



Samhita Users Guide



Samhita Users Guide

Contributors: DBSentry Corp. Product Development

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Chapter 1: Preface

1.1 Introduction

Samhita[®] Enterprise Document Management software offers an organization wide platform for capturing, creating, managing, retrieving and archiving large volumes of documents.

Samhita[®] incorporates best practices to redefine the transition from an office based on paper documents to an office based on electronic documents. Samhita[®] not only helps organizations manage the increasing volumes of paper documents; it also provides a platform to organize and monitor unstructured data.

An integral part of the DBSentry Corp's product suite, Samhita Enterprise Document Management offers a wide range of functionalities, which help organizations reduce misfiling, document retrieval time and costly photocopying and paper distribution – all processes that impede information access.

The electronic document management features in Samhita are essential functionality for the organization and maintenance of files and documents. The web based document management software from DBSentry Corp. brings a number of benefits to end users working or managing documents throughout the document life cycle.

Benefits of Samhita includes:

Secured Document Access

Samhita[®] incorporates industry standard security features that allows secure control and authorization of users as they access documents. Samhita[®] security features provides a tight control of who can access what folders, documents and information and the degree of access they can have (read, add, edit, delete and Admin). It also provides advance security to a granular level by providing encryption on documents, which gives option to access Folders, but restrict access to documents within the Folders.

User Access Audit Report

Samhita[®] incorporates an essential requirement for regulatory compliance – of who added or read the document / record or when it was deleted from the repository. It also tracks the movement of the documents through a document life cycle with proof of access and changes at every stage of the process and the cycle.

Document Version Control

Samhita® provide an easy to use Check in/ Check out facility that prevents documents from being overwritten or deleted as documents are updated. Document can be easily rolled back to their previous versions as and when required. All the versions are maintained and can be viewed from within the browser. Each document version allows user to track the timing of when the versions were added and who added them.

Document Watch

Users can subscribe to documents or folders using this feature. This allows users or a user group to be notified of changes or addition of documents in Samhita®. Users can manage all the document subscription of watch from a central list.

Retrieve critical documents faster

Samhita® provides advanced document search and retrieval features to ensure that users are more productive than before as the search time reduces drastically. There are multiple search options provided by Samhita® to make sure, User get the information they are looking for how they want it whenever they want it.

Centralized Storage

Samhita® provides a centralized repository to streamline the management of mission critical documents maintaining current and effective versions of business documents.

In this chapter we shall look into the following topics:

- Starting Samhita

- Login

- Elements on User's Home page

- Logout

1.2 Starting Samhita:

You can use any web browser (Internet Explorer, Firefox) to access Samhita Document Management System. Launch a web browser of your choice and point to the Samhita URL (Ask your system administrator for the URL). You will be presented with the Samhita login screen.

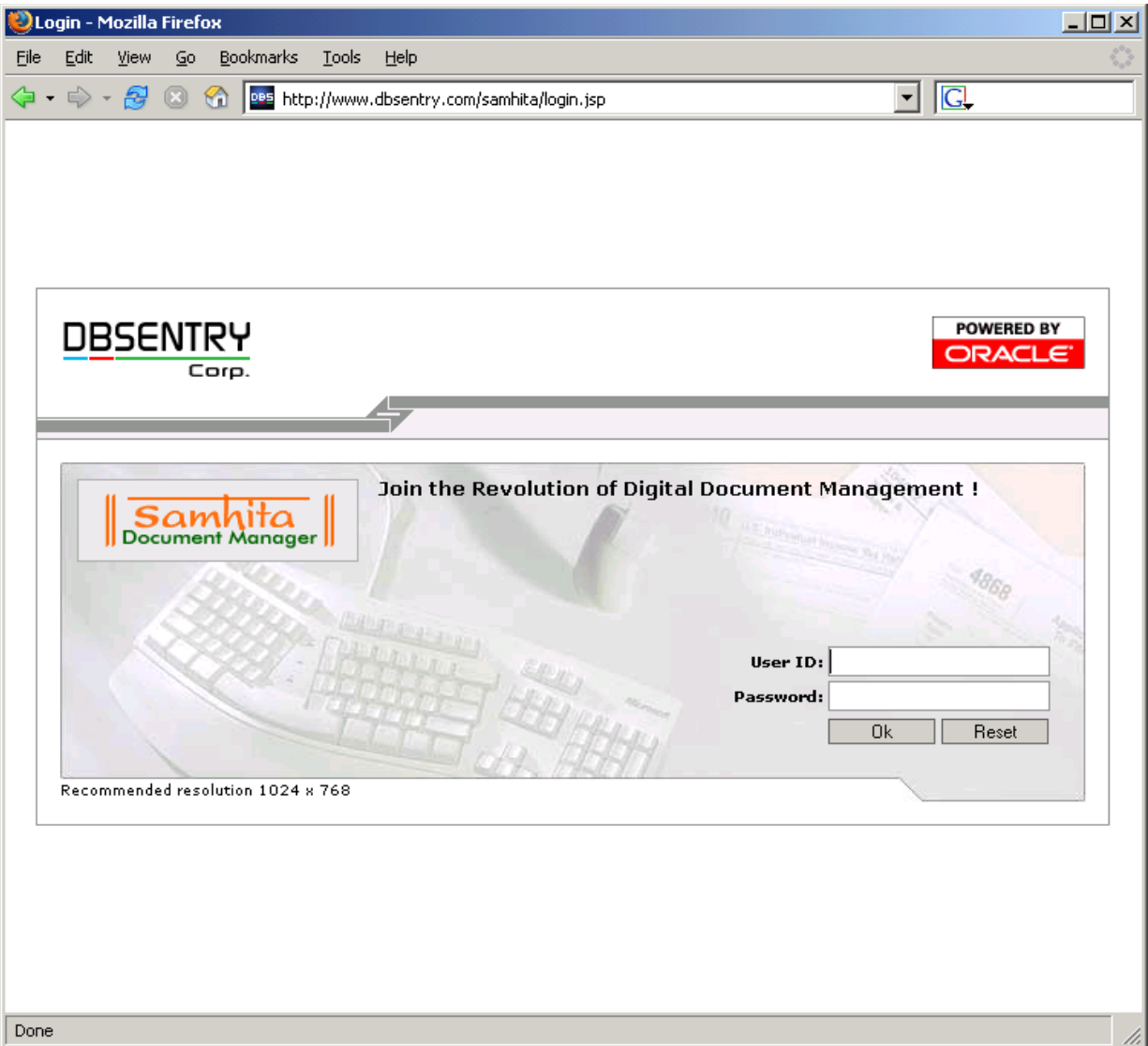


Illustration 1: Samhita Login Screen

1.3 Login:

- Launch Smahita URL using your favorite web browser
- Enter your userid and password
- Click on “OK” button

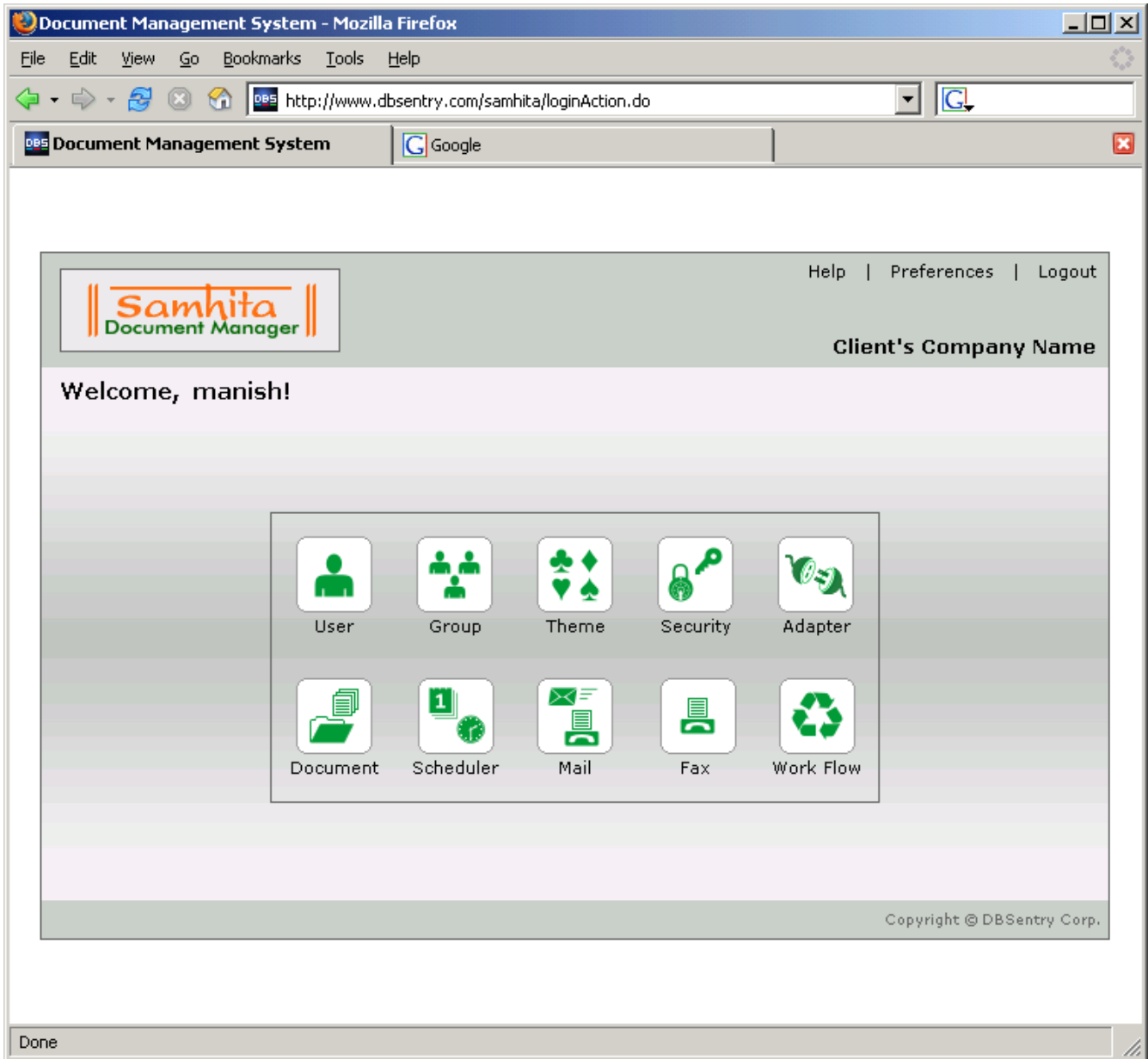












Illustration 2: Samhita User Home Page

1.4 Elements on User Home Page:

The following table describe various elements on Samhita User Home Page.

<i>Screen Element</i>	<i>Description</i>
Help	Link to context sensitive help. This element is present on every screen.
Preferences	Link to user preferences window. This element is present on every screen.
Logout	Logout Link. This element is present on every screen.

<i>Screen Element</i>	<i>Description</i>
 user	Link to User administration page
 group	Link to Group administration page
 themes	Link to a page where custom theme can be defined.
 security	Link to document/user security page
 adapter	Link to adapter page that integrates samhita with your other information systems (For e.g. Peoplesoft Financials).
 documents	Link to document management page.
 scheduler	Link to scheduler page where you can monitor status of your email/fax jobs.
 email	Link to email page where you can email documents
 fax	Link to fax page where you can fax documents
 Workflow	Link to workflow page.

1.5: Logout

- Click on the “Logout” link on the top right of the page to logout of the Samhita app.

Chapter 2: Document Management

In this chapter we shall look into the following topics:

Introduction

Elements on Toolbar

How to use address bar

How to use navigation panel

How to use folder/document list

How to Search

How to create a new document

How to create a new folder

How to rename a folder/document

How to upload a document

How to download a document

How to apply an ACL to a document/folder

How to create a permanent/transient link to a document

How to view document/access log

How to activate a watch feature on a document

How to view a document as HTML document

How to Cut/Copy/Paste a document/folder

How to delete a document/folder

How to copy a document/folder to a new location

How to move a document/folder to a new location


How to make a document versionable

How to check-out a document

How to check-in a document

How to undo a checkout on a document
How to view version history of a document
How to encrypt a document
How to decrypt a document
How to zip a document/folder
How to unzip a document/folder
How to email a document
How to fax a document
How to submit a document/folder to a workflow

2.1 Introduction:

To access Document Management explorer, while Logging in, select Document icon  to view the folders/documents listing for the logged-in user, and the shared document for that user.

Document/Folder page consists of following parts.

- **Tool-bar** consists of icons which assists you to perform various operations on Folder/Document List.
- **Menu-bar** consists of drop down lists which assists you to various operations on Folder/Document Lists.
- **Address-bar** assists you to navigate through the folders by directly entering the path of the folder separated by '/'.
- **Navigation Panel** consists of Tree view which lists the folders. You can navigate through the folders by selecting the folders icon.
- **Folder/Document List Panel** consists of listing of folder and documents.
- **Search Panel** consists of various search criteria's. You can search for the documents.
- **Status-bar consists of two parts**
 - **Message-bar:** displays the message of the operations performed on the Folder/Document List.
 - **Navigation-bar:** helps in navigating through the result when the total items are more than the displayed items

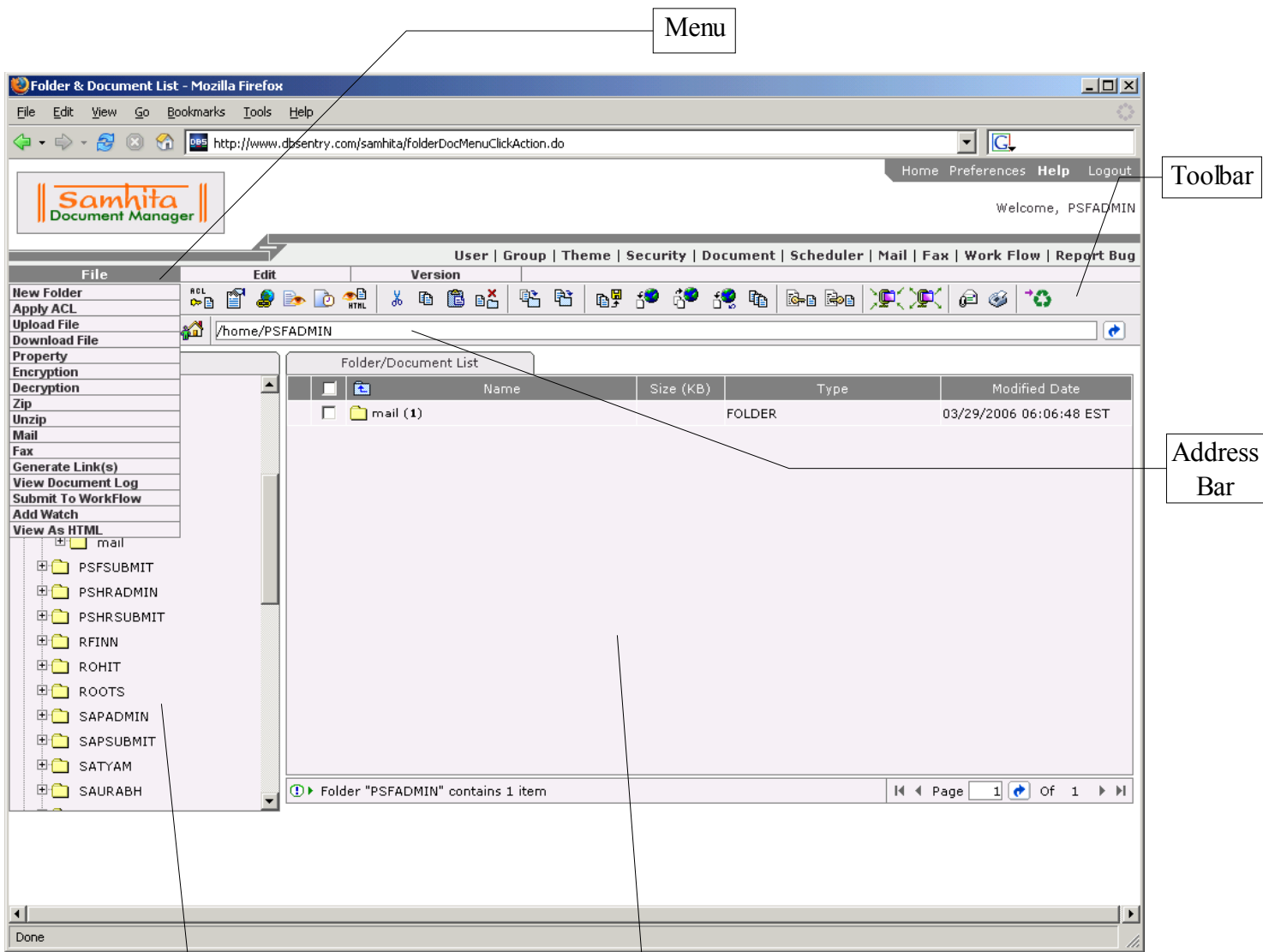







Illustration 3: Document Management Explorer































Navigation Panel

Folder/Document List Panel

2.2 Elements on Toolbar:

The following table describes various elements on the toolbar

<i>Element</i>	<i>Description</i>
	New Document
	New Folder
	Change name of folder/document
	Upload a file
	Download a file

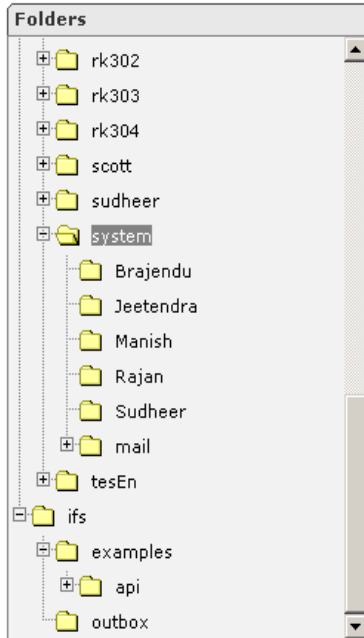
<i>Element</i>	<i>Description</i>
	Apply ACL to document or folder
	View file or folder property
	Generate a permanent or a transient link to a document or a folder
	View document log
	Add a watch on a document
	View a document as an HTML document
	Cut
	Copy
	Paste
	Delete
	Copy to
	Move to
	Make a document versionable
	Check-Out
	Check-in
	Undo check-out
	View version history
	Encrypt
	Decrypt
	Zip
	Unzip
	Email a document
	Fax a document
	Submit a document or folder to a workflow.
	Back
	Forward
	Go a level on top from the current level
	Search
	Refresh
	Go to user home

2.3 How to use Address Bar:



- Enter the path where you would like to navigate.
- Press 'Go' icon to go to display the record of the entered path.
- Folder/Document will be displayed corresponding to the path entered.

2.4 How to use Navigation Panel:







- '/' indicates root folder.
- '-' indicates expanded state of the folder. Clicking on it will hide the sub folders.
- '+' indicates collapsed state of the folder. Clicking on it will display the sub folders.
- Clicking on the folder will display the contents of the folder in the Folder/Document List on the right-hand side.
- Open Folder indicates that the contents of the folder are displayed in the Folder/Document List and vice-versa.

2.5 How to use Folder/Document List:


Folder/Document List				
<input type="checkbox"/>	Name	Size (KB)	Type	Modified Date
<input type="checkbox"/>	 Brajendu		FOLDER	07/03/2004 11:56:24 IST
<input type="checkbox"/>	 Jeetendra		FOLDER	07/03/2004 11:57:14 IST
<input type="checkbox"/>	 mail		FOLDER	05/24/2004 14:09:35 IST
<input type="checkbox"/>	 Manish		FOLDER	07/03/2004 11:57:36 IST
<input type="checkbox"/>	 Rajan		FOLDER	07/03/2004 11:56:57 IST
<input type="checkbox"/>	 Sudheer		FOLDER	07/03/2004 11:57:27 IST
<input type="checkbox"/>	 aaaa	758.3	application/octet-stream	07/02/2004 17:49:51 IST
<input type="checkbox"/>	 AccessControlList.doc	24.5	application/msword	05/18/2004 13:04:52 IST
<input type="checkbox"/>	 data	24.63	application/octet-stream	07/03/2004 11:56:11 IST
<input type="checkbox"/>	 solutions1.zip	2.87	application/zip	07/01/2004 17:09:32 IST
<input type="checkbox"/>	 trim.txt	0.85	text/plain	07/01/2004 16:23:58 IST
<input type="checkbox"/>	 unison.log	4.47	application/octet-stream	07/01/2004 16:22:45 IST
<input type="checkbox"/>	 Untitled1.pdf	3.66	application/pdf	07/02/2004 18:43:44 IST


 New Folder Created Page 1 Of 1

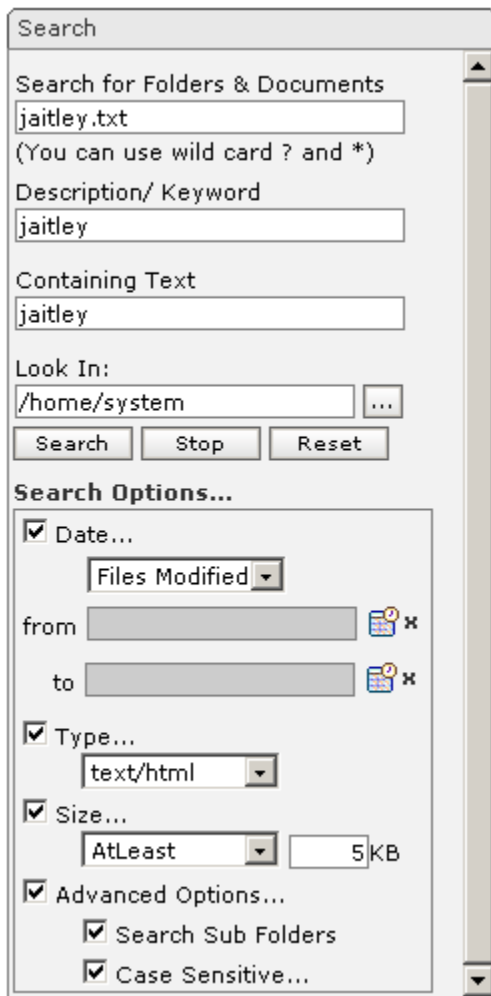
*Above displayed icons are:

- Folder []
- Document []
- Checked-Out Document []
- Versioned Document []
- To see the content of the folder click on the text of the corresponding icon.
- To view the document click on the text of the corresponding icon.
- To view the folder above the displayed folder click up icon.
- You can navigate through the Folder/Document List using the Previous, Next, Up icons, it view the corresponding pages.

2.6 How to Search a folder/document


Click on Search [] to bring up the search screen

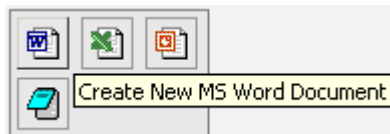
- **Search for Folders & Documents :** Enter the name of the folder/document to be searched
- **Description/Keyword:** Enter the description/keyword of folder/document to be searched.
- **Containing Text:** Enter the containing text of the document to be searched.
- **Look In:** Enter the path where the search has to be performed
-  Select the path where search has to be performed using look-up next to the Look In text.



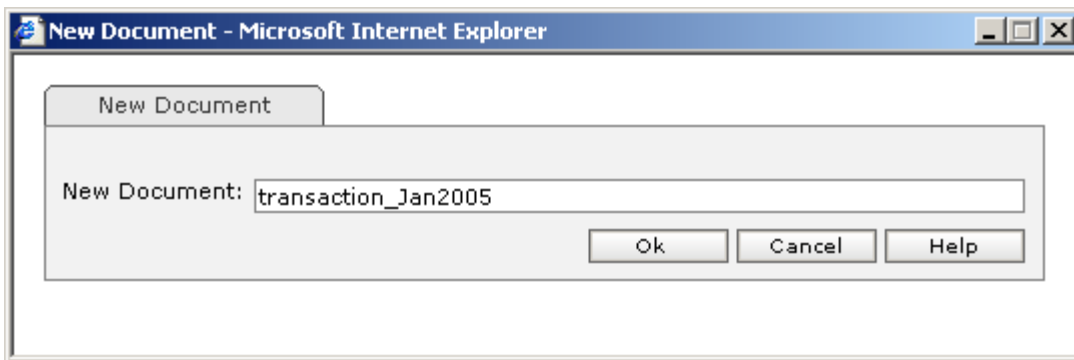
- **Search:** Press 'Search' to perform the search based on the criteria entered.
- **Stop:** Press 'Stop' to stop the search.
- **Reset:** Press 'Reset' to reset entries to enable another search.
- **Date:** Check this option to search folder/document based on date entered in From or/and To Date. You can select date using look-up next to the 'from/to Textbox'.
- **Type:** Check this option to specify the type of document to be searched like doc.
 - **Size:** Check this option to search folder/document based on the size.
 - **Advanced Options:** Check this option to search folder/ document using either "Search Sub Folders" or "Case Sensitive" search or both.

2.7 How to create a new document

- Please note that this functionality is accessible only through Microsoft Internet Explorer.
- In Folder/Document List click the folder where you would like to create new document.
- Click on the 'Create New Document' icon []
- It is possible to create a new MSWord document, a new MExcel document, a new MSPowerPoint presentation or a new Text document (Refer the figure below in clockwise sense).
- Click on the document type icon shown below to start the procedure.



- The user will be prompted with the new document window shown below.




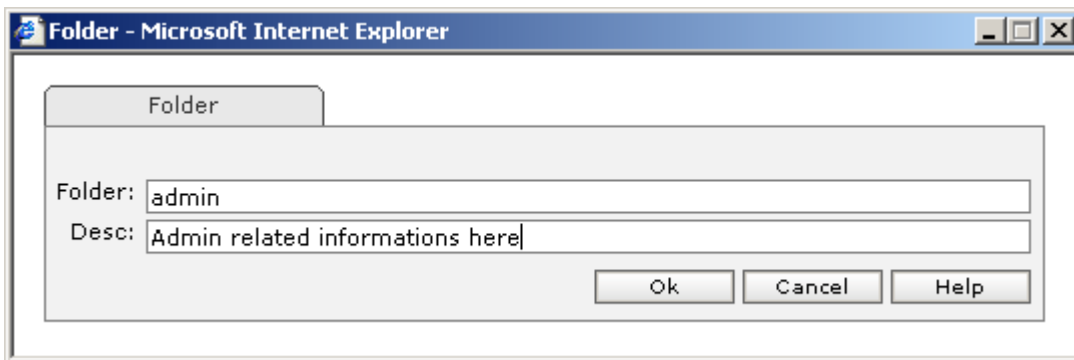
- Enter the name of the document.
- Press 'Ok' to create new document.
- Enter your network id and password when prompted to do so.
- The application corresponding to the selected document type will be initiated.
- The user can then proceed to create his/her document and save it.
- Press 'Cancel' to abort creating new document.

Not able to create new document?

- Insufficient rights to create new document in the selected location.
- Try creating new document in your Home Folder.
- Or Contact system Administrator.

2.8 How to create a new folder

- In Folder/Document List click the folder where you would like to create new folder.
- Click on the 'New Folder' icon [] or select from menu File->New Folder.




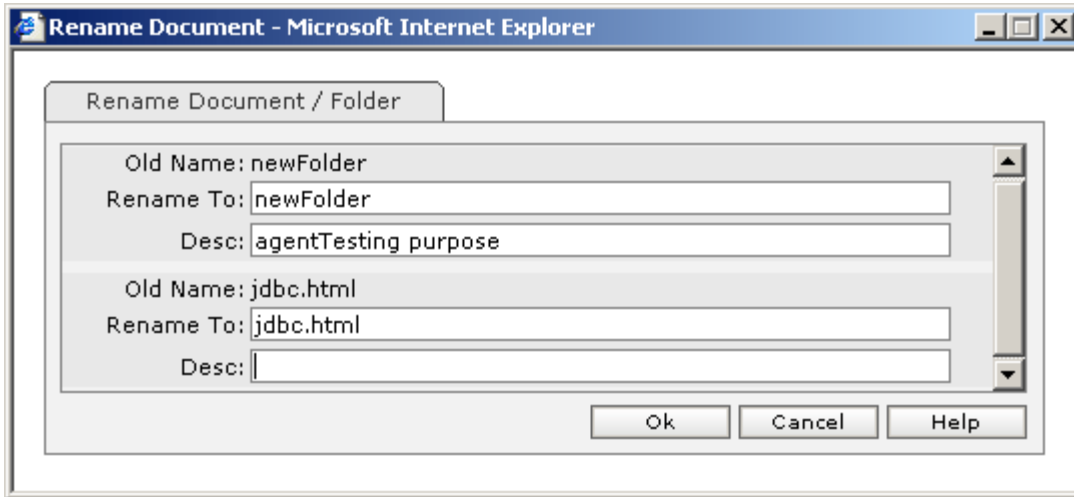
- Enter the name of the folder.
- Enter the description of the folder(optional)
- Press 'Ok' to create new folder.
- Press 'Cancel' to abort creating new folder.

Not able to create New Folder

- Insufficient rights to create New Folder in the selected location.
- Try creating New Folder in your Home Folder.
- Or Contact system Administrator.


2.9 How to rename a folder/document

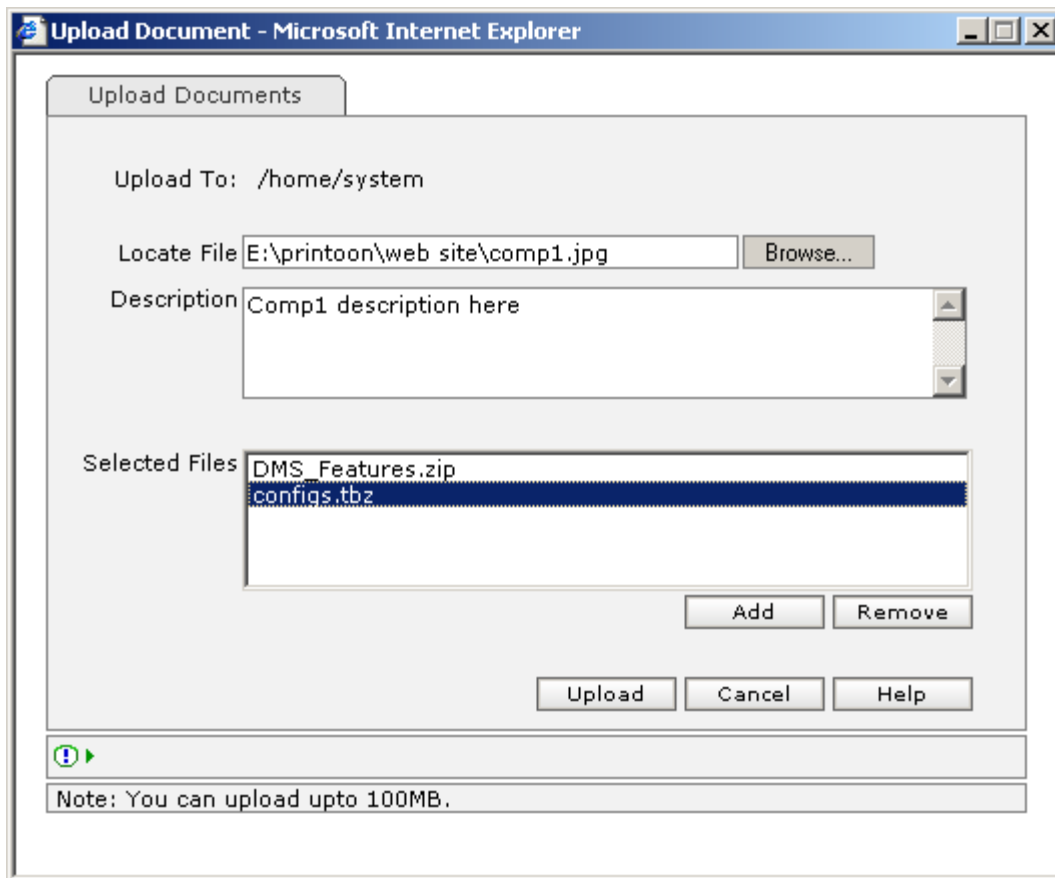
- From the Folder/Document List select the folder/document to be renamed.
- You can select multiple folders/documents.
- Click on the 'Rename' icon [] or select from menu Edit->Rename.



- Old name, Current name(Rename To), Description are displayed for each selection.
- Enter the name to which you would like to rename.
- Enter new description for the same(optional).By default, the original description is displayed(if any).
- Press 'Ok' to bring into effect the names and descriptions you have changed.
- Press 'Cancel' to abort renaming.


2.10 How to upload a document

- In Folder/Document List click the folder where you would like to upload new file.
- Click on the upload icon [] or select from menu File->Upload File.



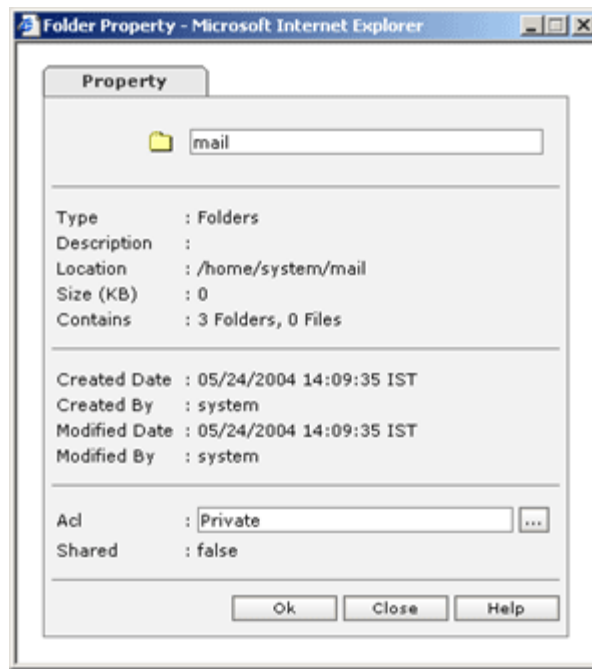
- Press 'Browse' to select the file to be uploaded from your system.
- Select the file to be uploaded.
- Enter the description. (optional)
- Press 'Add' to add the file in file-list .
- Press 'Remove' to remove selected file(s) from file-list.
- Press 'Upload' to upload file(s) from file-list.
- Press 'Cancel' to abort uploading.

2.11 How to download a document

- From the document list select documents you want to download
- Click on download icon [] to download the files

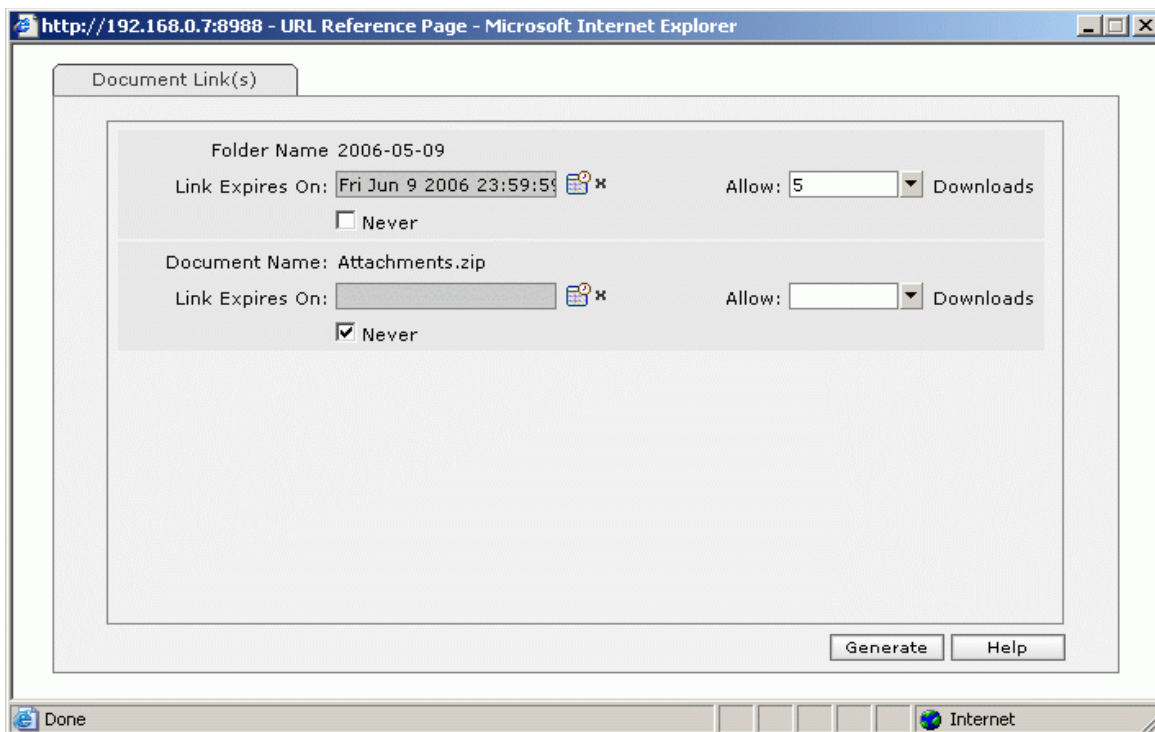
2.12 How to apply an ACL to a document/folder


- In Folder/Document List select the folder/document on which you would like to apply ACL.
- You can select multiple folder/document.

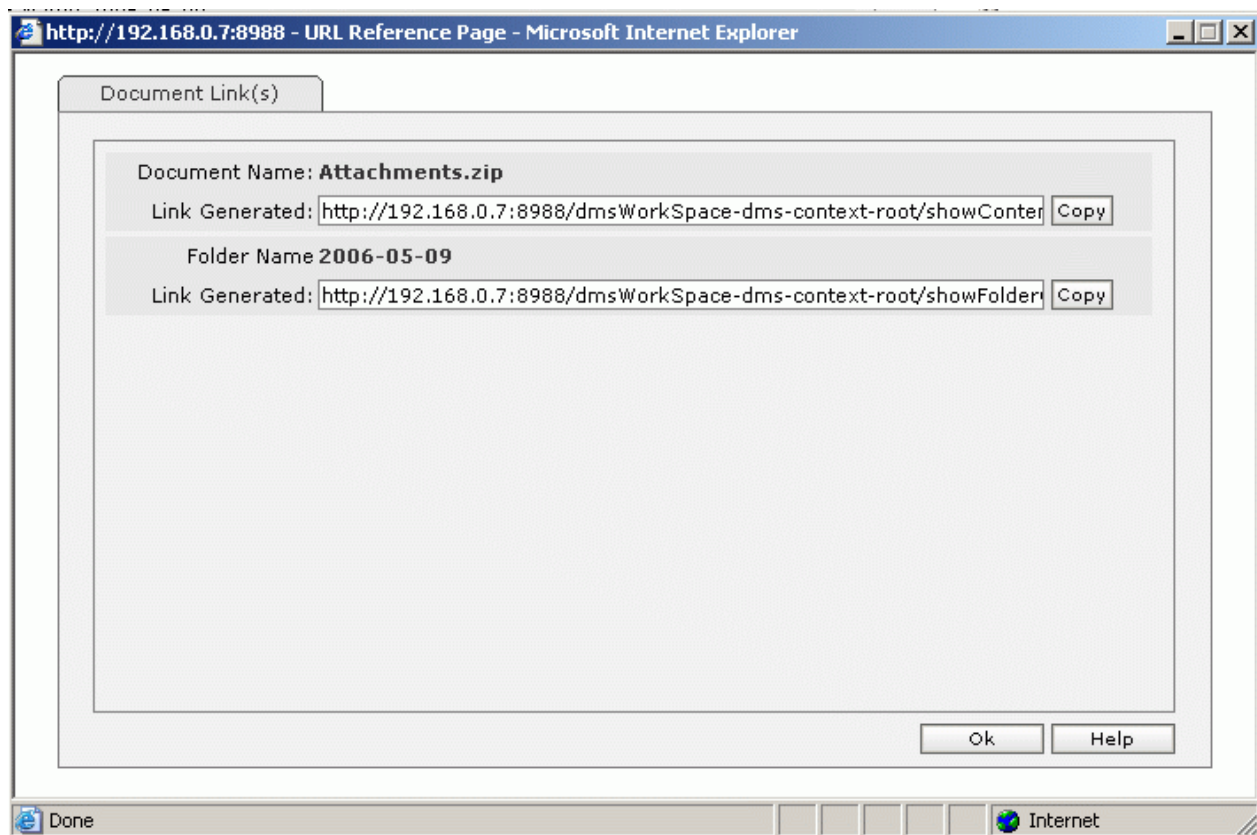


- You can rename the folder/document or apply another ACL to it.
- Press 'OK' to save the changes made.
- Press 'Cancel' to abort 'Rename' or applying 'ACL'.

2.13 How to create a permanent/transient link to a document




- From the Folder/Document List select the items for whom links are to be generated.
- Click on the generate link(s) icon [] or select from menu: File ->Generate Link(s).For every item selected, there are 3 options,which are explained below .
- **Link Expires On:** Select the date on which this item's link will be rendered ineffective in displaying it's contents.(It is assumed that the link will then expire at 23:59:59 on the selected date.)
- **Allow [] Downloads:** An editable dropdown that will enable you to set the number of times the link would work. After which the link would expire..
- **Never:** .Select this so that the link generated for this item will never expire.
- After specifying the desired options for each selected item, press "Generate" button so that the respective links are generated.

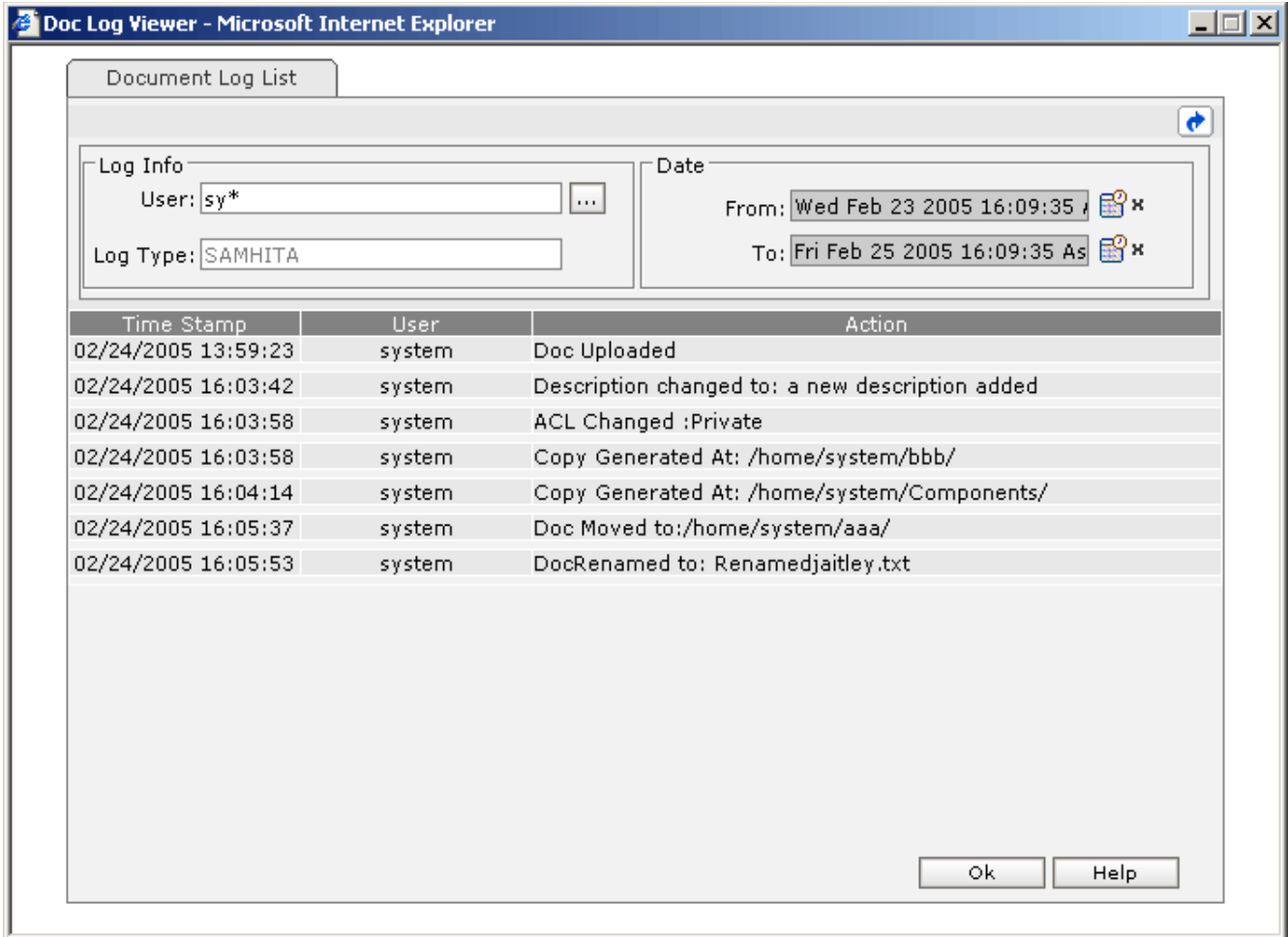


- Respective Item Name (Folder Name or Document Name) and Link Generated are displayed.
- A link for a document would display the it's content whereas, a link for a folder would display a list of immediate documents in it enabling the user to download them one by one.
- A copy button next to each document link facilitates copying corresponding link to clipboard (available in Internet Explorer only).
- Users can then paste the copied link on the browser addressbar to view contents.
- Users can forward these links to recipients who can then access the respective items.

- The user himself can click on the document names to ensure that links are generated correctly.
- Press "Ok" to close widow.


2.14 How to view document/access log

- In Folder/Document List select the document whose log you wish to view.
- Click on the View Document Log icon [] or select from menu File->View Document Log.




- The page displays a list of activities that were carried out on the document till date.
- Each entry format is of the type "TimeStamp , User , Action".
- You can also apply search criteria on the log list .
- The search can be performed based upon "User" and/or "Date".
- Search patterns for "User" can be one of the following forms: *sam,sam*,*sam*,samhita.
- Depending upon the search criteria entered, appropriate log list is displayed.

2.15 How to activate a watch feature on a document

- Add Watch helps users keep track of their documents.
- Any operation performed on the document will be notified to the users who have applied watch to it.
- The notifications will be in the form of emails to the users,so it is mandatory that the users have their email id set in samhita.
- If the email id is not set,the user will not be able to add watch to documents and will need to contact his system administrator to set his email id.
- In Folder/Document List select the documents for whom watch is to be applied.
- Click on the add watch icon [] or select from menu: File ->Add Watch.
- If watch operation is successful, a message "Watch Added Successfully to selected items" will be displayed below in the statusbar.
- In case of any error appropriate error message will be displayed in the statusbar.
- Please note that multiple users can add watch to a single document, but a single user cannot add watch to a document more than once.

2.16 How to view a document as HTML document

- This functionality aims at the provision of viewing common document types in your browser itself without any support of an external plugins.
- Text contents of Office documents,XML,PDFs can be satisfactorily viewed in the browser.
- For any document type whose text content cannot be displayed, a message "Operation not supported the requested file type ." is displayed instead.
- In Folder/Document List select the document whose content is to be viewed .
- Click on the view as html icon [] or select from menu: File ->View As HTML.

2.17 How to Cut/Copy/Paste a document/folder

How to Cut Folder/Document?

- In Folder/Document List select the folder/document you would like to cut.
- You can select multiple folder/document.
- Click on the 'Cut' icon or select from menu Edit>Cut.
- Successful cut will give the message as 'Cut Action performed successfully' in the Folder/Document List Task bar.

How to Copy Folder/Document?

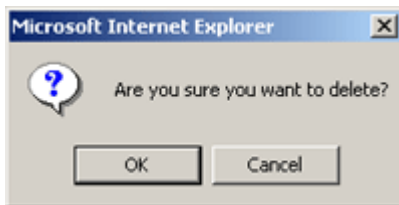
- In Folder/Document List select the folder/document you would like to copy.
- You can select multiple folder/document.
- Click on the 'Copy' icon or select from menu Edit>Copy.

- Successful copy will give the message as ' Copy action performed successfully' in the Folder/Document List Task bar.

How to Paste Folder/Document?

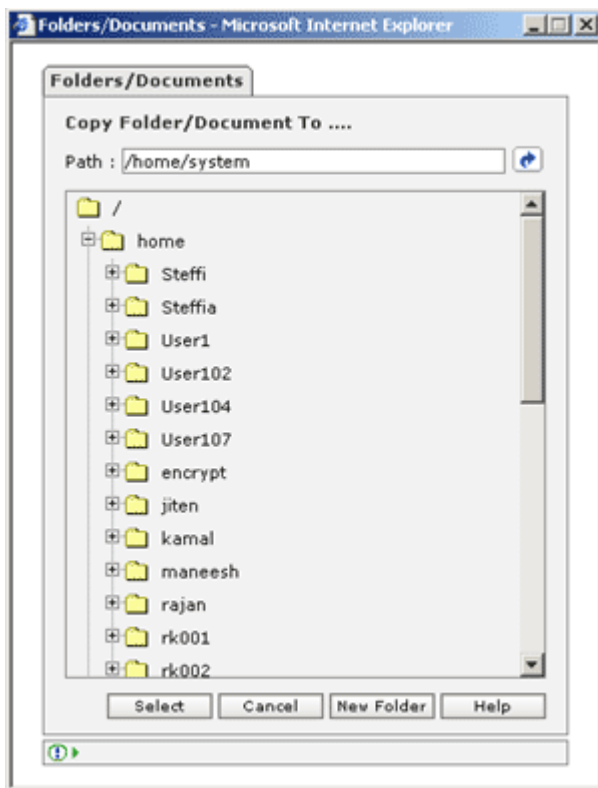
- In Folder/Document List select the folder where you would like to paste.
- Click on the 'Paste' icon or select from menu Edit>Paste.
- Successful Paste will give the message as 'The selected items were pasted successfully' in the Folder/Document List Task bar.


2.18 How to delete a document/folder



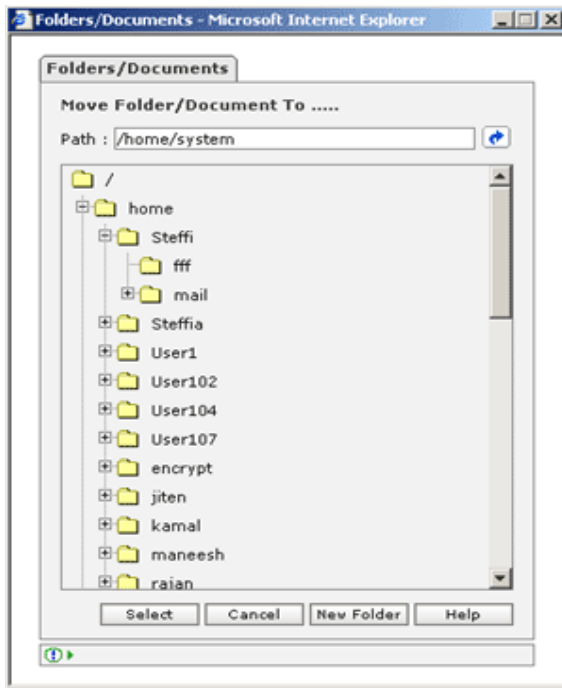
- In Folder/Document List select the folder/document you would like to delete.
- You can select multiple folders/documents.
- Click on the 'Delete' icon or select from menu Edit>Delete.
- Successful delete will give the message as 'The selected items were deleted successfully' in the Folder/Document List Task bar.


2.19 How to copy a document/folder to a new location





- In Folder/Document List select the folder/document you would like to copy.
- You can select multiple folder/document.
- Click on the 'Copy To' icon [] or select from menu Edit->Copy To Folder.
- Select the folder where you would like to Copy the selected items.
- Press 'Select' to copy the selected items to the selected Folder.
- Press 'Cancel' to abort copying.
- Press 'New Folder' to create New Folder.

2.20 How to move a document/folder to a new location




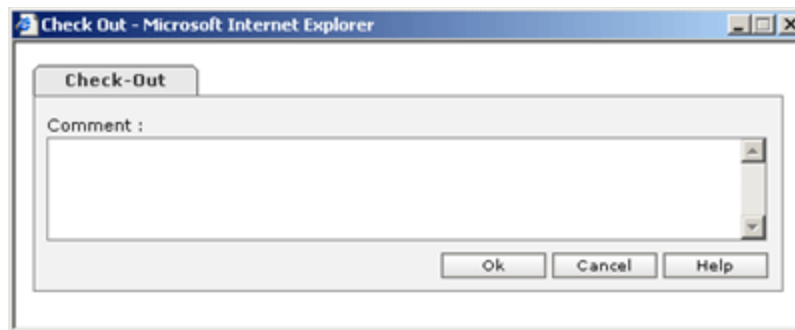
- In Folder/Document List select the folder/document you would like to move.
- You can select multiple folder/document.
- Click on the 'Move To' icon [] or select from menu Edit->Copy To Folder.
- Select the folder where you would like to Copy the selected items.
- Press 'Select' to copy the selected items to the selected Folder.
- Successful copying to the selected folder will give message as 'The selected items were copied successfully'.
- Press 'Cancel' to abort copying.
- Press 'New Folder' to create New Folder.


2.21 How to make a document versionable

- In Folder/Document List select the document you would like to make versioned.
- Click on the 'Make Versionable' icon [] or select from menu Version->Make Versionable.
- Successful making document versionable will give the message as 'The selected document is versionable' in the Folder/Document List Task bar.
- The icon will get changed to the versioned document icon [].
- You can also select the folder and make the containing documents versionable.


2.22 How to check-out a document

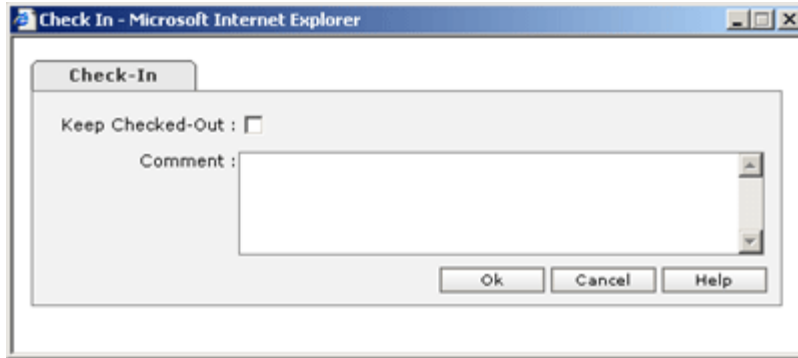
- In Folder/Document List select the document you would like to CheckOut.
- Click on the 'CheckOut' icon [] or select from menu Version->CheckOut.



- Successful CheckOut will give the message as 'Checked out operation was performed successfully' in the Folder/Document List Task bar.
- The icon will get changed to the CheckOut document icon [].
- You can also select the folder and Checkout the containing documents.


2.23 How to check-in a document

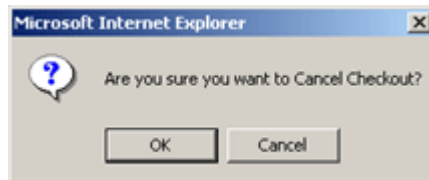
- In Folder/Document List select the CheckedOut document you would like to CheckIn.
- Click on the 'CheckIn' icon [] or select from menu Version>CheckIn.



- Successful CheckIn will give the message as 'Checked in operation was performed successfully' in the Folder/Document List Task bar.
- The icon will get changed to the CheckIn document icon.
- You can also select the folder and CheckIn the containing documents.


2.24 How to undo a checkout on a document

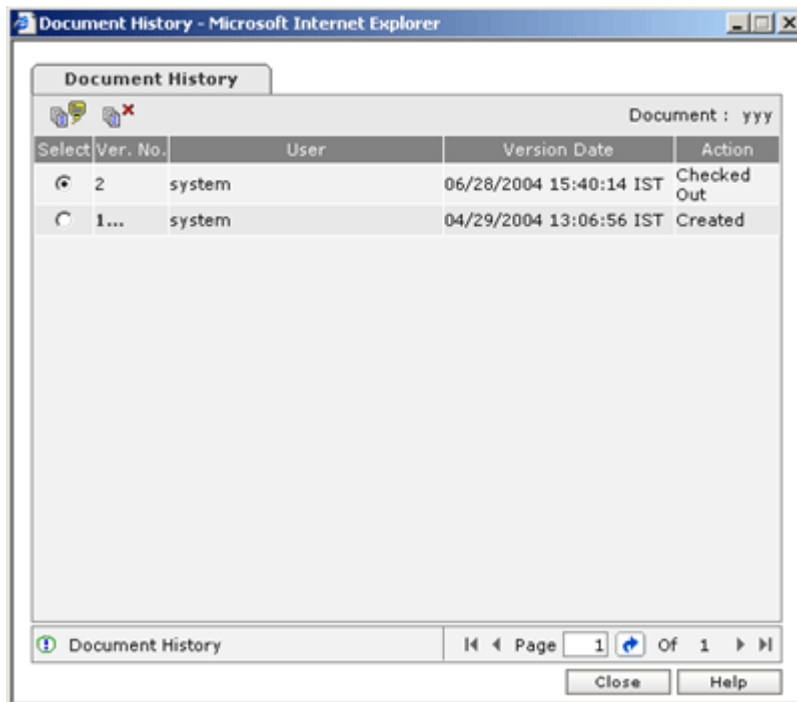
- In Folder/Document List select the checkedout document you would like to undo CheckOut.
- Click on the 'Undo CheckOut' icon [] or select from menu Version->Undo CheckOut.




- Successful Cancel CheckOut will give the message as 'Cancel Checked out operation was performed successfully' in the Folder/Document List Task bar.
- The icon will get changed to the versioned document icon.
- You can also select the folder and Cancel CheckOut the containing documents.


2.25 How to view version history of a document

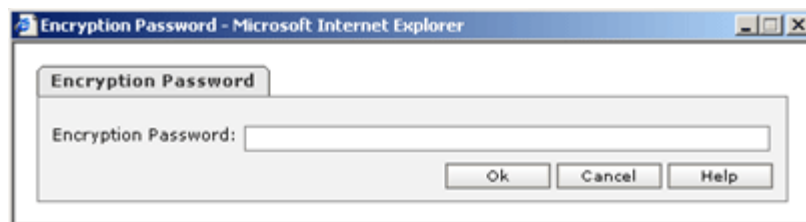
- In Folder/Document List select the versioned document for which you would like to view history.
- Click on the 'Version History' icon [] or select from menu Version->History.



- Document History page will be displayed with the versions.
- Press 'Close' to close the Document History.
- Click on the 'Version History detail' [] icon to view the detail of the selected version.

2.26 How to encrypt a document

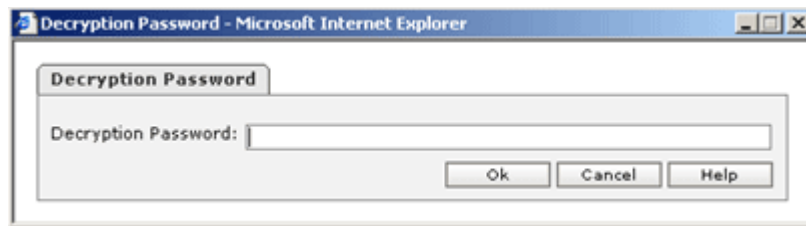
- In Folder/Document List select the document you would like to encrypt.
- Click on the 'Encrypt Document' icon [].



- Enter the Encryption password to encrypt the document
- Press 'OK' if you would like to encrypt the document.
- Press 'Cancel' to abort encryption.


2.27 How to decrypt a document

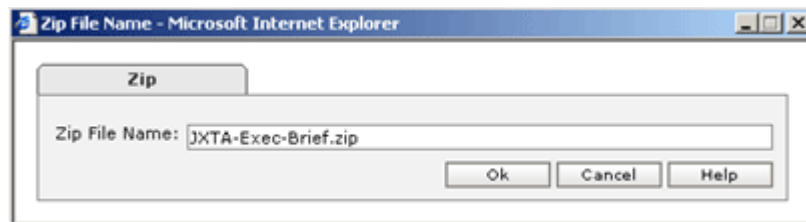
- In Folder/Document List select the document you would like to decrypt.
- Click on the 'Decrypt Document' icon.



- Enter the encryption password to decrypt the document.
- Press 'OK' if you would like to decrypt the document.
- Press 'Cancel' to abort decryption.


2.28 How to zip a document/folder

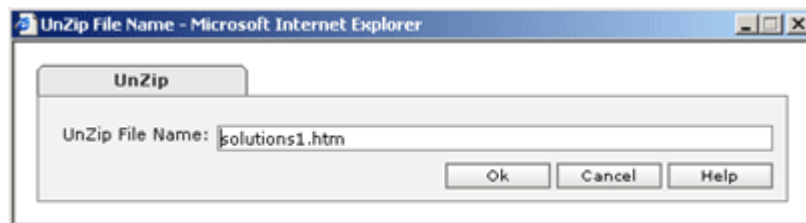
- In Folder/Document List select the document you would like to zip.
- Click on the 'Zip Document' icon [].



- Enter the name of the document to be zipped.
- Press 'Ok' if you would like to zip the document.
- Press 'Cancel' to abort zipping


2.29 How to unzip a document/folder

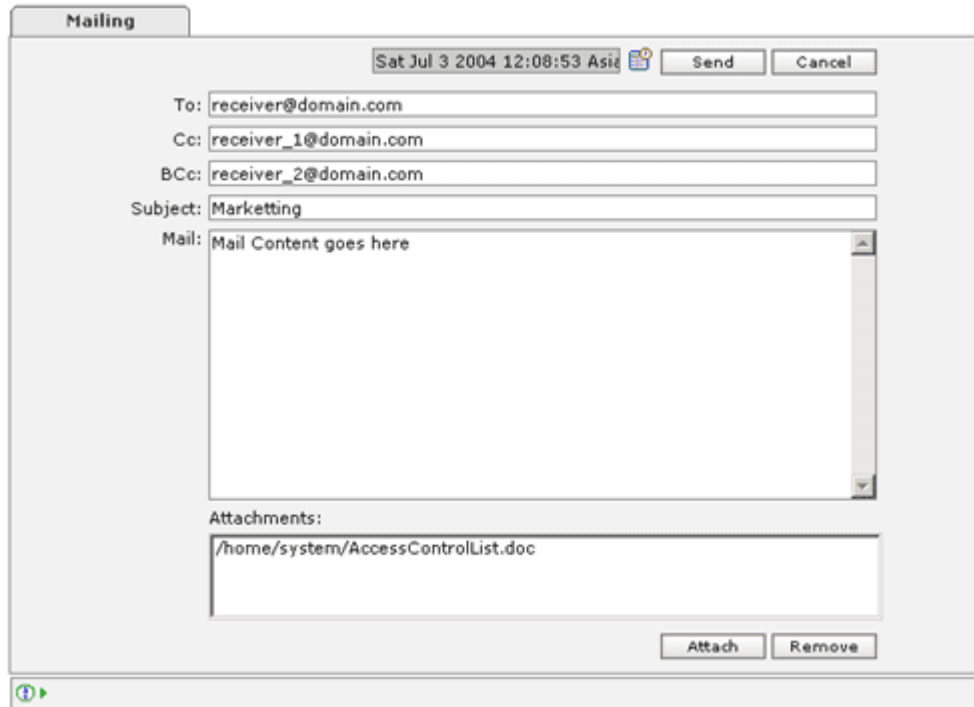
- In Folder/Document List select the document you would like to unzip.
- Click on the 'Unzip' icon [].



- Enter the name of the document to be unzipped.
- Press 'Ok' if you would like to unzip the document.
- Press 'Cancel' to abort unzipping.

2.30 How to email a document

- Select documents you want to be emailed
- Click on the Mail link.
- Click on 'Mail' icon [] from the Folder/Document List, Mail page appears with the selected documents to be mailed.
- This page allows submitting MAIL jobs to the scheduler. The user can specify the date/time on which the job has to be dispatched. If the date is earlier than current date/time, the job will be directly dispatched.




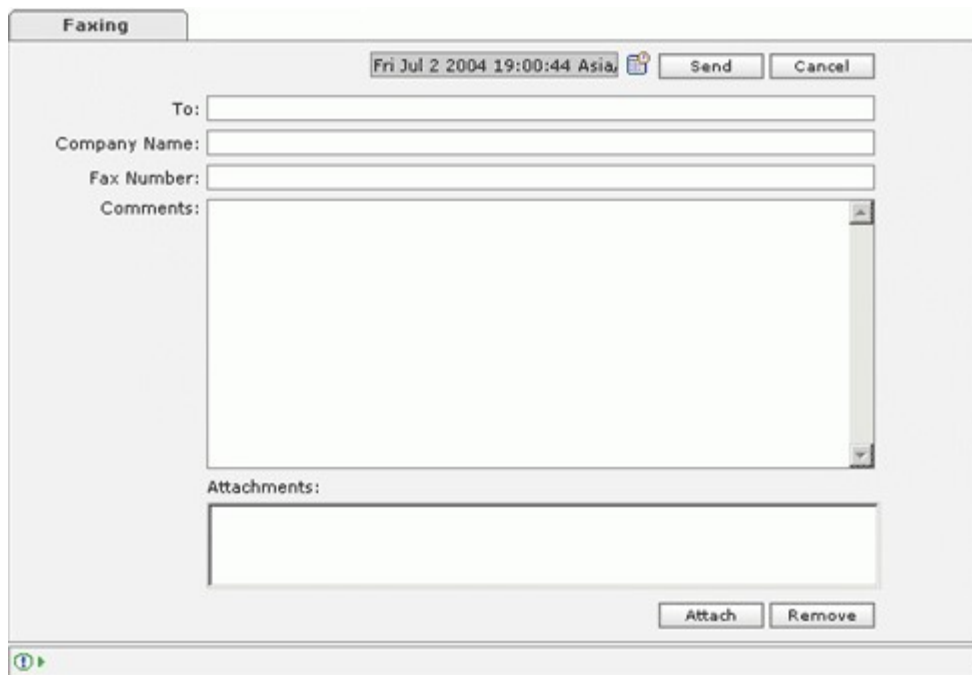
The screenshot shows a 'Mailing' dialog box with the following fields and content:

- To:** receiver@domain.com
- Cc:** receiver_1@domain.com
- Bcc:** receiver_2@domain.com
- Subject:** Marketing
- Mail:** Mail Content goes here
- Attachments:** /home/system/AccessControlList.doc

Buttons for 'Send', 'Cancel', 'Attach', and 'Remove' are present at the bottom of the dialog.

2.31 How to fax a document

- Select documents you want faxed
- Click on the Fax link.
- or Click on 'Fax' icon [] from the Folder/Document List, Mail page appears with the selected documents to be mailed.
- This page allows submitting FAX jobs to the scheduler. The user can specify the date/time on which the job has to be dispatched. If the date is earlier than current date/time, the job will be directly dispatched.

A screenshot of a 'Faxing' dialog box. The title bar reads 'Fri Jul 2 2004 19:00:44 Asia'. At the top right are 'Send' and 'Cancel' buttons. The main area contains four input fields: 'To:', 'Company Name:', 'Fax Number:', and 'Comments:'. The 'Comments:' field is a large text area with a vertical scrollbar. Below these fields is an 'Attachments:' section with an empty list box. At the bottom right are 'Attach' and 'Remove' buttons. A small help icon is visible in the bottom left corner of the dialog.

2.32 How to submit a document/folder to a workflow

- In Folder/Document List select the document for workflow submission.
- Click on the Submit to Workflow icon [→ ♻] or select from menu File->Submit To Workflow.
- Please note it is mandatory that the user's Workflow Acl must be set as well as valid.
- If this is not the case, then the user must contact System Administrator.
- User can view the status of his document by viewing Notification page.

Chapter 3: User Administration

3.1 Introduction:

Samhita users are accounts created in the product to maintain their files and Documents in a structured way. Samhita user accounts can be one of three types:

- **Regular users:** are the end users who will store and retrieve files or other objects in the repository.
- **Administrators:** are the people with privileges to all content and other objects in the repository who can provide other users with the privileges needed to get their jobs done. Administrators manage the users, folder structure, files, themes and access privileges.
- **System Administrators:** are the people with privileges to start, stop, and monitor the Oracle CM SDK domain controller, nodes, services, servers, and agents (through the Oracle Enterprise Manager Website), and who can reconfigure these components as needed. System administrators also have complete Administrator privileges. System administrator's access and control an Oracle CM SDK instance using the Oracle Enterprise Manager Website. The default account that is created during installation for this set of privileges is the system account.

The screenshot shows a web browser window titled "List Of Users - Mozilla Firefox". The address bar displays the URL: http://www.dbseentry.com/samhita/relayAction.do?operation=user_list. The page header includes the "Samhita Document Manager" logo and a navigation menu with items like "User", "Group", "Theme", "Security", "Document", "Scheduler", "Mail", "Fax", "Work Flow", and "Report Bug". A welcome message "Welcome, PSFADMIN" is visible. The main content area is titled "User List" and features a search bar labeled "Search by User Name:". Below the search bar is a table with the following data:


Select	Name	Status	Quota(MB)	Create Date	Owner	ACL	Group
<input type="radio"/>	ADVANTAGEDL	Non-Admin	30	25-Jan-2006	ADVANTAGEDL	Published	WORLD
<input type="radio"/>	AMITMISHRA	Non-Admin	30	21-Nov-2005	AMITMISHRA	Published	WORLD
<input type="radio"/>	archana	Admin	30	16-Aug-2004	archana	Published	WORLD
<input type="radio"/>	ARINBAND	Non-Admin	30	13-Sep-2005	ARINBAND	Published	WORLD
<input type="radio"/>	brajendu	Admin	30	13-Oct-2004	brajendu	Published	WORLD
<input type="radio"/>	DEMOUSER	Non-Admin	30	20-Aug-2005	DEMOUSER	Published	WORLD
<input type="radio"/>	FILESYNCTEAM	Admin	Unlimited	13-Jan-2006	FILESYNCTEAM	Published	WORLD
<input type="radio"/>	guest	Non-Admin	Unlimited	29-Jun-2004	system	Published	WORLD
<input type="radio"/>	hkrein	Non-Admin	30	20-Aug-2004	hkrein	Published	WORLD
<input type="radio"/>	logger	System Admin	Unlimited	10-Aug-2005	logger	Published	WORLD
<input type="radio"/>	maneesh	System Admin	Unlimited	14-Aug-2004	maneesh	Published	Development
<input type="radio"/>	maneeshmishra	Non-Admin	Unlimited	23-Aug-2005	maneeshmishra	Published	WORLD
<input type="radio"/>	manish	System Admin	Unlimited	16-Aug-2004	manish	Published	WORLD
<input type="radio"/>	NAVEEN	Admin	30	10-Apr-2006	NAVEEN	Published	WORLD
<input type="radio"/>	NETSPIDER	Admin	30	08-Sep-2005	NETSPIDER	Published	WORLD

At the bottom of the table area, there is a pagination control showing "Page 1 Of 4".

3.2 How to find a user:

- Enter search condition in 'Search by User Name' either full User Name or the starting words can be entered to search for related Users. (You can also use wild card characters '*' or '?')
- The Users will be displayed in the User List which matches the entered text.
- If the search condition doesn't matches page will be displayed with text 'There is no item to display'.

3.3 How to create a new user:

- You can create one user at a time.
- Click on 'New User' Icon [] from the User List, New User Page appears with default settings.

New User

General:

User Name:

Description:

Credential Manager:

Access Control List:

Password:

Confirm Password:

Status: System Admin
 Admin
 Non Admin

Add Group(s)

Add From Group List ...

Remove From List

Profile:

Home Folder:

Quota: Limited (Storage MB)
 Unlimited

Mail Folder:

Email Address:

Default Document Acl:

Default Folder Acl:

Work Flow Acl:

Language:

Character Set:

Locale:


Time Zone:

Save Cancel

Note:

- A user's home folder is the default directory where a user starts when logging into the application.
- The Email User Profile specifies the user's mail folder location and address.
- Unless you change the default definitions, a user's e-mail folder is created under the home folder. For example, /home/jsmith/mail.

3.4 How to modify a user:

- You can Edit one user at a time.
- Click on 'Edit User' Icon [] from the User List, Edit User Page appears with previously saved data.

Edit User

General:

User Name:

Description:

Credential Manager:

Access Control List:

Password:

Confirm Password:

Status: System Admin
 Admin
 Non Admin

Add Group(s)

Add From Group List ...

WORLD [G]

Remove From List

Profile:

Home Folder:

Quota: Limited (Storage MB)
 Unlimited

Mail Folder:

Email Address:

Default Document Acl:

Default Folder Acl:

Work Flow Acl:

Language:


Character Set:

Locale:

Time Zone:

Save Cancel

3.5 How to Delete a user:

- Select an User from the User list, Click on 'Delete User' icon [], the User will be deleted, User list will get refreshed and will appear with the message in the status Bar as "User 'Steffia' successfully deleted."



Select	Name	Status	Quota (MB)	Create Date	Owner	ACL	Group
<input type="radio"/>	Steffia	Admin	30	31-May-2004	Steffia	Published	Marketing
<input type="radio"/>	User1	Non-Admin	30	28-May-2004	User1	Published	WORLD
<input type="radio"/>	User102	Non-Admin	30	28-May-2004	User102	Published	Group01
<input type="radio"/>	User104	Non-Admin	30	28-May-2004	User104	Published	Group02
<input type="radio"/>	User107	System Admin	30	28-May-2004	User107	Published	WORLD
<input type="radio"/>	dbentry	System Admin	30	08-Apr-2004	system	Published	WORLD
<input type="radio"/>	encrypt	Non-Admin	30	19-Jun-2004	encrypt	Published	WORLD
<input type="radio"/>	jiten	Non-Admin	30	14-Jun-2004	jiten	Published	WORLD
<input type="radio"/>	kamal	System Admin	30	16-Jun-2004	kamal	Published	WORLD
<input type="radio"/>	manee	Non-Admin	30	03-Jul-2004	manee	Published	Group01

3.6 How to change user preferences:

- User Preference is the profile of the logged-in user where information related to his profile is displayed.
- The preferences of the logged-in user can be set like
 - 'Login Password'.
 - 'Watch Documents'.
 - 'Encrypt/Decrypt Password'.
- 'Permitted tree access level'.
 - 'Items to be displayed per page'.
 - 'Themes'.
 - 'Open Document In New Window '.

User Preference
Adapter Preference

My Profile:

Watch Documents:
 -

User Name:

Description:

Home Folder:

Quota:

Group:

Email Address:

Mail Folder:

Access Control List:

Default Document Acl:

Default Folder Acl:

Language:

Character Set:

Locale:

Time Zone:

Select a Theme:

Navigation Type:

Open Document In New Window

* Permitted Tree Access Level:

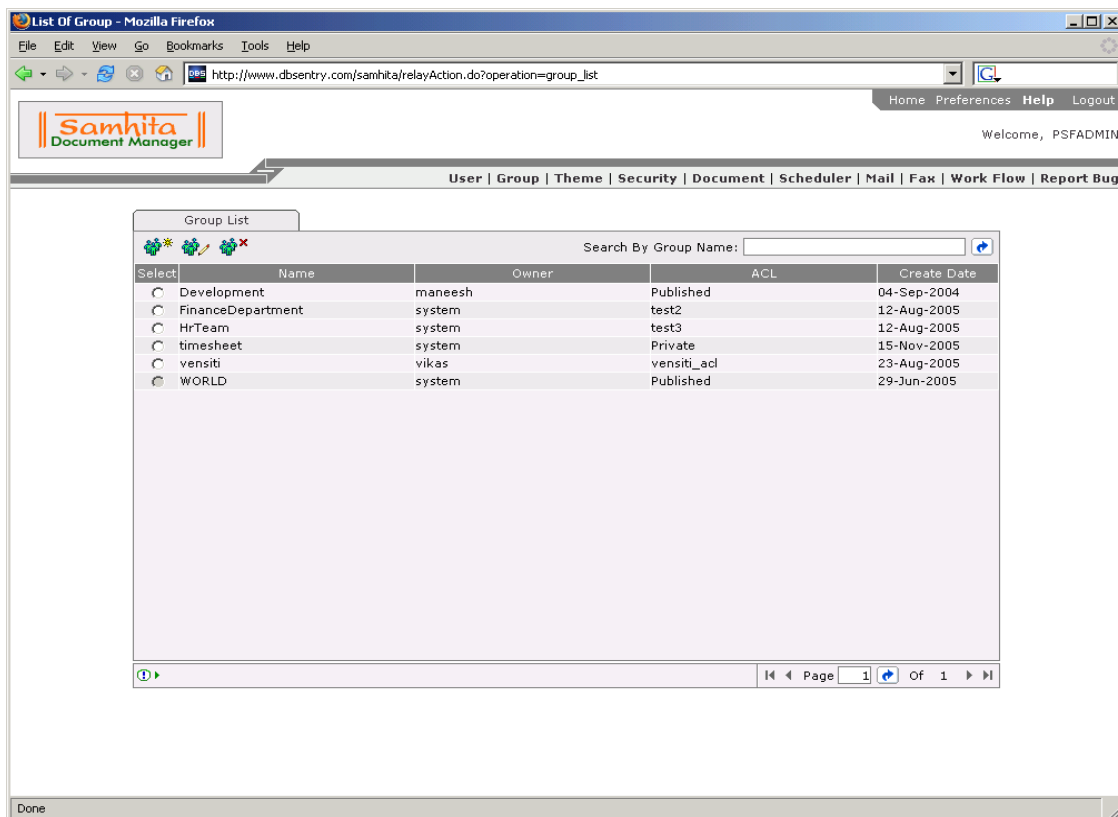
Items to be Displayed per page:

* Please Re-Login for the changes to take effect.

Chapter 4: Group Administration

4.1 Introduction:

- Groups are composed of users that are related in some way. For example, the Marketing group might contain all of the members of the corporate marketing organization.
- Groups simplify user management. Instead of adding each user to an ACL for a file or folder, you can add a group of users all at the same time. Samhita product is shipped with WORLD, a default group. When users are created, they are automatically added to this group. To create a group, you define the group itself, then populate it. Group names are unique within the owner's set of groups.
- The default ACL of the user that created this group is assigned to any new group the user creates. If you need to change the default ACL, you can do so by modifying the ACL for a specific group




4.2 How to find a group

- Enter search condition in 'Search by Group Name' either full Group Name or the starting words can be entered to search for related Groups.(You can also use wild card characters '*' or '?'.)
- The Group(s) will be displayed in the Group List which match the entered text.
- If the search condition doesn't match,a page will be displayed with text 'There is no item to display'.

4.3 How to create a new group

- You can create one group at a time.
- Click on New Group icon [] from the Group List, New Group Page appears with default settings.



New Group

Group Name: Enter Group Name here

Description: Write a description note for this group.

Access Control List: ...

Add Users/Groups:


User Group

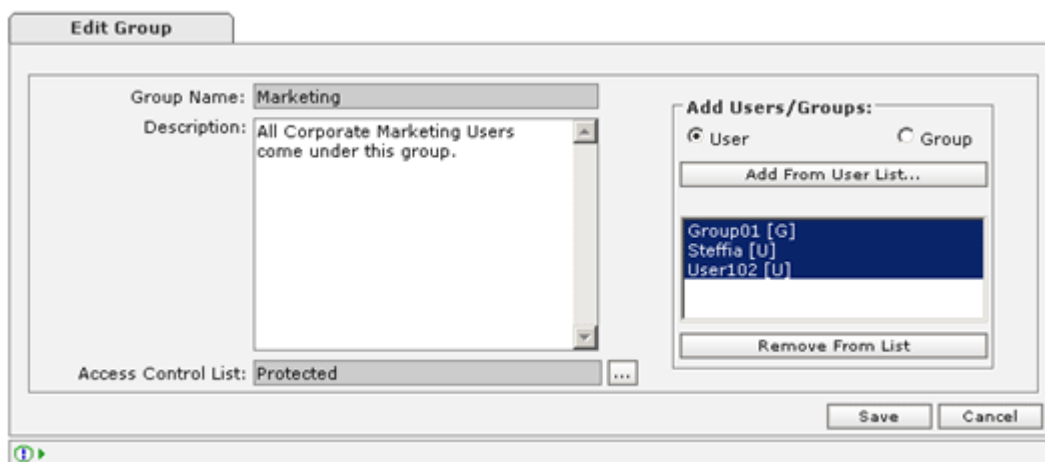
Add From User List...

Remove From List

Save Cancel

4.4 How to modify a group:

- You can edit one group at a time.
- Click on 'Edit Group' icon [] from the Group List, Edit Group Page appears with previously saved data.



Edit Group

Group Name: Marketing

Description: All Corporate Marketing Users come under this group.

Access Control List: Protected ...

Add Users/Groups:

User Group


Add From User List...

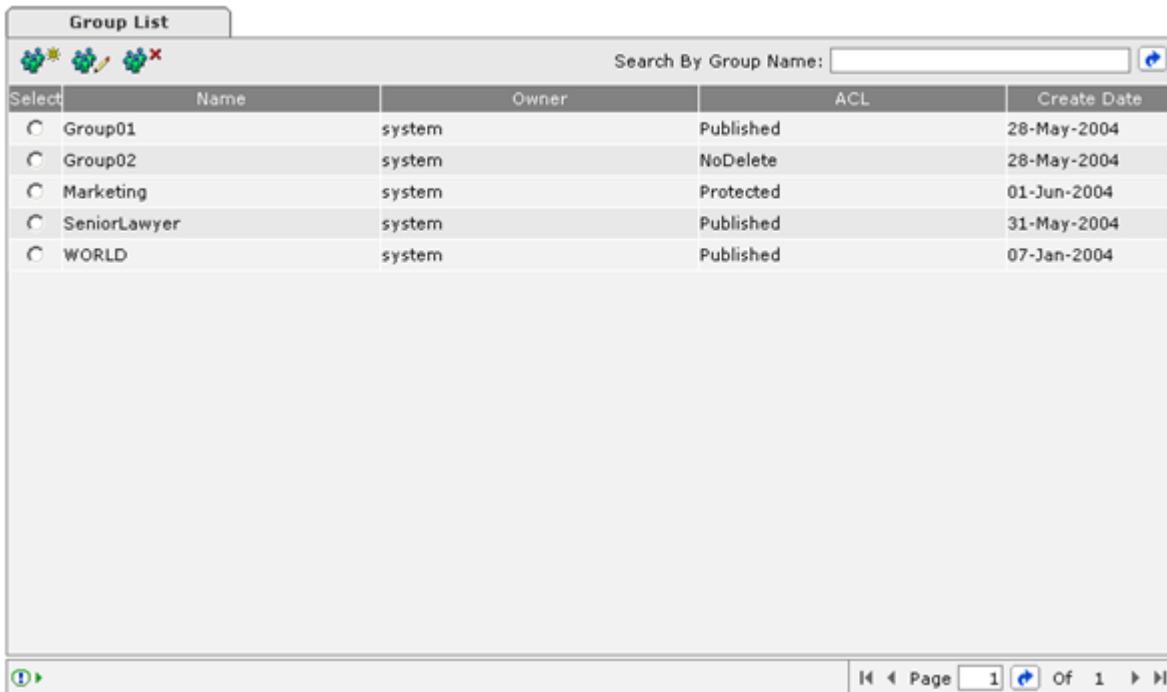
Group01 [G]
Steffia [U]
User102 [U]

Remove From List

Save Cancel

4.5 How to delete a group:

- Select a Group from the Group list, Click on 'Delete Group' icon [], the Group will be deleted, Group list will get refreshed and will appear with the message in the status Bar as "Group 'Marketing' successfully deleted".



Select	Name	Owner	ACL	Create Date
<input type="radio"/>	Group01	system	Published	28-May-2004
<input type="radio"/>	Group02	system	NoDelete	28-May-2004
<input type="radio"/>	Marketing	system	Protected	01-Jun-2004
<input type="radio"/>	SeniorLawyer	system	Published	31-May-2004
<input type="radio"/>	WORLD	system	Published	07-Jan-2004

Chapter 5: Security Administration

5.1 Introduction and what is Access Control List (ACL)

- Access permissions on *PublicObjects are managed with AccessControlLists (ACL's). Whenever a user tries to access a *PublicObject, It first checks the associated AccessControlList to verify that the user has been granted the appropriate permissions.
- An AccessControlList is a list of users and groups who have been granted or revoked access permissions to the *PublicObject. Each time a user or group is granted or revoked access permissions, an entry is added to the AccessControlList.
- In most cases, the standard ACL's that come with application should meet your needs, and the remaining cases can be handled by creating a new ACL.
- Application resolves a user's effective access to a *PublicObject by aggregating the AccessControlEntries in the order that they were created in the AccessControlList. Each AccessControlList is defined independently and applied to one or more *PublicObjects, allowing you to centrally manage common security levels for *PublicObjects. Any user can create an AccessControlList. When an AccessControlList is created, the user can determine who else can apply the AccessControlList to *PublicObjects and manage the AccessControlList entries. In this way, users can create personal AccessControlLists that they use to manage access to their information, or share AccessControlLists to manage access to information that they collaborate on with other users. Typically, a *PublicObject has only one AccessControlList. When a user tries to access the *PublicObject, all AccessControlLists will be used to resolve the user's permissions. While AccessControlLists can be used to grant and revoke standard permissions defined by Application, including Discover, GetContent, SetAttribute, SetContent, and Delete, Application allows you to define custom permissions.

The screenshot shows the 'ACL List' page in the Samhita Document Manager. The page has a navigation bar with links for Home, Preferences, Help, and Logout. Below the navigation bar, there are tabs for 'User | Group | Theme | Security | Document | Scheduler | Mail | Fax | Work Flow | Report Bug'. The main content area features a 'Permission Bundle' tab and a search bar labeled 'Search Acl:'. Below the search bar is a table with the following data:

Select	ACL Name	Owner	Securing Ad	Is Shared	Modified
<input type="radio"/>	bulbulAcl	maneesh	Published	true	19-Aug-2005
<input type="radio"/>	ClassPrivate	system	Published	true	29-Jun-2005
<input type="radio"/>	ClassPublic	system	Published	true	29-Jun-2005
<input type="radio"/>	ClassRestrictCreation	system	Published	true	29-Jun-2005
<input type="radio"/>	demouser	DEMOUSER	Published	true	18-Nov-2005
<input type="radio"/>	Private	system	Published	true	29-Jun-2005
<input type="radio"/>	Protected	system	Published	true	29-Jun-2005
<input type="radio"/>	PSF_NIH	system	Published	true	21-Mar-2006
<input type="radio"/>	PSF_NORTH	system	Published	true	10-Apr-2006
<input type="radio"/>	PSHR_NORTH	system	Published	true	29-Mar-2006
<input type="radio"/>	Public	system	Published	true	29-Jun-2005
<input type="radio"/>	Published	system	Published	true	29-Jun-2005
<input type="radio"/>	samAcl	system	Published	true	19-Aug-2005
<input type="radio"/>	SamhitaAcl	system	Published	true	17-Aug-2005
<input type="radio"/>	SamhitaAcl	rajan	Published	true	16-Aug-2005

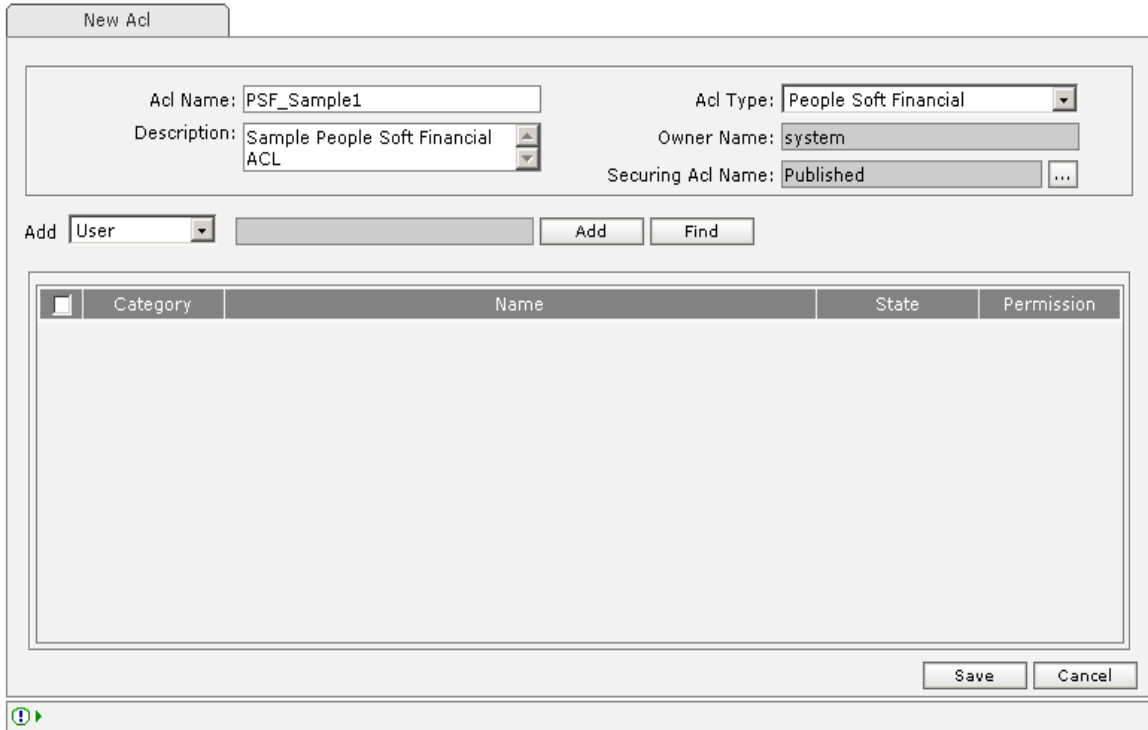
At the bottom of the table, there are navigation controls showing 'Page 1 Of 2'.

5.2: How to search for an ACL:

- Enter search condition in 'Search ACL' either full ACL Name or the starting words can be entered to search for related ACL's.(You can also use wild card characters '*' or '?')
- The ACL will be displayed in the ACL List which match the entered text.
- If the search condition doesn't match,a page will be displayed with text 'There is no item to display'.

5.3 How to create a new ACL:

- You can create one ACL at a time.
- Click on 'New ACL' icon [] from the ACL List, New ACL page appears with the default settings.



New Acl

Acl Name: PSF_Sample1 Acl Type: People Soft Financial

Description: Sample People Soft Financial ACL Owner Name: system


Securing Acl Name: Published


Add User Add Find

Category	Name	State	Permission
----------	------	-------	------------

Save Cancel

5.4: How to Edit an ACL:

- You can edit one ACL at a time.
- Click on 'Edit ACL' icon [] from the ACL List, Edit ACL page appears with default settings.



Edit Acl

Acl Name: ClassRestrictCreation Owner Name: system


Description: Securing Acl Name: Published

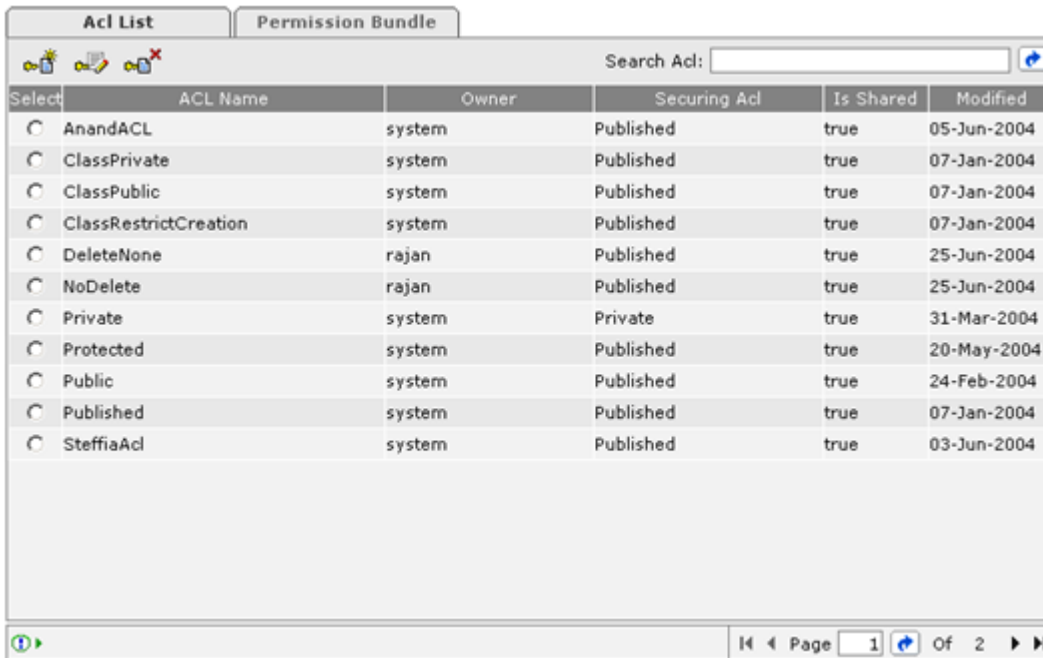
Add User Add Find Remove

Category	Name	State	Permission
<input type="checkbox"/> Group	WORLD	Granted	...

Save Cancel

5.5 How to Delete an ACL:

- Select an ACL from the ACL list, Click on 'Delete ACL' icon [], the selected ACL will be deleted, ACL list will get refreshed and will appear with the message in the status Bar as "ACL 'SteffiaAcl' successfully deleted."



Select	ACL Name	Owner	Securing Acl	Is Shared	Modified
<input type="radio"/>	AnandACL	system	Published	true	05-Jun-2004
<input type="radio"/>	ClassPrivate	system	Published	true	07-Jan-2004
<input type="radio"/>	ClassPublic	system	Published	true	07-Jan-2004
<input type="radio"/>	ClassRestrictCreation	system	Published	true	07-Jan-2004
<input type="radio"/>	DeleteNone	rajan	Published	true	25-Jun-2004
<input type="radio"/>	NoDelete	rajan	Published	true	25-Jun-2004
<input type="radio"/>	Private	system	Private	true	31-Mar-2004
<input type="radio"/>	Protected	system	Published	true	20-May-2004
<input type="radio"/>	Public	system	Published	true	24-Feb-2004
<input type="radio"/>	Published	system	Published	true	07-Jan-2004
<input type="radio"/>	SteffiaAcl	system	Published	true	03-Jun-2004

5.6 What is Permission Bundle:

- To manage access more broadly than the permissions defined by AccessLevel, you can use PermissionBundle to group AccessLevels. PermissionBundles are stored persistently in the database, and can be used to represent higher level security settings which may be granted to users.
- For example, you might group the Discover, Add Item, and Remove Item permissions together into a ModifyFolder Permission Bundle to more easily grant users the ability to modify folders.

5.7 How to Search Permission Bundle:


- Enter search condition in 'Search Permission' either full Permission Bundle Name or the starting words can be entered to search for related Permission Bundle. (You can also use wild card characters '*' or '?')
- The Permission Bundles will be displayed in the Permission Bundle List which match the entered text.
- If the search condition doesn't match, a page will be displayed with text 'There is no item to display'.

5.8 What is Permission Bundle List:

- Permission Bundle List consists of the Permission Bundles.

Select	Permission Name	Description
<input type="radio"/>	AddDocFolder	
<input type="radio"/>	All	All standard Permissions enabled
<input type="radio"/>	ClassPublic	SelectorAccess, Create Permissions enabled
<input type="radio"/>	ClassRestrictCreation	SelectorAccess Permission enabled
<input type="radio"/>	Delete	Delete, Discover Permissions enabled
<input type="radio"/>	DeleteNone	
<input type="radio"/>	Modify	All modifying Permissions enabled
<input type="radio"/>	ModifyFolder	Group the Discover, Add Item, and Remove Item permissions together into a ModifyFolder Permission Bundle to more easily grant users the ability to modify folders.
<input type="radio"/>	Protected	Discover, AddItem, RemoveItem Permissions enabled
<input type="radio"/>	Read	Discover, GetContent Permissions enabled
<input type="radio"/>	rtwertert	

5.9 How to create a Permission Bundle:

- You can create one Permission Bundle at a time.
- Click on 'New Permission Bundle' icon [] from the Permission Bundle List, New Permission Bundle Page appears with default settings.

Permission Bundle Name:

Description:

Access Level:


Available Permissions

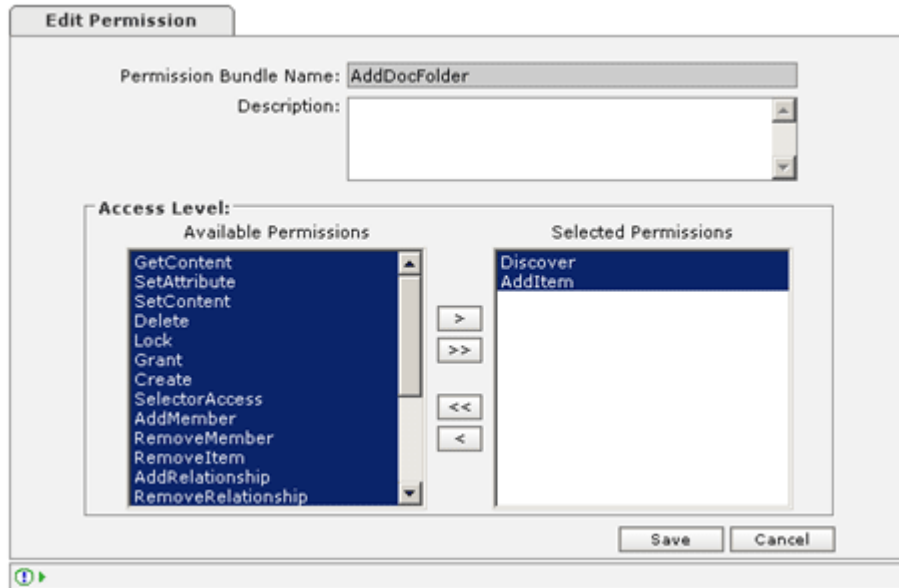
- Discover
- GetContent
- SetAttribute
- SetContent
- Delete
- Lock
- Grant
- Create
- SelectorAccess
- AddMember
- RemoveMember
- AddItem
- RemoveItem

Selected Permissions

Save Cancel

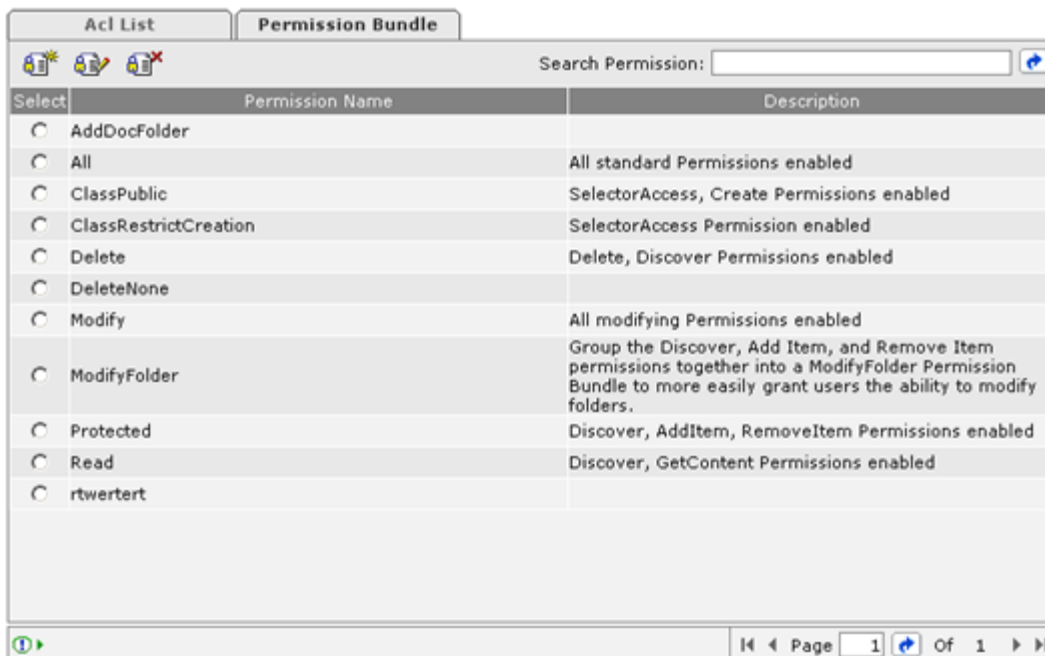
5.10 How to Edit a Permission Bundle:

- You can edit one Permission Bundle at a time.
- Click on 'Edit Permission Bundle' Icon [] from the Permission Bundle List, Edit Permission Bundle Page appears with the previously saved data.



5.11 How to Delete a Permission Bundle:

- Select a Permission Bundle from the Permission Bundle list, Click on Delete 'Permission Bundle' icon, the Permission Bundle will be deleted, Permission Bundle list will get refreshed and will appear with the message in the status Bar as "Permission Bundle 'BundleName' successfully deleted."



Chapter 6: Scheduler

6.1 Introduction:

- Scheduler is the background process responsible for scheduling mail/fax jobs. Scheduler keeps track of the entire scheduled jobs and dispatches them on the specified DateTime.

Select	Job Name	Job Type	User	Create Date	Dispatch Date	Status(No of attempts/Error Message)
<input type="radio"/>	job_system16:14:43--2004-12-06-IST	MAIL	system	12/06/2004 16:14:43 IST	12/10/2004 16:13:49 IST	0/NA
<input type="radio"/>	job_system16:16:37--2004-12-06-IST	FAX	system	12/06/2004 16:16:37 IST	12/13/2004 16:14:53 IST	0/
<input type="radio"/>	job_system16:15:01--2004-12-06-IST	MAIL	system	12/06/2004 16:15:01 IST	12/18/2004 16:14:04 IST	0/NA

6.2 How to Start/Stop the scheduler

- In Scheduler List there is a toggle icon which stops the scheduler if it is currently started and vice versa.

6.3 Search a Job

Job search can be done with following criteria:

- User: Enter the name of the user who created the job.
- Job Type: Select the type of job that is MAIL, FAX or ALL.
- Created Date:
 - From: Enter the 'From' create time/date for job as search criteria.
 - To: Enter the 'To' create time/date for job as search criteria.
- Dispatch Date:

- From: Enter the 'From' dispatch time/date for job as search criteria.
- To: Enter the 'To' dispatch time/date for job as search criteria.

Select	Job Name	Job Type	User	Create Date	Dispatch Date	Status(No. of attempts/Error Message)
<input type="radio"/>	job_system16:14:43--2004-12-06-IST	MAIL	system	12/06/2004 16:14:43 IST	12/10/2004 16:13:49 IST	0/NA
<input type="radio"/>	job_system16:16:37--2004-12-06-IST	FAX	system	12/06/2004 16:16:37 IST	12/13/2004 16:14:53 IST	0/
<input type="radio"/>	job_system16:15:01--2004-12-06-IST	MAIL	system	12/06/2004 16:15:01 IST	12/18/2004 16:14:04 IST	0/NA

- The jobs which match the given criteria will be displayed in the joblist.
- If the search condition doesn't match, a page will be displayed with text 'There is no item to display'.
- All the search criteria given above are optional and can be given in any combination. If none is given then a list of all the jobs will be listed.

6.4 Create a new Job

- Scheduling is done through the Mail & Fax Interface. For scheduling a job you either create a mail job or a fax job.


6.5 Reschedule a new Job

- In Scheduler List first select the Job to be re-scheduled.
- Click on the 'Re-schedule a job' Icon [].

- Re-schedule job page will be displayed.

- Change the date/time for 'Dispatch Date:'
- Press 'Ok' to reschedule the Job.
- Press 'Cancel' to abort changes.

6.6 Delete a Job

- Select a Job from the Job list, Click on Delete Job Icon [], the Job will be deleted, Job list will get refreshed and will appear with the message in the status Bar as Job successfully deleted.

Scheduler List

Job Info: User: ... Job Type: All

Created Date: From: To:

Dispatch Date: From: To:


Select	Job Name	Job Type	User	Create Date	Dispatch Date	Status(No of attempts/Error Message)
<input type="checkbox"/>	job_system16:14:43--2004-12-06-IST	MAIL	system	12/06/2004 16:14:43 IST	12/10/2004 16:13:49 IST	0/NA
<input type="checkbox"/>	job_system16:16:37--2004-12-06-IST	FAX	system	12/06/2004 16:16:37 IST	12/13/2004 16:14:53 IST	0/
<input type="checkbox"/>	job_system16:15:01--2004-12-06-IST	MAIL	system	12/06/2004 16:15:01 IST	12/18/2004 16:14:04 IST	0/NA

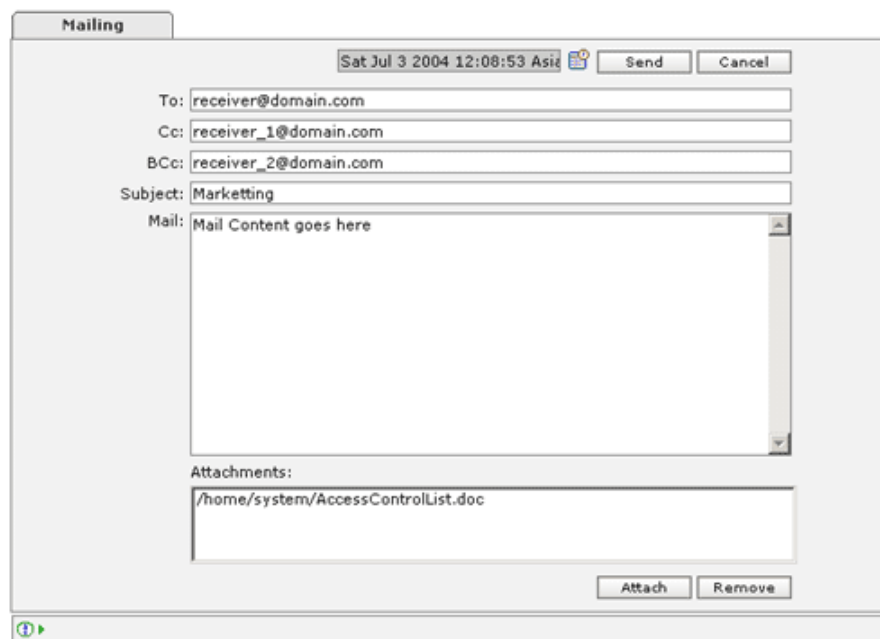
Chapter 7: Mail and Fax

7.1 Introduction

- Mail and Fax allows you to email or fax a document.
- Email or Fax functionality can be access in two ways:
- First, select Mail or Fax icon from the Users Home Page
- Second, select documents and click on mail or fax icon on the toolbar

7.2 How to create a mail job:

- Click on the Mail link.
- or Click on 'Mail' icon [] from the Folder/Document List, Mail page appears with the selected documents to be mailed.
- This page allows submitting MAIL jobs to the scheduler. The user can specify the date/time on which the job has to be dispatched. If the date is earlier than current date/time, the job will be directly dispatched.




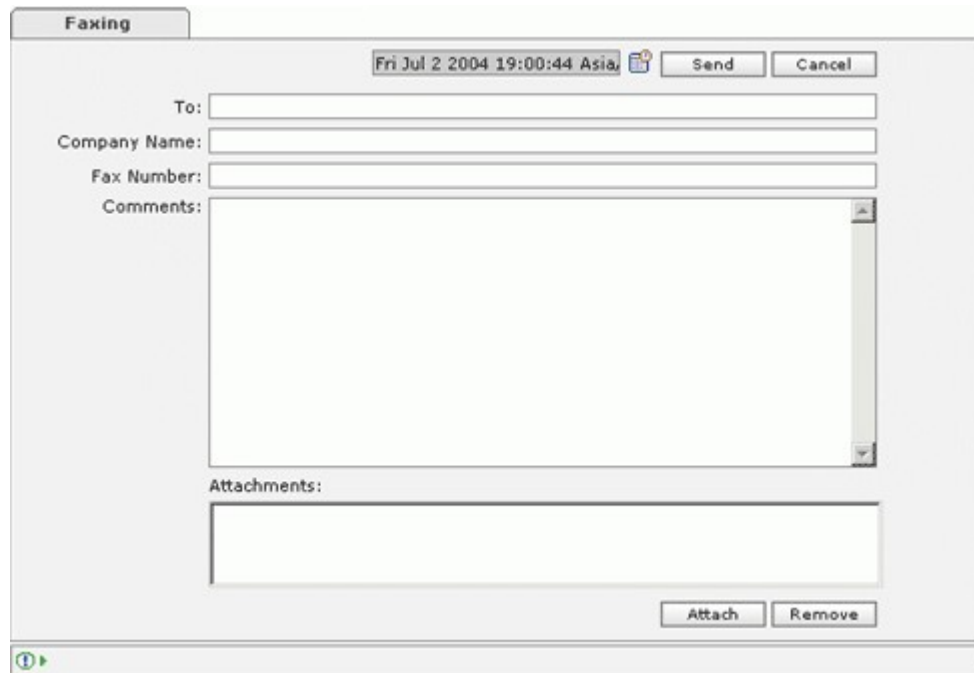
The screenshot shows a 'Mailing' dialog box with the following fields and content:

- To:** receiver@domain.com
- Cc:** receiver_1@domain.com
- Bcc:** receiver_2@domain.com
- Subject:** Marketing
- Mail:** Mail Content goes here
- Attachments:** /home/system/AccessControlList.doc

Buttons: Send, Cancel, Attach, Remove.

7.3 How to create a fax Job:

- Click on the Fax link.
- or Click on 'Fax' icon [] from the Folder/Document List, Mail page appears with the selected documents to be mailed.
- This page allows submitting FAX jobs to the scheduler. The user can specify the date/time on which the job has to be dispatched. If the date is earlier than current date/time, the job will be directly dispatched.



The image shows a web-based 'Faxing' form. At the top, there is a tab labeled 'Faxing'. Below the tab, the current date and time are displayed as 'Fri Jul 2 2004 19:00:44 Asia', followed by a small icon and two buttons: 'Send' and 'Cancel'. The form contains several input fields: 'To:', 'Company Name:', and 'Fax Number:', each with a corresponding text box. Below these is a larger 'Comments:' text area with a vertical scrollbar. At the bottom of the form is an 'Attachments:' section with a text box and two buttons: 'Attach' and 'Remove'. A small help icon is visible in the bottom-left corner of the form's border.

Chapter 8: Workflow

8.1 Introduction

- Workflow automates and streamlines business processes contained within and between enterprises.
- For example, you can use workflow processes to:
 - Add personalized trading partner rules
 - Validate self-service transactions
 - Achieve closed loop business intelligence
 - Approve standard business documents
 - Step through daily transaction flows
 - Integrate with trading partner systems
- Workflow lets you focus on managing business processes, not individual transactions.
- Samhita workflow has been modelled in such a way that it can accommodate both types of workflow ie
 - 1) Where only one approver is present.
 - 2) Where a list of approvers are present according to a hierarchy

When a list of approvers are present according to a hierarchy, the workflow process takes the approval requisition from one approver to his immediate senior (if the previous approver approves it) else rejection by any approver leads to the rejection of the requisition and the requestor is notified.

The last person in this hierarchy is the final approver. If he decides to approve the document, the document is finally approved and a notification is sent to the requestor.

The requestor also gets the notification regarding the movement of document along the hierarchy.

8.2 How to use Workflow:

Following are the necessary steps for using workflow

- 1) First create an ACL for the list of approvers: Create a permission bundle named "approver"

with GetContent and Discover permissions. Create an ACL with list of users which will act as approvers in the same hierarchy as the organizational structure with grant on "approver" permission bundle (if there is only one approver then only one entry will be there in this acl). The last person/user in this ACL is the highest in the hierarchy. This particular ACL's name should start with "wf".

Acl Name: Owner Name:
 Description: Securing Acl Name: ...

Add


<input type="checkbox"/>	Category	Name	State	Permission
<input type="checkbox"/>	User	SPIERSON	Granted	...
<input type="checkbox"/>	User	KWALKER	Granted	...

2) Edit the user who will act as requestor and select the workflow ACL for him. Save the settings.

General:
 User Name: Password:
 Description: Confirm Password:
 Status: System Admin
 Admin
 Non Admin
 Add Group(s):

Profile:
 Home Folder: Mail Folder: Language:
 Quota: Limited (Storage MB) Email Address: Character Set:
 Unlimited Default Document Acl: ... Locale:
 Default Folder Acl: ... Time Zone:
 Work Flow Acl: ... X

3) Now the user is workflow enabled and he can submit docs for approval.

4) Go to the document page with requester logged in and select one document and click on "Submit to workflow icon" [] or select from menu File->Submit To Workflow.

5) Now the requester can go to his notifications page and view the document status and its movement. He shall also get the final result as notification ie (approved or rejected). All the

doc is considered approved.

Notification Details

Notification Name: REQUISITION_APPROVED

Notification Sent: BLEWIS


Notification Subject: Requisition architecture.htm has been approved

Notification Comments:

Dear Mr BLEWIS
The Document architecture.htm with URL Document URL :
<http://192.168.0.1:8988/dmsWorkspace-dms-context-root/showContentAction.do?auth=AAABUVFD%2BshB9iCrhIai46CZb2Rg55CMKRnk%0AaUtCBPKw%2Fn22xEgVXclM0aSg0GXCv%2FUoVjxZeJmAP6Sbe7iBVesAqnsaIqvB1dj83dZa43J85gXJ%0AgavD7%2B3U5wbzU%2FyoQsVI7VE5XKMICoChvFC5mPjih92EeRTv6YvZqiQYzCYldClWN9eBSLyMGPU%0AxaYZiHk%3D> and Description Requisition for approval has been approved.

Approved By: KWALKER


Note From Approver: good work

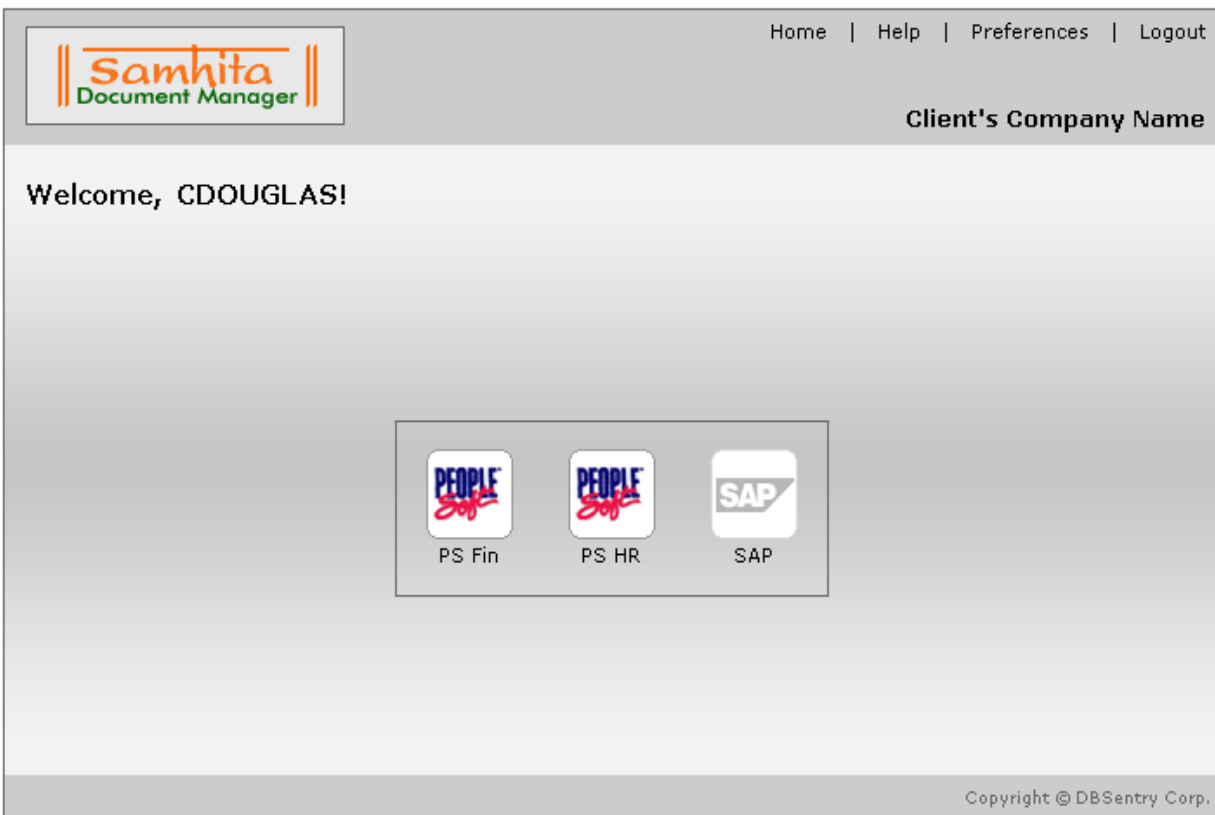


Chapter 9: Adapters

9.1 Introduction:

Adapter facilitates integration of various ERP applications and Samhita.

- At present, Samhita provides tight integration with People Soft Financials , People Soft HR and SAP.
- In order to access adapters , click on the "Adapter" [] icon on the home page.
- A page with various appropriate enabled adapters is displayed as shown below.



Sample Adapter Screen

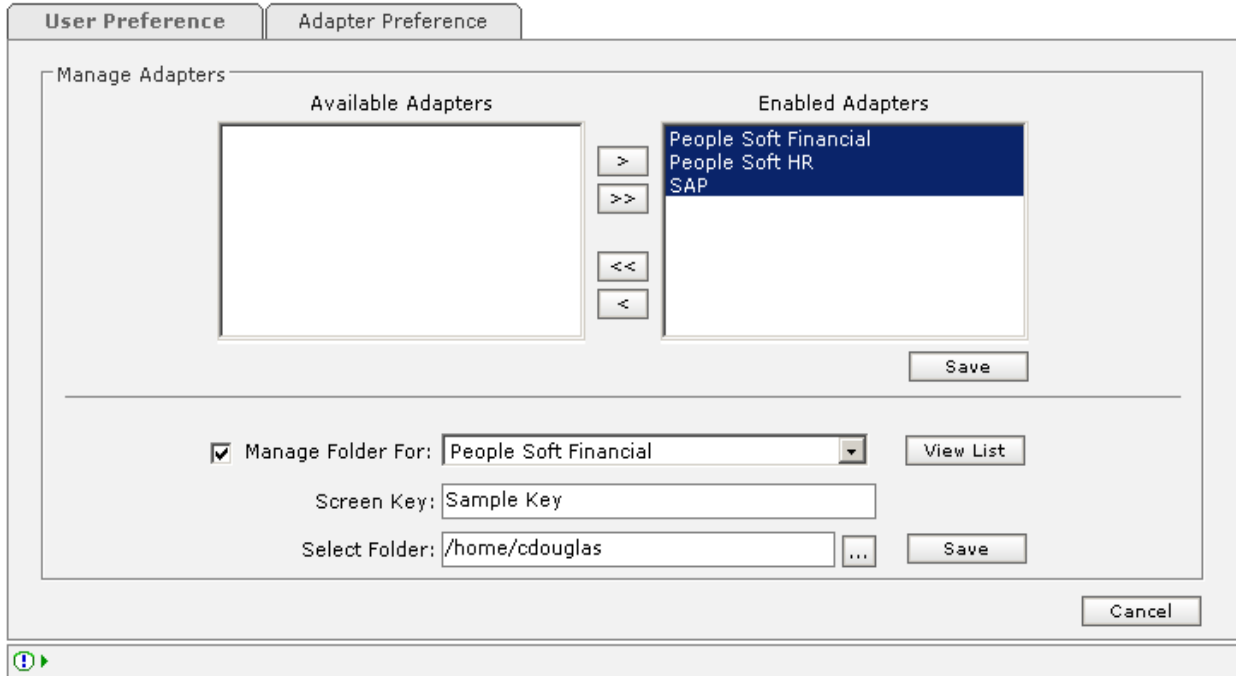
- Here , "PS Fin" and "PS HR" are enabled adapters while "SAP" is the disabled adapter.

- Not every user has adapter access by default. Only those users whose name appear in adapter specific ACLs will be able to access adapters.

9.2 Adapter Preferences:

Adapter Preference is the user interface through which system administrator can manage adapters in samhita.

- The preferences can be set for
 - Enabling / Disabling Adapters
 - Managing Folders For Adapters



9.3 How to enable/disable an adapter:

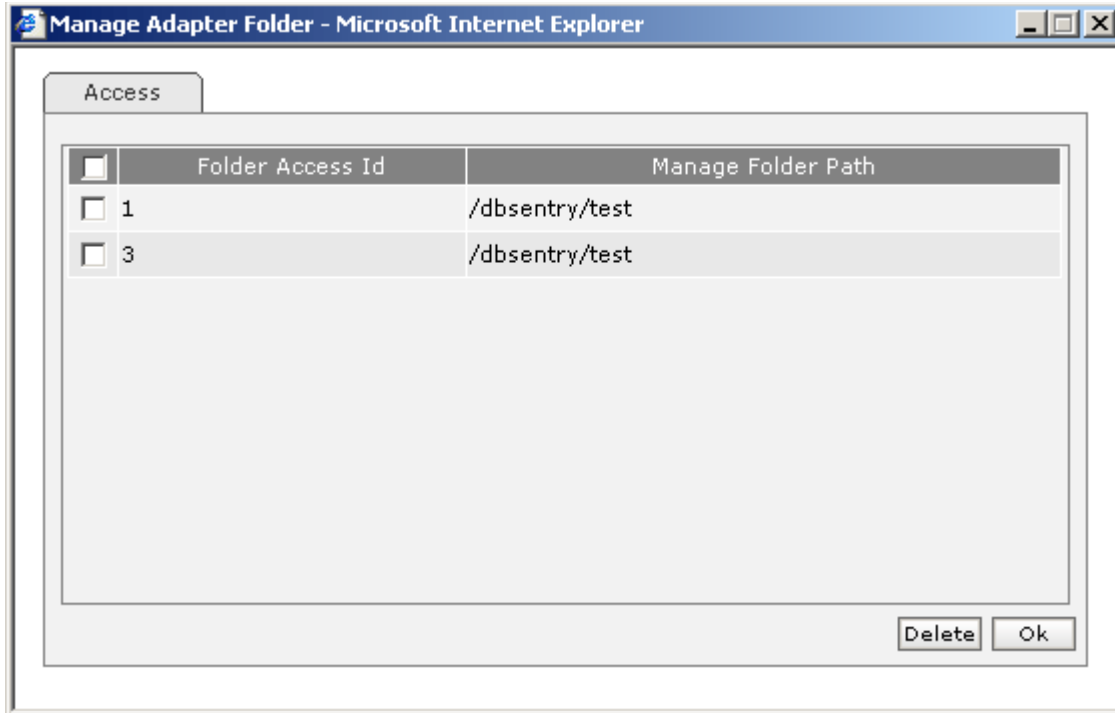
Inorder to enable adapters,

- Select the desired adapters from "Available Adapters "and move them to "Enabled Adapters"
- Click "Save" below "Enabled Adapters" in fig 1 to save the changes made

Inorder to disable adapters,

- Select the desired adapters from "Enabled Adapters "and move them to "Available Adapters"
- Click "Save" below "Enabled Adapters" in fig 1 to save the changes made

9.4 How to manage folders for adapter:



To create a new screen key for an enabled adapter:

- Select the adapter from the dropdown next to "Manage Folder For" as shown in fig 1
- Select "Manage Folder For" option as shown in fig 1
- Enter a new and unique Screen Key
- Select the desired folder to which this key should correspond using the Look In... button
- Once the screen key and folder path have been entered, Click "Save" adjacent to the Look In... button in fig 1 to create and save the key

To view the list of screen key(s) for an enabled adapter:

- Select the adapter from the dropdown next to "Manage Folder For"
- Click "View List" to view the list of screen keys and the corresponding folder paths

To delete screen key(s) for an enabled adapter:

- Select the adapter from the dropdown next to "Manage Folder For"
- Click "View List" to view the list of screen keys and the corresponding folder paths as shown in illustration.
- Select the key(s) to be deleted and press "Delete" to delete the same
- Please note that deleting key(s) does not delete the corresponding folder(s)

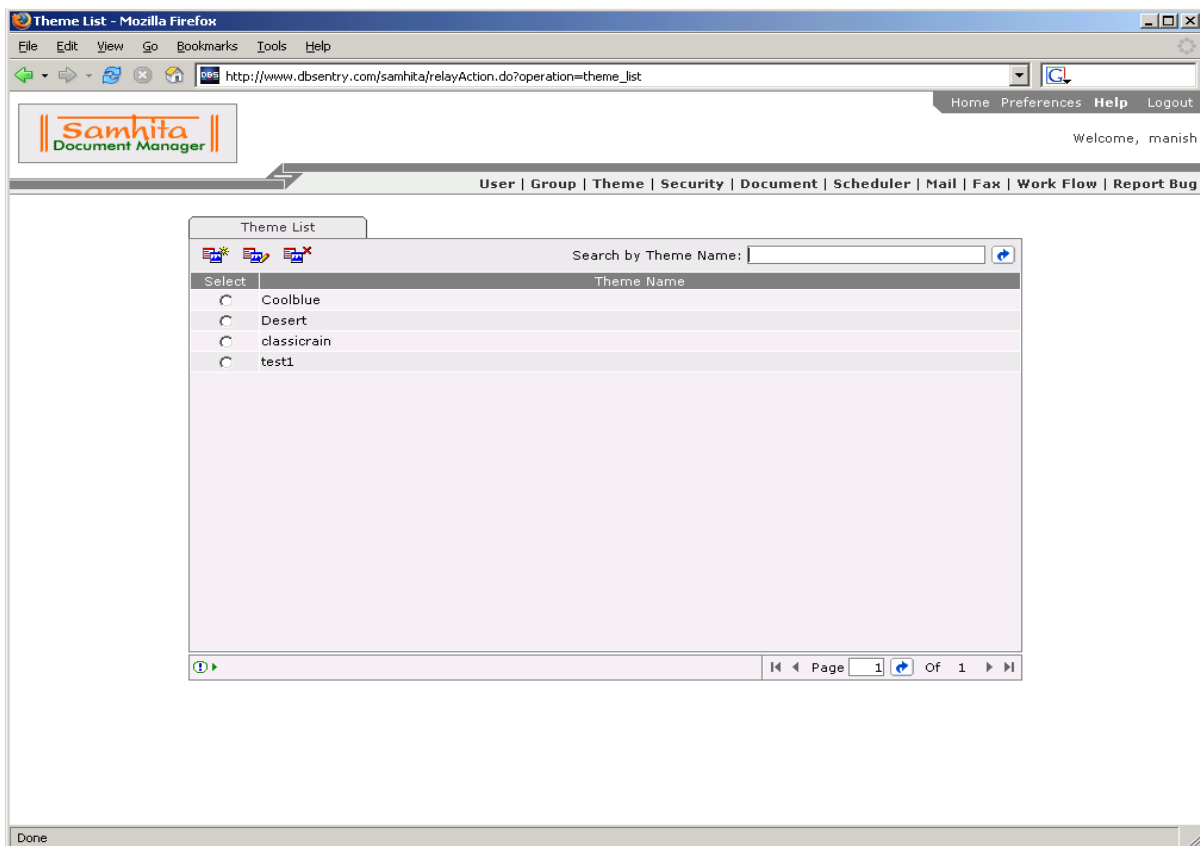
Chapter 10: Themes

10.1 Introduction:

Theme helps in customizing user interface by selecting the supplied or customizable themes. Theme consists of 4 parts:

- Style
- Color scheme
- Fonts
- Backgrounds

Only Super Users (Administrator) have rights to create/modify/delete Themes. Normal Users can only select the Theme for themselves.



10.2 How to apply theme:

- Click Preferences
- Select the Theme from 'Select a Theme' option in the User Preference page.
- Press 'Preview' to see the preview of the Theme selected from the above mentioned option.
- Press 'OK' to apply the changes to the User-Interface.
- Press 'Cancel' to go back to the previous page accessed.

Note: To Create, Modify or Delete a theme, user should have access rights to Themes.

10.3 How to Search a theme:


- Enter search condition in 'Search by Theme' either full Theme Name or the starting words can be entered to search for related Themes.
(You can also use wild card characters '*' or '?')
- The Themes will be displayed in the Theme List which match the entered text.
- If the search condition doesn't match, a page will be displayed with text 'There is no item to display'.

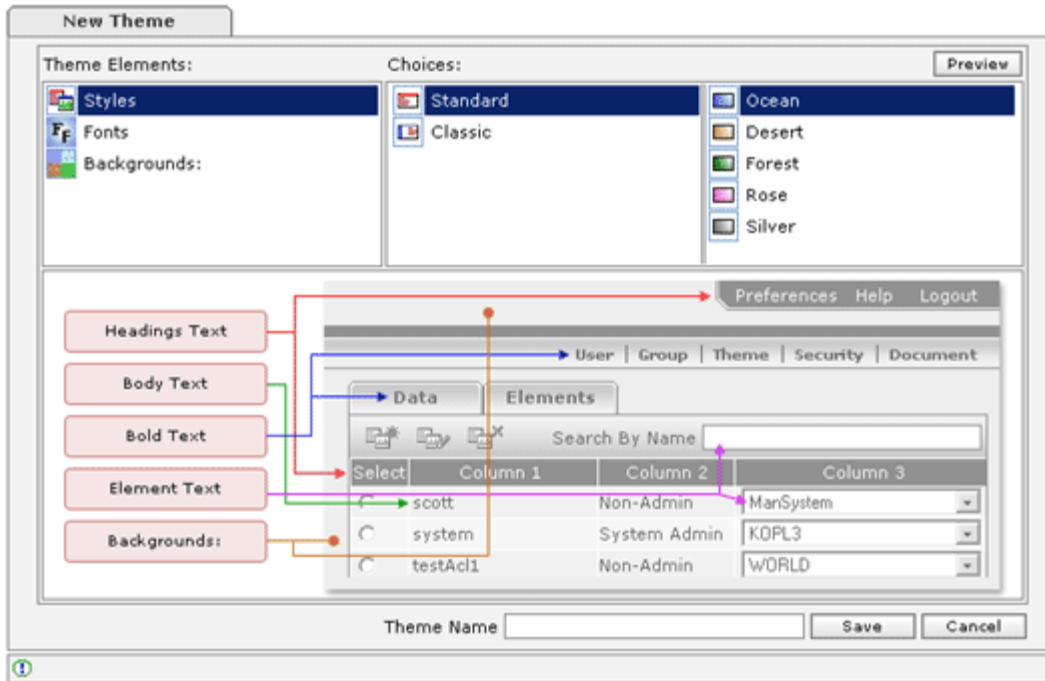
10.4 What is Theme List:

- Theme List is list of supplied and customizable Themes.

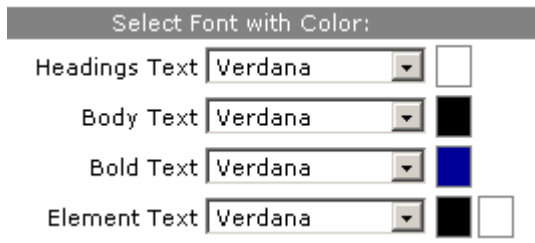


10.5 How to create a Theme:

- Click on 'New Theme' icon [] from the Theme List, New Theme Page appears with default settings.

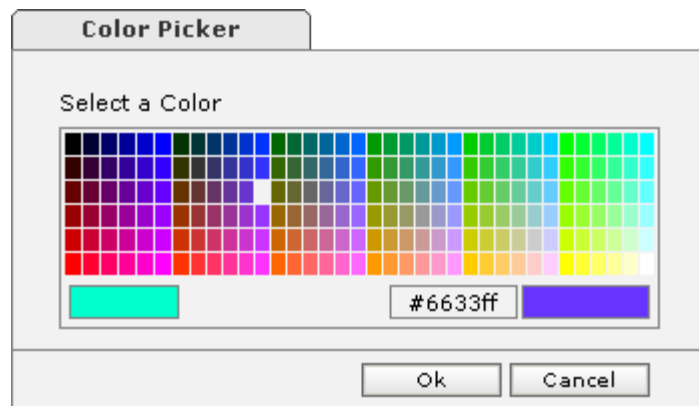


Select the **Theme Elements**.

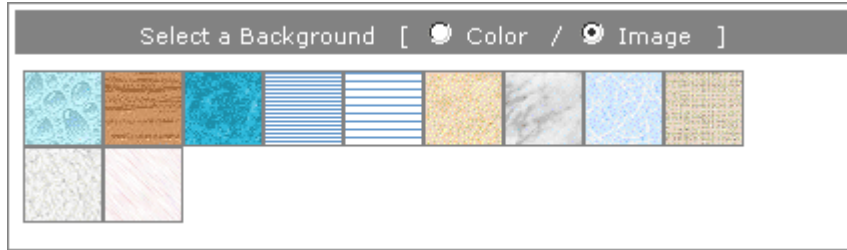


- Styles:** Choose a Style from the Choices box and corresponding ColorScheme for the selected Styles.
- Fonts:** Choose font from the corresponding combo and color for Heading Text, Body Text, Bold Text and Element Text.
- Backgrounds:** Choose either color or image from 'Select a Background' option.

- Color:** Choose the color which you would like to keep as background color from the color palette.




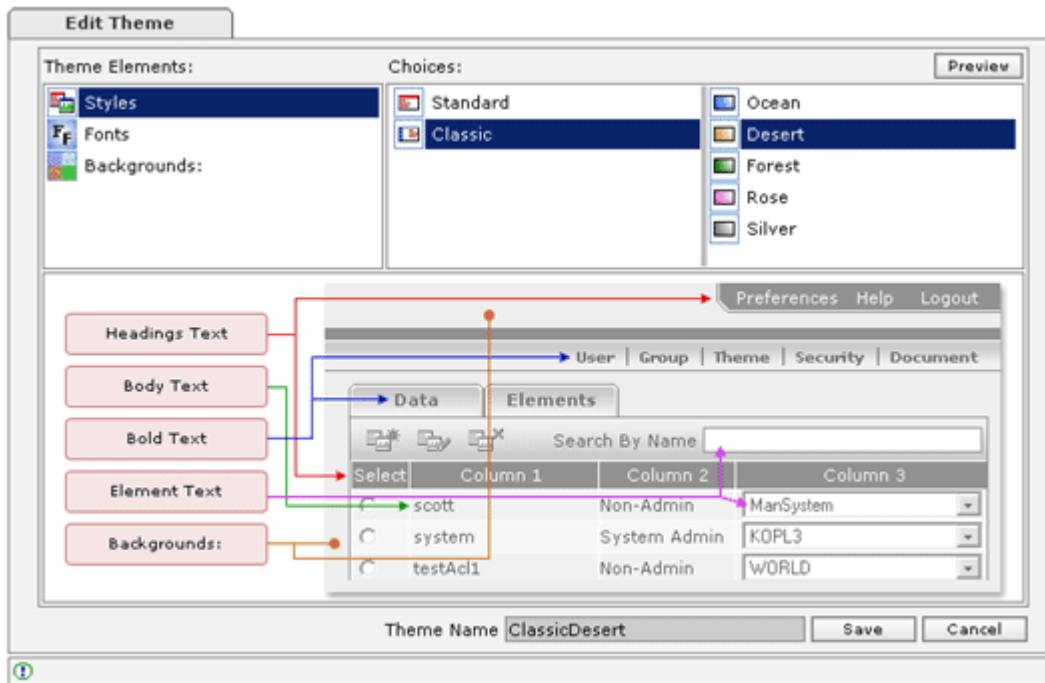
- **Image:** Choose the image which you would like to keep as background from the list of images.



- **Theme Name:** Enter a unique Theme Name, It is a mandatory field.
- Press 'Preview' to see the preview of the Theme.
- Press 'Save' to save the newly created Theme, the Theme will be saved and Theme list will appear with the message in the status Bar as "Theme 'StandardDesert' successfully saved".
- Press 'Cancel' to abort New Theme creation.

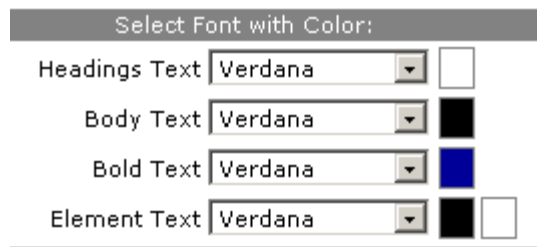
10.6 How to edit a Theme:

- Click on 'Edit Theme' icon [] from the Theme List, Edit Theme Page appears with previously saved data.

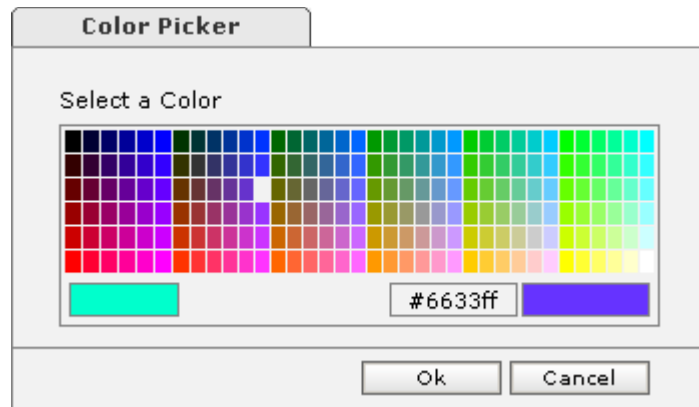


Now select the **Theme Elements**.

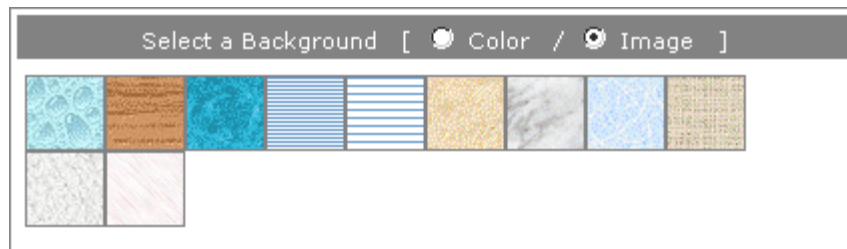
- **Styles:** Choose a Style from the Choices box and corresponding ColorScheme for the selected Styles.
- **Fonts:** Choose font from the corresponding combo and color for Heading Text, Body Text, Bold Text and Element Text.



- **Backgrounds:** Choose either color or image from 'Select a Background' option.
- **Color:** Pick the color which you would like to keep as background color from the color palette.




- **Image:** Choose the image which you would like to keep as background from the list of images.



- Press 'Preview' to see the preview of the Theme.
- Press 'Save' to save the modified Theme, the Theme will be saved and Theme list will appear with the message in the status Bar as "Theme 'StandardDesert' successfully saved".
- Press 'Cancel' to abort changes done on the Theme.

10.7 How to Delete a Theme:

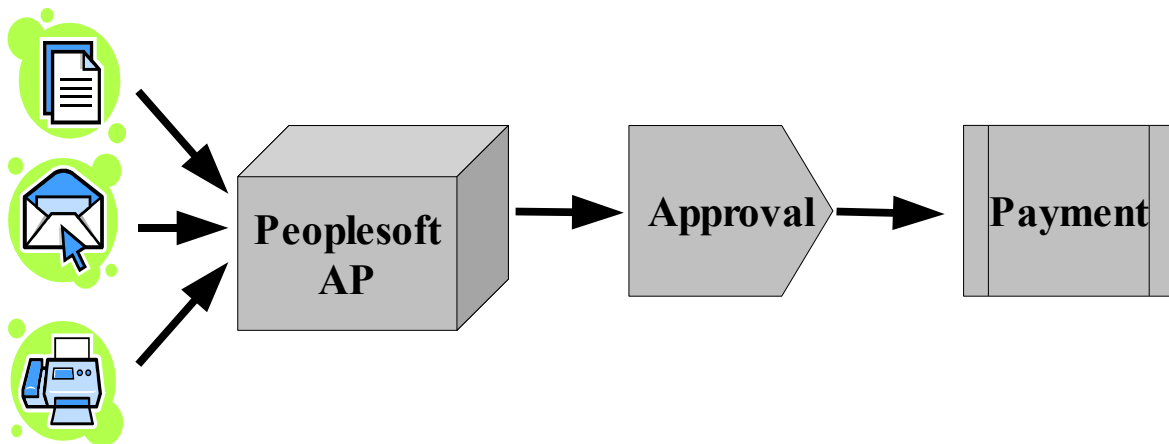
- Select a theme from the theme list, Click on 'Delete Theme' icon [], the theme will be deleted, then the theme list will get refreshed and will appear with the message in the status Bar as "Theme 'ClassicDesert' successfully deleted".

Appendix A: Using Peoplesoft Financials Adapter

A.1 Introduction:

Samhita, a comprehensive and user-friendly framework that can quickly and cost-effectively leverage your technology investments enhancing your existing business process by storing documents, vouchers and invoices, linking them to the appropriate records. Making information accessible with a single click from your existing software application enhancing work processes in areas such as accounts payable, procurement, customer service, compliance and many others.

Samhita comes with various adapters that make integration of samhita with other application easier. One of such adapter is Peoplesoft Financial adapter. This adapter can be used to automate some of the key business processes in the Peoplesoft Financials. One of such process is Accounts Payable invoice processing. **Samhita** allows you to streamline invoice processing by removing common paper-related bottlenecks. Samhita lets staff bind receipts and invoices electronically to their respective transactions in your accounts payable software and access those documents instantly from a central repository. A strong workflow ensures routing of items through the approval cycle more efficiently.

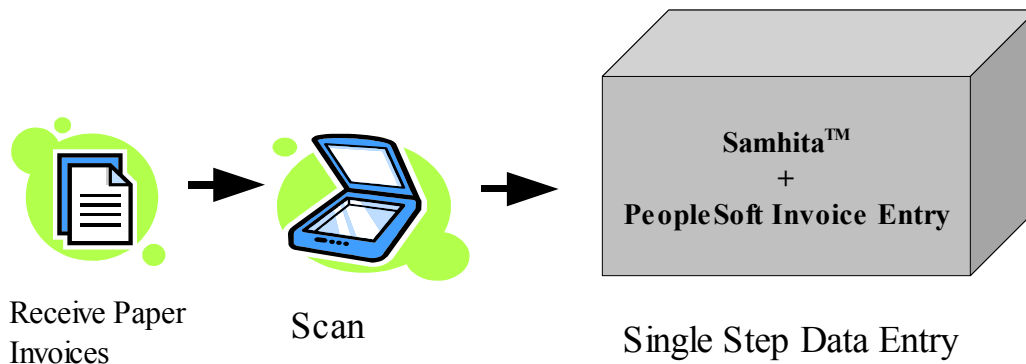


This streamlined invoice processing is achieved by following few steps. The first step is to import and capture invoice data. Paper invoices are in multiple forms and need to be transformed into images via scanning and then submitted to rigorous image preprocessing, or cleanup, to ensure that data is easily readable and accurate as it moves through the system.

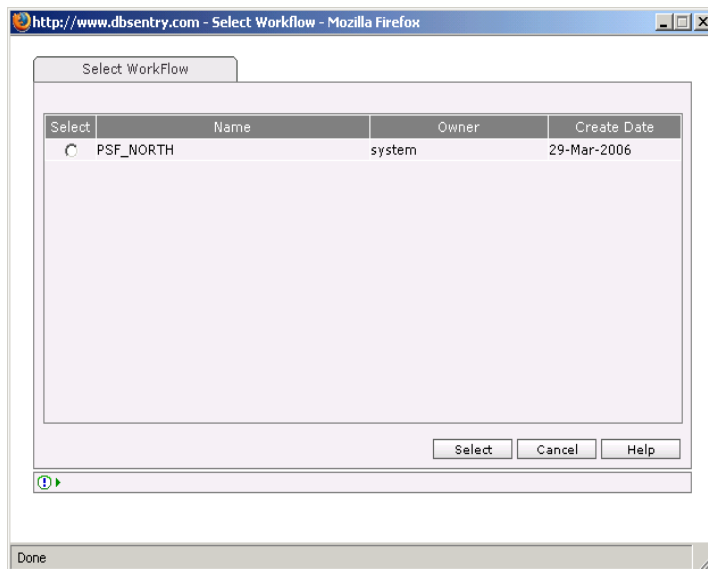
The invoice captured in the first step, then is store in Samhita system in a logical folder structure. At this point a link is generated to this stored invoice, which would allow one to access the invoice.

Link generated in the second step is incorporated in the Accounts Payable(AP) system. This would

enable a filing clerk or an auditor to access the physical invoice by clicking on the link.



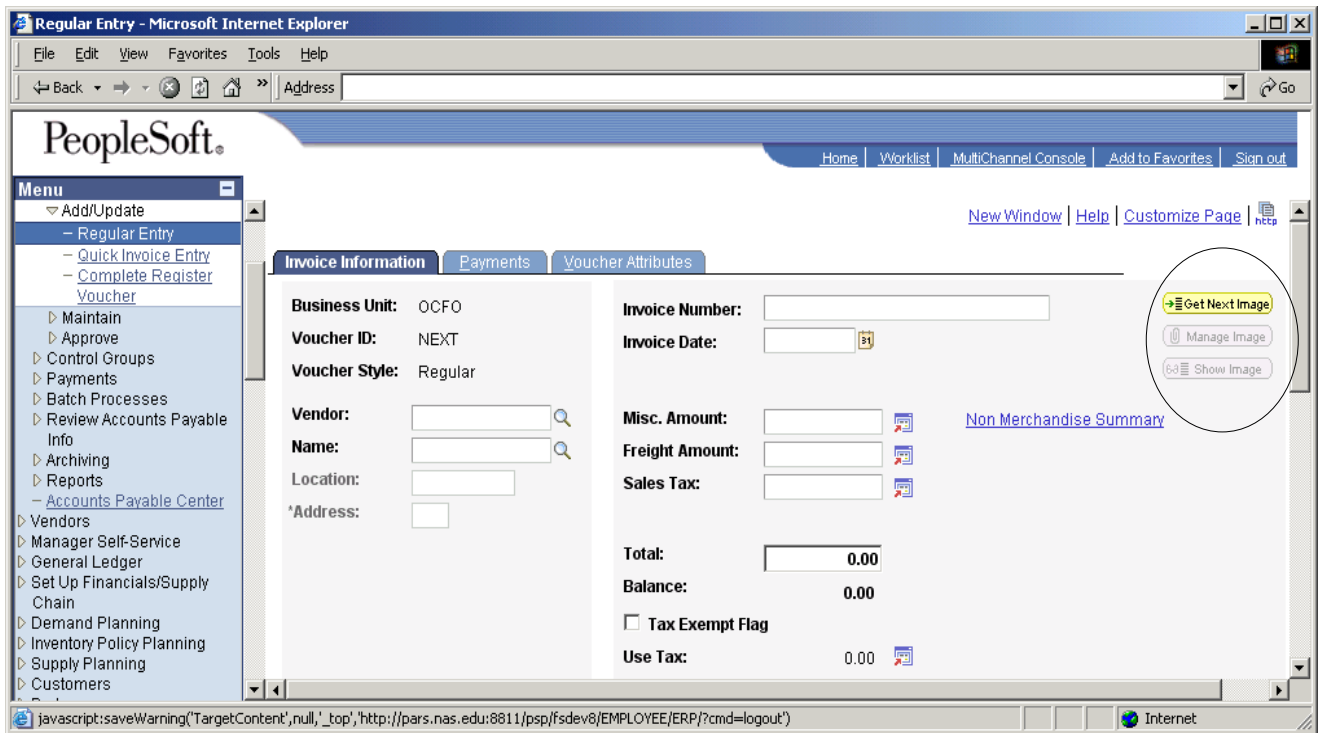
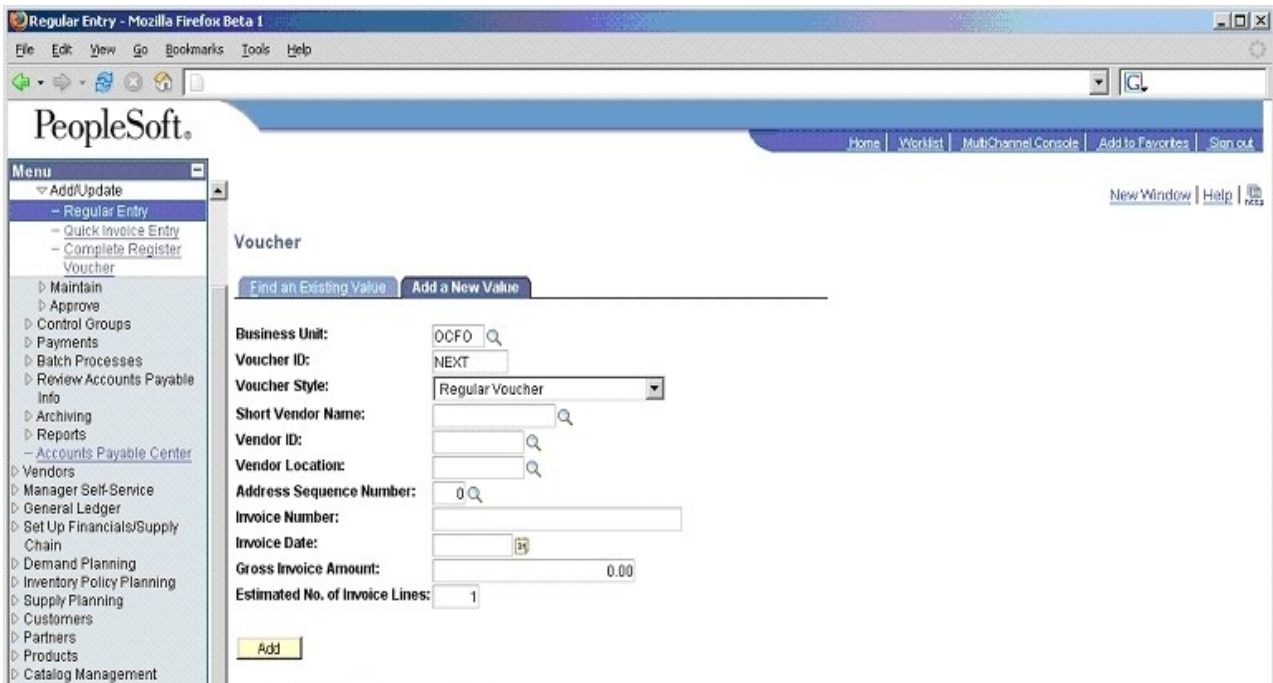
A.2 How to submit vouchers to the workflow:



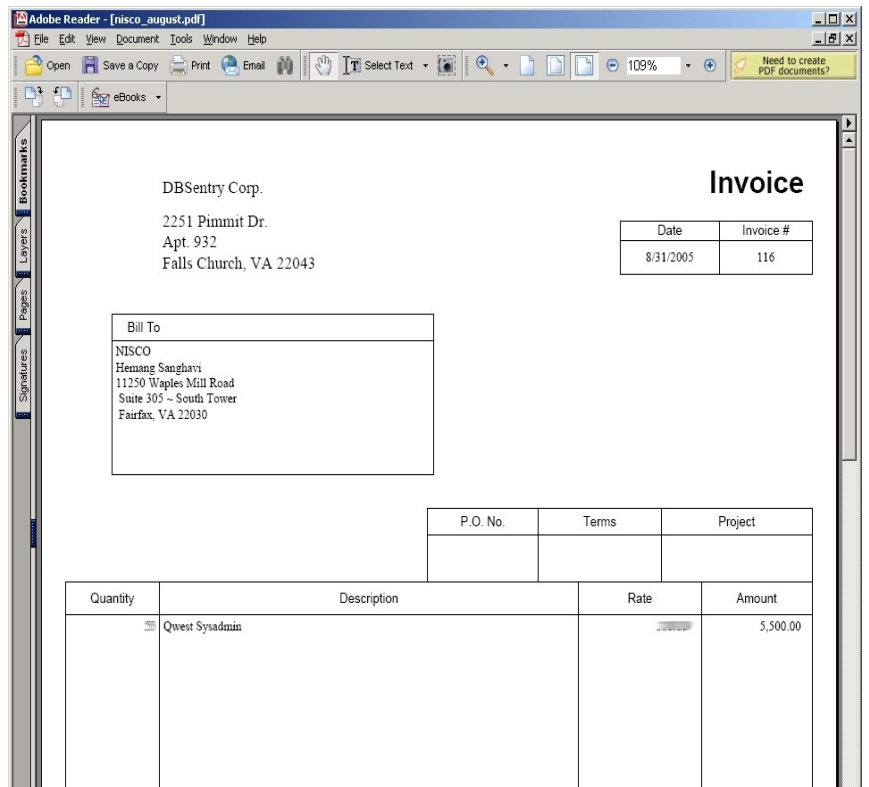
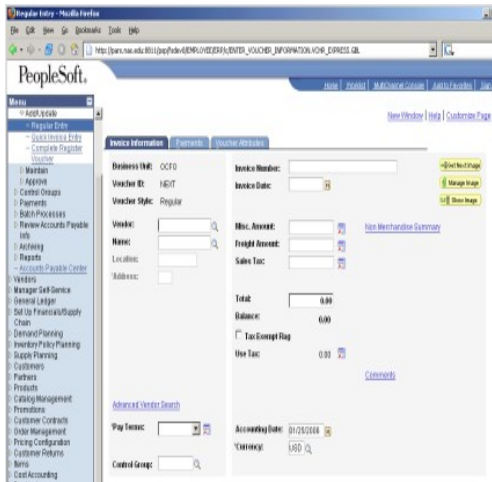
- Make sure you have requisite privileges to submit documents to workflow.
- Scan all the invoices received as paper.
- Upload all the images to Samhita into a folder.
- Select the folder into which all the images are uploaded
- Click on Submit Workflow icon
- Select the appropriate workflow based on a queue
- Click on OK

A.3 How to enter vouchers in the Peoplesoft:

- Make sure you have web browser pop-up blocker disabled for samhita website.
- Login into Peoplesoft
- Navigate to Voucher Data entry screen
- Create a new voucher (Follow the illustrations)



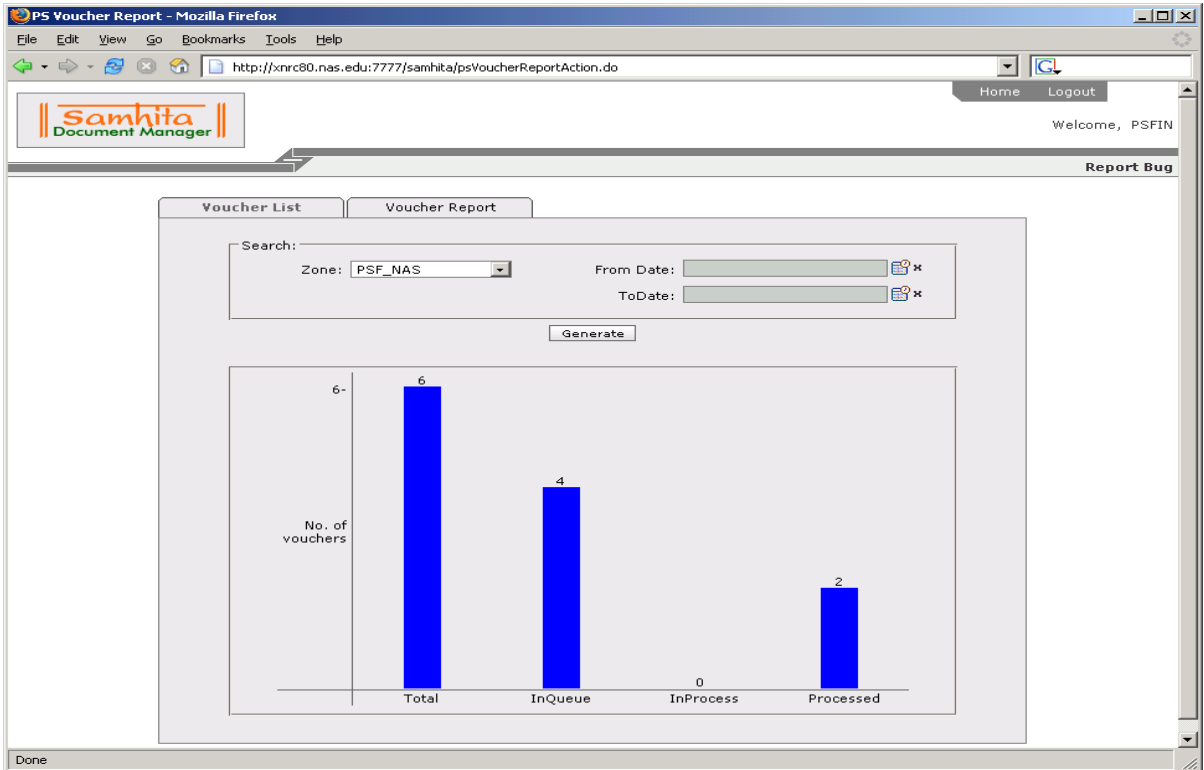
- Click on “Get Next Image” button



- A new image should open in a separate window
- Perform data entry by looking at the image
- Save the voucher
- The Voucher image is permanently tied to the recently created voucher in Peoplesoft, which can be viewed by clicking on the “Show Image” button.

A.3 How to monitor voucher queues:

- To be able to perform this operation you should have queue management rights
- Login into Samhita
- Click on Adapters
- Click on Peoplesoft Financials adapter
- Select the Voucher Reports tab.
- Select the Zone (queue) for which you want the report for.



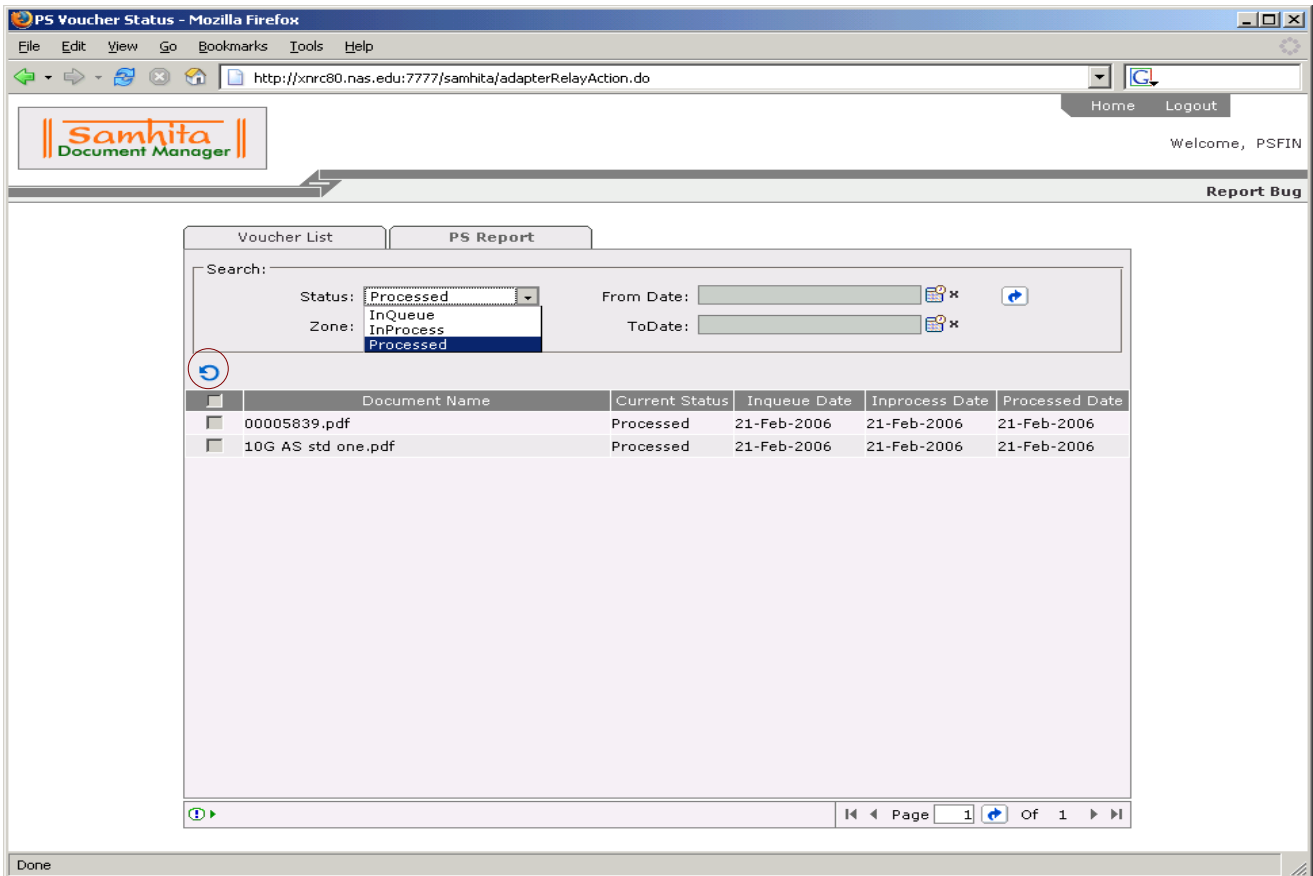
- Click on the Generate button
- You should be presented with a screen showing a bar chart showing the status of the whole voucher process.

A.4 How to administer voucher queue:

Some times you need to reset the voucher status from “in-process” to “in-queue” again. This situation arises when AP data entry personnel clicks on “Get next image” button in peoplesoft, but does not perform the data entry leaving the voucher status to “in-process”

- To be able to perform this operation you should have queue management rights
- Login into Samhita
- Click on Adapters

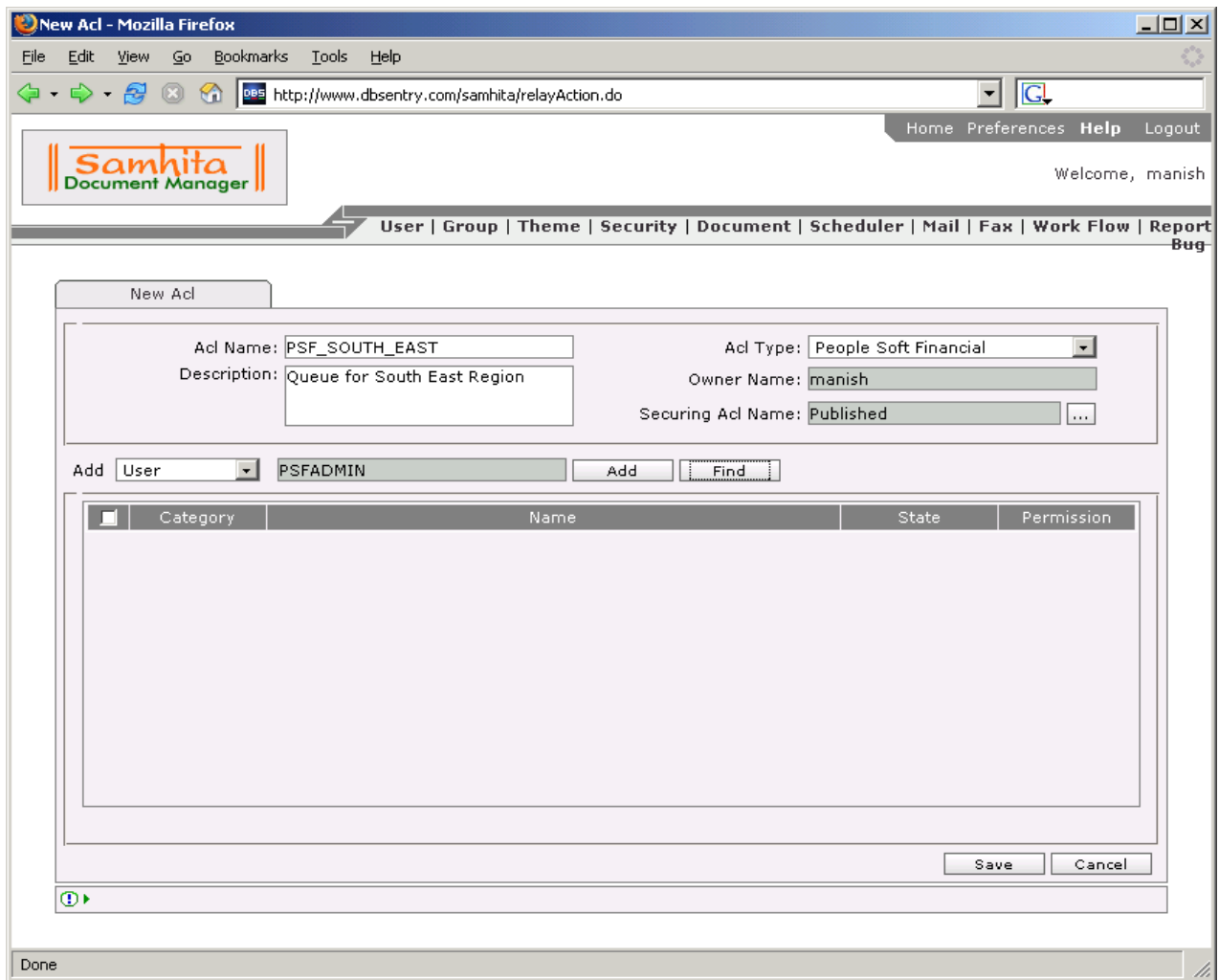
- Click on Peoplesoft Financials adapter
- Select appropriate queue (zone)
- Select vouchers you want to reset



- Click on reset icon to reset selected vouchers

A.5 How to create new queue:

- In order to be able to perform this operation you must have system administration privileges.
- Login to the Samhita as system administrator.
- Click on Security icon
- Click on create new ACL



- Create a new ACL with a new name, with ACL Type as “Peoplesoft Financial”.
- Add users who will be the queue managers in the ACL
- Click on the Save button.