

# OMNIDOCs 9.1

## eGOV ADMIN MANUAL



**Newgen Software Technologies Ltd**

A-6, Satsang Vihar Marg, Qutab Institutional Area

New Delhi - 110067, INDIA

Tel: 91-11-40770100, 26964733, 26963571

Fax: +91-11-26856936

E-mail: [helpdesk@newgen.co.in](mailto:helpdesk@newgen.co.in)

**June - 2018**

# Disclaimer

This document contains information proprietary to Newgen Software Technologies Limited. You may not disclose or use any proprietary information or use any part of this document without written permission from Newgen Software Technologies Limited.

Newgen Software Technologies Limited makes no representations or warranties regarding any software or to the contents or use of this manual. It also specifically disclaims any express or implied warranties of merchantability, title, or fitness for any particular purpose. Even though Newgen Software Technologies Limited has tested the hardware and software and reviewed the documentation, it does not guarantee or imply that this document is error free or accurate regarding any particular specification. As a result, this product is sold as it is and you, the purchaser, are assuming the entire risk as to its quality and performance.

Further, Newgen Software Technologies Limited reserves the right to revise this publication and make changes in contents without any obligation to notify any person of such revisions or changes. Newgen Software Technologies Limited authorizes no Newgen agent, dealer or employee to make any modification, extension, or addition to the above statements.

Newgen Software Technologies Limited has attempted to supply trademark information about company names, products, and services mentioned in this document. Trademarks indicated below were derived from various sources.

**Copyright © 2017 by Newgen Software Technologies Ltd.**

All Rights Reserved. No part of this publication may be reproduced and distributed without the prior permission of:

Newgen Software Technologies Limited,

A-6, SATSANG VIHAR MARG, QUTAB INSTITUTIONAL AREA,

New Delhi - 110067

INDIA

Printed in INDIA

# TABLE OF CONTENTS

## Contents

Disclaimer.....	2
TABLE OF CONTENTS .....	3
1 Introduction .....	5
1.1 Document Objective .....	5
1.2 Target Audience .....	5
2 Getting Started .....	6
3 Working with Users .....	8
3.1 User Creation.....	8
3.2 Assigning Properties to a User .....	11
3.3 Assigning Groups to a User .....	13
3.4 Assigning Privileges to a User .....	14
3.5 Deleting a User.....	17
4 Group Creation .....	20
4.1 Creating a Group .....	20
4.2 Assigning Properties to a Group .....	23
4.3 Assigning Users to a Group .....	24
4.4 Assigning Users to a Dispatch Group .....	25
4.5 Assigning Privileges to the Group.....	26
4.6 Assigning Roles to Users of a Group .....	27
5 Forgot Password and User Account Unlock.....	28
5.1 Forgot Password.....	28
5.2 User Account Unlock .....	29
6 Create & Modify Rules.....	31
6.1 Create Rule .....	31

6.2	Modify Rule .....	33
7	Transfer & Delegation (Additional Charge) .....	36
7.1	Providing Delegation Rights .....	36
7.2	Revoking Delegation Rights .....	38
8	Custom Group Creation/deletion (For Bulk communication) .....	42
8.1	Creating a Customized Group .....	42
9	Office Template Creation/Modification with Office Address in English & Hindi .....	46
10	Creation of Section in an Office .....	48
11	Creation of Designation in an Office .....	51
12	Creation of Office .....	53
13	Creation of File Mark / File Head .....	56
14	Update User .....	59
15	Installing Krutidev font (For Hindi Writing) .....	60
16	Knowledge Management .....	61

# 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 enterprise documents. It provides access to enterprise documents directly and through integration with business applications.

It also provides centralized repository for enterprise documents and supports rights-based archival. Manage complete lifecycle of documents through record retention, storage and retrieval policies. Supports exhaustive document and folder searches on date, indexes and general parameters as well as full text search on image and electronic documents

The very 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". Furthermore, this DMS can be accessed from any part of the world through the web application known as the OmniDocs Web.

## 1.1 Document Objective

The objective of this document is to provide important configuration details of the module, to enable the application system administrator(s) / authorized users in maintaining the system. It is also recommended that this document be a controlled copy in the hands of the target audience.

Neither this documentation nor any part of it may be copied or reproduced in any form or by any means or translated into another language, without the prior consent.

## 1.2 Target Audience

The document is intended for the application system administrators, who will be maintaining the Project system. It may be noted that the document is consistent with the system settings on the date of document. It is the responsibility of the application system administrators to keep this document updated and consistent with any further configuration done. All suggestions, comments, and ideas for improvement of the product is appreciated and invited from you to make later versions of the products more efficient and reliable for use.

## 2 Getting Started

To login into OmniDocs Admin:

1. Open the login url. Below screen will appear.

Enterprise Document Management (EDM) platform for creating, capturing, managing, delivering, and archiving large volumes of documents and content. OmniDocs seamlessly integrates with other enterprise applications and enables the applications to manage unstructured content. OmniDocs handles Scanned Document Images, Electronic Documents, Emails and Electronic Data Output from other Applications with equal efficiency and ease. OmniDocs facilitates collaborative working of users across and beyond the enterprise boundaries, and provides comprehensive tracking and monitoring of documents. Highly scalable architecture of OmniDocs provides a flexible environment to match the increasing demand of the business.

Key Features of OmniDocs:

- Unified repository for all documents and folders across the organization including electronic files, paper images and physical documents.
- Supports Users, Groups and Assign Rights, Privileges to work with folders and documents.
- Supports user to user document routing and provides provision for tracking of documents, within or across workgroup.
- Security through support for Https, Server Replication, and strong configurable Password policy.
- Provides Dataclasses, Global Indexes and Keywords to file & index Documents for quick retrieval of Documents.
- Configuring system for new usage by configuring indexes, classification hierarchies, access permission, user-groups, user screen, desktop settings, searches, tools for document and folder filing and reports
- Provides enterprise-class security with powerful and configurable policies for password, access controls and integration with LDAP & Identity Management solutions

User Name

Password

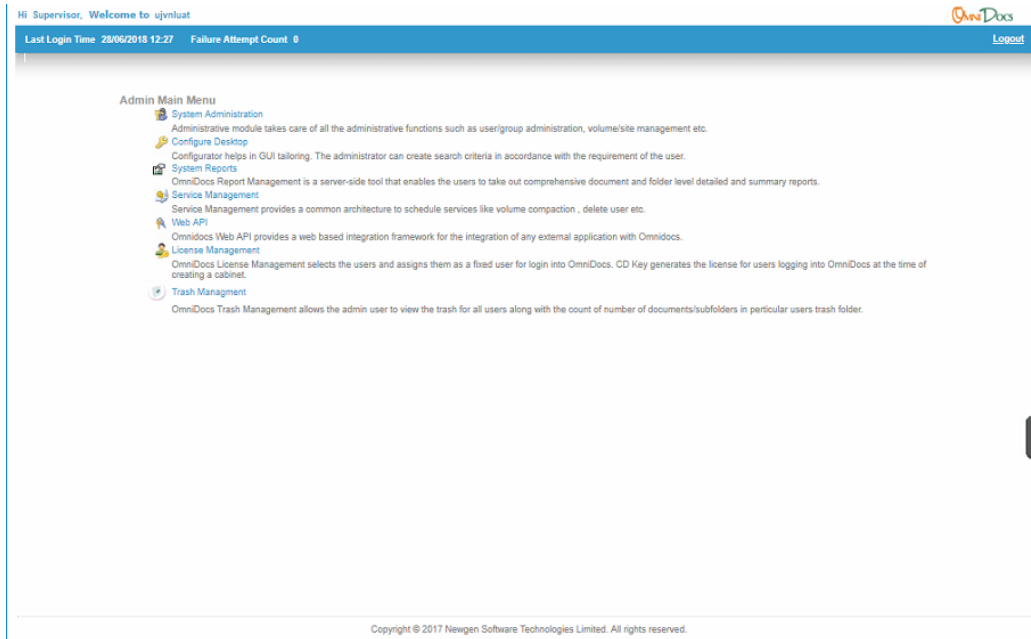
Cabinet

☐ Remember User Name and Cabinet

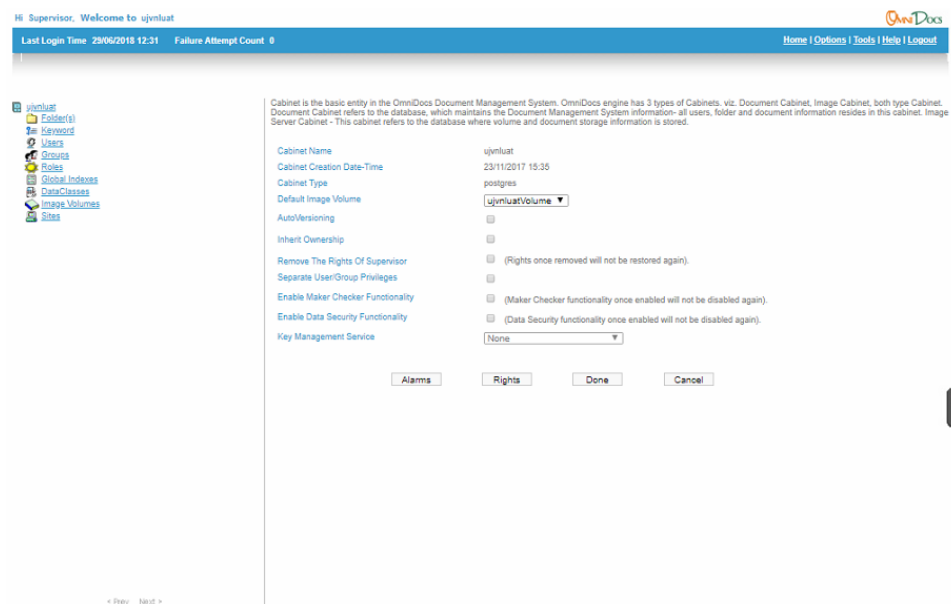
[Export Password](#)

Best view on resolution of 1366x768. Supported Browsers - IE 11 (With Compatibility View Disabled), Mozilla Firefox 50 and above, Chrome 53 and above and Safari 10.1.  
Copyright © 2017 Newgen Software Technologies Limited. All rights reserved.

## 2. Enter the login user id, password and the Cabinet. Click Login.



## 3. Click on System Administration link. Below screen appears.



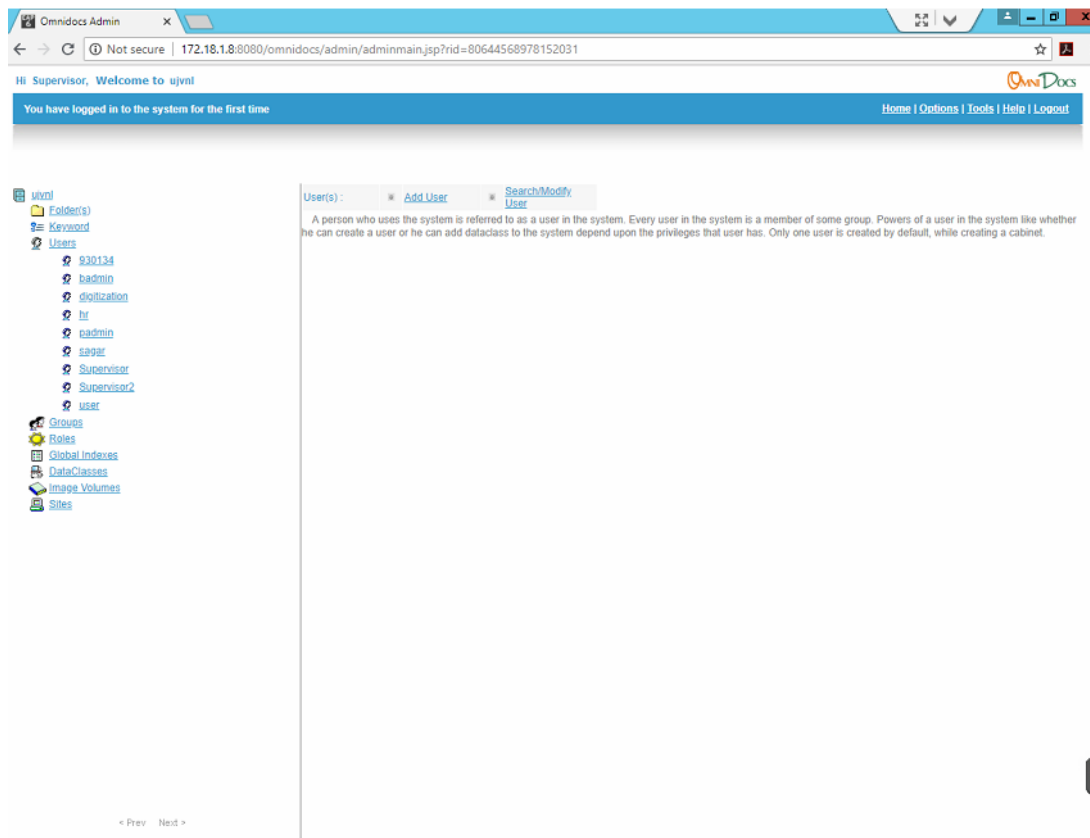
## 3 Working with Users

This chapter includes creating a New User, Assigning Properties to a user, Assigning Groups to a user, Assigning Privileges to a user and Deleting a user.

### 3.1 User Creation

To create a new user:

1. Click the **Users** button on the right pane of the Folder Information screen.
2. This User Information screen appears with the **Add User** link.
3. This screen appears with the **Search/Modify User** link.





- Click the **Add User** link. The Add User screen appears.

Omnidocs Admin - Google Chrome

Not secure | 172.18.1.8:8080/omnidocs/admin/users/addUserMain...

Omnidocs Help

### Add User

• User Name   
 Domain User ☐  
 Generate Password ☐  
 • Password   
 • Confirm Password

User License Type Normal ▼

☐ Password Never Expires  
☒ Password Expire in  Day(s)

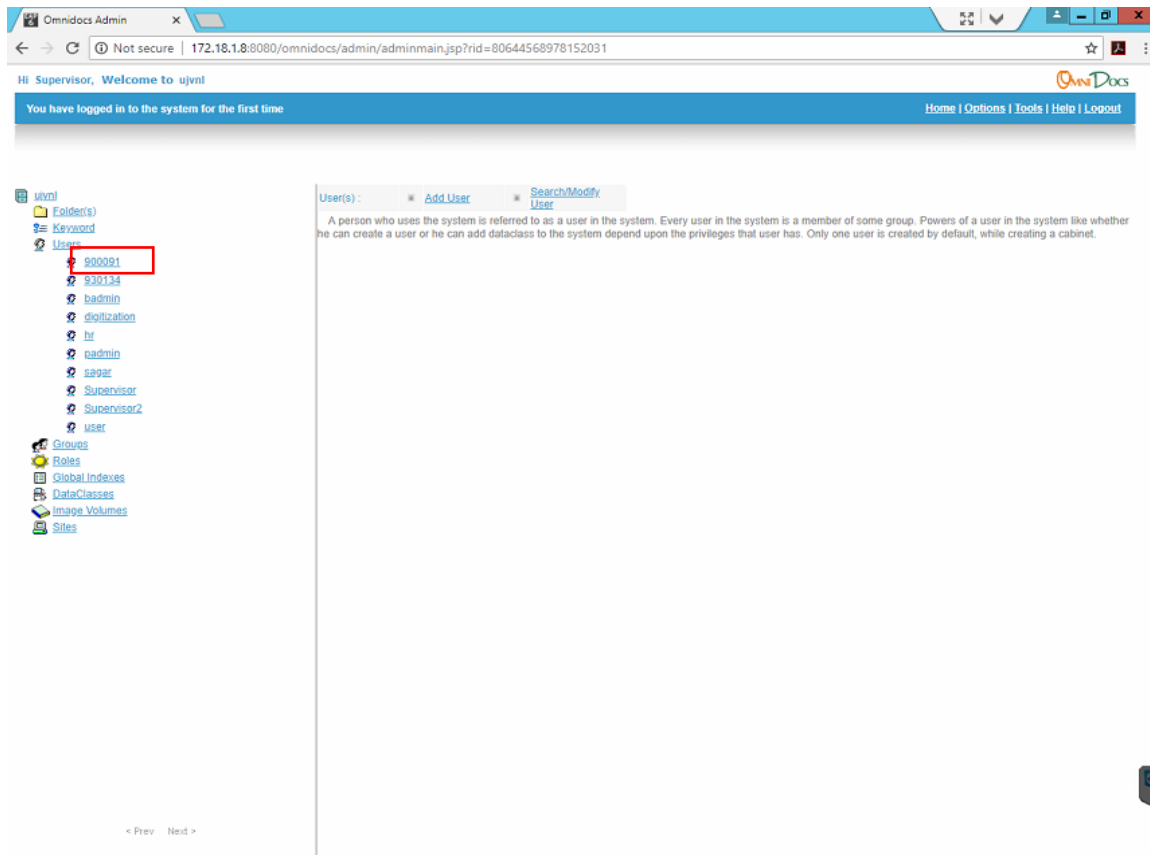
[Advanced](#)

Add Cancel

5. Type the data in the textboxes shown in the figure as required.

The screenshot displays the 'Add User' form in the Omnidocs Admin interface. The browser address bar shows the URL '172.18.1.8:8080/omnidocs/admin/adminmain.jsp?rid=80644568978152031'. The page title is 'Omnidocs Admin - Google Chrome'. The form includes fields for User Name (900091), Domain User, Password, Confirm Password, User License Type (Normal), Password Never Expires, Password Expire in (60 Day(s)), First Name (New User), Last Name, Email Id, Fax No, and User Account. The page also shows a sidebar with navigation links like Folders(s), Keyword, Users, Groups, Roles, Global Indexes, Data Classes, Image Volumes, and Sites.

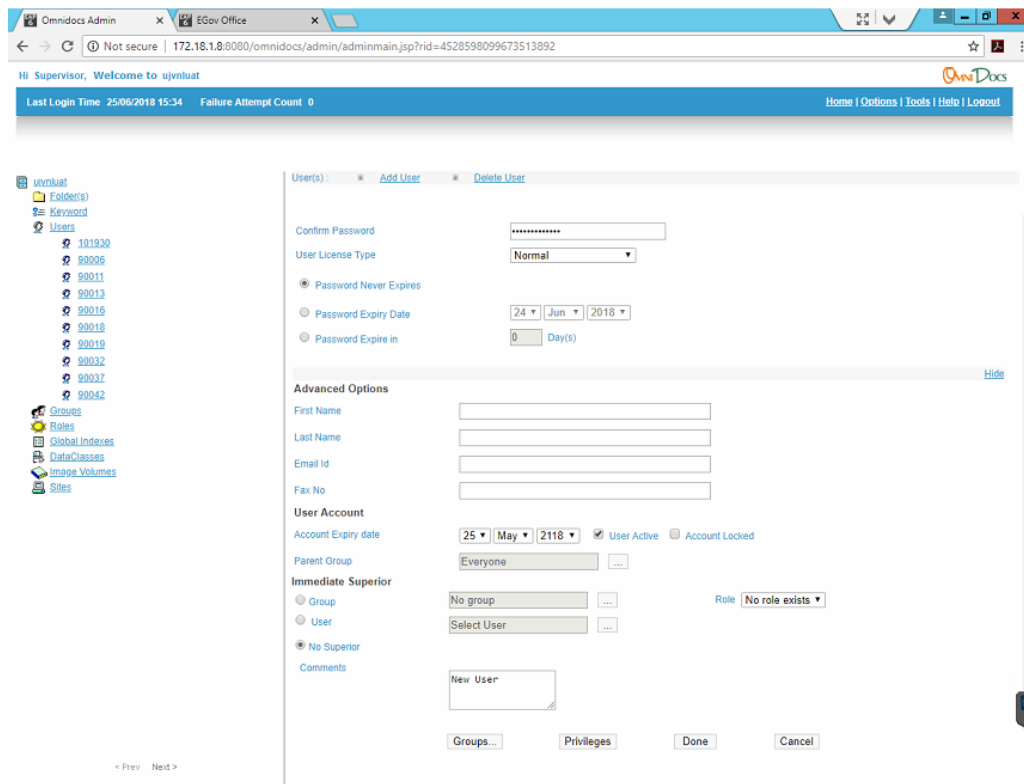
6. To create a user, click the **Add** button on the **Add User** screen.
7. The name of the new user is displayed on the list of Users on the left pane of the User Information screen.



## 3.2 Assigning Properties to a User

To assign or modify the properties for the new user:

1. Click the specific user from the Users list. This list is present on the left pane of User Information screen.
2. The properties of the User are shown on the Properties View on the right pane of the User Information screen. Click on Advanced button to assign and modify the properties.



3. Enter or Modify the user information in the textboxes as described below:
  - i. Type the first name and last name of the user in the **First Name** and **Last Name** textboxes respectively (Advanced properties).

---

**NOTE:** Input to the First Name and Last Name text fields is optional.

---

- ii. Type a password for the user in the **Password** textbox.

---

**NOTE:** Input to the Password text field is mandatory.

---

---

iii. Type the password again in the **Confirm Password** textbox to verify that the data typed in the **Password** and **Confirm Password** text fields are same.

iv. Type the e-mail address of the new user in the **E-mail ID** textbox.

---

**NOTE:** Input to the E-mail ID text field is optional.

---

v. Type the fax number of the new user in the **Fax Number** textbox.

---

**NOTE:** The Fax Number is optional.

---

vi. Specify an expiry date for the user, in the **Expiry Date** textbox.

vii. Select the **User Active** option for enabling the access rights assigned to the User.

---

**NOTE:** By default User Active option remains selected, you can clear the option to deny access to the User.

---

viii. Select the parent group from the **Parent Group** box.

ix. Select the **Immediate Superior**. This can be one of the following:-

- Role of a particular Group.
- Any User.
- No Superior option.

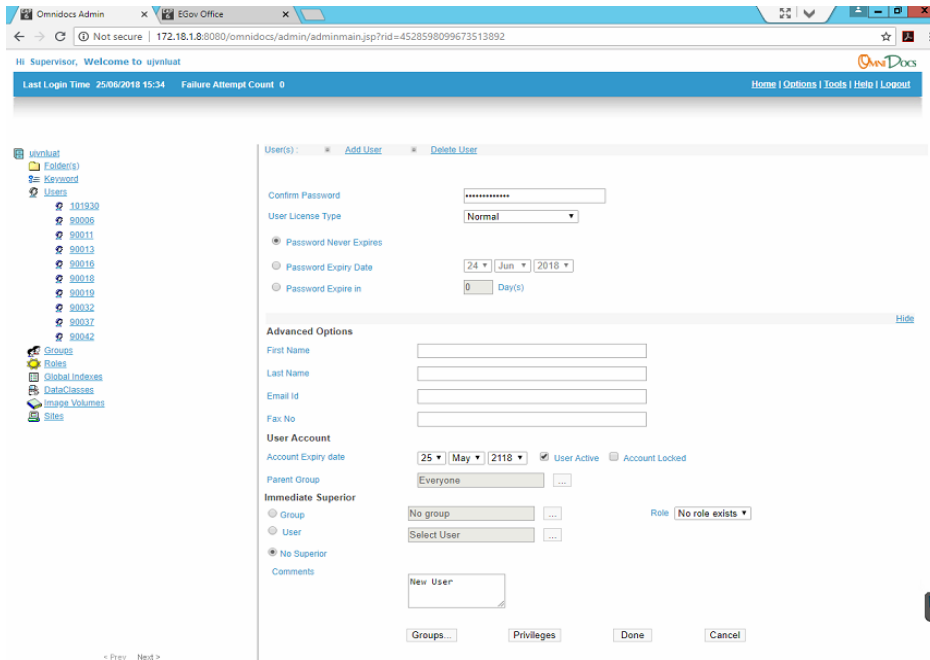
x. Type a relevant comment for the new user in the **Comments** textbox.

xi. Click the **Done** button to save the changes.

### 3.3 Assigning Groups to a User

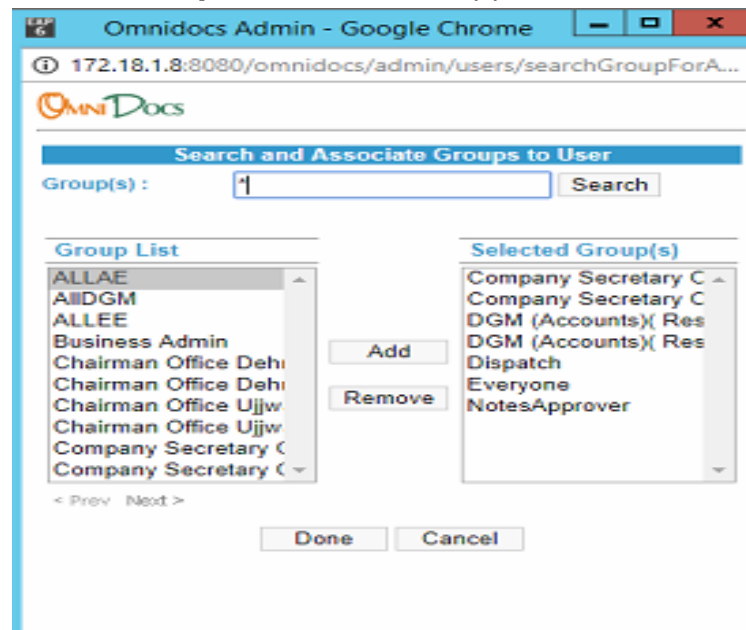
To assign a group to the new user:

1. Open the User Information screen.



The screenshot shows the 'Add User' form in the Omnidocs Admin interface. The form is divided into several sections: 'Confirm Password' with a password field and a 'Normal' license type dropdown; 'Advanced Options' with fields for First Name, Last Name, Email Id, and Fax No; 'User Account' with an account expiry date (25 May 2118), a 'User Active' checkbox, and a 'Parent Group' dropdown set to 'Everyone'; 'Immediate Superior' with a 'No group' dropdown and a 'Role' dropdown set to 'No role exists'; and a 'Comments' field with the text 'New User'. At the bottom, there are buttons for 'Groups...', 'Privileges', 'Done', and 'Cancel'.

2. Click the **Groups...** button on the **User Properties** view.
3. The **Search and Associate Groups to User** screen appears.



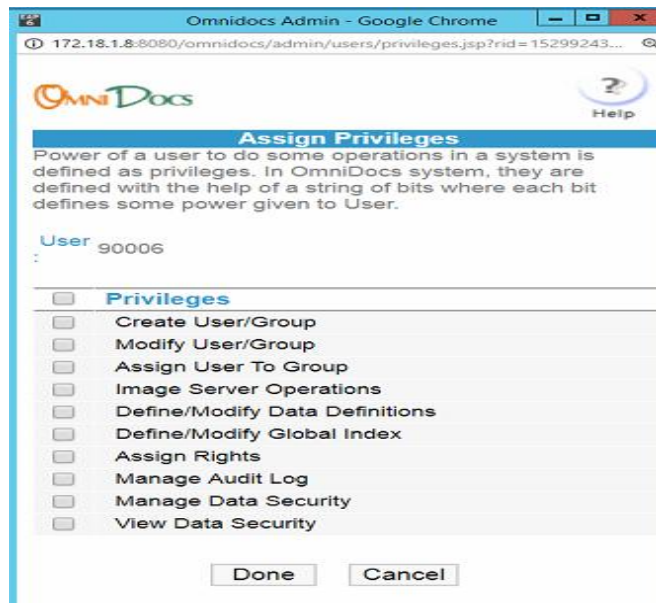
The screenshot shows the 'Search and Associate Groups to User' screen. It features a search bar with the text '1' and a 'Search' button. Below the search bar, there are two lists: 'Group List' and 'Selected Group(s)'. The 'Group List' contains various groups including ALLAE, ALLDGM, ALLEE, Business Admin, Chairman Office Dehu, Chairman Office Ujjw, Chairman Office Ujjw, Company Secretary C, and Company Secretary C. The 'Selected Group(s)' list contains Company Secretary C, Company Secretary C, DGM (Accounts)( Res, DGM (Accounts)( Res, Dispatch, Everyone, and NotesApprover. There are 'Add' and 'Remove' buttons between the two lists. At the bottom, there are 'Done' and 'Cancel' buttons.

4. To assign a group to the user:
  - Select a group from the Other **Group List** box.
  - Click the **Add** button.
5. To remove the user from a group:
  - Select the group from the **Group List** box.
  - Click the **Remove** button.
6. To save the changes made:
  - Click the **OK** button.
  - Else click the **Cancel** button to exit from the Associate Groups to User screen and return to the User Information screen.

## 3.4 Assigning Privileges to a User

To assign privileges to the new user:

1. Open the User Information screen.
2. Click the **Privileges...** button on the User Properties view of the User Information screen.
3. The **Assign Privileges** screen appears:



**NOTE:**

In case, **Data Security Functionality** checkbox is selected in the Home screen, following “**Assign Privileges**” screen with added privileges will appear.

---

4. There are 12 privileges that you can assign to a user:



5. To allow the user create a user or group:-
- Select the **Create User/Group** option.
6. To allow the user search and modify any other user:-
- Select the **Search/Modify** option.
7. To allow the user modify the properties of a user or group:-
- Select the **Modify User/Group** check box.
8. To allow the user assign another user to a group:-
- Select the **Assign User To Group** check box.
-

9. To allow the user perform image server operations:-
  - Select the **Image Server Operations** check box.
10. To allow the user create or modify a DataClass:-
  - Select the **Define/Modify Data Definitions** check box.
11. To allow the user create or modify the global indexes:-
  - Select the **Define/Modify Global Index** check box.
12. To allow the user assign rights for any object
  - Select the **Assign Rights** check box.
13. To allow the user manage audit logs:-
  - Select the **Manage Audit Log** check box.
14. To allow user the privilege to manage the **Data Security** section.
  - Select the **Manage Data Security** check box.
15. To allow user the privilege to view the secured data.
  - Select the **View Data Security** check box.

---

**NOTE:**

Additional **View Secured Data** rights should be provided to the User, over Folder and Document, to make the confidential data visible to them.

---

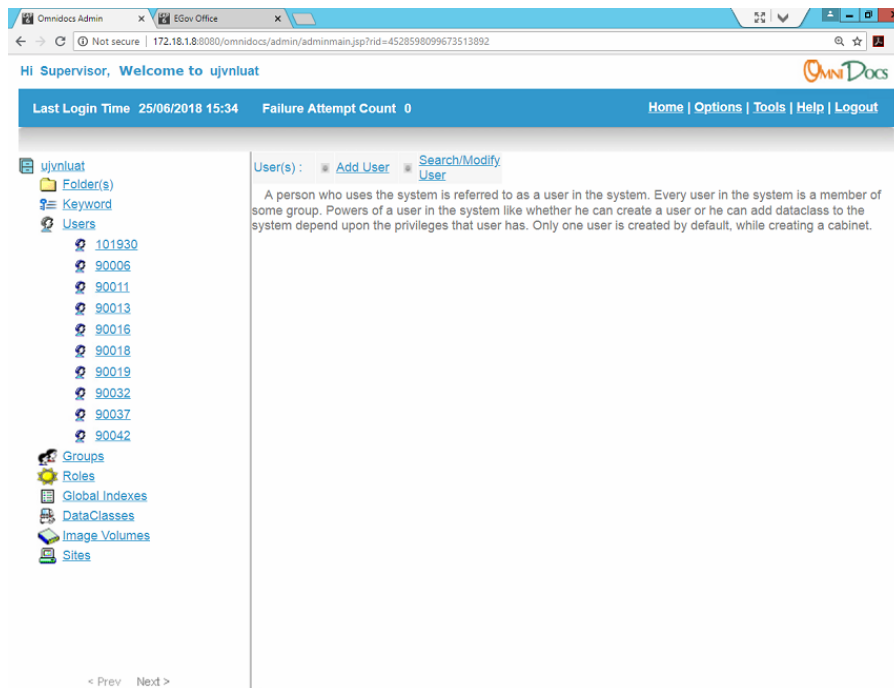
16. To implement the privileges you assign to the user, click the **OK** button.
17. Or, click the **Cancel** button to exit from the **Assign Privileges** screen at any stage without assigning privileges to the user.



## 3.5 Deleting a User

To delete a User:

1. Select the specific user from the Users list.
2. This User list is present on the left pane of User Information screen.



3. User Information Screen appears.
4. The properties of the selected user are shown on the Properties View on the right pane of the User Information screen.

OmniDocs Admin x EGov Office x

Not secure | 172.18.1.8:8080/omnidocs/admin/adminmain.jsp?rid=4528598099673513892

Hi Supervisor, Welcome to ujnvluat

Last Login Time 25/06/2018 15:34 Failure Attempt Count 0 Home | Options | Tools | Help | Logout

ujnvluat

- Folder(s)
- Keyword
- Users
  - 101930
  - 90006
  - 90011
  - 90013
  - 90016
  - 90018
  - 90019
  - 90032
  - 90037
  - 90042
- Groups
- Roles
- Global Indexes
- DataClasses
- Image Volumes
- Sites

User(s): [Add User](#) [Delete User](#)

A person who uses the system is referred to as a user in the system. Every user in the system is a member of some group. Powers of a user in the system like whether he can create a user or he can add dataclass to the system depend upon the privileges that user has. Only one user is created by default, while creating a cabinet.

User Name: 90006

Domain User: ☐

Password:

Confirm Password:

User License Type: Normal

☒ Password Never Expires

☐ Password Expiry Date: 23 Mar 2018

☐ Password Expire in: -93 Day(s)

[Advanced](#)

< Prev Next >

[Groups...](#) [Privileges](#) [Done](#) [Cancel](#)

- Click on **Delete User** link.
- Transfer OwnerShip screen will appear.

Users... : 90006 - Google Chrome

172.18.1.8:8080/omnidocs/admin/role/deleteUserMain.jsp?UserIndex=20&UserName=90006&rid=1529924994000...

OmniDocs Help

### Delete User

Administrator can associate the Roles, Sub-ordinates, Documents and Folders of the User being deleted to the new User.

**Associate New User to Role:**

Group Name	Role Name
User: No User ...	

[Apply](#)

**Transfer Ownership of Documents and Folders:**

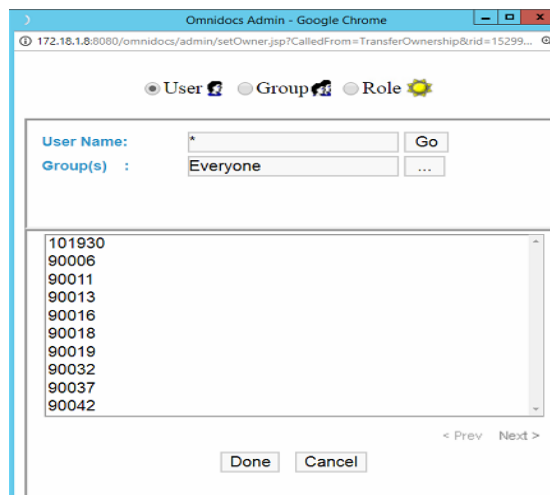
Owner: No User ...

**Re-Assign Subordinates:**

User
Superior User: No User ...

[Delete](#) [Cancel](#) [Apply](#)

7. In the Ownership section, click on the ellipsis button present in front of the Owner.
8. Following screen will appear.

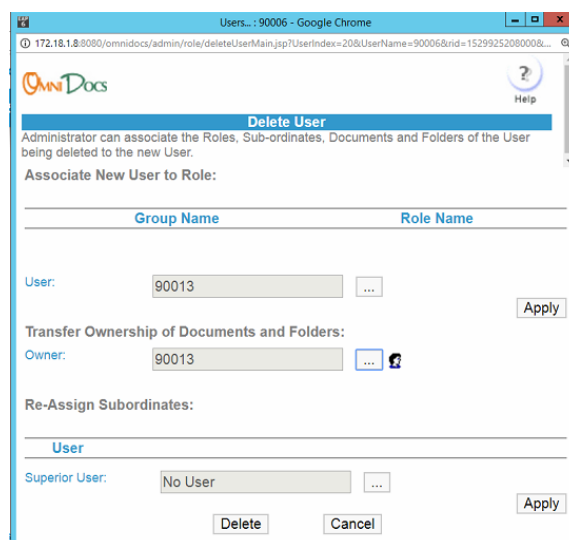


9. Select the new owner. Click on **Done** button.
10. Else click **Cancel** to close the dialog box without making any changes.
11. The changes made will be incorporated in the "Roles Assigned" dialog box.

---

**NOTE:** Here owner can be any existing user/ group or role.

---



12. Click on **Delete** button, to delete the user, else click **Cancel** to stop deletion.
13. User is now deleted and the transfer of ownership takes place.

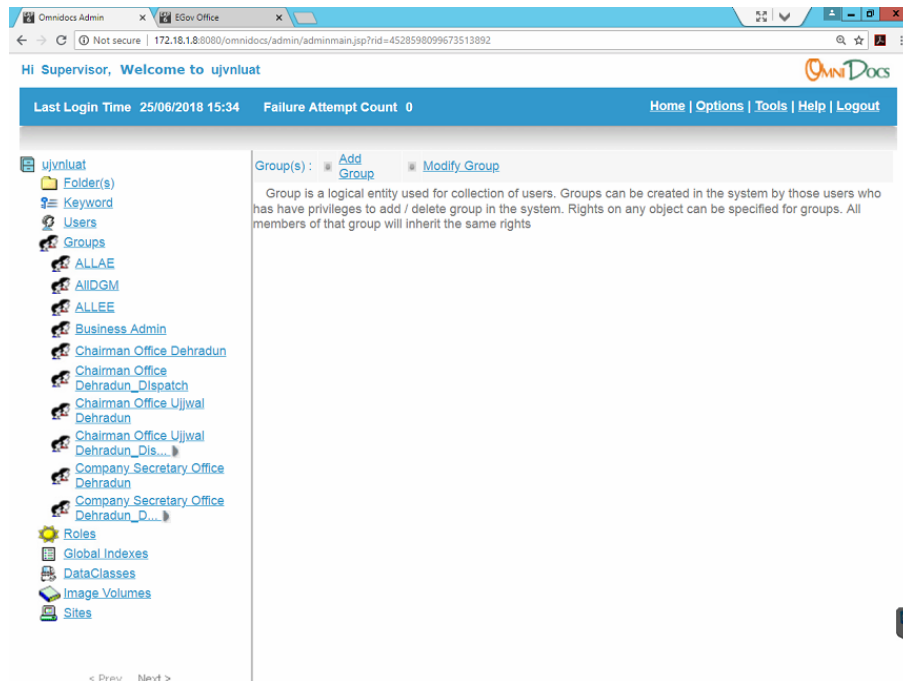
## 4 Group Creation

This chapter includes group functions such as Creating a group, Assigning Properties to a group, Assigning Users to a group, Assigning Privileges to a group and Assigning Roles to users of a group.

### 4.1 Creating a Group

To create a group:

1. Click the **Groups** link on the left pane of the Main screen.
2. The **Group Information screen** appears.
3. List of groups in batches is shown on the left pane and the description of group on the right pane.
4. You may click the Previous or the Next link on the left pane to see the preceding or subsequent batches of groups.



5. Click the **Add Group** link on the right pane of the Group Information screen.

6. The Add Group screen appears.

The screenshot shows the 'Add Group' screen in the Omnidocs Admin interface. The browser title is 'Omnidocs Admin - Google Chrome'. The URL is '172.18.1.8:8080/omnidocs/admin/groups/addGroup.jsp?rid=1529925623000&OD\_UID=4591260853744563633'. The page has a blue header with the 'Omnidocs' logo and a 'Help' link. Below the header, there is a section titled 'Add Group' with a description: 'Group is a logical entity used for collection of users. Groups can be created in the system by those users who has have privileges to add / delete group in the system. Rights on any object can be specified for groups. All members of that group will inherit the same rights'. The form contains the following fields: 'Group Name' (text input), 'Owner' (list box with 'Supervisor' selected), 'Parent Group' (list box), and 'Comments' (text area). At the bottom, there are five buttons: 'Groups...', 'Privileges', 'Roles...', 'Add', and 'Cancel'.

7. Type the name of the new group in the **Group Name** textbox.

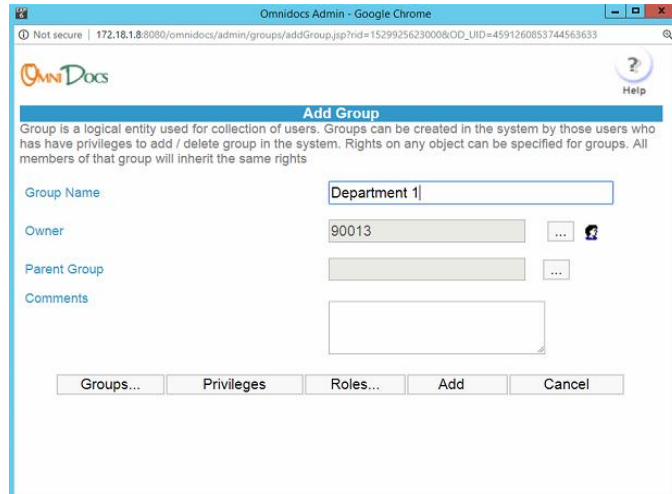
8. You may modify the Owner by selecting from the **Owner** list box.

9. To select Owner, click on Ellipsis button. Following screen will appear.

The screenshot shows the 'Set Owner' dialog box in the Omnidocs Admin interface. The browser title is 'Omnidocs Admin - Google Chrome'. The URL is '172.18.1.8:8080/omnidocs/admin/setOwner.jsp?CalledFrom=GroupProp&rid=1529925759000&OD\_UID=45...'. The dialog has three radio buttons at the top: 'User' (selected), 'Group', and 'Role'. Below the radio buttons, there are two rows of input fields: 'User Name:' with a text input and a 'Go' button, and 'Group(s) :' with a list box showing 'Everyone' and an ellipsis button. Below these fields is a large list box containing a scrollable list of IDs: 101930, 90006, 90011, 90013, 90016, 90018, 90019, 90032, 90037, and 90042. At the bottom right of the list box are '< Prev' and 'Next >' buttons. At the bottom of the dialog are 'Done' and 'Cancel' buttons. A status bar at the bottom left says 'Waiting for 172.18.1.8...'.

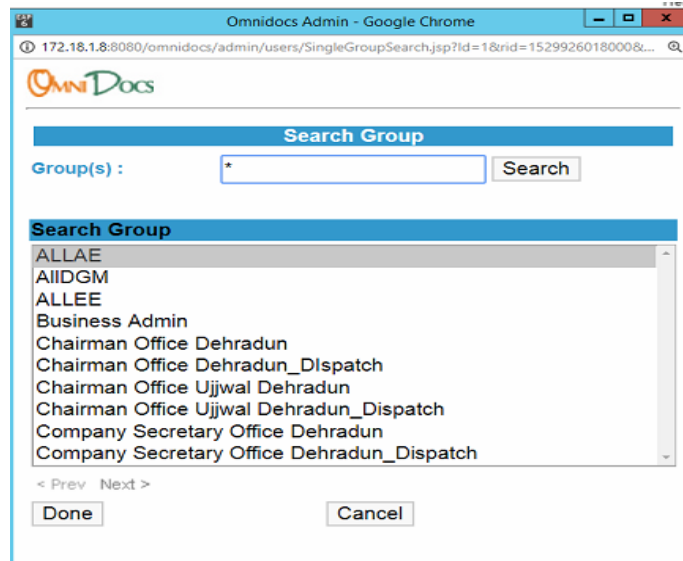
10. From this dialog box, assign ownership to the required **User/Group/Role**.

11. Once the ownership is assigned, click on **Done** button.
12. To close the Dialog Box, without making any changes, click on **Cancel** button.



The screenshot shows the 'Add Group' dialog box in the Omnidocs Admin interface. The dialog box has a title bar 'Omnidocs Admin - Google Chrome' and a URL bar showing '172.18.1.8:8080/omnidocs/admin/groups/addGroup.jsp?rid=1529925623000&OO\_UID=4591260853744563633'. The main content area has a blue header 'Add Group' and a description: 'Group is a logical entity used for collection of users. Groups can be created in the system by those users who has have privileges to add / delete group in the system. Rights on any object can be specified for groups. All members of that group will inherit the same rights'. Below the description are four input fields: 'Group Name' (containing 'Department 1'), 'Owner' (containing '90013'), 'Parent Group' (empty), and 'Comments' (empty). At the bottom are five buttons: 'Groups...', 'Privileges', 'Roles...', 'Add', and 'Cancel'.

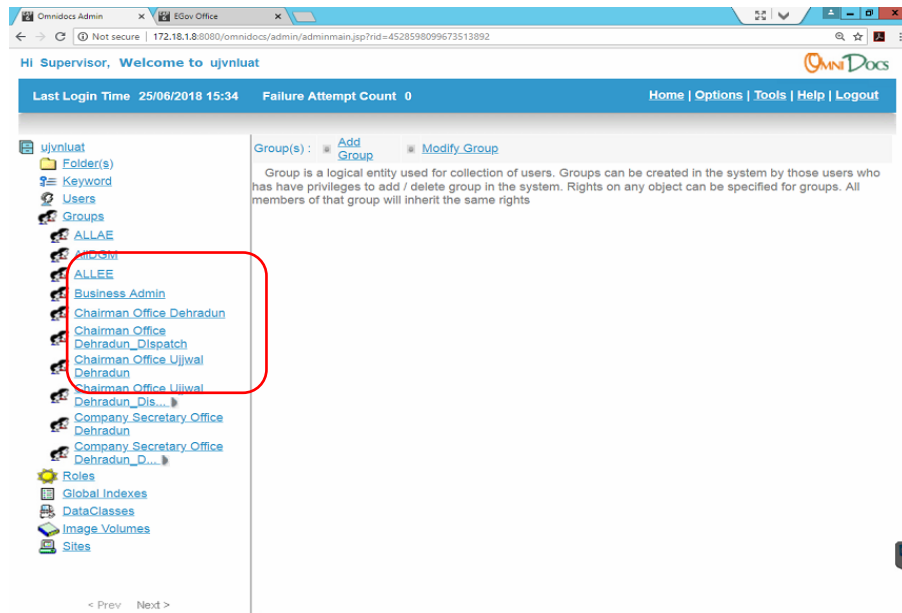
13. You may modify the Parent Group by selecting from the **Parent Group** list box.



The screenshot shows the 'Search Group' dialog box in the Omnidocs Admin interface. The dialog box has a title bar 'Omnidocs Admin - Google Chrome' and a URL bar showing '172.18.1.8:8080/omnidocs/admin/users/SingleGroupSearch.jsp?id=1&rid=1529926018000&...'. The main content area has a blue header 'Search Group' and a search bar with the label 'Group(s) :'. Below the search bar is a list of groups: 'ALLAE', 'AllDGM', 'ALLEE', 'Business Admin', 'Chairman Office Dehradun', 'Chairman Office Dehradun\_Dispatch', 'Chairman Office Ujjwal Dehradun', 'Chairman Office Ujjwal Dehradun\_Dispatch', 'Company Secretary Office Dehradun', and 'Company Secretary Office Dehradun\_Dispatch'. At the bottom are three buttons: '< Prev', 'Next >', and 'Cancel'.

14. Type a comment to be associated with the group in the **Comments** textbox.
15. Click the **Add** button to add the group to the list of Groups shown on the left pane of the Group Information screen and return to the Group Information screen.
16. Or, click the **Cancel** button to exit from the **Add Group** screen without saving the changes

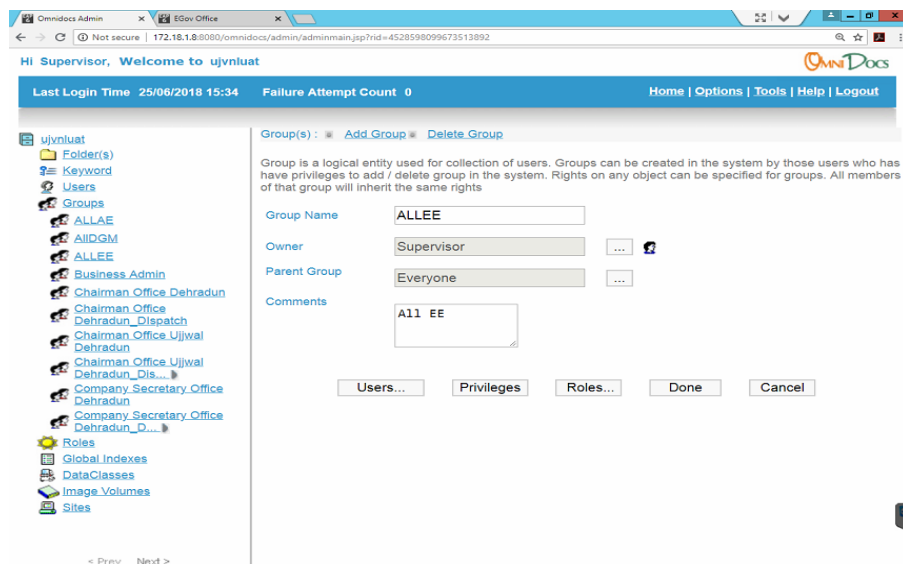
made.



## 4.2 Assigning Properties to a Group

To assign properties of a group:

1. Select a group from the **Groups** list on the left pane of the Group Information screen.
2. The properties of that group are shown on the Group Properties view on the right pane of the Group Information screen.



3. You may Modify the Group Properties information as described below:
  - i. Type a name for the group, in the **Group Name** textbox.
  - ii. Select the owner's name for the group, from the **Owner** combo box. By default, the login user is the owner of the group.
  - iii. Type a comment for the group, in the **Comments** textbox.
  - iv. To save the changes made to the properties information of the group, click the **Done** button on the Group Properties screen.
  - v. Or, click the **Cancel** button to retain the original information without saving the changes made at any stage.

## 4.3 Assigning Users to a Group

To assign users to the new group:

1. Open Group information screen.
2. Click **Users** button on **Group Properties** view on the right pane of the screen.
3. The **Associate Users to Group** screen appears:

The screenshot displays the 'Associate Users to Group : ALLEE' interface. It features a search bar for 'Username' with a 'Search' button. Below the search bar are two lists: 'Users List' and 'Associated User(s)'. The 'Users List' contains the following IDs: 101930, 90006, 90011, 90013, 90016, 90018, 90019, 90032, 90037, 90042. The 'Associated User(s)' list contains the following IDs: 90037, 91259, 91278, 92117, 92756, 92767, 92784, 92901, 92902, 92907. Between the lists are 'Associate' and 'Disassociate' buttons. At the bottom are '< Prev Next >' navigation links and a 'Close' button.

- **Associated User(s) List:** - It displays the list of users who are added to the group.
  - **Users List:** - It display the list of the users from which you add users to the selected group.
4. To add a user to the group:-

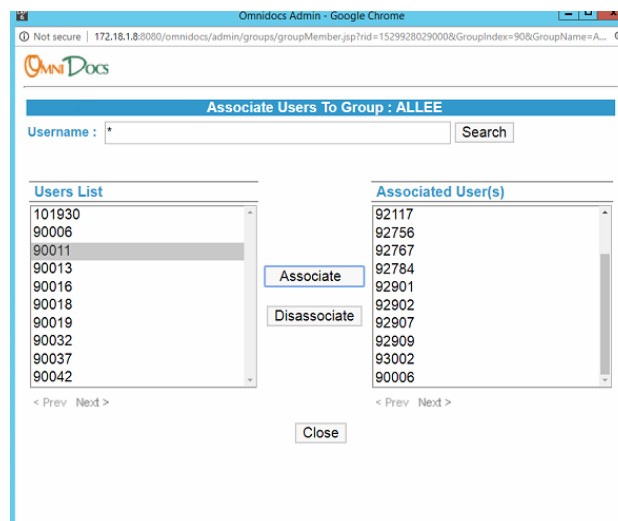


- Select that user from the **Users list**.
  - Click the **Associate** button.
5. To remove a user from the group:-
- Select the particular user from the **Associated User(s)** list.
  - Click the **Disassociate** button.
6. Click **Close** to return to the Group Information Screen.

## 4.4 Assigning Users to a Dispatch Group

To assign users to Dispatch group:

1. Go to **Dispatch** group and Open Group information screen.
2. Click **Users** button on **Group Properties** view on the right pane of the screen.
3. The **Associate Users to Group** screen appears:



- **Associated User(s) List:** - It displays the list of users who are added to the group.
  - **Users List:** - It display the list of the users from which you add users to the selected group.
4. To add a user to the group:-
- a. Select that user from the **Users list**.
  - b. Click the **Associate** button.

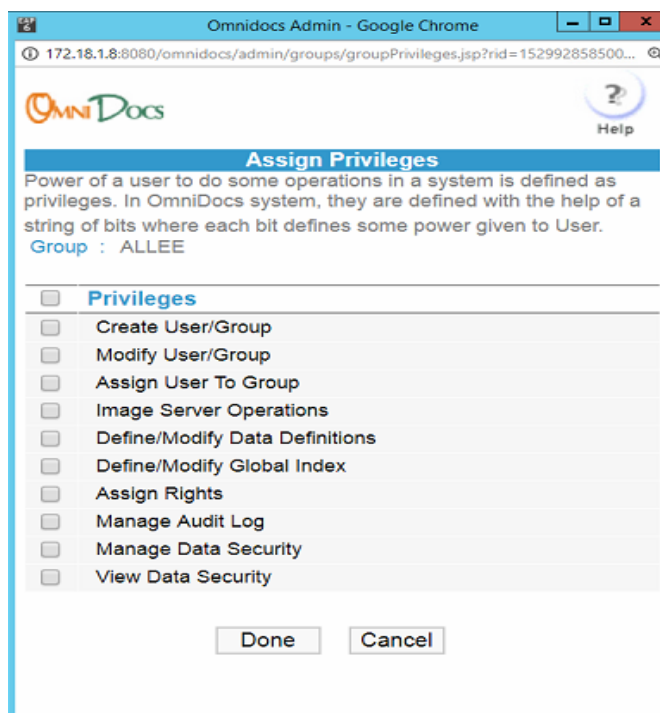
5. To remove a user from the group:-
  - a. Select the particular user from the **Associated User(s)** list.
  - b. Click the **Disassociate** button.

Click **Close** to return to the Group Information Screen.

## 4.5 Assigning Privileges to the Group

You can assign the privileges for the group as well. These privileges are applicable to all the users in that group.

1. Open the Main screen.
2. Select a group.
3. The Group Information screen appears.
4. On the Group Information screen.
5. Click the **Privileges...** button on the Group Properties view on the right pane.
6. The **Assign Privileges** screen appears.



7. Select the options from the **Privileges...** list to assign privileges to the Group.

8. Click the **Done** button on the Assign Privileges screen to save the changes made and return to the Group Information screen.
9. Else, click the **Cancel** button to return to the Group Information screen without saving the changes made.

## 4.6 Assigning Roles to Users of a Group

To assign the roles to users of a group:

1. Open the Main screen and select a group. The Group Information screen appears.
2. Click the **Roles** button on the Group Properties view on the right pane of the Group Information screen.
3. The **Assign Role To Group** screen appears.

Assign Role To Group : Test group - Mozilla Firefox

192.168.4.130:8080/omnidocs/admin/role/groupMain.jsp?GroupIndex=7

OmniDocs

Help

### Assign Role To Group

A role is a logical Entity. Role represents the action to be performed by a particular user.

**Role Association:**

Role:  ...

**User Association:**

User:

Role:

Add

User Name	Role Name
No role has been assigned to any user of this group	

Delete Modify Close

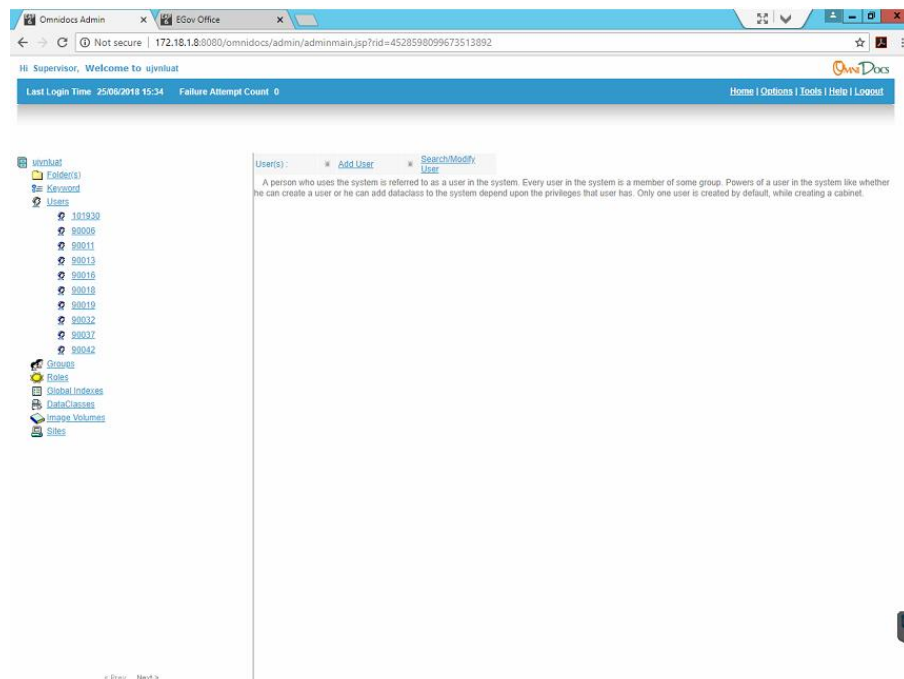
4. Select a **User** from the dropdown list in the User textbox.
5. Select a role if roles are present in the list of roles in the Role textbox.
6. Click the **Add** button to assign the role selected from the Role box to the user of that particular group selected from the User box.
7. To modify the User's Role, click the **Modify** button.
8. To un-assign a role from a user click the **Delete** button.
9. Click the **Close** button to exit from the Roles for Groups screen and return to the Group Information screen.

## 5 Forgot Password and User Account Unlock

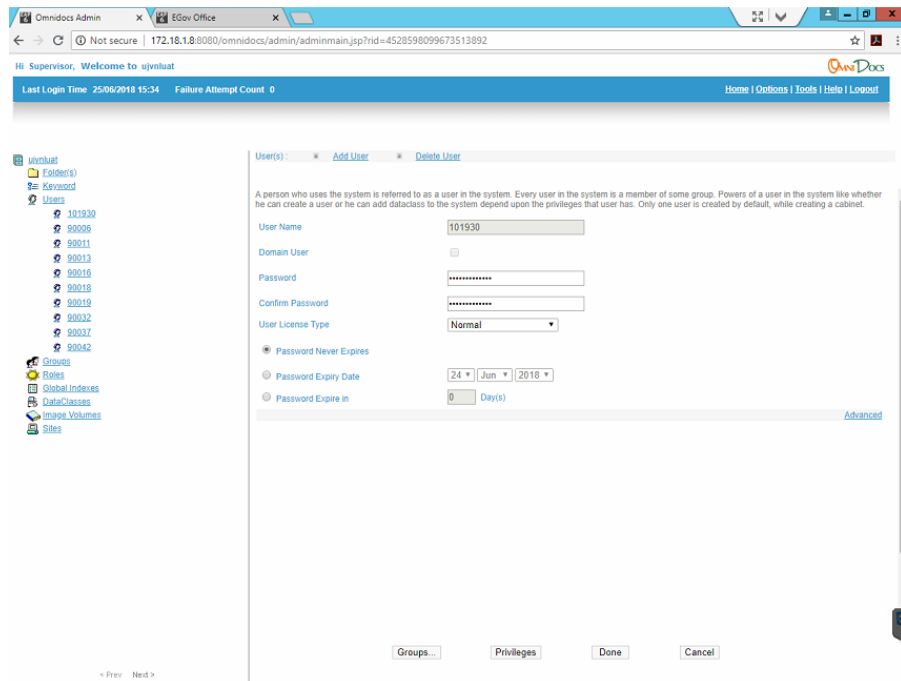
### 5.1 Forgot Password

If a user forgets the password, the admin can change the password by following below steps:

1. Click on **Users** link. The list of users will open.



2. Click on the user for whom the password is to be changed. Below screen appears.

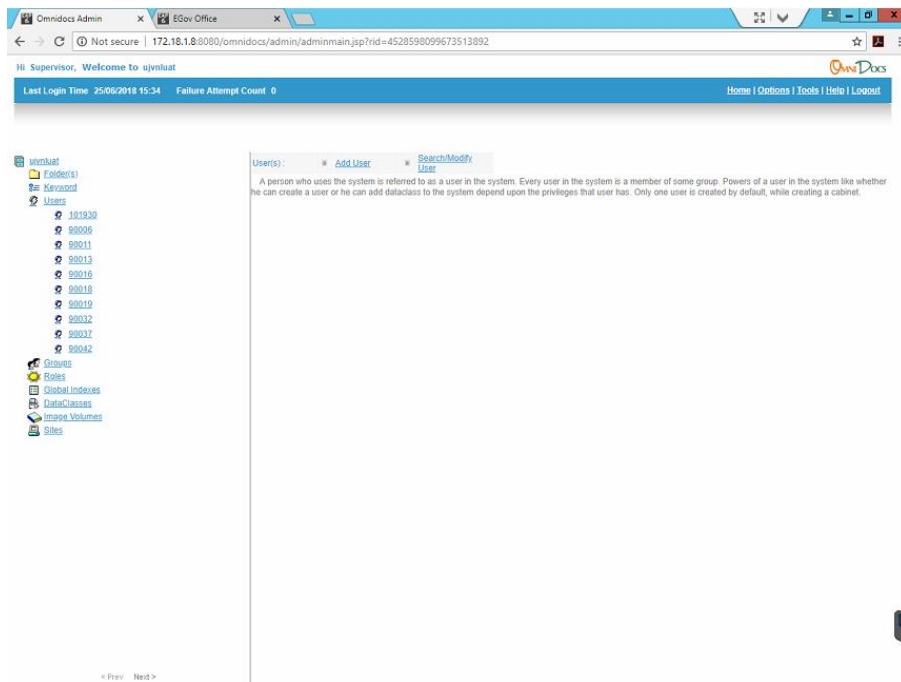


3. Change the password by providing manual input in **Password** and **Change Password** fields.

## 5.2 User Account Unlock

If a user's account gets locked, the admin can unlock it by following below steps:

1. Click on **Users** link. The list of users will open.



2. Click on the user whose account is locked. Below screen appears.

The screenshot shows the 'Add User' form in the Omnidocs Admin interface. The form is for user '101930'. The 'Password Never Expires' checkbox is checked. The 'Advanced' link is visible at the bottom right of the form.

3. Click on **Advanced** link.

The screenshot shows the 'Add User' form in the Omnidocs Admin interface with the 'Advanced Options' section expanded. The 'Account Locked' checkbox is checked. The 'User Account' section shows 'User Active' checked and 'Account Locked' checked.

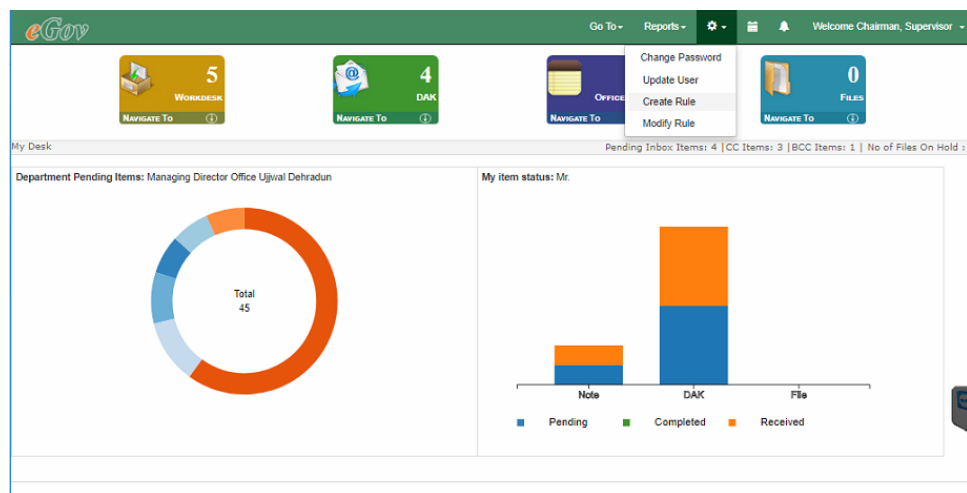
4. If the account is locked the **Account Locked** checkbox would be checked. Uncheck it to unlock the account.

## 6 Create & Modify Rules

### 6.1 Create Rule

Rules can be created in eGov wherein user can define a flow and the movement will take as per the flow. To create a rule, follow the below steps

1. The user needs to click on settings icon and then **Create Rule** link from the list of options.



2. The user needs to enter the **Rule Name** and **Rule Description**.

The screenshot shows the 'Create Rule' form in Google Chrome. The form has two input fields: 'Rule Name' with the value 'Approval Flow' and 'Rule Description' with the value 'Flow 1'. Below the input fields is a green 'Add User' button. The browser address bar shows the URL: '172.18.1.8:8080/egov/actionitem/touserlist1/newsearch.jsp?ruleCreatedVia=su...'. The page title is 'Create Rule - Google Chrome'.

3. Now search users from any of the mentioned criterion.

**Select User(s)**

Department:  Designation:

Group:

**Search Result**

**Final List**

- The results will appear under the **Search Result** column. The users can be selected and added by clicking on **Add** button.

**Select User(s)**

Department:  Designation:

Group:

**Search Result**

90032, ()  
90049, ()  
92884, ()  
930015, ()  
93013, ()  
930294, ()  
930312, ()  
930314, ()  
930420, ()  
930453, ()

**Final List**

90032, ()  
93013, ()  
930312, ()



5. Users will be added and below screen will appear when user clicks done.

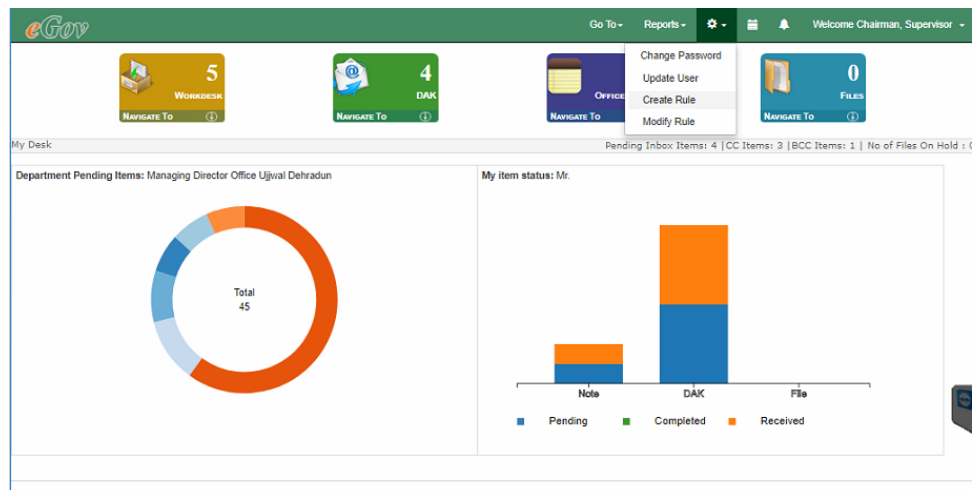
	User Name	Department	Designation
<input type="checkbox"/>	S3013	DGM (IT) Dehradun	DGM
<input type="checkbox"/>	S0032	DGM (IT) Dehradun	EE
<input type="checkbox"/>	S30312	DGM (IT) Dehradun	JE

6. The user can add more users in the flow by clicking on **Add User**. A user can be deleted by selecting a user and clicking **Delete User** button. On clicking **Done**, the rule will be created and added to the system.

## 6.2 Modify Rule

Previously created rules can be modified in eGov whenever a user wants to make change in the flow. To modify a rule, follow the below steps

1. The user needs to click on settings icon and then **Modify Rule** link from the list of options.



2. The user will get a window to select the **Rule Name**.

The screenshot shows a web browser window titled 'Modify Rule - Google Chrome'. The address bar shows the URL '172.18.1.8:8080/egov/actionitem/touserlist1/ruleList.jsp?ruleCreatedVia=super...'. The page has a green header with the text 'Modify Rule'. Below the header, there is a form with a label 'Rule Name :', a dropdown menu with the text 'Please select a Rule', and a 'Show Rule' button. At the bottom right of the form, there are two buttons: 'Delete Rule' and 'Modify Rule'.

2. After selecting the rule, the user needs to click on **Show Rule** button. Below screen will appear on click of **Show Rule**.

User Name	Department	Designation
test1	DGM (IT) Dehradun	Deputy General Manager
test3	Chairman Office Ujjwal Dehradun	Chairman
test2	Director (Operations) Dehradun	Director
test4	Managing Director Office Ujjwal Dehradun	Managing Director

3. On clicking **Modify Rule** below screen will open. The user will be able to add new user, remove old users from the flow and change the sequence of flow.

Search Result	Final List
	test1
	test3
	test2
	test4

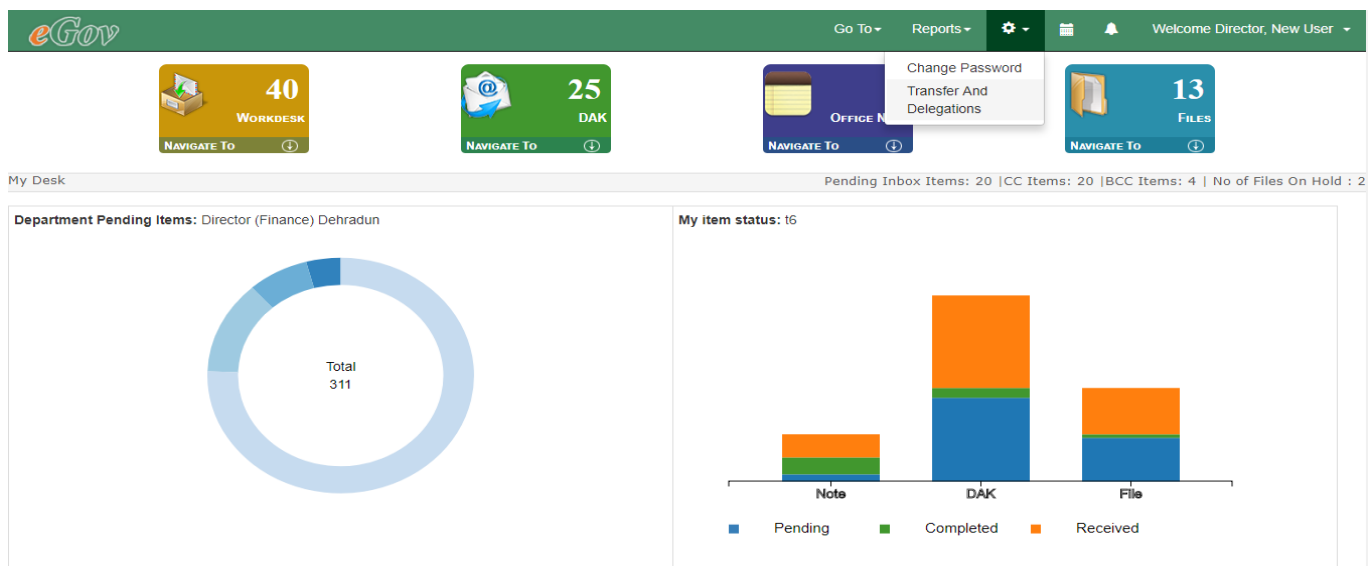
# 7 Transfer & Delegation (Additional Charge)

## 7.1 Providing Delegation Rights

In this module, a user will be able to provide additional charge to another user in case of his absence. As a result, DAK/File/Office note movement and approval process will not be hampered.

To delegate, the user has to follow the below steps:

1. The user needs to click on settings icon. The **Transfer and Delegations** link will be appear in list.



2. On clicking **Transfer and Delegations**, below popup will appear. The user can search by either **User Id** or **Name of User**.

The screenshot shows a web browser window titled 'Delegation - Google Chrome'. The address bar shows the URL '192.168.52.74:8080/egov/transfer.jsp?egovID=-4300217662129201901'. Below the address bar, there is a search form with the title 'Search Criteria'. The form has two input fields: 'User Id' and 'Name Of User', each with an 'Enter' button. Below the input fields, there are two buttons: 'Search' and 'Refresh'.

3. After entering the search criteria, the user needs to click on **Search**.

Delegation - Google Chrome

Not secure | 192.168.52.74:8080/egov/transfer.jsp?egovID=-43002176621292019...

Search Criteria

User Id 930026 Name Of User Enter

Search Refresh

Set Diversion

	User Id	Name Of User
<input checked="" type="radio"/>	930026	930026

4. The user needs to select the radio button and click on **Set Diversion**. The below screen will open.

Delegation - Google Chrome

192.168.52.74:8080/egov/deligSearchUsers.jsp?egovID=-4300217662129201901&sel...

Back

From User Id\* 930026

To User Id\* Enter userid

From Date\* From Date

To Date\* To Date

☐ Include Current Workitems

☐ Assign Back Diverted Workitems

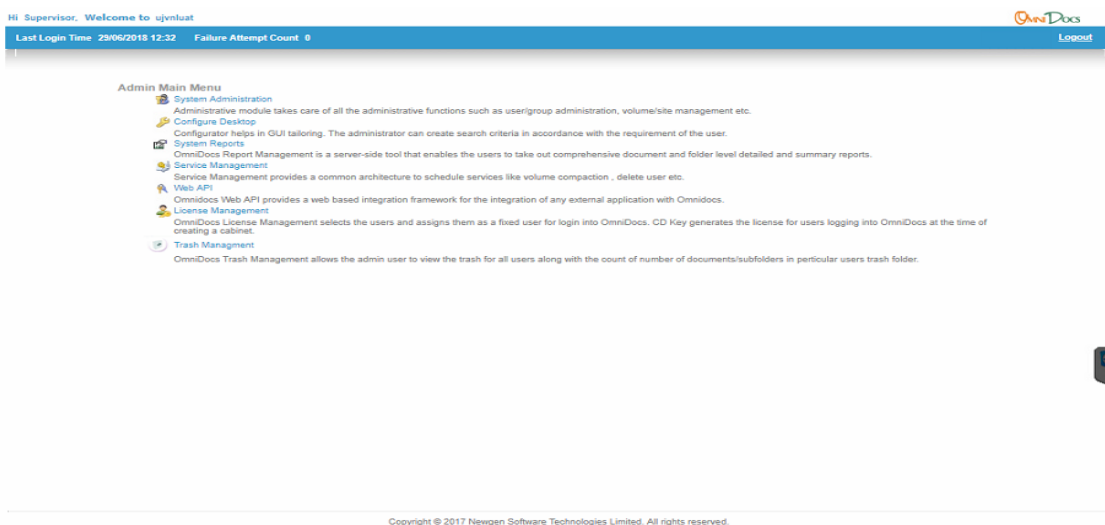
Assign Delete

5. The user needs to enter the user id of the delegate in the To User Id field. The from and to dates need to be entered. The user can also select the option whether to Include **Current Workitems** and **Assign Back Diverted Workitems**. After entering all the information, the user needs to click **Assign** to delegate his/her responsibilities to other user.

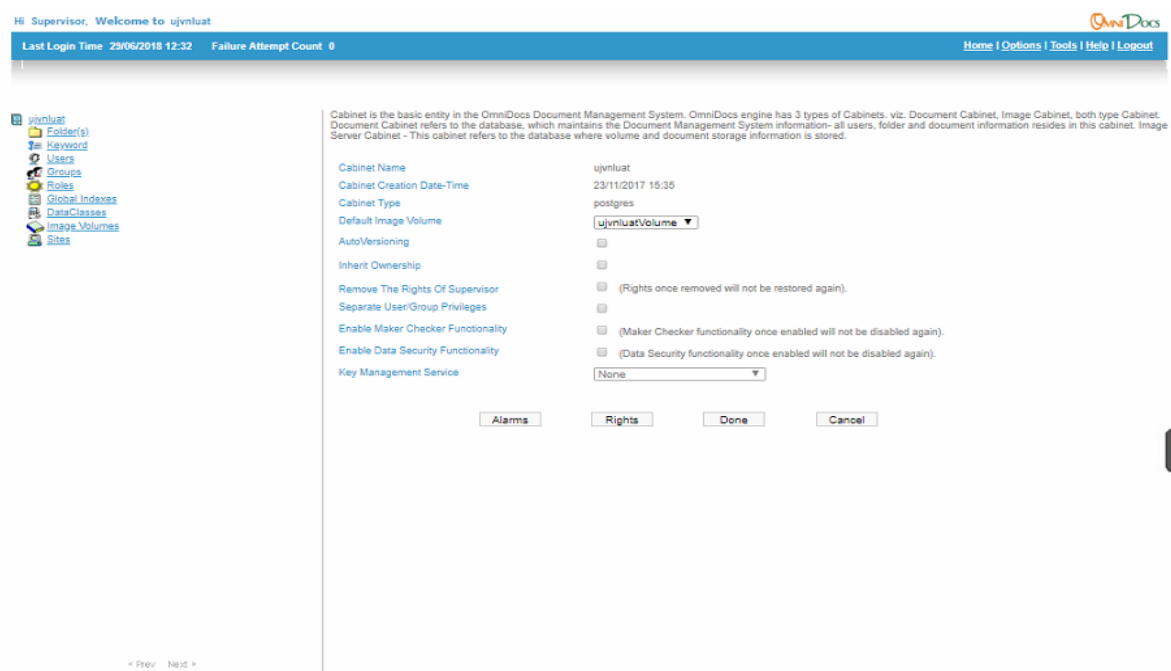
## 7.2 Revoking Delegation Rights

To revoke any transfer and delegation rights, user needs to do it from OmniDocs. The user to whom the access is granted will be required to be removed from the corresponding group and folder. Once the delegated user is removed, his/her delegation rights will be revoked. Follow the below steps to do the same.

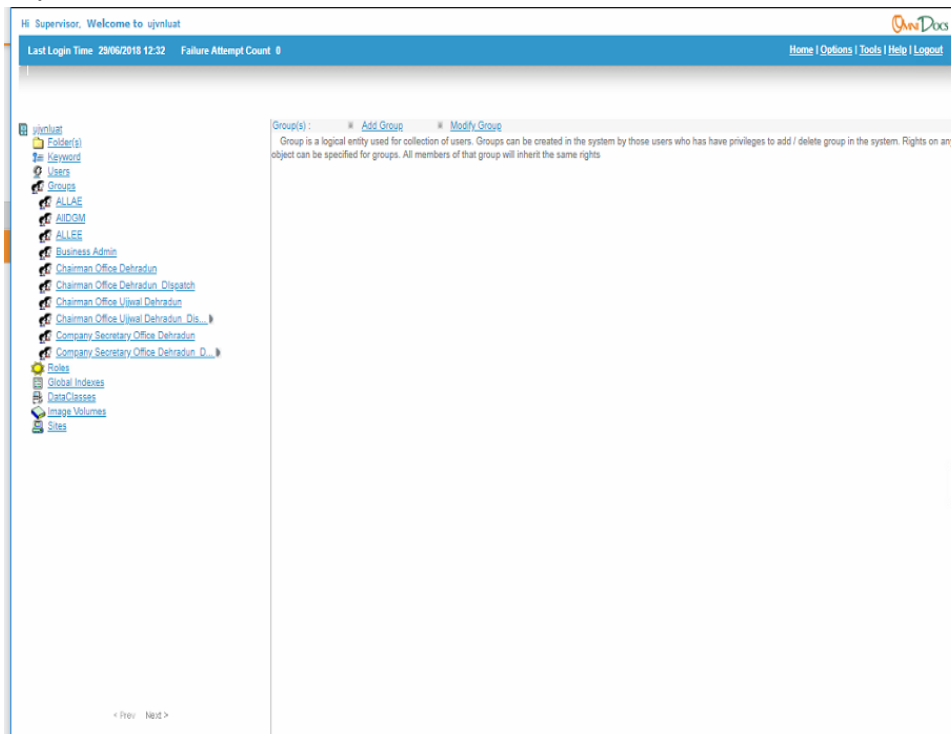
### 1. Login to OmniDocs.



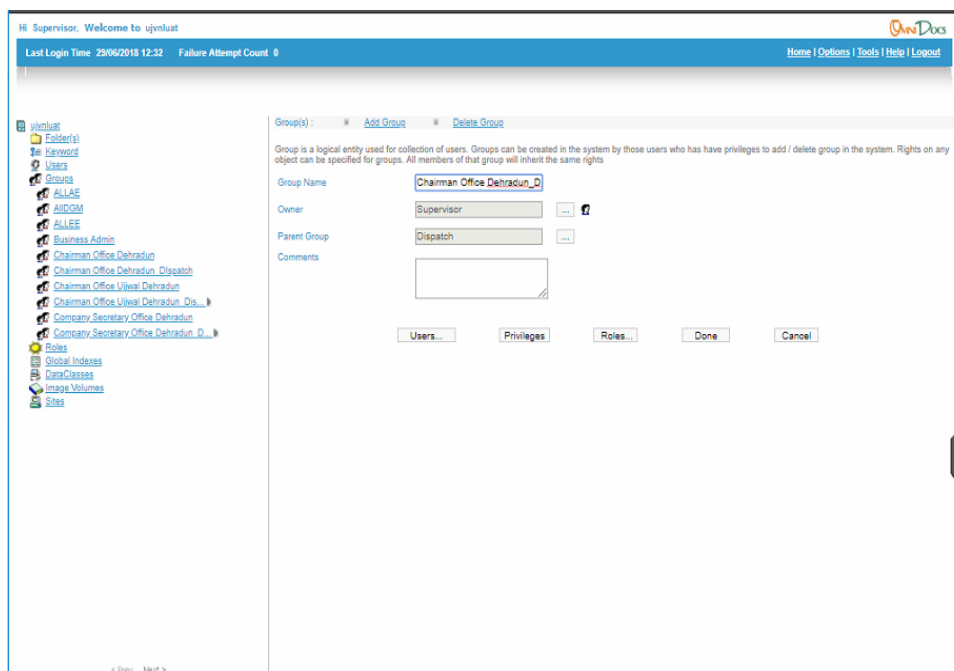
### 2. Click on System Administration. Below screen will open.



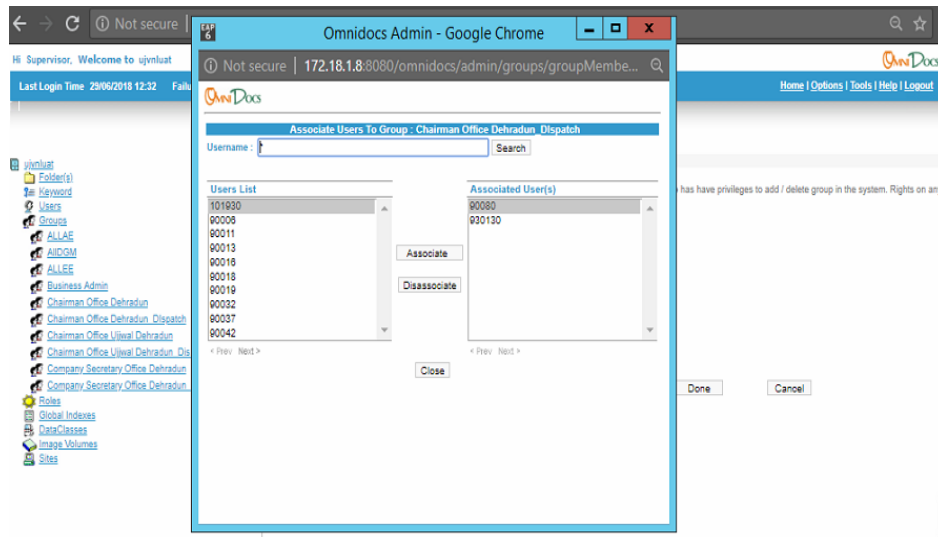
### 3. Click on Groups link.



### 4. Click on the Group Name to which the person has been delegated.

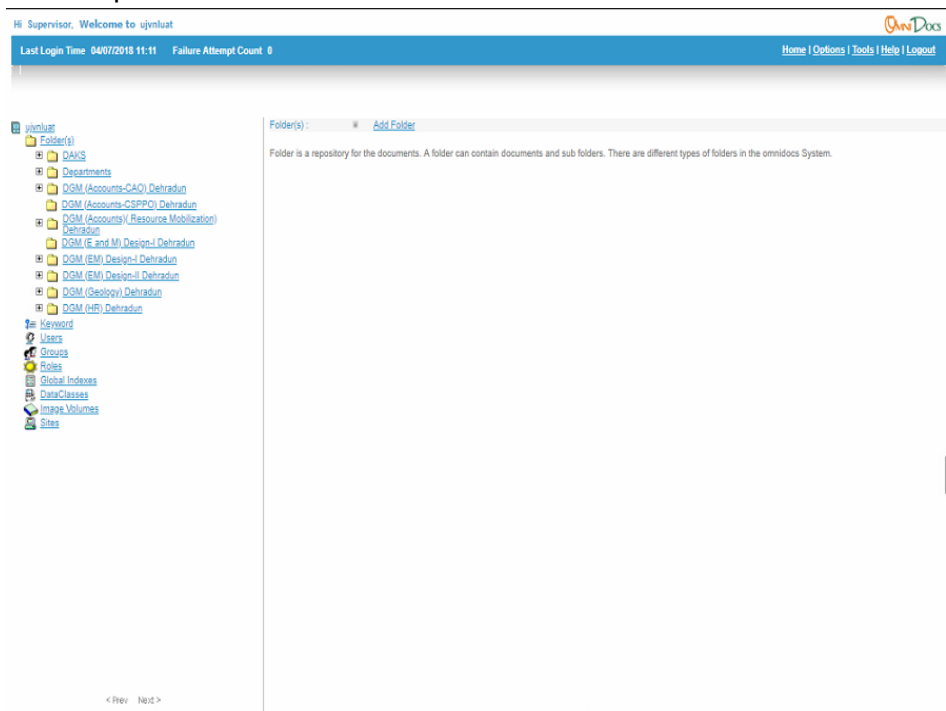


5. Click on Users button. All the users associated to that group would be displayed.



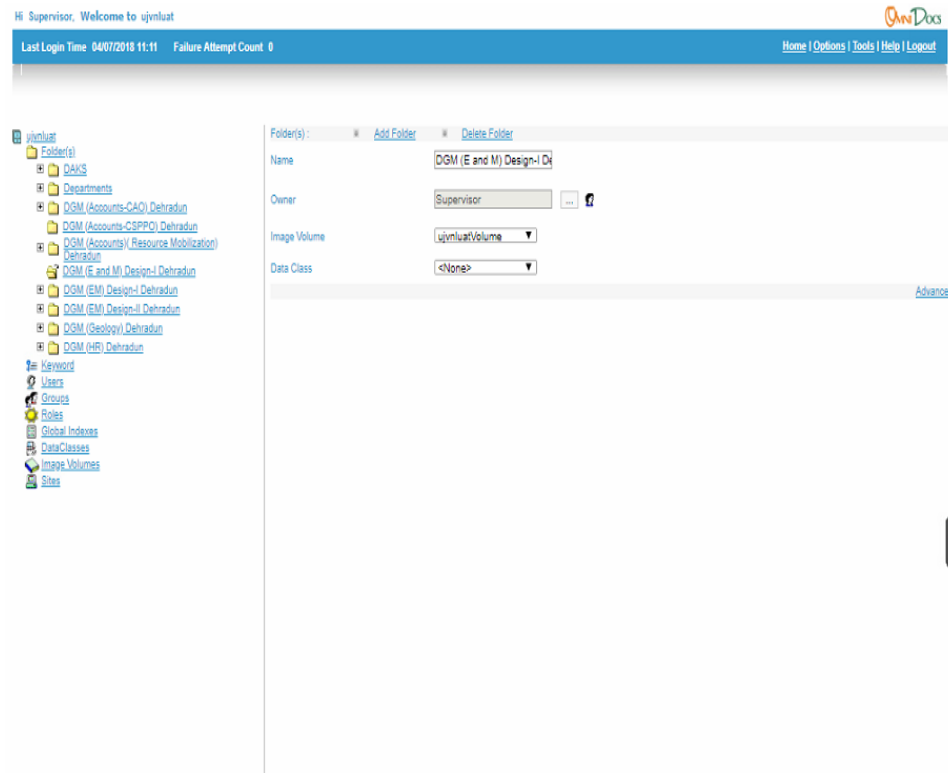
6. The users associated to that particular group can be disassociated after selection.

7. Now the user access has to be removed from the Folder as well. Click on the folders link. Below screen will open.

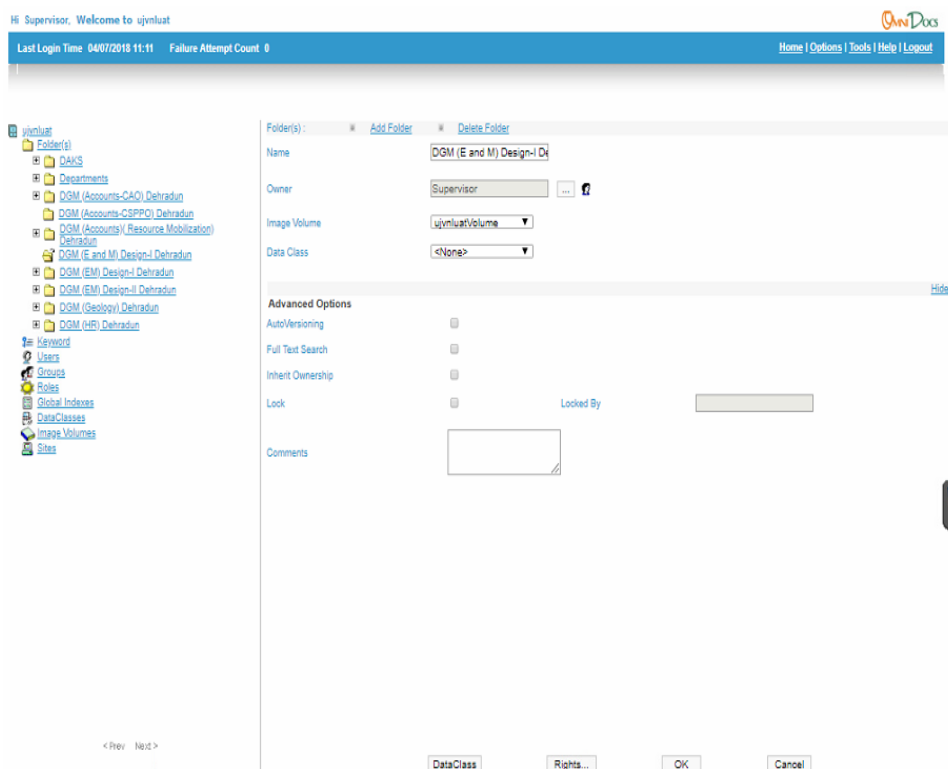




8. Click on the corresponding folder. Below screen will open.



9. Click on **Advanced** link to modify the access rights.



10. Click on **Rights** button to remove access.

**Share Folder : DGM (E and M) Design-I Dehradun**

You can selectively share a folder amongst the members of your virtual team. You can select the user(s) and/or group(s) to whom you want to give rights on this Folder. Consequently Read, Write, Change, Annotate or Delete rights can be assigned to them.  
If you make this Folder as Inherited then the user(s)/group(s) would inherit the rights on this Folder from its Parent Folder. If you make this Folder as Private, then no other member of your Cabinet would be able to access this folder. [More](#)

Sharing : ☐ Private ☒ Shared ☐ Inherited

Group(s) : <Search Group> ... Add Group Role(s) : <No Roles Exists> ... Add Role

User(s): 90011 ... Add User

	Group(s)/User(s)/Role(s)	Read	Create	Annotate	Modify	Delete	Advanced
<input type="checkbox"/>	DGM (E and M) Design-I Dehradun	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Advanced</a>
<input type="checkbox"/>	Everyone	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Advanced</a>
<input checked="" type="checkbox"/>	90011	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<a href="#">Advanced</a>

11. Check the checkbox corresponding to the user id of the user who is to be removed and click **Remove**. The user will be removed and access will be revoked.

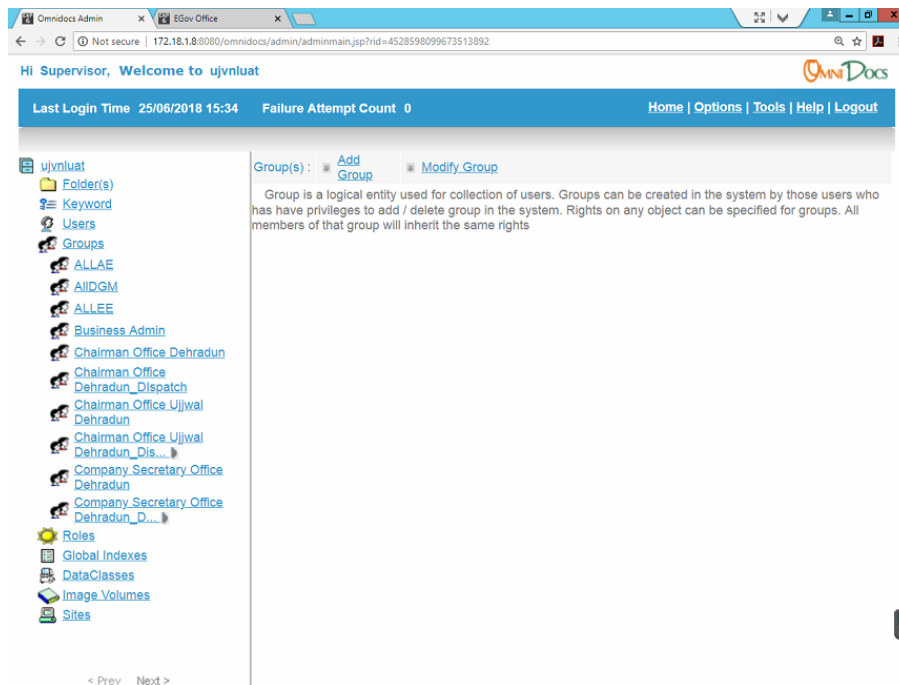
## 8 Custom Group Creation/deletion (For Bulk communication)

This chapter includes customized group creation and deletion. These groups can be used to send bulk communications.

### 8.1 Creating a Customized Group

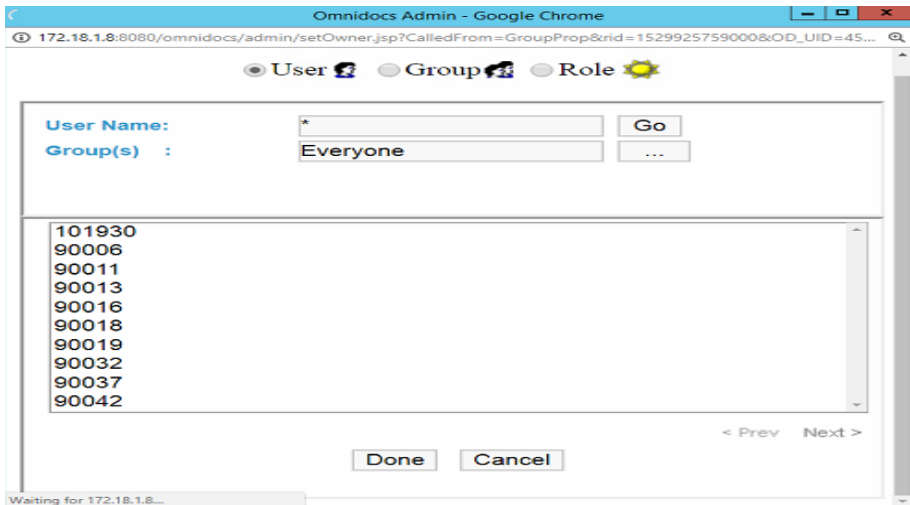
To create a group:

1. Click the **Groups** link on the left pane of the Main screen.
2. The **Group Information screen** appears.
3. List of groups in batches is shown on the left pane and the description of group on the right pane.

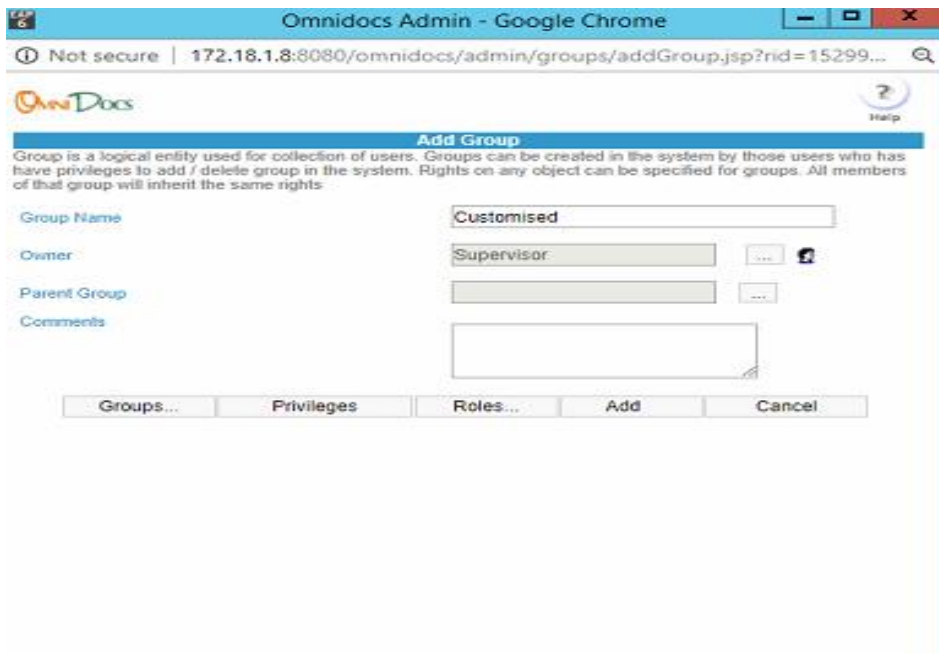


4. Click the **Add Group** link on the right pane of the Group Information screen.
5. The Add Group screen appears.

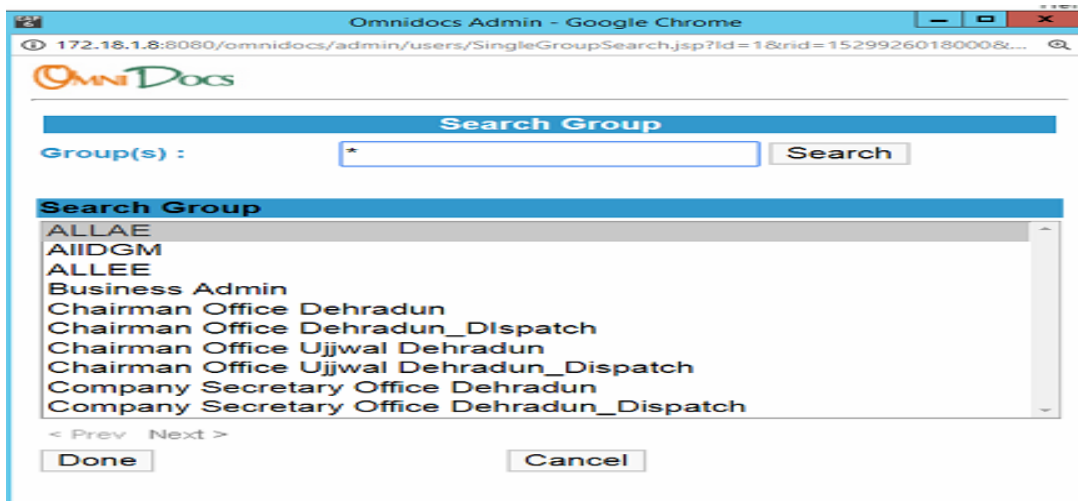
6. Type the name of the customized group in the **Group Name** textbox.
7. You may modify the Owner by selecting from the **Owner** list box.
8. To select Owner, click on Ellipsis button. Following screen will appear.



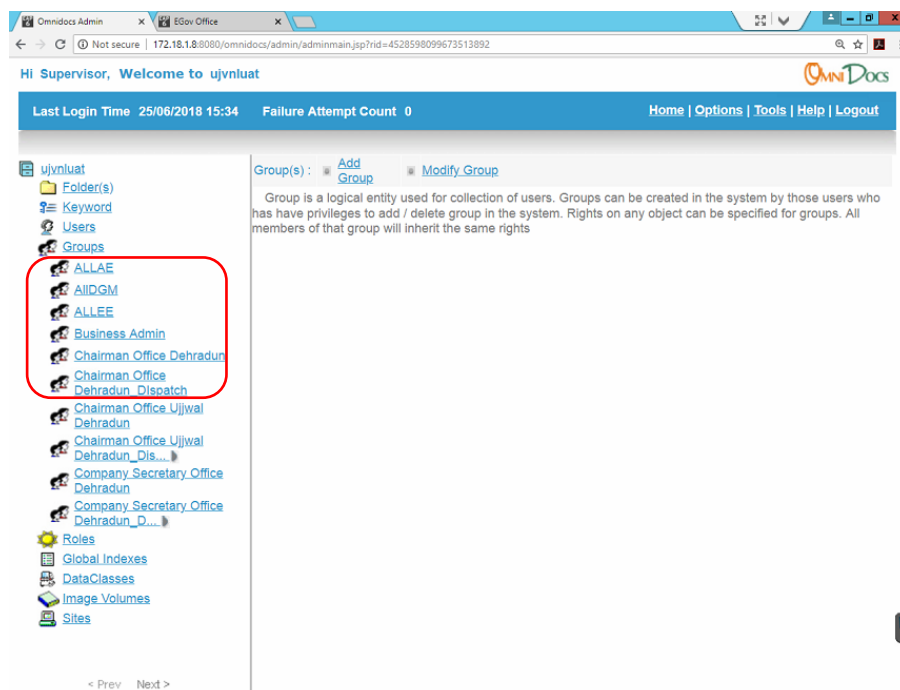
9. From this dialog box, assign ownership to the required **User/Group/Role**.
10. Once the ownership is assigned, click on **Done** button.
11. To close the Dialog Box, without making any changes, click on **Cancel** button.



12. You may modify the Parent Group by selecting from the **Parent Group** list box.



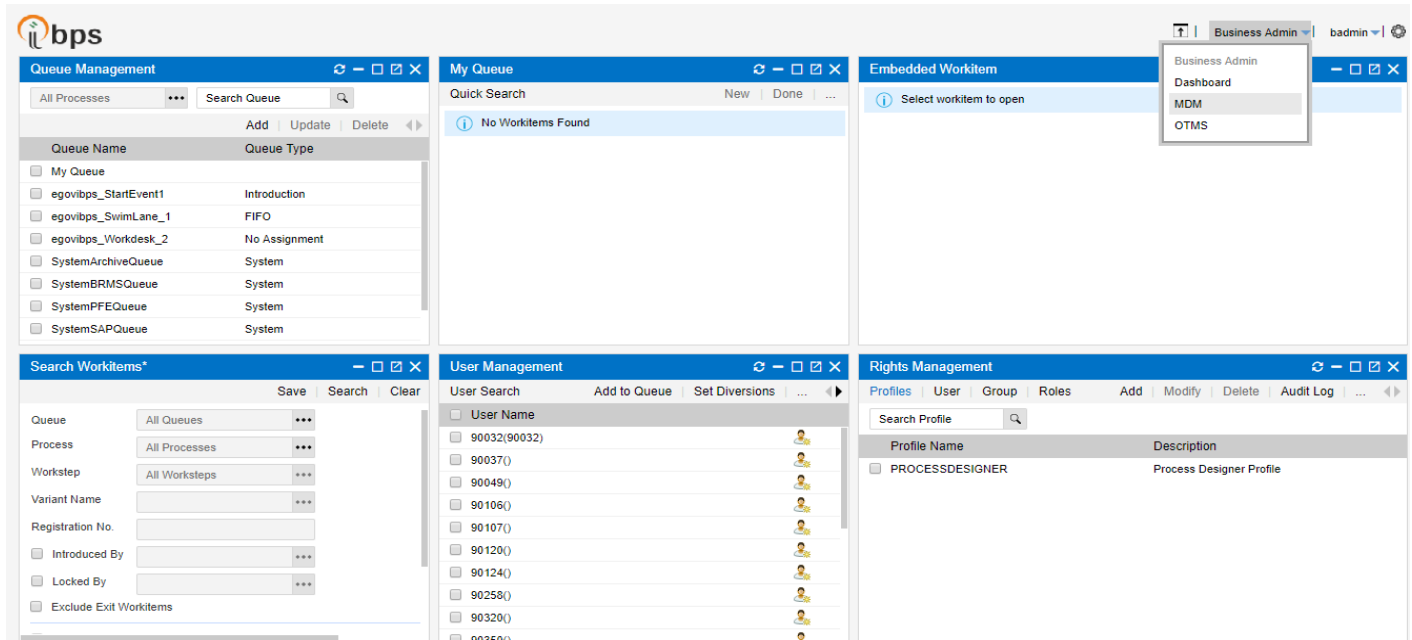
13. Type a comment to be associated with the group in the **Comments** textbox.
14. Click the **Add** button to add the group to the list of Groups shown on the left pane of the Group Information screen and return to the Group Information screen.
15. Or, click the **Cancel** button to exit from the **Add Group** screen without saving the changes made.



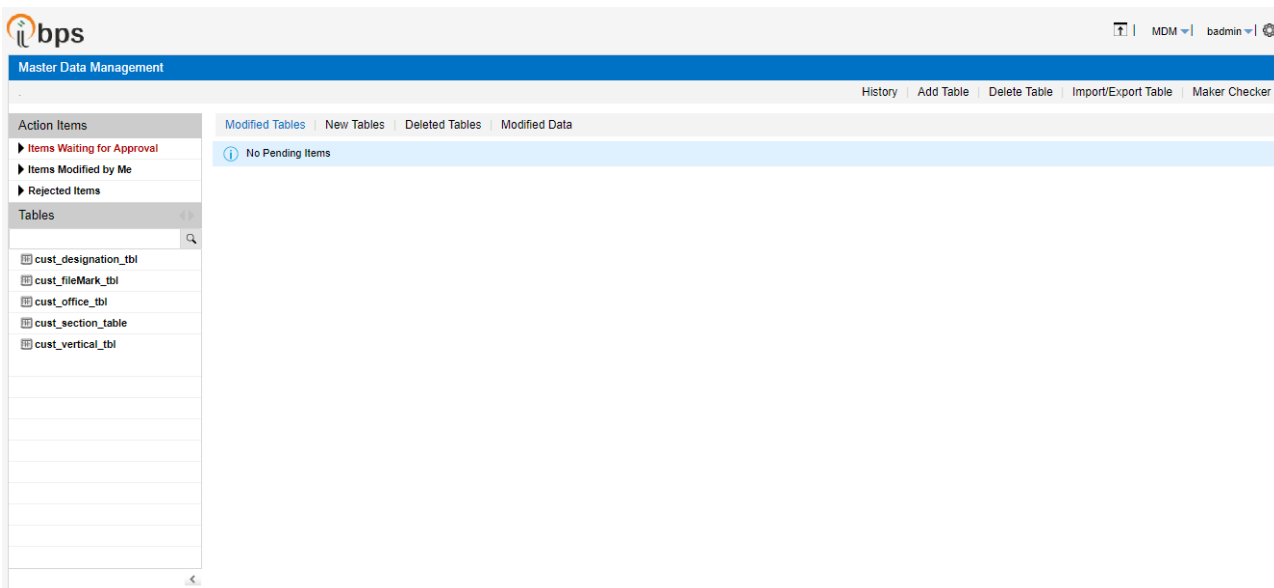
## 9 Office Template Creation/Modification with Office Address in English & Hindi

The admin can create office in the MDM module of ibps. To create/update office follow the below steps:

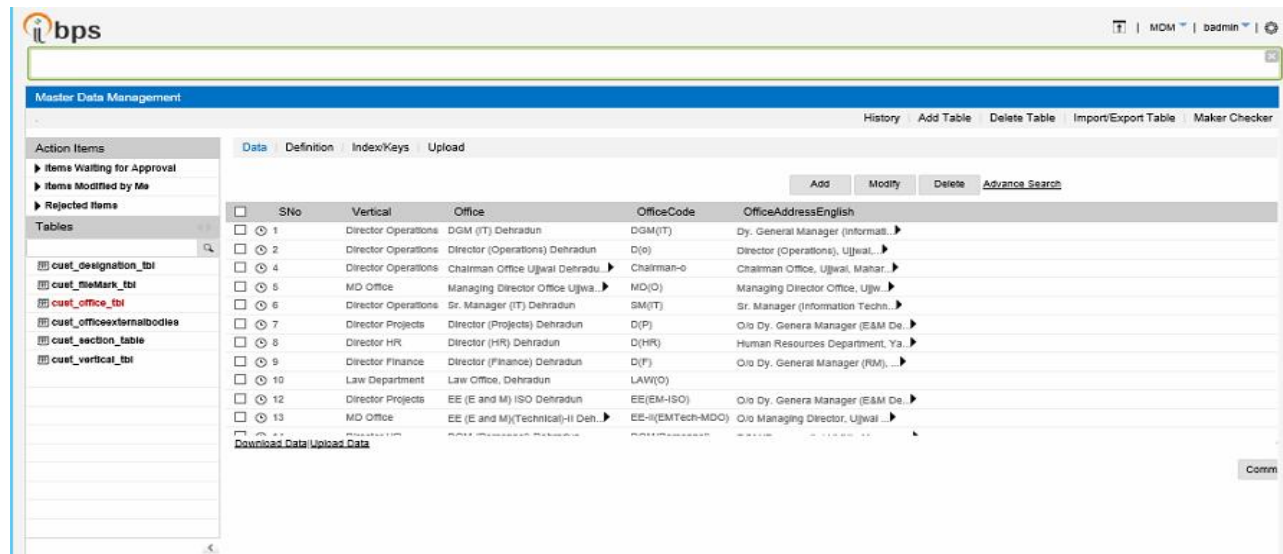
1. Login to ibps using your credentials. Below screen will appear.



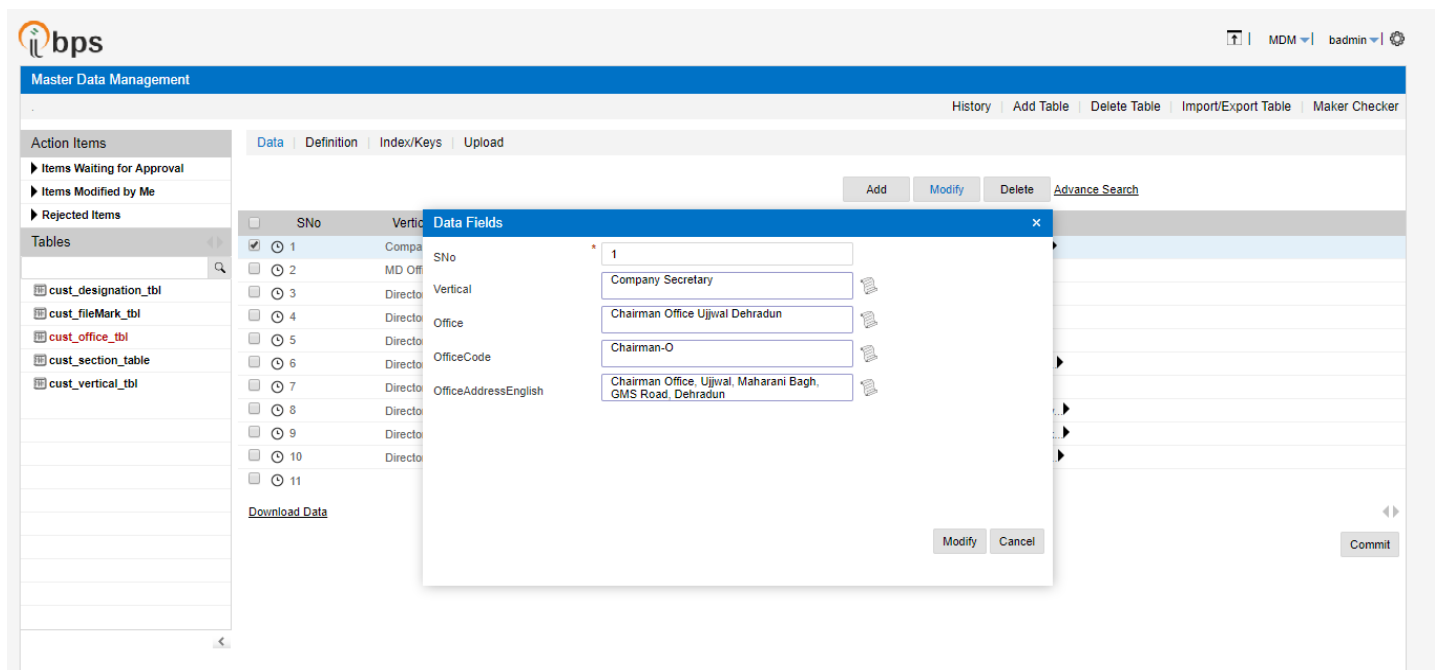
2. Click on downward arrow next to Business Admin. The options will appear. Click on MDM. Below screen will appear.



3. Click on **cust\_office\_tbl** link in the left pane.

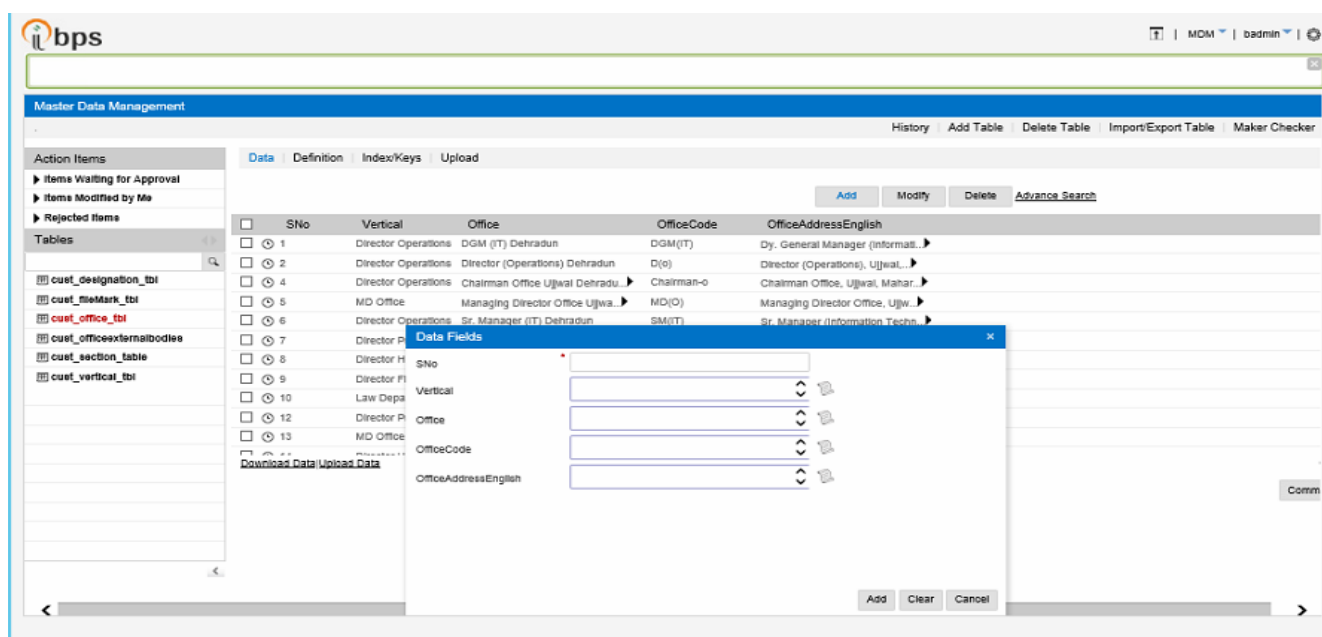


4. Select an office and click on **Modify** to make changes to office. A pop up window will appear as shown below.



Changes can be made to any of the field such as SNo, Vertical, Office, OfficeCode and OfficeAddressEnglish data field.

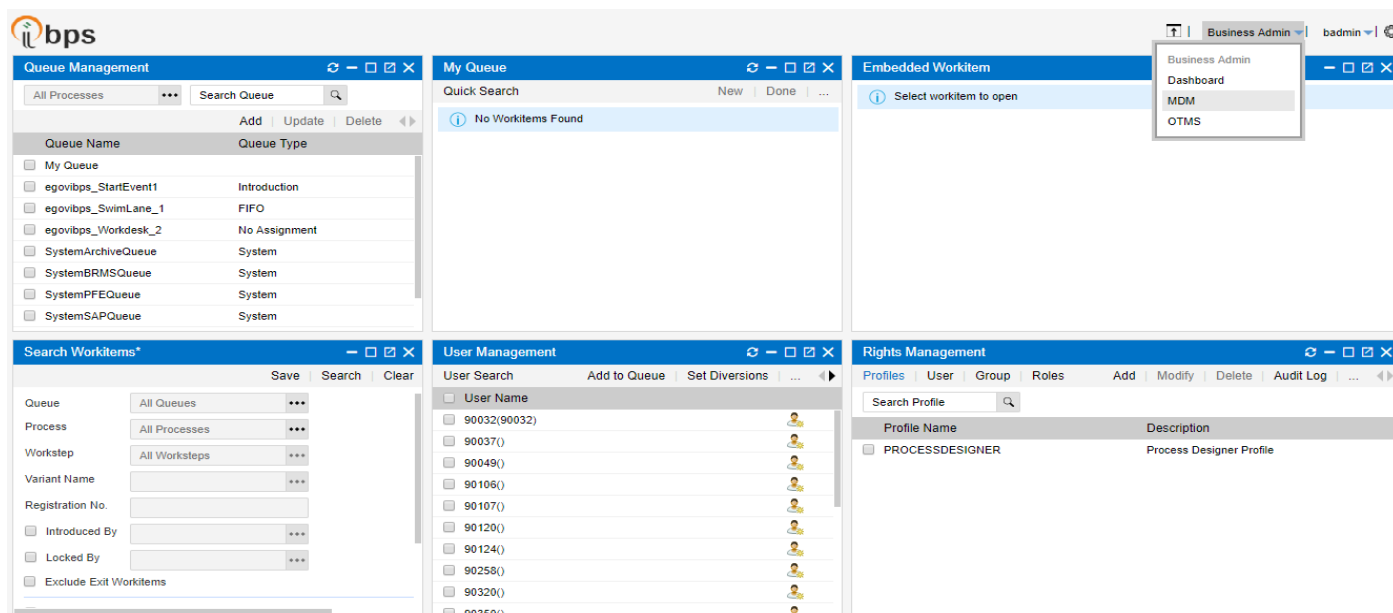
5. To modify a particular entry, select the row and click Modify.



## 10 Creation of Section in an Office

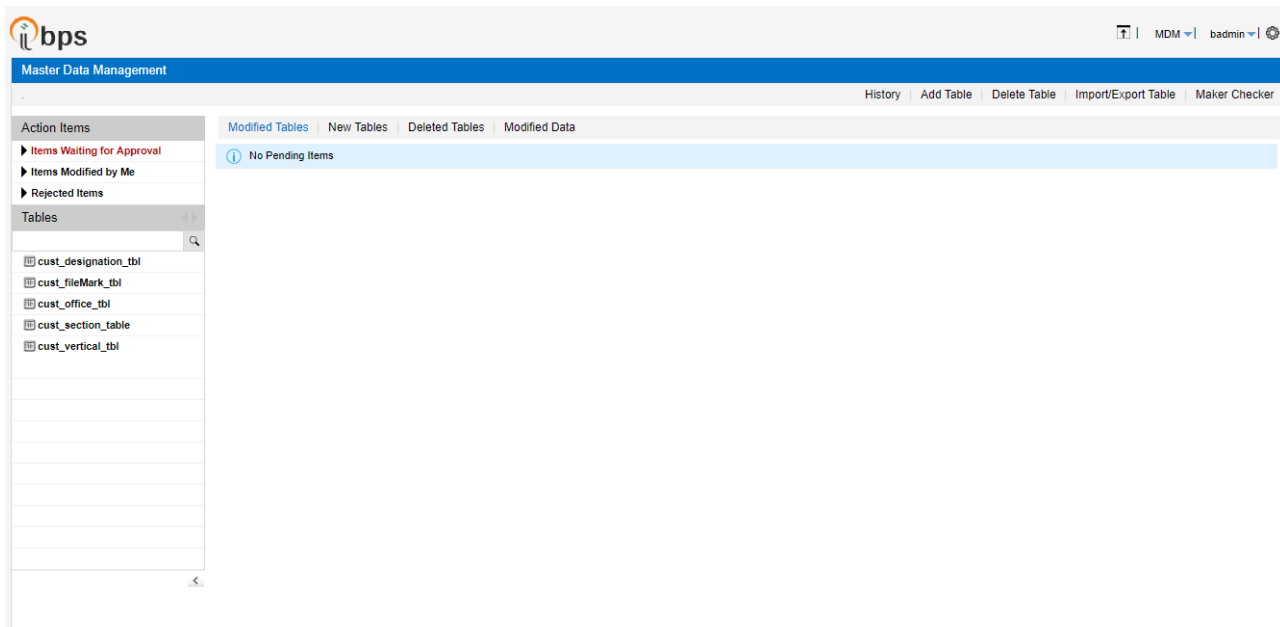
The admin can create sections in the MDM module of ibps. To create/update sections follow the below steps:

1. Login to ibps using your credentials. Below screen will appear.

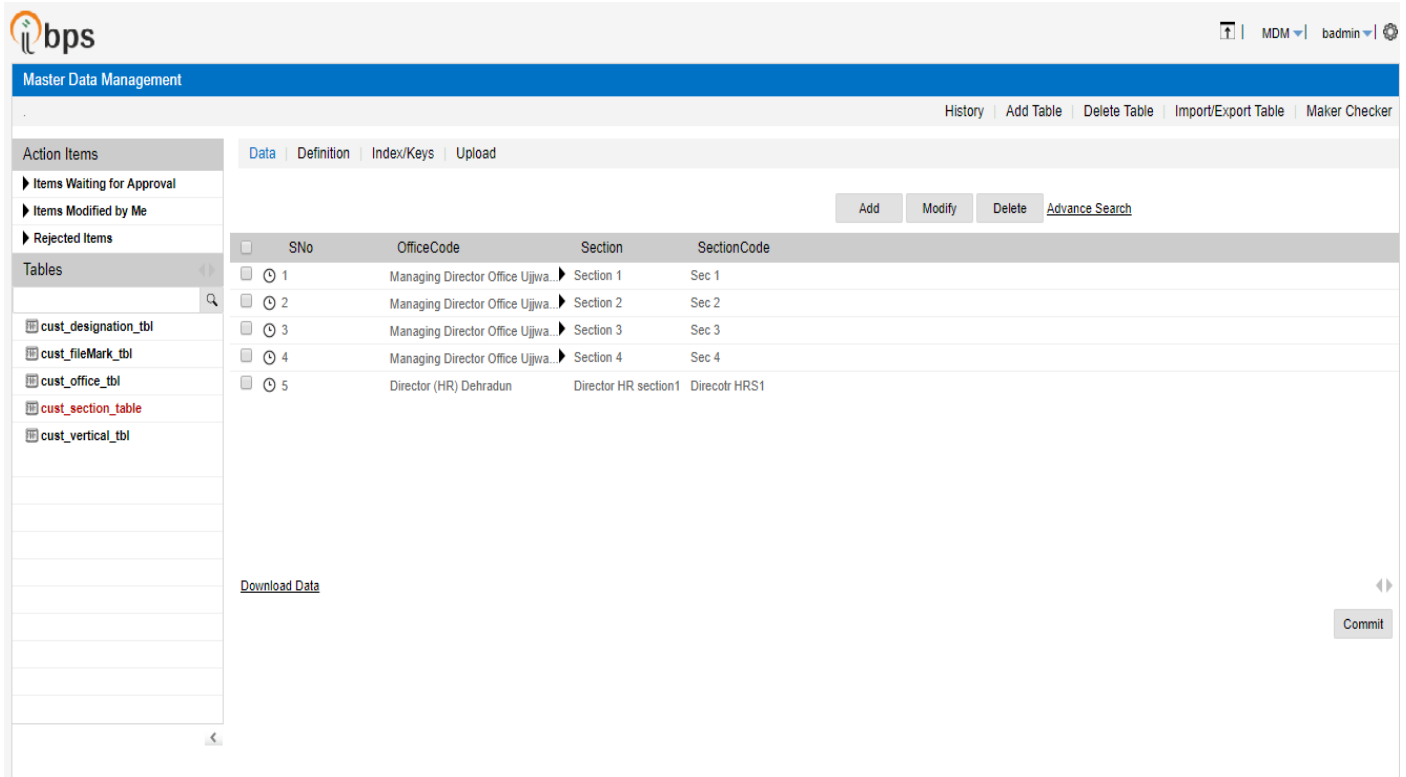




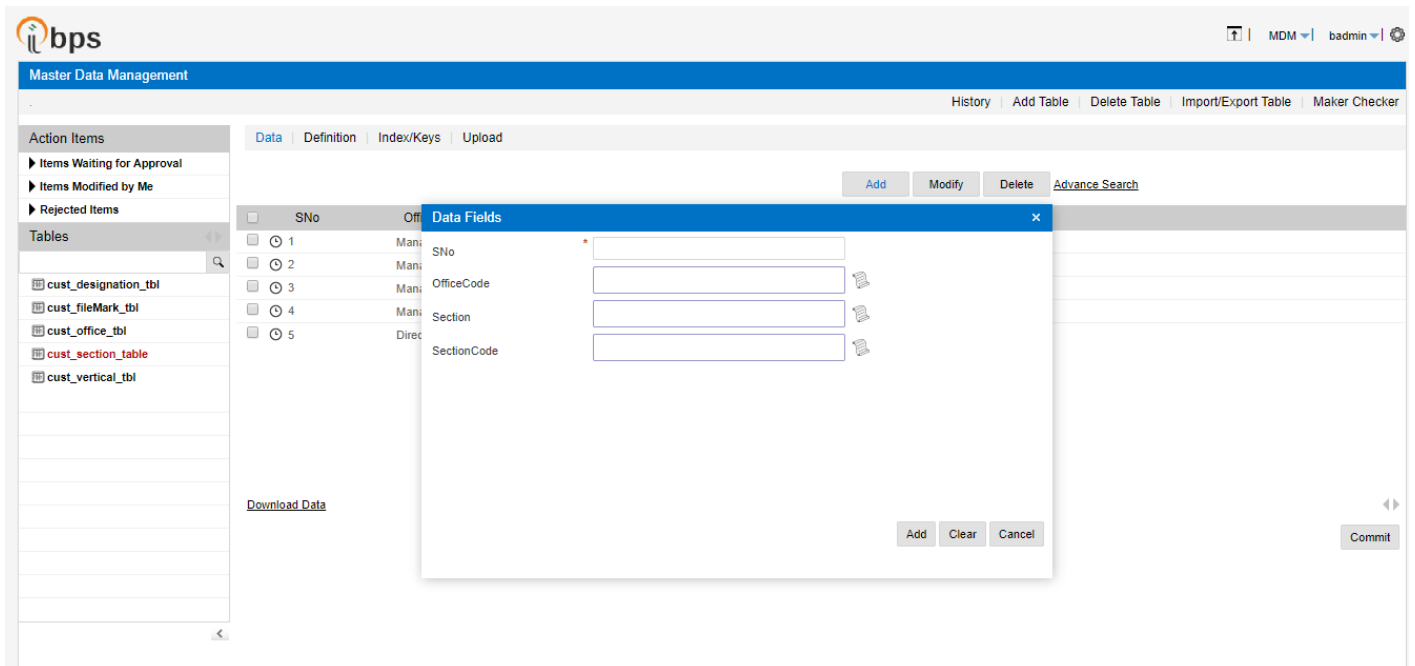
2. Click on downward arrow next to Business Admin. The options will appear. Click on MDM. Below screen will appear.



3. Click on **cust\_section\_table** link in the left pane.



4. Click on **Add** to create a new section. A pop up window will appear as shown below.



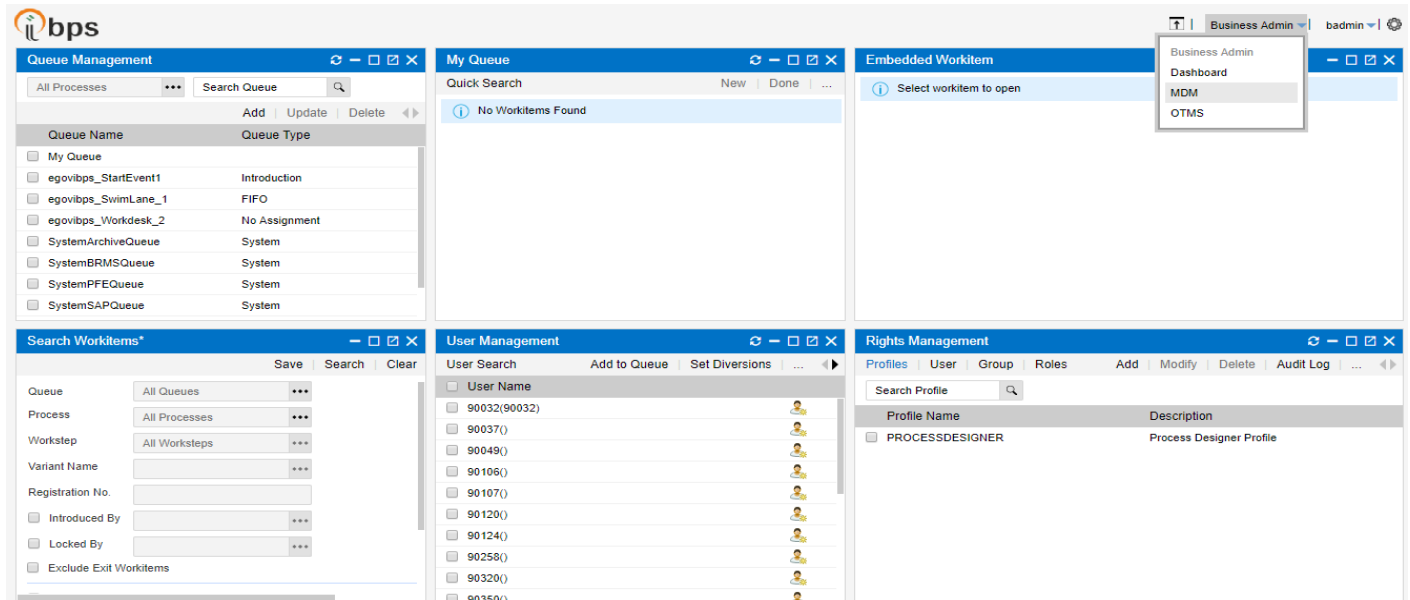
Enter the SNo. , OfficeCode, Section and SectionCode data fields and click Add.

5. To modify a particular entry, select the row and click Modify.

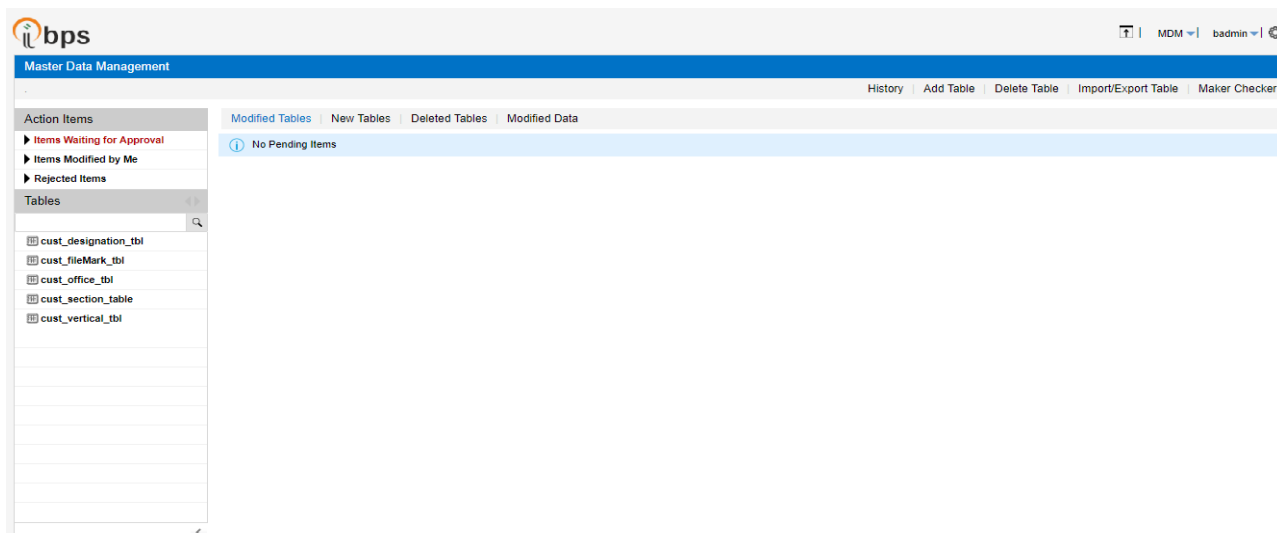
# 11 Creation of Designation in an Office

The admin can create designation in the MDM module of ibps. To create/update designation follow the below steps:

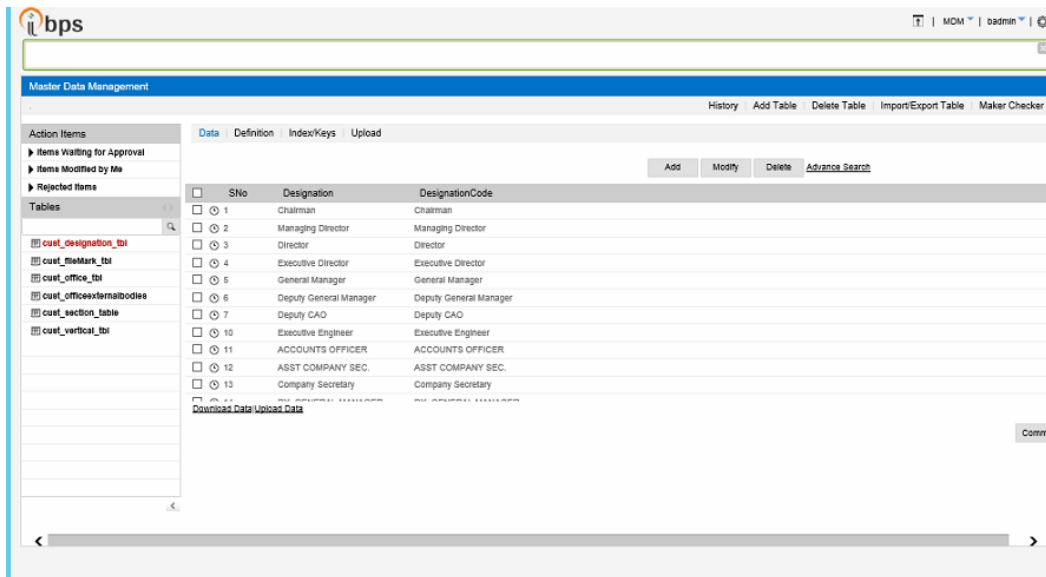
1. Login to ibps using your credentials. Below screen will appear.



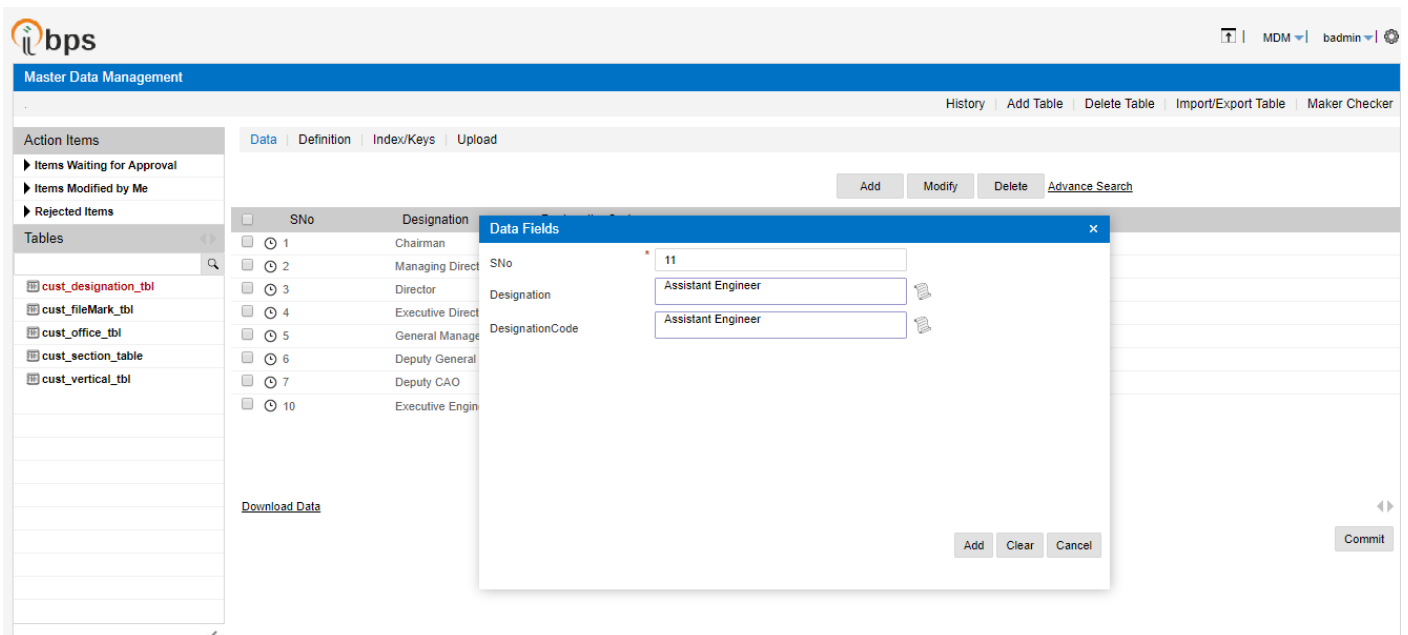
2. Click on downward arrow next to Business Admin. The options will appear. Click on MDM. Below screen will appear.



3. Click on **cust\_designation\_tbl** link in the left pane.

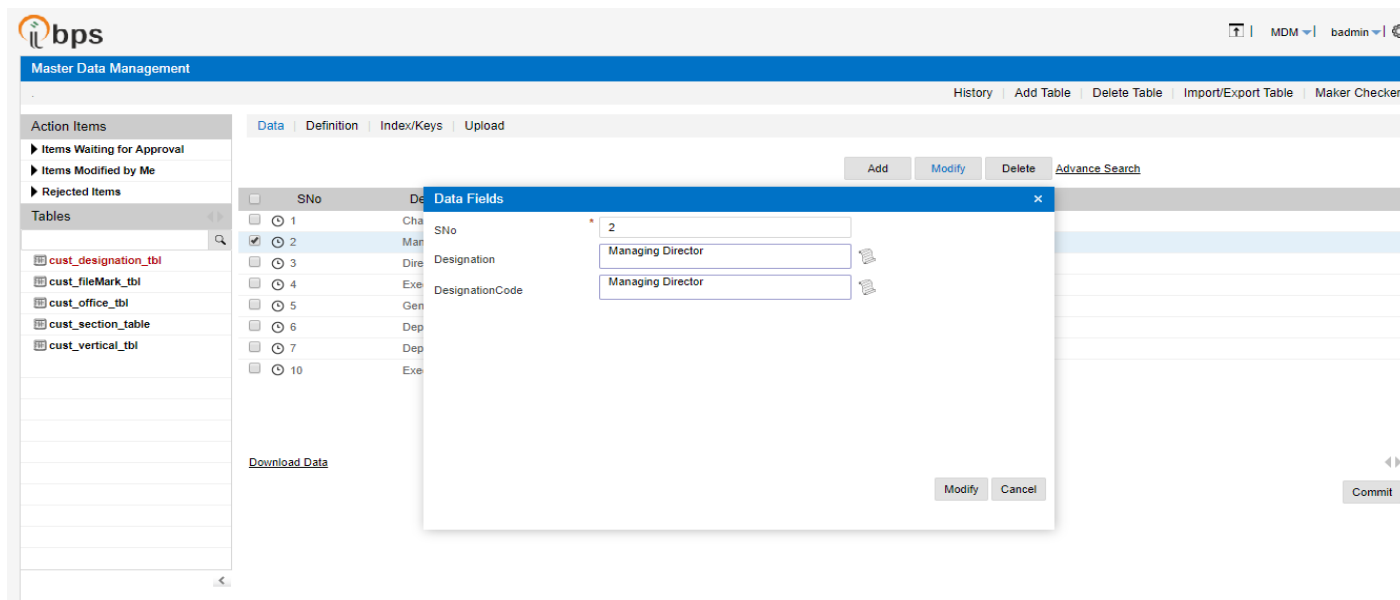


4. Click on **Add** to create a new designation. A pop up window will appear as shown below.



Enter the SNo. , Designation and DesignationCode data fields and click Add.

5. To modify a particular entry, select the row and click Modify.

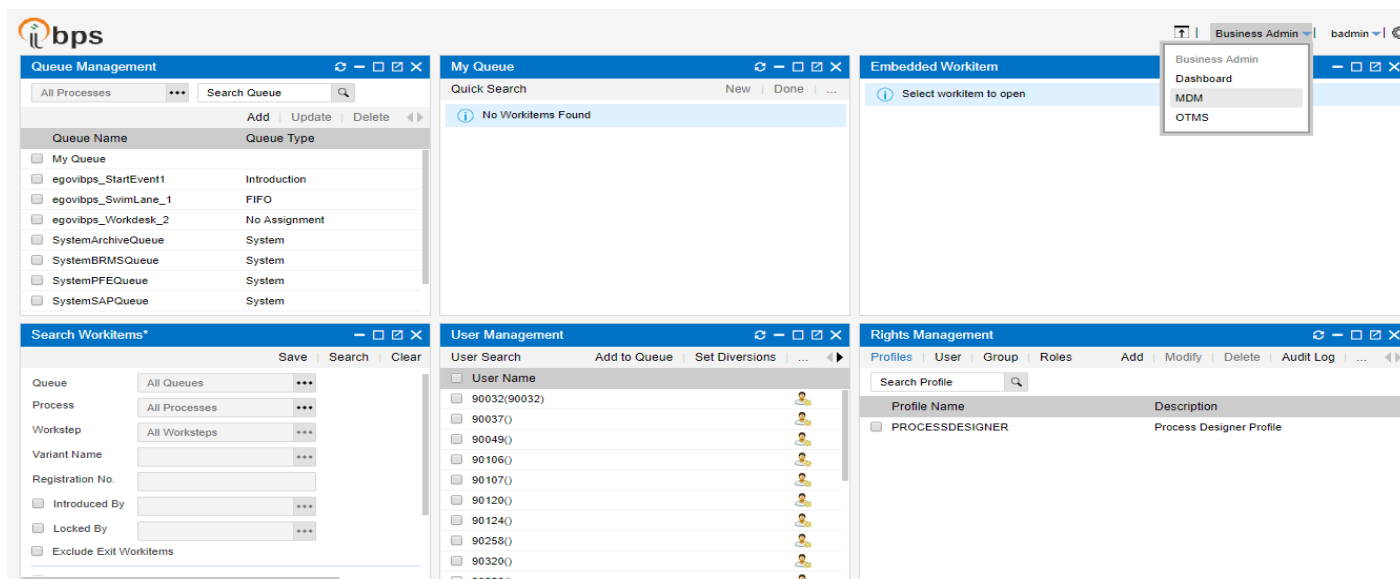


A pop up window will open. User can make required changes and click on Modify to update it.

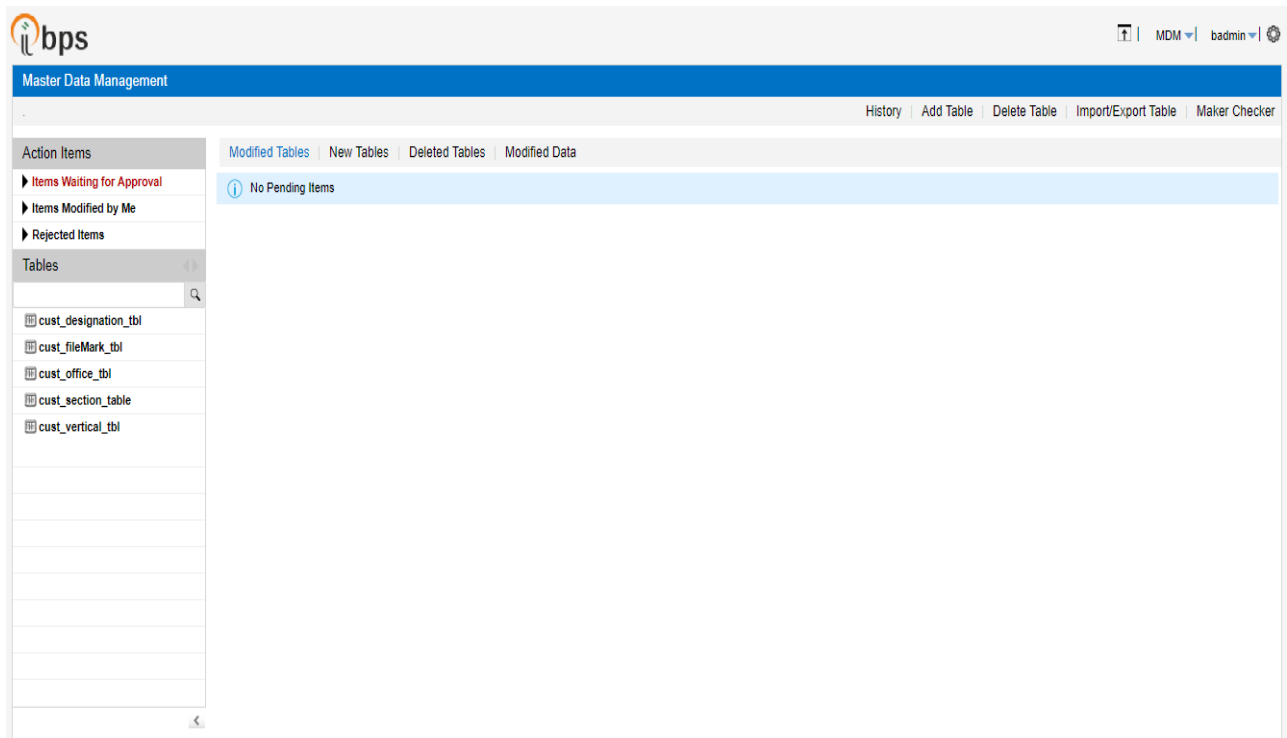
## 12 Creation of Office

The admin can create office in the MDM module of ibps. To create/update office follow the below steps:

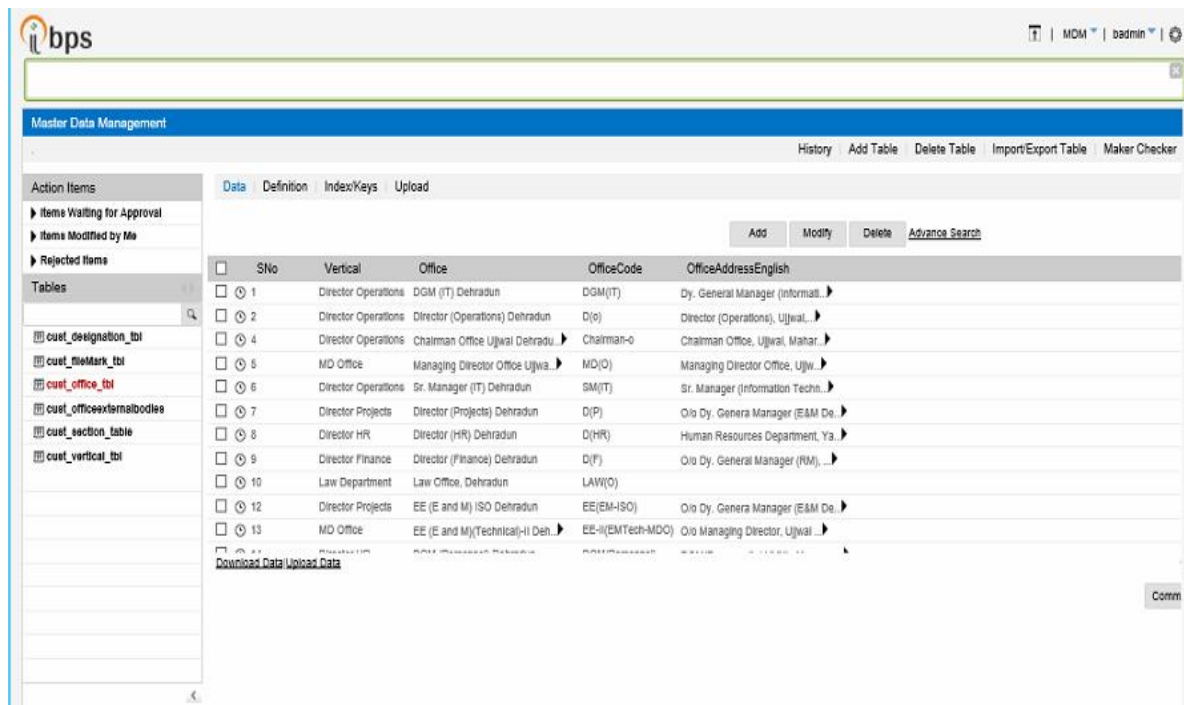
1. Login to ibps using your credentials. Below screen will appear.



- Click on downward arrow next to Business Admin. The options will appear. Click on MDM. Below screen will appear.



- Click on **cst\_office\_tbl** link in the left pane.



4. Click on **Add** to create a new office. A pop up window will appear as shown below.

The screenshot shows the 'Master Data Management' interface. On the left, there's a sidebar with 'Action Items' (Items Waiting for Approval, Items Modified by Me, Rejected Items) and a 'Tables' list including cust\_designation\_tbl, cust\_fileMark\_tbl, cust\_office\_tbl, cust\_section\_table, and cust\_vertical\_tbl. The main area has tabs for 'Data', 'Definition', 'Index/Keys', and 'Upload'. A table lists 11 entries with columns 'SNo' and 'Vertical'. A 'Data Fields' pop-up window is open, showing input fields for 'SNo', 'Vertical', 'Office', 'OfficeCode', and 'OfficeAddressEnglish'. The 'Add' button is visible at the bottom right of the pop-up.

Enter the SNo. , Vertical, Office, OfficeCode and OfficeAddressEnglish data fields and click Add.

5. To modify a particular entry, select the row and click Modify.

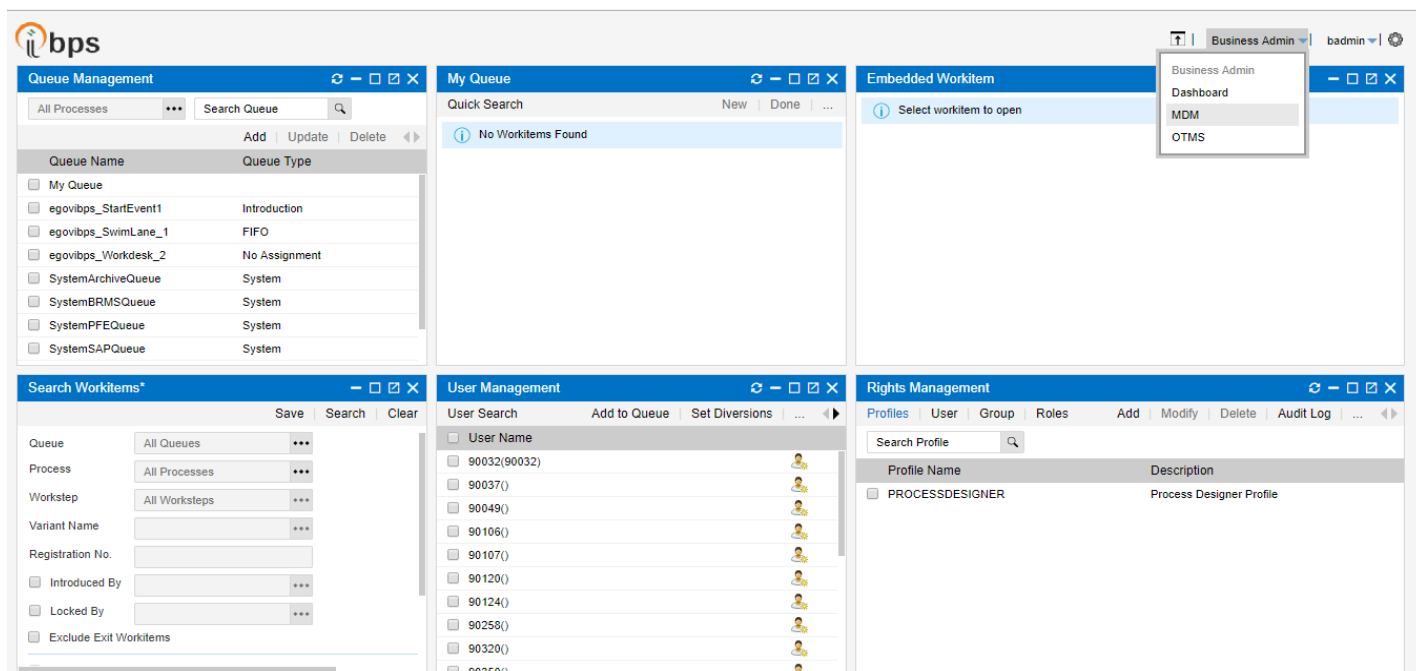
The screenshot shows the 'Master Data Management' interface with the 'Data' tab selected. The table lists 13 entries. A 'Data Fields' pop-up window is open, showing input fields for 'SNo', 'Vertical', 'Office', 'OfficeCode', and 'OfficeAddressEnglish'. The 'Modify' button is visible at the bottom right of the pop-up.

A pop up window will open. User can make required changes and click on **Modify** to update it.

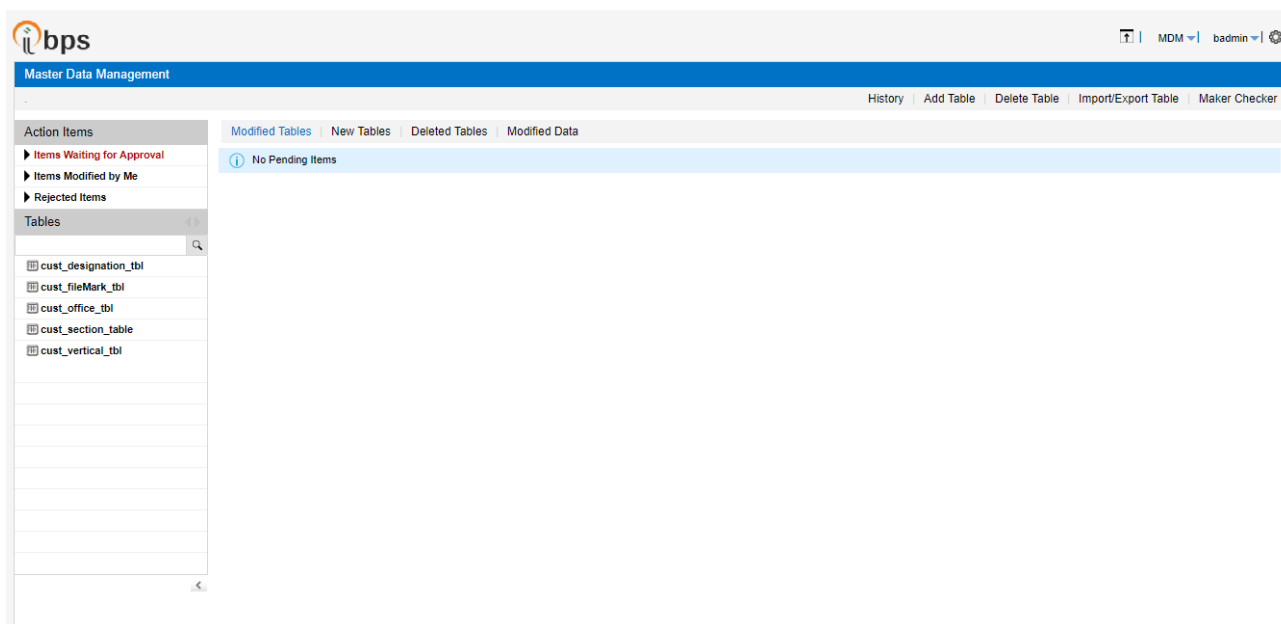
## 13 Creation of File Mark / File Head

The admin can create file marks and file heads in the MDM module of ibps. To create/update them follow the below steps:

1. Login to ibps using your credentials. Below screen will appear.

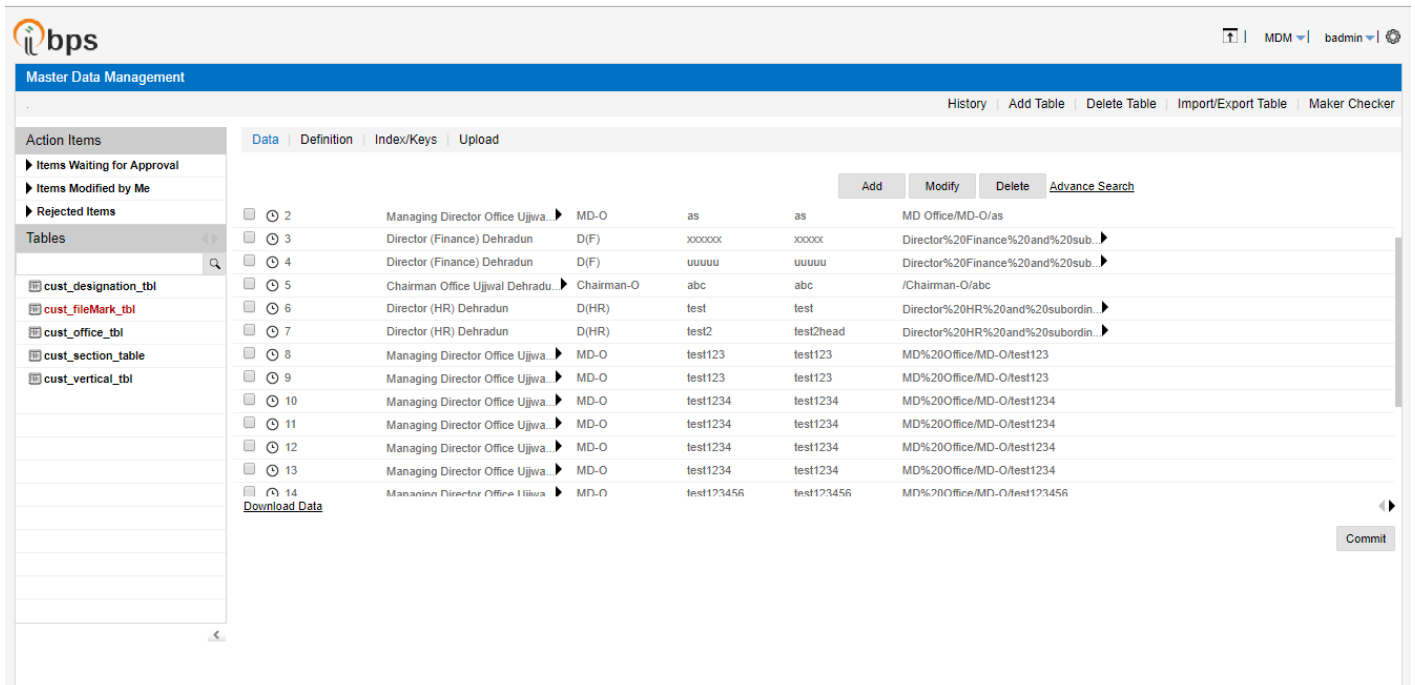


2. Click on downward arrow next to Business Admin. The options will appear. Click on MDM. Below screen will appear.





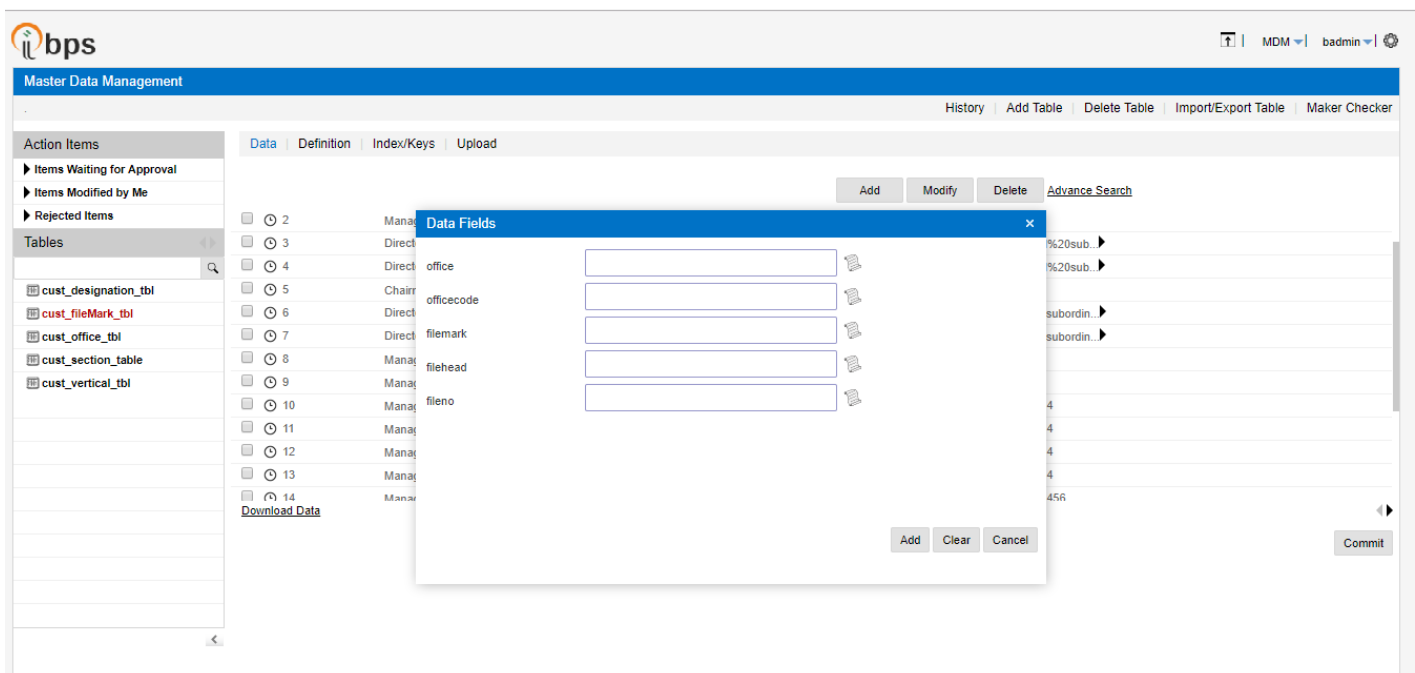
3. Click on **cust\_fileMark\_tbl** link in the left pane.



The screenshot shows the Master Data Management interface. On the left, the 'Tables' list includes 'cust\_fileMark\_tbl'. The main table displays the following data:

ID	Name	Code	Description
2	Managing Director Office Ujjwa...	MD-O	as as MD Office/MD-O/as
3	Director (Finance) Dehradun	D(F)	xxxxxx xxxxx Director%20Finance%20and%20sub...
4	Director (Finance) Dehradun	D(F)	uuuuu uuuuu Director%20Finance%20and%20sub...
5	Chairman Office Ujjwal Dehradu...	Chairman-O	abc abc /Chairman-O/abc
6	Director (HR) Dehradun	D(HR)	test test Director%20HR%20and%20subordin...
7	Director (HR) Dehradun	D(HR)	test2 test2head Director%20HR%20and%20subordin...
8	Managing Director Office Ujjwa...	MD-O	test123 test123 MD%20Office/MD-O/test123
9	Managing Director Office Ujjwa...	MD-O	test123 test123 MD%20Office/MD-O/test123
10	Managing Director Office Ujjwa...	MD-O	test1234 test1234 MD%20Office/MD-O/test1234
11	Managing Director Office Ujjwa...	MD-O	test1234 test1234 MD%20Office/MD-O/test1234
12	Managing Director Office Ujjwa...	MD-O	test1234 test1234 MD%20Office/MD-O/test1234
13	Managing Director Office Ujjwa...	MD-O	test1234 test1234 MD%20Office/MD-O/test1234
14	Managing Director Office Ujjwa...	MD-O	test123456 test123456 MD%20Office/MD-O/test123456

4. Click on **Add** to create a new office. A pop up window will appear as shown below.



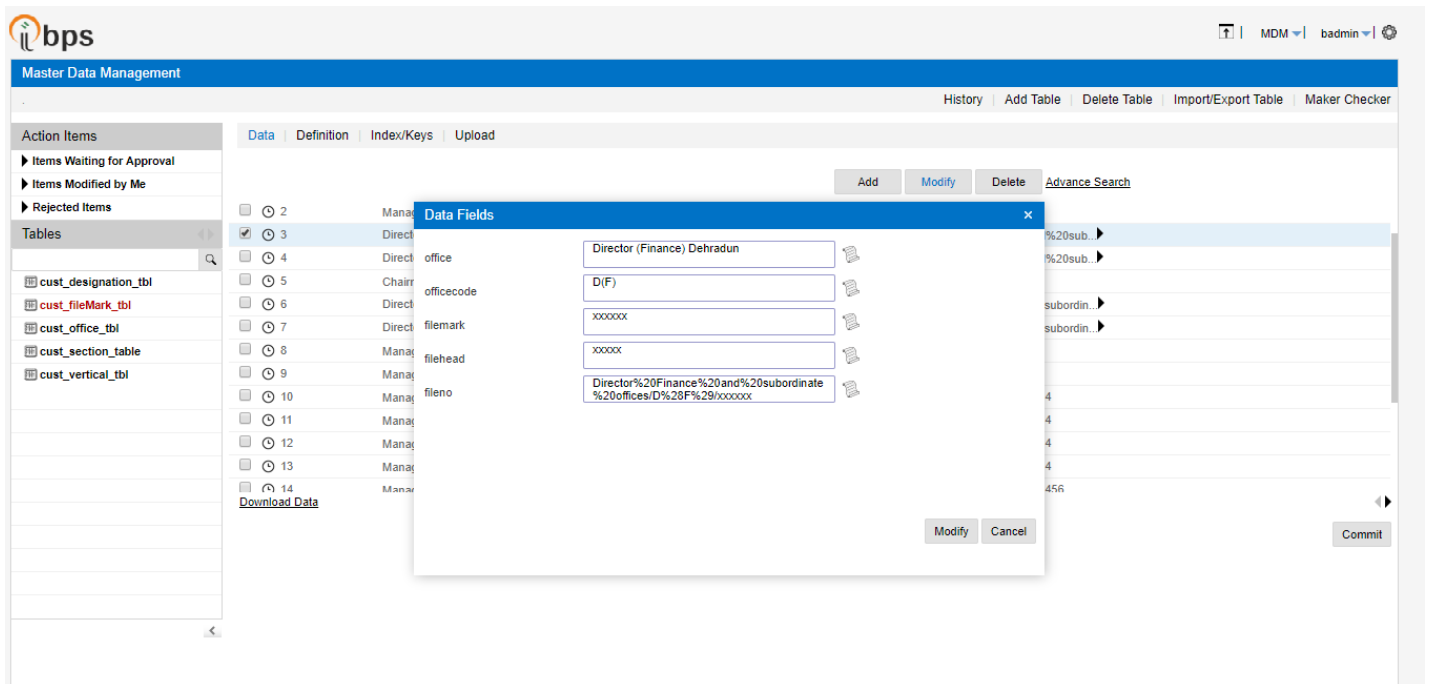
The screenshot shows the Master Data Management interface with the 'Data Fields' pop-up window open. The pop-up contains the following input fields:

- office
- officecode
- filemark
- filehead
- fileno

The 'Add' button is visible at the bottom right of the pop-up window.

Enter the Office, OfficeCode, File Mark, File Head and fileno data fields and click Add.

5. To modify a particular entry, select the row and click Modify.

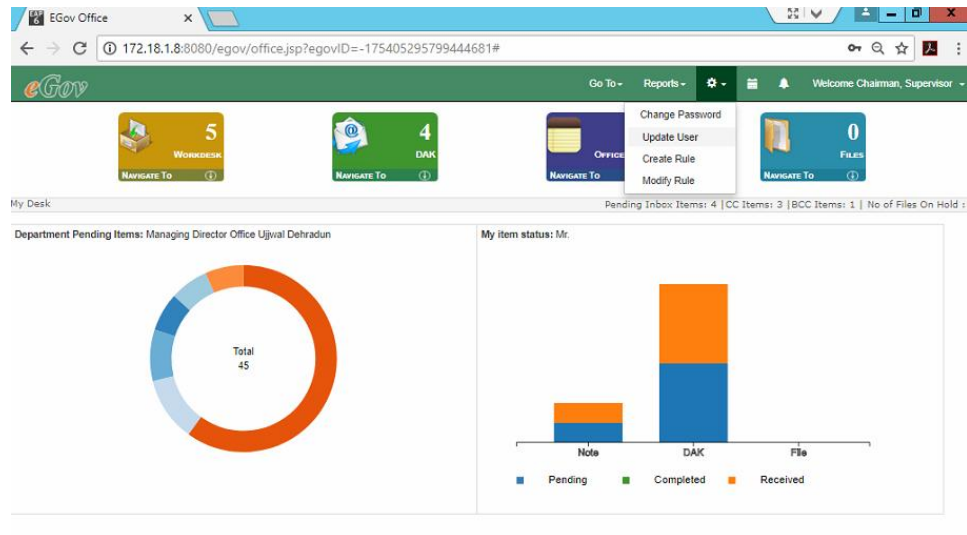


A pop up window will open. User can make required changes and click on **Modify** to update it.

## 14 Update User

The admin/supervisor can update a user from the Update User functionality in eGov.

1. The supervisor needs to click on Settings icon and the click on Update User link.



On clicking Update User, below screen opens.

The screenshot shows the 'Update New User' form in Google Chrome. The browser address bar displays the URL: `172.18.1.8:8080/egov/Customization/custom/add_user.jsp?egovID=-175405295799444681&egovID=-17540529...`. The form is titled 'Update User Information' and contains the following fields and buttons:

- User ID\***: Text input field.
- Department\***: Dropdown menu with '--Select Department--'.
- Designation\***: Dropdown menu with '--Select Designation--'.
- Initials\***: Text input field.
- Buttons**: 'Get User Info', 'Get User Roles', 'Set', 'Update', 'Clear', 'Delete', and 'Close'.

2. The user needs to enter the userid and select the user id from the suggested ids. On selecting the below options will appear.

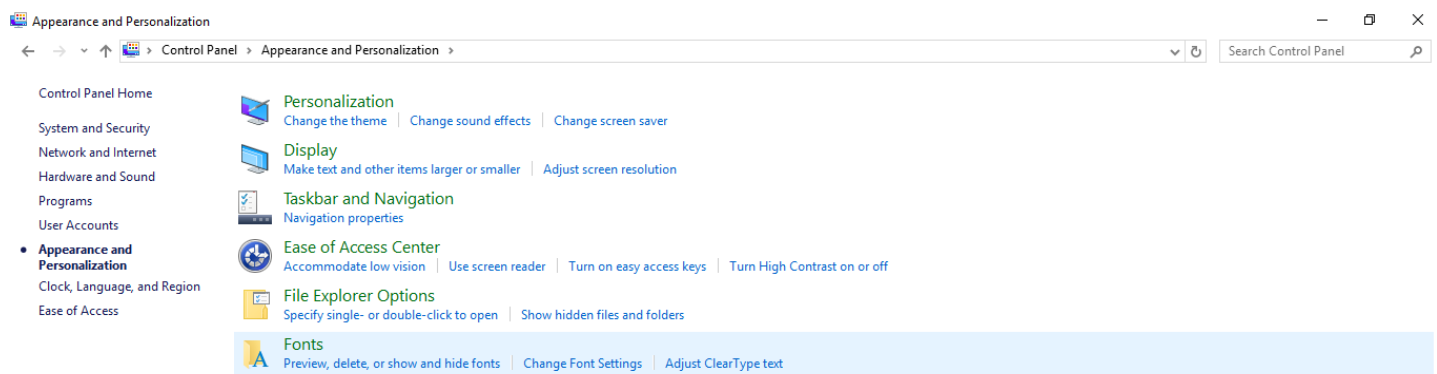
The screenshot shows a web browser window titled 'Update New User - Google Chrome'. The address bar shows a URL starting with '172.18.1.8:8080/egov/Customization/custom/add\_user.jsp?egovID=-7572602114059192724&ego...'. The main content area is a form titled 'Update User Information'. The form has the following fields and buttons:

- User ID\***: Text input field containing '02011'. Buttons: 'Get User Info', 'Get User Roles'.
- Department\***: Dropdown menu showing 'EE (E and M-II) IT Del'. Buttons: 'Set', 'Update'.
- Designation\***: Dropdown menu showing 'Executive Engineer'.
- Initials\***: Text input field containing 'Ms. Tara'.
- Escalation Level1\***: Dropdown menu showing '--Select User--'. Button: 'Set Escalation'.
- Escalation Level2\***: Dropdown menu showing '--Select User--'. Button: 'Set Escalation'.
- Escalation Level3\***: Dropdown menu showing '--Select User--'. Button: 'Set Escalation'.
- Buttons at the bottom**: 'Clear', 'Delete', 'Close'.

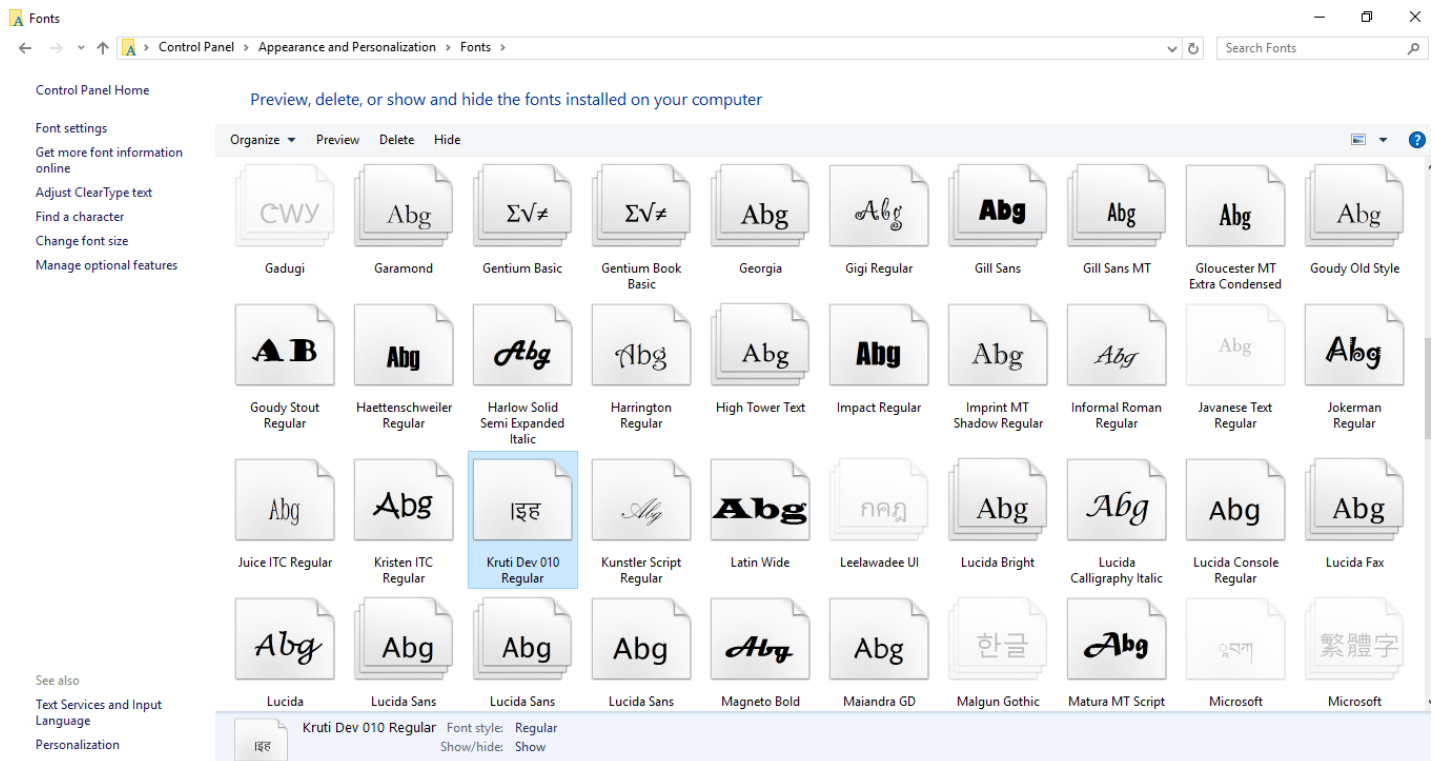
The user can select the Department, Designation, enter initials and set upto 3 levels of escalation.

## 15 Installing Krutidev font (For Hindi Writing)

To install Hindi font, the user needs to go to **Control Panel > Appearance and Personalization > Fonts**



On clicking Fonts, below screen will appear.



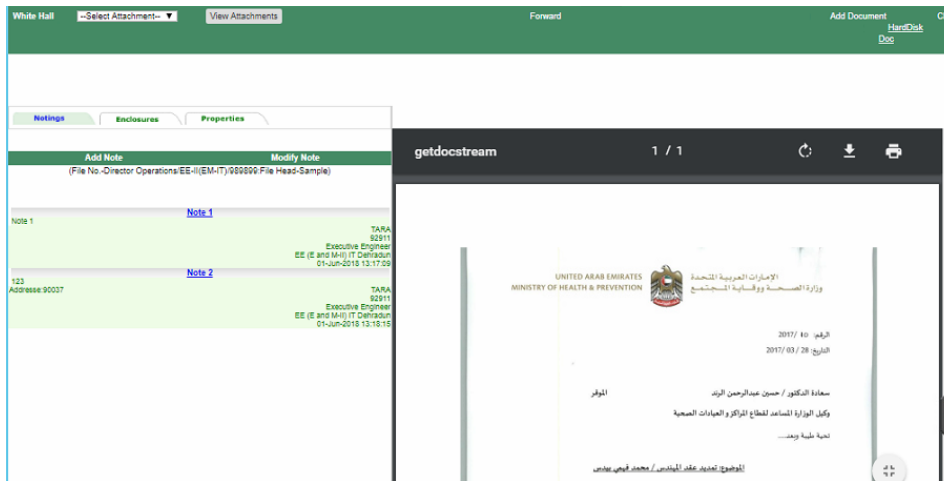
The user needs to copy and paste his/her font here. The font will be installed and the user will be able to type in Hindi in his/her system.

## 16 Knowledge Management

This module will provide the power of knowledge management to user by giving the user the facility to manage & search the existing information from anywhere within the system. This feature is handled through FileMarks. The steps are:

1. The user will create a file marks of his office and will check the option of knowledge management.

- The documents can be uploaded from the hard disk.



- The user can select the "visible to everyone" option while creating a file. The file and its documents can be viewed in search document/file by all the users irrespective of the office that has created it.