



## **Welcome to the Docunym® Document Management System!**

The Docunym® Document Management System is a comprehensive, fully customizable web application focusing on document management and workflow. The system enables the end user to move documents through a variety of configurable workflows, allowing for the tracking and storage of documents in a virtual system.

We support most modern browsers, including Internet Explorer 7+, Firefox 3+, Safari 5+, and Chrome 13+.

The system consists of five tabbed sections: Dashboard, Documents, Acquisition, Reports, Settings.

This document will familiarize you with the basics of creating and modifying documents. For more detailed information on any part of the system, see the full manual:

<https://downloads.docunym.com/UserManual.pdf>

# Acquisition

## Upload

To quickly add documents to your new system, select the Acquisition tab. From here, select the Upload option to add electronic documents from your local file structure. Supported document formats include Microsoft Word and Excel, image formats such as jpeg, tiff, and png, and the Adobe PDF.

Once on the Upload page, you will

1. Specify what kind of document you're adding (Document Image is provided as a simple document type, but you can set up others)
2. Give the document a name that Docunym<sup>®</sup> will use when dealing with the file
3. Specify where the document will go within the Docunym<sup>®</sup> virtual file structure
4. Upload files by clicking "Add...", then find the files you would like to add from within your local file structure. You can add up to 10 documents at a time
5. Create Docunym<sup>®</sup> documents by clicking "Add Documents"

You'll be redirected to the detail for these documents once they have been created

The screenshot shows the Docunym Upload form with the following sections and callouts:

- 1** Document Information: Document Type (dropdown), Document Name (text input), and Autaname based on file name (checkbox).
- 2** Document Name: Text input field.
- 3** Document Location: Virtual File System (tree view).
- 4** Files to Upload: Add... button and a list area.
- 5** Workflow Information: Plan, Queue, and Assigned User dropdowns, and an Add button.
- 5** Add documents (button), Clear Form (button), and Remain on upload form after adding documents (checkbox).

# Documents

Once documents are added to the system, the Documents tab allows users to view and process documents in the system. Users can search, view, and update documents and their index data. The functions of the Documents tab are separated into the Document View Panel and the Sidebar.

## Navigation

To find documents in the system, you can perform a search over key terms on the document

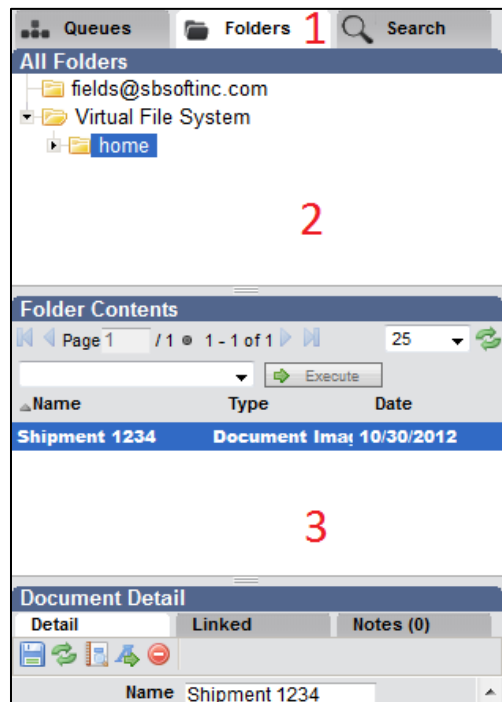
1. Go to the Search function of the Documents tab
2. Enter your search terms and hit Search
3. From the Search Results panel, click on your document
4. The index data for the document will appear in the Document Detail panel at the bottom left
  - Here is where you can update values and view the history of the document
5. The image for your document will appear in the document view panel to the right
  - Here is where you can add annotations to your image, or export the image data

The screenshot displays the DocuSign interface with several panels. On the left, the 'Search Methods' panel has a search box containing 'shipment' and a 'Search' button. Below it, the 'Search Results' panel shows a table with one entry: 'Shipment 1234' with a 'Document I...' icon and a date of '10/30/2012'. The 'Document Detail' panel at the bottom left shows fields for 'Name' (Shipment 1234), 'Type' (Document Image), 'Document Description', 'Document Location' (/home/), 'Document Id' (1000003), and 'Created' (10/30/2012). The main document view panel on the right displays the document title '5 Sit Right Down Furniture Solutions' and contact information: '678 Industrial Pkwy, Cityburg, XY, Phone (987) 555-6543'. Below this, order details are listed: 'Order Date: May 14, 2004', 'Order Number: 34567', 'Purchase Order: PO3421-90837-01', 'Ship To: Fly By Night Investments, 123 Easy Street, Townsville, XY 55555', and 'Bill To:'. At the bottom, a table lists items with columns 'Part #', 'Description', and 'Unit Typ'.

Part #	Description	Unit Typ
23A7-D892	12 ft Conference table	Each
390D1-J349	Swivel Conference Chair	Each
208R4-Q289	Sideboard	Each

If you know which folder you left your document in, you can navigate to it directly

1. Go to the Folders function of the documents tab
2. Click through the folder tree
3. From the Folder Contents panel, click on your document



# Settings

## Document

To create more useful document classification, you can quickly create new document types

1. From the “Document” section of the Admin Console navigation, select “Document Type”
2. Add a new document type by first clicking “Create”
3. Give your new document type a name, like “Invoice”
4. Click “Save”

To add more contextual data to your documents, you can create new document indexes

1. From the Admin Console’s navigation under “Document”, select “Common Index Fields”. You can create types of index data, and add them to document types
2. Add a new common index field by first clicking “Create”
3. Give your field a name
4. Specify what kind of data will be in this field. Most data will be free-form text, which corresponds to a field type of “String”, but more specific data types are supported, such as numeric and date values
5. Click “Save”

To add this new common field to the document type

1. Select “Document Type Fields” from the navigation panel
2. Select the document type that you’d like to work with
3. Click “Create”
4. From the “Common Field Type” drop-down, find the field you’d like to add
5. Click “Save”

**Admin Console**

- User Information
- Downloads
- External Services
- System Configuration
- Users/Groups
- Security Group Permissions
- Document
  - Document Types
  - Common Index Fields
  - 1 Document Type Fields
  - Standard Fields
  - Lookup Tables
- Workflow
- About

### Document Type Fields

Document Type: Invoice **2**

Field Name	Common Field Type	Default Value	Required
Invoice Number	Invoice Number		<input checked="" type="checkbox"/>

Field Name: Invoice Number, Common Field Type: Invoice Number, Required: , Default Value:

Apply default value to existing records:

**3** Create **4** Delete selected item **5** Edit Save Cancel

After saving, click [here](#) to set document- and field-level permissions.

After adding new document types and indexes, make sure to set the appropriate permissions on these.

## Security

You can fine-tune the access of different users within the Docunym<sup>®</sup> system

1. From the “Users/Groups” section of the Admin Console navigation, select “User Setup”
2. Click “Create”
3. Provide a valid e-mail address and a name
4. Give them a starting password (they will need to change it after logging in for the first time, for added security)
5. Click “Save”

**Admin Console**

- User Information
- Downloads
- ▶ External Services
- ▶ System Configuration
- ▼ Users/Groups
  - Login Restrictions
  - Active User Sessions
  - 1** User Setup
  - Group Setup
- ▶ Security Group Permissions
- ▶ Document
- Workflow
- About

**User Setup**

User Name  
Fields, Steven M (fields@sbssoftinc.com)

**User Detail**  
NOTE: Login name must be an e-mail address

Login name grover@sbssoftinc.com  
First name Adam  
Middle Initial P  
Last name Grover  
Active

Please provide an initial password for this user. This password will be sent to them via email along with confirmation of the setup and a link to the login page. The user will be required to modify this password upon initial login.

Password  
Confirm Password  
IP address

Create Edit Delete

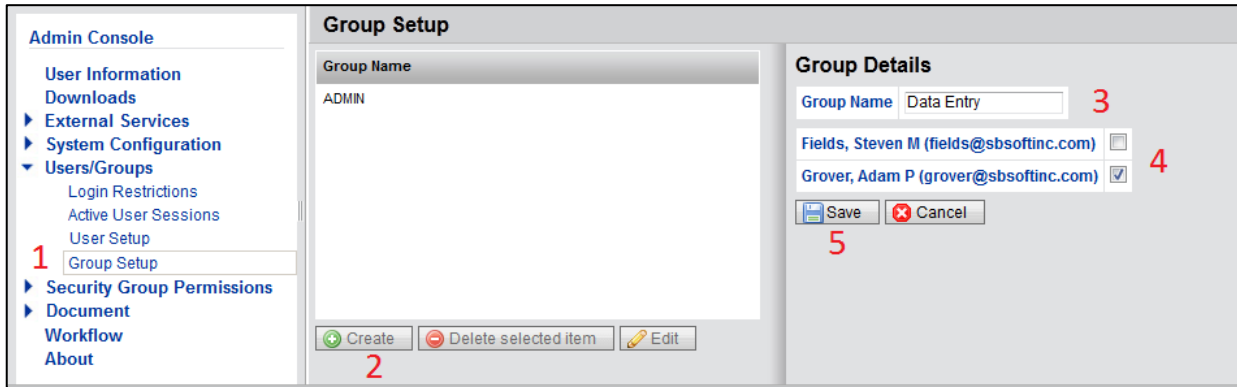
ADMIN

Save Cancel

2 3 4 5

Users must be in security groups in the system, and these groups drive what components in the system users are able to view

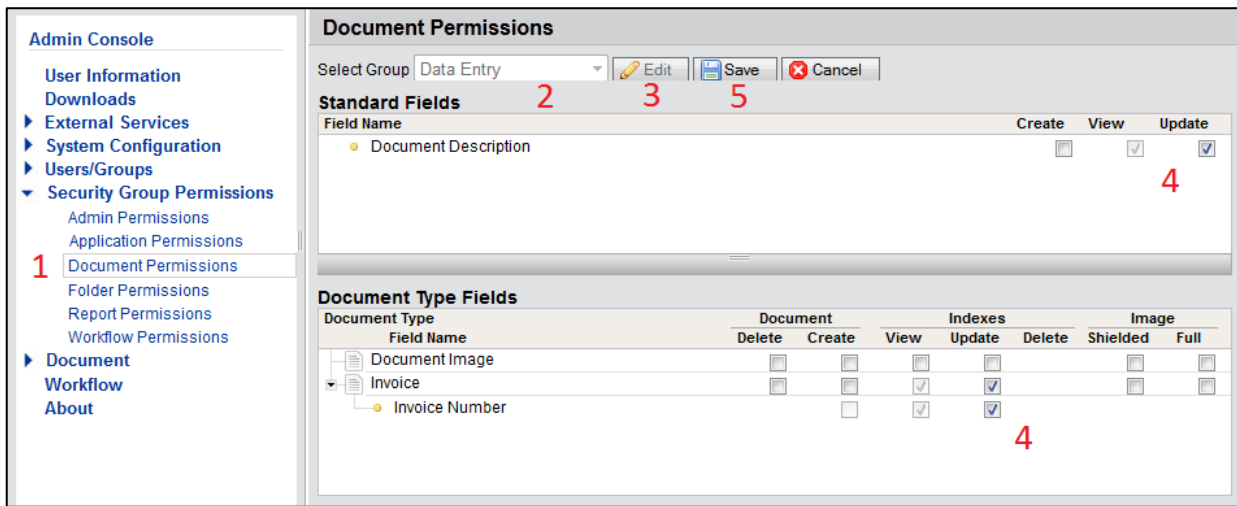
1. To create a new group, navigate to “Group Setup”
2. Click “Create”
3. Specify a name for the group
4. Specify which users should be in the group
5. Click “Save”



Finally, give the groups permissions to Docunym<sup>®</sup> systems. From the “Security Group Permissions” section of the Admin Console navigation, you can specify permissions for users in different capacities.

To give your new group permissions on your new document type

1. Go to Document Permissions
2. Select the group you'd like to change permissions for
3. Click “Edit”
4. Specify what level of permission the group should have for each document type
5. Click “Save”



You can modify permissions for groups for a number of other arenas. This customizes the Docunym<sup>®</sup> experience for all levels of access to the system

- Admin Permissions – This lets users in the group set up document types and change permissions for other users in the system. Most groups won't need these permissions
- Application Permissions – This drives every day functions within the system, such as adding documents, searching for documents, and exporting document images. You'll probably want most groups to have this permission
- Folder Permissions – In addition to document type permissions, groups should have permissions on a document's folder to view it or make changes to it