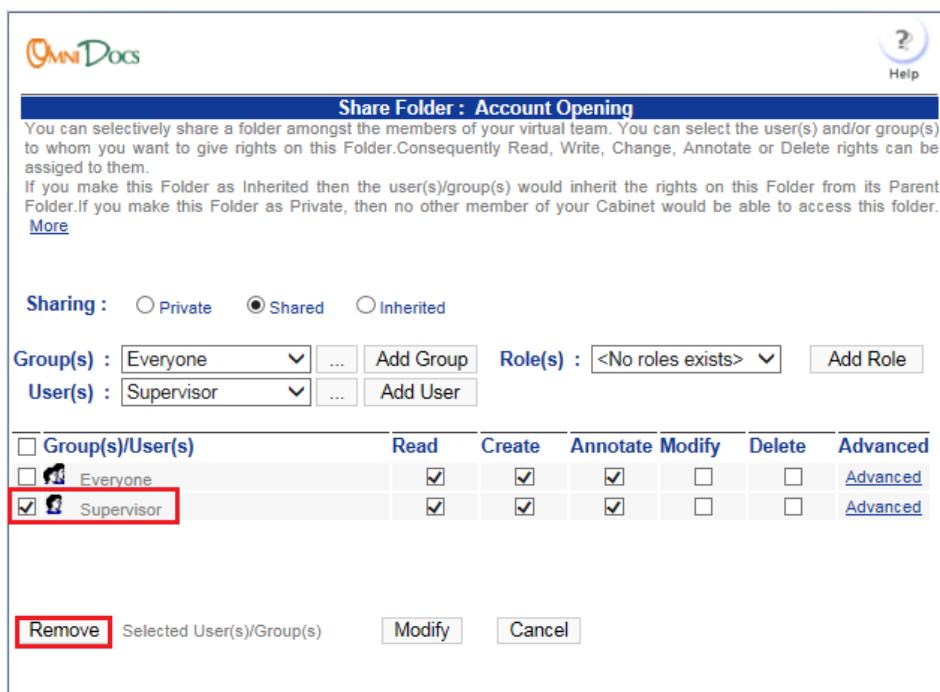


Figure: 2.65

21. Click the **Modify** button to save the changes made else click the **Cancel** button to exit from the "Share Folder" screen at any stage without saving the changes.

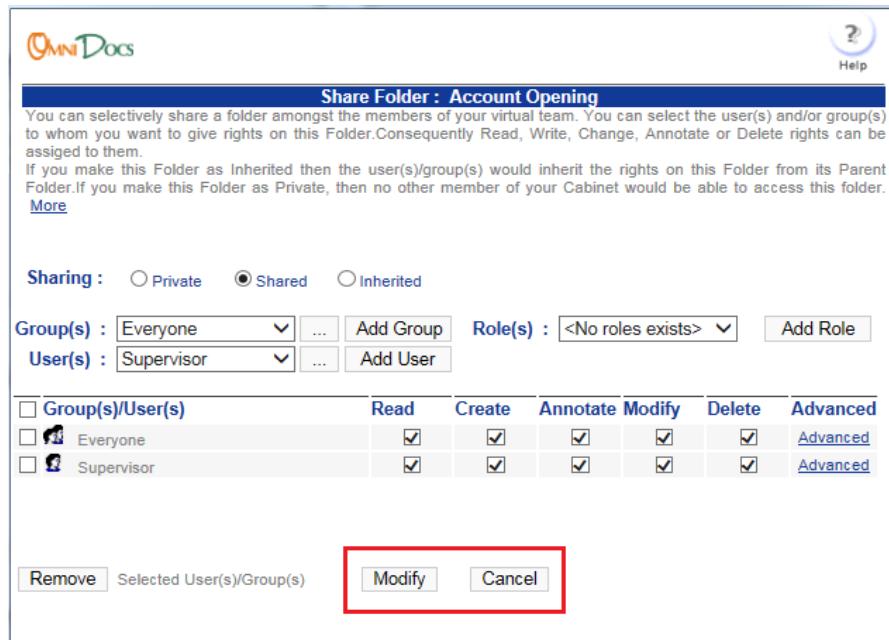


Figure: 2.66

2.3.8 Folder Search

2.3.8.1 Folder Search in MasterDesktop

1. Click the **Search** icon in the tool bar of **MasterDesktop** main screen.

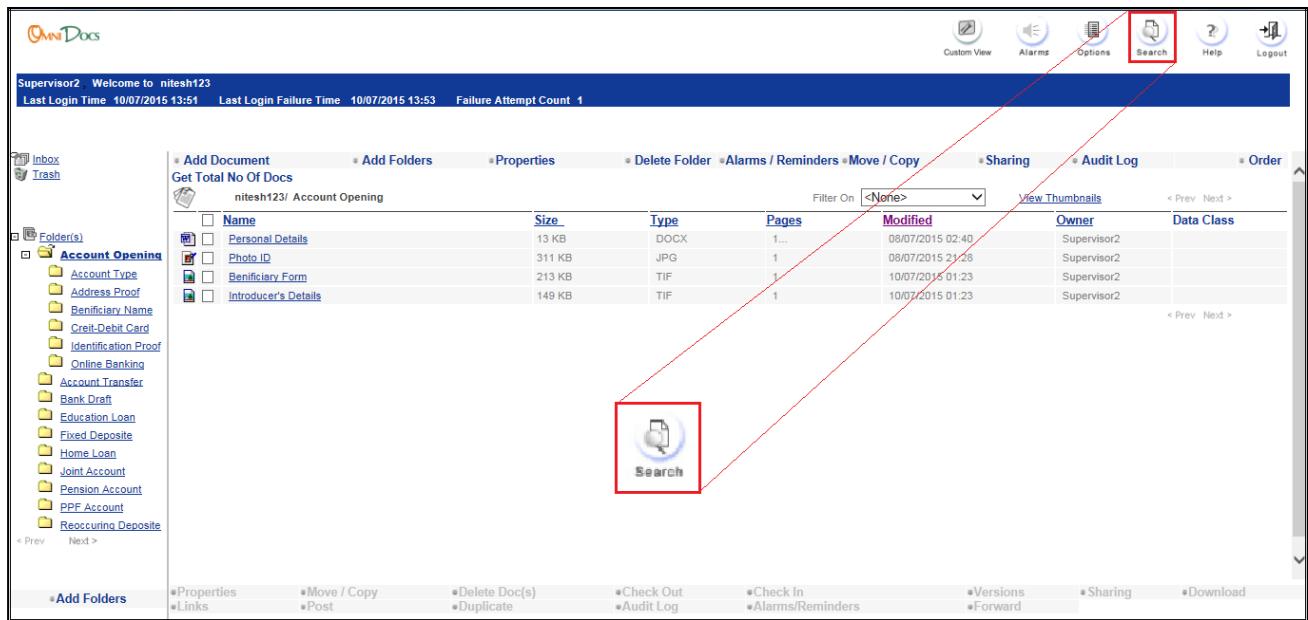


Figure: 2.67

2. The **Search** screen showing two tabs: **Document** and **Folder** appears. By default "Document" tab appears selected.

Working with OmniDocs

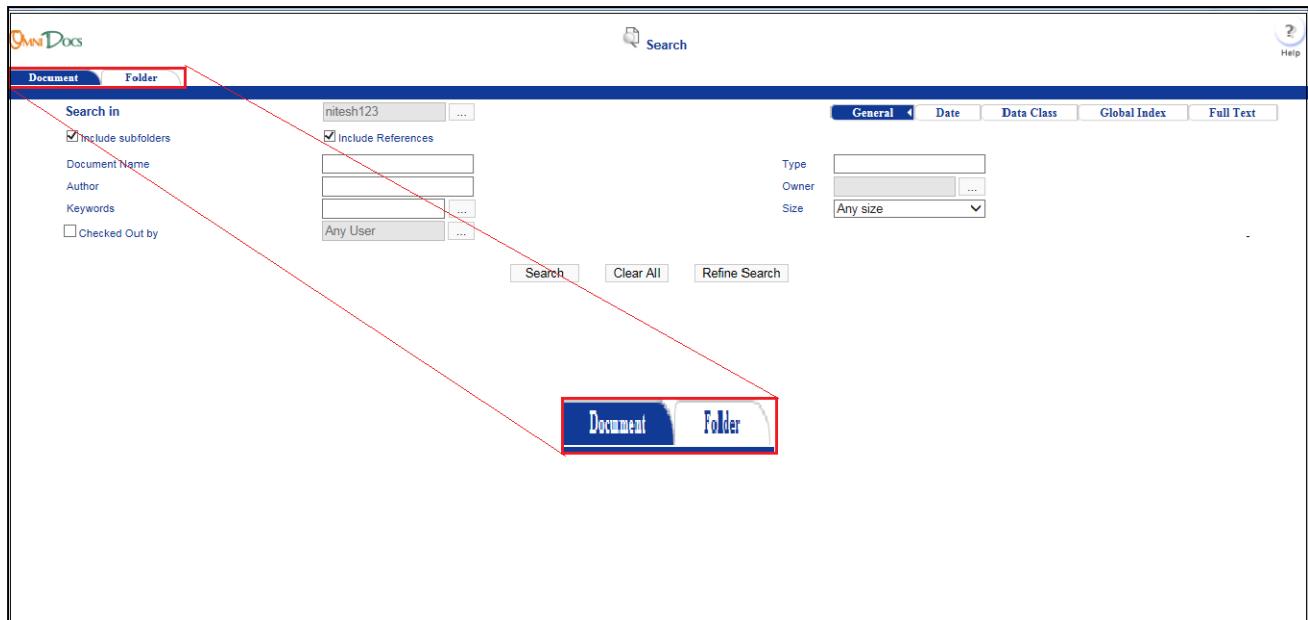


Figure: 2.68

3. Click the **Folder** tab. the "Folder" tab screen comes into view.
4. The "Folder" tab contains three tabs: **General**, **Date** and **Data Class**. By default "General" tab appears selected.

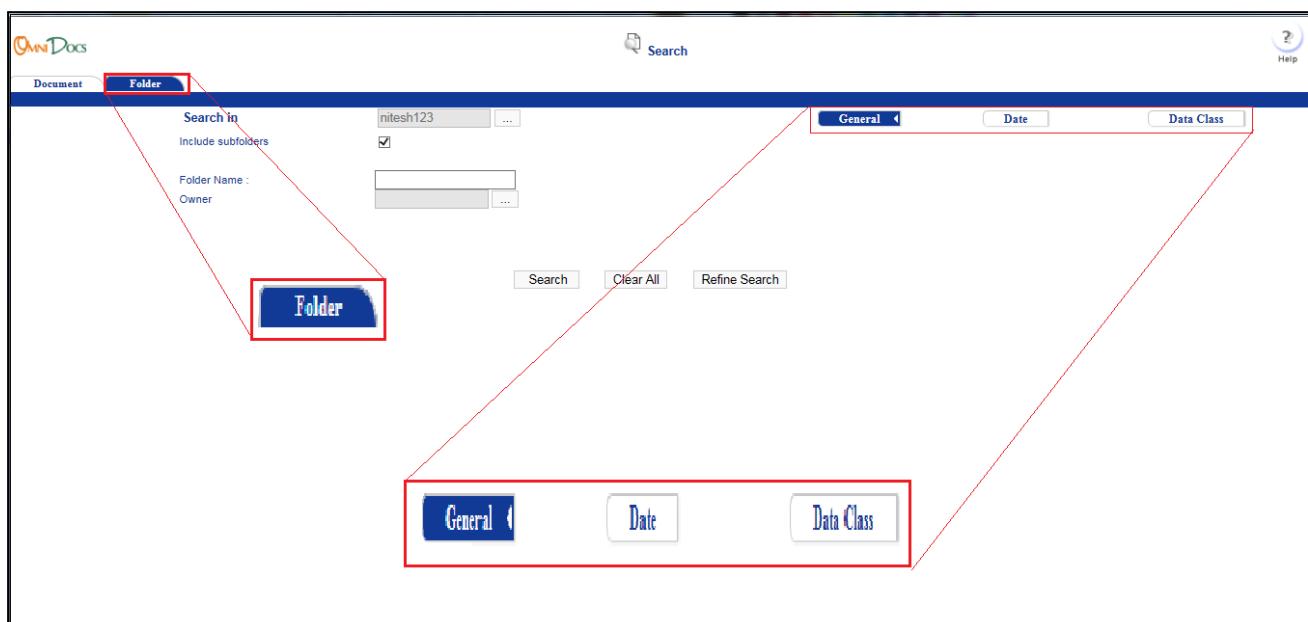


Figure: 2.69

5. Click the ellipsis button  beside the **Search in** list box to view the list of folders present in the logged-in Cabinet.

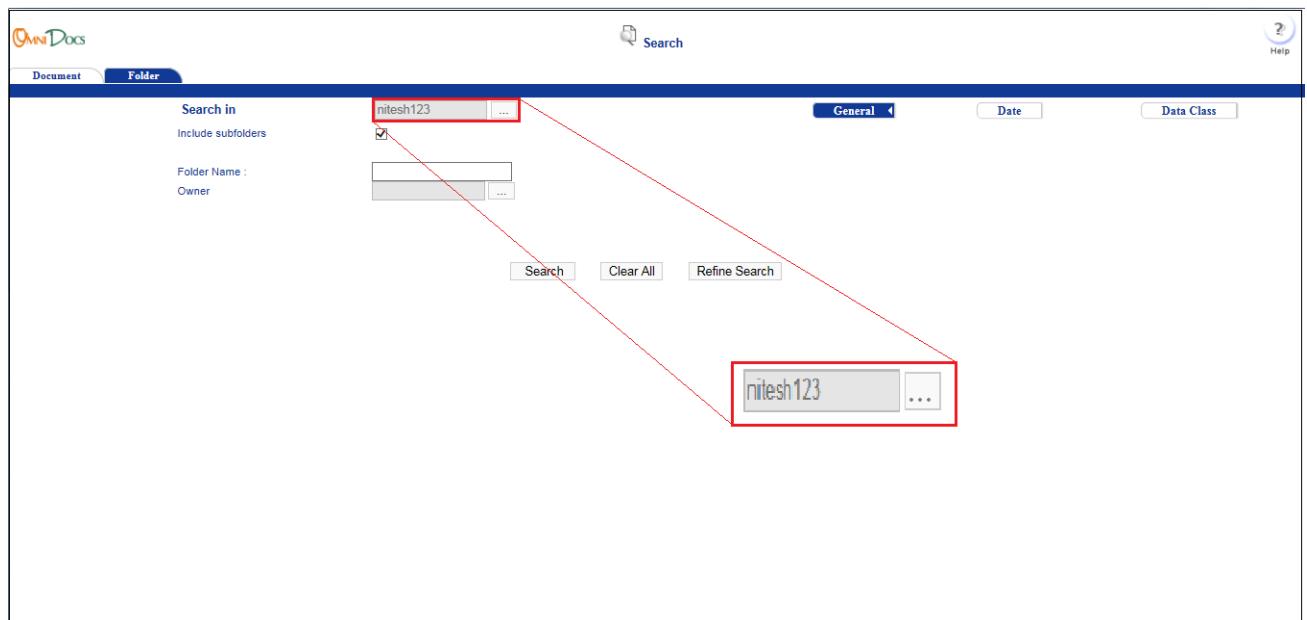


Figure: 2.70

6. **Select Folder** window pop-ups. Select a folder from the "Select Folder" window on which you need to perform a search. Click **OK**.

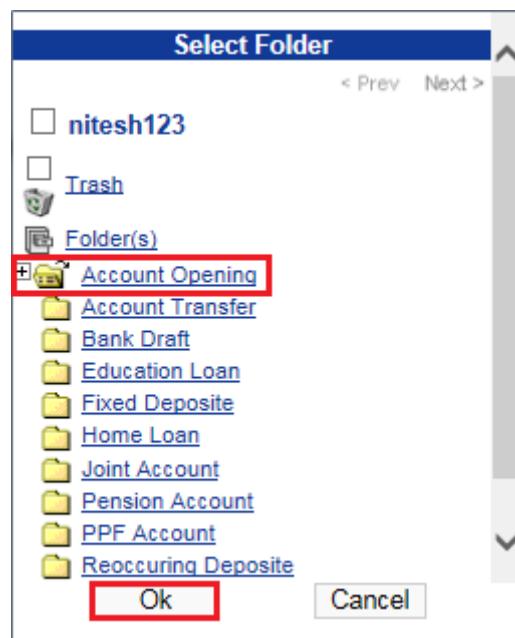


Figure: 2.71

7. The selected folder appears in the **Search in** textbox. To perform a search on the subfolders within the folder, check-in the **Include Subfolders** check-box.

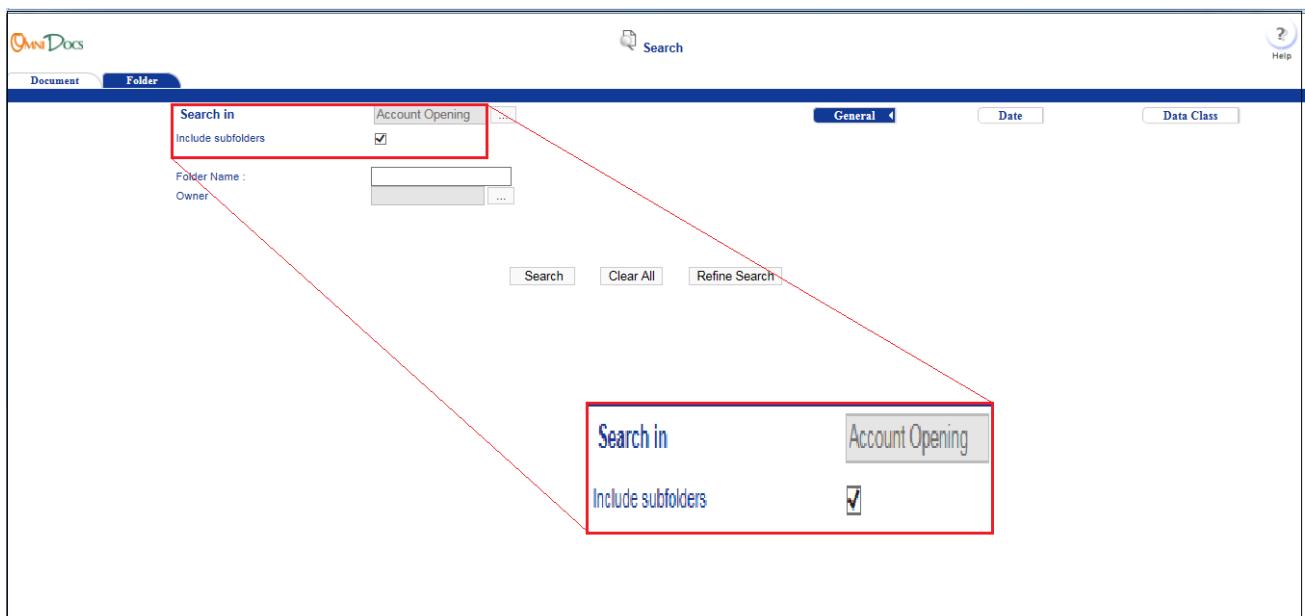


Figure: 2.72

NOTE:

The user can search a folder at **Cabinet** and **Trash** levels.

- To perform cabinet level search, check-in the "cabinet name" checkbox.
 - To perform folder search on trash, check-in the "Trash" checkbox.
-

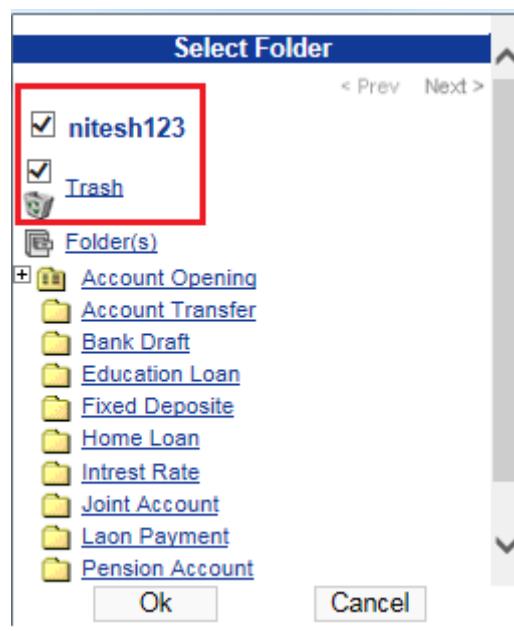


Figure: 2.73

I. General Search:

1. Click the **General** label of the **Folder** tab in the "Search" screen. The "General" tab screen appears.
2. Type the folder's name in the **Folder Name** text box.

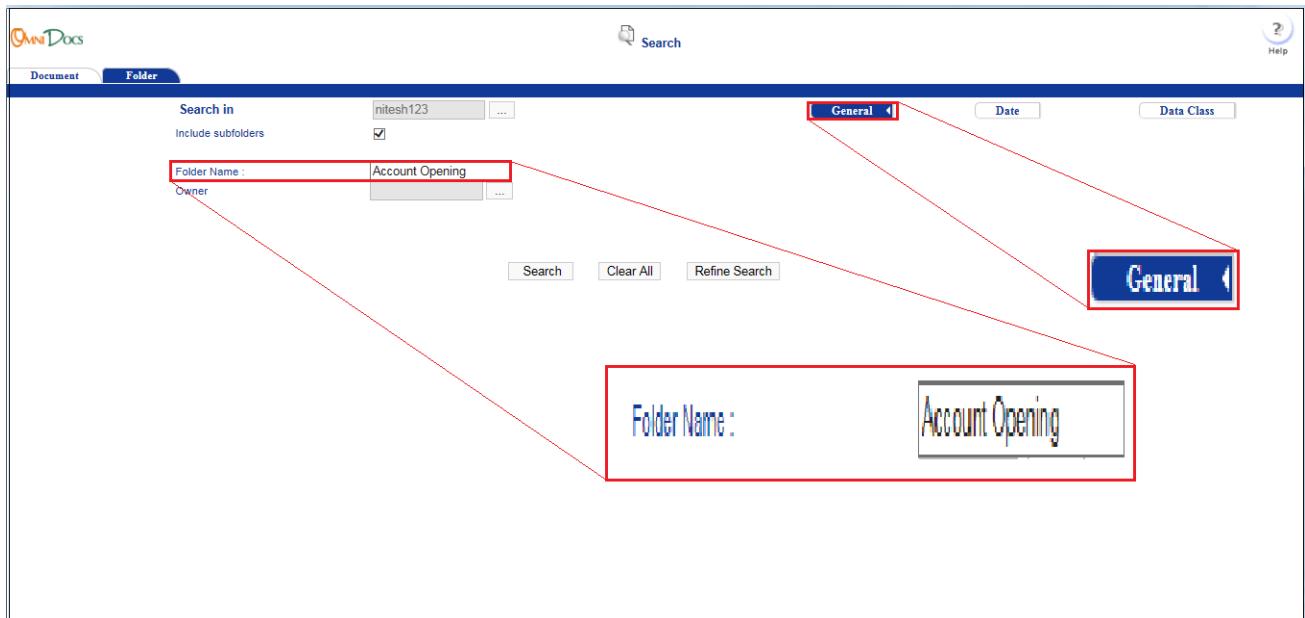


Figure: 2.74

NOTE:

The user can also type **wild cards** instead of an entire folder name.

For example, if the user wants to search for the folder, named - "**Advertisement**" then the user can type a wild card such as **Adver*** instead of an entire folder name.

3. Click the ellipsis button beside the **Owner** textbox, the **Select User** window pop-ups.
4. Select user name for the folder for which you need to perform a search, Click **Done**.

Working with OmniDocs

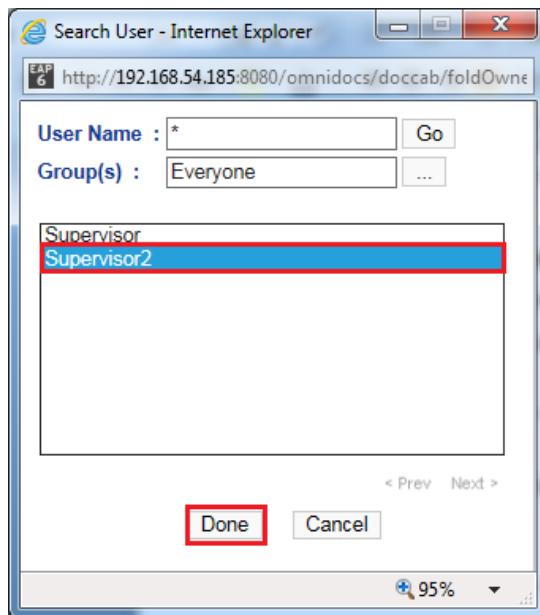


Figure: 2.75

5. The selected owner gets displayed in the **Owner** textbox.

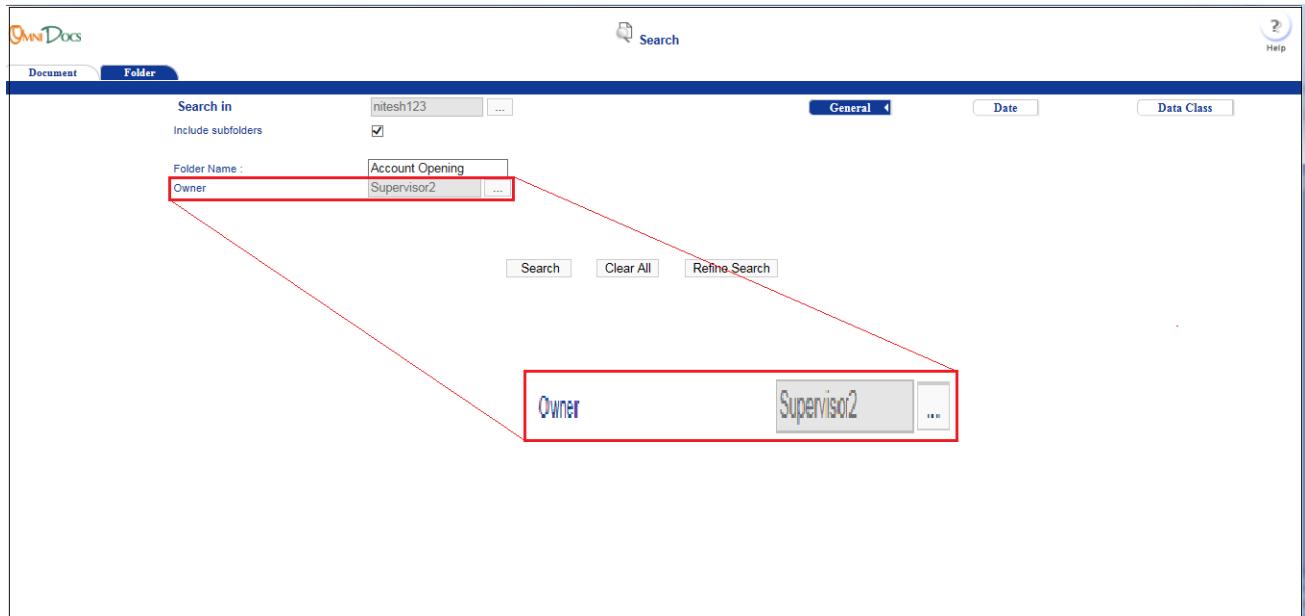


Figure: 2.76

6. Click the **Search** command button. If the folder for which you perform a search exists, then the **Folder Search Results** pane appears, displaying the searched folder and its information.

Working with OmniDocs

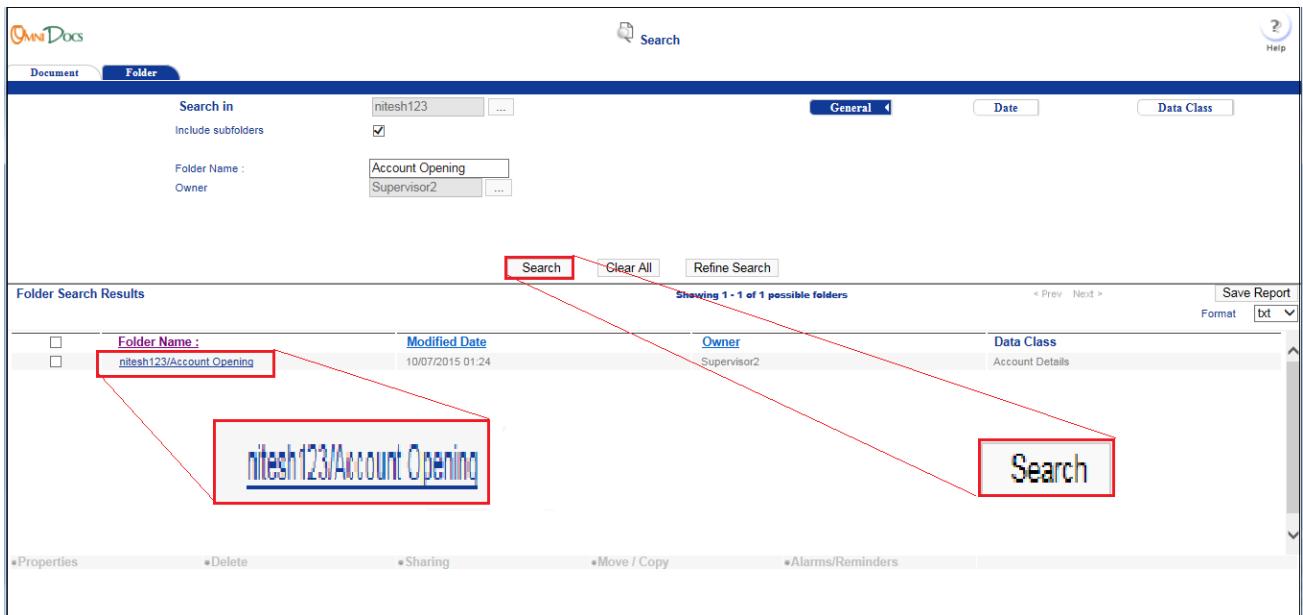


Figure: 2.77

7. If the folder for which you performed a search does not exist, then a message “**No Folder(s) found for this Query**” appears on the **Folder Search Result** pane.

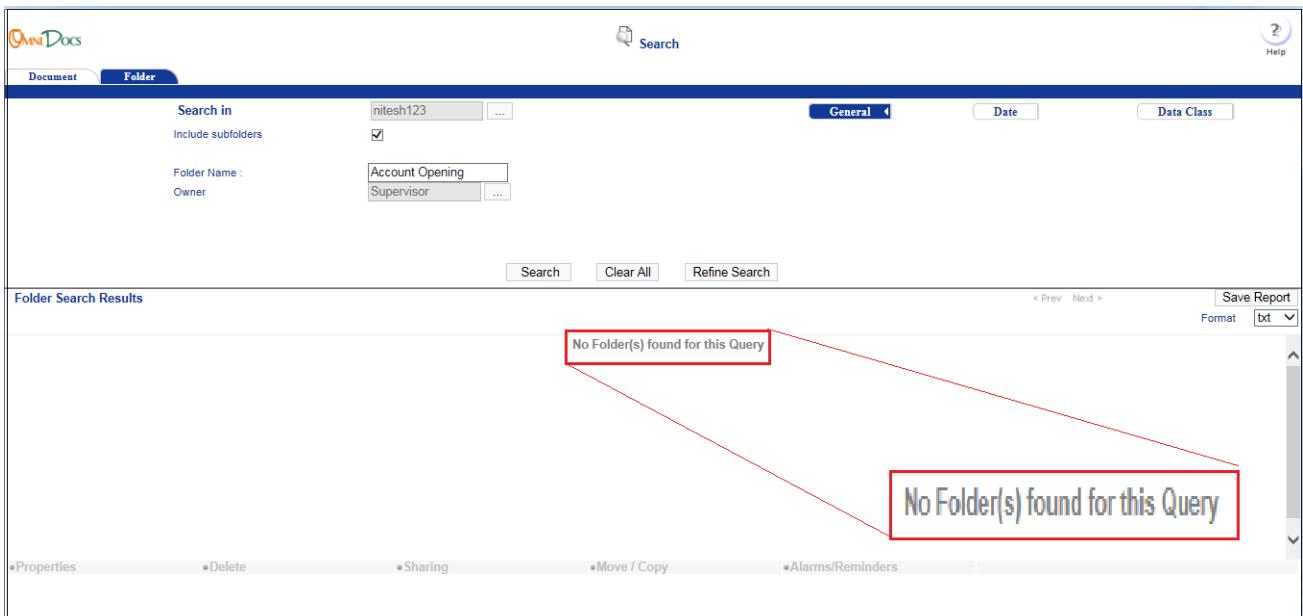


Figure: 2.78

8. If you typed the wild card instead of the entire name of a folder, then a list of folders with same wild card is shown in batches on the **Folder Search Result** pane.
9. You may click the **Next** or the **Previous** link to view the next or preceding batch of the folders respectively.

Folder Name :	Modified Date	Owner	Data Class
nitesh123/Account Opening	10/07/2015 01:24	Supervisor2	Account Details
nitesh123/Account Transfer	08/07/2015 00:30	Supervisor2	<None>
nitesh123/Account Opening/Account Type	08/07/2015 02:04	Supervisor2	<None>
nitesh123/Account Opening/Address Proof	08/07/2015 02:04	Supervisor2	<None>
nitesh123/Bank Draft	08/07/2015 02:48	Supervisor2	<None>
nitesh123/Account Opening/Beneficiary Name	08/07/2015 02:04	Supervisor2	<None>
nitesh123/Account Opening/Credit-Debit Card	08/07/2015 02:04	Supervisor2	<None>
nitesh123/Education Loan	08/07/2015 02:48	Supervisor2	<None>
nitesh123/Fixed Deposite	08/07/2015 00:30	Supervisor2	<None>
nitesh123/Home Loan	08/07/2015 00:30	Supervisor2	<None>

Figure: 2.79

10. In order to view content of a searched folder(s), click that particular folder from the list. The **folder** and its **documents** are displayed on the "folder information pane" of the main screen.

Working with OmniDocs

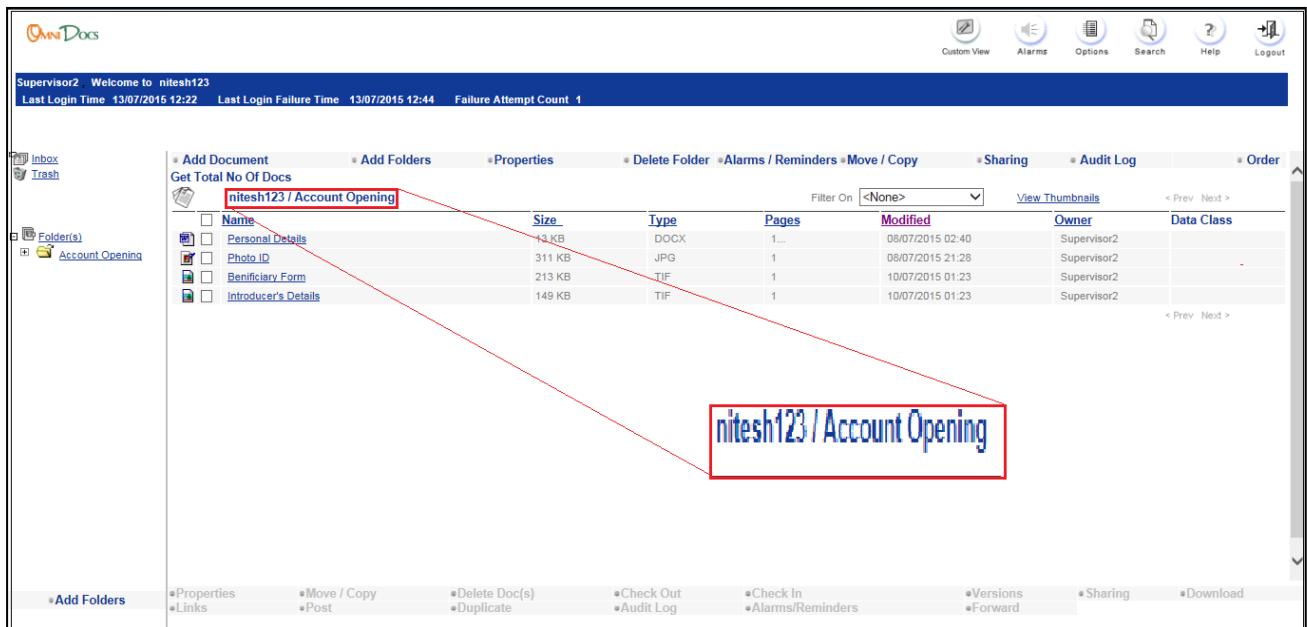


Figure: 2.80

II. Date Search:

To search a folder on the basis of a **date**, proceed as follows:

1. Click the **Date** label of the **Folder** tab in the "Search" screen. The "Date" tab screen appears.
2. Click the ellipsis button beside the **Search In** list box to view the list of folders present in the logged-in Cabinet.

Working with OmniDocs

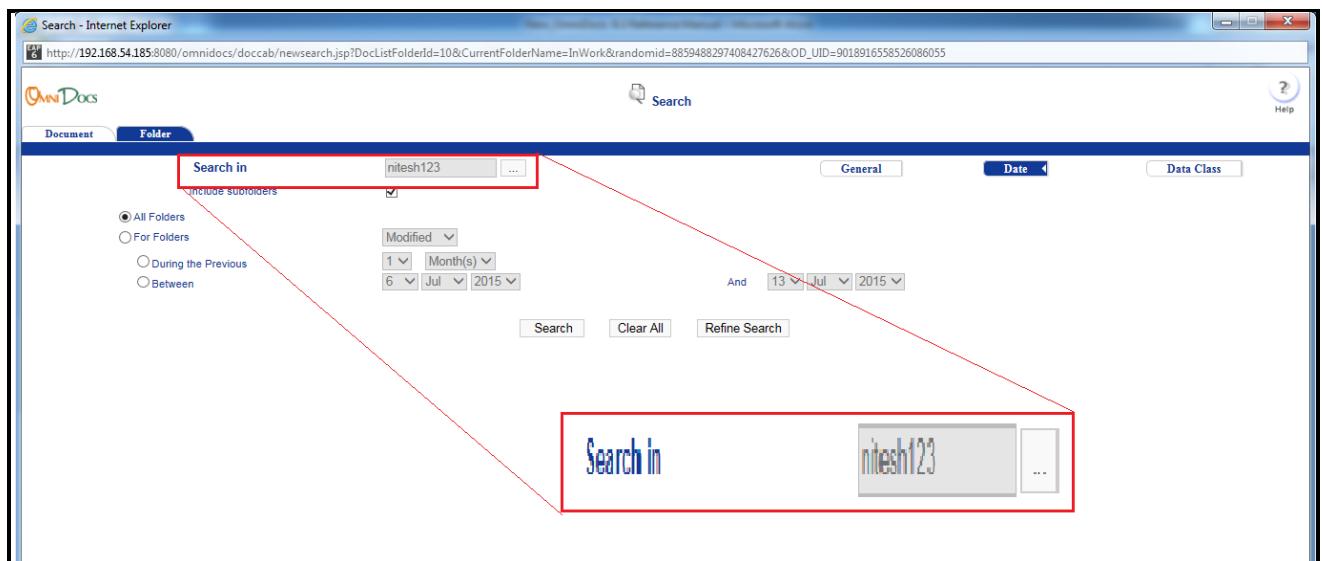


Figure: 2.81

3. **Select Folder** window pop-ups. Select a folder from the "Select Folder" window on which you need to perform a date based search. Click **OK**. Refer **Figure: 2.71**.
4. The selected folder appears in the **Search in** textbox. To perform a search on the subfolders within the folder, check-in the **Include Subfolders** check-box.
5. For performing search on all the sub-folders of a selected folder or all the folders of a selected cabinet, check-in the **All Folders** option.

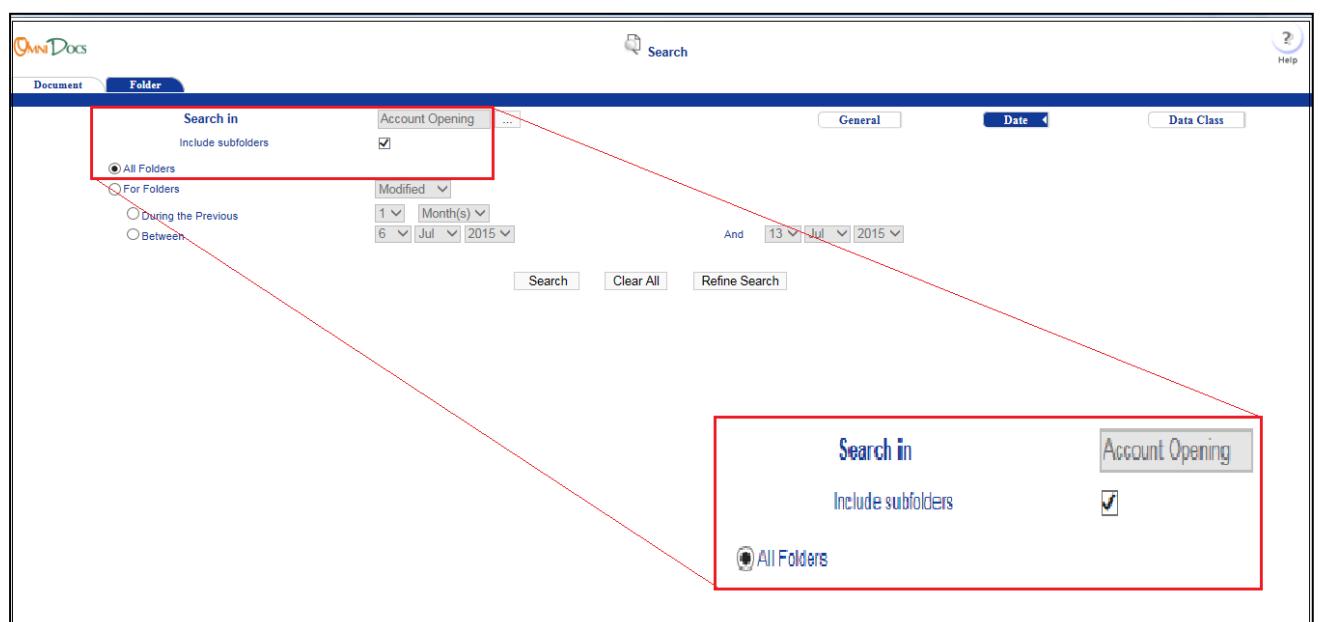


Figure: 2.82

6. Click **For Folders** selection button and select the required option from the "For Folders" drop-down list.

Here searching is available on the basis of **Modified Date, Accessed Date** and **Created Date** of the folders.

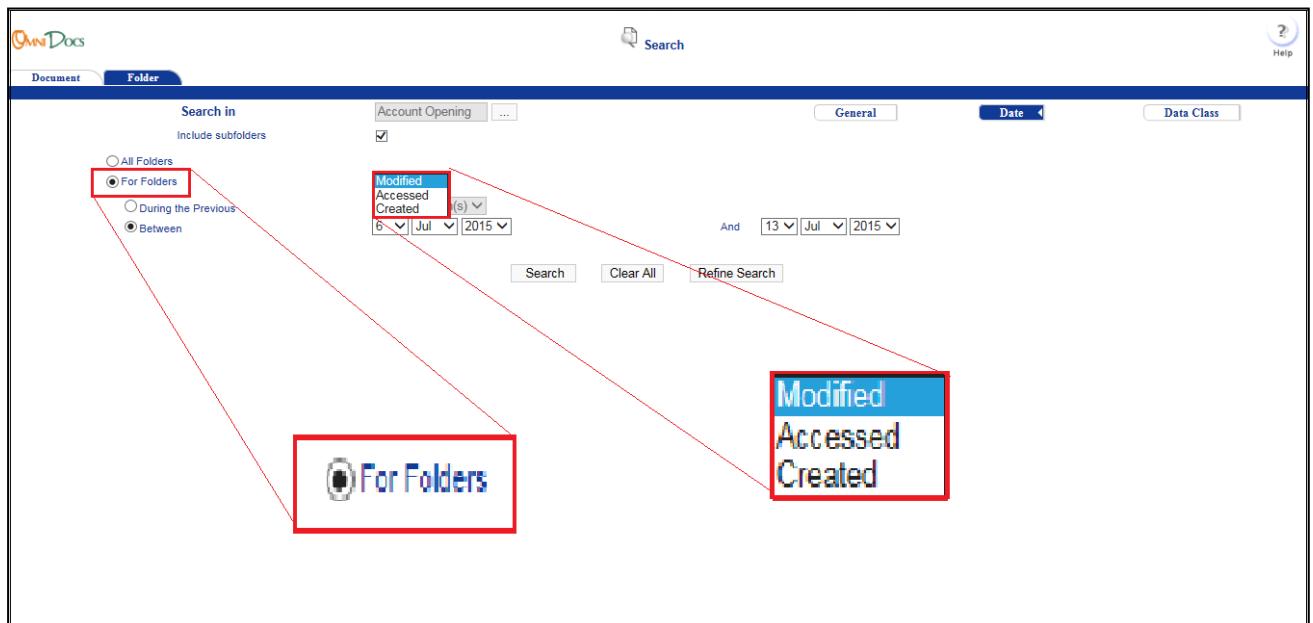


Figure: 2.83

7. Select the option **During the Previous** to search the folders during previous Months/Weeks/Days.

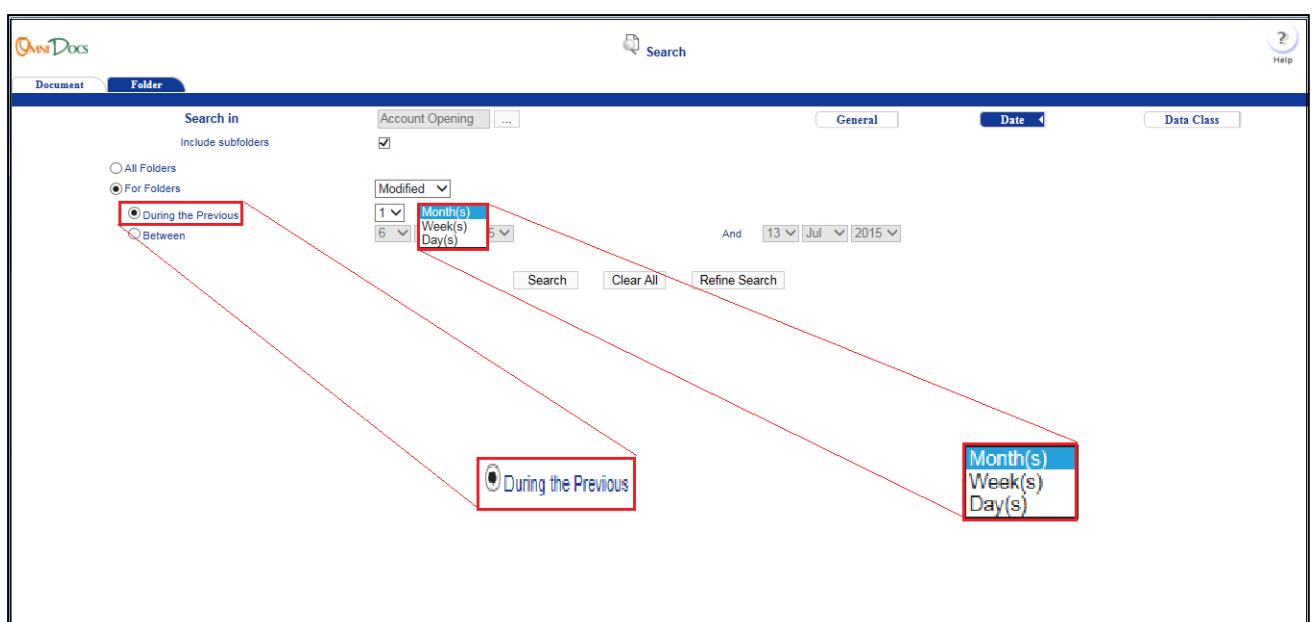


Figure: 2.84

Working with OmniDocs

8. Select the option **Between** to search the folders between the specified dates.

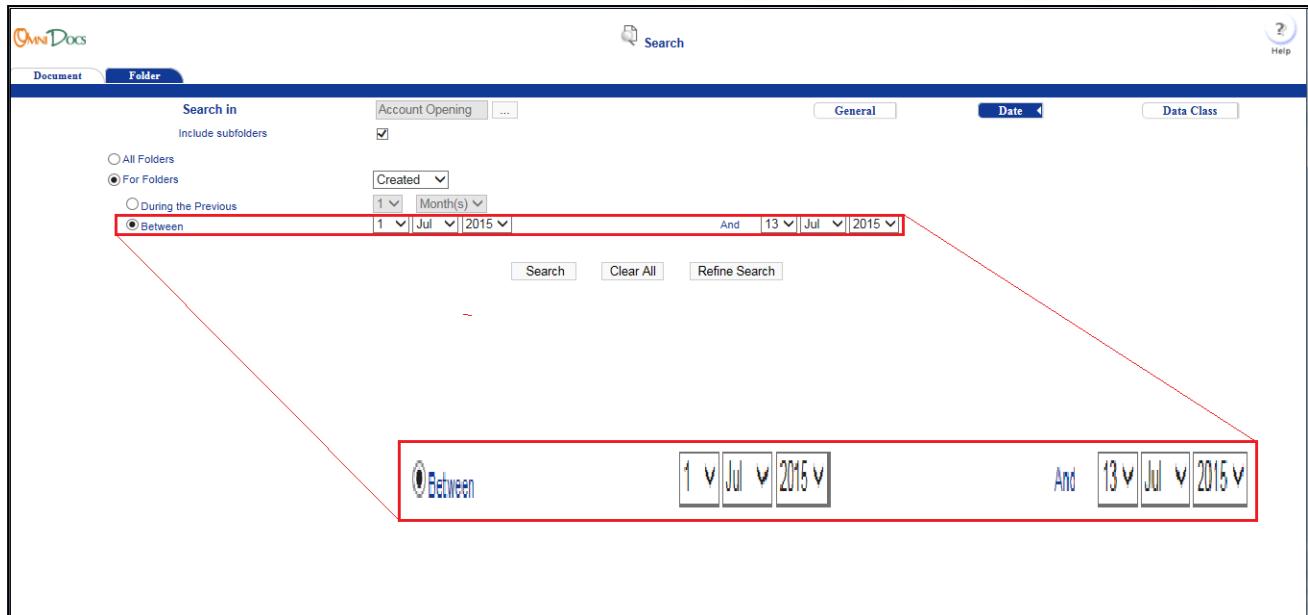


Figure: 2.85

9. In order to search the folders on a specified criteria, click **Search** command button.
The folders that satisfy the defined date search criteria appears in the **Folder Search Results** pane

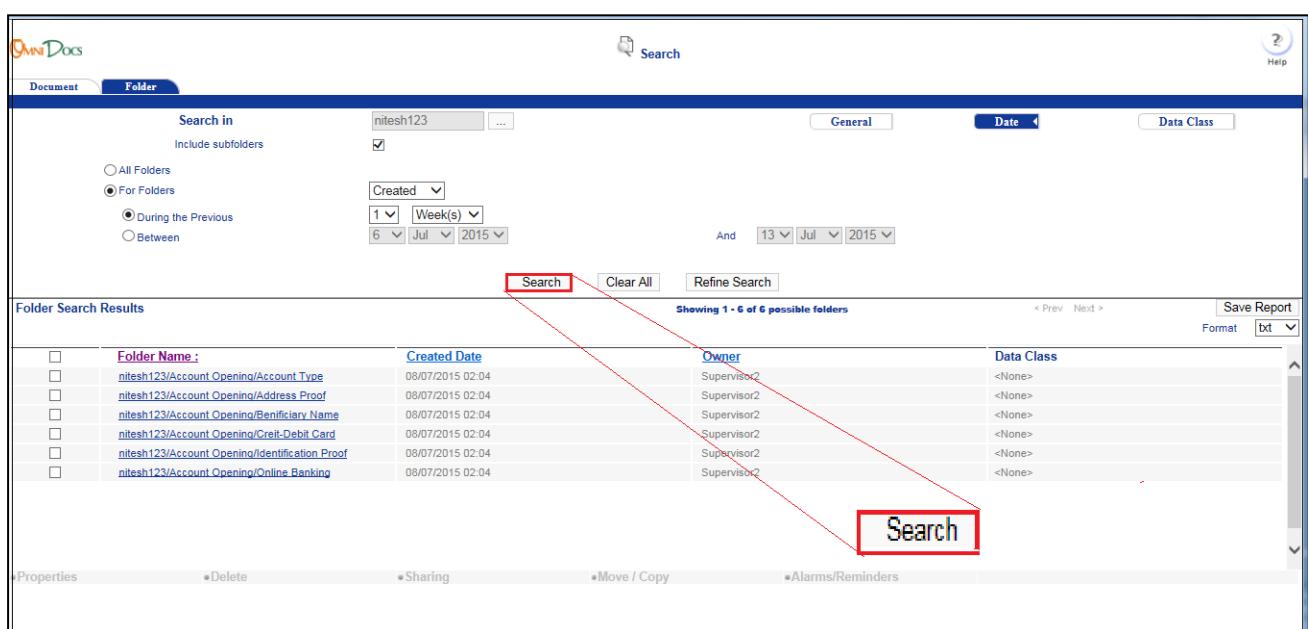


Figure: 2.86

10. In order to clear the defined date criteria and search results, click **Clear All** command button.

11. In order to clear the search results, click **Refine Search** command button.

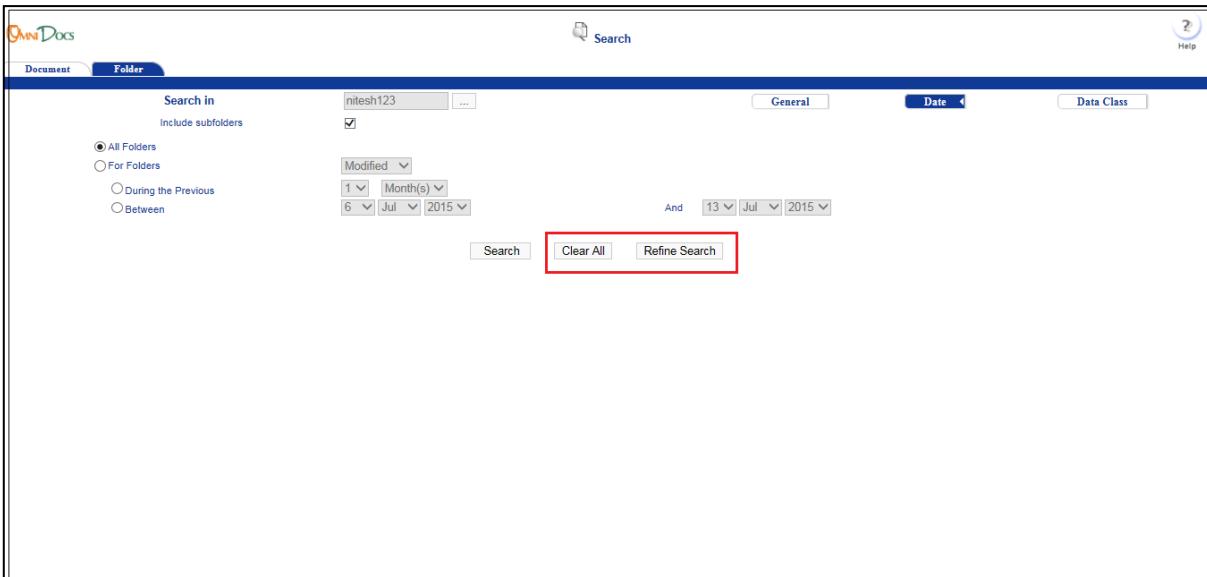


Figure: 2.87

III. Data Class Search:

To search a folder on the basis of a **data class**, proceed as follows:

- a. Click the **Data Class** tab on the Folder tab page on the Search screen. The Data Class tab page opens.
- b. Select a folder from the **Search-in** list box.
- c. You may select the **Include sub folders** option if you need to perform a search on all folders within the folder and select a data class from the Data Class list box to perform a search.

Working with OmniDocs

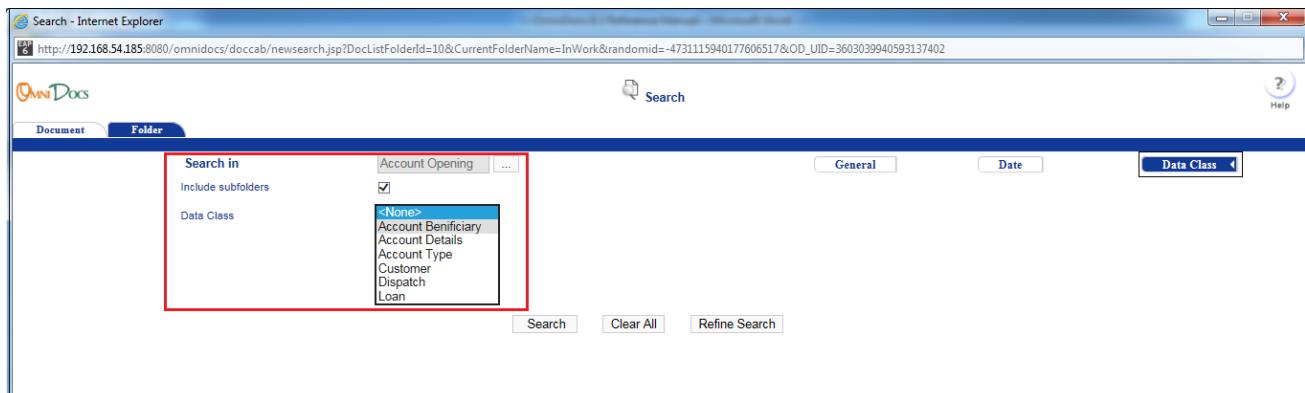


Figure: 2.88

- d. The Field Name, Operator, Value are displayed.

Operators are of two types: **Comparison** Operator and **Logical** Operator

- e. Comparison Operator: Comparison Operators are: - =, <, >, Between.

- The field name is same as the selected field name in the Field Name combo box.
- Select the comparison operator from the Operator combo box.
- Specify the value for the field name in the text box provided or
- Select the value by clicking command button.
- The Pick List Values screen is invoked
- Select the required value.
- Click Next link to view the next batch of index values.
- Select the required value and click else click Close.
- The selected value is displayed in the Data Class index fields.
- The selected value is displayed in the Value text box.
- Select the logical operator from the Logical Operator combo box.
- Click Search to invoke the search results.

- f. In order to clear the defined **data-class** criteria and search results, click **Clear All** command button.

- g. In order to clear the search results, click **Refine Search** command button.

2.3.8.2 Folder Search in Web-Desktop

1. Login to **OmniDocs** web.
2. Open the **Search** tab.
3. Click on **Folder Search**. The following screen appears:

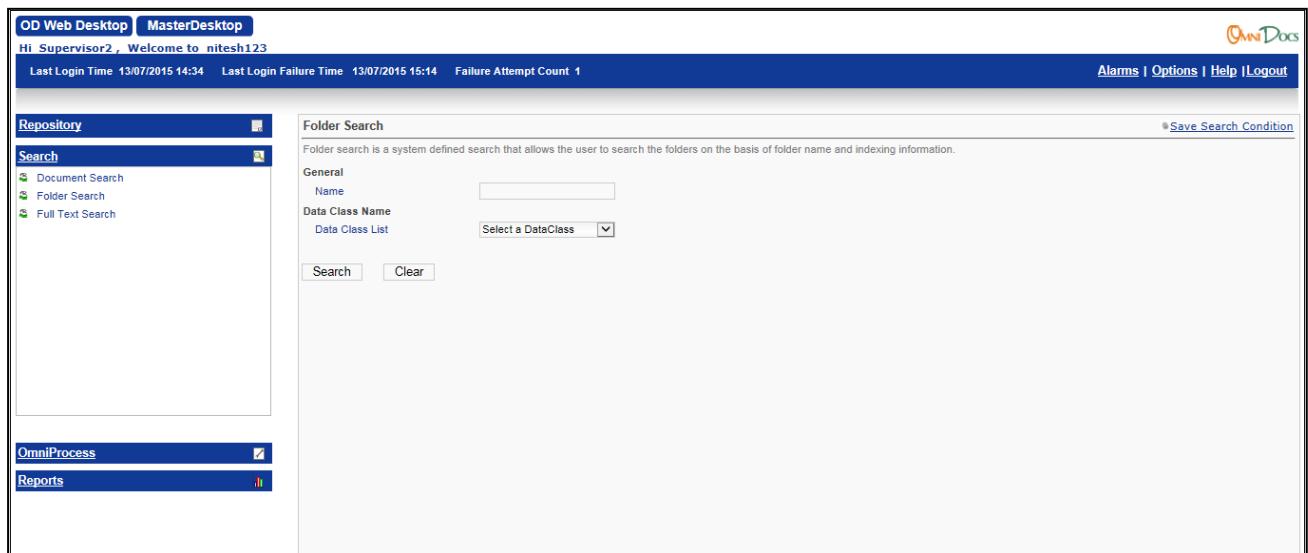


Figure: 2.89

4. Enter the **Name**.
5. Select the **Data Class** from the Data Class List drop down button.
6. Click on **Search** button.
7. All Folders satisfying the search criteria will be displayed.
8. This is the default Folder search.
9. Folder Search is configurable and can be configured as per need. Admin can configure "**Folder search**" configuration from OmniDocs admin. Please refer to "**OmniDocs 9.1 Administration Manual.doc**" to configure it from OmniDocs admin.
10. Admin user can modify the search configuration to make it more specific.
 - User can add "**Date**" criteria in search.
 - In "**general tab**" user can add more search parameters like **name** and **owner**.

Working with OmniDocs

- Data Class search can be made more specific. Admin user can select one particular data class which will be used while searching. Moreover admin user can specify which fields of selected data class to be used while searching.

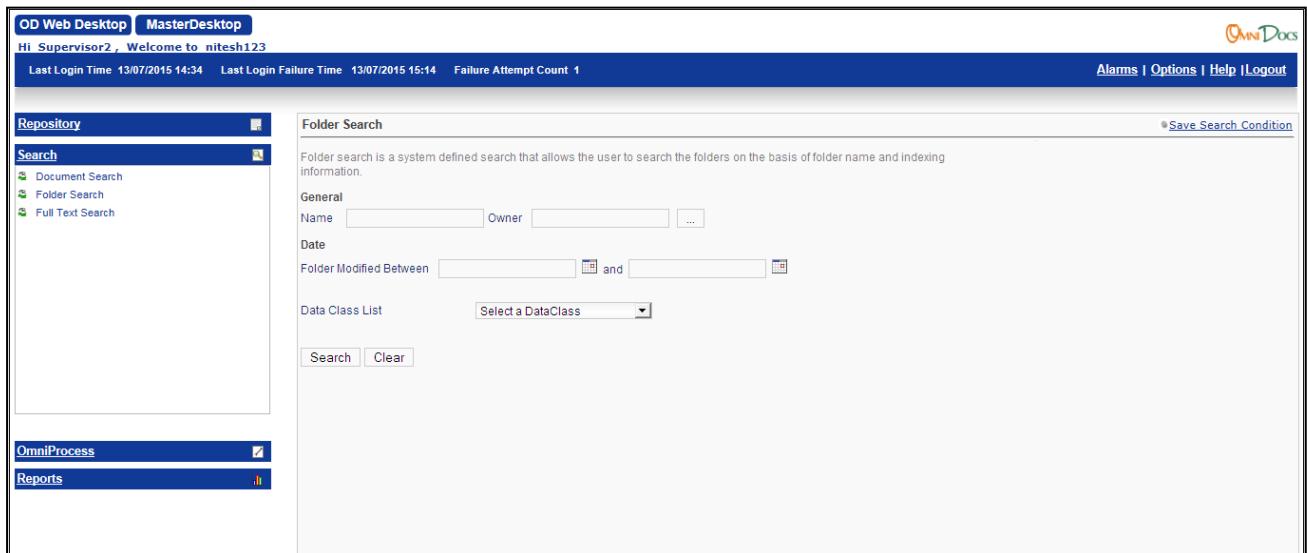


Figure: 2.90

11. Enter the **Search Criteria**.
12. Click on **Search** button.
13. All the folders satisfying the search criteria will be displayed.

Folder operations on search results

1. Select any folder from the list of search results
2. Now user can perform some operations on the searched Folders. To know about working of these operations please refer to section [2.3-Working with Folders](#).

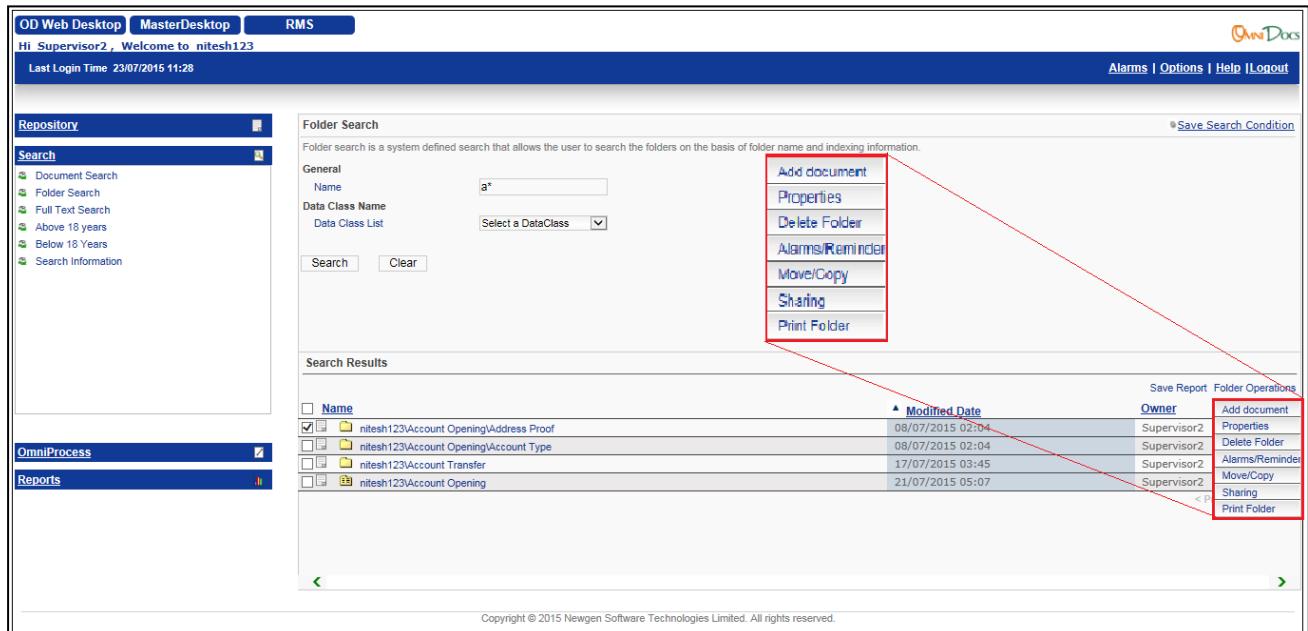


Figure: 2.91

3. These folder operations are configurable from OmniDocs admin. Admin user can configure which folder operations to be allowed on searched folders. Refer to "**OmniDocs 9.1 Administration Manual.docx**" to configure it from OmniDocs admin.

Viewing Folders from search Results

1. Select any folder from the list of search results.
2. Click on the **Document List** box, present beside the select folder checkbox.

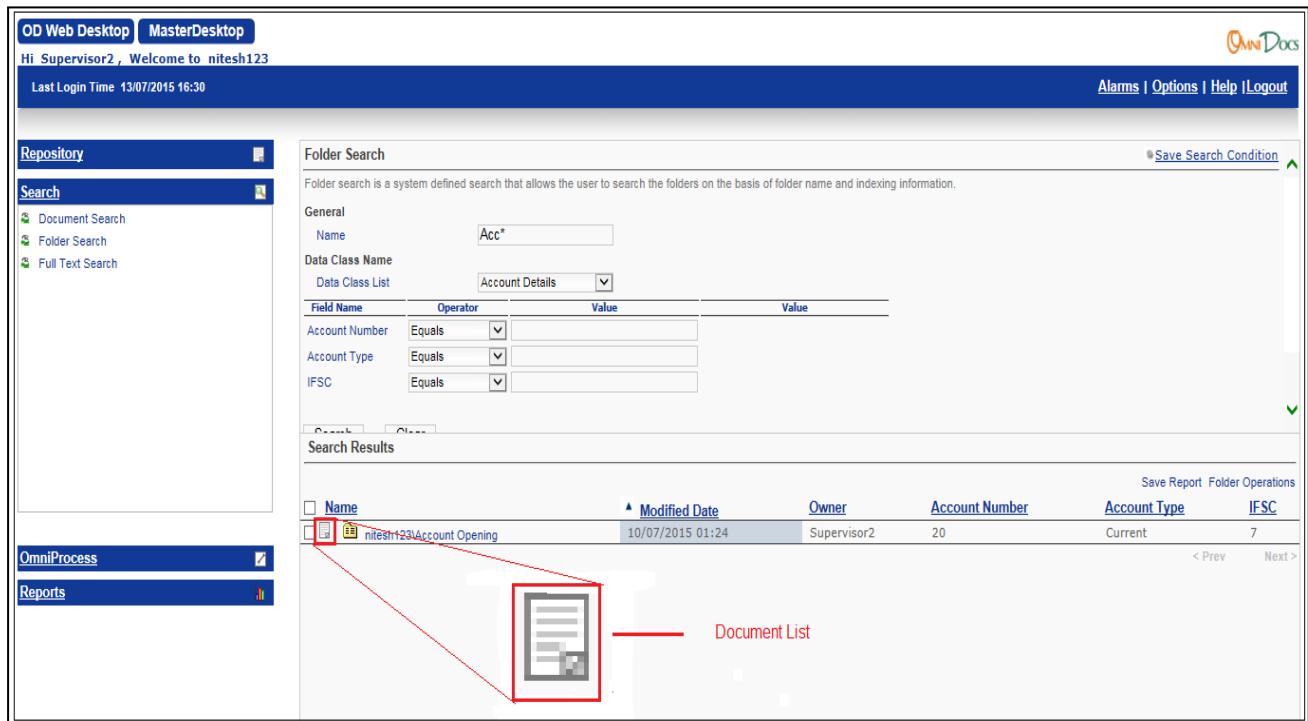


Figure: 2.92

3. The list of documents present in the folder will open.
4. To carry out any operation, select document and select the required operation from the document operation section.
5. To open any document, click on it.
6. In folder View screen, left pane shows the data class associated with the folder. Right pane shows the combo of documents present in folder. First document from the list is open by default. User can select any document from combo to view it. Image documents will open in image viewer. Other types of document like docx, xlsx will open in native application.

Working with OmniDocs

The screenshot shows the OmniDocs interface. On the left, the 'Data View' section displays 'Introducer's Details' for a file named 'Supervisor2.tif' (149 KB, modified 10/07/2015 01:23). It includes a 'View Linked Documents' link and a 'Notes' section with a pencil icon. Navigation buttons like '< New' and '> Note Sheet' are at the bottom. On the right, the 'Criteria for filing' section shows tables for RAUM* categories and Form PF sections, both with detailed sub-tables. The top right corner has a 'Help' button and navigation links.

Figure: 2.93

7. Admin user can also configure the **menu bar**, **toolbar** and **annotation bar** in document view,

Saving Search condition:

1. User can also add customized search criteria for folder search from OD web desktop. Select “**Folder Search**” from search tab and click on “**Save Search Condition**” as shown in image below.

The screenshot shows the OmniDocs Web Desktop interface. The left sidebar has tabs for 'Repository', 'Search' (with 'Folder Search' selected), and 'OmniProcess'. The main area is titled 'Folder Search' and contains search criteria for 'Name' (set to 'Acc*') and 'Data Class Name' (set to 'Account Details'). Below this are three rows of filters for 'Field Name': 'Account Number' (operator 'Equals'), 'Account Type' (operator 'Equals'), and 'IFSC' (operator 'Equals'). A red box highlights the 'Save Search Condition' button. Another red box highlights the 'Save Search Condition' link in the top right corner of the search results table. The results table lists files like 'Introducer's Details', 'Beneficiary Form', 'Photo ID', and 'Personal Details'. The bottom of the page includes copyright information and navigation links.

Figure: 2.94

2. When user clicks on “**Save Search Condition**” then a pop up opens up.
3. Enter the **Search Criteria** which you want to save.
4. Enter the **Criterion Name**.
5. Click on **Save** button to save, else, click **Cancel** to close the “Save Search Condition” pop up without making any changes.

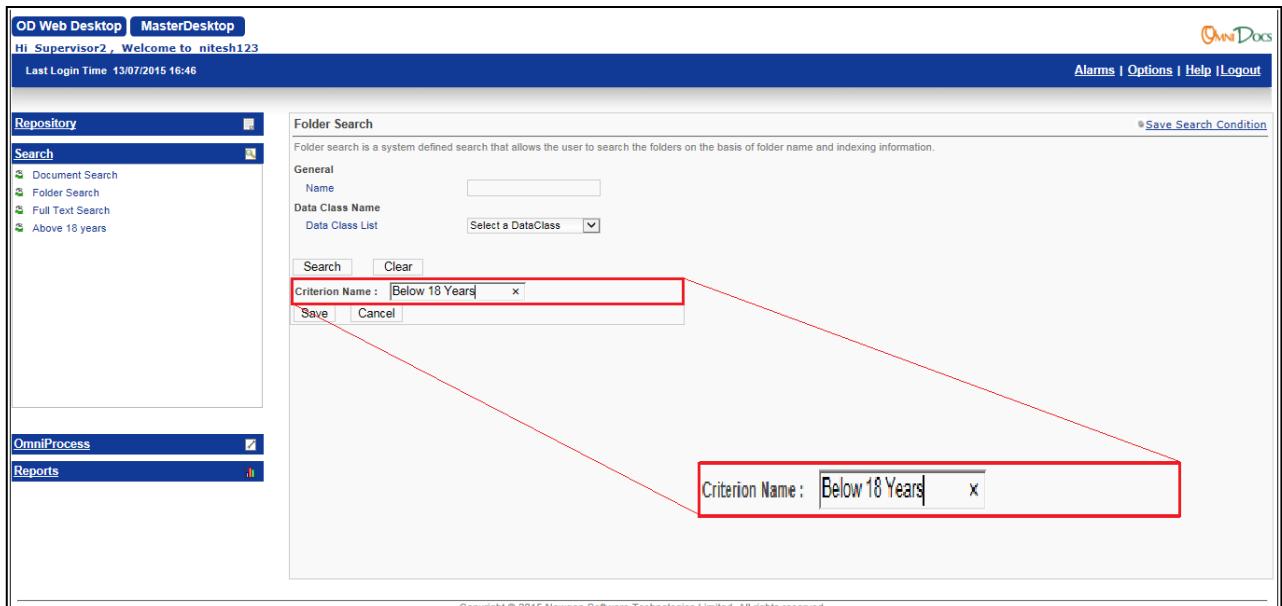


Figure: 2.95

6. New configuration is added to the list of existing configurations.

Working with OmniDocs

The screenshot shows the OmniDocs Web Desktop interface. At the top, there are tabs for 'OD Web Desktop' and 'MasterDesktop'. The main header says 'Hi Supervisor, Welcome to odcldsql' and 'Last Login Time 07/08/2015 16:22'. On the right, there are links for 'Alarms | Options | Help | Logout' and the OmniDocs logo.

In the left sidebar, under 'Search', there are options: Document Search, Folder Search, Full Text Search, and 'Below 18 Years', which is highlighted with a red box.

The main content area has a section titled 'Below 18 Years' with a sub-section 'Below 18 Years is a user defined search based on the requirement of the user for search result'. It includes an 'Include SubFolder' checkbox and a search input field with the placeholder 'Name a*'. Below this is a 'Search' button and a 'Clear' button.

A red box highlights the link 'Below 18 Years' in the search results table.

The 'Search Results' table has columns: Name, Modified Date, and Owner. It lists two items:

Name	Modified Date	Owner
odcloudsq\fol1\ashu	07/08/2015 14:23	ashu
odcloudsq\Account Opening	07/08/2015 16:25	Supervisor

At the bottom right of the table, there are links for 'Save Report' and 'Folder Operations'.

Figure: 2.96

7. Click the **new added search configuration** from the list of search configurations.
8. The folders satisfying the clicked search criteria, appears under the **Search Result** section of the screen.

2.3.9 Move/Copy

To **Move / Copy** a folder follow the following steps:

1. Select a folder shown on the left pane of the main screen and folder information appears on the Folder Information pane on the right pane of the main screen of the **Master Desktop**. Click the **Move/Copy** link on the Folder Information pane.

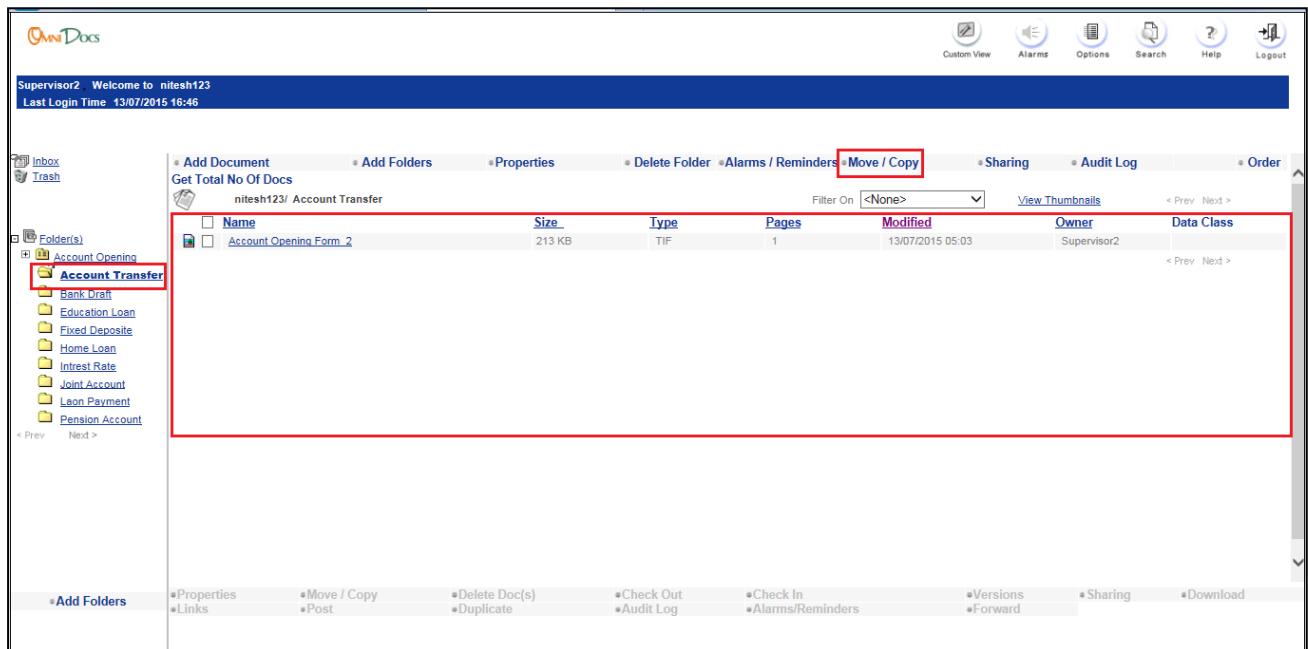


Figure: 2.97

OR

Select a folder from the "Repository" of OD **Web Desktop** screen, the folder information appears on the Folder Information pane on the right pane of the Web Desktop screen. Click the **Move/Copy** link

Working with OmniDocs

The screenshot shows the OmniDocs Repository interface. At the top, there's a header bar with 'OD Web Desktop' and 'MasterDesktop'. Below it, a message says 'Hi Supervisor2 , Welcome to seq_28apr'. The main area is titled 'Repository' and shows a list of items under 'seq_28apr/portugese'. The list includes various files and folders with details like Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. A context menu is open over a folder named 'portugese', and the 'Move/Copy' option is highlighted with a red box. Other options in the menu include 'Add Folder(s)', 'Properties', 'Delete Folder', 'Sharing', 'Alarms/Reminder', and 'Audit Log'. The bottom of the screen has a footer with copyright information and navigation links for 'Search', 'OmniProcess', and 'Reports'.

Figure: 2.98

2. The **Move/Copy** folder screen opens up.
3. To select the destination folder, click **Select Folder** link.

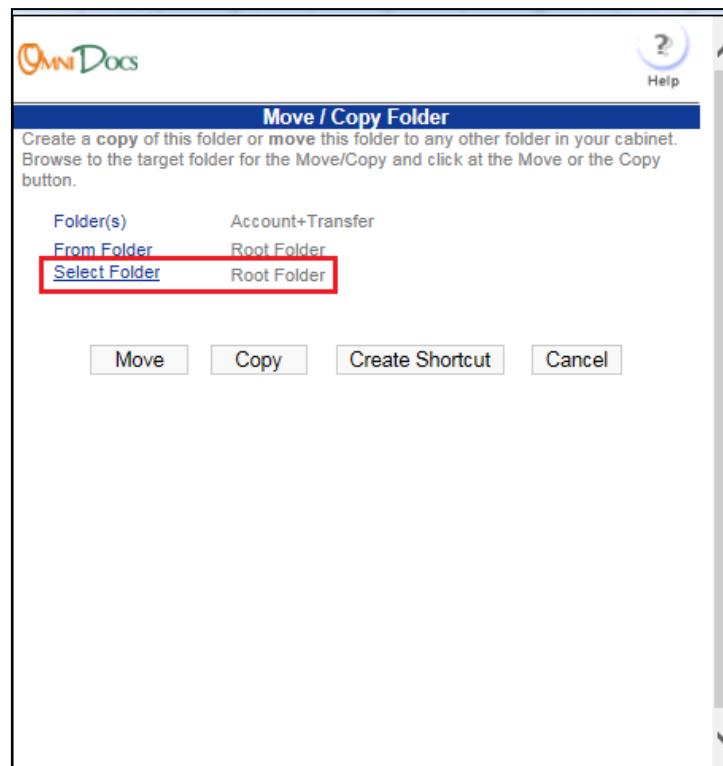


Figure: 2.99

4. Select folder window enclose three options to search destination folder.
- **Browse:** By selecting Browse radio button, user can select destination folder from the list of folders shown in the list. The **Browse** is selected as default option.

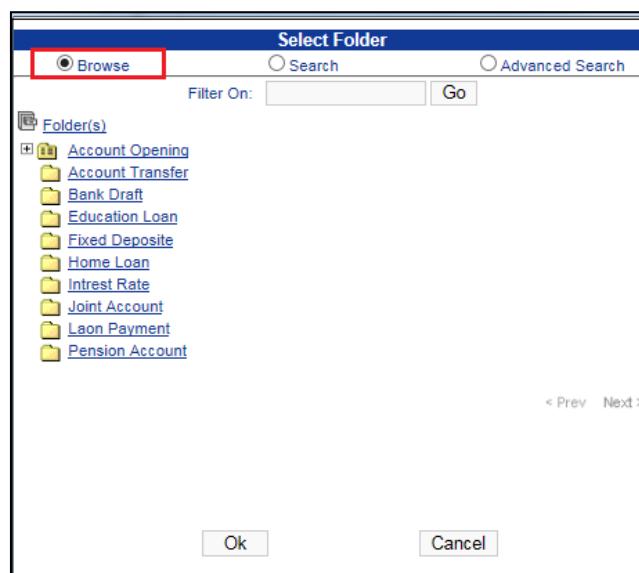


Figure: 2.100

- **Search:** Select "**Search**" option to look for a specific destination folder, User can perform Wild Card search here.
Search will be made through all sub-folder levels and search results will contain folder along with complete folder path of the folder. In the below screen, wild card search is performed using "**Acc***".

Working with OmniDocs

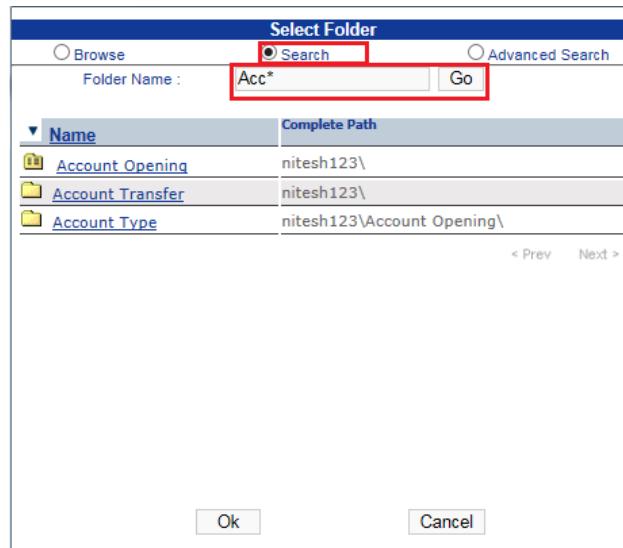


Figure: 2.101

- **Advance Search:** In the “**Advance Search**” option, search screen of OmniDocs opens-up. Here user can execute different kind of search which includes **General** search, **Date** search and **Data** search.

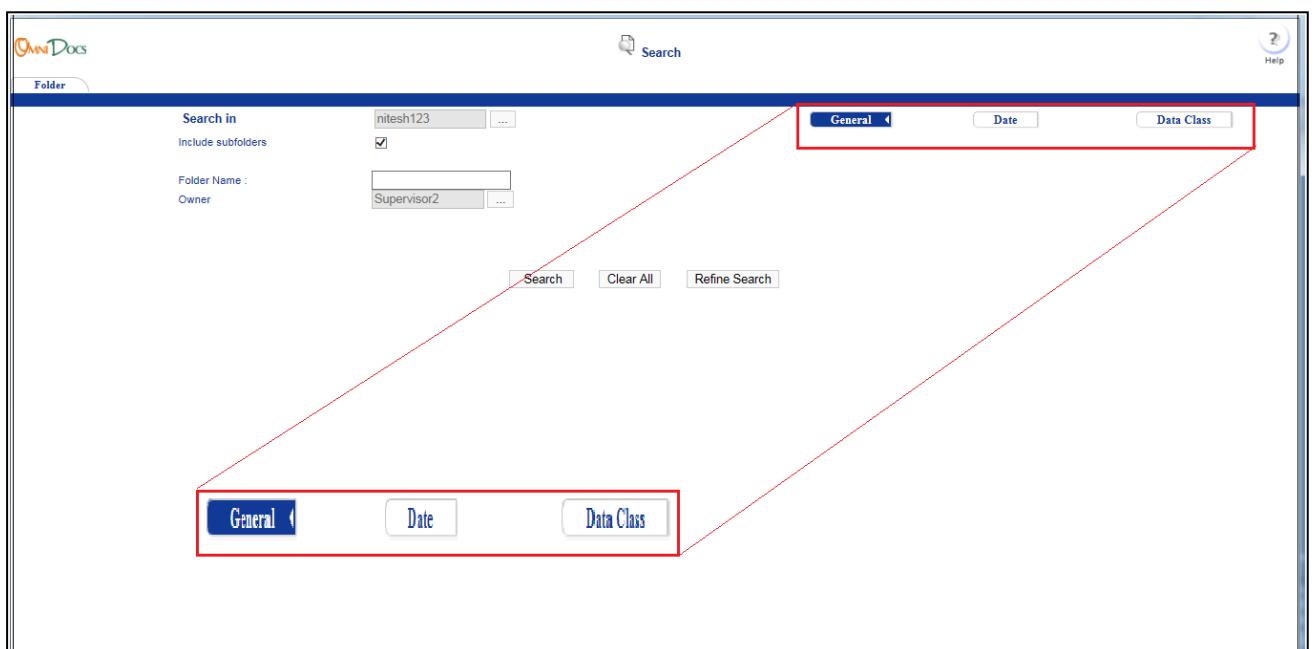


Figure: 2.102

5. Select a destination folder click the **OK** command button to select the destination folder else click on the **Cancel** command button.

Working with OmniDocs

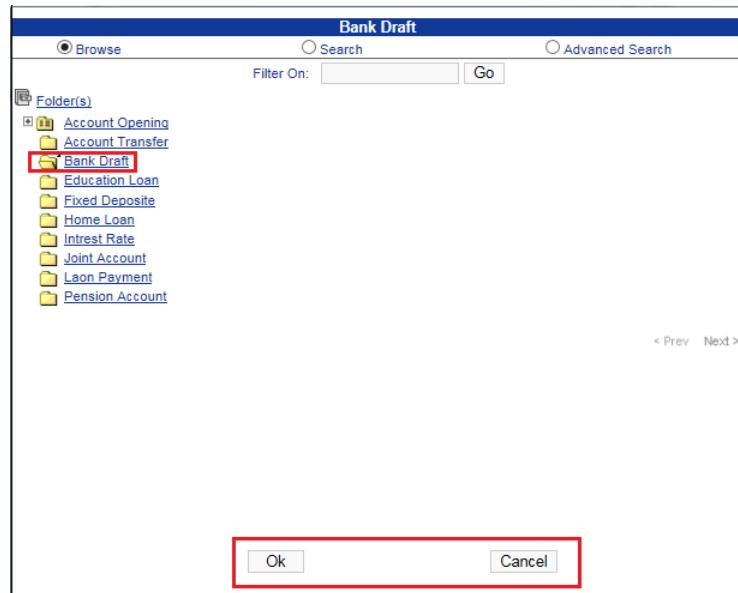


Figure: 2.103

6. To Move the selected folder, Click on **Move** button.
7. To Copy the selected folder, Click on **Copy** button.
8. To create a reference of the folder, Click **Create Shortcut** button.
9. To close the Move/Copy Folder screen, click **Cancel** button.

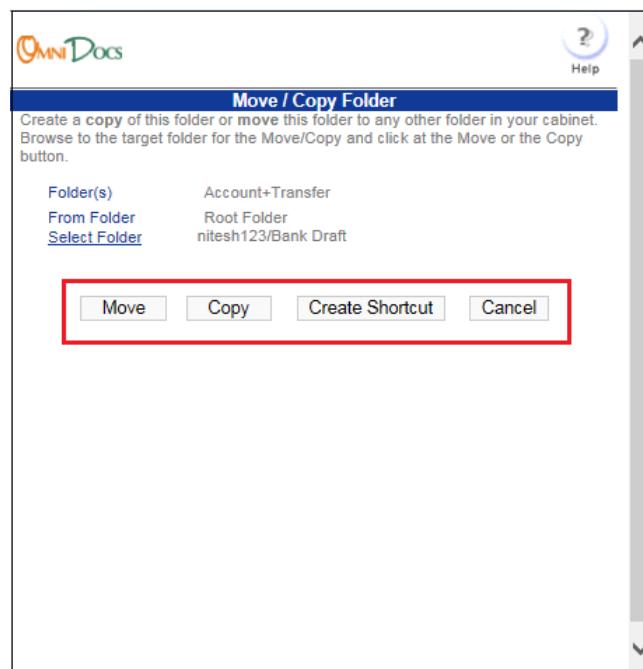


Figure: 2.104

2.3.10 Alarms/Reminders

To Set / View alarms on the folder, follow the following steps:

1. To set alarms/reminders on the folder, click **Alarms/Reminders** link on the folder information pane of **MasterDesktop**. Refer **Figure: 2.105**

OR

Login to **OmniDocs WebDesktop**, go to repository and open any folder. Click on **Alarms/Reminders** link to open the alarms/reminders screen. Refer **Figure: 2.106**.

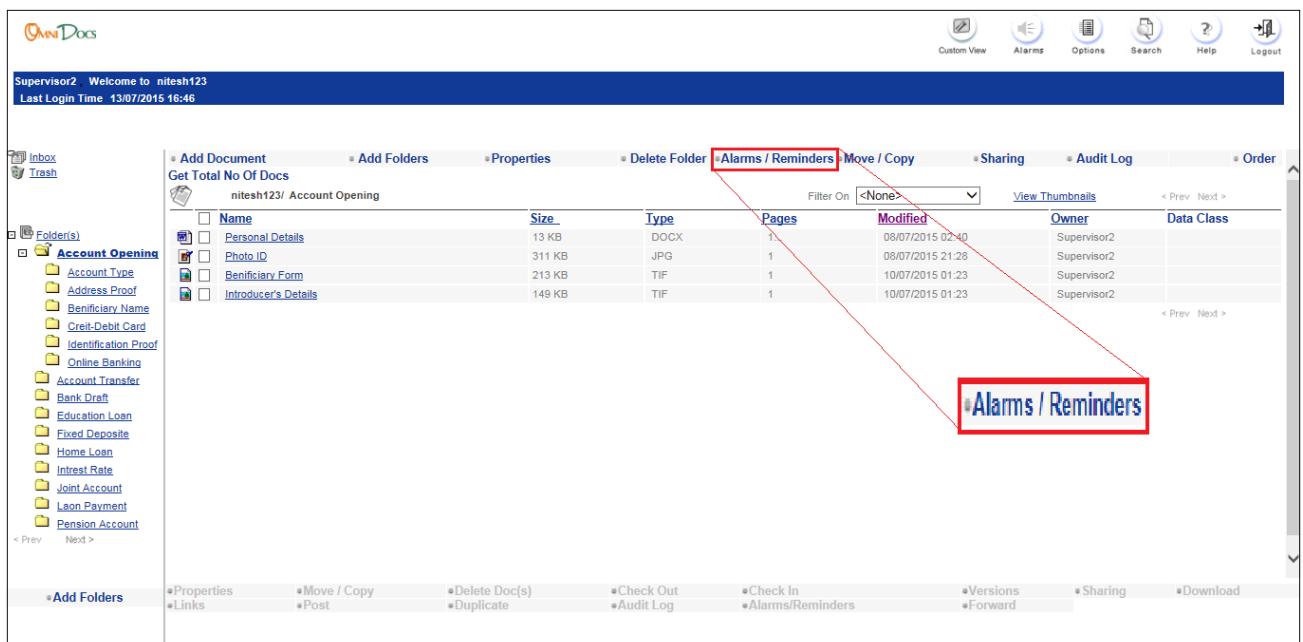


Figure: 2.105

Working with OmniDocs

The screenshot shows the OmniDocs Web Desktop interface. At the top, there's a header bar with 'OD Web Desktop' and 'MasterDesktop'. Below it, a message says 'Hi Supervisor2 , Welcome to seq_28apr'. The main area is titled 'seq_28apr/portugese'. On the left, there's a sidebar with 'Repository' (containing 'Folder(s)' and 'portugese'), 'Search', 'OmniProcess', and 'Reports'. The main content area has a table listing files. A red box highlights the 'Alarms/Reminder' tab in the top navigation bar. The table columns include Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. The table lists several MP4 files and a folder named 'D_20151010_133935790'. At the bottom right of the main area, there are '< Prev' and 'Next >' buttons.

Figure: 2.106

2. The Alarms/reminders screen appears; by default **Alarms** tab appears selected.

The screenshot shows the 'Alarms / Reminders' configuration dialog. The title bar says 'Alarms / Reminders'. The 'Alarms' tab is selected and highlighted with a red box. Below the tabs, there's a descriptive text about alarms and a tip. There are two dropdown menus: 'Notify' (set to 'No User') and 'When' (set to 'Document Uploaded'). A checkbox 'Inherit to subfolder also' is present. Below these are buttons for 'Add' and 'Selected Alarms'. A large empty box is labeled 'Selected Alarms :'. At the bottom, there are 'Delete' and 'Selected Alarms' buttons, and at the very bottom are 'Ok' and 'Cancel' buttons.

Figure: 2.107

3. Select the name of the user to be notified from the **Notify** combo-box by clicking ellipsis button beside the Notify combo-box.

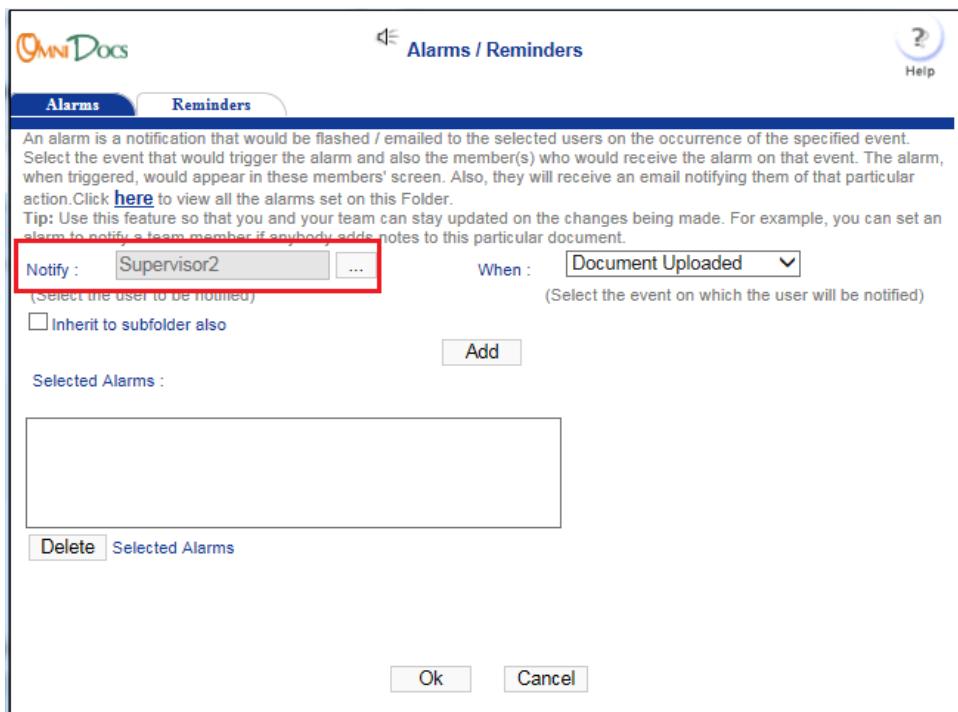


Figure: 2.108

4. Click the ellipsis button beside '**When**' textbox and select instant for alarm
Different types of document level alarms which can be set on folder are listed below.
- **Document Uploaded** – When any document will be uploaded in this folder, alarm will be generated for specified user.
 - **Document Deleted** – When any document will be deleted from this folder, alarm will generate for specified user.
 - **Document Checked In** – When any document will be checked-in to this folder, alarm will be generated for specified user.
 - **Document Checked Out** – When any document will be checked-out from this folder, alarm will be generated for specified user.
 - **Document Moved** – When any document will moved/copied to some other location from his folder, alarm will be generated for specified user.

- **Document Renamed** – When any document from this folder will be renamed, alarm will be generated for specified user.
- **Document Shared** – When any document will be shared from this folder, alarm will be generated for specified user.
- **Notes Added** – When notes will be added to any document of this folder, alarm will be generated for specified user.
- **Folder Added** – When any sub-folder will be added to this folder, alarm will be generated for specified user.
- **Folder moved** – When folder will be moved alarm, will be generated for specified user. If “inherit to subfolder also” checkbox is checked then same alarm will be inherited by sub-folders also.
- **Folder Deleted** – When folder will be deleted alarm will be generated for specified user. If “inherit to subfolder also” checkbox is checked then same alarm will be inherited by sub-folders also.
- **Folder Renamed** – When folder will be renamed, alarm will be generated for specified user. If “inherit to subfolder also” checkbox is checked then same alarm will be inherited by sub-folders also.

Working with OmniDocs

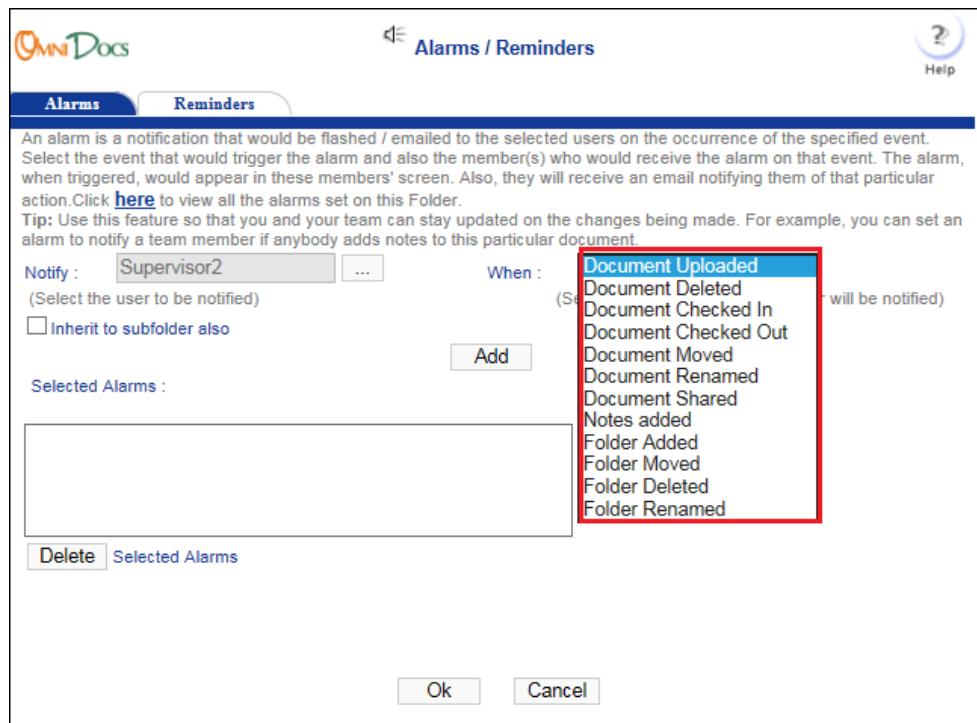


Figure: 2.109

5. Click **Add** button to set the alarm. The status of alarms will display on the **Selected Alarms** textbox.
6. Click the **Delete** button to delete the selected alarms.

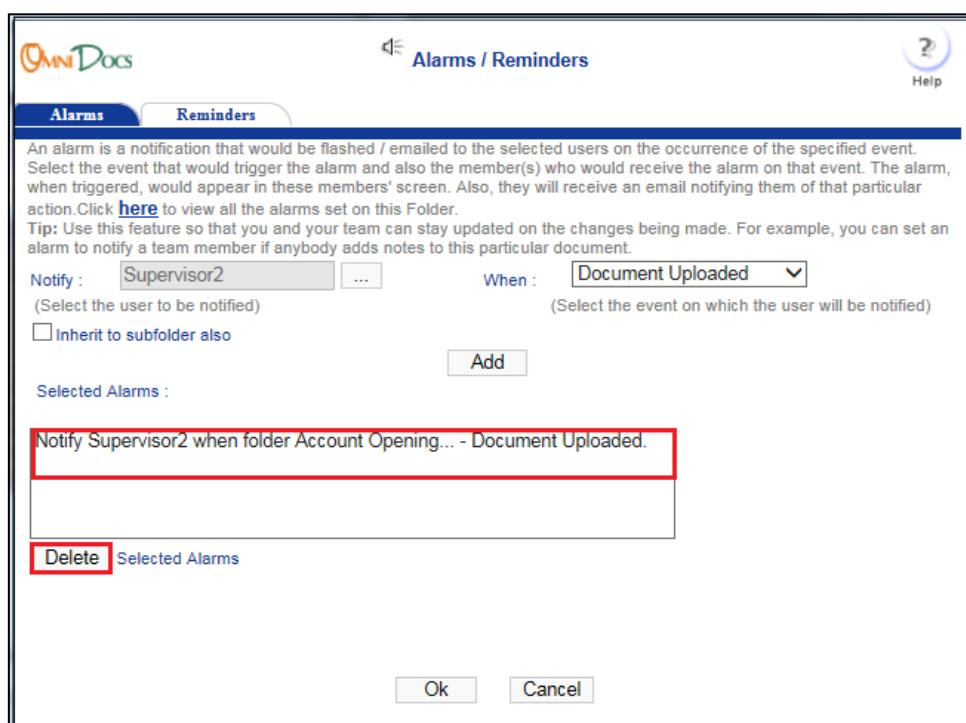


Figure: 2.110

Working with OmniDocs

7. To save an alarm, click the **OK** button, else click the **Cancel** button.

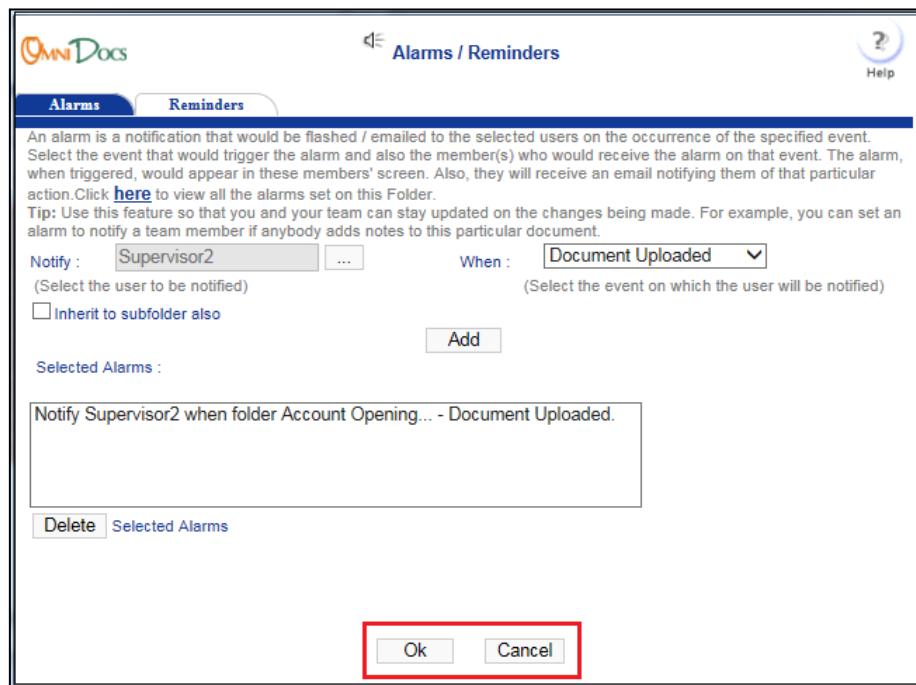


Figure: 2.111

8. To view all the alarms on the folder, click **here** link on the Alarms screen.

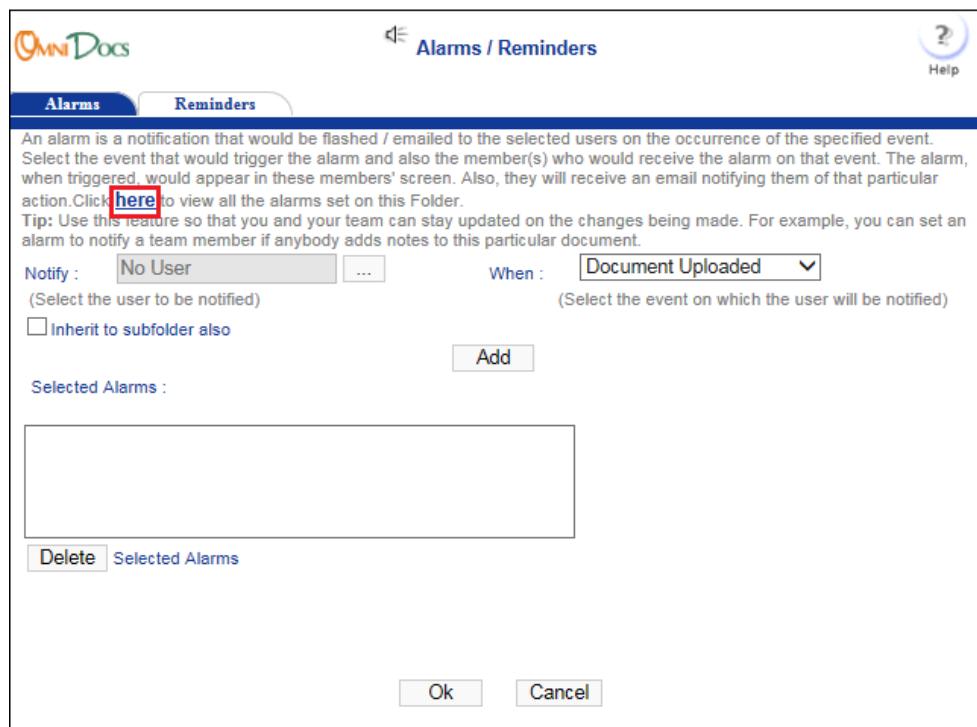


Figure: 2.112

9. The **View All Alarms** screen opens.
10. To delete the alarm, select it and click on the **Delete** button.

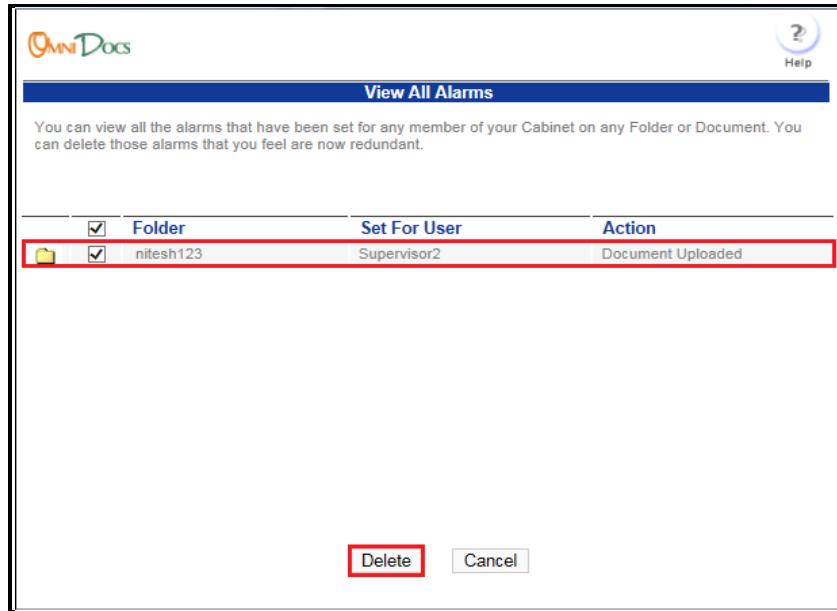


Figure: 2.113

11. To close the view alarms window, click on the **Cancel** button.
12. User can also set alarm at the **cabinet level**. If any alarm is set at cabinet level all folders and sub-folders will by default inherit this alarm.
13. Click on **Reminders** tab to set reminder on a folder

Working with OmniDocs

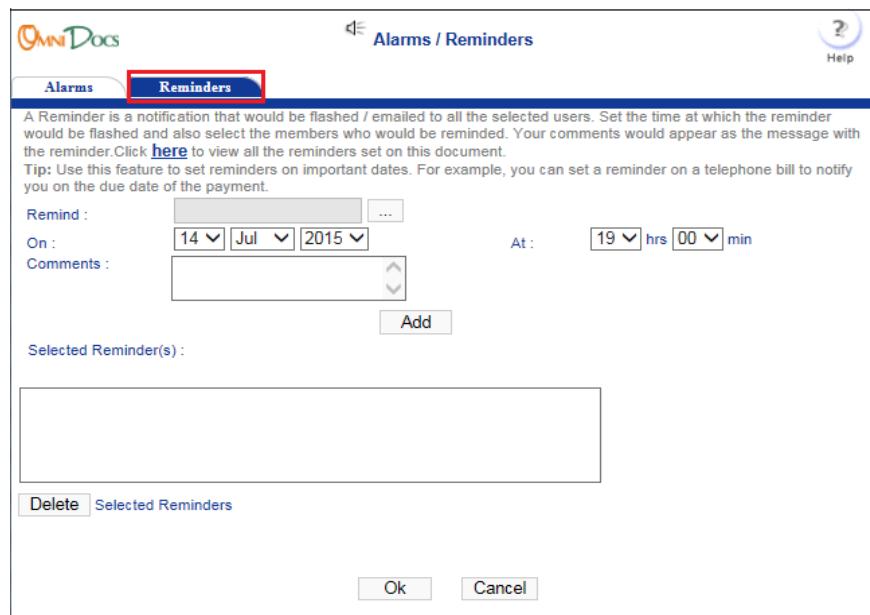


Figure: 2.114

14. Select the name of the user to be reminded from the "Remind" combo-box by clicking **ellipsis button** besides the **Remind combo-box**.
15. Schedule the Reminder by '**On**' and '**At**' selection boxes.
16. Add comments in the **Comments** textbox. Click **Add** to add reminder.

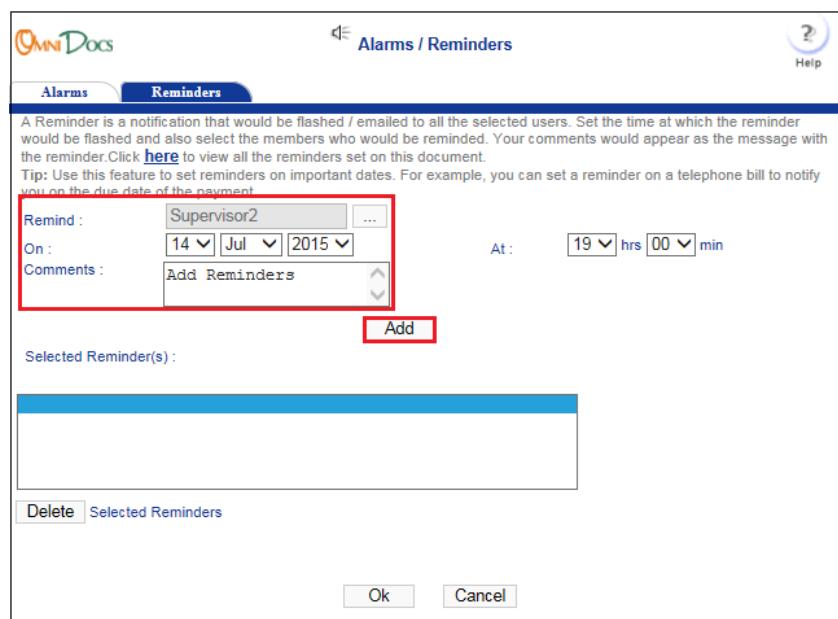


Figure: 2.115

Working with OmniDocs

17. The selected Reminders will display in the **Selected Reminder(s)** textbox. Click **OK** to add else click **Cancel**.

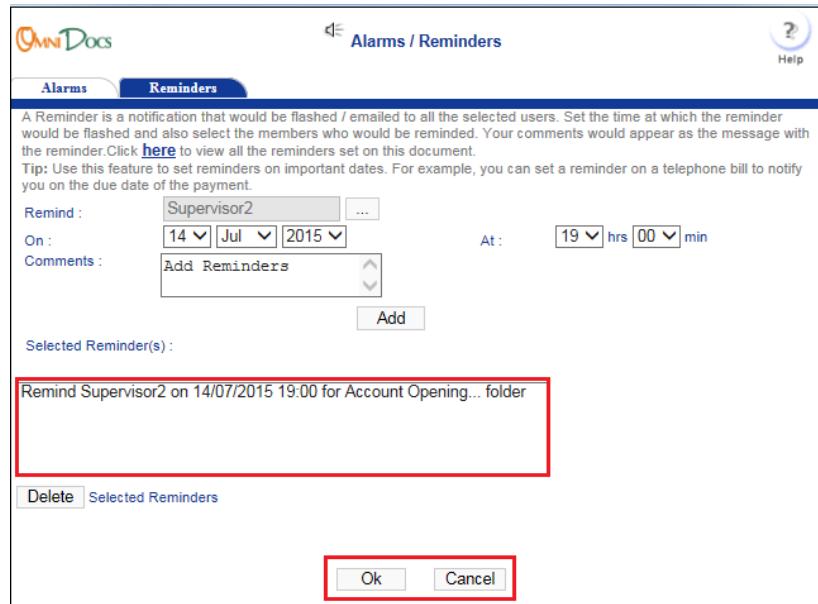


Figure: 2.116

18. To view all the reminders on the folder, click **here** link on the **Reminders** screen.

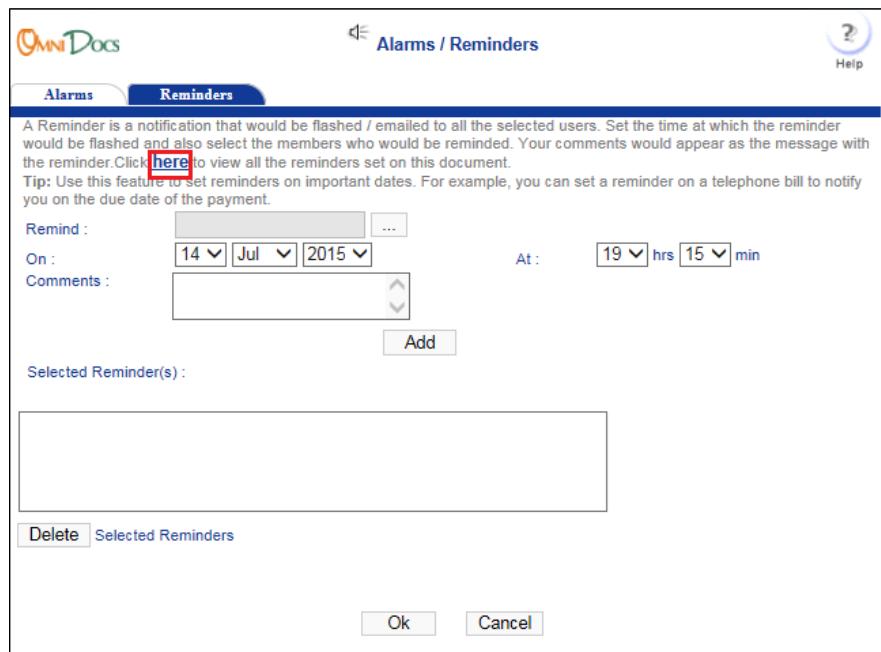


Figure: 2.117

Working with OmniDocs

19. The **View All Reminders** screen opens.
20. To delete the reminder, select it and click on the **Delete** button.

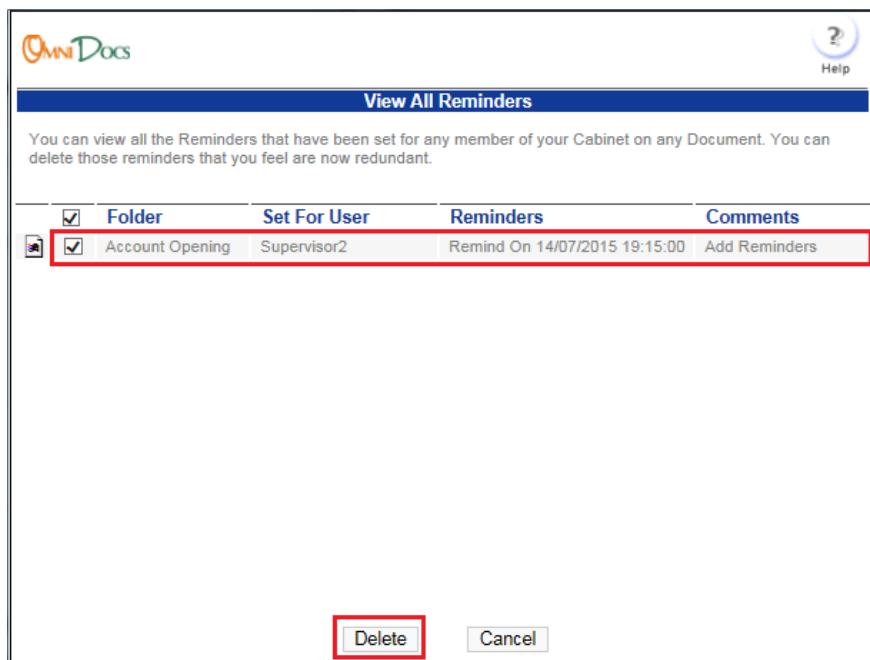


Figure: 2.118

21. To close the view reminders window, click on the **Cancel** button.
22. To view all the alarms/reminders for the logged-in user, click **Alarms** icon on the tool bar of the Main screen. **View Alarms/Reminders/Notifications** screen appears.

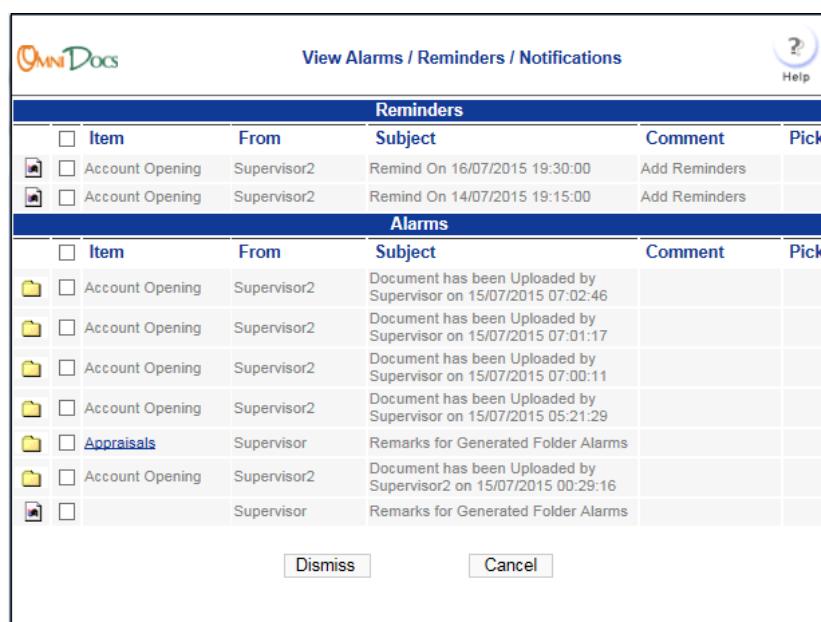


Figure: 2.119

2.3.11 Audit Log

To view **Audit Log of Folder**, follow the following steps

1. Select a folder and click the **Audit Log** of OD WebDesktop.

The screenshot shows the 'OD Web Desktop' interface. At the top, it says 'Hi Supervisor2, Welcome to seq_28apr'. Below that, it displays 'Last Login Time 04/05/2016 16:17' and 'Last Login Failure Time 04/05/2016 16:55' along with 'Failure Attempt Count 1'. On the right, there are links for 'Alarms | Options | Help | Logout'. The main area is titled 'Repository' and shows a list of files and folders under 'seq_28apr/portugese'. A red box highlights the 'Audit Log' link in the context menu for a folder named 'D_20151010_133935790'. The table below lists various media files like MP4s and a PDF, with columns for Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. At the bottom left, there's a 'Search' section with 'OmniProcess' and 'Reports' options. The bottom right corner shows copyright information: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.120

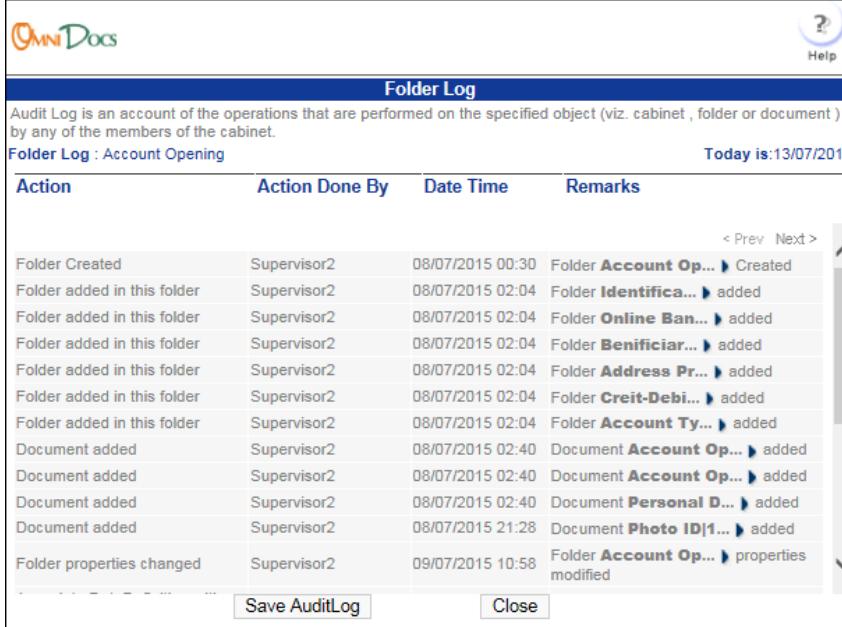
OR

Select a folder and click on the **Audit Log** of OD MasterDesktop.

The screenshot shows the 'OD MasterDesktop' interface. At the top, it says 'Supervisor2, Welcome to nitesh123'. Below that, it displays 'Last Login Time 13/07/2015 16:46'. The main area shows a list of documents under 'nitesh123/ Account Opening'. A red box highlights the 'Audit Log' link in the context menu for a file named 'Introducer's Details'. The table below lists files with columns for Name, Size, Type, Pages, Modified, Owner, and Data Class. At the bottom, there are various document management links like 'Add Document', 'Add Folders', 'Properties', 'Delete Folder', 'Alarms / Reminders', 'Move / Copy', 'Sharing', 'Audit Log', and 'Order'. The bottom right corner shows copyright information: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.121

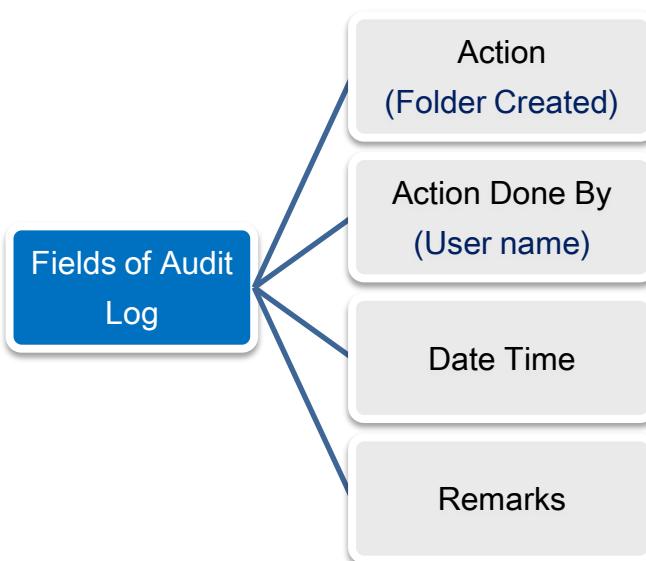
2. The **Folder Log** screen appears.
3. User can view the various operations done by other users on the folders.



The screenshot shows the 'Folder Log' screen in OmniDocs. The title bar says 'Folder Log'. Below it, a message states: 'Audit Log is an account of the operations that are performed on the specified object (viz. cabinet, folder or document) by any of the members of the cabinet.' A timestamp 'Today is: 13/07/2015' is shown. The main area is a table with columns: Action, Action Done By, Date Time, and Remarks. The table lists various actions such as 'Folder Created', 'Folder added in this folder', and 'Document added', all performed by 'Supervisor2' on different dates and times. At the bottom are 'Save AuditLog' and 'Close' buttons.

Action	Action Done By	Date Time	Remarks
Folder Created	Supervisor2	08/07/2015 00:30	Folder Account Op... ► created
Folder added in this folder	Supervisor2	08/07/2015 02:04	Folder Identifica... ► added
Folder added in this folder	Supervisor2	08/07/2015 02:04	Folder Online Ban... ► added
Folder added in this folder	Supervisor2	08/07/2015 02:04	Folder Beneficiar... ► added
Folder added in this folder	Supervisor2	08/07/2015 02:04	Folder Address Pr... ► added
Folder added in this folder	Supervisor2	08/07/2015 02:04	Folder Credit-Debi... ► added
Folder added in this folder	Supervisor2	08/07/2015 02:04	Folder Account Ty... ► added
Document added	Supervisor2	08/07/2015 02:40	Document Account Op... ► added
Document added	Supervisor2	08/07/2015 02:40	Document Account Op... ► added
Document added	Supervisor2	08/07/2015 02:40	Document Personal D... ► added
Document added	Supervisor2	08/07/2015 21:28	Document Photo ID 1... ► added
Folder properties changed	Supervisor2	09/07/2015 10:58	Folder Account Op... ► properties modified

Figure: 2.122



NOTE:

Client Machine IP will be displayed in the audit trails. This will help in tracking the machine location from which the changes has been done.

2.4 Seclore Security Integration

OmniDocs, being a Document Management System, provides rights-based access to documents stored in it. These documents are referred to as protected documents.

For more information on How to make a folder protected, refer to **OmniDocs 9.1 Administration Manual**.

1. Login to OmniDocs web, open the protected folder.
2. Select any document from document list.

The protected document can only be downloaded and no other operation can be performed on it. In case, the user tries to perform any action on the protected document, following alert message appears.

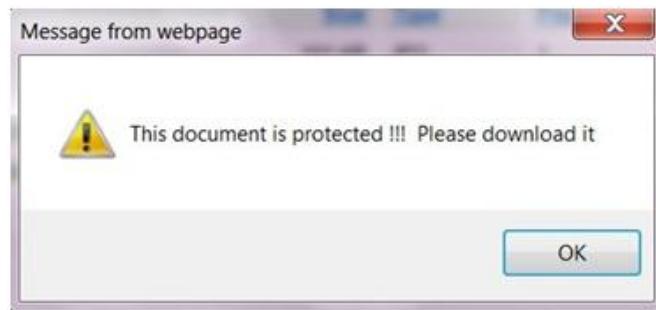


Figure: 2.123

3. Click **Download** button to download the document.
4. When a document is downloaded from protected OmniDocs folder, it is downloaded in protected form.
5. A **Red Lock** is shown on the document to show it is protected.

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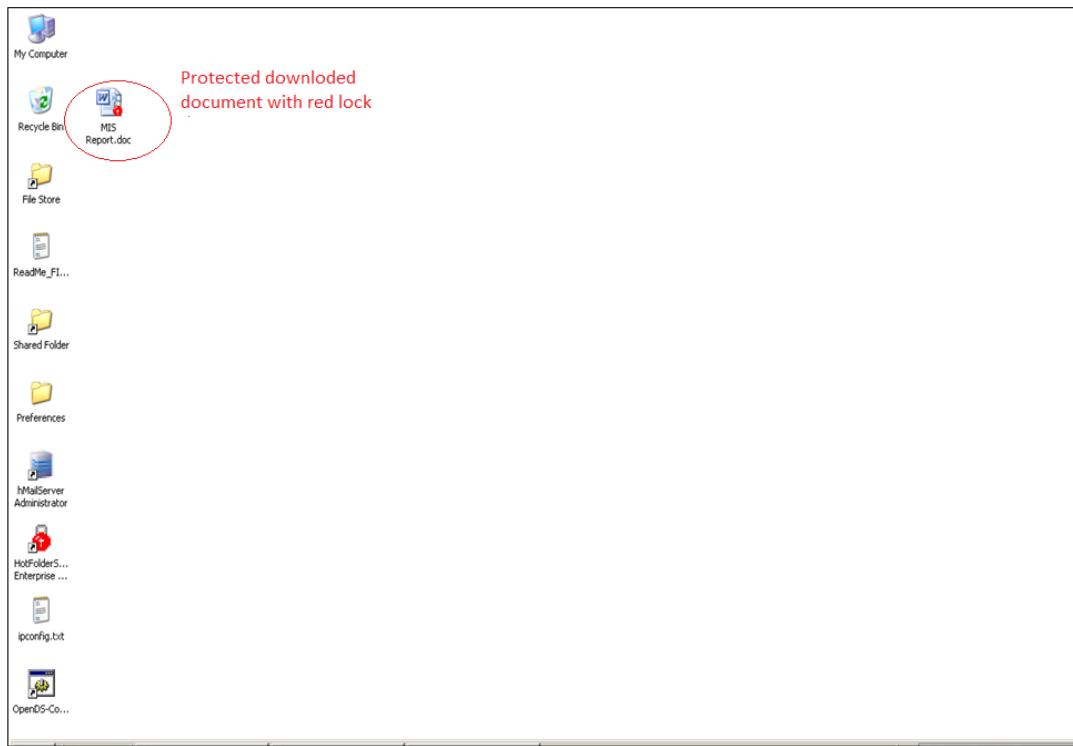


Figure: 2.124

NOTE:

Now once the document is downloaded to user's local machine, the user will be able to perform only those operations for which he/she is given rights. These rights will be driven from "**IRM policy**" which was applied on parent folder of this document and whether this policy is assigned to user or not.

2.5 Viewing Thumbnails

To view **Thumbnails**, follow the following steps:

1. Select a user-defined folder on the left pane of the main screen. The folder information screen appears on the right pane of the main screen.
2. Click **View Thumbnails** link on the Folder Information screen shown on the right pane.

The screenshot shows the OmniDocs application interface. On the left, there's a sidebar with 'Inbox' and 'Trash' icons. Below that is a tree view under 'Folder(s)' showing 'Account Opening' expanded, with sub-folders like 'Account Type', 'Address Proof', etc. At the top, there's a header bar with various icons for 'Custom View', 'Alarms', 'Options', 'Search', 'Help', and 'Logout'. The main content area has tabs for 'Add Document', 'Add Folders', 'Properties', 'Delete Folder', 'Alarms / Reminders', 'Move / Copy', 'Sharing', 'Audit Log', and 'Order'. Under 'Properties', it says 'nitesh123/ Account Opening' and 'Get Total No Of Docs'. Below this is a table with columns: Name, Size, Type, Pages, Modified, Owner, and Data Class. The table contains four rows of document details. At the bottom of the main content area, there's a toolbar with links like 'View Thumbnails' (which is highlighted with a red box), 'Properties', 'Links', 'Move / Copy', 'Post', 'Delete Doc(s)', 'Duplicate', 'Check Out', 'Check In', 'Audit Log', 'Versions', 'Forward', 'Sharing', and 'Download'. A red arrow points from the 'View Thumbnails' link in the top navigation bar down to the 'View Thumbnails' button in the bottom toolbar.

Figure: 2.125

3. The Thumbnail views of all documents within a folder are displayed on the right pane of the Main screen.

NOTE:

The View Thumbnail link is toggle in nature and changes to View Details link when clicked

Working with OmniDocs

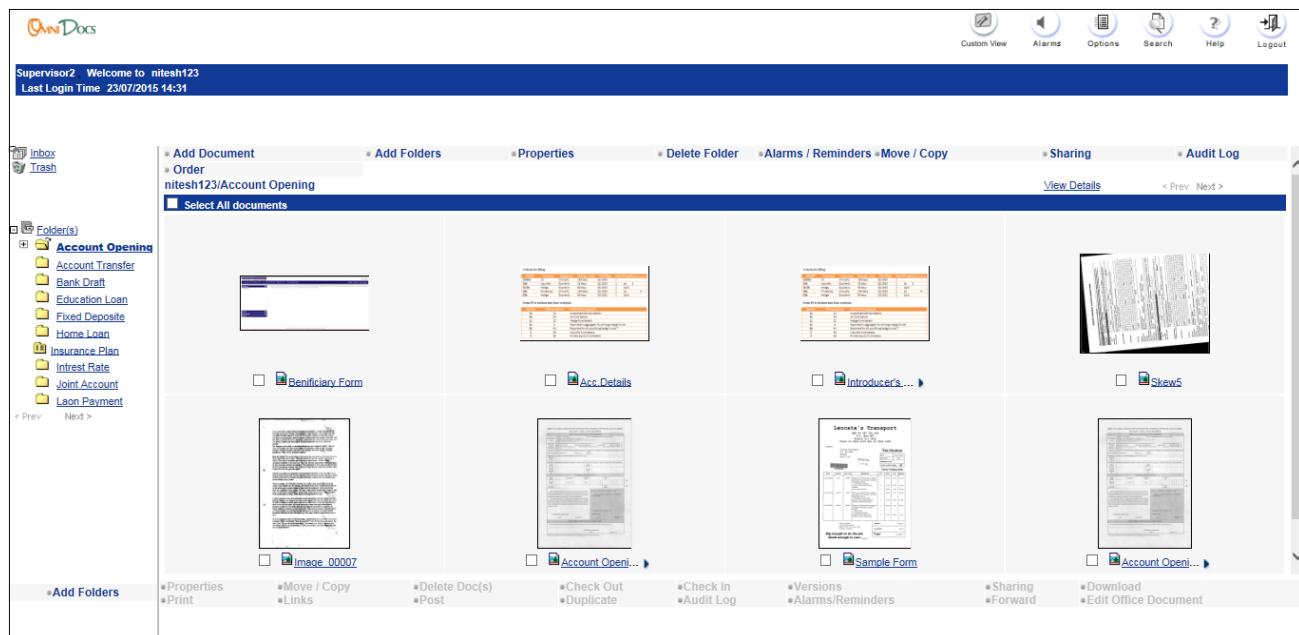


Figure: 2.126

4. Click on any single page document. In document view, click on **Thumbnail View** in the left pane. The thumbnail view appears in the left pane as shown.

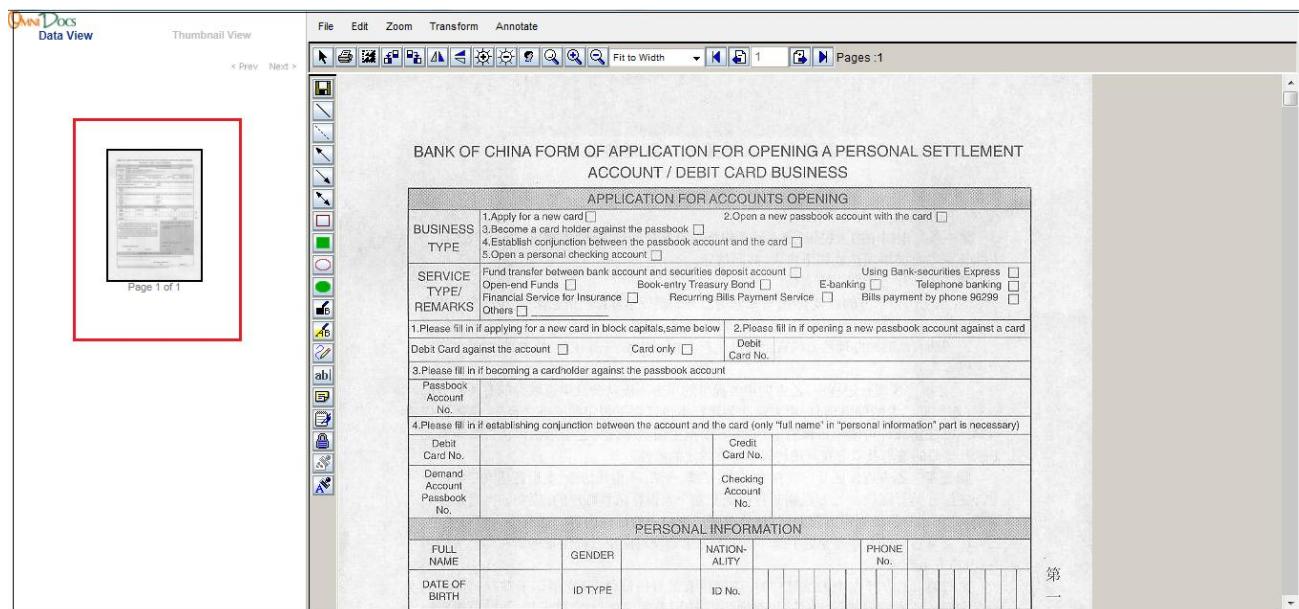


Figure: 2.127

5. Click on any multipage document and go to thumbnail view.

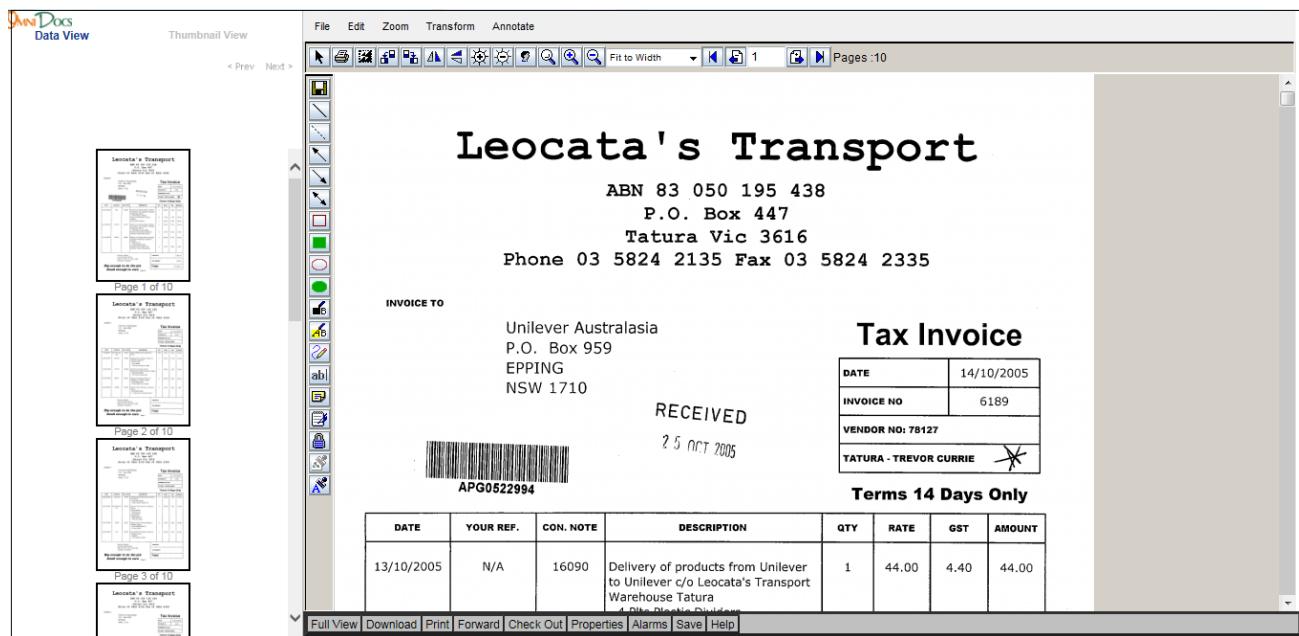


Figure: 2.128

2.6 Working with Documents

A document consists of one or more related pages; the pages can be electronic or scanned.

Following operations can be performed on documents:

- Linking
- Adding
- Duplicating
- Copying / Moving
- Deleting
- Posting
- Downloading
- Viewing Properties
- Checking In

- Checking Out
- Undo Check Out
- Creating Versions
- Sharing
- Viewing Audit Log
- Alarms / Reminders
- Printing Document(s)
- Forwarding Document(s)

NOTE:

Options in the document toolbar are enabled/disabled depending upon the document selected.

2.6.1 Linking Documents

To link a document, follow the following steps

1. Select a document that needs to be linked.
2. Click the **Links** link on the OmniDocs Master desktop.

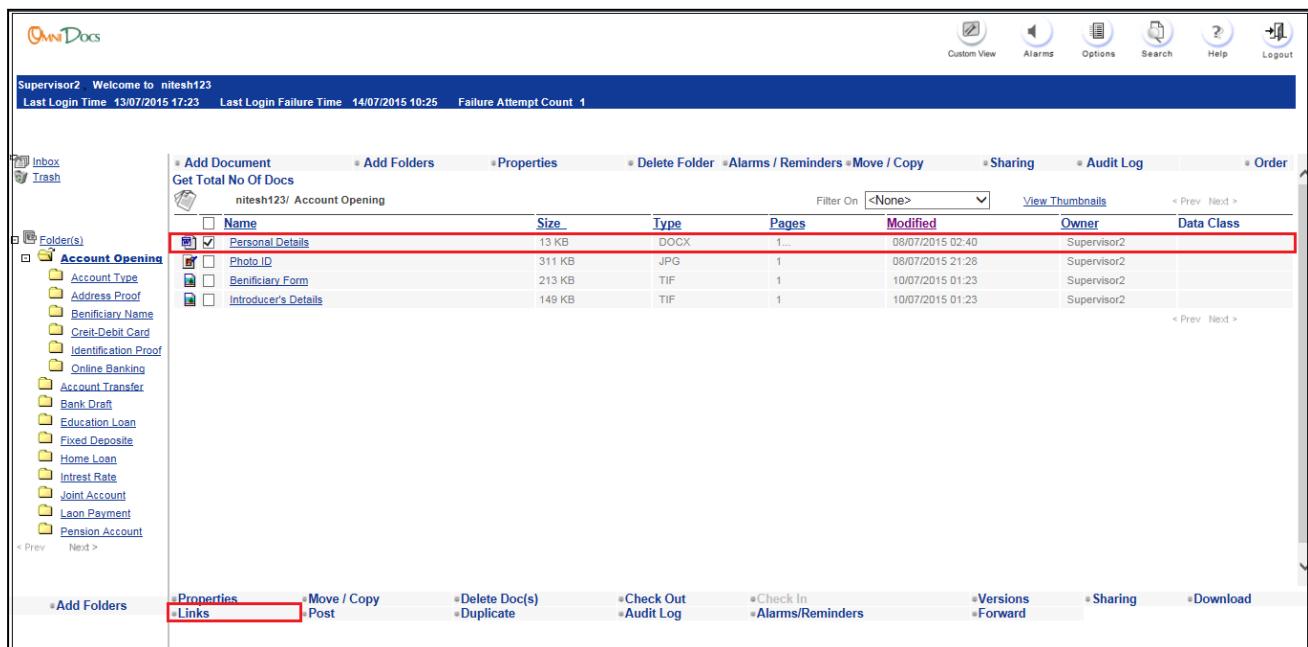


Figure: 2.129

OR

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Click the **Links** link on the OmniDocs Web desktop.

The screenshot shows the OmniDocs Web desktop interface. At the top, there are tabs for "OD Web Desktop" and "MasterDesktop". A welcome message "Hi Supervisor2, Welcome to seq_28apr" is displayed. The top right corner features the OmniDocs logo and links for "Alarms | Options | Help | Logout". On the left, a sidebar titled "Repository" lists "Folder(s)" containing "test" and "nested". The main content area shows a table titled "seq_28apr/test/nested" with columns: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, and Useful Info. Several documents are listed, including "1BitBWG3", "840557490-Proposal_Enclosures_4", "840557490-Proposal_Enclosures_11", "EmployeeID", and "840557490-Proposal_Form". The "Links" option in the context menu on the right is highlighted with a red box. The bottom of the screen includes search, OmniProcess, and Reports links, along with a copyright notice: "Copyright © 2016 Newgen Software Technologies Limited. All rights reserved."

Figure: 2.130

3. The Link Document(s) to screen is appears.
4. To add links to the document, click on **Add** button. Add Links to window gets invoked.

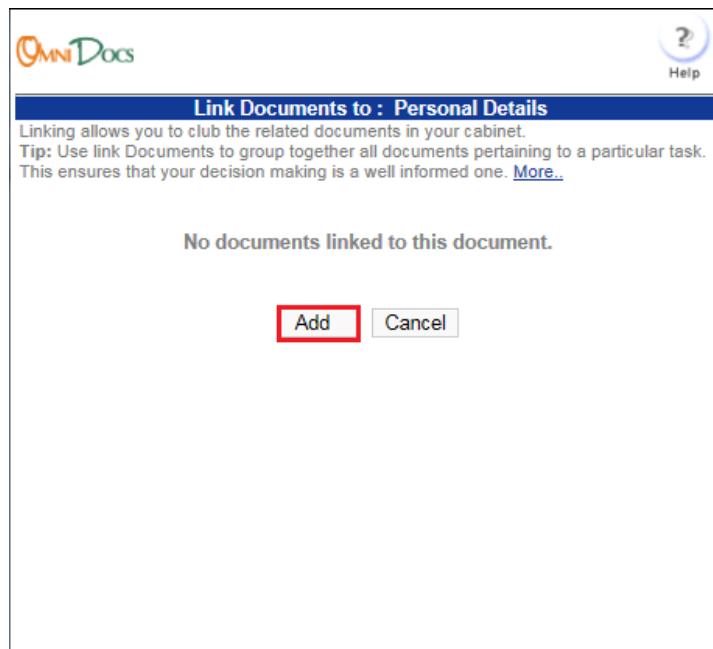


Figure: 2.131

5. Select the **folder** whose document is to be linked from the left-hand side tree view.
6. To view the next batch of folders, click the **Next** option
7. To view the sub folders, click the sign:
8. Select the document that has to be linked.
9. To browse through the next and previous batch of folders click the **Prev** and **Next** links on the left pane.

NOTE:

Prev is disabled for the first batch. **Next** is only activated, if there are more documents in the folder.

10. To close the Link Document screen while saving the changes made click **Link** button.
11. To close the Link Document screen without saving the changes made click **Cancel** button.
12. To remove the links, select the links and click **Remove** button.
13. To close the links window, click **Cancel** button.

2.6.2 Adding Documents

To add a document, follow the following steps:

1. Select a folder from the left pane of the **MasterDesktop** main screen. The Folder information screen appears on the right pane. Click the **Add Documents** link. Refer [Figure:2.132](#)

OR

Select a folder from the left pane of the **WebDesktop** main screen. The Folder information screen appears on the right pane. Click the **Add Documents** link. Refer [Figure:2.133](#).

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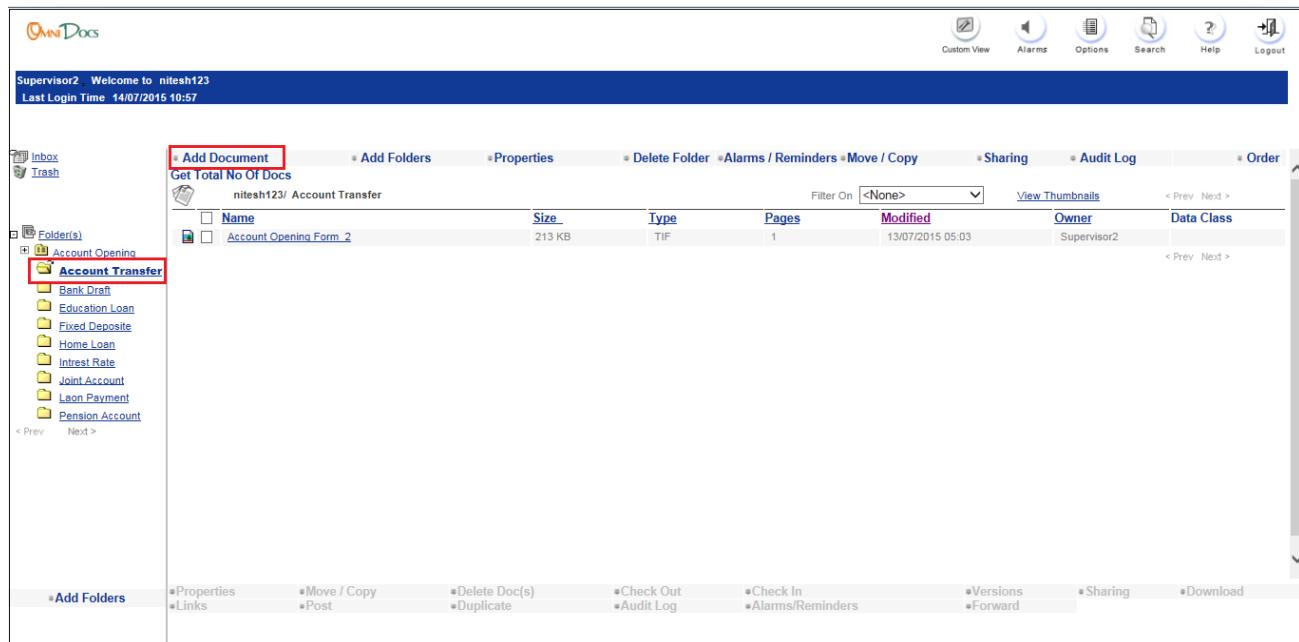


Figure: 2.132

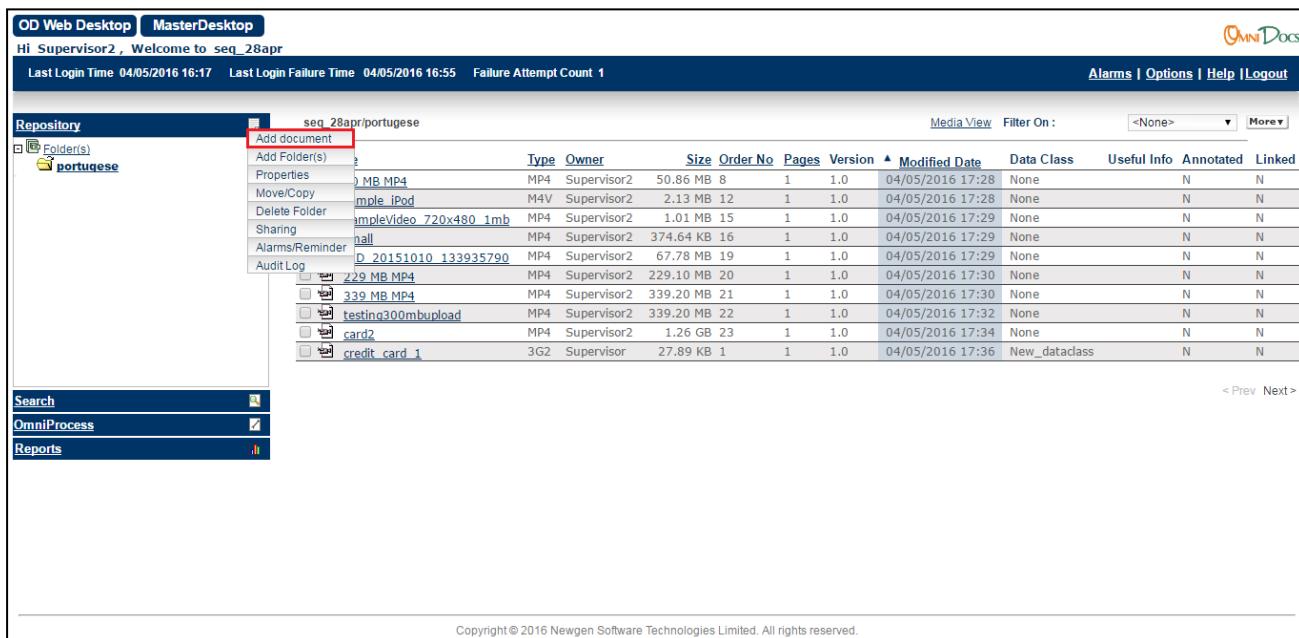


Figure: 2.133

2. The **Add Document** screen appears.
3. Specify the document's full path for adding a document in the **Select File** text box. To browse for the path, click the **Browse** button and choose the required document.
4. Specify a referring name for the document, by which it is displayed in the OmniDocs Desktop in the **Document Name** text box.

5. Document name textbox contains the **default names** of document which is **editable**.

Click on ellipsis button to open pick-list to pick the document name. Double click on any name from pick-list and edit it as per the requirement.

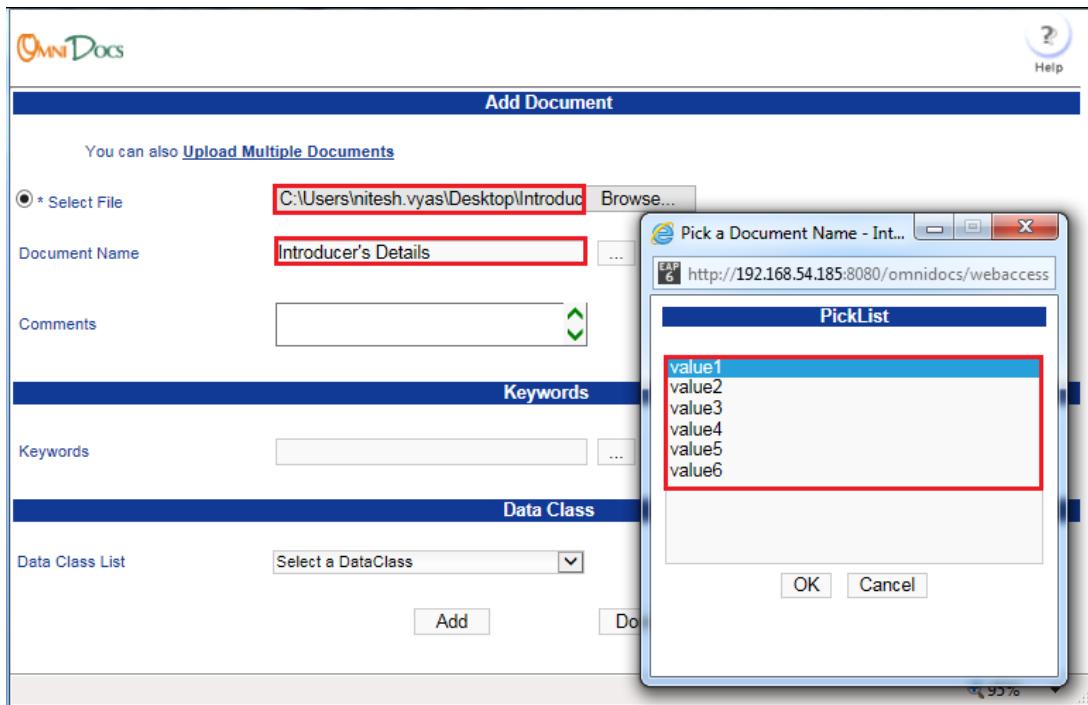


Figure: 2.134

6. Add comments in the **Comments** textbox.
7. Specify **Keywords** for the document. These keywords are helpful for performing search operations. You can add more than one keyword with ‘,’ as a separator.

Working with OmniDocs

The screenshot shows the 'Add Document' page of the OmniDocs software. At the top left is the 'OmniDocs' logo. On the right is a 'Help' button with a question mark icon. The main area has a blue header bar labeled 'Add Document'. Below it, there's a note: 'You can also [Upload Multiple Documents](#)'. A radio button labeled 'Select File' is selected, and a file path 'C:\Users\nitesh.vyas\Desktop\Introduc...' is shown in a text input field with a 'Browse...' button. To its right is a 'Document Name' field containing 'Introducer's Details' with a browse button. Below that is a 'Comments' field containing 'Account transfer Process' with a green checkmark icon. A red rectangular box highlights this comments field. The next section is titled 'Keywords' with a blue header bar. It contains a 'Keywords' field with the value 'Transfer, Account, Customer' enclosed in a red box. A red rectangular box highlights this keywords field. The final section is titled 'Data Class' with a blue header bar. It has a 'Data Class List' dropdown menu showing 'Select a DataClass' with a dropdown arrow. At the bottom are two buttons: 'Add' and 'Done'.

Figure: 2.135

NOTE:

A maximum of **32 characters** can be entered in the Keyword.

8. Select a data class from the; **Data Class List** textbox and fill the respective data class fields.
9. Click **Add** to add the document else click **Cancel**.

Working with OmniDocs

Add Document

You can also [Upload Multiple Documents](#)

* Select File C:\Users\nitesh.vyas\Desktop\Introducer's Details Browse...

Document Name Introducer's Details ...

Comments Account transfer Process

Keywords

Keywords Transfer, Account, Customer ...

Data Class

Data Class List Account Details

Account Number (Number) 20

Account Type (Text) Savings

* IFSC (Number) 07



Figure: 2.136

10. To add multiple documents click the **Upload Multiple Documents** link.

Add Document

You can also [Upload Multiple Documents](#)

* Select File

Document Name ...

Comments

Keywords

Keywords ...

Data Class

Data Class List Select a DataClass

Figure: 2.137

11. The **Upload Multiple Documents** screen appears.
12. Drag and drop the documents to be uploaded in the **Drag and drop** box.
13. The dragged and dropped documents appears in the 'Drag and drop' box
14. Click on document name to **modify** its properties after successful upload.

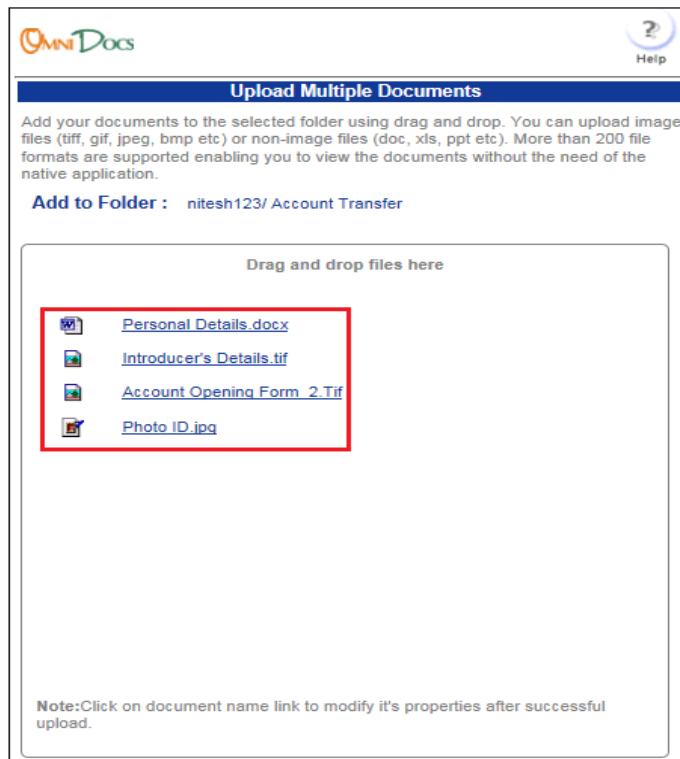


Figure: 2.138

15. Click **Close** button, the documents of "Drag and Drop" box will get upload to the selected folder.
16. You can sort the documents on the basis of **Name, Size, Type, Pages, Modified, Order No** and **Owner**. To sort the documents: click the respective column heading.

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The screenshot shows the OmniDocs Web Desktop interface. At the top, there's a header bar with 'OD Web Desktop' and 'MasterDesktop' buttons, a greeting 'Hi Supervisor2, Welcome to seq_28apr', and a timestamp 'Last Login Time 04/05/2016 16:55'. On the right, there are links for 'Alarms | Options | Help | Logout' and the OmniDocs logo.

The main area has a 'Repository' sidebar on the left containing 'Folder(s)' and 'nested'. The main content area displays a table titled 'seq_28apr/test/nested' with columns: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. The table lists several documents:

Name	Type	Owner	Size	Order No	Pages	Version	Modified Date	Data Class	Useful Info	Annotated	Linked
18tBWG3	TIF	Supervisor2	556.49 KB	1	27	1.0	28/04/2016 13:09	None	N	N	
840557490-Proposal_Enclosures_4	TIF	Supervisor2	20.54 KB	2	1	1.0	28/04/2016 13:09	None	N	N	
840557490-Proposal_Enclosures_11	TIF	Supervisor2	41.67 KB	3	1	1.0	28/04/2016 13:09	None	N	N	
EmployeeID	TIF	Supervisor2	240.77 MB	4	349	1.0	28/04/2016 13:09	None	N	N	
840557490-Proposal_Form	TIF	Supervisor2	517.91 KB	5	8	1.0	28/04/2016 13:10	None	N	N	

At the bottom of the interface, there are links for 'Search', 'OmniProcess', and 'Reports'. A copyright notice at the very bottom reads 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.139

17. Documents are displayed in batches. To view next batch of documents: click the **Next** button

NOTE:

Next button is only activated, if the number of documents in a folder is greater than the defined batch.

18. To view the previous batch of documents, click **Prev** button.

2.6.3 Duplicating Documents

To duplicate a document, follow the following steps:

1. Select the document that has to be duplicated, and then click the **Duplicate** link.

The screenshot shows the OmniDocs Web Desktop interface. At the top, it displays 'OD Web Desktop' and 'MasterDesktop', with a greeting 'Hi Supervisor2, Welcome to seq_28apr' and a 'Last Login Time 04/05/2016 16:55'. On the left, there's a 'Repository' sidebar with 'Folder(s)' containing 'test' and 'nested'. The main area shows a list of files under 'seq_28apr/test/nested'. One file, '1BitBWG3', is selected and highlighted with a red border. A context menu is open on this file, with the 'Duplicate' option also highlighted in red. Other options in the menu include 'Move/Copy', 'DeleteDoc(s)', 'Check Out', 'Versions', 'Sharing', 'Download', 'Links', 'Post', 'AuditLog', 'Alarms/Reminders', and 'Forward'. At the bottom of the screen, there's a copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.140

OR

This screenshot shows another view of the OmniDocs Web Desktop interface. It features a navigation bar with 'Inbox' and 'Trash' icons, and a top menu with links like 'Add Document', 'Add Folders', 'Properties', 'Delete Folder', 'Alarms / Reminders', 'Move / Copy', 'Sharing', 'Audit Log', and 'Order'. The main content area displays a list of documents under 'nitesh123/ Account Transfer'. One document, 'Photo ID', is selected and highlighted with a red border. A context menu is open on this document, with the 'Duplicate' option highlighted in red. Other options in the menu include 'View Thumbnails', 'Filter On' (set to '<None>'), 'Owner', 'Data Class', and 'Audit Log'. At the bottom, there are various management links: 'Add Folders', 'Properties', 'Move / Copy', 'Delete Doc(s)', 'Duplicate', 'Check Out', 'Check In', 'Versions', 'Sharing', and 'Download'. The 'Delete Doc(s)' and 'Duplicate' buttons are specifically highlighted with red boxes.

Figure: 2.141

2. The **Duplicate Document** screen appears.
3. Click **Duplicate** to duplicate the document, else click **Close** to close the window.

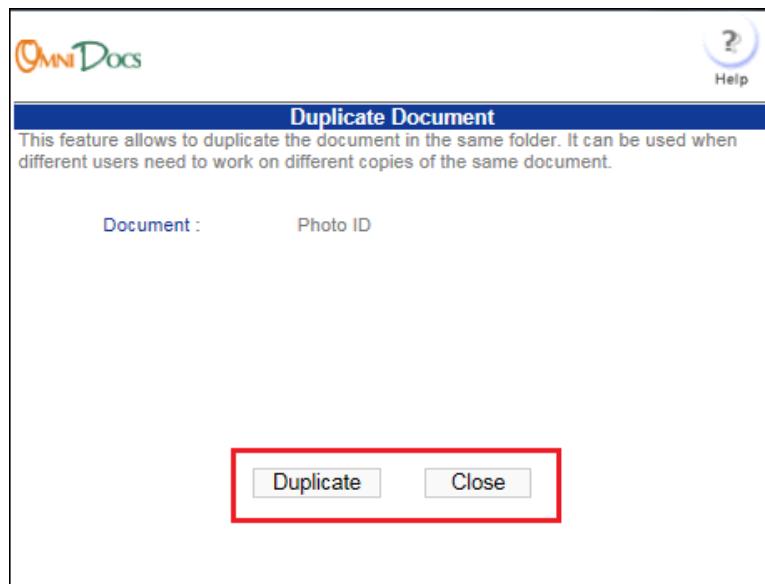


Figure: 2.142

2.6.4 Moving/Copying Documents

To **move/copy** documents from one folder to another, follow the following steps:

1. Select the document that has to be “copied/ moved”, click the **Move / Copy** link.

Name	Size	Type	Pages	Modified	Owner	Data Class
Account Opening Form_2	213 KB	TIF	1	13/07/2015 05:03	Supervisor2	
Personal Details	13 KB	DOCX	1...	13/07/2015 23:37	Supervisor2	
Introducer's Details	149 KB	TIF	1	13/07/2015 23:37	Supervisor2	
Account Opening Form_2	213 KB	TIF	1	13/07/2015 23:37	Supervisor2	
Photo ID	311 KB	JPG	1	13/07/2015 23:37	Supervisor2	

Figure: 2.143

OR

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The screenshot shows the OmniDocs Web Desktop interface. At the top, there's a header bar with the text "OD Web Desktop MasterDesktop", "Hi Supervisor2, Welcome to seq_28apr", "Last Login Time 04/05/2016 16:55", and the "OmniDocs" logo. Below the header is a navigation bar with links for "Alarms", "Options", "Help", and "Logout". The main area is titled "Repository" and shows a tree view with "Folders(s)" expanded, revealing "test" and "nested". Under "nested", there are several documents listed in a table:

Name	Type	Owner	Size	Order No.	Pages	Version	Modified Date	Data Class	Useful Info
<input checked="" type="checkbox"/> 1BitBWG3	TIF	Supervisor2	556.49 KB	1	27	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> 840557490-Proposal_Enclosures_4	TIF	Supervisor2	20.54 KB	2	1	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> 840557490-Proposal_Enclosures_11	TIF	Supervisor2	41.67 KB	3	1	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> EmployeeID	TIF	Supervisor2	240.77 MB	4	349	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> 840557490-Proposal_Form	TIF	Supervisor2	517.91 KB	5	8	1.0	28/04/2016 13:10	None	

On the right side of the table, there's a "More" dropdown menu with various options: Properties, Move/Copy, DeleteDoc(s), Check Out, Versions, Sharing, Download, Links, Post, Duplicate, AuditLog, Alarms/Reminders, and Forward. The "Move/Copy" option is highlighted with a red box. At the bottom of the interface, there are search and report links, and a copyright notice: "Copyright © 2016 Newgen Software Technologies Limited. All rights reserved."

Figure: 2.144

2. The **Move / Copy Document** screen appears.
3. The name of the selected document that has to be moved/copied is displayed.

The screenshot shows the "Move / Copy Document" dialog box. At the top, there's a "Help" link. The main title is "Move / Copy Document". Below the title, there's a brief instruction: "Create a copy of this document or move this document to any other folder in your cabinet. Browse to the target folder for the Move/Copy and click at the Move or the Copy button. Also, you can create a shortcut to this document in any folder. [More](#)". There's also a tip: "Tip: Use shortcuts to keep a collection of your favorite, or most frequently used documents." The "Name" field is highlighted with a red box and contains the value "Documents : Photo ID". Below it, there are two fields: "From Folder" set to "Account+Transfer" and "Select Folder" set to "<Select Folder>". At the bottom, there are four buttons: "Move", "Copy", "Create Shortcut", and "Cancel".

Figure: 2.145

4. Select the folder where the document has to be moved/ copied from the **Select Folder** link.

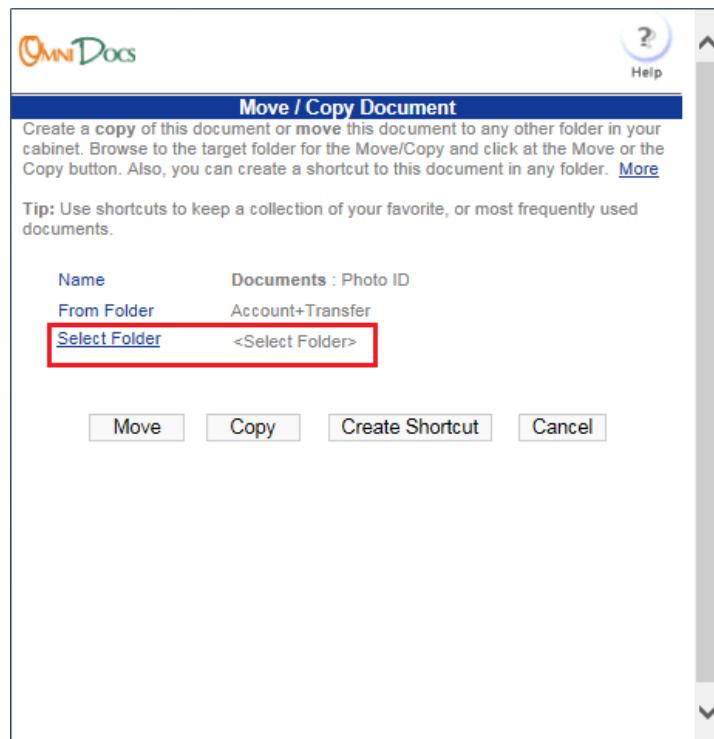


Figure: 2.146

5. The **Select Folder** screen appears. Select the folder, and Click the **OK** button to set the destination folder, else click the **Cancel** button.

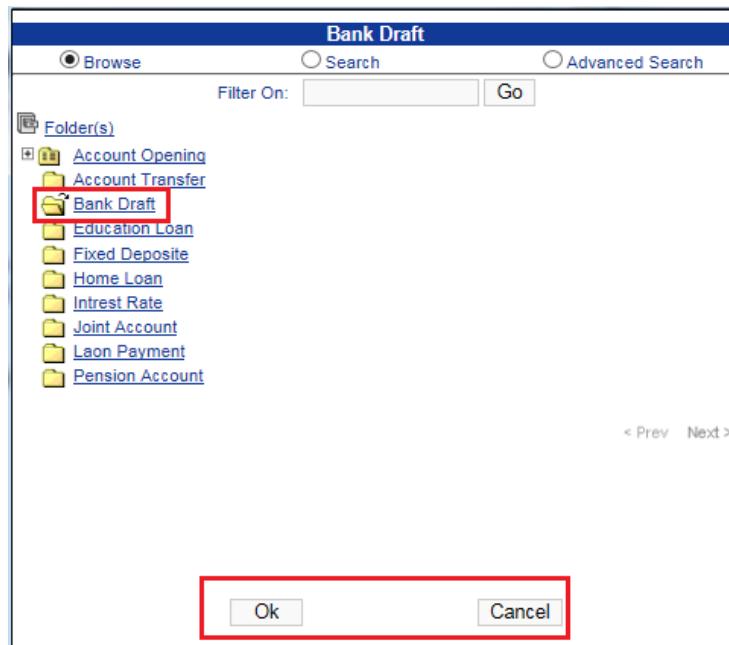


Figure: 2.147

6. Click **Move** button to move the document in to selected folder.
7. Click **Copy** button to copy the document in to selected folder.
8. Click **Create Shortcut** button to create a shortcut of the selected document.
9. Click **Cancel** button to close the **Move/Copy Document** screen.

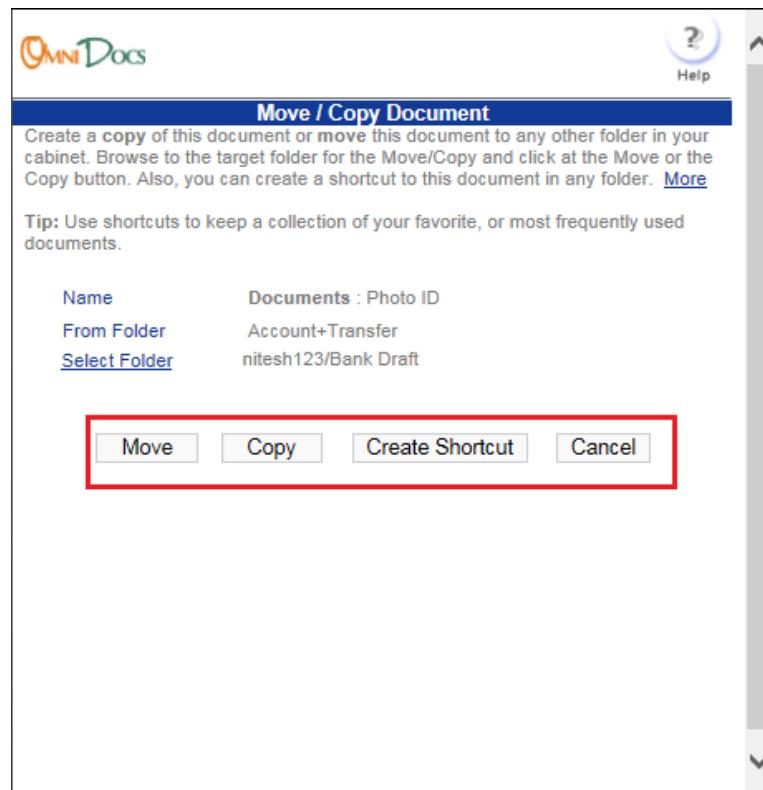


Figure: 2.148

NOTE:

If the command button Create Shortcut is clicked, it signifies that the document's shortcut is created in the selected folder

2.6.5 Deleting documents

To delete documents, follow the following steps:

1. Select the documents that have to be deleted, click the **Delete** link on the desktop.

Working with OmniDocs

The screenshot shows the OmniDocs web interface. At the top, there's a header bar with 'OD Web Desktop' and 'MasterDesktop'. Below it, a message says 'Hi Supervisor2, Welcome to seq_28apr' and 'Last Login Time 04/05/2016 16:55'. On the right, there are links for 'Alarms | Options | Help | Logout'. The main area has a 'Repository' sidebar with 'Folder(s)' and 'test' expanded, showing 'nested'. The main content area displays a list of files under 'seq_28apr/test/nested'. One file, '18tBWG3', is selected and highlighted with a red border. A context menu is open over this file, with the 'DeleteDoc(s)' option also highlighted with a red border. Other options in the menu include 'Properties', 'Move/Copy', 'Check Out', 'Versions', 'Sharing', 'Download', 'Links', 'Post', 'Duplicate', 'AuditLog', 'Alarms/Reminders', and 'Forward'. The bottom of the screen shows a footer with 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.149

This screenshot shows the OmniDocs interface for a specific user ('nitesh123'). The top bar includes 'OmniDocs', 'Custom View', 'Alarms', 'Options', 'Search', 'Help', and 'Logout'. The header shows 'Supervisor2 Welcome to nitesh123' and 'Last Login Time 14/07/2015 14:00 Last Login Failure Time 14/07/2015 14:33 Failure Attempt Count 1'. The left sidebar shows a tree view of 'Folder(s)' containing 'Account Opening', 'Account Transfer', 'Bank Draft', 'Education Loan', 'Fixed Deposite', 'Home Loan', 'Interest Rate', 'Joint Account', 'Loan Payment', and 'Pension Account'. The main content area shows a list of documents in 'Account Transfer' with one document, 'Personal Details', selected and highlighted with a red border. A context menu is open over this document, with the 'Delete Doc(s)' option highlighted with a red border. Other options in the menu include 'Add Document', 'Add Folders', 'Properties', 'Delete Folder', 'Alarms / Reminders', 'Move / Copy', 'Sharing', 'Audit Log', and 'Order'. The bottom of the screen shows a footer with links for 'Add Folders', 'Properties', 'Links', 'Move / Copy', 'Post', 'Delete Doc(s)', 'Check Out', 'Duplicate', 'Check In', 'Audit Log', 'Alarms/Reminders', 'Versions', 'Forward', 'Sharing', and 'Download'.

Figure: 2.150

2. A message box is invoked prompting for moving the selected document to the Trash.
3. To move the selected document to the trash: click the **OK** button or else click the **Cancel** button.

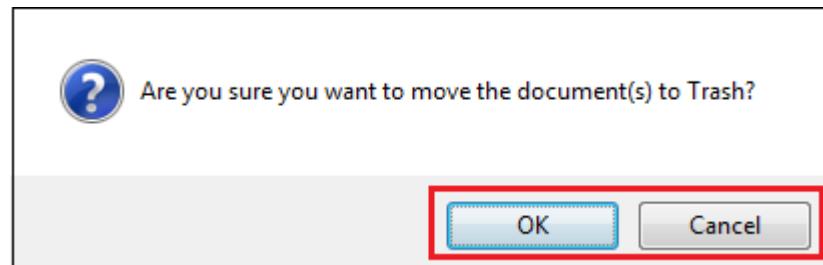


Figure: 2.151

2.6.6 Posting of Documents

In order to **Post** Document(s), follow the following steps:

1. Select the required document(s) and click the **Post** link.

Name	Size	Type	Pages	Modified	Owner	Data Class
Account Opening Form_2	213 KB	TIF	1...	13/07/2015 05:03	Supervisor2	
Personal Details	13 KB	DOCX	1...	13/07/2015 23:37	Supervisor2	
Introducer's Details	149 KB	TIF	1	13/07/2015 23:37	Supervisor2	
Account Opening Form_2	213 KB	TIF	1	13/07/2015 23:37	Supervisor2	
Photo ID	311 KB	JPG	1	13/07/2015 23:37	Supervisor2	

Figure: 2.152

OR

Working with OmniDocs

The screenshot shows the OmniDocs Web Desktop interface. At the top, there's a header bar with tabs for 'OD Web Desktop' and 'MasterDesktop', and a message 'Hi Supervisor2, Welcome to seq_28apr'. The main area displays a list of documents in a table with columns: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, and Useful Info. One row is selected, and a context menu is open on the right side, with the 'Post' option highlighted.

Name	Type	Owner	Size	Order No	Pages	Version	Modified Date	Data Class	Useful Info
<input checked="" type="checkbox"/> 18tBWG3	TIF	Supervisor2	556.49 KB	1	27	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> 840557490-Proposal_Enclosures_4	TIF	Supervisor2	20.54 KB	2	1	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> 840557490-Proposal_Enclosures_11	TIF	Supervisor2	41.67 KB	3	1	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> EmployeeID	TIF	Supervisor2	240.77 MB	4	349	1.0	28/04/2016 13:09	None	
<input type="checkbox"/> 840557490-Proposal_Form	TIF	Supervisor2	517.91 KB	5	8	1.0	28/04/2016 13:10	None	

Below the table, there are links for 'Search', 'OmniProcess', and 'Reports'. A copyright notice at the bottom states 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.153

2. The **Post Document(s)** screen appears displaying the **name of the cabinet**, **document name**, and the **name of a person** to whom you would like to post the selected document.
3. To post the selected document to another person, select the user from '**To**' combo box.

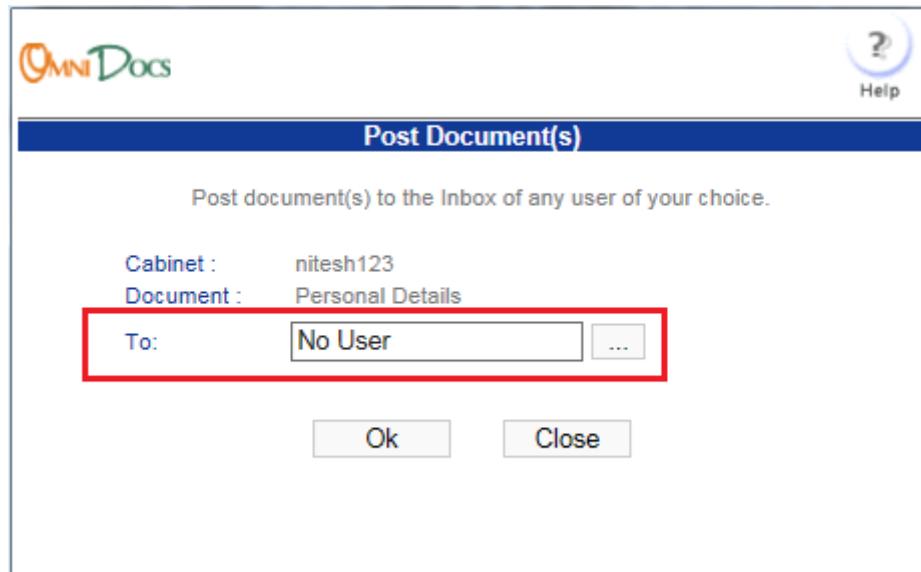


Figure: 2.154

4. The '**To**' combo box consists of names of the users connected to the cabinet.

5. Select the specific user and click **Done**.

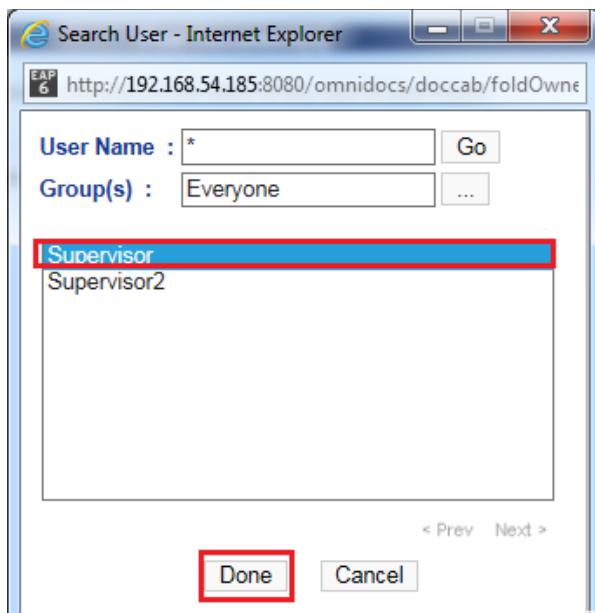


Figure: 2.155

6. The selected user displayed in the 'To' combo box Click the **Ok** button to save the changes made.

Else, click **Close** button to close Post Document(s) screen without saving the changes.

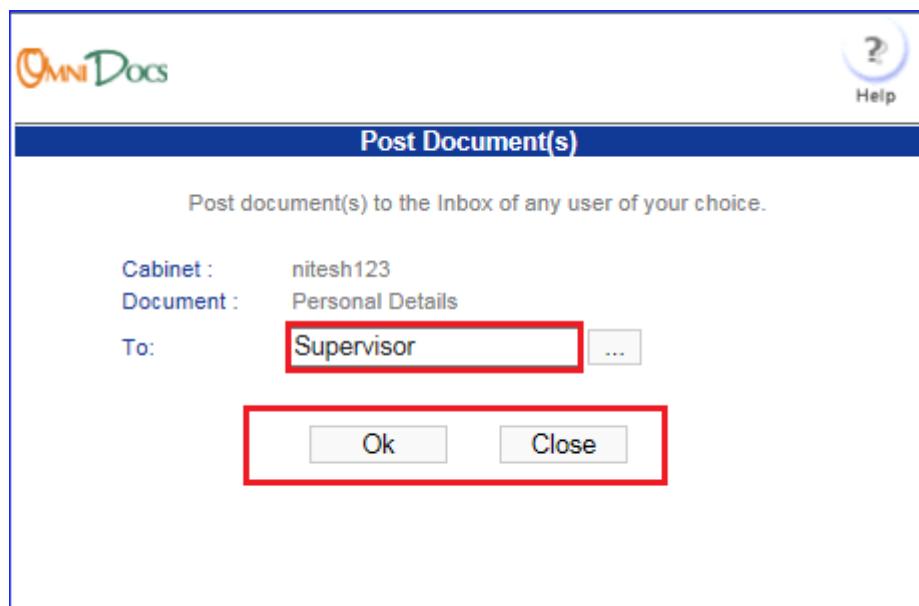


Figure: 2.156

NOTE:

- The documents which are not in a Checked-out mode can only be posted.
 - The **Supervisor** or the **Owner** of the document can only post the document.
-

2.6.7 Downloading Document

To download a document(s), follow the following steps:

1. Select the document and Click the **Download** link from the desktop.

The screenshot shows the OmniDocs interface with a repository view. A list of documents is displayed, including '1BitBWG3', '840557490-Proposal_Enclosures_4', '840557490-Proposal_Enclosures_11', 'EmployeeID', and '840557490-Proposal_Form'. The '1BitBWG3' document is selected, and its details are shown in the right panel. A context menu is open over the selected document, with the 'Download' option highlighted.

Figure: 2.157

OR

The screenshot shows the OmniDocs interface with a repository view. A list of documents is displayed, including 'Account Opening Form_2', 'Personal Details', 'Introducer's Details', 'Account Opening Form_2', and 'Photo ID'. The 'Introducer's Details' document is selected, and its details are shown in the right panel. A context menu is open over the selected document, with the 'Download' option highlighted.

Figure: 2.158

Working with OmniDocs

2. You can open the file directly from the current location, by selecting the **Open** button. The file will get open in its native application.
3. Click the **Cancel** button to close the File Download screen without saving the changes made.
4. You can save the selected file into the hard disk by clicking the **Save** button.

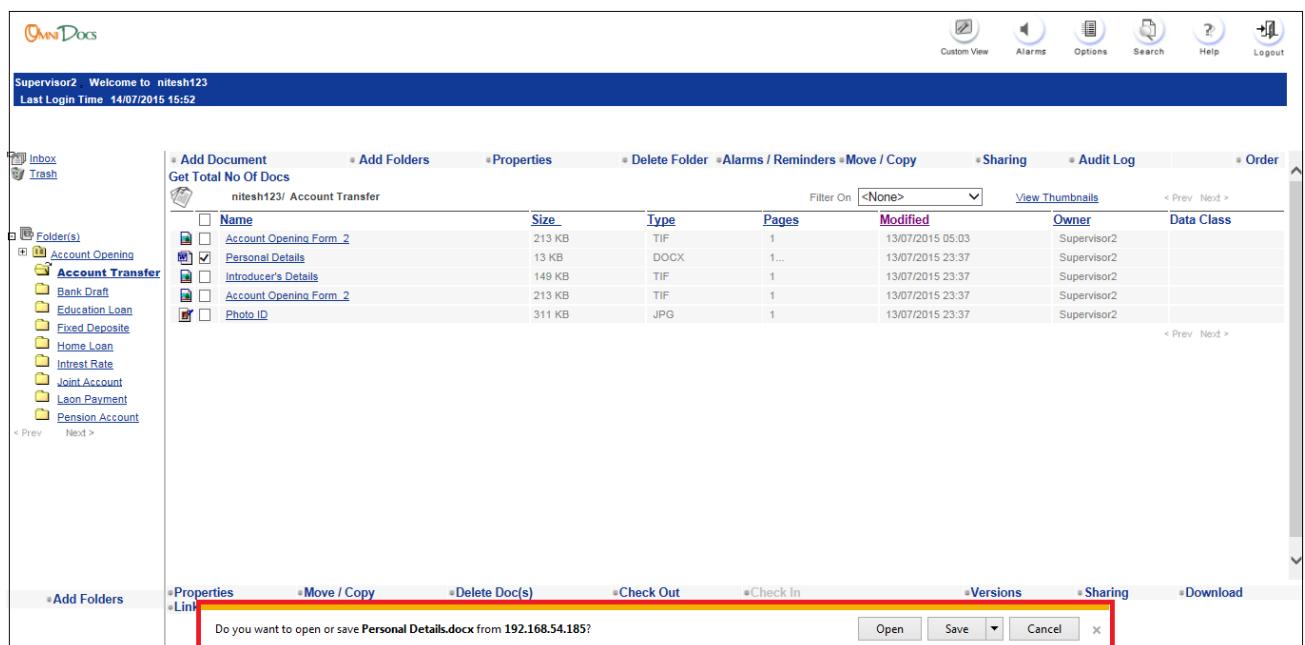


Figure: 2.159

NOTE:

Blank Documents do not get downloaded.

2.6.8 Viewing Document Properties

To view the document properties, follow the following steps:

1. Select the required document and then click the **Properties** link.

The screenshot shows the OmniDocs web desktop interface. At the top, there's a header bar with 'OD Web Desktop' and 'MasterDesktop'. Below it, a message says 'Hi Supervisor2, Welcome to seq_28apr' and 'Last Login Time 04/05/2016 16:55'. On the left, a sidebar shows a 'Repository' tree with 'Folder(s)', 'test', and 'nested'. The main area displays a table titled 'seq_28apr/test/nested' with columns: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, and Actions. One row, '18tBWG3', has a checked checkbox and is highlighted with a red box. A context menu is open on the right, with 'Properties' also highlighted with a red box. At the bottom, there's a footer with 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.160

This screenshot shows the OmniDocs interface for a user named 'nitesh123'. The top bar includes 'OmniDocs', 'Custom View', 'Alarms', 'Options', 'Search', 'Help', and 'Logout'. The main area shows a 'nitesh123/ Account Transfer' folder with a table of documents. One document, 'Personal Details', is selected and highlighted with a red box. A context menu is open on the right, with 'Properties' also highlighted with a red box. The table columns are Name, Size, Type, Pages, Modified, Owner, and Data Class. At the bottom, there are various management links like 'Add Document', 'Add Folders', 'Properties', etc., some of which are also highlighted with red boxes.

Figure: 2.161

2. The **Document Properties** screen appears. The Document Properties dialog box has three tabs- **General**, **Data Class** and **Global Index**. By default “General” tab appears selected.

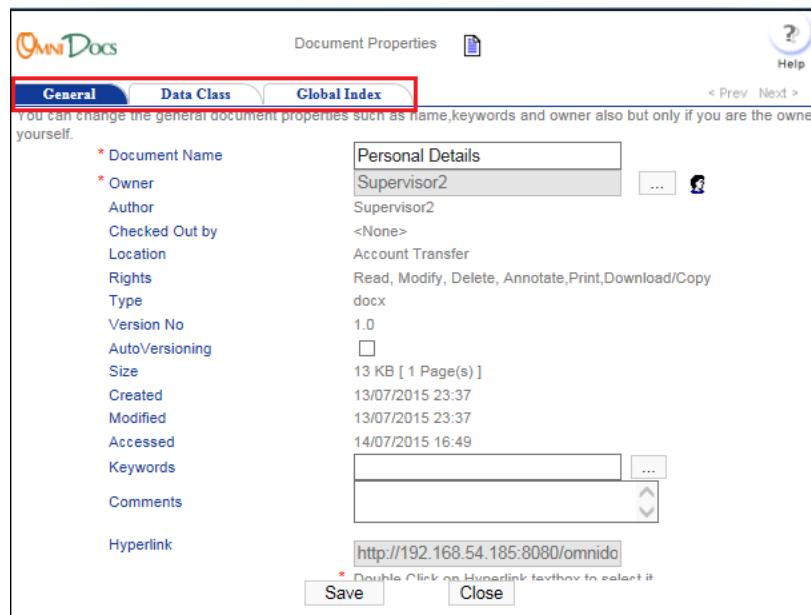


Figure: 2.162

3. General properties includes the ‘Document Name’, ‘Owner’, ‘Author’, ‘Checked out by’, ‘Location’, ‘Rights’, ‘Type’, ‘Version No.’, ‘Auto Versioning’, ‘Size’, ‘Created’, ‘Modified’, ‘Accessed’, ‘Keywords’, ‘Comments’ and ‘Hyperlink’ feature.

Working with OmniDocs

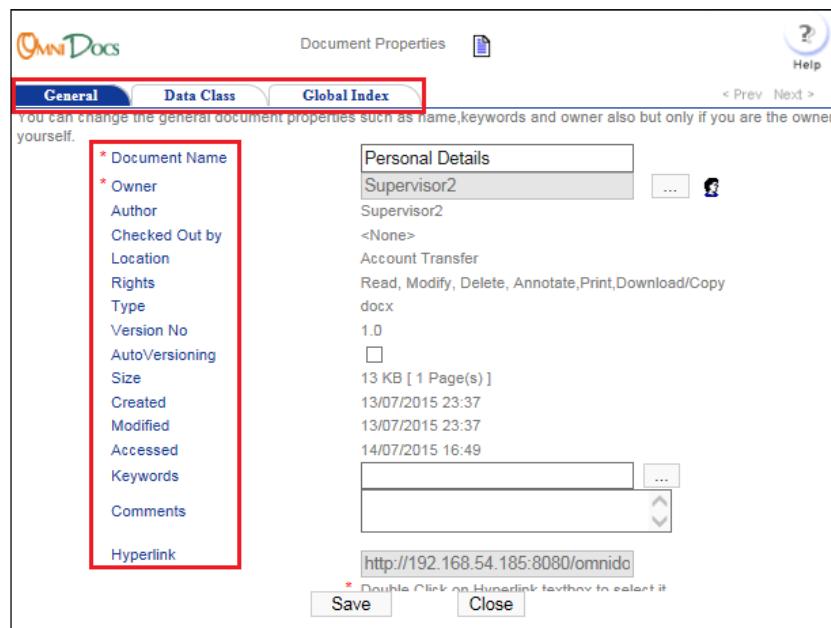


Figure: 2.163

4. To change the name of the document, specify the new name in the **Document** text box.

Click the **Save** button.

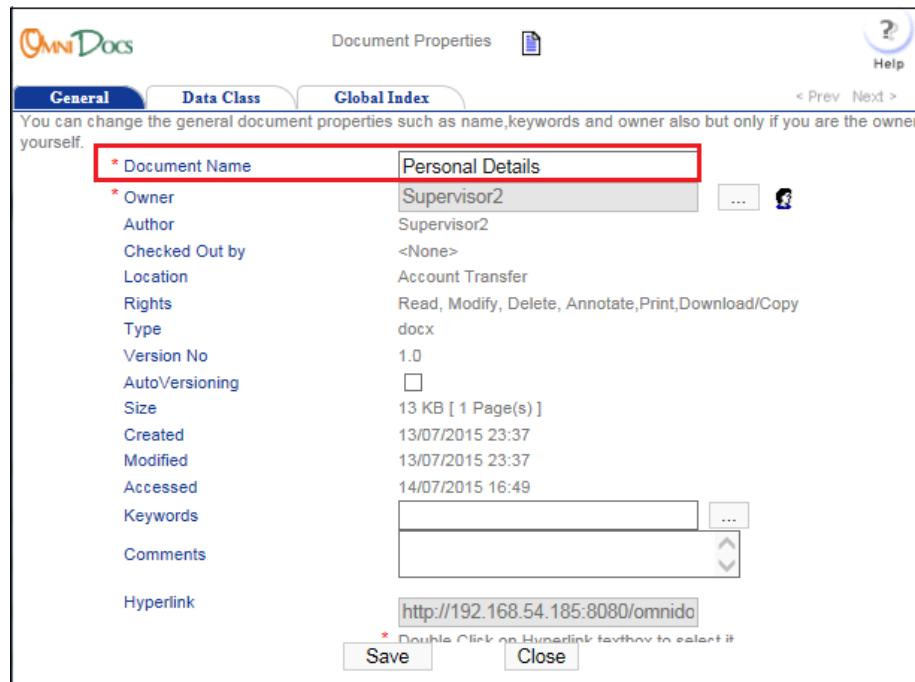


Figure: 2.164

5. To change the owner of the selected folder, click the ellipsis button besides **Owner** textbox. A **search user** window gets pop-up, Click **Done** to select name of the new owner from the pop- up window.

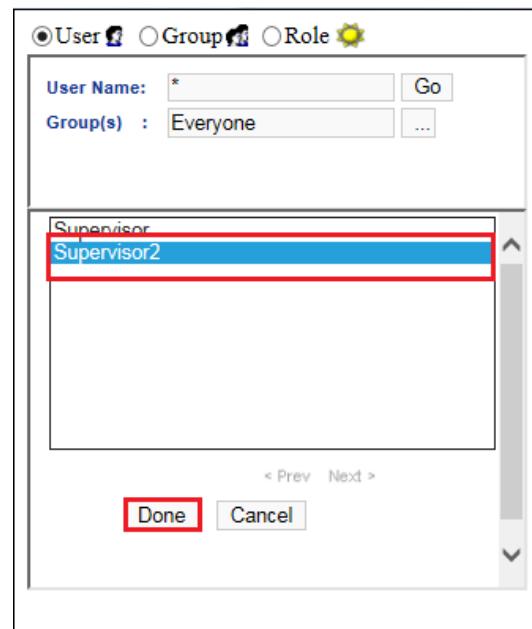


Figure: 2.165

6. The selected owner name is displayed **Owner** text box.
7. Specify the keywords in the **Keywords** textbox.
8. Specify the comments that have to be attached with the specific document, in the **Comments** text box

NOTE:

A maximum of **255 characters** can be entered for comments

Working with OmniDocs

The screenshot shows the 'Document Properties' interface for a document named 'Personal Details'. The 'General' tab is selected. Key fields shown include:

- * Document Name: Personal Details
- * Owner: Supervisor2
- Author: Supervisor2
- Checked Out by: <None>
- Location: Account Transfer
- Rights: Read, Modify, Delete, Annotate, Print, Download/Copy
- Type: docx
- Version No: 1.0
- AutoVersioning:
- Size: 13 KB [1 Page(s)]
- Created: 13/07/2015 23:37
- Modified: 13/07/2015 23:37
- Accessed: 14/07/2015 17:00
- Keywords:** Personal, Information, Details
- Comments:** Personal Information of the customer.

At the bottom, there is a 'Hyperlink' field containing the URL <http://192.168.54.185:8080/omnidoc>. A note says: '* Double Click on Hyperlink textbox to select it.' There are 'Save' and 'Close' buttons at the bottom.

Figure: 2.166

9. To view the data class attached to the document, click **Data Class** tab. The Data Class screen appears.
10. Select the data class by clicking **Change** button.

The screenshot shows the 'Document Properties' interface with the 'Data Class' tab selected. Key fields shown include:

- Data Class: No Data Class is associated
- Change button (highlighted with a red box)

At the bottom, there are 'Save' and 'Close' buttons.

Figure: 2.167

11. The associated **data indexes** of the selected data class are displayed
12. Specify the value of the **data index** in their respective fields.
13. Click **Save**, to save the changes else click **Close**.

The screenshot shows the 'Data Class' tab of the 'Document Properties' dialog in OmniDocs. The 'General' tab is also visible. A tip message at the top says: 'You can associate data class and specify values to the fields. These fields will serve as additional application specific information for this document. Tip: Use this feature to efficiently categorize documents of one kind and to aid in more accurate searches.' Below this, there are three data entry fields:

Account Number	(Number)*	15
Account Type	(Text)*	Saving
IFSC	(Number)*	20

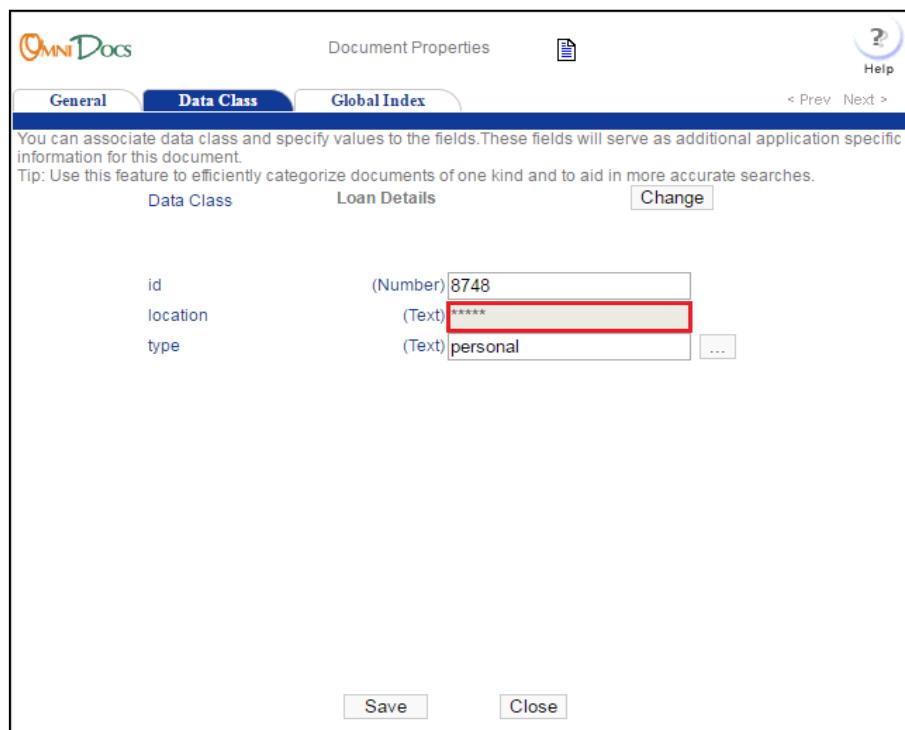
At the bottom right are 'Save' and 'Close' buttons, both of which are highlighted with red boxes.

Figure: 2.168

NOTE:

If **Data Security Functionality** checkbox is selected in the OmniDocs – Admin Home screen, and required “**View Data Security**” privileges and “**View Secured Data**” rights are not provided to any User. That particular User, in that case, won’t be able to view the Secured Data. In such condition, the user will have the following restricted view of the DataClass values.

However, if required rights are provided to the user, then that user can have the normal view of the DataClass values.



The screenshot shows the 'Data Class' tab of the 'Document Properties' dialog box. The 'General' tab is also visible. A note at the top states: 'You can associate data class and specify values to the fields. These fields will serve as additional application specific information for this document.' A tip below it says: 'Tip: Use this feature to efficiently categorize documents of one kind and to aid in more accurate searches.' The 'Data Class' dropdown is set to 'Loan Details'. There are three data entries: 'id' with value '8748', 'location' with value '*****' (redacted), and 'type' with value 'personal'. A 'Change' button is next to the dropdown. At the bottom are 'Save' and 'Close' buttons.

14. To add global indexes, click **Global Index** tab.
15. Select the global index from the **Global Indexes** drop down list. Click **Add** button.
16. Specify the value of the Global Index in the Global Indexes textbox.

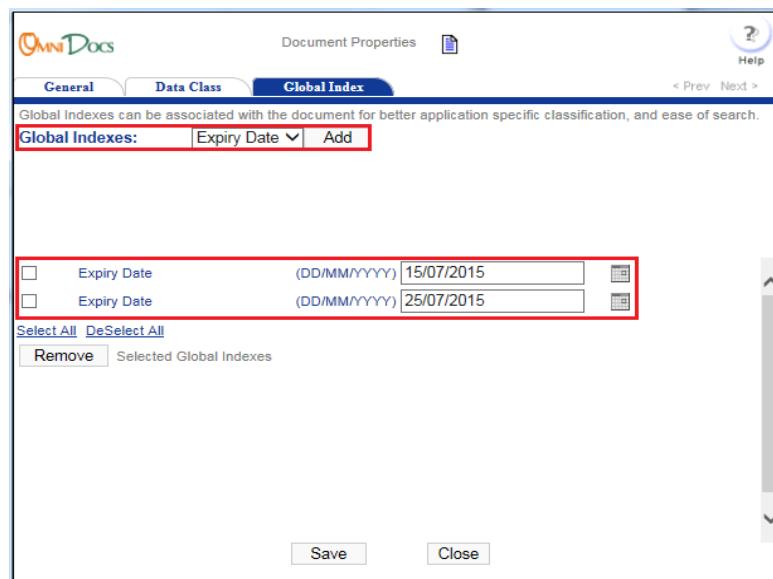
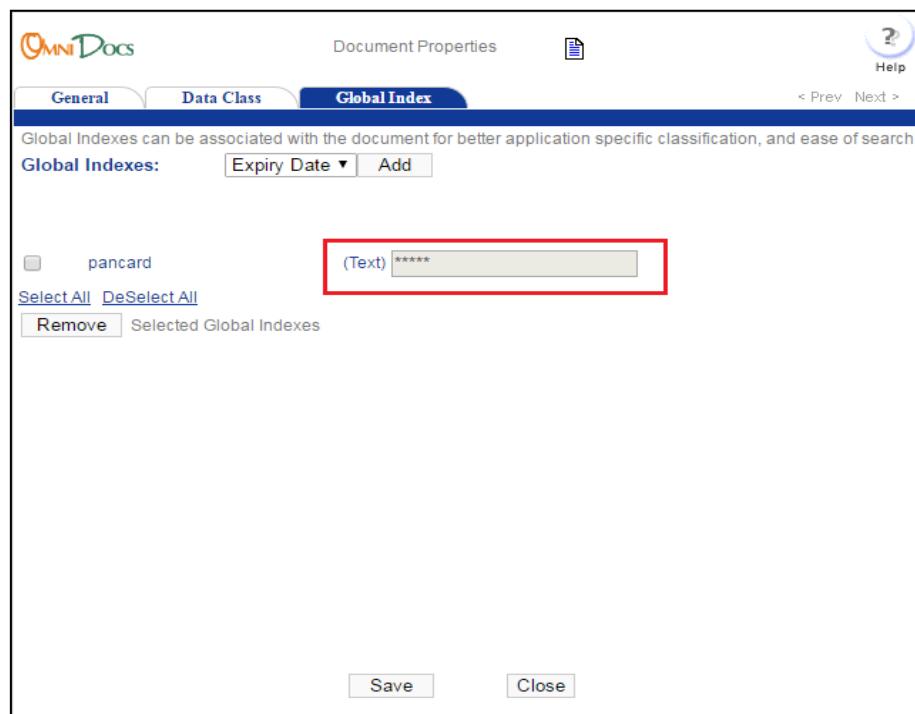


Figure: 2.169

NOTE:

If **Data Security Functionality** checkbox is selected in the OmniDocs – Admin Home screen, and required “**View Data Security**” rights and “**View Secured Data**” privileges are not provided to any User. That particular User, in that case, won’t be able to view the Secured Data. In such condition, the user will have the following restricted view of the Global Index values.

However, if required rights are provided to the user, then that user can have the normal view of the Global Index values.



To remove Global Index:

NOTE:

Only those users, who can view the data, can then remove global index from the selected document.

1. Click **Select All** link to select the Global Indexes. Click **Remove** button.
2. All the selected indexes are removed.
3. To de-Select the selected indexes click the **DeSelect All** link.

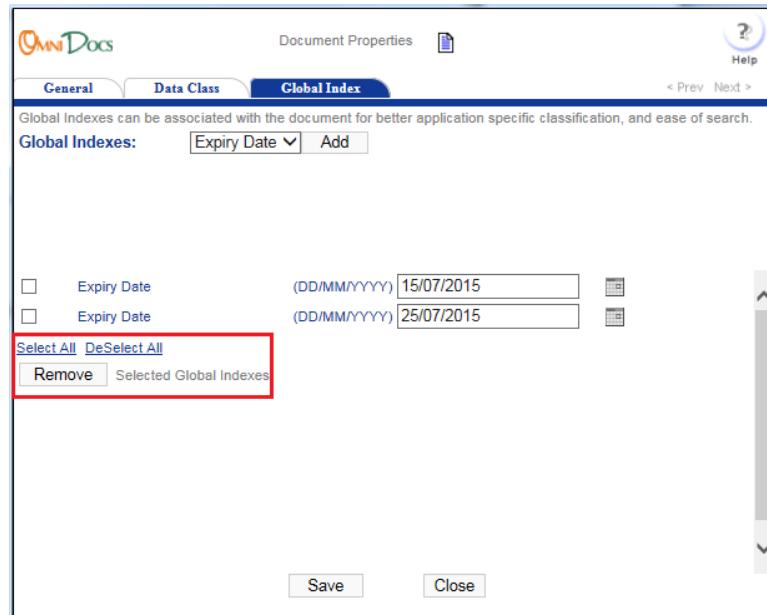


Figure: 2.170

2.6.9 Sharing of Documents

To Share Document(s) follow the following steps:

1. Select the required document and then click the **Sharing** link.

Working with OmniDocs

The screenshot shows the OmniDocs web interface. At the top, there's a header bar with the title 'OD Web Desktop MasterDesktop', a greeting 'Hi Supervisor2, Welcome to seq_28apr', and a timestamp 'Last Login Time 04/05/2016 16:55'. On the right side of the header is the 'OmniDocs' logo. Below the header is a navigation bar with links for 'Alarms | Options | Help | Logout'. The main content area is titled 'Repository' and shows a tree view of folders: 'Folder(s)', 'test', and 'nested'. Under 'nested', there are several documents listed in a table: '1BitBWG3' (TIF, 556.49 KB, 1 page, 27 modified, 1.0 version), '840557490-Proposal Enclosures_4' (TIF, 20.54 KB, 2 pages, 1 modified, 1.0 version), '840557490-Proposal Enclosures_11' (TIF, 41.67 KB, 3 pages, 1 modified, 1.0 version), 'EmployeeID' (TIF, 240.77 MB, 4 pages, 349 modified, 1.0 version), and '840557490-Proposal Form' (TIF, 517.91 KB, 5 pages, 8 modified, 1.0 version). To the right of the table is a context menu with options like 'Properties', 'Move/Copy', 'Delete Doc(s)', 'Check Out', 'Versions', 'Sharing', 'Download', 'Links', 'Post', 'Duplicate', 'Audit Log', 'Alarms/Reminders', and 'Forward'. The 'Sharing' option is highlighted with a red box. At the bottom of the interface, there are search and report links, and a copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.171

OR

This screenshot shows another view of the OmniDocs interface. The header bar includes the title 'Supervisor2, Welcome to nitesh123', a timestamp 'Last Login Time 14/07/2015 16:37', and a failure message 'Last Login Failure Time 14/07/2015 16:48 Failure Attempt Count 1'. The main content area has tabs for 'Inbox' and 'Trash'. On the left, there's a sidebar with 'Folder(s)' containing 'Account Opening', 'Account Transfer' (which is expanded to show 'Bank Draft', 'Education Loan', 'Fixed Deposite', 'Home Loan', 'Interest Rate', 'Joint Account', 'Leon Payment', and 'Pension Account'), and links for 'Add Document', 'Add Folders', 'Properties', 'Delete Folder', 'Alarms / Reminders', 'Move / Copy', 'Sharing', 'Audit Log', and 'Order'. The main table lists documents under 'nitesh123/ Account Transfer': 'Account Opening Form_2' (TIF, 213 KB, 1 page, 1 modified, 1.0 version), 'Introducer's Details' (TIF, 149 KB, 1 page, 1 modified, 1.0 version), 'Account Opening Form_2' (TIF, 213 KB, 1 page, 1 modified, 1.0 version), 'Photo ID' (JPG, 311 KB, 1 page, 1 modified, 1.0 version), and 'Personal Details' (DOCX, 13 KB, 1 page, 1 modified, 1.0 version). The 'Sharing' option in the context menu is highlighted with a red box. At the bottom, there are links for 'Add Folders', 'Properties', 'Move / Copy', 'Delete Doc(s)', 'Check Out', 'Check In', 'Versions', 'Forward', 'Sharing', 'Download', 'Links', 'Post', 'Duplicate', 'Audit Log', 'Alarms/Reminders', and 'Audit Log'.

Figure: 2.172

2. The **Document Sharing** screen appears. Click the **Shared** tab.

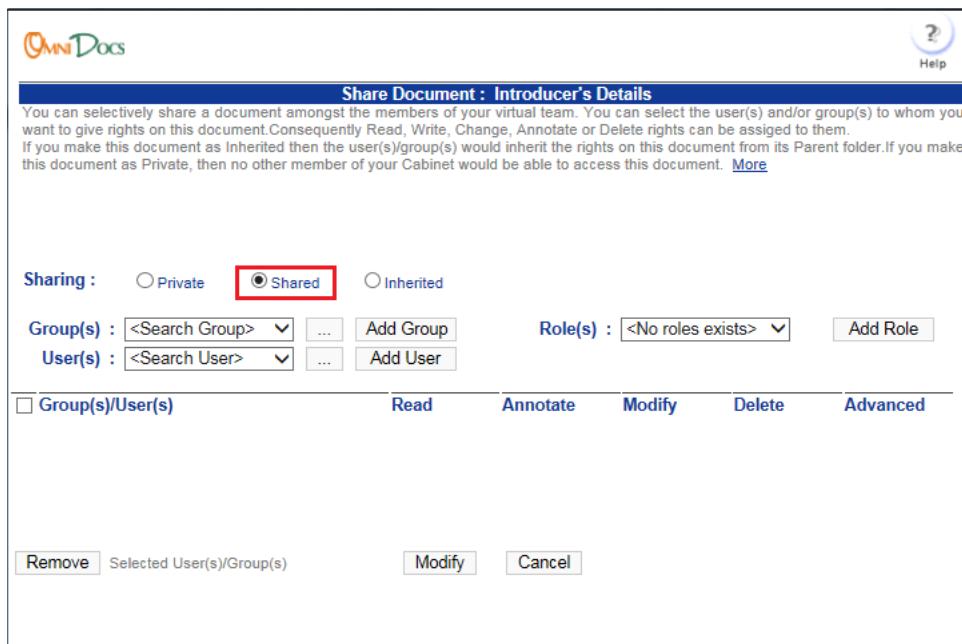


Figure: 2.173

3. Click the ellipsis button besides the **User(s)** drop-down list and add required user to the same.
4. Select the user from the **User(s)** drop-down list and click the **Add User** button to specify the user to whom you want to assign sharing of the document.

Working with OmniDocs

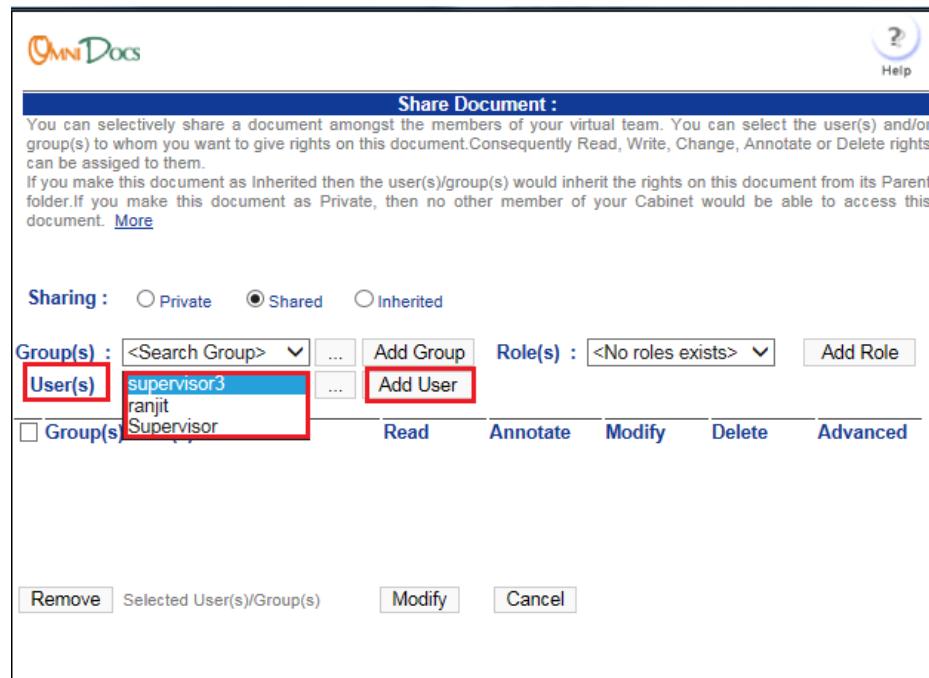


Figure: 2.174

5. By default the documents have inherited rights, but you can change the rights assigned to documents from **Inherited** to **Private** or **Shared**.
6. Click the ellipsis button besides the **Group(s)** drop-down list and add required user to the same.
7. Select the group from the **Group(s)** drop-down list and click the **Add Group** button to specify the group to whom you want to assign sharing of the document.

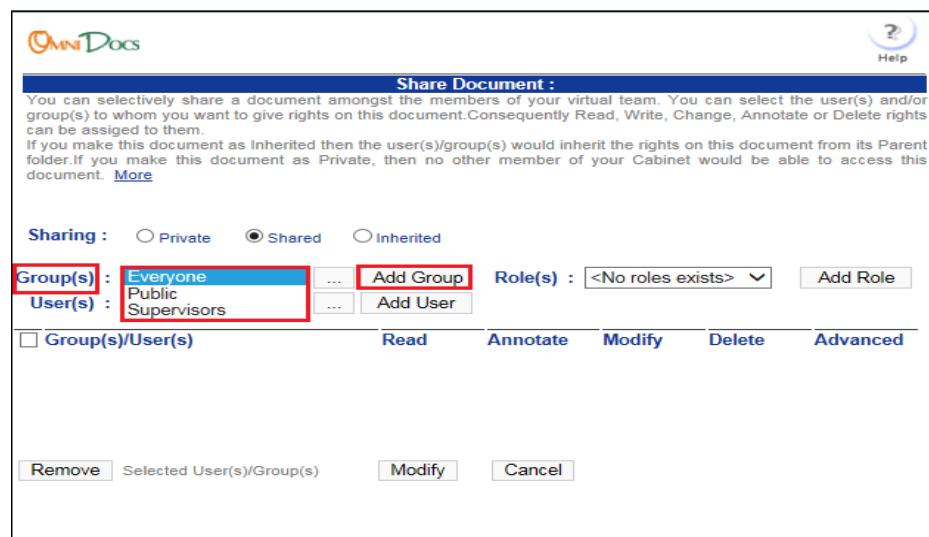


Figure: 2.175

8. Select the rights you need to assign to added **Groups** and **Users** or as per the need cancel the provided default rights.

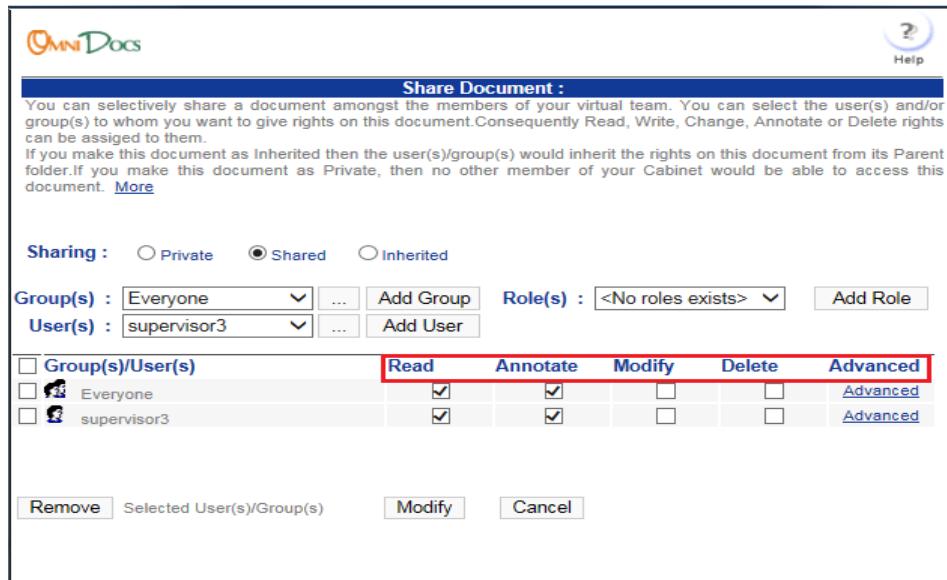


Figure: 2.176

9. You may select the Groups or Users that you need to **delete** from the list and click the **Remove** command button on the **Document Sharing** screen.

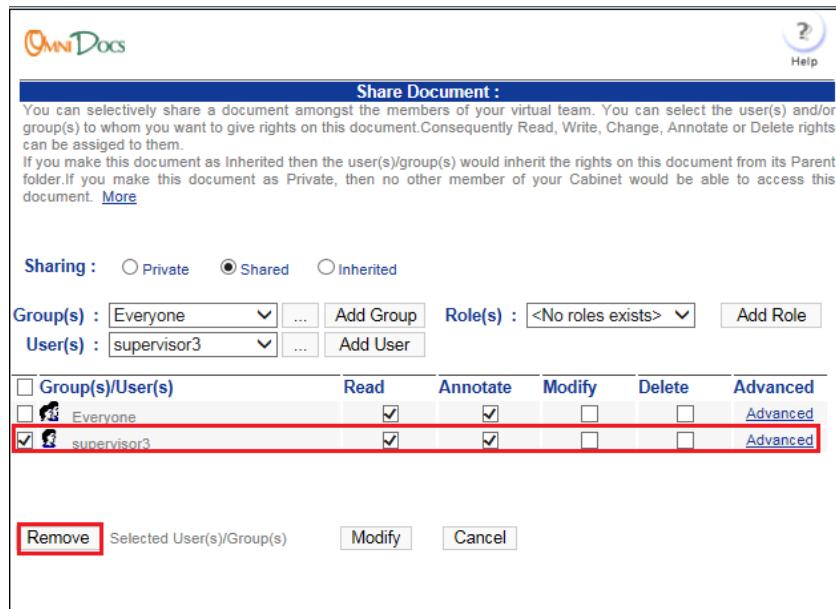


Figure: 2.177

10. Click the **Modify** command button to save the changes, else click the **Cancel** button to exit from the **Sharing Document** screen at any stage without saving the changes.

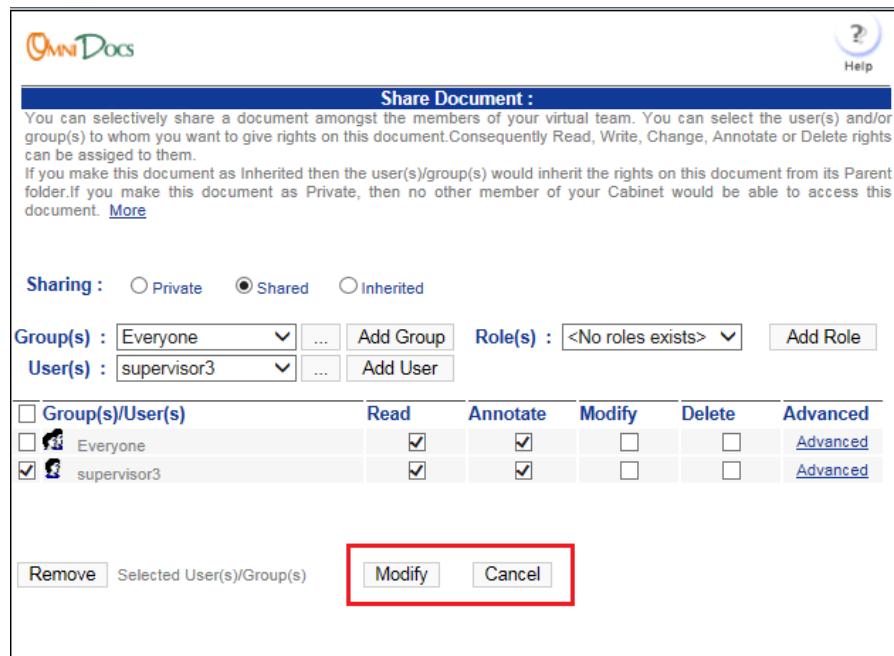


Figure: 2.178

11. Click the **Advanced** link to specify advance-sharing properties of the document to the user.

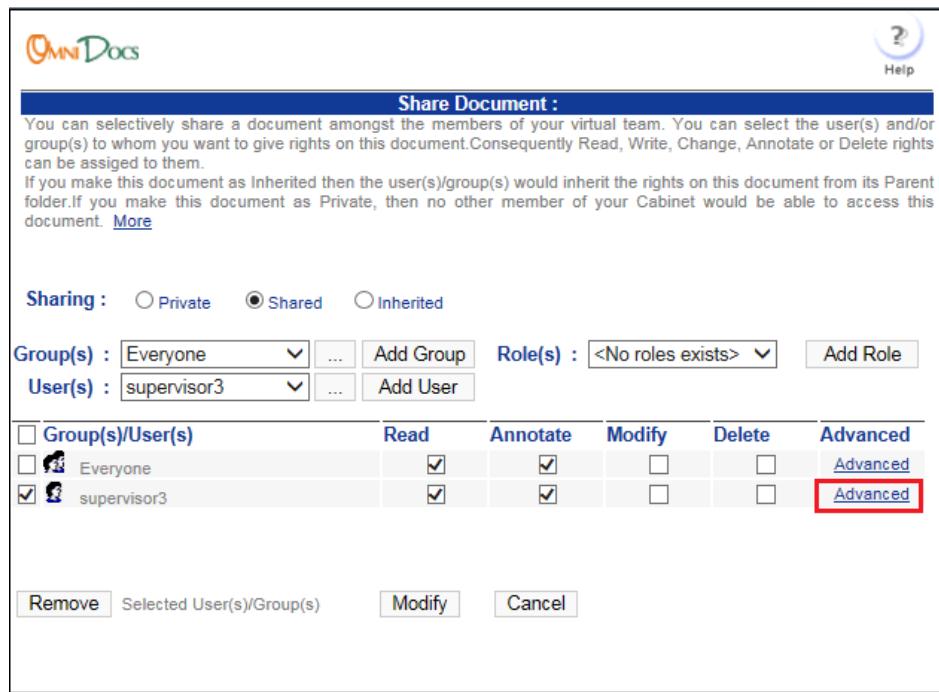


Figure: 2.179

12. An **Advanced Setting** window pops-up. A user is allowed to download the document only when both the **Print** and the **Copy** rights are assigned to the user.
13. Click **Save** button.

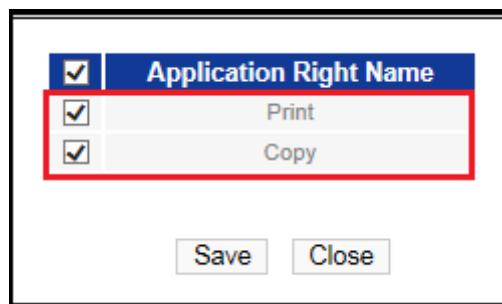


Figure: 2.180

NOTE:

In order to download documents of a shared folder, it is mandatory for a user(s)/groups(s) to have both **Print** as well as **Copy** rights.

2.6.10 Check Out

To **check out** the document for changing its image, follow the following steps:

1. Select the required document that has to be checked out, and click the **Check Out** link.

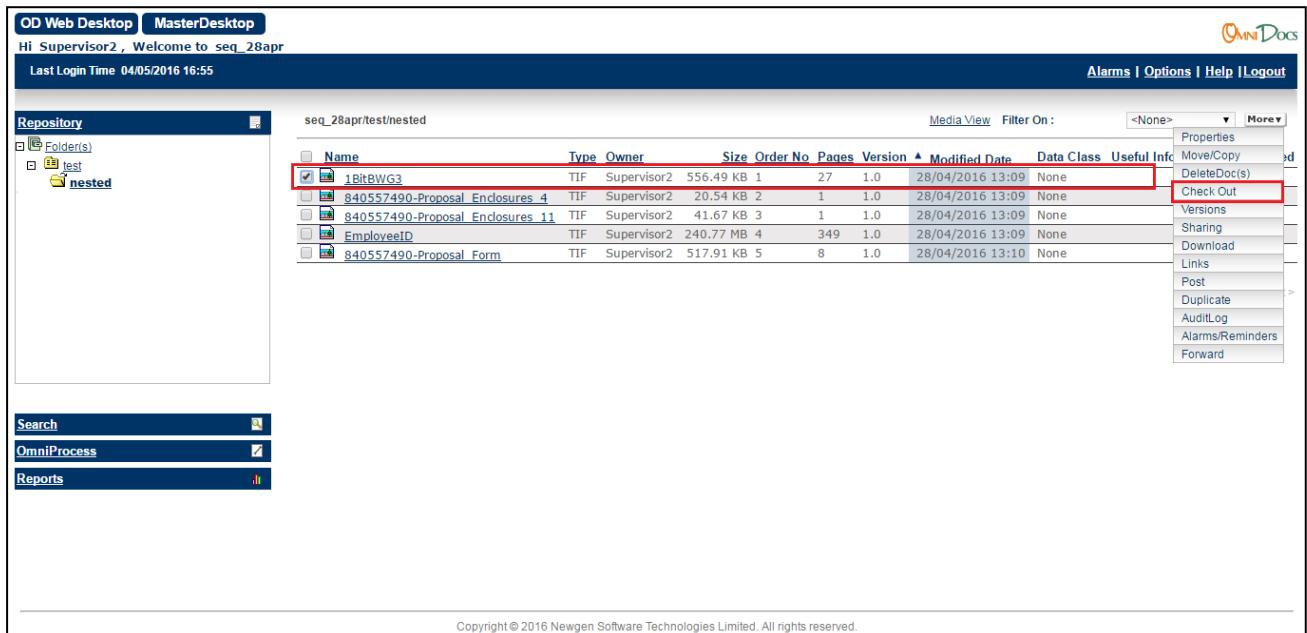


Figure: 2.181

OR

Working with OmniDocs

Name	Size	Type	Pages	Modified	Owner	Data Class
Personal Details	13 KB	DOCX	1...	08/07/2015 02:40	Supervisor2	
<input checked="" type="checkbox"/> Photo ID	311 KB	JPG	1	08/07/2015 21:28	Supervisor2	
Beneficiary Form	213 KB	TIF	1	10/07/2015 01:23	Supervisor2	
Introducer's Details	149 KB	TIF	1	14/07/2015 19:17	Supervisor2	Account Beneficiary

Figure: 2.182

2. A message box is invoked prompting for checkout of the document.
3. To check out the document, click **OK** button else click **Cancel** button.

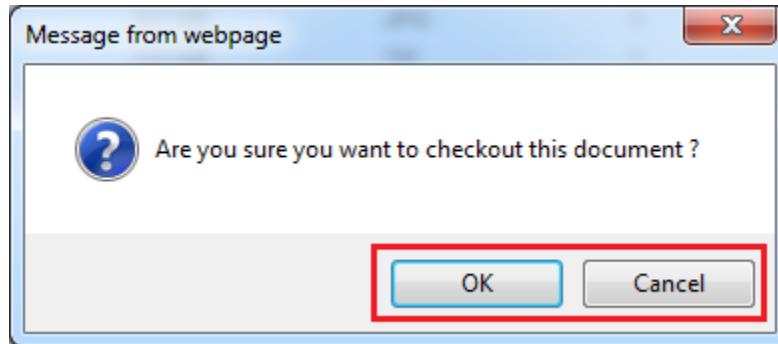


Figure: 2.183

4. If the User click **OK** button, the **Check Out Document** screen is invoked. The name of the selected document to be checked out is displayed.
5. Click **Download** link to download the selected document onto the hard disk.
6. If further, the checked out document needs to be check-in, in such case the downloading of the document is **mandatory**.

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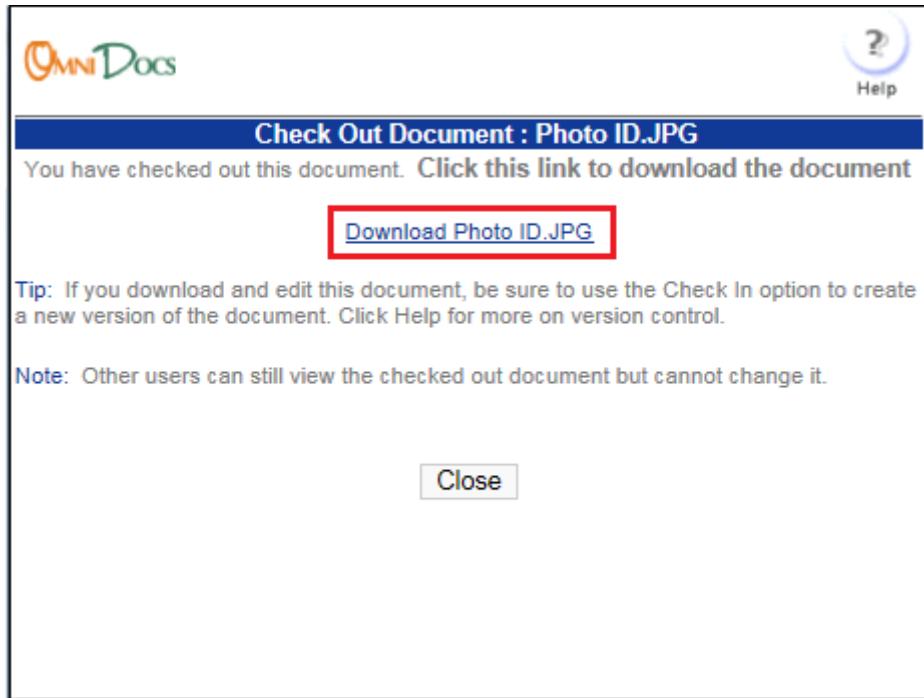


Figure: 2.184

7. Click **Close** to close the check out document window.
8. A **red tick** symbol is superimposed in front of the document which signifies that the document is checked out. The name of the user who has checked out the document is visible on placing the mouse arrow on the tick symbol.

The screenshot shows the OmniDocs application interface. The top navigation bar includes 'Custom View', 'Alarms', 'Options', 'Search', 'Help', and 'Logout'. The left sidebar shows a tree view of 'Folder(s)' containing 'Inbox', 'Trash', and several account-related folders like 'Account Opening', 'Account Transfer', etc. The main content area displays a list of documents under 'Get Total No Of Docs' for 'nitesh123/ Account Opening'. The list includes:

Name	Size	Type	Pages	Modified	Owner	Data Class
Personal Details	13 KB	DOCX	1...	08/07/2015 02:40	Supervisor2	
<input checked="" type="checkbox"/> Photo ID	311 KB	JPG	1	08/07/2015 21:28	Supervisor2	
Beneficiary Form	213 KB	TIF	1	10/07/2015 01:23	Supervisor2	
<input type="checkbox"/> Introducer's Details	149 KB	TIF	1	14/07/2015 19:17	Supervisor2	Account Beneficiary

At the bottom, there are links for 'Add Folders', 'Properties', 'Move / Copy', 'Delete Doc(s)', 'Check Out', 'Check In', 'Versions', 'Sharing', 'Forward', 'Download', 'Links', 'Post', 'Duplicate', 'Audit Log', 'Alarms/Reminders', and 'Audit Log'.

Figure: 2.185

2.6.11 Checking In

To check-In the document, follow the following steps:

1. Select the required document that has to be checked-In, and click the **Check In** link.

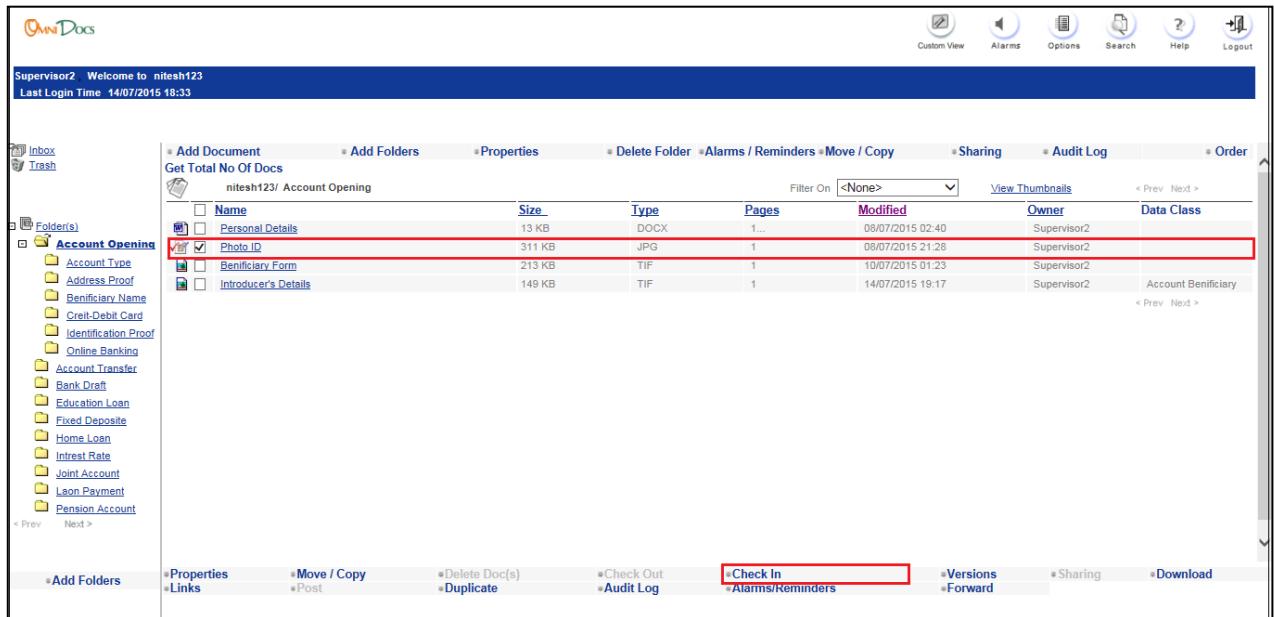


Figure: 2.186

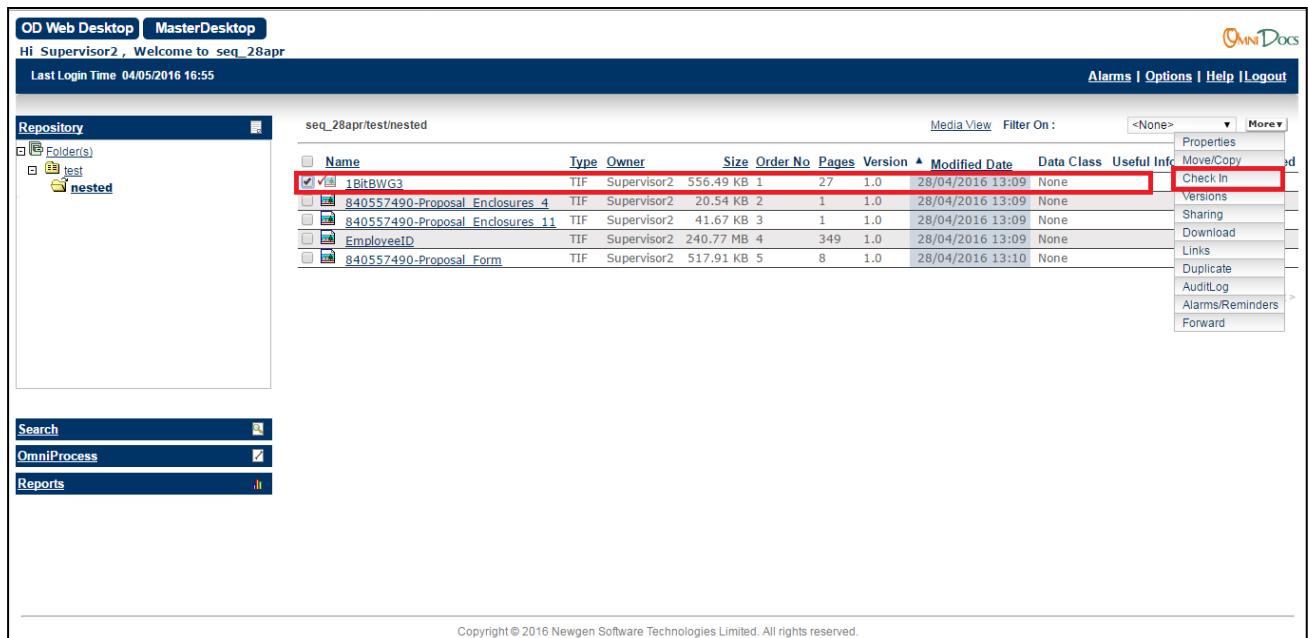


Figure: 2.187

2. The **Check In** Document screen appears.
3. The name of the selected document that has to be checked in is displayed in the **Document Name**.

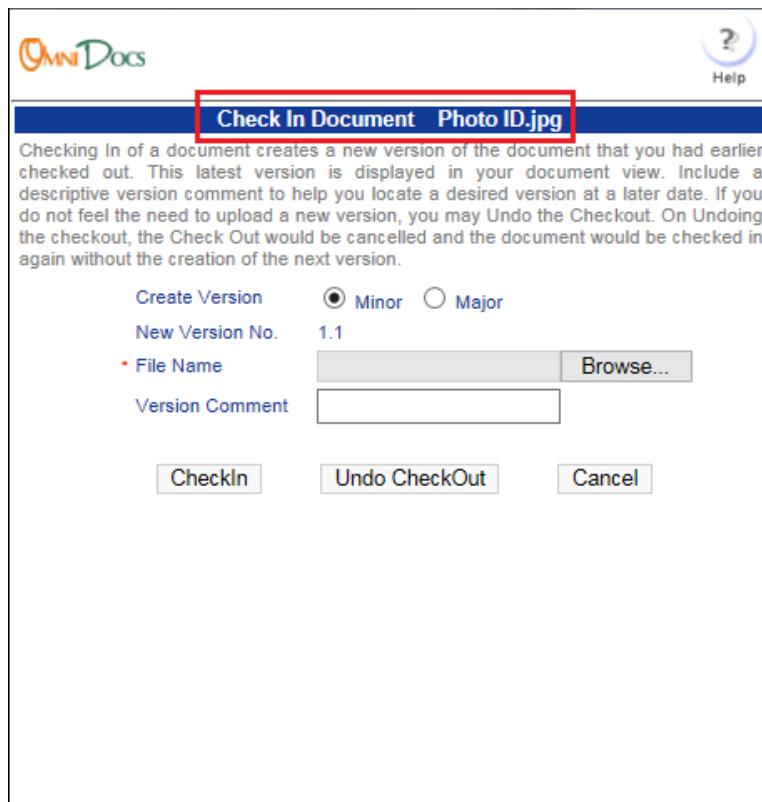


Figure: 2.188

4. Select **Minor Versioning** or **Major Versioning**, based on the changes made in to the document.
5. Specify the path from where the document has to be checked-in. Click **Browse** to invoke the **Choose file** dialog box from where the path of the checked out document can be selected.
6. The path of the selected file is displayed in the **File Name** text box.
7. Specify comments in **Version Comment** textbox for the new version created while checking in the document.

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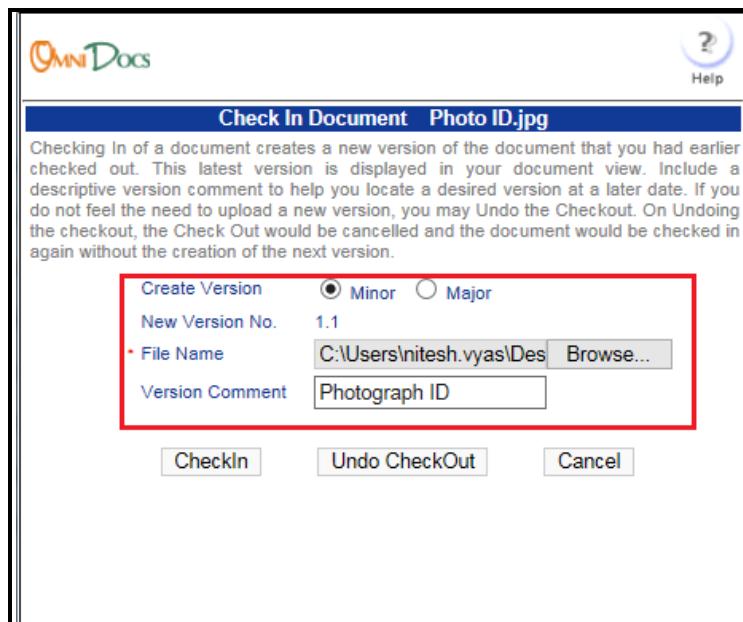


Figure: 2.189

NOTE:

It is optional to specify the comments. A maximum of 255 characters can be added in the Comments

8. Click **CheckIn** to check in the selected document from the path specified.
9. Click **Cancel** to close the "CheckIn Document" dialog box.

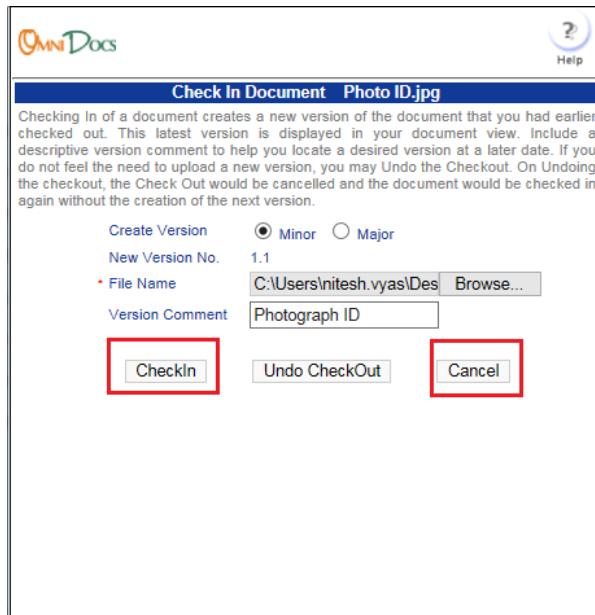


Figure: 2.190

2.6.12 Undo Check Out

To **undo checkout** the selected document, follow the following steps:

1. If the user doesn't want to change the document image, he can undo check out the document and let the original image of the document stay as it is.
2. Select the document for undo check out.
3. Click the **Check In** Document link. Refer [Figure: 2.186](#) and [Figure: 2.187](#).
4. The CheckIn Document screen appears. Click **Undo CheckOut** button to undo checkout the selected document.

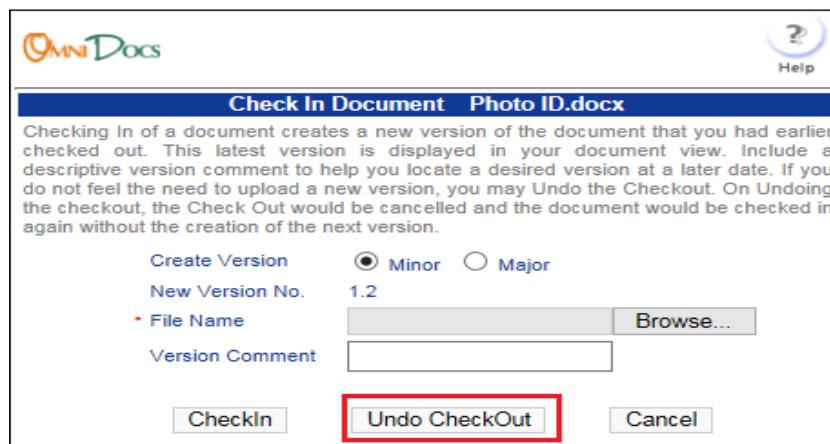


Figure: 2.191

NOTE:

Undo checkout can be performed by the user or the supervisor who has checked out the document irrespective of other users who have rights on the selected document.

After the document is undo checked out it becomes unlocked

2.6.13 Creating Versions

To **create versions**, follow the following steps:

1. Select the document whose version has to be created and Click **Versions** link.

The screenshot shows the OmniDocs web desktop interface. The top navigation bar includes 'OD Web Desktop', 'MasterDesktop', 'Hi Supervisor2, Welcome to seq_28apr', 'Last Login Time 04/05/2016 16:55', and the 'OmniDocs' logo. Below the navigation is a 'Repository' sidebar with 'Folder(s)' containing 'test' and 'nested'. The main content area displays a list of documents under 'seq_28apr/test/nested'. The first document, '1BitBWG3', is selected and highlighted with a red box. A context menu is open over this document, with the 'Versions' option also highlighted with a red box. Other options in the menu include Properties, Move/Copy, DeleteDoc(s), Check Out, Sharing, Download, Links, Post, Duplicate, AuditLog, Alarms/Reminders, and Forward. The bottom of the screen shows search, OmniProcess, and Reports links, along with a copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 2.192

OR

The screenshot shows the OmniDocs web desktop interface. The top navigation bar includes 'OmniDocs', 'Supervisor2, Welcome to nitesh123', 'Last Login Time 14/07/2015 18:33', and various system icons like Custom View, Alarms, Options, Search, Help, and Logout. The left sidebar shows 'Inbox' and 'Trash' under 'Get Total No Of Docs'. Below this is a 'Folder(s)' section with 'Account Opening' expanded, showing sub-folders like 'Account Type', 'Address Proof', 'Beneficiary Name', etc. The main content area displays a list of documents under 'nitesh123/ Account Opening'. The document 'Photo.ID' is selected and highlighted with a red box. A context menu is open over this document, with the 'Versions' option also highlighted with a red box. Other options in the menu include Properties, Move / Copy, Delete Doc(s), Post, Duplicate, Check Out, Audit Log, Alarms / Reminders, and Forward. The bottom of the screen shows links for Add Folders, Properties, Move / Copy, Delete Doc(s), Post, Duplicate, Check Out, Audit Log, Check In, Alarms / Reminders, Versions, Sharing, and Download.

Figure: 2.193

2. The **Document Version(s)** screen appears.
3. Click **Create** command button to create the version.

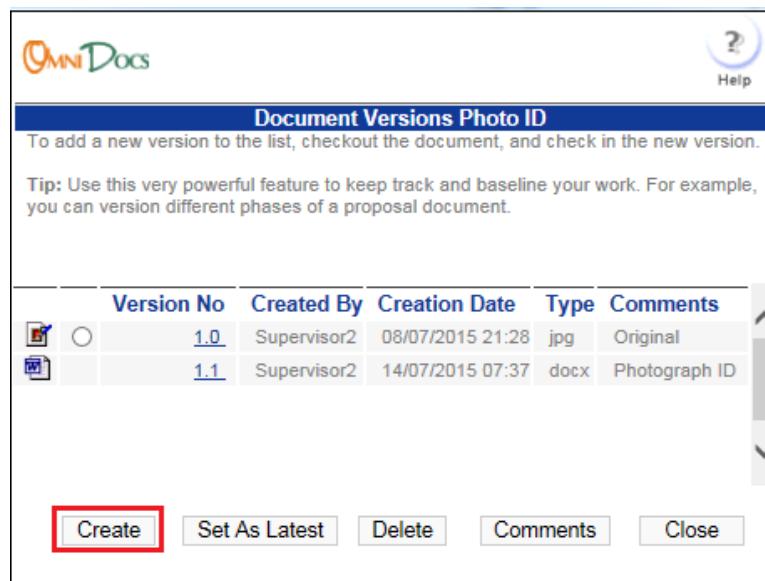


Figure: 2.194

Version(s) screen displays

The name of the selected document

The current version number of the selected document

Creation date of the document

Type of the document

Comments on the document

4. The **Create Version** screen appears. Specify the relevant comments for the version to be created in Version Comment textbox.
5. Click **Create Version** to create the version of the selected document.
6. Click **Cancel** to close the Create Version screen without saving the changes made.

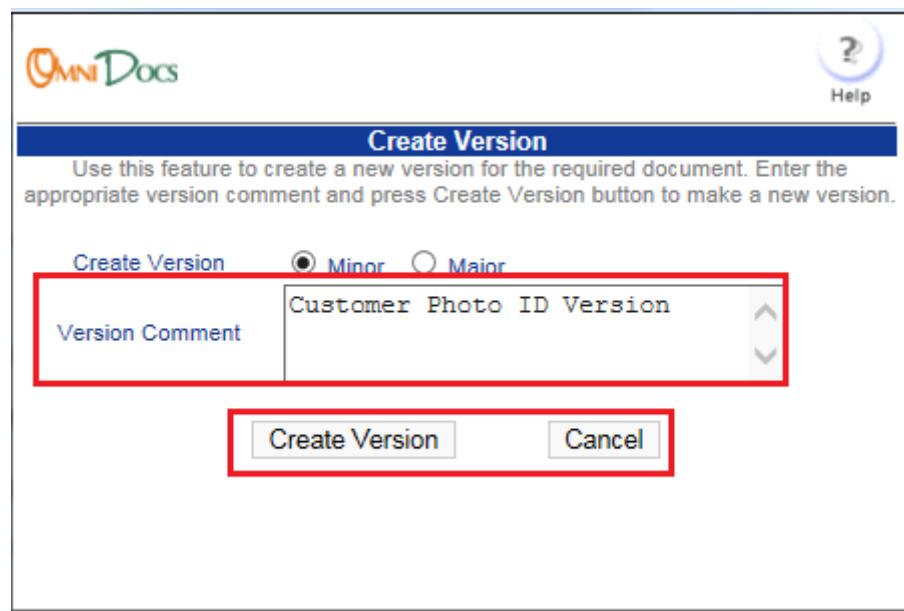


Figure: 2.195

7. To delete the previous versions of the document, select the version and click on the **Delete** button.

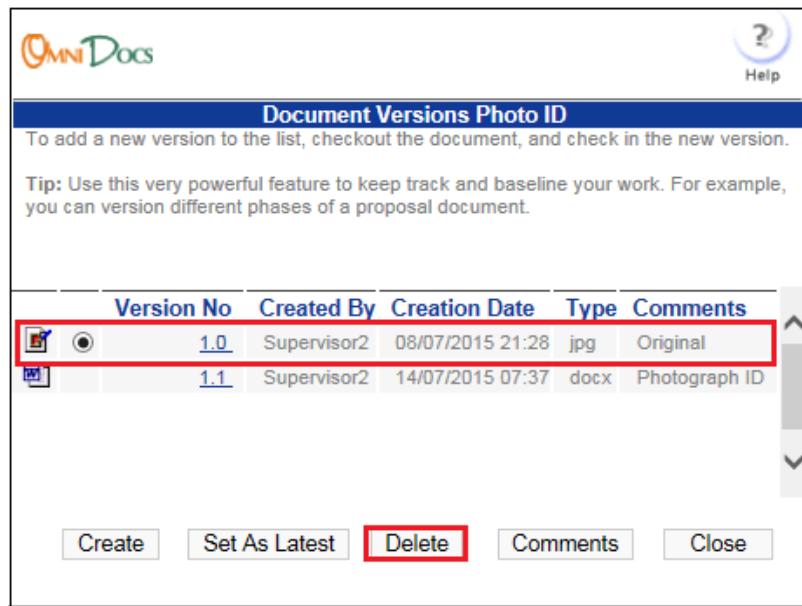


Figure: 2.196

8. A message box is invoked prompting for Delete Version of the document.
9. To delete the selected version of the document, click **OK**.
10. To close the message box without deleting the version, click **Cancel**.

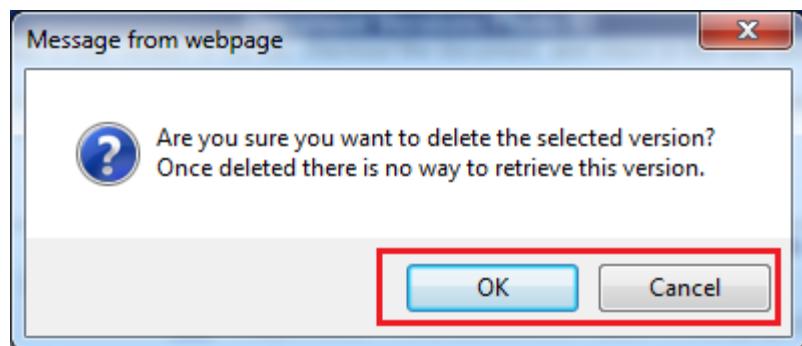


Figure: 2.197

11. To create a latest version of the present document, select the document and click on **Set as Latest**.

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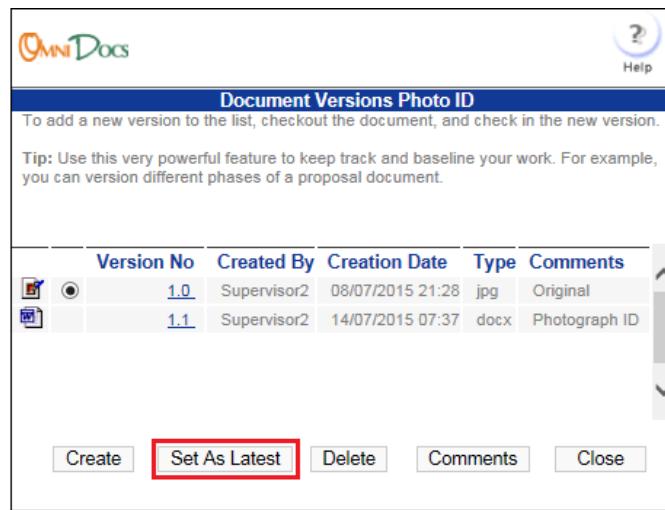


Figure: 2.198

2.6.14 Searching Document

To search a document(s), follow the following steps:

2.6.14.1 Document Search in MasterDesktop

1. Click **Search** button on the Desktop.

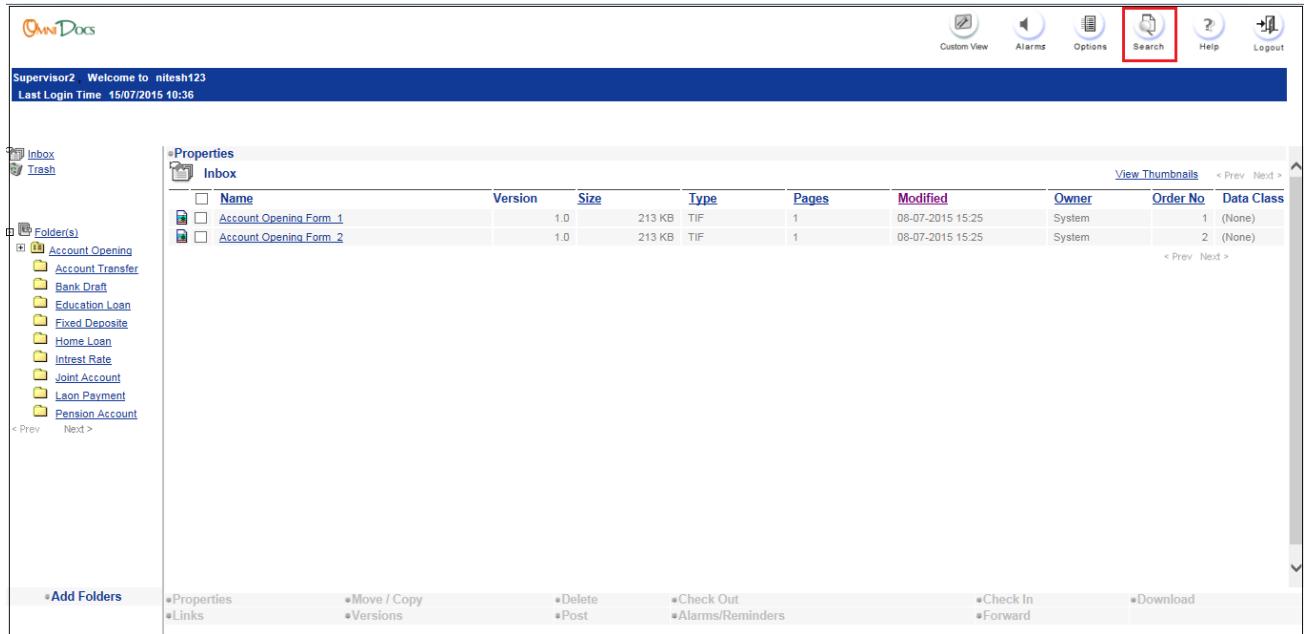


Figure: 2.199

2. The **Search Document** screen appears; by default **General** tab appears selected. In this, the **general** properties of the document, such as, document name, author, type, owner, keywords and size are displayed.
3. To search a document within the selected folder, click the ellipsis button besides the **Search in** option.

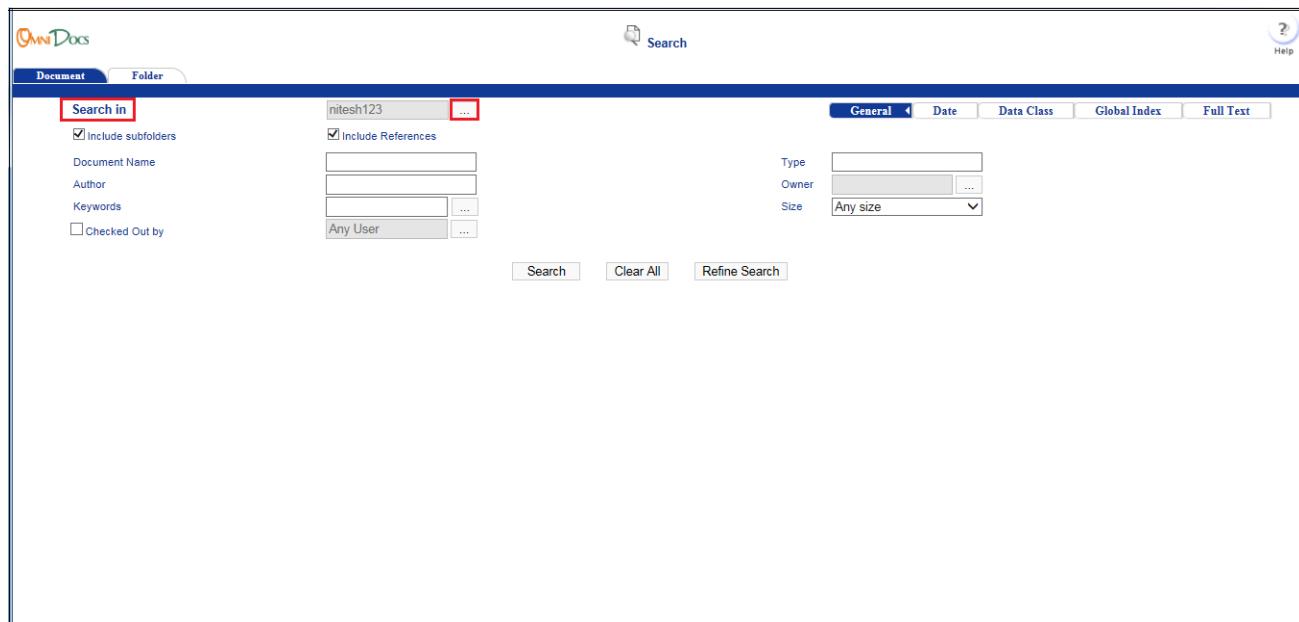


Figure: 2.200

4. Select the folder name from the **Select Folder** window. Click **OK**. Refer [Figure: 2.71](#).
5. The selected folder appears in the **Search in** textbox. To perform a search on the subfolders within the folder, check-in the **Include Subfolders** check-box. Select the **Include References** option to include referenced documents in searching.

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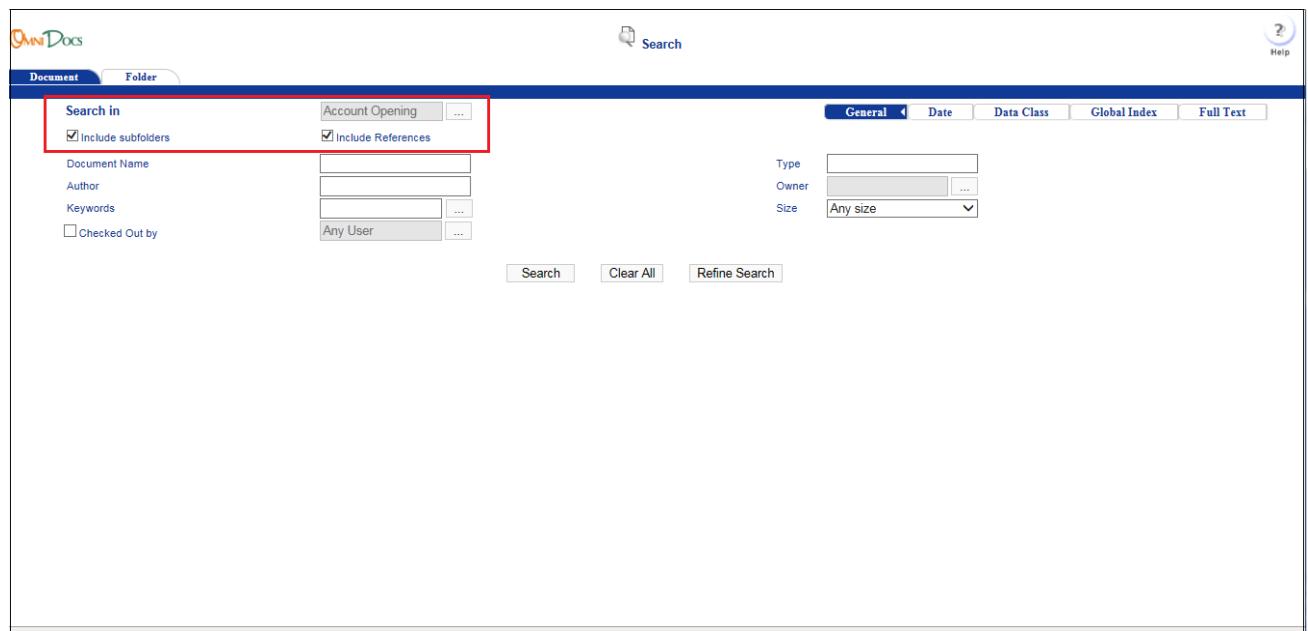


Figure: 2.201

NOTE:

The user can search a folder at **Cabinet** and **Trash** levels. Refer **Figure: 2.73**

- To perform cabinet level search, check-in the "cabinet name" checkbox.
- To perform folder search on trash, check-in the "Trash" checkbox.
- In case, **Data Security** Functionality checkbox is selected in the OmniDocs Admin Home screen, and **Secured Data Classes** and **Global Indexes** are created. In that case, user can carry out the **Document Search** using only unsecured **Data Fields** and **Global Indexes**.

-
6. You can search the documents as per **General** properties, **Date**, associated **Data Class**, **Global Index** or **Full Text**.

2.6.14.2 Document Search in WebDesktop

1. Login to **OmniDocs web**, open the **Search** tab and click on **Document Search**.
2. Following screen appears.

Document search is a system defined search that allows the user to search the documents on the basis of document name and indexing information.

Search In : seq_28apr

General

Name

Date

Document Modified Between [] and []

Media Metadata

Field Name	Operator	Value	Value
Bit Rate	Equals	[]	[]
Codec	Equals	[]	[]
Duration(In Minutes)	Equals	[]	[]
Frame Rate	Equals	[]	[]
Height	Equals	[]	[]
Sample Rate	Equals	[]	[]
Title	Equals	[]	[]
Width	Equals	[]	[]

Location_Tracker

Global Index

Global Index List [] None [] Add

Figure: 2.202

3. In **Search-In** section, click on ellipsis button to select the folder or cabinet in which the search is to be made.

NOTE:

Search-In section appears, only when **Look in Folder** check box is selected while creating the **Document Search Configuration** in **OmniDocs Admin** Part.

4. In **General**, enter the following details:-
 - Enter the **Document Name**.
 - Enter the **Document Owner** by clicking on ellipsis button and selecting from the Owner List.
 - Enter the **Document Type**.

- Select the **Document Size**, from the drop down size list.
 - Select the **Keyword**, by clicking the ellipsis button and selecting the required keyword from the available keyword list.
-

NOTE:

This is the default document search, which is configurable and can be configured as per need. Admin can configure "document search" configuration from OmniDocs admin. Refer to "OmniDocs 9.1 Administration Manual". Admin can modify the search configuration to make it more specific.

5. In the **Date** section, enter the following inputs:-
 - Select the **Date Range** from the Calender available.
 - Or, Select the **number of fixed days** from the drop down list.
6. In the **Media Metadata** section, enter the following intputs:-
 - Select the metadata operator from the metadata operator drop down list.
 - Enter the required corresponding search value.
7. In the **Data Class Name** section, enter the following inputs:-
 - If **Display All Data Classes** is selected while creating this search configuration, then the complete Data Class list will be available. In that case, carry out the following given steps:-
 - From the **Data Class** list, select the required DataClass.
 - Once a Data Class is selected, the associated Fields appears.
 - In front of the respective **Field Name**, select the required operator from the operator drop down list.
 - Once the operator is selected, enter the necessary value as per the Field Name and its operator.
 - If any particular **Data Class** is selected while creating this search configuration, then the list of associated Field list will be available. In that case, carry out the following given steps:-

- In front of the respective Field Name, select the required operator from the operator drop down list.
- Once the operator is selected, enter the necessary value as per the Field Name and its operator.
- If any particular **Data Class** is selected while creating this search configuration and **Advanced** option is checked then the list of associated Fields is available to choose from the drop down list. In that case, carry out the following given steps:-
 - From the **Data Class Field** drop down list, select the required Data Class Field.
 - Once a Data Class Field is selected, click on **Add** button.
 - The Field Name, along with its operator, its value field and Logical operator list appears.
 - Select the **Operator**, from the Operator drop down list.
 - Enter the necessary **Field Value**.
 - Select the required **Logical Operator** from the Logical Operator drop down list.
 - Repeat the whole process to further Add more Data Class Fields and assign operators and value to them.

NOTE:

In case, **Data Security** Functionality checkbox is selected in the OmniDocs Admin Home screen, and **Secured** Data Classes are created. In that case, user can carry out the Document Search using only unsecured Data Fields. All Secured Data Fields will appear disabled.

8. In the **Global Index** section, enter the following inputs:-
 - From the **Global Index List**, select the required Global Index.
 - Once a Global Index is selected, click on **Add** button.
 - The **Global Index Name**, along with its **Operator List** and its **Field Value** box appears.
 - From the **Operator List**, select the required operator.
 - In the **Field Value Box**, enter the required Field Value.

- Repeat the whole process to further Add more Global Index Fields and assign operators and value to them.
9. Click on **Search** to search the documents.
 10. Or, click on **Clear** to clear the input values.

NOTE:

In case, **Data Security** Functionality checkbox is selected in the OmniDocs Admin Home screen and **Secured Global Indexes** are created. In that case, user can carry out the **Document Search** using only unsecured **Global Indexes**.

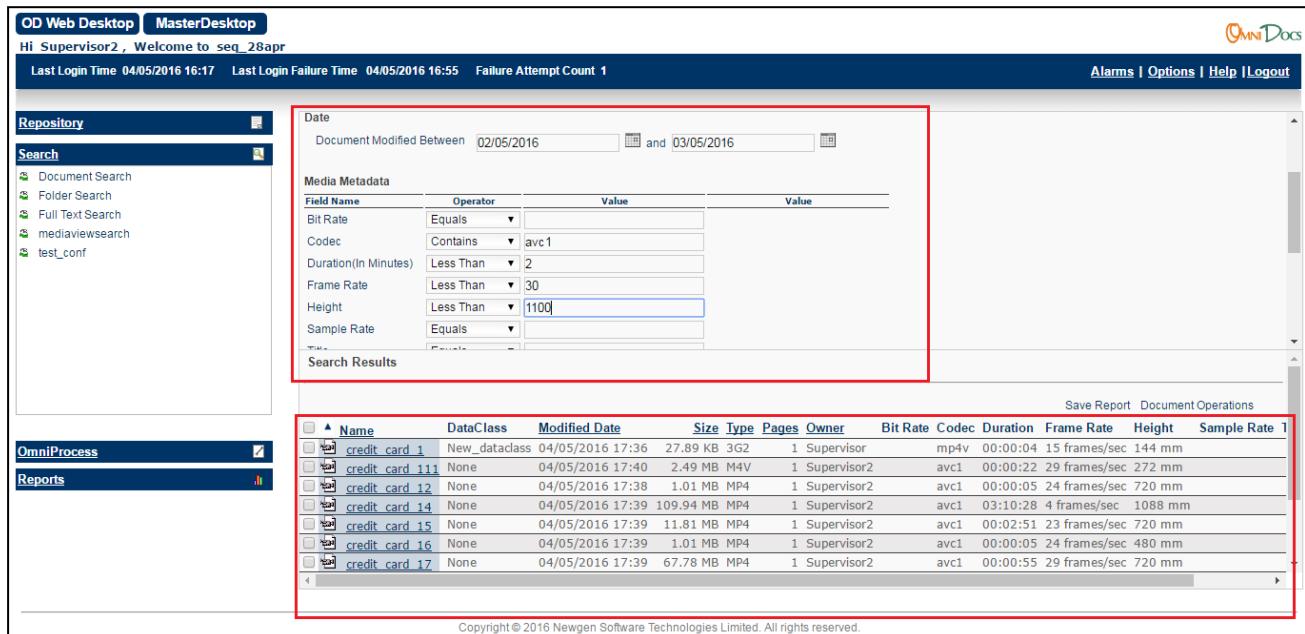


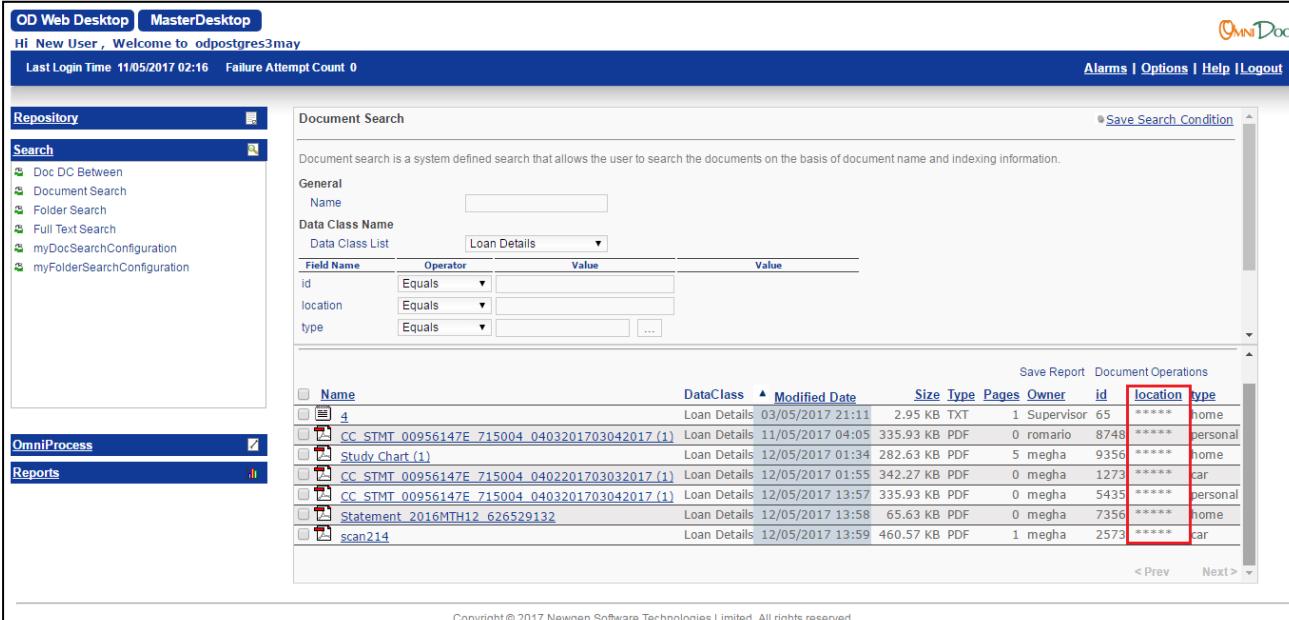
Figure: 2.203

11. This is the default document search, which is configurable and can be configured as per need. Admin can configure "**document search**" configuration from OmniDocs admin. Refer to "**OmniDocs 9.1 Administration Manual**"
12. Admin user can modify the search configuration to make it more specific.
 - User can add "**Date**" criteria in search.
 - In "**general tab**" user can add more search parameters like owner, type, size and keyword.

- In “**Media Metadata tab**” user can add more search metadata parameters such as Bit Rate, Codec, Duration, etc.
- **DataClass** search can be made more specific. Admin user can select one particular dataclass which will be used while searching. Moreover admin user can specify which fields of selected dataclass to be used while searching.
- User can add **Global index** criteria in document search.

NOTE:

If any user carries out Document search using Data Class consisting of secured Data Fields, then in that case only users having the required **View Secured Data** privileges and rights can see both the Secured and Unsecured Data Field Values in the search result. Also in the same case, a user who doesn't have the required privileges and rights can't view the secured data field values in the available search result. Below is the OmniDocs view that a user not having the required View Secured Data privileges and rights will get.



Name	DataClass	Modified Date	Size	Type	Pages	Owner	id	location	type
4	Loan Details	03/05/2017 21:11	2.95 KB	TXT	1	Supervisor	65	*****	home
CC_STMT_00956147E_715004_0403201703042017(1)	Loan Details	11/05/2017 04:05	335.93 KB	PDF	0	romario	8748	*****	personal
Study Chart (1)	Loan Details	12/05/2017 01:34	282.63 KB	PDF	5	megha	9356	*****	home
CC_STMT_00956147E_715004_0403201703032017(1)	Loan Details	12/05/2017 01:55	342.27 KB	PDF	0	megha	1273	*****	car
CC_STMT_00956147E_715004_0403201703042017(1)	Loan Details	12/05/2017 13:57	335.93 KB	PDF	0	megha	5435	*****	personal
Statement_2016MTH12_626529132	Loan Details	12/05/2017 13:58	65.63 KB	PDF	0	megha	7356	*****	home
scan214	Loan Details	12/05/2017 13:59	460.57 KB	PDF	1	megha	2573	*****	car

Document operations on search results

1. Select any document from the list of search results, now user can perform some operations on the searched document. Refer **section 2.6 - Working with Documents**.

NOTE:

When JRE Free mode is disabled; a **Print** option will appear in the **Document Operation** list, highlighted in [Figure: 2.204](#).

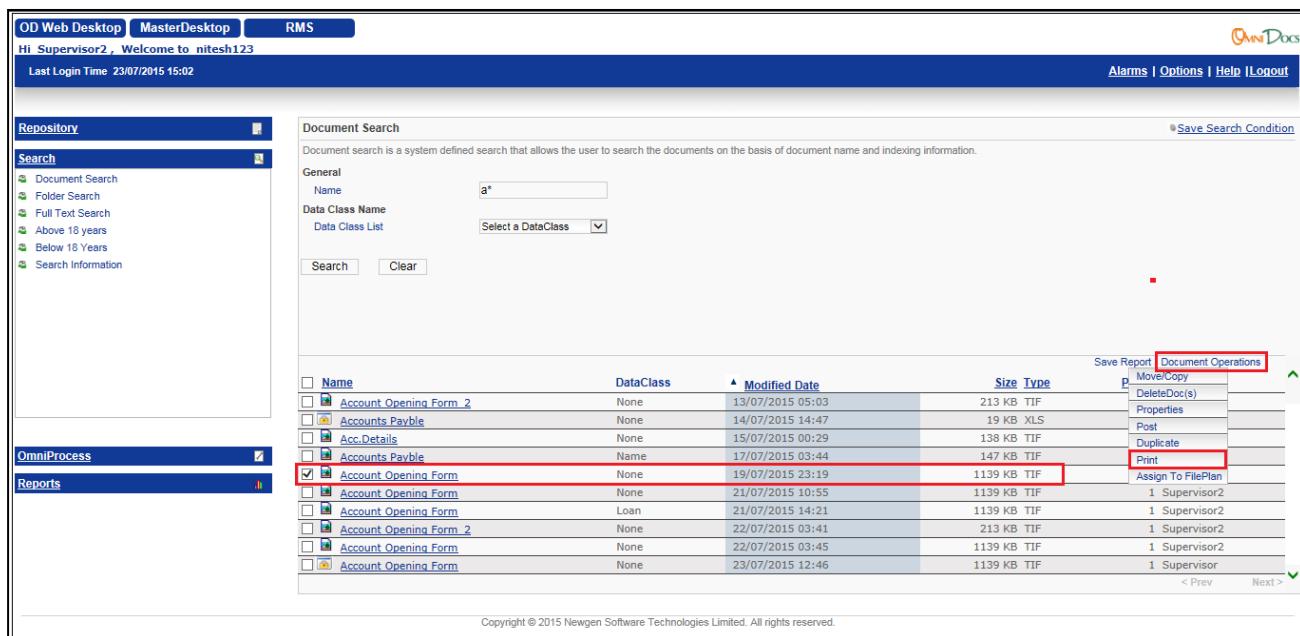


Figure: 2.204

2. These document operations are **configurable** from OmniDocs admin. Admin user can configure which document operations to be allowed on searched documents. Refer "**OmniDocs 9.1 Administration Manual**".

Viewing Document from Search Results

1. Click on any document from the list of search results. Image documents will open in image viewer. Other types of document like **docx**, **xlsx** will open in native application. Media Files will open in Media Viewer. By default **Full View** of the selected document appears.

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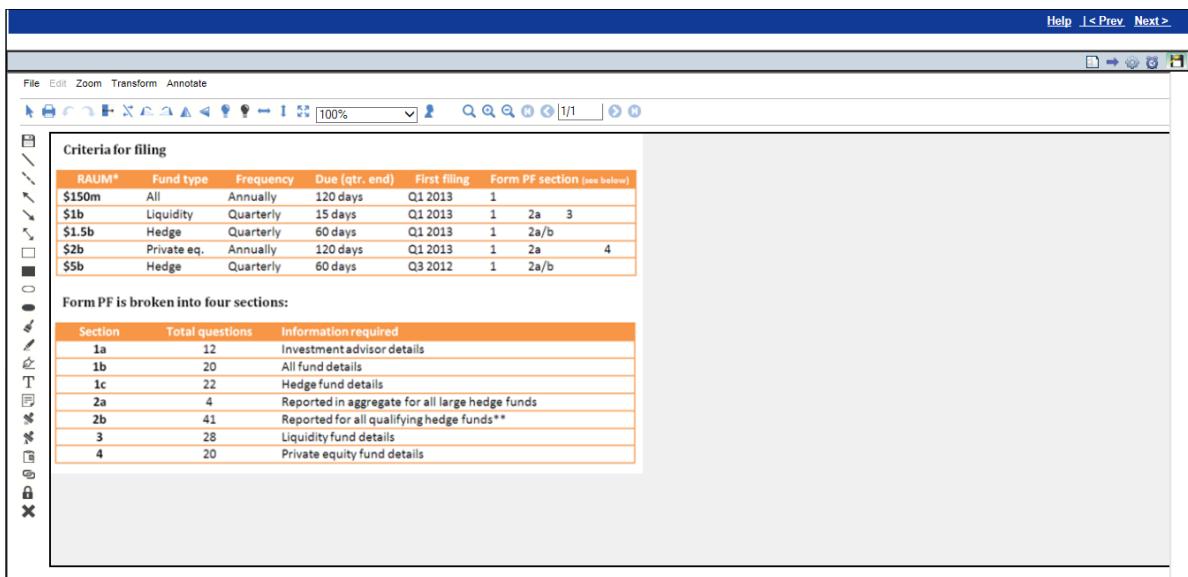


Figure: 2.205

2. The displayed view of the selected document is configurable with admin user and can be configured to **Data View**. In "Data Class" view associated data class appears in the left pane of the screen.

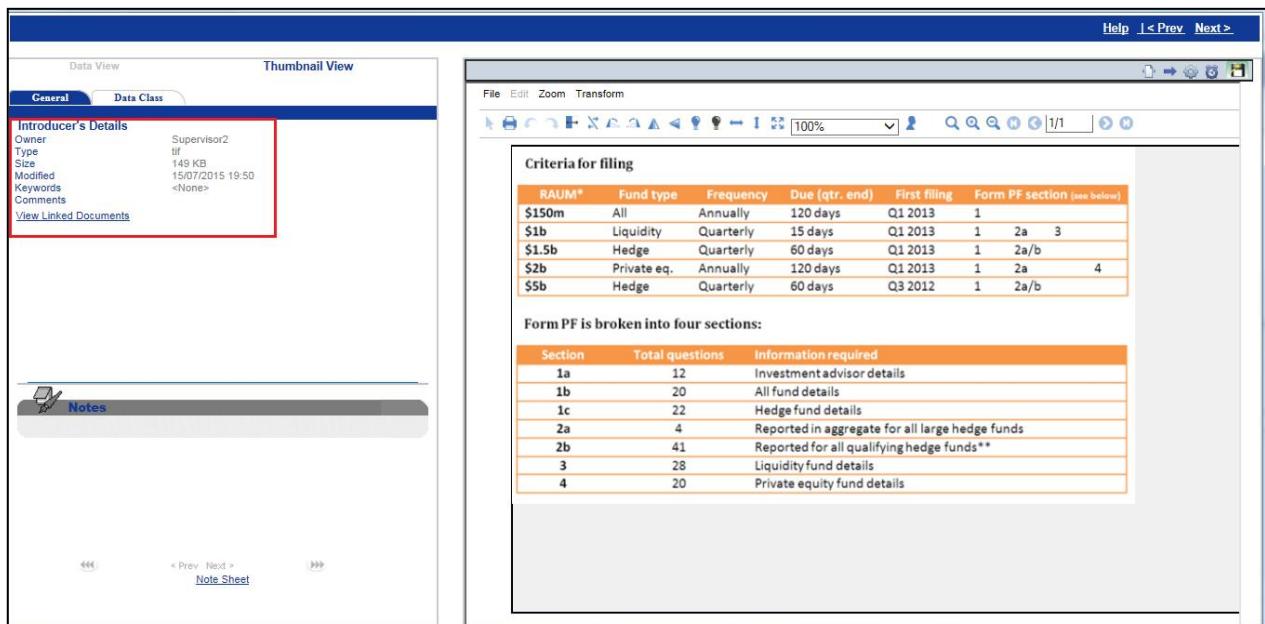


Figure: 2.206

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3. Admin user can also configure the **menu bar**, **toolbar** and **annotation bar** in document view. Following screen shows the document view with all three set as true.

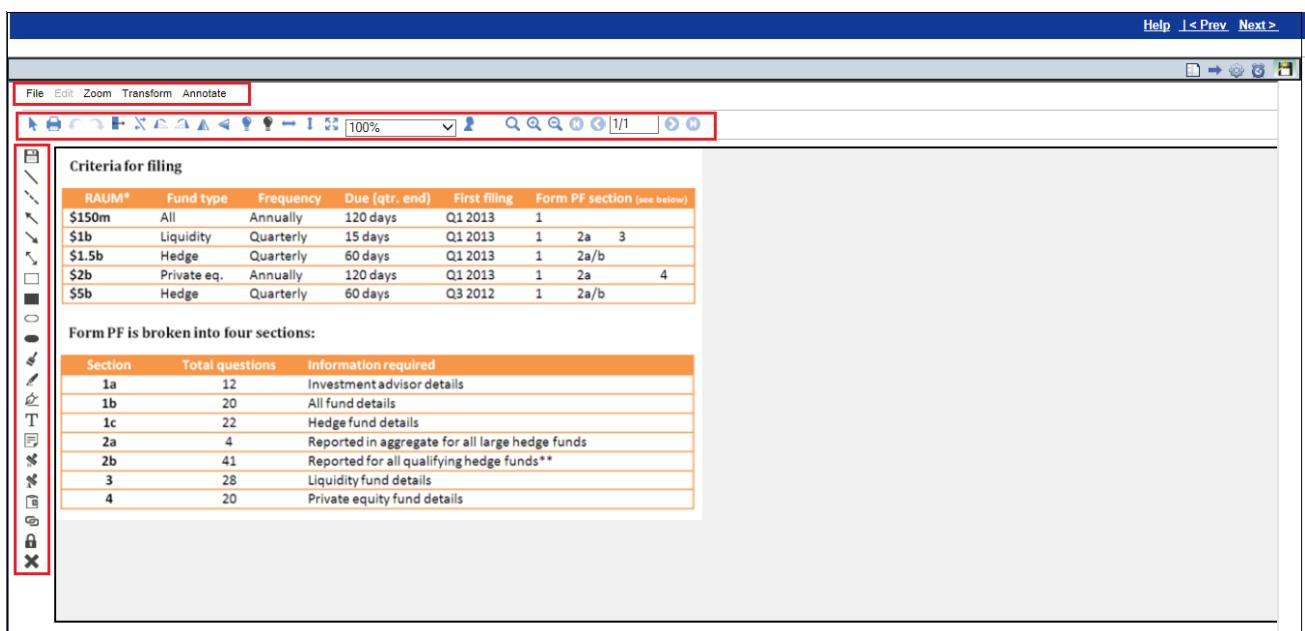


Figure: 2.207

4. User can also add customized search criteria for document search from OD web desktop. Select “**Document Search**” from search tab and click on “**save search condition**” as shown in image below.

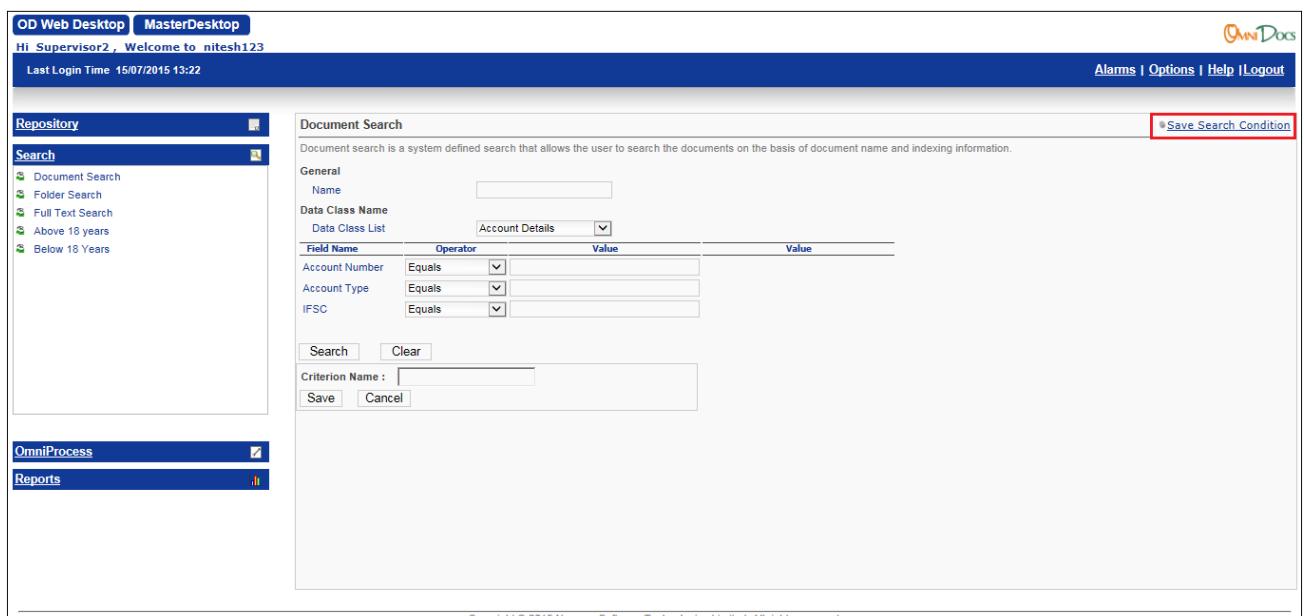


Figure: 2.208

5. When user clicks on “**Save Search Condition**” then a pop up opens up.
6. Enter the search criteria which you want to save, enter the **Criterion Name** and click on **Save** button.

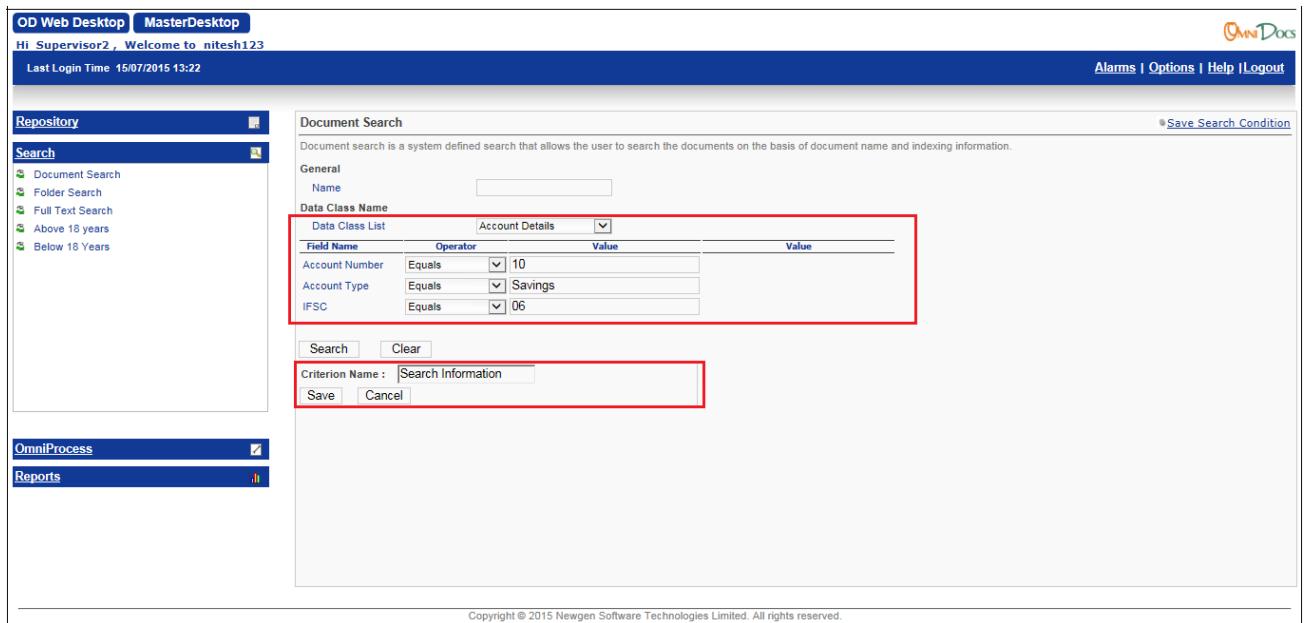


Figure: 2.209

7. Once user click on save button new configuration is added to the list of existing configurations.
8. Search the documents as per the defined configuration.

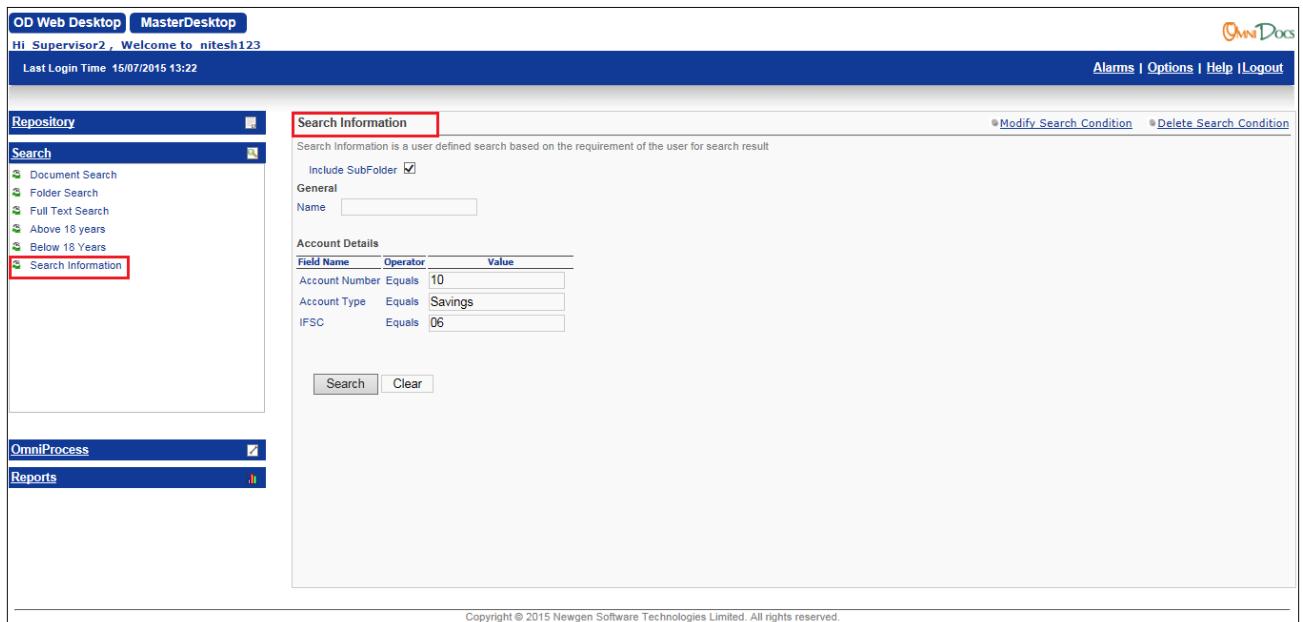


Figure: 2.210

9. Click the **new added search configuration** from the list of search configurations.
10. The documents satisfying the clicked search criteria appear under the **Search Result** section of the screen.

2.6.14.3 General Search

To search documents on the general properties, follow the following steps:

1. Click the **General** tab.
2. Specify document's name in the **Document Name** text box.
3. You can specify wild cards for document name. For example, if you have to search for the document named—"Account Details". Then, you can specify document name as **A*** or **Account***.
4. Specify the owner's name on which the document has to be searched, in the **Owner** text box by clicking ellipsis button besides "Owner" textbox.
5. Specify the author's name on which the document has to be searched, in the **Author** text box.
6. Specify the **Keywords** for searching a document on them.

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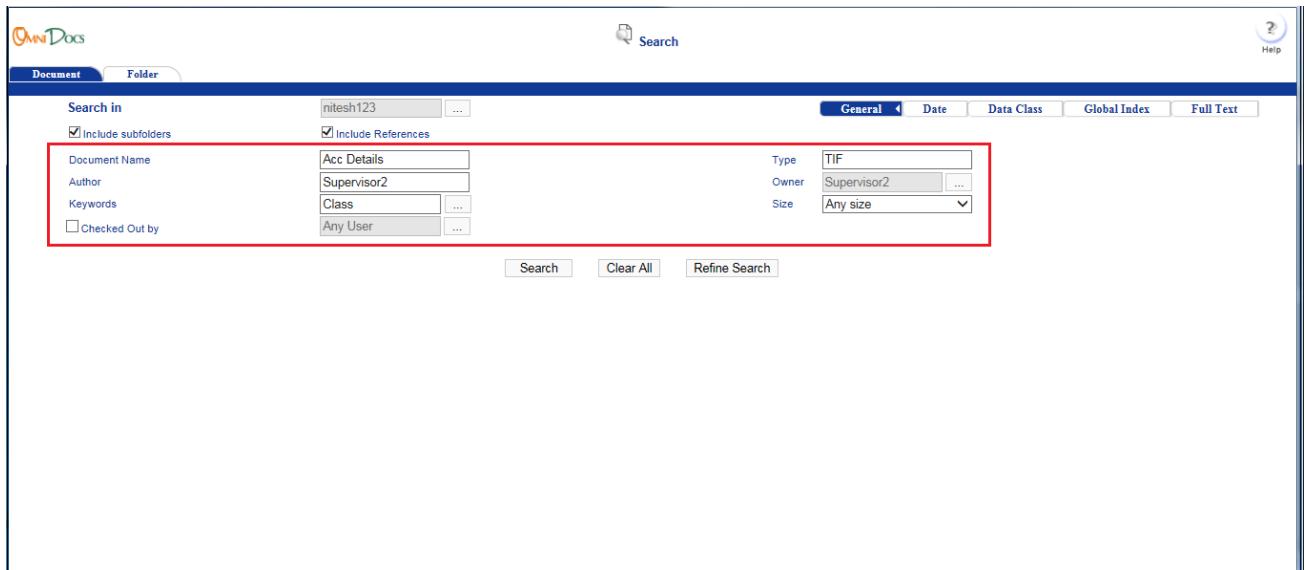


Figure: 2.211

7. You can specify the document content on which the search can be made. For searching on the document content, click on the **Full Text** tab and then specify the text on which the document can be searched, in Containing Text.

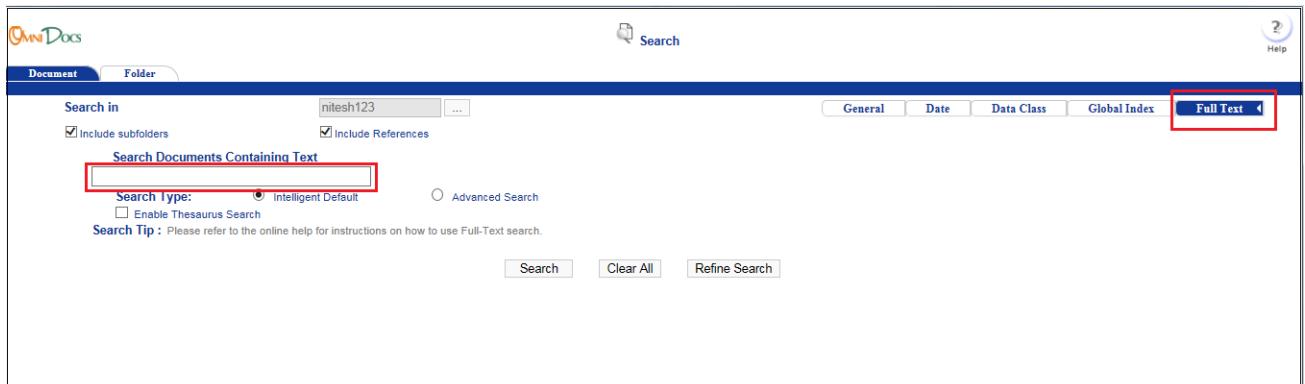


Figure: 2.212

8. To begin the search, click the Search button. The search result is displayed.
9. Click **Clear All** to clear the entire search criteria set. All the fields except the **Include Subfolder(s)**, **Include References** and **cabinet** name will get clear.
10. Click **Refine Search** to clear the **Search Result** pane.

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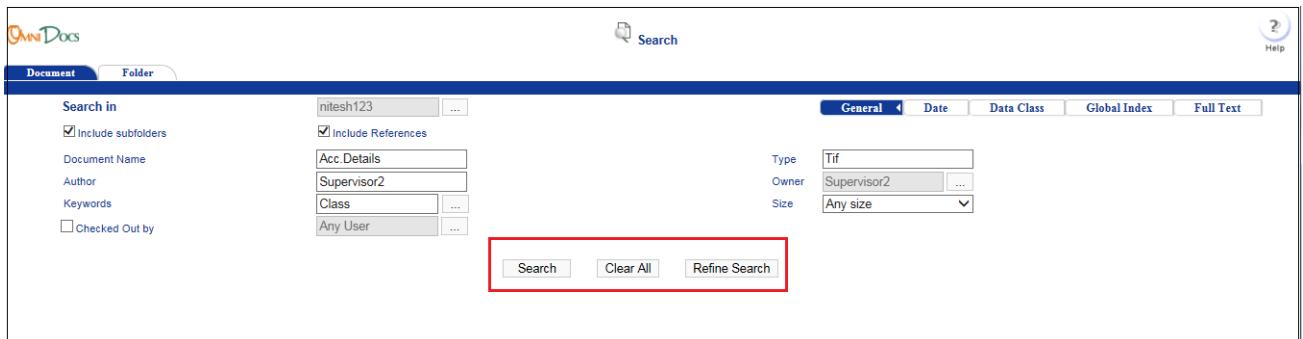


Figure: 2.213

2.6.14.4 Date Search

To search a folder on the basis of a **date**, proceed as follows:

1. Click the **Date** label of the **Document** tab in the "Search" screen. The "Date" tab screen appears.
2. Click the ellipsis button beside the **Search In** list box to view the list of folders present in the logged-in Cabinet.

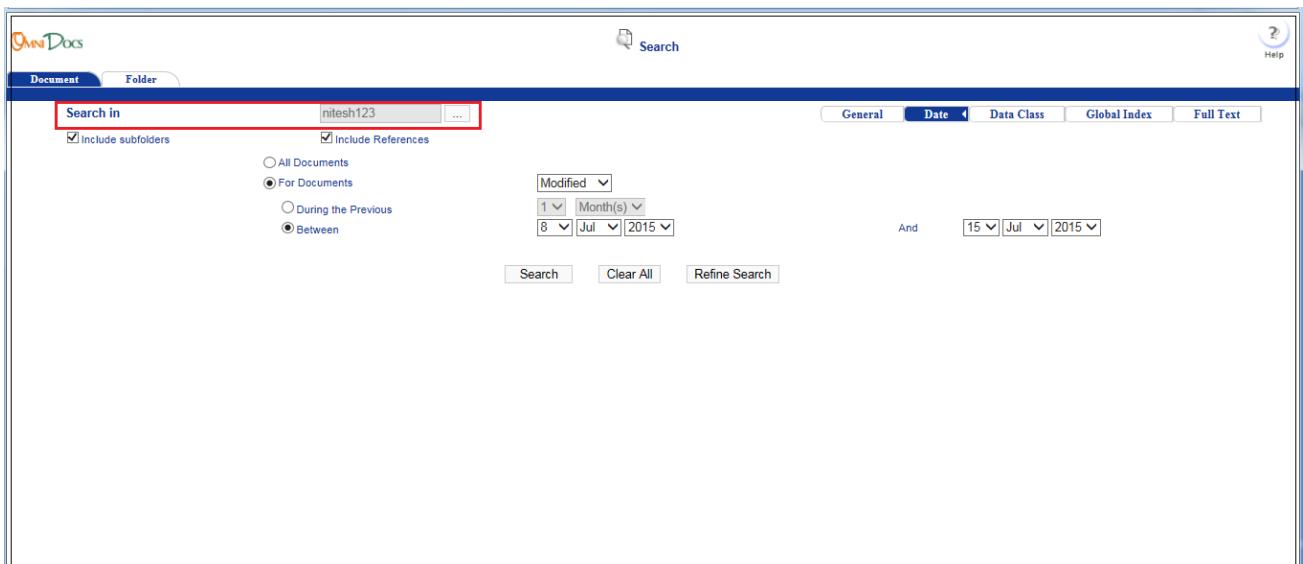


Figure: 2.214

3. **Select Folder** window pop-ups. Select a folder from the "Select Folder" window on which you need to perform a date based search. Click **OK**. Refer **Figure: 2.71**.

4. The selected folder appears in the **Search in** textbox. To perform a search on the subfolders within the folder, check-in the **Include Subfolders** check-box.
5. For performing search on all the sub-folders of a selected folder or all the folders of a selected cabinet, check-in the **All Documents** option.

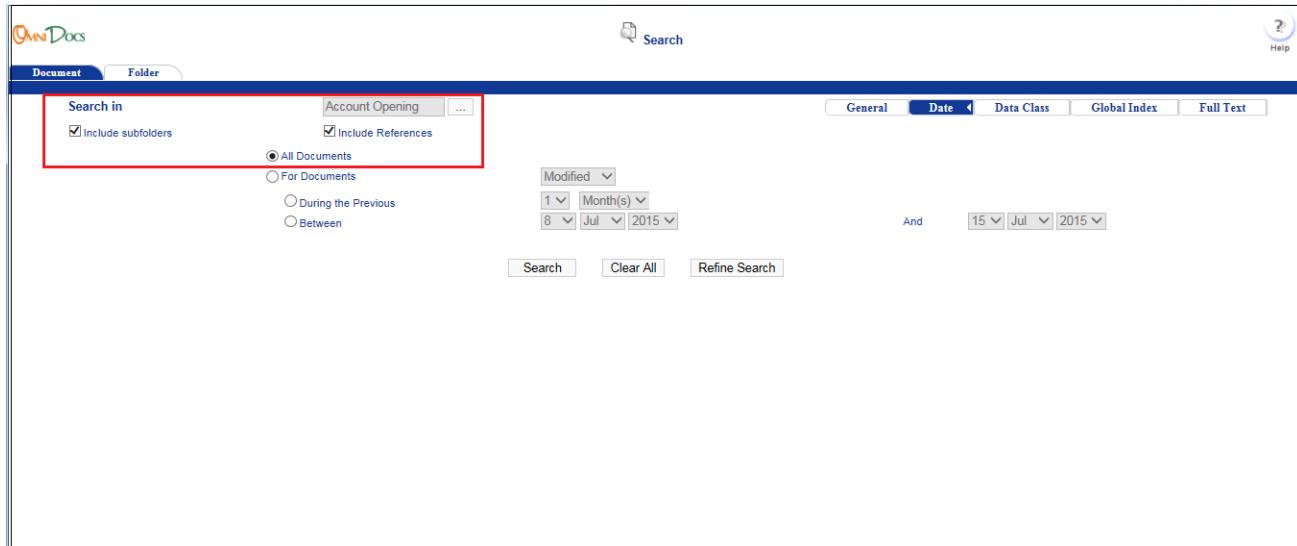


Figure: 2.215

6. Click the **For Documents** selection button and select the required option from the "For Folders" drop-down list.

Here searching is available on the basis of **Modified Date**, **Accessed Date** and **Created Date** of the documents.

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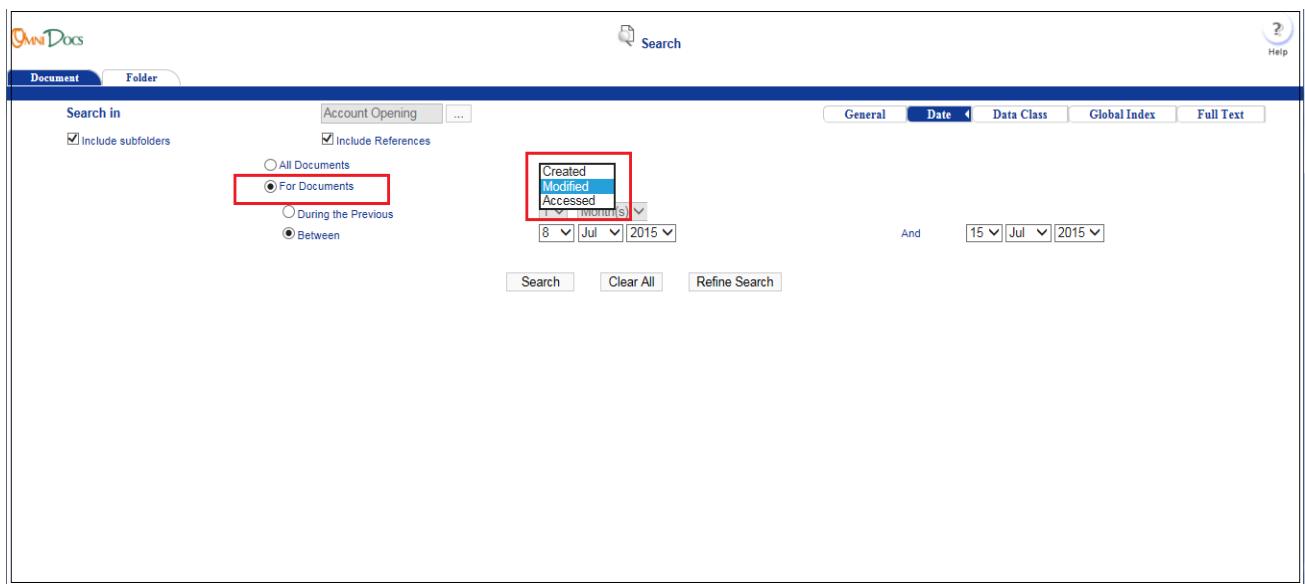


Figure: 2.216

7. Select the option **During the Previous** to search the documents during previous Months/Weeks/Days.
8. Select the option **Between** to search the documents between the specified dates.

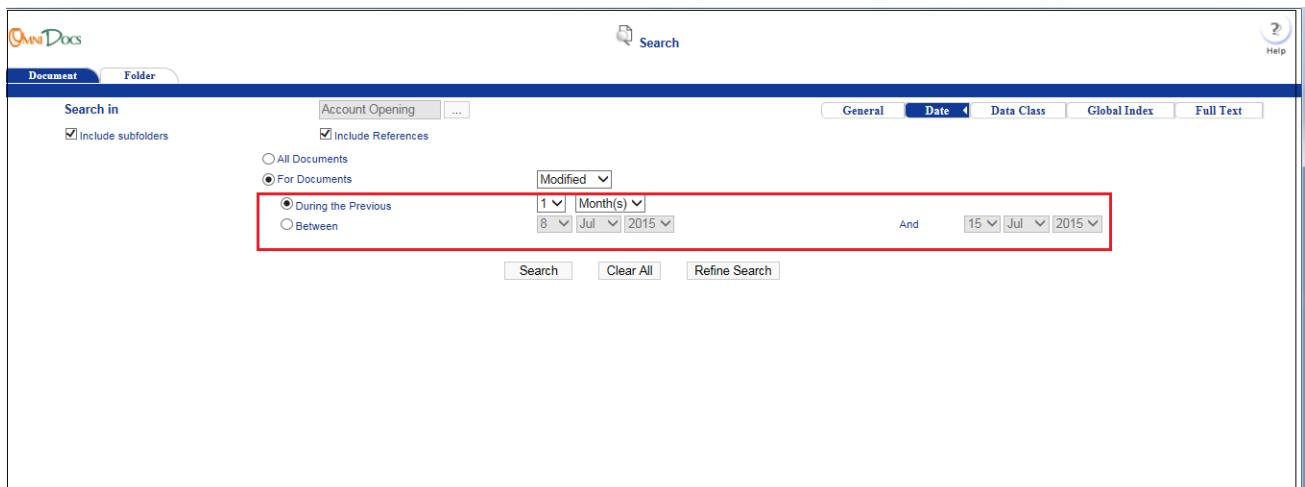


Figure: 2.217

9. In order to search the folders on a specified criteria, click the **Search** command button. The folders that satisfy the defined date search criteria appears in the **Folder Search Results** pane

10. In order to clear the defined date criteria and search results, click **Clear All** command button.

11. In order to clear the search results, click **Refine Search** command button.

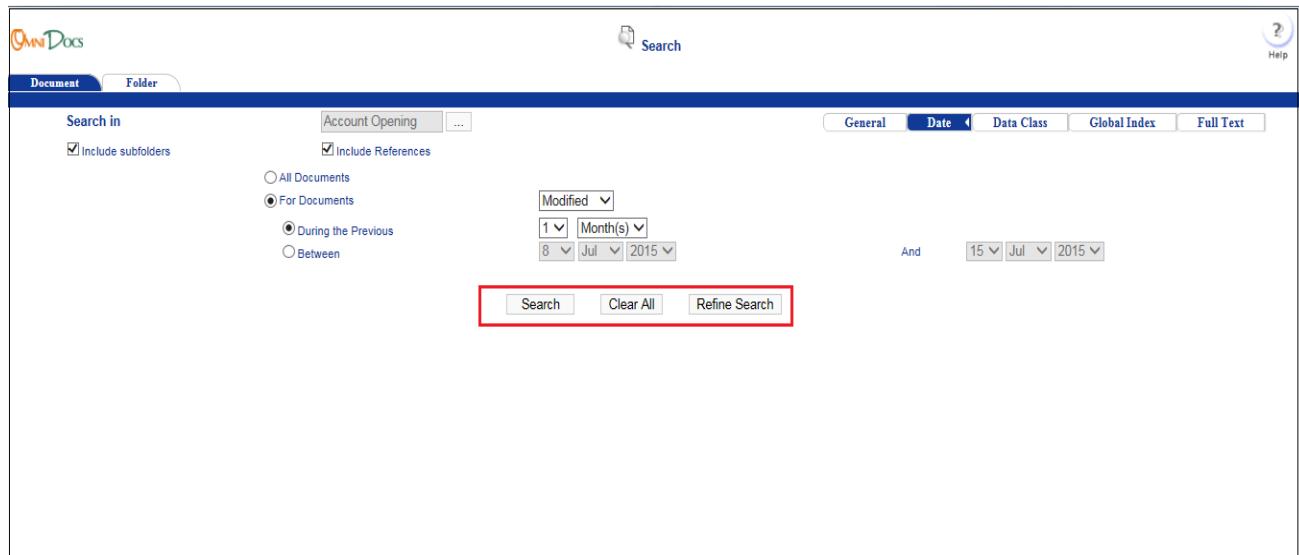


Figure: 2.218

2.6.14.5 Data Class Search

To search a document on the basis of a **data class**, proceed as follows:

1. Click the **Data Class** tab on the "Document" tab page on the "Search" screen. The Data Class tab page opens.
2. Select a folder from the **Search-in** list box.
3. You may select the **Include sub folders** option if you need to perform a search on all folders within the folder and select a data class from the Data Class list box to perform a search.

Working with OmniDocs

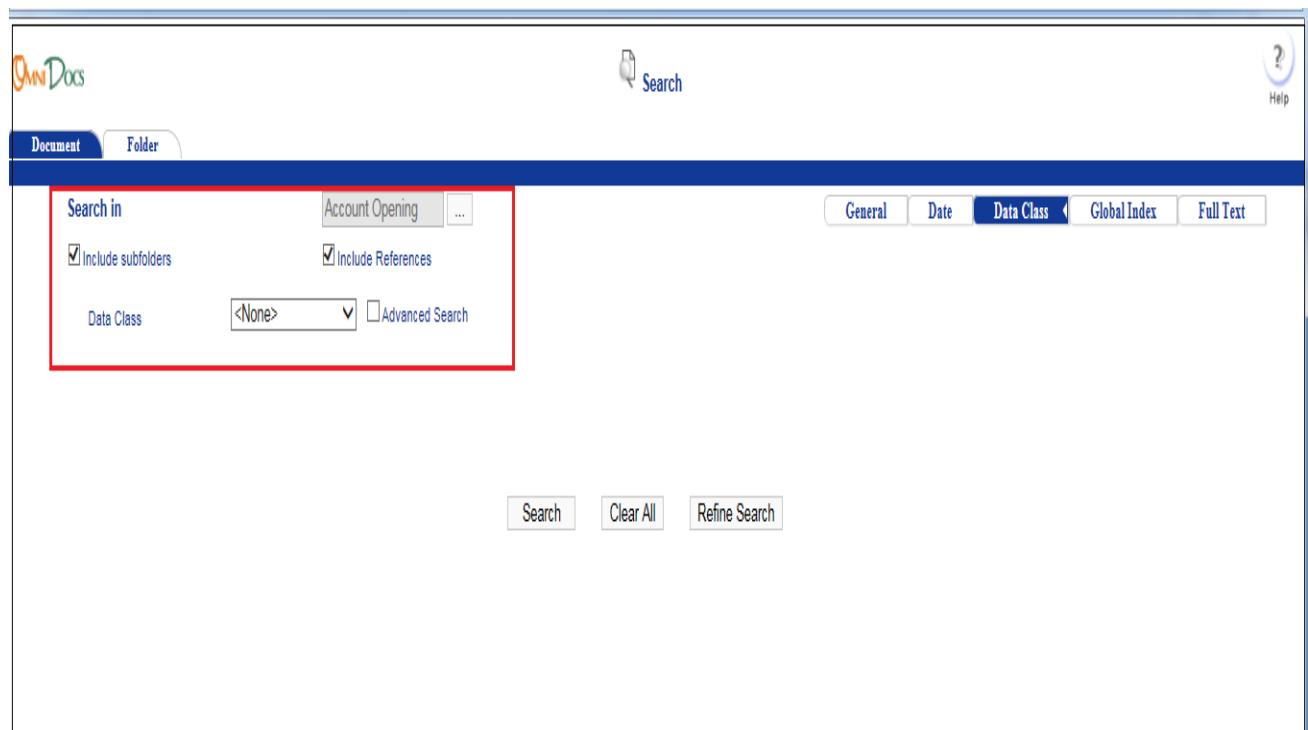


Figure: 2.219

4. The Field Name, Operator, Value are displayed.
5. Enter the required data fields.
6. Click **Search** to invoke the search results.
7. In order to clear the defined **data-class** criteria and search results, click **Clear All** command button.
8. In order to clear the search results, click **Refine Search** command button.

2.6.14.6 Global Index Search

To search the document on **global index**, follow the following steps:

1. Click the **Global Index**.
2. Select the global index from the **Global Index** combo box.

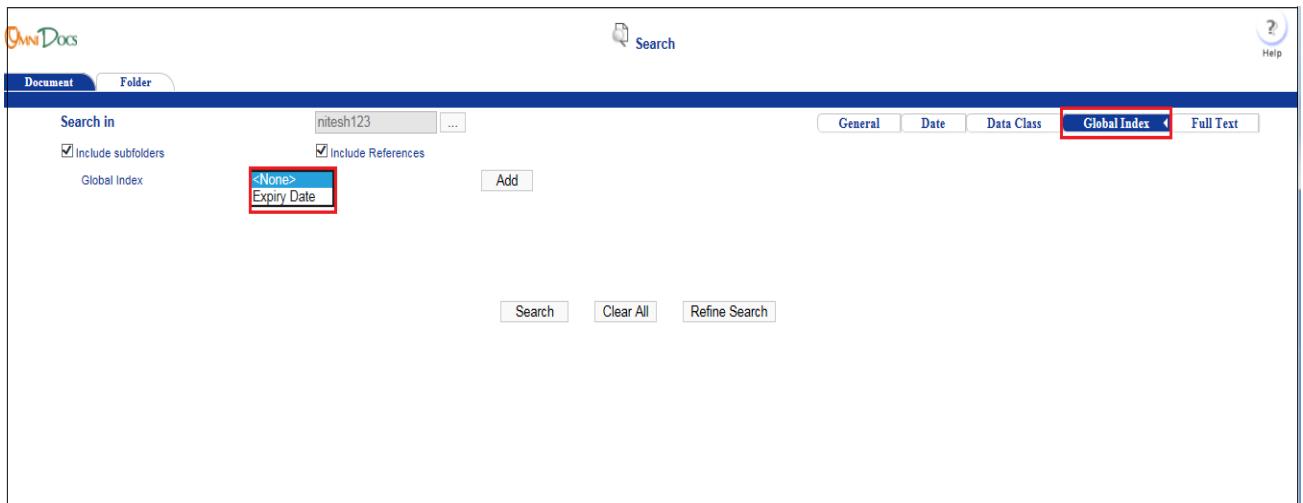


Figure: 2.220

3. Click **Add** button. The selected "Global Index" is added in the list
4. Specify the required values for the global index on which the search has to be made.
5. To begin the search, click the **Search** button.

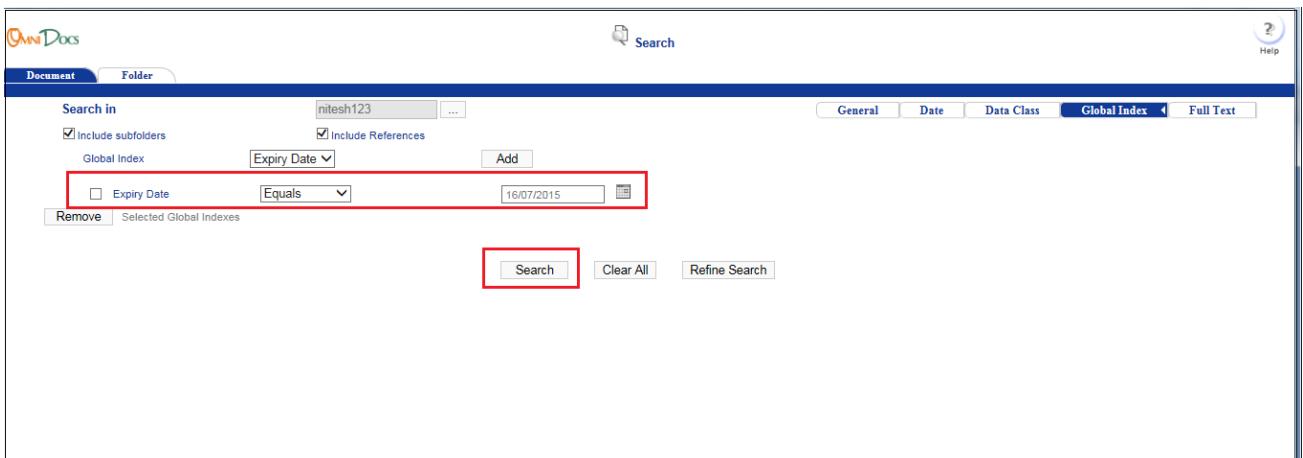


Figure: 2.221

- To delete a particular index, select it and click **Remove** button.

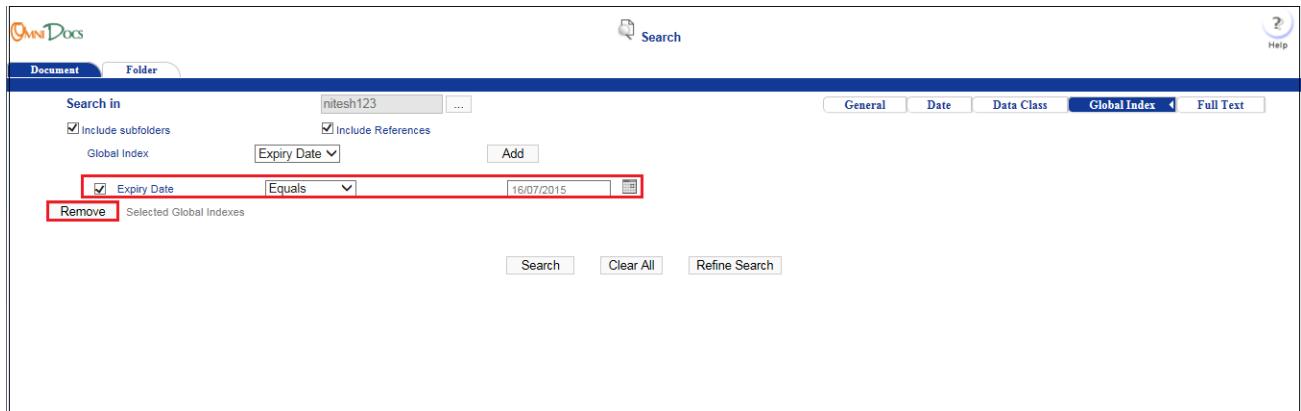


Figure: 2.222

2.6.15 Audit Log

To view **Audit Log of document**, follow the following steps

- Select a document of a particular folder and click **Audit Log** link.

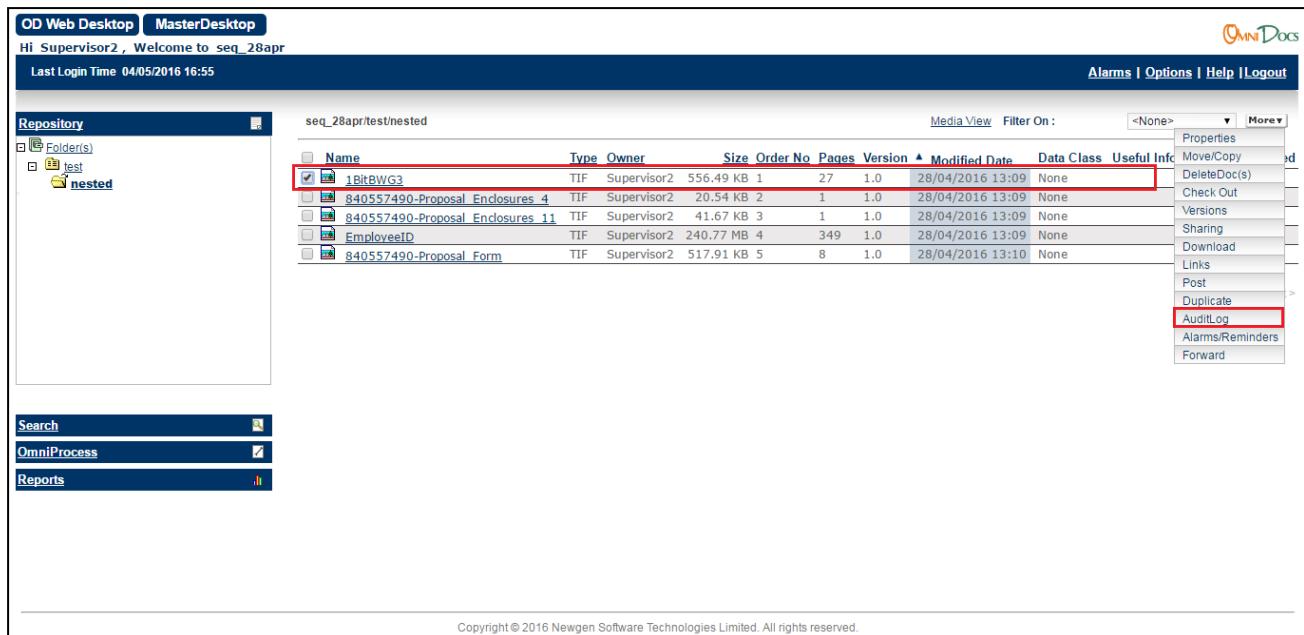


Figure: 2.223

OR

Working with OmniDocs

The screenshot shows the OmniDocs application interface. At the top, there's a navigation bar with links for Custom View, Alarms, Options, Search, Help, and Logout. Below the header, a blue banner displays "Supervisor2, Welcome to nitesh123" and "Last Login Time 15/07/2015 16:06". The main content area has a toolbar with buttons for Add Document, Add Folders, Properties, Delete Folder, Alarms / Reminders, Move / Copy, Sharing, Audit Log, and Order. On the left, there's a sidebar with a tree view of folders like Account Opening, Account Transfer, Bank Draft, Education Loan, Fixed Deposite, Home Loan, Interest Rate, Joint Account, Loan Payment, and Pension Account. The main workspace shows a list of files under "nitesh123/ Account Transfer". The table includes columns for Name, Size, Type, Pages, Modified, Owner, and Data Class. One file, "Identification", is highlighted with a red border. At the bottom, there are more buttons for Add Folders, Properties, Move / Copy, Delete Doc(s), Check Out, Check In, Audit Log (which is highlighted with a red box), Versions, Forward, Sharing, and Download.

Figure: 2.224

2. The audit log screen appears displaying the logs of the selected document. **Client Machine IP** will also be displayed in the audit trails. This will help in tracking the machine location from which the changes has been done

The screenshot shows the "Document Log" screen. At the top, there's a "Help" link. The main title is "Document Log" with a subtitle "Audit Log is an account of the operations that are performed on the specified object (viz. cabinet, folder or document) by any of the members of the cabinet." Below that, it shows "Document Log : Identification", "Folder : nitesh123/Account%20Transfer...", and "Today is: 15/07/2015". The table has columns for Action, Action Done By, Date Time, and Remarks. Two rows are listed: "Document created" by Supervisor2 on 15/07/2015 04:58, and "Document properties modified" by Supervisor2 on 15/07/2015 17:34. The "Remarks" column for the second row contains the text "Properties of Document Identification... Modified Identification|192.168.55.118|N", with the entire text highlighted by a red box. At the bottom, there are "Save AuditLog" and "Close" buttons.

Figure: 2.225

3. User can view the various operations done by other users on the documents.

The fields of Audit Log are:

- Action (Document Created)
- Action Done By (User name)
- Date Time
- Remarks

4. Click **Save AuditLog** to save the logs or click **Close** to exit from Document log window.

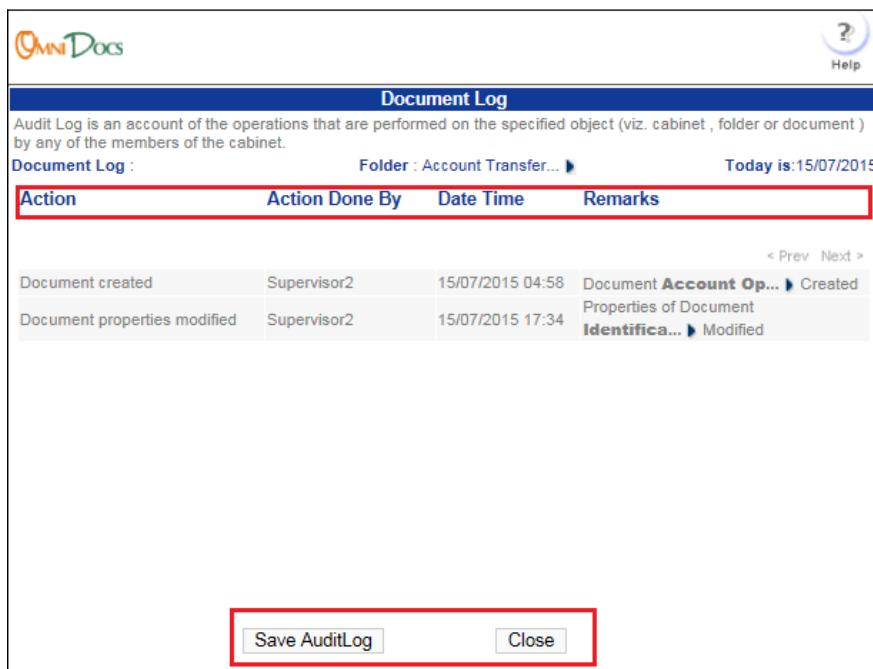


Figure: 2.226

2.6.16 Alarms/Reminders

To Set / View alarms on the document, follow the following steps:

1. To set alarms/reminders on the document, select the document from a folder, and click on the **Alarms/Reminders** link.

Working with OmniDocs

The screenshot shows the OmniDocs application interface. At the top, there's a navigation bar with links like 'Custom View', 'Alarms', 'Options', 'Search', 'Help', and 'Logout'. Below the header, a blue banner displays 'Supervisor2, Welcome to nitesh123' and 'Last Login Time 15/07/2015 16:06'. On the left, a sidebar lists 'Inbox' and 'Trash' under 'OmniDocs', followed by a tree view of 'Folder(s)' containing 'Account Opening' and 'Account Transfer'. Under 'Account Transfer', items like 'Bank Draft', 'Education Loan', etc., are listed. The main content area shows a table of documents in 'nitesh123/ Account Transfer'. One row, 'Photo ID', has a checked checkbox and is highlighted with a red border. The table columns include Name, Size, Type, Pages, Modified, Owner, and Data Class. A toolbar at the bottom includes buttons for 'Add Document', 'Add Folders', 'Properties', 'Delete Folder', 'Alarms / Reminders', 'Move / Copy', 'Sharing', 'Audit Log', and 'Order'. The 'Alarms / Reminders' button is specifically highlighted with a red box.

Figure: 2.227

OR

The screenshot shows the DD Web Desktop interface. At the top, it says 'Hi Supervisor2, Welcome to seq_28apr' and 'Last Login Time 04/05/2016 16:55'. On the left, a sidebar shows 'Repository' with 'test' and 'nested' selected. The main content area displays a table of files in 'seq_28apr/test/nested'. One file, '1bitBWG3', has a checked checkbox and is highlighted with a red border. The table columns include Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, and Useful Info. A toolbar at the bottom includes buttons for 'Media View', 'Filter On', 'Properties', 'Move/Copy', 'DeleteDoc(s)', 'Check Out', 'Versions', 'Sharing', 'Download', 'Links', 'Post', 'Duplicate', 'AuditLog', 'Alarms/Reminders', and 'Forward'. The 'Alarms/Reminders' button is specifically highlighted with a red box.

Figure: 2.228

2. The **Alarms/ reminders** screen appears; by default **Alarms** tab appears selected.
3. Select the name of the user to be notified by clicking the ellipsis button besides the **Notify** combo-box.

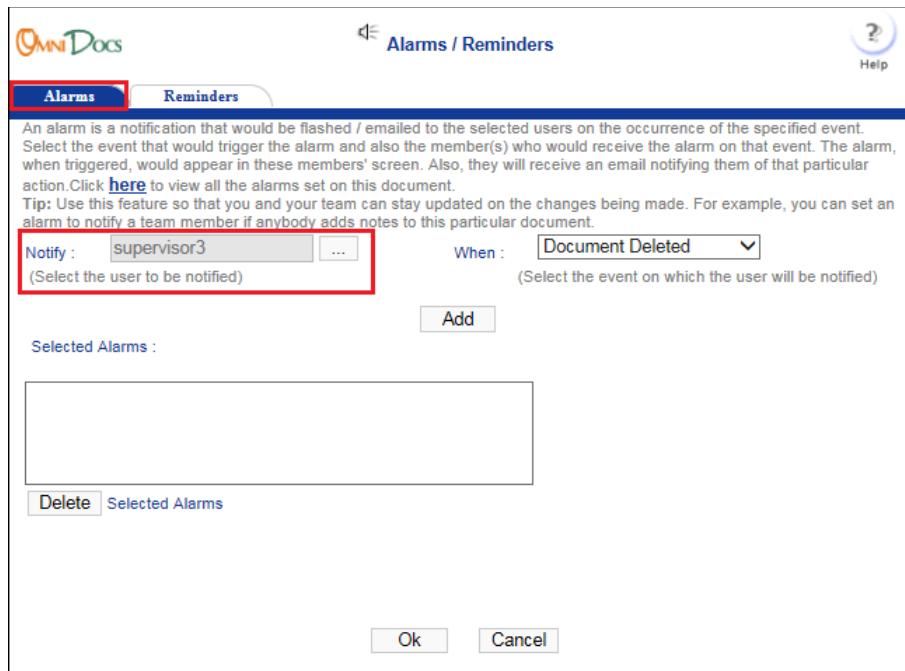


Figure: 2.229

4. Click the ellipsis button beside '**When**' textbox and select instant for alarm

Different types of document level alarms which can be set on folder are listed below:

- **Document Deleted** – When any document will be deleted from this folder alarm will generated for specified user.
- **Notes Added** – When notes will be added to any document of this folder alarm will be generated for specified user.
- **Document Moved** – When any document will moved/copied to some other location from his folder alarm will be generated for specified user.
- **Document Renamed** – When any document from this folder will be renamed alarm will be generated for specified user.
- **Document Shared** – When any document will be shared from this folder alarm will be generated for specified user.
- **Document Checked Out** – When any document will be checked out from this folder alarm will be generated for specified user.

- **Document Checked In** – When any document will be checked in to this folder alarm will be generated for specified user.

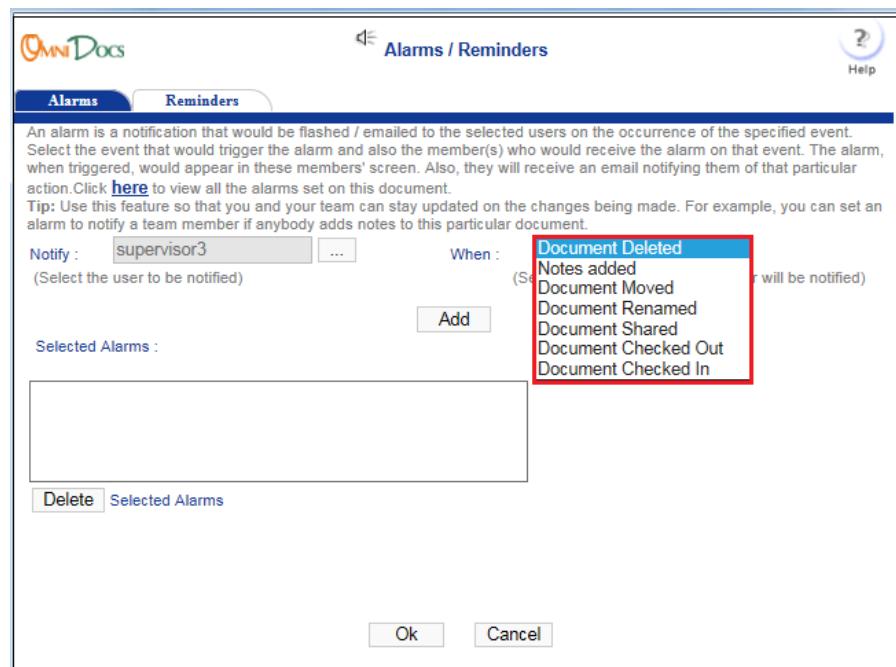


Figure: 2.230

5. Click **Add** button to set the alarm. The status of alarms will display on the **Selected Alarms** textbox.
6. To save an alarm, click the **OK** button, else click the **Cancel** button.

Working with OmniDocs

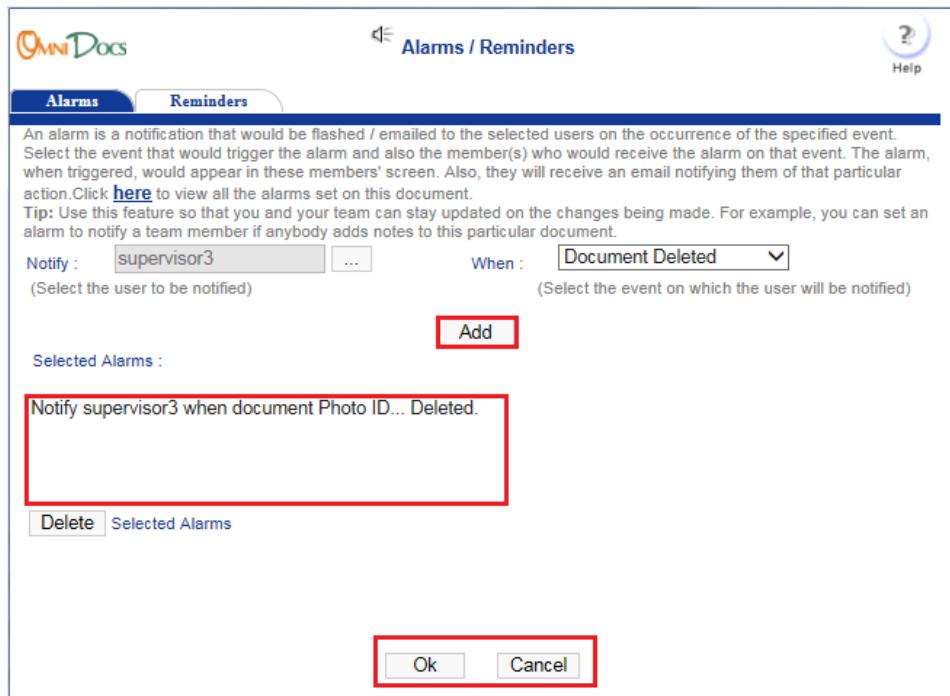


Figure: 2.231

7. Click the **Delete** button to delete the selected alarms.

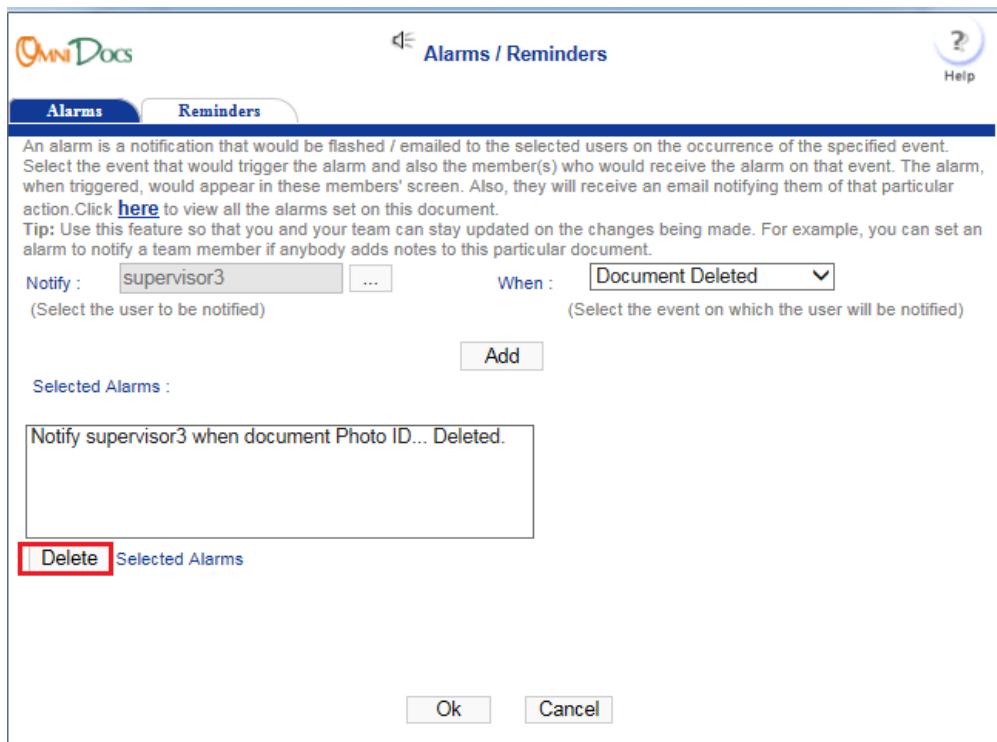


Figure: 2.232

8. To view all the alarms on the folder, click **here** link on the Alarms screen.

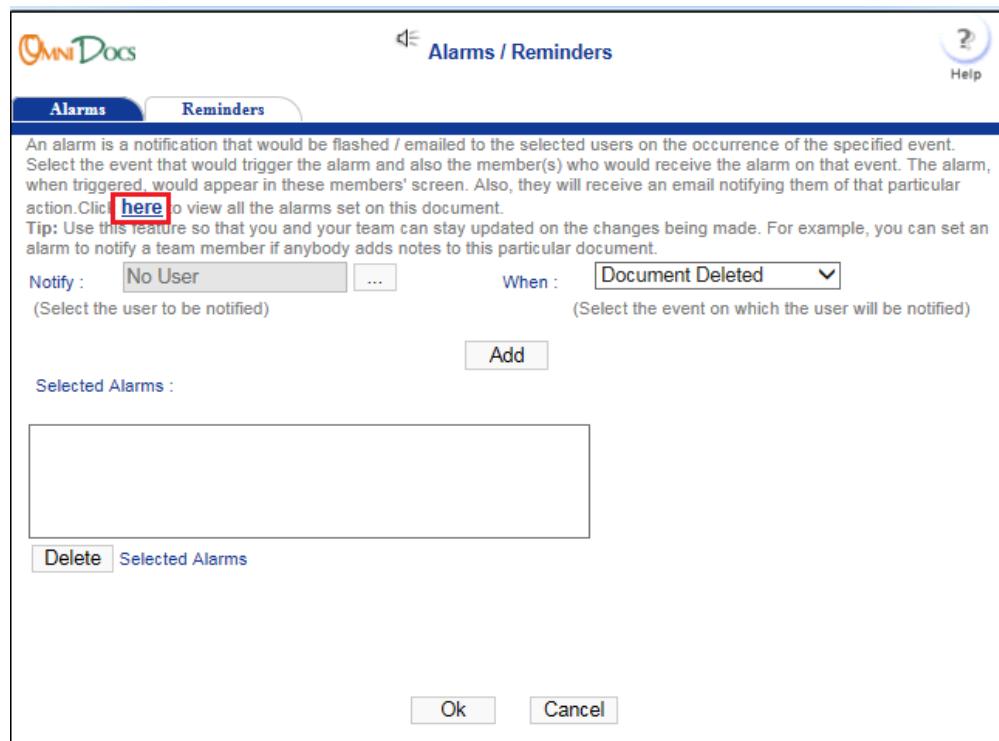


Figure: 2.233

9. The **View All Alarms** screen opens.

10. To delete the alarm, select it and click on the **Delete** link else click **Cancel**.

Working with OmniDocs

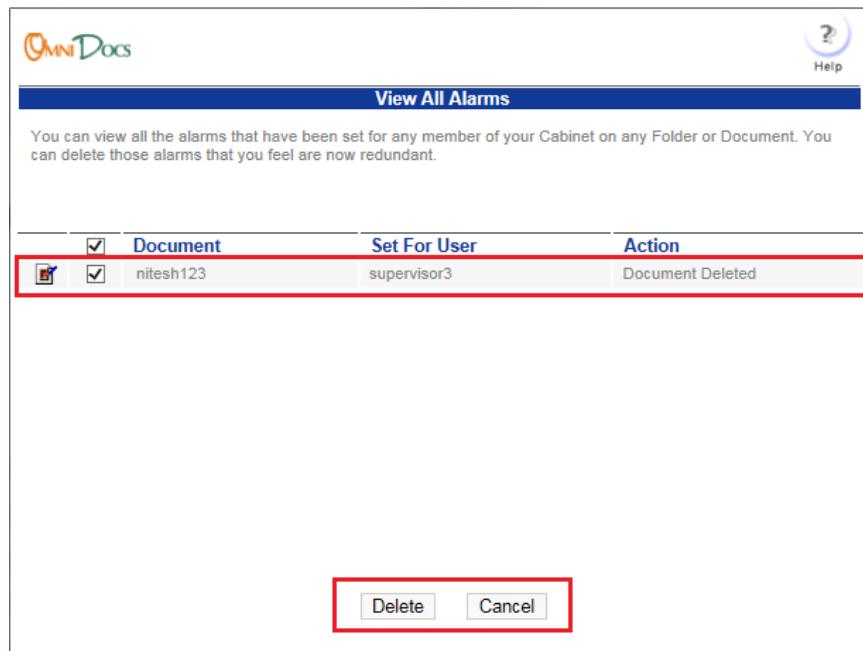


Figure: 2.234

11. Click on **Reminders** tab to set reminder on a document.
12. Select the name of the user to be reminded by clicking the ellipsis button besides the **Remind** combo-box.

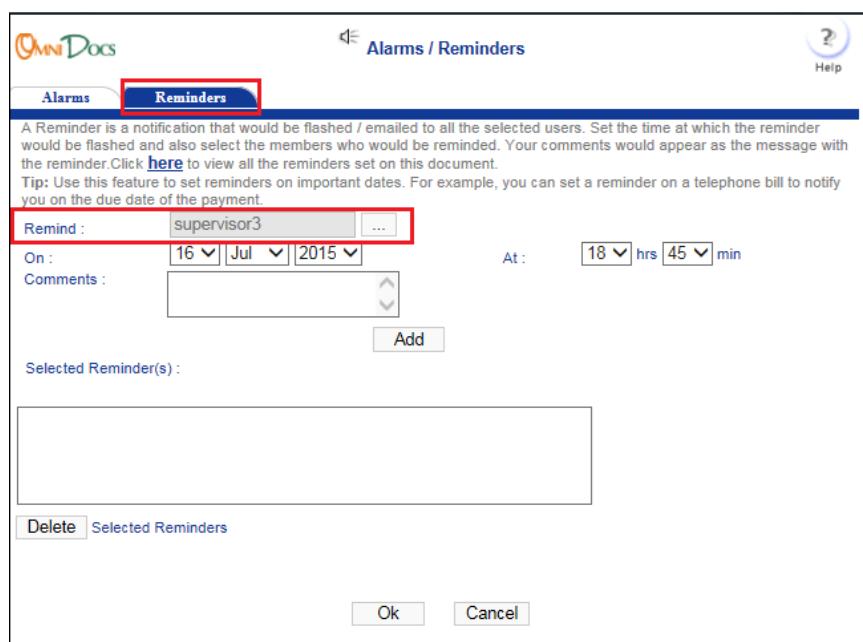


Figure: 2.235

Working with OmniDocs

13. Schedule the Reminder by '**On**' and '**At**' selection boxes.
14. Add comments in the **Comments** textbox. Click **Add** to add reminder.

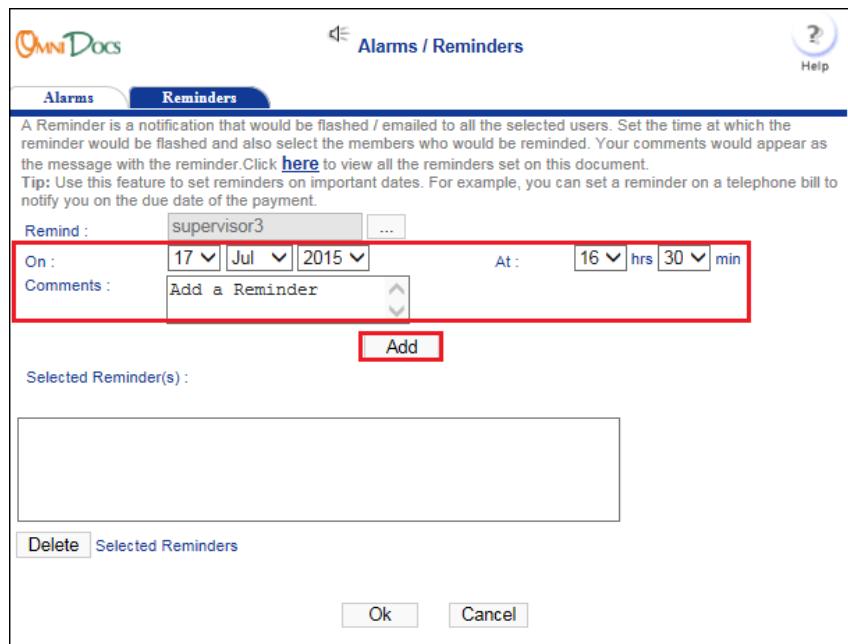


Figure: 2.236

15. The selected Reminders will display in the **Selected Reminders** textbox. Click **OK** to add else click **Cancel**.

Working with OmniDocs

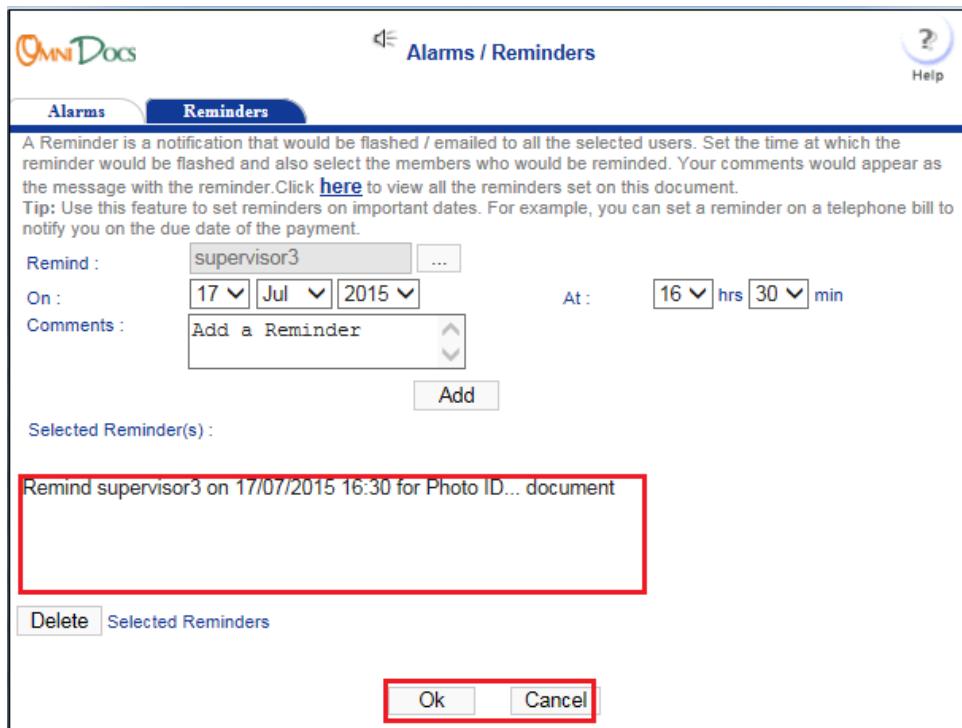


Figure: 2.237

16. To view all the reminders on the folder, click **here** link on the **Reminders** screen.

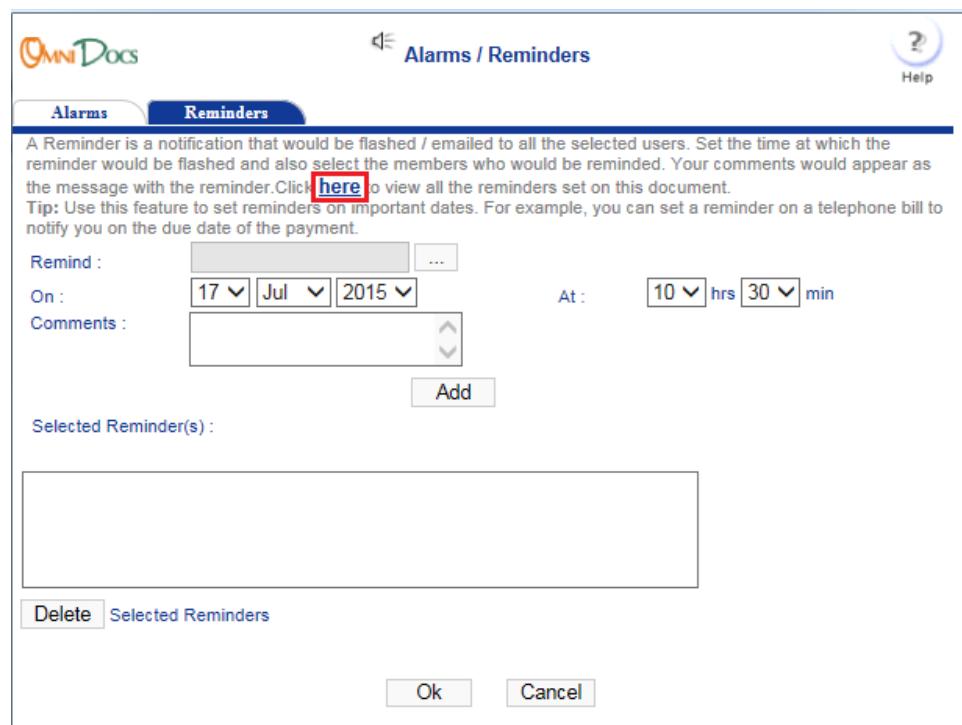


Figure: 2.238

17. The **View All Reminders** screen displaying all the reminders appears. To delete a reminder. Elect it and click **Delete** else, click **Cancel**.

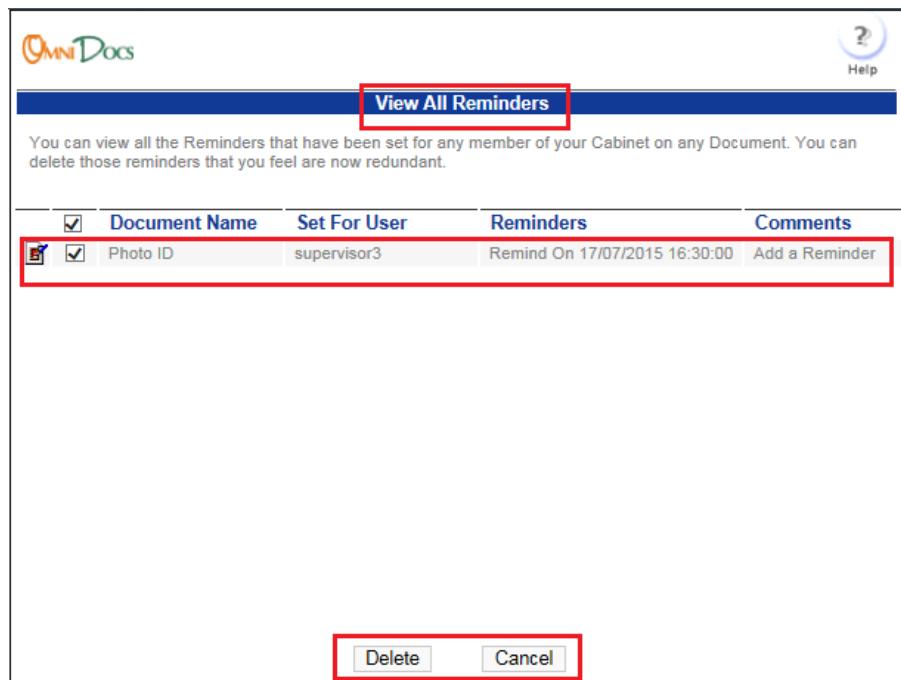


Figure: 2.239

2.6.17 Forwarding Document

To forward a document, follow the following steps:

1. Select the document to forward, click on **Forward** link.

Working with OmniDocs

The screenshot shows the OmniDocs web interface. At the top, there's a header bar with the OmniDocs logo, user information ('Supervisor2, Welcome to nitesh123'), and standard navigation links like 'Custom View', 'Alarms', 'Options', 'Search', 'Help', and 'Logout'. Below the header is a dark blue banner with the message 'Supervisor2, Welcome to nitesh123' and 'Last Login Time 17/07/2015 14:17'. The main content area has a left sidebar with a tree view of folders: 'Inbox', 'Trash', 'Folder(s)', 'Account Opening' (which is expanded), 'Bank Draft', 'Education Loan', 'Fixed Deposite', 'Home Loan', 'Interest Rate', 'Joint Account', 'Loan Payment', and 'Pension Account'. To the right of the sidebar is a large table listing documents. The table columns are: Name, Size, Type, Pages, Modified, Owner, and Data Class. One row, 'Photo ID', is highlighted with a red border. At the bottom of the page are several buttons: 'Add Document', 'Add Folders', 'Properties', 'Delete Folder', 'Alarms / Reminders', 'Move / Copy', 'Sharing', 'Audit Log', 'Order', 'Add Folders', 'Properties', 'Links', 'Move / Copy', 'Post', 'Delete Doc(s)', 'Duplicate', 'Check Out', 'Check In', 'Audit Log', 'Versions', 'Forward', 'Sharing', and 'Download'. The 'Forward' button is also highlighted with a red border.

Figure: 2.240

OR

The screenshot shows the OD Web Desktop interface. At the top, there's a header bar with the title 'OD Web Desktop' and 'MasterDesktop', user information ('Hi Supervisor2, Welcome to seq_28apr'), and standard navigation links like 'Alarms', 'Options', 'Help', and 'Logout'. Below the header is a dark blue banner with the message 'Hi Supervisor2, Welcome to seq_28apr' and 'Last Login Time 04/05/2016 16:55'. The main content area has a left sidebar with a tree view of folders: 'Repository', 'Folders(s)', 'test' (which is expanded), and 'nested'. To the right of the sidebar is a table listing files. The table columns are: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, and Useful Info. One file, '1bitBWG3', is highlighted with a red border. At the bottom of the page are several buttons: 'Media View', 'Filter On: <None>', 'More', 'Properties', 'Move/Copy', 'DeleteDoc(s)', 'Check Out', 'Versions', 'Sharing', 'Download', 'Links', 'Post', 'Duplicate', 'AuditLog', 'Alarms/Reminders', and 'Forward'. The 'Forward' button is highlighted with a red border.

Figure: 2.241

NOTE:

The user can select multiple documents for forwarding.

2. The **Forward** screen appears.

3. Enter the fields in the required textbox

- **To:** User name to which document is sent.
- **Cc:** Mark a copy to another user
- **Subject:** Enter subject of the mail
- **Message:** Type mail

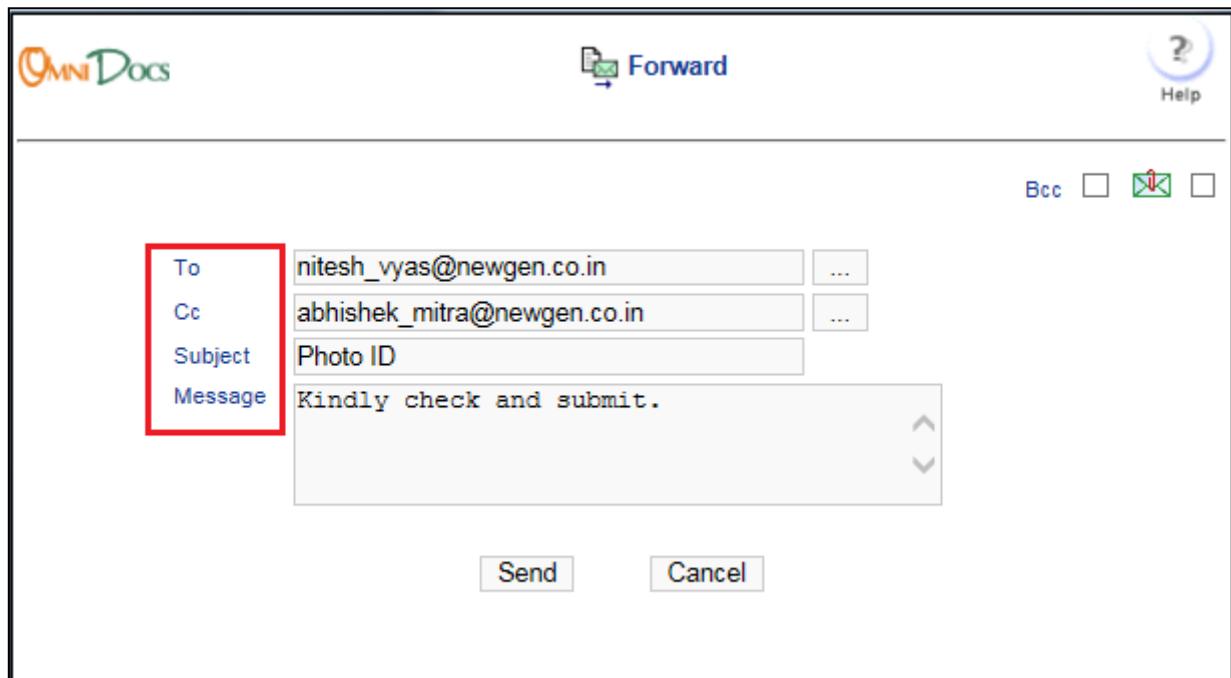


Figure: 2.242

4. In order to enable **Bcc** and **Show Attachment** textboxes, check-in to their respective Check-boxes as shown

Bcc: Mark a copy to undisclosed recipient

Attach: Display the attached content

Working with OmniDocs

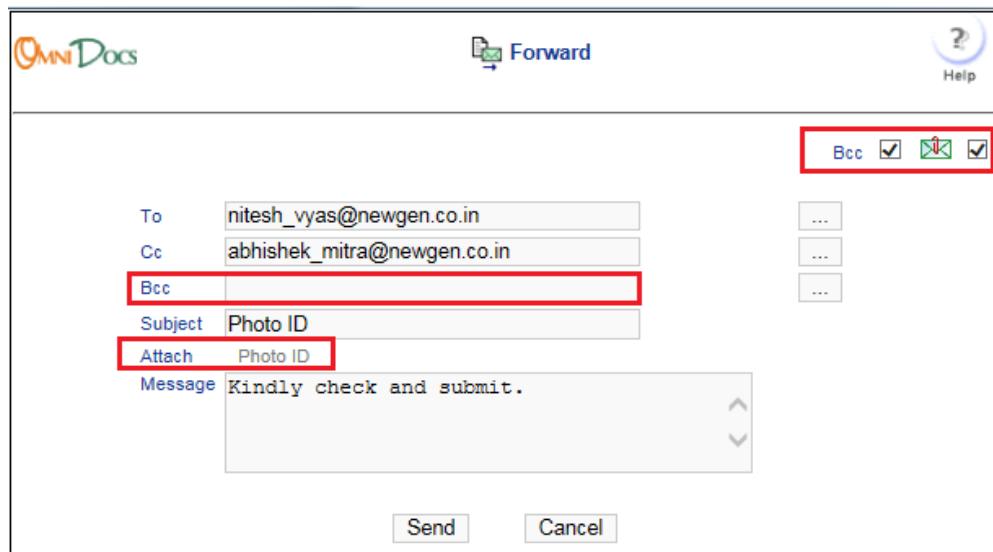


Figure: 2.243

5. Click **Send** to send forward else click **Cancel** button to close the window without forwarding the document.

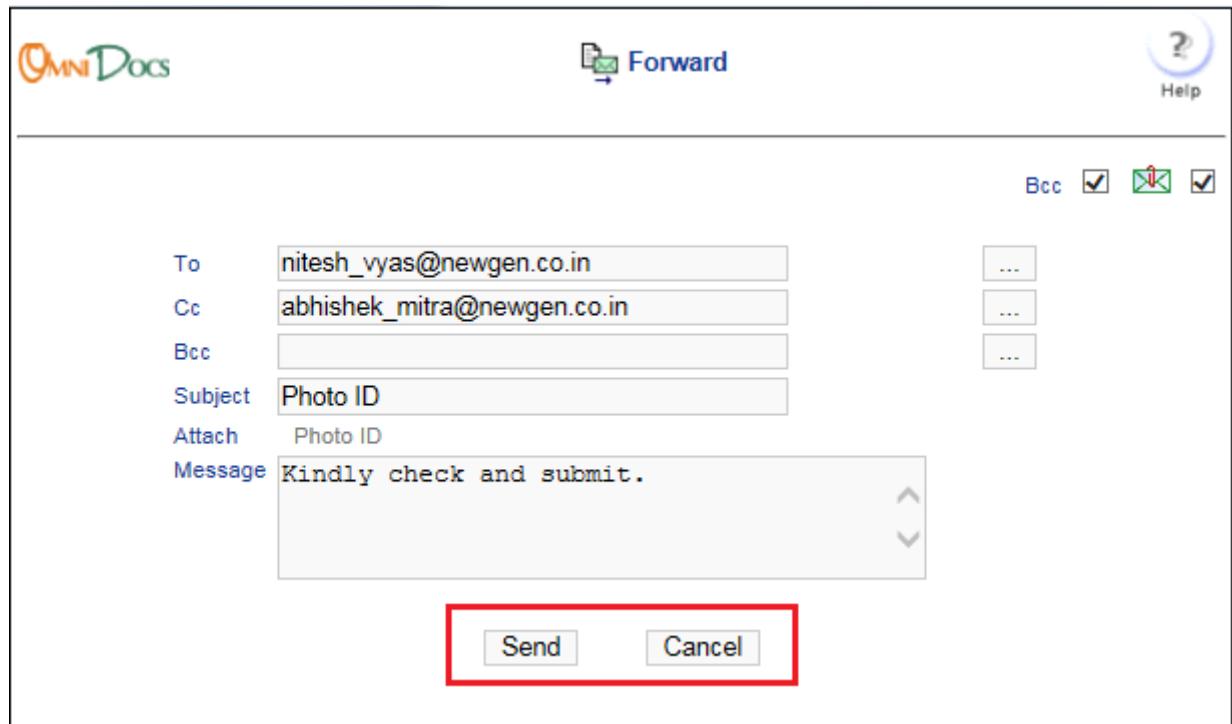


Figure: 2.244

2.6.18 Printing Document

To Print Document(s), follow the following steps:

1. Select the document to print. Click on **Print** link.

The screenshot shows the OmniDocs web interface. At the top, there's a navigation bar with links for Custom View, Alarms, Options, Search, Help, and Logout. Below the header, a blue banner displays 'New User Welcome to nitesh123' and 'Last Login Time 17/07/2015 13:41'. The main area has a left sidebar with a tree view of folders like 'Folder(s)', 'Account Opening', 'Account Transfer', etc. The right side shows a list of documents in the 'nitesh123/ Account Transfer' folder. One document, 'Accounts Payable', is selected and highlighted with a red box. The 'Print' button at the bottom of the list table is also highlighted with a red box. The bottom of the screen features a toolbar with various document management links.

Figure: 2.245

OR

The screenshot shows the OD Web Desktop interface. At the top, it says 'OD Web Desktop | MasterDesktop', 'Hi Supervisor , Welcome to Zurich_test2', and 'Last Login Time 05/05/2016 12:03'. The right side shows a list of documents in the 'zurich_test/Employee Records/w/Personal Documents' folder. One document, 'Declarations', is selected and highlighted with a red box. A context menu is open over the document, with the 'Print' option highlighted with a red box. The bottom of the screen features a toolbar with various document management links.

Figure: 2.246

2. The **Print** link, pops-up the following screen
3. The screen displays the **Total number of Pages** in the document; select **All Pages** to print or **Select Page Range** to print.

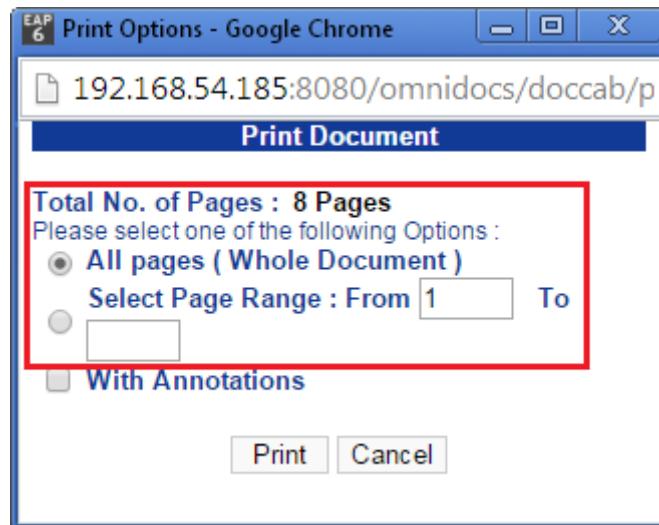


Figure: 2.247

4. User can choose to print the document with annotations by clicking on the **With Annotations** check box.

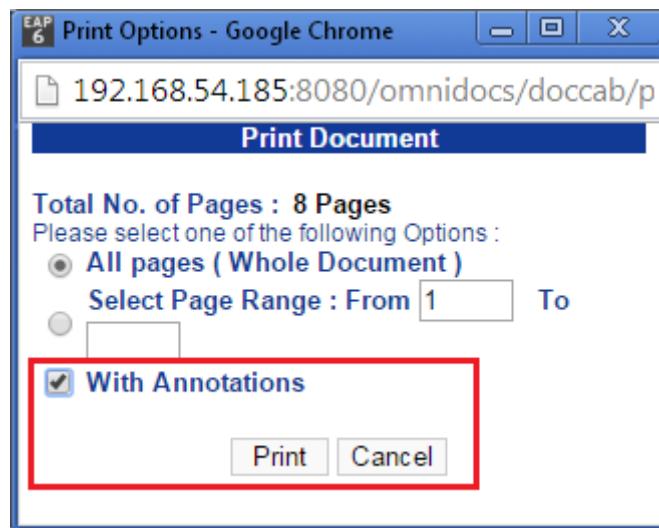


Figure: 2.248

NOTE:

[Section 2.6.18 – Printing Document\(s\)](#) is valid only when **JRE Free Mode** is **disabled**. That by default (when **JRE Free Mode is enabled**), the **Print** document option will be disabled.

2.7 Working with Trash

Folders and documents when deleted are moved to the **trash**.

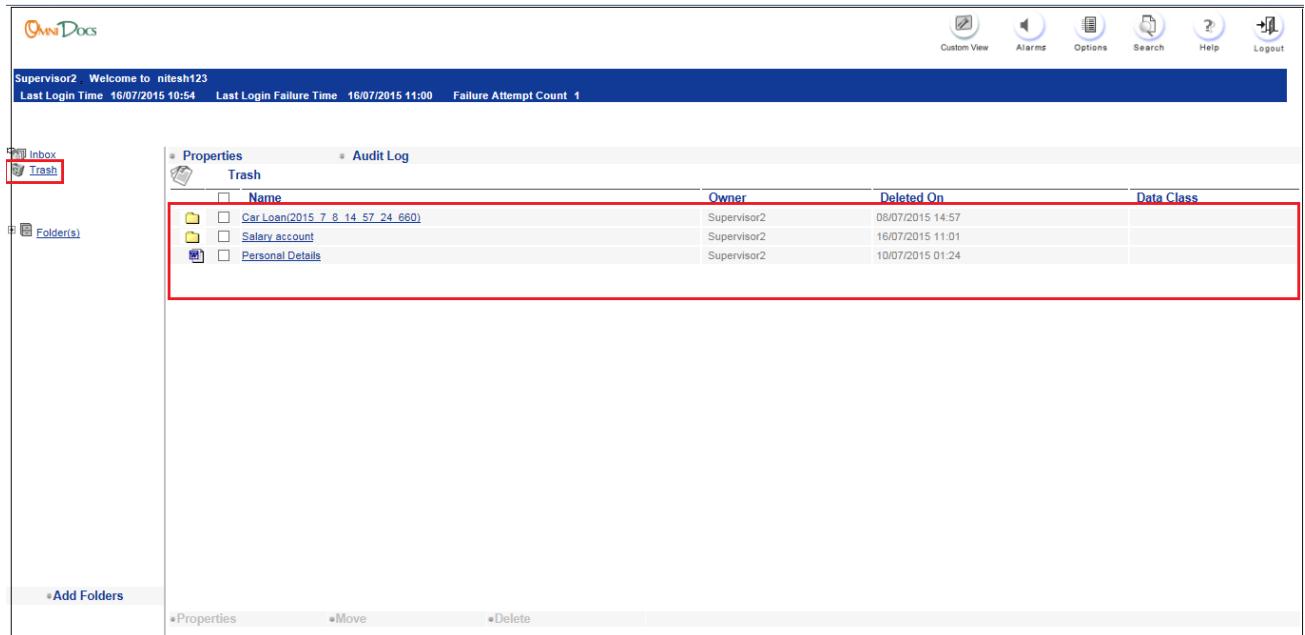
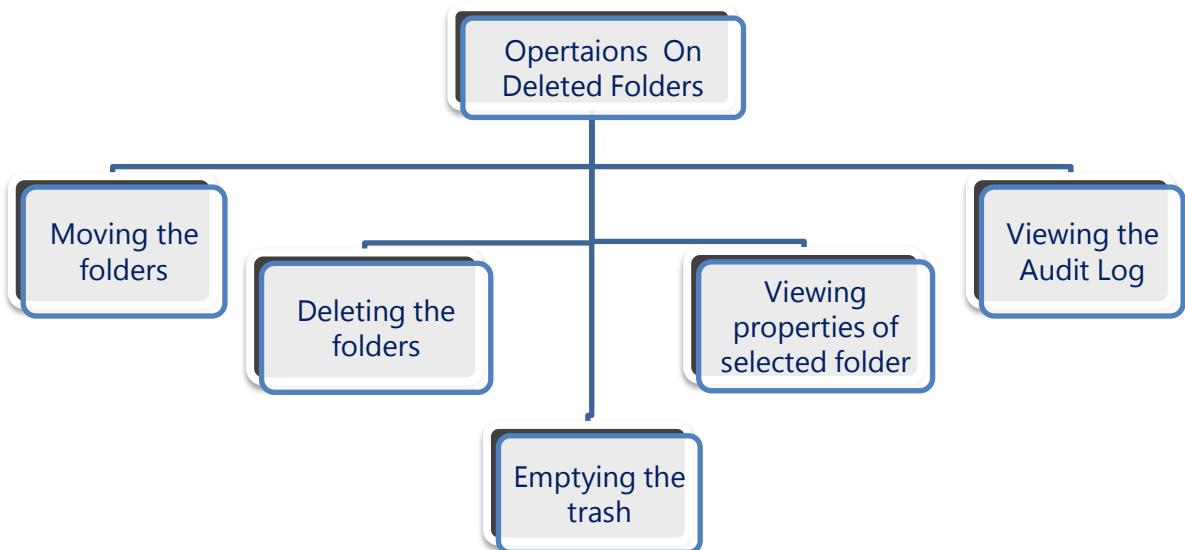


Figure: 2.249

Various operations can be performed on the deleted folders.



2.7.1 Moving Folder(s) from Trash

1. Select the required folder that has to be move and click **Move** link.

The screenshot shows the OmniDocs application interface. On the left, there's a sidebar with links for 'Inbox', 'Trash', and 'Folder(s)'. The main area displays a table titled 'Properties' for the 'Trash' folder. The table has columns for 'Name', 'Owner', 'Deleted On', and 'Data Class'. Under 'Name', there are three entries: 'Car Loan(2015_7_8_14_57_24_660)' (unchecked), 'Salary account' (checked and highlighted with a red box), and 'Personal Details' (unchecked). At the bottom of the table are buttons for 'Properties', 'Move' (highlighted with a red box), and 'Delete'.

Figure: 2.250

2. The **Move Folders** screen is appears.
3. Select the folder where the deleted folder has to be moved by clicking on the **Select Folder** link.

The screenshot shows the 'Move Folder(s)' dialog box. It has a title bar 'Move Folder(s)' and a subtitle 'Move this folder(s) to any other folder in your cabinet.' Below this, there are two sections: 'Folder(s)' and 'From Folder'. In the 'From Folder' section, the 'Select Folder' link is highlighted with a red box. To the right, there are three options: 'Salary account', 'Trash', and 'Root Folder'. At the bottom are 'Move' and 'Cancel' buttons.

Figure: 2.251

4. The **Select Folder** window appears. Select a root folder.
5. Click the **OK** button to move the folder else click **Cancel**.

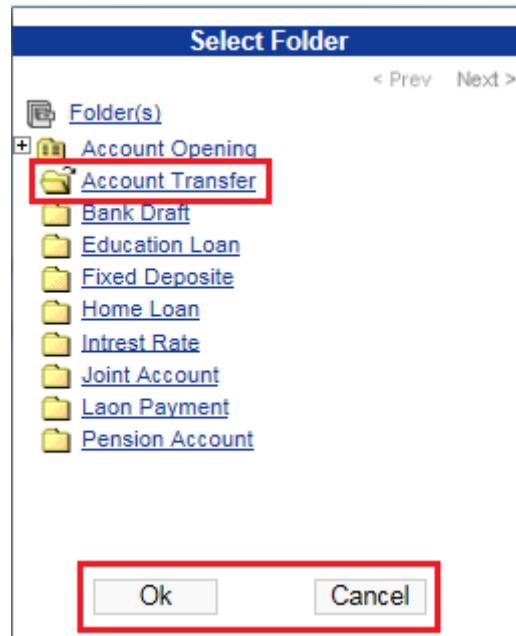


Figure: 2.252

2.7.2 Deleting Folder(s) from Trash

1. Select the folder that needs to be deleted. Click the **Delete** link.

The screenshot shows the OmniDocs application interface. At the top, there is a header bar with the text 'Supervisor2, Welcome to nilesh123' and some system status information: 'Last Login Time 16/07/2015 10:54', 'Last Login Failure Time 16/07/2015 11:00', and 'Failure Attempt Count 1'. To the right of the header are several icons: 'Custom View', 'Alarms', 'Options', 'Search', 'Help', and 'Logout'. On the left side, there is a sidebar with icons for 'Inbox', 'Trash' (which is selected), and 'Folder(s)'. The main content area has tabs for 'Properties' and 'Audit Log'. Under the 'Properties' tab, there is a 'Trash' section. It contains a table with three rows. The first row is for a folder named 'Car Loan(2015_7_8_14_57_24_660)' with owner 'Supervisor2' and deleted on '08/07/2015 14:57'. The second row is for a folder named 'Salary account' with owner 'Supervisor2' and deleted on '16/07/2015 11:01'. This row is highlighted with a red box. The third row is for a folder named 'Personal Details' with owner 'Supervisor2' and deleted on '10/07/2015 01:24'. At the bottom of the trash section, there are buttons for 'Add Folders', 'Properties', 'Move', and 'Delete'. The 'Delete' button is also highlighted with a red box.

Figure: 2.253

2. A message box appears prompting whether you want to remove the selected folder or not. Click **OK** to delete the selected folder else click **Cancel**.

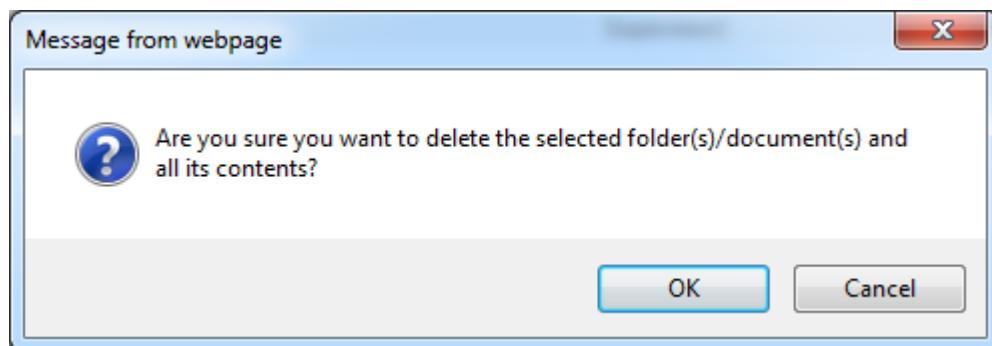


Figure: 2.254

2.7.3 Viewing Folder(s) Properties from Trash

1. Select the folder whose properties have to be viewed. Click the **Properties** link.

The image shows the OmniDocs application interface. On the left, there is a navigation sidebar with links for "Inbox", "Trash", and "Folder(s)". Under "Folder(s)", there is a list of sub-folders: "Account Opening", "Bank Draft", "Education Loan", "Fixed Deposite", "Home Loan", "Interest Rate", "Joint Account", "Loan Payment", and "Pension Account". In the center, there are two tabs: "Properties" and "Audit Log". The "Properties" tab is active and displays a table with columns: "Name", "Owner", "Deleted On", and "Data Class". The table has three rows:
1. Name: Car Loan(2015_7_8_14_57_24_660), Owner: Supervisor2, Deleted On: 08/07/2015 14:57
2. Name: Salary account, Owner: Supervisor2, Deleted On: 16/07/2015 11:01 (This row is highlighted with a red border)
3. Name: Personal Details, Owner: Supervisor2, Deleted On: 10/07/2015 01:24
At the bottom of the "Properties" tab, there are buttons for "Properties", "Move", and "Delete". The "Properties" button is highlighted with a red box.

Figure: 2.255

2. The **Folder Properties** screen is invoked in a read only mode.

3. The **General** tab displays the name of the folder, the number of sub folders, the created and modified date time, rights on the particular folder, data class, comments, the owner of the folder, the number of objects when the folder was last accessed and the FTS status, Auto Versioning whether enabled or disabled.

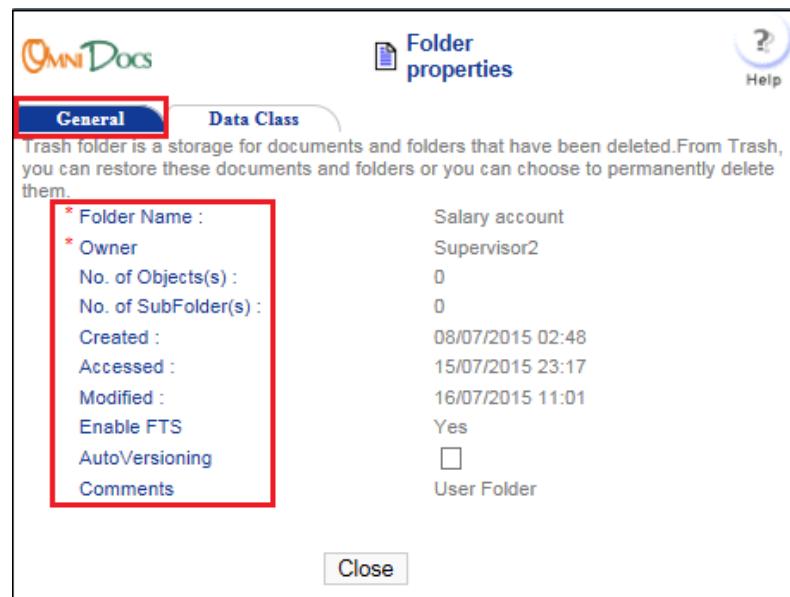


Figure: 2.256

4. The **Data Class** tab displays the dataclass attached with the selected folder. If no data class was associated to the folder, screen displays a message; "**No Data Class is associated**". Click **Close** to close the screen.

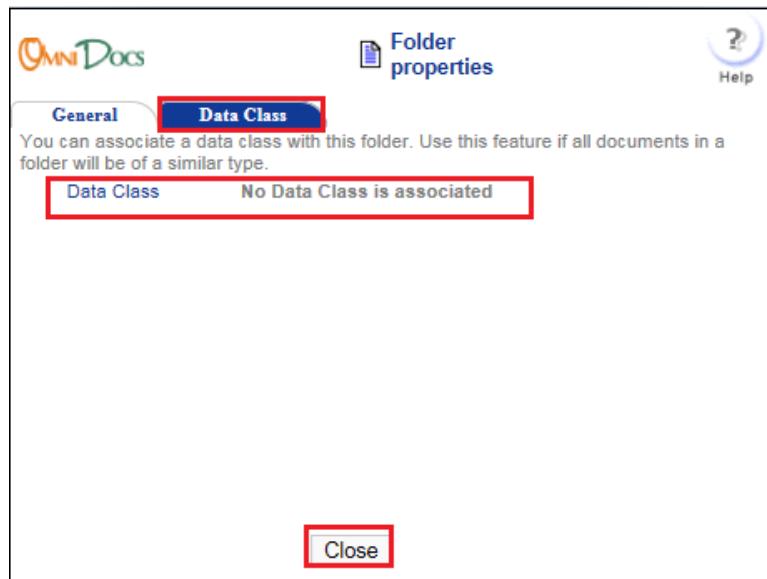


Figure: 2.257

NOTE:

The folder properties can be viewed by clicking the required folder name (hyperlink) present in the trash folder.

2.7.4 Moving Document(s) from Trash

Select the required **document(s)** instead of **folder(s)** and follow the steps described in Section [2.7.1 – Moving Folder\(s\) from Trash](#).

2.7.5 Deleting Document(s) from Trash

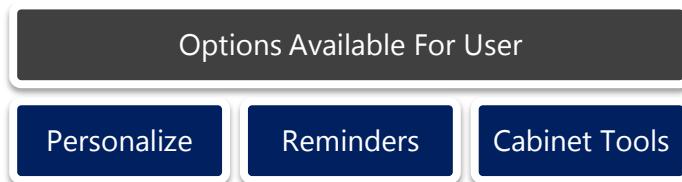
Select the required **document(s)** instead of **folder(s)** and follow the steps described in Section [2.7.2 – Deleting Folder\(s\) from Trash](#).

2.7.6 Viewing Documents(s) Properties from Trash

Select the required **document(s)** instead of **folder(s)** and follow the steps described in Section [2.7.3 – Viewing Folders Properties from Trash](#).

1. The **Global Index** tab displays the global indexes attached with the selected document if attached. Click **Close** to close the screen.

2.8 Options



1. Click **Options** icon from the OmniDocs **Web desktop/Master desktop**. The "Options" screen appears.

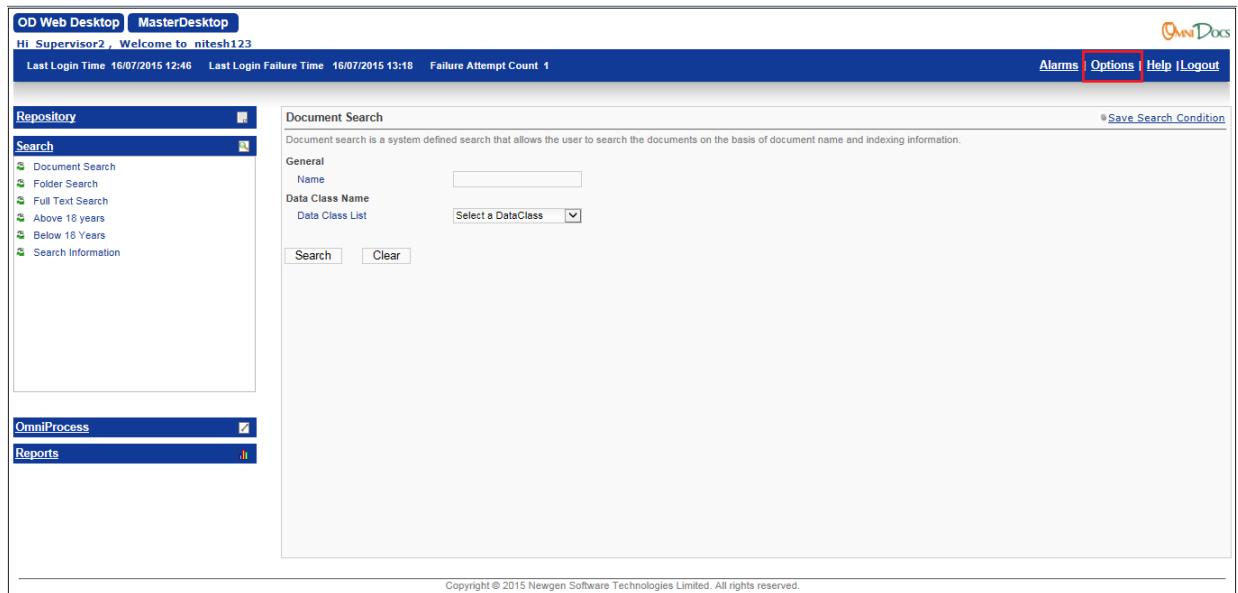


Figure: 2.258

Working with OmniDocs

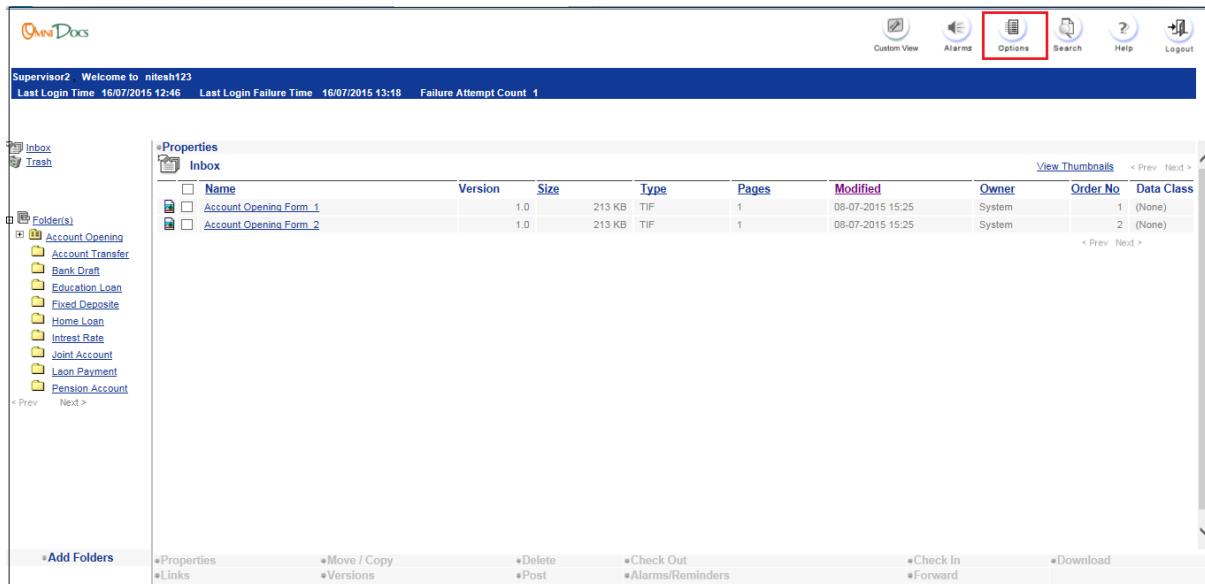


Figure: 2.259

2. The **Options** screen appears. By default **Personalize** tab appears selected.

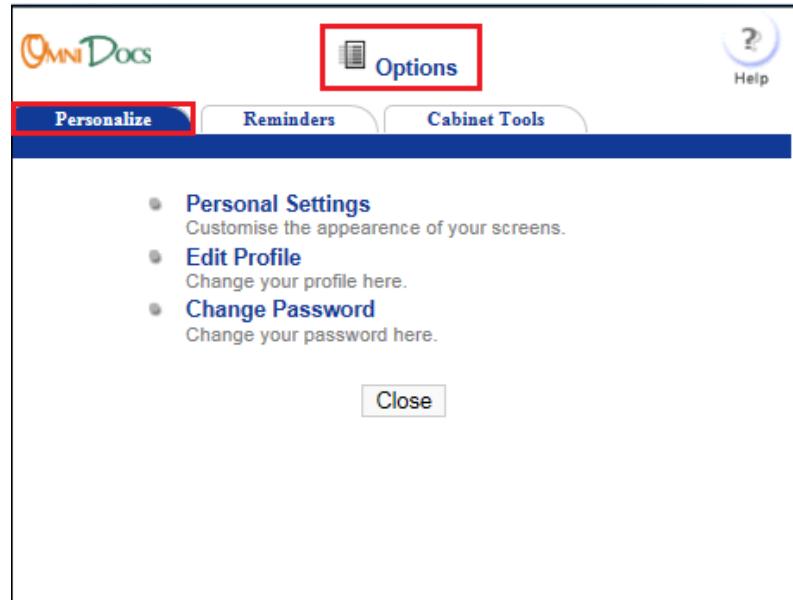


Figure: 2.260

2.8.1 Personalize

Personalize tab is provided in order to set **Personal Settings**, **Edit Profile**, and **Change Password**.

2.8.1.1 Personal Settings

1. Click **Personal Settings** option in the **Personalize** tab.

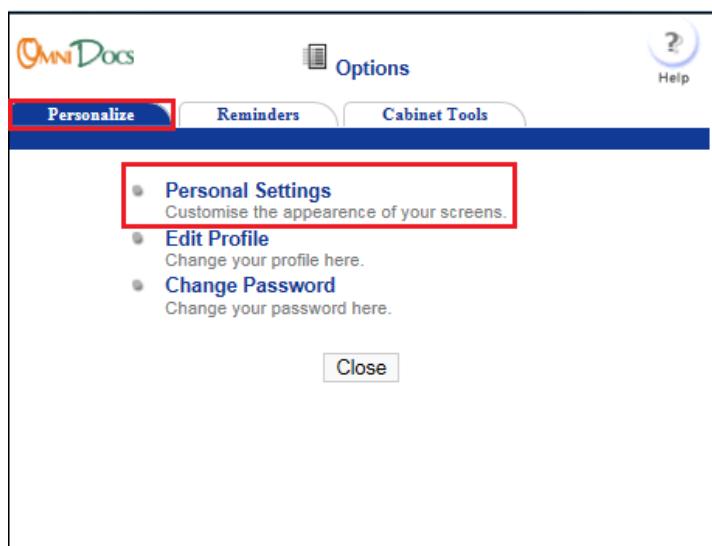


Figure: 2.261

2. The **Personal Settings** screen appears.
3. Select batch sizes that allow an optimum utilization of the display area of your desktop. The user can define batch size for **Folder List**, **Search Result List**, **Document List**, **User List**, and **Pick List**.

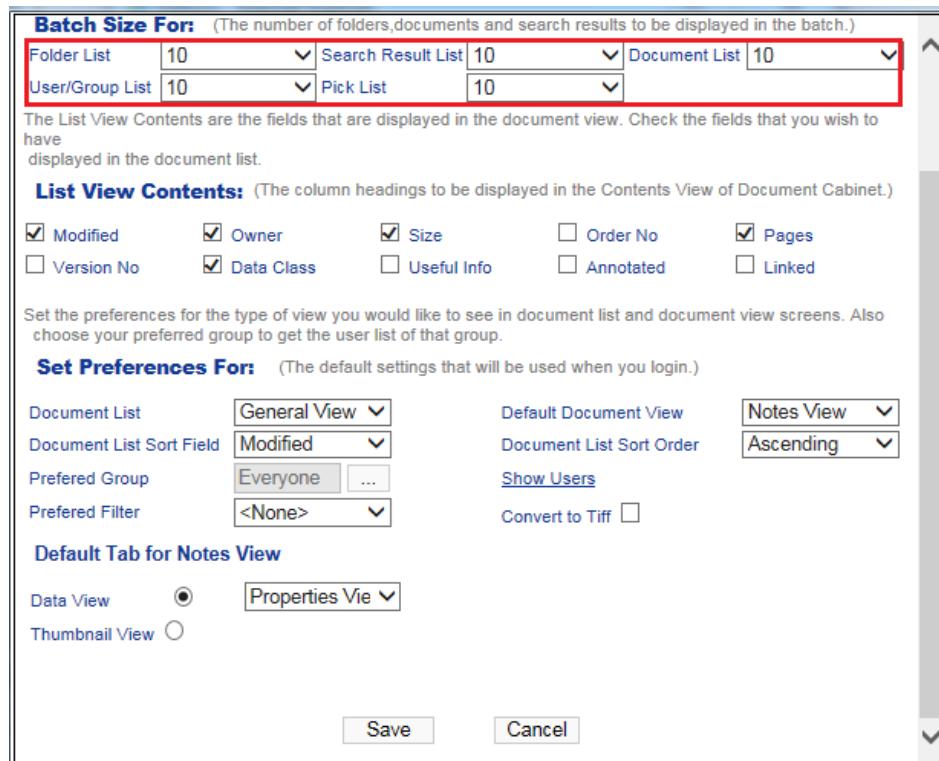


Figure: 2.262

4. Check-in the required check-boxes in the **List View Contents** that you want to view as default in the content view of document cabinet.
5. Set preference for "Document List", "Default View", "Document List Sort Field", "Document List Sort Order", "Preferred Group", "Preferred Filter" and "Convert to Tiff" options In the **Set Preferences For** tab.
6. Specify default tab for notes by including **Data View** option or **Thumbnail** option in the **Default Tab for Notes View**.
7. Click **Save** button to exit from Personal Settings dialog box with all personal settings defined, else click **Cancel**.

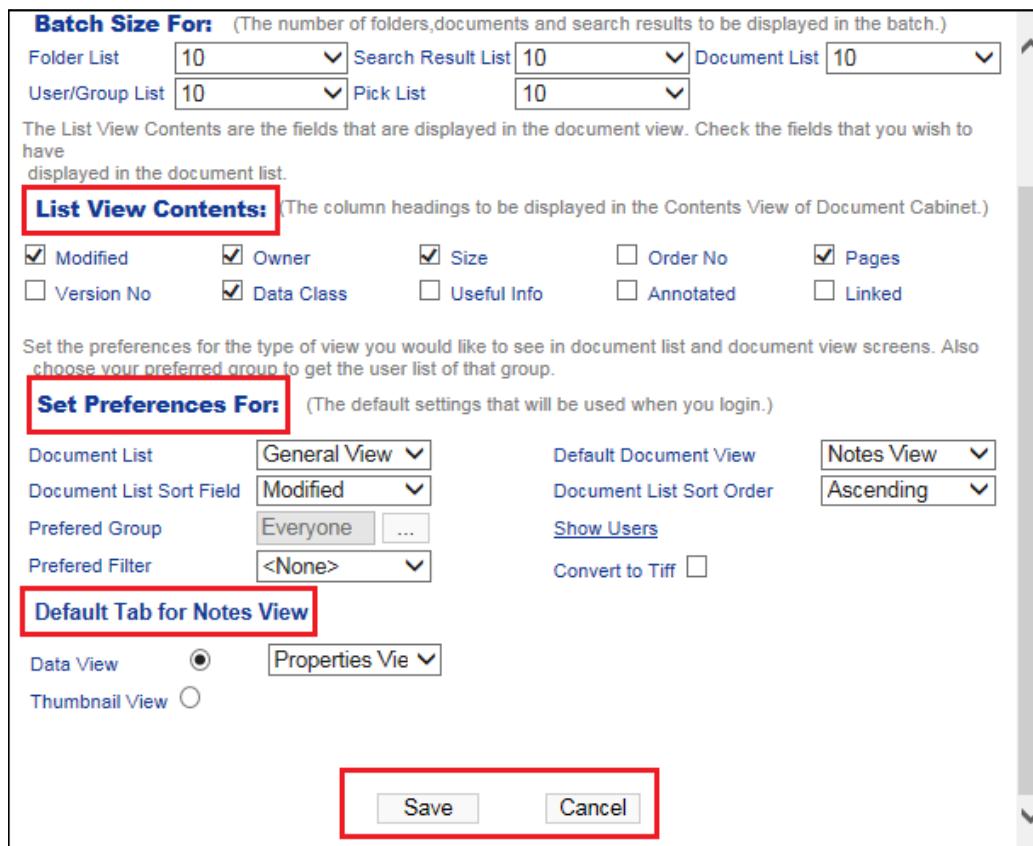


Figure: 2.263

2.8.1.2 Edit Profile

1. Click **Edit Profile** option.

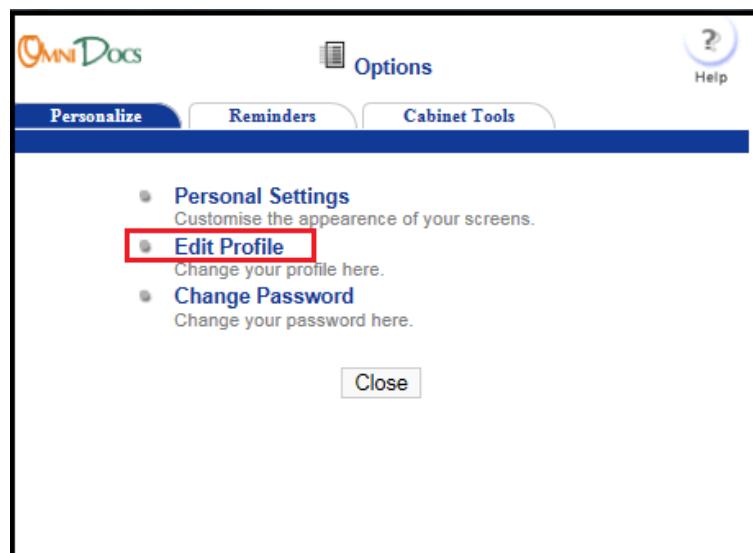


Figure: 2.264

2. The **Edit Profile** screen appears. The tab is used for editing personal
3. The **User ID** and **Cabinet Name** will appear by default in the dialog box.

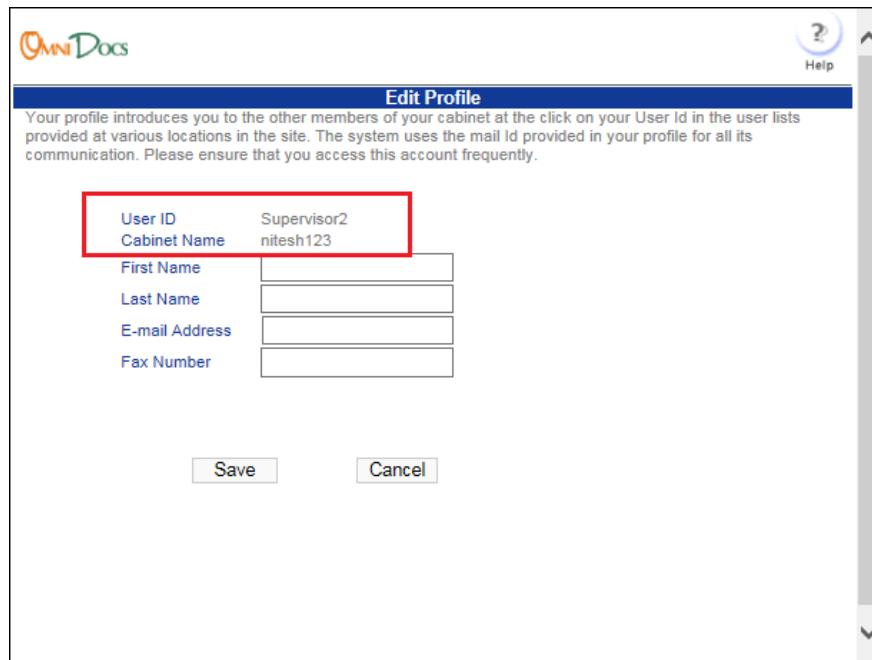


Figure: 2.265

4. Specify your **First Name**, **Last Name**, **E-mail Address**, and **Fax Number**.
5. Click the **Save** to save and exit from **Edit Profile** screen, else click **Cancel**.

Working with OmniDocs

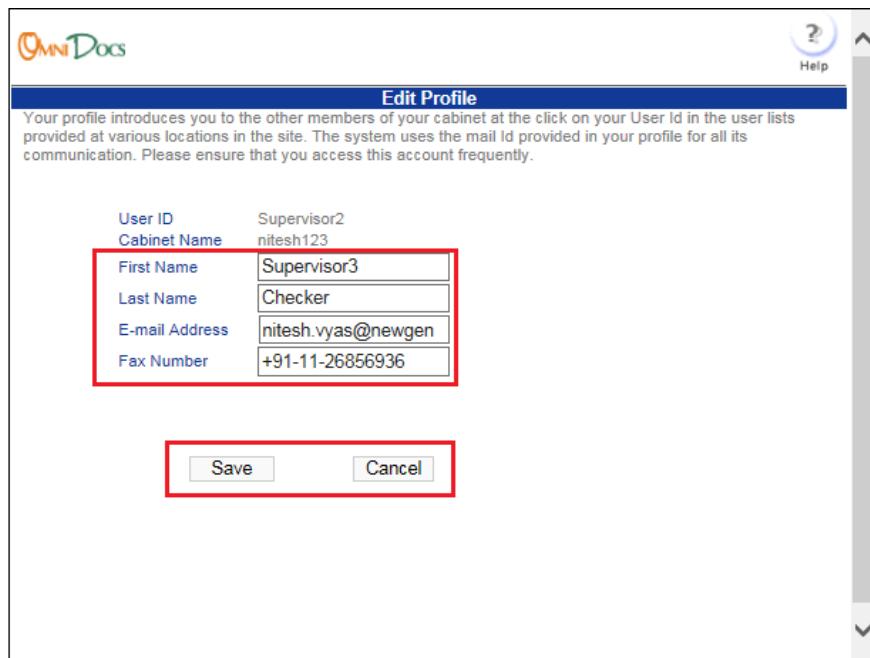


Figure: 2.266

2.8.1.3 Change Password

1. Click **Change Password** tab.

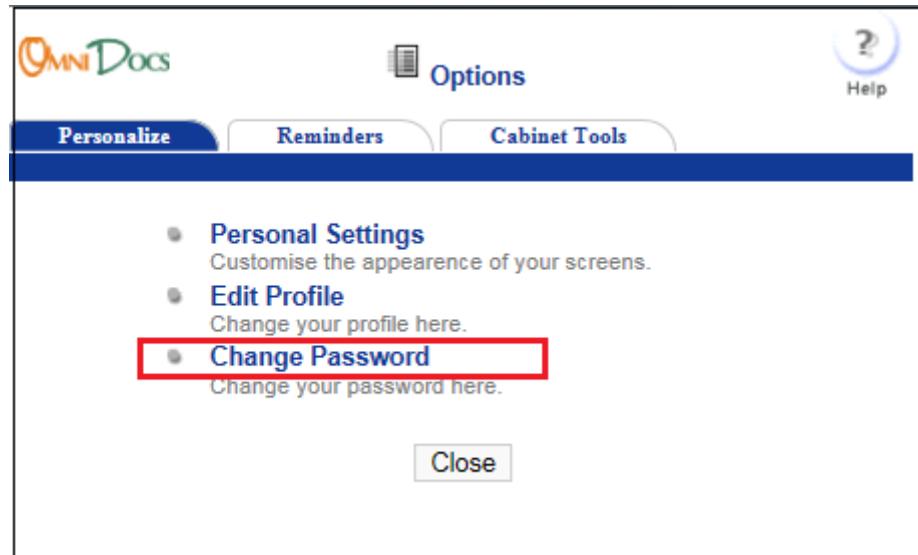


Figure: 2.267

2. The **Change Password** screen appears. The **logged in User** is displayed.
3. Specify the old password in **Old Password** textbox.

4. Specify the new password in **New Password** textbox and then confirm it in the **Confirm Password** textbox.
5. Click **Save** to save changes else click **Cancel**.

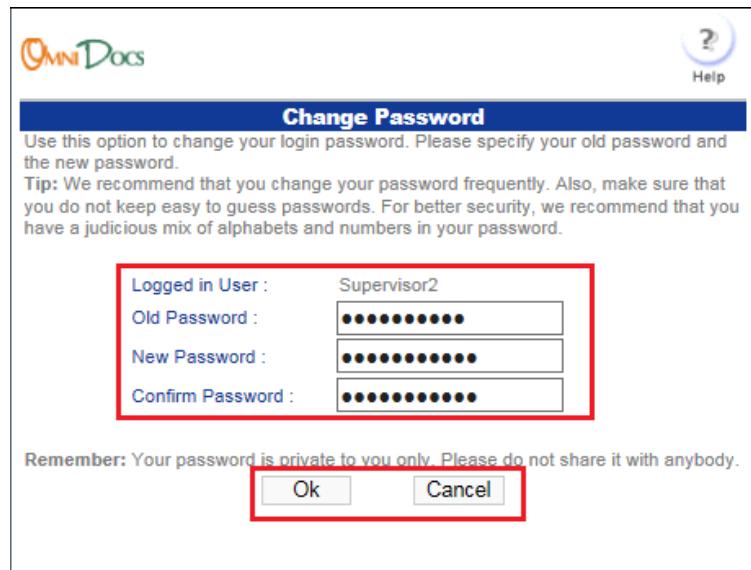


Figure: 2.268

6. Limitations can be set on the password:

- The maximum length of the password can be up to 32 characters.
 - The password entered is case sensitive.
 - Leading and trailing spaces are not allowed.
 - Special characters like: "\ / | + - & ^ % \$ # @,!“ are not allowed
7. If you attempt to log on your OmniDocs user account using a previous expired password, then the computer will show a message box that displays the message, **"Your password has expired. Please change your password."**

2.8.2 Reminders

Reminders tabs helps user to set reminders, configure notifications, configure document/folder alarms and configure document reminders.

2.8.2.1 Set Reminders:

1. Click the **Reminders** tab from the **Options** screen. The **Reminders** screen appears.
2. Click on **Set Reminders** Link.

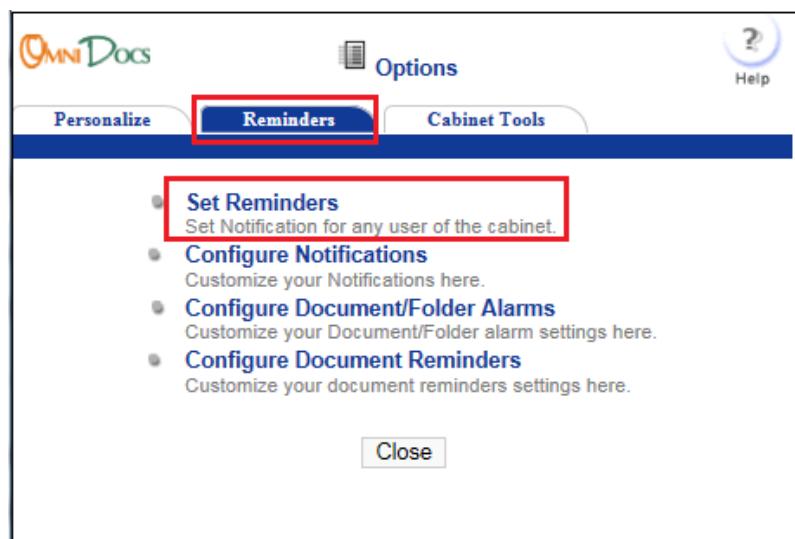


Figure: 2.269

3. Set **Reminders** screen appears.
4. Select the **Myself** option to send notification to the logged in user.

Working with OmniDocs

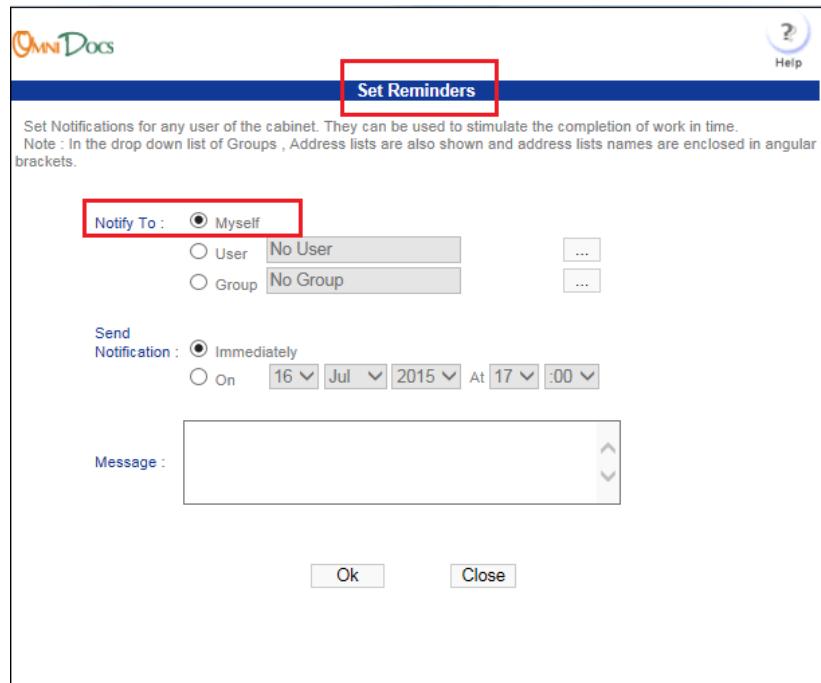


Figure: 2.270

5. Click the **User** selection button to send notification to the selected user.
6. Select the required user name to which the notification is to be sent, from **User** combo box.

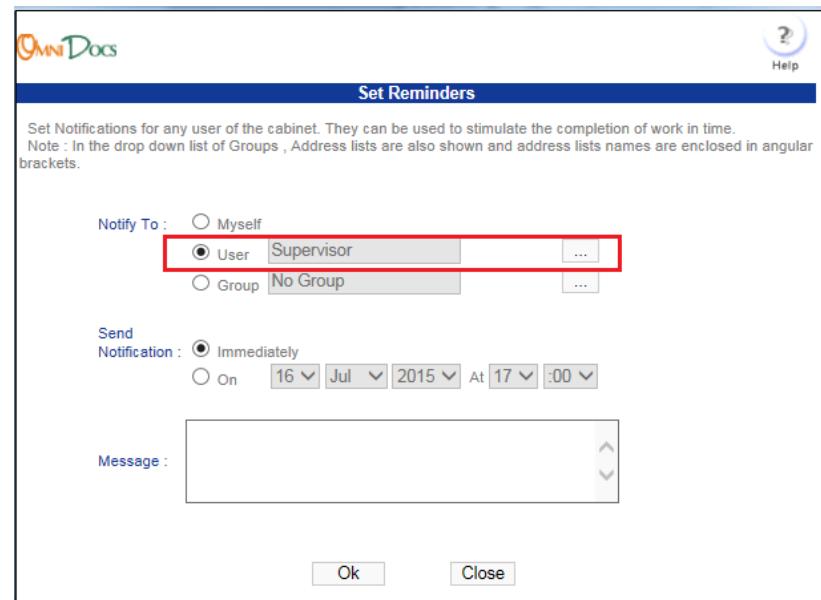


Figure: 2.271

Working with OmniDocs

7. Click the **Group** selection button to send notification to the selected group.
8. Select the required group name to which the notification has to be sent, from the **Group** combo box.

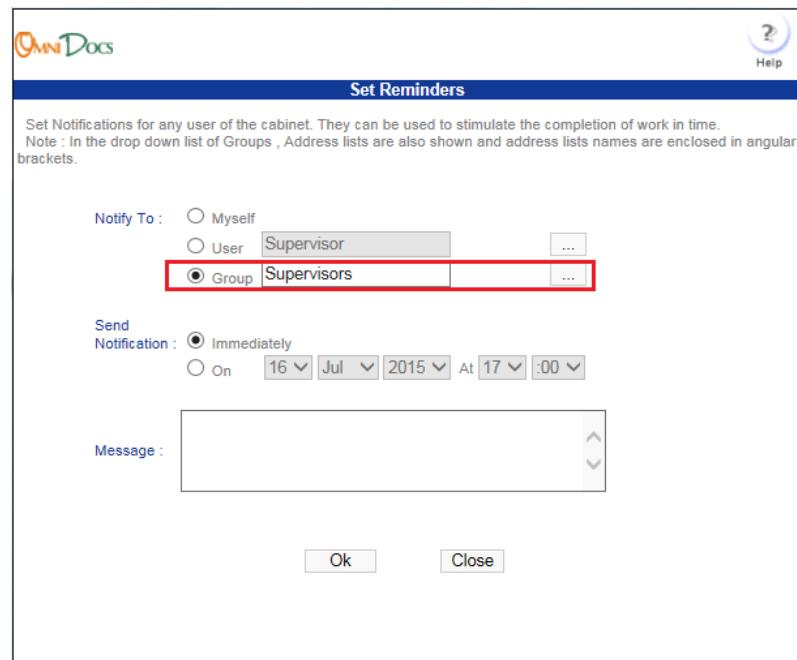


Figure: 2.272

9. Click the **Immediately** selection button to send the notification immediately.

Working with OmniDocs

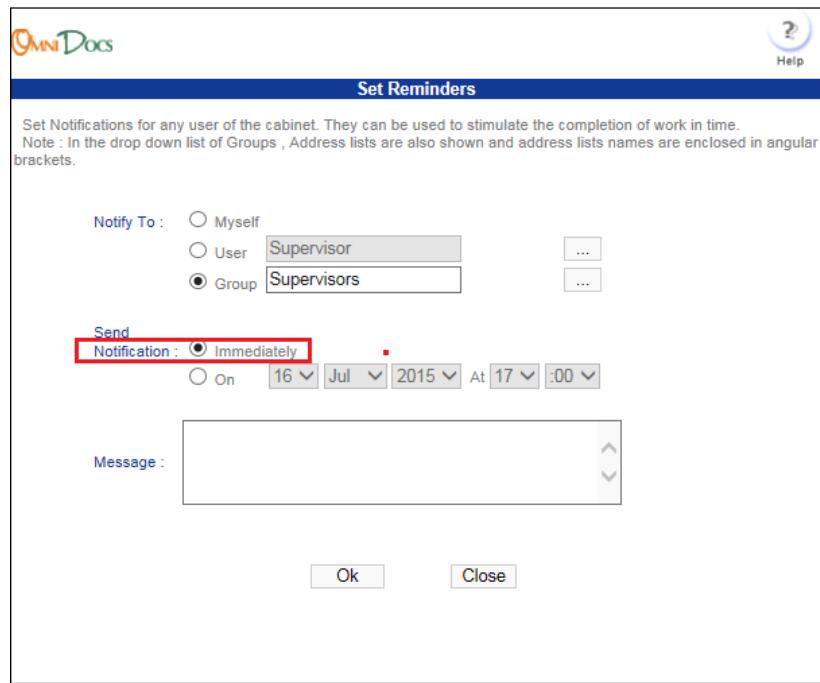


Figure: 2.273

10. To send the notification later on any specified date and time, click the **On** selection button.
11. Specify the required date and time as shown:

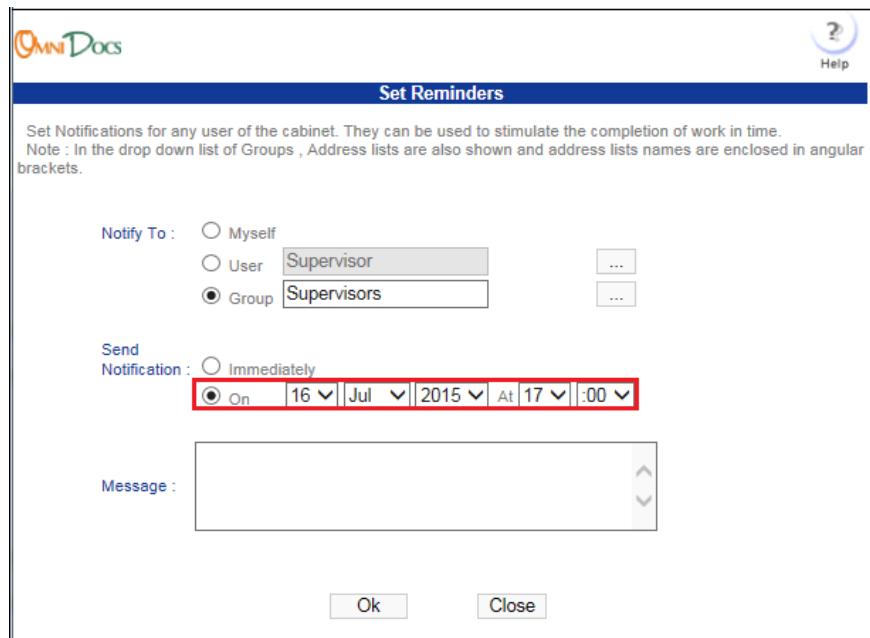


Figure: 2.274

NOTE:

The date should be in the format of the server, where OmniDocs Web is installed and the time should be in the format of (hh:mm:ss).

12. Specify the message in the Message area for the notification.

NOTE:

A maximum of 255 characters can be entered in the Message area.

13. Click the **OK** button for sending the notice else click **Close** button.

14. The **Reminder/Notification** is sent to the specified user.

2.8.2.2 Configure Notifications

1. Click the **Configure Notifications** link under **Reminders** tab in the **Options** screen.

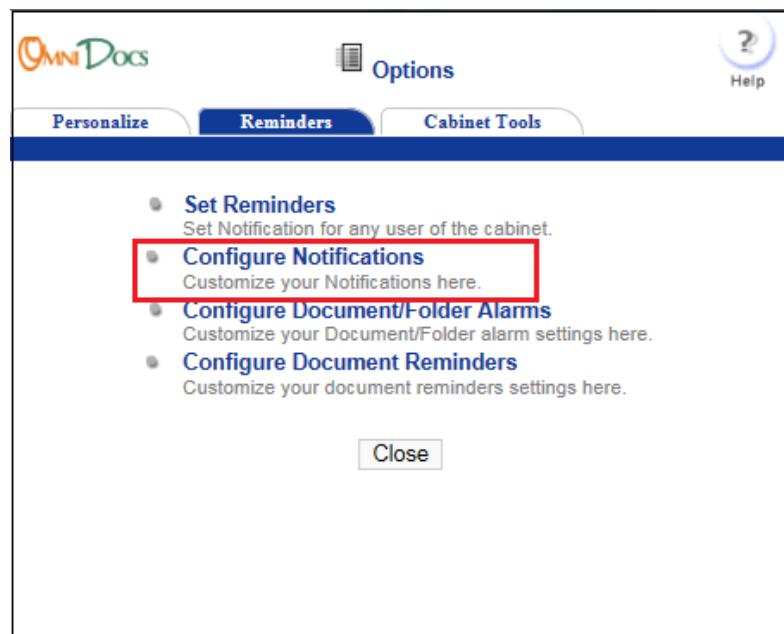


Figure: 2.275

2. The **Configure Notifications** screen appears. The Info, Date, Set By and Message are displayed.

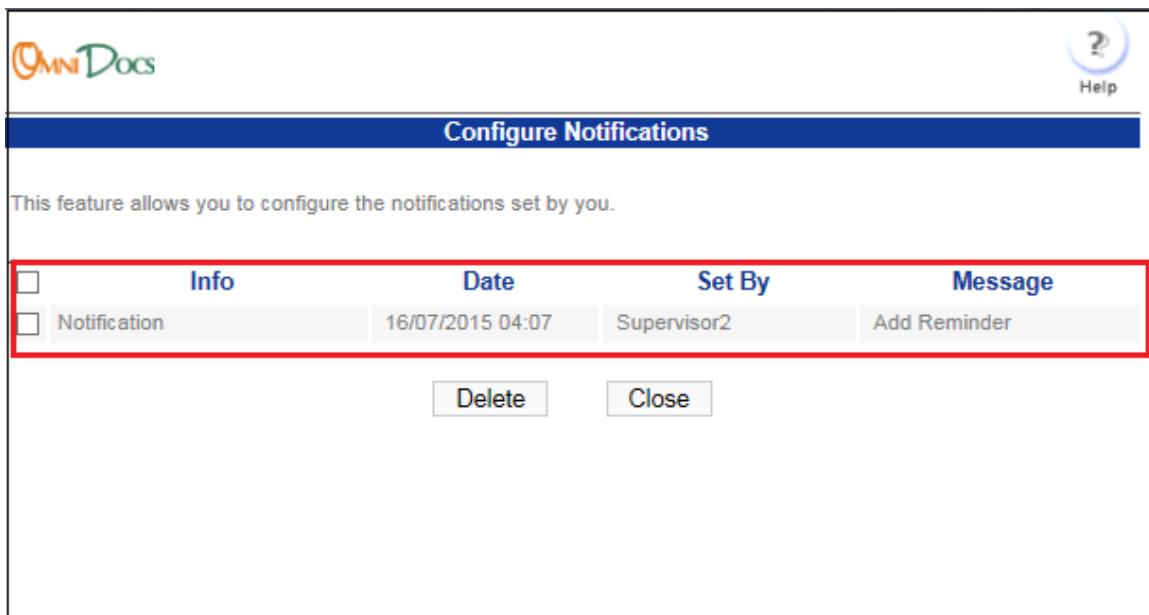


Figure: 2.276

3. To delete the specific reminder/notification, check them and click the **Delete** button.
4. Click **Close** command button to close the Configure Notifications screen.

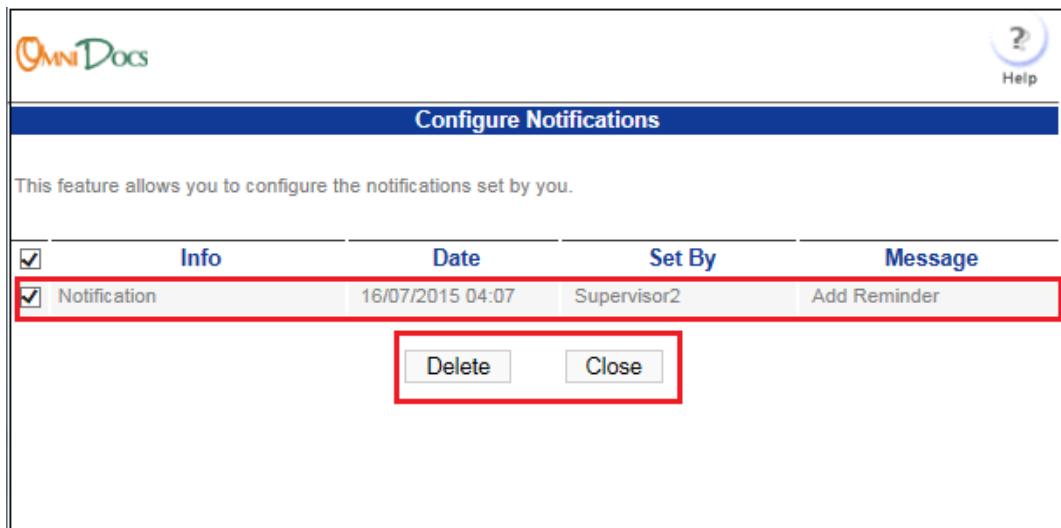


Figure: 2.277

2.8.2.3 Configure Document/Folder Alarms

1. Click the **Configure Document/Folder Alarms** link under **Reminders** tab in the **Options** screen.

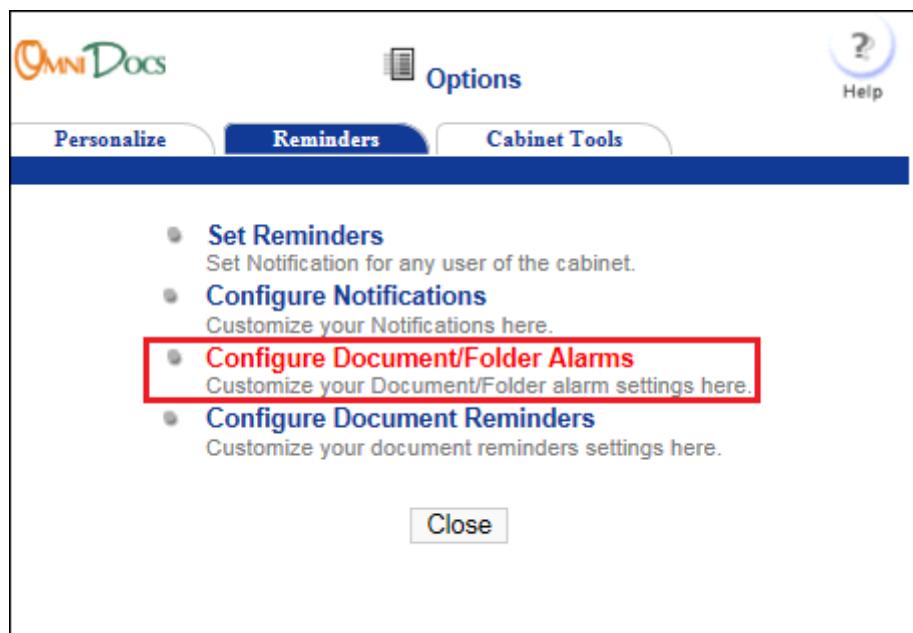


Figure: 2.278

2. The **View All Alarms** screen pop-ups. The Document Folder, Set for user, and Action field options are displayed.

Working with OmniDocs

<input type="checkbox"/>	Document/Folder	Set For User	Action
<input checked="" type="checkbox"/>	nitesh123	supervisor3	Document Deleted
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Uploaded

Figure: 2.279

3. To delete the alarms: select the specific alarm and click the **Delete** command button.
4. Click the **Cancel** button to close the **View All Alarms** screen.

<input type="checkbox"/>	Document/Folder	Set For User	Action
<input checked="" type="checkbox"/>	nitesh123	supervisor3	Document Deleted
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Moved
<input type="checkbox"/>	nitesh123	Supervisor2	Document Uploaded

Figure: 2.280

2.8.2.4 Configure Document Reminders

1. Click the **Configure Document/Folder Alarms** link under **Reminders** tab in the **Options** screen.

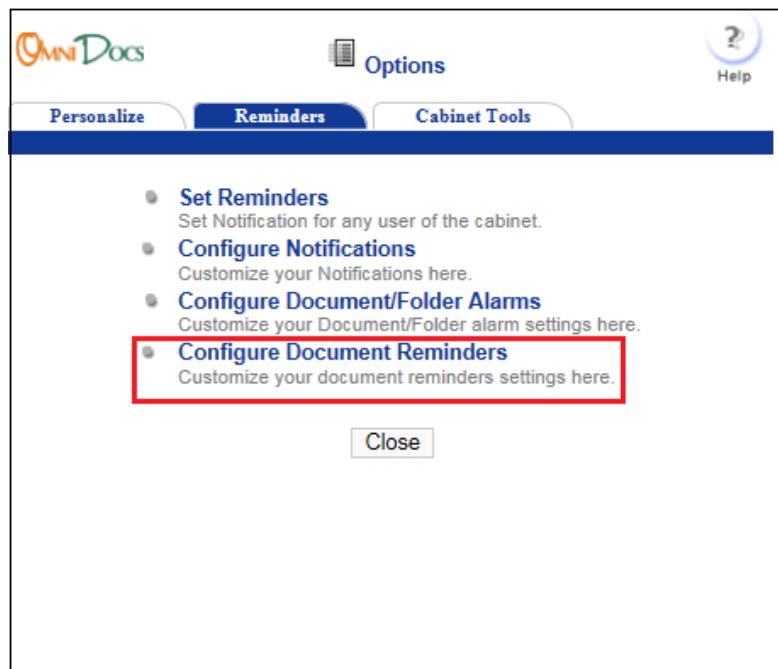


Figure: 2.281

2. The "Document Name", "Set for user", "Reminders", and "Comments" fields are displayed.

Working with OmniDocs

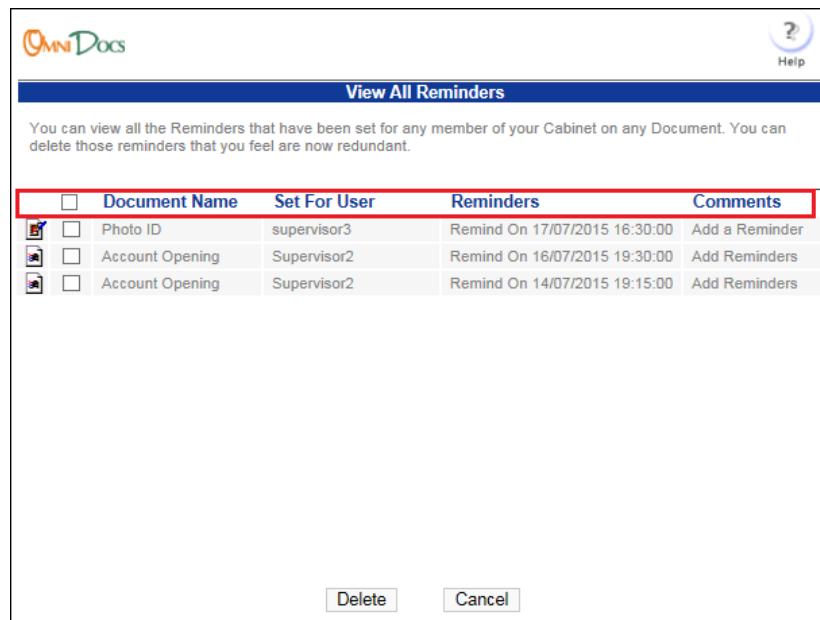


Figure: 2.282

3. To delete the reminders: check the specific reminder and click the **Delete** command button.
4. Click **Cancel** button to close the **View All Reminders** screen.

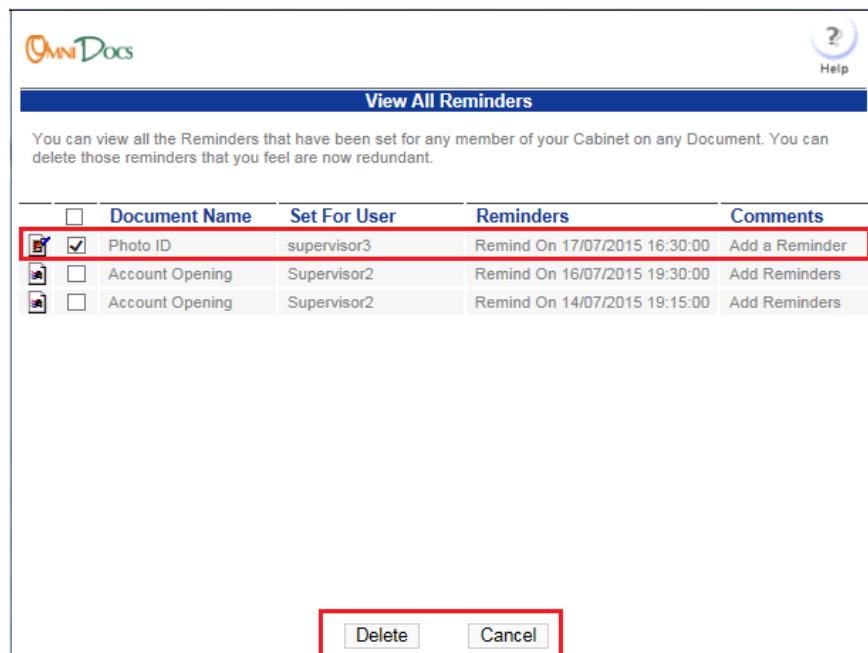


Figure: 2.283

2.8.3 Cabinet Tools

1. Click **Cabinet Tools** tab from the **Options** screen. The “Cabinet Tools” screen appears. Click the **User List** link.

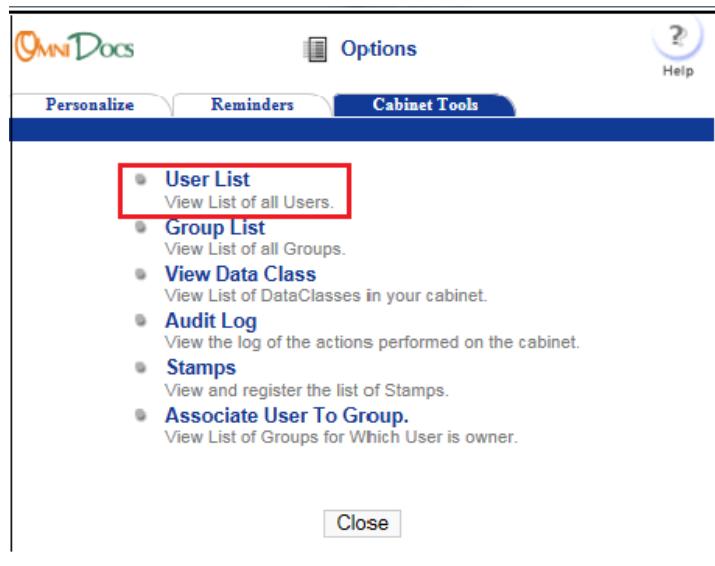


Figure: 2.284

2.8.3.1 User List

1. Click the **User List** option
2. The **User List** screen gets invoked. Select the users from **Show Users** of combo box.
3. The **User Name**, **User ID**, and **Email Address** fields are displayed.
4. Click **Close** button to close the User List screen.

Working with OmniDocs

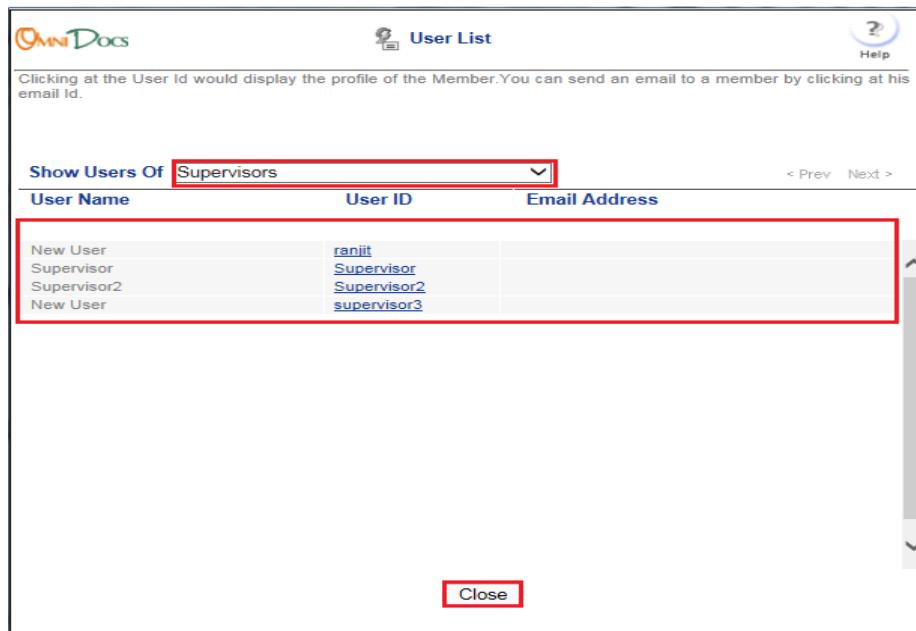


Figure: 2.285

2.8.3.2 Group List

1. Click **Group List** option under the **Cabinet Tools** tab in the **Options** screen.

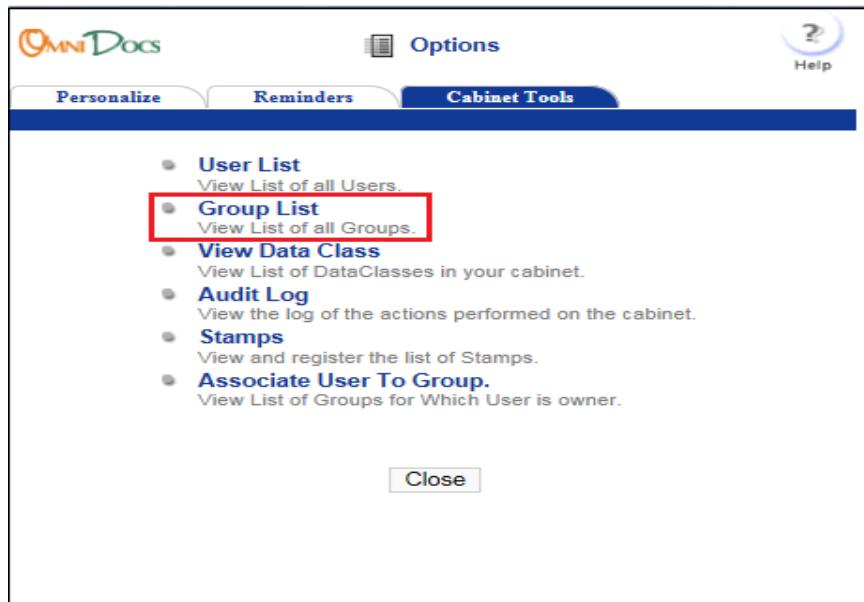


Figure: 2.286

2. The **Group List** Screen pops-up. The **List of All Groups** is displayed.
3. Click **Close** button to close the Group List screen.

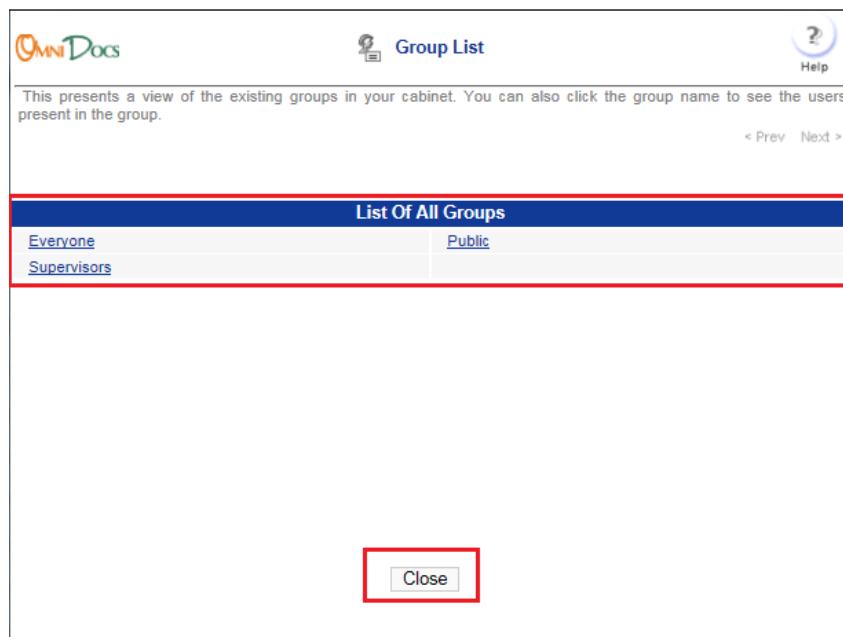


Figure: 2.287

2.8.3.3 View Data Class

1. Click **View Data Class** option under the **Cabinet Tools** tab in the **Options** screen.

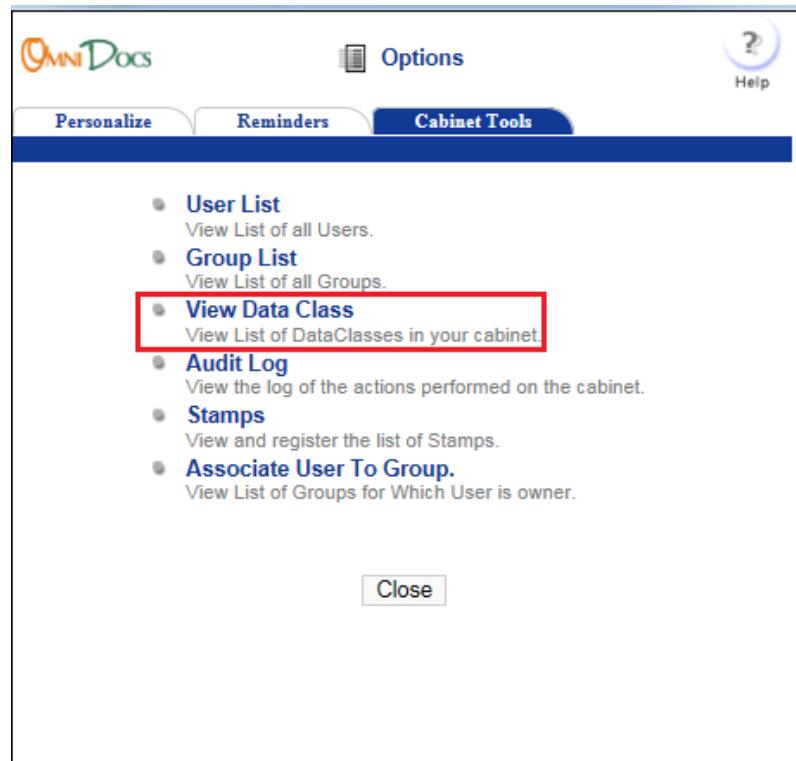


Figure: 2.288

2. The **View Data Class** screen gets invoked. Select data class from **Data Class Name** combo box.
3. The "Field Name", "Type", and "Constraint" fields are displayed.
4. Click **Close** button to close the **View Data Class** screen.

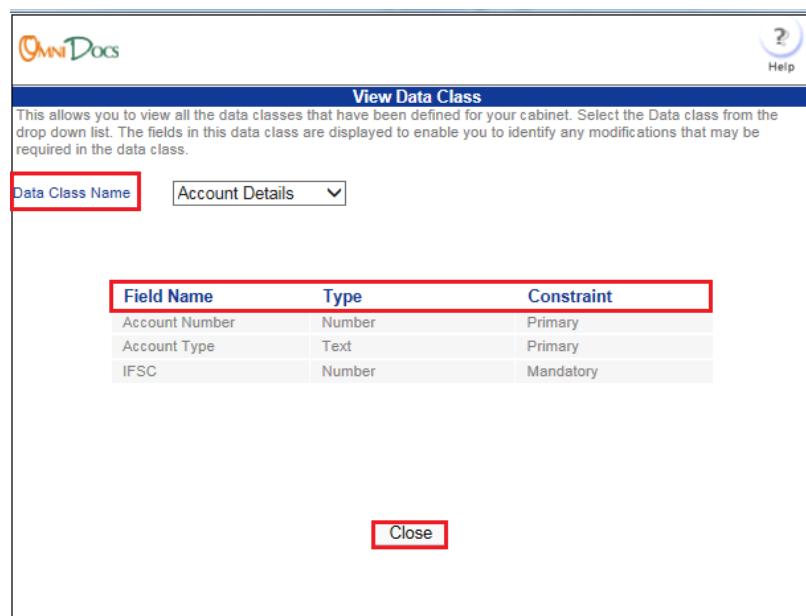


Figure: 2.289

2.8.3.4 Audit Log

1. Click **Audit Log** option under the **Cabinet Tools** tab in the **Options** screen.

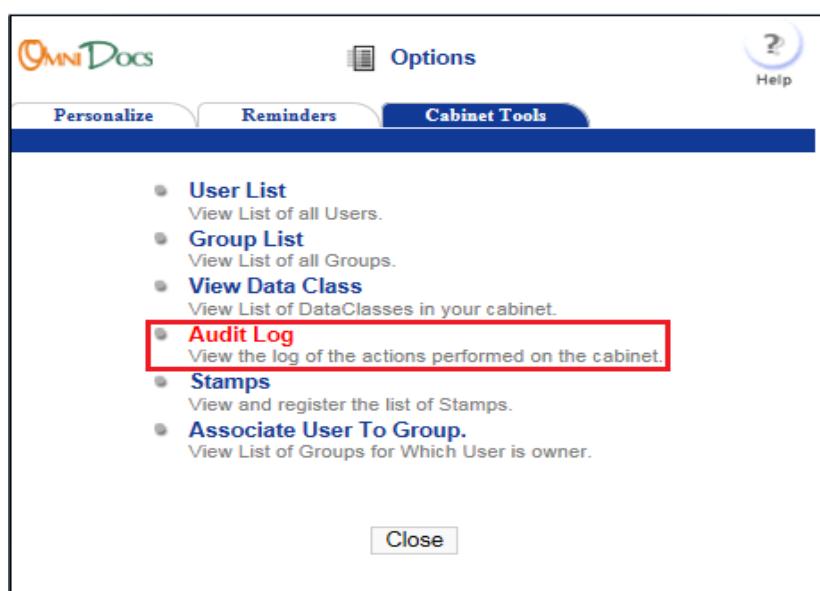


Figure: 2.290

2. The **Audit Log** screen gets invoked. The "Action", "Action Done By", "Date Time", and "Remarks" fields are displayed.
3. Click **Save AuditLog** to save audit log else click **Close** to close the **Audit Log** screen.

Action	Action Done By	Date Time	Remarks
Log in	Supervisor	30/06/2015 16:06	Success-Supervisor
Log out	Supervisor	30/06/2015 16:06	
Log in	Supervisor	30/06/2015 16:06	Success-Supervisor
DataClass created	Supervisor	30/06/2015 16:06	DataClass System_Con... ► Created
Log out	Supervisor	30/06/2015 16:06	
Log in	Supervisor	30/06/2015 16:07	Success-Supervisor 192.168.55.118 N
Cabinet properties modified	Supervisor	30/06/2015 16:07	
Cabinet properties modified	Supervisor	30/06/2015 16:07	
Log out	Supervisor	30/06/2015 16:08	
Log in	Supervisor	30/06/2015 16:08	Success-Supervisor 192.168.55.118 N
Log in	Supervisor	30/06/2015 16:10	Failure-Supervisor--192.168.55.118User is already logged in
Log out	Supervisor	30/06/2015 16:10	

Figure: 2.291

2.8.3.5 Stamps

A **stamp** is an image, which can be applied on the document. Only registered stamps are available for use. There is no limit to the number of stamps you can register. You can unregister stamps, which are not required further. To replace a registered stamp, unregister the existing stamp and register the new stamp.

To view stamps, follow the following steps:

1. Click **Stamps** option under the **Cabinet Tools** tab in the **Options** screen.

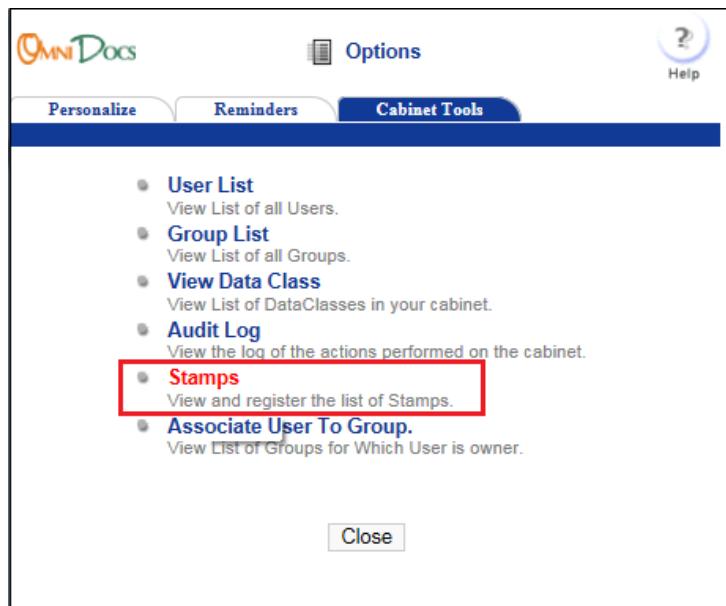


Figure: 2.292

2. The **Stamp Tools** screen get pops-up. Click on **Register Stamps** button to register a stamp.



Figure: 2.293

3. The following dialog box appears. Click the **Browse** button to attach at **Stamp File**, enter the **Stamp Title** and click **Save**, else click **Cancel**.

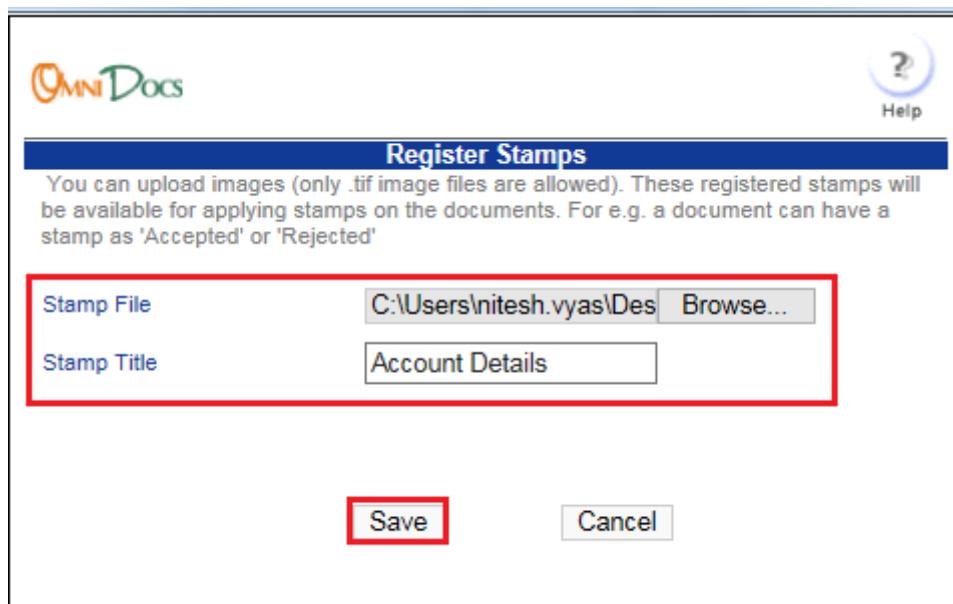


Figure: 2.294

2.8.3.6 Associate User To Group

1. Click **Associate User To Group** option under the **Cabinet Tools** tab in the **Options** screen.

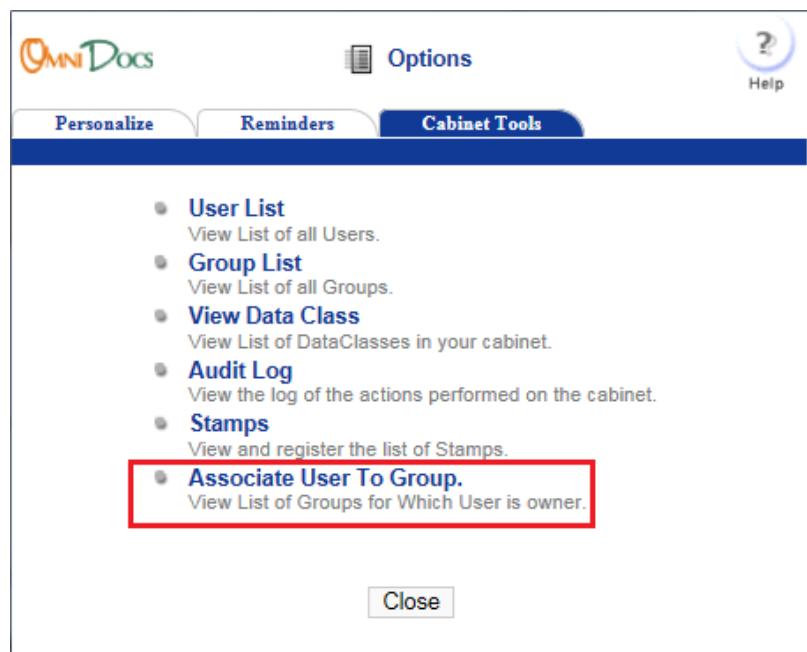


Figure: 2.295

2. The **Associate User To Group** screen gets pops-up. The screen displays process of associating and de-associating user to a group in web module.
 - a) The **Group List** displays only those group for which user is owner.

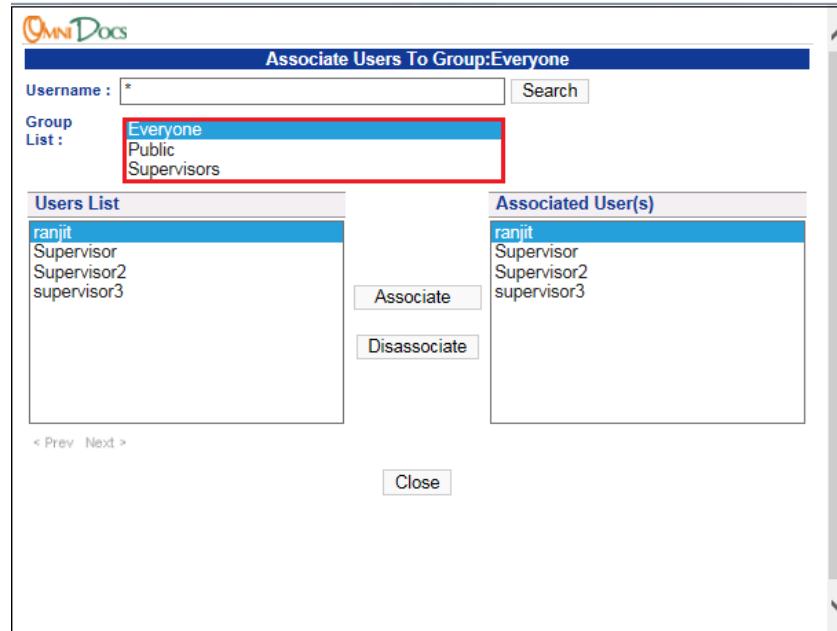


Figure: 2.296

- b) **User List** shows the list of all users available in system.
 - c) User can select any user to associate it with the group.
 - d) **Associated User** shows the list of users which are associated to the selected group.

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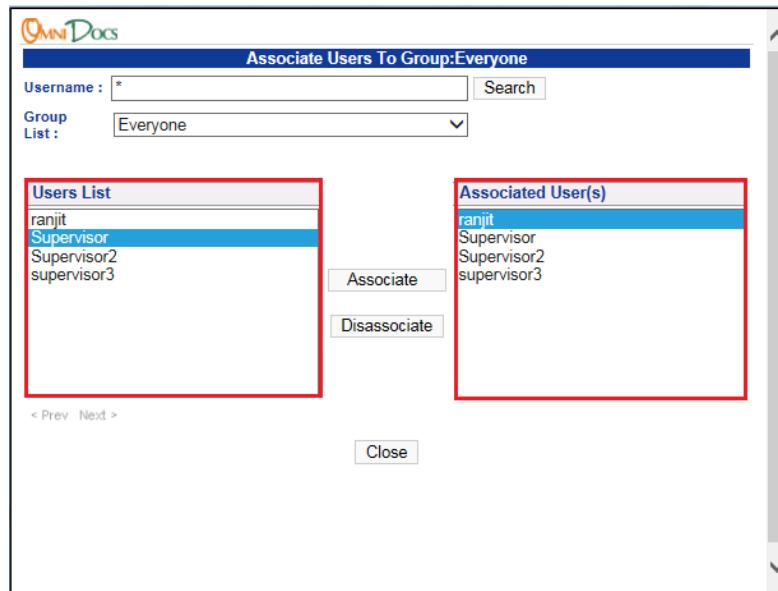


Figure: 2.297

- e) Click **Deassociate** to de-associate any associated user.

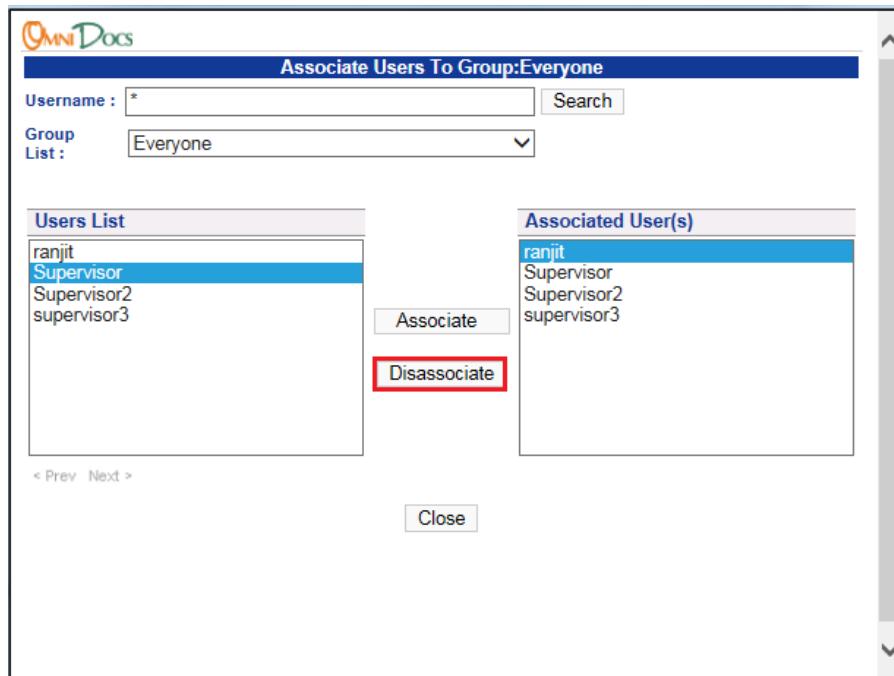


Figure: 2.298

3. Any user added to a specific group will inherit all the rights given to that group and rights for the group are managed by IT supervisor.

2.9 Assigning Copy Rights

This feature allows the user to explicitly allocate the rights to copy.

The right of Copy does not couple with Read rights. The user has to define the **Read** and **Copy** as separate rights at each level. If the user is given only "Read" right then the document can only be read and not copied in anyway. Therefore "Copy" rights are explicitly defined and allocated to the user.

Allocating Copy Rights:

1. Login the **OmniDocs Admin**.
2. Select **System Administration** from the **Admin Main Menu**.
3. Click on the **Rights** command button in the bottom of the screen.

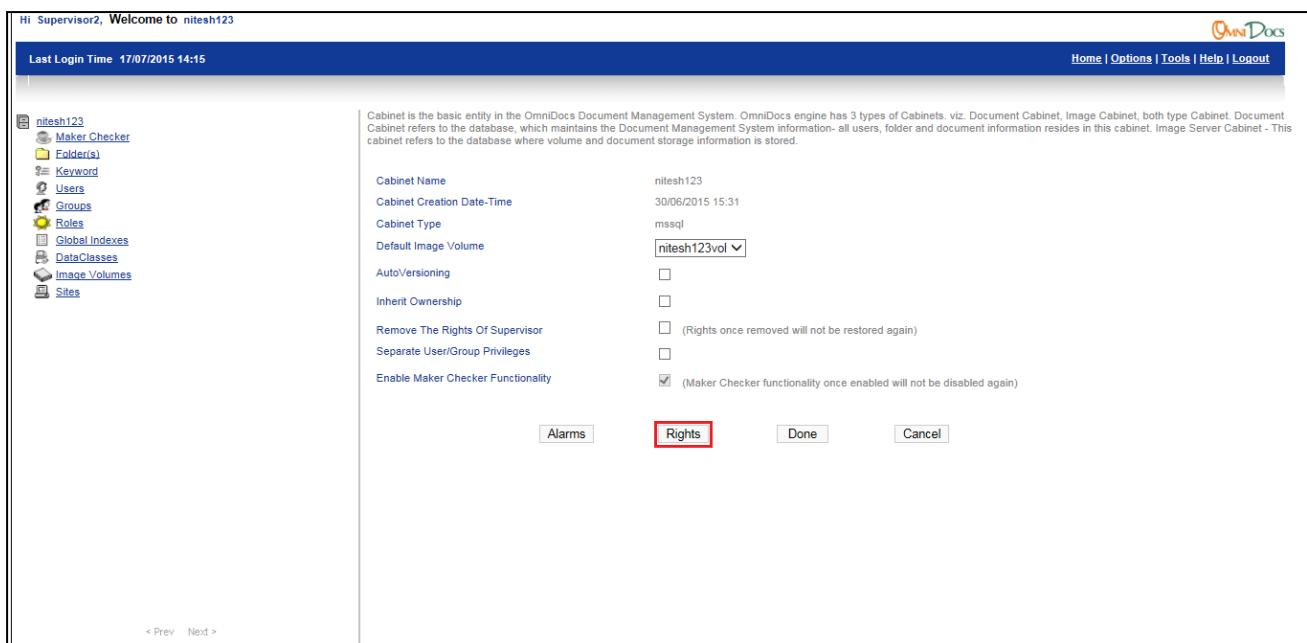


Figure: 2.299

4. The **Rights** command button invokes the following screen.
5. Click on **Advanced** command button.

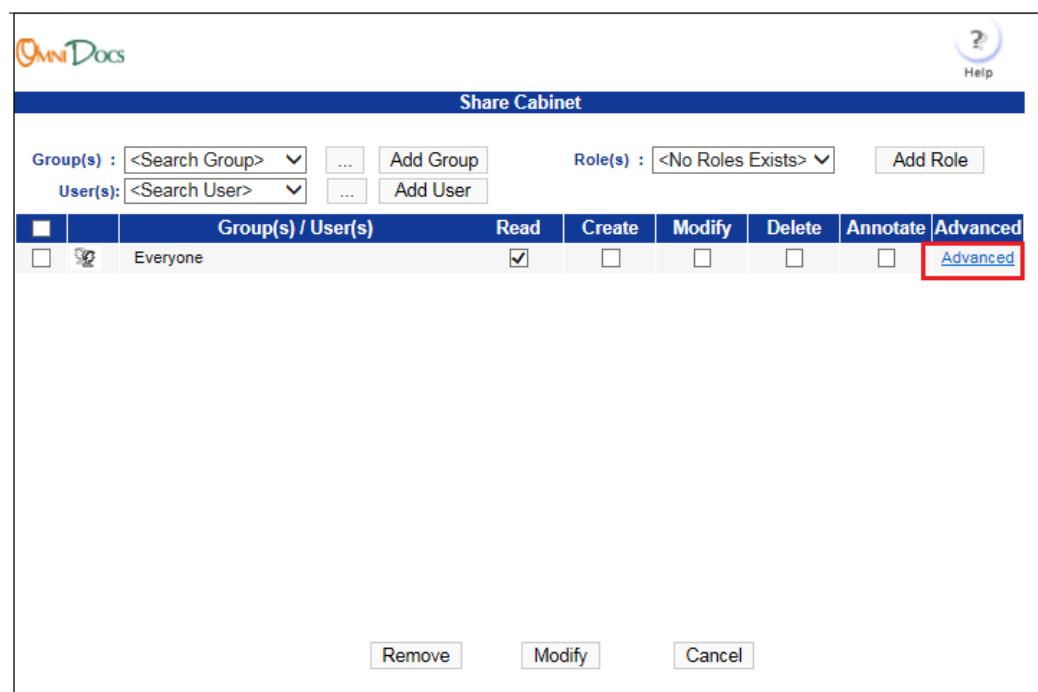


Figure: 2.300

6. The **Advanced** command button, pops-up the following screen.
7. Select the check-box for the rights and then click **Save** or **Close** button.

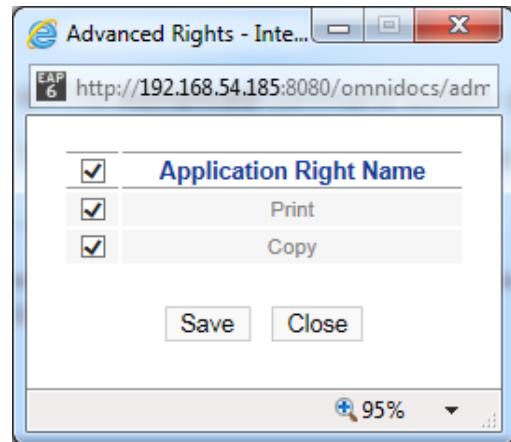


Figure: 2.301

2.10 Last Login

User can view the last login details. It displays the **Last login time**, **Last Login Failure Time**, and the **Failure Attempt Count**.

In Web Desktop:

A screenshot of the OmniDocs Web Desktop interface. The top navigation bar includes "OD Web Desktop" and "MasterDesktop", the user "Hi Supervisor2, Welcome to nitesh123", and links for "Alarms", "Options", "Help", and "Logout". On the left, there's a sidebar with "Repository" and "Search" sections containing links like "Document Search", "Folder Search", "Full Text Search", and "Above 18 years". The main content area has a "Document Search" form with fields for "Name" and "Data Class Name" (with a dropdown menu "Select a DataClass"). Below the search form is a red box highlighting the text "Last Login Time 17/07/2015 14:35 Last Login Failure Time 17/07/2015 15:38 Failure Attempt Count 3". The bottom of the page shows sections for "OmniProcess" and "Reports".

Figure: 2.302

OR

In Master Desktop:

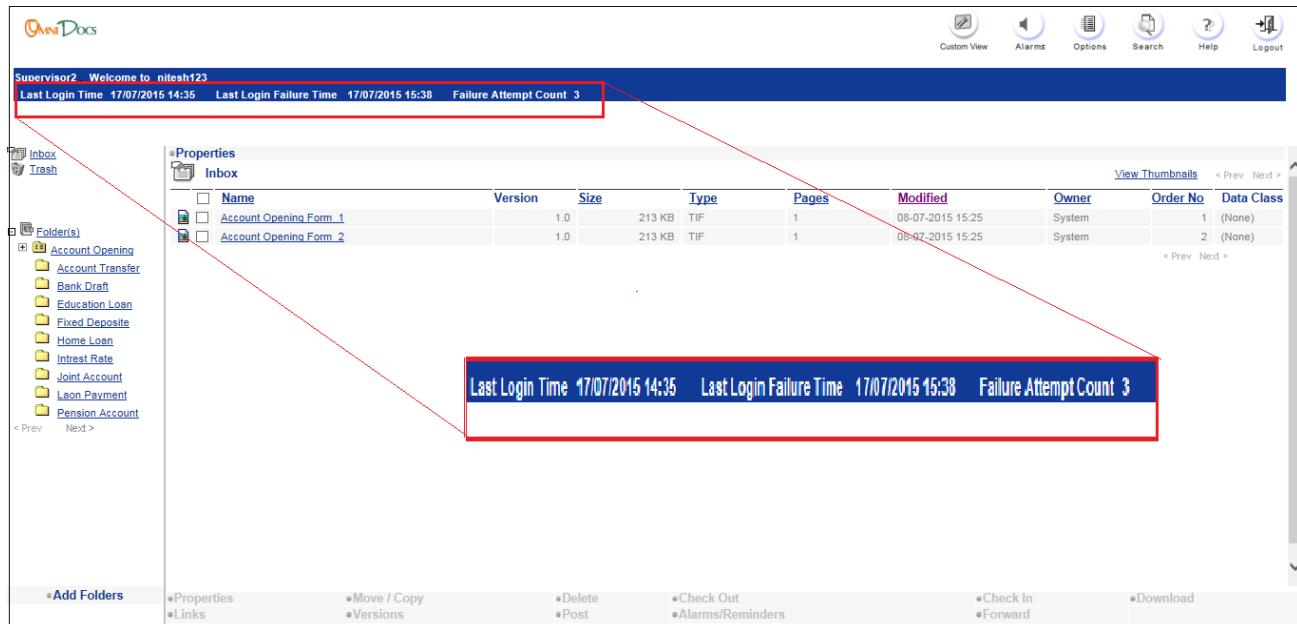


Figure: 2.303

2.11 Document Viewing

RMS 2.4 supports viewing documents in both Image Viewer Applet and OpAll Viewer.

You can configure your image viewing by setting the configuration parameter.

EnableDisableOpAllFlag: This parameter defines whether **OpAll Viewer** will be used or **IVApplet**.

Default Value is **N**.

In case, this parameter is set to **N**, the images will be viewed in the Applet Viewer. For viewing images in **IV Applet**, Refer **Chapter – 3**.

In case, this parameter is set to **Y**, the images will be viewed in the OpAll Viewer. For viewing images in **OpAll Viewer**, Refer **Chapter – 4**.

3 Document Viewing – OpAll Viewer

OpAll Viewer is a highly advanced, lightweight HTML5 viewer, which like a document viewer provides the functionality of viewing document images of various industry standard formats in different view modes. The HTML5 Viewer allows viewing and editing of plain as well as annotated images in file formats, viz. TIFF, BMP, GIF, JPEG and HTML documents. Transfer of image and annotation data between server and client takes place through the Hyper Text Transfer Protocol.

Image operations such as Print, Zoom, Rotate, Negate, Flip (Vertical/Horizontal) etc. can be effected directly on to the downloaded image through appropriate method calls. OpAll Viewer ensures superior image quality, flicker-free panning and dragging, independent of the viewing mode and state.

The user can view both image and non-image documents in the Newgen OmniDocs Web application. The document properties, notes, and annotations attached with the document are also displayed in this application.

In OmniDocs 9.1 Vector PDF support is provided. Now, the users can select and extract texts from those pdf documents that have text in them.

To view any document, follow the following trace:

1. Select the document from the OmniDocs Web Desktop.

NOTE:

The non-image documents are invoked in the browser, and image documents are invoked in the OpAll Viewer. In case OIVT is installed on the server machine, user is given an option to set his own preferences in order to view the document.

NOTE:

The annotations applied on the image document through the OmniDocs Desktop are also visible in the OmniDocs Web.

3.1 Image Document Operations

3.1.1 Viewing Image Documents

1. The Image documents include the .TIF files. Select a document type TIF.

The screenshot shows the OmniDocs OpAll Viewer interface. At the top, there are navigation links: 'OD Web Desktop', 'MasterDesktop', 'Hi Supervisor2, Welcome to seq_28apr', 'Last Login Time 04/05/2016 16:55', and the 'OmniDocs' logo. On the right side of the header are links for 'Alarms', 'Options', 'Help', and 'Logout'. Below the header, there's a search bar with dropdown menus for 'Media View' and 'Filter On: <None>'.

The main area is titled 'Repository' and shows a list of files under the folder 'spanish'. The table has columns: Name, Type, Owner, Size, Order No., Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. A red box highlights the first row, which contains 'Scantest_2' (Type: TIF, Owner: Supervisor, Size: 7.09 MB, Order No: 1, Pages: 8, Version: 1.0, Modified Date: 28/04/2016 13:12, Data Class: None). Other rows in the table include various image files like 'ssfa', 'sfs', and 'saurav' in different formats (TIF, JPG) and sizes.

At the bottom of the interface, there are links for 'Search', 'OmniProcess', and 'Reports'. The footer contains the copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 3.1

2. The selected document gets invoked in the **OpAll viewer**.

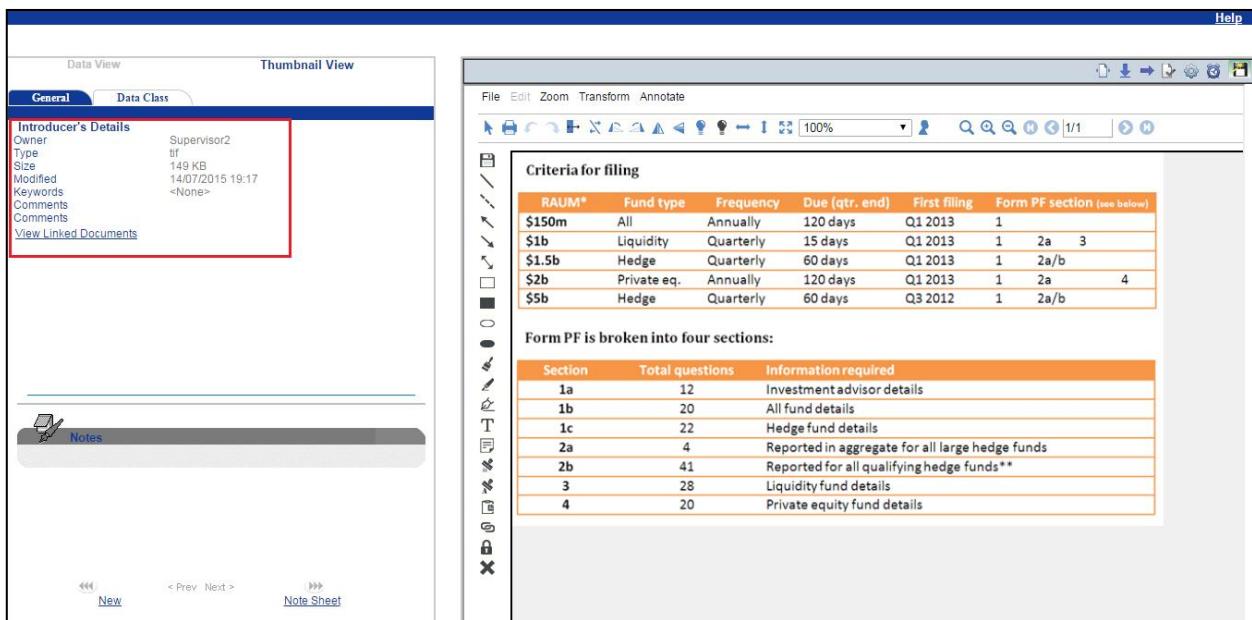


Figure: 3.2

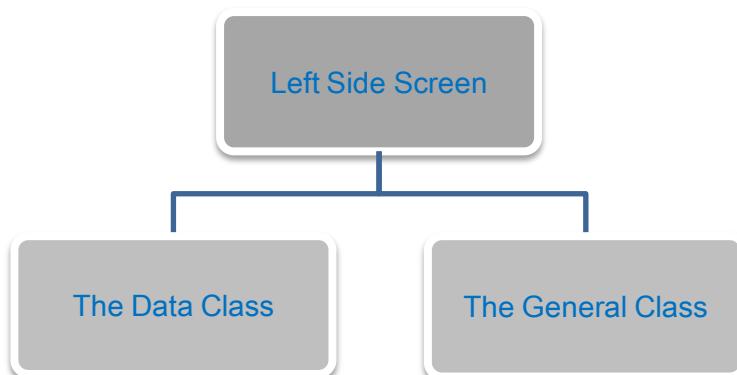
NOTE:

PRINT SCREEN DISABLED Security Feature

- Print Screen disabling feature is configurable by admin user.
- In order to prevent unauthorized access to the documents, OmniDocs 9.1 is enabled with an advanced **Print Screen** disabling feature. This means, "Print screen" will be disabled till the time any document is opened from OmniDocs application.

The screen is divided into two parts;

- The left side of the screen consists of two links.



Document Viewing – OpAll Viewer

The General: The General displays the General Properties of the selected document such as the name of the document, the type, number of pages, the size, modification date, the owner of the document, and keywords associated with the document.

The screenshot shows the OpAll Viewer application window. On the left, the 'General' tab is selected under 'Data View'. A red box highlights the 'Introducer's Details (1) (1)' section, which lists the following information:

Owner	Supervisor
Type	tif
Size	149 KB
Modified	21/07/2015 16:56
Keywords	<None>
Comments	
Comments	
View Linked Documents	

Below this section is a 'Notes' bar with a pencil icon and the word 'Notes'.

On the right, the 'Criteria for filing' section is displayed in a table:

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

Below the table, a note states: 'Form PF is broken into four sections:' followed by another table:

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

Figure: 3.3

The Data Class: The Data Class displays the Data Class associated with the particular document along with their field values.

The screenshot shows the OpAll Viewer application interface. On the left, there is a 'Data View' section with tabs for 'General' and 'Data Class'. The 'Data Class' tab is selected, displaying a table of account beneficiary information. A red box highlights the 'Account Beneficiary' section, which includes fields: Name (abhishek), Age (31), DOB (07-09-1984), and Address (19 pivot street, london). Below this table is a 'Notes' section with a note icon and a 'Notes' button. At the bottom of this panel are navigation buttons: '<<< New', '< Prev / Next >', and '>>> Note Sheet'. The URL '192.168.54.185:8080/omnidocs/webaccess/configurations/docview/Data View' is visible at the very bottom. On the right, there is a 'Criteria for filing' section with a table showing filing requirements by RAUM category. Below this is another table detailing the four sections of Form PF with their respective total questions and required information. The interface has a standard Windows-style toolbar at the top with various icons for file operations like Open, Save, Print, and Help.

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

Figure: 3.4

Document Viewing – OpAll Viewer

- The top of the screen consists of the **OpAll toolbar**.

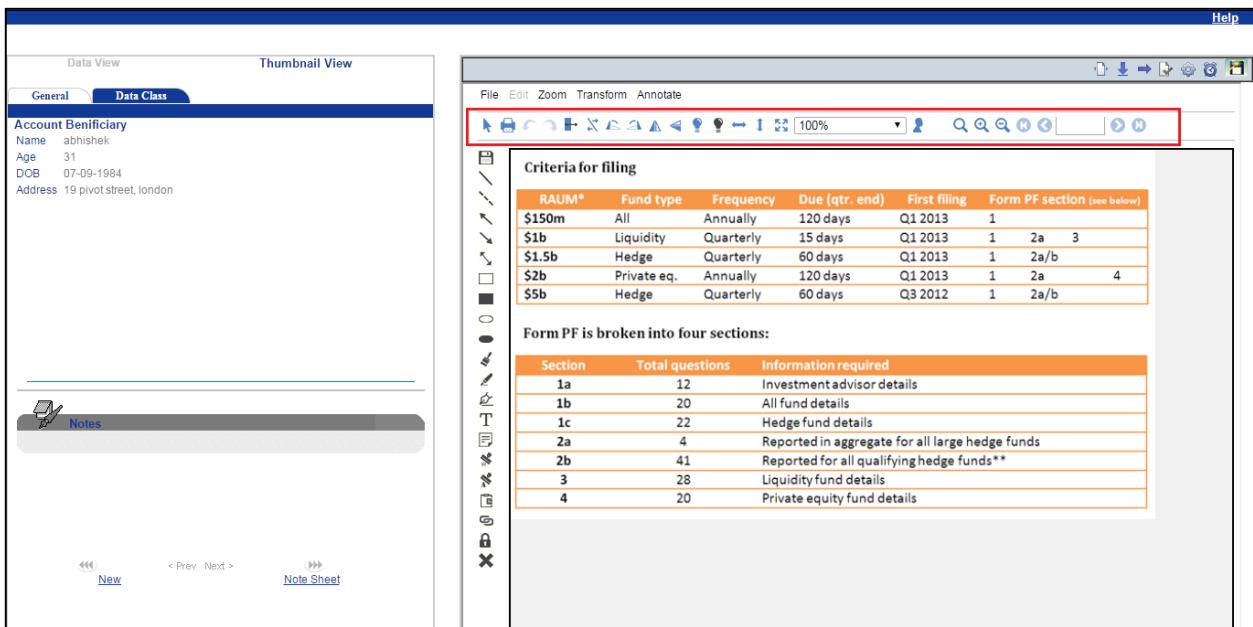


Figure: 3.5

- The right hand side of the screen consists of the **Annotation toolbar**.

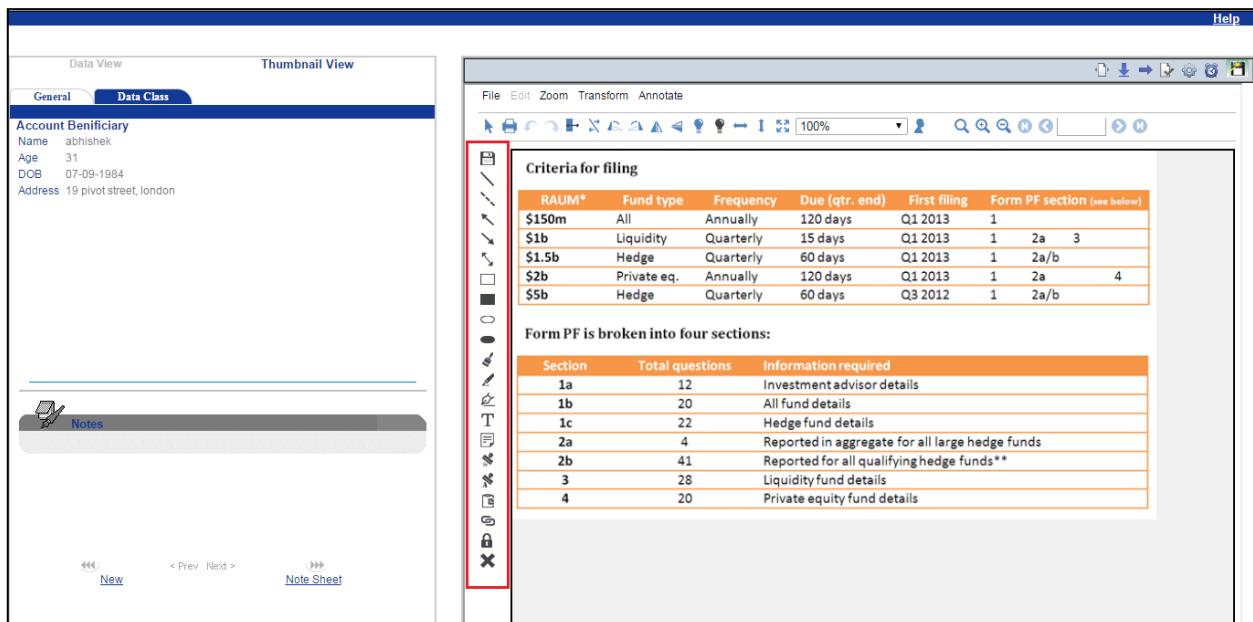


Figure: 3.6

OpAll Toolbar

The various types of OpAll toolbars are as follows:

-  **Enable Dragging** button disables the drawing annotation toolbars, and helps in moving annotations anywhere on the opened document. Enable Dragging is a toggle toolbar which changes to  button (Enable annotation Drawing).
-  **Prints** the displayed annotation. When this icon is clicked, a Print dialog box gets invoked.

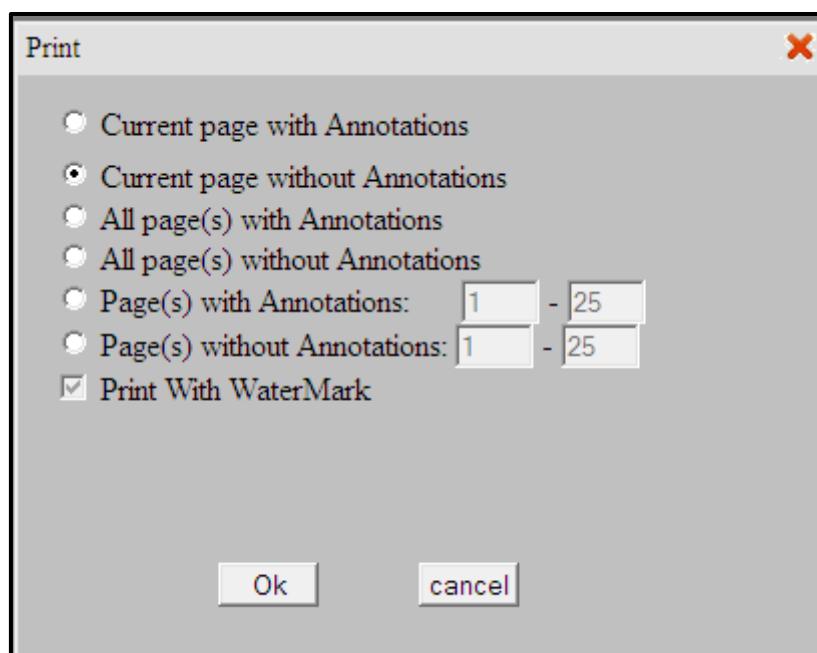


Figure: 3.7

Select from the options:

1. Select the required option from the list. Click **OK** button to print the Current Page with the selected option. Click **Cancel** button to close the Print dialog box without printing.

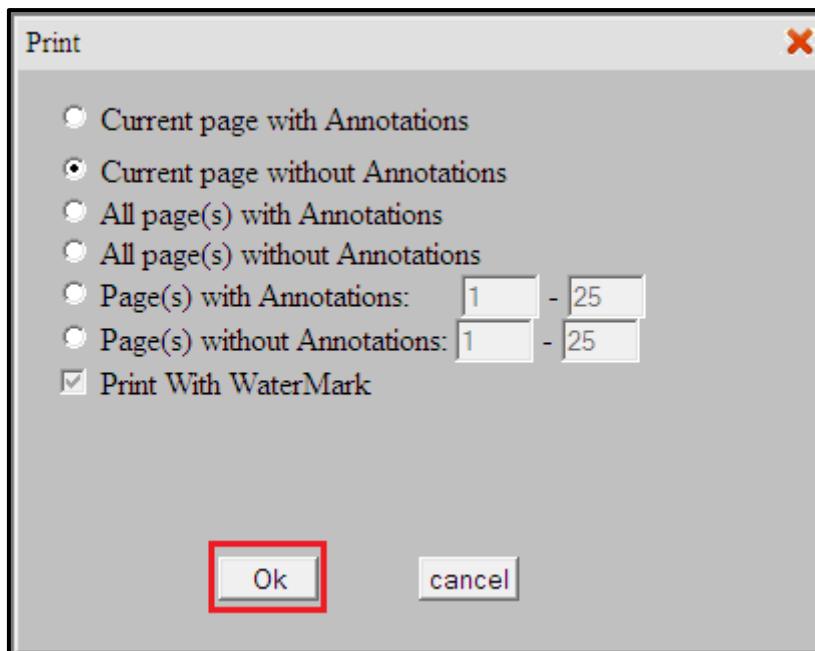


Figure: 3.8



Annotations With Username button displays the name of the person who has applied the annotation, time and date in the document when the annotation is applied by the user. Click the **Annotations With Username button**, to display the name of the person who has applied the annotation, time and date in the document when the annotation is applied by the user.

NOTE:

You can notice the user name who has applied the annotation, date and time of annotation applied on the left-hand side in the top of the document page.

The screenshot shows the OpAll Viewer application interface. On the left, there's a sidebar with 'Data View' and 'Thumbnail View' tabs, and a 'General' tab selected. It displays 'Introducer's Details' including Owner (Supervisor2), Type (I), Size (149 KB), Modified (14/07/2015 19:17), and Keywords (None). Below this is a 'View Linked Documents' link. At the bottom of the sidebar is a 'Notes' section with a pencil icon. Navigation buttons like '<<< New', '< Prev / Next >', and '>>> Note Sheet' are at the very bottom.

The main area has a toolbar with various icons for file operations like Open, Save, Print, and Search. A status bar at the top right shows 'Help', 'File', 'Edit', 'Zoom', 'Transform', 'Annotate', and a zoom level of '100%'. Below the toolbar is a menu bar with 'File', 'Edit', 'Zoom', 'Transform', 'Annotate', and a user icon.

A large central window contains two tables. The first table, titled 'Criteria for filing', lists RAUM categories and their filing requirements:

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

The second table, titled 'Form PF is broken into four sections:', lists the four sections and their details:

SECTION	TOTAL QUESTIONS	INFORMATION REQUIRED
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

Figure: 3.9



Zoom Lens button displays any selected area of the document in an enlarged view:

1. Click the **Zoom** Lens button; a Zoom Lens window is invoked.
2. Click anywhere in the document which needs to be viewed.
3. The area clicked is reflected in the Zoom Window with 100 % zoom.
4. To close the Zoom Window: Click the button.

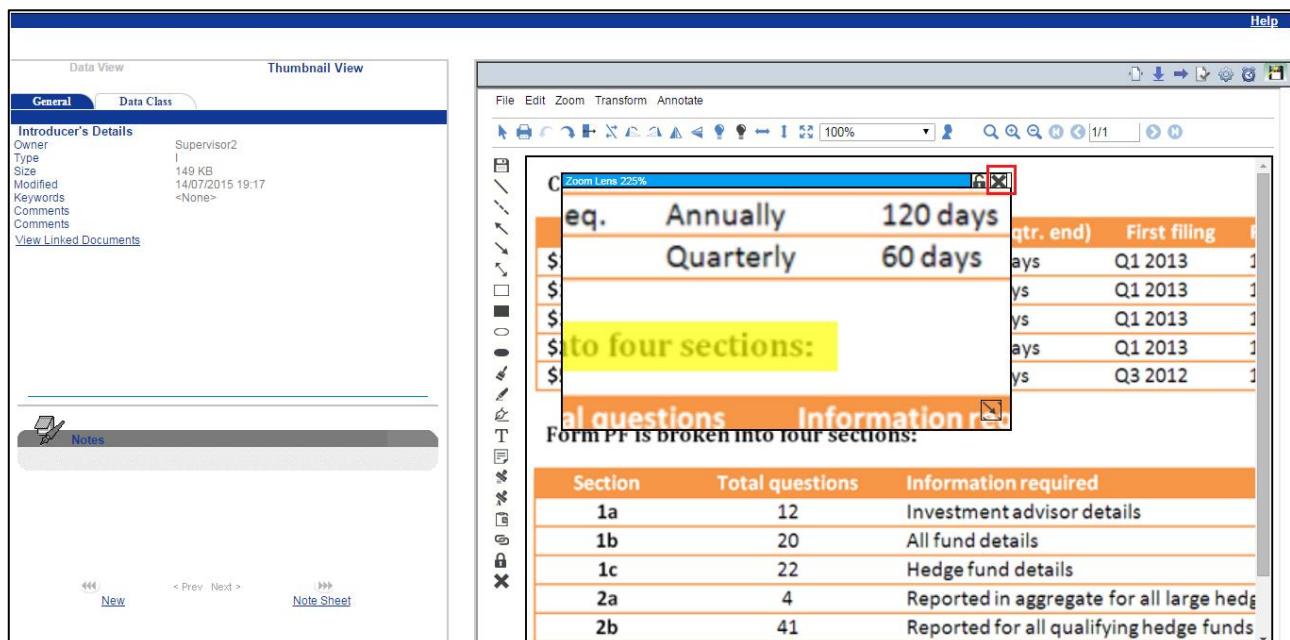


Figure: 3.10



Zoom In displays the whole document in a comparatively larger size.

1. Click the **Zoom In** button.
2. The document is displayed in a larger size.
3. To increase the size of the document keep on clicking the **Zoom In** button till the required size is achieved.

The screenshot shows the OpAll Viewer interface with the following details:

- Left Panel (Data View):**
 - General:** Owner: Supervisor2; Type: I; Size: 149 KB; Modified: 14/07/2015 19:17; Keywords: <None>.
 - Notes:** A section labeled "Notes" with a "New" button.
 - Bottom Buttons:** < Prev, Next >, Note Sheet.
- Right Panel (Thumbnail View):**
 - Toolbar:** File, Edit, Zoom, Transform, Annotate, etc.
 - Search Bar:** Contains a magnifying glass icon with a red box around it.
 - Criteria for filing:**

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b
 - Form PF sections:**

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

Figure: 3.11



Zoom Out button displays the document in a smaller size.

1. Click the **Zoom Out** button.
2. The document is displayed in a smaller size than that achieved by zooming in.
3. To reduce the size of the document keep on clicking the Zoom Out button till the required size is achieved.

The screenshot shows the OpAll Viewer application window. On the left, there's a sidebar with tabs for 'Data View' and 'Thumbnail View'. Below these are sections for 'General' and 'Data Class'. Under 'General', it lists 'Introducer's Details' including Owner (Supervisor2), Type (I), Size (149 KB), Modified (14/07/2015 19:17), and Keywords (<None>). There are also 'Comments' and 'View Linked Documents' sections. At the bottom of this sidebar is a 'Notes' section with a pencil icon and a 'New' link. Navigation links at the bottom include '< Prev', 'Next >', and 'Note Sheet'.

The main content area has a toolbar with various icons for file operations like Open, Save, Print, and a magnifying glass for search. The status bar shows '100%' and '1/1'. A red box highlights the magnifying glass icon in the toolbar.

The central part of the window contains two tables. The first table is titled 'Criteria for filing' and lists filing requirements based on RAUM*:

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

The second table is titled 'Form PF is broken into four sections:' and lists the sections and their details:

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

Figure: 3.12



Select button is used to select the text in the pdf document(Vector PDF feature).

1. Click the **Select** button.
2. Right click and then drag and drop the arrow on the to-be copied text.
3. Click on **Copy** button to copy the text.

The screenshot shows the OpAll Viewer interface with a PDF document open. On the left, there's a 'Data View' panel showing file details like 'Owner: romario', 'Type: pdf', 'Size: 26312 KB', 'Modified: 09/05/2017 16:25', 'Keywords: <None>', and 'Comments: not defined'. Below it is a 'Notes' section with a 'New' button and navigation links '< Prev' and 'Next >'. On the right, the main window displays a PDF page with text and figures. A red box highlights the 'Select' button in the toolbar at the top. Another red box highlights a context menu that appears when text is selected, containing options like 'Cut', 'Copy', 'Paste', 'Delete', 'Add Bookmark', 'Properties', 'Save', and 'Draw Zone Partition'. The PDF content includes a figure titled 'Figure 1.21' with two parts, and a block of text about cross-validation.

Figure: 3.13

Fit to Width button displays the document in the size of the OpAll.

1. Click the **Fit to Width** button.
2. The width of the document is increased to fit the OpAll area.

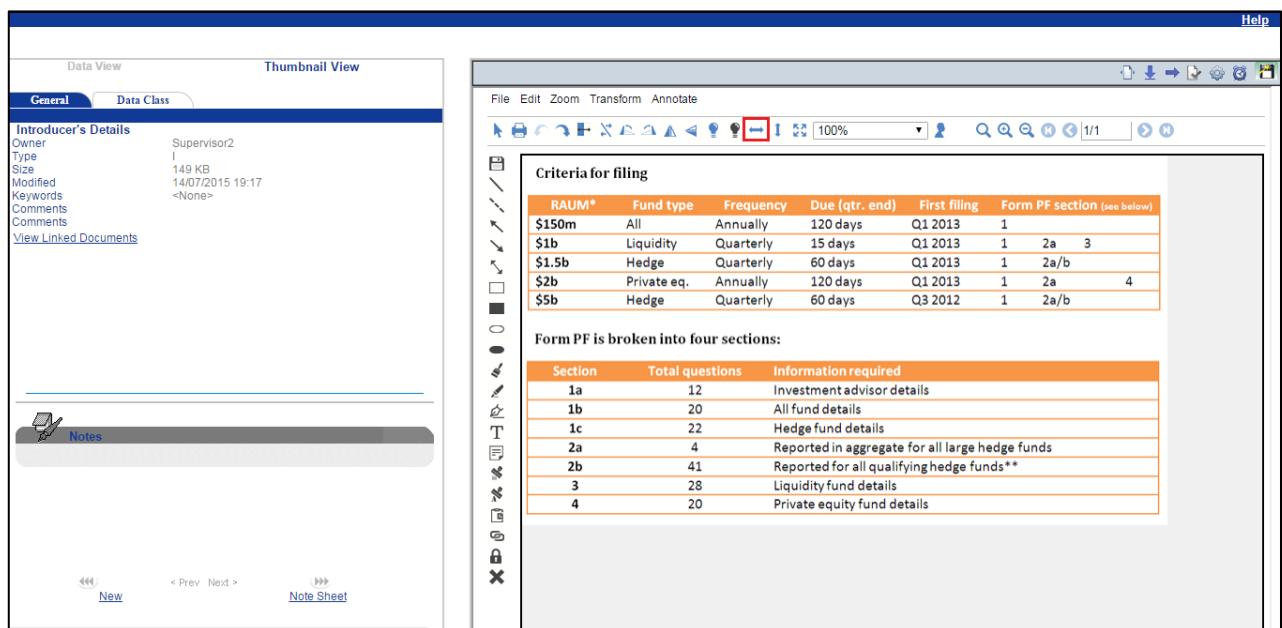


Figure: 3.14

Fit to Height button displays the document to the height of the OpAll.

1. Click Fit to Height button.
2. The document's height increases to that of the OpAll area.

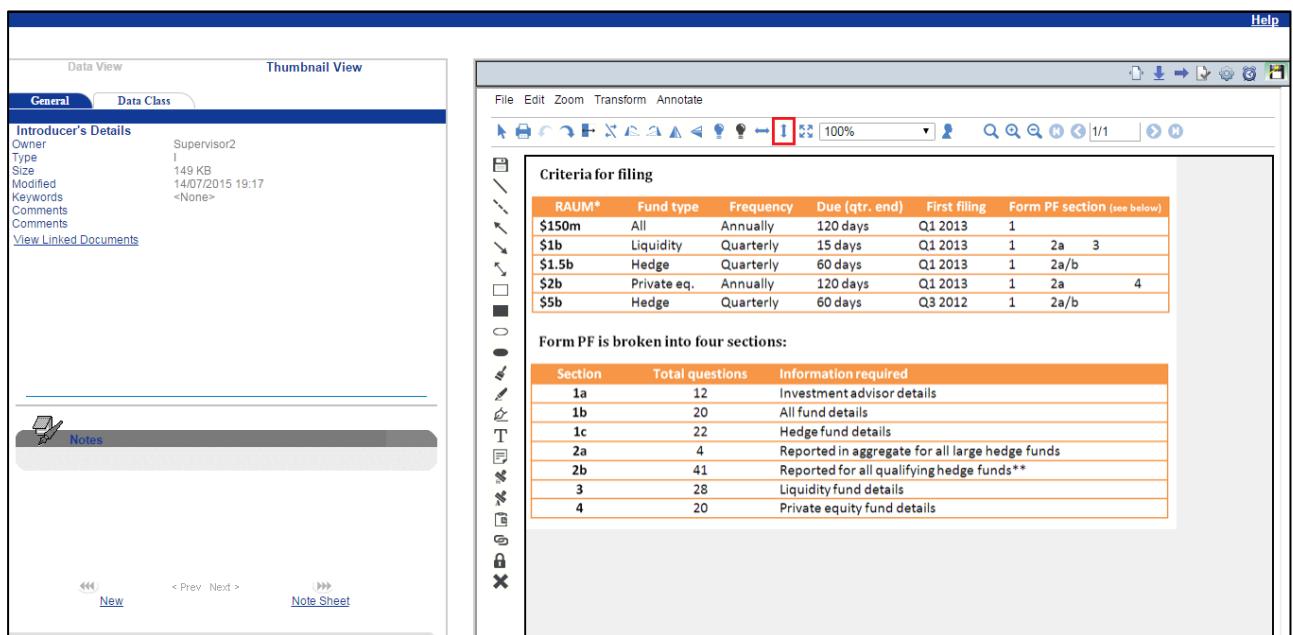


Figure: 3.15

Fit to Page button is similar to **Fit to Height** button. It displays the current page of the document in the whole of the OpAll area

1. Click **Fit to Page** button. The current page of the document is displayed in the OpAll area.

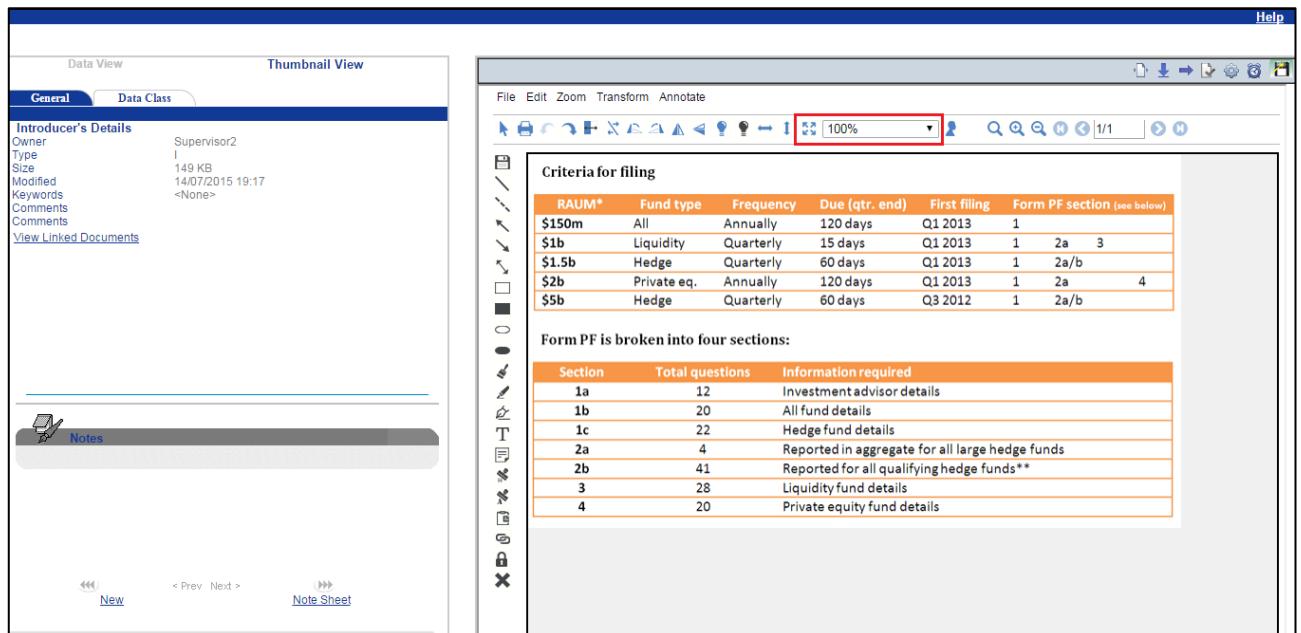


Figure: 3.16

 **Negate button** inverts the color of the document. For example, white turns black and vice versa.

1. Click the **Negate** button.

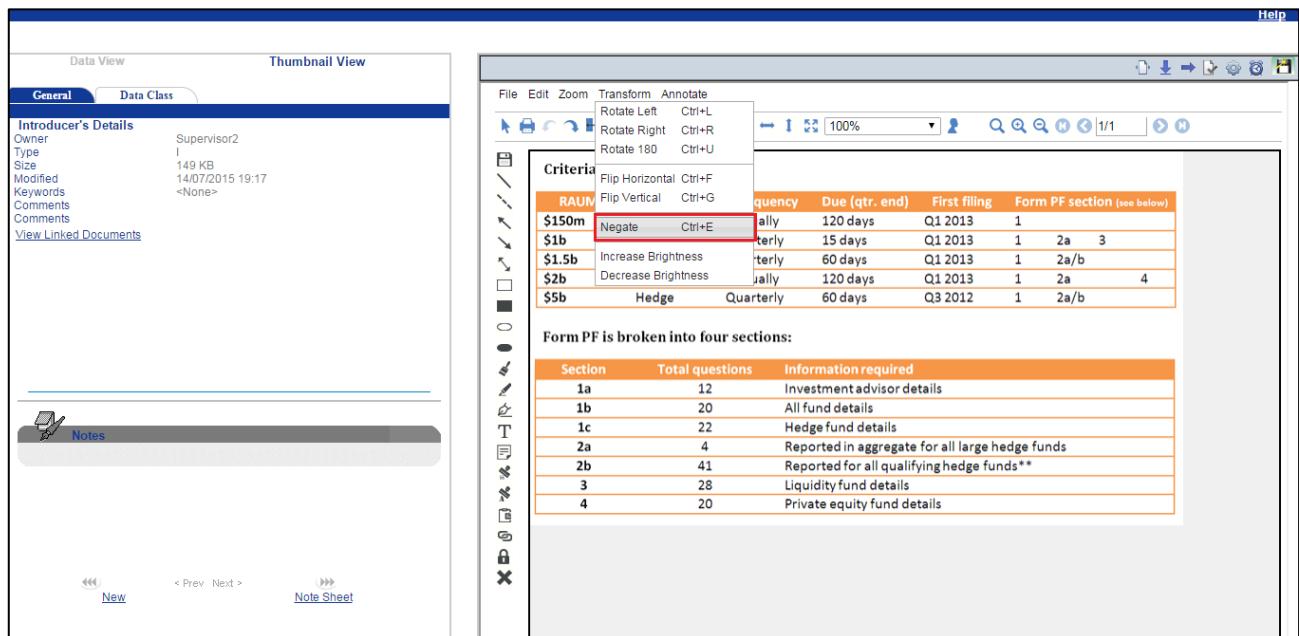


Figure: 3.17

2. Inverted color of the document is shown as:

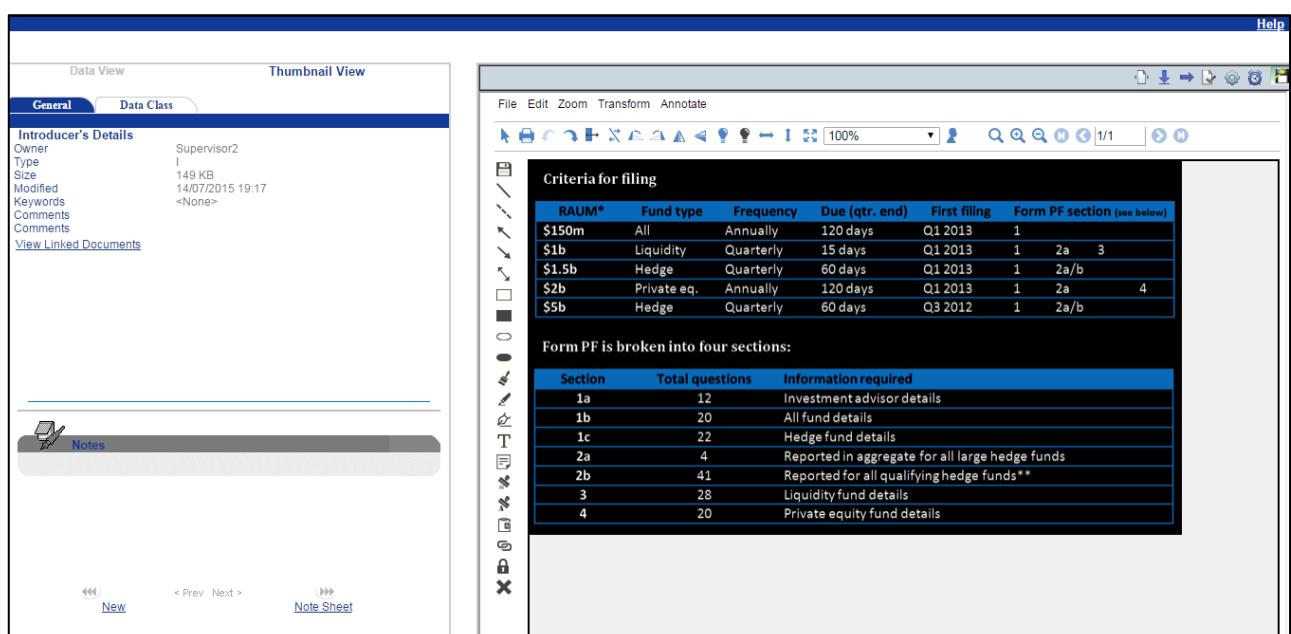


Figure: 3.18 Example for Negate button



Rotate Left button rotates the document left.

1. Click the Rotate Left button and save it.
2. The rotated left document is shown:

Frequency	Due (qtr. end)	First filing	Form PF section see below
Annually	120 days	Q1 2013	1
Quarterly	15 days	Q1 2013	1
Quarterly	60 days	Q1 2013	1
Annually	120 days	Q1 2013	1
Quarterly	60 days	Q3 2012	1

Four sections:

- 1. Information required
- 2. Investment advisor details
- 3. All fund details
- 4. Hedge fund details
- 5. Reported in aggregate for all large hedge funds*
- 6. Reported for all qualifying hedge funds*
- 7. Liquidity fund details
- 8. Private equity fund details

Figure: 3.19



Rotate Right button rotates the document right to its original position.

1. Click the **Rotate Right** button and save it.
2. The rotated right document is shown as:

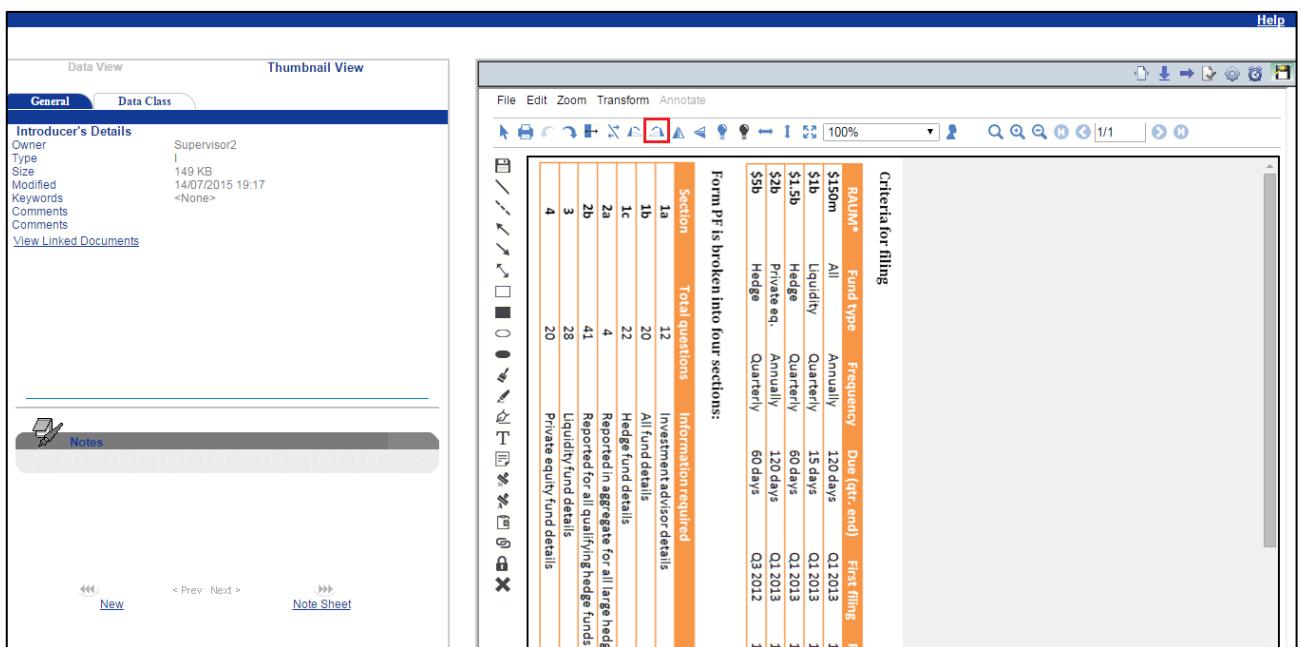


Figure: 3.20

NOTE:

The annotation toolbars, such as, Solid Line Drawing, Dashed Line Drawing, Leading Arrow line drawing, Trailing Arrow line drawing, Double Arrow line drawing, Rectangle drawing, Solid Rectangle drawing, Ellipse drawing, Solid Ellipse drawing, Wipe out drawing, High light drawing, Insert Text buttons are enabled only if the Enable Annotation Drawing button is clicked.



Flip Horizontal button horizontally flips the document.

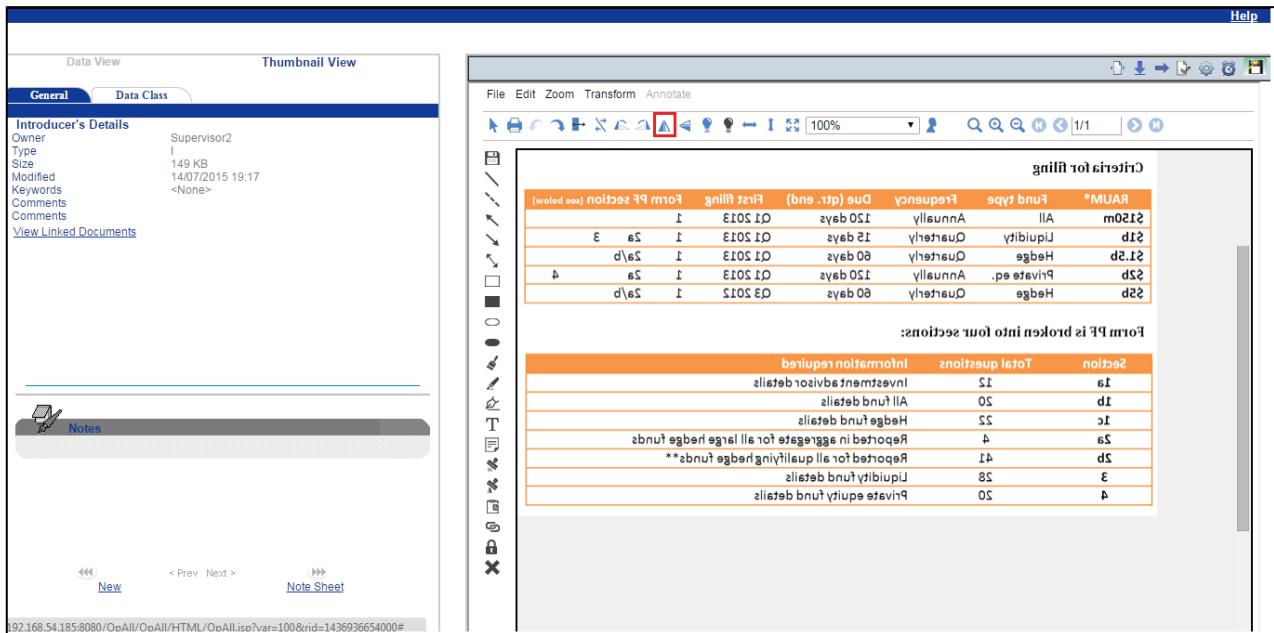


Figure: 3.21 Example of Flip Horizontal



Flip Vertical, Vertically flips the document.

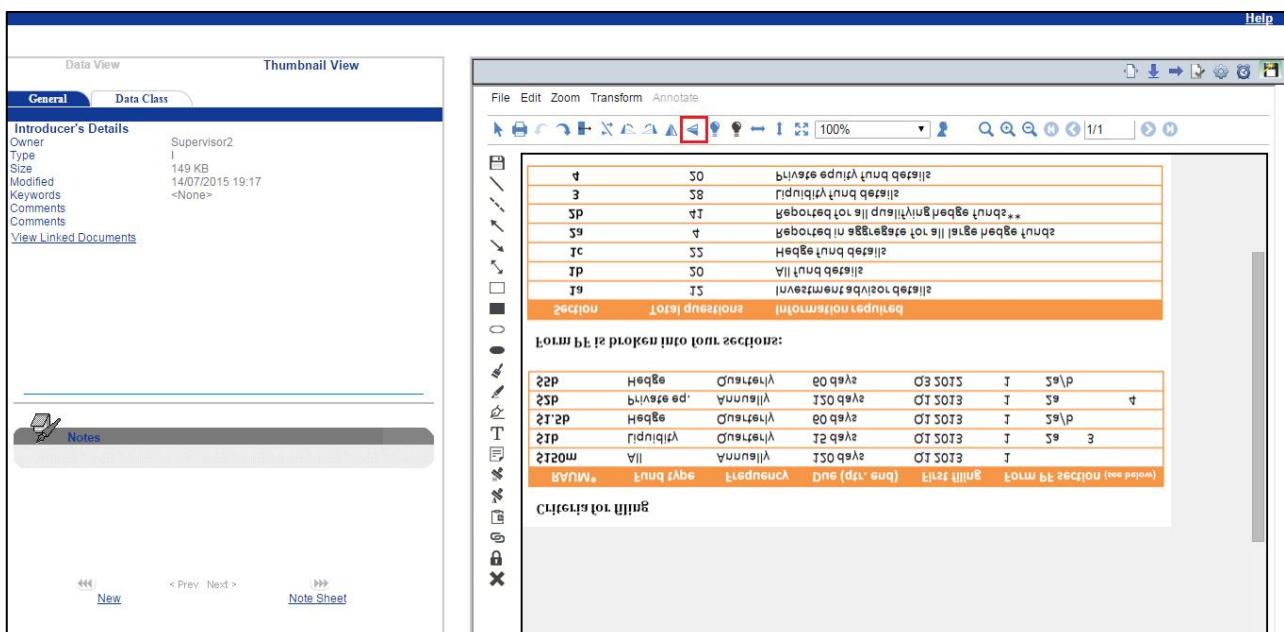


Figure: 3.22 Example of Flip Vertical



Increase Brightness, increases the brightness of the document for viewing purpose.

The screenshot shows the OpAll Viewer interface. On the left, there are two tabs: 'Data View' and 'Thumbnail View'. Below these are sections for 'Introducer's Details' and 'Comments'. A 'Notes' section is also present. On the right, there is a toolbar with various icons, and a main content area displaying a table titled 'Criteria for filing' and another table titled 'Form PF is broken into four sections:'. The 'Increase Brightness' button in the toolbar is highlighted with a red box.

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

Figure: 3.23 Example of Increase Brightness

Decrease Brightness, decreases the brightness of the document for viewing purpose.

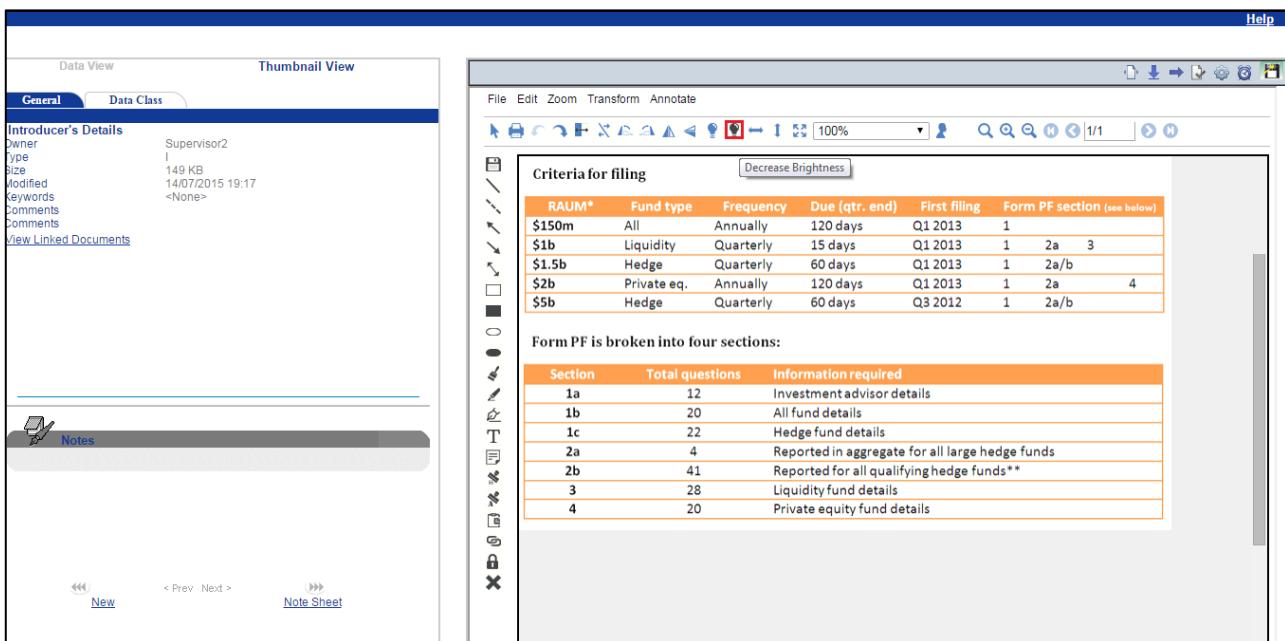


Figure: 3.24 Example of Decrease Brightness

Combo box

Select the required option.

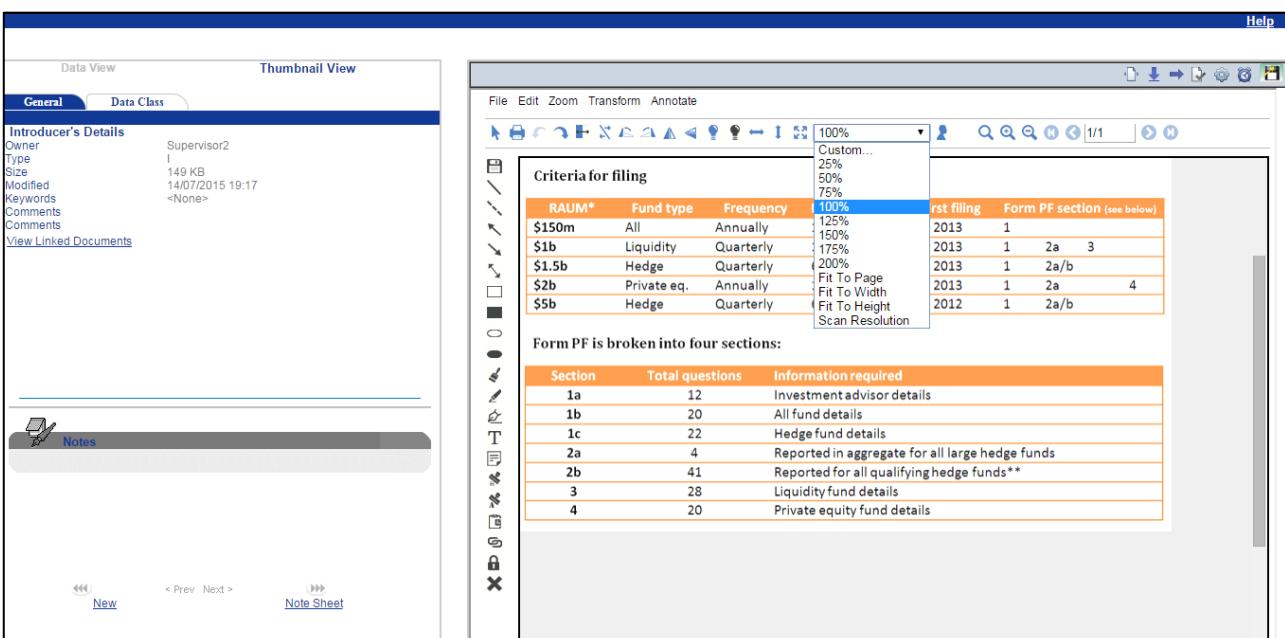


Figure: 3.25 Combo Box

Annotation Toolbar

 **Save Annotations** button saves the annotations applied by the user on the current document.

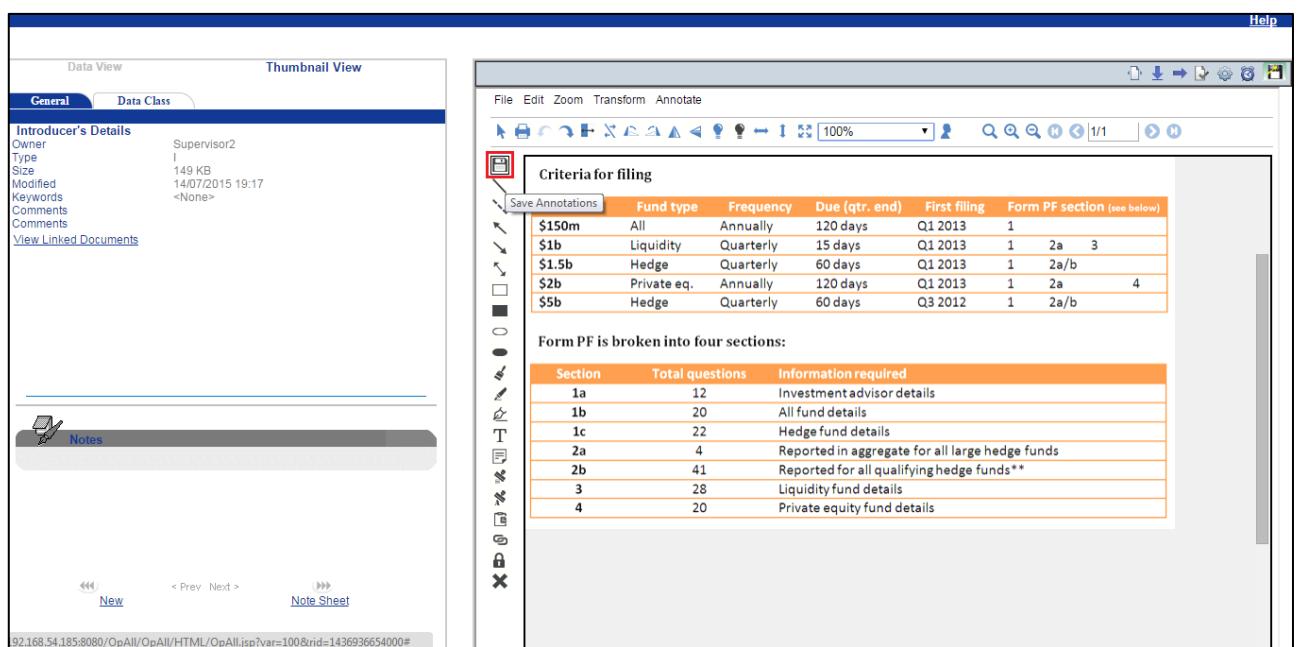


Figure: 3.26

 **Solid Line** Drawing button helps in drawing a line. Click Solid Line Drawing button. The cursor gets changed.

1. Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

Document Viewing – OpAll Viewer

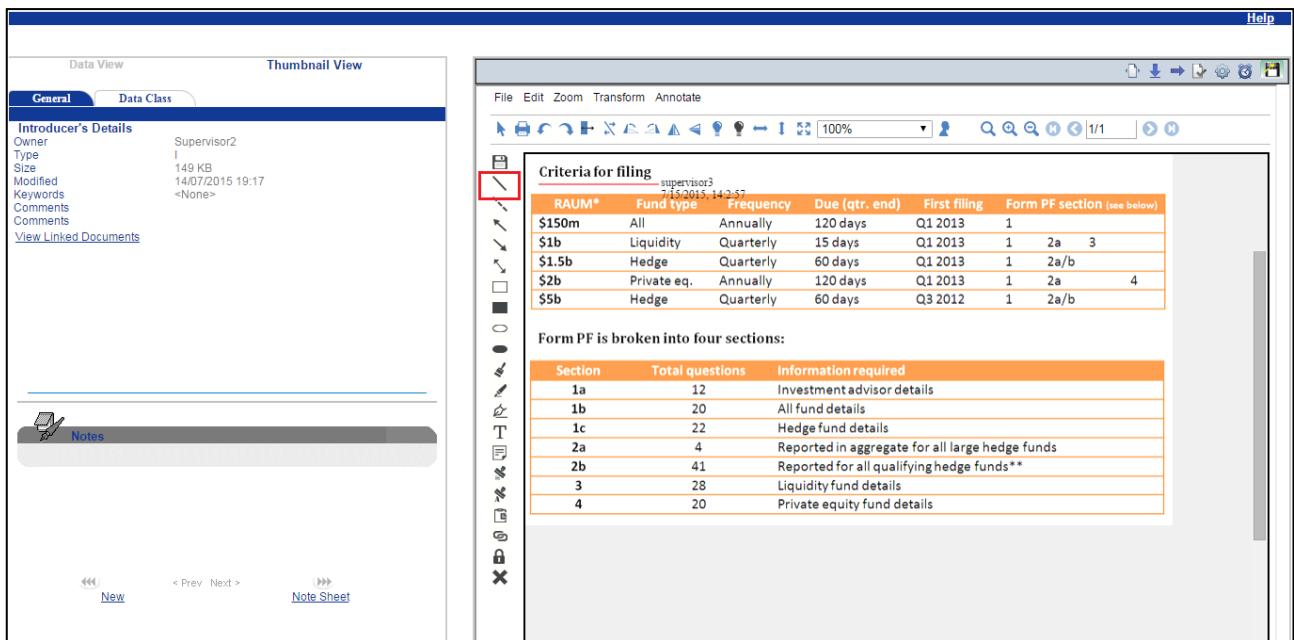


Figure: 3.27 Example of Solid Line drawing

2. To change the width of the line, color of the line, and the font. Select the line and right click. Select the Properties option.
3. The Annotation Properties dialog box gets invoked.

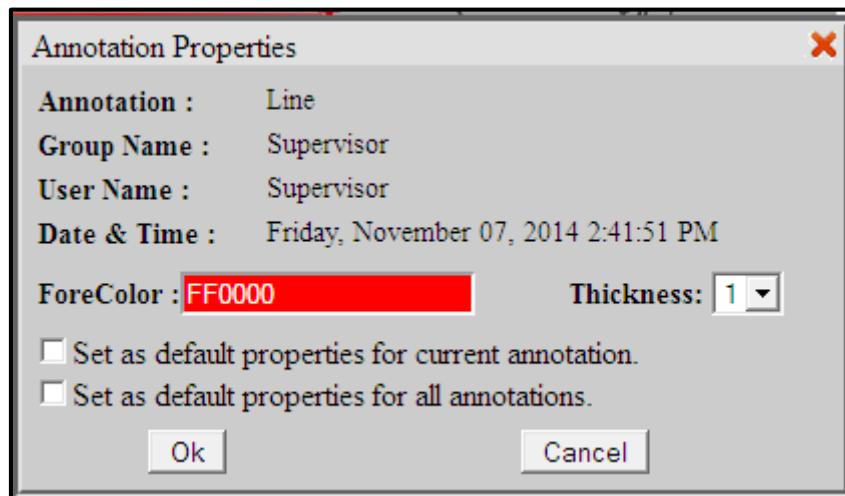


Figure: 3.28 Annotation Properties dialog box

4. Select the width of the line from the Pen Thickness combo box
5. Select the color from the different colors displayed.

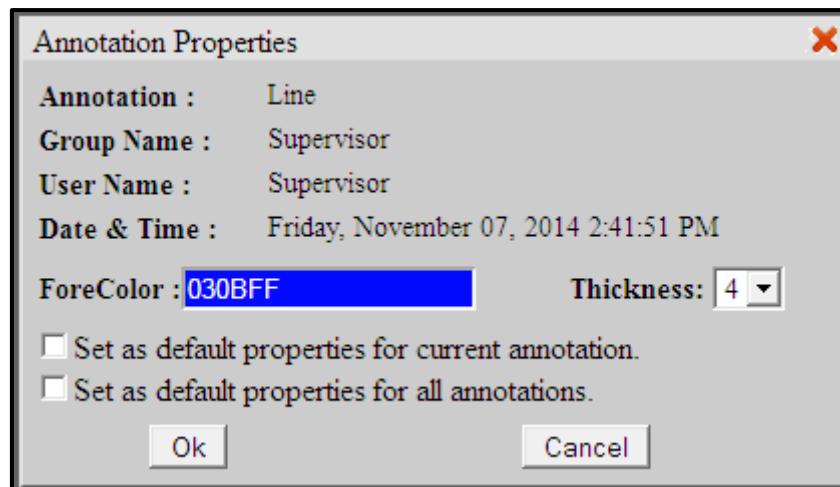


Figure: 3.29



Dashed Line Drawing button helps in drawing dashed lines.

1. Click the Dashed Line Drawing button, the cursor gets changed.
2. Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

The screenshot shows the Newgen OmniDocs application interface. On the left, there's a sidebar with "Data View" and "Thumbnail View" tabs, and a "General" tab selected. Under "General", there are sections for "Introducer's Details" (Owner: Supervisor2, Type: I, Size: 149 KB, Modified: 14/07/2015 19:17, Keywords: <None>), "Comments", and a "View Linked Documents" link. Below this is a "Notes" section with a pen icon.

The main area displays a table titled "Criteria for filing" with the following data:

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

Below the table, a note says "Form PF is broken into four sections:" followed by a table:

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

At the bottom of the interface, there are navigation buttons: <<< New, < Prev, Next >, >>>, Note Sheet, and a search bar.

Figure: 3.30



Leading Arrow Line drawing button helps in drawing an arrow starting from the tip of the arrow

1. Click the Leading Arrow Line drawing button, the cursor gets changed.
2. Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

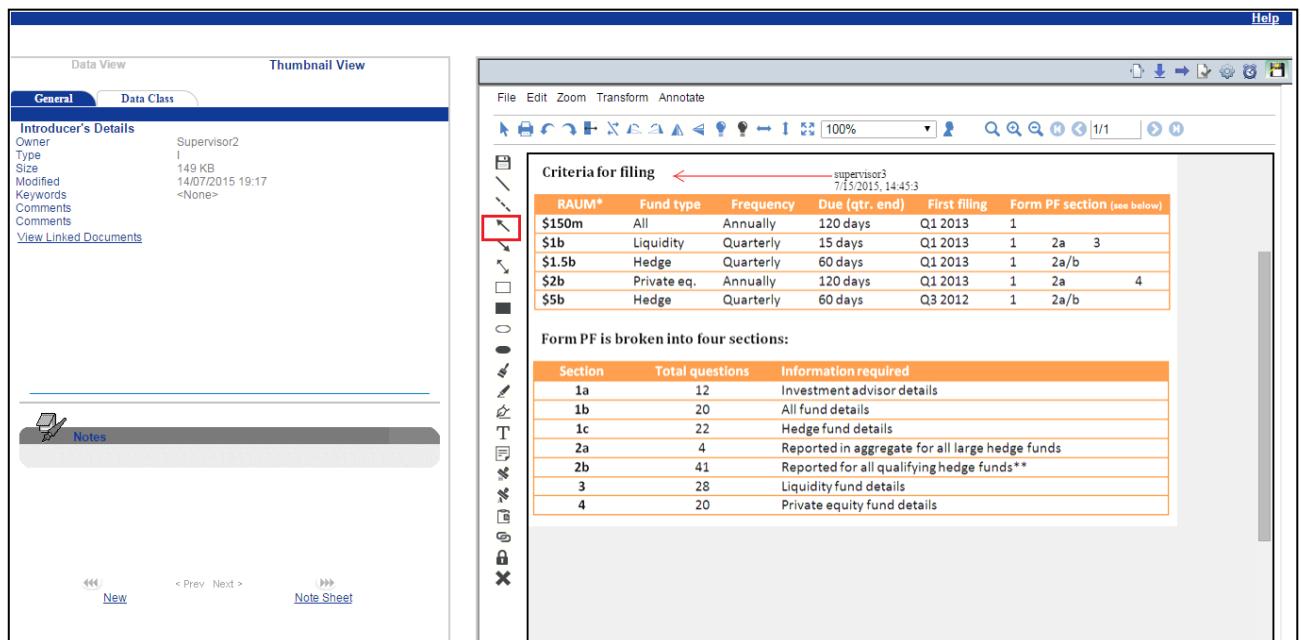


Figure: 3.31



Trailing Line Arrow button helps in drawing an arrow leaving behind a trail.

1. Click the Trailing Line Arrow button, the cursor changes.
2. Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

Document Viewing – OpAll Viewer

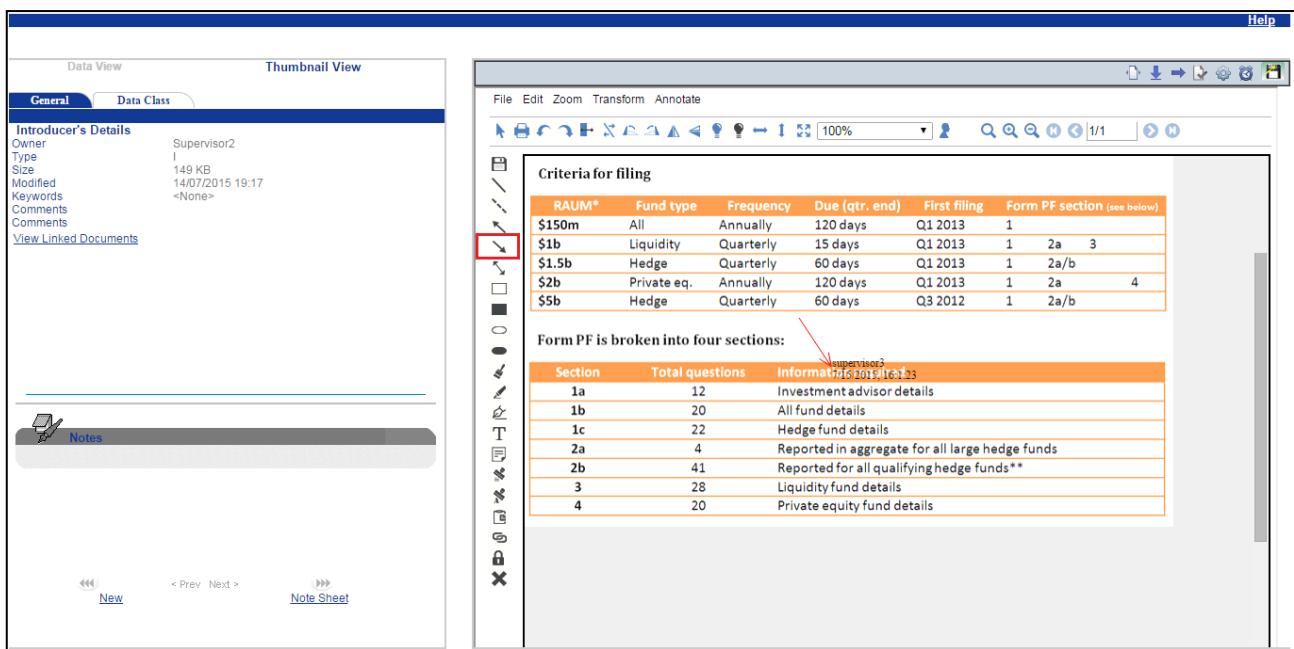


Figure: 3.32

 **Double Arrow** Line Drawing button helps in drawing a line having arrow heads on both the sides.

1. Click the Double Arrow Line Drawing button, the cursor changes.
2. Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

Document Viewing – OpAll Viewer

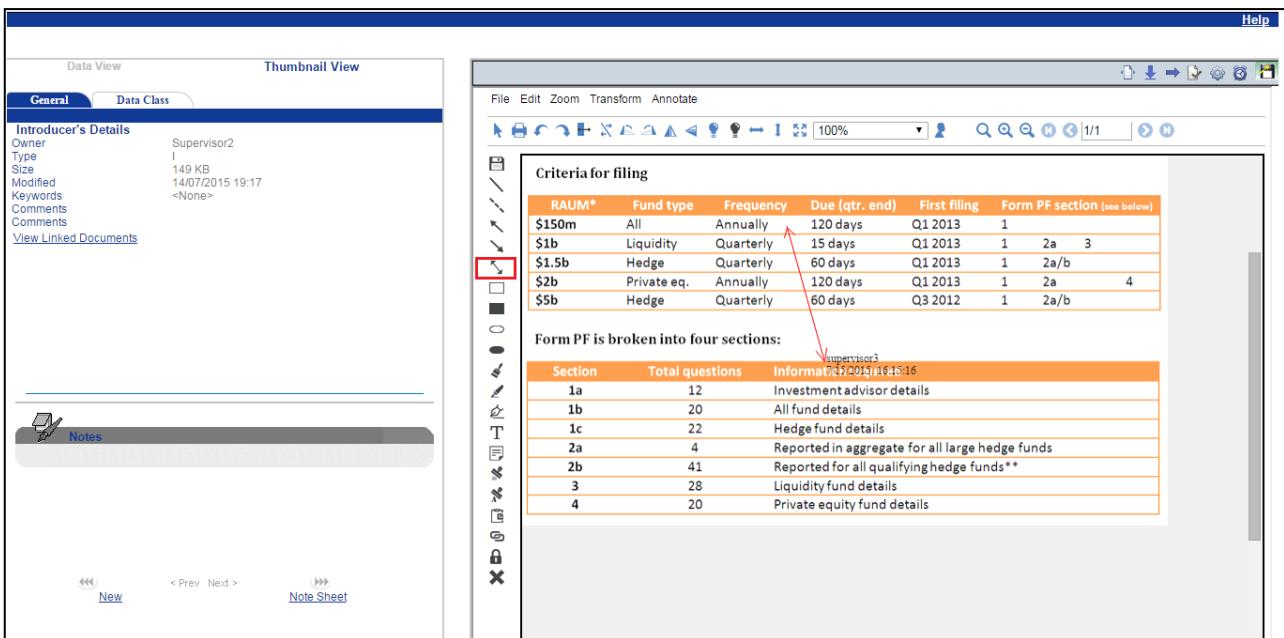


Figure: 3.33



Rectangle Drawing helps in drawing an empty rectangle.

1. Click the Rectangle Drawing button, the cursor changes.
2. Click the cursor in the position where you want to the rectangle to start and drag it to the point till where you want the rectangle to end.

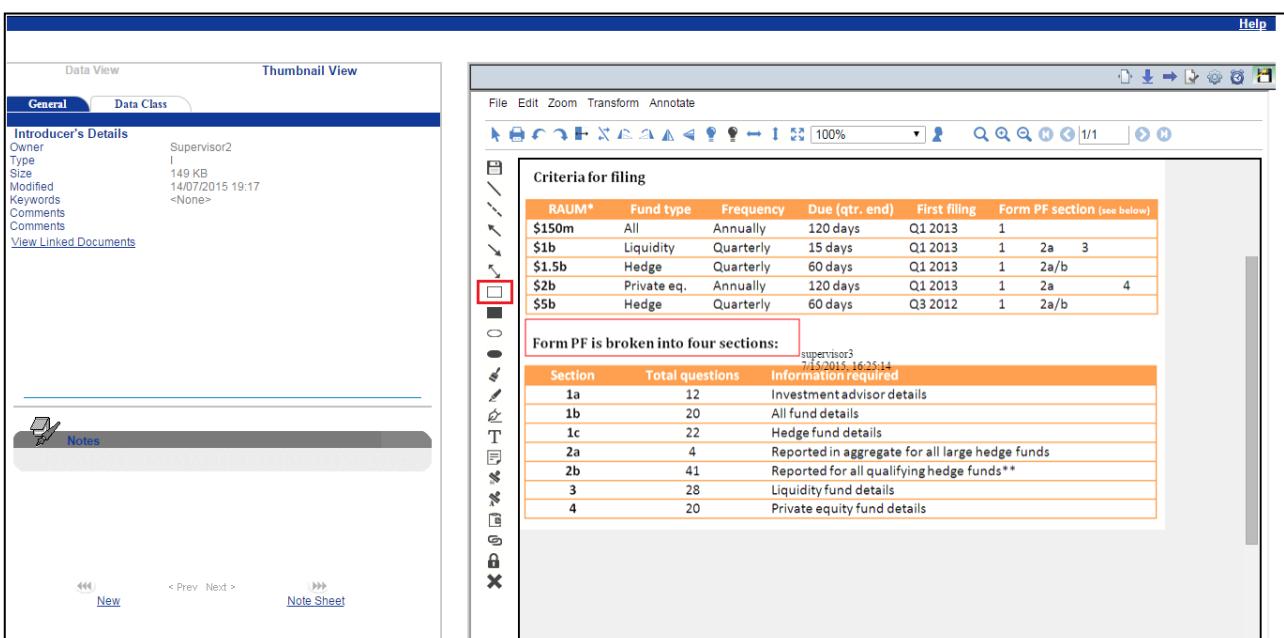


Figure: 3.34



Solid Rectangle Drawing button helps in drawing a filled rectangle.

1. Click the Solid Rectangle Drawing button, the cursor changes.
2. Click the cursor in the position where you want to the rectangle to start and drag it to the point till where you want the rectangle to end.

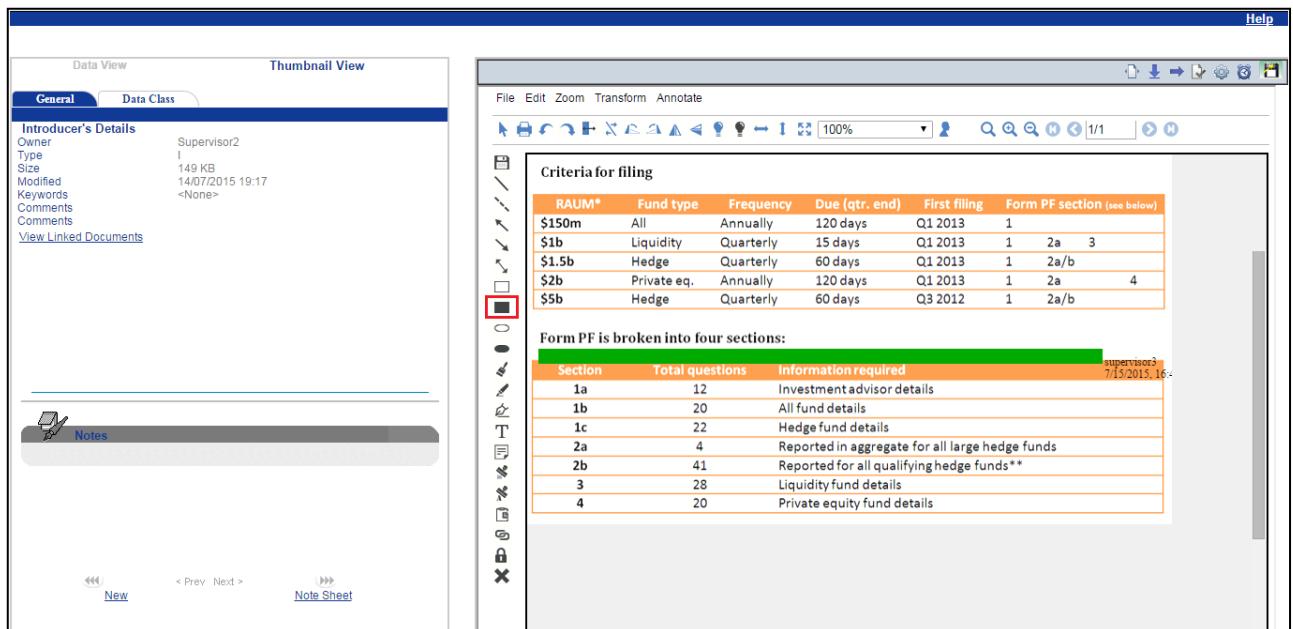


Figure: 3.35



Ellipse Drawing button helps in drawing an empty ellipse.

1. Click the Ellipse Drawing button, the cursor changes.
2. Click the cursor in the position where you want the ellipse to start and drag it to the point till where you want the ellipse to end.

Document Viewing – OpAll Viewer

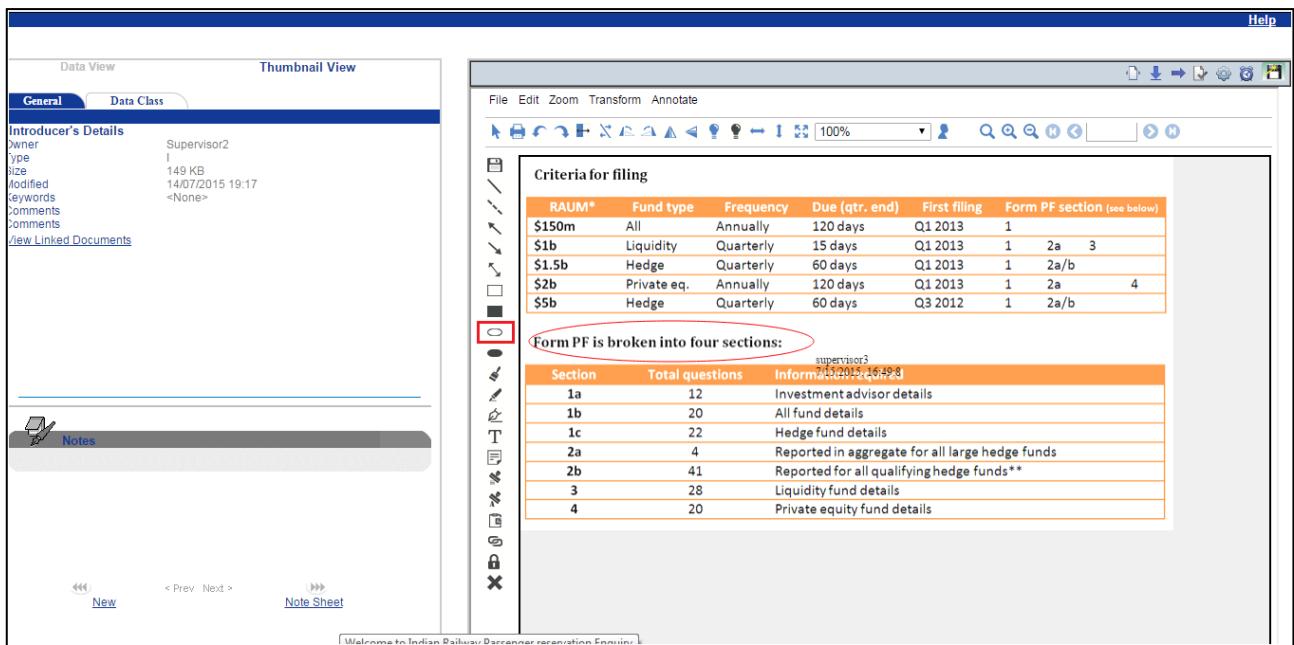


Figure: 3.36



Solid Ellipse Drawing button helps in drawing a filled ellipse.

1. Click the Solid Ellipse Drawing button, the cursor changes.
2. Click the cursor in the position where you want to the ellipse to start and drag it to the point till where you want the ellipse to end.

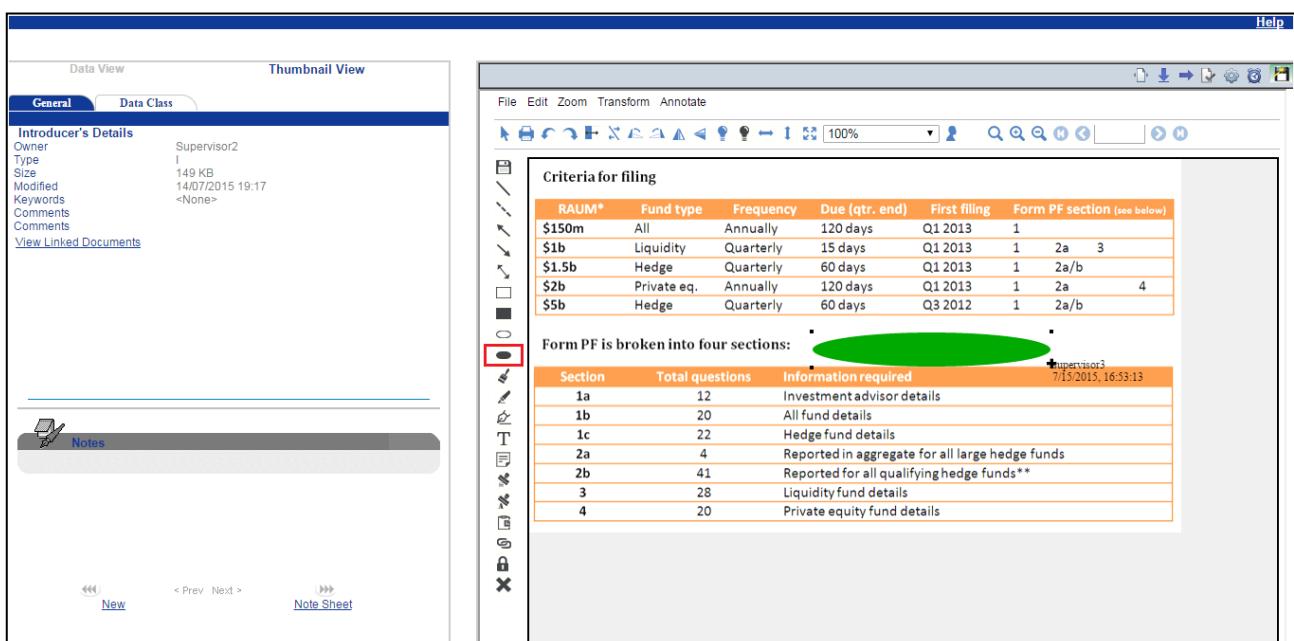


Figure: 3.37

 **Wipe Out Drawing:** This Annotation feature helps in wiping out some part of the image using a black or white Rectangle.

1. Click the **Wipe Out Drawing** button, the cursor changes.
2. Click the cursor in the position where you want to start the drawing and drag it to the point till where you want it.

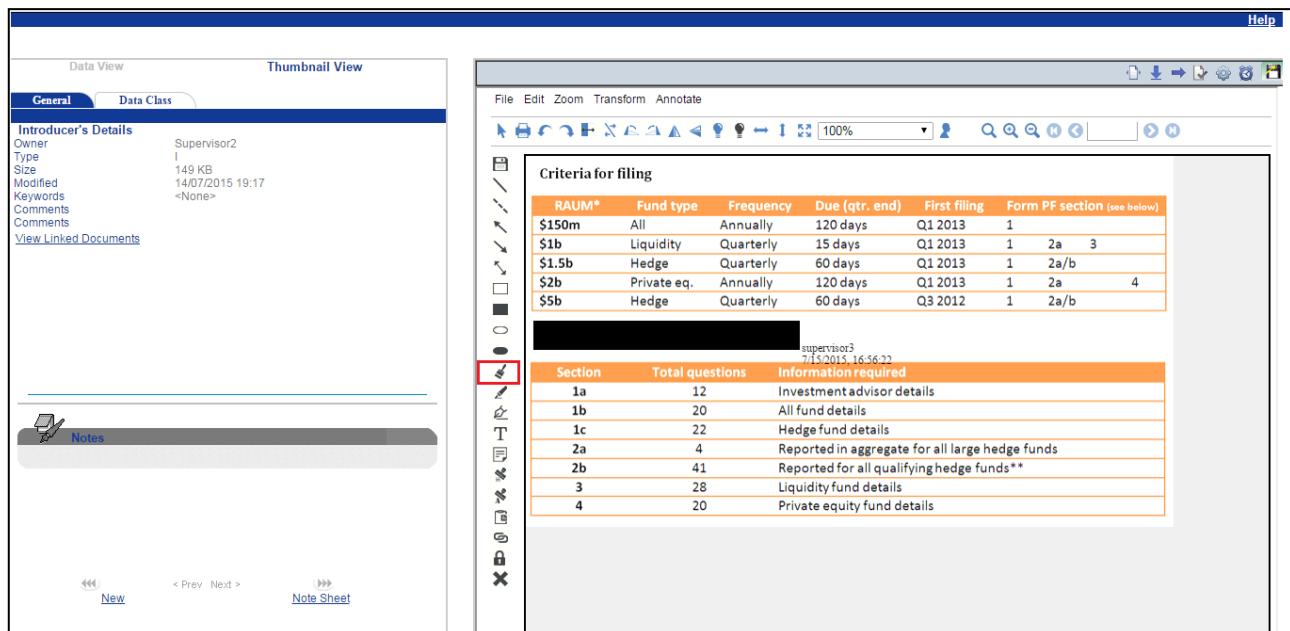


Figure: 3.38



Highlight Drawing button helps in highlighting the selected text.

1. Click **Highlight Drawing** button, the cursor changes.
2. Click the cursor from the start point of the text and drag it to the point till where you want the text to be highlighted.

Document Viewing – OpAll Viewer

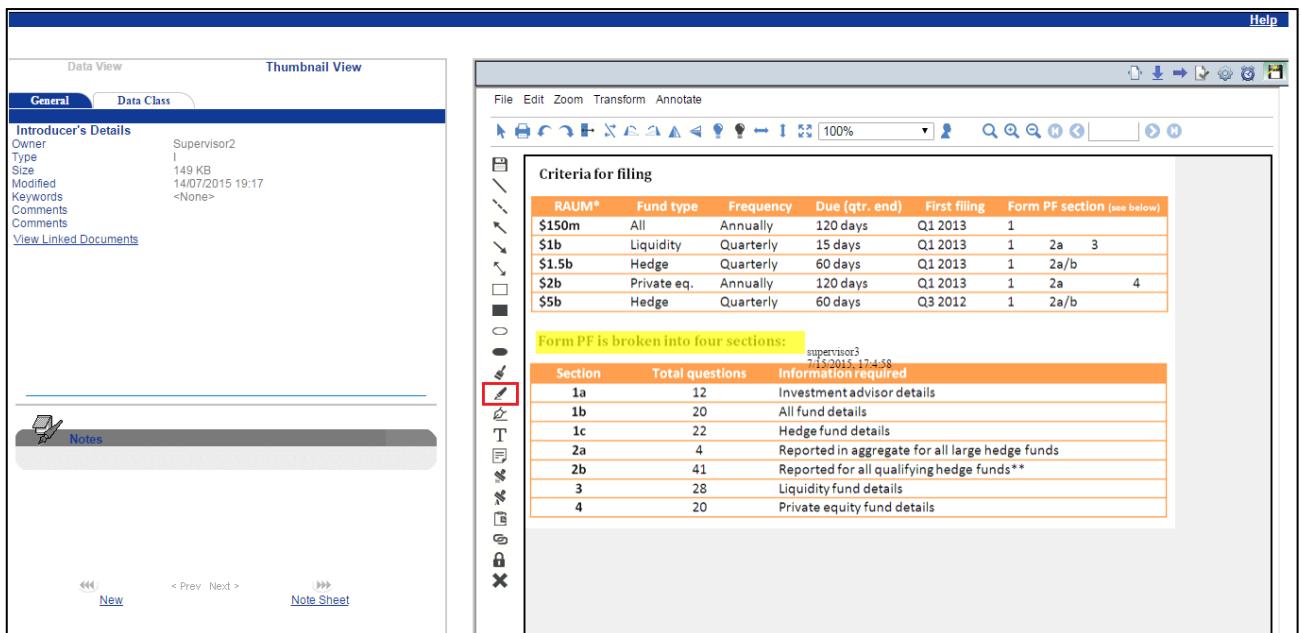


Figure: 3.39

 **Free Hand Drawing button:** It helps the user to perform free hand drawing over the document.

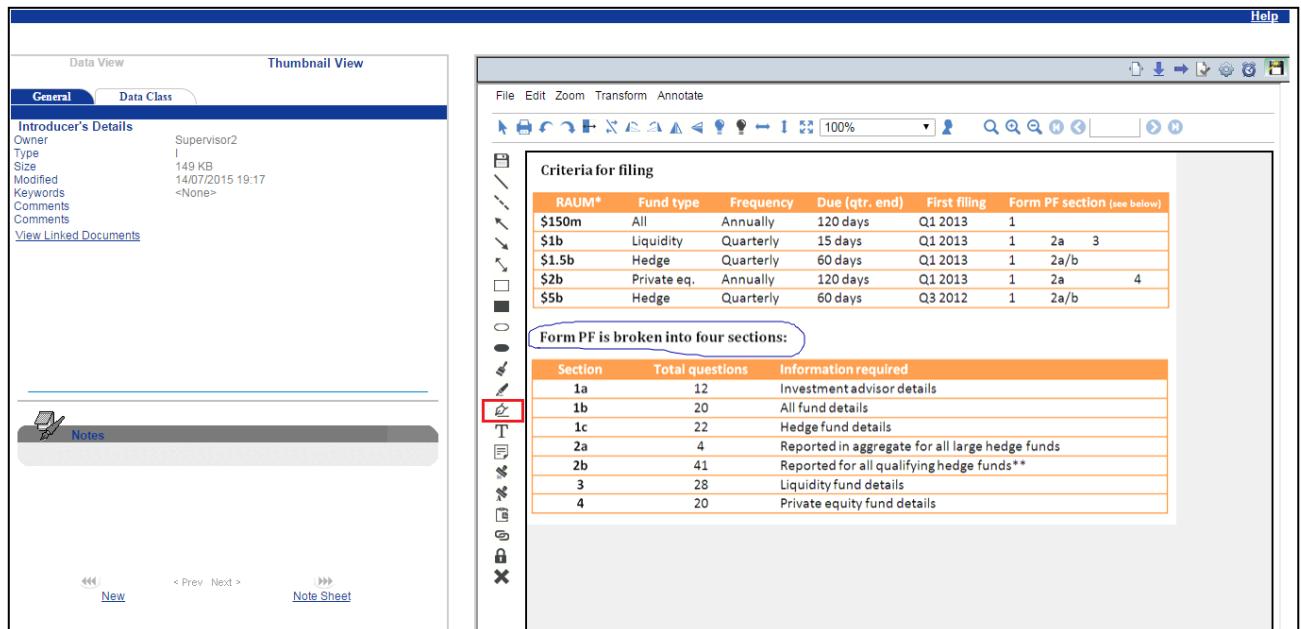


Figure: 3.40

 **Insert Text** button helps in inserting text in the documents wherever required.

1. Click the Insert Text button, the cursor changes.
2. Click the cursor where you want the text to be inserted, and release the cursor. As the user begins inserting text, the textbox increases on its own.

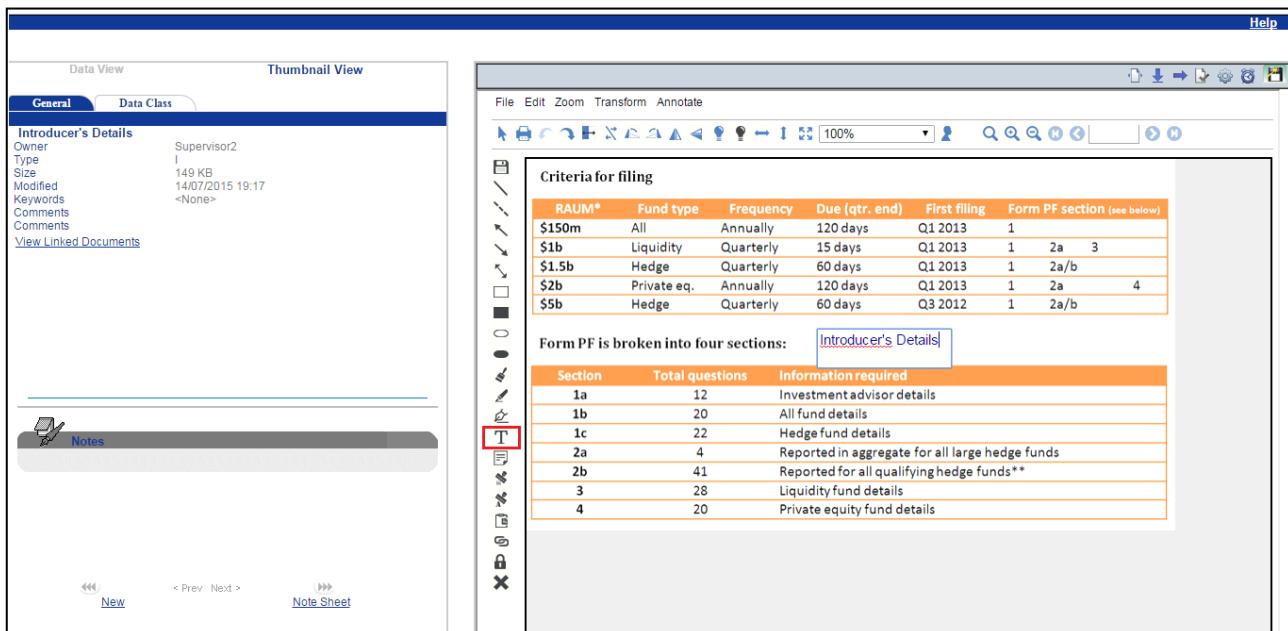


Figure: 3.41

Sticky Note button helps in sticking note text in the documents wherever required.

1. Click the **Sticky Note** button, the cursor changes.
2. Click on the Document where you want to stick the note. As the user begins inserting text, the textbox increases on its own.

Document Viewing – OpAll Viewer

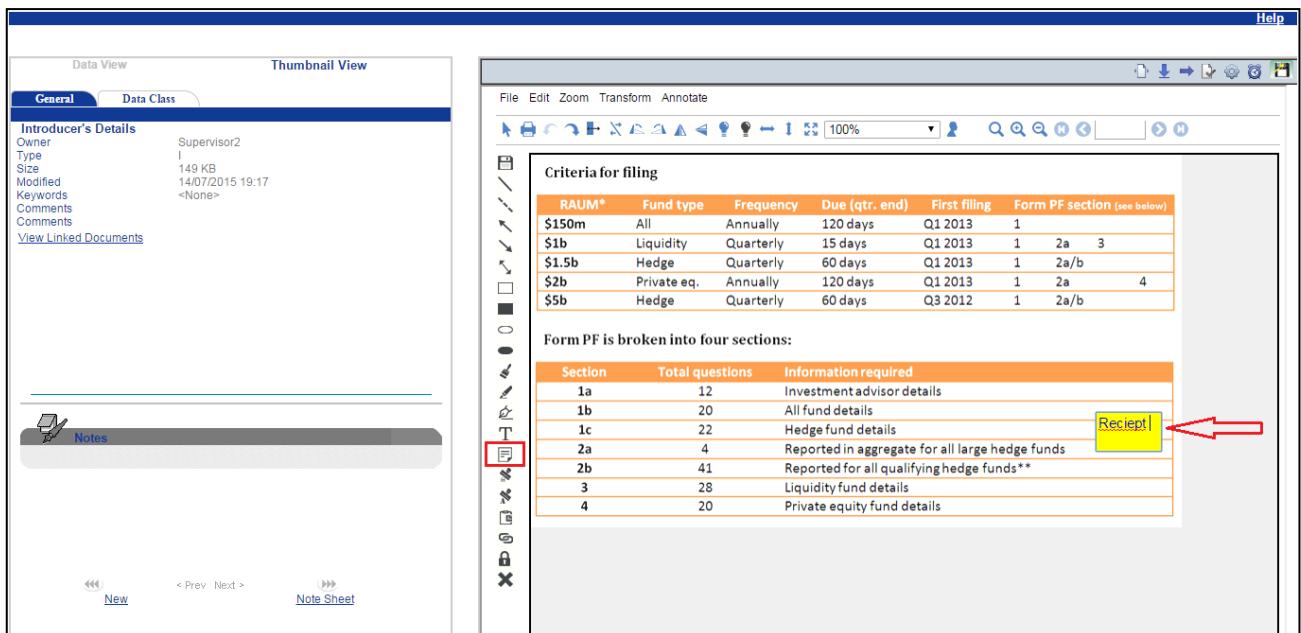


Figure: 3.42

Attach a Note button helps in attaching note text with the documents.

1. Click the **Attach a Note** button, the cursor changes.

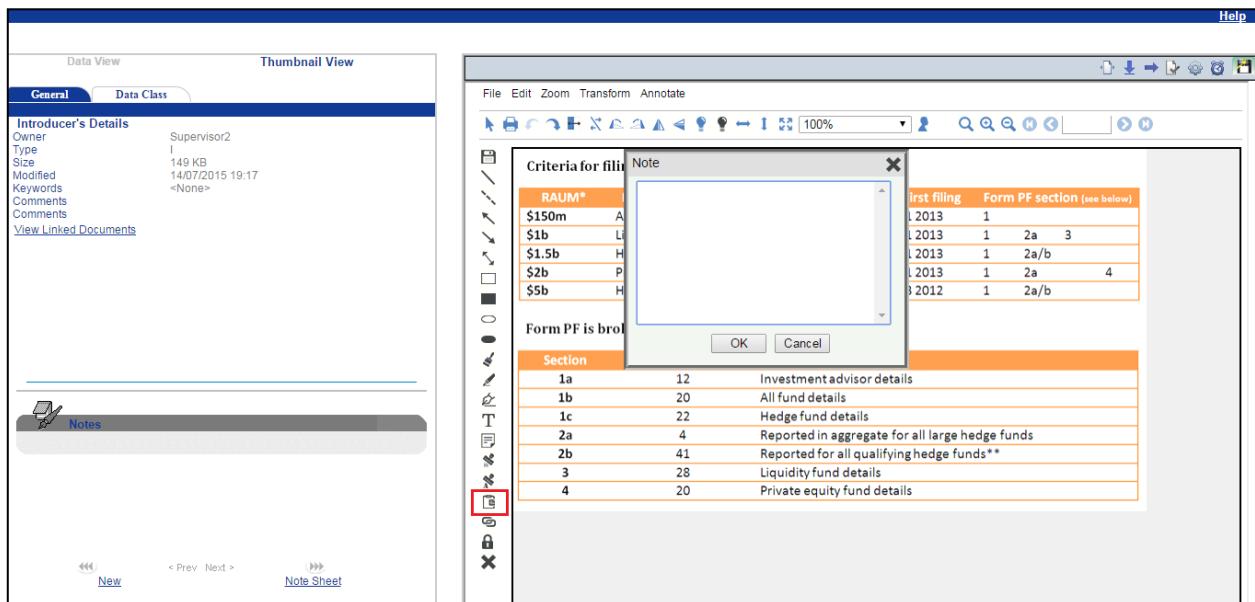


Figure: 3.43

2. Click on the document. A **Note** Dialog box opens. Write the note, and click **OK** to save it. Or, click **Cancel** to close the dialog box, without making any changes.

 **Secure Annotation:** The ImageView OpAll in which image documents are viewed from OmniDocs Web, is a multi-user compatible. As many users can access, view and modulate the images according to their requirements. Annotation Groups have been added as a security feature. Groups imply that the applied annotations can be stored under a common heading or headings. Once these groups are created, the administrator can define different levels of rights on various groups to different users.

To secure annotations follow the following trace:

1. Click Secure Annotation button. The following screen gets invoked.

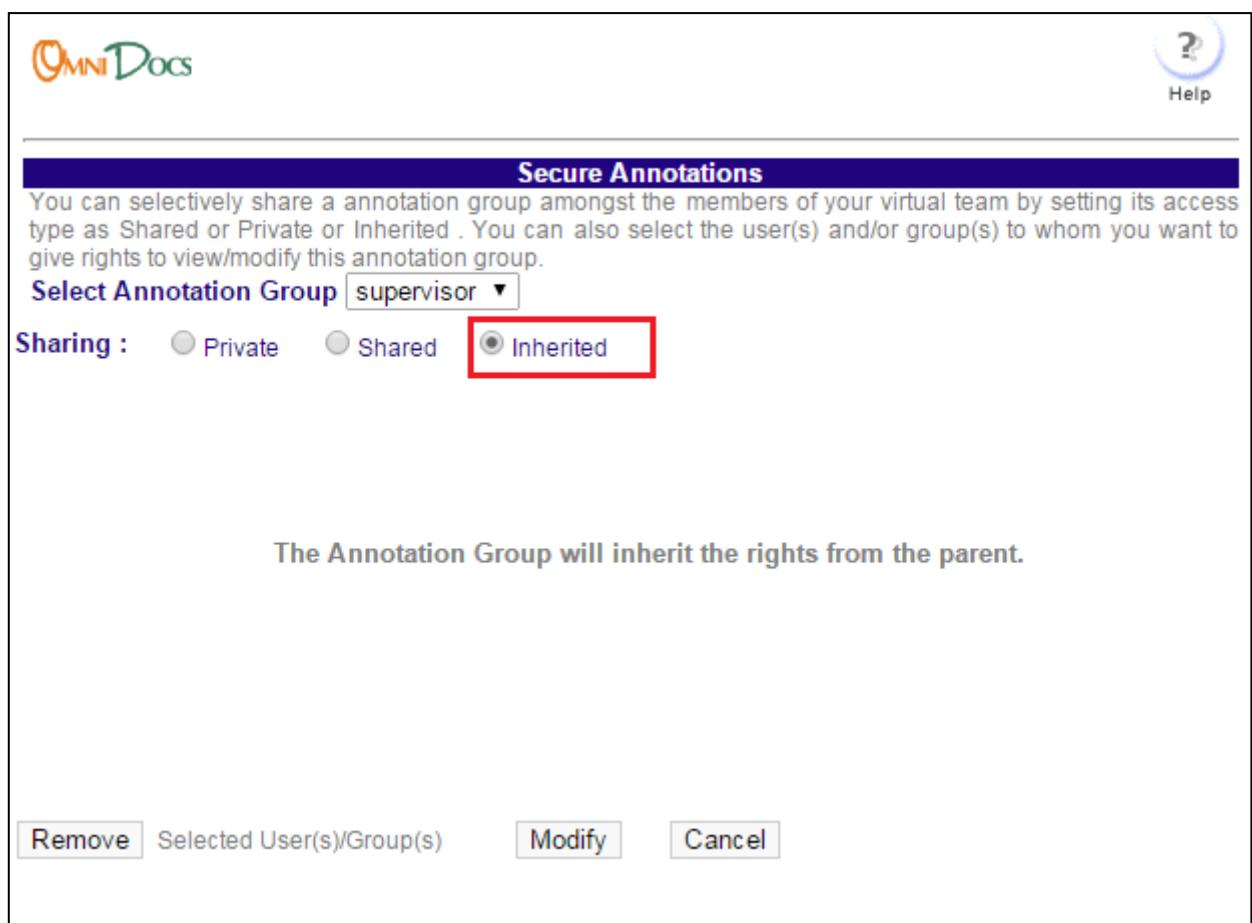


Figure: 3.44

2. By default, all groups defined will possess inherited rights. To assign Private rights to the group, select the **Private** option. The following screen gets invoked.

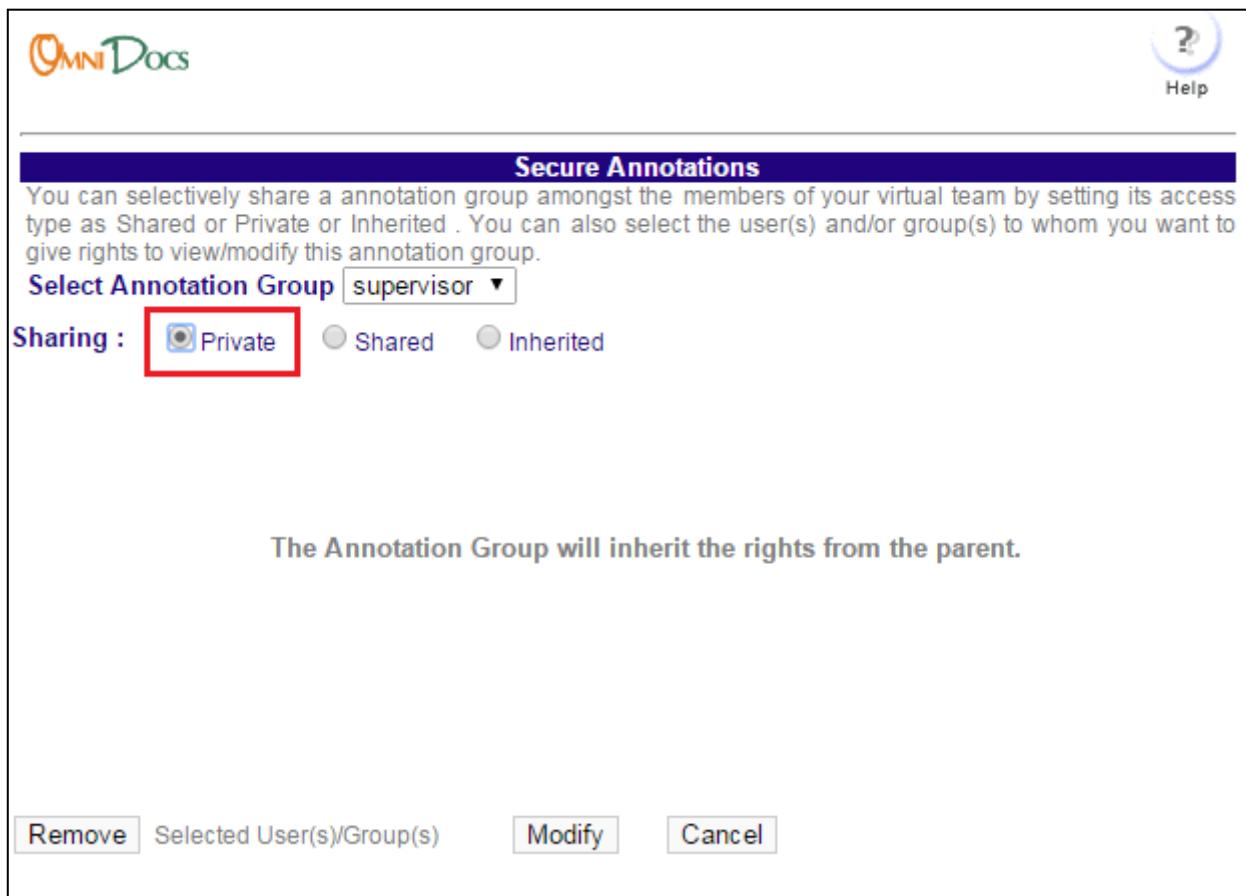


Figure: 3.45

3. To assign Shared rights on the group, select the **Shared** option. The following screen gets invoked.
4. Click **Modify** to save the changes made.
5. Click **Cancel** to close the Annotation Sharing window without saving the changes made.



Figure: 3.46

NOTE:

To allot rights on different annotation groups, the user must have the privilege of Assign Rights which is set from the OmniDocs Administration.

To assign rights on annotation groups, the user should either be a supervisor/owner of the document, or should have Modify rights on the document.

Adding Notes to Documents

The feature of adding notes to documents is provided in OpAll Viewer.

To add notes to a document, follow the following trace:

1. Click **New** command button and specify note.
2. This Command button is a toggle between **New** and **Cancel**. **New** button allows assigning the Notes. **Cancel** button allows closing the dialog box without assigning the notes.
3. To save the note along with the document: click **Save** command button.

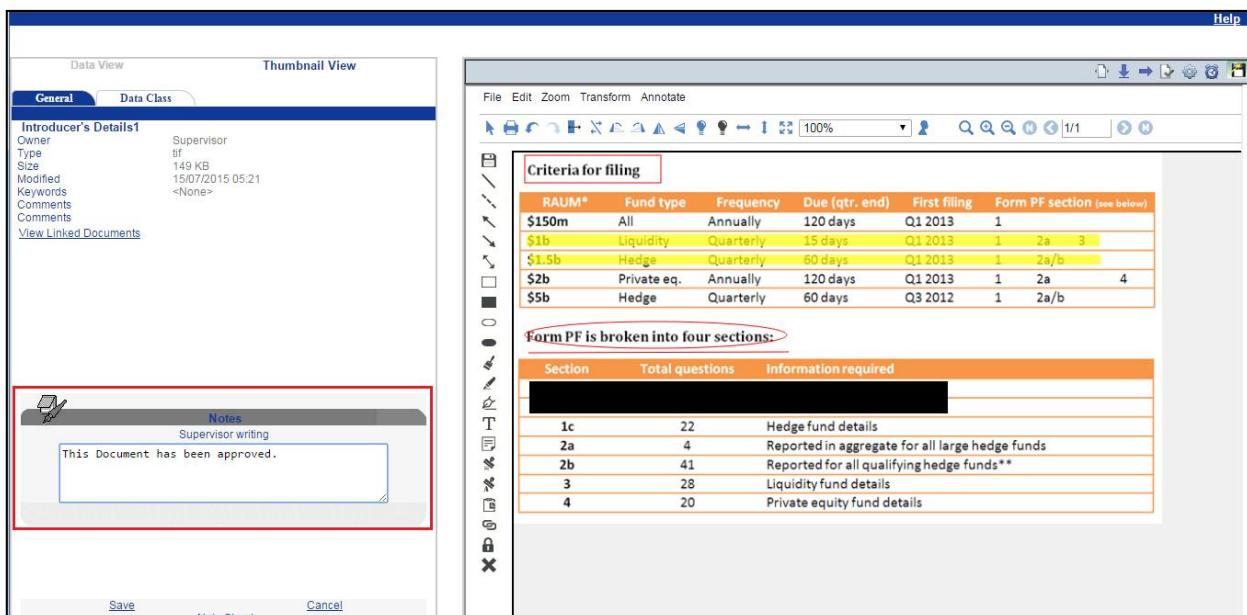


Figure: 3.47

4. This command button is again a toggle between **Save** button and Secure button. Secure button allows assigning rights on the Notes in order to secure the attached notes with document. Save button allows saving the note along with the specified rights.
5. To browse the next and previous notes attached to a document, click the respective arrows.

Notesheet

Notesheet is a feature, which is provided in the View Menu of OpAllViewer. Notesheet displays all the notes attached to a document by any user. You can view all the notes attached to a document by either a particular user or all users by selecting from View Notes of User combo box.

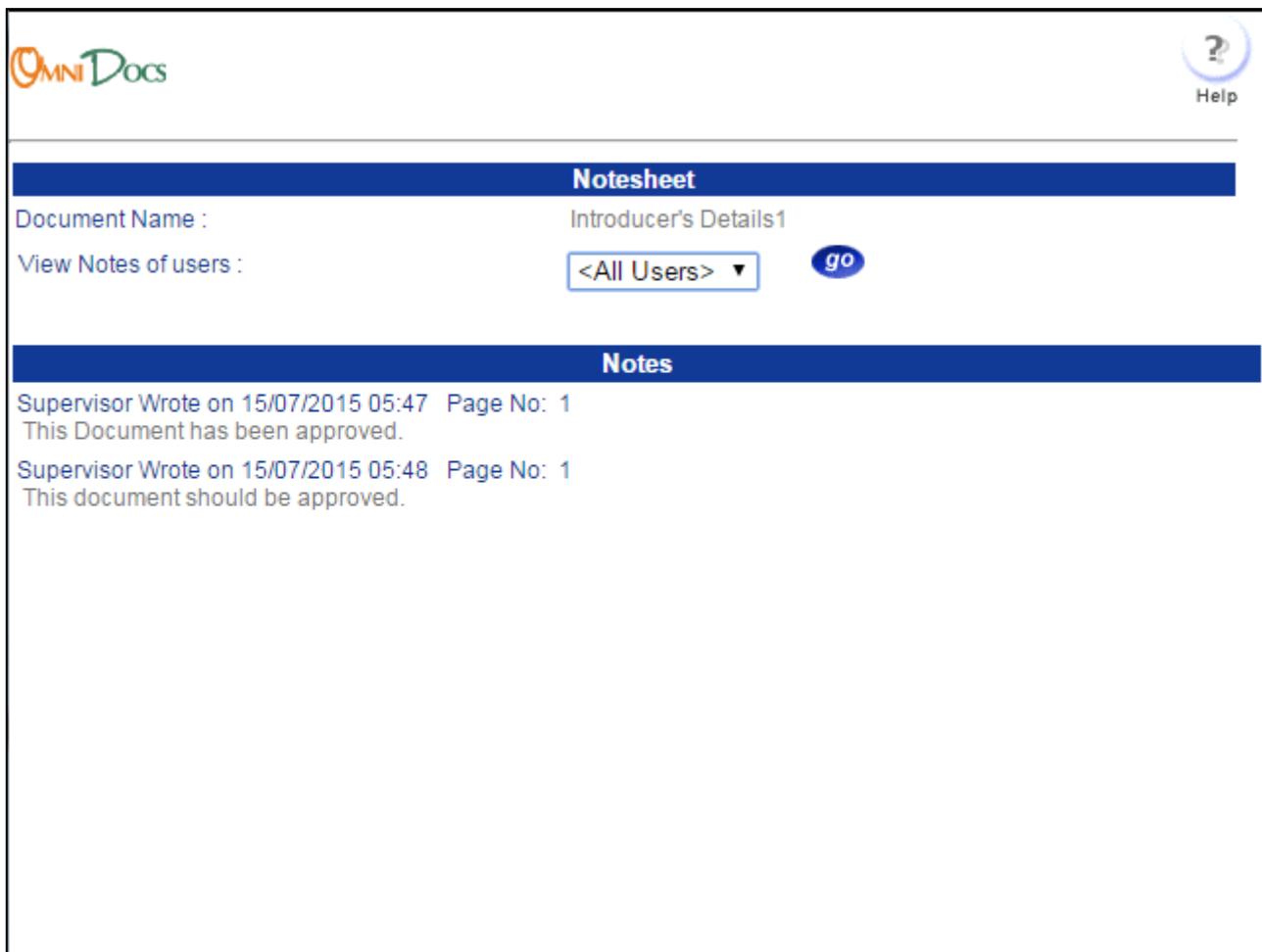


Figure: 3.48

Stamp

Stamps are image annotations, which will be available for applying on image documents once they are registered in OmniDocs. The usage of stamps is divided into two steps, **registration/un-registration** of stamp images and applying registered stamps on the image documents.

Registration and un-registration of stamps can be done from OmniDocs's Admin application.

Applying registered stamps on an image document:

1. Click the second last button in the vertical toolbar to enable the stamp available dialog box for selecting the stamp to be applied in the image document.
2. Click the **drop-down** arrow to select the stamp to be applied to the document and click the **OK** button.

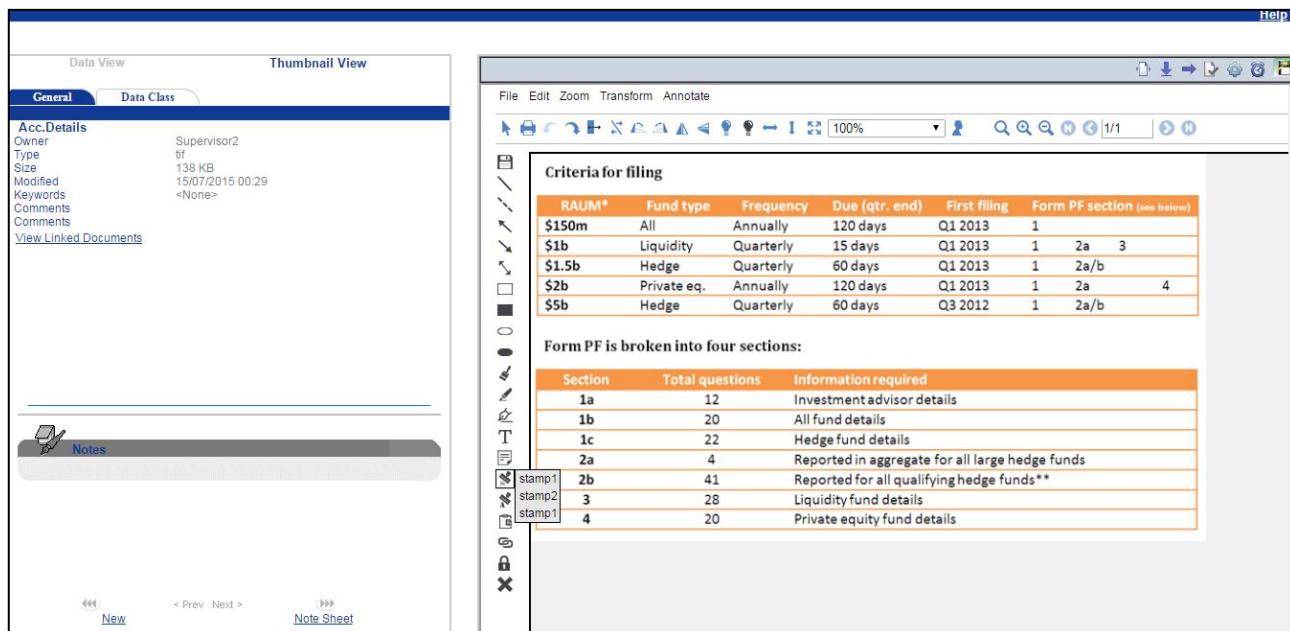


Figure: 3.49

3. The selected stamp is visible on the document and click the **Save** button to save the stamp on the image document.

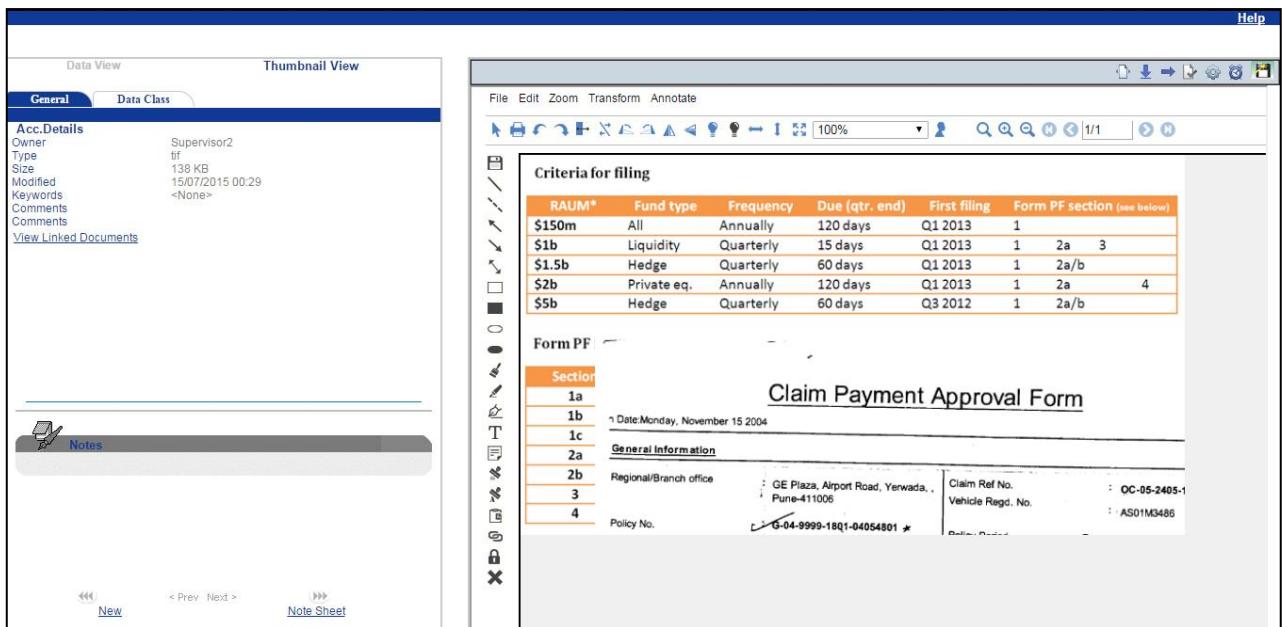


Figure: 3.50

Applying Image Stamps to the Documents

Stamps are image annotations, which will be available for applying on image documents once they are registered in OmniDocs. The usage of stamps is divided into two steps: registration/unregistration of stamp images and applying registered stamps on the image documents.

Registration and unregistration of stamps can be done from OmniDocs's Admin application.

To register/unregister stamp images follow the following trace:

1. Click the **Manage Stamps** link in the top-right corner of the home page Option of the Admin application.

Document Viewing – OpAll Viewer

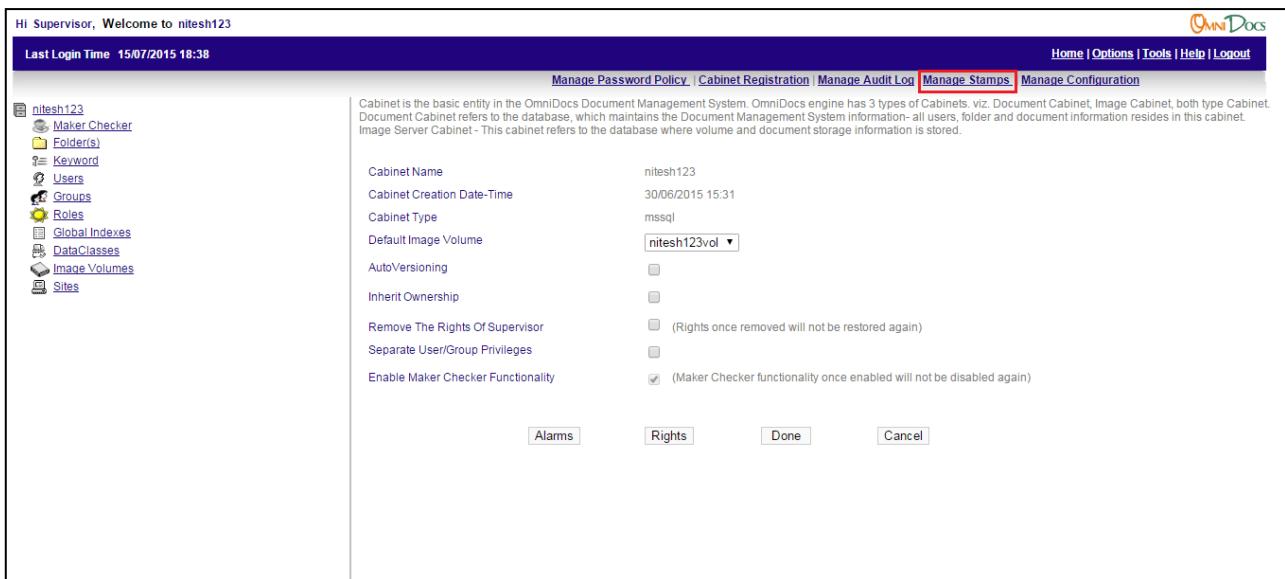


Figure: 3.51

2. Click the **Register Stamps** button to add a stamp for use in the document.
3. The user can click the **Unregister Stamps** button to remove a stamp from the list of registered stamps for use.

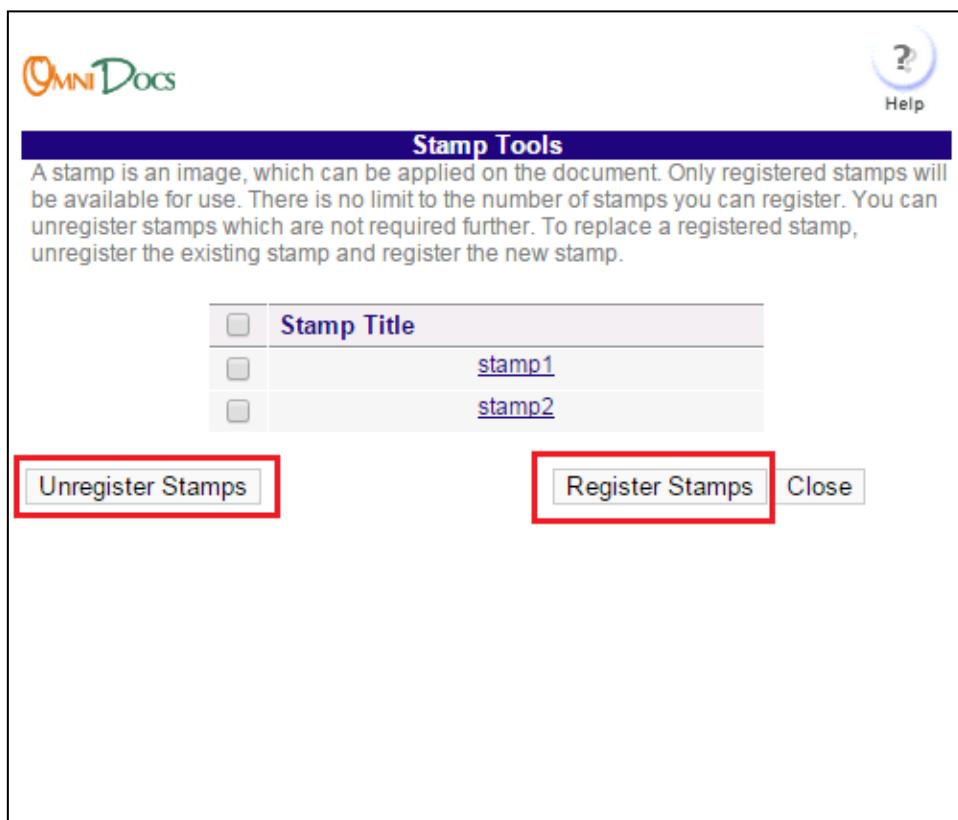


Figure: 3.52

4. Click the **Choose File** button to select the image file from the hard disk to register and write the Stamp title in the respective textbox. Click the **Save** button to complete the registration process or click **Cancel** to exit without saving the stamp.

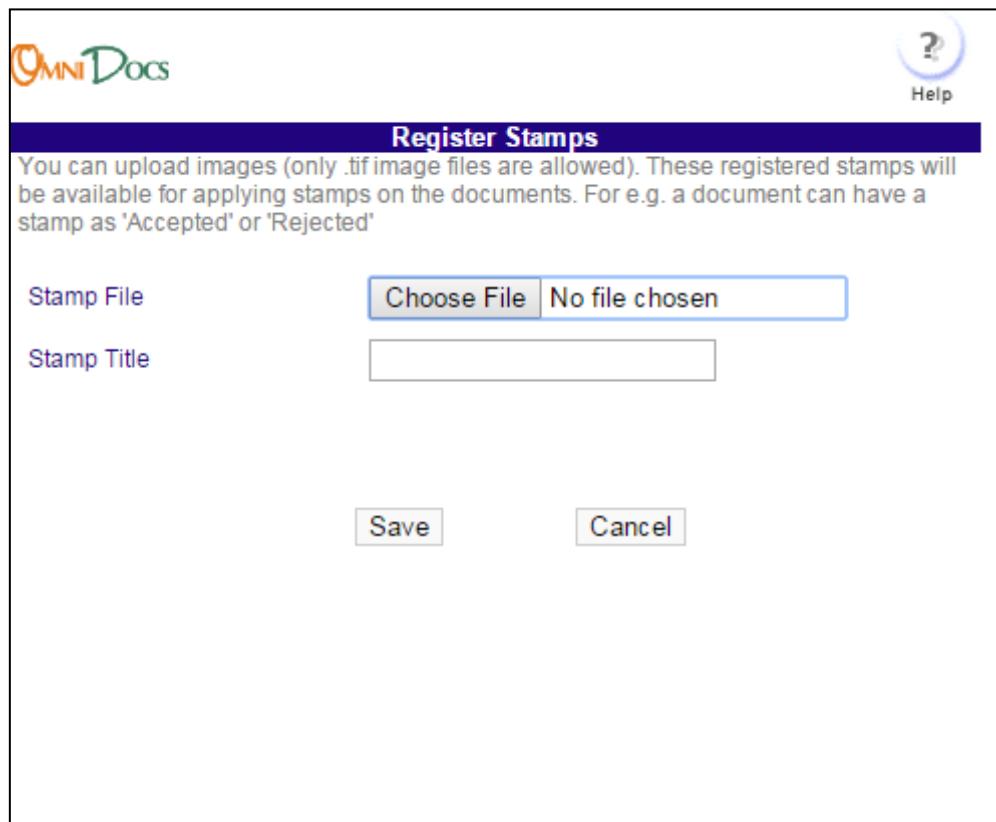


Figure: 3.53

NOTE:

Only .tif files are allowed to be registered for stamping in the document.

5. Click the **Close** button to return back to the home page of the Admin application of OmniDocs.

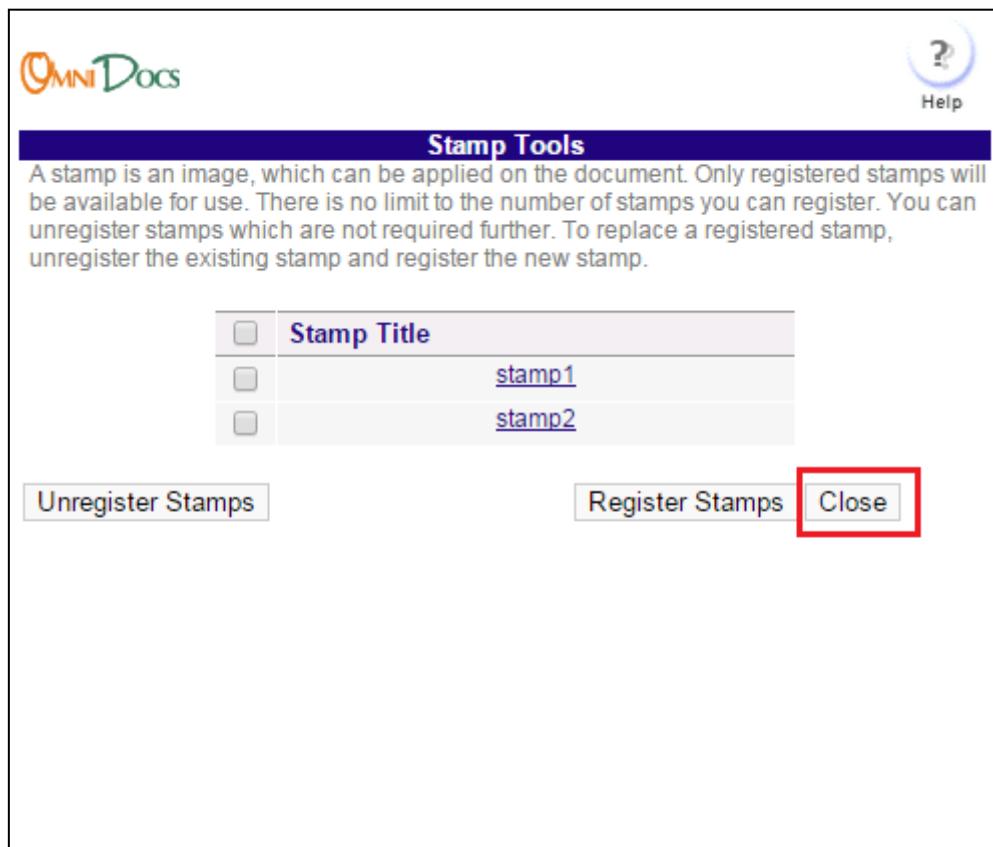


Figure: 3.54

6. To unregister a stamp, select the check box in front of the stamp you want to remove and click the **Unregister Stamps** button. The unregistered stamps are not available for applying to the document.

Applying registered stamps on an image document:

1. Click the image document to open on which you want to apply stamp in the OmniDocs Web Desktop application.

Document Viewing – OpAll Viewer

The screenshot shows the OmniDocs OpAll Viewer interface. At the top, there's a header bar with tabs for 'OD Web Desktop' and 'MasterDesktop', and a message 'Hi Supervisor2, Welcome to seq_28apr'. The date 'Last Login Time 04/05/2016 16:55' is also displayed. On the right side of the header are links for 'Alarms | Options | Help | Logout'.

The main area has a 'Repository' sidebar on the left containing 'Folder(s)' and 'spanish'. The main content area displays a table titled 'seq_28apr/spanish' with columns: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. A row for 'Scantest_2' is selected and highlighted with a red border. The table contains 11 rows of data.

At the bottom of the interface, there are search and reporting tools labeled 'Search', 'OmniProcess', and 'Reports'. The footer contains the copyright notice 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 3.55

2. Click the Stamp button in the vertical tool bar to enable the stamp available dialog box for selecting the stamp to be applied to the image document.

The screenshot shows the OmniDocs document editing interface. On the left, there's a sidebar with 'Data View' and 'Thumbnail View' tabs. Under 'General', it shows 'Introducer's Details' including owner 'Supervisor2', type 'tif', size '149 KB', modified '14/07/2015 19:17', and keywords 'None'. There's also a link 'View Linked Documents'.

The main panel has a toolbar at the top with various icons. Below the toolbar, there's a section titled 'Criteria for filing' with a table:

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

Below this, there's a section titled 'Form PF is broken into four sections:' with another table:

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
Image Stamp	20	Private equity fund details

At the bottom of the interface, there are navigation buttons for 'New', '< Prev / Next >', and 'Note Sheet'.

Figure: 3.56

3. Click the drop-down arrow to select the stamp to be applied to the document and click the **OK** button.

Document Viewing – OpAll Viewer

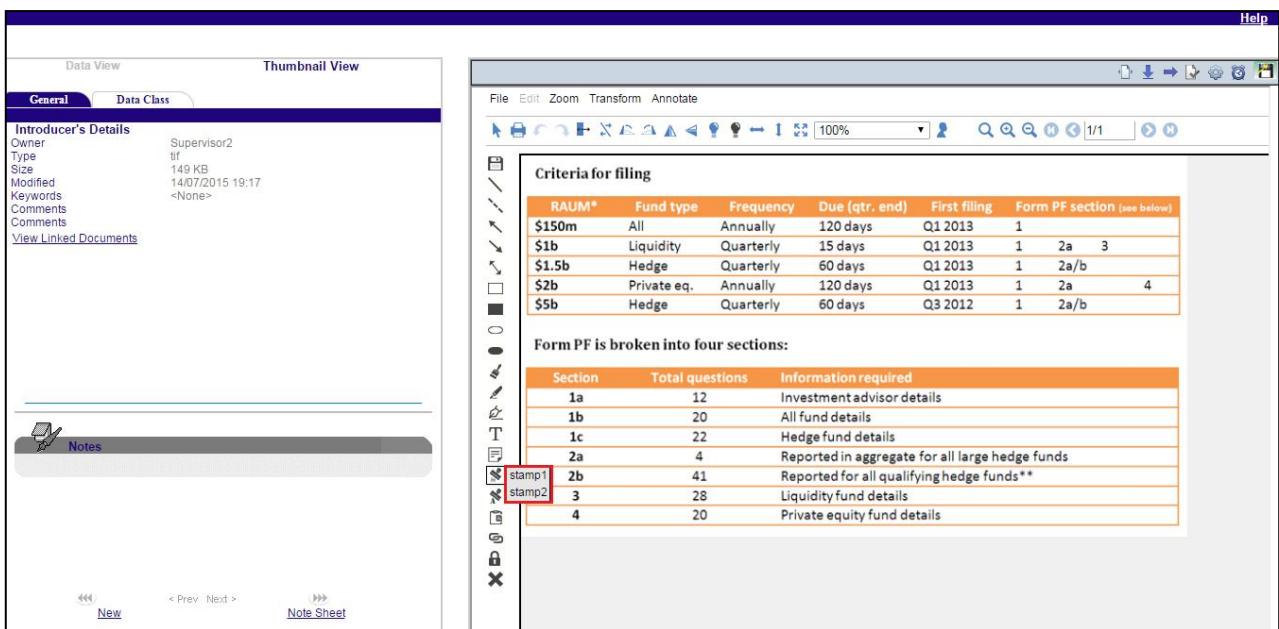


Figure: 3.57

4. The selected stamp is visible on the document and click the **Save** button to save the stamp on the image document.

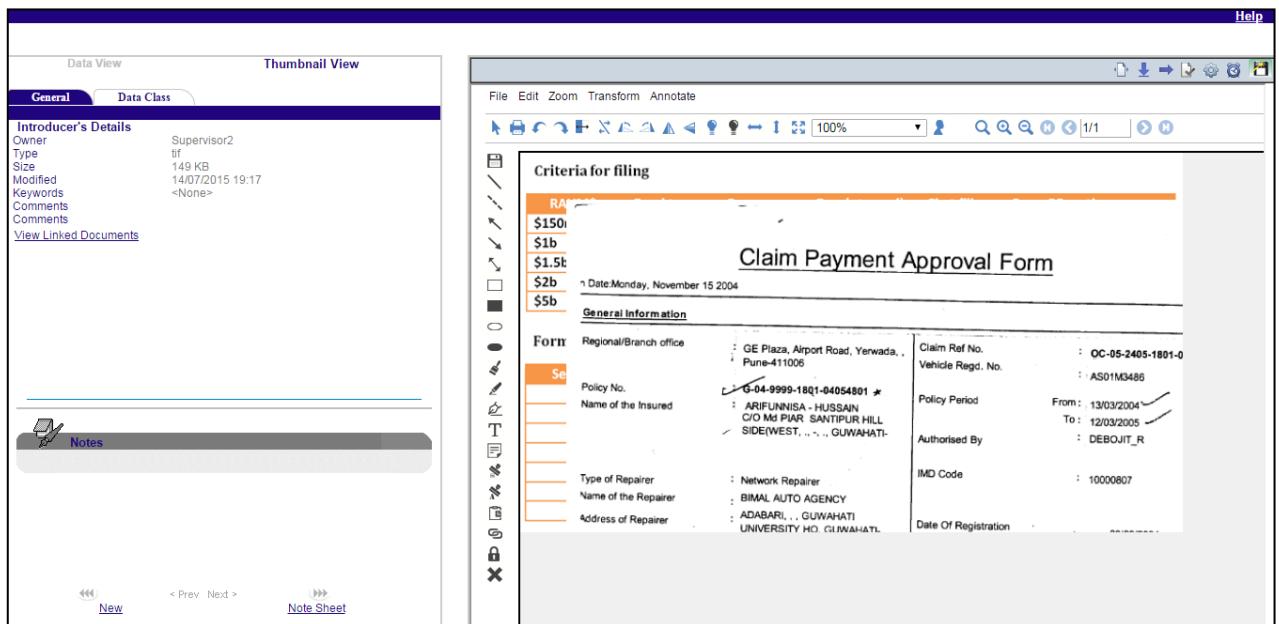


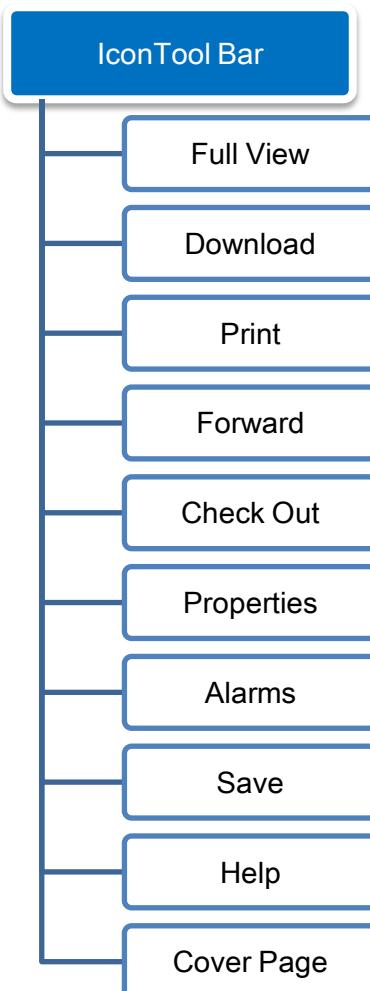
Figure: 3.58

NOTE:

Text stamps can also be applied to the image document by executing the same sequence of above steps.

3.1.2 The Icon Toolbar

The screen has an icon toolbar as well. The icon toolbar consists of the following components:



1. Full View:

- Click the **Full View** button in the icon tool bar.

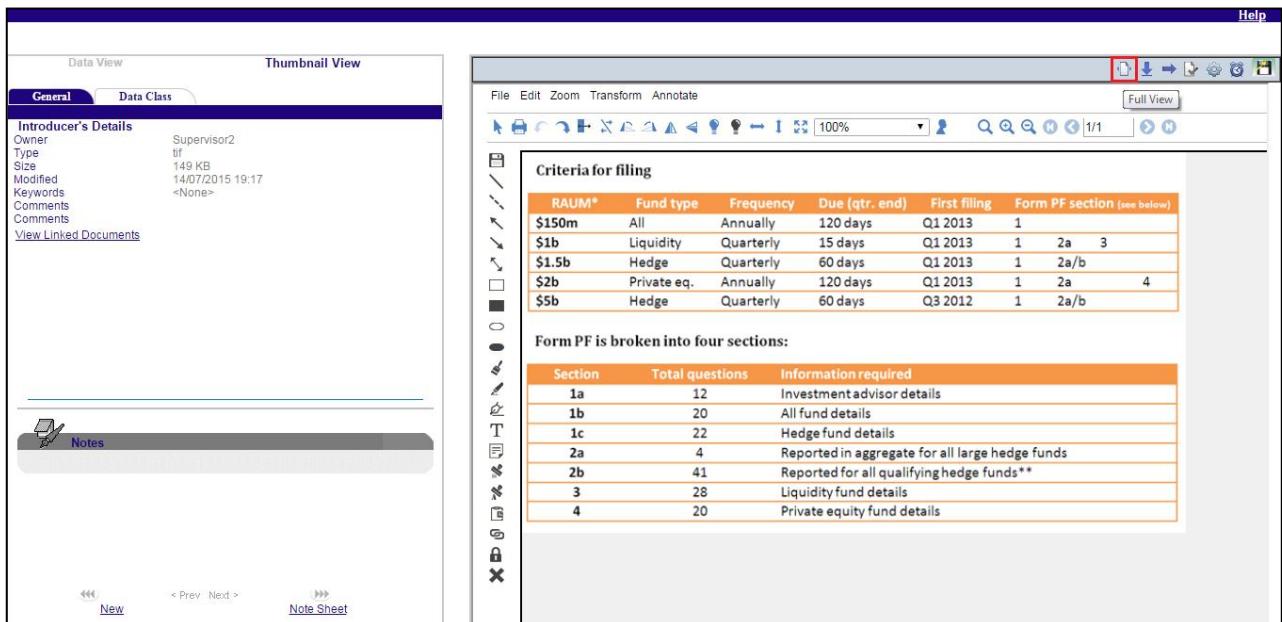


Figure: 3.59

- Full View** Displays the document in full view. Full View of the document is shown in the following screen.

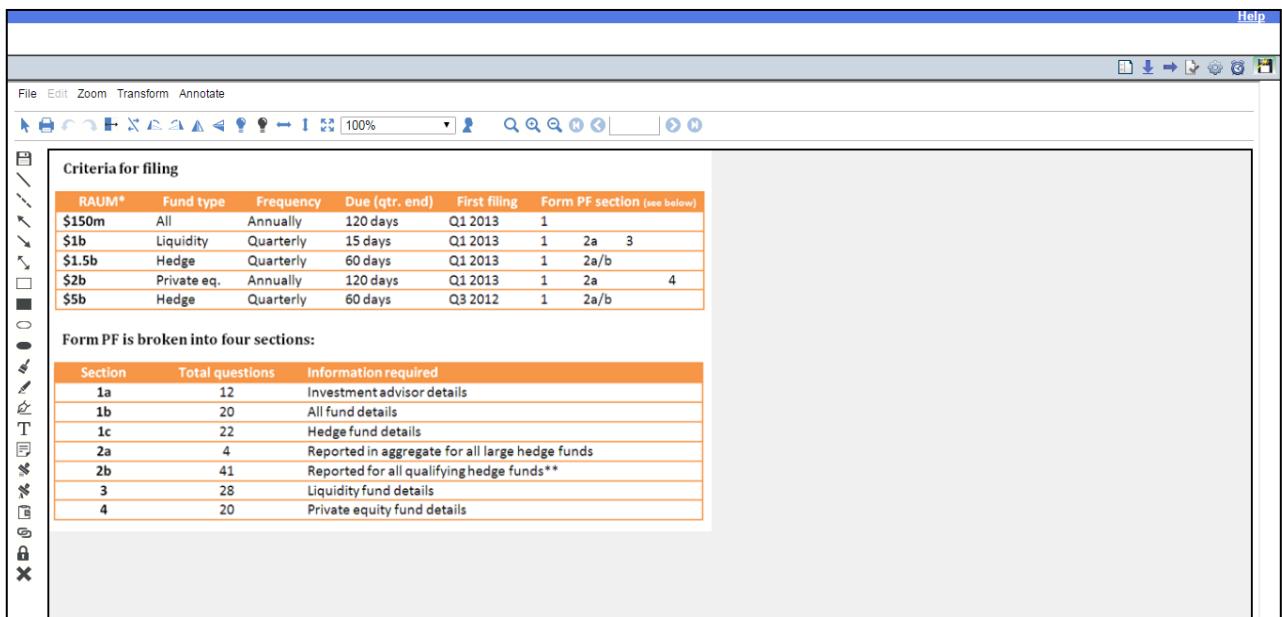


Figure: 3.60

2. **Thumbnail View:** Displays the document along with its thumbnail image in the left frame of the screen.

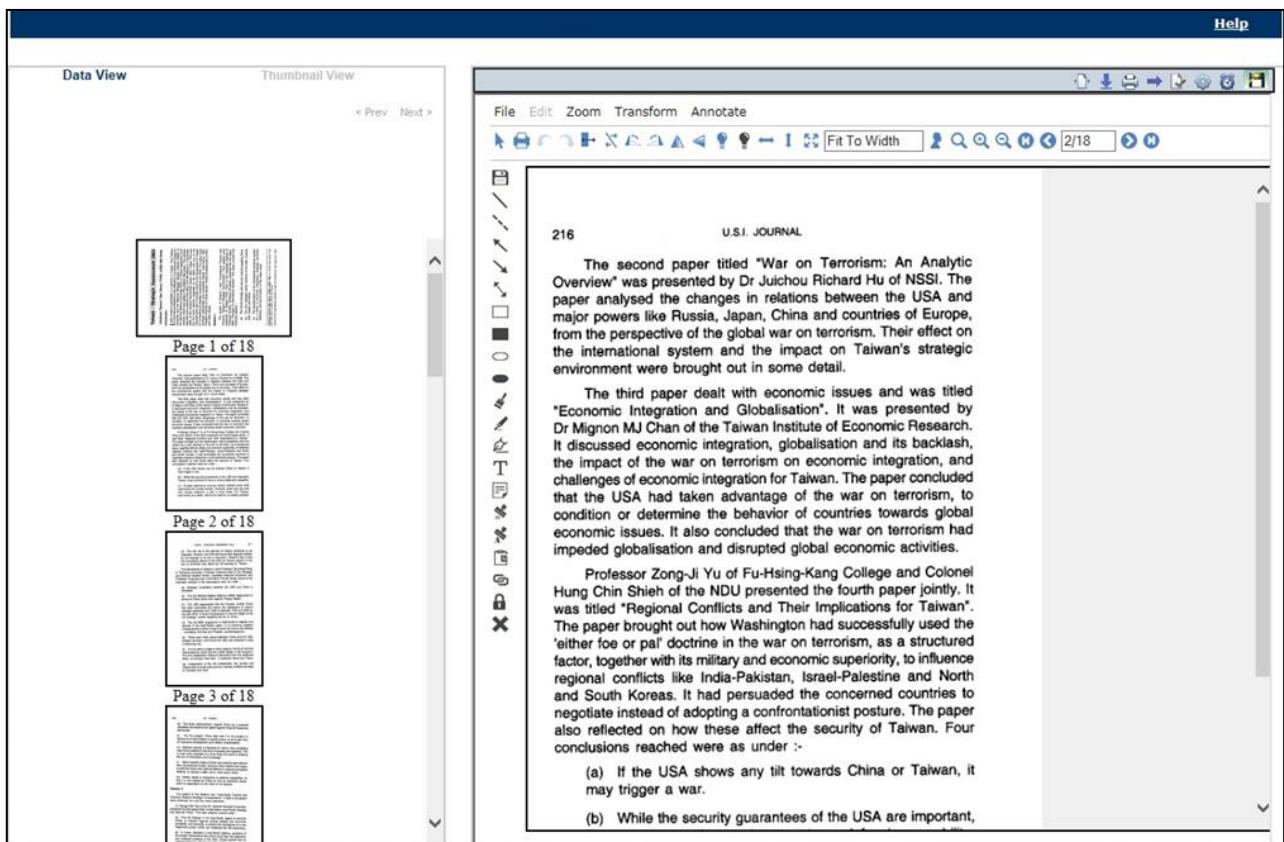


Figure: 3.61

3. **Data View Display:** Displays the document along with its general properties and associated notes in the left frame of the screen.

Document Viewing – OpAll Viewer

The screenshot shows the OpAll Viewer interface. On the left, there's a sidebar with 'Data View' and 'Thumbnail View' tabs, and sections for 'General' and 'Data Class'. Under 'General', it shows 'Introducer's Details1' with fields like Owner (Supervisor), Type (tif), Size (149 KB), Modified (15/07/2015 05:48), and Keywords ('<None>'). Below this is a 'View Linked Documents' link. A 'Notes' section contains a note from 'Supervisor' dated 15/07/2015 05:48 stating 'This document should be approved.' At the bottom of the sidebar are buttons for 'New', '<<', 'Secure', '< Prev', 'Next >', and 'Note Sheet'.

The main area has a toolbar with various icons. The menu bar includes File, Edit, Zoom, Transform, Annotate, and Help. A status bar at the bottom right shows '100%', '1/1', and other icons. The central content area displays 'Criteria for filing' with a table:

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a 4
\$5b	Hedge	Quarterly	60 days	Q3 2012	1 2a/b

Below this, a note states 'Form PF is broken into four sections:' followed by another table:

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

Figure: 3.62

4. Download:

- Download button downloads the document directly. Click the **Download** button.
- The File Download dialog box appears as shown below.

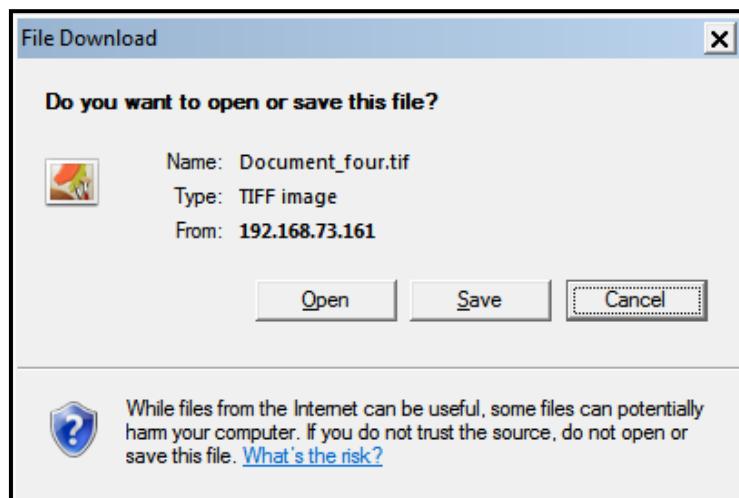


Figure: 3.63

- You can open the file directly from the current location, by selecting the concerned option; the file is opened in its native application. If native application is not installed

on the system, then Open With dialog box is invoked to launch the document in the application selected by the user.

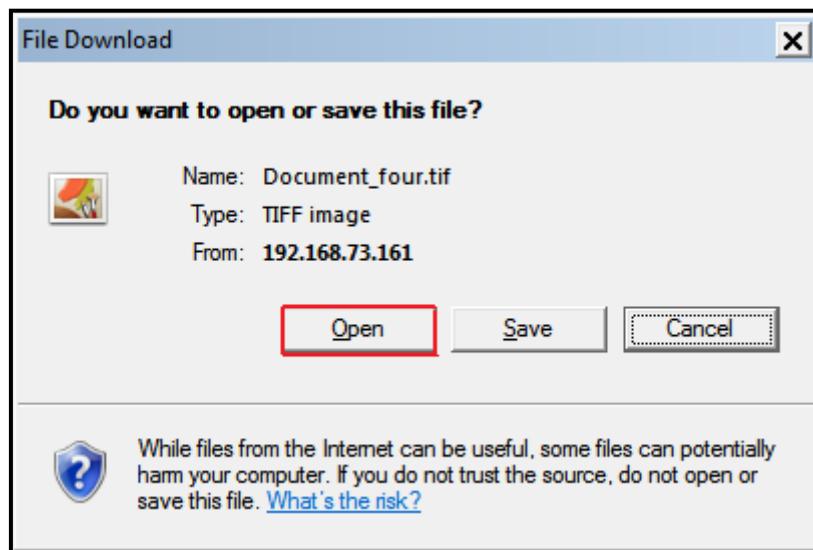


Figure: 3.64

- d) Click **Cancel** command button to close the File Download screen without saving the changes made.

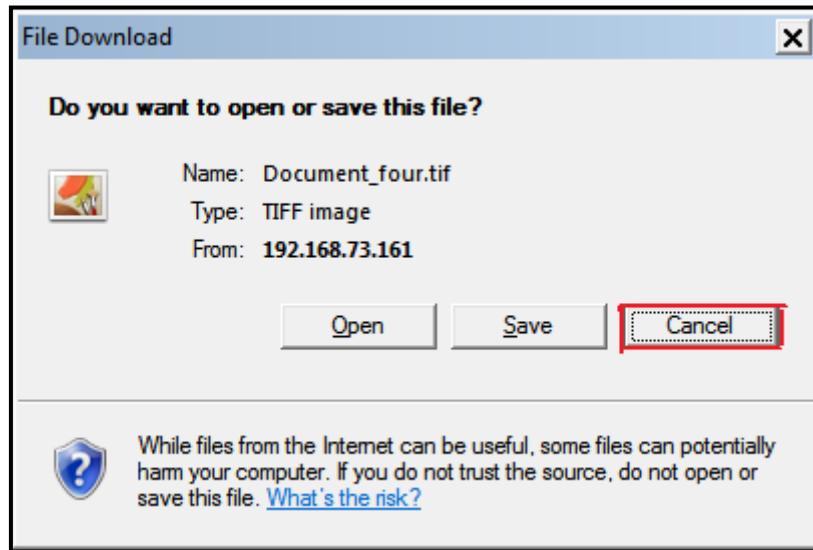


Figure: 3.65

- e) You can save the selected file into the hard disk by clicking the concerned option.

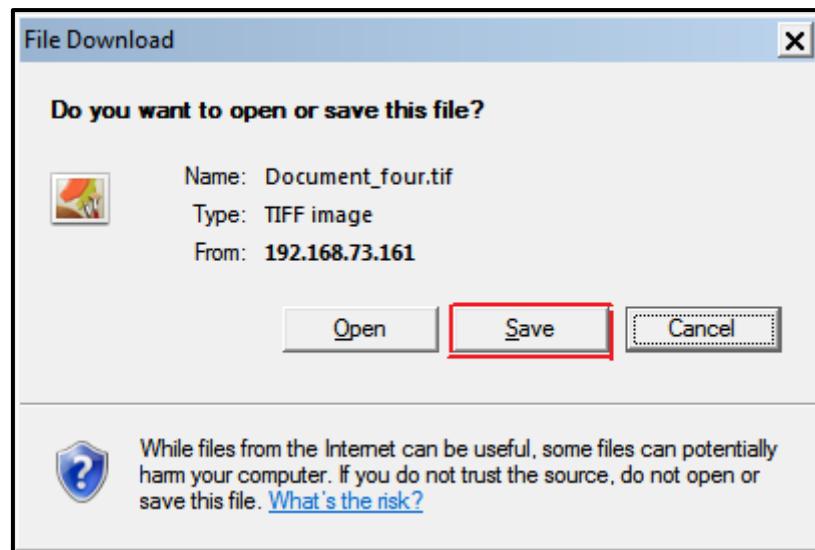


Figure: 3.66

- f) The Save As dialog box appears.

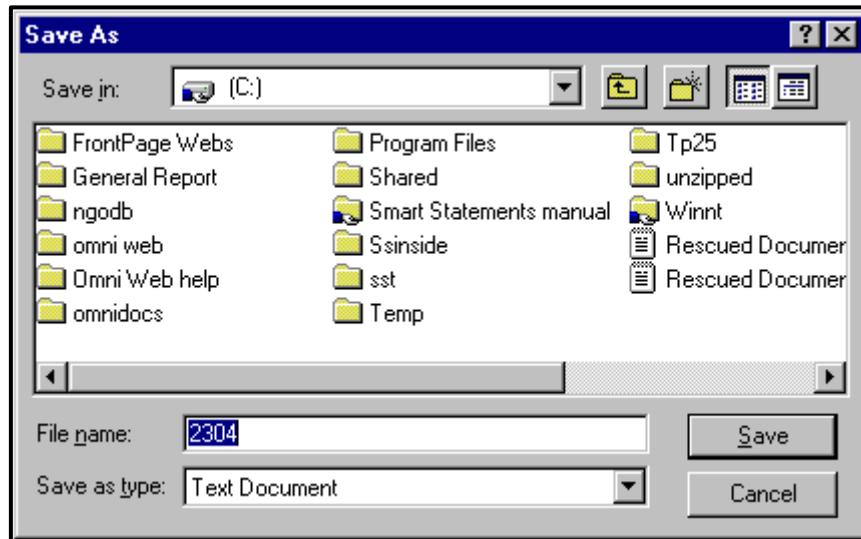


Figure: 3.67

- g) Select the path where you want to save the file from the Save in combo box. The list of all the files of the selected path is displayed. Specify the File Name of the selected file in the File Name textbox.

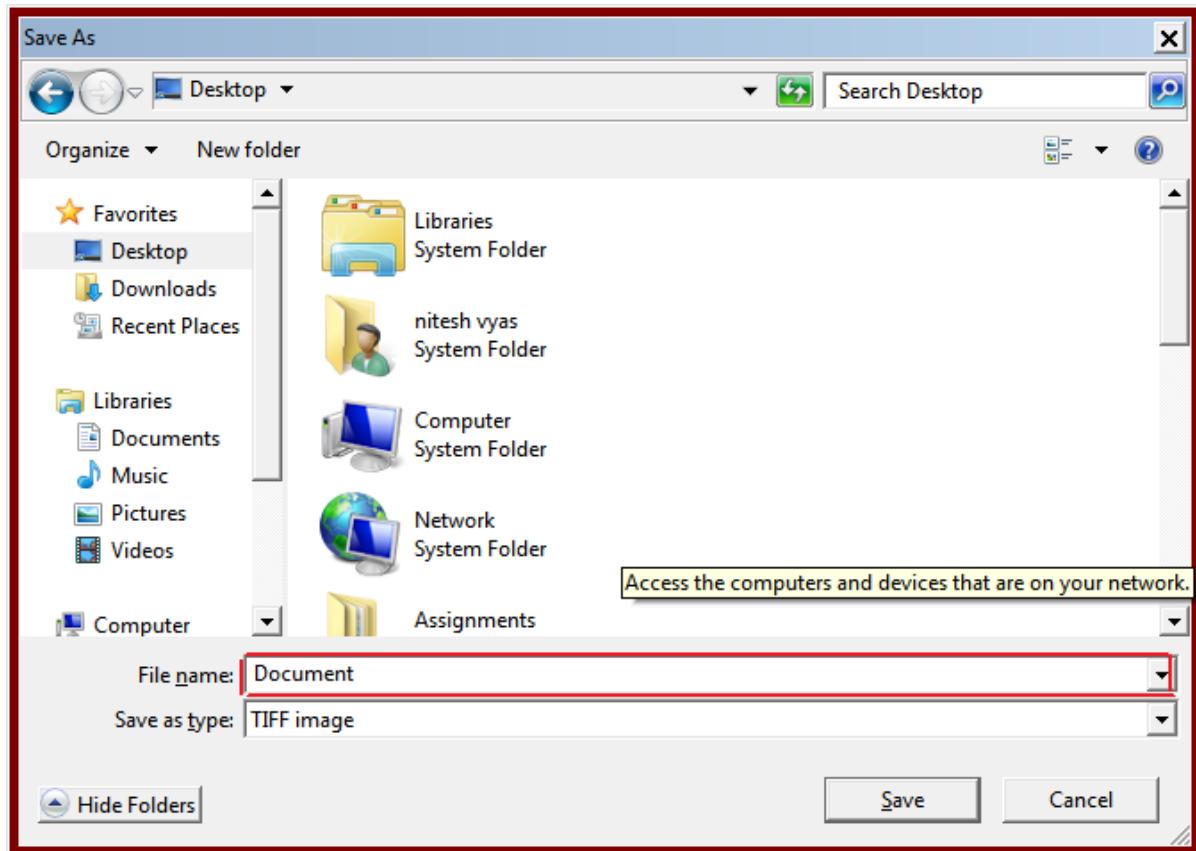


Figure: 3.68

- h) Select the Type of the file to be saved as from the Save As Type combo box. Click **Save** to save the changes made. Click **Cancel** to close the Save As dialog box without saving the changes made.

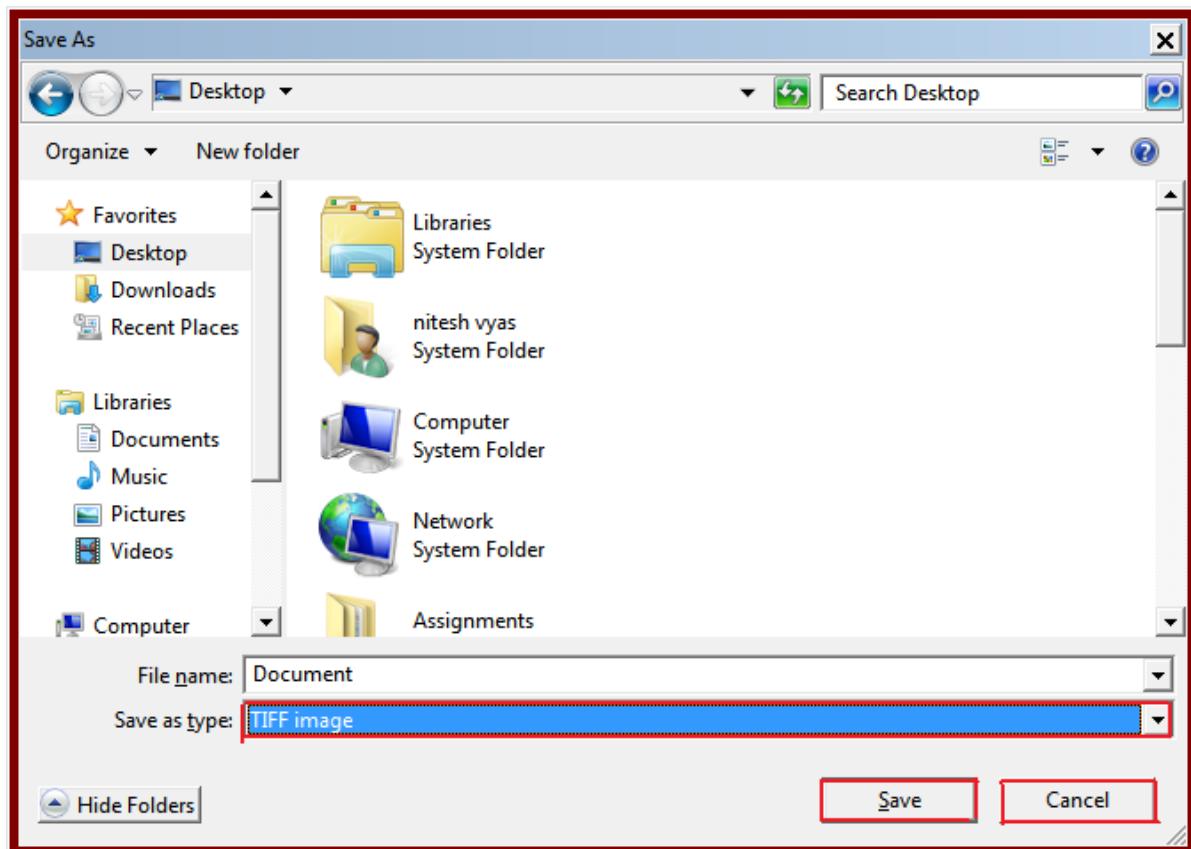


Figure: 3.69

5. Properties

- a) Document Properties button Invokes the **Document Properties** screen.

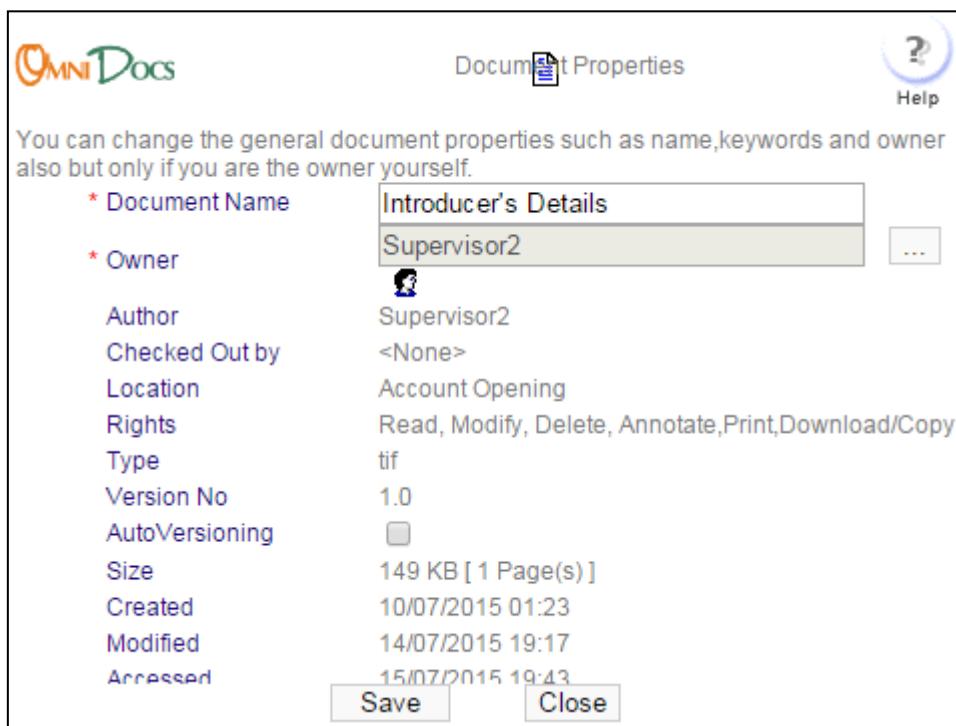


Figure: 3.70

Forward:

- a) Forward Document allows in mailing the selected document to another person.
Forward button pops-up the following screen.

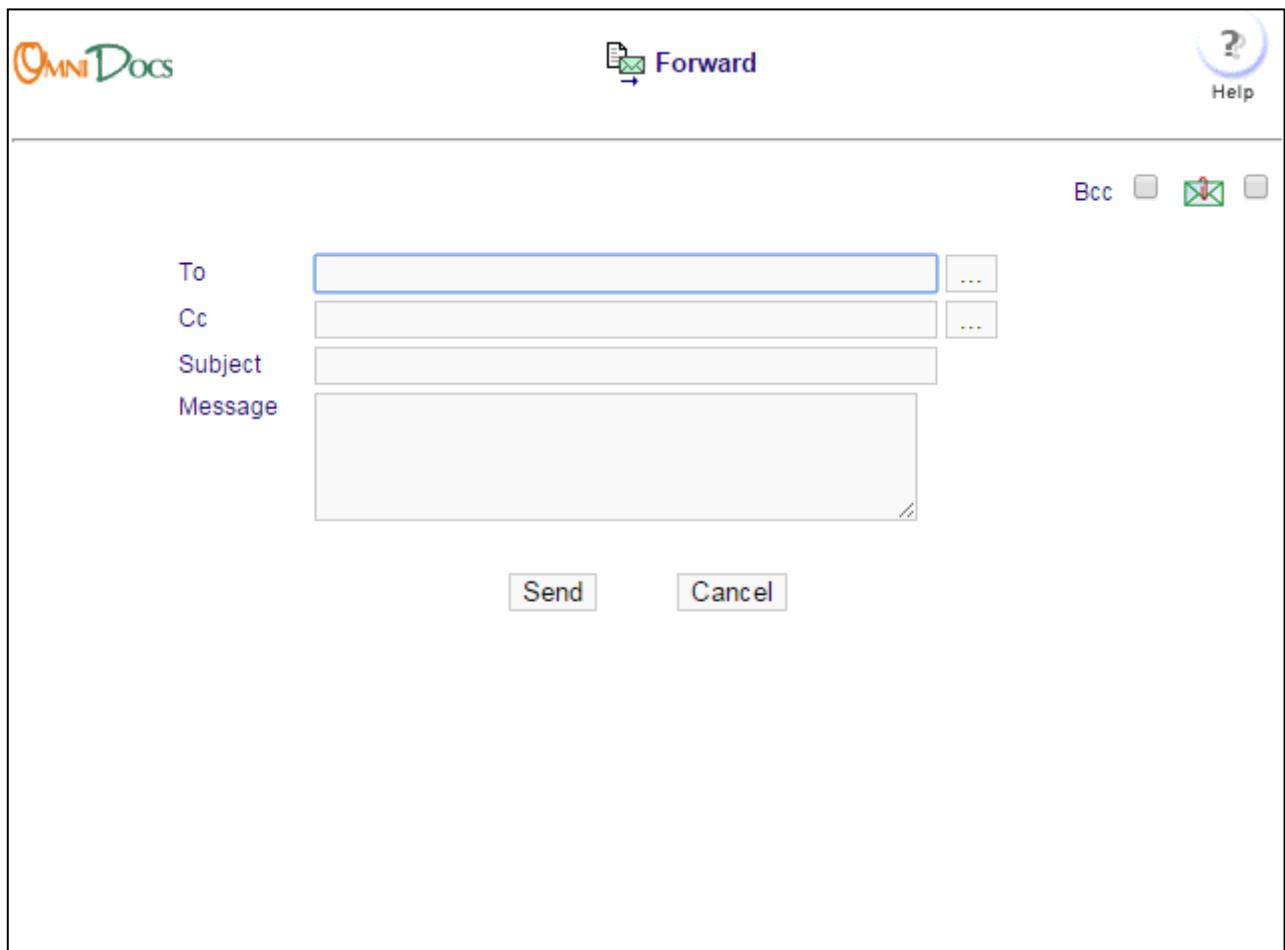


Figure: 3.71

View Linked Documents: Displays the number of documents linked with the current document.

The Linked Document displays information, such as, name of the document, type of the document, owner of the document, and modified date.

To view the linked document follow the following trace:

- Click the View Linked Documents option.

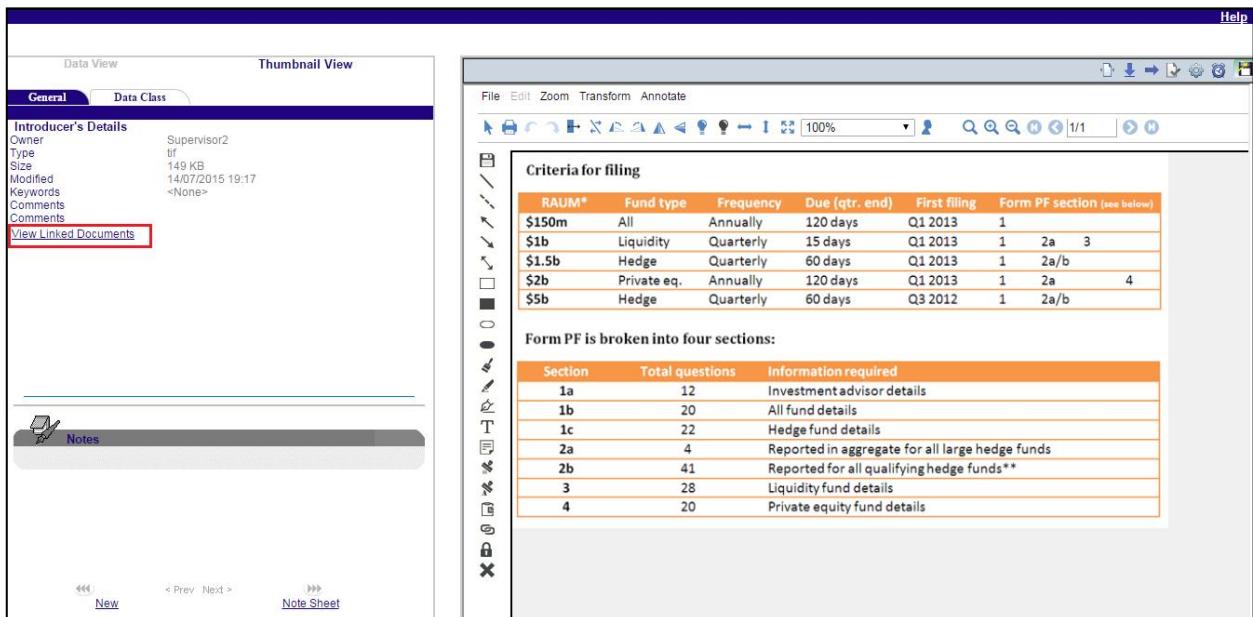


Figure: 3.72

- The Linked Document screen is invoked. To view the document in the document viewer, click the required document

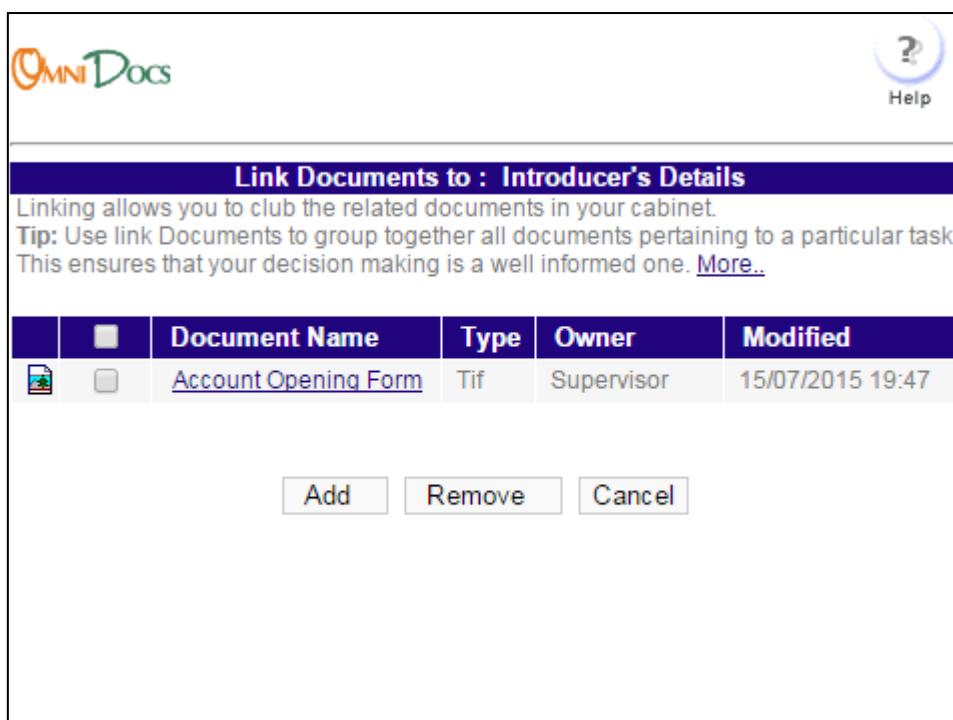


Figure: 3.73

To de-link the selected document, follow the following trace:

- a) Click the **Remove** button.

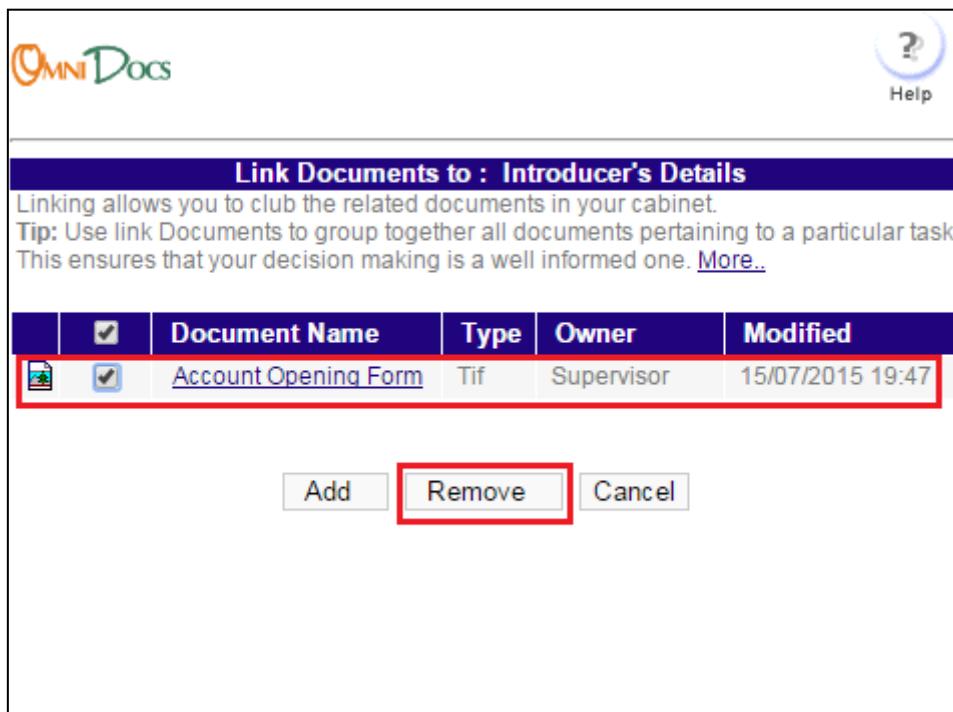


Figure: 3.74

- b) After delinking, the delinked document is removed from the list of linked documents.

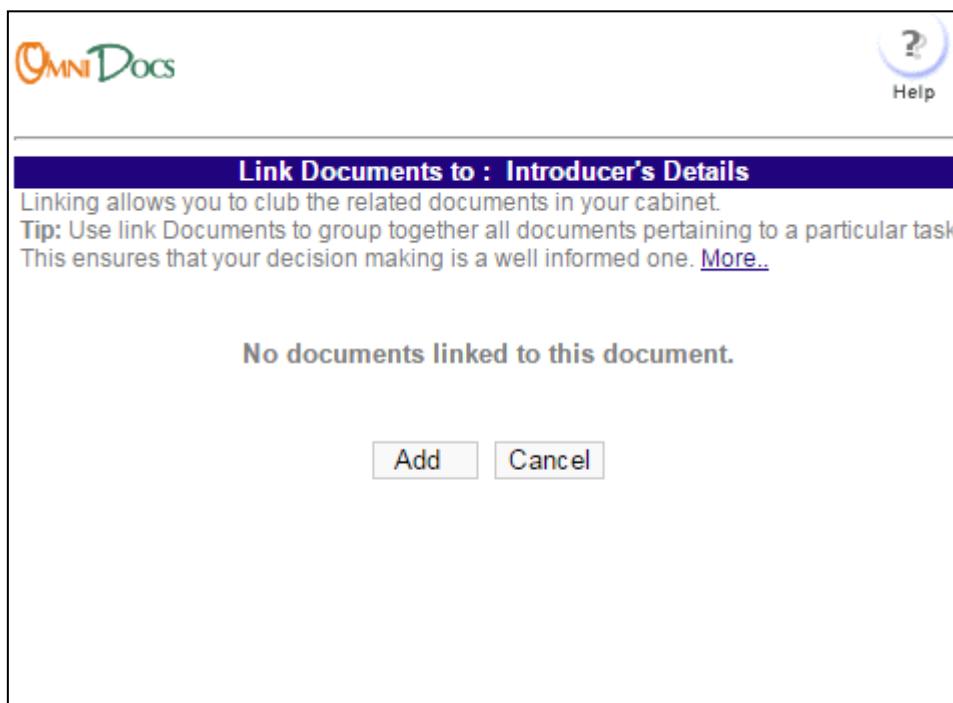


Figure: 3.75

- c) To close the Linked Document screen click **Cancel**.

6. Check Out

Check Out button Invokes the checkout dialog box to check out the document.

To check out a document follow the following trace:

- a) Click the **Check Out** option.

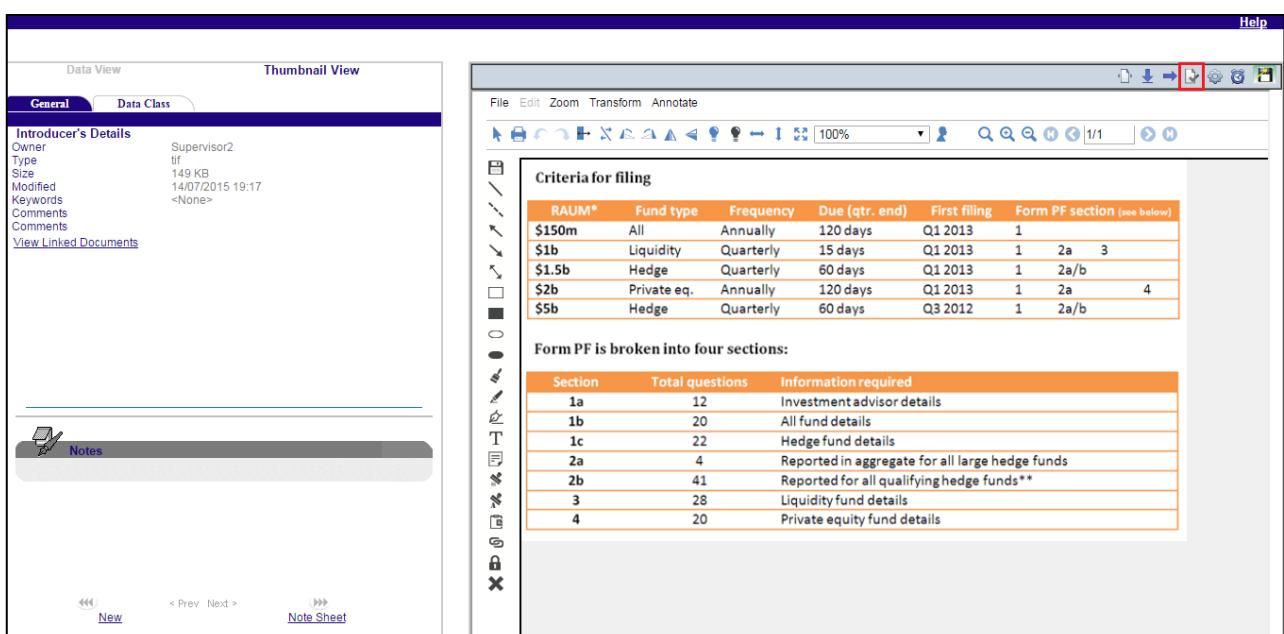


Figure: 3.76

- b) The message box is displayed as shown, to checkout a document, click the **OK** button, and else click on **Cancel**.

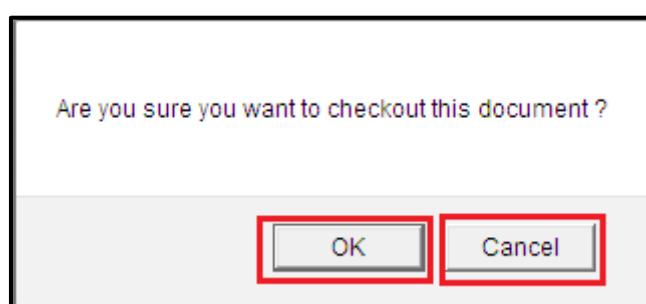


Figure: 3.77

- c) After clicking **OK** button, the Check Out screen pops-up. To close the Check Out Document screen: Click **Close**.

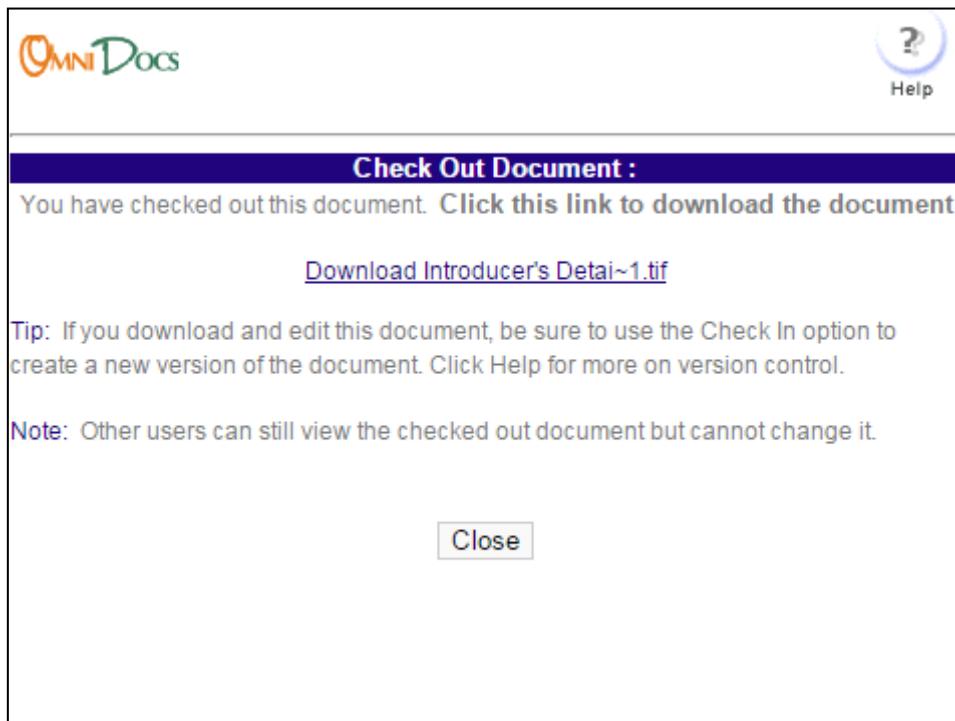


Figure: 3.78

7. **Alarms:**

Alarms/Reminders invoke the reminder screen to set the reminder for any user of the cabinet.

- a) To set the alarms, Click **Alarms** button.

Document Viewing – OpAll Viewer

The screenshot shows the OpAll Viewer interface. On the left, there's a sidebar with tabs for 'Data View' and 'Thumbnail View'. Under 'General', it lists 'Introducer's Details' including Owner (Supervisor2), Type (tif), Size (149 KB), Modified (15/07/2015 19:50), and Keywords (None). Below this is a link to 'View Linked Documents'. A 'Notes' section is present at the bottom of the sidebar. The main area displays 'Criteria for filing' with a table:

RAUM*	Fund type	Frequency	Due (qtr. end)	First filing	Form PF section (see below)
\$150m	All	Annually	120 days	Q1 2013	1
\$1b	Liquidity	Quarterly	15 days	Q1 2013	1 2a 3
\$1.5b	Hedge	Quarterly	60 days	Q1 2013	1 2a/b
\$2b	Private eq.	Annually	120 days	Q1 2013	1 2a
\$5b	Hedge	Quarterly	60 days	Q3 2012	4

Below the table, it says 'Form PF is broken into four sections:' with another table:

Section	Total questions	Information required
1a	12	Investment advisor details
1b	20	All fund details
1c	22	Hedge fund details
2a	4	Reported in aggregate for all large hedge funds
2b	41	Reported for all qualifying hedge funds**
3	28	Liquidity fund details
4	20	Private equity fund details

At the bottom of the main area, there are navigation links: < Prev / Next >, Note Sheet, and Help.

Figure: 3.79

b) The reminder screen appears as shown:

The screenshot shows the OmniDocs 'Alarms / Reminders' screen. At the top, there are tabs for 'Alarms' and 'Reminders', with 'Alarms' selected. A message explains what an alarm is and provides a tip. Below this, there are fields for 'Notify' (set to 'No User') and 'When' (set to 'Document Deleted'). There are also dropdown menus for selecting users and events. A 'Selected Alarms' list is empty. At the bottom, there are 'Ok' and 'Cancel' buttons.

Figure: 3.80

- c) Select the user from the **Notify** combo box for whom the reminder is to be set.

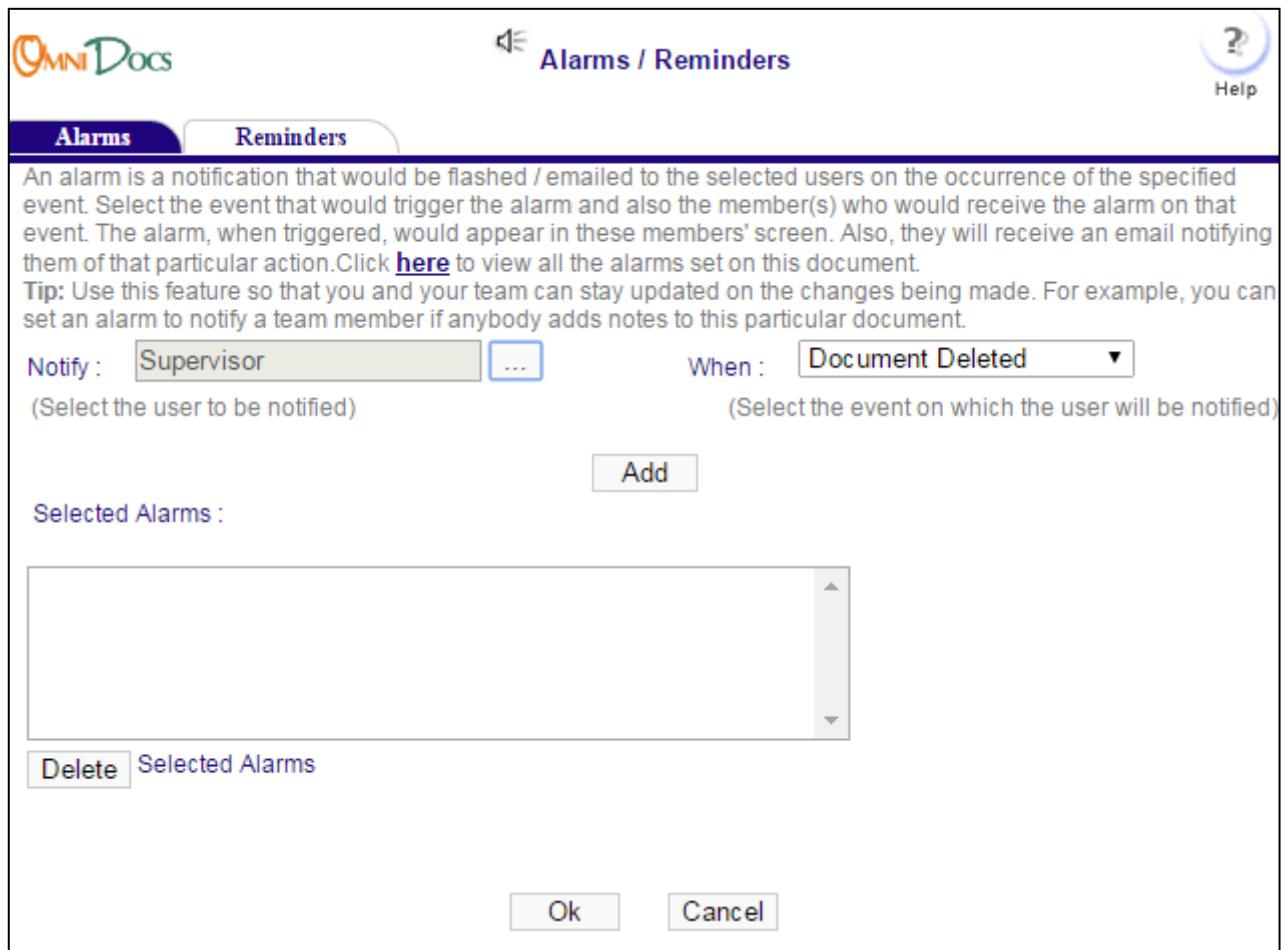


Figure: 3.81

- d) Select the event on which the user is to be notified from the When combo box.

Document Viewing – OpAll Viewer

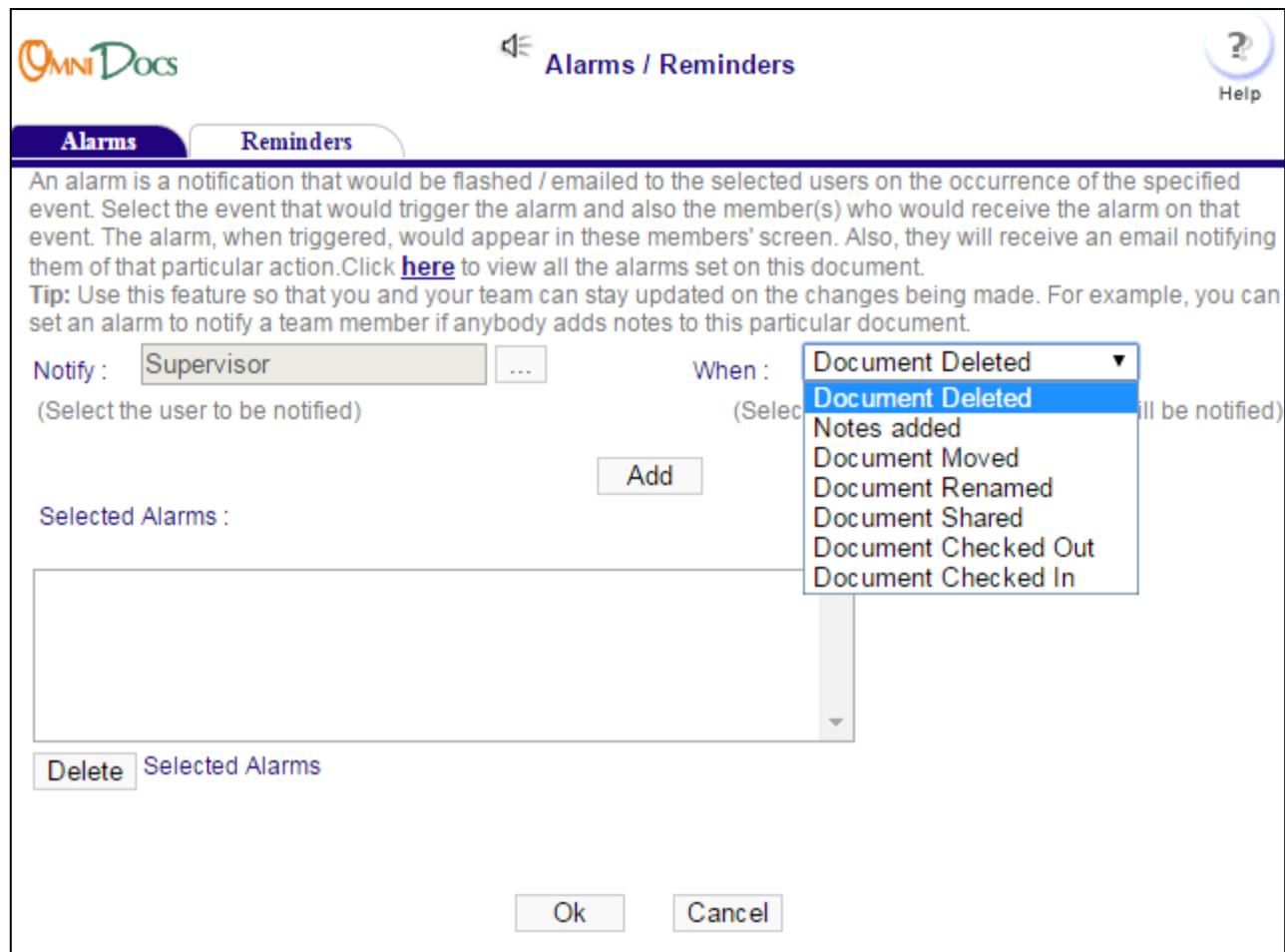


Figure: 3.82

- e) Click **Add** button to set the alarm. The following screen gets invoked:

Document Viewing – OpAll Viewer

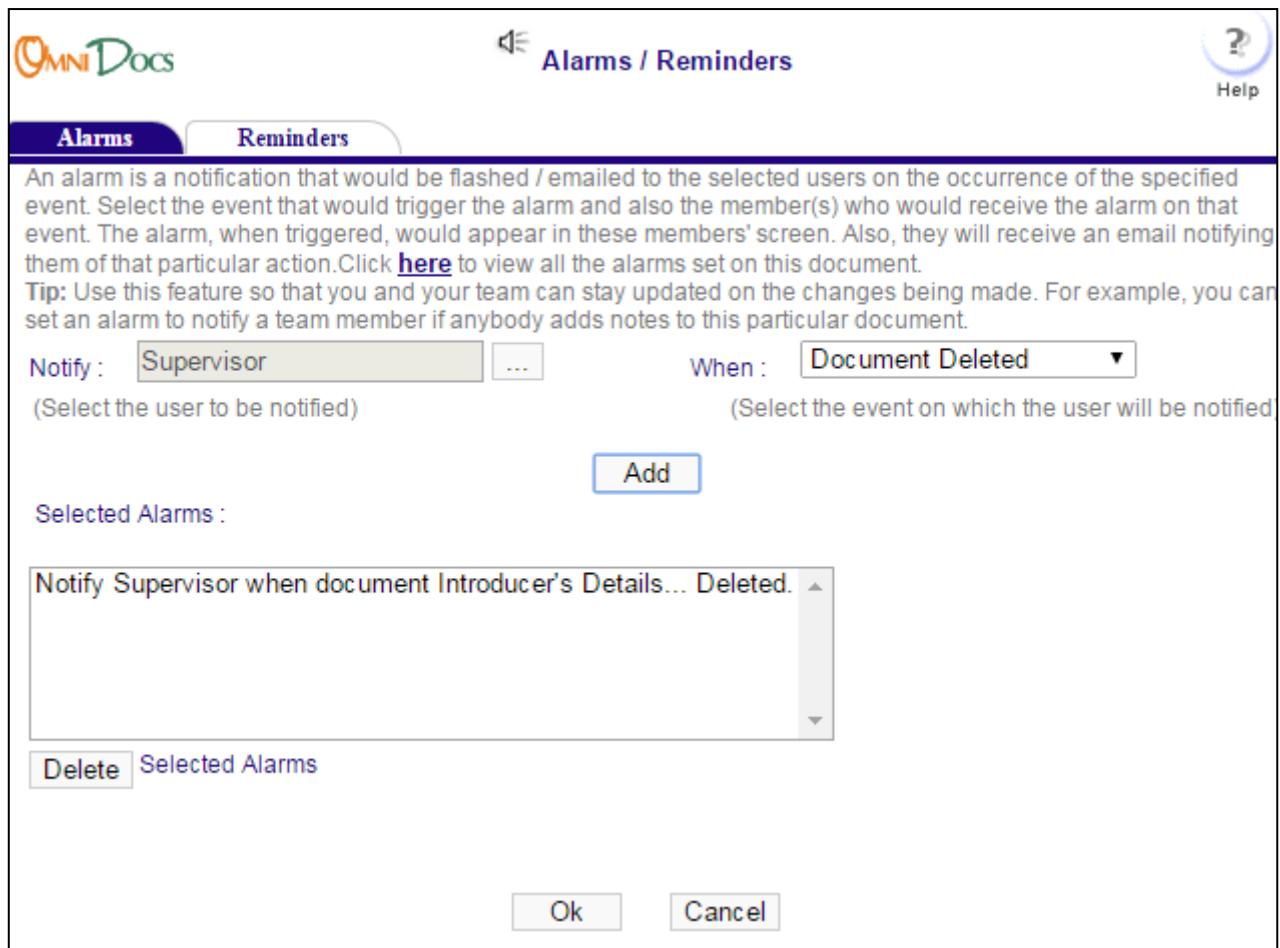


Figure: 3.83

- f) To delete an alarm, select an alarm from the list box and click **Delete** button.

Document Viewing – OpAll Viewer

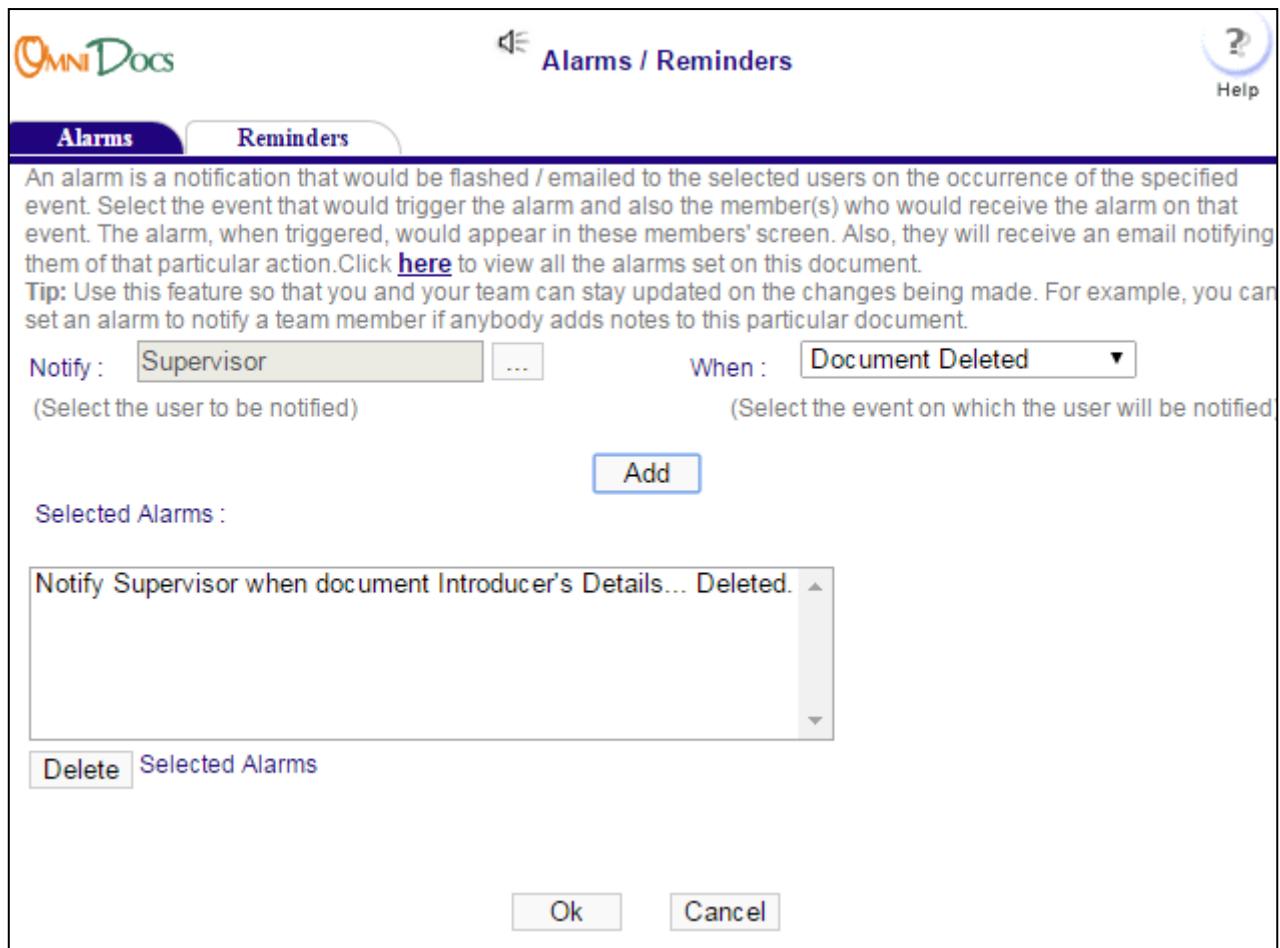


Figure: 3.84

- g) Click **OK** button to close the screen and save the changes, else click **Cancel** button to close the screen.

Document Viewing – OpAll Viewer

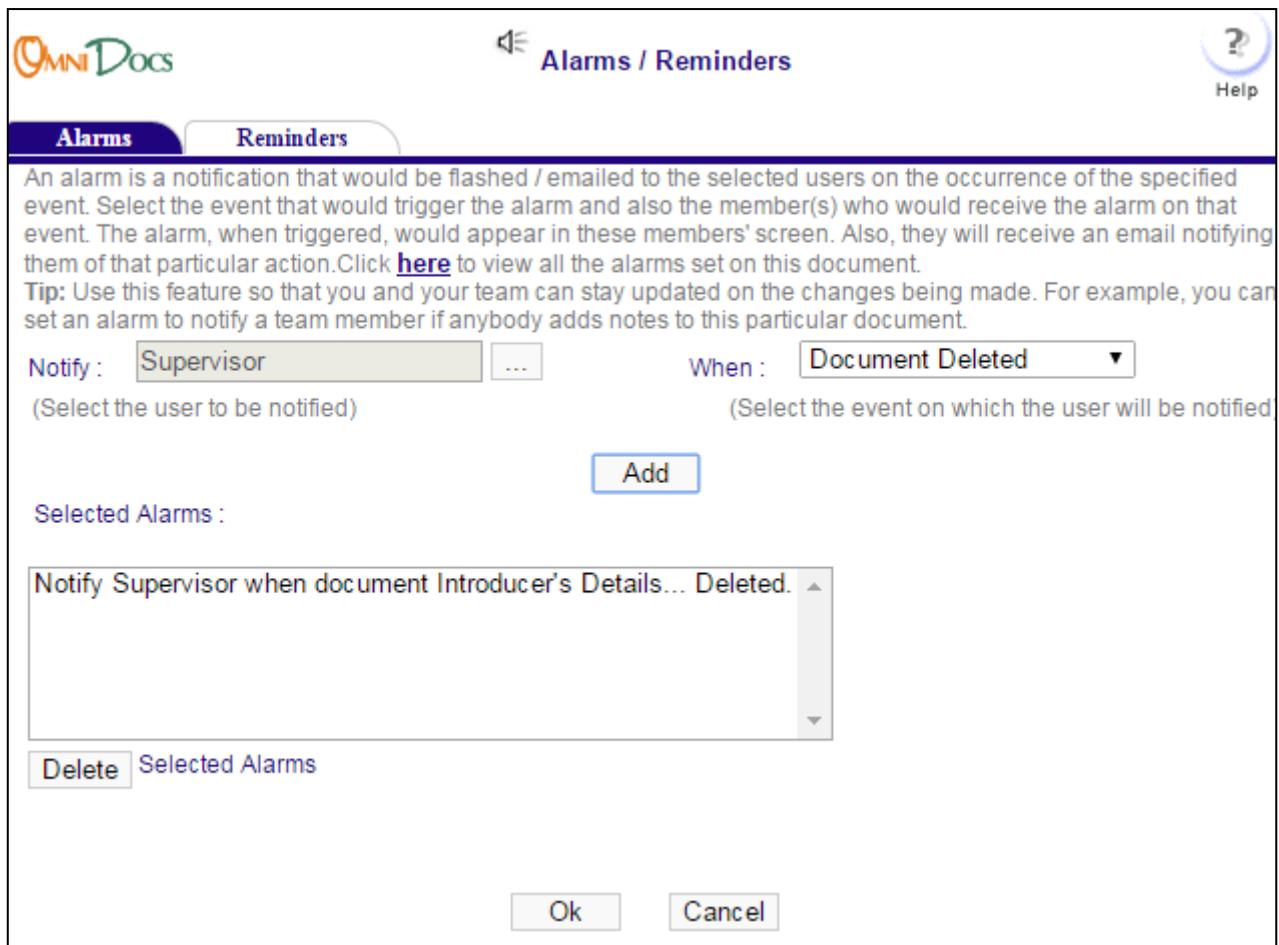


Figure: 3.85

8. Cover page:

- Icon Toolbar consists of Cover Page option to add annotations on these documents.

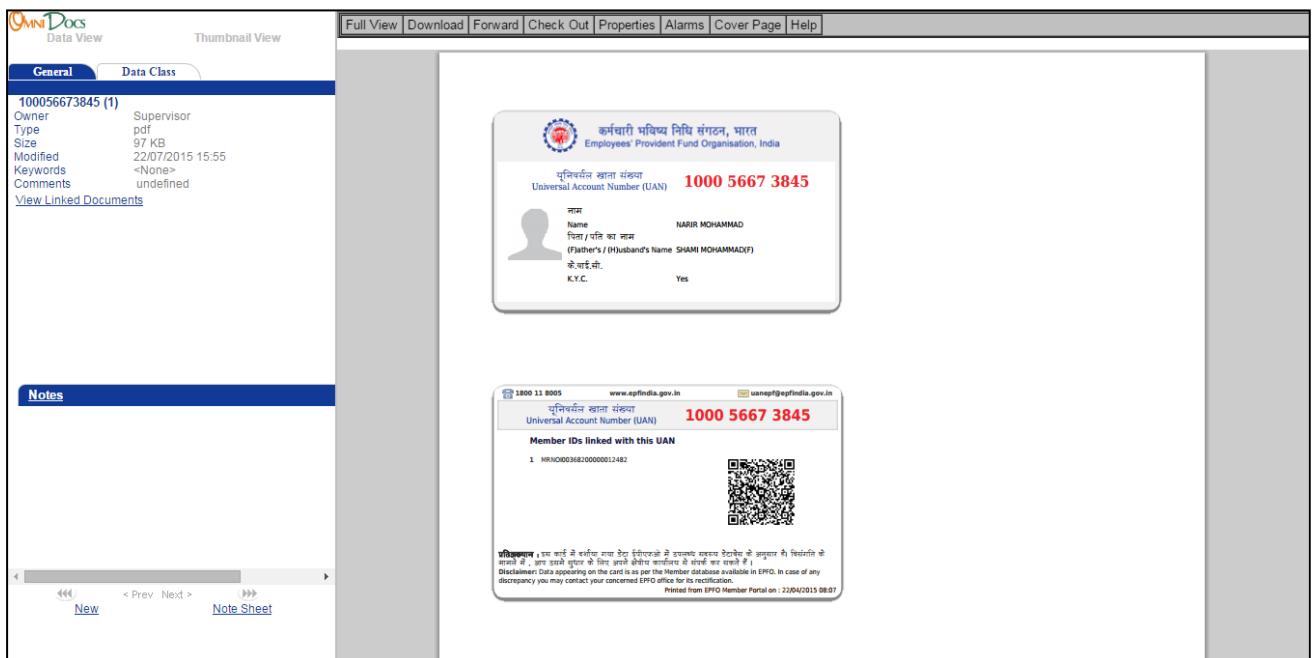


Figure: 3.86

- b) Click Cover page option provided in the icon tool bar. You can add annotations to any document.

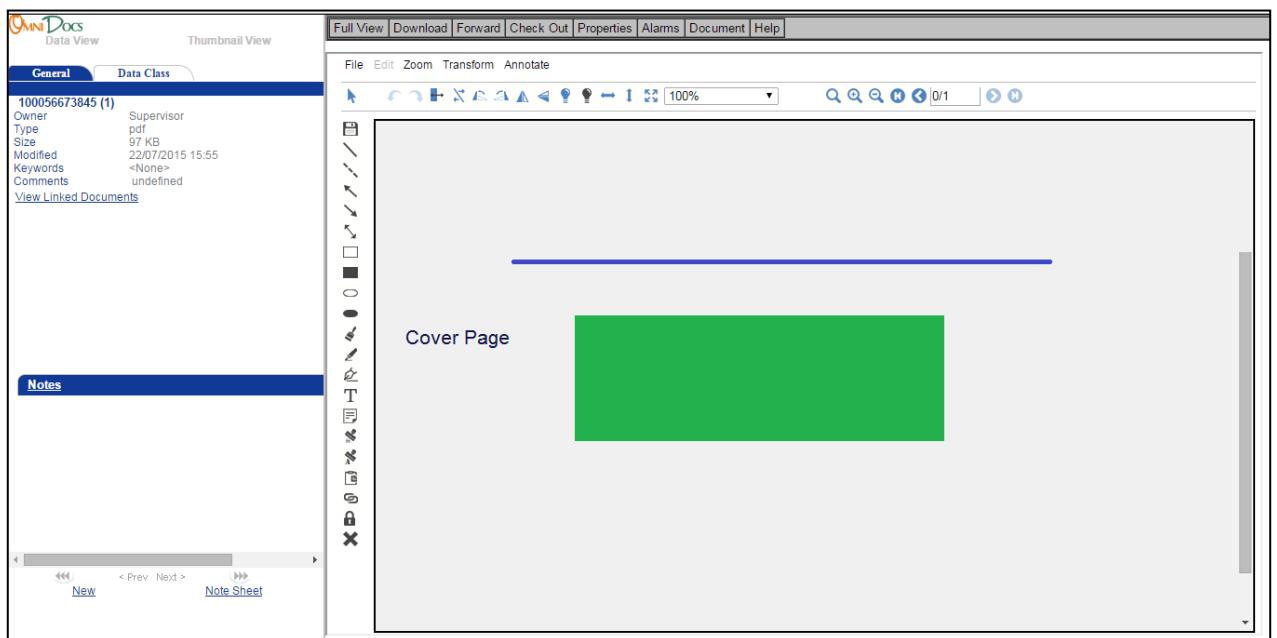


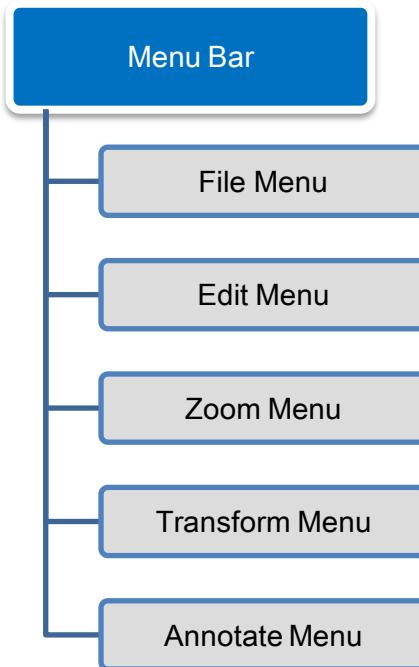
Figure: 3.87

9. Help:

- a) Help button invokes the help.

3.2 Menu Options

The Menu bar contains various menu items including support for editable annotations, which allow the user to apply various types of annotation. The various menu items are:



3.3 File Menu

Open File: Opens the document present in the local HDD(Hard Disk Drive).

Save: Saves the applied annotation on the document.

Print: Prints the annotation.

Properties: Displays the image properties.

The **File menu** is shown in the following screen.

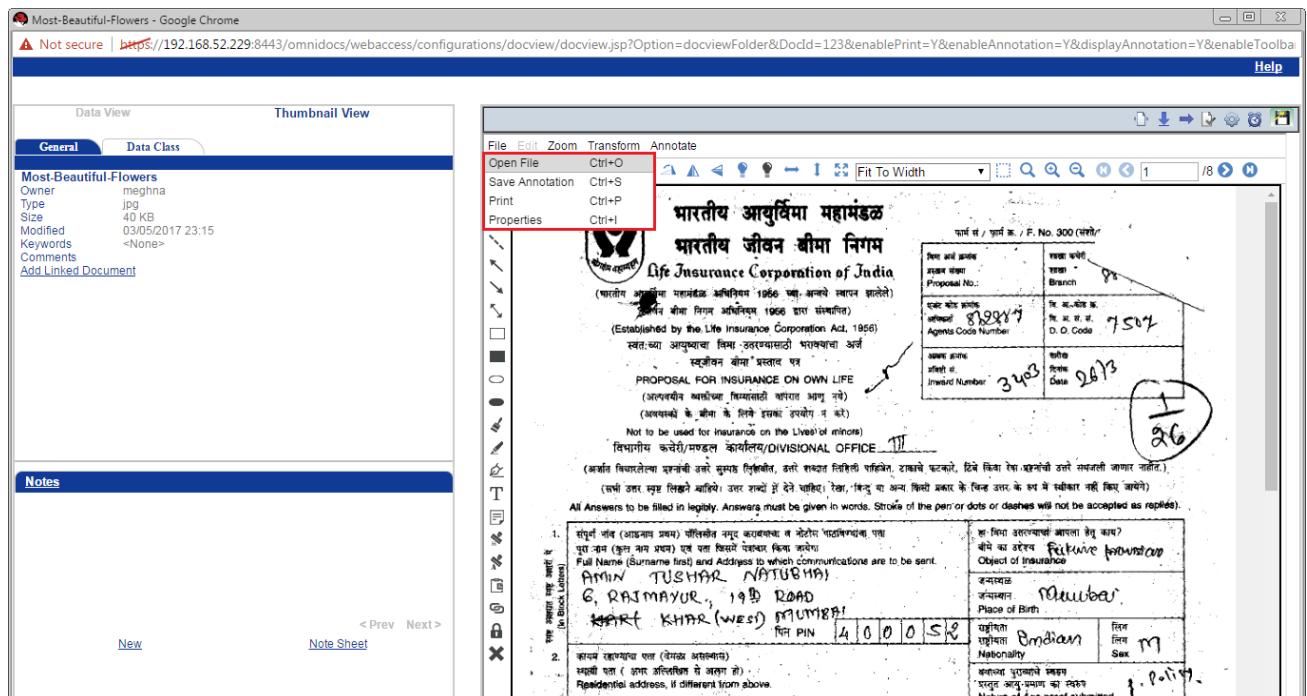


Figure: 3.88

3.3.1 Open File

To Open any document present in the local system or HDD(Hard Disk Drive).

1. Click **File menu**, and then click **Open File**.
2. **Open** dialog box appears.
3. Select the **to-be-opened-document**.
4. Click **Open**.
5. Document appears in the Document Viewer screen.

NOTE:

Applied annotations on documents opened from local system or local HDD(Hard Disk Drive) cannot be saved.

3.3.2 File Save Annotation

To save the annotations applied on the document

1. Press Ctrl + S or Click File menu, and then click Save Annotation.

3.3.3 File Print

To print the annotation, follow the following command.

1. Click Ctrl + P or Click File menu, and then click Print.

NOTE:

The Print Annotation is discussed earlier.

3.3.4 File Properties

To view information regarding the displayed image properties, follow the following commands.

1. Click Ctrl+I or Click File menu and then click Properties

NOTE:

The Image Properties dialog box is invoked which displays the properties of the image document, as shown in the following screen.

2. Click **OK** to close Image Properties window.

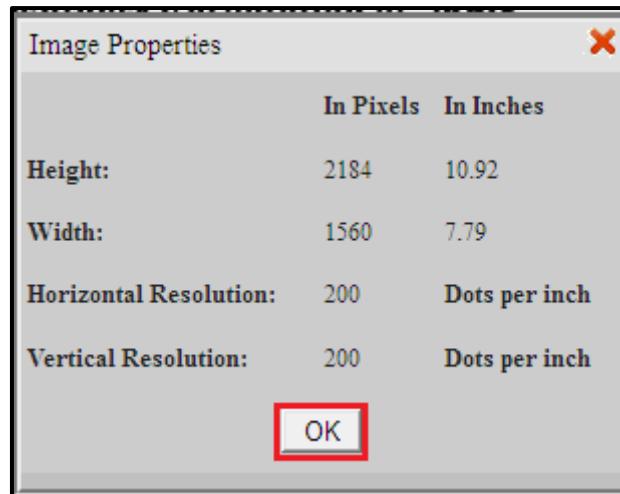


Figure: 3.89

3.4 Edit Menu

Edit Menu enabled only when annotation editing is allowed

The Edit Menu is shown in the following screen.



Figure: 3.90

Accessing Edit Menu:

Cut: Cut the selected annotation.

Copy: Copies the selected annotation.

Paste: Pastes the cut/copied annotation at a specified place on the image.

Undo: Enables the user to revert the immediately preceding annotation action carried out.

Undo All: Enables to revert all the annotation actions performed after the last save.

3.4.1 Edit Cut

To cut selected annotation

Click Ctrl + X or Click Edit menu, and then click Cut

3.4.2 Edit Copy

To copy selected annotation

Click Ctrl + C or Click Edit menu and then click Copy

3.4.3 Edit Paste

To paste the cut/copy annotations at a specified point on the image

Click + V or Click Edit menu, and then click Paste

3.4.4 Edit Undo

To revert immediate carried out action

Click Ctrl + Z or Click Edit menu, and then click Undo

3.4.5 Edit Undo All

To revert all the annotation actions performed after the last save:

Click Ctrl + A or Click Edit menu, and then click Undo All

3.5 Zoom Menu

The Zoom Menu is shown below in the following screen.

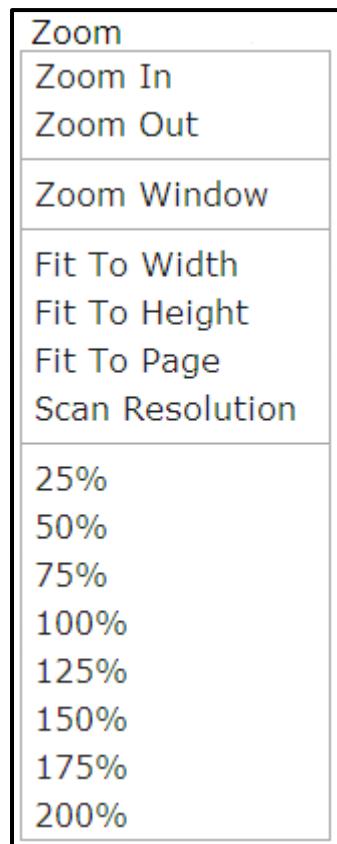


Figure: 3.91

Accessing Zoom Menu:

- **Zoom In:** Increases the size of the selected document
- **Zoom Out:** Decreases the size of the selected document
- **Zoom Window:** Invokes the zoom window which zooms the selected portion of the selected document.
- **Fit to Width:** Increases the width of the document to that of the width of the OpAll.
- **Fit to height:** Increases the height of the document to that of the height of the OpAll
- **Fit to page:** Increases the document so that it fits to the size of the OpAll
- **Scan Resolution:** Scans the resolution to that of the maximum resolution.

3.5.1 Zoom In

- To increase the size of the selected document, Click Zoom menu, and then click **Zoom In**.

3.5.2 Zoom Out

- To decrease the size of the selected document, Click Zoom menu, and then click **Zoom Out**.

3.5.3 Zoom Window

- To invoke the zoom window, click Zoom menu, and then click **Zoom Window**.

3.5.4 Fit to Width

- To increase the width of the document to that of the width of an OpAll, Click Zoom menu, and then click **Fit to Width**.

3.5.5 Fit to Height

- To increase the height of the document to that of the height of the OpAll, Click Zoom menu, and then click **Fit to Height**.

3.5.6 Fit to Page

- To increase the document so that it fits to the size of the OpAll, Click Zoom menu, and then click **Fit to Page**.

3.5.7 Scan Resolution

- To scan the resolution to that of the maximum resolution, Click Zoom menu, and then click **Scan Resolution**.

3.6 Transform Menu

- The Transform Menu is shown in the below screen.

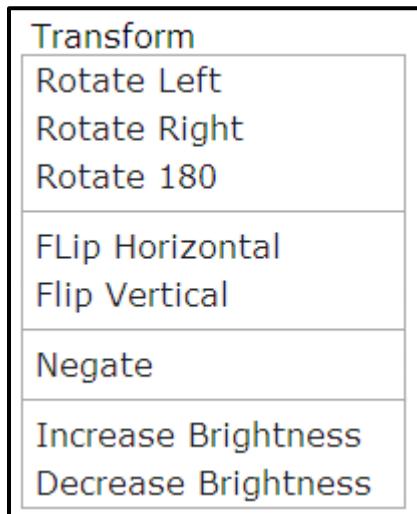


Figure: 3.92

Accessing Transform Menu:

- Rotate Left:** Rotates the document to left position
- Rotate Right:** Rotates the document to right position
- Rotate 180:** Rotates the document to 180.
- Flip Horizontal:** Horizontally rotates the document.
- Flip Vertical:** Vertically rotates the document.
- Negate:** Inverts the color of the document.
- Increase Brightness:** Increases the brightness of the document for viewing purpose.
- Decrease Brightness:** Decreases the brightness of the document for viewing purpose.

3.6.1 Rotate Left

- To rotate the document to left position, Click Transform, and then click **Rotate Left**.

3.6.2 Rotate Right

- To rotate the document to right position, Click Transform, and then click **Rotate Right**.

3.6.3 Rotate 180

- To rotate the document to 180, Click Transform, and then click **Rotate 180**.

3.6.4 Flip Horizontal

- To rotate the document horizontally, click Transform, and then click **Flip Horizontal**.

3.6.5 Flip Vertical

- To rotate the document vertically, click Transform, and then click **Flip Vertical**.

3.6.6 Transform Negate

- To invert the color of the document, click Transform, and then click **Negate**.

3.6.7 Increase Brightness

- To increase the brightness of the document for viewing purpose, Click Transform, and then click **Increase Brightness**.

3.6.8 Decrease Brightness

- To decrease the brightness of the document for viewing purpose, Click Transform, and then click **Decrease Brightness**.

3.7 Annotate Menu

Annotate Menu enabled only when annotation editing is allowed



Figure: 3.93

The annotation menu is used for applying annotations on the images. Checking the Enable Annotations menu item or any button on the annotation toolbar sets the OpAll in the annotation mode. This implies that the OpAll enables all the annotation operations except for the Hand Grabber, which remains disabled and toggles with the **Enable Annotation mode**.

Accessing Annotate Menu:

- **Enable Annotation:** Enables annotation drawing over the document.
- **New Group:** The New Group menu item allows the user to create a group, draw / modify annotations belonging to that group.
- **Delete Group:** Enables to delete the selected group.
- **Select Group:** Enables the user to select different annotation groups created for a document.

3.7.1 New Group

- 1) To create a group, draw/modify annotations belonging to the group, Click **Annotate** menu and then click **New Group**
- 2) The **Add New Annotation Group** screen is invoked



Figure: 3.94

- 3) Enter the required annotation group in which the annotations will get saved.
- 4) Click **OK** to save the changes made and to exit from the Add Annotation Group dialog box, else click **Cancel**.

3.7.2 Delete Group

- 1) To delete selected group, Click **Annotate** menu and then click **Delete Group**
- 2) The **Delete Annotation Group** dialog box appears.

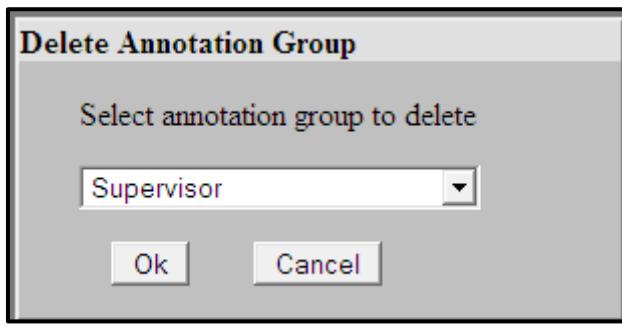


Figure: 3.95

NOTE:

The Delete Group option is not available for users having view rights for the specific group. After the group is deleted all annotations present within the group also get deleted

- 3) Select the required annotation group that needs to be deleted.
- 4) Click **OK** to delete the selected annotation group else click **Cancel**.

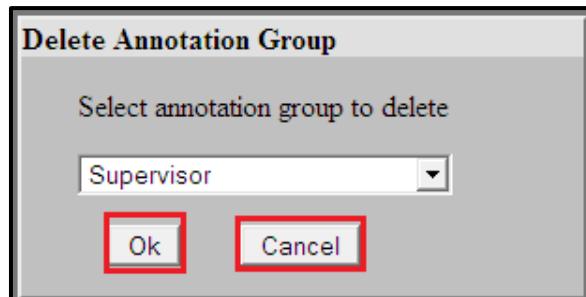


Figure: 3.96

3.7.3 Select Group

- 1) To select different annotation groups created for a document, Click **Annotate** menu and then click **Select Group**
- 2) Select the required group and all corresponding annotations applied or changed thereafter shall be effective for the selected group.

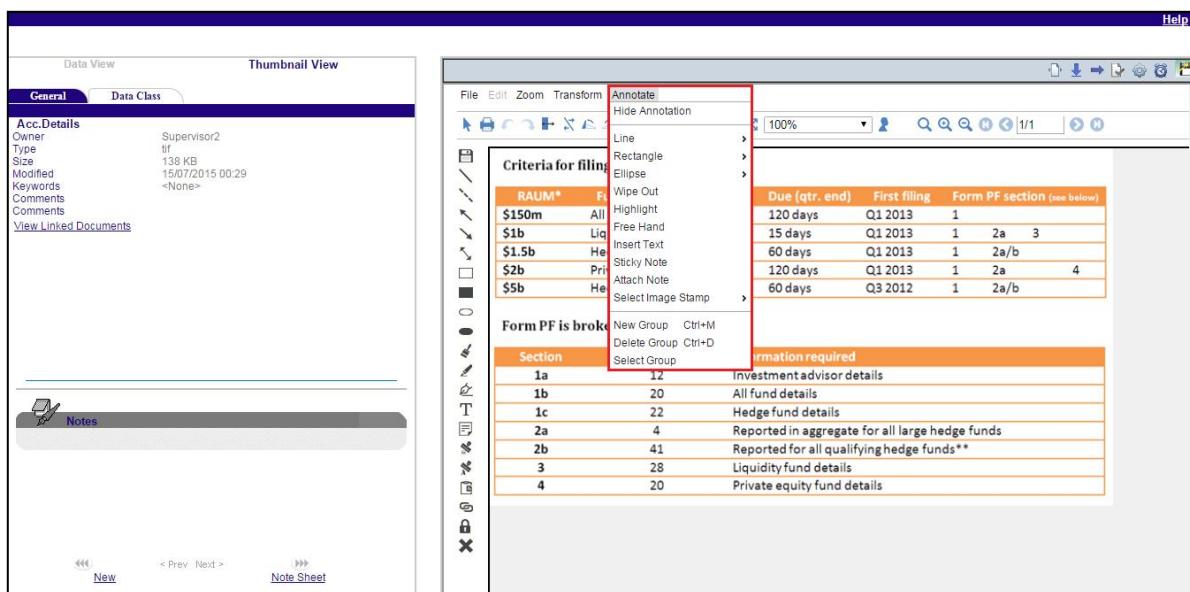


Figure: 3.97

- 3) Clicking on **Select Group** option, the **Select Annotation Group** window appears.

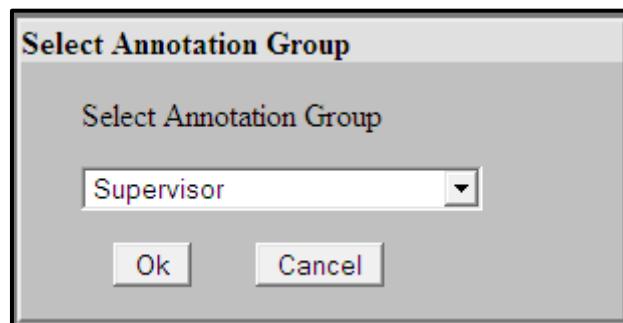


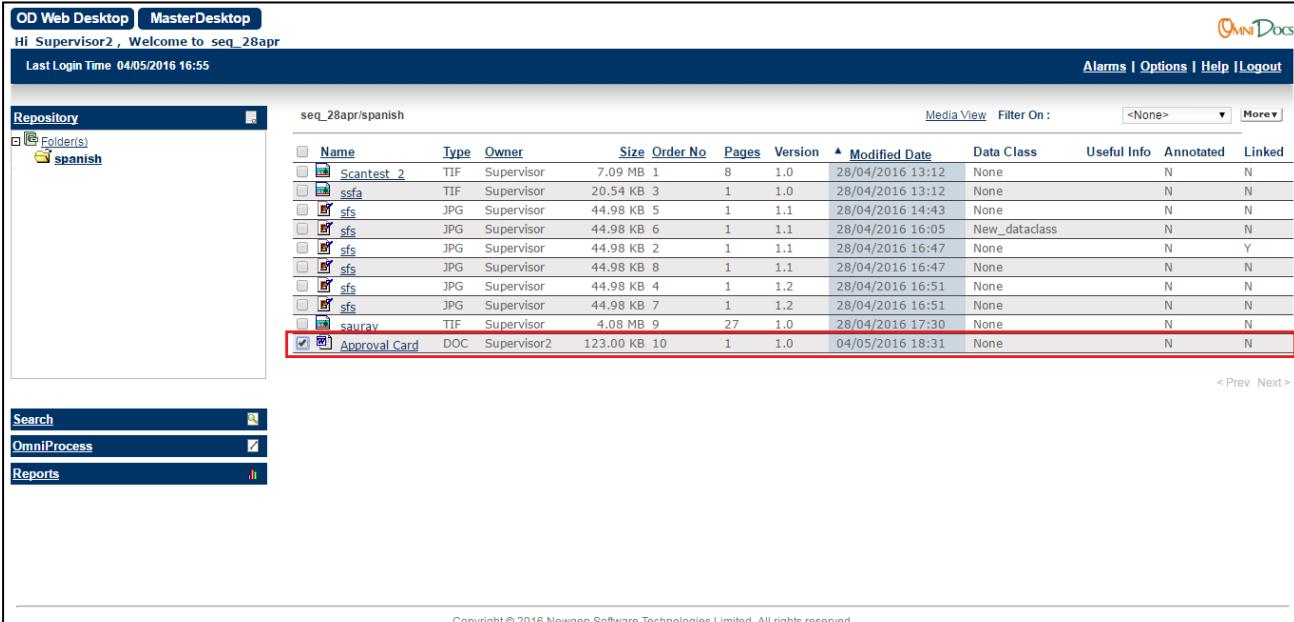
Figure: 3.98

3.8 Non-Image Document Operations

The non-image document will be open in its native application; the required prerequisite for opening the non-image document is the machine must have native application of the document.

Take an example of a DOC document, as per prerequisite the machine have the native application of DOC.:

1. Select a DOC document.



The screenshot shows the OmniDocs web interface. At the top, there's a header bar with 'OD Web Desktop' and 'MasterDesktop'. Below it, a message says 'Hi Supervisor2, Welcome to seq_28apr' and 'Last Login Time 04/05/2016 16:55'. On the right, there are links for 'Alarms | Options | Help | Logout' and the OmniDocs logo. The main area is titled 'Repository' and shows a list of files under 'seq_28apr/spanish'. The columns are: Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. One file, 'Approval Card', is selected and highlighted with a red border. At the bottom, there are navigation links for 'Search', 'OmniProcess', and 'Reports', along with a copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Name	Type	Owner	Size	Order No	Pages	Version	Modified Date	Data Class	Useful Info	Annotated	Linked
Scantest_2	TIF	Supervisor	7.09 MB	1	8	1.0	28/04/2016 13:12	None	N	N	
ssfa	TIF	Supervisor	20.54 KB	3	1	1.0	28/04/2016 13:12	None	N	N	
sfs	JPG	Supervisor	44.98 KB	5	1	1.1	28/04/2016 14:43	None	N	N	
sfs	JPG	Supervisor	44.98 KB	6	1	1.1	28/04/2016 16:05	New_dataclass	N	N	
sfs	JPG	Supervisor	44.98 KB	2	1	1.1	28/04/2016 16:47	None	N	Y	
sfs	JPG	Supervisor	44.98 KB	8	1	1.1	28/04/2016 16:47	None	N	N	
sfs	JPG	Supervisor	44.98 KB	4	1	1.2	28/04/2016 16:51	None	N	N	
sfs	JPG	Supervisor	44.98 KB	7	1	1.2	28/04/2016 16:51	None	N	N	
saurav	TIF	Supervisor	4.08 MB	9	27	1.0	28/04/2016 17:30	None	N	N	
Approval Card	DOC	Supervisor2	123.00 KB	10	1	1.0	04/05/2016 18:31	None	N	N	

Figure: 3.99

2. A 'File Download' dialog box appears. Click '**Open**' tab to open document in its native application, Click the '**Save**' tab to save the document and click '**Cancel**' tab to close the dialog box without saving and opening the document.
3. Click **Open** tab in the following dialog box.

Document Viewing – OpAll Viewer

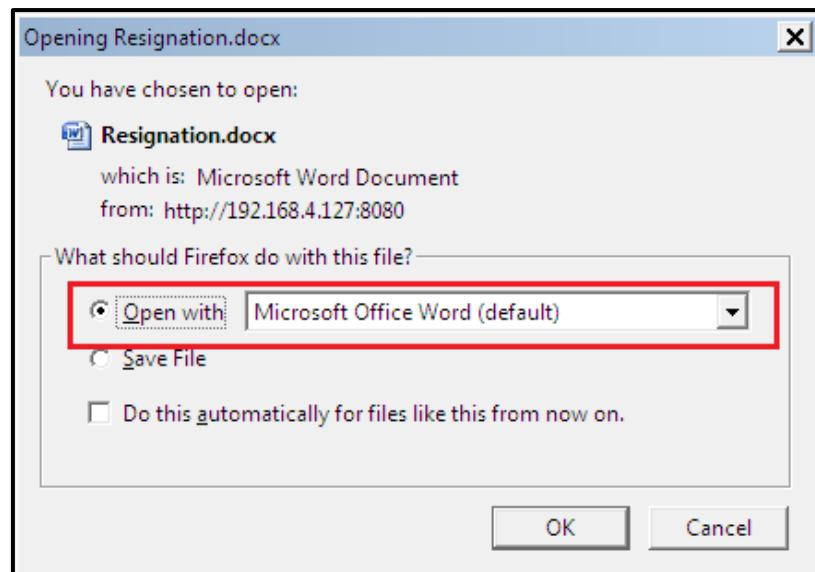


Figure: 3.100

4. The selected document gets opens in its native application, as shown:

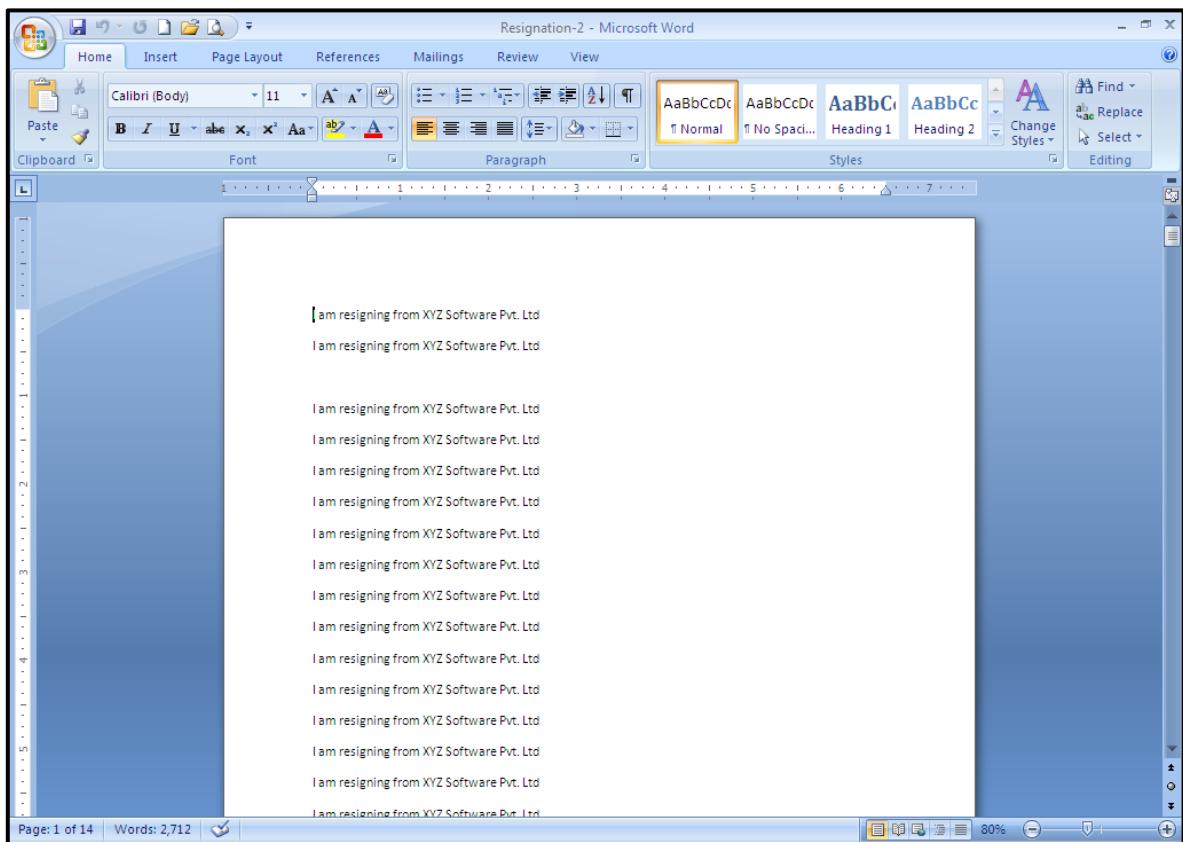


Figure: 3.101

NOTE:

If OIVT is not installed on the server machine and you try to open a document, then the document gets invoked in its native application provided the application is installed on the client's machine. If the application is not installed then a Download screen is invoked through which the user can either download the document or open it.

3.9 Viewing Options

NOTE:

Viewing Options are applicable only for Image Documents

For Image Document, you can specify a particular page number and view it. You also have various zoom options.

To view a specific page of the document, follow the following trace:

1. Specify the page number in text box, and click Enter. The specified page is displayed.

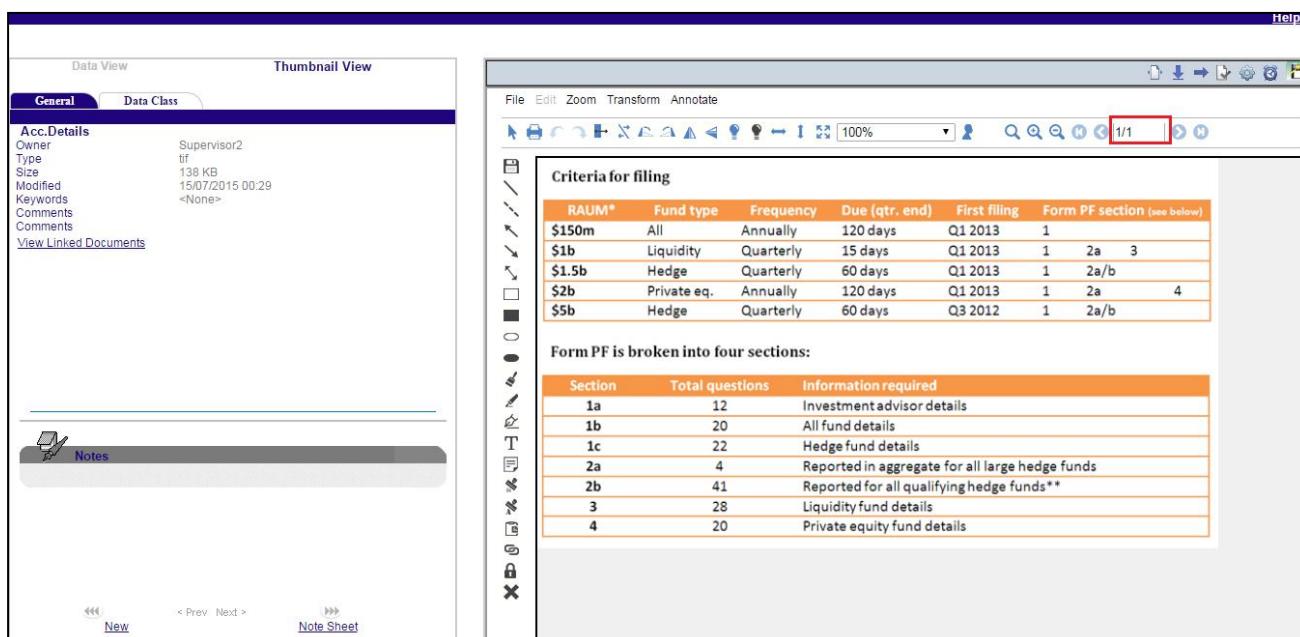


Figure: 3.102

2. To browse through the pages, click Next Page or Prev Page button. You can go directly to the first page or the last page of the document by clicking the and buttons.

Document Viewing – OpAll Viewer

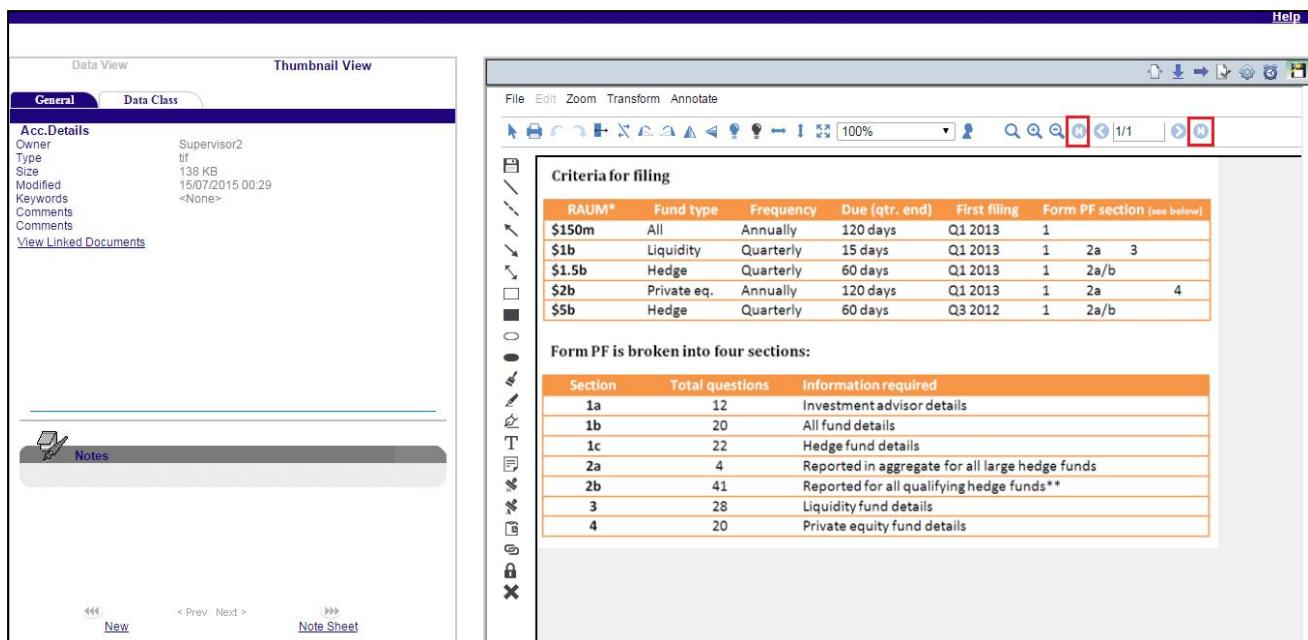
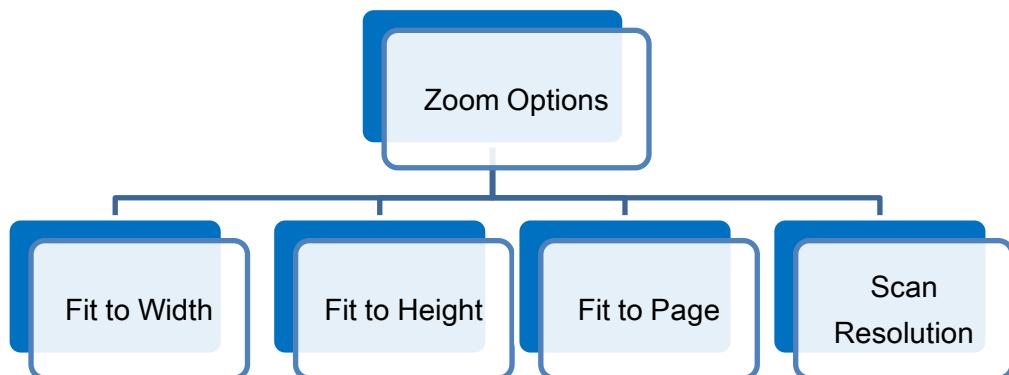


Figure: 3.103

Zoom Options

There are four zoom options for the Image Documents.



- **Fit to Width** option enables to display the image without the horizontal scroll bar.
- **Fit to Height** option enables to display the image without the vertical scroll bar.
- **Fit to Page** option enables to display the image without the horizontal and vertical scroll bars.
- **Scan DPI** enables to display the image at the DPI on which it was scanned.

To set the zoom level for a document:

1. Select any of the option from Zoom combo box. The document is displayed according to the specified zoom level.

3.10 Document view in Full Text Search

3.10.1 Hit Highlighting

A user can perform full text search to determine the documents that contain specific word(s) or phrase. The documents that contain those word(s) are then listed. The user can then view the document.

Generally the user wants to see that part of the document, which contains the specified word(s). The Hit-highlighting feature opens the image document and highlights the specified words wherever they occur in the document. In case of multiple pages initially, the first page that contains any of the specified word is opened.

Full text search is a very powerful feature for **retrieving documents**. It is performed by specifying a word within the document body to search for. All the documents that contain that text are obtained. It is very useful in situations where the user is looking for all the documents that pertain to some particular subject and are present in different locations.

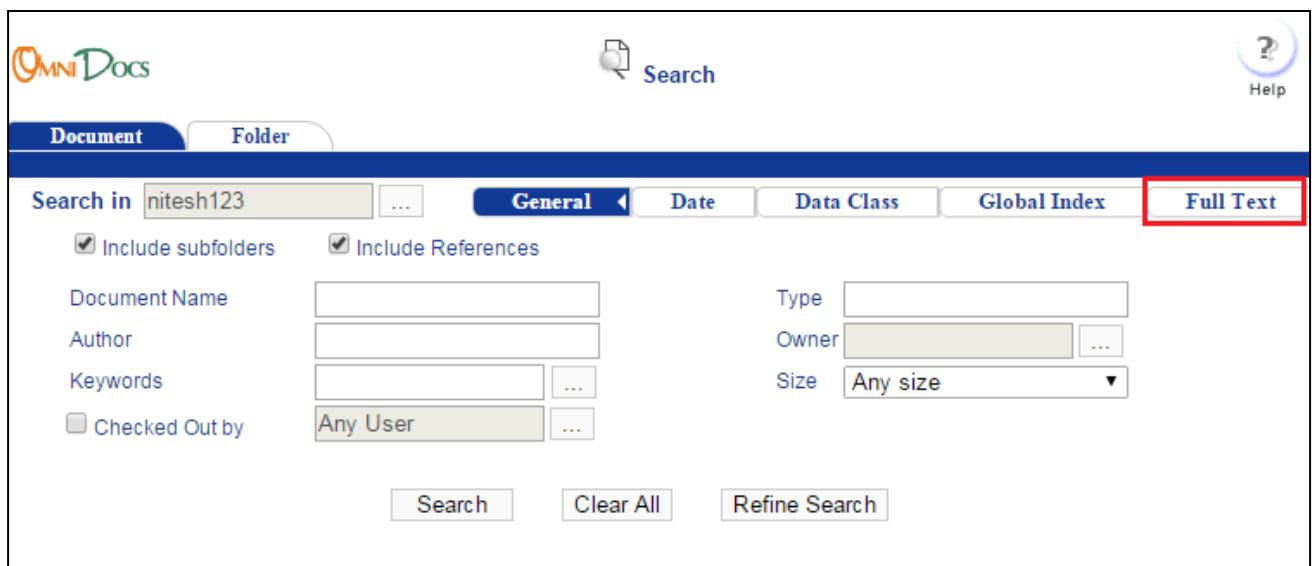


Figure: 3.104

Full text search feature is provided in the OmniDocs product for both the **image and non-image** documents. The user can search for documents by specifying the words that he is looking for in the document body. All the documents that contain that text are identified and are then listed.

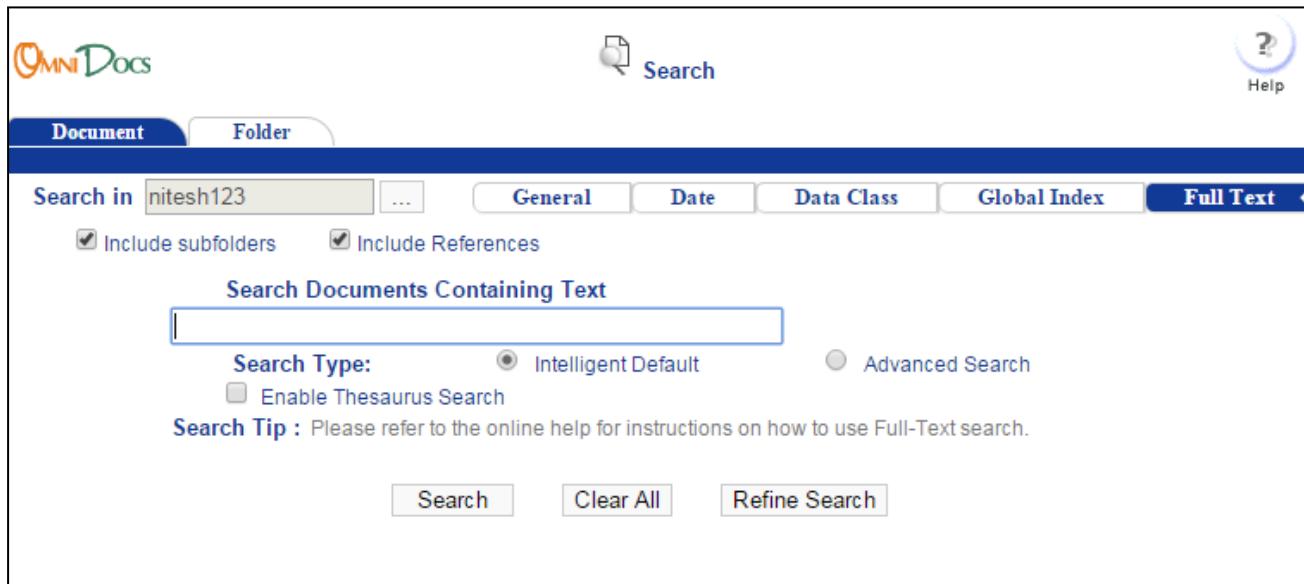


Figure: 3.105

The user specifies search criteria for full text search, the documents are searched based on this criteria and the resultant document list is then displayed to the user. The user can then view any of those documents.

The **first objective** is to provide the user a mean to identify the exact location where those words are present so that he does not have to look for them in the document.

We can do this by highlighting the searched words in the document. So whenever the user views the document retrieved as a result of FTS, the document will be displayed with the word on which search was done, coming highlighted, at all the places where the word is present in the document.

The word may be present at multiple locations in the same page or in case of multi-page document it may be present in different pages.

The **second objective** for the case of multi-page document is to allow him to navigate to the next or previous page that contains that word.

We can do this by providing four toolbar buttons. Two for moving to the next or previous location of the word in the same page and two for moving to the next or previous page. The user can also traverse between the pages that contain the given word.

Full Text Search – OD Web Desktop

User can even carry out the full text search using the OD Web Desktop. This they can carry out by following the given steps:

1. Select the Search option in OD Web Desktop home page.
2. In the Search Option, select **Full Text Search**.
3. Following page appears:

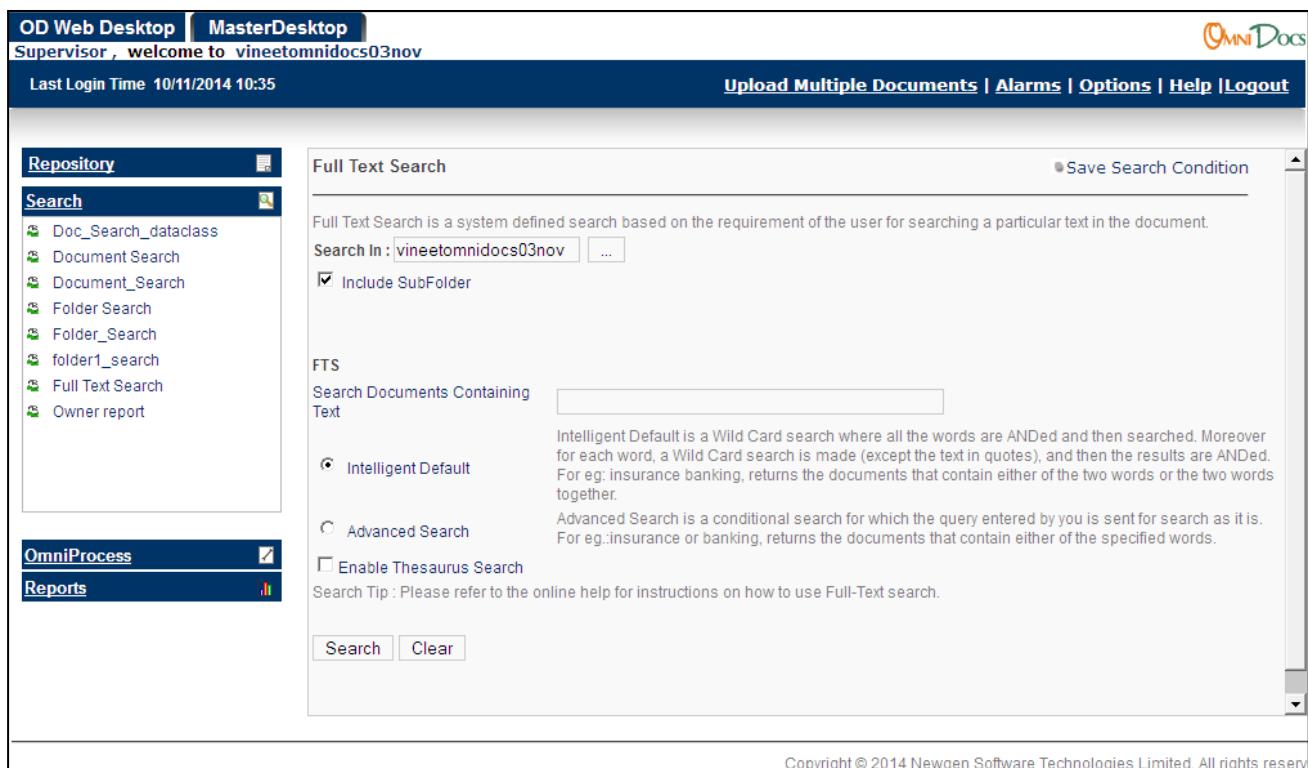


Figure: 3.106

4. In this page, enter the necessary details.
5. Click the **Search** button, to search the text.
6. Else, click **Clear** to clear the entered details.

Different databases display different output result, for the same set of "FTS Search Input". In order to optimize your search result, please refer the following tables as per your OmniDoc's database.

Full Text Search (Oracle)

Search Type	Search operators	Input in FTS search box (syntax)	Result
Intelligent Search	Normal search	Word . eg: chain	It will return all documents containing word or phrase beginning with chain.
	Normal search with more than one word	"word1 word2". Eg: Mountain Road	It will return all documents containing word or phrase beginning with Mountain and Road.
	Using wildcard character	Word*(asterisk). Eg: chain*	It will return all documents containing word or phrase beginning with chain.
	Using OR	Word1 or word2. eg: Mountain or Road	It will return all documents containing word or phrase beginning with mountain or road.
	Using AND	Word1 and word2. eg: Mountain and Road	It will return all documents containing word or phrase beginning with both mountain and road.
	Using NEAR	Word1 near word2. eg: Mountain near Road	It will return all documents containing word1 near word2.
	Using AND NOT	Word1 and not Word2. Eg: Mountain and not	It will return all documents containing word1(Mountain) and not containing

Document Viewing – OpAll Viewer

	Road	word2(Road).
Advance Search	Normal search with single word	Word . eg: chain
	Normal search with more than one word	"word1 word2". Eg: "Mountain Road"
	Using wildcard character	"Word*". Eg: "chain*"
	Using OR	Word1 or word2. eg: Mountain or Road
	Using AND	Word1 near word2 .eg: Mountain and Road
	Using NEAR	Word1 near word2. eg: Mountain near Road
	Using AND NOT	Word1 and not Word2. Eg: Mountain and not Road
	Using wildcard character and OR	"Word1*" or "word2*". Eg: "Mountain*" or "Road*"
		"Word1*" or "word2". Eg: "Mountain*" or "Road"
	Using wildcard character and AND	"Word1*" and "word2*". Eg: "Mountain*" and "Road*"
		"Word1*" and "word2". Eg: "Mountain*" and "Road"

NOTE:

Wildcard search does not work when wildcard character is used in the starting or in the middle of the word i.e. if you specify "*Chain" or "Ch*ain", you will not get the expected result. The asterisk will be considered as a normal punctuation mark not a wildcard character.

Full Text Search(MSSQL)

Search Type	Search operators	Input in FTS search box (syntax)	Result
Intelligent Search	Normal search	Word . eg: chain	It will return all documents containing word or phrase beginning with chain.
	Normal search with more than one word	"word1 word2". Eg: Mountain Road	It will return all documents containing word or phrase beginning with Mountain and Road.
	Using wildcard character	Word*(asterisk). Eg: chain*	It will return all documents containing word or phrase beginning with chain.
	Using OR	Word1 or word2. eg: Mountain or Road	It will return all documents containing word or phrase beginning with mountain or road.
	Using AND	Word1 and word2. eg: Mountain and Road	It will return all documents containing word or phrase beginning with both mountain and road.
	Using NEAR	Word1 near word2. eg: Mountain near Road	It will return all documents containing word1 near word2.
	Using AND NOT	Word1 and not Word2. Eg: Mountain and not Road	It will return all documents containing word1(Mountain) and not containing word2(Road).
Advance Search	Normal search with single word	Word . eg: chain	It will return all documents containing word chain.
	Normal search with more than one word	"word1 word2". Eg: "Mountain Road"	It will return all documents containing phrase Mountain Road.

Document Viewing – OpAll Viewer

	Using wildcard character	"Word*". Eg: "chain*"	It will return all documents containing word or phrase beginning with chain.
	Using OR	Word1 or word2. eg: Mountain or Road	It will return all documents containing any word among mountain or road.
	Using AND	Word1 near word2 .eg: Mountain and Road	It will return all documents containing both words.
	Using NEAR	Word1 near word2. eg: Mountain near Road	It will return all documents containing word1 near word2.
	Using AND NOT	Word1 and not Word2. Eg: Mountain and not Road	It will return all documents containing word1(Mountain) and not containing word2(Road).
	Using wildcard character and OR	"Word1*" or "word2*". Eg: "Mountain*" or "Road*"	It will return all documents containing any word or phrase beginning with mountain or road.
		"Word1*" or "word2" . Eg: "Mountain*" or "Road"	It will return all documents containing any word beginning with road or phrase beginning with mountain .
	Using wildcard character and AND	"Word1*" and "word2*". Eg: "Mountain*" and "Road*"	It will return all documents containing any word or phrase beginning with mountain and road.
		"Word1*" and "word2" . Eg: "Mountain*" and "Road"	It will return all documents containing any word beginning with road and word/phrase beginning with mountain .

NOTE:

Wildcard search does not work when wildcard character is used in the starting or in the middle of the word i.e. if you specify "*Chain" or "Ch*ain", you will not get the expected result. The asterisk will be considered as a normal punctuation mark not a wildcard character.

Full Text Search(PostgreSQL)

Search Type	Search operators	Input in FTS search box (syntax)	Result
Intelligent Search	Normal search	Word . eg: chain	It will return all documents containing word or phrase beginning with chain.
	Normal search with more than one word	"word1 word2". Eg: Mountain Road	It will return all documents containing word or phrase beginning with Mountain and Road.
	Using OR	Word1 or word2. eg: Mountain or Road	It will return all documents containing word or phrase beginning with mountain or road.
	Using AND	Word1 and word2. eg: Mountain and Road	It will return all documents containing word or phrase beginning with both mountain and road.
Advance Search	Normal search with single word	Word . eg: chain	It will return all documents containing word chain.
	Normal search with more than one word	"word1 word2". Eg: "Mountain Road"	It will return all documents containing phrase Mountain Road.
	Using wildcard character	"Word*". Eg: "chain*"	It will return all documents containing word or phrase beginning with chain.
	Using OR	Word1 or word2. eg: Mountain or Road	It will return all documents containing any word among mountain or road.
	Using AND	Word1 near word2 .eg: Mountain and Road	It will return all documents containing both words.

NOTE:

Wildcard search does not work when wildcard character is used in the starting or in the middle of the word i.e. if you specify "*Chain" or "Ch*ain", you will not get the expected result. The asterisk will be considered as a normal punctuation mark not a wildcard character.

3.10.2 Ranking

When we search a document through full text search in search results we are provided a column called rank in it. The rank indicates the frequency of no of occurrences of the searched word, for e.g. if the rank for a document "A" is 10 and the rank for a document "B" is 15 then it indicates the frequency of occurrence of searched word is more in the document having rank as 15.

4 Document Viewing – Applet Viewer

NOTE:

By default Applet Viewer will be disable, it would only get enable when the **JRE free mode** is **DISABLE**.

Image Viewer Applet is a lightweight multithreaded applet, based on Java beans architecture, which comes along with OmniDocs. It uses Newgen's Java-based imaging libraries to support viewing, manipulating, and applying diverse annotations on documents of various Image formats, such as TIFF, JPEG, GIF etc., and can be used with any standard browser (IE/Netscape etc.). Image Viewer applet uses a unique progressive display mechanism for optimized image display. It provides super fast geometric operations like invert, flip etc. In addition, when image document is opened in applet viewer user can perform the rotation of images in multiple of 90 degree angle and also can save the rotation. After saving rotation, the document will be updated in repository as well.

The user can view both image and non-image documents in the Newgen OmniDocs Web application. The document properties, notes, and annotations attached with the document are also displayed in this application.

To view any document, follow the following steps:

Select the document from the OmniDocs Web Desktop. The non-image documents are invoked in the browser, and image documents are invoked in the **Applet**. In case OIVT is installed on the server machine, user is given an option to set his own preferences in order to view the document.

NOTE:

The annotations applied on the image document through the OmniDocs Desktop are also visible in the OmniDocs Web.

4.1 Image Document Operations

4.1.1 Viewing Image Documents

1. The Image documents include the .TIF files. Double click a TIF document.

The screenshot shows the OmniDocs Web Desktop interface. At the top, there are tabs for 'OD Web Desktop' and 'MasterDesktop'. Below that, a message says 'Hi Supervisor2, Welcome to seq_28apr' and 'Last Login Time 04/05/2016 16:55'. On the right, there's a 'OmniDocs' logo and links for 'Alarms | Options | Help | Logout'. The main area is titled 'seq_28apr/spanish' and contains a table of image documents. The table has columns: Name, Type, Owner, Size, Order No., Pages, Version, Modified Date, Data Class, Useful Info, Annotated, and Linked. One row is highlighted with a red border, corresponding to the file 'Scantest_2'. The table lists several files, mostly in JPEG format, with sizes ranging from 4.08 MB to 20.54 KB. At the bottom of the table, there are navigation links '< Prev' and 'Next >'. The footer of the page includes links for 'Search', 'OmniProcess', and 'Reports', along with a copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Name	Type	Owner	Size	Order No.	Pages	Version	Modified Date	Data Class	Useful Info	Annotated	Linked
Scantest_2	TIF	Supervisor	7.09 MB	1	8	1.0	28/04/2016 13:12	None	N	N	N
ssfa	TIF	Supervisor	20.54 KB	3	1	1.0	28/04/2016 13:12	None	N	N	N
sfs	JPG	Supervisor	44.98 KB	5	1	1.1	28/04/2016 14:43	None	N	N	N
sfs	JPG	Supervisor	44.98 KB	6	1	1.1	28/04/2016 16:05	New_dataclass	N	N	N
sfs	JPG	Supervisor	44.98 KB	2	1	1.1	28/04/2016 16:47	None	N	Y	N
sts	JPG	Supervisor	44.98 KB	8	1	1.1	28/04/2016 16:47	None	N	N	N
sfs	JPG	Supervisor	44.98 KB	4	1	1.2	28/04/2016 16:51	None	N	N	N
sfs	JPG	Supervisor	44.98 KB	7	1	1.2	28/04/2016 16:51	None	N	N	N
saurav	TIF	Supervisor	4.08 MB	9	27	1.0	28/04/2016 17:30	None	N	N	N

Figure: 4.1

2. The selected document gets invoked in the Applet Viewer.

Document Viewing – Applet Viewer

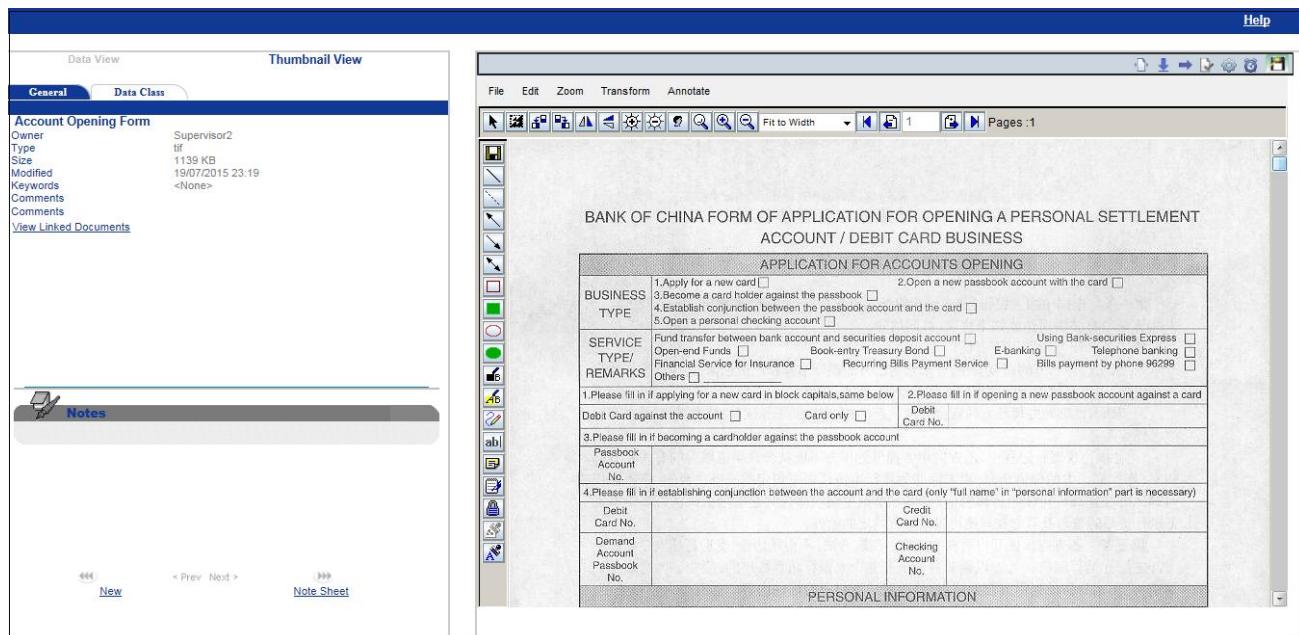


Figure: 4.2

NOTE:

PRINT SCREEN DISABLED Security Feature

- Print Screen disabling feature is configurable by admin user.
 - In order to prevent unauthorized access to the documents, OmniDocs 8.0 is enabled with an advanced Print Screen disabling feature. This means, "Print screen" will be disabled till the time any document is opened from OmniDocs application.
-

1. **Data View:** Data View displays the document along with its general properties, data class and associated notes in the left frame of the screen.

a. General Tab:

The General displays the General Properties of the selected document such as the name of the document, the type, number of pages, the size, modification date, the owner of the document, and keywords associated with the document.

Document Viewing – Applet Viewer

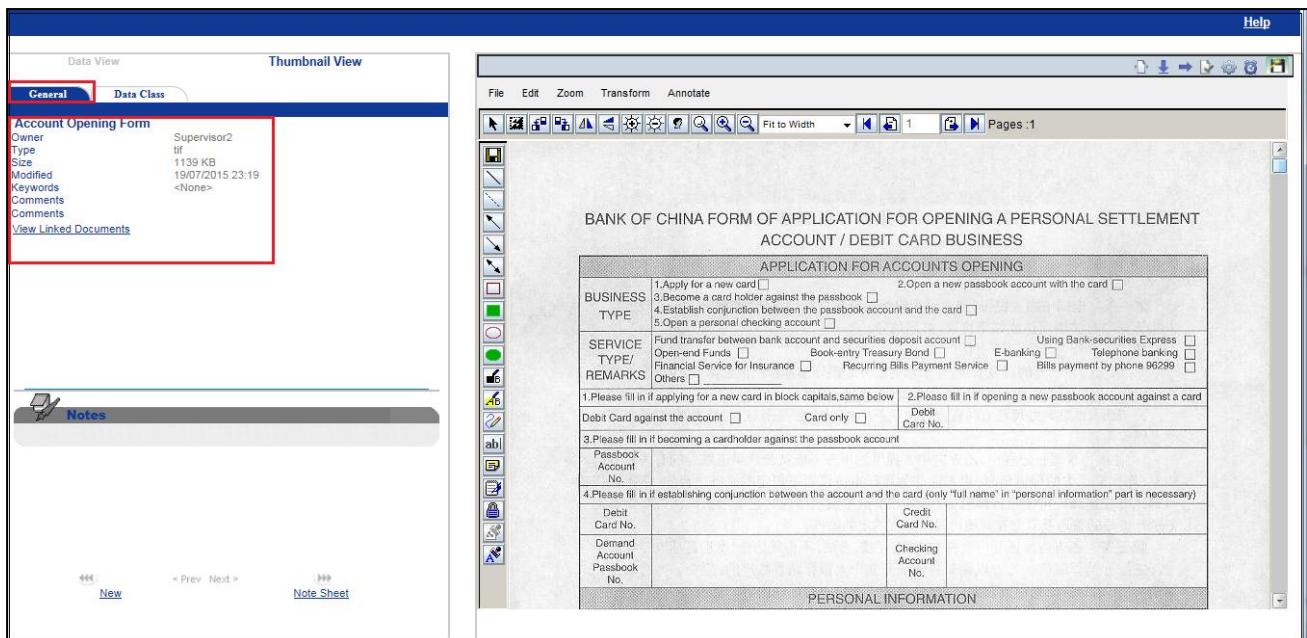


Figure: 4.3

b. Data Class Tab:

The Data Class displays the Data Class associated with the particular document along with their field values. (Refer [Figure 4.4](#))

2. **Thumbnail View:** Thumbnail View displays the document along with its thumbnail image in the left frame of the screen.

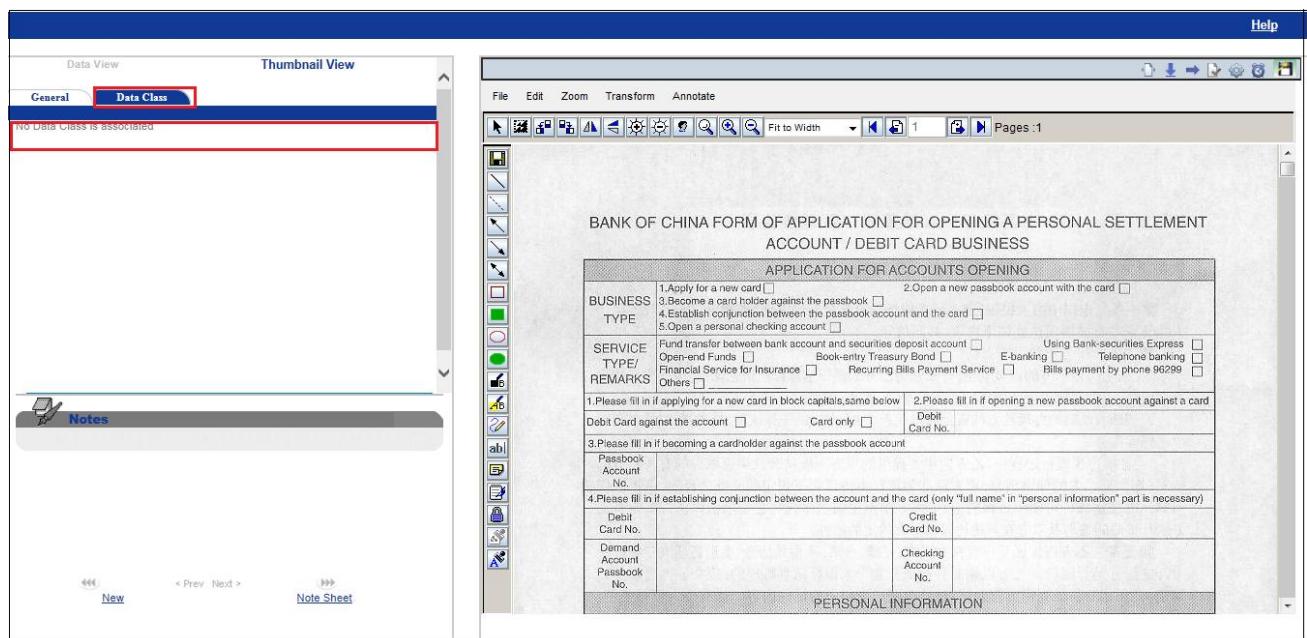


Figure: 4.4

Applet Toolbar:

The top of the screen consists of the Applet toolbar.

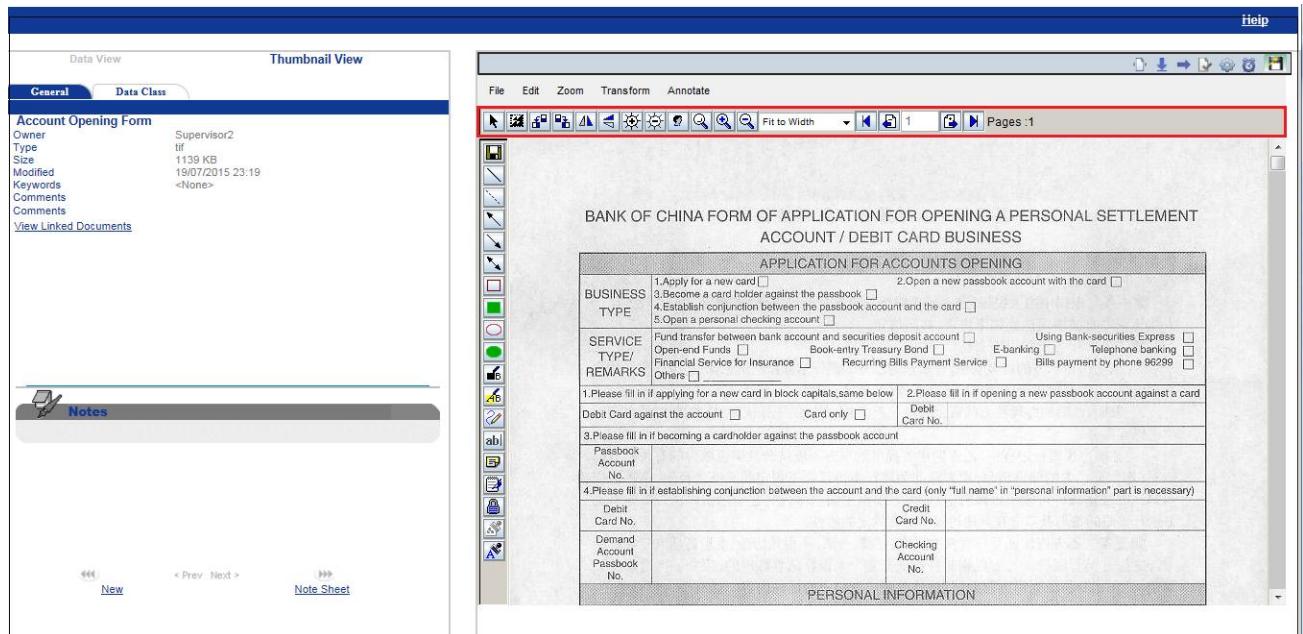


Figure: 4.5

Annotation Toolbar:

The left side bar of the right consists of the Annotation toolbar.

4.1.1.1 Applet Toolbar

The various types of Applet toolbars are as follows:

Enable Dragging button disables the drawing annotation toolbars, and helps in moving annotations anywhere on the opened document.

Enable Dragging is a toggle toolbar which changes to button (Enable annotation Drawing).

Document Viewing – Applet Viewer

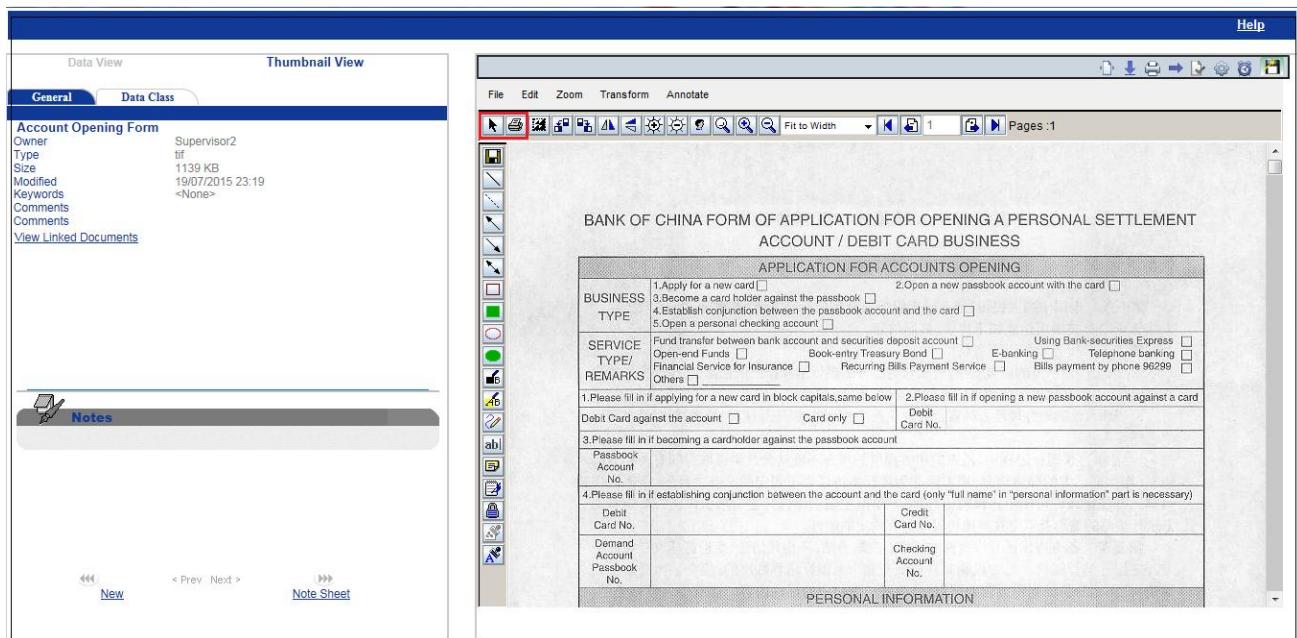


Figure: 4.6

NOTE:

The annotation toolbars, such as, Solid Line Drawing, Dashed Line Drawing, Leading Arrow line drawing, Trailing Arrow line drawing, Double Arrow line drawing, Rectangle drawing, Solid Rectangle drawing, Ellipse drawing, Solid Ellipse drawing, Wipe out drawing, High light drawing, Insert Text buttons are enabled only if the Enable Annotation Drawing button is clicked.

Print button Prints (Refer [Figure 4.6](#)) the displayed annotation. When this icon is clicked, a Print dialog box gets invoked.

- To print the **Current page with Annotations**, Click **OK** button to print the Current Page with Annotations. Click **Cancel** button to close the Print dialog box without printing.

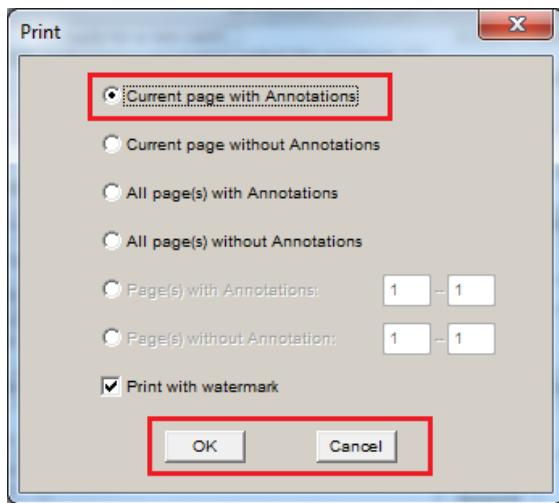


Figure: 4.7

- To print the **Current page without annotations**, Click **OK** button to print the current page without annotations. Click **Cancel** button to close the Print dialog box without printing.

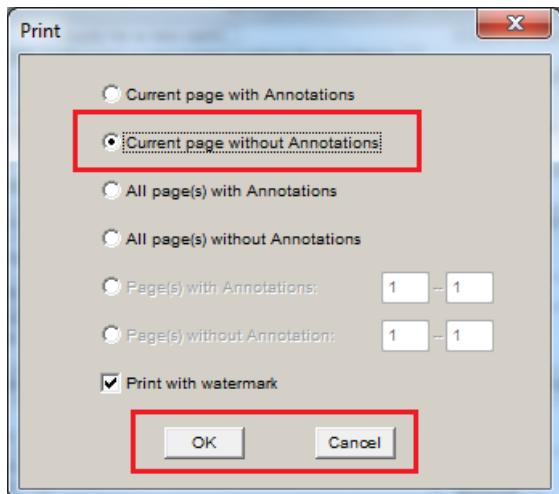


Figure: 4.8

For multiple page printing:

- Select the option **All Pages with or without Annotations** to print all the pages of the selected document.
- Or specify the page range that has to be printed.
- Click **OK** button to print the document.

- Click **Cancel** button to close the Print dialog box without printing.

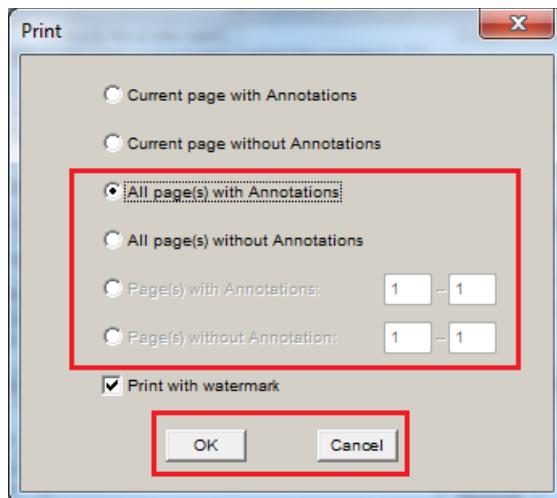


Figure: 4.9

 **Negate** button inverts the color of the document. For example, white turns black and vice versa.

- Click the **Negate** button.
- Inverted color of the document is shown in the following screen.

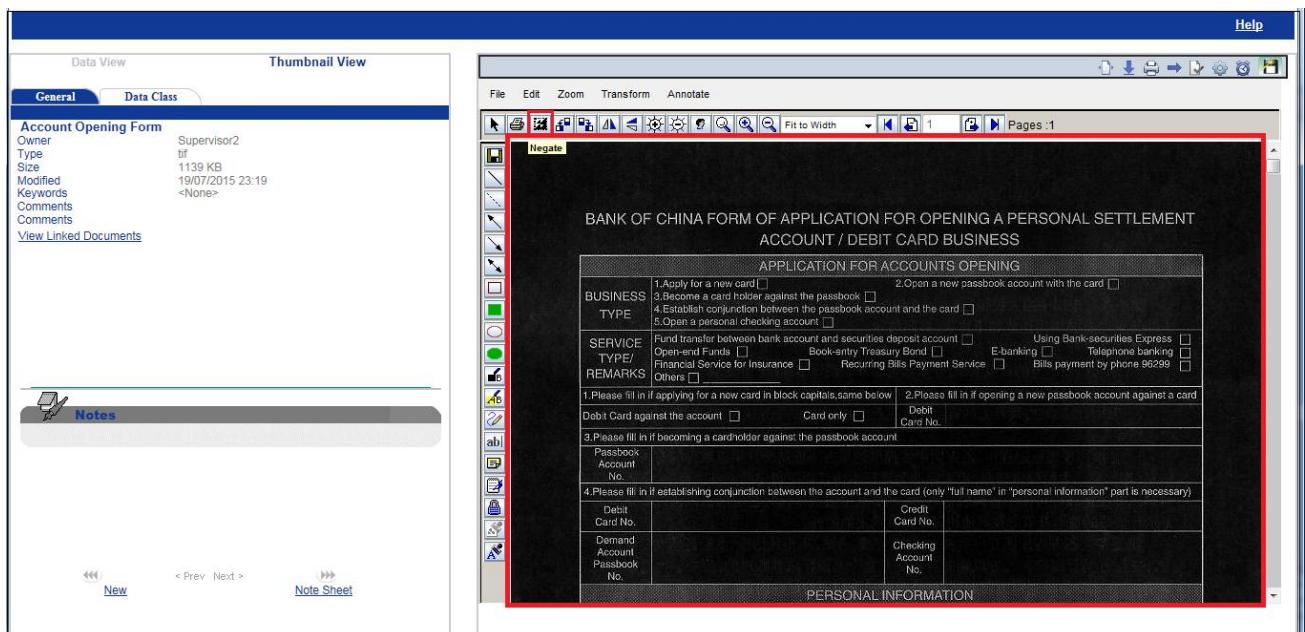


Figure: 4.10



Rotate Left button rotates the document left.

- Click the **Rotate Left** button and save it.
- The rotated left document is shown in the following screen.

The screenshot shows the OmniDocs interface with a rotated document. The top navigation bar includes 'Data View' and 'Thumbnail View'. Below it, tabs for 'General' and 'Data Class' are visible. A sidebar on the left displays document metadata: 'Account Opening Form', 'Owner: Supervisor2', 'Type: tif', 'Size: 1139 KB', 'Modified: 19/07/2015 23:19', 'Keywords: <None>', and 'Comments: Comments'. A link 'View Linked Documents' is also present. A 'Notes' section is at the bottom left. The main content area contains a form titled 'BANK OF CHINA FORM OF APPLICATION FOR OPENING A PERSONAL SETTLEMENT ACCOUNT / DEBIT CARD OPENING'. This form is labeled 'Rotate Left' with a red border. It includes sections for 'BUSINESS', 'TYPE', 'SERVICE', 'REMARKS', 'PERSONAL INFORMATION', and 'BANKS' (with a 'ROTATE' button). At the bottom right, there's a 'STATEMENT FOR GETTING A DEBIT CARD' section with fields for 'CUSTOMER SIGNATURE', 'DATE', and 'HANDLING STAFF SIGNATURE', both of which are filled with 'MADODDY'.

Figure: 4.11



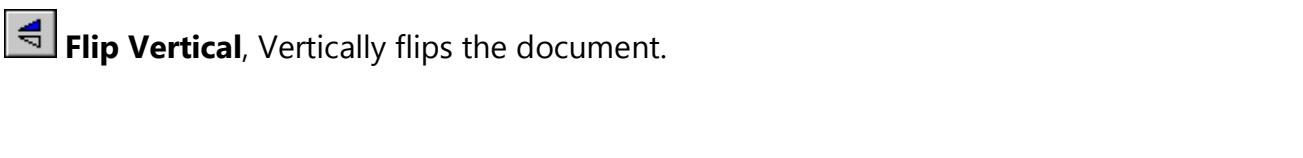
Rotate Right button rotates the document right to its original position.

- Click the **Rotate Right** button and save it.
- The rotated right document is shown in the following screen.

Document Viewing – Applet Viewer

Figure: 4.12

Figure: 4.13



Document Viewing – Applet Viewer

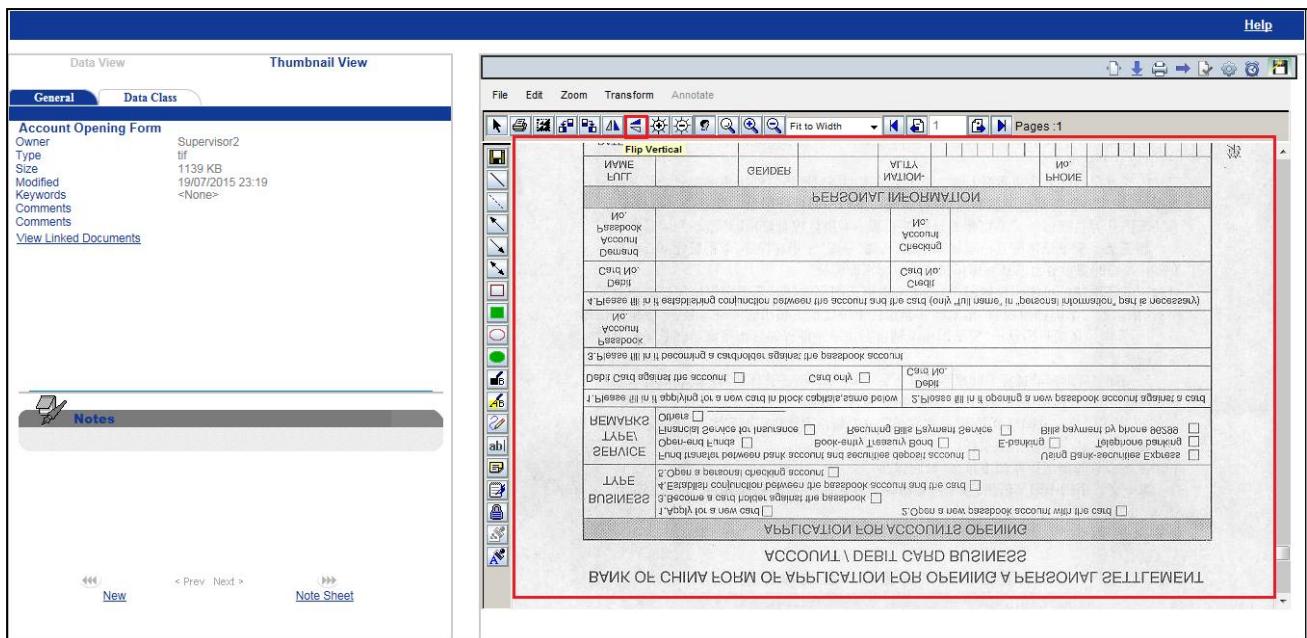


Figure: 4.14



Increase Brightness, increases the brightness of the document.

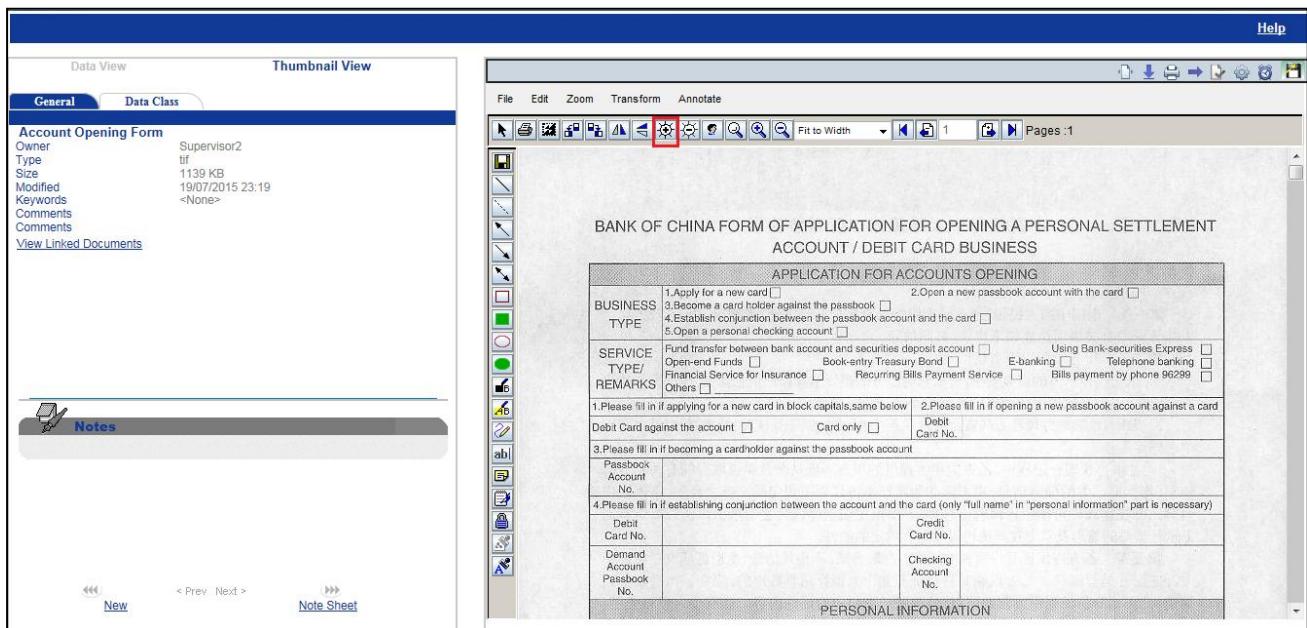


Figure: 4.15



Decrease Brightness, decreases the brightness of the document for viewing purpose.

Document Viewing – Applet Viewer

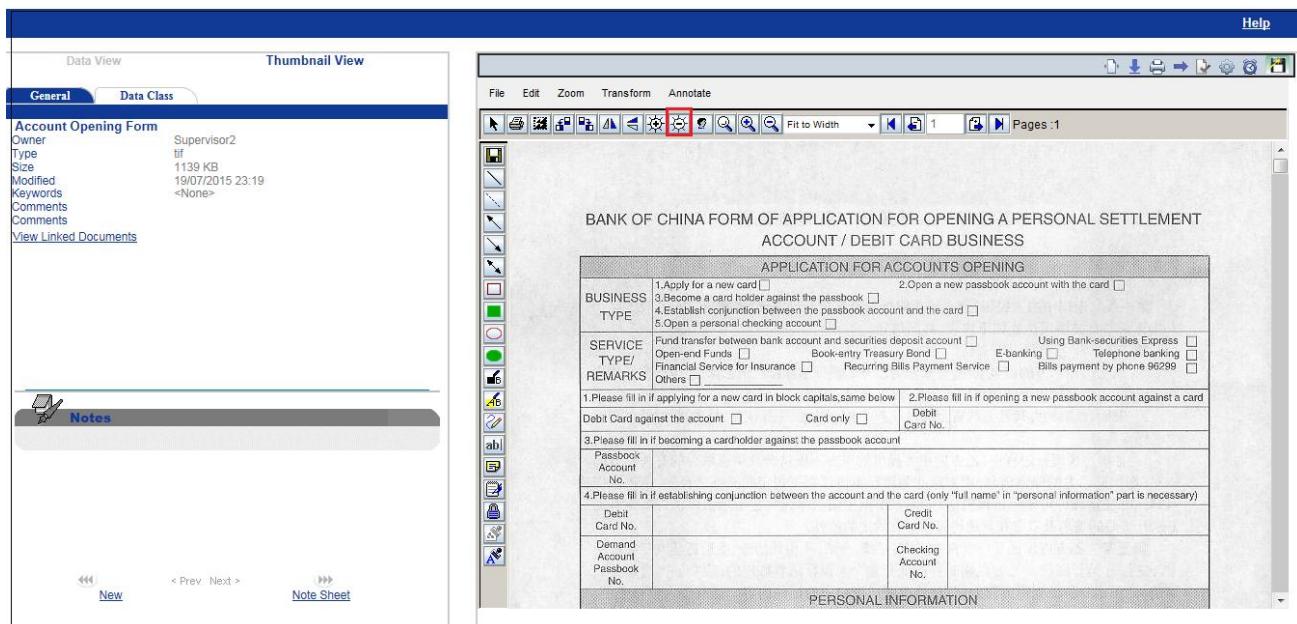


Figure: 4.16



Annotations With Username button displays the name of the person who has applied the annotation, time and date in the document when the annotation is applied by the user.

- Click the **Annotations With Username** button, to display the name of the person who has applied the annotation, time and date in the document when the annotation is applied by the user.

Document Viewing – Applet Viewer

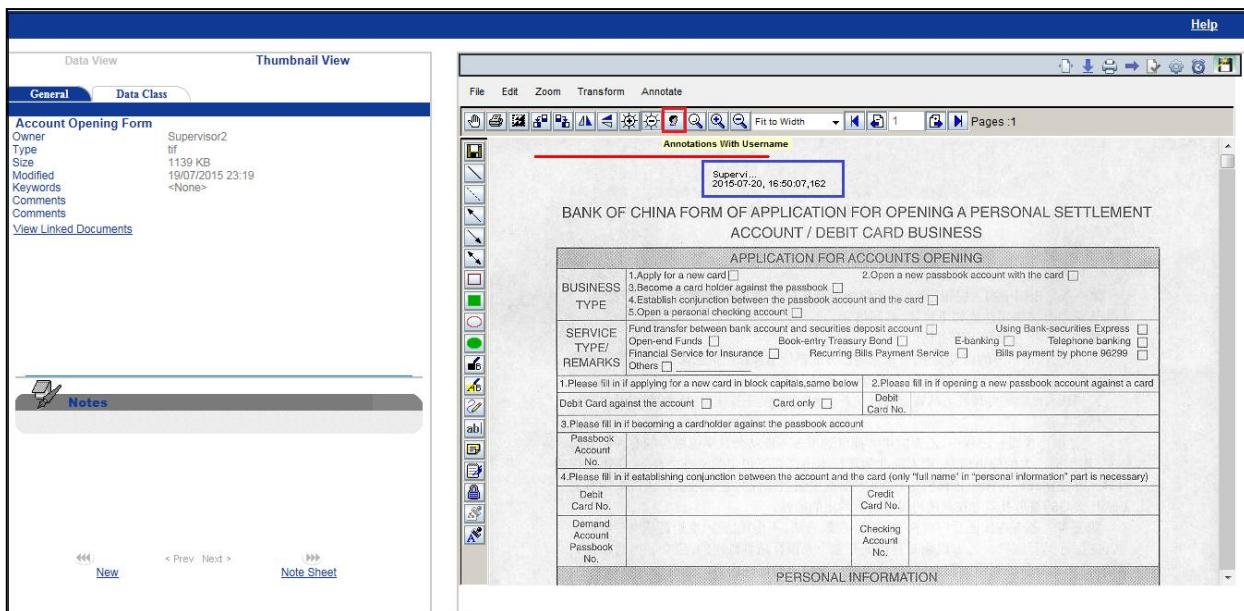


Figure: 4.17

- You can notice the user name who has applied the annotation, date and time of annotation applied on the left-hand side in the top of the document page.

-  **Zoom Lens** button displays any selected area of the document in an enlarged view:
- Click the **Zoom Lens** button; a Zoom Lens window is invoked.
 - Click anywhere in the document which needs to be viewed.

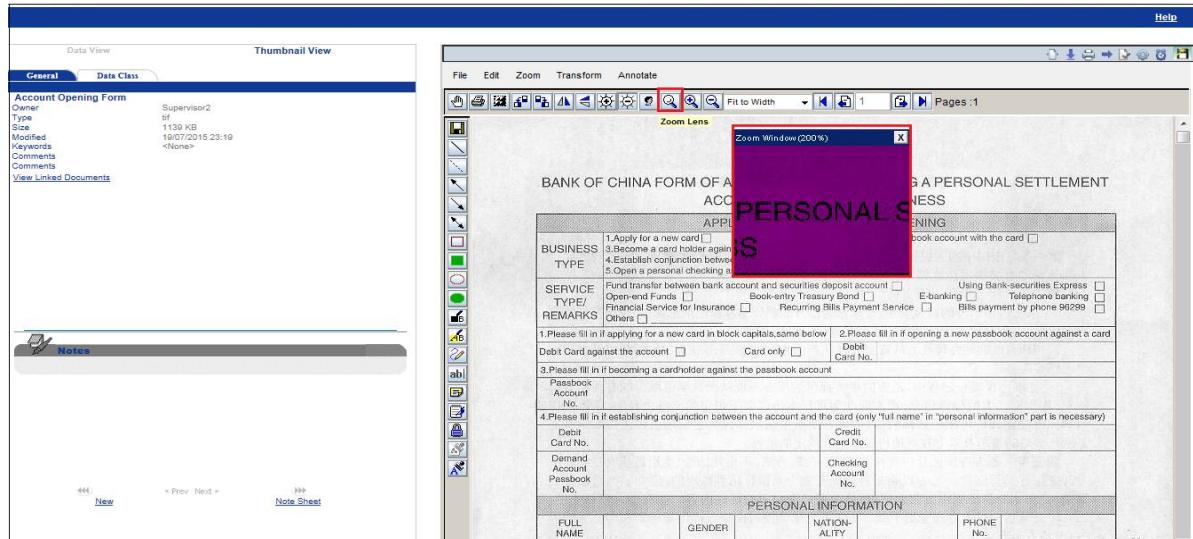


Figure: 4.18

- To close the **Zoom Window**: Click the  button.

 **Zoom In** displays the whole document in a comparatively larger size.

- Click the **Zoom In** button.
- The selected document would be displayed in a larger size.

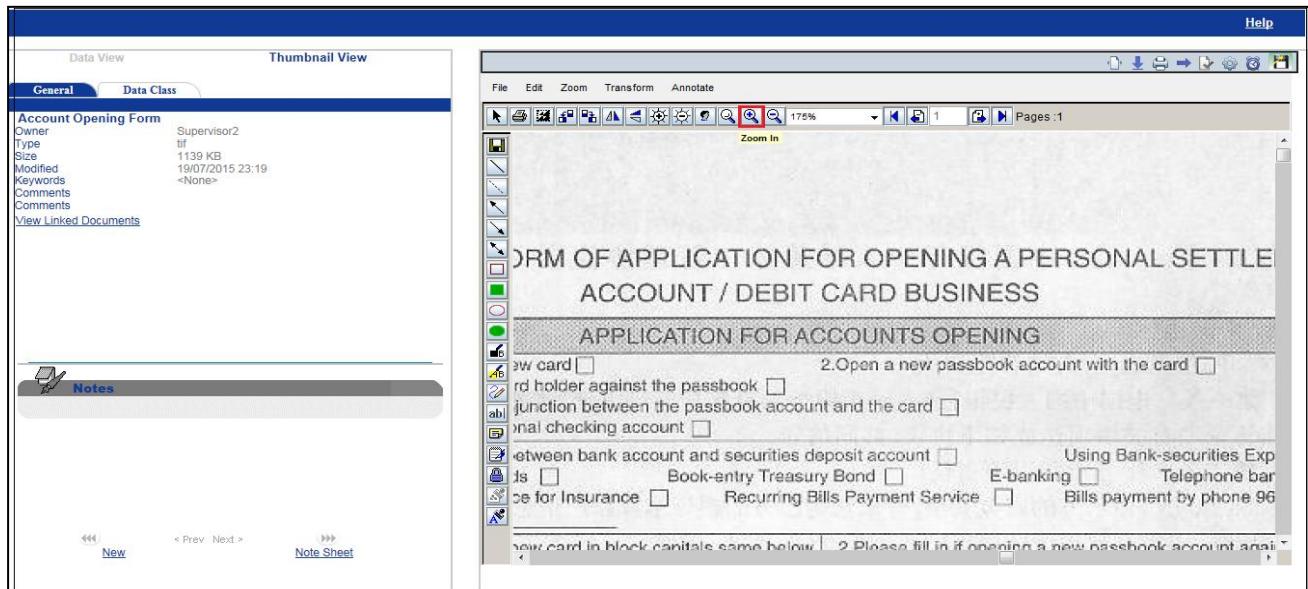


Figure: 4.19

- To increase the size of the document keep on clicking the **Zoom In** button till the required size is achieved.

 **Zoom Out** button displays the document in a smaller size.

- Click the **Zoom Out** button.

Document Viewing – Applet Viewer

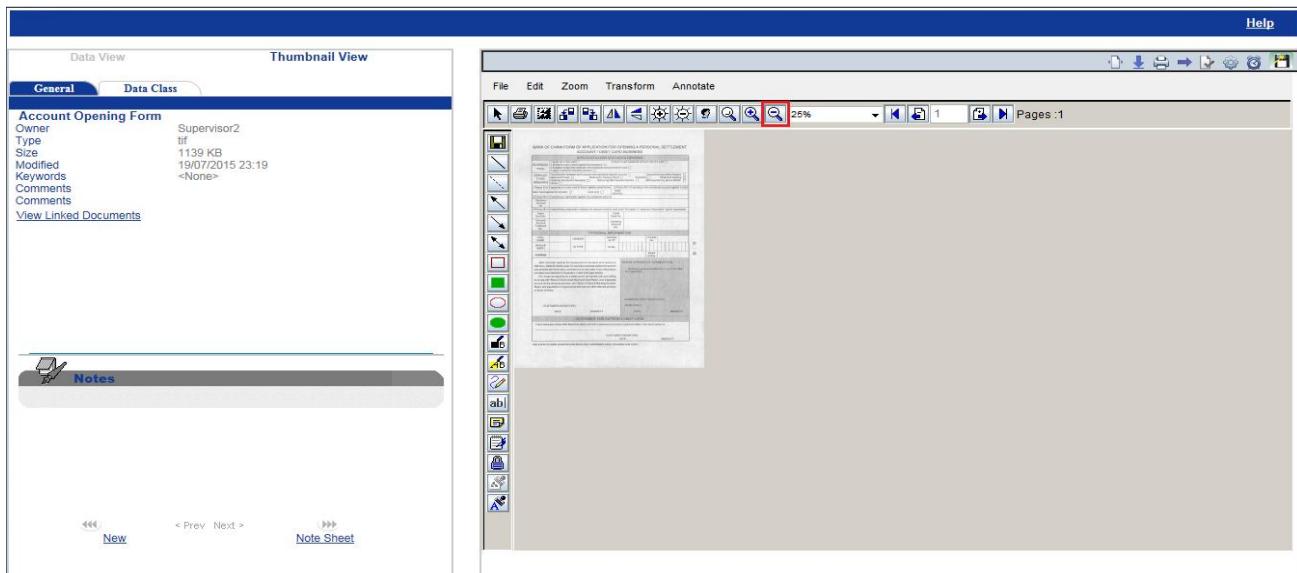


Figure: 4.20

- To reduce the size of the document keep on clicking the **Zoom Out** button till the required size is achieved.

Fit to Width button displays the document in the size of the applet.

- Click the **Fit to Width** button.
- The width of the document is increased to fit the applet area.

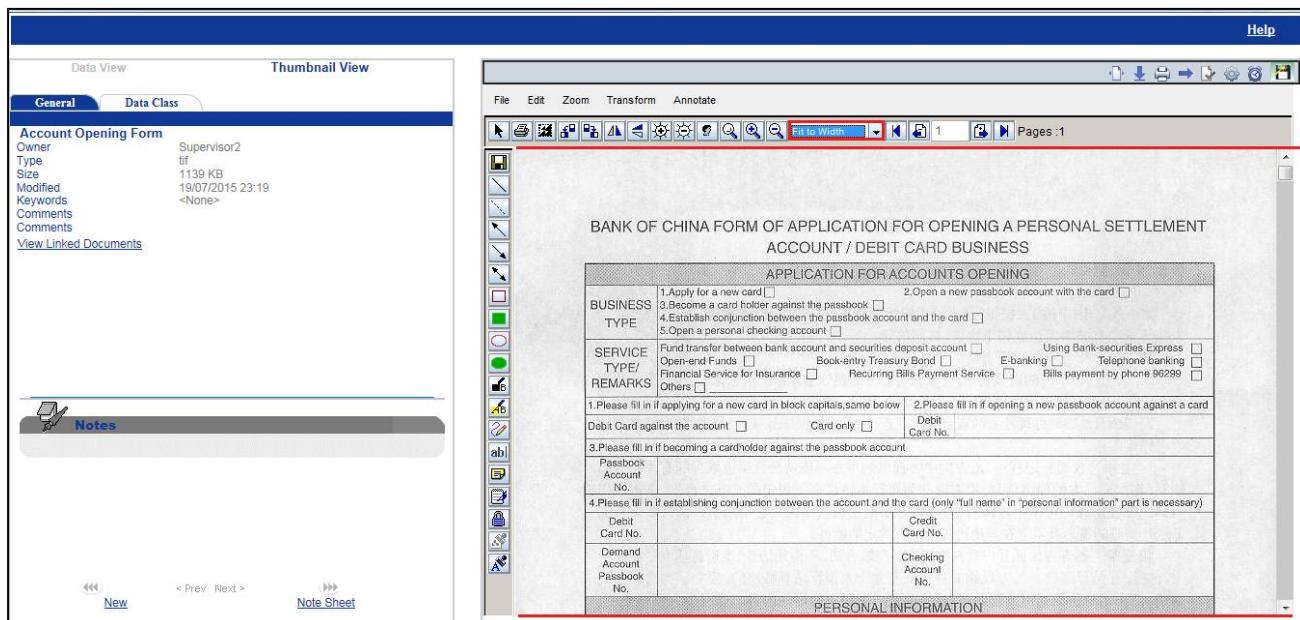


Figure: 4.21

Fit to Height button displays the document to the height of the applet.

- Click **Fit to Height** button.
- The document's height increases to that of the applet area.

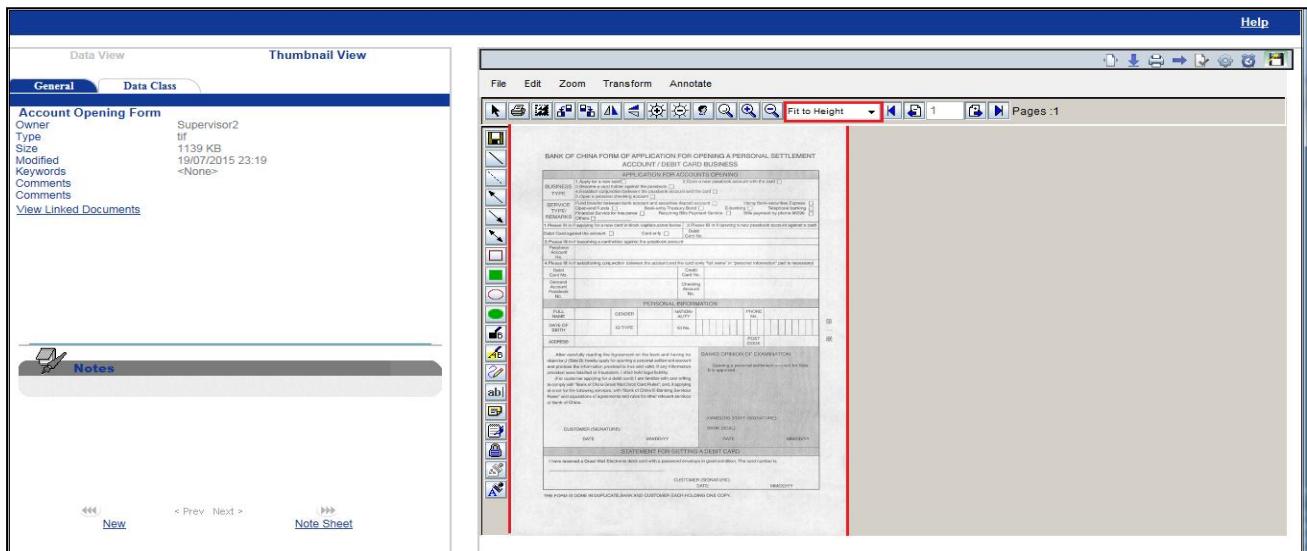


Figure: 4.22

Fit to Page button is similar to **Fit to Height** button. It displays the current page of the document in the whole of the applet area

- Click **Fit to Page** button.
- The current page of the document is displayed in the applet area.

Document Viewing – Applet Viewer

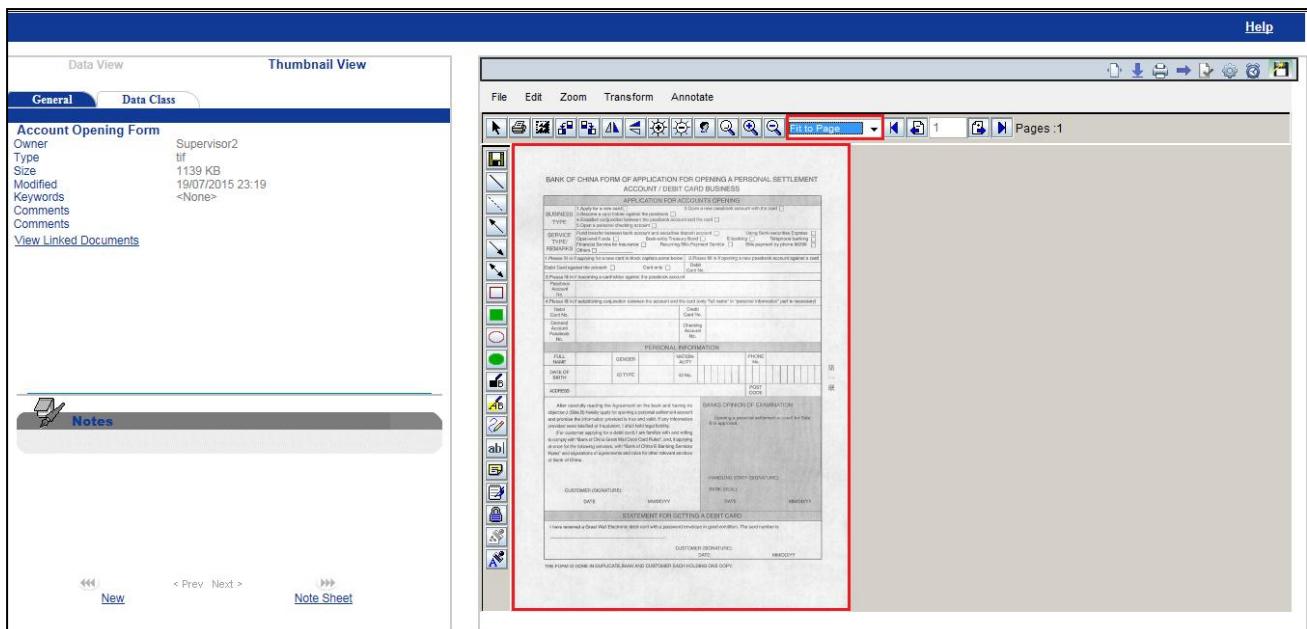


Figure: 4.23

4.1.1.2 Annotation Toolbar

 **Save Annotations** button saves the annotations applied by the user on the current document.

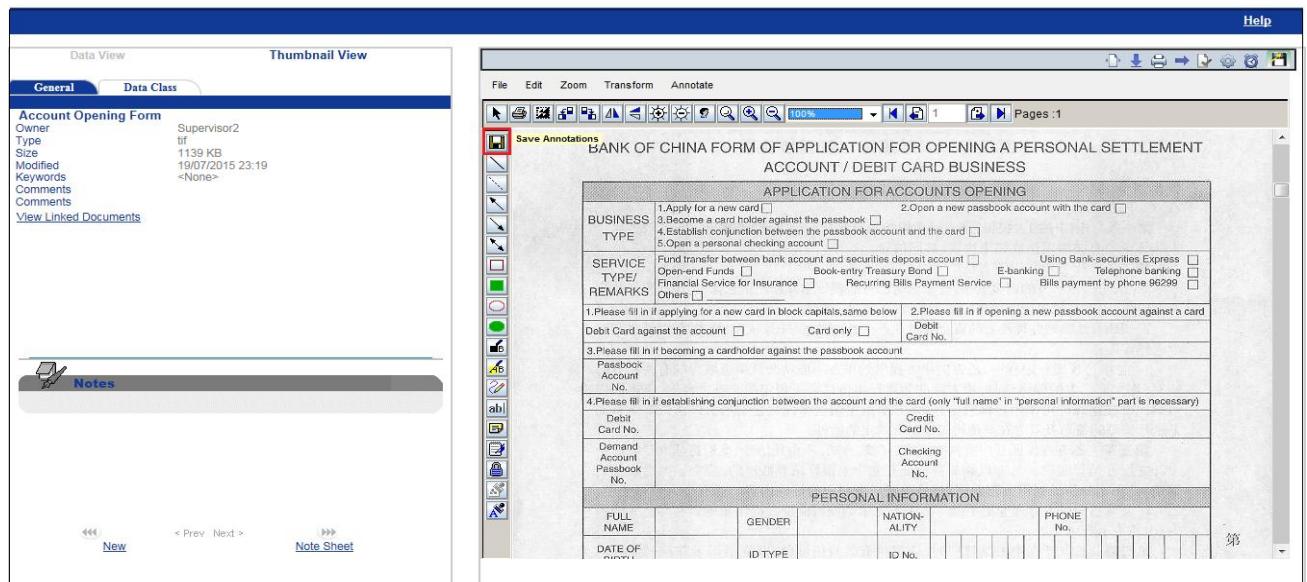


Figure: 4.24

Solid Line Drawing button helps in drawing a line. Click **Solid Line Drawing** button.

- The cursor gets changed.
- Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

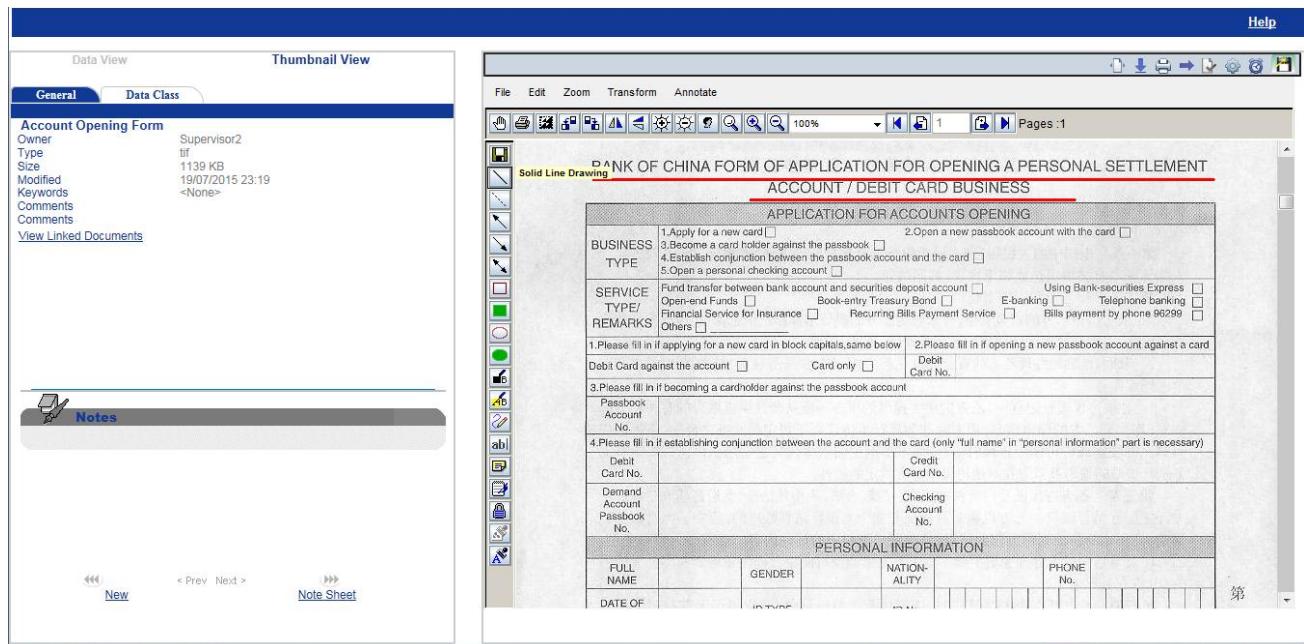


Figure: 4.25

- To change the **width** of the line, **color** of the line, and the **font**. Select the line and right click. Select the **Properties** option.
- The **Annotation Properties** dialog box appears.
- Select the width of the line from the **Pen Thickness** combo box
- Select the **color** from the different colors displayed.

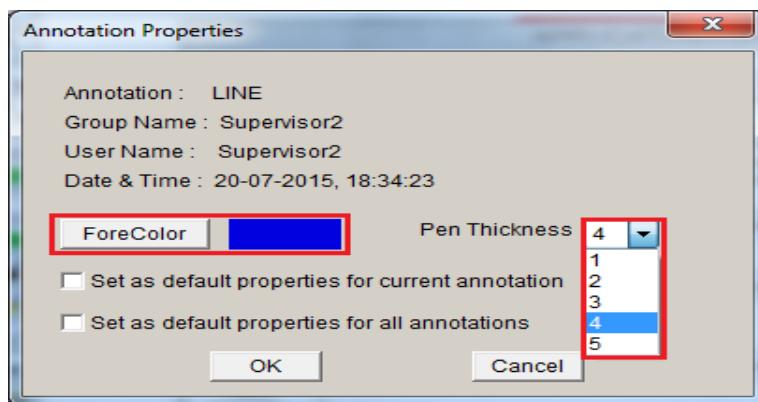


Figure: 4.26



Dashed Line Drawing button helps in drawing dashed lines.

- Click the **Dashed Line Drawing** button, the cursor gets changed.
- Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

Figure: 4.27



Leading Arrow Line Drawing button helps in drawing an arrow starting from the tip of the arrow

- Click the **Leading Arrow Line drawing** button, the cursor gets changed.
- Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

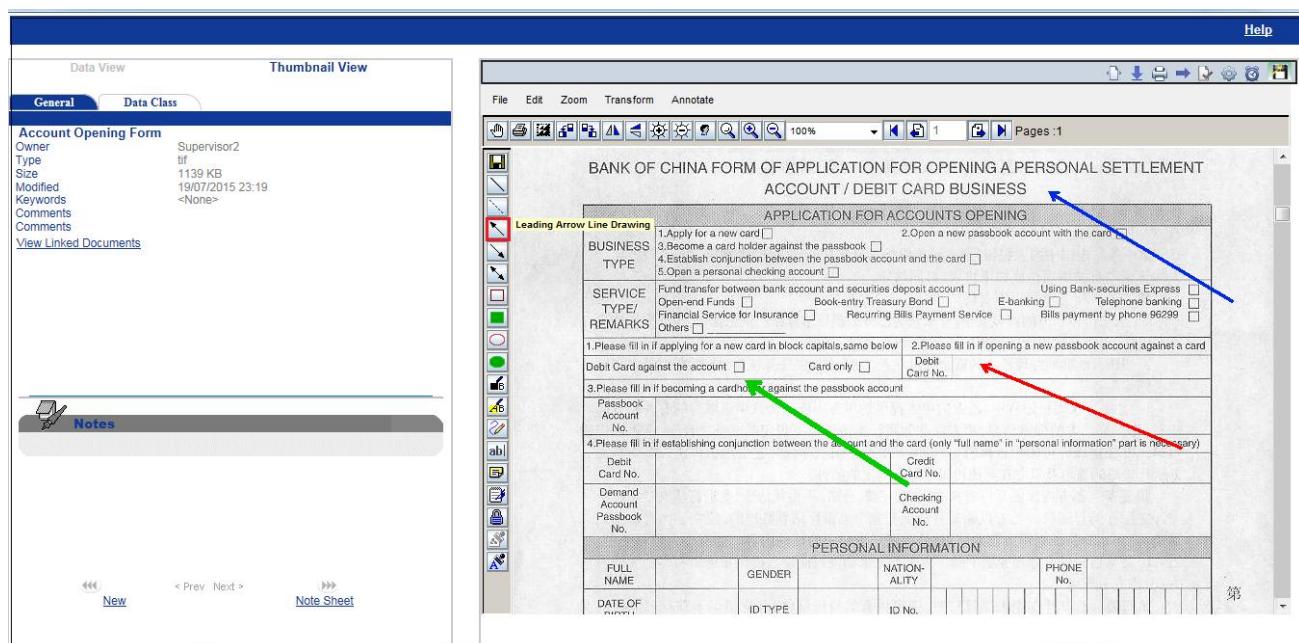


Figure: 4.28



Trailing Arrow Line Drawing button helps in drawing an arrow leaving behind a trail.

- Click the Trailing Line Arrow button, the cursor changes.
- Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

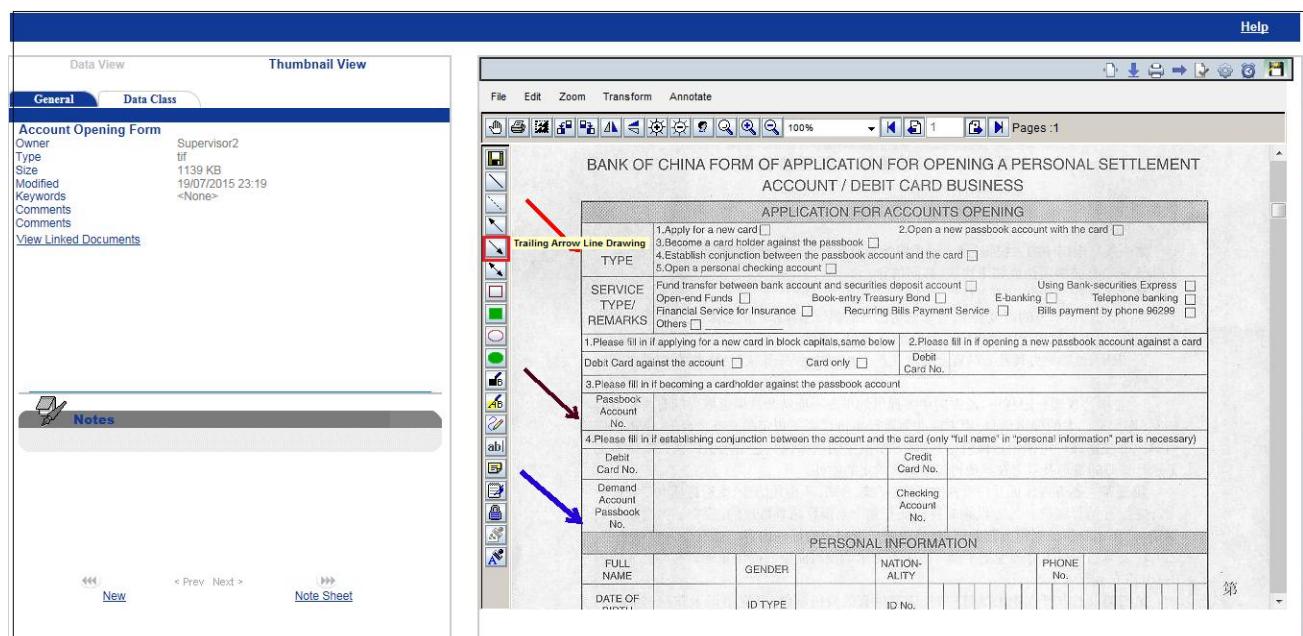


Figure: 4.29



Double Arrow Line Drawing button helps in drawing a line having arrow heads on both the sides.

- Click the **Double Arrow Line Drawing** button, the cursor changes.
- Click the cursor in the position where you want to start the line, stretch it to the position till where you want the line. Release the mouse button where you want the line to end.

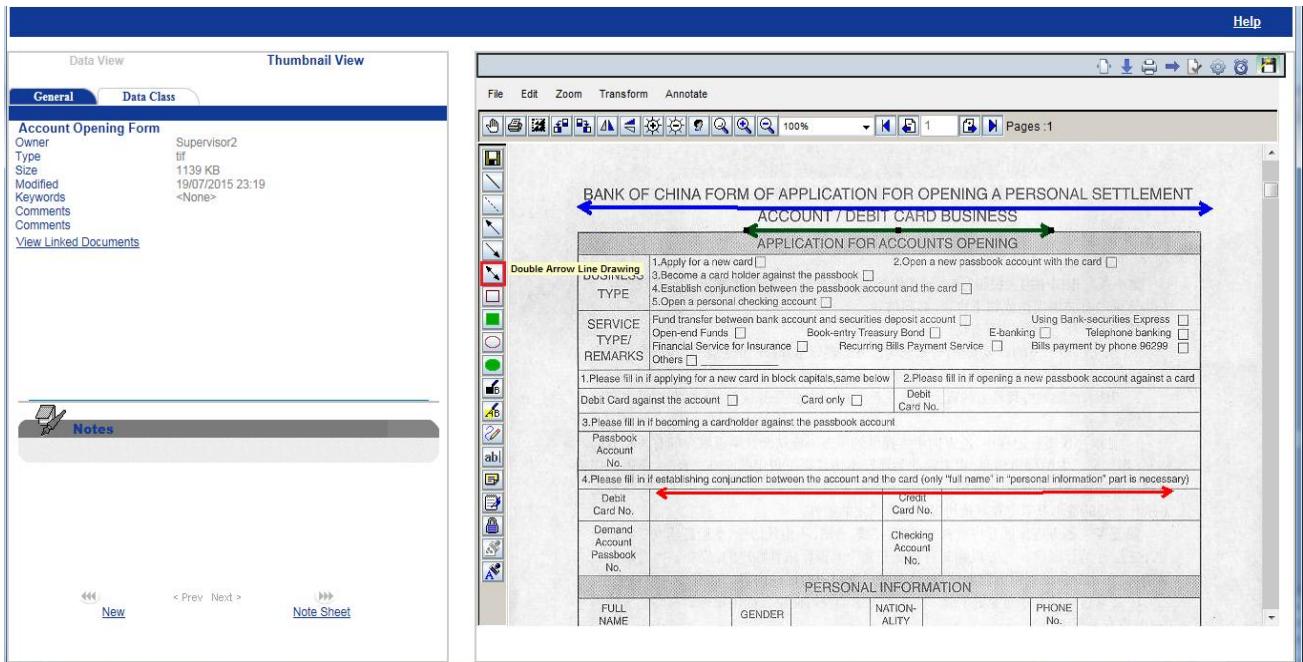


Figure: 4.30



Rectangle Drawing helps in drawing an empty rectangle.

- Click the **Rectangle Drawing** button, the cursor changes.
- Click the cursor in the position where you want to the rectangle to start and drag it to the point till where you want the rectangle to end.(Refer [Figure 4.31](#))



Solid Rectangle Drawing button helps in drawing a filled rectangle.

- Click the **Solid Rectangle Drawing** button, the cursor changes.
- Click the cursor in the position where you want to the rectangle to start and drag it to the point till where you want the rectangle to end. (Refer [Figure: 4.32](#))

Document Viewing – Applet Viewer

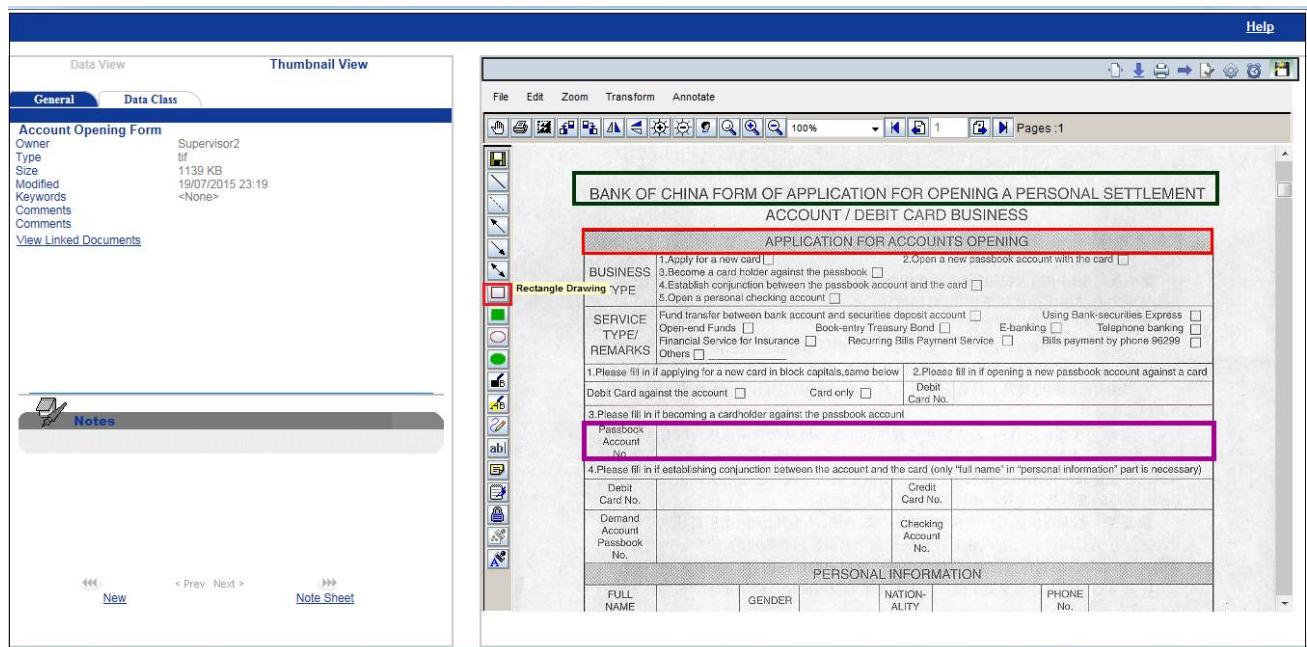


Figure: 4.31

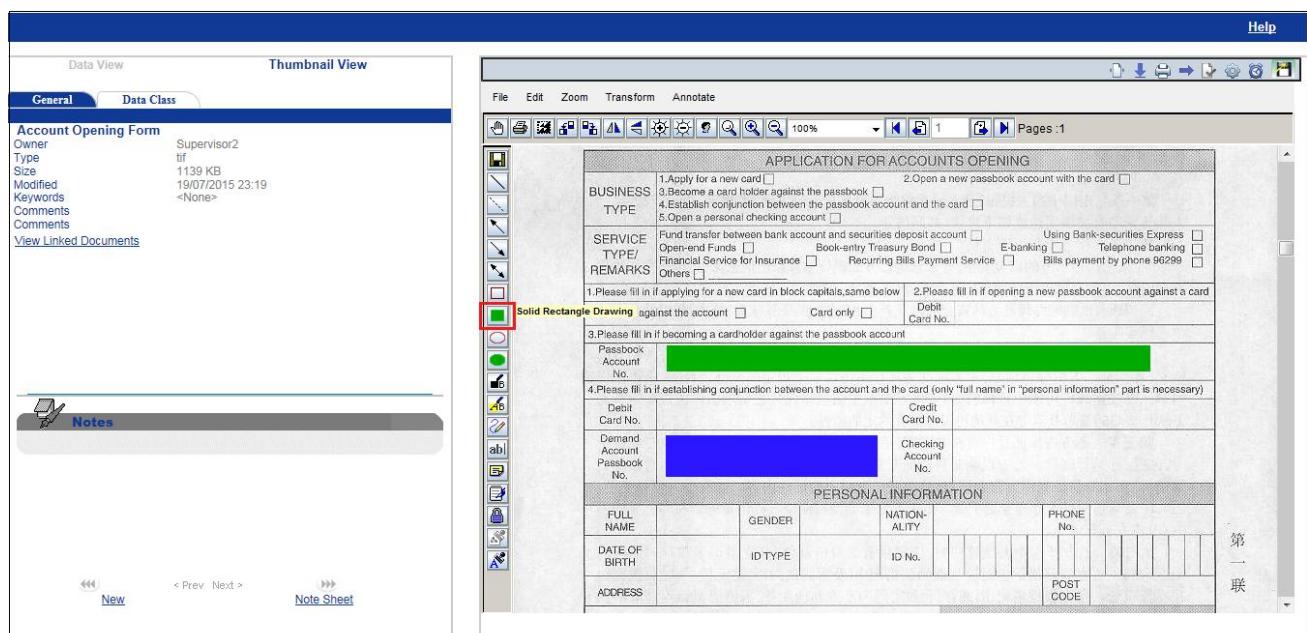


Figure: 4.32



Ellipse Drawing button helps in drawing an empty ellipse.

- Click the **Ellipse Drawing** button, the cursor changes.
- Click the cursor in the position where you want the ellipse to start and drag it to the point till where you want the ellipse to end.

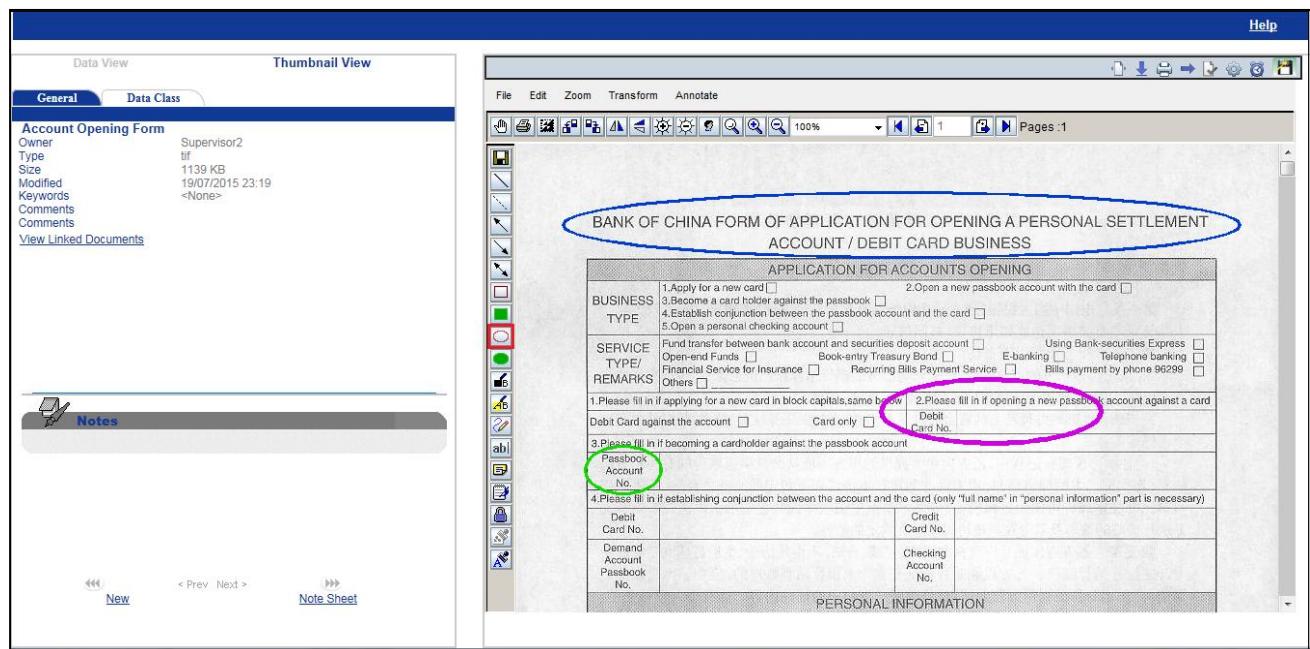


Figure: 4.33



Solid Ellipse Drawing button helps in drawing a filled ellipse.

- Click the **Solid Ellipse Drawing** button, the cursor changes.
- Click the cursor in the position where you want to the ellipse to start and drag it to the point till where you want the ellipse to end.

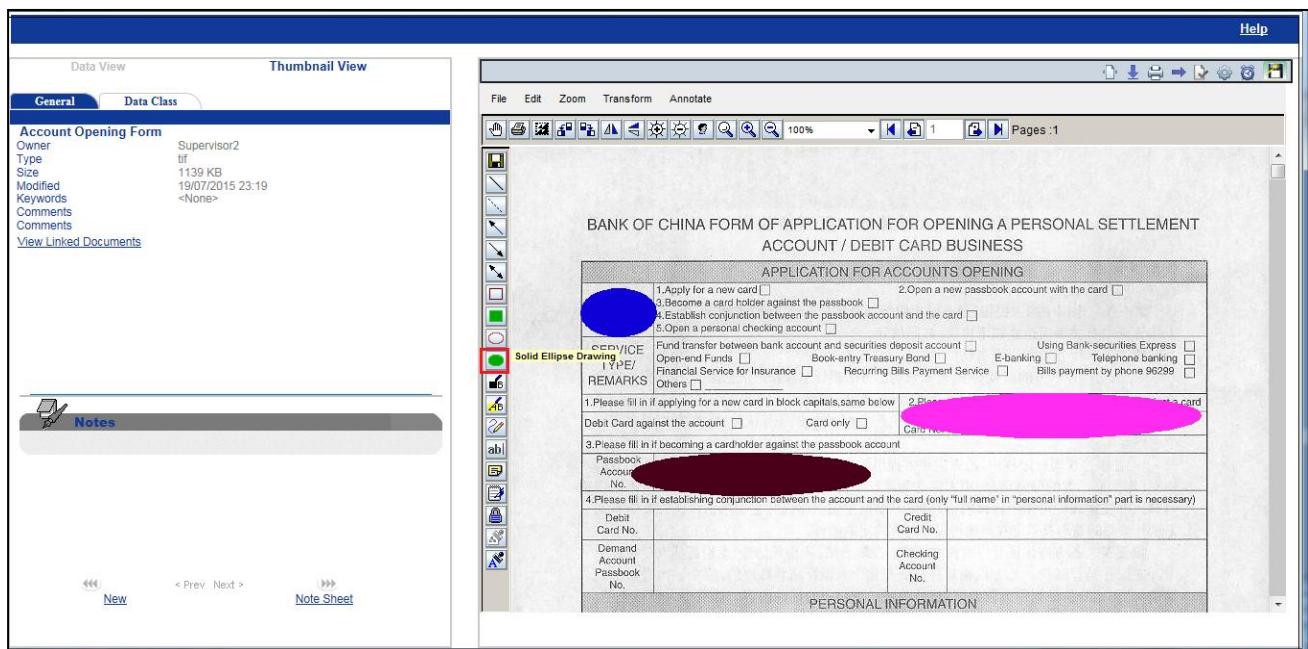


Figure: 4.34

 **Wipe Out Drawing:** This Annotation feature helps in wiping out some part of the image using a black or white Rectangle.

- Click the **Wipe Out drawing** button, the cursor changes.
- Click the cursor in the position where you want to start the drawing and drag it to the point till where you want it.

Document Viewing – Applet Viewer

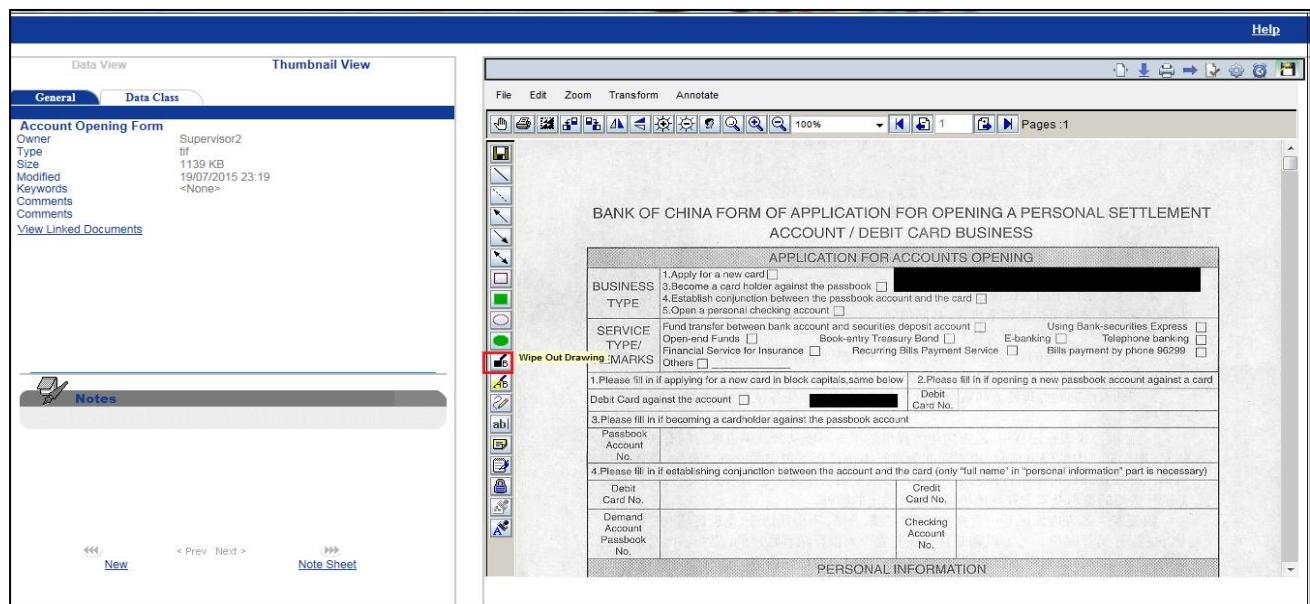


Figure: 4.35

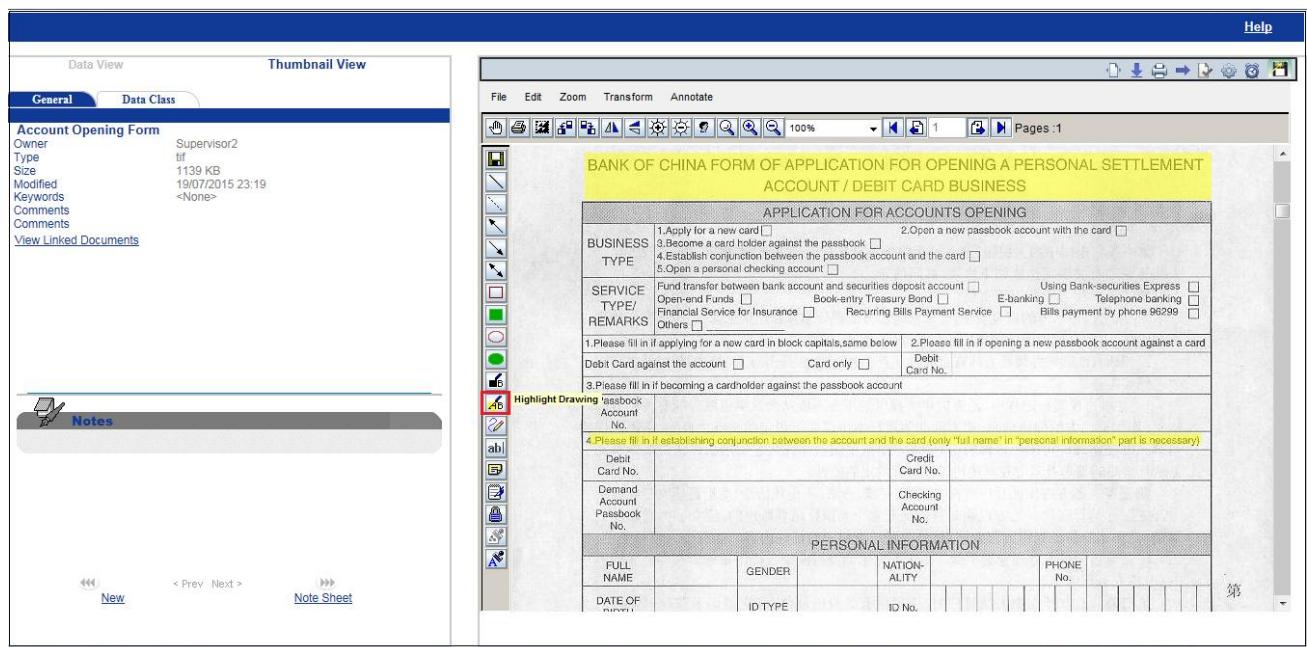


Figure: 4.36



Highlight Drawing button helps in highlighting the selected text.

- Click **Highlight Drawing** button, the cursor changes.
- Click the cursor from the start point of the text and drag it to the point till where you want the text to be highlighted. (Refer [Figure : 4.36](#))



Free Hand Drawing button: It helps the user to perform free hand drawing over the document.

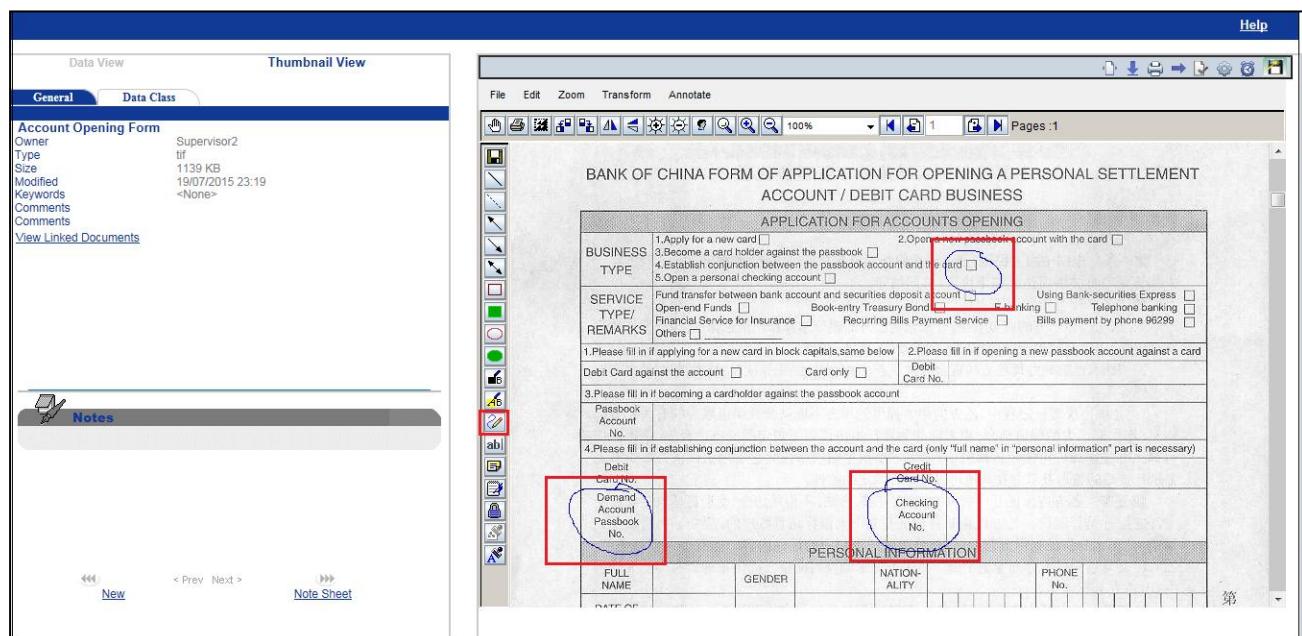


Figure: 4.37



Insert Text button helps in inserting text in the documents wherever required.

- Click the **Insert Text** button, the cursor changes.
- Click the cursor where you want the text to be inserted, and release the cursor. As the user begins inserting text, the textbox increases on its own. (Refer [Figure: 4.38](#))



Sticky Note button helps in sticking note text in the documents wherever required.

- Click the **Sticky Note** button, the cursor changes.
- Click on the document where you want to stick the note. As the user begins inserting text, the textbox increases on its own. (Refer [Figure: 4.39](#))

Document Viewing – Applet Viewer

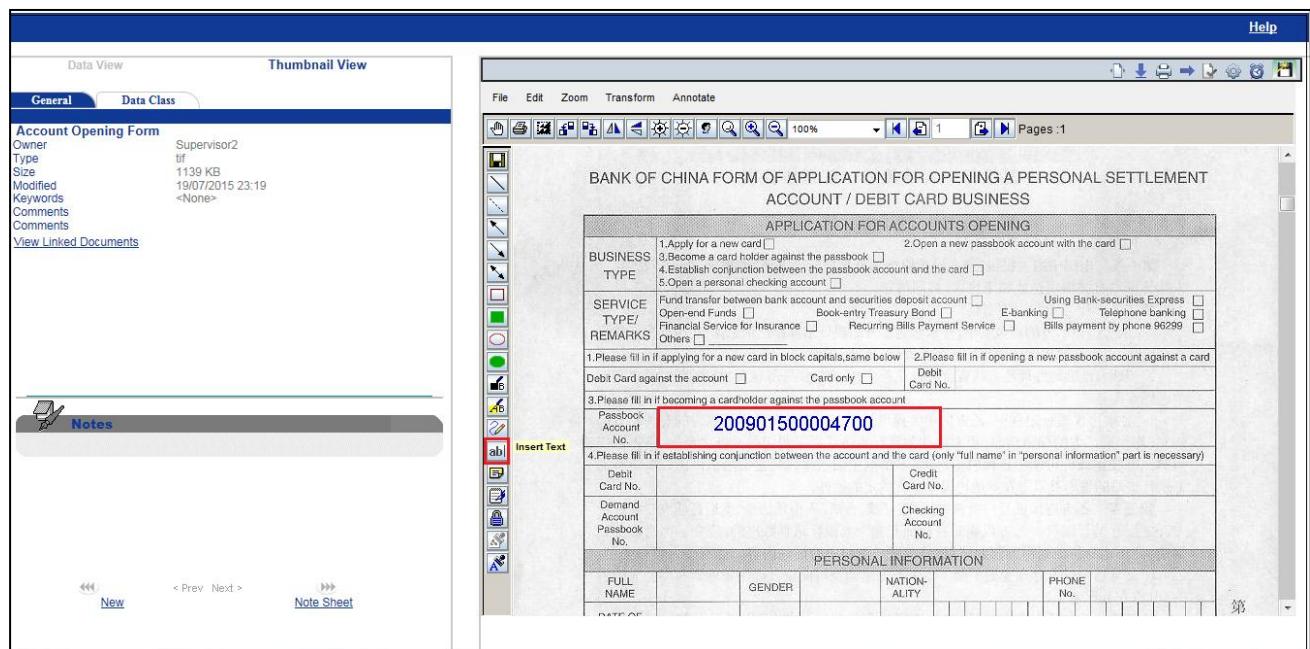


Figure: 4.38

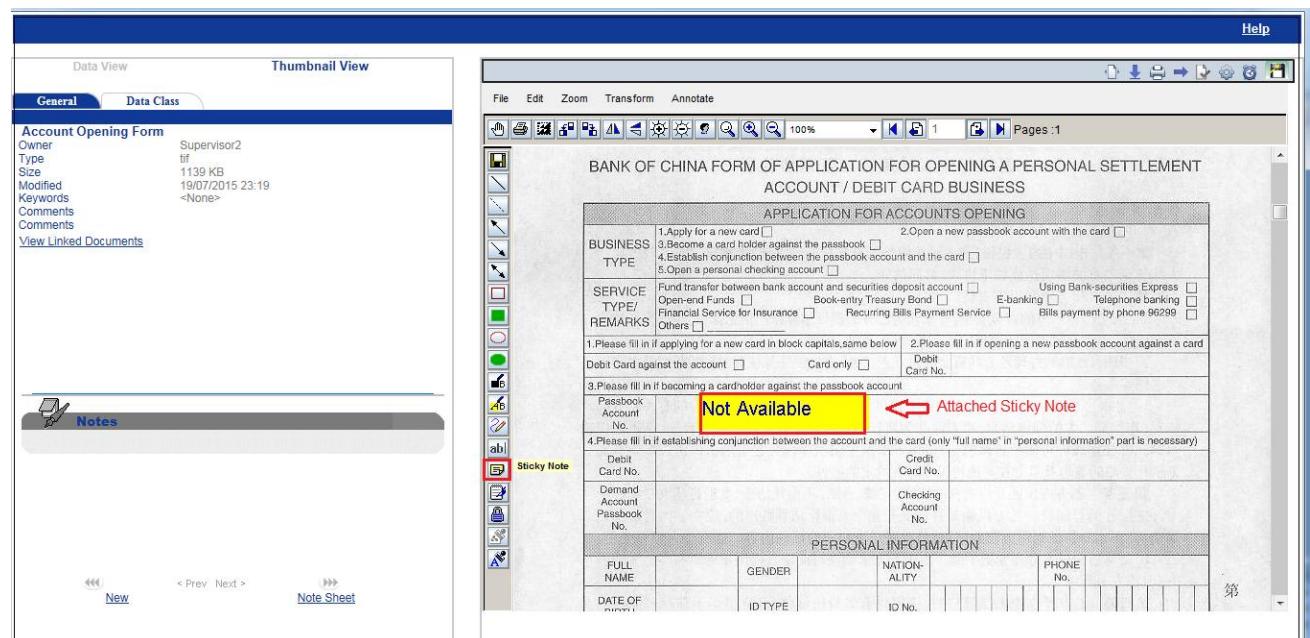


Figure: 4.39



Attach a Note button helps in attaching note text with the documents.

- Click the **Attach a Note** button, the cursor changes.
- Click on the document. A **Note** Dialog box opens. Write the note, and click **OK** to save it. Or, click **Cancel** to close the dialog box, without making any changes.

Document Viewing – Applet Viewer

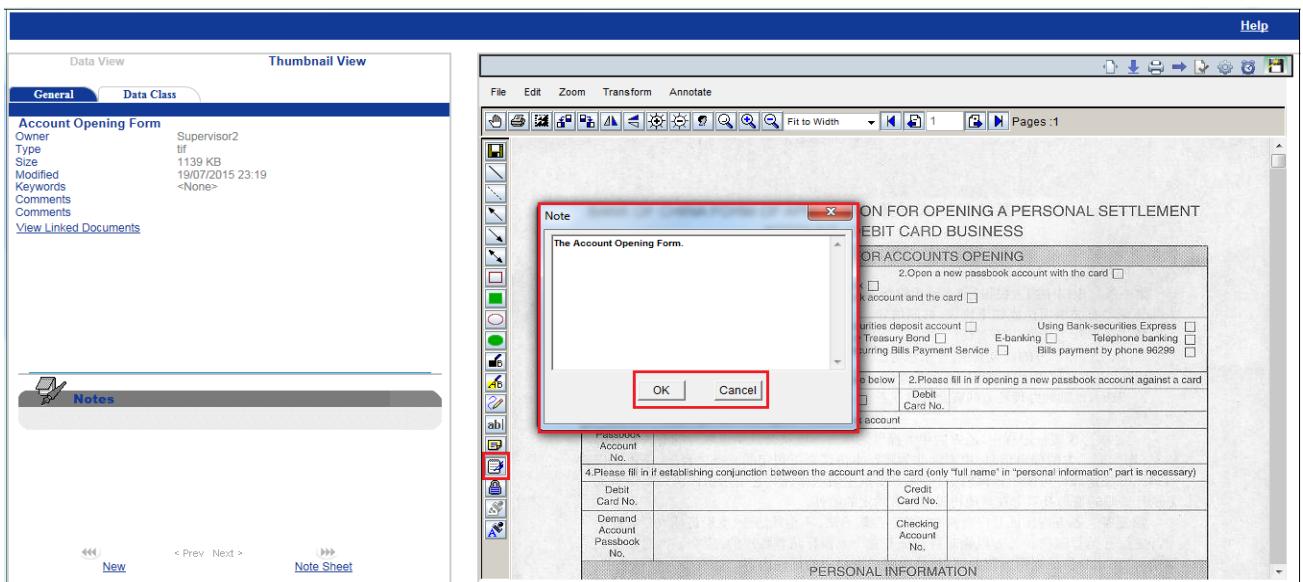


Figure: 4.40

- The attached NOTE appears as shown in the following screen

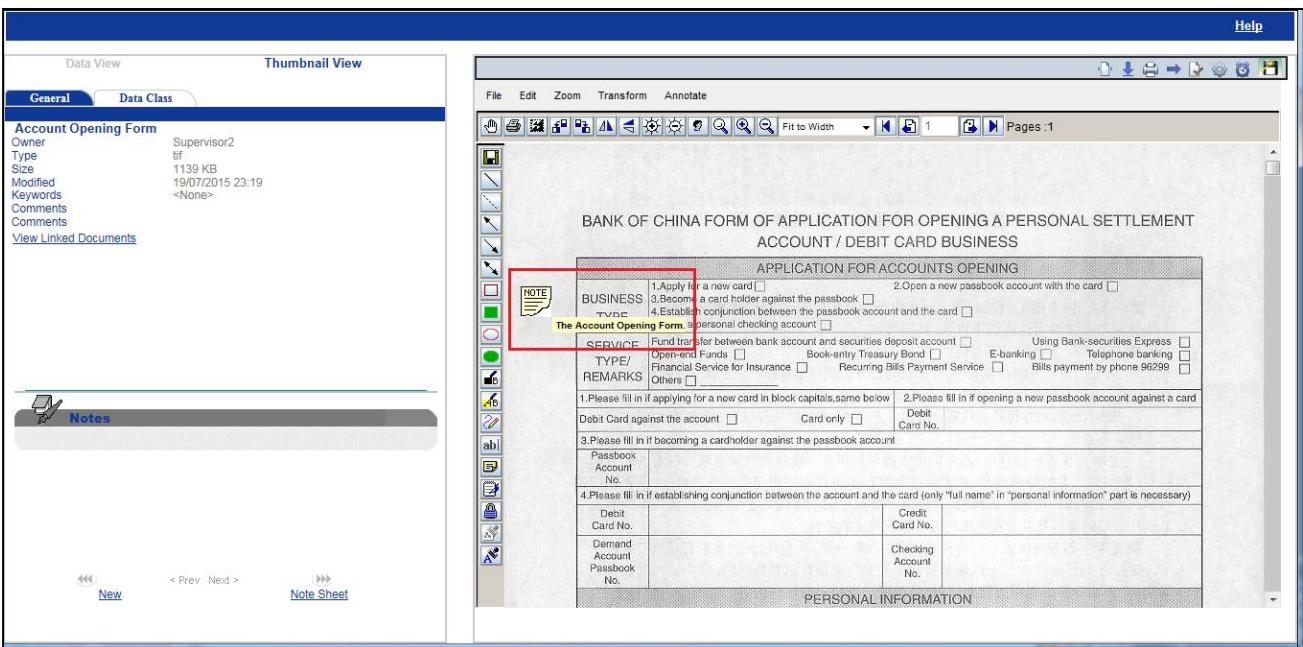


Figure: 4.41

 **Secure Annotation:** The ImageView Applet in which image documents are viewed from OmniDocs Web, is a multi-user compatible. As many users can access, view and modulate

the images according to their requirements. Annotation Groups have been added as a security feature. Groups imply that the applied annotations can be stored under a common heading or headings. Once these groups are created, the administrator can define different levels of rights on various groups to different users.

To **secure annotations** follow the following steps:

- Click **Secure Annotation** button. The following screen gets invoked. By default, all groups defined will possess **inherited** rights.

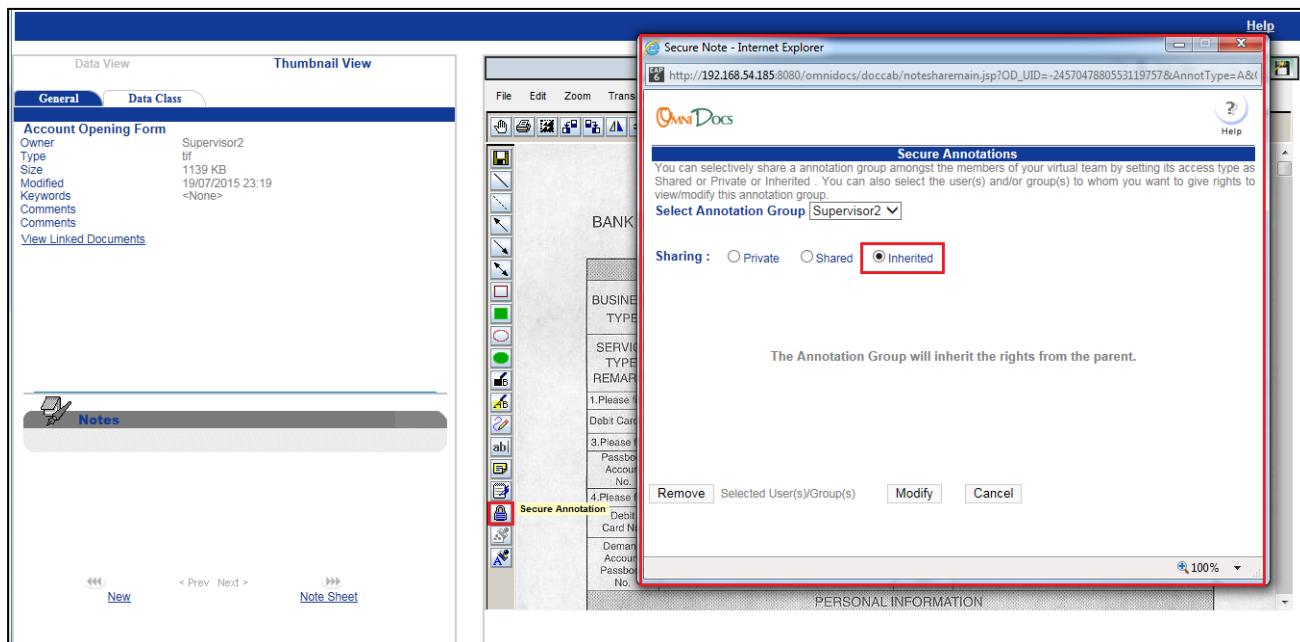


Figure: 4.42

- To assign Private rights to the group, select the **Private** option. The following screen gets invoked.

Document Viewing – Applet Viewer

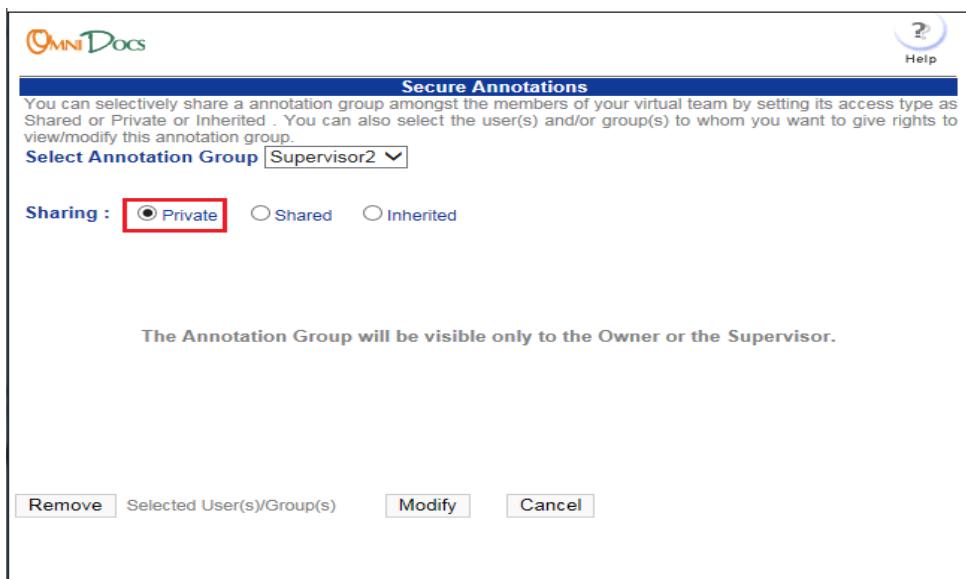


Figure: 4.43

- To assign shared rights on the group, select the **Shared** option. The following screen gets invoked.
- Select the **Group(s)**, **User(s)** and define the **Roles(s)** for sharing.
- Click **Modify** to save the changes made.
- Click **Cancel** to close the Annotation Sharing window without saving the changes made.

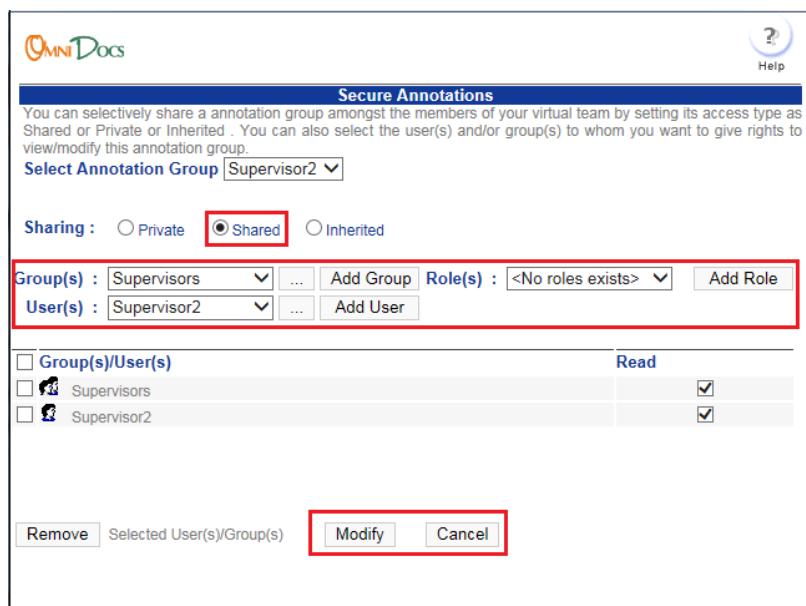


Figure: 4.44

NOTE:

To allot rights on different annotation groups, the user must have the privilege of Assign Rights which is set from the OmniDocs Administration.

To assign rights on annotation groups, the user should either be a supervisor/owner of the document, or should have Modify rights on the document.



Stamps are image annotations, which will be available for applying on image documents once they are registered in OmniDocs. The usage of stamps is divided into two steps, **registration/un-registration** of stamp images and applying registered stamps on the image documents.

Registration and un-registration of stamps can be done from OmniDocs's Admin application.

Applying registered stamps on an image document:

- Click the second last button in the vertical toolbar to enable the stamp available dialog box for selecting the stamp to be applied in the image document.
- Click the **drop-down** arrow to select the stamp to be applied to the document and click the **OK** button.

Document Viewing – Applet Viewer

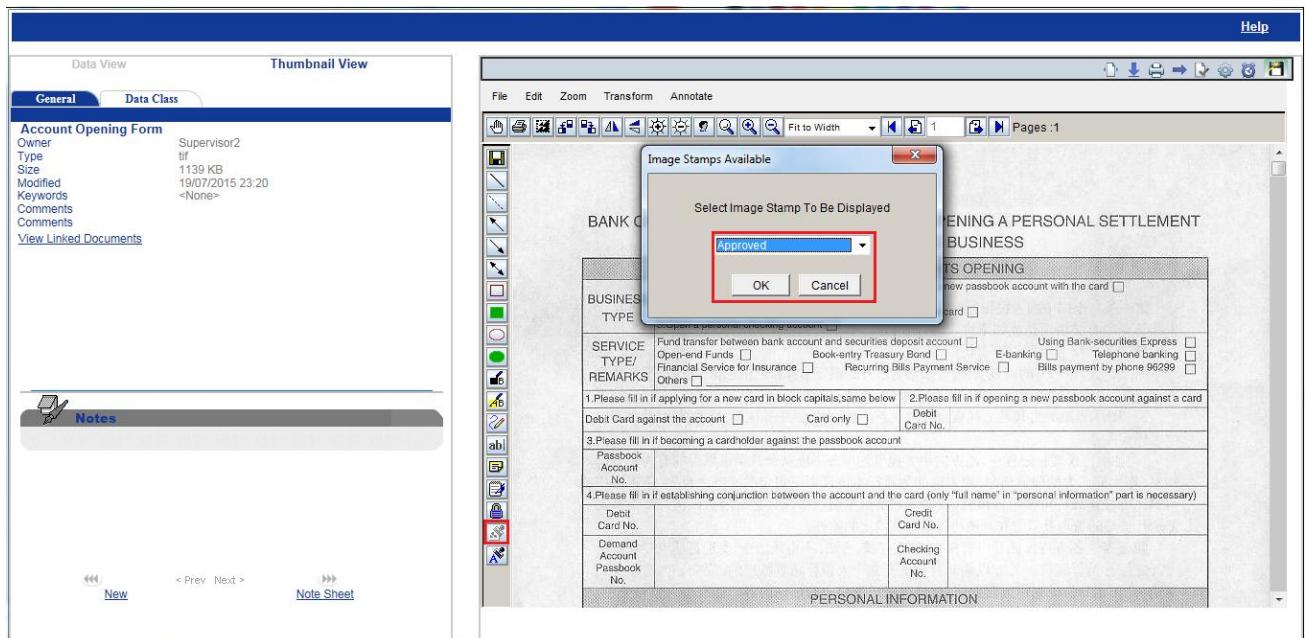


Figure: 4.45

- The selected stamp is visible on the document and click the **Save** button to save the stamp on the image document.

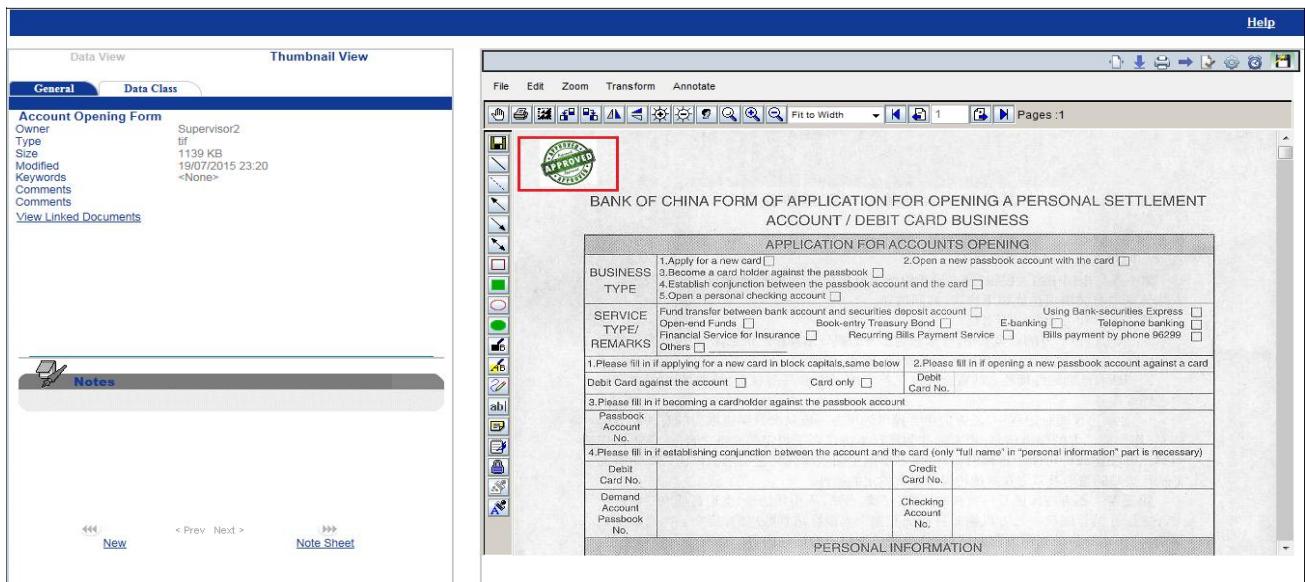


Figure: 4.46

Applying Image Stamps to the Documents

Stamps are image annotations, which will be available for applying on image documents once they are registered in OmniDocs. The usage of stamps is divided into two steps: registration/un-registration of stamp images and applying registered stamps on the image documents.

Registration and unregistration of Image Stamp can be done from OmniDocs's Admin application. (**Refer: OmniDocs 9.1 Administration Manual**)

Registration and unregistration of Text Stamp can be done by making changes in OmniDoc's INI file. (**Refer: OmniDocs 9.1 Configuration Manual**)

NOTE:

- Only **.tif** files are allowed to be registered for stamping in the document.
 - **Text stamps** can also be applied to the image document by executing the same sequence of above steps
-

Adding Notes to Documents

The feature of adding notes to documents is provided in AppletViewer.

To add notes to a document, follow the following steps:

- Click **New** command button and specify note.

Document Viewing – Applet Viewer

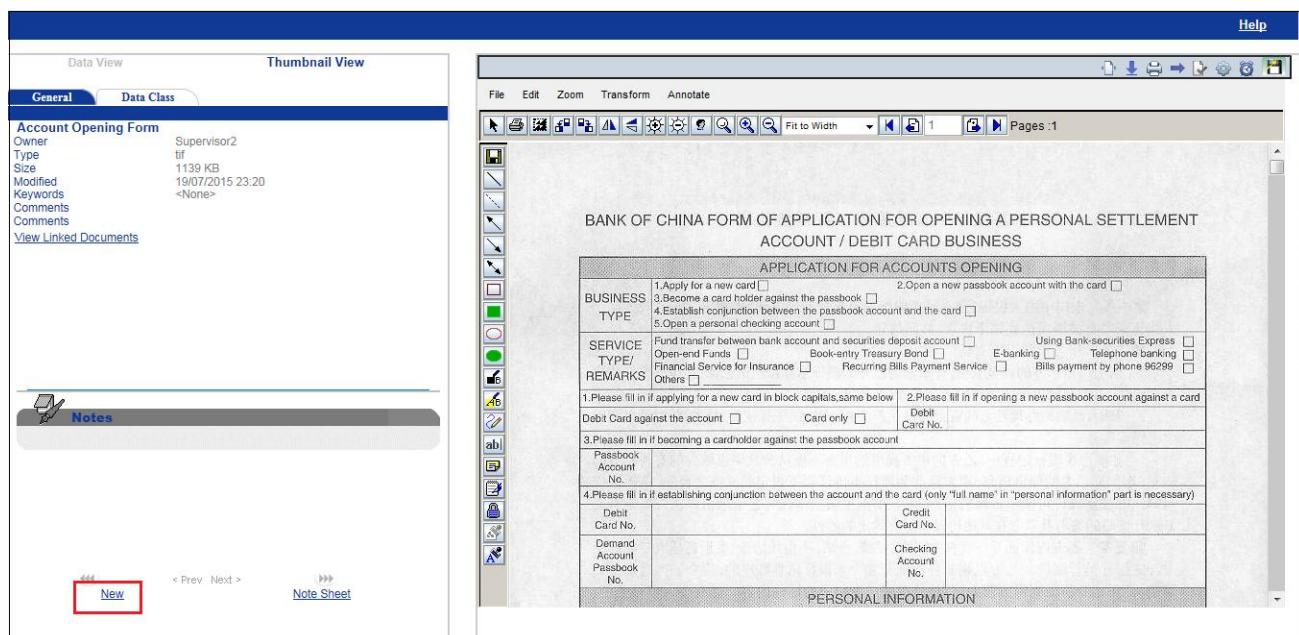


Figure: 4.47

- This Command button is a toggle between **New** and **Cancel**. “New” button allows assigning the Notes. **Cancel** button allows closing the dialog box without assigning the notes.
- To save the note along with the document: click **Save** command button.

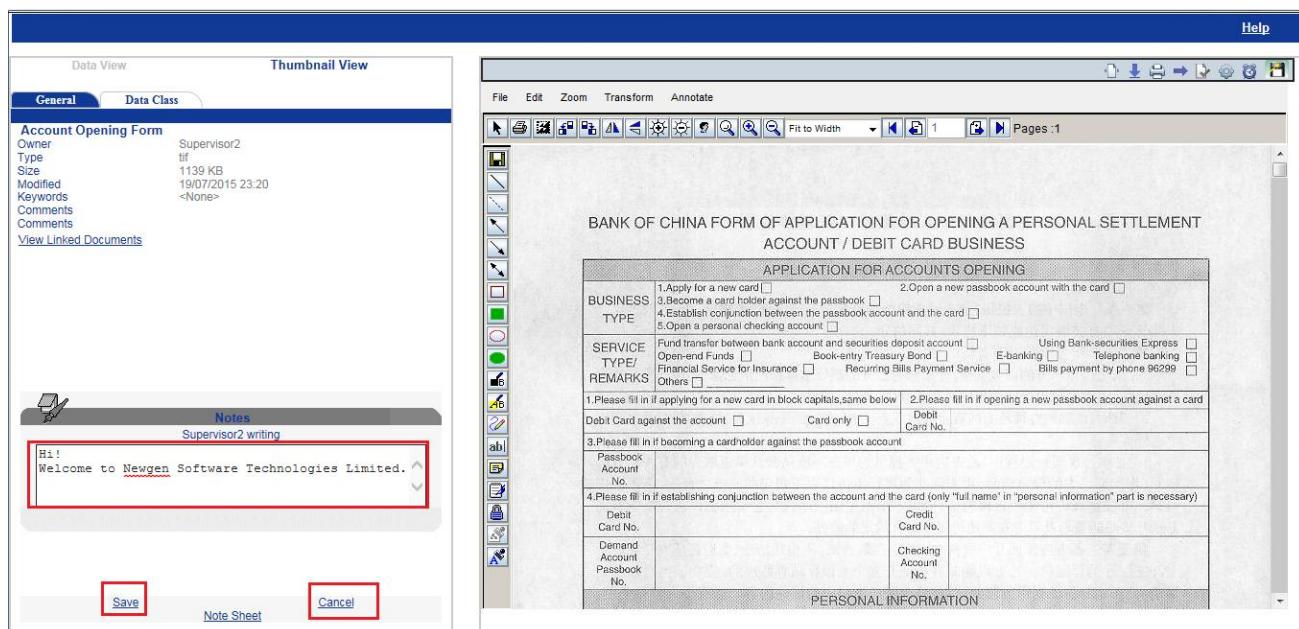


Figure: 4.48

- This command button is again a toggle between **Save** button and **Secure** button. “Secure” button allows assigning rights on the notes in order to secure the attached notes with document. “Save” button allows saving the note along with the specified rights.
- To browse the next and previous notes attached to a document, click the respective arrows.

Note Sheet

“Note Sheet” is a feature, which is provided in the View Menu of AppletViewer. Notesheet displays all the notes attached to a document by any user. You can view all the notes attached to a document by either a particular user or all users by selecting from View Notes of User combo box.

6. Click **Note Sheet** link, to invoke note sheet screen

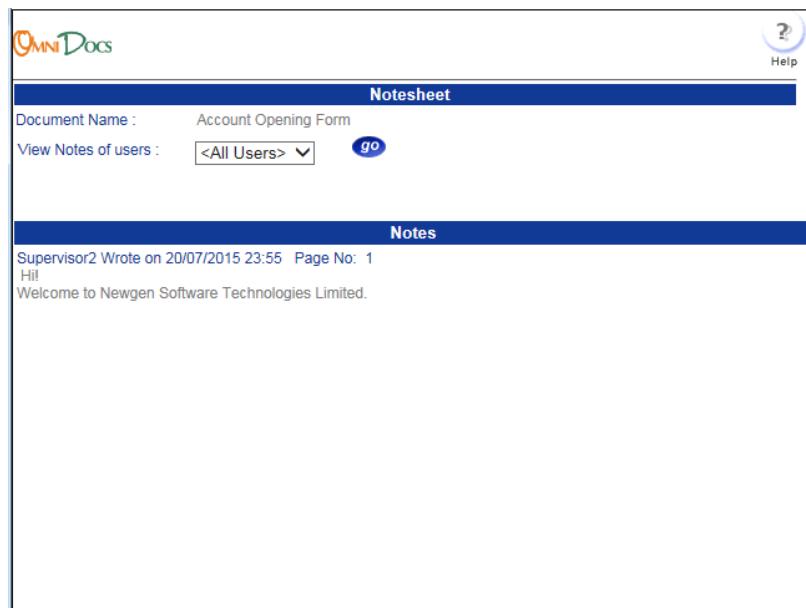
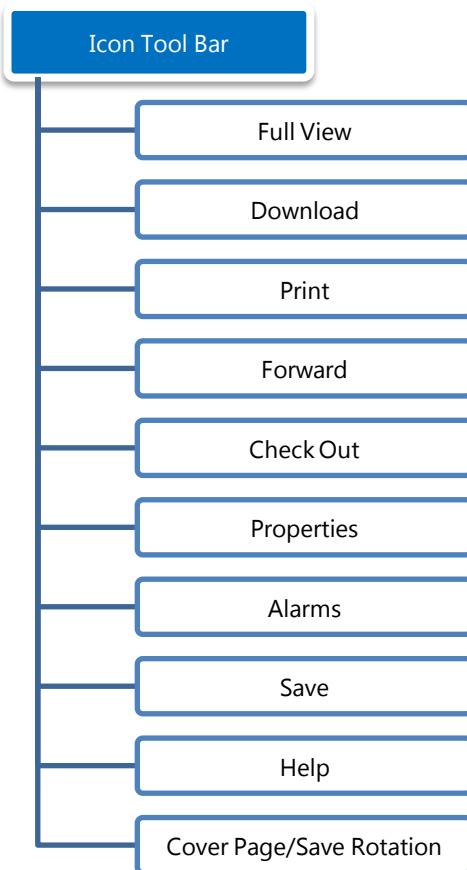


Figure: 4.49

4.1.2 Icon Tool Bar

The screen has a Icon toolbar as well. The Icon toolbar consists of the following components:



1. Full View:

- a. Click the **full View** button in the icon tool bar.
- b. **Full View** Displays the document in full view. “Full View” of the document is shown in the following screen.

Document Viewing – Applet Viewer

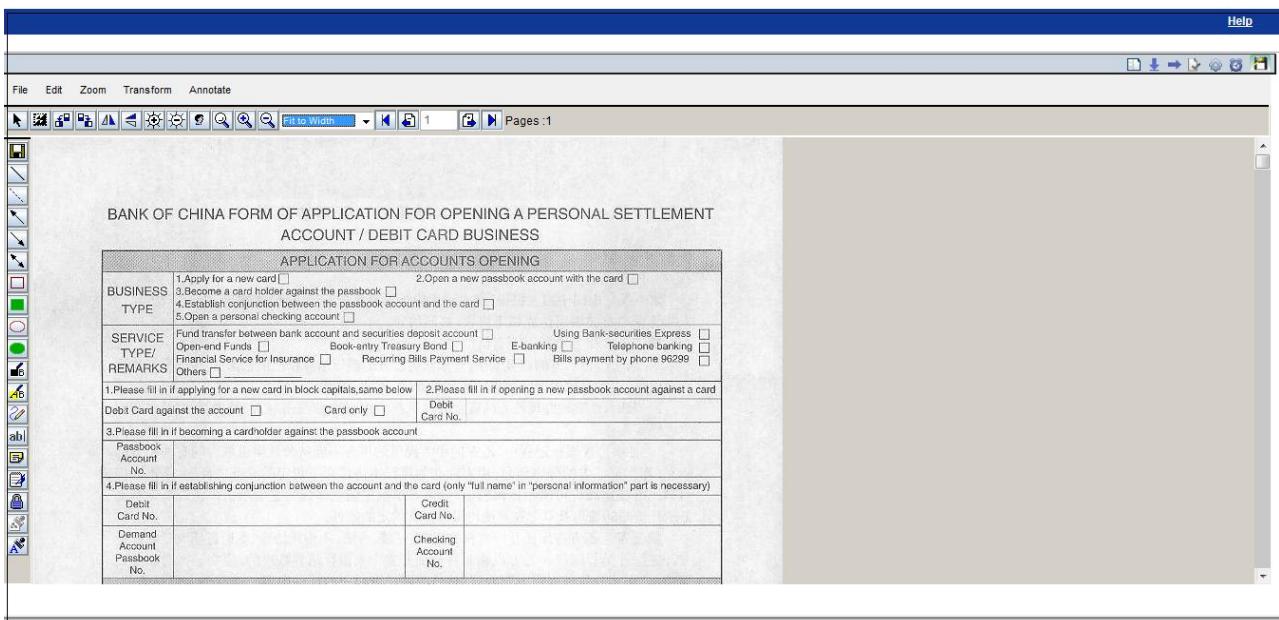


Figure: 4.50

2. Download:

- Download button downloads the document directly. Click the **Download** button.
- The Download message box appears, click **Save** to download.

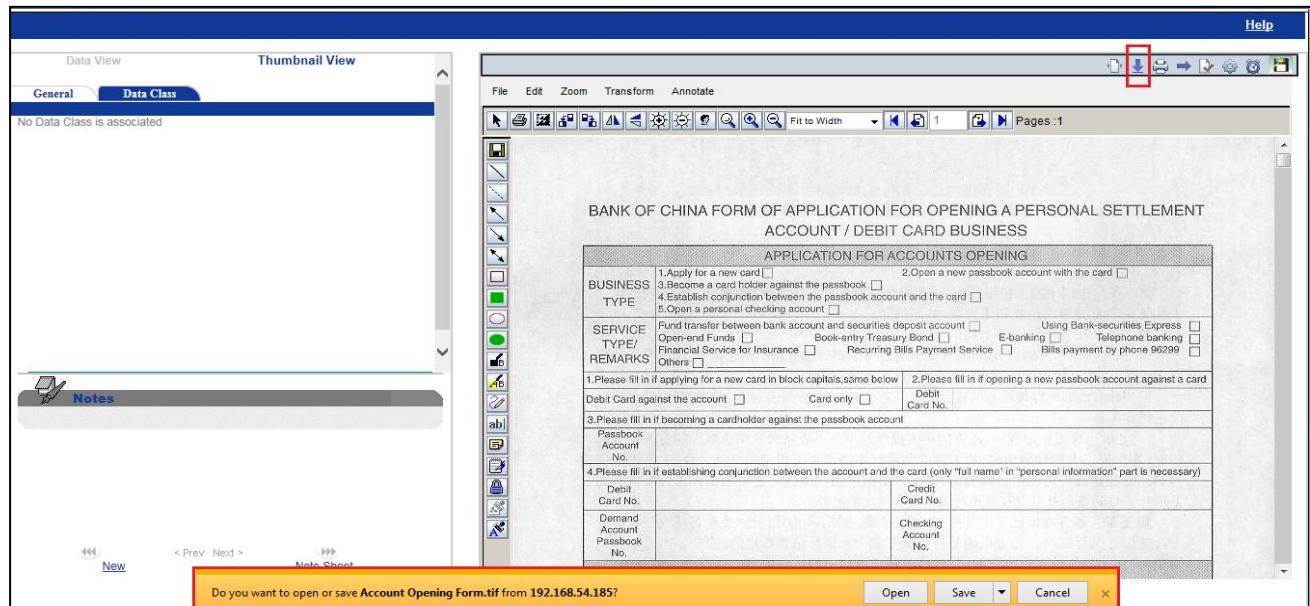


Figure: 4.51

3. Print

- a. Click **Print** button to print the opened document.
- b. A security message appears, click **OK** to print.

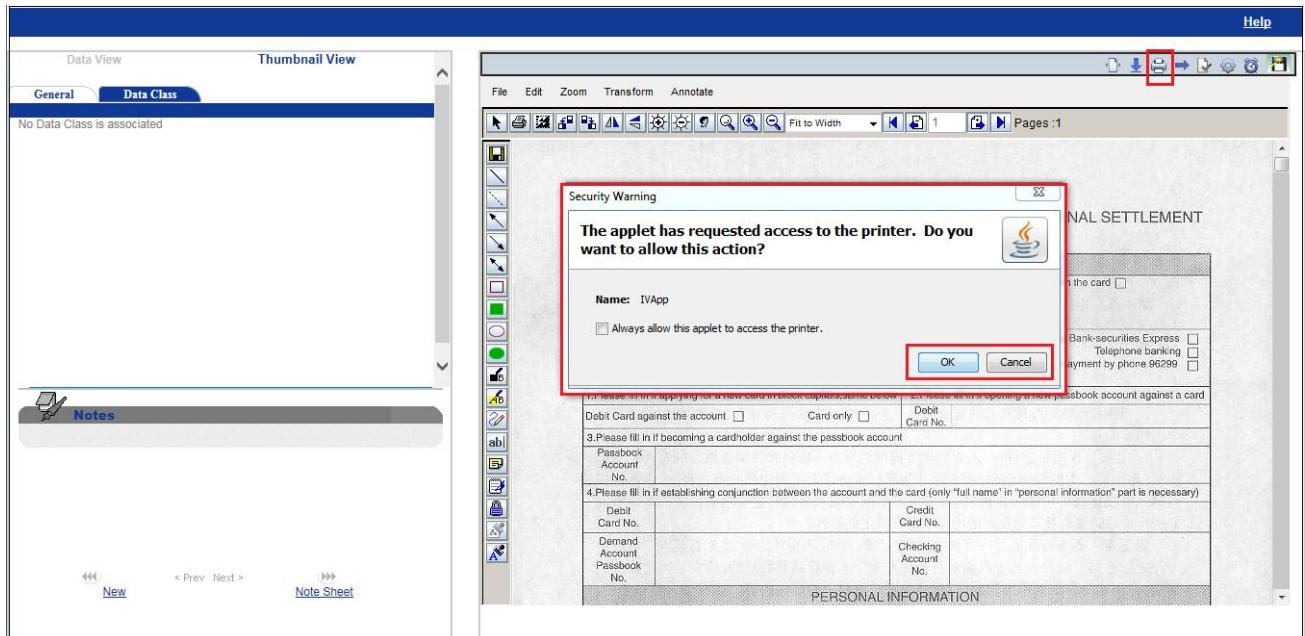


Figure: 4.52

4. Forward:

- a. Forward Document allows in mailing the selected document to another person. Forward button pops-up the following screen.

Document Viewing – Applet Viewer

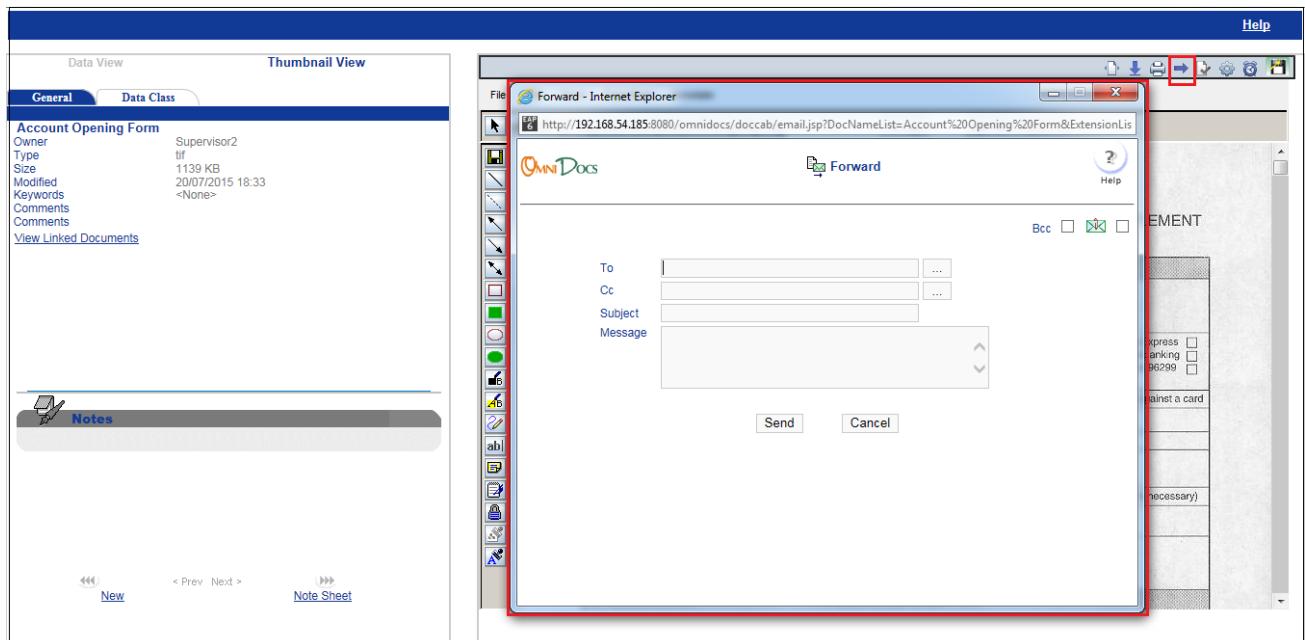


Figure: 4.53

- b.** For further steps, refer [Section 2.6.17](#) of the manual.

5. Check Out

Check Out button invokes the checkout dialog box to check out the document.

To check out a document follow the following steps:

- a.** Click the **Check Out** option.
- b.** The message box is displayed as shown, to checkout a document, click the **OK** button, and else click on **Cancel**.

Document Viewing – Applet Viewer

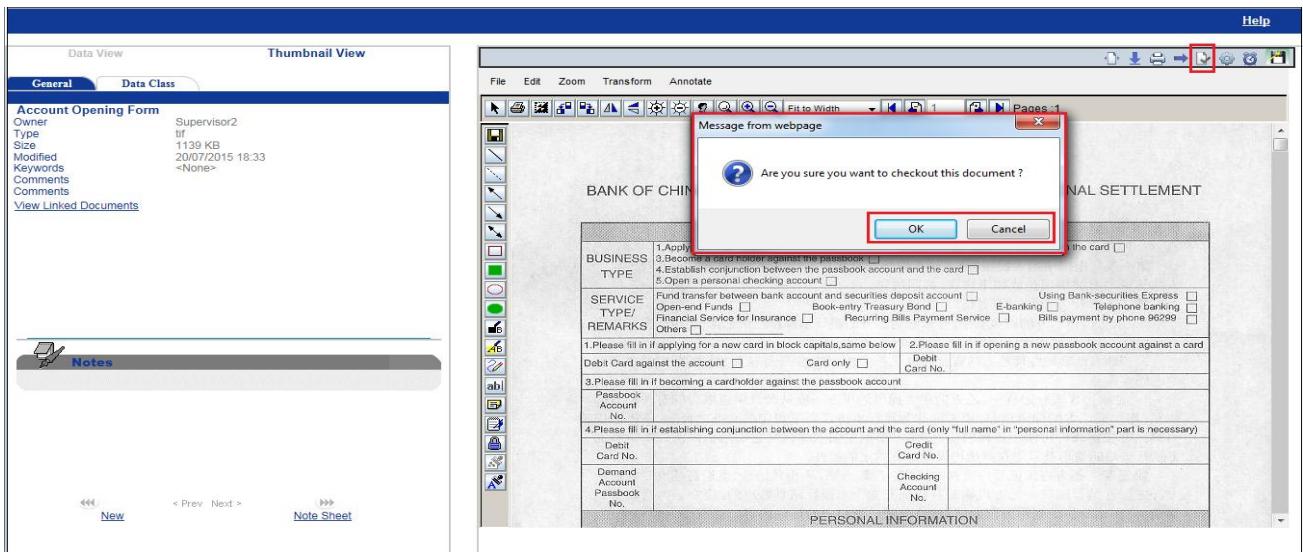


Figure: 4.54

- c. After clicking **OK** button, the **Check Out** screen pops-up. To close the Check Out Document screen: Click **Close**.
- d. Click **download** link to download the checked-out document.

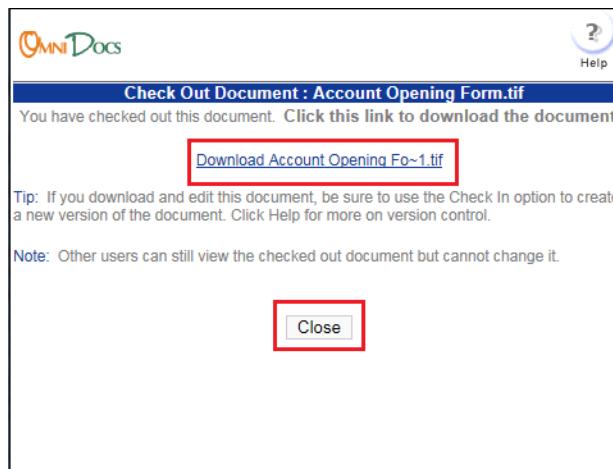


Figure: 4.55

6. Properties

- a. **Properties** button invokes the **Document Properties** screen.

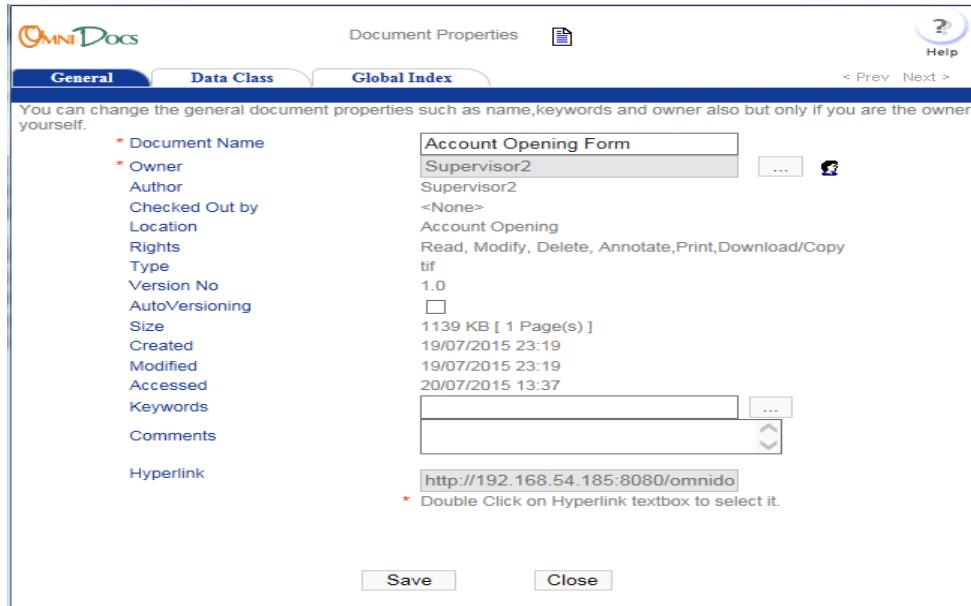


Figure: 4.56

7. Alarms:

Alarms/Reminders button invokes the Alarms/Reminders screen to set the notification for any user of the cabinet.

- a. To set the alarms/reminders, click the **Alarms/Reminders** button.

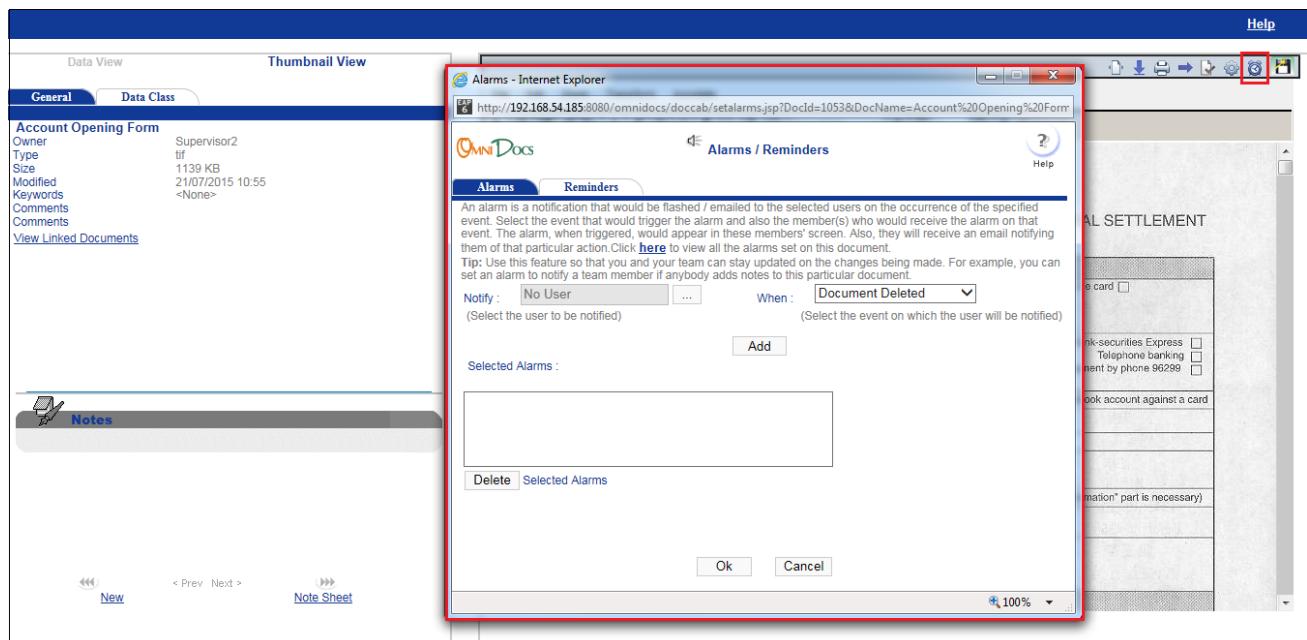


Figure: 4.57

- b.** For further steps, refer [Section 2.6.16](#) of the manual.

8. Save Rotaion

- a.** To set rotation of a opened document., Click **Save Rotation** button.

9. Help:

- a. Help** button invokes the help foe Newgen OmniDocs 9.1.

Document Viewing – Applet Viewer

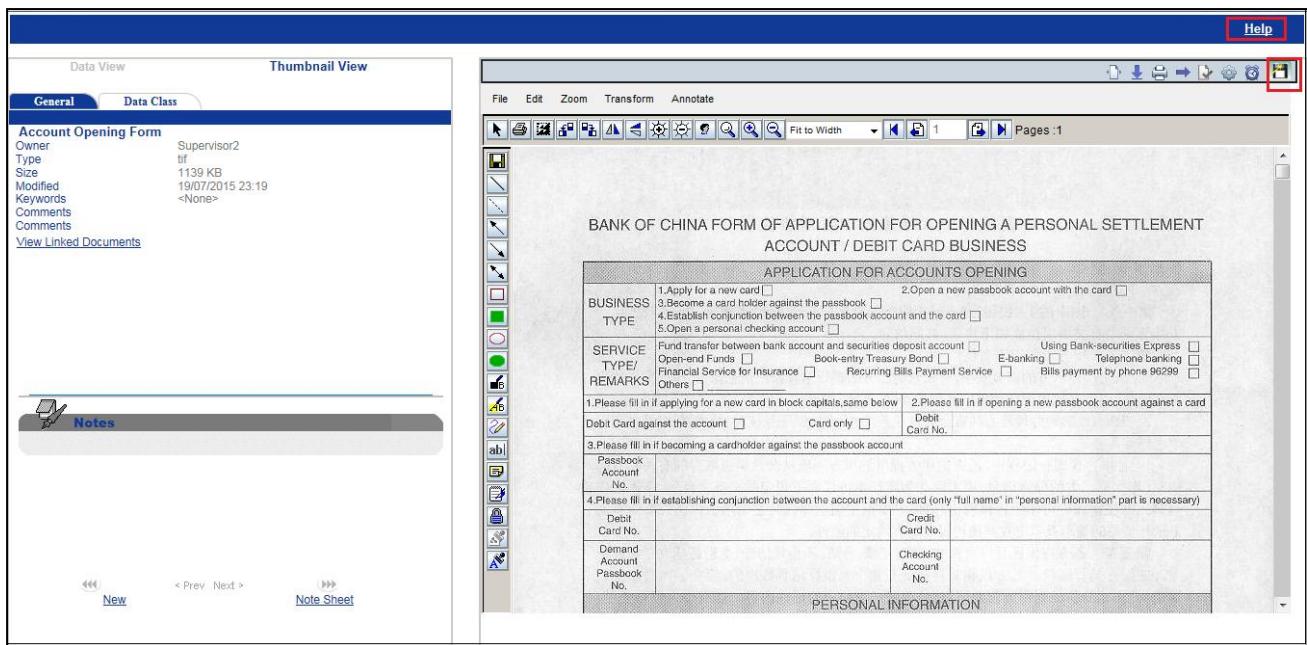


Figure: 4.58

10. Cover page

- The Toolbar consists of **Cover Page** option to add annotations on these documents.
- Click **Cover page** option provided in the icon tool bar. You can add annotations to any document.

NOTE:

The cover page option is only appears foe non-image documents

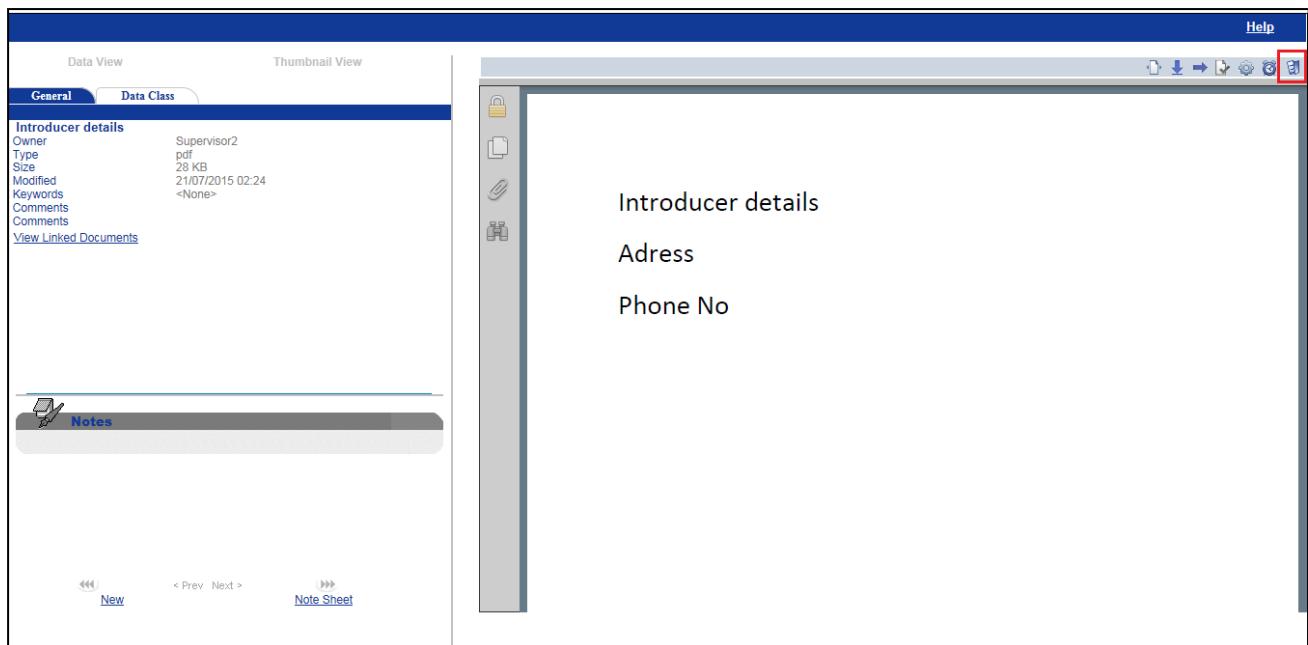
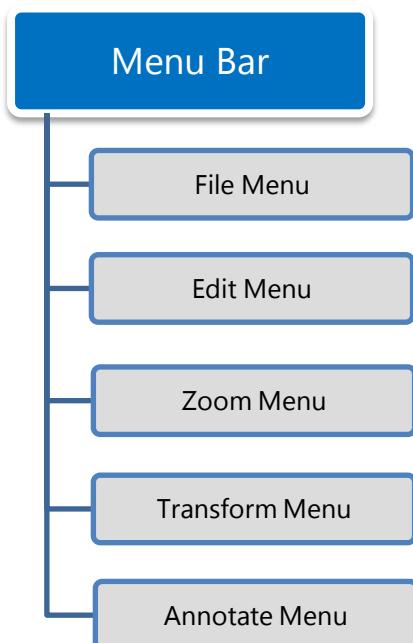


Figure: 4.59

4.2 Menu Options

The Menu bar contains various menu items including support for editable annotations, which allow the user to apply various types of annotation. The various menu items are:



4.2.1 File Menu

Accessing File Menu:

Save: Saves the applied annotation on the document.

Print: Prints the annotation.

Properties: Displays the image properties.

The **File menu** is shown in the following screen.

4.2.1.1 File Save Annotation

To save the annotations applied on the document

7. Press **Ctrl + S** or Click **File menu**, and then click **Save Annotation**.

4.2.1.2 File Print

To print the annotation, follow the following command:

8. Click **Ctrl+P** or Click **File menu**, and then click **Print**.
9. The Print Annotation has discussed earlier.

4.2.1.3 File Properties

To view information regarding the displayed image properties, follow the following commands:

- Click **Ctrl+I** or Click **File menu** and then click **Properties**.
- The **Image Properties** dialog box is invoked which displays the properties of the image document, as shown in the following screen.
- Click **OK** to close Image Properties window.

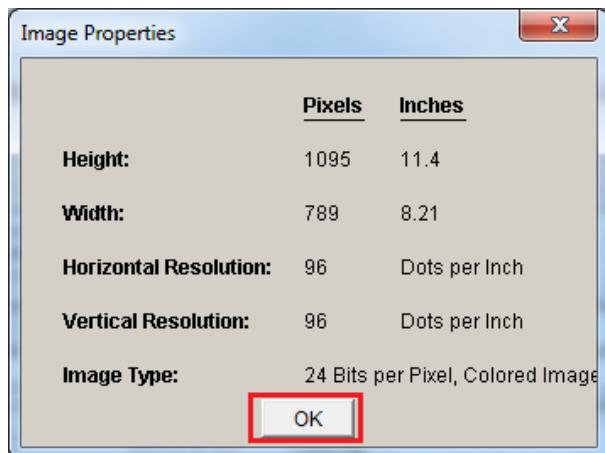


Figure: 4.60

4.2.2 Edit Menu

Edit Menu enabled only when annotation editing is allowed

- The **Edit Menu** is shown in the following screen.



Figure: 4.61

Accessing Edit Menu:

- **Cut:** Cut the selected annotation.
- **Copy:** Copies the selected annotation.
- **Paste:** Pastes the cut/copied annotation at a specified place on the image.
- **Undo:** Enables the user to revert the immediately preceding annotation action carried out.
- **Undo All:** Enables to revert all the annotation actions performed after the last save.

4.2.2.1 Edit Cut

To cut selected annotation:

- Click **Ctrl + X** or Click **Edit menu**, and then click **Cut**.

4.2.2.2 Edit Copy

To copy selected annotation:

- Click **Ctrl + C** or Click **Edit menu** and then click **Copy**.

4.2.2.3 Edit Paste

To paste the cut/copy annotations at a specified point on the image:

- Click **Ctrl+ V** or Click **Edit menu**, and then click **Paste**.

4.2.2.4 Edit Undo

To revert immediate carried out action:

- Click **Ctrl + Z** or Click **Edit menu**, and then click **Undo**.

4.2.2.5 Edit Undo All

To revert all the annotation actions performed after the last save:

- Click **Ctrl + A** or Click **Edit menu**, and then click **Undo All**.

4.2.3 Zoom Menu

The Zoom Menu is shown below in the following screen.

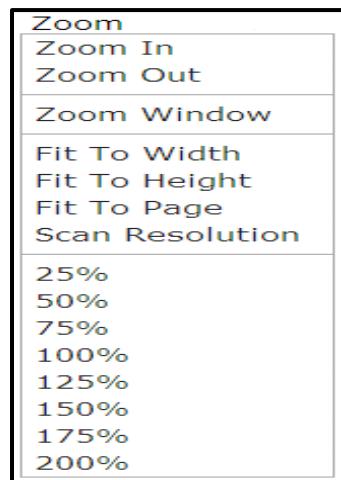


Figure: 4.62

Accessing Zoom Menu:

- **Zoom In:** Increases the size of the selected document
- **Zoom Out:** Decreases the size of the selected document
- **Zoom Window:** Invokes the zoom window which zooms the selected portion of the selected document.
- **Fit to Width:** Increases the width of the document to that of the width of the applet.
- **Fit to height:** Increases the height of the document to that of the height of the applet
- **Fit to page:** Increases the document so that it fits to the size of the applet
- **Scan Resolution:** Scans the resolution to that of the maximum resolution.

4.2.3.1 Zoom In

To increase the size of the selected document, Click Zoom menu, and then click **Zoom In**.

4.2.3.2 Zoom Out

To decrease the size of the selected document, Click Zoom menu, and then click **Zoom Out**.

4.2.3.3 Zoom Window

To invoke the zoom window, click Zoom menu, and then click **Zoom Window**.

4.2.3.4 Fit to Width

To increase the width of the document to that of the width of an applet, Click Zoom menu, and then click **Fit to Width**.

4.2.3.5 Fit to Height

To increase the height of the document to that of the height of the applet, Click Zoom menu, and then click **Fit to Height**.

4.2.3.6 Fit to Page

To increase the document so that it fits to the size of the applet, Click Zoom menu, and then click **Fit to Page**.

4.2.3.7 Scan Resolution

To scan the resolution to that of the maximum resolution, Click Zoom menu, and then click **Scan Resolution**.

Scan DPI enables to display the image at the DPI on which it was scanned.

4.2.4 Transform Menu

The Transform Menu is shown in the below screen.

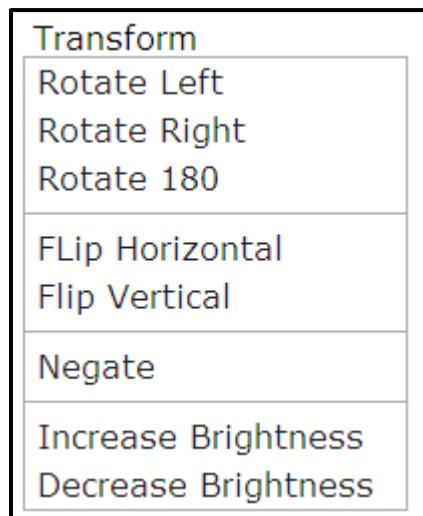


Figure: 4.63

Accessing Transform Menu:

- **Rotate Left:** Rotates the document to left position
- **Rotate Right:** Rotates the document to right position
- **Rotate 180:** Rotates the document to 180.
- **Flip Horizontal:** Horizontally rotates the document.
- **Flip Vertical:** Vertically rotates the document.
- **Negate:** Inverts the color of the document.
- **Increase Brightness:** Increases the brightness of the document for viewing purpose.
- **Decrease Brightness:** Decreases the brightness of the document for viewing purpose.

4.2.4.1 Rotate Left

To rotate the document to left position, Click **Transform**, and then click **Rotate Left**.

4.2.4.2 Rotate Right

To rotate the document to right position, Click **Transform**, and then click **Rotate Right**.

4.2.4.3 Rotate 180

To rotate the document to 180, Click **Transform**, and then click **Rotate 180**.

4.2.4.4 Flip Horizontal

To rotate the document horizontally, click **Transform**, and then click **Flip Horizontal**.

4.2.4.5 Flip Vertical

To rotate the document vertically, click **Transform**, and then click **Flip Vertical**.

4.2.4.6 Transform Negate

To invert the color of the document, click **Transform**, and then click **Negate**.

4.2.4.7 Increase Brightness

To increase the brightness of the document for viewing purpose, Click **Transform**, and then click **Increase Brightness**.

4.2.4.8 Decrease Brightness

To decrease the brightness of the document for viewing purpose, Click **Transform**, and then click **Decrease Brightness**.

4.2.5 Annotate Menu

Annotate Menu enabled only when annotation editing is allowed.



Figure: 4.64

The annotation menu is used for applying annotations on the images. Checking the Enable Annotations menu item or any button on the annotation toolbar sets the applet in the annotation mode. This implies that the applet enables all the annotation operations except for the Hand Grabber, which remains disabled and toggles with the **Enable Annotation mode**.

Accessing Annotate Menu:

- **Enable Annotation:** Enables annotation drawing over the document.
- **New Group:** The New Group menu item allows the user to create a group, draw / modify annotations belonging to that group.
- **Delete Group:** Enables to delete the selected group.
- **Select Group:** Enables the user to select different annotation groups created for a document.

4.2.5.1 New Group

- To create a group, draw/modify annotations belonging to the group, Click Annotate menu and then click **New Group**.
- The **Add Annotation Group** screen appears.
- Enter the required annotation group in which the annotations will get saved.
- Click **OK** to save the changes made and to exit from the Add Annotation Group dialog box, else click **Cancel**.

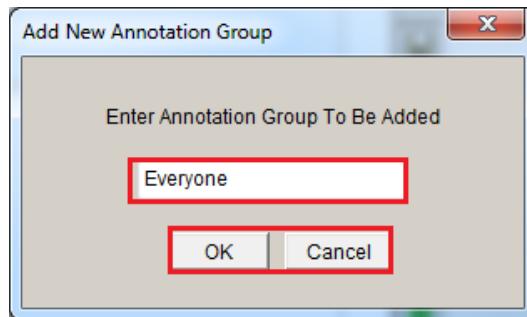


Figure: 4.65

4.2.5.2 Delete Group

- To delete selected group, Click **Annotate** menu and then click **Delete Group**
- The **Delete Annotation Group** dialog box appears.

NOTE:

The Delete Group option is not available for users having view rights for the specific group. After the group is deleted all annotations present within the group also get deleted

- Select the required annotation group that needs to be deleted.
- Click **OK** to delete the selected annotation group else click **Cancel**.

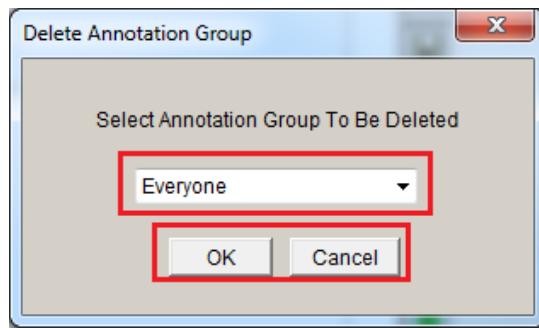


Figure: 4.66

4.2.5.3 Select Group

- To select different annotation groups created for a document, Click **Annotate** menu and then click **Select Group**.
- Select the required group and all corresponding annotations applied or changed thereafter shall be effective for the selected group.
- Clicking on Select Group option, the **Select Annotation Group** window appears.



Figure: 4.67

4.2.6 Non-Image Document Operations

The non-image document will be open in its native application; the required prerequisite for opening the non-image document is the machine must have native application of the document.

Take an example of a DOCX document, as per prerequisite the machine have the native application of DOCX:

- Select a **DOCX** document

Document Viewing – Applet Viewer

Name	Type	Owner	Size	Order No	Pages	Version	Modified Date	Data Class	Useful Info	Annotated	Linked
Scantest_2	TIF	Supervisor	7.09 MB	1	8	1.0	28/04/2016 13:12	None	N	N	
ssfa	TIF	Supervisor	20.54 KB	3	1	1.0	28/04/2016 13:12	None	N	N	
sfs	JPG	Supervisor	44.98 KB	5	1	1.1	28/04/2016 14:43	None	N	N	
sfs	JPG	Supervisor	44.98 KB	6	1	1.1	28/04/2016 16:05	New_dataclass	N	N	
sfs	JPG	Supervisor	44.98 KB	2	1	1.1	28/04/2016 16:47	None	N	Y	
sfs	JPG	Supervisor	44.98 KB	8	1	1.1	28/04/2016 16:47	None	N	N	
sfs	JPG	Supervisor	44.98 KB	4	1	1.2	28/04/2016 16:51	None	N	N	
sfs	JPG	Supervisor	44.98 KB	7	1	1.2	28/04/2016 16:51	None	N	N	
saurav	TIF	Supervisor	4.08 MB	9	27	1.0	28/04/2016 17:30	None	N	N	
Approval Card	DOC	Supervisor2	123.00 KB	10	1	1.0	04/05/2016 18:31	None	N	N	

< Prev Next >

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Figure: 4.68

- A ‘File Download’ dialog box appears. Click ‘Open’ tab to open document in its native application, Click the ‘Save’ tab to save the document and click ‘Cancel’ tab to close the dialog box without saving and opening the document.
- Click **Open** tab in the following dialog box.

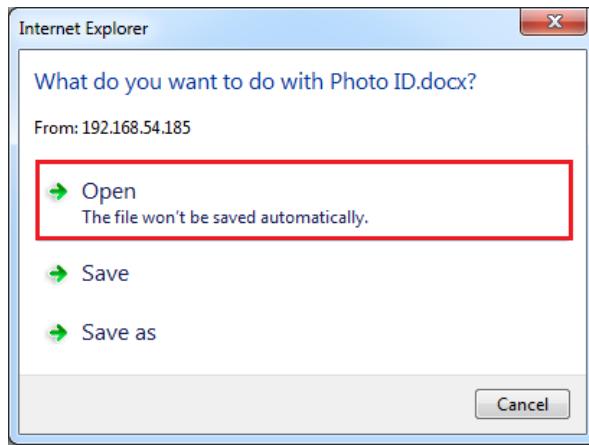


Figure: 4.69

- The selected document get opens in its native application, as shown:

Document Viewing – Applet Viewer

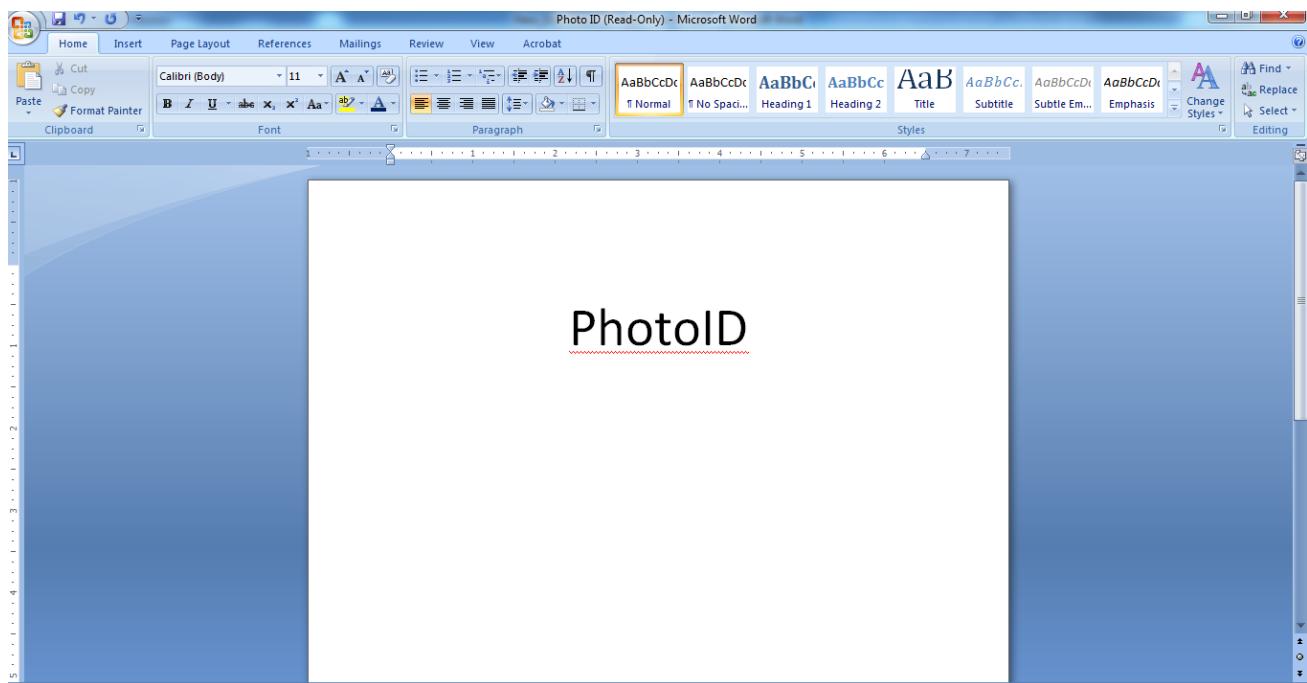


Figure: 4.70

NOTE:

If OIVT is not installed on the server machine and you try to open a document, then the document gets invoked in its native application provided the application is installed on the client's machine. If the application is not installed then a Download screen is invoked through which the user can either download the document or open it.

4.2.7 Viewing Options

Viewing Options are applicable only for **Image Documents**.

For Image Document, you can specify a particular page number and view it. You also have various zoom options.

To view a specific page of the document, follow the following steps:

- Specify the page number in the text box, and click **Enter**. The specified page is displayed.

Document Viewing – Applet Viewer

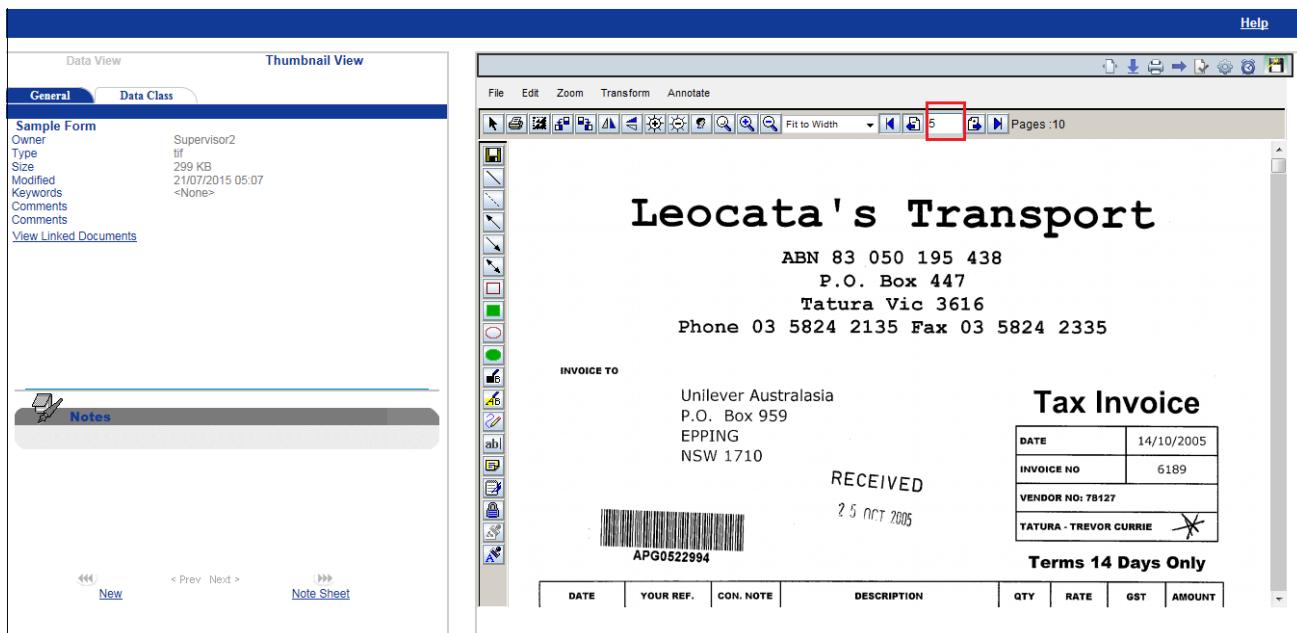


Figure: 4.71

- To browse through the pages, click **Next Page** or **Prev Page** button. You can go directly to the first page or the last page of the document by clicking the and buttons.

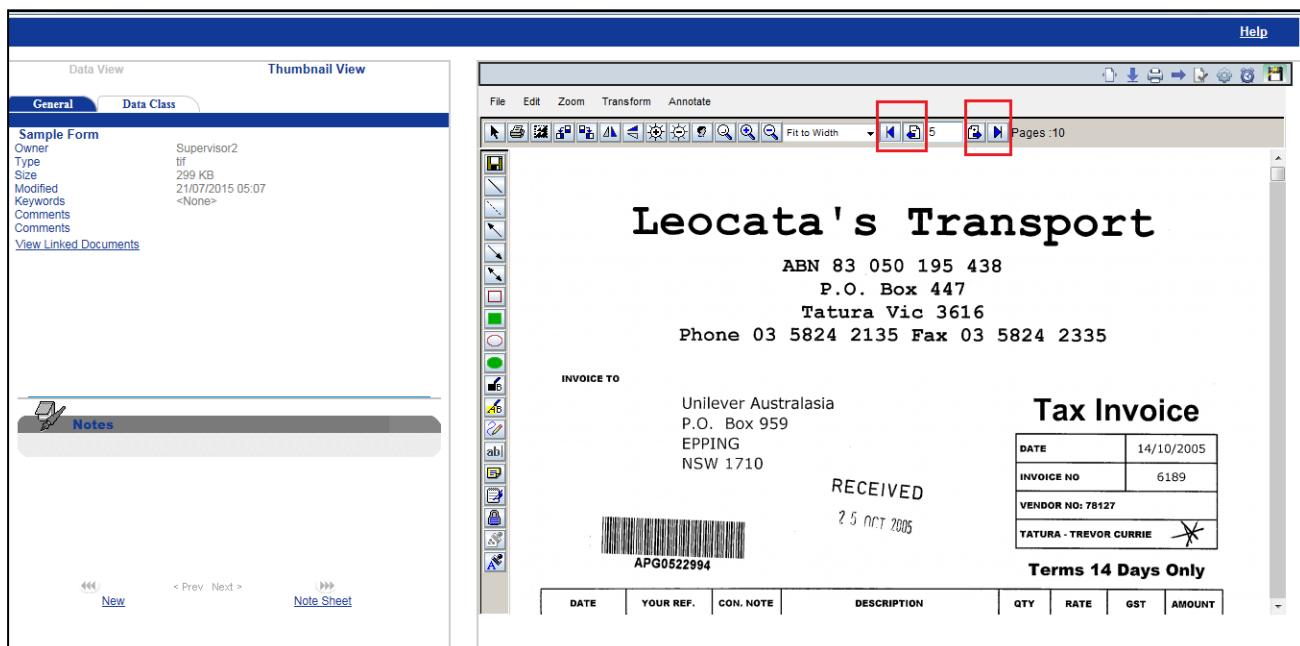


Figure: 4.72

4.2.8 Document view in Full Text Search

4.2.8.1 Hit Highlighting

- A user can perform full text search to determine the documents that contain specific word(s) or phrase. The documents that contain those word(s) are then listed. The user can then view the document.
- Generally the user wants to see that part of the document, which contains the specified word(s). The Hit-highlighting feature opens the image document and highlights the specified words wherever they occur in the document. In case of multiple pages initially, the first page that contains any of the specified word is opened.
- Full text search is a very powerful feature for retrieving documents. It is performed by specifying a word within the document body to search for. All the documents that contain that text are obtained. It is very useful in situations where the user is looking for all the documents that pertain to some particular subject and are present in different locations.
- Full text search feature is provided in the OmniDocs product for both the image and non-image documents. The user can search for documents by specifying the words that he is looking for in the document body. All the documents that contain that text are identified and are then listed.
- The user specifies search criteria for full text search, the documents are searched based on this criteria and the resultant document list is then displayed to the user. The user can then view any of those documents.

To execute a full text search follow the following steps:

- Click a **Search** icon in the OmniDocs Master Desktop.
- The **Search** screen appears, select **Full Text** tab.
- Specify the text in the **Search document Containing Text** textbox.
- Click **Search**, The **Document Search Result** appears.

Document Viewing – Applet Viewer

The screenshot shows the OmniDocs interface with the following details:

- Search Bar:** Contains "oraclejuly16" in the search input field, with a red box highlighting it.
- Search Type:** Set to "Intelligent Default" (radio button selected), with a red box highlighting the radio button.
- Search Results:** A table titled "Document Search Results" showing 1 - 10 of 57 possible documents. The table includes columns: Name, Data Class, Modified Date, Size, Type, Pages, Owner, and Rank.
- Highlighted Document:** The first document in the list, "value4", has its entire content highlighted in red, indicating the search results.
- Toolbar Buttons:** Includes "Search", "Clear All", and "Refine Search".
- Page Navigation:** Shows "Showing 1 - 10 of 57 possible documents" and buttons for "Prev" and "Next".
- Format:** Set to "txt" (Text format).
- Bottom Buttons:** Includes "Properties", "Links", "Move / Copy", "Post", "Delete", "Duplicate", "Check Out", "Alarms/Reminders", "Check In", "Forward", "Versions", "Edit Office Document", "Sharing", and "Download".

Figure: 4.73

- The **first objective** is to provide the user a mean to identify the exact location where those words are present so that he does not have to look for them in the document. We can do this by highlighting the searched words in the document.
So whenever the user views the document retrieved as a result of FTS, the document will be displayed with the word on which search was done, coming highlighted, at all the places where the word is present in the document.
The word may be present at multiple locations in the same page or in case of multi-page document it may be present in different pages.
- The **second objective** for the case of multi-page document is to allow him to navigate to the next or previous page that contains that word.
We can do this by providing four toolbar buttons. Two for moving to the next or previous location of the word in the same page and two for moving to the next or previous page

NOTE:

The user can also traverse between the pages that contain the given word

Full Text Search – OD Web Desktop

User can even carry out the full text search using **the OD Web Desktop**. This they can carry out by following the given steps:-

- Select the Search option in **OD Web Desktop** home page.
- In the **Search** option, select **Full Text Search**.
- The **Full Text Search** screen appears.
- In this screen, enter the required necessary details.
- Click the **Search** button, to search the text.
- Else, click **Clear** to clear the entered details.

The screenshot shows the 'Full Text Search' results for the query 'a*'. The results list several documents, including:

- value4
- 840557490-Proposal Enclosures 1 - Copy (2)
- 840557490-Proposal Enclosures - Copy - Copy
- 840557490-Medical Reports - Copy (2) - Copy
- 840557490-Proposal Enclosures 1 - Copy - Copy
- Ran557490-Protocol Enclosures 1 - Conv - Conv - Conv

Figure: 4.74

4.2.8.2 Ranking

When we search a document through full text search in search results we are provided a column called rank in it. The rank indicates the frequency of no of occurrences of the searched word, for e.g. if the rank for a document "A" is 10 and the rank for a document "B" is 15 then it indicates the frequency of occurrence of searched word is more in the document having rank as 15.

5 Audio/Video Media View

To view any Audio/Video Media files, carry out the following given steps.

1. Double Click on the required media file.
2. The media files opens in media file viewer.

NOTE:

Only MP3, MP4 (and its family of file formats), FLV, MOV and 3GP (and its family of file formats) can be uploaded and viewed using the media file viewer.

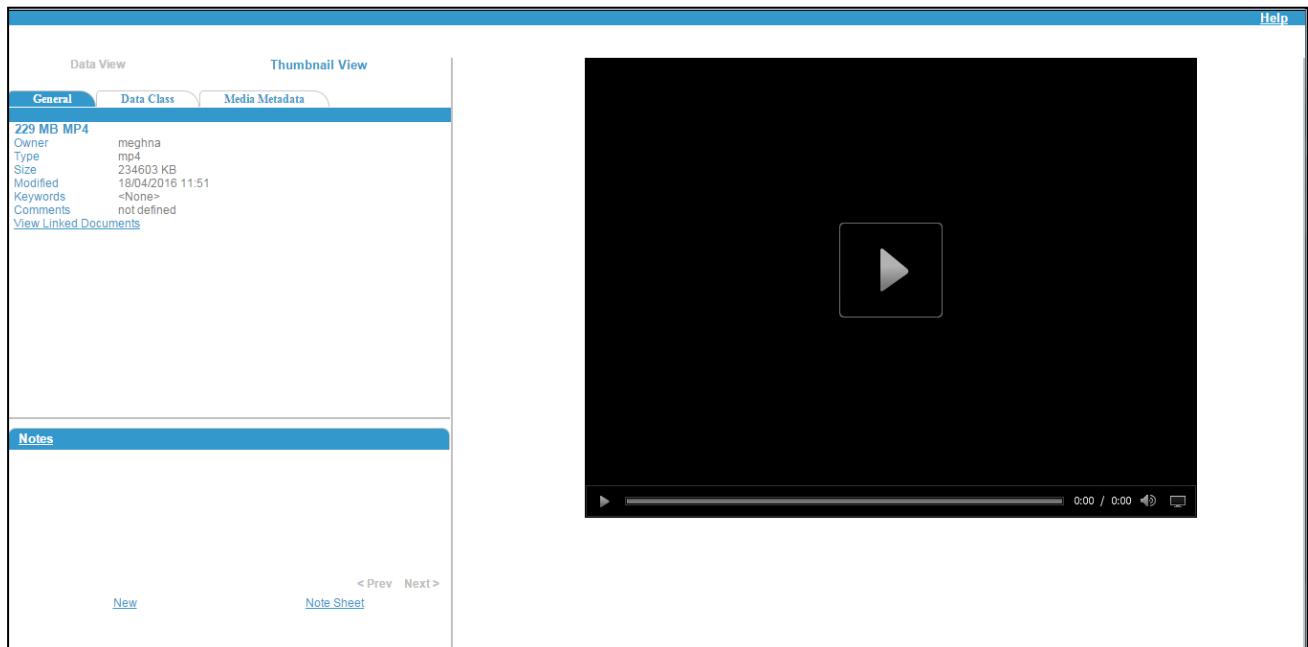
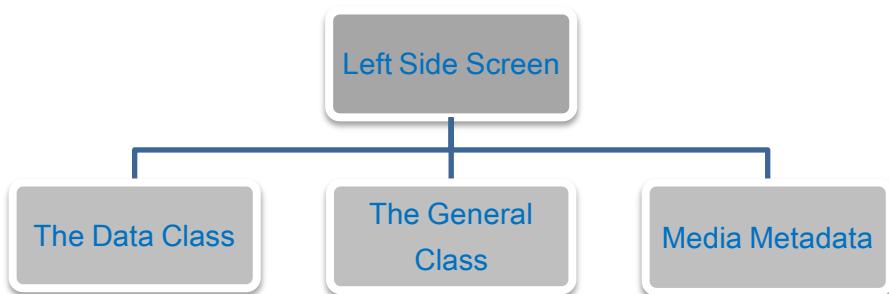


Figure: 5.1

The screen is divided into two parts:-

1. Right Side
2. Left Side

- The left side of the screen consists of three links.



The General: The General displays the General Properties of the selected media file such as the name of the media file, the type, number of pages, the size, modification date, the owner of the media file, and keywords associated with the media file.

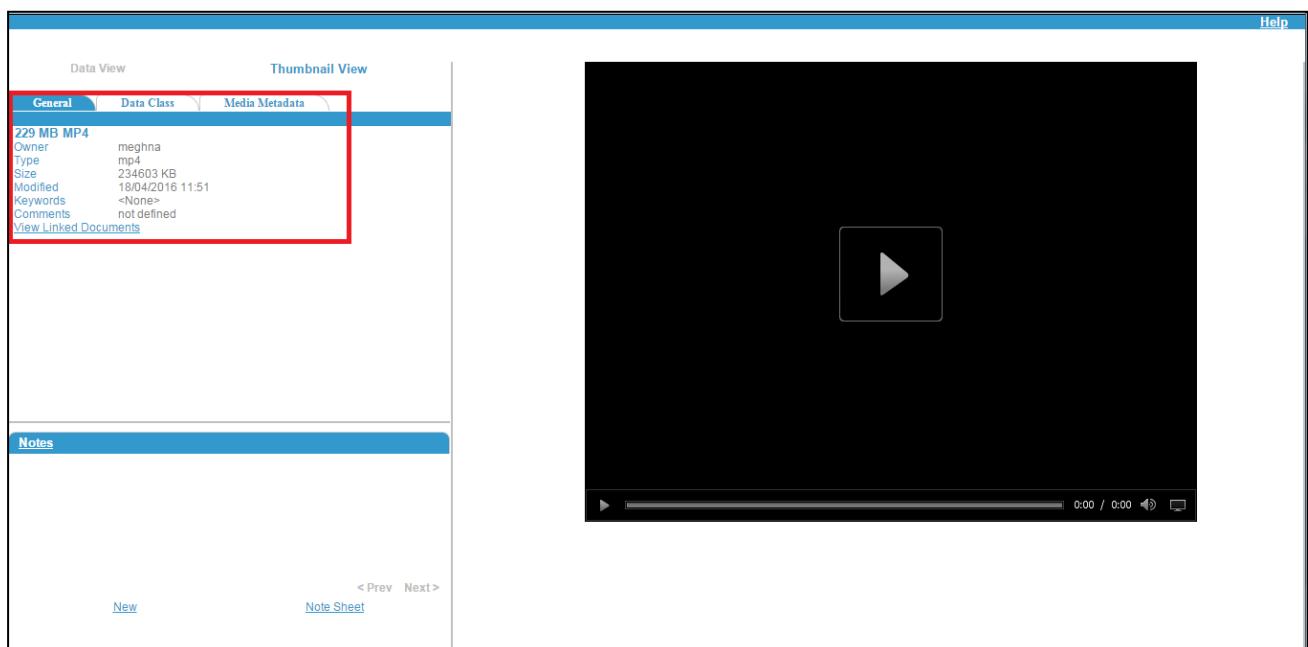


Figure: 5.2

Audio/Video Media View

The Data Class: The Data Class displays the Data Class associated with the particular media file along with their field values.



Figure: 5.3

Media Metadata: The Media Metadata provides basic information about the particular media file.



Figure: 5.4

The Right Side of the Screen consists of Media File Player.

- Click on the **Play** button to auto stream and play the media file.



Figure: 5.5

5.1 MediaView Search – OD Web Desktop

User can search Media Audio/Video Files, based on their metadata/properties using **the OD Web Desktop**. This they can carry out by following the given steps:-

1. Select the Search option in **OD Web Desktop** home page.
2. In the **Search** option, select **Mediaview Search**.
3. The **Mediaview Search** screen appears.
4. In this screen, from the **Search In** section, click on the ellipsis button present before it to select the database where the search is to be made.
5. In the General section, enter the name of the to be searched Media Audio/Video file.
6. In the **Media Metadata** section, select the metadata operator and the corresponding search value.
7. In the **Data Class Name** section, select the dataclass from the drop down option.

Audio/Video Media View

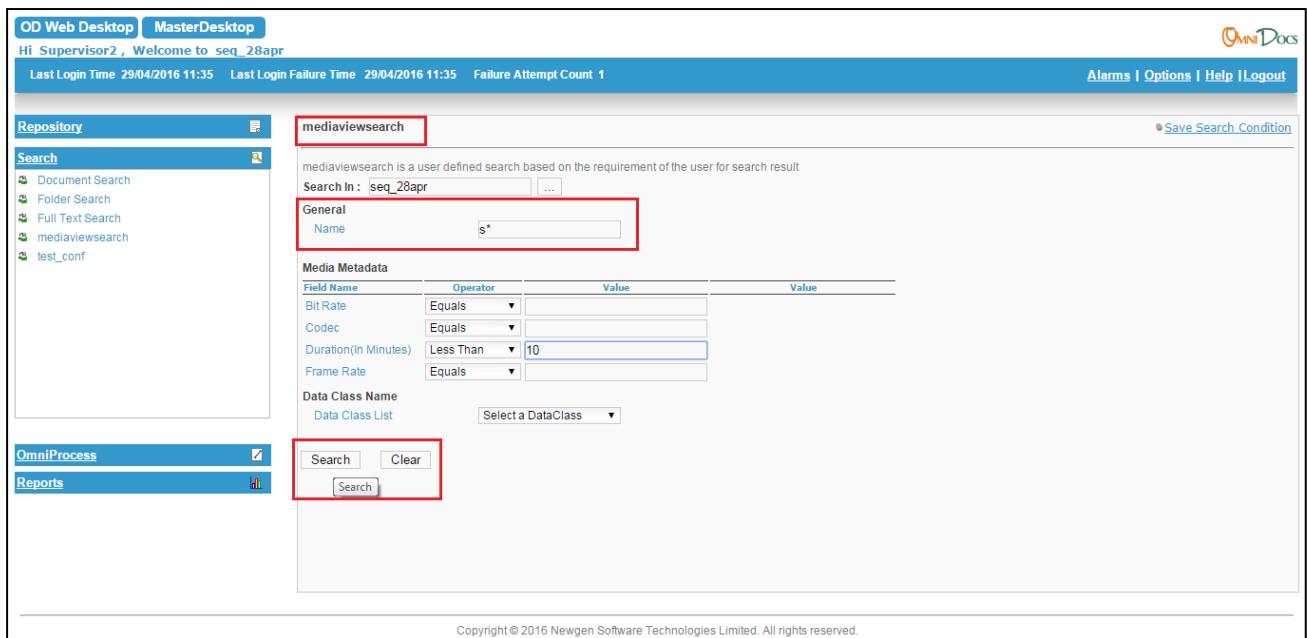


Figure: 5.6

8. Click the **Search** button, to search the text.
9. Else, click **Clear** to clear the entered details.
10. The **Search Result** appears, as visible in the below given screen.

Search Results										
Name	Type	Modified Date	Bit Rate	Codec	Duration	Frame Rate	Height	Sample Rate	Title	Width
sample_3GPP2	3G2	28/04/2016 16:48		mp4v	00:00:04	15 frames/sec	144 mm			176 mm

Figure: 5.7

6 Easy RMS

If RMS is also deployed on the Server, then some of the RMS-related operations will be available from OD Search User Interface. Now, Document Search functionality fetches both normal documents as well as records associated with records.

Integration of RMS with the OmniDocs also allows users to move Document(s) from OmniDocs to the RMS and store it in the RMS. Users can also file Document(s) as record(s) in RMS and create reference(s) for it in the OmniDocs.

To move a Document from the OmniDocs to RMS:

1. Select Documents from the folder in the OmniDocs screen by selecting the checkbox against it. From the Document Operation list, click “**Assign to Fileplan**” link

The screenshot shows the OmniDocs interface. At the top, there are tabs for 'OD Web Desktop' and 'MasterDesktop'. The main header includes 'Hi Supervisor, Welcome to Zurich_test2', 'Last Login Time 05/05/2016 12:03', and links for 'Alarms | Options | Help | Logout'. On the right, there's a vertical toolbar with options like 'Properties', 'Move/Copy', 'DeleteDoc(s)', 'Check Out', 'Versions', 'Sharing', 'Download', 'Links', 'Post', 'Duplicate', 'AuditLog', 'Alarms/Reminders', 'Forward', and 'Assign To FilePlan' (which is highlighted with a red border). The central area has sections for 'Repository' (showing a tree view of 'Folder(s)', 'Employee Records', and 'Personal Documents'), 'Search' (with 'OmniProcess' and 'Reports' buttons), and a main table titled 'zurich_test/Employee Records/w/Personal Documents'. The table lists documents with columns for Name, Type, Owner, Size, Order No, Pages, Version, Modified Date, Data Class, and Useful Info. The 'Modified Date' column shows dates like 19/08/2014 16:30 and 19/08/2014 16:33. The 'Data Class' column consistently shows 'EmployeeInfo'. The 'Modified Date' column is sorted by descending date. At the bottom of the interface, there's a copyright notice: 'Copyright © 2016 Newgen Software Technologies Limited. All rights reserved.'

Figure: 6.1

Note:

Document Operations is visible after selecting only Normal Documents.

2. The “**Assign to Fileplan**” link window appears. This window enables user to specify various properties of the Document and move it to RMS with the specified set of properties.

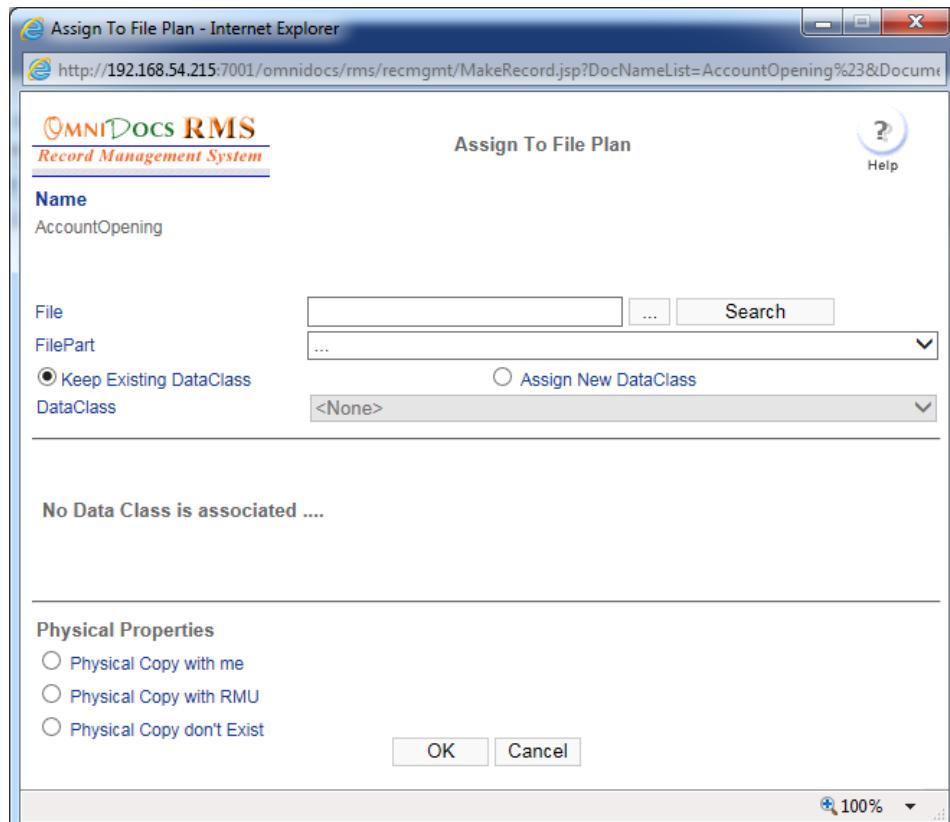


Figure: 6.2

The following table describes “Assign to file Plan” screen field and their description:

Field Name	Description
File	Enables you to browse using “...” or search button and select the target file in File Plan
FilePart	Enables you to select a File Part from the list of File Part, which is displayed on selecting a file. The selected File Part should be open/re-open to complete the operation.
Keep Existing DataClass	Specifies that the document(s) being filed retains its original Data Class and properties
Assign New DataClass	Enables you to specify new Data Class and fields for

	the documents being moved.
--	----------------------------

Data Class	Enables you to select the Data Class for the document from the drop down list of Data Classes. This drop down list is enabled only when you select the Assign New Data Class radio button.
Physical Copy with me	Specifies that the physical copy of the filed item is marked with the logged-in user.
Physical Copy with RMU	Specifies that if there is no current borrower for the field item, the request for the item can be sent to supervisor or any of the members of the RMU.
Physical Copy don't Exist	Specifies that the filed item does not have a corresponding physical copy.

3. After specifying the above properties, click the **OK** button to mark the document(s) in RMS.

To Request Records:

1. Search the Record, by executing **document search** operation.
2. From the searched '**Document**' and '**Record**' List, select the required Records.

NOTE:

Save Report and Request Properties are visible when Record Documents are selected.

Multiple Records can be selected "To Request Records".

3. Click the **Request** link.

Easy RMS

The screenshot shows the 'Document Search' page of the Easy RMS application. The search term 'A*' is entered in the 'Name' field. The results table includes columns for Name, DataClass, Modified Date, Size, Type, Pages, and Owner. A red box highlights the 'Request' column header. The results list includes several files, with 'AccountOpening' being the last item in the list.

Name	DataClass	Modified Date	Size	Type	Pages	Owner
APG05229941	None	02/09/2015 10:05	683 KB	TIF	1	krishna
animatedGiraff	None	02/09/2015 12:46	13 KB	GIF	1	krishna
air	None	02/09/2015 12:52	352 KB	JPG	1	krishna
Avis Rent a Car South Africa	Dispatch	02/09/2015 23:43	18181 KB	PDF	32	Supervisor2
AccountOpening	None	03/09/2015 17:35	91 KB	TIFF	1	Supervisor2

Figure: 6.3

4. The **Generate Transfer Request** screen appears.

The screenshot shows the 'Generate Transfer Request' screen. It includes fields for Date Required (03-09-2015), Return Date (03-09-2015), Priority (Medium), Group, and a Description area. Below this, a table lists a single document requested: 'AccountOpening' (File Number A01, Availability Y). At the bottom are 'Remove' and 'Direct Request' buttons, and 'Generate Request' and 'Cancel' buttons.

Name	File Number	Availability	Current Borrower	Current Requestee
AccountOpening	A01	Y	RMU	0

Figure: 6.4

5. Enter the required details in the **Generate Transfer Request** screen.

Field Name	Description
Date Required	Date on which the documents are required.
Return Date	Date on which the documents will be returned.
Request To Role	User/Role to whom the request is made. You can select a value from the pick list by clicking Ellipsis. If a role is selected, it can be specified for a particular group by selecting a value for Group.
Priority	Priority of the request.
Group	Group of the request.
Description	Description for the request.

6. After entering the details, click on **Generate Request** to generate the request for the selected Records.
7. Else, click on **Cancel** to cancel the request and close the dialog box.

To View Properties of a Record:

1. Search the Record.
2. From the Searched Record List, select the required Record.

NOTE:

Save Report, Request and Properties are visible when Record Documents are selected.

Only one Record has to be selected to view its Properties.

3. Click on the **Properties**.

Easy RMS

The screenshot shows the OmniDocs RMS interface. The top navigation bar includes links for OD Web Desktop, MasterDesktop, RMS, Alarms, Options, Help, and Logout. The main menu on the left lists Repository, Search, and Reports. The central area displays a "Document Search" form with fields for Name (A*) and Data Class Name (Select a DataClass). Below this is a "Search Results" table with columns for Name, DataClass, Modified Date, Size, Type, Pages, and Owner. A red box highlights the "Properties" link in the header of the table. The table contains several entries, with the last one, "AccountOpening", also having its row highlighted by a red box.

Name	DataClass	Modified Date	Size	Type	Pages	Owner
APG05229941	None	02/09/2015 10:05	683 KB	TIF	1	krishna
animatedGiraff	None	02/09/2015 12:46	13 KB	GIF	1	krishna
air	None	02/09/2015 12:52	352 KB	JPG	1	krishna
Avis Rent a Car South Africa	Dispatch	02/09/2015 23:43	18181 KB	PDF	32	Supervisor2
AccountOpening	None	03/09/2015 17:35	91 KB	TIFF	1	Supervisor2

Figure: 6.5

4. Dialog Box showing properties of the selected Record opens.

The screenshot shows the "Record Properties" dialog box for the "AccountOpening" record. The dialog is divided into sections: General Properties, File, DataClass, and Global Index. The General Properties section contains pairs of labels and values such as Record Name (AccountOpening), Record ID (102), Owner (Supervisor2), Author (Supervisor2), Type (NA), Size (91 kb), etc. The File section shows File Part Name (Account Payable), Category (/webora1sep/Fileplan/Accounting Department/Acc...), File Number (A01), Part Number (B02), Location (Upper Partition), Box (Account), File Part Status (Open), and File Part Borrower (RMU). The DataClass section indicates "No Data Class is associated". The Global Index section indicates "No Global Index is associated...". At the bottom right is a "Close" button.

Figure: 6.6

NOTE:

The record properties shown in figure 5.6 are non-editable. That is, the user cannot edit the properties of the records mentioned in **Record Properties** screen.

To View a Document/Record:

1. Search the Document/Record.
2. From the Searched Document/Record List, double-click the required Document/Record.
3. Dialog Box showing the view of the Document/Record opens.

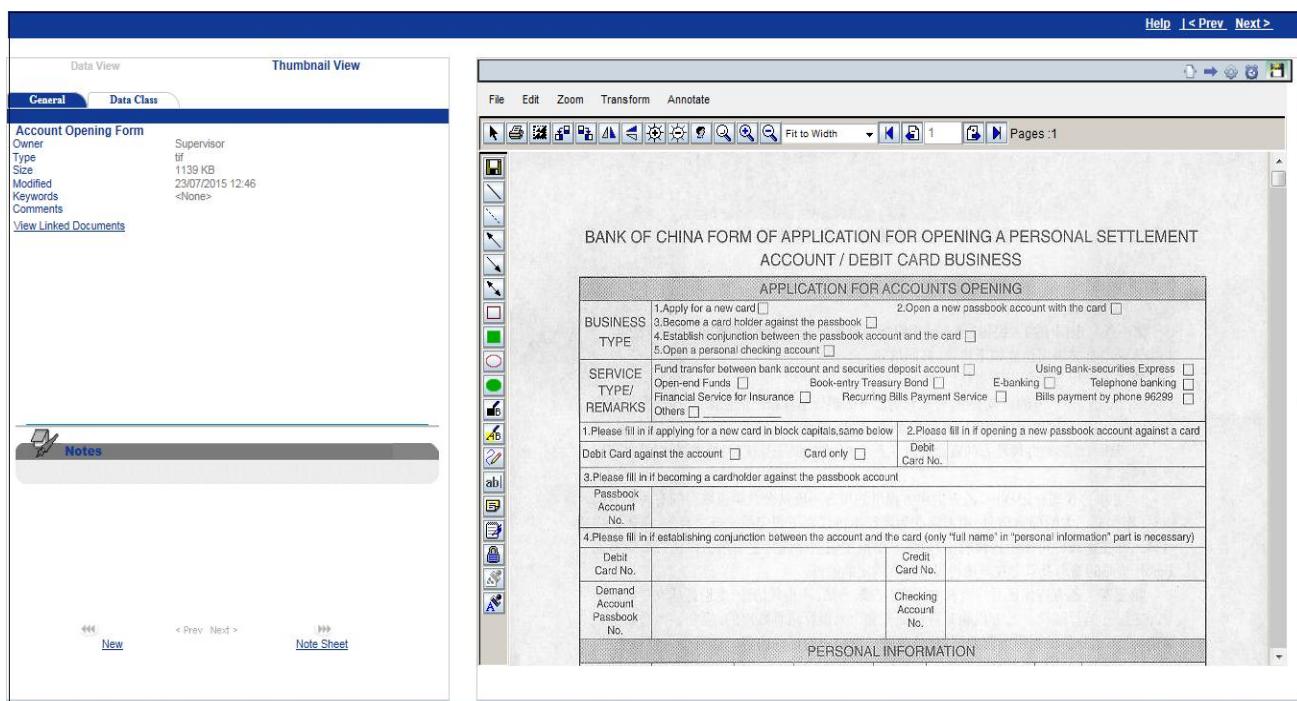


Figure: 6.7

NOTE:

MIXED CONTENT i.e. document and records cannot be selected at the same time.

In case you have already selected a record, and going to select a document, then the Mixed Content Warning message appears.

Similarly, in case you have already selected a document, and going to select a record, the Mixed Content Warning message will appear.

Easy RMS

The screenshot shows the OmniDocs web interface. The top navigation bar includes links for OD Web Desktop, MasterDesktop, RMS, Alarms, Options, Help, and Logout. The main menu on the left has sections for Repository, Search, OmniProcess, and Reports. The central area displays a 'Document Search' results table. A search bar at the top of the table has 'a*' entered. The table columns are Name, DataClass, Modified Date, Size, Type, Pages, and Owner. Several rows are listed, including 'APG05229941', 'animatedGiraff', 'air', 'Avis Rent a Car South Africa', and 'AccountOpening'. A warning dialog box titled 'Message from webpage' is overlaid on the table, stating 'Mixed Selection is not allowed. Please select either document(s) or record(s)' with an OK button. The footer of the page includes copyright information: 'Copyright © 2015 Newgen Software Technologies Limited. All rights reserved.'

Figure: 6.8

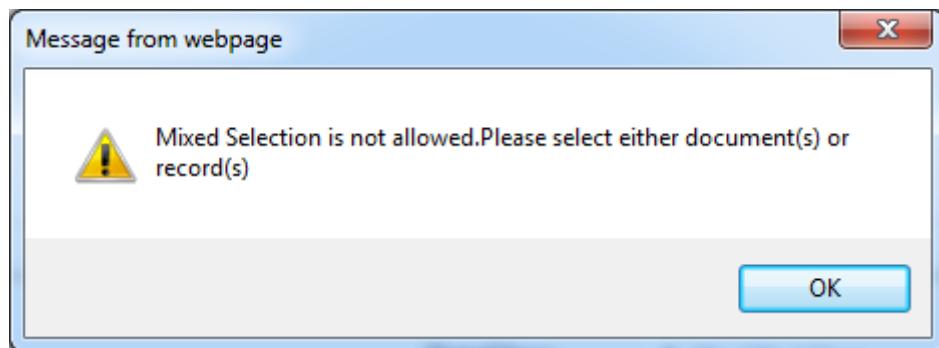


Figure: 6.9

To view File and FilePart:

1. Execute the desired **Folder Search**
2. The Folders, Files and **FileParts** appears as search result.

Easy RMS

The screenshot shows the Easy RMS application interface. At the top, there's a navigation bar with links for 'OD Web Desktop', 'MasterDesktop', 'RMS', 'Hi Supervisor, Welcome to webora1sep', 'Last Login Time 03/09/2015 18:01', and 'OmniDocs'. Below the navigation is a sidebar with 'Repository', 'Search' (Document Search, DocumentSearch, Folder Search, FolderSearch, Full Text Search), 'OmniProcess', and 'Reports'. The main area is titled 'Folder Search' with a sub-section 'Search Results'. It displays a list of items with columns for Name, Modified Date, and Owner. The first item, 'webora1sep\Admin_Samples', is highlighted with a yellow box. The second item, 'webora1sep\Account Opening', is highlighted with a red box. The third item, 'webora1sep\Fileplan\Accounting Department\Account Payable', is highlighted with a blue box. The fourth item, 'webora1sep\Fileplan\Accounting Department\Account Payable\Account Payable', is highlighted with a red box. The fifth item, 'webora1sep\Account Payable', is highlighted with a blue box. Red arrows point from the labels 'Folders' (yellow folder icon), 'File' (blue file icon), and 'FilePart' (blue file icon with a red border) to their respective highlighted items in the list.

Name	Modified Date	Owner
webora1sep\Admin_Samples	03/09/2015 11:01	krishna
webora1sep\Account Opening	03/09/2015 12:57	Supervisor
webora1sep\Fileplan\Accounting Department\Account Payable	03/09/2015 16:53	Supervisor2
webora1sep\Fileplan\Accounting Department\Account Payable\Account Payable	03/09/2015 17:35	Supervisor2
webora1sep\Account Payable	03/09/2015 17:35	Supervisor2

Figure: 6.10

3. To view properties of the FilePart, select the desired FilePart. Click the **Properties** link and follow the same steps as executed for records.
4. To generate request for the FilePart, select the desired FilePart and click **Request** link.

This screenshot is identical to Figure 6.10, showing the 'Folder Search' results page. The red annotations for 'Folders', 'File', and 'FilePart' are present. The 'Request' link in the table header is highlighted with a red box.

Name	Modified Date	Owner
webora1sep\Admin_Samples	03/09/2015 11:01	krishna
webora1sep\Account Opening	03/09/2015 12:57	Supervisor
webora1sep\Fileplan\Accounting Department\Account Payable	03/09/2015 16:53	Supervisor2
webora1sep\Fileplan\Accounting Department\Account Payable\Account Payable	03/09/2015 17:35	Supervisor2
webora1sep\Account Payable	03/09/2015 17:35	Supervisor2

Figure: 6.11

Easy RMS

5. To view properties of the File, select the desired File. Click the **Properties** link and follow the same steps as executed for records
6. You cannot generate “Request” for the searched Files.

The screenshot shows the OmniDocs RMS interface. At the top, there's a navigation bar with tabs for 'OD Web Desktop', 'MasterDesktop', 'RMS', and 'OmniDocs'. Below the navigation bar, it says 'Hi Supervisor, Welcome to webora1sep' and 'Last Login Time 03/09/2015 18:01'. On the right side of the header, there are links for 'Alarms | Options | Help | Logout'. The main content area has a sidebar with 'Repository' and 'Search' sections, and a bottom section for 'OmniProcess' and 'Reports'. The 'Search' section contains a 'Folder Search' form with fields for 'Name' (containing 'a*'), 'Data Class Name' (set to 'Select a DataClass'), and buttons for 'Search' and 'Clear'. Below this is a 'Search Results' table with columns for 'Name', 'Modified Date', and 'Owner'. The table lists several entries, with the last one, 'webora1sep\Fileplan\Accounting Department\Account Payable', highlighted with a red border and checked in the 'Name' column. The table also includes a 'Save Report' and 'Properties' button at the top right. At the bottom of the page, there's a copyright notice: 'Copyright © 2015 Newgen Software Technologies Limited. All rights reserved.'

Name	Modified Date	Owner
webora1sep\Admin_Samples	03/09/2015 11:01	krishna
webora1sep\Account Opening	03/09/2015 12:57	Supervisor
<input checked="" type="checkbox"/> webora1sep\Fileplan\Accounting Department\Account Payable	03/09/2015 16:53	Supervisor2
<input type="checkbox"/> webora1sep\Fileplan\Accounting Department\Account Payable\Account Payable	03/09/2015 17:35	Supervisor2
<input type="checkbox"/> webora1sep\Account Payable	03/09/2015 17:35	Supervisor2

Figure: 6.12

7 OmniProcess

OmniProcess is used in case of distributed scanning and centralized processing of files wherein files constitutes documents for a business object like credit card application, Loan Application, Insurance Policy, etc. The documents of a file are uploaded through OmniScan in the first-look folder of a branch or a user and then checker accepts/rejects a file by updating the file status and accepted files are then available for access.

It provides a maker-checker scenario that allows creation of file, uploaded through OmniScan with minimal indexing by the maker and QC, verification and processing by the checker.

OmniProcess handles multi-user environment for processing file. While processing a file, all the data and images for each transaction are displayed to processing users. OmniProcess provides the user with features, such as searching, processing and viewing the documents of a transaction. Users can also set their preferences like dataclass indexes to be displayed in the search result list and they can also specify the values for dataclass fields in form of pick list. It also supports configuration of destination folder path for filing. It is mainly used in case of structured documents.

7.1 Features of OmniProcess:

- Access/search based on dataclass
- Users can set their preferences like dataclass indexes to be displayed in the search result list.
- Support for administrator defined pick list in data class fields.
- If file is in use, no other user can use that file unless it gets free from the first user.

NOTE:

For Configuring OmniProcess, refer to OmniDocs 9.1 Administration Manual.

7.2Using OmniProcess

Login to OmniDocs client and launch OmniProcess through OmniProcess link in the tools tab. OmniProcess tools tab contains a list of configurations created by the Admin. The right pane displays the properties of the selected configuration.

The different OmniProcess Configurations are:

- [Create File](#)
 - Configuration on Document
 - Configuration on Folder
 - Configuration on Custom
- [Process File](#)
 - Folder
 - Document
- [RMS Process](#)
 - Incoming Request
 - Incoming Items
 - Items with me
 - Outgoing Request
 - Items Transferred
- [Document Expiry Notification](#)

7.2.1 Create File

Depending on different configuration options, the Create File can have three different configurations:

- [Configuration on Document](#)
- [Configuration on Folder](#)
- [Configuration on Custom](#)

Configuration on Document

When Create File, of type Configuration on Document, is viewed by the user, the properties screen appears in the right pane. The Search Results section displays a list of documents which meet the search criteria configured by the Admin.

The screenshot shows a configuration screen for 'CreateFile_Document'. At the top, there is a note: 'CreateFile_Document will allow the user to add files at the desired destination, index them and add documents to them.' Below this, a 'Destination folder' field contains 'odcab21mar/1Test'. There are two input fields: 'Select Document' with a 'Browse...' button and 'Document Name'. An 'Add' button is located next to the name field. Below these, a 'Search Results' section displays a table with one row:

Name	DataClass	Modified Date	Size	Type	Pages	Owner
LighthouseLighthouse	Home_Loan	05/04/2017 10:02	549 KB	JPG	1	Supervisor

Navigation buttons '< Prev' and 'Next >' are visible at the bottom of the search results table.

Figure: 7.1

NOTE:

In case, **Data Security** Functionality checkbox is selected in the OmniDocs Admin Home screen, and **Secured** Data Classes are created. In that case, user can carry out the Document Search using only unsecured Data Fields. All Secured Data Fields will appear disabled.

1. **Destination folder** contains the path of the folder in which user will add files and documents and associate dataclass at the same time.
2. To add document:
 - i. Click on **Browse** (Choose File in case of Google Chrome).
 - ii. Choose File to Upload (Open dialog box in case of Google Chrome) dialog box appears.
 - iii. Select the desired file and click on **Open**.

- iv. Specify the **Document Name** (by default name of the selected file appears in the textbox).
- v. Click on **Add**.

NOTE:

The Data Class, selected by the Admin during Create File configuration, will be applied on the added documents.

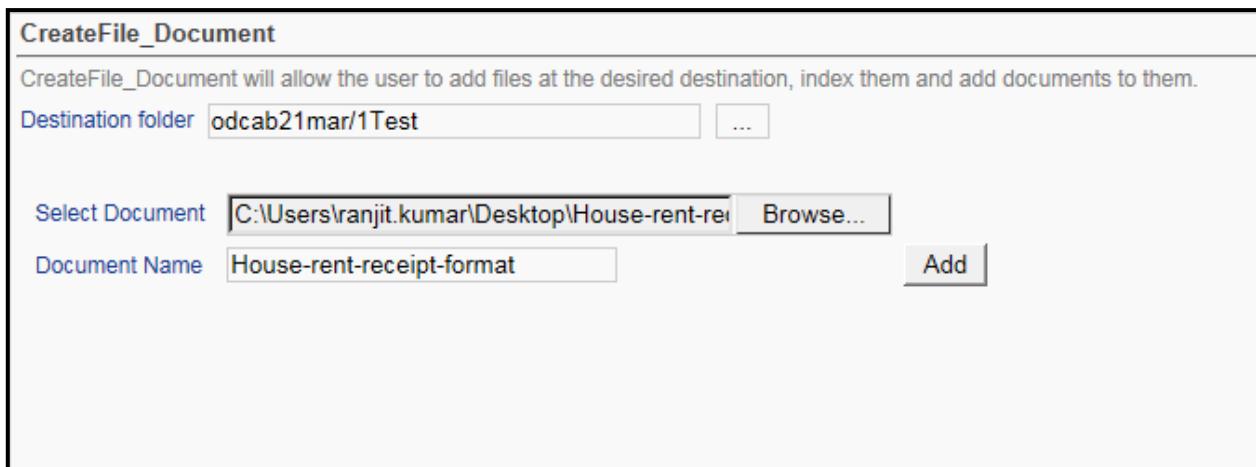


Figure: 7.2

- Multiple documents can be added using drag and drop. To do so, select multiple documents from your system->drag them->drop them in **Document Name** textbox.
- Drag and drop files here dialog box appears showing the a list of dropped documents.
- Click on **(Close)**.
- All the documents are now added in the selected folder.

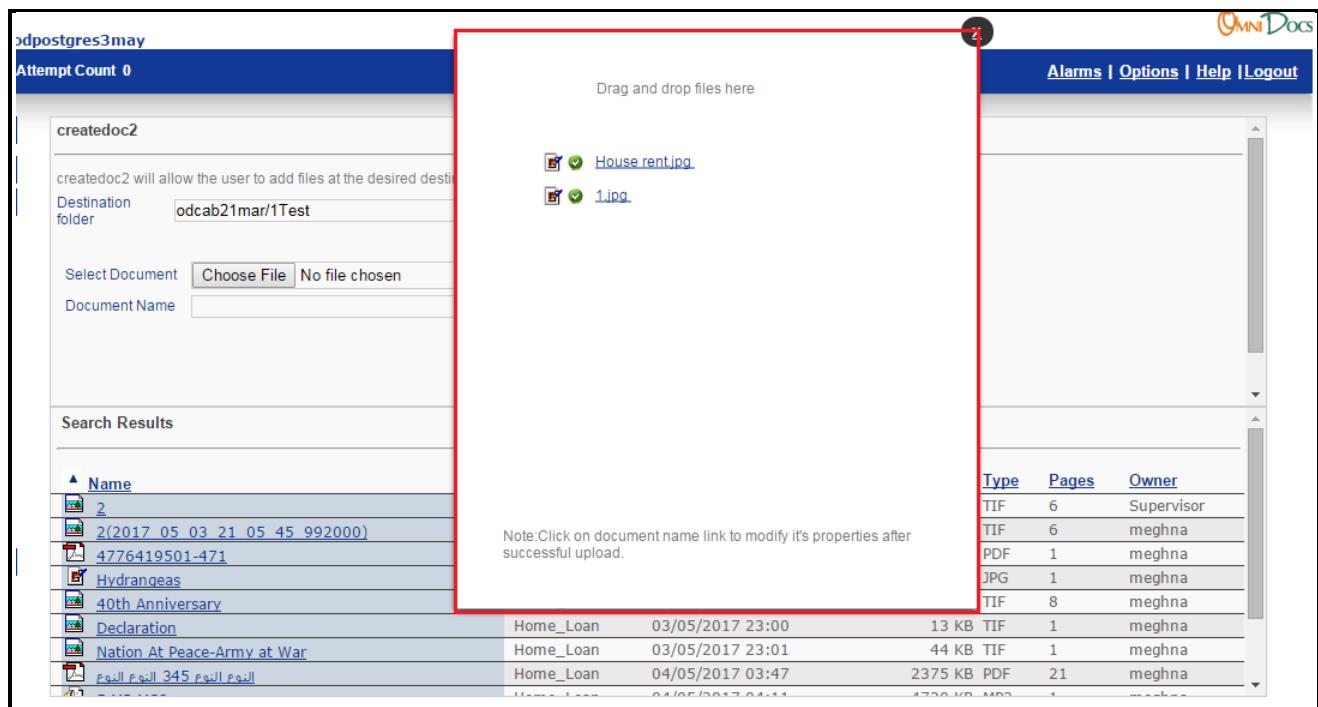


Figure: 7.3

vi. The selected document gets added and appears in the list of **Search Results**.

The screenshot shows the 'CreateFile_Document' interface. It includes a header with the title and a description: 'CreateFile_Document will allow the user to add files at the desired destination, index them and add documents to them.' Below this is a 'Destination folder' input field set to 'odcab21mar/1Test'. The main workspace shows the uploaded files 'LighthouseLighthouse' and 'House-rent-receipt-format'. A red box highlights this area. To the right is a 'Search Results' table.

Name	DataClass	Modified Date	Size	Type	Pages	Owner
LighthouseLighthouse	Home_Loan	05/04/2017 10:02	549 KB	JPG	1	Supervisor
House-rent-receipt-format	Home_Loan	05/04/2017 10:05	10 KB	PDF	1	Supervisor

Figure: 7.4

3. Working with the added documents:

- Click on the desired document name listed in **Name** row.
- The document appears in document viewer.

- iii. Left pane displays the custom action, if Custom URL is applied on Only Data Entry portion during configuration.

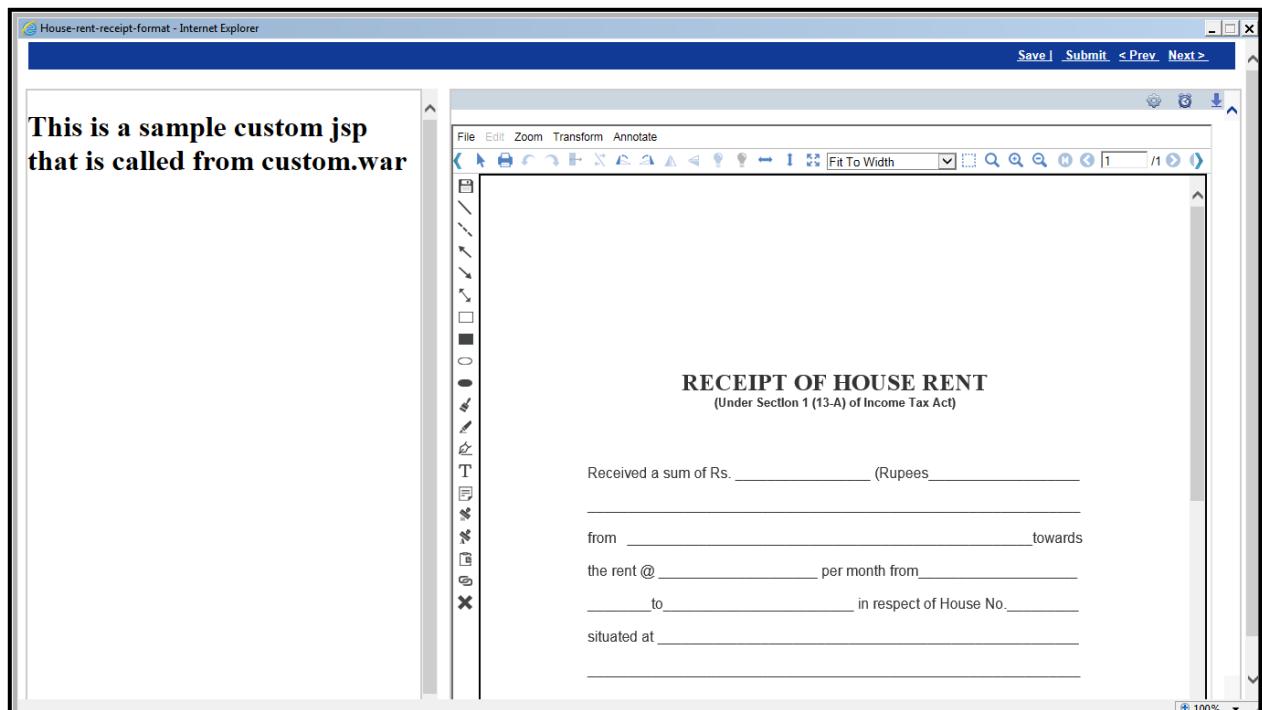


Figure: 7.5

- if Custom URL is applied on Full View:

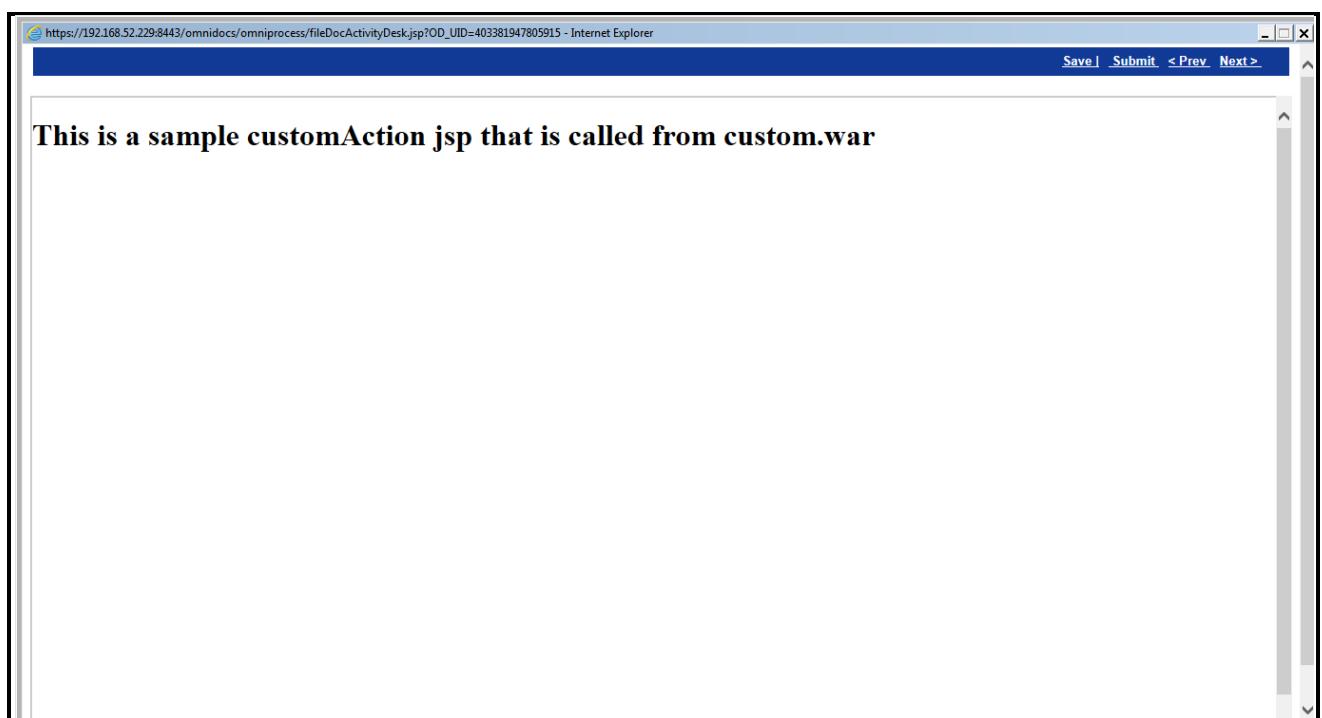
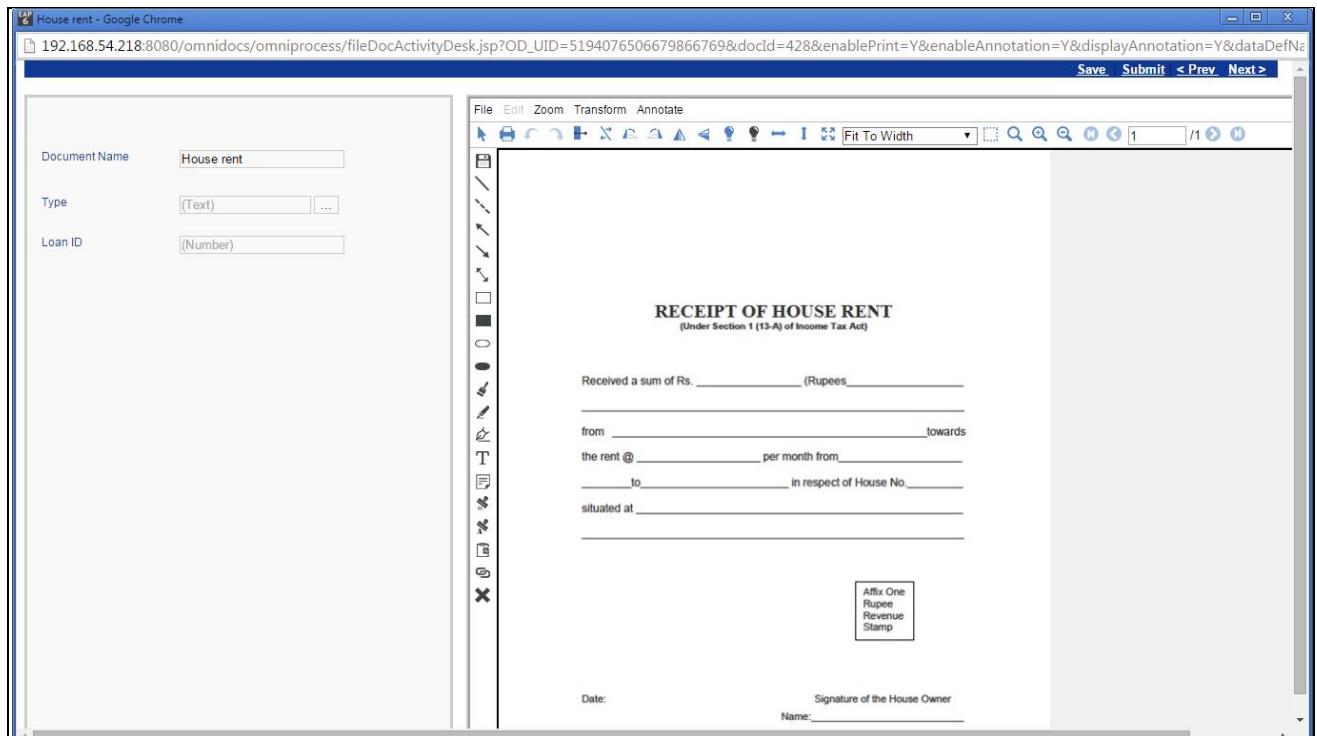


Figure: 7.6

- If Custom URL is not applied on the selected document, then the left pane of the screen displays the document properties.



Screen without custom URL

- iv. The right pane displays the document.
- v. The menu options are given at the top right corner of the screen.

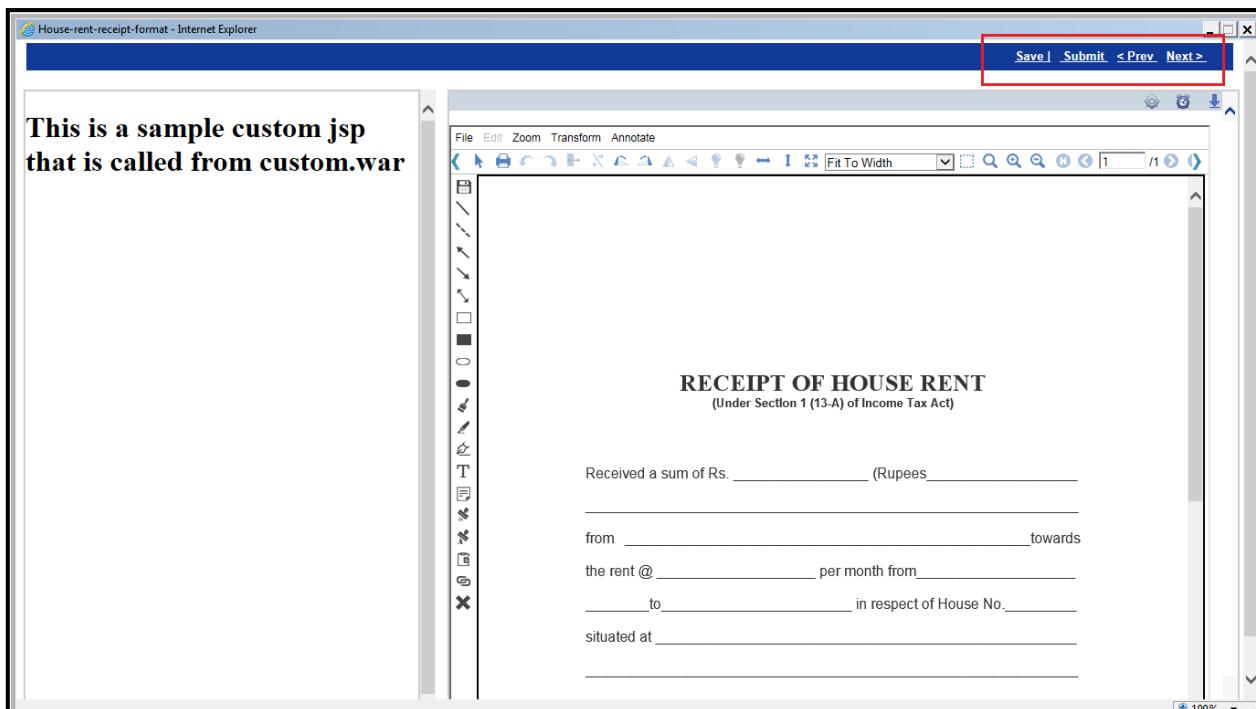


Figure: 7.7

- **Save:** Click to save the document.
- **Submit:** Click to submit the document. On submission, the document moves from destination folder to submission folder selected by the Admin.
- **Prev:** Click to open the previous document.
- **Next:** Click to open the next document.

Configuration on Folder

When Create File, of type Configuration on Folder, is viewed by the user, the properties screen appears in the right pane. It has the following options:

- Destination Folder Path
- DataClass

Create_Folder

Create_Folder will allow the user to add files at the desired destination, index them and add documents to them.

Destination folder

DataClass

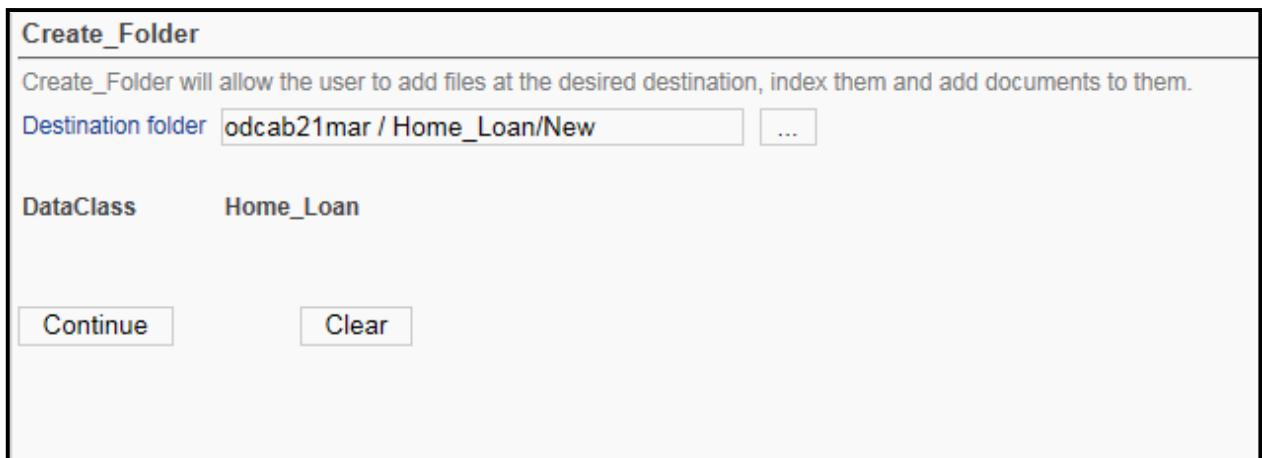


Figure: 7.8

It allows users to add files at the desired destination folder, index them, and add documents to them.

1. Click on **Continue**.
2. A screen appears where the user can enter the datafield values and add documents to the file.

Create File - Internet Explorer

Add File | Clear | Close

Home_Loan	Add Document(s)
ID(Text)	<input type="text"/>
Name(Text)	<input type="text"/>
Age(Number)	<input type="text"/>
Loan_Amt(Number)	<input type="text"/>
Interest_Amt(Decimal)	<input type="text"/>
Birth_Date(DD/MM/YYYY)	<input type="text"/> <input type="button" value="..."/>
Status(Text)	<input type="text"/>

Document-1
• Click Here to add Documents
Document Name

[Add More Document\(s\)](#)

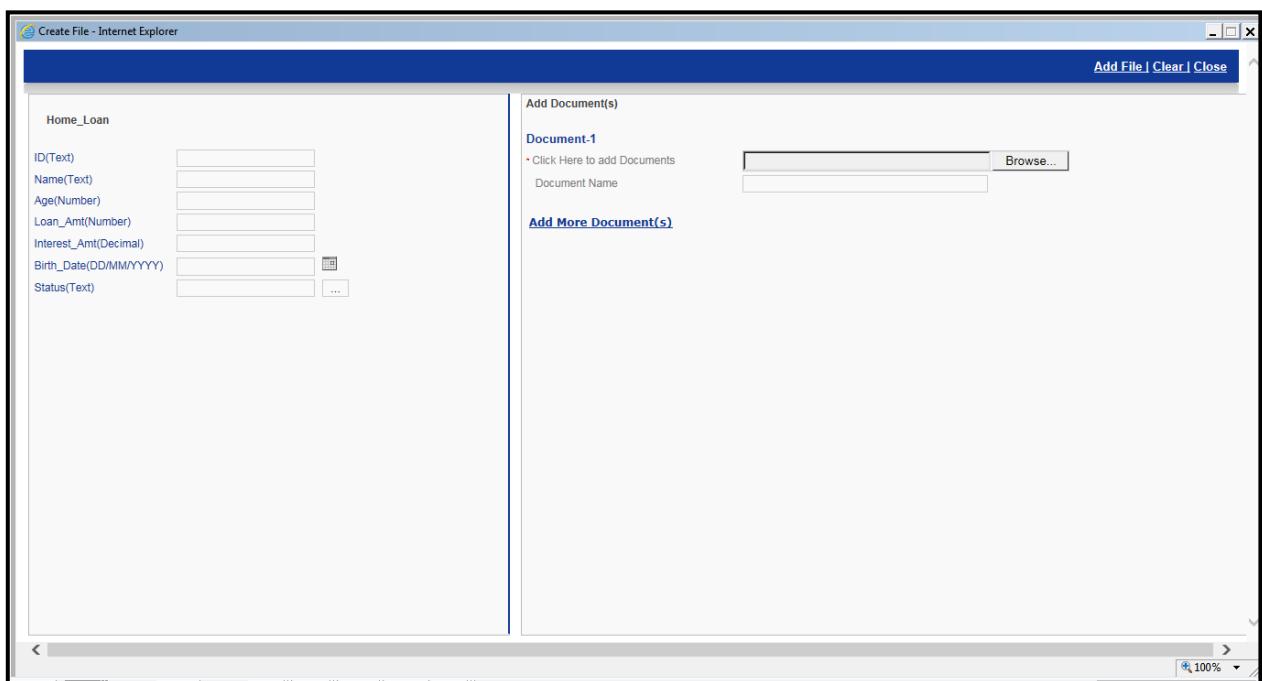


Figure: 7.9

Configuration on Custom

When Create File, of type Configuration on Custom, is viewed by the user, the configured full customize create file configuration is displayed in the right pane.

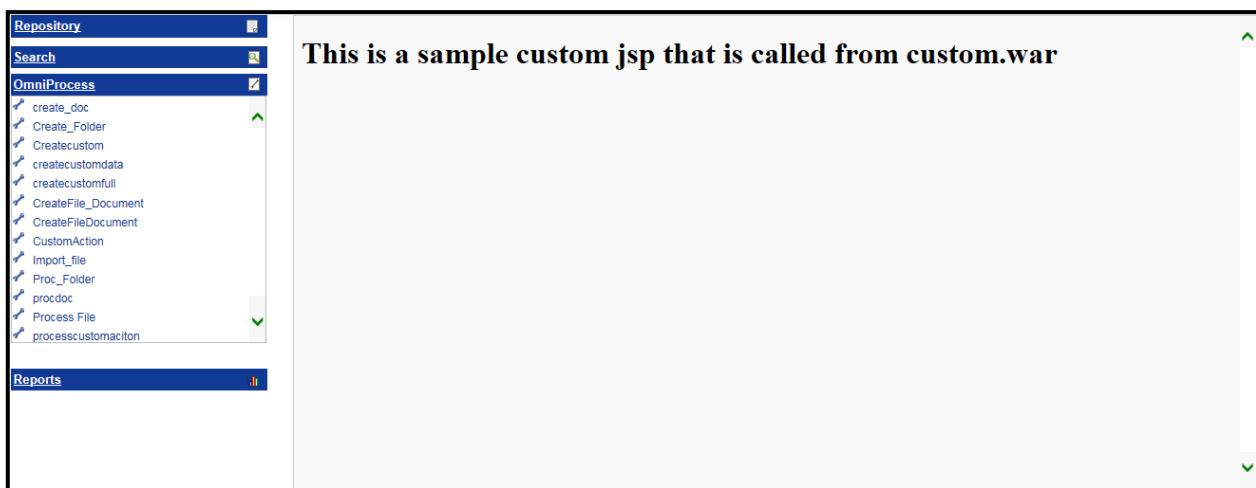


Figure: 7.10

7.2.2 Process File

Depending on different configuration options, the Process File can be configured for:

- [Folder](#)
- [Document](#)

Process File-Folder: This is used to search and file business folders into a specified location.

To search folders, enter the following details:

- **Search in:** Select the folder where you need to perform the searching.
- **Include SubFolder:** Select this checkbox to include sub folder in the search.
- **Name:** Provide the name of the search to be performed.
- **Date:** Depending on the configuration, one of the following two options appears in this section:

- **Date of Folder Creation/Modification/Accessed (option depends on configuration):** Specify the date range between which the folder was created/modified/accessed.
- **Folder Creation in Previous (Days/Weeks/Months):** Specify the time period (in Days/Weeks/Months) during which the folder was created/modified/accessed.
- **Select DataClass from the drop-down list.** This dropdown list is not available if a particular DataClass was already selected during configuration by the Admin.
- **Advanced Search:** Select this checkbox to get the fields of the selected dataclass in dropdown format. If not selected, the dataclass fields appear in tabular format.

The screenshot shows the OmniProcess search interface. The top navigation bar includes links for OD Web Desktop, MasterDesktop, RMS, Hi Supervisor2, Welcome to nitesh123, Last Login Time 22/07/2015 12:57, Alarms, Options, Help, and Logout. The main menu on the left has sections for Repository, Search, and OmniProcess, with sub-options like create_file, Process File, and Document Expiry Notification. The central search area is titled 'Process File' and contains a search input field with 'nitesh123'. It includes fields for General (Name), Date (Folder Modified Between), and Data Class List (Account Details). Below these are three rows of search criteria: Account Number (Equals), Account Type (Equals), and IFSC (Equals). There are also 'Search' and 'Clear' buttons. A note at the bottom states: 'Process File can be used to search and file business folders into specified location. Integrated view of folder property, documents in folder and destination path for filing is provided. It provides a maker-checker scenario that allow processing of transactions uploaded through OmniScan with Upload and minimal Indexing by the maker, and QC , Verification and Processing by the checker'. The footer copyright notice reads: 'Copyright © 2015 Newgen Software Technologies Limited. All rights reserved.'

Figure: 7.11

- Click **Search** to search the folder(s). The searched folders appears as follows:

OmniProcess

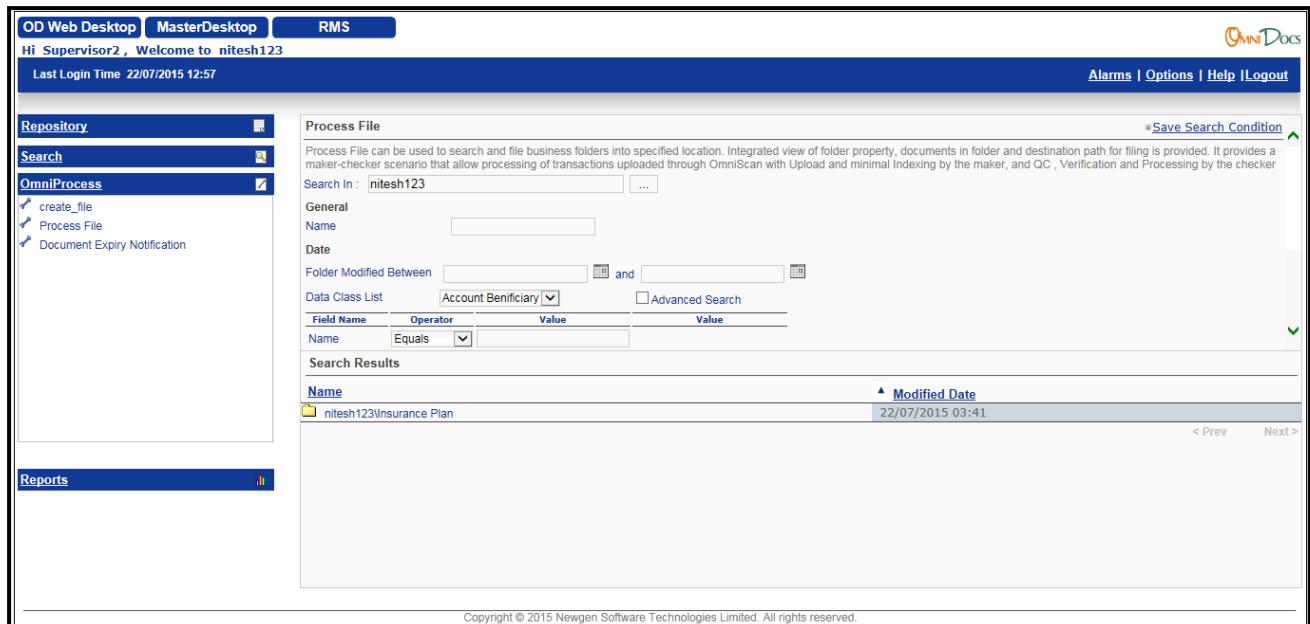


Figure: 7.12

- Select any folder to view the attached documents in it.

Figure: 7.13

- The attached documents in the selected folder appear under the Document List with details like Document Creation Date. Here, user can individually reject the

document(s) by clicking on <**Reject**> link, or, can accept or reject the entire folder by clicking on Accept or Reject links on the top-right section.

NOTE:

- The opened attached document can be printed by clicking **Print icon**, as highlighted in **Figure: 7.13**.
 - The **Print** icon will be available only when **JRE Free Mode** is **disabled**.
-

Process File-Document: This is used to file business documents into specified location.

Integrated view of document property, document view and filing view is provided. To search documents, enter the following details:

1. **Search in:** Select the folder where you need to perform the document search.
2. **Include SubFolder:** Select this checkbox if document has to be searched in sub folders also.
3. **Name:** Provide the name of the search to be performed.
4. **Date:** Depending on the configuration, one of the following two options appears in this section:
 - **Document Created/Modified/Accessed (option depends on configuration):** Specify the date range between which the document was created/modified/accessed.
 - **Document Creation/Modification/Accessed in Previous (Days/Weeks/Months):** Specify the time period (in Days/Weeks/Months) during which the folder was created/modified/accessed.
5. **DataClass:** DataClass section is given below the Date section. Name of the dataclass configured by the Admin appears in this section.
6. **Advanced Search:** Select this checkbox to get the fields of the selected dataclass in dropdown format. If not selected, the dataclass fields appear in tabular format.

This screenshot shows the 'ProcessFileAll' search interface. At the top right is a 'Save Search Condition' link. Below it is a search bar with 'Search In : orameghna12apr' and a 'Include SubFolder' checkbox checked. Under 'General' settings, there are fields for 'Name' (containing 'S*') and 'Date' (modified in previous 1 month). A 'Home_Loan' section contains a table with columns 'Field Name', 'Operator', and 'Value'. It includes rows for 'Loan ID' (LessThan), 'name' (Contains), and 'Type' (Contains). At the bottom are 'Search' and 'Clear' buttons.

Figure: 7.14

- Click **Search** to search the documents. The searched documents appears in the Searched Results section.

This screenshot shows the search results page for 'ProcessFileAll'. At the top right is a 'Save Search Condition' link. The search bar shows 'Search In : orameghna12apr' and the 'Include SubFolder' checkbox is checked. Under 'General' settings, there are fields for 'Name' (containing 'S*') and 'Date' (modified in previous 1 month). A 'Home_Loan' section contains a table with columns 'Field Name', 'Operator', and 'Value'. It includes a row for 'Loan ID' (LessThan). Below this is a 'Search Results' section. It lists three documents in a table:

Name	Modified Date
Sample that is having space	13/04/2017 09:55
Sydney Barlow Property Consultants	13/04/2017 09:55

At the bottom right are 'Document Operations' buttons for 'Prev' and 'Next'.

Figure: 7.15

- Document Operations:** Depending on the configuration created for Process File-Document, the following three types of operations can be performed on the searched documents:
 - Standard Action (this name can be any name as given by the Admin during configuration)

- Assign to FilePlan (this name can be any name as given by the Admin during configuration)
- Custom Action (this name can be any name as given by the Admin during configuration)

To perform the above actions (on multiple documents at a time):

- i. Select the desired documents.
- ii. Point the mouse pointer on **Document Operations** link.
- iii. Click on **StandardAction/AssignToFilePlan/CustomAction** to perform Standard Action/ Assign to FilePlan/ Custom Action, respectively.

Search Results		
Name	Modified Date	Document Operations
<input checked="" type="checkbox"/> 1	08/05/2017 15:44	<input type="button" value="StandardAction"/>
<input checked="" type="checkbox"/> Declaration	13/04/2017 09:52	<input type="button" value="AssignToFilePlan"/>
<input checked="" type="checkbox"/> doc2	04/05/2017 08:49	<input type="button" value="CustomAction"/>
<input type="checkbox"/> HD-Wallpapers1	13/04/2017 09:55	
<input type="checkbox"/> Henkel Doc	13/04/2017 09:52	
<input type="checkbox"/> House-rent-receipt-format	10/05/2017 14:21	
<input type="checkbox"/> Journey to Lahore	13/04/2017 12:54	
<input type="checkbox"/> test1	10/05/2017 14:20	

Figure: 7.16

- iv. The selected documents are filed successfully, showing the following message:

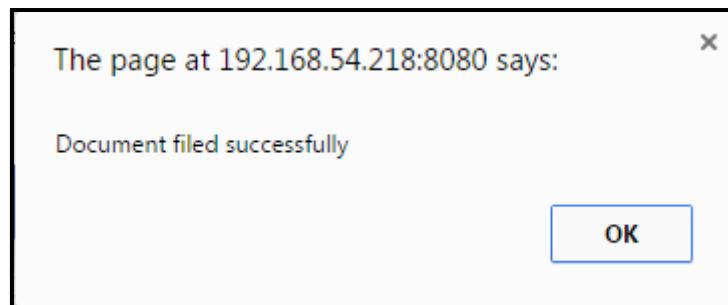


Figure: 7.17

- v. Click on **OK** to close the message box.

To perform the above actions (on single document at a time):

- i. To perform the above stated Document Operations on a single document, clicking on any particular document listed in Search Results.
- ii. The selected document opens in document viewer as shown below:

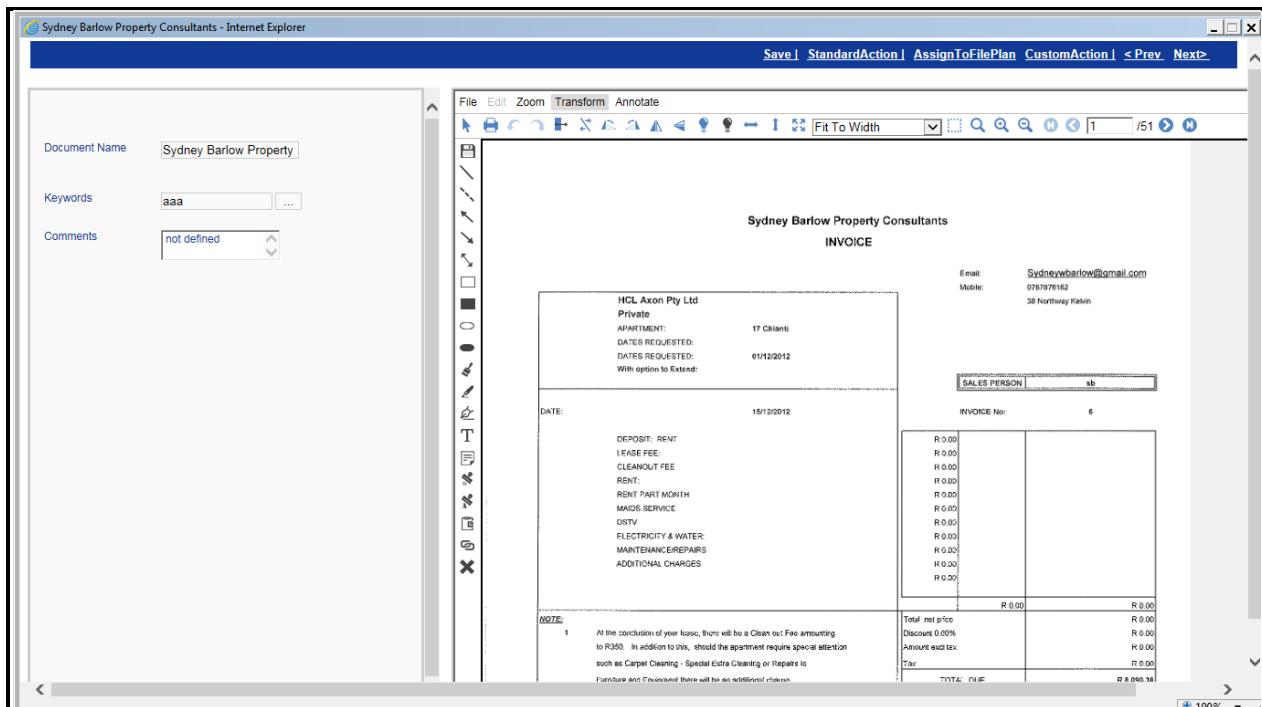


Figure: 7.18

- iii. The menubar options are given at the top right corner of the screen.
 - Save, <Prev and Next> are permanent options. The other options depend on configuration and appear as named by the Admin.
 - The left pane of the screen displays the properties associated with the selected document and is used for performing data entry.
- iv. **Save:** Click to save the document.
- v. Click on **StandardAction** to apply the configuration of Standard Action. The opened document is processed as per the configuration, moves to the configured destination folder and the next document in the queue comes for processing.
- vi. Click on **AssignToFilePlan** to apply the configuration of Assign to FilePlan. Assign to File Plan (of RMS) screen appears.

This interface is used to assign documents to a file part in a file plan. The document will be filed as a record in the open file part of the selected file.

The screenshot shows the 'Assign To File Plan' dialog box from the OMNI Docs RMS system. At the top left is the logo 'OMNI Docs RMS Record Management System'. At the top right is an 'i' icon. The main title 'Assign To File Plan' is centered above the input fields. The form contains several input fields:

- Name:** Chrysanthemu
- File:** A (dropdown menu)
- FilePart:** A (dropdown menu)
- DataClass:** testdata (dropdown menu)
- id:** 1 (text input)
- name:** (empty text input)

Below these fields is a section titled 'Physical Properties' containing three radio buttons:

- Physical Copy with me
- Physical Copy with RMU
- Physical Copy don't Exist

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

Assign to File Plan

- Select the file in which the document is to be placed from the **File** combo box.
- The files that are a part of the selected file plan are displayed. The file must have one open file part for the document to be placed in it.

NOTE:

By default, the File and FilePart fields are pre-filled with the options selected by the Admin during configuration. You can change them as required.

- The **Data Class** field is not enabled as it is set by the Admin during configuration.

- Select **Physical copy with me** option, if the filed item has got a corresponding physical copy.
- Select **Physical copy with RMU** option if the physical copy is with the RMU.
- Select **Physical Copy don't exist** option if the filed item does not have a corresponding physical copy.

NOTE:

By default, Physical copy with RMU option is selected. You can change it to any other option as required.

- Click **OK** to assign the document to the selected file plan according to the selected criteria, else click **Cancel**.
- vii. Click on **CustomAction** to apply the configuration of Custom Action.
- Message: Custom Action Implemented Successfully appears just below the menu bar.
 - Click on **Close** link to close the message.
- viii. **Prev**: Click to open the previous document.
- ix. **Next**: Click to open the next document.

7.2.3 RMS Process

RMS Process, configured by OmniDocs Admin, allows the logged-in user to perform basic functions of RMS (Record Management System). Depending on different options selected for configuration, all the possible actions are tabled below:

Type	Action
Incoming Request: It displays a list of all the incoming requests.	<ul style="list-style-type: none"> Generate Transfer Note: It is used to dispatch items to another user. Reject: It is used reject the incoming request(s).
Incoming Items: It displays a list of granted requests for the logged-in user. The user can either receive the items or reject them. In case the user receives the items, they move from this queue to Item with me list.	<ul style="list-style-type: none"> Reject: It is used reject the incoming items. Receive: It is used to receive an item.
Items with me: It displays a list all the items accepted by the logged-in user.	<ul style="list-style-type: none"> Generate Transfer Note: It is used to dispatch items to another user. Return: It will be used when the logged-in user wants to return back the item to the sender.
Outgoing Request: It displays a list of all the requests made by the logged-in user.	<ul style="list-style-type: none"> ReRequest: It is used to re-send any request. Remind: It is used to remind the other user for action on request for the requested item. Delete: It is used to delete an outgoing request.
Items Transferred: It displays a list of all the items which have been transferred by the logged-in user. Transfer of an item can take place due to : <ul style="list-style-type: none"> Returning a requested item Transferring an item to a user who had requested for it. 	<ul style="list-style-type: none"> No Action: No action can be taken on the transferred items.

Working with Incoming Request

1. Click on RMS Configuration created for **Incoming Request**.
2. The following screen appears.

Item Name	RequestNo	Priority	RequestedOn	RequestedBy	DateRequired	Operations
0000002	AAAW00023	Medium	2017-04-19	Supervisor2	2017-04-19	2017-04-19
LIC Policy 867	AABB00028	Medium	2017-04-26	shekhar	2017-04-26	2017-05-06
test-amitesh	AABD00030	Medium	2017-04-26	Supervisor2	2017-04-26	2017-04-26
Journey to Lahore	AABF00032	Medium	2017-05-01	Supervisor	2017-05-01	2017-05-03

Figure: 7.19

3. Based on the search criteria configured in OmniDocs Admin module, the screen displays Search Results of the Incoming Request.

NOTE:

Message "No results for this search criteria" appears if there is no record to match the configured search criteria. You can close the message by clicking on **Close** link.

4. To perform a new search:
 - i. Specify the search criteria as listed below. The availability of search criteria depends on how these are configured by the Admin. All the possible options are given in this table.

Type	Search Criteria	
Incoming Request	General: Specify the general terms	<ul style="list-style-type: none"> Priority: Select the desired priority from the dropdown list. Requested By: Select the desired user to search the incoming requests of this user.
	Requested On: Specify this criterion to search incoming request on the basis of fixed selection (in terms of fixed time period) or range selection (in terms of date range).	<ul style="list-style-type: none"> Fixed Selection: Provide fixed selection criterion in terms of previous (number of) days, weeks or months to search on the basis of requests which were made in the previous number of days, weeks or months. Range Selection: Specify this criterion to search on the basis of date range.
	Date Required: Specify this criterion to search on the basis of dates.	<ul style="list-style-type: none"> Fixed Selection: Specify this criterion to search on the basis of requests which were made in the previous number of days, weeks or months. Range Selection: Specify this criterion to search on the basis of date range.
	Return Date: Specify this criterion to search on the basis of return date.	<ul style="list-style-type: none"> Fixed Selection: Specify this criterion to search on the basis of the requests which were returned in the previous number of days, weeks or months. Range Selection: Specify this criterion to search on the basis of date range.

ii. After specifying the required search criteria, click on **Search**.

The screenshot displays a search interface titled "1. Incoming Request". Under the "General" section, there is a dropdown menu set to "Medium" and a field labeled "RequestedBy" containing "Supervisor2". Below this, under the "Date" section, there is a "Date Required Between" field showing "01/04/2017" and "17/05/2017". At the bottom of the interface are two buttons: "Search" and "Clear".

Figure: 7.20

iii. The search results appears as shown below.

1. Incoming Request

General

Priority	<input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Medium"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="RequestedBy"/>	<input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Supervisor2"/> <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="..."/>
----------	--	---

Date

Date Required Between and

Search Results

	Item Name	RequestNo	Priority	RequestedOn	RequestedBy	DateRequired	ReturnDate	Operations
<input type="checkbox"/>	00000002	AAAW00023	Medium	2017-04-19	Supervisor2	2017-04-19	2017-04-19	< Prev <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Next>"/>
<input type="checkbox"/>	test-amitesh	AABD00030	Medium	2017-04-26	Supervisor2	2017-04-26	2017-04-26	< Prev <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Next>"/>

Figure: 7.21

5. To perform Operations on Search Results:

i. To **Generate Transfer Note**:

- Select the desired **Item Name** listed in Search Results.
- Point the mouse pointer on **Operations** link.
- Click on **Generate Transfer Note**.

Search Results

	Item Name	RequestNo	Priority	RequestedOn	RequestedBy	DateRequired	ReturnDate	Operations
<input type="checkbox"/>	00000002	AAAW00023	Medium	2017-04-19	Supervisor2	2017-04-19	2017-04-19	< Prev <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Next>"/>
<input checked="" type="checkbox"/>	LIC Policy 867	AABB00028	Medium	2017-04-26	shekhar	2017-04-26	2017-05-06	Re Reject
<input type="checkbox"/>	test-amitesh	AABD00030	Medium	2017-04-26	Supervisor2	2017-04-26	2017-04-26	Generate Transfer Note
<input type="checkbox"/>	Journey to Lahore	AABF00032	Medium	2017-05-01	Supervisor	2017-05-01	2017-05-03	< Prev <input style="border: 1px solid #ccc; padding: 2px 5px;" type="button" value="Next>"/>

Figure: 7.22

- Generate Transfer Note screen appears.

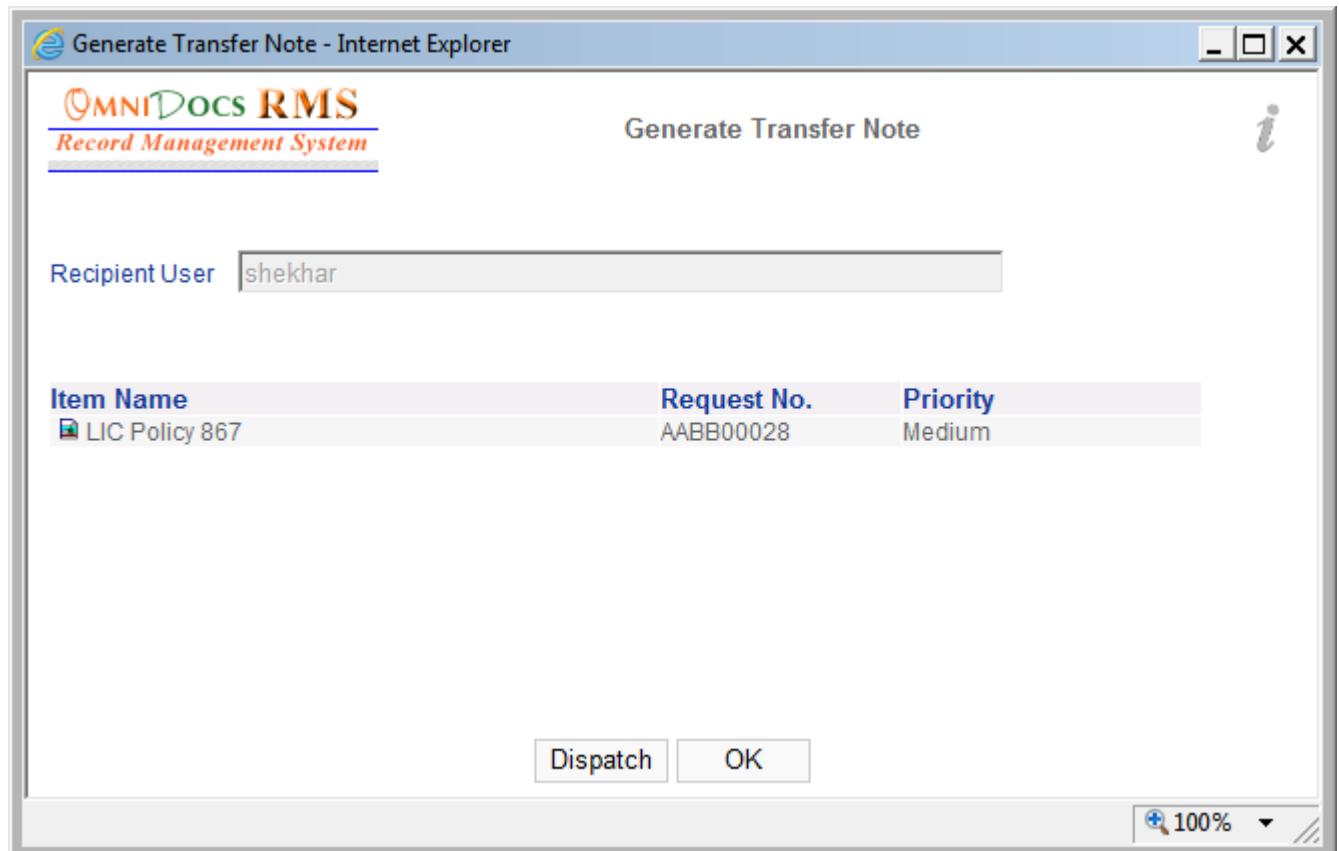


Figure: 7.23

- To learn **how to Generate Transfer Note**, refer to section **11.2.1 Generate Transfer Note of RMS 2.5 Reference Manual**.
 - To learn **how to Dispatch an Item**, refer to section **11.2.2 Dispatch Details of RMS 2.5 Reference Manual**.
 - Once the Generate Transfer Note operation of the selected item is completed, it is removed from the list of search results.
- ii. To **Reject** an incoming request:
- Select the desired **Item Name** listed in Search Results.
 - Point the mouse pointer on **Operations** link.
 - Click on **Reject**.

Search Results						
	Item Name	RequestNo	Priority	RequestedOn	RequestedBy	DateRequired
<input type="checkbox"/>	LIC Policy 867	AABB00028	Medium	2017-04-26	shekhar	2017-04-26
<input type="checkbox"/>	test-amitesh	AABD00030	Medium	2017-04-26	Supervisor2	2017-04-26
<input checked="" type="checkbox"/>	Journey to Lahore	AABF00032	Medium	2017-05-01	Supervisor	2017-05-01

Operations
GenerateTransfer
Reject

< Prev Next>

Figure: 7.24

- Reject Transfer Requests screen appears.

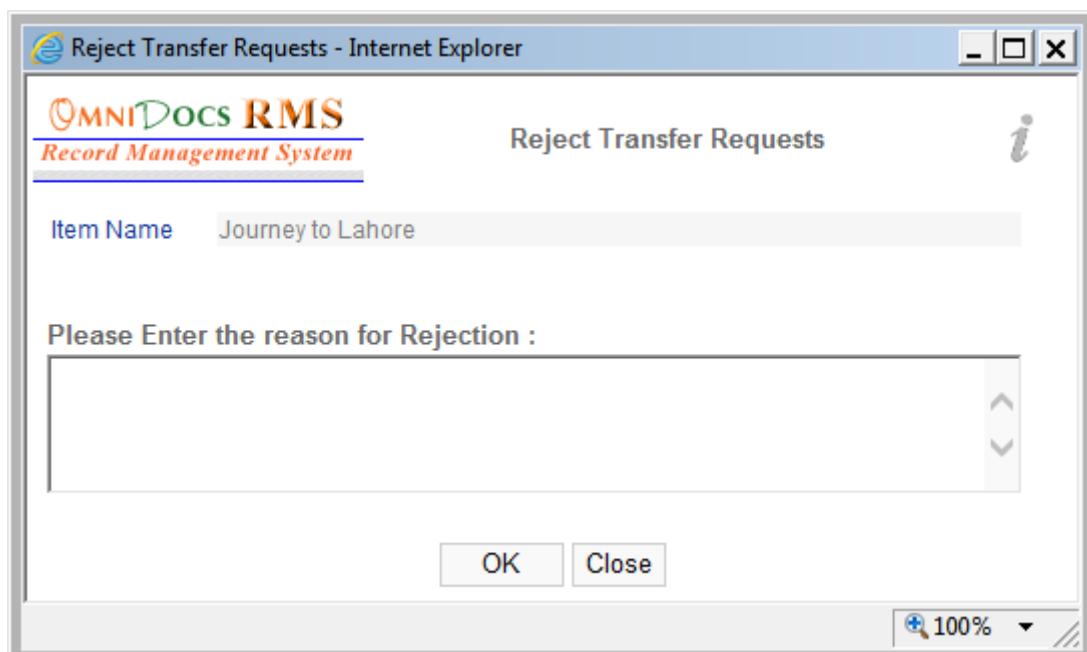


Figure: 7.25

- To learn **how to Reject Transfer Requests**, refer to section **11.3.1.2 Reject Incoming Document Requests of RMS 2.5 Reference Manual**.
- Once the Reject operation of the selected item is completed, it is removed from the list of search results.
- iii. Clicking on an **Item Name**, listed in Search Results, opens the properties screen of that item.

Working with Incoming Items

1. Click on RMS Configuration created for **Incoming Items**.
2. Depending on the configuration settings, the following screen appears.

The screenshot shows the OmniProcess RMS interface. On the left, there's a navigation sidebar with sections like 'Repository', 'Search', and 'OmniProcess'. Under 'OmniProcess', several items are listed: '1. Incoming Request', '2.Incoming Items' (which is expanded), '3. Items with me', '4. Outgoing Request', 'CC Process', 'Credit Card Approval', 'Document Checker', 'Document Upload', 'P', 'PrFileDocConfFPI', 'Process File', 'ProcessFileFolderConf', and 'testrequest'. Below this is a 'Reports' section. The main content area is titled '2.Incoming Items' and contains two tabs: 'General' and 'Date'. Under 'General', there are fields for 'SentBy' (with a dropdown menu) and 'Mode' (with a dropdown menu). Under 'Date', there are fields for 'SentOn Between' (with date pickers) and 'and' (with a date picker). Below these are 'Search' and 'Clear' buttons. The 'Search Results' tab is selected, showing a table with columns: Item Name, Transfer No., Sent By, Sent On, and Mode. Two entries are listed: 'newdoc' (Transfer No. 00020AAA, Sent By Supervisor, Sent On 2017-04-24, Mode Rejected) and 'User1' (Transfer No. 00021AAAU, Sent By Supervisor, Sent On 2017-04-24, Mode Rejected). At the bottom right of the table are '< Prev' and 'Next>' buttons. The top right of the interface has links for 'Alarms | Options | Help | Logout'.

Figure: 7.26

3. Based on the search criteria configured in OmniDocs Admin module, the screen displays Search Results of the Incoming Items.

NOTE:

Message "No results for this search criteria" appears if there is no record to match the configured search criteria. You can close the message by clicking on **Close** link.

4. To perform a new search:
 - i. Specify the search criteria as tabled below. The availability of search criteria depends on how these are configured by the Admin. All the possible options are given in this table.

Type	Search Criteria	
Incoming Items	General: Specify the general terms.	<ul style="list-style-type: none"> • Sent By: Select the desired user to search the incoming items sent by this user • Mode: Select the desired mode from the dropdown to search on the basis of the modes of the incoming items. The different modes are: Requested, Forwarded, Rejected, Moved and Returned.
	Sent On: Specify this criterion to search incoming items on the basis of fixed selection (in terms of fixed time period) or range selection (in terms of date range)	<ul style="list-style-type: none"> • Fixed Selection: Specify the fixed selection criterion to search on the basis of previous number of days, weeks or months in which items were received. • Range Selection: Specify date range to search incoming items received between two dates.

ii. After specifying the required search criteria, click on **Search**.

The screenshot displays a search interface titled "2.Incoming Items". It includes the following fields:

- General**: A dropdown menu showing "SentBy" with "Supervisor" selected.
- Mode**: A dropdown menu showing "Rejected" selected.
- Date**: A date range selector labeled "SentOn Between" with the values "01/04/2017" and "02/05/2017" entered, flanked by calendar icons.
- Buttons**: Two buttons at the bottom left: "Search" and "Clear".

Figure: 7.27

iii. The search results appears as shown below:

2.Incoming Items

General
SentBy <input type="text" value="Supervisor"/> ... Mode <input type="button" value="Rejected"/>
Date
SentOn Between <input type="text" value="01/04/2017"/> <input type="button"/> and <input type="text" value="02/05/2017"/> <input type="button"/>
<input type="button" value="Search"/> <input type="button" value="Clear"/>

Search Results

Item Name	Transfer No.	Sent By	Sent On	Mode	Operations
<input type="checkbox"/> newdoc	00020AAAT	Supervisor	2017-04-24	Rejected	
<input type="checkbox"/> User1	00021AAAU	Supervisor	2017-04-24	Rejected	

[< Prev](#) [Next >](#)

Figure: 7.28

5. To perform Operations on Search Results:

i. To **Receive** an incoming item:

- Select the desired **Item Name** listed in Search Results.
- Point the mouse pointer on **Operations** link.
- Click on **Receive**.

Search Results

Item Name	Transfer No.	Sent By	Sent On	Mode	Operations
<input checked="" type="checkbox"/> newdoc	00020AAAT	Supervisor	2017-04-24	Rejected	<input type="button" value="Receive"/> <input type="button" value="Reject"/>
<input type="checkbox"/> User1	00021AAAU	Supervisor	2017-04-24	Rejected	

[< Prev](#) [Next >](#)

Figure: 7.29

- Items Received Successfully message appears.

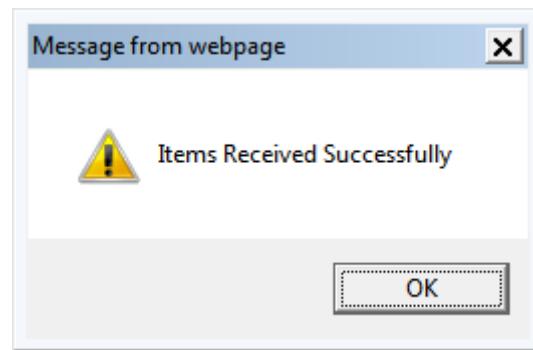


Figure: 7.30

- Click **OK** to close the message box.

NOTE:

The received item moves to **Item with me** list from **Incoming Items** list.

- ii. To **Reject** an incoming item:

- Select the desired **Item Name** listed in Search Results.
- Point the mouse pointer on **Operations** link.
- Click on **Reject**.

Search Results					
<input checked="" type="checkbox"/> Item Name	Transfer No.	Sent By	Sent On	Mode	Operations
<input checked="" type="checkbox"/> User1	00021AAAU	Supervisor	2017-04-24	Receive	Reject
				Reject	
< Prev					Next>

Figure: 7.31

- Generate Transfer Note screen appears.

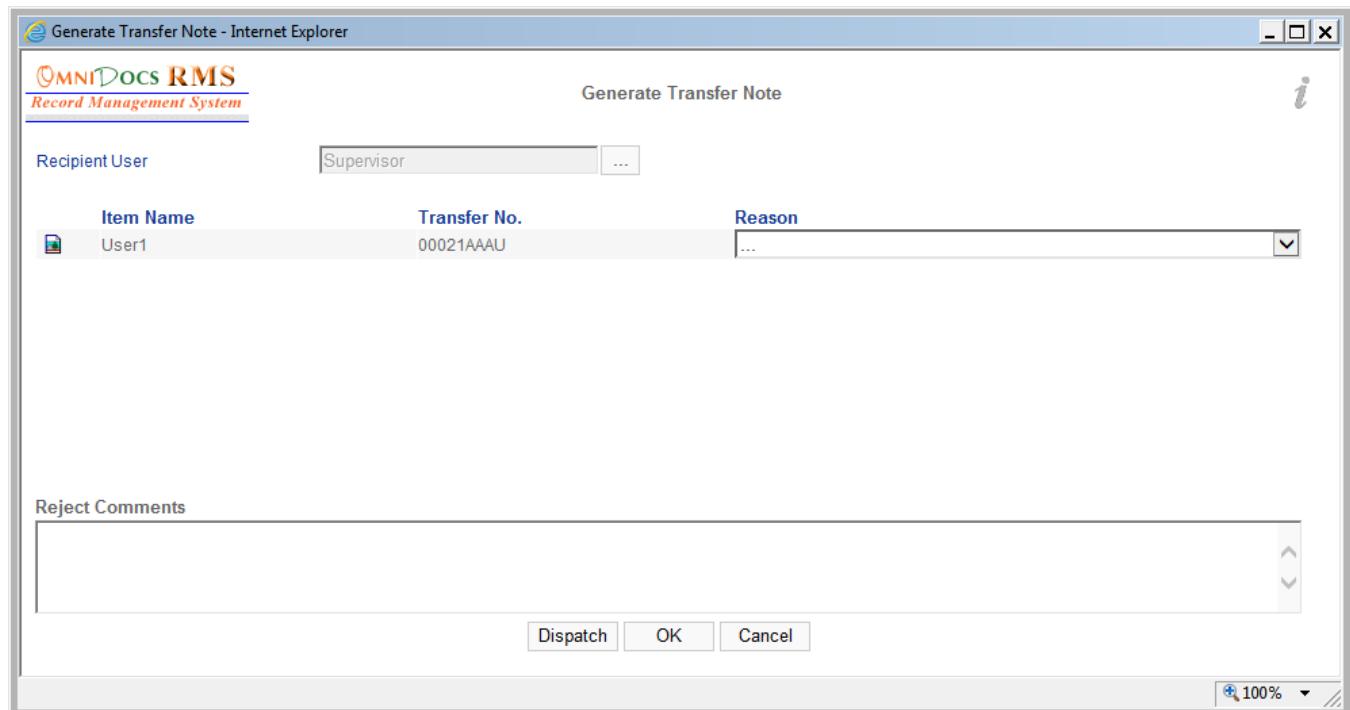


Figure: 7.32

- For remaining steps, refer to section **11.3.3.1 Reject Incoming Items of RMS 2.5 Reference Manual.**

NOTE:

The rejected item is sent back to the user who had made the item request and is no longer listed in **Incoming Items** list.

- iii. Clicking on an **Item Name**, listed in Search Results, opens the properties screen of that item.

Working with Items with me

1. Click on RMS Configuration created for **Items with me**.
2. Depending on the configuration settings, the following screen appears.

The screenshot shows the OmniProcess application interface. On the left, there is a navigation sidebar with sections like 'Repository', 'Search', and 'OmniProcess'. Under 'OmniProcess', several items are listed: 1. Incoming Request, 2. Incoming Items, 3. Items with me, 4. Outgoing Request, CC Process, Credit Card Approval, Document Checker, Document Upload, p, PrFileDocConfFPI, Process File, ProcessFileFolderConf, and testrequest. Below this is a 'Reports' section. The main content area is titled '3. Items with me' and contains search criteria fields: 'Sent By' (dropdown), 'Mode' (dropdown), 'Search On' (dropdown set to 'Record'), 'Date Received Between' (date range input fields), 'Search' (button), and 'Clear' (button). Below these is a 'Search Results' table:

Item Name	Request No.	Transfer No.	Date Received	Granted Till
840557490-Proposal Enclosures - Copy - Copy	41		2017-04-14	2017-04-24
Easy	AAA000015	46		2017-04-24
Journey to Lahore		1		2017-04-23
LIC Policy 865840557490	42			2017-04-24
LIC Policy 867		22		2017-04-24
RMS		21		2017-04-24
amitesh	AAAL00012	43	2017-04-14	2017-04-14

Figure: 7.33

3. Based on the search criteria configured in OmniDocs Admin module, the screen displays Search Results of the Items with me.

NOTE:

Message "No results for this search criteria" appears if there is no record to match the configured search criteria. You can close the message by clicking on **Close** link.

4. To perform a new search:
 - i. Specify the search criteria as tabled below. The availability of search criteria depends on how these are configured by the Admin. All the possible options are given in this table.

Type	Search Criteria	
Items with me	General: Specify the general terms.	<ul style="list-style-type: none"> • Sent By: Select the desired user to search the incoming items sent by this user. • Mode: Select the desired mode from the dropdown to search on the basis of the modes of the incoming items. The different modes are: Requested, Forwarded, Rejected, Moved and Returned.
	Date Received: Select this option if you want to configure the search process using day/date	<ul style="list-style-type: none"> • Fixed Selection: Specify the fixed selection criterion to search on the basis of previous number of days, weeks or months in which items were received • Range Selection: Specify date range to search

	on which items were received.	incoming items received between two dates.
	Return Date: Select this option if you want configure the search process using day/date on which items were returned.	<ul style="list-style-type: none"> Fixed Selection: Specify fixed selection criterion to search on the basis of previous number of days, weeks or months in which items were returned. Range Selection: Specify date range to search on the basis of items returned between two dates.

ii. After specifying the required search criteria, click on **Search**.

The screenshot shows the '3. Items with me' search interface. It has sections for 'General' (SendBy: Supervisor, Search On: Record, Mode: Requested), 'Date' (DateReceived Between: 01/03/2017 and 02/05/2017), and search buttons ('Search', 'Clear').

Figure: 7.34

iii. The search results appears as shown below.

The screenshot shows the '3. Items with me' search interface with the same search criteria as Figure 7.34. Below the search area, there is a 'Search Results' section containing a table:

Operations	Item Name	Request No.	Transfer No.	Date Received	Granted Till
<input type="checkbox"/>	Easy	AAA000015	46	2017-04-14	2017-04-24
<input type="checkbox"/>	amitesh	AAAL00012	43	2017-04-14	2017-04-14

Navigation buttons '< Prev' and 'Next>' are at the bottom right of the results table.

Figure: 7.35

5. To perform Operations on Search Results:

i. To **Generate Transfer Note**:

- Select the desired **Item Name** listed in Search Results.
- Point the mouse pointer on **Operations** link.
- Click on **Generate Transfer Note**.

Search Results				
Item Name	Request No.	Transfer No.	Date Received	Operations
<input type="checkbox"/> 840557490-Proposal Enclosures - Copy - Copy	41		2017-04-24	<input type="button" value="Return"/>
<input checked="" type="checkbox"/> Easy	AAA000015	46	2017-04-14	<input type="button" value="GenerateTransfer"/>
<input type="checkbox"/> Journey to Lahore		1	2017-04-23	
<input type="checkbox"/> LIC Policy 865840557490		42	2017-04-24	
<input type="checkbox"/> LIC Policy 867		22	2017-04-24	
<input type="checkbox"/> RMS		21	2017-04-24	
<input type="checkbox"/> amitesh	AAAL00012	43	2017-04-14	2017-04-14

Figure: 7.36

- Generate Transfer Note screen appears.

Generate Transfer Note - Internet Explorer

OMNI Docs RMS
Record Management System

Generate Transfer Note

Recipient User ...

Recipient Role ... Group ...

Item Name	Request No.	Priority
Easy	63	High

Dispatch OK

Figure: 7.37

- To learn **how to Generate Transfer Note**, refer to section **11.2.1 Generate Transfer Note of RMS 2.5 Reference Manual**.
 - For **Dispatch Details**, refer to **section 11.2.2 Dispatch Details of RMS 2.5 Reference Manual**.
 - Once the Generate Transfer Note operation of the selected item is completed, it is removed from the list of search results.
- ii. To **Return** an item:
- Select the desired **Item Name** listed in Search Results.
 - Point the mouse pointer on **Operations** link.
 - Click on **Return** to return the selected item back to the user who sent it.

Search Results					
<input type="checkbox"/> Item Name	Request No.	Transfer No.	Date Received	Operations	
<input type="checkbox"/> 840557490-Proposal Enclosures - Copy - Copy	41		2017-04-24	Generate Transfer	Return
<input type="checkbox"/> Easy	AAA000015	46	2017-04-14		
<input type="checkbox"/> Journey to Lahore		1	2017-04-23		
<input type="checkbox"/> LIC Policy 865840557490		42	2017-04-24		
<input type="checkbox"/> LIC Policy 867		22	2017-04-24		
<input type="checkbox"/> RMS		21	2017-04-24		
<input checked="" type="checkbox"/> amitesh	AAAL00012	43	2017-04-14		

Figure: 7.38

- Generate Transfer Note screen appears.

The screenshot shows a web-based application window titled "Generate Transfer Note - Internet Explorer". At the top left is the logo "OMNIDOCS RMS Record Management System". In the center, there is a button labeled "Generate Transfer Note". Below this, under the heading "Recipient User", is a dropdown menu showing "Supervisor". A table below lists the selected item: "amitesh" (Request No. 44, Priority High). At the bottom of the dialog are two buttons: "Dispatch" and "OK". The status bar at the bottom right shows "100%".

Figure: 7.39

- To learn **how to Generate Transfer Note**, refer to section **11.2.1 Generate Transfer Note of RMS 2.5 Reference Manual**.
 - For **Dispatch Details**, refer to **section 11.2.2 Dispatch Details of RMS 2.5 Reference Manual**.
 - Once the Return operation of the selected item is completed, it is removed from the list of search results.
- iii. Clicking on an **Item Name**, listed in Search Results, opens the properties screen of that item.

Working with Outgoing Request

1. Click on RMS Configuration created for **Outgoing Request**.
2. Depending on the configuration settings, the following screen appears.

Operations	Status	ReturnDate	DateRequired	Requested To	RequestedOn	Priority	RequestNo	Item Name
	Granted	2017-04-14	2017-04-14	Supervisor	2017-04-14	Medium	AAAE00005	amitesh
	Granted	2017-04-14	2017-04-14	Supervisor	2017-04-14	High	AAA00006	Document
	Granted	2017-04-27	2017-04-14	Supervisor	2017-04-14	Medium	AAA00008	Document
	Granted	2017-04-14	2017-04-14	Supervisor	2017-04-14	Medium	AAAL00012	amitesh
	Granted	2017-04-14	2017-04-14	Supervisor	2017-04-14	Medium	AAA00015	Easy

Figure: 7.40

3. Based on the search criteria configured in OmniDocs Admin module, the screen displays Search Results of the Outgoing Request.

NOTE:

Message "No results for this search criteria" appears if there is no record to match the configured search criteria. You can close the message by clicking on **Close** link.

4. To perform a new search:

- i. Specify the search criteria as tabled below. The availability of search criteria depends on how these are configured by the Admin. All the possible options are given in this table.

Type	Search Criteria	
Outgoing Request	General: Specify the general search criteria.	<ul style="list-style-type: none">• Priority: Select the desired priority from the dropdown list.• Requested Status: Select requested status of the outgoing request to search on the basis of the status of the sent request. The status can be pending, granted or rejected.• Requested To: Select the desired user to search the items on the basis of the name of the user to whom the requests have been made.
	Requested On: Specify this criterion to search outgoing request on the basis of fixed selection (in terms of fixed time period) or range selection (in terms of date range).	<ul style="list-style-type: none">• Fixed Selection: Select this option to configure search on the basis of previous number of days, weeks or months in which requests were made.• Range Selection: Specify this criterion to search on the basis of date range.
	Date Required: Specify this criterion to search on the basis of dates.	<ul style="list-style-type: none">• Fixed Selection: Specify this criterion to search on the basis of requests which were made in the previous number of days, weeks or months.• Range Selection: Specify this criterion to search outgoing requests generated between two dates.
	Return Date: Specify this criterion to search on the basis of return date.	<ul style="list-style-type: none">• Fixed Selection: Specify this criterion to search on the basis of the returned outgoing requests in the previous number of days, weeks or months.• Range Selection: Specify this criterion to search outgoing requests returned between two dates.

- ii. After specifying the required search criteria, click on **Search**.

4. Outgoing Request

General

Priority	Medium <input type="button" value="▼"/>	RequestStatus	Granted <input type="button" value="▼"/>
Request To	<input checked="" type="radio"/> User <input type="text" value="Supervisor"/> <input type="button" value="..."/>	<input type="radio"/> Role <input type="text"/> <input type="button" value="..."/>	<input type="text"/> Group <input type="button" value="..."/>

Date

Date Required Between and

Figure: 7.41

iii. The search results appears as shown below.

4. Outgoing Request

General

Priority	Medium <input type="button" value="▼"/>	RequestStatus	Granted <input type="button" value="▼"/>
Request To	<input checked="" type="radio"/> User <input type="text" value="Supervisor"/> <input type="button" value="..."/>	<input type="radio"/> Role <input type="text"/> <input type="button" value="..."/>	<input type="text"/> Group <input type="button" value="..."/>

Date

Date Required Between and

Search Results

<input type="checkbox"/>	Item Name	RequestNo	Priority	RequestedOn	Requested To	DateRequired	ReturnDate	Operations
								Status
<input type="checkbox"/>	amitesh	AAAE00005	Medium	2017-04-14	Supervisor	2017-04-14	2017-04-14	Granted
<input type="checkbox"/>	Document	AAAHH00008	Medium	2017-04-14	Supervisor	2017-04-14	2017-04-27	Granted
<input type="checkbox"/>	amitesh	AAAL00012	Medium	2017-04-14	Supervisor	2017-04-14	2017-04-14	Granted
<input type="checkbox"/>	Easy	AAA000015	Medium	2017-04-14	Supervisor	2017-04-14	2017-04-14	Granted
<input type="checkbox"/>	EE	AAAQ00017	Medium	2017-04-14	Supervisor	2017-04-14	2017-04-14	Granted
<input type="checkbox"/>	shivam1	AAAV00022	Medium	2017-04-19	Supervisor	2017-04-19	2017-04-19	Granted
<input type="checkbox"/>	shivam2	AAAV00022	Medium	2017-04-19	Supervisor	2017-04-19	2017-04-19	Granted
<input type="checkbox"/>	User1	AAAY00025	Medium	2017-04-24	Supervisor	2017-04-24	2017-04-24	Granted

Figure: 7.42

5. To perform Operations on Search Results:

i. To **ReRequest**: (available for rejected items)

- Select the desired **Item Name** listed in Search Results.
- Point the mouse pointer on **Operations** link.
- Click on **ReRequest** to re-send the request.

Search Results							
<input type="checkbox"/> Item Name	RequestNo	Priority	RequestedOn	Requested To	DateRequired	ReturnDate	Operations
<input type="checkbox"/> NG-7	AAAA00001	Medium	2017-04-13	Supervisor	2017-04-13	2017-04-13	ReRequest
<input checked="" type="checkbox"/> Journey to Lahore	AABF00032	Medium	2017-05-01	Supervisor	2017-05-01	2017-05-03	Rejected
< Prev							Next>

Figure: 7.43

- Generate Transfer Request screen appears.

Name	File Number	Availability	Current Borrower	Current Requestee
Journey		Y	RMU	0

Figure: 7.44

- To learn **how to Generate Transfer Request**, refer to section **11.2.3 Request Document / Box of RMS 2.5 Reference Manual**.
- Once the ReRequest operation of the selected item is completed, its status changes from **Rejected** to **Pending**.
- ii. To **Remind** about a request: (available for pending and rejected items)
 - Select the desired **Item Name** listed in Search Results.

- Point the mouse pointer on **Operations** link.
- Click on **Remind** to send a reminder for a selected request. Reminders can be created for the requests that have not been processed at the other end.

Search Results							
<input type="checkbox"/>	Item Name	RequestNo	Priority	RequestedOn	Requested To	DateRequired	ReturnDate
<input type="checkbox"/>	NG-7	AAAA00001	Medium	2017-04-13	Supervisor	2017-04-13	2017-04-13
<input checked="" type="checkbox"/>	Journey to Lahore	AABH00034	Medium	2017-05-02	Supervisor	2017-05-02	2017-05-03

Figure: 7.45

- Reminders screen appears.

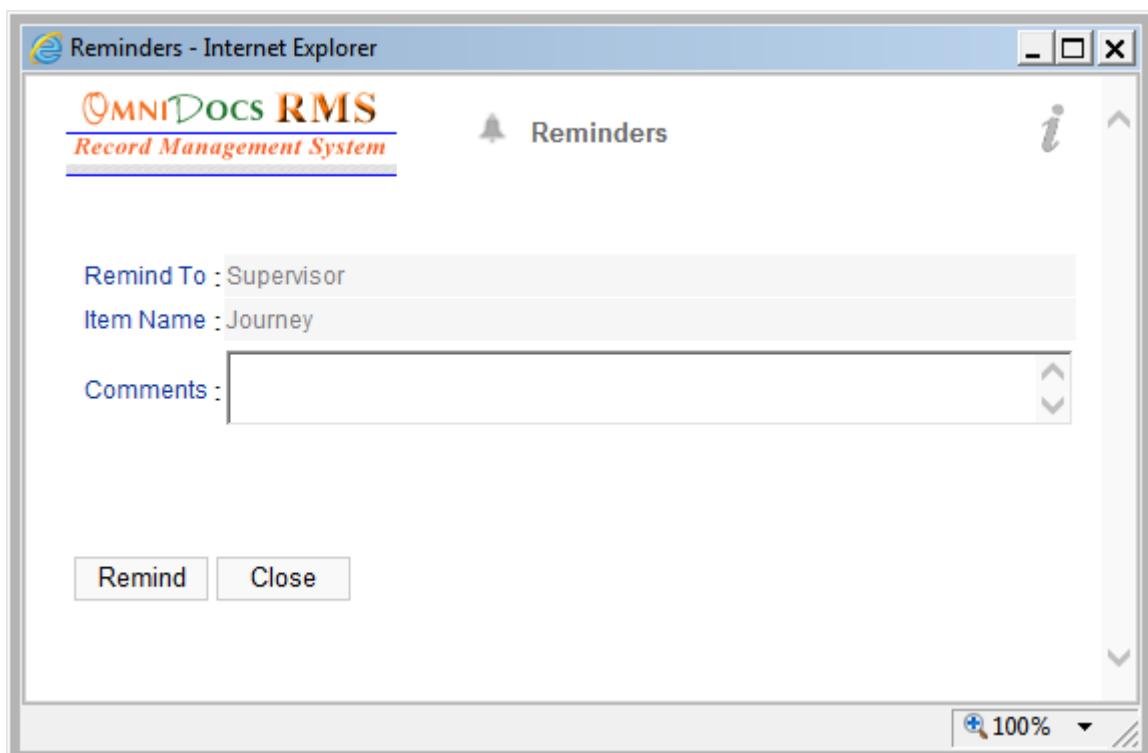


Figure: 7.46

- To learn **how to Reminders**, refer to section **11.4.1.1 Reminders of RMS 2.5 Reference Manual**.

- Clicking on an **Item Name**, listed in Search Results, opens the properties screen of that item.

Working with Items Transferred

1. Click on RMS Configuration created for **Items Transferred**.
2. Depending on the configuration settings, the following screen appears.

The screenshot shows the OmniProcess RMS interface. At the top, there are status indicators: Last Login Time 02/05/2017 15:44, Last Login Failure Time 02/05/2017 15:47, and Failure Attempt Count 1. On the right, there are links for Alarms, Options, Help, and Logout. The main area has a sidebar with categories like Repository, Search, and Reports, with 'OmniProcess' selected. The main content area is titled '5. Items Transferred'. It includes sections for General (Status dropdown), Recipient (User or Role selection), Date (Sent On Between date range), and Search (Search and Clear buttons). Below these is a 'Search Results' table with columns: Item Name, Transfer No., Request No., Sent To, Sent On, and Status. The table contains several rows of transferred items, each with a small thumbnail icon and a link to view details.

Item Name	Transfer No.	Request No.	Sent To	Sent On	Status
NG-Z	00003AAC	AAAA00001	Supervisor	2017-04-14	Pending
amitesh	00001AAA	AAAE00005	Supervisor2	2017-04-14	Received
Document	00004AAAD	AAAF00006	Supervisor2	2017-04-14	Received
Document	00006AAF	AAAHH00008	Supervisor2	2017-04-14	Received
amitesh	00008AAAH	AAAL00012	Supervisor2	2017-04-14	Received
Easy	00009AAAI	AAA000015	Supervisor2	2017-04-14	Received
EE	00010AAAJ	AAAQ00017	Supervisor2	2017-04-14	Received
test123	00011AAAK	AAAU00021	amitesh1	2017-04-17	Received

Figure: 7.47

3. Based on the search criteria configured in OmniDocs Admin module, the screen displays Search Results of the Items Transferred.

NOTE:

Message "No results for this search criteria" appears if there is no record to match the configured search criteria. You can close the message by clicking on **Close** link.

4. To perform a new search:
 - i. Specify the search criteria as tabled below. The availability of search criteria depends on how these are configured by the Admin. All the possible options are given in this table.

Type	Search Criteria	
Items Transferred	General: Specify the general search criteria.	<ul style="list-style-type: none"> Recipient: Specify the user name to search on the basis of the name of the recipients who have received the transferred items. Status: Select the desired status from the dropdown to search items on the basis of the status of the transferred items. The status can be Pending, Yet to Dispatch, Received or Rejected.
	Sent On	<ul style="list-style-type: none"> Fixed Selection: Specify this criterion to perform search on the basis of previous number of days, weeks or months in which the items were sent. Range Selection: Specify this criterion to perform search on the basis of items transferred between two dates.

ii. After specifying the required search criteria, click on **Search**.

The screenshot displays a search interface titled "5. Items Transferred". The "General" section includes a "Status" dropdown set to "Pending", a "Recipient" field with "User" selected and "Supervisor2" entered, and a "Role" field with an empty input. The "Date" section shows a date range from "01/04/2017" to "03/05/2017" with calendar icons. At the bottom are "Search" and "Clear" buttons.

Figure: 7.48

iii. The search results appears as shown below:

5. Items Transferred

General	Status	Pending												
Recipient	<input checked="" type="radio"/> User	Supervisor2												
	<input type="radio"/> Role	<input type="text"/> ... <input type="button" value="Group"/> <input type="button"/>												
Date	Sent On Between 01/04/2017 and 03/05/2017													
<input type="button" value="Search"/> <input type="button" value="Clear"/>														
Search Results <table border="1"> <thead> <tr> <th>Item Name</th> <th>Transfer No.</th> <th>Request No.</th> <th>Sent To</th> <th>Sent On</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>User1</td> <td>00021AAAU</td> <td></td> <td>Supervisor2</td> <td>2017-04-24</td> <td>Pending</td> </tr> </tbody> </table>			Item Name	Transfer No.	Request No.	Sent To	Sent On	Status	User1	00021AAAU		Supervisor2	2017-04-24	Pending
Item Name	Transfer No.	Request No.	Sent To	Sent On	Status									
User1	00021AAAU		Supervisor2	2017-04-24	Pending									
Operations < Prev Next>														

Figure: 7.49

- iv. Clicking on an **Item Name**, listed in Search Results, opens the properties screen of that item.

7.2.4 Document Expiry Notification

It displays the notifications set by the user when the documents are going to be expired.

Setting Document Expiry Reminder

User can set the expiry date, while processing the document and can set a reminder which will notify the selected user when the document is about to expire.

When the document is about to expire, the selected user gets a notification about the same. Also, a mail to the selected user is sent.

The notification screen contains following information:

- Document Name
- Parent Folder Path
- Expiry Date

OmniProcess

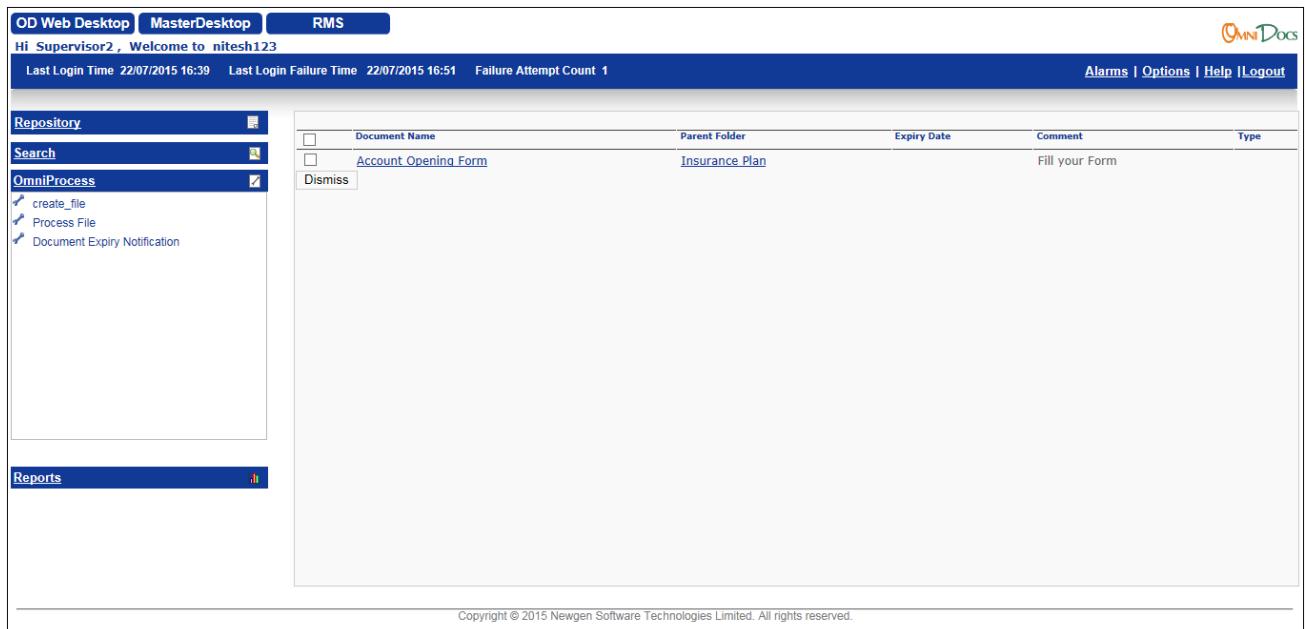


Figure: 7.50

Clicking on the Document Name launches a screen displaying that file.

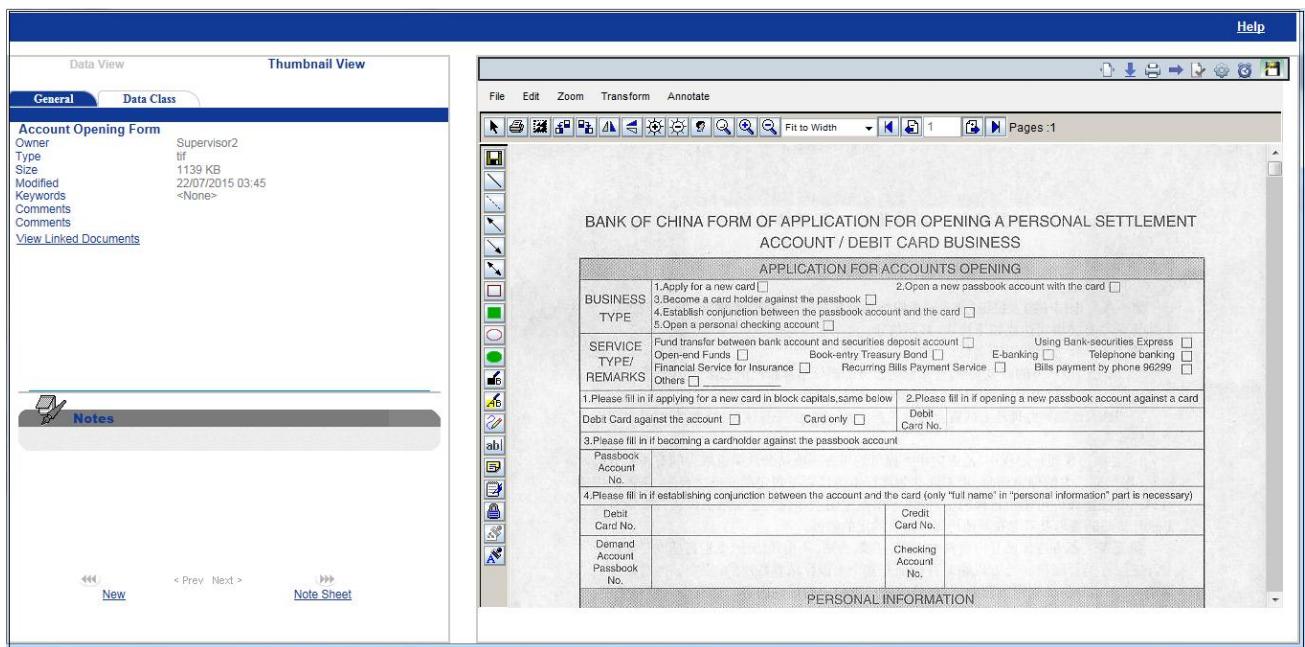


Figure: 7.51

Glossary

-A-

Action	Action refers to a particular task that has to be automated. For example, it can be a Leave Request, Purchase Request, Bill Approval, and Loan Sanction Request etc. Post Item is defined in the Administration Desktop.
Address Book	Includes the list of users and groups of the current shared cabinet.
Attachments	Documents are referred as attachments. You can send the documents as attachments through the Mail.
Annotation Bar	Displays the available annotations.
Annotation	Annotations applied on the document can be clubbed together as a group. Annotation group is created to perform the functions on the annotations collectively.
AppletViewer	AppletViewer is an application that can display documents of different types AppletViewer can be used both as a stand-alone application as well as an automation server. The image-documents can be viewed in the AppletViewer.

-B-

Batch Size	Batch Size implies a user-specified number for displaying documents, sub folders, keywords, or index values in a batch. The batch size can be specified in the ' <i>BatchSize.ini</i> ' file present in the application path.
-------------------	---

-C-

Comments	Displays the comments associated with folders and documents
Connect to a Cabinet	Establishes the connection to the registered cabinet
Copy	Copies a selected document into one or multiple folders simultaneously.
Content View	Displays the document. There are various ways to customize the content view like fit to page, fit to height and fit to width.

-D-

Data Class	The user-defined information associated with the documents or folders. It contains fields or indexes.
Disconnecting Cabinet	Disconnects the user from a cabinet already connected to.
Document	An image or non-image file that is stored in the folders of the OmniDocs Web cabinets.
Duplicate	Creates a copy of a document and data associated with it to a new document in same folder.

-E-

Empty Trash	Permanently deletes documents and folders lying in the Trash folder.
--------------------	--

-F-

Folder	Repository for storing the documents under them. The user can create the folders under a cabinet or other folder.
Fit to Width	Fit to width option enables viewing the entire document without the horizontal scrollbar. The document image will adjust within the width of

Glossary

the window.

Fit to Page

Fit to page option enables you to see the entire page layout of the document. It is helpful to see the preview before taking a printout of any document.

Fit to Height

Fit to height option enables to adjust the document within the height of the window.

Free Zoom

Free Zoom option enables you to increase or decrease the zoom level of the entire document. This option is useful to view the overall page layout.

-G-

Global Index

Global indexes are user-defined fields that can be associated with any document. They facilitate in search of documents across the cabinet.

Group

The users are clubbed together as a Group.

-I-

Image

A duplicate representation of a paper-based document stored as TIF file. Other image file formats are GIF, JPG, PCX, DCX etc.

Inbox

A system-defined folder in the Shared cabinet that stores all the incoming posted documents.

-K-

Keyword

Pointers associated with the documents for later reference, and for search purpose.

-L-

Linked

Linking related documents together, which helps in quick referencing.

-M-

Glossary

Move Moves a document in any other specified folder.

-N-

Non-Image Documents	Generally, word-processed documents, presentations, spread sheets etc. These may be Windows™ based application documents.
Notification	Sends an immediate or deferred notice to any user.
Notes Sheet	Notes Sheet is a feature, which is provided in the View Menu of AppletViewer. Notes Sheet displays all the notes attached to a document by any user.

-O-

Objects	Cabinet, folder, document, user, and group are referred as object in the OmniDocs Web.
OpAll Viewer	A highly advanced, lightweight HTML5 viewer, which like a document viewer provides the functionality of viewing document images of various industry standard formats in different view modes. The HTML5 Viewer allows viewing and editing of plain as well as annotated images in file formats, viz. TIFF, BMP, GIF, JPEG and HTML documents.

-P-

Page	A single image forming part of a document
Password	A keyword used for identification in the login session of Newgen OmniDocs Web.
Preferences	Enables the user to set specific parameters for customizing the view in the Document Viewer. It is mainly for MS Word, MS Excel, MS Power Point and Adobe Acrobat Reader and is applicable for Internet Explorer 5.0 or higher.
Point Zoom	Point Zoom option enables you to magnify the

Glossary

specified area of a document. You can point at a specified area of a document and magnify the selected portion. This option is useful to view the minute details of documents

-R-

Rights

There are five kinds of rights that can be assigned for any object- READ, WRITE, MODIFY, ANNOTATE and DELETE.

-T-

Trash

A system-defined folder in which deleted documents/folders are lying.

-U-

User

To access the shared cabinets, you should be a user of that cabinet. These users can access the cabinet depending upon the rights assigned to them.

-V-

Versions

Saving the document revisions as a separate version of the document. There is an option to view various versions of a document.

-Z-

Zoom

Enlarges or reduces the viewable size of a document as a percentage of its normal size.