NewgenONE OmniDocs RMS

User Guide

Version: 5.0

Disclaimer

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Preface

This chapter provides information about revision history, the purpose of this guide, details on the intended audience, related documents, and documentation feedback for the *NewgenONE OmniDocs RMS 5.0 User Guide*.

Revision history

Revision date	Description
January 2025	Initial publication

About this guide

This user guide explains creating and managing records in NewgenONE OmniDocs RMS.

The NewgenONE OmniDocs RMS 5.0 product documentation is available at the following locations:

- Newgen Internal Doc Portal – For Newgen employees
- Newgen Partner Portal – For Newgen partner

Intended audience

This user guide is intended for users who are seeking information on how the various features of RMS function. The reader must have basic knowledge of RMS and all the functional rights to perform available operations in RMS.

Related documents

The following documents are related to the *NewgenONE OmniDocs RMS 5.0 User Guide*:

- *NewgenONE OmniDocs RMS 5.0 Release Notes*
- *NewgenONE OmniDocs RMS 5.0 Administration Guide*.
- *NewgenONE OmniDocs RMS 5.0 Installation Guide*

Documentation feedback

To provide feedback or any improvement suggestions on technical documentation, write an email to docs.feedback@newgensoft.com.

To help capture your feedback effectively, share the following information in your email:

- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

Introduction

A Record Management System (RMS) is an application that handles the complete life cycle of physical as well as electronic records. It manages physical and electronic records through various stages such as creation, usage, storage, and maintenance to eventual destruction or permanent preservation while retaining the integrity, authenticity, and accessibility of the records. RMS is certified by DoD, ISO 15489, ISO 16175 - 1, and ISO 16175 - 2.

The major features of RMS include:

- Tracking of electronic and non-electronic records.
- Request and transfer of records in Records Management Application (RMA).
- Functional security for sharing or transferring records.
- Granular search for records, record folders, and record categories.
- Disposition policies for records and record folders.
- Archiving emails and associated attachments as records.
- Supports user-configurable search outputs and desktop settings.
- System-defined reports for planning and analysis.
- Phase-based transfer of records from one location to another.
- Create renditions from PDF to TIFF.
- Create linked copies of the record to ensure the authenticity of the original document is not disturbed.
- Provides a dashboard with easy tracking and access to frequently used tasks.
- Integration of the Ask Marvin feature to provide AI-powered assistance for managing records effectively.
- Manage legal holds to ensure compliance with clear definitions, user interfaces, and audit logs.
- Limit the depth of subclass hierarchies for improved record management by administrators.
- Replace the OD-RMS switch button with a dropdown for a more streamlined interface.
- Configure whether to allow uploading records with the same name in a file or file part.
- View U-type data directly in user profiles for easier access.

- Prevent the addition of duplicate rendition types to eliminate redundancy.
- Selectively print specific columns from lists for better control over printed content.

RMS allows organizations to classify paper content as records, as well as electronic documents, audio and video files, email, scanned images, and web pages. It creates a consistent central information management system and effectively minimizes the risk of unmanaged information and content.

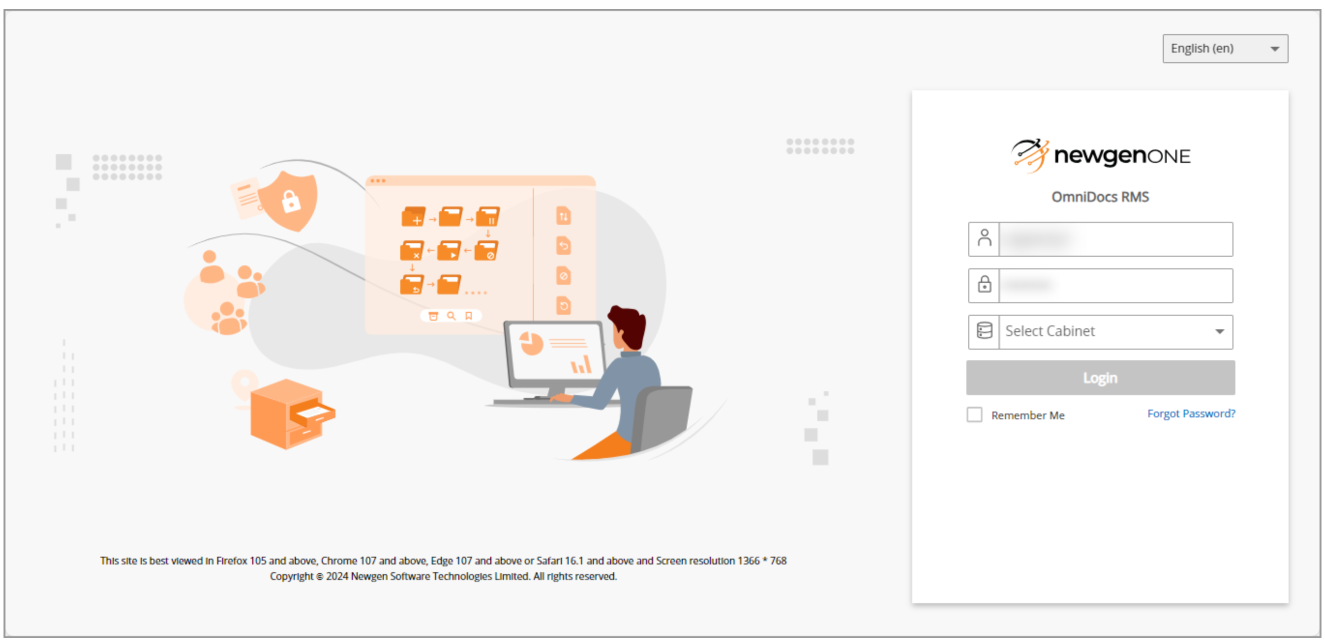
Getting started

This chapter describes how to get started with NewgenONE OmniDocs RMS.

Signing in to RMS Web

To sign in to NewgenONE OmniDocs RMS, perform the below steps:

1. Launch a web browser.
2. Enter the URL of NewgenONE OmniDocs RMS and press Enter. The URL format is:
   http://<Address of Application Server>/rms/admin
   The screen to sign in to NewgenONE OmniDocs RMS appears.
3. (Optional) To change the locale, select the required option from the locale dropdown list. You can set the locale to English or Arabic based on your business requirements. By default, the locale is set to English.



Switching the locale to Arabic alters the writing format from left-to-right to right-to-left.

4. Enter the following credentials:

Fields	Description
Username	The username of NewgenONE OmniDocs RMS.
Password	The password of the above user.
Select Cabinet	This field allows you to select a required cabinet to make a connection with RMS. This field appears only if there are multiple cabinets available to select.
Captcha	Enter the captcha. The captcha information does not appear if it is disabled by the administrator. In case the captcha is not clear to you, click the Refresh icon to get a new captcha. You can also listen to the captcha by clicking the Speaker icon.
Remember Me	Select the **Remember Me** checkbox to allow the system to remember your Username and Cabinet for the future. If selected, the Username and Cabinet will be pre-selected at the time of the next sign-in. You just have to specify the password.

5. Click **Login** to start the session.
   If Two-Step Authentication is enabled, then follow the below steps to continue the login process:

   > Members of the Second Factor Immune group are not required to pass through the two-factor authentication even if Two Factor Authentication is enabled.

a. Enter your login credentials in the RMS sign-in screen and click **Login**. The Two-Step Authentication screen appears.
b. Enter the **OTP** received on your registered contact number or click the **Resend OTP** link if you have not received the OTP.
c. Click **Login**.
   - If the entered OTP is correct, the NewgenONE OmniDocs RMS home screen appears.
   - If the entered OTP is incorrect, then re-enter the OTP.
     - Enter the correct OTP and then click **Login** again.
     - The maximum number of chances that you will get to re-enter the OTP can be decided by the client. In case the maximum limit is reached, a notification appears.

> Message for incorrect OTP can be customized as per the requirement.

On successful sign-in, the NewgenONE OmniDocs RMS home screen appears. If you are not able to sign in, then it may be due to the following reasons:

Fields	Description
User already logged-in	In case you have already signed in, on some other machine, a dialog “The specified user is already logged in on some other machine. Do you want to disconnect and log in again?” appears. To continue, click **Login**.
Invalid login Information	The notification “Invalid username or password” appears if the entered login credentials are incorrect. Also, if you fail to provide correct sign-in credentials for the maximum number of allowed attempts, then your account is locked. The OmniDocs Administrator, Supervisor, or a member of the Supervisor Group can unlock such an account. Once your account is deleted from an OmniDocs cabinet, it cannot be re-registered for that cabinet.
Forgot password	Click the Forgot Password? link to learn how to reset your forgotten password. Forgot password option is configurable, whether it has to be shown on UI (User Interface) or not.

To switch to the NewgenONE OmniDocs, click the dropdown in the top pane and select OmniDocs.

Resetting password

To reset your forgotten password, perform the below steps:

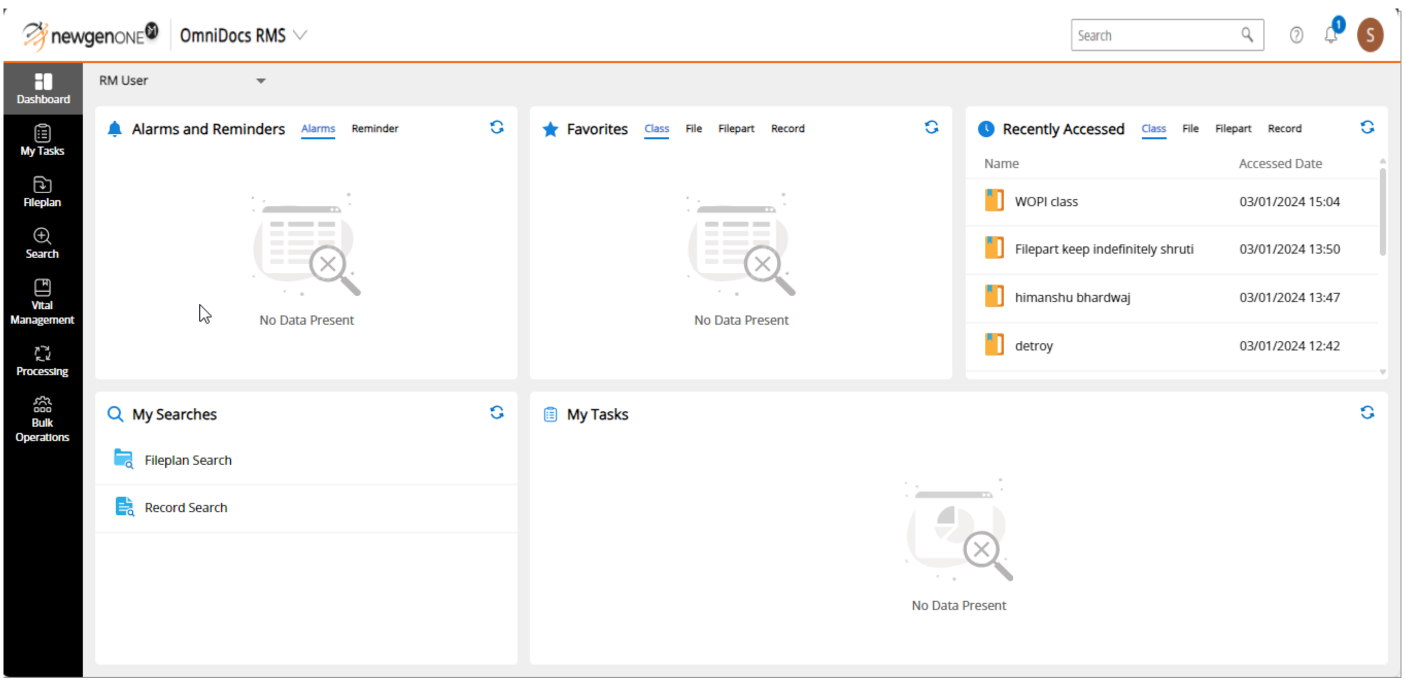
1. Click **Forgot Password?** link. The Forgot Password dialog appears.
2. Specify the following fields:

Fields	Description
Username	Enter your username.
Email	Enter the email ID used to create your account.
Select Cabinet	Select the cabinet. This field appears if there are multiple cabinets available to select.

3. Click **Get Reset Link**. The message “Forgot password request sent successfully, please check your mail” appears.
4. Open your registered email and follow the instructions given in that email to reset your password.

Exploring NewgenONE OmniDocs RMS interface

On successful sign-in, the NewgenONE OmniDocs RMS, home screen appears. Using the menu bar displayed on the left pane, you can access the different tabs of NewgenONE OmniDocs RMS, to perform the required operations.



The menu bar includes the following tabs:

- Dashboard
- My Tasks
- Fileplan
- Search
- Vital Record
- Processing
- Bulk Operations

- Hold Management

Rearranging tabs in the menu bar

You can rearrange the tabs visible in the menu bar, as well as any added custom modules or clusters, according to your preference.

To reorder the tabs and custom elements in the menu bar, perform the below steps:

1. In the menu bar, click and hold on to the tab or element using your mouse.
2. While still holding the mouse button, drag the tab to the required position within the menu bar.
3. Release the mouse button to drop the tab in its new position. A message "Tab preference modified successfully" is displayed.

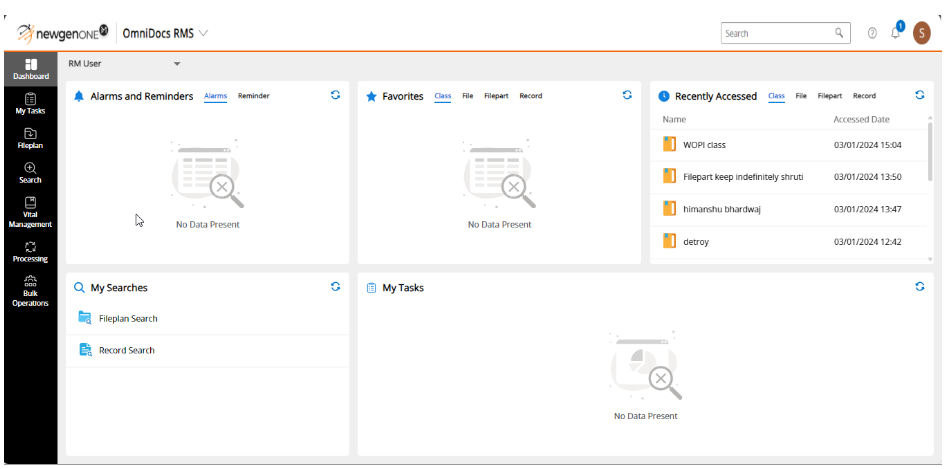
Dashboard

The dashboard in NewgenONE OmniDocs RMS allows you to view and access frequently used tasks. You can view only those dashboards on which you have access rights. With the help of dashboard settings, you can select the default dashboard out of the available ones. You can also change the dashboard view.

The administrator provides the rights on the dashboards and based on those rights you can see the dashboard in the NewgenONE OmniDocs RMS module. In case, you have rights on multiple dashboards, you can view the default dashboard in alphabetical order. In case there are no rights available on multiple dashboards, then you can only be able to see the RMS-specific persona dashboard.

To access the dashboard, click the **Dashboard** tab from the menu bar of the NewgenONE OmniDocs RMS home screen. The Dashboard screen appears in the right pane.

The administrator sets the view of the dashboard that appears when you sign in to the NewgenONE OmniDocs RMS for the first time. Using the Dashboard Designer in the OmniDocs Admin module, the administrator configures the shortcuts for various operations that are displayed on the dashboard.
If you have access to different dashboard views, you can select another dashboard view using the dropdown list displayed in the top-right corner.



By default, the following dashboards are provided with NewgenONE OmniDocs RMS:

- Record Manager
- RM User

The dashboard screen may include the following widgets:

- **Alarms and Reminders** – This widget shows all the notifications in the form of alarms and reminders which can be dismissed from the widget itself.
- **My Tasks** – This widget displays the list of all incoming and outgoing requests.
- **Profile** – This widget allows you to view your basic profile information. You can view details like user ID, full name, last name, and email ID. This widget also gives details like password expiry and last login details. You can configure the profile settings and change the password through this widget.
- **Vital Management** – This widget displays the list of files, fileparts, and records that are essential for the organization.
- **Pending Disposition** – This widget displays the list of the disposition items that are pending.
- **Recently Accessed** – This widget displays the list of recently accessed classes, files, fileparts, and records with the date and time information.
- **Favorites** – You can mark the classes, files, filepart, and records as favorites from the fileplan repository by clicking the **Mark Favorite** ☆ icon. This widget represents the list of items marked as favorites.
- **My Searches** – Using this widget, you can view search configurations and saved searches on which you have rights.

My Tasks

My Tasks displays the items and requests that are sent and received for approval.

For example, James is a user of RMS and he requires certain records or boxes for a referral. He generates a Request Note for the required records or boxes to the administrator or the current borrower of those records or boxes. The request appears in the Outgoing Requests list of James. The request for a record gets enlisted under Record Requests and the request for a box gets enlisted under Box Requests.

The administrator or current borrower can view the list of requested records or boxes in his Incoming Requests. The request for records gets enlisted under Record Requests and the request for boxes gets enlisted under Box Requests. He has two options – ‘Grant the request’ or ‘Reject the request’. If the request is rejected, then he mentions the reason for rejection to James, and the transaction stops.

If the request is granted, then it requires generating a Transfer Note for the records or boxes. If the transfer note is generated but the records or boxes are not dispatched immediately, then it appears in the Pending Transfer Notes list of Pending Tray. If dispatched, then the requested items are sent to James. James can view the granted records or boxes in his Incoming Items queue.

James can either receive the records or boxes or reject them. If he rejects them, then he can mention the reasons for rejecting the records or boxes. If he accepts the records, fileparts, or boxes, he can view them in the Items with Me queue, in Pending Tray.

The records or boxes can be returned to the administrator or can be forwarded to another user for a referral. If the records or boxes are sent for the referral, the same cycle is followed otherwise, James generates the transfer note for returning the records or boxes.

To access My Tasks, click **My Tasks** given on the navigation panel. The My Tasks tray appears containing Items and Requests. The lists of Items and Requests shown here are configured by the RMS Admin. Depending on the configuration, the items and requests show the following:

- Incoming Items
- Items with Me
- Items Transferred
- Incoming Request
- Outgoing Request

Items

The Items tab contains the following process:

- Incoming Items
- Items with Me
- Items Transferred

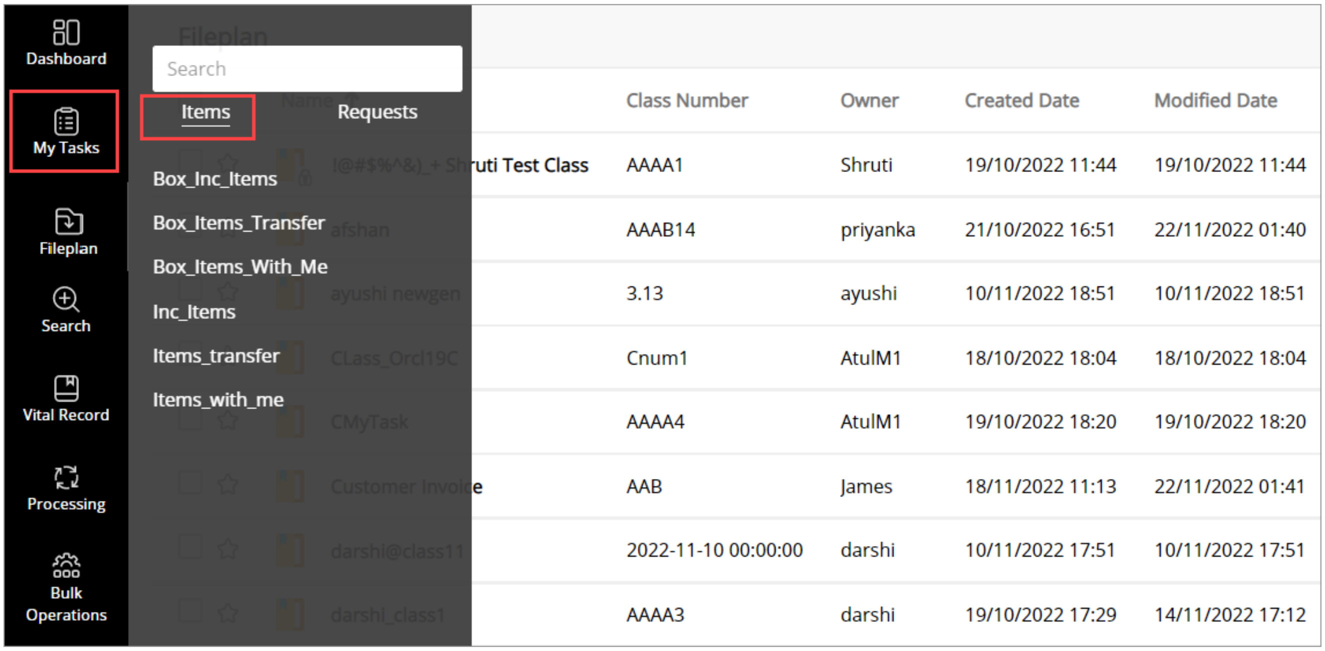
Incoming items

It displays the list of items that came for your approval. You can either approve the items or reject them.

For example, if the listed records or boxes are illegible or destroyed, they can be rejected. In case, you approve the items, the records or boxes move from this queue to the Items With Me list. If you reject the items, then you generate a transfer note to return the records or boxes to the sender.

To view the Incoming Items, perform the below steps:

1. Go to **My Tasks**.
2. Go to **Items** and click the configuration created for Incoming Items. To view incoming boxes, select the configuration created for incoming boxes. The Incoming Items screen appears.



Incoming items contain the list of your incoming records along with rejected, forwarded, or requested incoming records.

To approve incoming items, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific item.
2. Select **Receive**. The Receive dialog appears.
3. Select the **Put In RMU** checkbox. The RMU receives the selected item.
4. Click **Receive**. The message "Items Received Successfully" appears.

To reject incoming items, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific item.
2. Select **Reject**. The Reject dialog appears.
3. Specify the following fields:

Fields	Description
Dispatch ID	Enter the dispatch ID.
Dispatch Date	Select the dispatch date using the date picker.
Reason	Specify the reason for rejecting the item.

4. Click **Reject**. The message "Items Rejected Successfully" message appears. The rejected item appears in the incoming items of the sender.

Items with me

Items with Me contains a list of all the items for which you are the borrower. It allows you to Generate Transfer Note or Return the item.

To view the Incoming Items, perform the below steps:

1. Go to **My Tasks**.
2. Go to **Items** and click the configuration created for Items with Me.

To generate a transfer note, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific item that requires your approval.
2. Select **Generate Transfer Note**. The Generate Transfer Note dialog appears.
3. Specify the following details:

Fields	Description
Dispatch ID	Enter the ID associated with the request.
Dispatch Date	Select the dispatch date for the required item.
Item Name	Enter the name of the requested item.
Requester Name	Name of the person who has requested the item.
Courier Details	Details of the courier through which the requested item is dispatched.
Return Date	Date of return of the required item.
Owner Name	Owner Name of the requested record or the file.

To take a print of the transfer note, click the **Print** icon given on the upper-right panel.

4. Click **Send** to send the transfer note. The message "Object(s) Dispatched Successfully" appears.

   On completion of dispatch, a receipt of the dispatched object is displayed. You can take a print for reference.

To return an item, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific item that you want to return.
2. Click **Return**. The Return dialog appears.
3. Specify the required details. Click here for reference.

   Fields marked with * are mandatory.
4. Click **Send** to return the item. The message "Object(s) Dispatched Successfully" appears.

Items transferred

The Items Transferred displays the list of transferred items by you. It requires no further action on the transferred items. An item transfer takes place due to the following reasons:

- Returning a requested item.
- Transferring the item to a user who has requested it.

To view the transferred items, perform the below steps:

1. Go to **My Tasks**.
2. Go to **Items** and click the configuration created for Items Transferred. The screen of the respective configuration appears. It allows you to view the different statuses of the items that you have transferred. The different statuses are as follows:
   - Pending
   - Rejected
   - Received
   - Forwarded
   - Generate Transfer Note

Requests

The Requests tab contains the following process:

- Incoming Request
- Outgoing Request

Incoming requests

Incoming Requests contains a list of all requests that are raised to you. You can approve or reject these requests.

The Incoming Requests have the following categories:

- Requests for File
- Request for Filepart
- Request for Record
- Requests for Box

Requests for file, filepart, and record contain the list of file, filepart, and record for which you have made the requests. Also, the Box requests contain the list of boxes for which you have made the requests and allow you to perform the following actions:

- **Grant the request** — By generating the transfer note, grant the request of the other user and send the item to another person. You can select one or more requests which you want to transfer and then generate a transfer note. All the selected requests must be added to the Transfer Note.
- **Reject the request** — Select one or more requests and reject them.

To view the incoming requests, perform the below steps:

1. Go to **My Tasks**.
2. Go to **Items** and click the configuration created for Incoming Requests. The Incoming box requests screen appears.

To generate a transfer note, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific item.
2. Select **Generate Transfer Note**. The Generate Transfer Note dialog appears.
3. To generate a transfer note for multiple requests, select the required request and then select the **Generate Transfer Note**.

   In case of multiple selections of requests, ensure that the same person requests all incoming requests.
4. Specify the following details:

Fields	Description
Dispatch ID	Enter the ID associated with the request.

Fields	Description
Dispatch Date	Select the dispatch date for the required item.
Item Name	Enter the name of the requested item.
Requester Name	Name of the person who has requested the item.
Courier Details	Details of the courier through which the requested item is dispatched.
Return Date	Date of return of the required item.
Owner Name	Owner name of the requested record or the file.

5. To take a print of the Transfer Note, click the **Print** icon given on the upper-right panel.

   Fields marked with * are mandatory.
6. Click **Send**. The message "Object(s) Dispatched Successfully" appears.

To reject a request, perform the below steps:

1. Click the **Actions** icon against a specific item.
2. Select **Reject**.
3. To reject multiple requests, select the checkboxes against required requests and click **Reject**. The Reject dialog appears.
4. Click **Send**. The message "Item(s) Rejected Successfully" appears.

Outgoing requests

The Outgoing Requests displays a list of requests that you have raised to borrow the items. The following statuses might appear against the outgoing requests:

- **Pending** — An assigned user has not worked on the requested item.
- **Granted** — An assigned user has granted the request. Further, it moves to the incoming records or boxes queue.
- **Rejected** — The item request has been rejected.
- **Dispatched** — You have generated a transfer note after receiving the item.

When a request is granted or rejected, its status gets changed from Pending to Granted or Rejected.

To view the incoming requests, perform the below steps:

1. Go to **My Tasks**.
2. Go to **Items** and click the configuration created for Outgoing Requests. The Outgoing box requests screen appears.

   Depending on the status of the requests, perform the following actions:

Status	Actions
Pending	Remind or Delete
Granted	No action can be taken.
Rejected	Re-request or Delete
Dispatched	No action can be taken.

To set a reminder for pending requests, perform the below steps.

1. Click the **Actions** ⋮ icon against a specific item.
2. Select **Remind**. The Remind dialog appears.
3. Specify the following details:

Fields	Description
Recipient User	Displays the name of the recipient user. The recipient user is the location administrator where the item is sent.
Dispatch ID	Enter the Dispatch ID.

Fields marked with * are mandatory.

4. Click **Send**. The message "Reminder Added Successfully" message appears.

To delete an outgoing request, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific item.
2. Select **Delete**. The message "Outgoing Request(s) Deleted Successfully" appears.

To re-request an outgoing request, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific item.
2. Select **Re Request**. The Re Request dialog appears. For the remaining steps, refer to step 2 to step 4 of the Requesting record section.

Fileplan

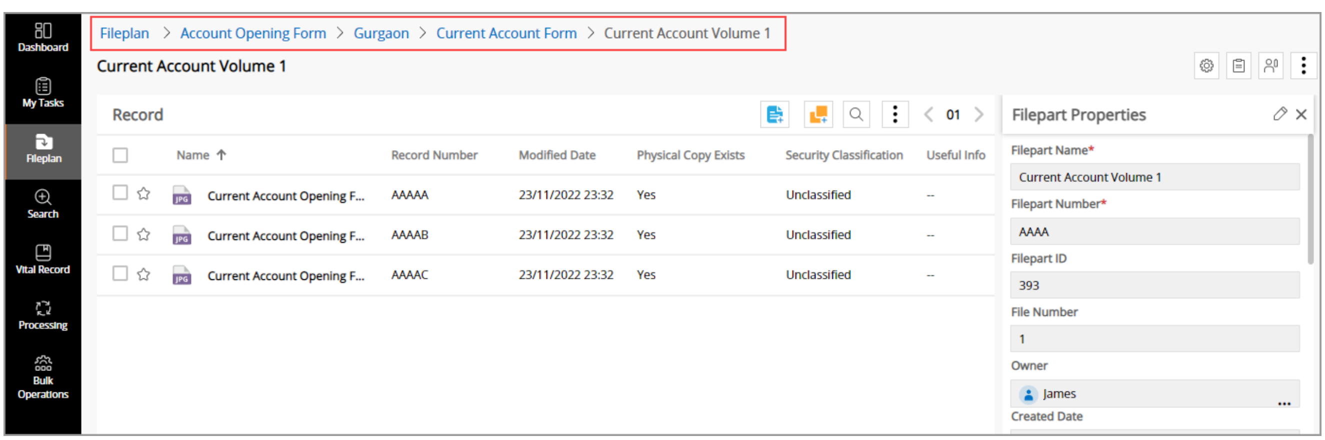
The Fileplan is the repository where records are organized in a hierarchy of classes, subclasses, files, and fileparts. Such a record archival mechanism offers a unified view of the record repository and simplifies the physical record retrieval process. It allows you to set multiple levels of access rights on class, subclass, file, and filepart.

To access and manage the fileplan, perform the below steps:

1. Click the **Fileplan** tab of the menu bar. The Fileplan screen appears. It displays a list of all the classes created at the root level.

    - You can change the view of the classes by clicking the List View or Grid View icon as needed.
    - You can also personalize your default view using the User Preference feature.

2. The top bar of the screen gives the hierarchy of the fileplan in breadcrumb for easy navigation. Click the breadcrumb trail to jump directly to a parent object.
   For example, if you are at Current Account Volume 1 in a hierarchy of Fileplan > Account Opening Form > Gurgaon > Current Account Form > Current Account Volume 1, you can click Account Opening Form to go directly to the Account Opening Form class from Current Account Volume 1 filepart.



To expand or collapse the view of the Sub Class, File, Filepart, or Record pane, click the **Expand** icon or **Collapse** icon that appears on the operation bar on their respective pane. The expand or collapse icon appears only if there is an item present in a pane.

If any pane inside the fileplan is empty, then it redirects you to the pane containing items. For example, In a file, the Filepart pane is empty and the Record pane contains some items. Hence, it displays the Record pane only.

3. Click any class to open it. It is divided into two panes:

Panes	Description
Right Pane	It shows the properties of the opened class.
Left Pane	It is divided into the following two tabs: **Sub Class** — It contains a list of all the sub-classes present in the open class. **File** — It contains a list of all the files present in the opened class.

4. Click any file to open it. It is divided into two panes:

Panes	Description
Right Pane	It shows the properties of the opened file.
Left Pane	It is divided into the following two tabs: **Filepart** — It contains a list of all the fileparts present in the opened file. **Record** — It contains a list of all the records present in the opened file.

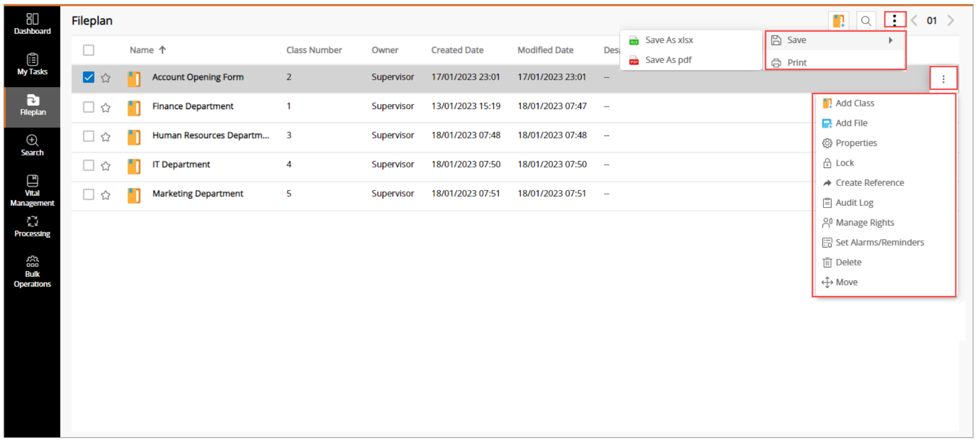
5. Click any filepart to view the list of records present in the filepart.

Working on class, file, and filepart

You can perform the following operations on a class, file, and filepart:

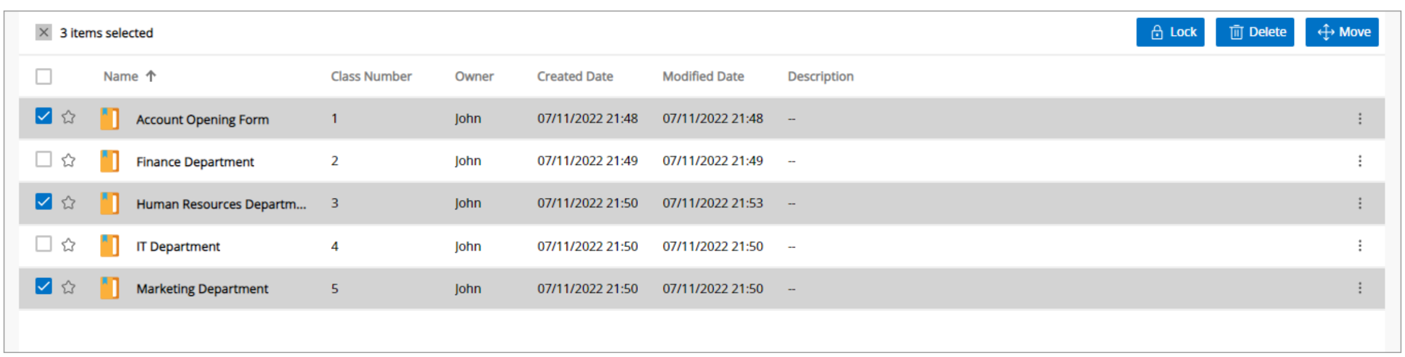
- Add Secondary Name
- Add Class
- Add File
- Properties
- Lock or Unlock
- Audit Log
- Manage Rights
- Set Alarms or Reminders
- Delete
- Move
- Request (Only for file and filepart)
- Close or Reopen (Only for file and filepart)
- Links (Only for file and filepart)
- Custom Operations
- Filter

- [Create Reference]
- [Hold or Release] (Only for file and filepart)



The following operations are available to perform on multiple classes, files, and file parts simultaneously:

- Lock or Unlock
- Delete
- Move
- Custom Operations



Adding class

The class stands first in the hierarchy of the Fileplan (Class > File > Filepart > Record). To begin with, a class is created at the root level.

To add a class, perform the below steps:

1. On the Fileplan screen, click the **Add Class** icon. The Add Class dialog appears.

2. Enter and select the following **Basic** details:

Fields	Description
Class Name	Name of the class.
Class Number	Number of the class.
Description	A brief description of the class.
Next Class Type	Enter the next class type.
Location	Select a required location.
Box	Select a required box.

3. (Optional) To add a secondary name for class, click ⓘ and then refer to the steps mentioned in Adding secondary name.
4. Click the **DataClass** tab and select a required **DataClass**. The fields associated with the selected data class appear.
5. Specify the valid values of the data class fields.

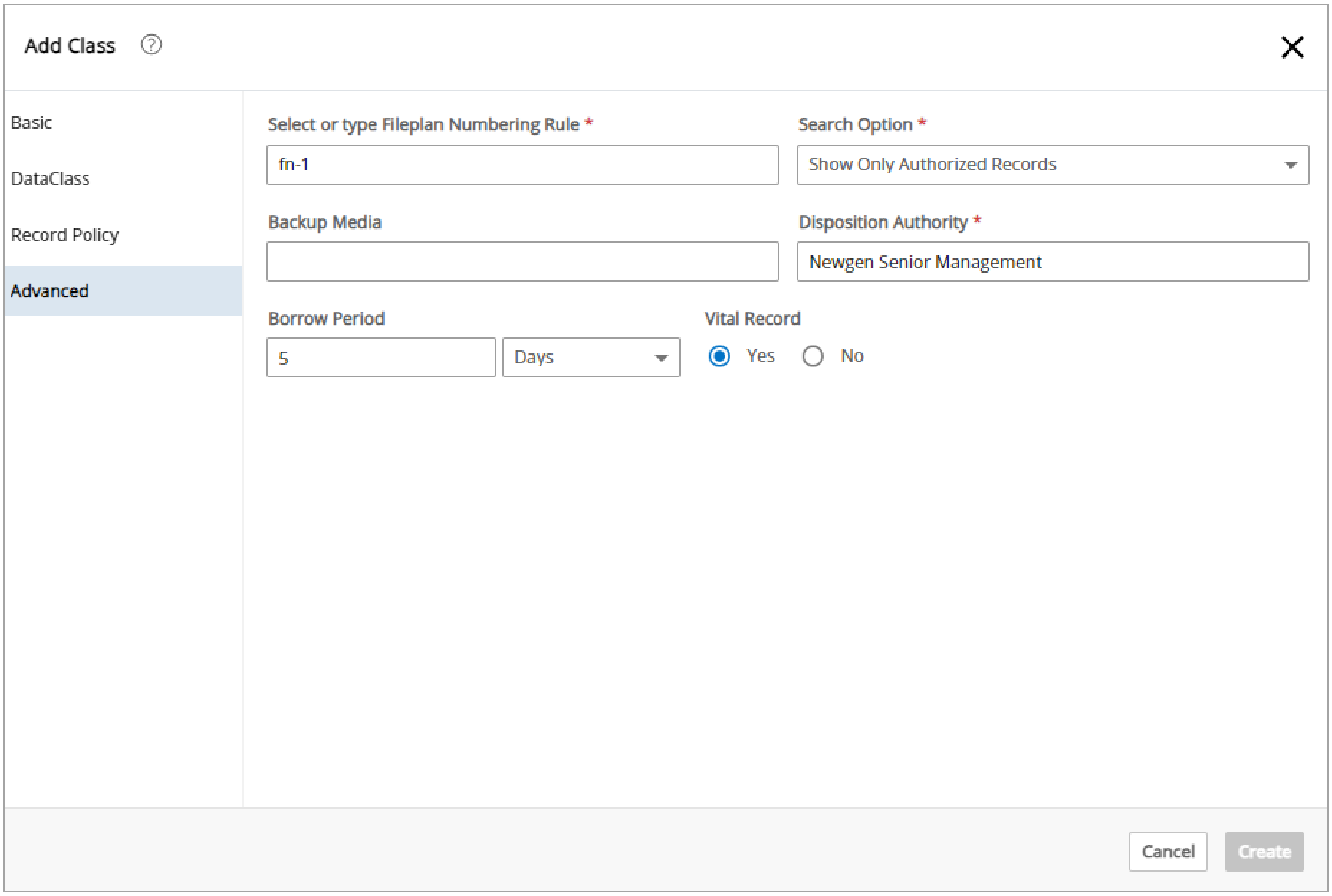
> The administrator of OmniDocs configures the data class fields and their validation using the NewgenONE OmniDocs Admin module.

6. Click the **Record Policy** tab and select the following rules:

Fields	Description
Cutoff Rollover Rule	Select a required cutoff rollover rule.
Storage Rule	Select a required storage rule.
Retention Rule	Select a required retention rule.

7. Click the **Advanced** tab to provide the advanced information.

   The fields marked with * are mandatory to fill.



8. Click **Create** to continue. The message “Class with number <Class number> added successfully” appears.

   Once the new class is created, all operations of the newly created class are disabled except Audit Log, Alarm and Reminder, Delete, Print, and Save. The creator or owner of the class can only see the metadata of the class but can’t perform any operation until any other user having class approval rights approves that class. To approve the created class, the user having class approval rights must click the **Actions** ⋮ icon against the required class and select **Approve**.

To create sub-classes within an existing class, open a required class and perform the same steps as mentioned above.

Adding file

File stands second in the hierarchy of the Fileplan (Class > File > Filepart > Record). The files can be created within a class or sub-class.

To add a file, perform the below steps:

1. On the Fileplan screen, click the **Actions** ⋮ icon against a class (where you want to add a file) and select **Add File**. Alternatively, open a class (where you want to add a file), and on the File pane, click the **Add File** icon. The Add File dialog appears.
2. Enter and select the following **Basic** details:

Fields	Description
File Name	Name of the file.
File Number	Number of the file.
Description	A brief description of the file.
Barcode	Bar code of the file.
File identifier	Enter a specific file identifier number.
Aggregation Level	Select one of the following aggregation level: ● File ● Filepart ● Record
Location	Select a required location.
Box	Select a required box.

3. (Optional) To add a secondary name for the file, click ⓘ and then refer to the steps mentioned in Adding secondary name.
4. Click the DataClass tab and select a required **DataClass**. The fields associated with the selected data class appear.
5. Specify the valid values of data class fields.

> The OmniDocs administrator configures the data class fields and their validation using the NewgenONE OmniDocs Admin module.

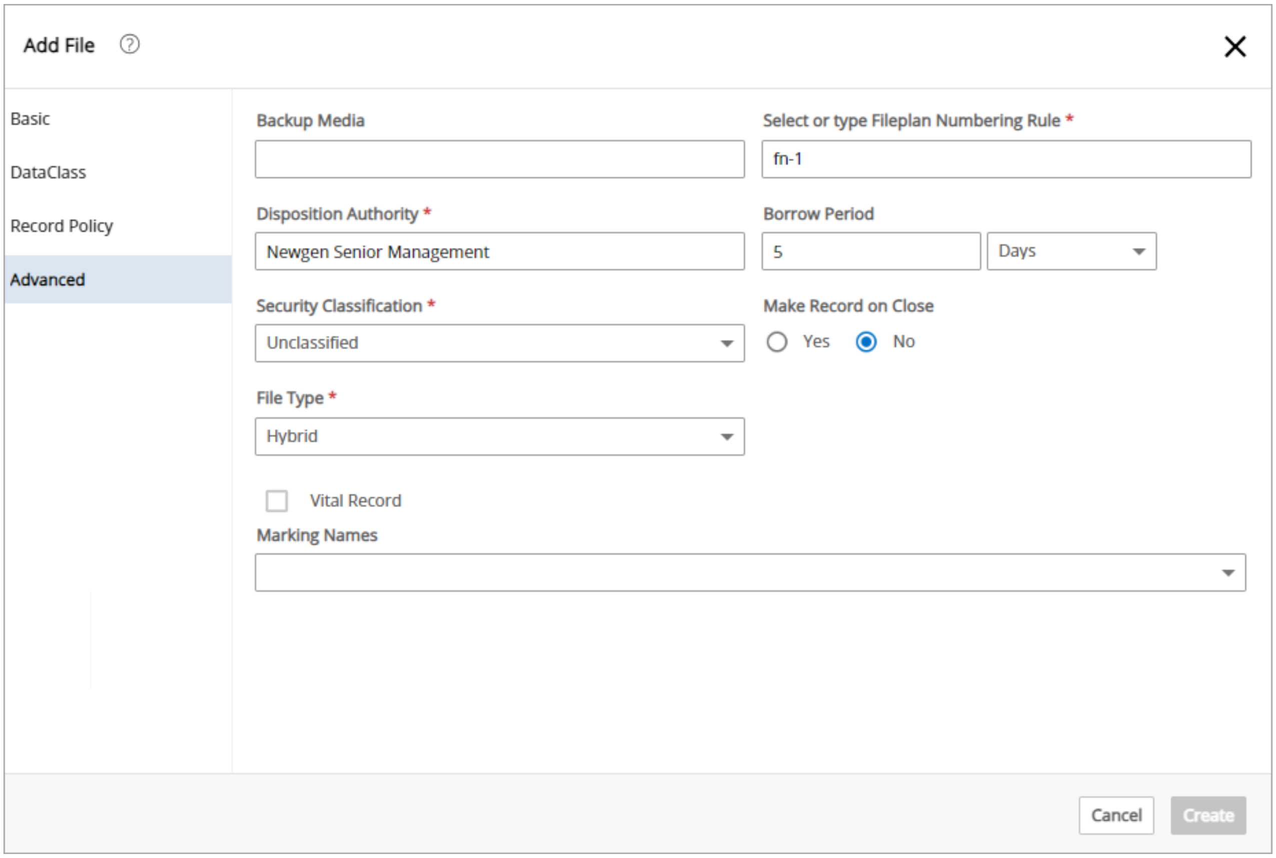
6. Click the **Record Policy** tab and select the following rules:

Fields	Description
Cutoff Rollover Rule	Select a required cutoff rollover rule.
Storage Rule	Select a required storage rule.
Retention Rule	Select a required retention rule.

7. Click the **Advanced** tab and provide the following information:

Fields	Description
Backup Media	Name of the backup media where the file is stored.
Select or type Fileplan Numbering Rule	The fileplan numbering scheme for the files within the class.
Disposition Authority	An authorized person can dispose of the file.
Borrow Period	It indicates the time period for which a file can be held with a specific user who has requested that file. The borrowing period is specified in days, months, or years.
Make Record on Close	If checked, then the closing file operation marks all the documents as records.
Security Classification	It allows you to restrict other users to access certain file. This is achieved by applying an appropriate level of security mentioned in the following list: ● Top Secret ● Secret ● Confidential ● Restricted ● Unclassified The security classification follows the same hierarchy as mentioned in the above list. The files with specific security levels are accessible only to the authorized users, groups, or roles who have permission to access that files. For example, a top security file will be visible to only those users, groups, or roles who have permission to access the top secret files. Similarly, the users, groups, or roles who have permission to access confidential, restricted, and unclassified files, but cannot access secret and top secret files.
File Type	Select an option to apply an appropriate file type. The different file types are as follows: ● **Physical** - A physical copy of the file exists. ● **Digital** - A digital copy of the file exists. ● **Hybrid** - Both physical and digital copies of the file exist.

Fields	Description
Vital Record	Specify whether the records present in the class are vital or not. To enable, select the checkbox and define its properties: ● **Groups, Users,** or **Roles** (Reviewer name) - Select the required reviewers' names from the list of available groups, users, or roles. ● **Vital Review Type** - It is of two types: ◦ **Cyclic** - Based on the option selected, a cyclic review can be performed daily, weekly, monthly, quarterly, half-yearly, and yearly. Select the required option from the Vital Review Cycle dropdown. ◦ **Date** - Based on the option selected, a date review can be performed on the specified date. Set the required date by clicking on the Vital Review Date calendar icon.
Markings	The Marking Management feature allows you to configure the refined search parameters. Select Marking Names and Marking Values from the associated dropdown lists. From the dropdown list, select the *Color* marking. Select the required color to represent the importance of the file and the records contained within it. A dot of the selected color begins to appear next to the file name in the list of files.



Fields marked with * are mandatory to fill.

8. Click **Create** to continue. The message “File with number <File number> added successfully” appears.

Adding filepart

A File is further divided into Filepart. Filepart is next in the hierarchy to File (Class > File > Filepart > Record). A File can contain multiple Fileparts.

To add a filepart, perform the below steps:

1. In the File pane, click the **Actions** ⋮ icon against the required file and select **Add Filepart**. The Add Filepart dialog appears. Alternatively, go to the File > Filepart pane and click the **Add Filepart** icon. The Add Filepart dialog appears.

A confirmation dialog appears if the File already has an open Filepart and you want to create a new Filepart. If you create a new Filepart then the previous open Filepart must be closed. Click **Confirm** to proceed with the Filepart creation.

2. Enter and select the following **Basic** details:

Fields	Description
Filepart Name	Name of the filepart.
File Number	Number of the file in which the filepart is to be added.
File Part Number	Number of the filepart.
Description	A brief description of the filepart.
Location	Select a required location.
Box	Select a required box.

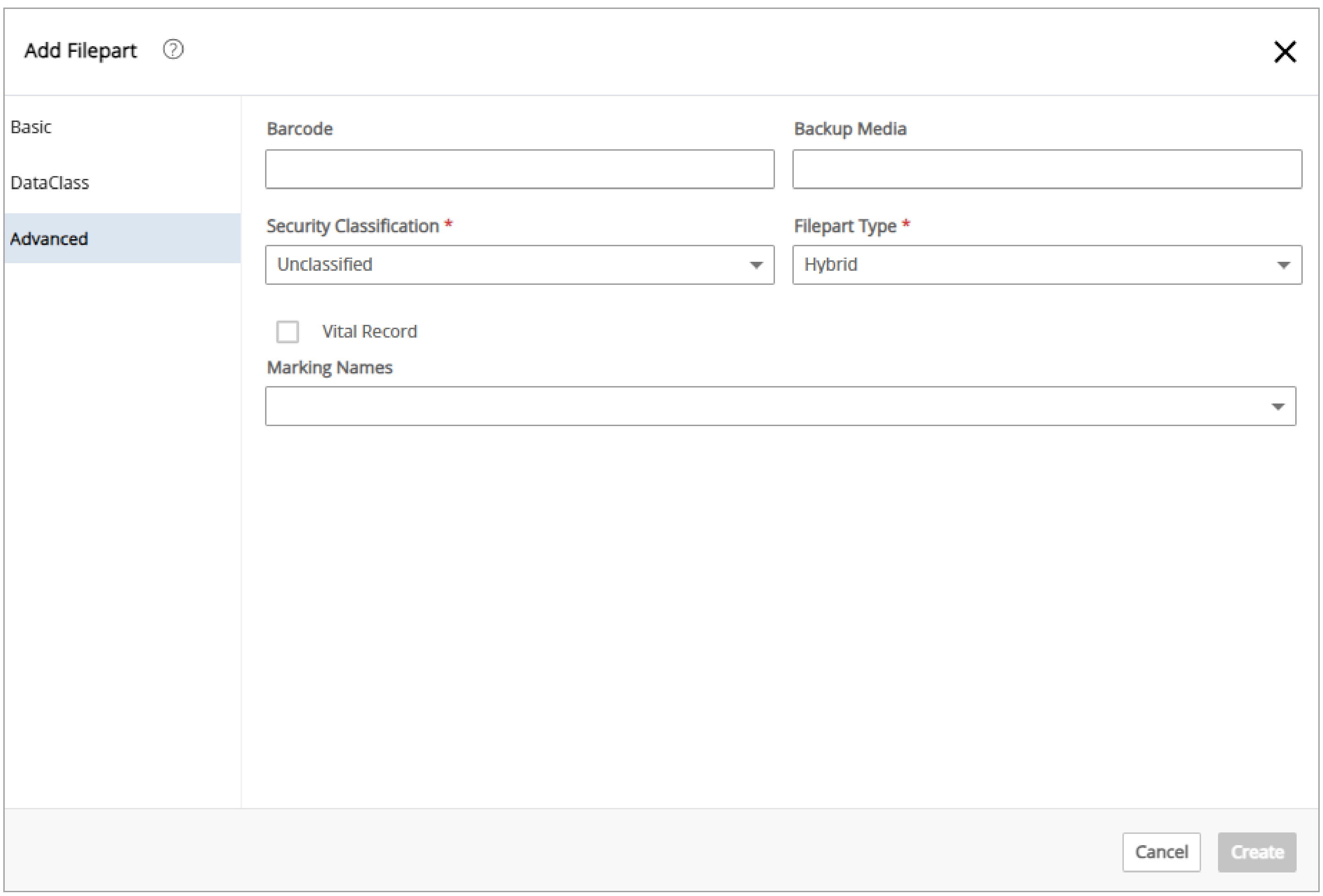
3. (Optional) To add a secondary name for filepart, click ⓘ and then refer to the steps mentioned in Adding secondary name.
4. Click the **DataClass** tab and select a required **DataClass**. The fields associated with the selected data class appear.
5. Specify the valid values of the data class fields.

> The administrator of OmniDocs configures the data class fields and their validation using the NewgenONE OmniDocs Admin module.

6. Click the **Advanced** tab to provide the following advanced information:

Fields	Description
Barcode	Bar code for the filepart.
Backup Media	Name of the backup media where the filepart is stored.
Security Classification	It allows you to restrict other users to access certain filepart. This is achieved by applying an appropriate level of security mentioned in the following list: ● Top Secret ● Secret ● Confidential ● Restricted ● Unclassified The security classification follows the same hierarchy as mentioned in the above list. The fileparts with specific security levels will be accessible only to the authorized users, groups, or roles who have permission to access that filepart. For example, a top security filepart will be visible to only those users, groups, or roles who have permission to access the top secret fileparts. Similarly, the users, groups, or roles who have confidential permission can access confidential, restricted, and unclassified fileparts, but cannot access secret and top secret fileparts.
Filepart Type	Select an option to apply an appropriate Filepart Type. The different filepart types are as follow: ● **Physical** - A physical copy of the filepart exists. ● **Digital** - A digital copy of the filepart exists. ● **Hybrid** - Both physical and digital copies of filepart exist.

Fields	Description
Vital Record	Specify whether the records present in the class are vital or not. To enable, select the checkbox and define its properties: ● **Groups, Users,** or **Roles** (Reviewer name) - Select the required reviewers' names from the list of available groups, users, or roles. ● **Vital Review Type -** It is of two types: ◦ **Cyclic** - It will be performed Daily, Weekly, Monthly, Quarterly, Half-Yearly, and Yearly. Select the required option from the Vital Review Cycle dropdown. ◦ **Date** - It will be performed on the specified date. Set the required date by clicking on the Vital Review Date calendar icon.
Markings	The Marking Management feature allows you to configure the refine search parameters. Select Marking Names and Marking Values from the associated dropdown lists.



Fields marked with * are mandatory to fill.

7. Click **Create** to create a new filepart. The message “Filepart with number <Filepart number> added successfully” appears.

Adding secondary name

This feature allows you to save the names of classes, files, and fileparts in a language different from English. Currently, Arabic is supported for adding a secondary name. By default, the display language remains the same as the locale language. You can perform searches in both languages.

To add a secondary name, perform the below steps:

1. Click the Actions icon against the required class, file, or filepart name and select Add Secondary Name.
   Alternatively, open a specific class, file, or filepart, click the Actions icon that appears at the top-right corner of the screen, and select Add Secondary Name.
   The Add Secondary Name dialog appear
2. Click the **+Add More**.
3. Select Arabic as the language and then enter a secondary name.
4. Click to add the secondary name, then click the **Confirm** button to add the secondary name details.
5. Click **Confirm** to save the entered details.

To edit the secondary name, perform the below steps:

1. Click icon.
2. Change the name and then click the Edit icon to add the modified details.
3. Click the **Confirm** button to save the details.

To delete the secondary name, Perform the below steps:

1. Click , to delete the secondary name.

Deleting class

To delete a class, perform the below steps:

1. On the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select **Delete**. Alternatively, open a specific class, click the **Actions** ⋮ icon on the top-right corner of the screen and select **Delete**. The Delete dialog appears to confirm the deletion.
2. Specify the reason for deletion and click **Confirm**. The message "Class(es) Deleted Successfully" appears.

To delete multiple classes simultaneously:

1. On the Filplan screen, select the checkboxes against the specific classes to delete. On selecting multiple classes, the **Delete** button appears.
2. Click **Delete**. The Delete dialog appears to confirm the deletion.
3. Specify the reason to delete the selected classes and click **Confirm**. The message "Class(es) Deleted Successfully" appears.

Deleting file

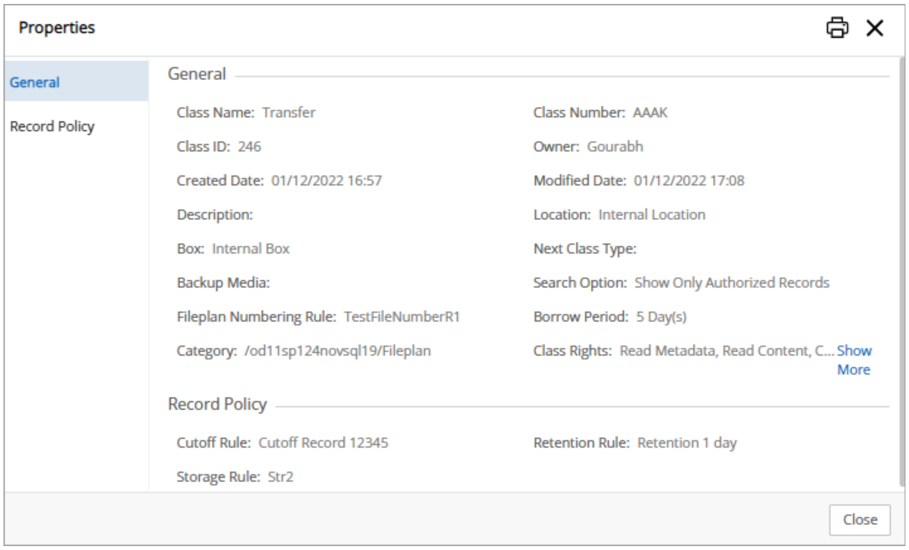
Refer to the Deleting class section for procedural details.

Deleting filepart

Refer to the Deleting class section for procedural details.

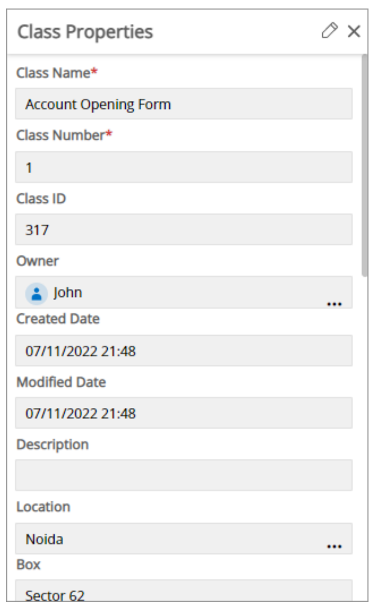
Viewing and modifying properties of class

To view the properties of a class, on the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select **Properties**. The Properties dialog appears. You can print the displayed properties by clicking the **Print** icon. The option to print selective details is also available.



To modify the properties of a class, perform the below steps:

1. Open a specific class. By default, the Class Properties pane appears on the right.



> To hide or display the Class Properties pane, click the Properties icon at the upper-right corner of the Class information screen.

2. Click the **Edit** icon. The editable properties fields enable to modify.
3. Modify the required properties. Once the modification is done, the **Save** button appears.
4. Click **Save**. The message “Properties Updated Successfully” appears.

To execute selective printing of class properties, perform the below steps:

1. Click the **Actions** ⋮ icon against the required class and select **Properties** from the menu. The Properties dialog appears.
2. Click the **Print** icon in the upper-right corner. The Select columns for printing dialog appears. By default, all properties from all sections are selected.
3. Clear the **Select All** checkbox for the required section. This removes the selection from all properties within that section.
4. Select the checkboxes against the properties you want to print.
5. Click **Print**. The print preview dialog appears.
6. Configure the necessary print settings according to your requirements and click **Print**.

Viewing and modifying properties of file

Refer to the Viewing and modifying properties of class section for procedural details.

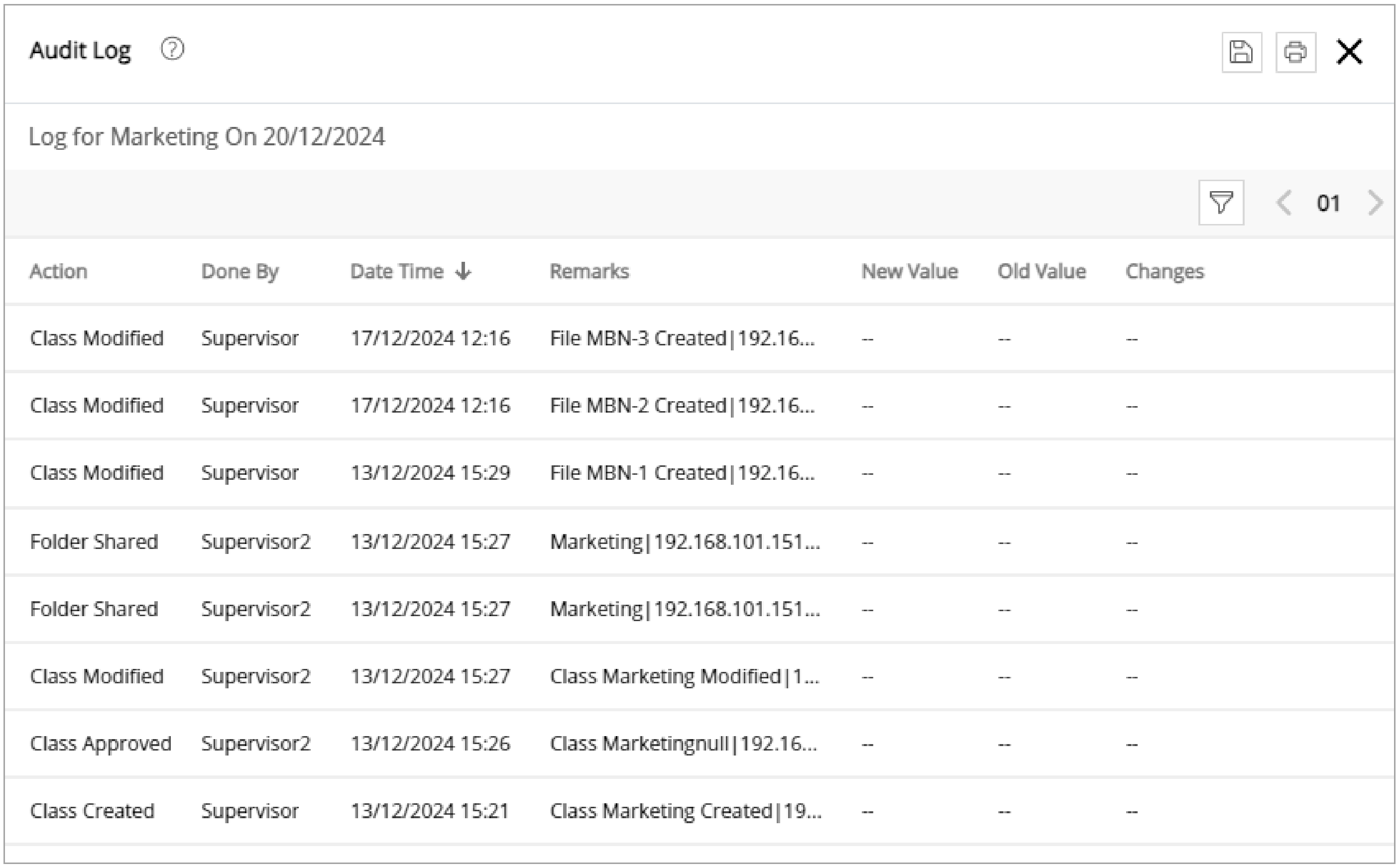
Viewing and modifying properties of filepart

Refer to the Viewing and modifying properties of class section for procedural details.

Viewing audit log of class

The Audit Log provides a chronological record of operations that are performed on the specified object.

To view the audit log of a class, on the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select **Audit Log**. Alternatively, open a specific class and click the **Actions** ⋮ icon,and select **Audit Log**. The Audit Log dialog appears. This dialog displays the list of various operations done by different users in that class.



Action	Done By	Date Time	Remarks	New Value	Old Value	Changes
Class Modified	Supervisor	17/12/2024 12:16	File MBN-3 Created|192.16...	--	--	--
Class Modified	Supervisor	17/12/2024 12:16	File MBN-2 Created|192.16...	--	--	--
Class Modified	Supervisor	13/12/2024 15:29	File MBN-1 Created|192.16...	--	--	--
Folder Shared	Supervisor2	13/12/2024 15:27	Marketing|192.168.101.151...	--	--	--
Folder Shared	Supervisor2	13/12/2024 15:27	Marketing|192.168.101.151...	--	--	--
Class Modified	Supervisor2	13/12/2024 15:27	Class Marketing Modified|1...	--	--	--
Class Approved	Supervisor2	13/12/2024 15:26	Class Marketingnull|192.16...	--	--	--
Class Created	Supervisor	13/12/2024 15:21	Class Marketing Created|19...	--	--	--

To print the audit log, click the **Print** icon. The Print dialog appears. Make the required configurations and click **Print**.

To save the audit log, perform the below steps:

1. On the Audit Log dialog, click the **Save** icon. The options to save the audit log in the following format appears:
   - Save As xlsx
   - Save As pdf
   - Save As Record
2. To save the audit log in XLS or PDF format, click the respective **Save As xlsx** or **Save As pdf** option. The audit log gets downloaded into your system. In case you want to save the audit log as a record in RMS, then follow the below steps:
   a. Click **Save As Record**. The Save As Record dialog appears.
   b. Navigate to the desired filepart where you want to save the audit log as a record and click **Done** to continue. The **Basic** and **Advanced** tabs appear.
   c. Specify the required details in the **Basic** tab and then in the **Advanced** tab as explained in the Adding record section.

In the **Basic** tab, under **Save As**, select a required **pdf** or **xlsx** option to save the audit log in PDF or XLS format.

Viewing audit log of file

Refer to the Viewing audit log of class section for procedural details.

Viewing audit log of filepart

Refer to the Viewing audit log of class section for procedural details.

Locking or unlocking class

It is possible to lock or unlock the existing classes in the fileplan. When a class is locked, then actions like adding, deleting, sharing, and moving sub-classes, files, and fileparts are unable to perform within the class.

To lock a class, on the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select **Lock**. Alternatively, open a specific class and click the **Lock** icon. The message "Class(es) Locked Successfully" appears.

To unlock a locked class, on the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select **Unlock**. Alternatively, open a specific class and click the **Unlock** icon. The message "Class(es) Unlock Successfully" appears.

To lock or unlock multiple classes simultaneously, select the checkboxes against the specific classes. On selecting multiple checkboxes, the **Lock** or **Unlock** button appears. Click **Lock** or **Unlock** to continue.

Creating reference of class

The Create Reference operation allows you to create a reference of a class in another class available in your fileplan repository.

To create a reference of a class, perform the below steps:

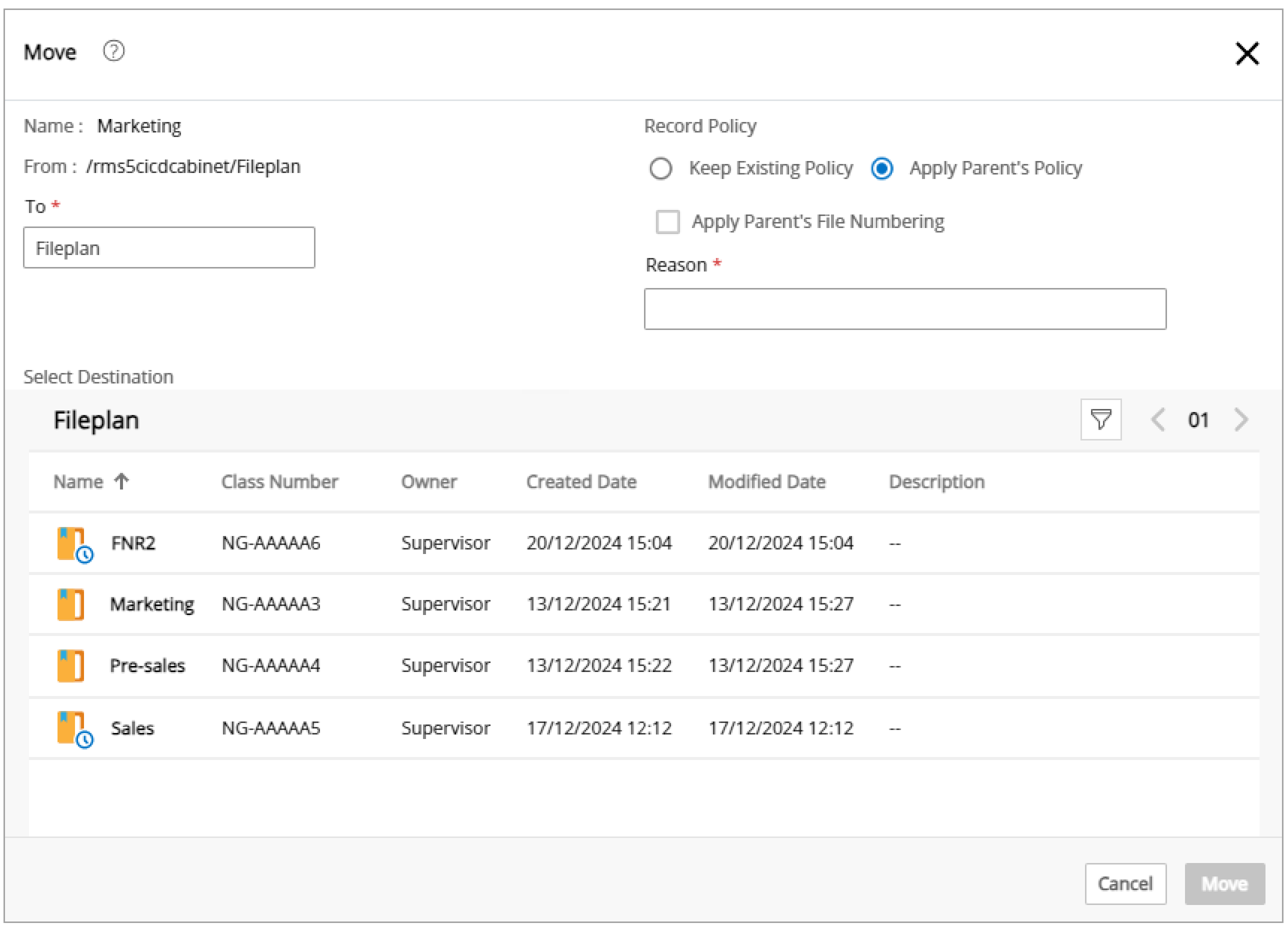
1. On the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select **Create Reference**. Alternatively, open a specific class and click the **Create Reference** icon. The Create Reference dialog appears.
2. Select a destination where you want to create the reference of a specific class. The name of the selected class appears in the **To** box.
3. Click **Create Reference**. The message "Reference Created Successfully" appears.

Moving class

The Move operation allows you to move the desired class(es) into another Class.

To move a class, perform the below steps:

1. On the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select **Move**. Alternatively, open a specific class and click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Move**. The Move dialog appears.



Fields marked with * are mandatory to fill.

2. Select a desired destination from the Select Destination list. The selected destination appears in the To box.
3. Select one of the following Record Policy:
   - Keep Existing Policy
   - Apply Parent's Policy

   If you want to apply the file numbering scheme of the parent folder on the class being moved, then click **Apply Parent's File Numbering** checkbox.

4. Specify the reason in the **Reason** box for moving the class and click **Move**. The message "Class(es) Moved Successfully" appears.

To move multiple classes simultaneously, click the checkboxes against the desired classes. The **Move** button enables. Click **Move** and perform the same steps as mentioned above.

Moving file

Refer to the Moving class section for procedural details.

Moving filepart

Refer to the Moving class section for procedural details.

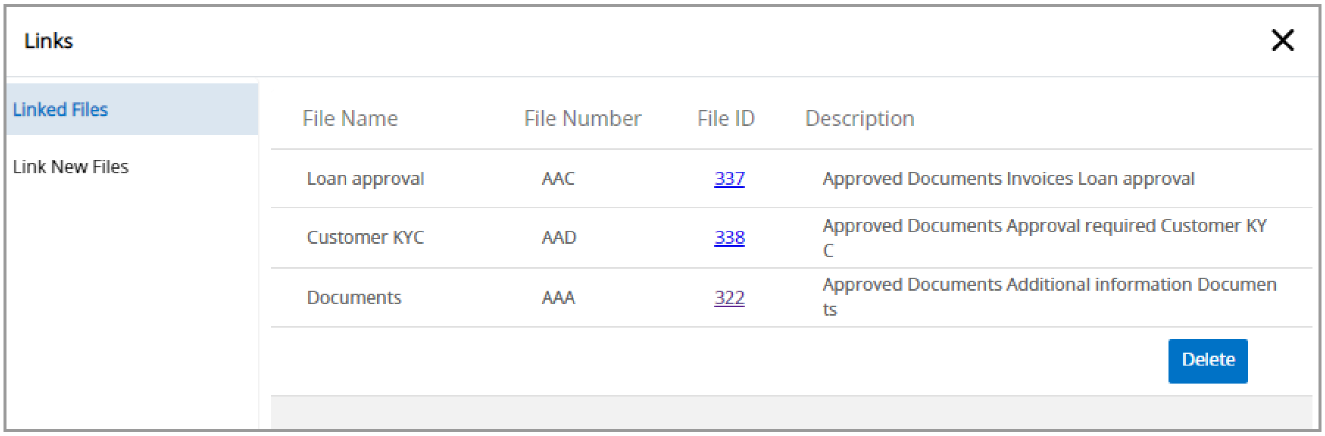
Linking files

The Links operation allows you to link a file to other files. It also displays a list of linked files.

To link a file, perform the below steps:

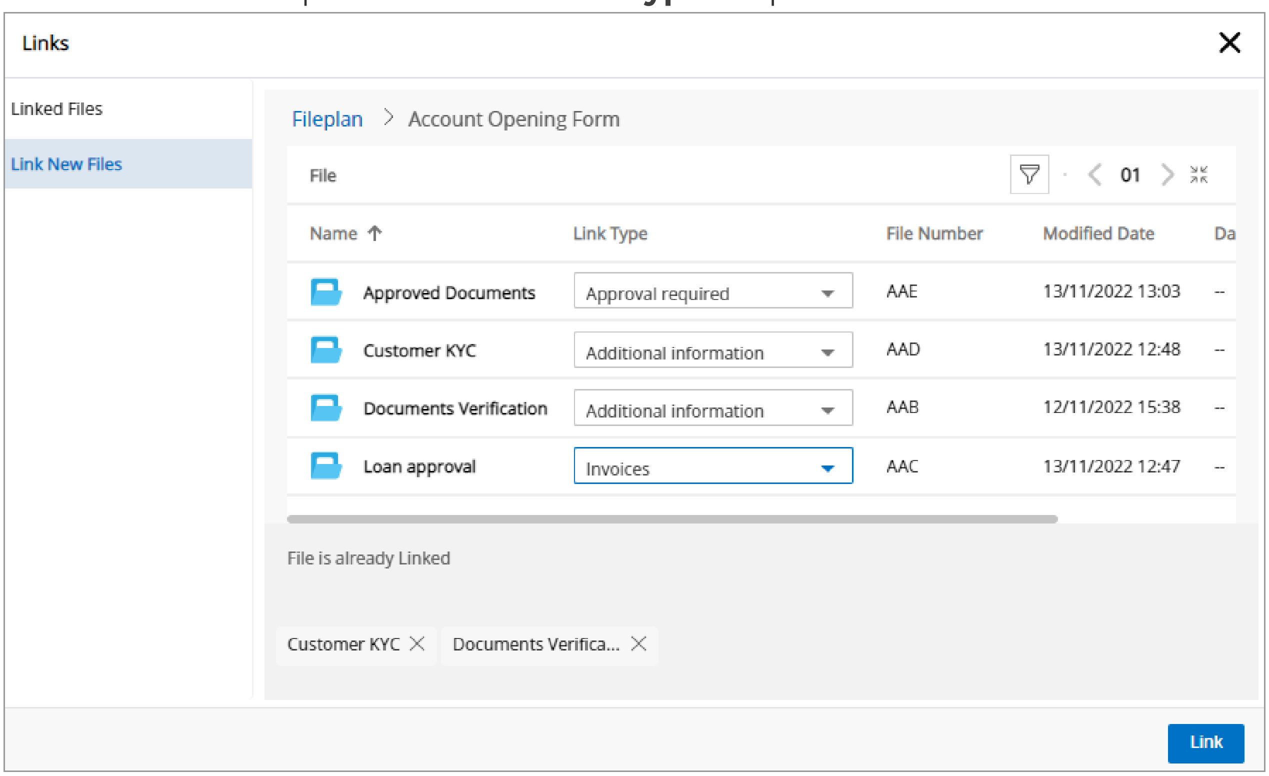
1. Open a specific class.
2. In the File pane, click the **Actions** ⋮ icon against a specific file and select **Links**. The Links dialog appears. By default, the **Linked Files** tab opens displaying the existing

linked files.



To open a linked file in a separate browser tab, you can click the File ID corresponding to the required File Name.

3. Click the **Link New Files** tab and select the required file(s) available in the fileplan repository.
4. Select a suitable option from the **Link Type** dropdown menu.



5. Click **Link**. The message "File Linked Successfully" appears. The name of the linked file appears in the **Linked Files** tab.

Linking filepart

Refer to the Linking files section for procedural details.

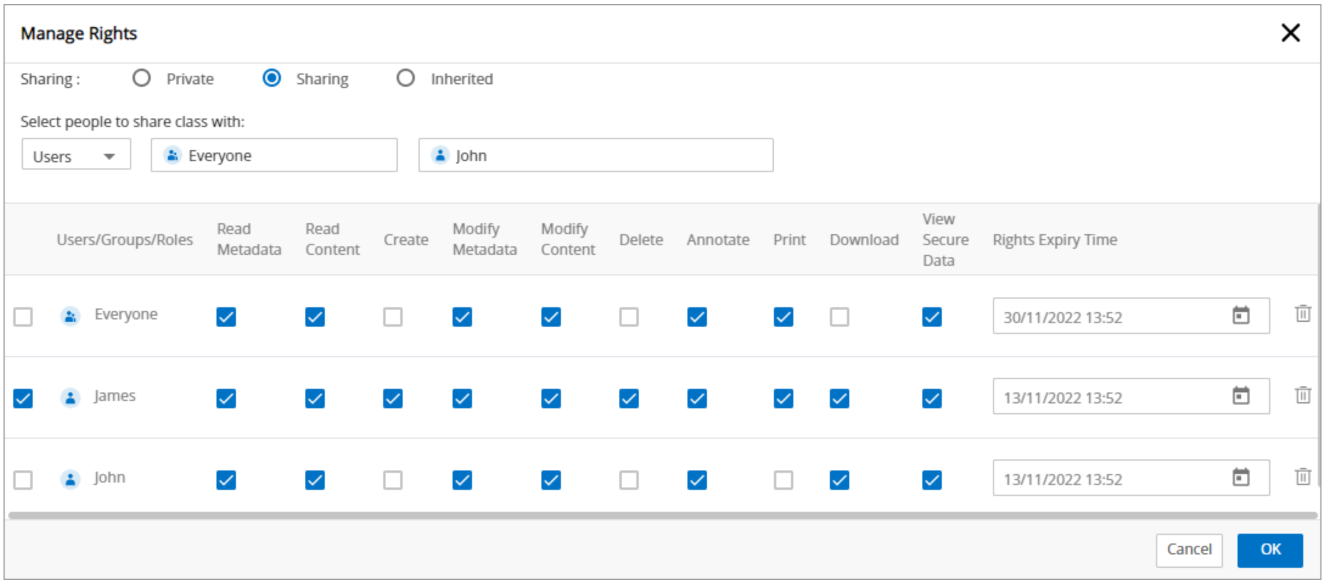
Managing sharing rights for class

The Manage Rights operation allows you to share the classes among the other users of RMS. You can select the groups, users, and roles to assign the rights for shared classes such as read, write, create, annotate, delete, and so on. You can also set the expiry time for the rights assigned to the users. Rights on the shared records will be applicable till the time they have been assigned.

The above description is also applicable for other fileplan items such as files, fileparts, records, and papers profiles.

To manage sharing rights for a class, perform the below steps:

1. On the Fileplan screen, click the **Actions** icon against a specific class and select **Manage Rights**. Alternatively, open a specific class, click the **Actions** icon that appears at the top-right corner of the screen, and select **Manage Rights**. The Manage Rights dialog appears.
2. Select one of the following sharing types as follows:
   - Private - Select this option if you want to share a class only with the Owner or the Supervisor.
   - Inherited - Select this option if you want to inherit the sharing rights of a class from its parent folder.
   - Sharing - Select this option if you want to share a class among multiple Users or Groups of RMS. The message “Do you want to manage from inherited rights?” appears. Make an appropriate choice and follow the below steps:
3. Select a desired group, user, or role from the dropdown menu and specify the other details as required.
4. Select the checkboxes for rights that you want to assign to the selected group, user, or role. If you want to assign all rights to the added group, user, or role, then click the checkbox displayed before the added name.
5. Click the **Select a date** icon in the **Rights Expiry Time** box to set an expiry period for the selected rights. If you want to remove an added group, user, or role from the list, click the **Delete** icon against it.



6. Click **OK** to continue. The message “Sharing Rights Set Successfully” appears.

Managing sharing rights for file

Refer to the Managing sharing rights of class section for procedural details.

Managing sharing rights for filepart

Refer to the Managing sharing rights of class section for procedural details.

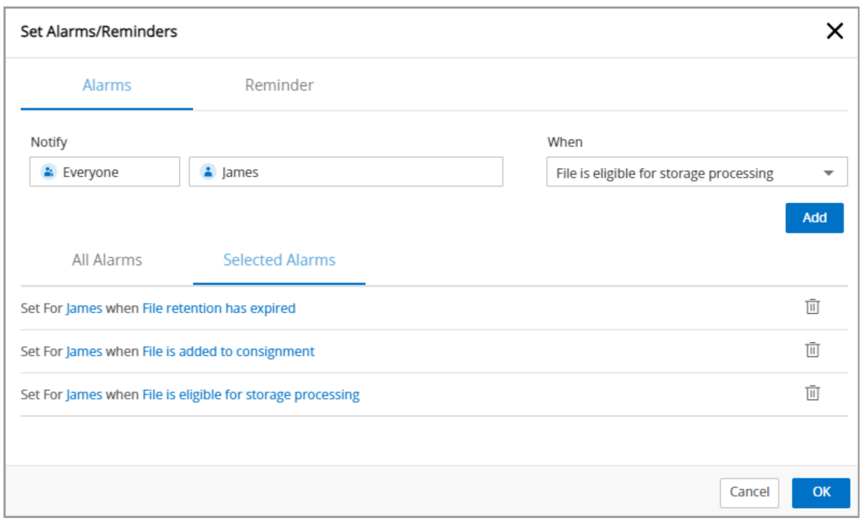
Setting alarms and reminders for class

An alarm is a notification that is flashed and emailed to the selected members of RMS on the occurrence of the specified event. Select the event that triggers the alarm and the member(s) who receive the alarm on that event. When the alarm is triggered then it appears on these members' screens. Also, they will receive an email notifying them of that particular action.

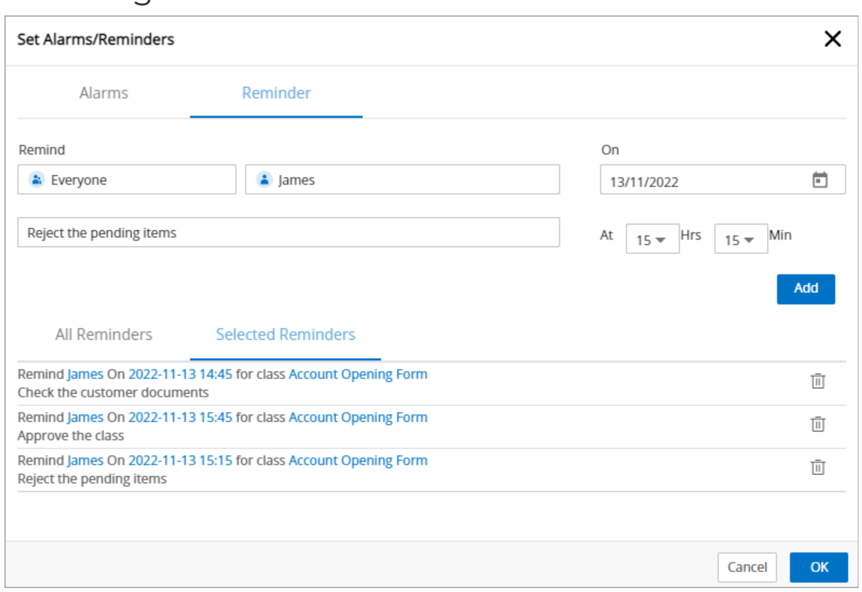
A Reminder is a notification that is flashed and emailed to all the selected members. Set the time at which the reminder must be flashed and select the members who must be reminded. Your comments appear as the message with the reminder.

To set alarms and reminders for a class, perform the below steps:

1. On the Fileplan screen, click the **Actions** icon against a specific class and select **Set Alarms/Reminders**. Alternatively, open a specific class, click the **Actions** icon that appears at the top-right corner of the screen, and select **Set Alarms/ Reminders**. The Set Alarms/Reminders dialog appears.
2. In the **Alarms** tab, select a user name for whom you want to create an alarm using the **Notify** boxes.
3. Select an event in the **When** box and click **Add**. The alarms that are already set appear under **All Alarms** while the newly added alarms appear under **Selected Alarms**.
4. Click **OK** to continue. The message "Alarm(s) Added Successfully" appears.



5. Similarly, click the **Reminder** tab, and select a user name for whom you want to create a reminder using the **Remind** boxes.



6. Specify the date and time when the reminder must trigger.

7. Enter a brief description of the reminder and click **Add** to continue. The reminders that are already set appear under **All Reminders** while the newly created reminders appear under **Selected Reminders**.

   Only 255 characters are allowed for comments.

8. Click **OK** to continue. The message "Reminder(s) Added Successfully" appears.

Setting alarms and reminders for file

Refer to the Setting alarms and reminders for class section for procedural details.

Setting alarms and reminders for filepart

Refer to the Setting alarms and reminders for class section for procedural details.

Closing or reopening file

The Close operation closes the file in a way that no filepart or record can be added for the time the file remains closed. While the Reopen operation counters this action. You can reopen a file if you want to add more fileparts or records to the file.

To close a file, perform the below steps:

1. On the File pane, click the **Actions** icon against a specific file and select **Close**. Alternatively, open a specific file, click the **Actions** icon that appears at the top-right corner of the screen, and select **Close**. The Close dialog appears.
2. Click the **Select a date** icon to select a closing date in the **Closed Date** box.
3. Enter a brief description in the **Comment** box and click **Confirm**. The message "File(s) Closed Successfully" appears. The file icon changes to (Closed file).

To reopen a closed file, perform the below steps:

1. On the File pane, click the **Actions** icon against a specific file and select **Reopen**. Alternatively, open a specific file, click the **Actions** icon that appears at the top-right corner of the screen, and select **Reopen**. The Reopen dialog appears.

2. Enter a brief description in the **Comment** box and click **Confirm**. The message "File(s) Reopened Successfully" appears. The file icon changes to (Reopened file).

To close or reopen multiple files simultaneously, perform the below steps:

1. On the File pane, click the checkboxes against the specific files. The available buttons for multiple operations enable.
2. Click **Close** or **Reopen**. The Close or Reopen dialog appears. The remaining steps are similar as given above in the respective procedures of closing or reopening a file.

Closing or reopening filepart

The Close operation closes a filepart in a way that no record can be added for the time a filepart remains closed. While the Reopen operation counters this action. You can reopen a filepart if you want to add more records to a filepart.

Refer to the Closing or reopening file section for procedural details.

Only one filepart can remain open at a time in a particular file. In case of opening a closed filepart in a file, another open filepart in that file gets closed.

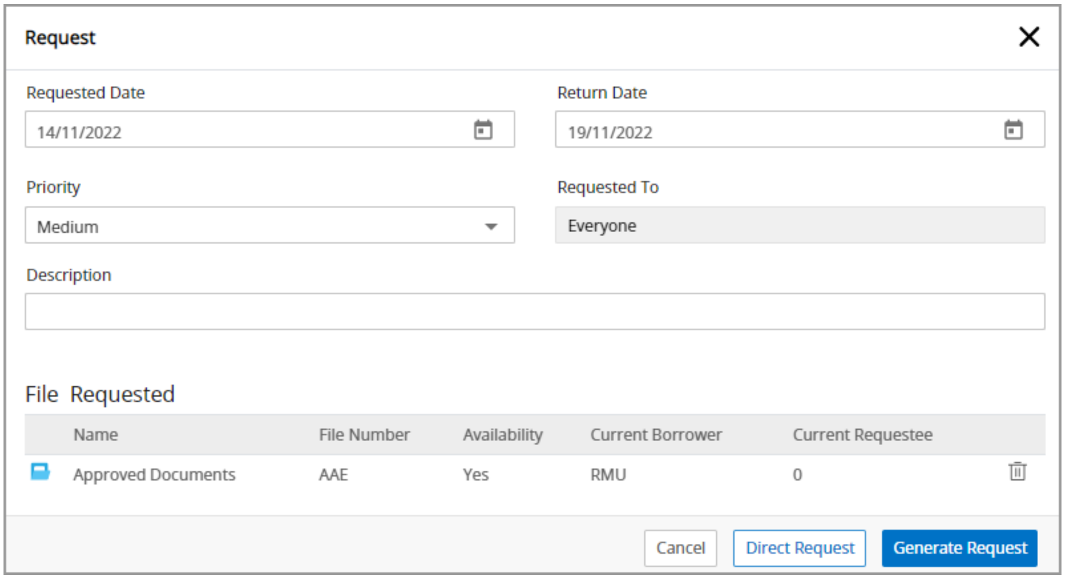
Requesting file or filepart

The Request operation allows you to request those files or fileparts that have already been closed. When a request is made for such file or fileparts, the corresponding information is passed to whom the request is made. You can see the requests made to you in the Incoming Requests interface of the RMS Process in OmniDocs Web, and Grant or Reject the requests.

The items requested are clubbed under a request number so that you can directly grant or reject all the items straightaway. You can also grant or reject items under this request number individually.

To request a file or filepart, perform the below steps:

1. Go to the File or Filepart pane.
2. Click the **Actions** icon against a specific closed file or filepart.
3. Select Request. The Request dialog appears. The specific file appears in the File Requested list. If required, you can remove a file or filepart from this list by clicking the Delete icon against a specific file or filepart.



4. Specify the following details:

Fields	Description
Requested Date	The date on which the file or filepart is required. By default, the current date is pre-filled.
Return Date	The date on which the file or filepart will be returned. By default, this date is pre-filled which is calculated based on the Borrow period defined by RMS Admin.
Priority	Priority of the request. It can be Low, Medium or High.
Request To	User, Role, or Group to whom the request is made.
Description	Description of the request.

5. Click one of the following options:
   - **Direct Request** - Select this option if you want to make a direct request for a specific file or filepart. In case, any other user is the current borrower of the requested file or filepart, a request can be made directly to that user for the required file or filepart.

- **Generate Request** - Select this option if you want to send the transfer request note. The dialog appears showing the summary and status of the request made. You can take a print by clicking the **Print** icon, or else close the dialog.

Holding or releasing a file

In RMS, you can put files and records on hold. This helps temporarily " freeze" the files and records to prevent them from being altered or deleted. Once a record is put on hold, you can not apply any policies and rules to it.

Multiple users can put a file or record on hold at a time so that if one user releases the file or record, it does not go into the destruction processing as some other users might still have a requirement of that file or record. Once the file or record is put on hold, the Hold operation only disables those users who have applied the hold to the file or record. For others, the Hold operation remains enabled.

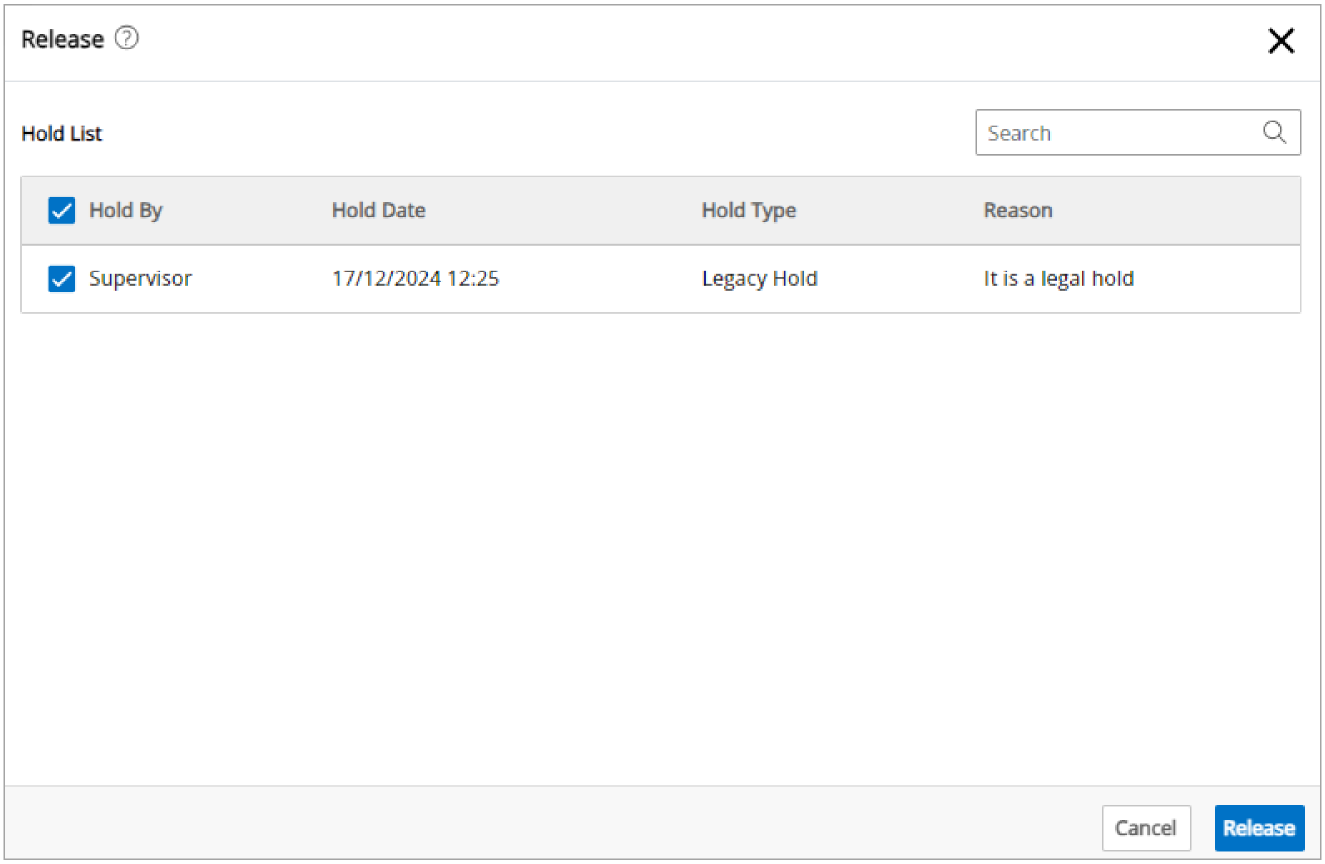
Any RMS user who applies Hold to a file can release the same file for other users as well.

To apply a hold to a file, perform the below steps:

1. On the File pane, click the **Actions** icon against a specific file and select **Hold**. Alternatively, open a specific file, click the **Actions** icon at the screen's top-right corner, and select **Hold**. The Hold dialog appears.
2. Select the **Hold Type** from the drop-down and enter a brief description in the **Reason** box.
3. Click **Hold** to continue. The message "File(s) Successfully put on hold" appears.

To release a file on which hold is applied, perform the below steps:

1. On the File pane, click the **Actions** icon against a specific file and select **Release**. Alternatively, open a specific file, click the **Actions** icon at the screen's top-right corner, and select **Release**. The Release dialog appears.



2. Select the checkboxes against the user names for whom you want to release the file.
3. Click **Release** to continue. The message "File(s) Released Successfully" appears.

To apply a hold on multiple files simultaneously, perform the below steps:

1. On the File pane, select the checkboxes against the specific files on which you want to apply hold.
2. Click the **Actions** ⋮ icon at the top-right corner of the File pane and select **Hold**. The Hold dialog appears.
3. Select the **Hold Type** from the drop-down and enter a brief description in the **Reason** box.
4. Click **Hold** to continue. The message "File(s) Successfully put on hold" appears.

To release multiple files simultaneously, perform the below steps:

1. On the File pane, select the checkboxes only for the files for which hold is applied. On selecting multiple checkboxes, the **Release** button is enabled at the top-right corner of the File pane.
2. Click **Release** to continue. The Release dialog appears.

2. Select the checkboxes against the user names for whom you want to release the file.
3. Click **Release** to continue. The message "File(s) Released Successfully" appears.

Holding or releasing filepart

Refer to the Holding or releasing a file section for procedural details.

Custom operations for class

The RMS Admin module allows the administrator to create custom operations for classes. Once a custom operation is created, you can access it from the **Actions** list of classes in the RMS Web module.

To access a custom operation for a class, on the Fileplan screen, click the **Actions** ⋮ icon against a specific class and select the required custom operation. Alternatively, open a specific class and click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select the required custom operation. The custom operation associated with the class appears.

To access a custom operation for multiple classes simultaneously, click the checkboxes against the desired classes. Click the **Actions** ⋮ icon that appears at the top-right corner and select the required custom operation. The custom operation associated with the class appears.

Custom operations for file

Refer to the Custom operations of class section for procedural details.

Custom operations for filepart

Refer to the Custom operations of class section for procedural details.

Filter

The Filter feature allows you to sort listed items based on certain criteria. Refer to the below section to apply the filter:

- Filtering class
- Filtering file
- Filtering filepart

Filtering class

To apply the filter for a class, perform the below steps:

1. On the Fileplan screen, click the **Filter** icon. The filter dialog appears
2. Specify the following filter criteria:

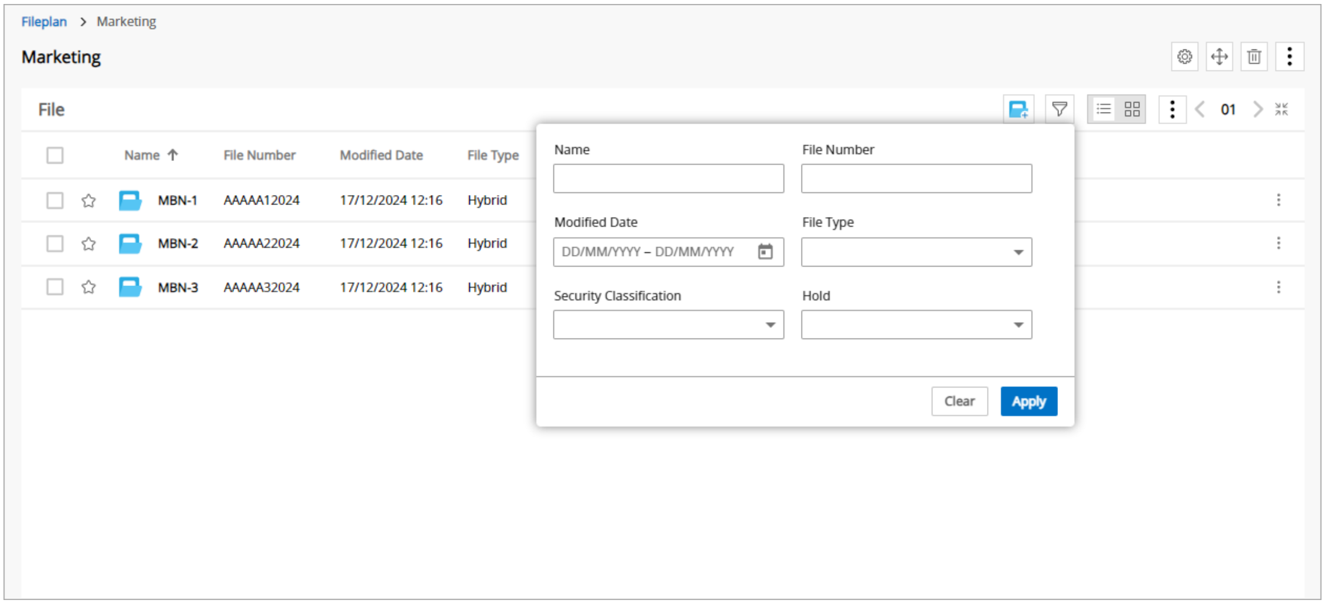
Fields	Description
Name	Enter the name of the required class.
Class Number	Enter the class number of the required class.
Owner	Enter the owner's name of the required class.
Created Date	Select the range (From-To) of dates between which the required class was created.
Modified Date	Select the range (From-To) of dates between which the required class was modified.

3. Click **Apply** to view the results.

Filtering file

To apply the filter for a file, perform the below steps:

1. On the File pane, click the **Filter** icon. The filter dialog appears.



2. Specify the following filter criteria:

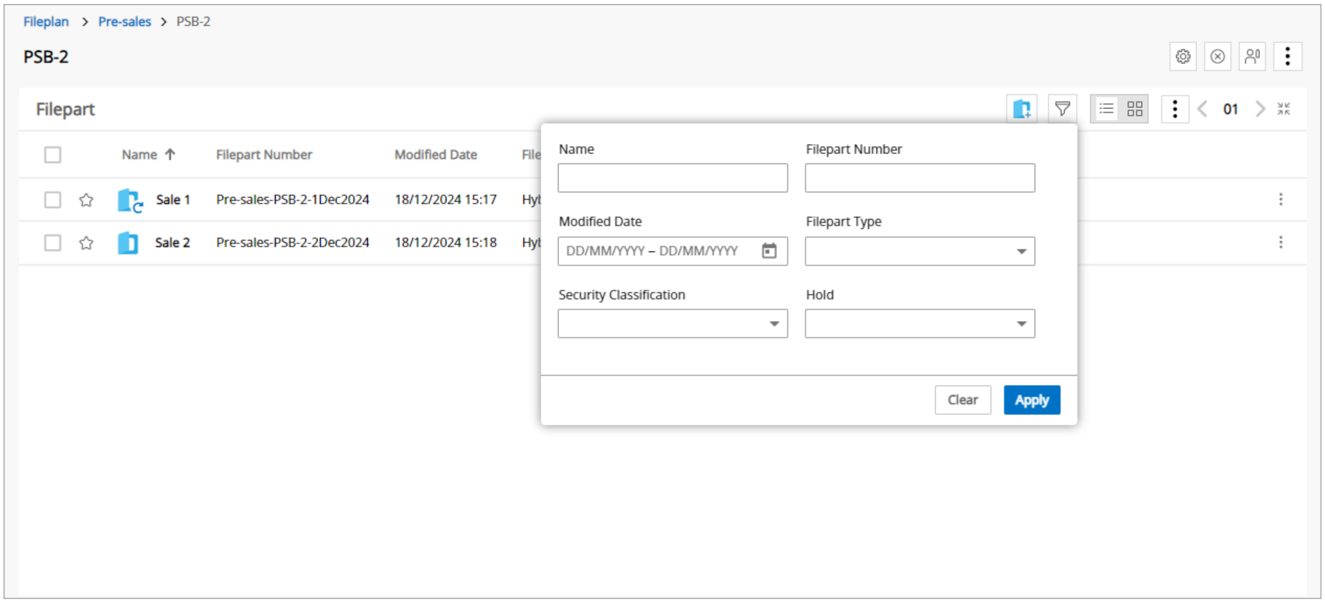
Fields	Description
Name	Enter the name of the required file.
File Number	Enter the file number of the required file.
Modified Date	Select the range (From-To) of dates between which the required file was modified.
File Type	Select an option to apply an appropriate filepart type. The different filepart types are as follows: ● Physical - A physical copy of the filepart exists. ● Digital - A digital copy of the filepart exists. ● Hybrid - Both physical and digital copies of the filepart exist.
Security Classification	Select an option to apply an appropriate level of security. The levels of security classification are as follows: ● Top Secret ● Secret ● Confidential ● Restricted ● Unclassified
Hold	Select whether the hold is applied to the file

3. Click **Apply** to view the results.

Filtering filepart

To apply the filter for a filepart, perform the below steps:

1. On the Filepart pane, click the **Filter** icon. The filter dialog appears.



2. Specify the following filter criteria:

Fields	Description
Name	Enter the name of the required filepart.
Filepart Number	Enter the filepart number of the required filepart.
Modified Date	Select the range (From-To) of dates between which the required filepart was modified.
Filepart Type	Select an option to apply an appropriate filepart type. The different filepart types are as follows: ● Physical - A physical copy of the filepart exists. ● Digital - A digital copy of the filepart exists. ● Hybrid - Both physical and digital copies of the filepart exist.

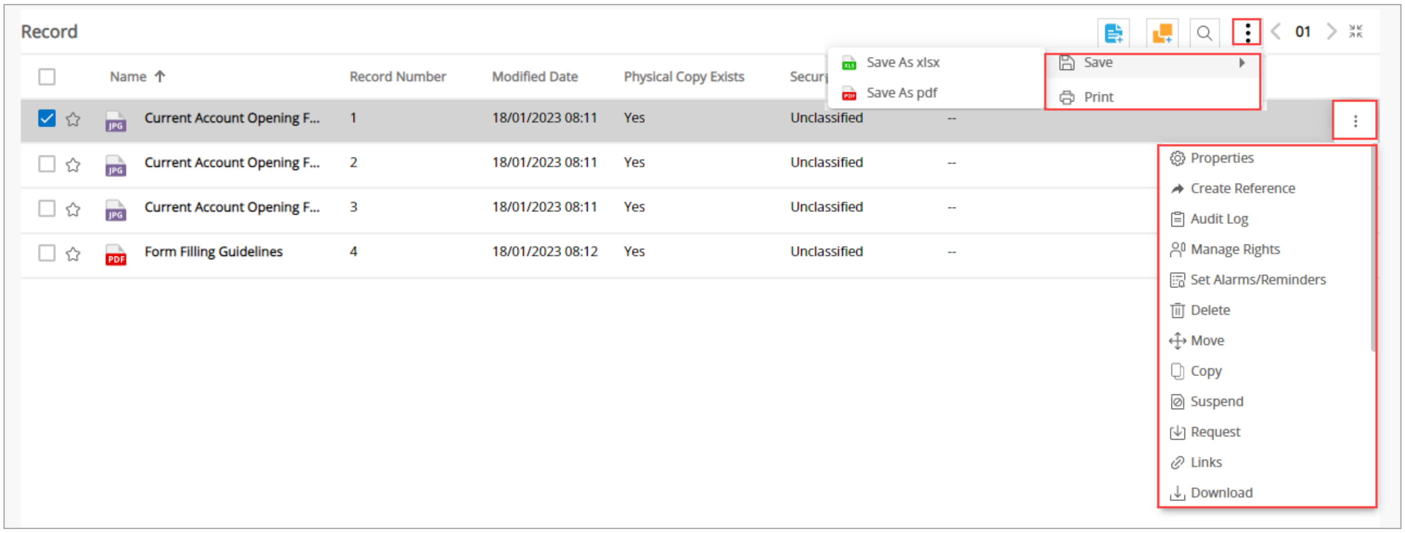
Fields	Description
Security Classification	Select an option to apply an appropriate level of security. The levels of security classification are as follows: ● Top Secret ● Secret ● Confidential ● Restricted ● Unclassified
Hold	Select whether the hold is applied to the file

3. Click **Apply** to view the results.

Working on records

You can perform the following operations on a record:

- Add Record
- Add Paper Profile
- Properties
- Create Reference
- Audit Log
- Manage Rights
- Set Alarms/ Reminders
- Delete
- Move
- Hold or Release
- Request
- Links
- Download
- Make Record
- Checkout or Checkin
- Versions
- Mail
- Renditions
- Setup Supersede Relationship
- Print
- Copy
- Custom Operations
- Filtering Records



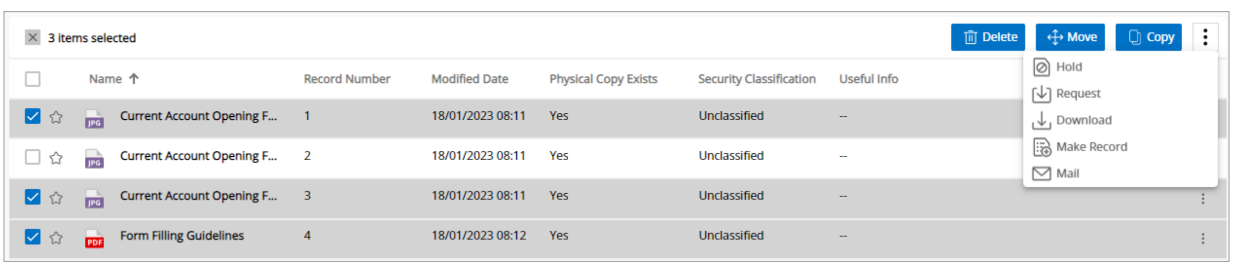
The Record pane allows you to take a print or save the list of existing records by clicking the **Actions** ⋮ icon on the operation bar and then selecting an action as follows:

To print the list of records, click **Print**. The Print screen appears. Make the required configuration and click **Print**.

To save the list of records, click **Save** and select **Save As xlsx** or **Save As pdf** as required. The records list gets downloaded in your system.

You can also perform the following actions on multiple records simultaneously:

- Delete
- Move
- Hold
- Download
- Make Record
- Mail
- Print
- Copy
- Custom Operations



Adding record

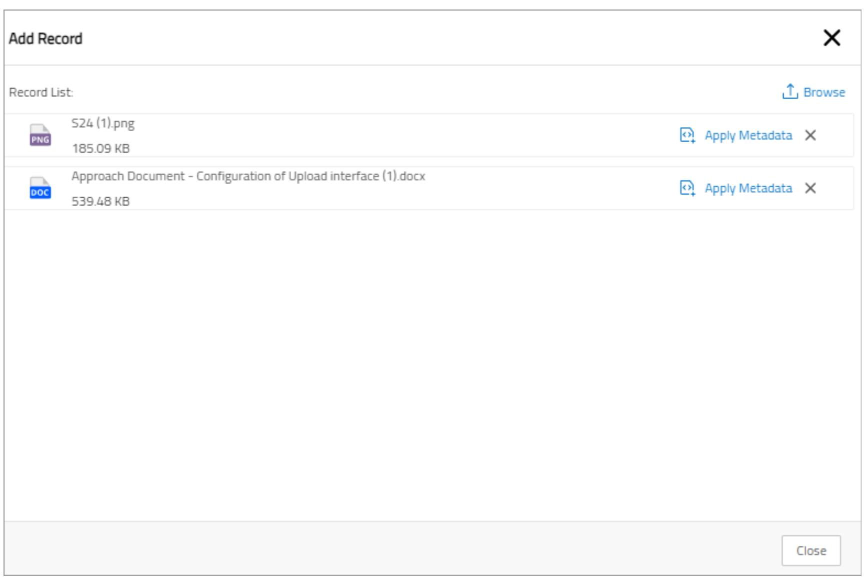
The Add Record operation allows you to add an electronic record in the hierarchical fileplan. Using this feature you can upload records in RMS along with metadata details.

The supported record formats must be defined in the *uploadmime.conf* file of the respective cabinets.

To add a record, perform the below steps:

1. On the File pane, click the **Actions** icon against a specific file and select **Add Record**. Alternatively, open a specific file and click the **Add Record** icon in the **Record** pane. The Add Record dialog appears.
2. Click **Browse** and select the required records. It is also possible to drag and drop the required records from your system to the Add Record dialog. The selected records appear in a list view.

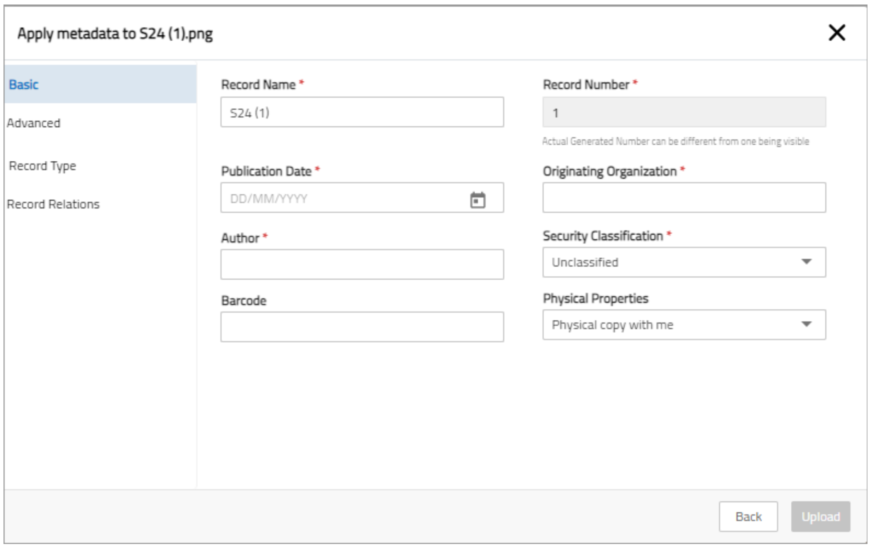
   If the administrator configured the WebScan to scan and upload the records, then an additional option **Scan** appears along with the **Browse** option. To add records using **Scan**, refer to the Scanning and uploading records section for procedural details.



If required, you can remove the unnecessary records from the Add Record list by clicking the Close icon against the specific records.

While uploading one or more records, the Add Record dialog or modal displays the progress of the upload in percentage. If you close this dialog, you can view the upload progress in the upper-right corner of the RMS Web Desktop's header. Click it to view the precise percentage of upload progress. Once the upload concludes, the header displays the message "Success."

3. Click the **Apply Metadata** icon against a record to apply metadata. The Apply metadata to <Record name> dialog appears.



Fields marked with * are mandatory to fill.

4. Specify the following details in the **Basic** tab:

Fields	Description
Record Name	The name of the record.
Record Number	The number of the record.
Publication Date	The date of the record publication.
Originating Organization	The name of the organization.
Author	The author’s name of the record.

Fields	Description
Security Classification	It allows you to restrict other users to access certain record. This is achieved by applying an appropriate level of security mentioned in the following list: ● Top Secret ● Secret ● Confidential ● Restricted ● Unclassified The security classification follows the same hierarchy as mentioned in the above list. The records with specific security levels will be accessible only to the authorized users, groups, or roles who have permission to access that records. For example, a top security record will be visible to only those users, groups, or roles who have permission to access the top secret records. Similarly, the users, groups, or roles who have confidential permission can access confidential, restricted, and unclassified records, but cannot access secret and top secret records. The security classification level for the record depends upon the highest security level specified for the file or filepart in which the record is to be added.
Barcode	The bar code of the record.
Physical Properties	Select one of the following options as follows: **Physical copy with me** - Select this option if a physical copy of the record is available with you. **Physical copy with RMU** - Select this option if there is no current borrower for the record. In this case, the request for the record can be sent to the supervisor or any of the members of the RMU. **Physical copy don't exist** - Select this option if the record does not have a physical copy.

5. Click the **Advanced** tab, and specify the fields in the following sub-tabs:

Fields	Description
DataClass	Select a required data class and specify the valid values of data class fields to associate with the record.

Fields	Description
Global Index	Select a required global index and specify the valid values of global index fields to associate with the record.
Keyword	Enter and add the valid keywords to associate with the record.
Markings	It allows you to select a required name from the Marking Names dropdown list to configure refine search parameters.

6. Click the **Record Type** tab and select a required option from the **Record Type** dropdown list. The additional fields appear to specify. Depending on the record format, the values of some fields are auto-filled.
7. Click the **Record Relations** tab to create the following type of relations with existing records at the time of creating a record:

Tab name	Description
Linking	It allows you to link the related records in your cabinet of a particular task. Refer to the Linking record section for more details.
Versioning	It allows you to create a new version of the record being created. Refer to the Creating versions section for more details.

8. Click **Upload** to continue. Once a record is added successfully, a tick mark appears against the uploaded record.
9. To add another record, click **Add More** and perform the above steps. Otherwise, close the Add Record dialog by clicking the **Close** ✕ icon. The uploaded records appear in the Record pane.

Scanning and uploading records

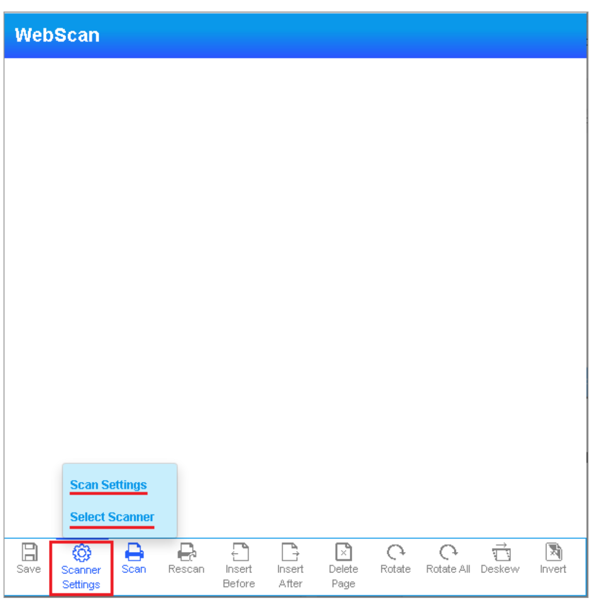
In addition to uploading records using the browse option, it is also possible to upload records using the scan option. The prerequisite to using this feature is that you must have a scanner connected to your machine.

The Scan option appears in the Add Record dialog if OmniScan Hotfix is deployed on the RMS server and the *ScanDisplay* flag is set as "Y" in the *eworkstyle.ini* file.

Perform the below steps to scan and upload a record:

1. Open a required file and click the **Add Record** icon. The Add Record dialog appears.

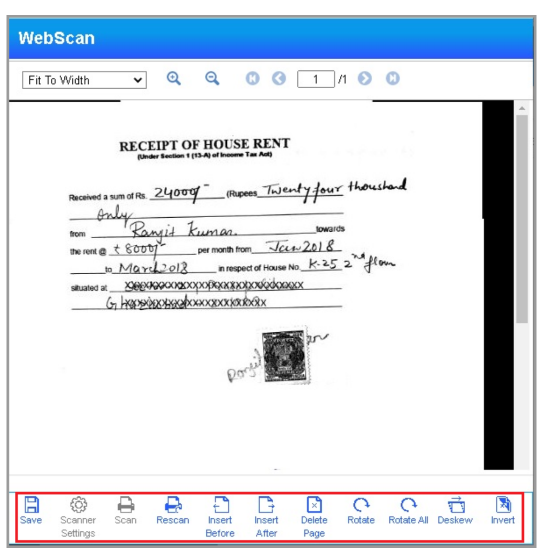
2. Click **Scan** and then **OK**. The WebScan dialog appears.
3. Click **Scanner Settings** to configure the **Scan Settings** and **Select Scanner**.



4. Once the scanner is configured, click **Scan** to scan a record.

After a record is scanned, it appears in the WebScan dialog. The following options are enabled:

Options	Description
Save	It is used to save the scanned record to the RMS Web repository.
Rescan	It is used to rescan the record.
Insert Before	It is used to insert a page before the currently visible page. On clicking it, a dialog appears where you need to select the files to be inserted before the current page.
Insert After	It is used to insert a page after the currently visible page. On clicking it, a dialog appears where you need to select the files to be inserted after the current page.
Delete Page	It is used to delete the current page.
Rotate	It is used to rotate the current page.
Rotate All	It is used to rotate all the pages of the record.
Deskew	Deskew is the process of straightening an image that is either slanting significantly in one direction or one that is misaligned. So, clicking this icon initiates the scanned image straightening or Deskew process.
Invert	It is used to invert the scanned image.



5. Click **Save** to save the scanned record. The saved record appears in the Add Record dialog. The remaining steps are similar as explained in the Adding record section.

Deleting record

To delete a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Delete**. Alternatively, open a specific record, click the Actions ⋮ icon that appears at the top-right corner of the screen, and select **Delete**. The Delete dialog appears.
2. Enter a description in the **Reason** box and click **Confirm**. The message “Record(s) Deleted Successfully” appears.

To delete multiple records simultaneously, perform the below steps:

1. On the Record pane, select the checkboxes against the specific records. The available multiple operations buttons enable.
2. Click **Delete** to continue. The Delete dialog appears. The remaining steps are similar as given above in the procedures for deleting a record.

Opening record in a new tab

To open a record in a new tab, follow the below steps:

1. Go to the Record pane and hover over the name of the required record. The Open in New Tab icon appears.
2. Click the Open in New Tab icon against the required record. The record opens in a new tab.

Viewing and modifying records in Office viewer

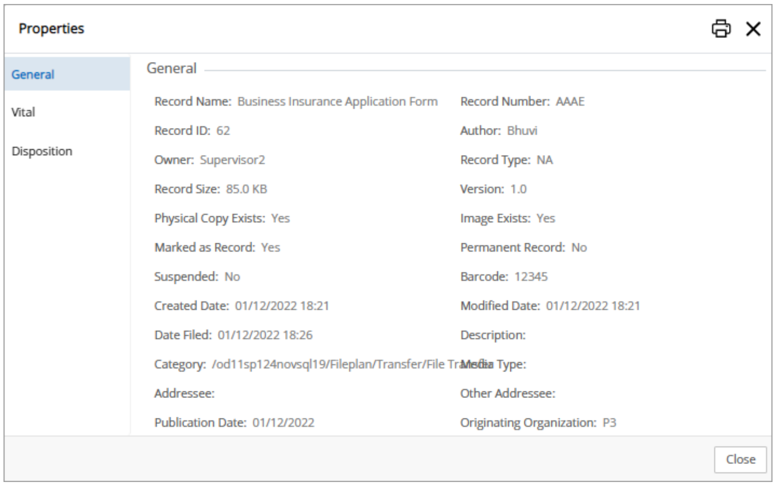
The integration of Office document viewer allows you to view and modify records that are in Word, Excel, and PowerPoint within the RMS interface. Whenever you modify a record, a version of it gets created automatically.

To view and modify records in the Office document viewer, perform the below steps:

1. Navigate to the required record.
2. Open the record to view it in RMS.
3. Click the expand icon to get an expanded view of the record.
   - You can view the records in the DOC, XLS, PPT, DOCX, XLSX, and PPTX formats.
   - The edit functionality is limited to DOCX, XLSX, and PPTX formats.
4. Click the edit icon. The record opens in editable mode.
5. Modify the record as required. Other users (with the right to modify the content) can also co-author it.
   In the case of co-authoring, the changes are visible at the run-time.
   - For optimal performance, it is advisable to have a maximum of 99 users collaborating on the record simultaneously.
   - Ensure to save the record by pressing Ctrl + S before clicking the Save & Finish option.
6. Click **Save & Finish** to save the changes.
   Only the initiator of the record has the ability to save and finish it, while the changes made by co-authors get automatically saved.

Viewing and modifying record properties

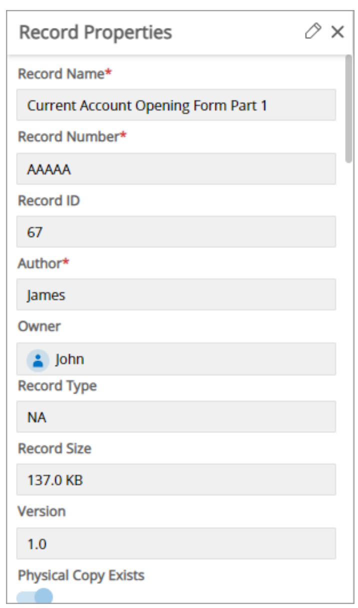
To view the properties of a record, on the Record pane, click the **Actions** icon against a specific record and select **Properties**. You can print the displayed properties by clicking the **Print** icon.



To modify the properties of a record, perform the below steps:

1. Open a specific record. By default, the Record Properties pane appears on the right.

> It is possible to hide or display the Class Properties pane by clicking the **Properties** icon that appears at the upper-right corner of the Record information screen.



2. Click the **Edit** icon. The editable properties fields enable to modify.
3. Modify the required properties. Once the modification is done, the **Save** button appears.
4. Click **Save**. The message “Properties Updated Successfully” appears.

It is possible to view a record in thumbnail view. To display a record in thumbnail view, open a specific record and click the **Thumbnails** icon. The record opens in thumbnail view at the right pane.

Adding notes for a record

It is also possible to add notes for a record.

To add notes for a record, perform the below steps:

1. Open a specific record.
2. Click the **Notes** icon that appears on the operation bar. The Notes pane appears on the right.
3. Enter the notes in **Write Notes Here...** box and click **Post**. The message "Note Added Successfully" appears.
4. Click the **Secure** icon to restrict the visibility of your notes to specific users. The Manage Rights dialog appears. Refer to the Managing sharing rights of record section for managing rights on notes.
5. To filter the notes of a particular user, select a required user name by clicking the **Select Users** dropdown menu.

   In case of long notes, you get a two-three line view of a long note. To view a detailed note, click **More** which appears beside the added note.

Note Sheet:

The Note Sheet feature is available under the Notes pane. Note Sheet provides an aggregated view of all notes added for a record.

1. Click the **Note Sheet** to see the aggregated view of all notes attached to the record. All associated notes of an open record appear with the creation date, time, and page number reference.
2. Click any of the notes and it redirects you to the page to which the selected note is associated.
3. To filter the notes of a particular user, select a required user name by clicking the **Select Users** dropdown menu. This option is available at both the interfaces of Page-specific view as well as Note Sheet view.

   Notes in the Note Sheet can also be secured to restrict the visibility of your notes to specific users. Refer to step 4 in the above procedure.

Creating reference of a record

The Create Reference operation for records allows you to create a copy of a record in any other folder. Once the reference is created, a shortcut icon appears against the record in the destination folder.

To create a reference of a record, perform the below steps:

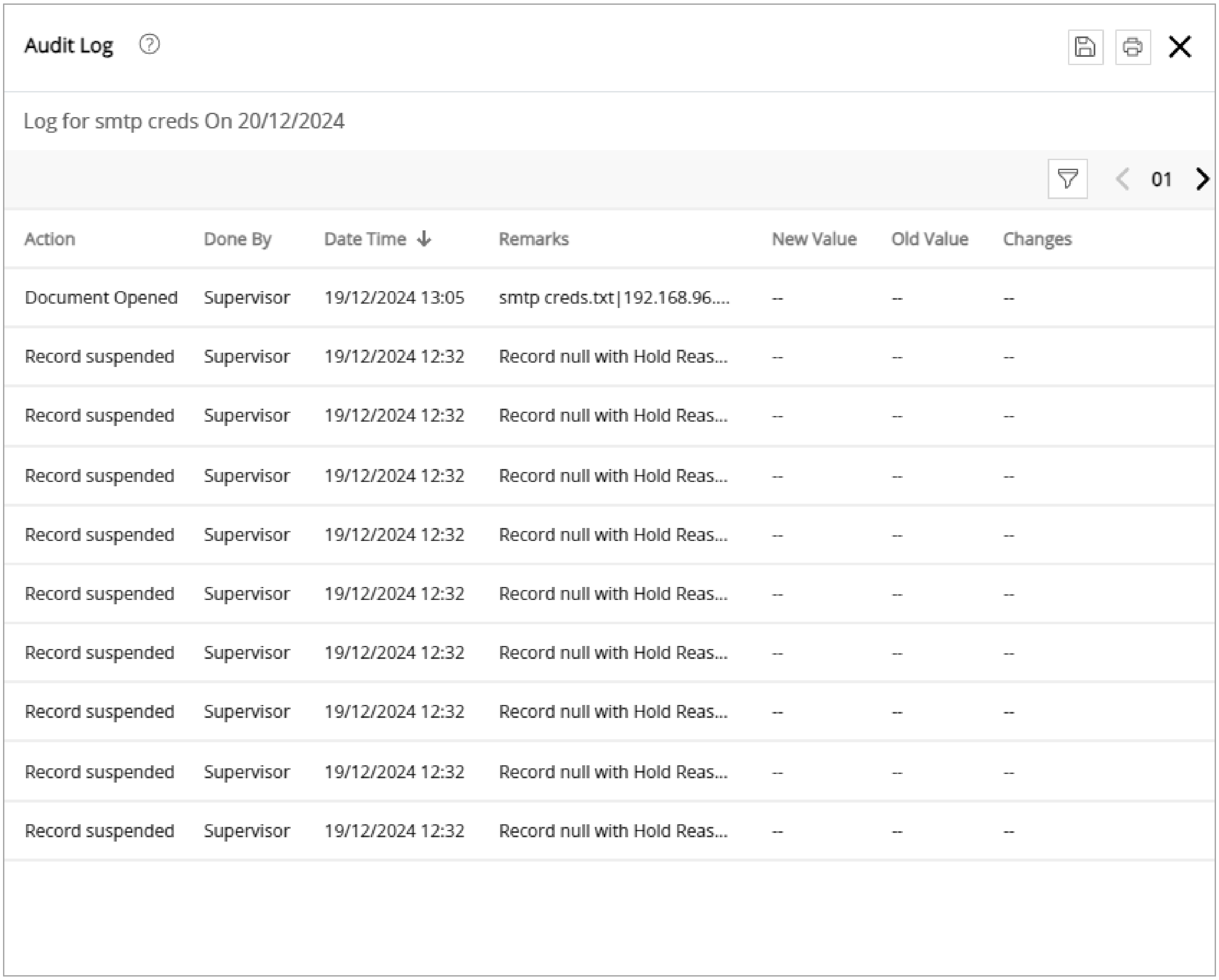
1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Create Reference**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Create Reference**. The Create Reference dialog appears.
2. Select a destination where you want to create the reference of a specific record. The name of the selected destination appears in the **To** box.
3. Click **Create Reference**. The message “Reference Created Successfully” appears.

Viewing audit log of a record

The Audit Log provides a chronological record of operations that are performed on the specified record by any of the members of the cabinet.

To view an audit log of a record, perform the below steps:

To view the audit log of a record, on the Record pane, click the **Actions** ⋮ icon against a specific record and select **Audit Log**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Audit Log**. The Audit Log dialog appears. This dialog displays the list of various operations done by different users in that class.



Audit Log

Log for smtp creds On 20/12/2024

01

Action	Done By	Date Time	Remarks	New Value	Old Value	Changes
Document Opened	Supervisor	19/12/2024 13:05	smtp creds.txt|192.168.96....	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--
Record suspended	Supervisor	19/12/2024 12:32	Record null with Hold Reas...	--	--	--

To print the audit log, click the **Print** icon. The Print dialog appears. Make the required configurations and click **Print**. To save the audit log, perform the below steps:

1. On the Audit Log dialog, click the **Save** icon. The options to save the audit log in the following format appears:
   - Save As xlsx
   - Save As pdf
   - Save As Record
2. To save the audit log in XLS or PDF format, click the respective **Save As xlsx** or **Save As pdf** option. The audit log gets downloaded into your system. In case you want to save the audit log as a record in RMS, then follow the below steps:
   a. Click **Save As Record**. The Save As Record dialog appears.

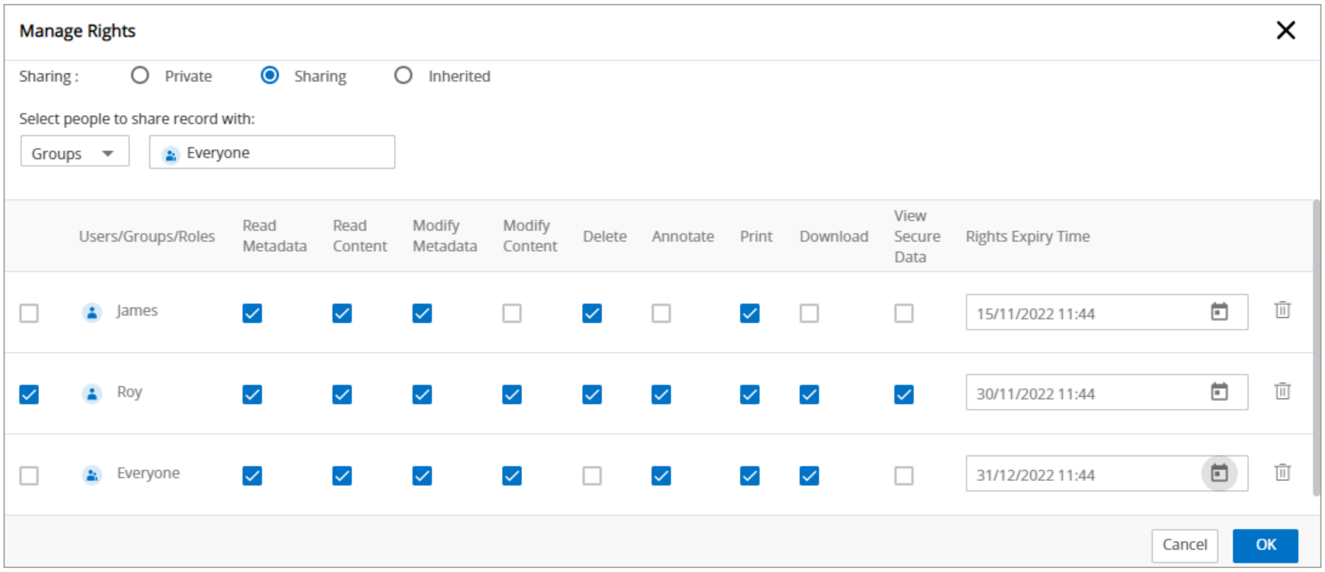
b. Navigate to the desired filepart where you want to save the audit log as a record and click **Done** to continue. The **Basic** and **Advanced** tabs appear.
c. Specify the required details in the **Basic** tab and then in the **Advanced** tab as explained in Adding record section.
In the **Basic** tab, under **Save As**, select a required **pdf** or **xlsx** option to save the audit log in PDF or XLS format.

Managing rights for record

The Manage Rights feature allows you to share the records among the other users of RMS. You can select the groups, users, and roles to assign the rights for shared records such as read, write, create, annotate, delete, and so on. You can also set the expiry time for the rights assigned to the users. Rights on the shared records will be applicable till the time they have been assigned.

To manage sharing rights for a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific class and select **Manage Rights**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Manage Rights**. The Manage Rights dialog appears.
2. Select one of the following sharing types as follows:
   - Private - Select this option if you want to share a record only with the Owner or the Supervisor.
   - Inherited - Select this option if you want to inherit the sharing rights of a record from its parent folder.
   - Sharing - Select this option if you want to share a record among multiple Users or Groups of RMS. The message "Do you want to manage from inherited rights?" appears. Make an appropriate choice and follow the below steps:
3. Select a desired group, user, or role from the dropdown menu and specify the other details as required.
4. Select the checkboxes for rights that you want to assign to the selected group, user, or role. If you want to assign all rights to the added group, user, or role, then click the checkbox displayed before the added name.
5. Click the **Select a date** icon in the **Rights Expiry Time** box to set an expiry period for the selected rights. If you want to remove an added group, user, or role from the list, click the **Delete** icon against it.



6. Click **OK** to continue. The message “Sharing Rights Set Successfully” appears.

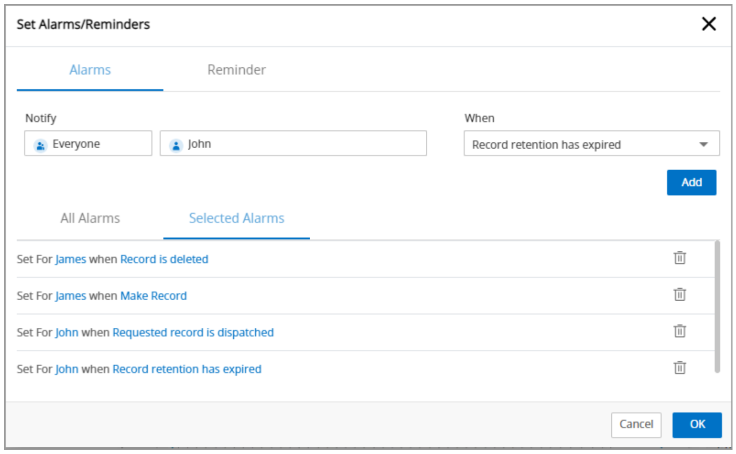
Setting alarms and reminders for record

An Alarm is a notification that is flashed and emailed to the selected members of RMS on the occurrence of the specified event.

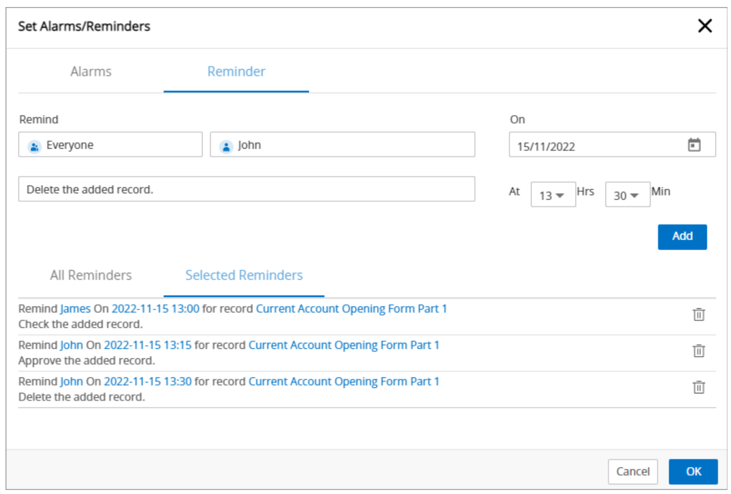
A Reminder is a notification that is flashed and emailed to the selected members of RMS at a specified date and time.

To set alarms and reminders for a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific class and select **Set Alarms/Reminders**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Set Alarms/ Reminders**. The Set Alarms/Reminders dialog appears.
2. In the **Alarms** tab, select a user name for whom you want to create an alarm using the **Notify** boxes.
3. Select an event in the **When** box and click **Add**. The alarms that are already set appear under **All Alarms** while the newly added alarms appear under **Selected Alarms**.
4. Click **OK** to continue. The message "Alarm(s) Added Successfully" appears.



5. Similarly, click the **Reminder** tab, and select a user name for whom you want to create a reminder using the **Remind** boxes.



6. Specify the date and time when the reminder must trigger.
7. Enter a brief description of the reminder and click **Add** to continue. The reminders that are already set appear under **All Reminders** while the newly created reminders appear under **Selected Reminders**.

   Only 255 characters are allowed for comments.

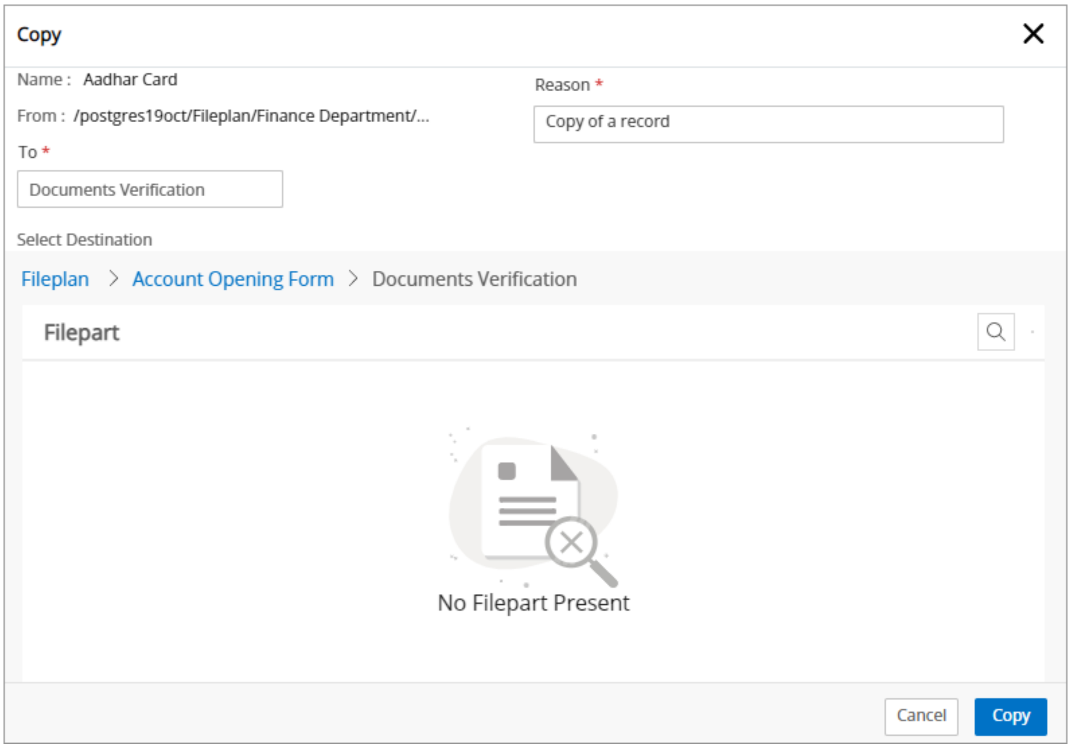
8. Click **OK** to continue. The message "Reminder(s) Added Successfully" appears.

Copying record

The Copy operation of the record allows you to create a copy of any record in the desired location of your fileplan repository.

To create a copy of a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Copy**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Copy**. The Copy dialog appears.
2. Select a destination where you want to create a copy of a record in your fileplan repository. The selected destination appears in the **To** box.
3. Enter a brief description in the **Reason** box.



4. Click **Copy** to continue. The message "Record(s) Copied Successfully" appears. A copy of the desired record is now available at the selected location.

To create copies of multiple records simultaneously, perform the below steps:

1. Select the checkboxes against the required records. The available buttons for multiple operations enable.
2. Click the **Actions** ⋮ icon that appears on the top-right corner of the Record pane and select **Copy**. The Copy dialog appears. The remaining steps are similar as mentioned above in this section.

Moving record

The Move Record operation allows you to move the selected record(s) to some other filepart or file in the fileplan repository.

To move a record, perform the blow steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Move**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Move**. The Move dialog appears.
2. Select a destination where you want to move a record in your fileplan repository. The selected destination appears in the **To** box.
3. Enter a brief description in the **Reason** box.
4. Click **Move** to continue. The message "Record(s) Moved Successfully" appears. The record moves to the selected destination.

To move multiple records simultaneously, perform the below steps:

1. Select the checkboxes against the required records. The available buttons for multiple operations enable.
2. Click **Move**. The Move dialog appears. The remaining steps are similar as mentioned above in this section.

Holding record

The Hold operation of the record allows you to hold records. No policies and rules apply to a record on which a hold is applied during the time of its suspension.

Multiple users can hold a record at a time so that if one user releases the record, it does not go into the destruction processing as some other users might still have a requirement of that record. Once a record is put on hold, the Hold operation disables only for those users who have applied hold to the record. For others, the Hold operation remains enabled.

Any RMS user who applies hold to a record can release the same record for other users as well.

To apply a hold on a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Hold**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Hold**. The Hold dialog appears.
2. Select the **Hold Type** from the drop-down and enter a brief description in the **Reason** box.
3. Click **Hold** to continue. The message "Record(s) Successfully put on hold" appears.

To apply a hold on multiple records simultaneously, perform the below steps:

1. On the Record pane, select the checkboxes against the specific records on which you want to apply hold.
2. Click the **Actions** ⋮ icon at the top-right corner of the Record pane and select **Hold**. The Hold dialog appears.
3. Select the **Hold Type** from the drop-down and enter a brief description in the **Reason** box.
4. Click **Hold** to continue. The message "Record(s) Successfully put on hold" appears.

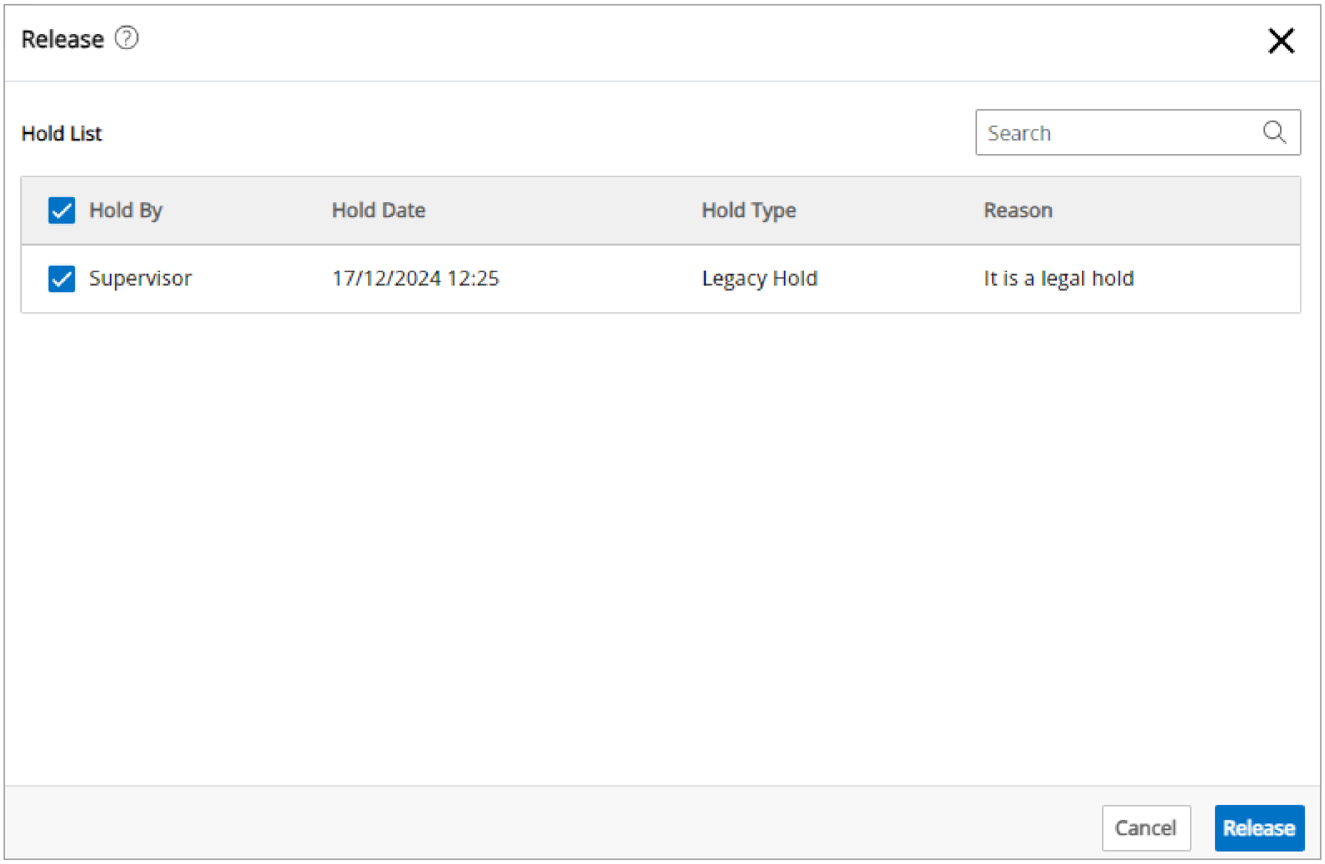
Releasing record

The Release operation of the record allows you to release a record that is put on hold. When you release a record, all the record policies and rules apply to the record. The release operation for any record is enabled for only those users who have applied a hold to that record.

Any RMS user who has applied a hold on the record can release the same record for other users as well.

To release a record on which hold is applied, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Release**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Release**. The Release dialog appears.



2. Select the checkboxes against the user names for whom you want to release the record.
3. Click **Release** to continue. The message "Record(s) Reeased Successfully" appears.

To release multiple records simultaneously, perform the below steps:

1. On the Record pane, select the checkboxes only for the records for which the hold is applied. On selecting multiple checkboxes, the **Release** button is enabled at the top-right corner of the Record pane.
2. Click **Release** to continue. The Release dialog appears.
2. Select the checkboxes against the user names for whom you want to release the record.
3. Click **Release** to continue. The message "Record(s) Released Successfully" appears.

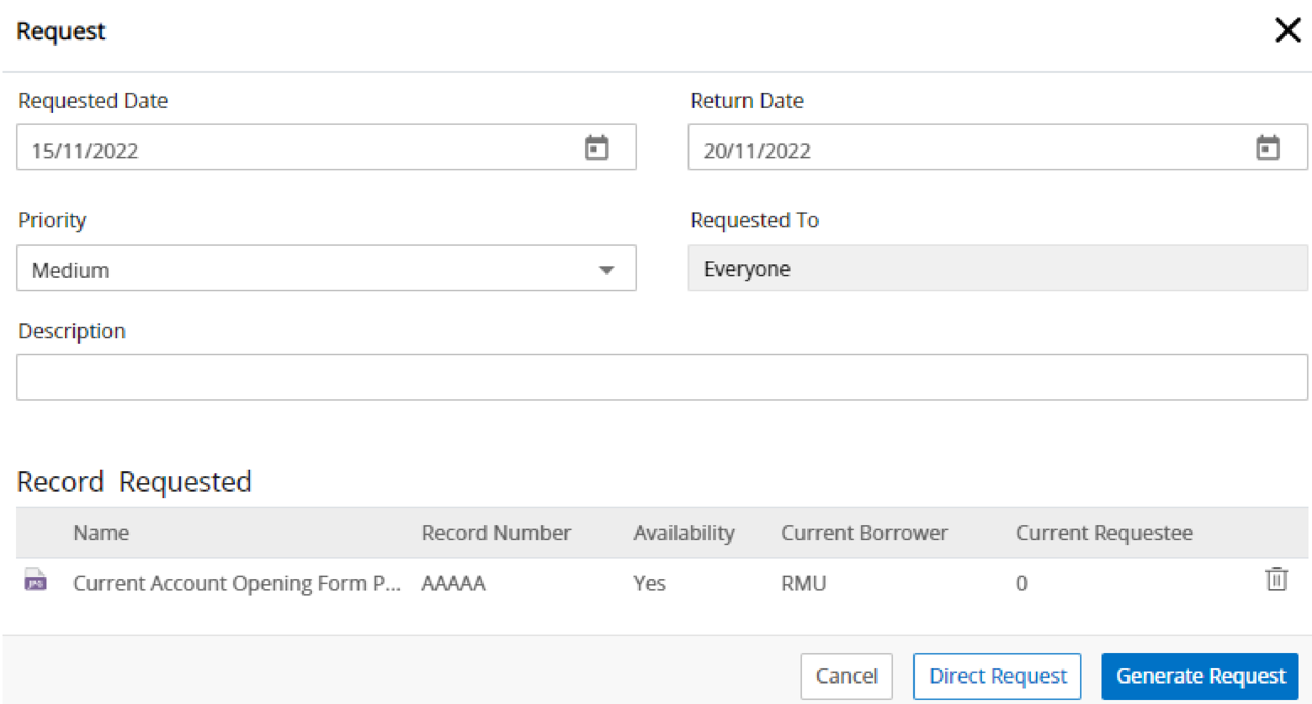
Requesting record

The Request operation allows you to request records. When a request is made, the corresponding information is passed to whom the request is made. You can see the requests made to you in the Incoming Requests interface of the RMS Process in OmniDocs Web, and Grant or Reject the requests.

The items requested are clubbed under a request number so that you can directly grant or reject all the items straightaway. You can also grant or reject items under this request number individually.

To request a record, perform the below steps:

1. Go to the Record pane and click the **Actions** icon against a specific record.
2. Select **Request**. The Request dialog appears. The specific record appears in the Record Requested list. If required, you can remove a record from this list by clicking the **Delete** icon against a specific record.



3. Specify the following details:

Fields	Description
Requested Date	The date on which the record is required. By default, the current date is pre-filled.
Return Date	The date on which the record will be returned. By default, this date is pre-filled which is calculated based on the Borrow period defined by RMS Admin.
Priority	Priority of the request. It can be Low, Medium or High.
Request To	User, Role, or Group to whom the request is made.
Description	Description of the request.

4. Click one of the following options:
   - Direct Request - Select this option if you want to make a direct request to the current borrower of the record.
   - Generate Request - Select this option if you want to make a request to the owner of the record.

   The dialog appears showing the summary and status of the request made. You can take a print by clicking the **Print** icon, or else close the dialog.

Linking records

The Links operation allows you to club the related available records in your cabinet of a particular task.

To link a record, perform the below steps:

1. Open a specific file.
2. In the Record pane, click the **Actions** icon against a specific file and select **Links**. The Links dialog appears. By default, the **Linked Records** tab opens displaying the existing linked Records.

> To open a linked record in a separate browser tab, you can click the Record ID corresponding to the required Record Name.

3. Click the **Link New Records** tab and select the required record(s) available in the fileplan repository.
4. Select a suitable option from the **Link Type** dropdown menu.

5. Click **Link**. The message “Record Linked Successfully” appears. The name of the linked file appears in the **Linked Records** tab.

To remove the linked record, perform the below steps:

1. Go to the **Linked Records** tab.
2. Select a linked record that you want to remove. The **Delete** button appears.
3. Click **Delete** to remove the linked record.

Downloading records

The Download operation allows you to save copies of the records to your local machine.

To download a record, on the Record pane, click the **Actions** ⋮ icon against a specific record and select **Download**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Download**. The record gets downloaded to your local machine.

To download multiple records, perform the below steps:

1. On the Record pane, select the checkboxes against the specific records. On selecting multiple checkboxes, the available buttons for multiple operations enable.
2. Click the **Actions** ⋮ icon that appears at the top-right corner of the pane, and select **Download**. The select records get downloaded to your local machine.

Depending on your local machine's browser settings, you may be asked to choose a location where you want to save the records. In the case of multiple records, the selected records are downloaded as a Zip file.

Making record

The Make Record operation allows you to convert a document into a record. Unlike a record, all the record policies and rules apply to a record.

The Make Record operation does not appear for checked-out records.

To convert a document into a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Make Record**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Make Record**. The Make Record dialog appears.
2. Click **Confirm** to continue. The message “Record(s) Made Successfully” appears.

To convert multiple documents into records, perform the below steps:

1. On the Record pane, select the checkboxes against the specific records. On selecting multiple checkboxes, the available buttons for multiple operations are enabled.
2. Click the **Actions** ⋮ icon that appears at the top-right corner of the pane, and select **Make Record**. The Make Record dialog appears.
3. Click **Confirm** to continue. The message “Record(s) Made Successfully” appears.

Once a document converts to a record, the following operations are disabled:

- Create Reference
- Checkout or Check-in
- Version Change
- Modify Properties
- Annotations cannot be applied

Checking-out or checking-in record

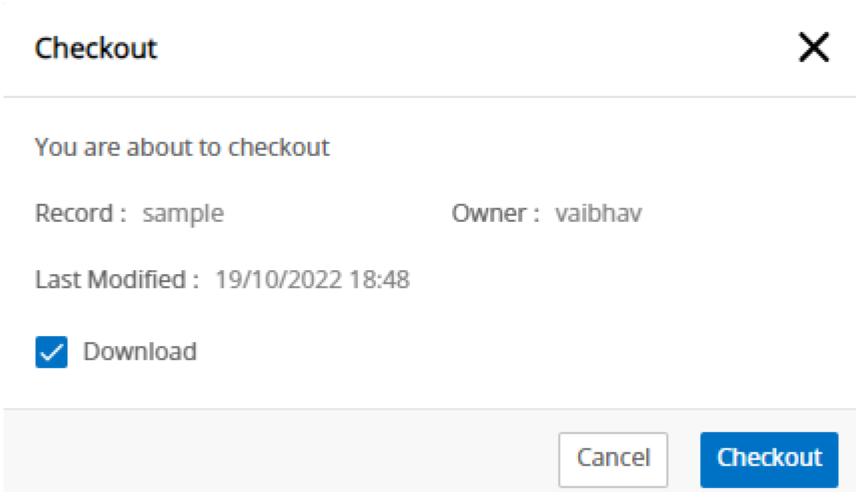
The below table describes the actions related to the check-out and check-in functionality of records:

Actions	Description
Checkout	• It allows you to get a lock of the record so that only you can make changes to it. • Other users can still view the checked-out record but cannot modify it.

Actions	Description
Checkin	• It allows you to upload the checked out record back into the repository (in the same folder from where it was checked out). • Once checked in, the lock is released, and a new version of the record is created. • Other users can now access the record in reading and write modes (if they have the rights).
Undo Check Out	• If you do not feel the need to upload a new version, you may undo the check-out. • In doing so, the check-out must be canceled and the record must be checked in again without the creation of a new version.
Versions	• To create a new version, check-out the record and then check-in the new version. • This feature allows you to keep track and baseline your work. To create a version, refer to the Creating versions section.

To check-out a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Checkout**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Checkout**. The Checkout dialog appears.



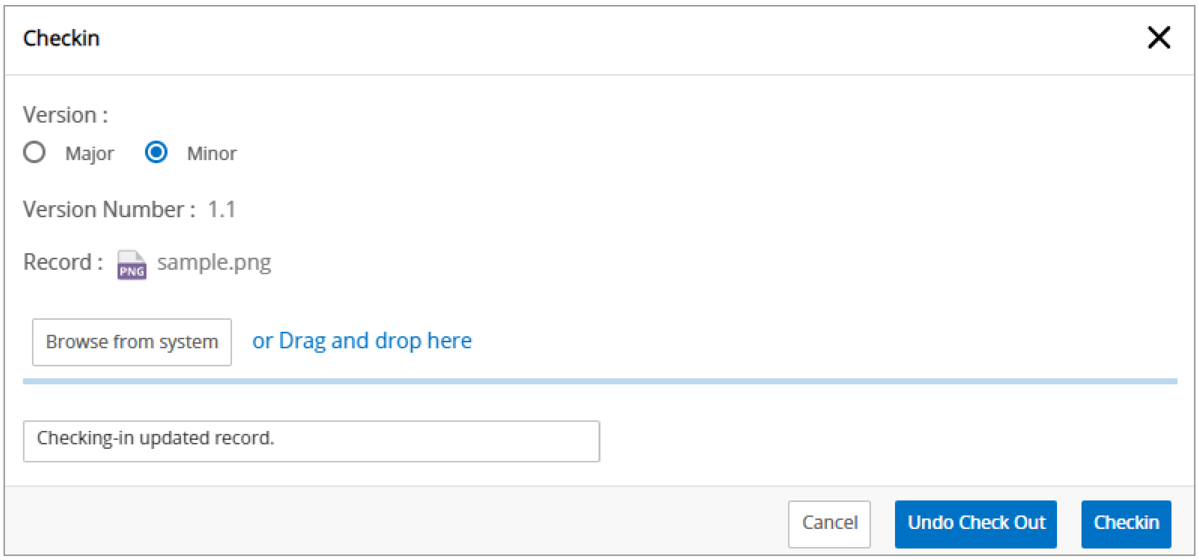
If you want to download the record to your local drive to work offline, then click the checkbox against **Download**, otherwise, move to the next step.

2. Click **Checkout** to continue. The message "Record Checked out Successfully" appears.

You can check-in a checked-out record again, once you have made the required changes in the checked-out record.

To check-in a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Checkin**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Checkin**. The Checkin dialog appears.



2. Select or specify the following details:

Fields	Description
Version	**Major** - If the new version is selected as Major then it is marked as 1.0, 2.0, 3.0, and so on. **Minor** - If the new version is selected as Minor then it is marked as 1.1, 1.2, 1.3, and so on.
Version Number	It is non-editable and the numbering system depends on the type of version selected.
Record	**Browse from system** - Click it to locate and select the required record from your local drive. **Drag and Drop** - Drag the required record from your local drive and drop it in the Checkin dialog.

Fields	Description
Add Version Comments	Specify a comment that describes the changes made. This helps you to locate a specific version later.
Undo Check Out	• Click it to discard check-out. It can be used if you do not feel the need to upload a new version. • On undoing check-out, the check-out is canceled and the record is checked in again without the creation of a new version. The message "Record undo checked out Successfully" appears.

3. Click **Checkin** to continue. The message "Record Checked-in Successfully" appears.

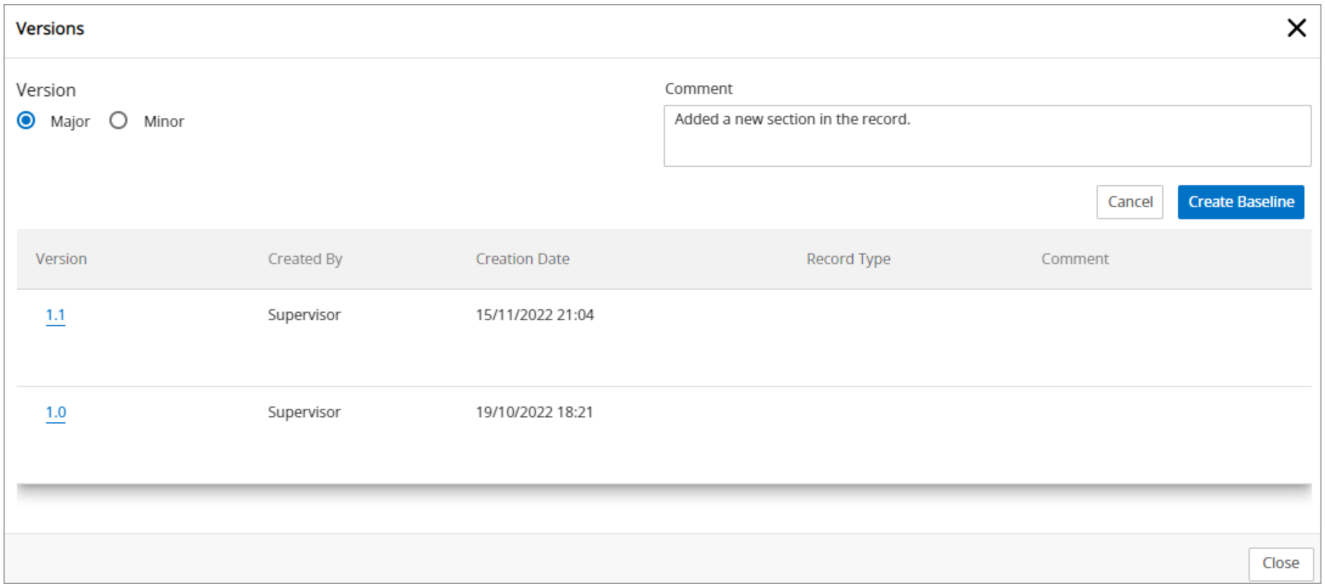
Creating versions

The Versions operation for a record allows you to keep track of all the versions of a record. You can create a new version, set an existing version as the latest version, and delete an existing version.

To create a new version, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Versions**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Versions**. The Versions dialog appears. It displays a list of the existing versions of a record. By default, when a record is created, it is marked as version 1.0.
2. Click **Create Baseline** and specify the following details:

Fields	Description
Minor	If the new version type selected is Minor then it is marked as 1.1, 1.2, 1.3, and so on.
Major	If the new version type selected is Major then it is marked as 1.0, 2.0, 3.0, and so on.
Comments	Enter the version comments for reference.

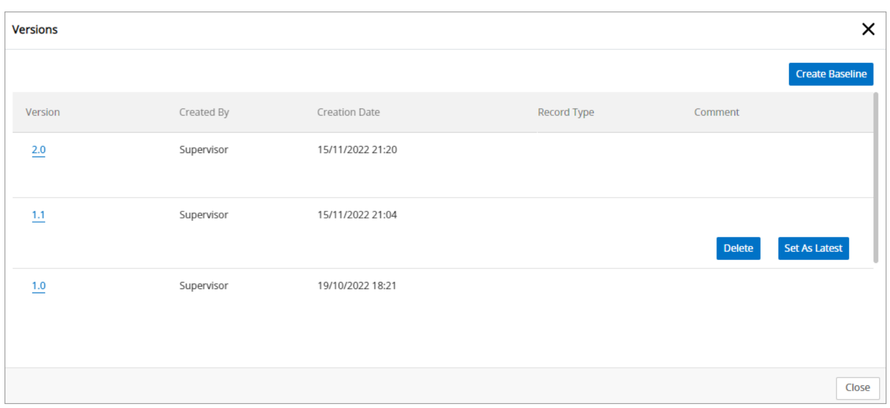


3. Click **Create Baseline** to continue. The message “Version Created Successfully” appears.

Once you create multiple versions of a record, you can set any of the versions as the latest. You can also delete a version that is not required.

To set any version as the latest, perform the below steps:

1. On the Version dialog, click an existing version except for the latest version. The **Delete** and **Set As Latest** buttons appear under the clicked version.



2. Click **Set As Latest**. The message “Version is set as latest Successfully” appears.

   Similarly, to delete a version, click **Delete**. The message “Version Deleted Successfully” appears. The deleted version removes from the list of versions.

Forwarding record

The Mail operation allows you to forward a record as an attachment or link along with its location to different users.

To forward a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Mail**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Mail**. The Mail dialog appears.
2. Specify the following fields:

Fields	Description
To	Name of the recipient to whom the record is to be sent. Use the **Add** button to add a recipient whose name does not appear in the dropdown list.
CC	Click **CC** to add Carbon Copy recipients.
BCC	Click **BCC** to add Blind Carbon Copy recipients.
Subject	Enter the subject lines. By default, the names of the attached or linked records appear in the **Subject** box.
Send As	Select **Attachment** to forward the records as attachments. Select **Link** to forward links of the records. If this option is selected, then the following fields appear to specify: ● Link Expiry in ● Select User Type
Link Expiry in	It is used to set an expiry time for the links. A maximum of 30 days can be set as the expiry time.

Fields	Description
Select User Type	The record link can be forwarded to an SSO user or internal user or an external user. In case the link is sent to an internal user, then the recipient user must enter login credentials to access the records. In case the link is sent to an external user, then provide a passcode that will be used by the recipient user to access the records along with a username and password. Contact to your administrator to get the username and password that are entered in the *eworkstyle.ini* located at path *<Application server root path>\bin\ngdbini\Custom\<cabinet_name>*. In case the SSO is not set up on the machine, the SSO login option will not be visible.
Message	Enter the message. By default, the names of the selected records appear in the message textbox. You can type your own message as per requirement.

3. Click **Send** to continue. The message “Message Sent Successfully” appears.

The users receive an email containing the File Name and Path of the record. Use the **Click to view** link to navigate to the corresponding record.

> To receive the file path in the email, the recipient user must ensure that the following HTML file exists at the *jboss-eap-7.4\bin\Newgen\NGConfig\ngdbini\Custom\cabinetname\rmswebini\mailTemplates* location:
>
> - forwardBody.htm
> - forwardBodyAsAttachment.htm
> - forwardBodyFile.htm
> - forwardBodyFilepart.htm

To forward multiple records, perform the below steps:

1. On the Record pane, select the checkboxes against the specific records. On selecting multiple checkboxes, the available buttons for performing various operations on the selected record appear.
2. Click the **Actions** ⋮ icon that appears at the top-right corner of the pane, and select **Mail**. The Mail dialog appears. The remaining steps are similar as mentioned above.

The mail recipients must perform the following actions to access the forwarded records:

- If the records are forwarded as attachments, then open the mail inbox and save the attached record.
- If the records are forwarded as links:
    - For Internal User:
        - Open your mail inbox.
        - Click the record link. If there are multiple records, then the records link appears against each record. The RMS Web sign-in page appears.
        - Sign in to RMS Web using your username and password. On successful sign-in, the record appears.
    - For External User
        - In case the link is sent to an external user, then access the record based on the configuration done in the system Web API.
        - The record is forwarded with some passcode for security reasons. To access the forwarded record, external users must enter the same passcode set by the sender while sending the mail.

Record Renditions

The Record Renditions operation allows you to create multiple record copies in different file formats. It is useful when you do not have a specialized application to view the record of a particular file format. For example, you may have the application to view the PDF format but not the Microsoft Word format. In that case, you can create a PDF rendition of the Microsoft Word record.

To add rendition for a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Record Renditions**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Record Renditions**. The Record Renditions dialog appears displaying the list of renditions of the selected record, if any.
2. Click **Add New Renditions**. The Add New Renditions dialog appears with two options:
    - **Upload From System**:

a. Click **Browse** or **drag and drop** the records to add renditions. The selected records appear.

> - You can remove the added record from the list by clicking the **Close** icon against a record.
> - You can add more records by clicking **Add More**.
> - You can not upload the file in the same format as that of the record.

b. Click **Add** to continue. The records are uploaded, and the status as Success is displayed.

- **Convert Existing Record**:
  a. Use the dropdown to select **TIF** for converting a PDF file to a TIF file.
  b. Click **Convert** to save the changes.

3. Close the dialog or click **Back** to see the added records.

To remove a rendition, on the Record Renditions dialog, click the **Delete** icon against a specific rendition. The message “Link Rendition Removed Successfully” appears.

To download the rendition, on the Record Renditions dialog, click the **Download** icon against a specific rendition. The rendition is downloaded in the same format.

Setup supersede relationship

The Setup Supersede Relationship operation allows you to supersede the record being created with any existing record.

To setup supersede relationship, perform the below steps:

1. On the Record pane, click the **Actions** icon against a specific record and select **Setup Supersede Relationship**. Alternatively, open a specific record, click the **Actions** icon that appears at the top-right corner of the screen, and select **Setup Supersede Relationship**. The Setup Supersede Relationship dialog appears. It has the following two tabs:

Tab name	Description
Superseded Records	It allows you to view and remove the already superseded records.
Supersede New Records	It is used to create a supersede link with new records.

2. Click **Supersede New Records** tab.

3. Navigate to a record in the fileplan repository to select it.
4. Click **Supersede**. The message “Record Superseded Successfully” appears.

To delete a superseded record, perform the below steps:

1. On the Setup Supersede Relationship dialog, click the **Superseded Records** tab.
2. Click a specific record. The **Delete** button appears.
3. Click **Delete** to continue. The message “Superseded Record Deleted Successfully” appears.

Printing record

The Print operation prints the details of existing records. You can print all the properties of the records or use a selective printing method. In the selective printing method, you select specific properties to print based on your requirements.

To print a record, perform the below steps:

1. On the Record pane, click the **Actions** ⋮ icon against a specific record and select **Print**. Alternatively, open a specific record, click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select **Print**. The Select columns for printing dialog appears.

   The Select columns for printing dialog appears in the list view only.

2. Select the properties you want to print.
   If you want to print all the properties, then select the **Select All** option.
3. Click **Print**. The Print dialog appears.
4. Make the required configuration and click **Print** to continue. The selected record is sent to the printer configured with your machine.

Custom operations record

The RMS Admin module allows the administrator to create custom operations for records. Once a custom operation is created, you can access it from the **Actions** list of records in the RMS Web module.

To access a custom operation for a record, on the Record pane, click the **Actions** ⋮ icon against a specific record and select the required custom operation. Alternatively, open a specific record and click the **Actions** ⋮ icon that appears at the top-right corner of the screen, and select the required custom operation. The custom operation associated with the record appears.

To access a custom operation for multiple records simultaneously, click the checkboxes against the desired records. Click the **Actions** ⋮ icon that appears at the top-right corner of the Record pane and select the required custom operation. The custom operation associated with the record appears.

Filtering records

The Filter feature allows you to sort listed records based on certain criteria.

To apply a filter on records, perform the below steps:

1. On the Record pane, click the **Filter** icon. The filter dialog appears.
2. Based on the user preferences the following fields appear to specify:

Fields	Description
Name	Enter the name of the required record.
Record Number	Enter the record number of the required record.
Modified Date	Select the date range (From-To) between which the required record was modified.
Physical Copy Exists	Select the option to specify whether the physical copy of the record exists or not.
Security Classification	Select an option to apply an appropriate level of security. The levels of security classification are as follow: • Top Secret • Secret • Confidential • Restricted • Unclassified
Owner	Enter the owner's name of the required record.

Fields	Description
Created Date	Select the date range (From-To) between which the required record was created.
Data Class	Select the data class associated with the required record.
Barcode	Enter the required record barcode.

3. Click **Apply** to view the results.

Working on paper profile

The Paper Profile is a paper-based record that does not have an electronic copy. You can add a paper profile to the RMS hierarchical fileplan. It helps to physically track of a paper profile.

When you open a specific paper profile, you can only view and modify its properties. As a paper profile does not have an electronic copy, therefore, the record preview is not available for it.

After adding a paper profile, the various operations that can be performed on it are tabled below. The procedure to perform these operations are similar as explained for records. The only difference is that you must act on a Paper Profile instead of a Record.

• Properties	• Delete	• Download	• Copy
• Create Reference	• Move	• Make Record	• Custom Operations
• Audit Log	• Hold or Release	• Versions	
• Manage Rights	• Request	• Renditions	
• Set Alarms/Reminders	• Links	• Setup Supersede Relationship	

Adding paper profile

To add a paper profile, perform the below steps:

1. On the File or Filepart pane, click the **Actions** icon against a specific file or filepart and select **Add Paper Profile**. Alternatively, open a specific file, and on the Record pane, click the **Add Paper Profile** icon. The Add Paper Profile dialog appears.
2. Specify the required details in the **Basic** tab as follows:

Fields	Description
Record Name	Enter record name.
Record Number	The number of this record.
Publication Date	Select publication date.
Originating Organization	Enter the name of the organization.
Author	Enter the author name of the record.
Physical Properties	Select one of the following options as follows: **Physical copy with me** - Select this option if a physical copy of the paper profile is available with you. **Physical copy with RMU** - Select this option if there is no current borrower for the paper profile. In this case, the request for the paper profile can be sent to the supervisor or any of the members of the RMU. **Physical copy don't exist** - Select this option if the paper profile does not have a physical copy.
Security Classification	Select an option to apply an appropriate level of security. The levels of Security Classification are as follow: ● Top Secret ● Secret ● Confidential ● Restricted ● Unclassified The Security Classification level of the paper profile depends upon the highest security level specified for the file or filepart in which the paper profile is to be added.
Barcode	The bar code of the paper profile.

3. Click the **Advanced** tab to specify the following fields:

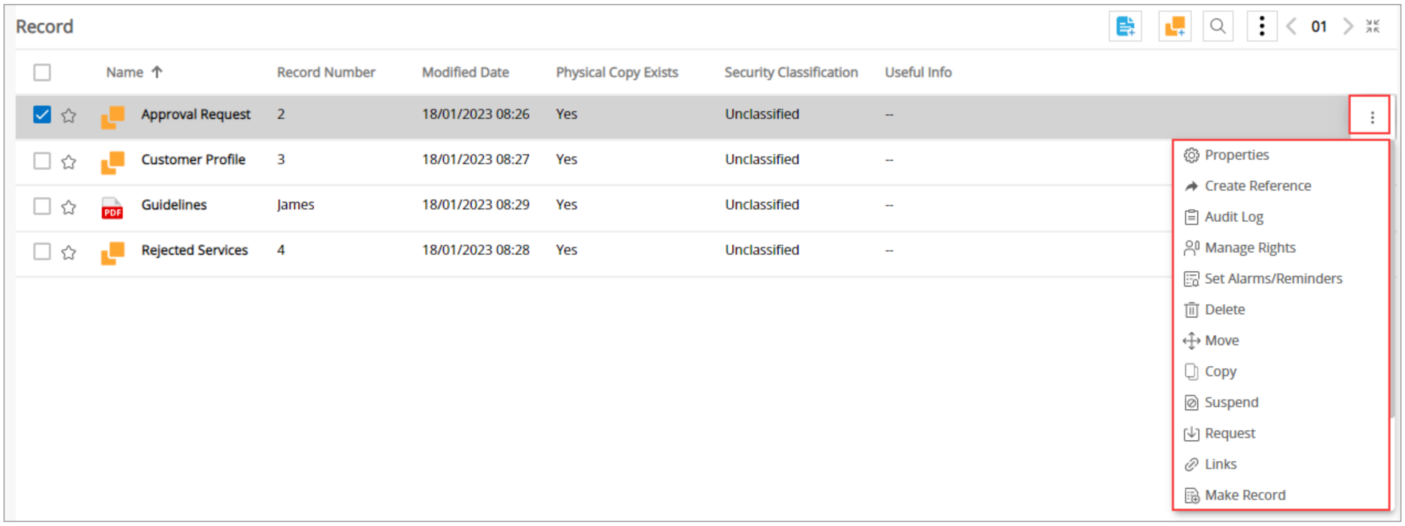
Fields	Description
Dataclass	Select a required data class and specify the valid values of data class fields to associate with the paper profile.
Global Index	Select a required global index and specify the valid values of global index fields to associate with the paper profile.
Keyword	Select the keyword to be associated with the paper profile from the available values. A new keyword can also be added here itself.
Markings	The Marking Management feature allows you to configure refine search parameters. Select Marking Names and Marking Values from the associated dropdown lists.

4. Click the **Record Relations** tab to create the following type of relations with existing paper profiles at the time of creating the paper profile:

Tab name	Description
Linking	It allows you to club the related paper profiles in your cabinet of a particular task. Refer to the Linking records section for more details.
Versioning	It allows you to create a new version of the paper profile being created. Refer to the Creating versions section for more details.

5. Once the paper profile properties are defined, click **Add**. The message “Paper Profile Added Successfully” appears. The added paper profile appears in the list of Records.

To access the various operations associated with an existing paper profile, click the **Actions** ⋮ icon against the paper profile. A dropdown list appears showing the various operations that can be performed on a paper profile.



OpAll Viewer

The OpAll Viewer is a highly advanced, lightweight HTML5 viewer, like a document viewer that provides the functionality of viewing document images of various industry-standard formats in different view modes. HTML5 Viewer allows you to view and edit plain as well as annotated images in file formats such as TIFF, BMP, GIF, JPEG, and HTML documents. Transfer of image and annotation data between server and client takes place through the Hypertext Transfer Protocol (HTTP).
Image operations such as Print, Zoom, Rotate, Negate, Flip (Vertical and Horizontal), and so on, are affected directly by the downloaded image through appropriate method calls. The OpAll Viewer ensures superior image quality, flicker-free panning, and dragging, independent of the viewing mode and state.
It allows you to view both image and non-image records in the Newgen OmniDocs RMS Web application. The record properties, notes, and annotations attached to the record are also displayed in this application.

The OpAll Viewer supports image file formats such as TIFF, BMP, GIF, JPEG, and HTML documents. It also supports Vector PDF.

Non-image records are invoked in the browser, and image records are invoked in the OpAll Viewer. In case OIVT is installed on the server machine, you are provided with an option to set your preferences to view the record.

OpAll viewer operations

The OpAll viewer is used to display a record. The operations available on the OpAll Viewer screen are as follows:

- Record toolbar
- OpAll Viewer standard toolbar
- OpAll Viewer annotation toolbar

Record toolbar — The record toolbar acts as a shortcut to various operations that you can perform on an open record. The different icons appearing on the record toolbar are as follows:

Operations	Description
Refresh	It is used to refresh the page. On clicking this icon, the page will reload displaying any modifications done to the record and its properties.
Expand	It is used to expand the viewable area of the record. On clicking the expand icon, the left pane is taken over by the OpAll Viewer for an expanded view.
Collapse	It is used to collapse the viewable area to the default size. This icon appears if the record is opened in the expanded view.
Thumbnail Preview	It displays the thumbnail view of the record opened in the OpAll Viewer.
Navigation	It is used to traverse to the next and previous record.

OpAll Viewer standard toolbar — The various icons displayed on the standard toolbar are listed below. To learn how to use them, refer to the Standard Tool Bar section of the *OpAll Viewer User Guide*.

Operations	Description
Selection	This is used to enable or disable text selection mode for vector pdf. On clicking this button you can select text. The selected text will be highlighted and you can copy the highlighted text.
Print	It is used to print the currently displayed image or vector pdf with or without annotations.

Operations	Description
Flip Horizontal	It is used to flip the selected image horizontally. Not applicable to vector pdfs.
Flip Vertical	It is used to flip the selected image vertically. Not applicable to vector pdfs.
Rotate Right	It is used to rotate the selected image clockwise
Rotate Left	It is used to rotate the selected image anticlockwise.
Deskew	It is used for automated correction of skew in the image by rotating the image. Only images with sufficient textual content are eligible for auto-deskew functionality.
Negate	It is used to view the current image with an inverted color scheme. Not applicable for vector pdfs
Increase Brightness	It is used to increase the brightness of the selected image. Not applicable for vector pdfs.
Decrease Brightness	It is used to decrease the brightness of the selected image. Not applicable for vector pdfs.
Fit to Width	Depending upon the size of the viewer area, the image fits to the given width.
Fit to Height	Depending upon the size of the viewer area, the image fits to the height at a certain zoom percentage
Fit to Page	Depending upon the size of the viewer area the whole image fits into the viewer.
1 /1 Page Navigation	It is used for page navigation. First Page, Previous Page, Textbox to jump to the particular page, Next Page, and Last Page.
100% Zoom	It is used to view the record at various zoom percentages.
Zoom Lens	It is used to display any selected area of the record in an enlarged view.
Zoom In	This option is used to increase the magnification of the current page.

Operations	Description
Zoom Out	This option is used to decrease the magnification of the current page.
Dynamic Zone	It is used to crop and save a particular portion of the image in JPEG format at a specified path.
Hide Annotation	It is used to hide annotations applied to the record.

OpAll Viewer annotation toolbar — The various icons displayed on the annotation toolbar are tabled below. To learn how to use them, refer to the Annotation Tool Bar section of *OpAll Viewer User Manual*.

Operations	Description
Save Annotation	Saves the applied annotations on the current record.
Undo	Enables you to revert the immediately preceding annotation action carried out.
Redo	Enables you to redo the immediately preceding undo operation carried out.
Line Annotation	• **Solid Line Drawing** — It is used to draw a solid line. • **Dashed Solid Line Drawing** — It is used to draw a dashed line. • **Leading Arrow Line Drawing** — It is used to draw an arrow starting from the tip of the line. • **Trailing Arrow Line Drawing** — It is used to draw an arrow leaving behind a trail. • **Double Arrow Line Drawing** — It is used to draw a line having arrowheads on both sides.
Rectangle Group	• **Rectangle Drawing** — It is used to draw an empty rectangle. • **Solid Rectangle Drawing** — It is used to draw a filled rectangle.
Ellipse Group	• **Ellipse Drawing** — It is used to draw an empty ellipse. • **Solid Ellipse Drawing** — It is used to draw a filled ellipse.

Operations	Description
Wipe Out Drawing	It is used to wipe out some part of the image using a black or white Rectangle.
Highlight Drawing	It is used to highlight the selected text.
Free Hand Drawing	It is used to perform freehand drawing over the record.
Insert Text	It is used to insert text in the record wherever required.
Sticky Notes	It is used to insert a sticky note text in the record wherever required.
Image Stamp	It is used to select an image stamp and insert it anywhere on the selected image. You can also view the preview of Image Stamps before using them. On clicking this icon, a list of registered stamps will appear for selection.
Text Stamp	This option is used to select a text stamp and insert it anywhere on the selected image. You can also view the preview of text stamps before using them.
Attach a Note	It is used to attach a note in the selected area of the image.
Secure Annotation	The Image View OpAll, in which image records are viewed from OmniDocs RMS Web, is multi-user compatible. As many users can access, view, and modulate the images according to their requirements. Annotation Groups have been added as a security feature. Groups imply that the applied annotations can be stored under a common heading or headings. Once these groups are created, the administrator can define different levels of rights for various groups to different users. To create a secure annotation, refer to creating a secure annotation.
Delete Annotation	This option is used to delete selected annotations of the current image.

The system provides the flexibility to get the annotations saved automatically through the auto-save annotation feature. Depending on the type of flag enabled for this feature, the annotation can be saved in three ways.

Firstly, you must click **Save annotation**. In a second way, the users get a dialog box whether they want to save the annotations or not. Thirdly, the annotation is auto-saved. In the case of the third way, the annotation is saved when a page is changed, any page is searched, or if you are navigating to any other tab of OmniDocs RMS. The tag for this feature is available in *eworkstyle.ini* by the name **autoSaveAnnotation**.

To create secure annotations, Perform the below steps:

1. Annotate the record as required and save it.
2. Click the **Secure Annotation** icon. A dialog box appears to create secure annotations.
3. Select the required **Annotation Group**.
4. By default, all groups defined will possess inherited rights. To assign Private rights to the group, select **Mark as Private** option.
5. To assign Shared rights to the group, select the **Shared** option.
6. Add the Groups, Users, or Roles.
7. To assign inherited rights to the group, select the **Inherited** option.
8. Click **Save** to save the secure annotation definition.

To assign rights on different annotation groups, you must have the privilege of Assign Rights which is set from the OmniDocs Administration module.
To assign rights to annotation groups, you must either be a Supervisor or Owner of the record or must have modifying rights on the record.

Non-image record operations

The non-image record opens in its native application. The prerequisite for opening a non-image record is that the machine must have the native application of the record.

For example, a DOC record: As per prerequisite, the machine is installed with the Microsoft Word application.

1. Click a DOC-type record. The record details screen appears. As Microsoft Word is not supported by the OpAll Viewer, you need to download this record to view it.
2. Click **Download** to save the record to your local drive.
3. Open the downloaded record. It appears in the native Microsoft Word application.

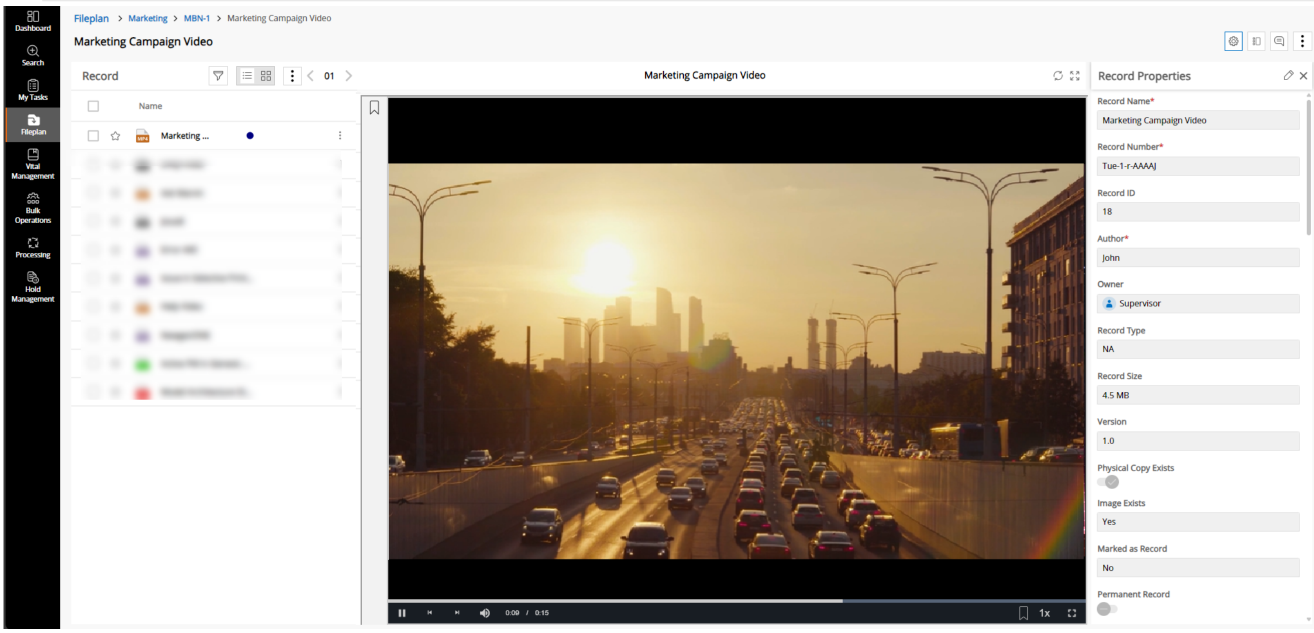
If OIVT is not installed on the server machine and you try to open a record, then the record gets invoked in its native application provided the application is installed on the client's machine. If the application is not installed, then a Download screen is invoked through which you can either download the record or open it.
The system provides the flexibility to integrate with third-party viewer applications to view Microsoft Office records like Word, Excel, PowerPoint, and so on. Use only one viewer at a time.

Media file viewer

The Media File Viewer is used to play audio and video media files uploaded in the OmniDocs RMS Records. Perform the below steps to play such files:

1. Click the required media file. The file opens in the media file viewer.

   Only MP3, MP4 (and its family of file formats), FLV, MOV, WEBM, OPUS, and 3GP (and its family of file formats) can be uploaded and viewed using the media file viewer.



   The left pane displays the records available in the folder.

2. Click the **Play** button to play the media file. The features on this screen are the same as that of the OpAll Viewer. Refer to the:
   - Properties
   - Thumbnail
   - Notes

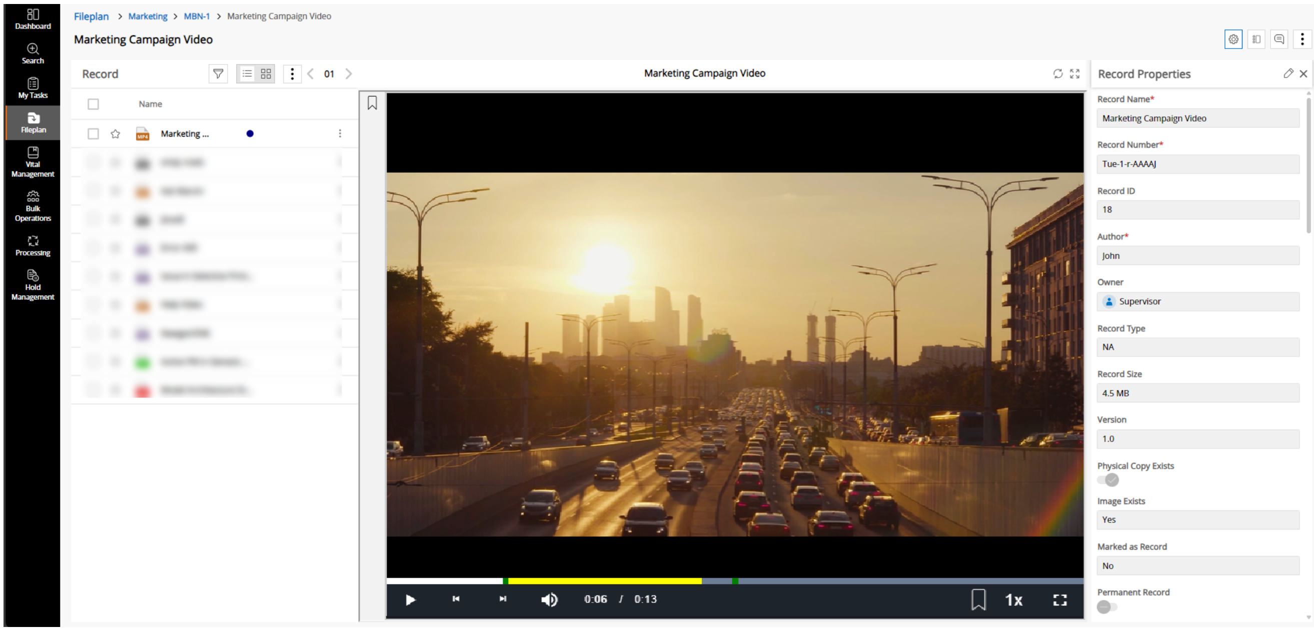
To learn more about toolbar icons and their uses, refer to the Record toolbar, described in the OpAll Viewer operations section.

Trimming video

The Video Trim feature allows you to trim videos by selecting specific start and end points, making it simple to remove unnecessary parts.

To trim a video, perform the following steps:

1. When the video is playing, double-click the timeline at the point where you want to start trimming.
2. Drag the trim pointer to the desired endpoint. The selected trimming part is highlighted in yellow.



3. Right-click the yellow highlighted section. The following options appear:
   - **Trim Video** — Trim the video to the selected timespan.
   - **Clear Trim Points** — Remove the selected trimming section.
4. Select the **Trim Video** option to proceed with trimming. The trimmed video appears on the left pane as a new file.

Bookmarking video

Video bookmark allows you to create bookmarks on videos for easy navigation, helping you quickly access important segments.

To create a bookmark, perform the following steps:

1. In the video player options, click the add video bookmark icon located at the bottom.
   A dialog appears with the following options:
   - **Bookmark Name** — Enter the bookmark name.
   - **Bookmark Time** — Click anywhere on the timeline where you want to add the bookmark.

A red line appears on the timeline, indicating the bookmark. Repeat the process to create multiple bookmarks as needed.

To view and manage bookmarks, perform the following steps:

1. A bookmark icon appears on the upper left side of the video player. Click this icon to view the list of bookmarks.
2. From the bookmark list, click a bookmark to navigate directly to that point in the video.

In the bookmark list, each bookmark is accompanied by the following options:

- **Edit Icon** — Click to edit the bookmark name. After making changes, click **Update List** to save the changes.
- **Delete Icon** — Click to delete the bookmark from the list.

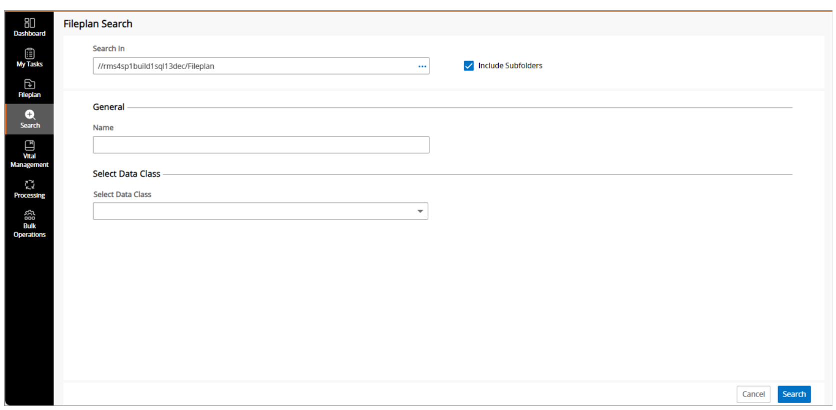
Search

The Search functionality allows you to search classes, files, fileparts, records, and paper profiles existing in the fileplan repository.

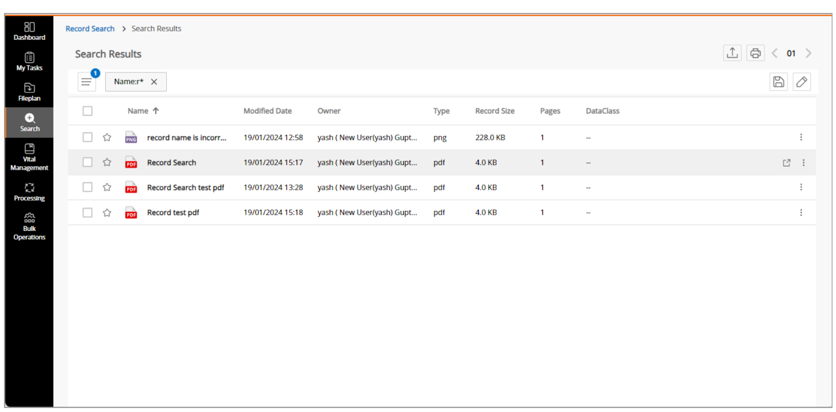
To search classes, files, fileparts, records, or paper profiles, perform the below steps:

1. Click the **Search** tab on the navigation panel. The following tabs appear:
   - **My Searches** – It contains the list of search results saved by you.
   - **System Defined** – It contains the list of searches that are configured by the administrator.

   To find a specific search type, enter the search name in the Search box.
2. Go to the **System Defined** tab and select a required search type. The search screen appears.



3. Specify the required search criteria and click **Search**. The search results appear.



4. Click the Export icon, located at the top right corner. The result gets saved in XLS format.

The following operations can be performed in the search results tab:

To Print details, follow the below steps:

1. Click the **Print** icon, located at the top right corner near icon. The print screen appears.
2. Click on the **Print** button.

To Save the search, follow the below steps:

1. Click the **Save** icon, located at the top right corner below icon. and a pop screen appears.
2. Enter the name you want to save search for.
3. Specify the input fields and output settings, by default Input Field appears on the pop-up.
4. Click on the **Save** button to save the search.

To edit the search, follow the below steps:

1. Click the **Edit** icon, located at the top right corner below icon. It navigates you to the search screen.
2. Edit the search details, then click the **Search** button.
3. Updated results as per new search details appear.

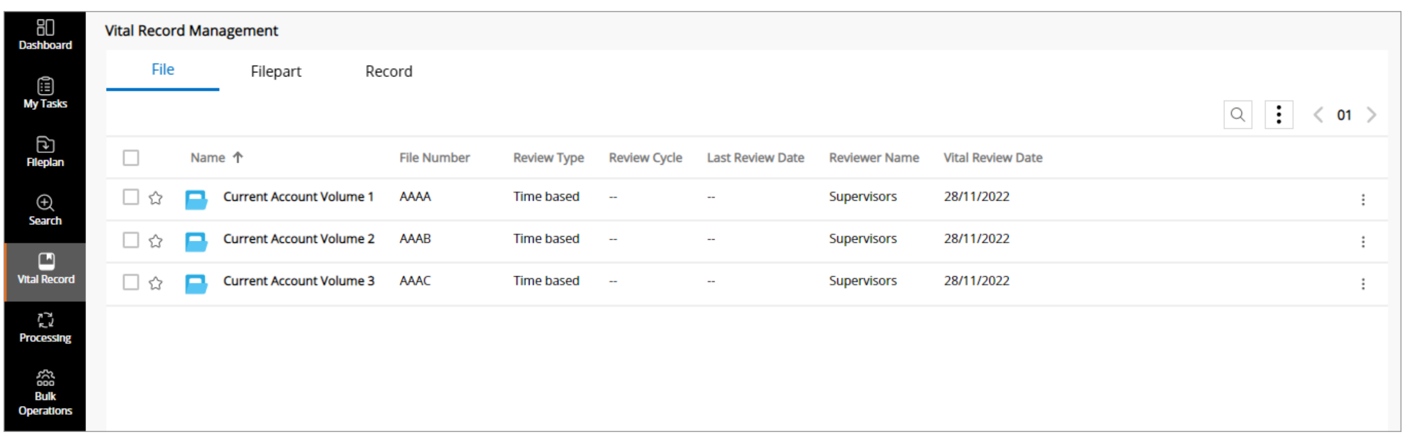
Vital Record

This chapter describes how the Record Management System deals with vital records. Vital records are files, fileparts, and records that are essential to businesses. Files, fileparts, and records can be defined as vital in RMS for a specified duration of time. Disposition and retention rules cannot be applied to files, fileparts, and records marked as vital.

RMS provides an easy way to manage and review vital records. Using this tool, you can view all the files, fileparts, and records for a specified vital review date.

You can view the properties of the files, fileparts, and records and can also perform operations like request, check-in or checkout, and so on.

To access vital records, click the **Vital Record** tab given on the navigation panel. The Vital Management screen appears containing a list of all the vital records in the File, Filepart, and Record tab that are submitted for review.



Working on file

You can perform the following operations on a vital file:

- Add Filepart
- Add Record
- Add Paper Profile
- Properties
- Audit Log
- Custom operations
- Manage Rights
- Set Alarms/Reminders
- Hold or Release
- Move
- Close or Reopen
- Links
- Review
- Update Reviewer
- Remove vital property

Reviewing file

The Review operation of the vital files allows you to review the files that are assigned to you.

To review a file, perform the below steps:

1. On the Vital Record Management screen, click **File**. The File tab opens. By default, the File tab appears on the Vital Record Management screen.
2. Click the **Actions** ⋮ icon against a specific file and select **Review**. The message "File(s) Reviewed Successfully" appears.

To review multiple files, perform the below steps:

1. Select the checkboxes against the specific files. On selecting multiple checkboxes the multiple actions buttons appear.
2. Click the **Actions** ⋮ icon that appears at the top-right corner of the screen and select **Review**. The message "File(s) Reviewed Successfully" appears.

Updating reviewer of file

The Update Reviewer operation of the vital files allows you to change the reviewer's name of the files that are assigned to you.

To update a reviewer for a file, perform the below steps:

1. On the Vital Record Management screen, click **File**. The File tab opens. By default, the File tab appears on the Vital Record Management screen.
2. Click the **Actions** ⋮ icon against a specific file and select **Update Reviewer**. The Update Reviewer dialog appears.
3. Select a required group or role name to whom you want to share the file for review.
4. Click **Save**. The message "Reviewer Updated Successfully" appears. The file gets removed from your list of vital files and is visible to the selected viewer only.

To update multiple reviewers, perform the below steps:

1. Select the checkboxes against the specific files. On selecting multiple checkboxes the multiple actions buttons appear.
2. Click the **Actions** ⋮ icon that appears at the top-right corner of the screen and select **Update Reviewer**. The Update Reviewer dialog appears.
3. Select a required group or role name to whom you want to share the file for review.
4. Click **Save**. The message "Reviewer Updated Successfully" appears. The files get removed from your list of vital files and are visible to the selected viewer only.

Removing vital property of file

The Remove Vital Property operation of the vital files allows you to remove the files from the vital list that are assigned to you.

To remove the vital property of a file, perform the below steps:

1. On the Vital Record Management screen, click **File**. The File tab opens. By default, the File tab appears on the Vital Record Management screen.
2. Click the **Actions** ⋮ icon against a specific file and select **Remove Vital Property**. The Remove Vital Property dialog appears.
3. Click **Confirm**. The message "Vital record removed successfully" appears. The file gets removed from your list of vital files.

To remove multiple vital properties, perform the below steps:

1. Select the checkboxes against the specific files. On selecting multiple checkboxes the multiple actions buttons appear.
2. Click the **Actions** ⋮ icon that appears at the top-right corner of the screen and select **Remove Vital Property**. The Remove Vital Property dialog appears.
3. Click **Confirm**. The message "Vital record removed successfully" appears. The files get removed from your list of vital files.

Working on filepart

You can perform the following operations on vital filepart:

- Add Record
- View and Modify Properties
- Vital Audit Log
- Sharing
- Set Alarms or Reminders
- Delete
- Move
- Close or Reopen
- Hold or Release
- Links
- Review
- Update Reviewer
- Remove Vital Property
- Custom Operations

Reviewing filepart

To review a filepart, on the Vital Record Management screen, go to the **Filepart** tab and refer to the Reviewing file section for procedural details.

Updating reviewer of filepart

To update the reviewer of a filepart, on the Vital Record Management screen, go to the **Filepart** tab and refer to the Updating reviewer of file section for procedural details.

Removing vital property of filepart

To remove the vital property of a filepart, on the Vital Record Management screen, go to the **Filepart** tab and refer to the Removing vital property of file section for procedural details.

Working on record

You can perform the following operations on a vital record:

- View and Modify Properties
- Create References
- View Audit Log
- Sharing
- Set Alarms or Reminders
- Delete
- Move
- Hold
- Release
- Request
- Links
- Download
- Make Record
- Checkout or Checkin
- Versions
- Forward
- Renditions
- Setup Supersede Relationship
- Print
- Review
- Update Reviewer
- Remove Vital Property
- Custom Operations

Reviewing record

To review a record, on the Vital Record Management screen, go to the **Record** tab and refer to the Reviewing file section for procedural details.

Updating reviewer of record

To update the reviewer of a record, on the Vital Record Management screen, go to the **Record** tab and refer to the Updating reviewer of file section for procedural details.

Removing vital property of record

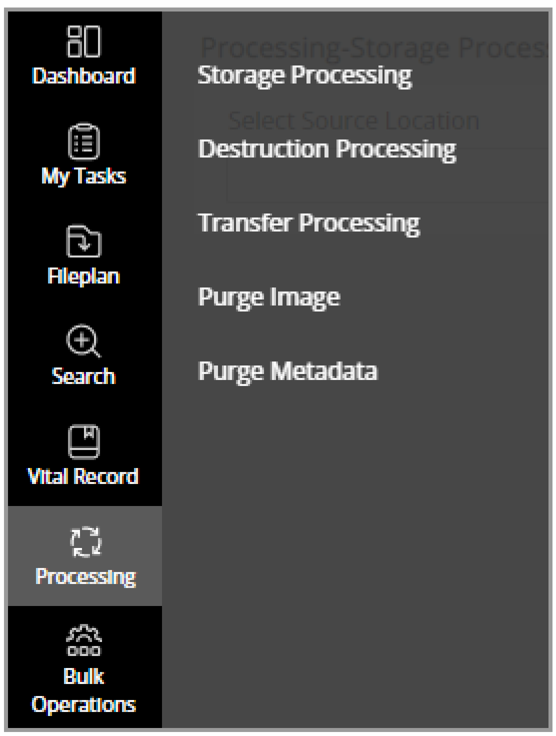
To remove the vital property of a record, on the Vital Record Management screen, go to the **Record** tab and refer to the Removing vital property of file section for procedural details.

Processing

The Processing tab contains the following tab:

- Storage Processing
- Destruction Processing
- Transfer Processing
- Purge Image
- Purge Metadata

To access the **Processing** tab, click **Processing** given on the navigation panel.



Storage processing

The Storage Processing tab contains the list of items that are ready for storage processing as defined in the Storage Rule. The administrator defines the storage rule using the RMS Admin module. It enables the movement of files, fileparts, and records from one location to another. The transfer request is sent to the administrator of the location where files, fileparts, and records are stored.

To work on storage processing, perform the below steps:

1. Go to **Processing** > **Storage Processing**. The Storage Processing screen appears.
2. Click the **Select Source Location** box. The Location dialog appears.
3. Select a required source location and click **Done**. The following tabs appear:

Tab	Description
File	Displays files in the list view ready for storage processing and belongs to the selected location.
Filepart	Displays filepart in the list view ready for storage processing and belongs to the selected location.
Record	Displays record in the list view ready for storage processing and belongs to the selected location.

Click the **Actions** ⋮ icon given at the upper-right corner of the screen to save and print the list of files, fileparts, and records that you want to transfer.

4. Select the specific checkbox of file, filepart, or record from their respective tabs. The selected file, filepart, or record gets added as a patch and is visible at the bottom of the screen. If you want to remove an added file, filepart, or record, then click the cross icon against it.
5. Click the **Select Destination Location** box. The Location dialog appears.
6. Select a required destination location and click **Done**.
7. Click **Generate Transfer Note**. The Generate Transfer Note dialog appears.
8. Specify the following details:

Fields marked with * are mandatory to fill.

Fields	Description
Recipent User	Displays the name of the recipient user. The recipient user is the administrator of the location.
Dispatch ID	ID associated with the request made.
Dispatch Date	Dispatch date of the required item.
Item Name	Name of the requested item.
Requester Name	Name of the person who has requested the item.
Courier Details	Details of the courier by which the requested item is dispatched.
Return Date	Return date of the required item.
Owner Name	Owner name of the requested item

To print the details filled in the transfer note, click the **Print** icon that appears at the top-right corner of the Generate Transfer Note screen.

9. Click **Send**. The message "Objects Dispatched Successfully" appears. On completion of dispatch, a receipt of a dispatched item appears. You can print the receipt for your reference.

Destruction processing

Destruction Processing contains the list of items that are ready for disposal.

To access Destruction Processing, go to **Processing** and click **Destruction Processing**. The Destruction Processing screen appears. It contains the following tabs:

- Items to be disposed - It contains the list of items that are ready for disposal. It comprises the following tabs:
  - File
  - Filepart
  - Record

- All Consignments - It contains the list of consignments that are ready for disposal. It comprises the following tabs:
    - Sent
    - Incoming
    - Finalized
- Retained Records - It contains the list of retained items. It comprises the following tabs:
    - File
    - Filepart
    - Record

Click the **Actions** ⋮ icon given on the upper-right to save and print the list of files, fileparts, and records that you want to dispose of.

Items to be disposed

It contains the list of files, fileparts, and records that are ready for disposal. You can perform the following actions on a disposable file, filepart, and record:

- Add to Consignment - It allows you to add multiple disposable files, fileparts, or records in a consignment to dispose of them altogether. This action is only available for files with disposition actions such as transfer, destroy, or export. Also, for disposing of multiple files, fileparts, or records simultaneously they must have the same disposition action.
- Properties - It allows you to view the properties of a disposable file, filepart, or record.
- Keep Indefinite - It allows you to keep a disposable file, filepart, or record for an indefinite time. The items with Keep Indefinitely as disposition status only appear in the items to be disposed tab. This action is only visible to those files, fileparts, and records that have keep indefinitely as the disposition action.
- Change Disposition Action - It allows you to change the disposition action of the file, filepart, and record.
- Change Disposition Due Date - It allows you to extend the disposition due date for a file and filepart even after the previous disposition due date has already passed.

To add a disposable file to a consignment, perform the below steps:

1. Go to **Destruction Processing** > **Items to be disposed** > **File**.
2. Click the **Actions** ⋮ icon against a specific file and select **Add To Consignment**. The Add To Consignment dialog appears. It lists the existing consignments that are created by you.
3. Select a required consignment and click **Confirm**. Alternatively, you can also perform the below steps to create a new consignment for adding disposable files in it:
   a. Click **+Create Consignment**.
   b. Enter a name in the **Consignment Name** box.
   c. Select an authorizer for the consignment in the **Select or Type Authorizer** box**.**
   d. Click **Create and Send** to create the consignment and add the assignment.

> To add a disposable filepart or record to a consignment, go to **Destruction Processing** > **Items to be disposed** > **Filepart** or **Record** and perform the similar steps as mentioned above.

To view the properties of a disposable file, filepart, or record, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific file, filepart, or record and select **Properties**. The Properties dialog appears.
2. Click the **Print** icon to print the properties.

To keep a file, filepart, or record for an indefinite time, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific file, filepart, or record and select **Keep Indefinite**. The Keep Indefinitely dialog appears for confirmation.
2. Click **Confirm**. The message "Item Retained Successfully" appears. Once an item is retained, it appears in the list of records in the Retained Records tab under Destruction Processing.

To change disposition action for a file, filepart, or record, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific file, filepart, or record and select **Change Disposition Action**. The Change Disposition Action dialog appears.
2. Select the disposition action.
   - If the disposition action for a file, filepart, or record is in destroy, transfer, or export then you can change it to Keep indefinitely.
   - If the disposition action for a file, filepart, or record is Keep indefinitely or Selective transfer then you can change it to **Destroy** or **Transfer**.
3. Click **Confirm** to save the changed disposition action.

To change disposition due date for a file or filepart, perform the below steps:

This action applies to time and phase-based retentions.

1. Click the **Actions** ⋮ icon against a specific file or filepart and then select **Change Disposition Due Date**. The Change Disposition Due Date dialog appears.
2. Specify the dispose after duration in years, months, or days. The new time must be later than the current date and the closed date.
3. Click **Save** to change the disposition due date.

All consignments

All Consignments tab contains the lists of sent, incoming, and finalized consignments that are ready for disposal.

To access the All Consignment tab, go to **Processing** > **Destruction Processing** > **All Consignments**. The All Consignments screen appears, it contains the following tabs:

- Sent
- Incoming
- Finalized

Sent:

The Sent tab contains the list of consignments that are sent by you for disposal. You can perform the following actions on the item in the Sent tab:

- Empty
- Audit Log

Incoming:

The Incoming tab contains the list of consignments that are assigned to you for finalizing the disposal. You can perform the following actions on the item in the Incoming tab:

- Finalize
- Empty
- Audit Log

Finalized

The Finalized tab contains the list of consignments that are finalized for disposal. You can perform the following actions on the item in the Finalized tab:

To empty the consignment, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific consignment and select **Empty**. The Empty dialog appears for confirmation.
2. Click **Confirm**. The message "Consignment(s) Dispersed Successfully" appears.

   You can also empty multiple consignments at a time by clicking the checkboxes against the specific consignments and then selecting **Empty**. The Empty dialog appears for confirmation. Click **Confirm** to continue.

To view and save an audit log, click the **Actions** ⋮ icon against a specific consignment and select **Audit Log**. The Audit Log screen appears containing the operations done by different users on the consignment. To print and save the audit log, click here for procedural details.

To finalize the consignment, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific consignment and select **Finalize**. The Finalize dialog appears for confirmation.
2. Click **Confirm**. The message "Item(s) Finalized Successfully" appears. Once the consignment is finalized, it cannot be restored.

   You can also finalize multiple consignments at a time by clicking the checkboxes against the specific consignments and then selecting **Finalize**. The Finalize dialog appears for confirmation. Click **Confirm** to finalize.

Retained items

The Retained items tab contains the items that have disposition action as **Keep Indefinite** from the list of **Items to be disposed**. These items will remain intact indefinitely until they are added to a consignment. You can perform the following actions on items in the Retained Records tab:

- Properties
- Change Disposition Action

To view the properties of a retained file, filepart, or record, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific file, filepart, or record and select **Properties**. The Properties dialog appears.
2. Click the **Print** icon to print the properties.

To change disposition action for a file, filepart, or record, perform the below steps:

1. Click the **Actions** ⋮ icon against a specific file, filepart, or record and select **Change Disposition Action**. The Change Disposition Action dialog appears.
2. Select any one option between **Destroy** or **Transfer**.
3. Click **Confirm** to save the changed disposition action.

Transfer processing

Transfer Processing contains the list of all items that are ready to get transferred to the next phase. The files, fileparts, and records are listed in the Transfer Processing tab as per the defined retention rule. Once an item is listed in the Transfer Processing tab, you receive an alert to transfer the item to the next phase. You must manually transfer the item to the next phases till the item transfers to NARA.

> To run the required commands for items displayed in the Transfer Processing, you must have administrator rights.

To access Transfer Processing, perform the below steps:

Go to **Processing** and click **Transfer Processing**. The Transfer Processing screen appears with the following tabs:

- File
- Filepart
- Record

> Click the **Actions** ⋮ icon to save the list of items in the PDF or XLS format or to print the list of items.

File

Transfer Processing of File allows you to perform the following operations:

- View Properties
- Interim Transfer

You can perform the view properties actions only in case file is marked as vital record.

To view properties, perform the below steps:

1. Click the **Actions** icon given against the file.
2. Select **Properties**. The Properties dialog appears with the following tabs:
   - General
   - Vital
   - Disposition
   - Record Policy
3. Click the **Print** icon to print the properties.

To interim transfer, perform the below steps:

1. Click the **Actions** icon against a file.
2. Select **Interim Transfer**. The Interim Transfer dialog appears.
3. Select the **Location** and **Box** from the available list. You can also search the location with its name using the search bar.
4. Click **OK** to transfer the file. The message "Transfer to Next Phase" appears. The Transferred file gets removed from the items list.

Filepart

To perform the transfer processing on filepart, refer to the file transfer processing section for procedural details.

Record

To perform the transfer processing on record, refer to the file transfer processing section for procedural details.

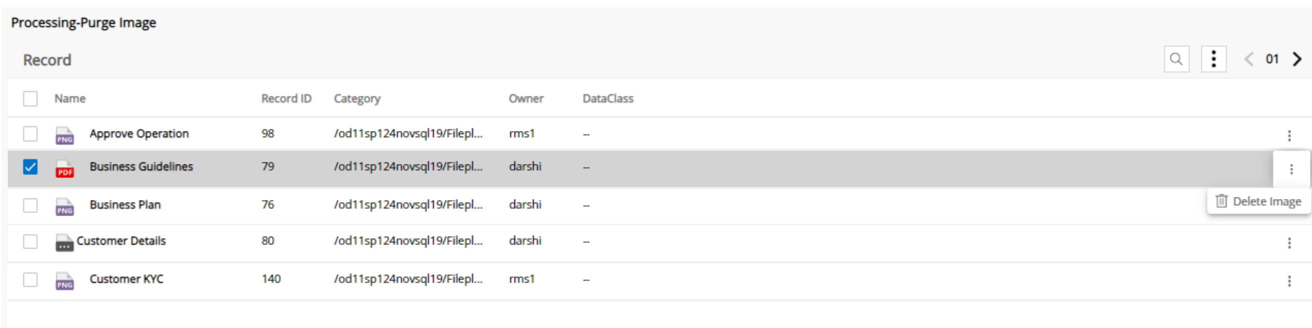
Purge image

The Purge Image tab contains the list of records to be deleted based on the retention rule applicable on a particular record.

Once you delete a record from the Purge Image tab, then the record also gets deleted from its respective file and filepart. However, you can view the metadata associated with the deleted record.

To delete a purge image, perform the below steps:

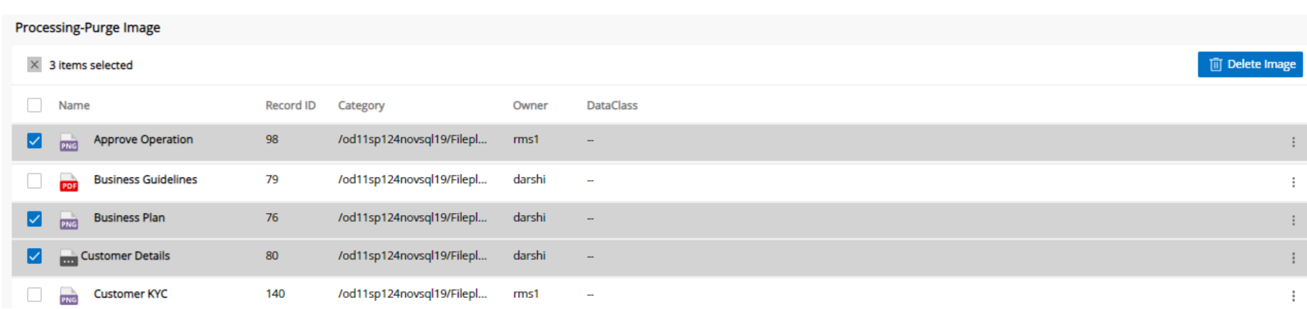
1. Go to **Processing** > **Purge Image**. The Purge Image screen appears.
2. Click the **Actions** icon against a specific item.



3. Click **Delete Image**. The message "Image(s) Deleted Successfully" appears.

To delete multiple purge images, perform the below steps:

1. Select the checkboxes against the specific items. On selecting multiple items the **Delete Image** button enables.



2. Click **Delete Image**. The message "Image(s) Deleted Successfully" appears.

Click the **Actions** icon to save the list of items in PDF or XLSX format.

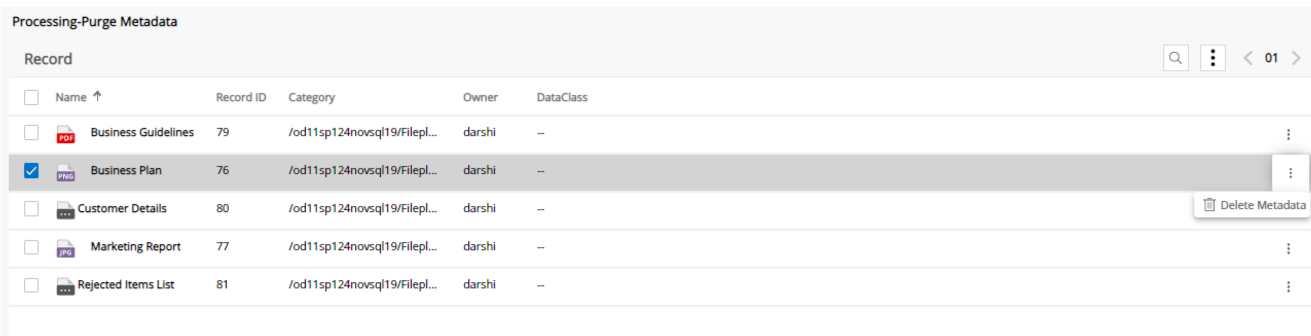
Purge metadata

The Purge Metadata tab contains the list of records along with their metadata to be deleted based on the retention rule applicable to a particular record.

Once you delete a record from the Purge Metadata tab, then the record with its metadata also gets deleted from its respective file and filepart.

To delete purge metadata, perform the below steps:

1. Go to **Processing** > **Purge Metadata**. The Purge Metadata screen appears.
2. Click the **Actions** ⋮ icon against a specific item.



3. Click **Delete Metadata**. The message "Image(s) Metadata Deleted Successfully" appears.

Click the **Actions** ⋮ icon to save the list of items in PDF or XLSX format.

Bulk Operations

The Bulk Operations feature allows you to create multiple classes and files in bulk. Using this feature, you can also export and import records, filepart, or files in bulk.

To secure the import and export operations in RMS for the record, filepart, or file, a functionality of digital signature is introduced. The signature is a secret key that is associated with the exported item. You can enable or disable the signature check while importing an exported item back to RMS.

- If the signature check is enabled, it allows you to import an item with a valid signature.
- If the signature check is disabled, it does not check the signature validation while importing an item.

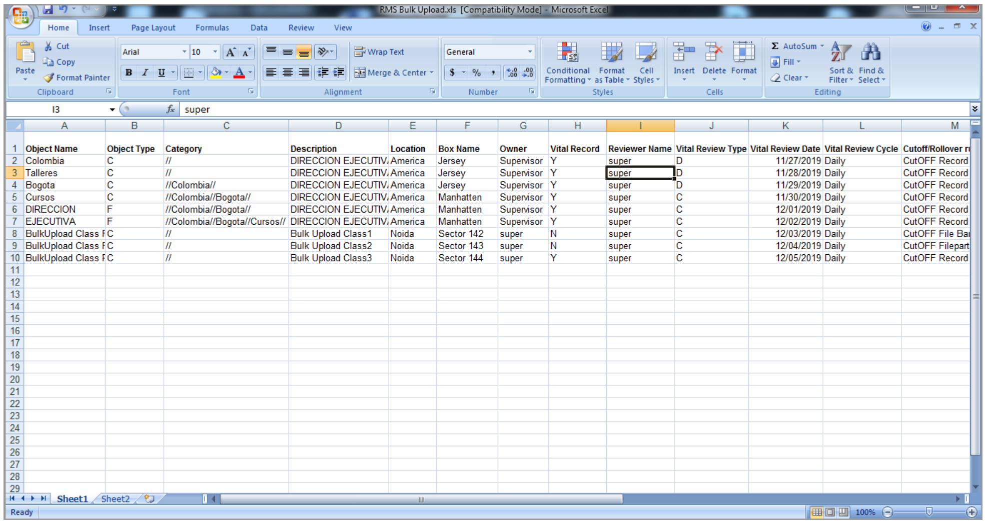
To access bulk operations, click the **Bulk Operations** tab of the menu bar. The following operations appear to perform:

- Fileplan creation
- Export
- Import

While performing the Fileplan Creation operation, only CVS or XLS files are allowed to upload. Whereas, while performing the Import or Export operation for records, only XML file format is allowed to import or export respectively.

Fileplan creation

The Fileplan Creation operation allows you to create multiple classes and files in bulk. This can be easily done using an XLS or CSV file having pre-defined fields in it.



The pre-defined fields in the XLS or CSV file for bulk upload are as follows:

Fields	Description
Object Name	Name of the class or file.
Object Type	It specifies whether the object is a class (C) or file (F).
Category	It specifies the hierarchy of the fileplan repository where you want to create a class or file. The following format is valid: //ClassName//FileName//
Description	A brief descriptions about the bulk upload for reference.
Location	The location of classes, files, and fileparts. The provided location must exist in the system. Example: Noida
Box Name	The name of the Box. The provided box location must exist in the system. Example: Sector 61
Owner	The owner name of the component being created. The one who is being made owner must be a user of the system.
Vital Record	Specify ‘Y’ if you want to make this a vital record, else ‘N’.
Reviewer Name	The name of the reviewer.
Vital Review Type	It can be either cyclic or date. Mention ‘C’ for Cyclic and ‘T’ for Date.

Fields	Description
Vital Review Date	It must be in the format of MM/DD/YYYY.
Vital Review Cycle	It can be set as daily, weekly, monthly, quarterly, half-yearly, or yearly.
Cutoff/Rollover rule	The cutoff or rollover rule name which is already defined.
Retention rule	The retention rule name which is already defined.
Storage rule	The storage rule name which is already defined.
Borrow Period	The borrow period is specified in days, months, or years. For example: specify 15D for 15 days or 5M for five months or 2Y for two years.
File Numbering Rule	The file numbering rule that is already defined.
DataClass Name	The name of the associated data class. The same data class will be applied throughout the category. Write "-" (hyphen) if you want to skip data class.
Field1	The name of the data class field 1.
Field2	The name of the data class field 2.
FieldN	The name of the data class field N.

The Owner and the signed-in user cannot be the same.

To create a file plan in bulk, perform the below steps:

1. Go to **Bulk Operations** and click **Fileplan Creation**. The Fileplan Creation screen appears.
2. (Optional) Click the **Download Sample Template** button that appears on the top right corner of the screen. The downloaded sample template contains a format with predefined fields necessary for creating a file plan. You can utilize this sample template or any other XLS or CSV file that contains the required predefined fields.
3. Click **Browse** and select the downloaded sample template or any other XLS or CSV file you have prepared for the bulk upload. You can also drag and drop a file to bulk upload.
3. Once the file is added, click **Upload** to upload the Class and File in bulk.

On successful upload of the file, the class and file whose information you have provided in the excel sheet get created. The Status and other details for the same are shown.

4. Click:
   - **Export as pdf** to save the Fileplan Creation Status in the PDF format.
   - **Export as xls** to save the Fileplan Creation Status in the XLS format.
   - **Done** to close the Fileplan Creation Status section.

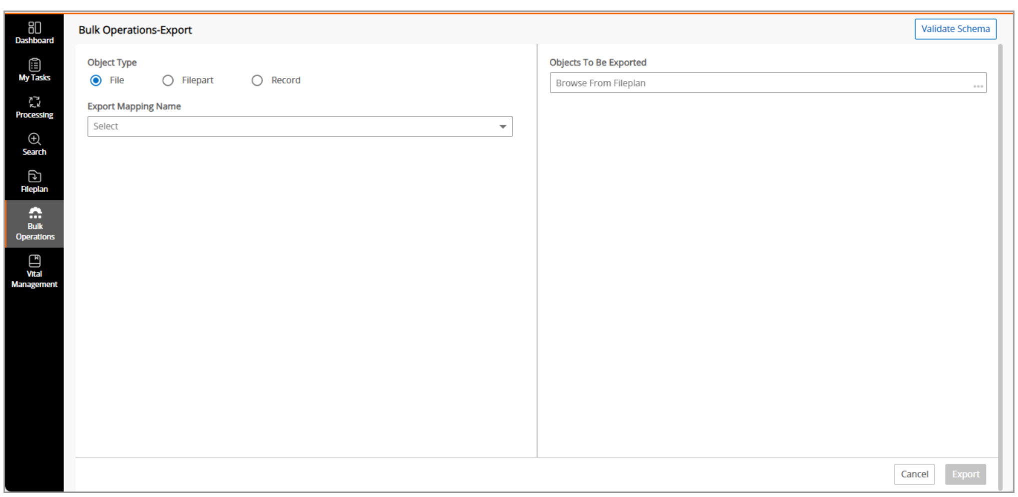
Export

The Export operation allows you to export the File, Filepart, and Record in bulk from RMS Web. The exported records open in XML format.

To export mapping configuration, perform the below steps:

1. Go to **Bulk Operations** and click **Export**. The Bulk Operation-Export screen appears.

   Refer to the Validate schema section to learn about Validate Schema link given in the top-right corner of the screen.



2. Select **File**, **Filepart**, or **Record** option appearing under **Object Type** section.
3. Select an export mapping from the list of **Export Mapping Name**.
4. Select the **Objects to be exported** as follows:
   a. Click **Browse FilePlan** and select the required objects (**File**, **Filepart**, or **Record**).

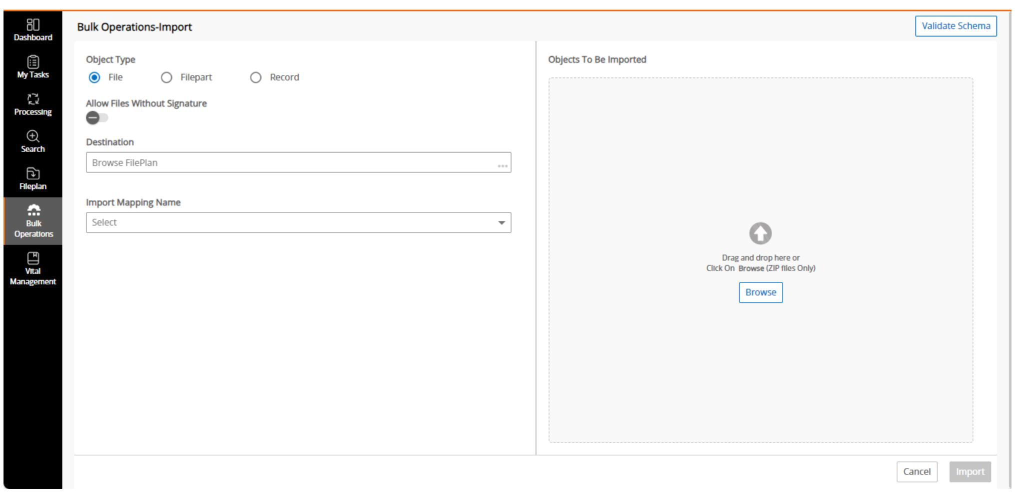
    b. Click **Add to List** to add the selected objects. Close the Fileplan dialog.
5. Click **Export** to export the selected objects. The Export dialog appears for confirmation.
6. Click **Confirm** to continue. The selected objects are downloaded as an XML file.

Import

The Import operation allows you to import the Record, Filepart, or File in bulk to RMS Web. Only the XML file format is allowed to import.

To import mapping configuration, perform the below steps:

1. Go to Bulk Operations and click Import. The Bulk Operations-Import screen appears.



2. Select **File**, **Filepart**, or **Record** option appearing under the **Object Type** section.
3. Enable or disable **Allow Files Without Signature** as required. By default, this button is disabled. It defines the following conditions:
    - Enable **Allow Files Without Signature**, if you want to import a file without a signature.
    - Disable **Allow Files Without Signature**, if you want to import a file with a signature.
4. Click **Browse FilePlan** and select a **Destination Folder**.
5. Select an import mapping from the list of **Import Mapping Name**.
6. Select **Objects to be imported** as follows:
    a. Click **Browse** and select the required XML file.

b. As you select the XML file, the **Add More** link that appears just above the added file. Click it to add more XML files.

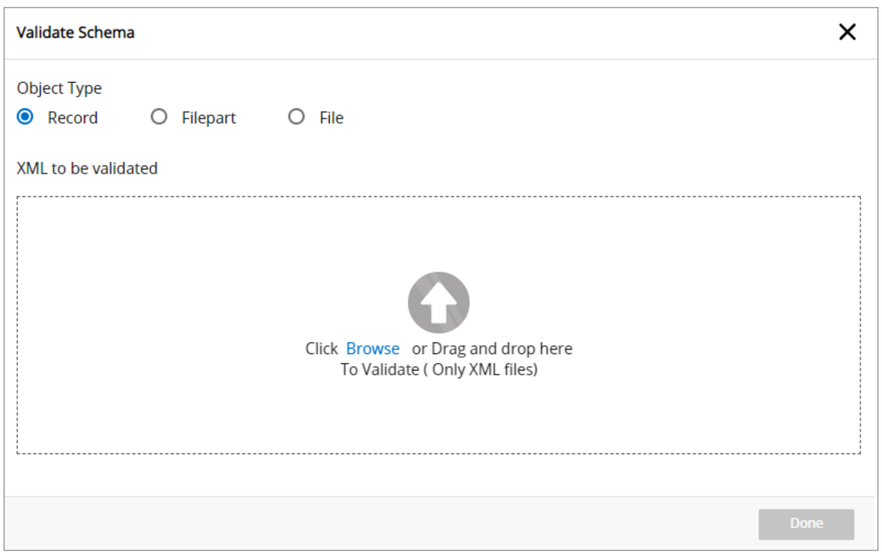
7. Click **Import** to import the selected XML files containing the objects.

Validate Schema

The Validation Schema feature allows you to validate the XML file before exporting or importing the Records, Fileparts, or Files. Validation is performed only when the relevant conditions are met by the records.

To validate schema, perform the below steps:

1. Click **Validate Schema** link given in the top-right corner of the Export or Import screen. The Validate Schema dialog appears.

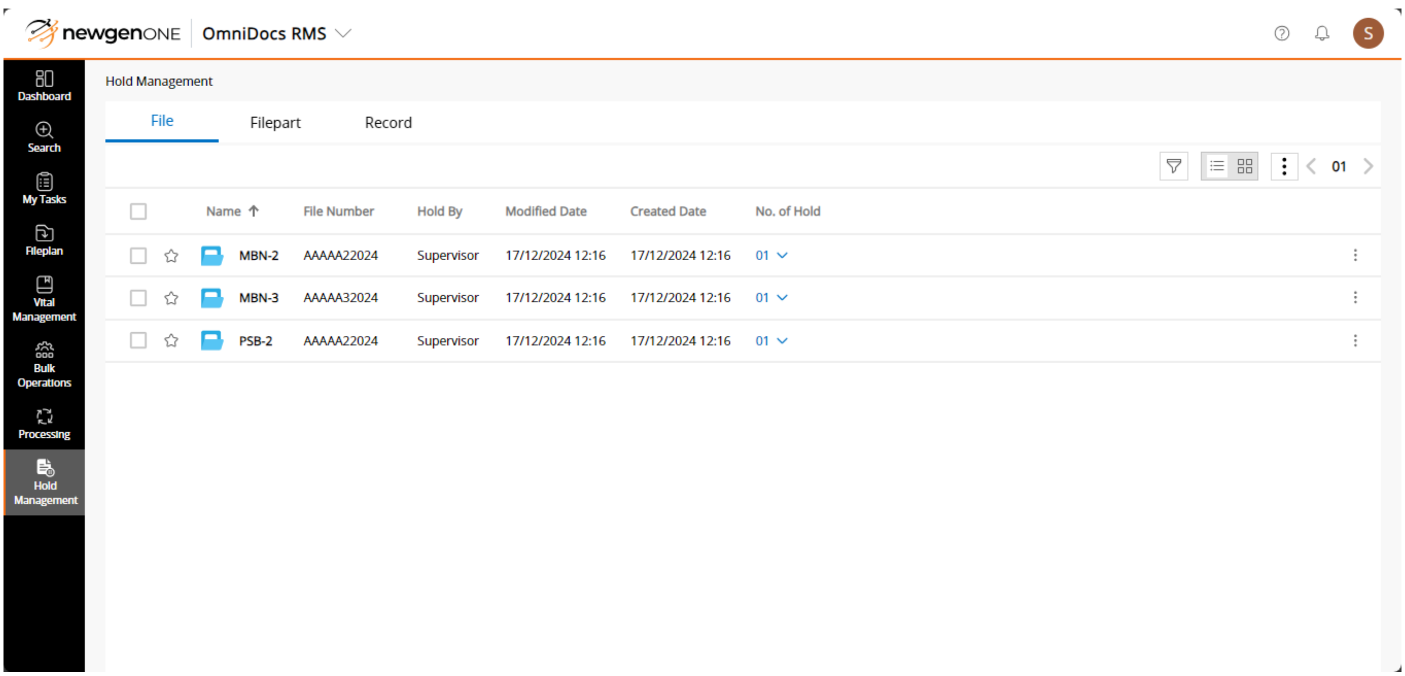


2. Select one of the following **Object Type** as required:
   - Record
   - Filepart
   - File
3. Click **Browse** and select the required XML file. The file can also be added using **Drag and Drop**.
4. Click **Done** to check the validity of the added XML file.

Hold Management

The hold management feature is designed to temporarily freeze specific records to prevent them from being altered or deleted. This feature is particularly important in scenarios like legal holds, compliance requirements, or audits, where certain records must be preserved for a set period.

To access the hold management feature, click the **Hold Management** tab given on the navigation pane. The Hold Management screen appears containing a list of all the records in the File, Filepart, and Record tabs.



Working on file

In the File tab of the Hold Management dialog, the table displays the following fields:

Field	Description
Name	Displays the name of the file.
File Number	Displays the unique identifier or file number associated with the file.
Hold By	Shows the name of the person who applies the hold on the file.
Modified Date	Shows the hold modification date.
Created Date	Shows the hold creation date.
No. of Hold	Indicates the number of different hold types applied to a particular file.

To view the details of all holds applied to a file, click the dropdown icon next to the No. of Hold value for that file. If more than ten holds are applied to a file, click **Load more on popup** to view additional holds. A dialog appears that lists all the holds applied on the file.

The following operations are available for multiple files in a Hold Management tab:

- Release
- Add another hold
- Filter

To release a file, perform the following steps:

1. Click the **Actions** icon next to a specific file.
2. Click **Release**. The Release dialog appears, listing all the holds applied to the file.

   You can only release holds you applied to the file.

3. Select the hold you want to release from the file. To release all the holds at once, select the checkbox in the header.
   You can search for a specific hold using the Search option.

4. Click **Release**. A confirmation message appears upon successful release.

To release all holds you applied on all files at once, perform the following steps:

1. In the File pane, select the checkbox in the header, and click **Release**. The Release dialog appears, listing all the holds applied to all the files.
2. Verify that all files are selected, and click **Release**. A confirmation message appears upon successful release.

To add another hold on a file, perform the following steps:

1. Click the **Actions** ⋮ icon next to a specific file.
2. Click **Add Another Hold**. The Add Another Hold dialog appears, listing all the holds applied to the file.
3. Click **+ Add Another Hold**. An extra field is added to the list of all holds.

> To delete any previously added hold, click the **Delete** icon next to a specific hold.

4. Select the hold type and provide a reason for adding the hold.
5. Click **Save**. A confirmation message appears upon successful release.

To apply a filter on the files, perform the following steps:

1. In the File pane, click the **Filter** icon. The filter dialog appears.
2. Specify the following filter criteria:

Field	Description
Name	Enter the file name.
File Number	Enter the file number.
Hold By	Select the hold owner.
Hold Reason	Enter the reason for the hold.
Hold Type	Select the hold type.

> You can enter inputs for any one field to apply the filter.

3. Click **Apply** to view the results.

Working on filepart

In the Filepart tab of the Hold Management dialog, the table displays the following fields:

Field	Description
Name	Displays the name of the filepart.
Filepart Number	Displays the unique identifier or filepart number associated with the filepart.
Hold By	Shows the name of the person who applies the hold on the filepart.
Modified Date	Shows the hold modification date.
Created Date	Shows the hold creation date.
No. of Hold	Indicates the number of different hold types applied to a particular filepart.

To view the details of all holds applied to a filepart, click the dropdown icon next to the No. of Hold value for that filepart. If more than ten holds are applied to a filepart, click **Load more on popup** to view additional holds. A dialog appears that lists all the holds applied on the filepart.

The following operations are available for multiple fileparts in a Hold Management tab:

- Release
- Add another hold
- Filter

To release a filepart, perform the following steps:

1. Click the **Actions** icon next to a specific filepart.
2. Click **Release**. The Release dialog appears, listing all the holds applied to the filepart.

> You can only release holds you applied to the filepart.

3. Select the hold you want to release from the filepart. To release all the holds at once, select the checkbox in the header.
   You can search for a specific hold using the Search option.
4. Click **Release**. A confirmation message appears upon successful release.

To release all holds you applied on all fileparts at once, perform the following steps:

1. In the Filepart pane, select the checkbox in the header, and click **Release**. The Release dialog appears, listing all the holds applied to all the fileparts.
2. Verify that all fileparts are selected, and click **Release**. A confirmation message appears upon successful release.

To add another hold on a filepart, perform the following steps:

1. Click the **Actions** ⋮ icon next to a specific filepart.
2. Click **Add Another Hold**. The Add Another Hold dialog appears, listing all the holds applied to the filepart.
3. Click **+ Add Another Hold**. An extra field is added to the list of all holds.

   To delete any previously added hold, click the **Delete** icon next to a specific hold.

4. Select the hold type and provide a reason for adding the hold.
5. Click **Save**. A confirmation message appears upon successful release.

To apply a filter on the fileparts, perform the following steps:

1. In the Filepart pane, click the **Filter** icon. The filter dialog appears.
2. Specify the following filter criteria:

Field	Description
Name	Enter the filepart name.
Filepart Number	Enter the filepart number.
Hold By	Select the hold owner.
Hold Reason	Enter the reason for the hold.
Hold Type	Select the hold type.

   You can enter inputs for any one field to apply the filter.

3. Click **Apply** to view the results.

Working on record

In the Record tab of the Hold Management dialog, the table displays the following fields:

Field	Description
Name	Displays the name of the record.
Record Number	Displays the unique identifier or record number associated with the record.
Hold By	Shows the name of the person who applies the hold on the record.
Modified Date	Shows the hold modification date.
Created Date	Shows the hold creation date.
No. of Hold	Indicates the number of different hold types applied to a particular record.

To view the details of all holds applied to a record, click the dropdown icon next to the No. of Hold value for that record. If more than ten holds are applied to a record, click **Load more on popup** to view additional holds. A dialog appears that lists all the holds applied to the record.

To view a record, click the **Open In New Tab** icon to open it in another tab.

The following operations are available for multiple records in a Hold Management tab:

- Release
- Add another hold
- Filter

To release a record, perform the following steps:

1. Click the **Actions** icon next to a specific record.
2. Click **Release**. The Release dialog appears, listing all the holds applied to the record.

   You can only release holds you applied to the record.

3. Select the hold you want to release from the record. To release all the holds at once, select the checkbox in the header.
   You can search for a specific hold using the Search option.
4. Click **Release**. A confirmation message appears upon successful release.

To release all holds you applied on all records at once, perform the following steps:

1. In the Record pane, select the checkbox in the header, and click **Release**. The Release dialog appears, listing all the holds applied to all the records.
2. Verify that all records are selected, and click **Release**. A confirmation message appears upon successful release.

To add another hold on a record, perform the following steps:

1. Click the **Actions** ⋮ icon next to a specific record.
2. Click **Add Another Hold**. The Add Another Hold dialog appears, listing all the holds applied to the record.
3. Click **+ Add Another Hold**. An extra field is added to the list of all holds.

> To delete any previously added hold, click the **Delete** icon next to a specific hold.

4. Select the hold type and provide a reason for adding the hold.
5. Click **Save**. A confirmation message appears upon successful release.

To apply a filter on the records, perform the following steps:

1. In the Record pane, click the **Filter** icon. The filter dialog appears.
2. Specify the following filter criteria:

Field	Description
Name	Enter the record name.
Record Number	Enter the record number.
Hold By	Select the hold owner.
Hold Reason	Enter the reason for the hold.
Hold Type	Select the hold type.

> You can enter inputs for any one field to apply the filter.

3. Click **Apply** to view the results.

Notifications

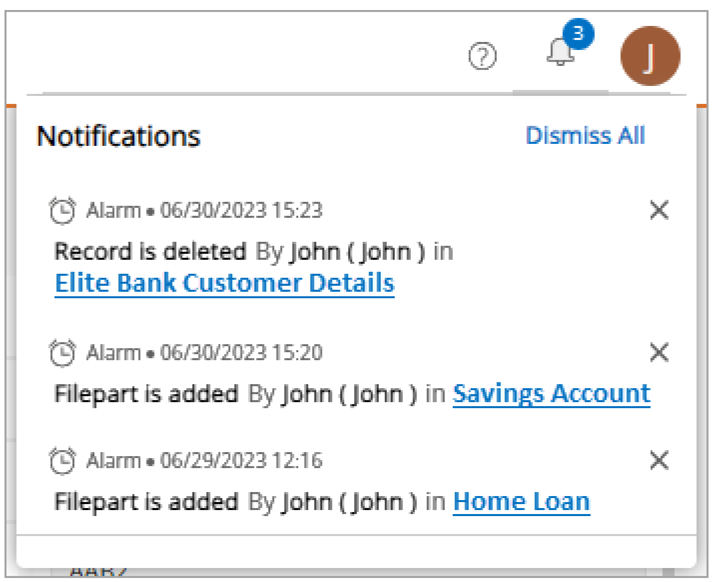
The Notification appear as a bell icon on the upper-right panel of the RMS Web screen and acts as a link for alarms and reminders. It displays a list of alarms and reminders generated for you.

The alarm notification triggers to the specified users on occurrence of certain events. Whereas, the reminder notification triggers to the specified users to notify the pending item with you.

When there is any notification with respect to an alarm or reminder, the Notifications icon appears, where the number denotes the total number of active notifications.

To view and manage notifications and navigate to the artifacts associated with certain events, perform the below steps:

1. Click the Notifications icon. The Notifications dialog appears. It displays the list of all active reminders and alarms that are triggered for you.



2. Click the link provided in the corresponding notification to access the artifact where the event occurred.

3. Click the Dismiss ✕ icon to remove a notification. The notification gets removed from the list and the notifications count gets decreased. You can also remove multiple notifications at once by clicking **Dismiss All**.

Generating Q/A with NewgenONE Marvin

NewgenONE Marvin is a Generative Artificial Intelligence (GenAI) tool used for generating questions and answers based on the selected records within a repository, search configuration, and easy search. In simpler terms, NewgenONE Marvin allows you to generate a large set of questions and answers based on the data provided, saving significant effort and time compared to manual search on specific content or metadata.

> To use NewgenONE Marvin functionality in the OmniDocs RMS, register and configure its engine settings in NewgenONE OmniDocs Admin.
> For more information, refer to the *NewgenONE OmniDocs RMS 5.0 Administration Guide*.

Consider a scenario where the Records Manager at a large legal firm, responsible for ensuring compliance with legal and regulatory requirements, oversees the management of thousands of legal records, including client files and contracts. Efficient retrieval and accurate classification are critical, especially during audits or legal proceedings. However, managing this volume manually is time-consuming and error-prone. To streamline this work, the Records Manager helps find relevant answers to customer queries in different documents, thereby significantly reducing the response time. Additionally, NewgenONE Marvin generates a summary of records quickly, enabling CSRs to address complex customer queries effectively.

The other benefits of using NewgenONE Marvin include:

- **Assistance in decision-making** — Generating questions and answers provides valuable insights and details about the content of records, helping organizations make informed business decisions.
- **Risk mitigation** — Audit teams can use the NewgenONE Marvin feature to generate questions and answers from the records, identify the key areas and potential risks, and gather valid evidence.

- **Data analysis** — Generating questions and answers helps to identify the trends and patterns in the records. It also helps in extracting deep insights about the records.

For faster responses, use the content extracted from Text Extraction Manager (TEM) and then send it to NewgenONE Marvin.

The NewgenONE Marvin feature in OmniDocs RMS allows you to perform the following tasks:

- Generating questions using NewgenONE Marvin
- Generating answers using NewgenONE Marvin
- Generating summary using NewgenONE Marvin

The NewgenONE Marvin functionality applies to a list of records present in Fileplan, Search, Vital record management, or using EasySearch.
For information on how to use the NewgenONE Marvin feature with EasySearch, refer to the *NewgenONE OmniDocs EasySearch User Guide*.

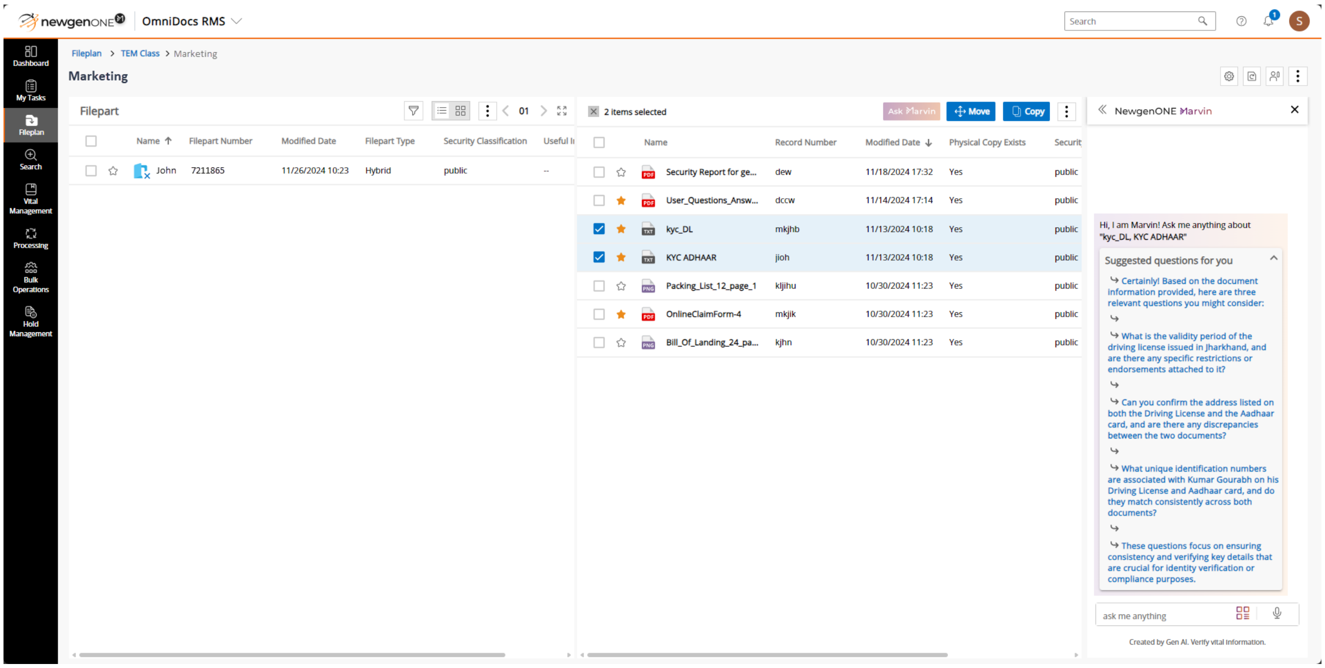
The Ask Marvin button is only visible for files and records where the NewgenONE Marvin functionality is enabled, based on the security rights assigned to you.

Generating questions

NewgenONE Marvin generates responses based on the chosen files from the records list.

To generate questions using NewgenONE Marvin, follow the below steps:

1. From the Records, select the desired files. An Ask Marvin button appears at the top of the list.
2. Click **Ask Marvin**.
   A NewgenONE Marvin pane appears on the right. It takes a few seconds to analyze the data within the records and then generate the relevant questions based on the chosen records.
   On the other hand, you can use the text prompt to ask questions to NewgenONE Marvin. For more information, see Generating answers using NewgenONE Marvin.



3. (Optional) Click the arrow « icon to expand the NewgenONE Marvin pane.
4. Click the required question to view its corresponding answer.
   NewgenONE Marvin takes a few seconds to analyze the data and then generates the answer.
5. (Optional) To quickly copy the answer to your device's clipboard, click the **Copy to clipboard** icon that appears along the generated content. Furthermore, you get a list of records NewgenONE Marvin used while generating the answer. You can select the required record to view its corresponding properties. NewgenONE Marvin also generates a set of new questions that you can click on to get the required information.

Clearing chat

Clear chat deletes the conversation, making previous messages inaccessible.

1. Click the **Clear Chat** icon. The Clear Chat dialog appears.
2. Click **Clear** to confirm. The chat with NewgenONE Marvin gets cleared.

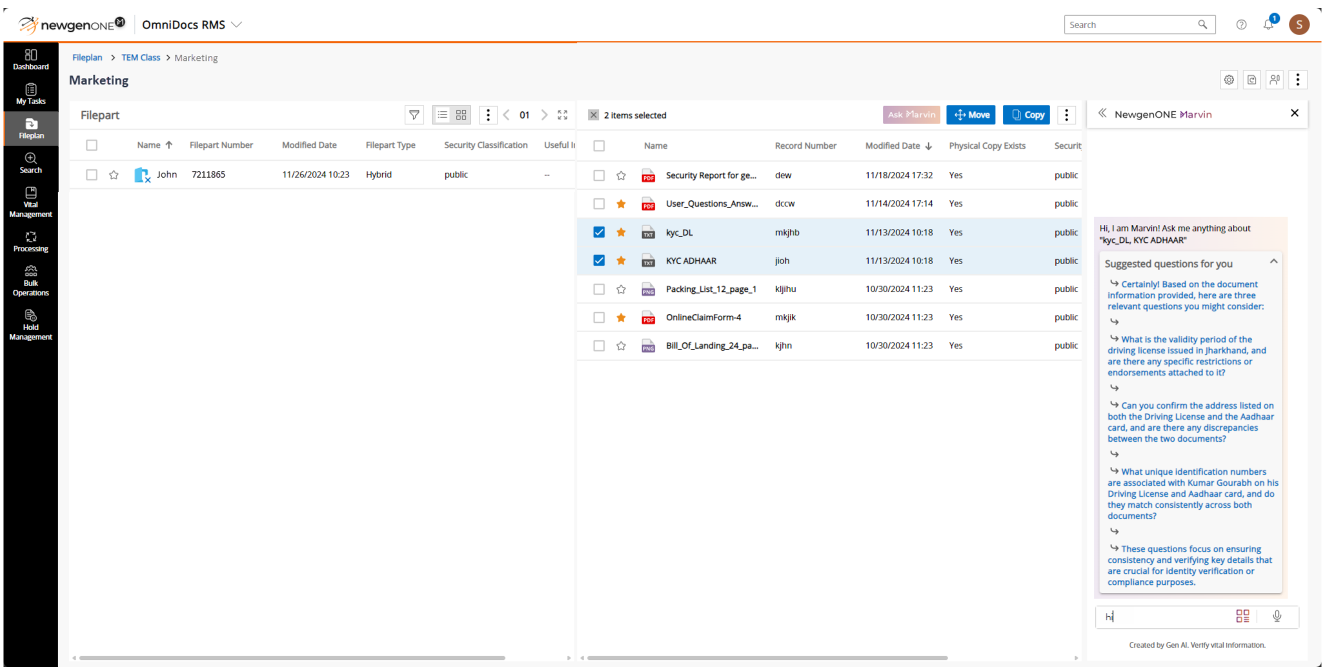
> If you clear the conversation, the previously generated conversation will no longer be used for generating a new set of questions as the history of the conversation also gets cleared.

Generating answers

NewgenONE Marvin generates responses based on the input you provided.

To generate answers using NewgenONE Marvin, follow the below steps:

1. From the Records, select the desired files. An Ask Marvin button appears at the top of the list.
2. Click **Ask Marvin**.
   A NewgenONE Marvin pane appears on the right. It takes a few seconds to analyze the data within the records and then generate the relevant questions based on the chosen records.
   On the other hand, you can use the text prompt to ask questions to NewgenONE Marvin. For more information, see Generating answers using NewgenONE Marvin.
3. (Optional) To expand the NewgenONE Marvin pane, click the arrow « icon.
4. Enter your question in the text prompt or click the microphone icon to answer your search query.
5. Click **Submit-Marvin** .



6. Click the required question to view its corresponding answer.
   NewgenONE Marvin takes a few seconds to analyze the data and then generates the answer.

7. (Optional) To quickly copy the answer to your device's clipboard, click the **Copy to clipboard** icon that appears along the generated content. Furthermore, you get a list of records NewgenONE Marvin used while generating the answer. You can select the required record to view its corresponding properties. NewgenONE Marvin also generates a set of new questions that you can click on to get the required information.

Clearing chat

Clear chat deletes the conversation, making previous messages inaccessible.

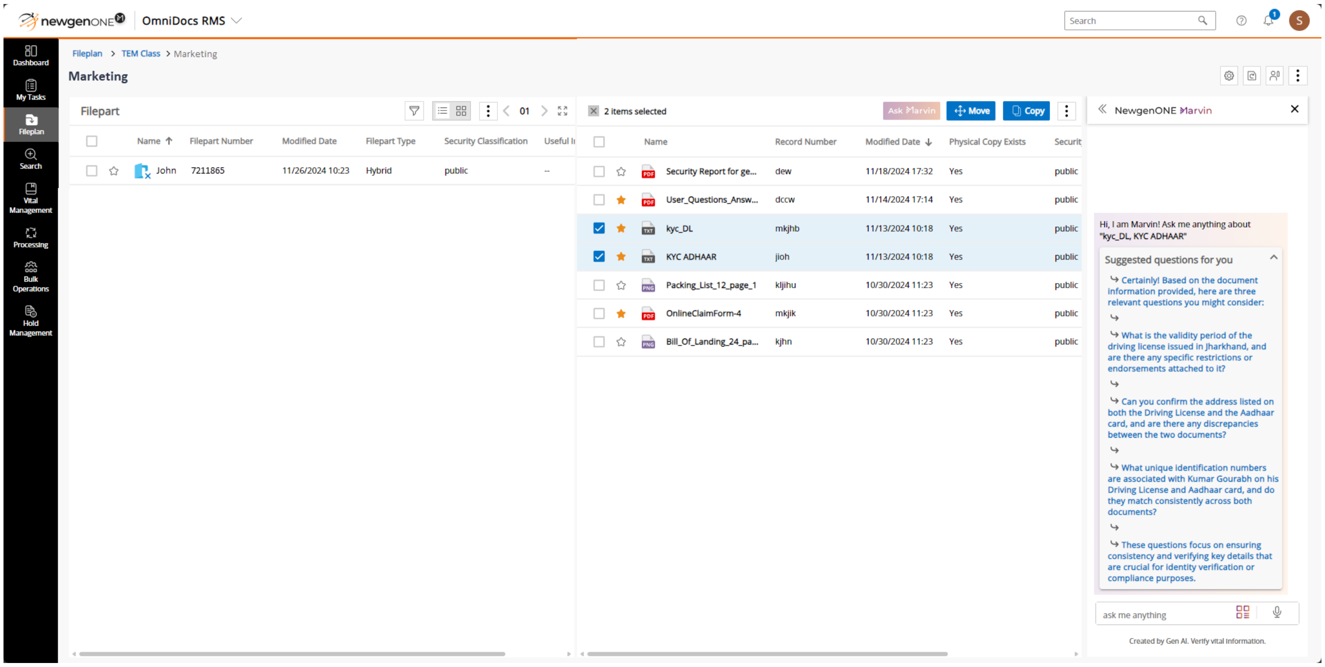
1. Click the **Clear Chat** icon. The Clear Chat dialog appears.
2. Click **Clear** to confirm. The chat with NewgenONE Marvin gets cleared.

Generating summary

NewgenONE Marvin generates summaries for the records. This summary contains the key points and important insights into the chosen records. The main purpose of generating a summary is to save time and get a quick understanding of the content of the record.

To generate a summary for the selected records, perform the below steps:

1. From the Records list, select the desired files. An Ask Marvin button appears at the top of the list.
2. Click **Ask Marvin**.
   The NewgenONE Marvin pane appears on the right. It takes a few seconds to analyze the data within the records and then generate the relevant questions based on the chosen records.
3. (Optional) To expand the NewgenONE Marvin pane, click the arrow icon.
4. Click the **Generate Summary** icon to get a quick overview of the chosen records.



NewgenONE Marvin takes a few seconds to analyze the data and then generates the record summary.

5. (Optional) To quickly copy the summary to your device's clipboard, click the **Copy to clipboard** icon that appears along the generated content.

   Furthermore, you get a list of records NewgenONE Marvin used while generating the answer. You can select the required record to view its corresponding properties. NewgenONE Marvin also generates a set of new questions that you can click on to get the required information.

6. (Optional) Click the **Clear Chat** icon to clear the conversation.

User account settings and personalization

It is possible to manage and personalize your account settings using the user icon that appears at the upper-right panel of the RMS Web screen.

To access your profile details, perform the below steps:

1. Click the user icon given in the upper-right panel. The information related to your profile appears.
2. It allows you to view and manage the following details:

Fields	Description
General Information	
Username	It displays your registered name.
Email ID	It displays your registered email ID.
Cabinet Name	It displays the signed-in cabinet name.
Last Login Time	It displays your last login date and time.
User Settings	
Profile	It allows you to view and edit your profile details. It contains your first name, last name, and email ID. For more information, refer to the Profile section.
User Preferences	It allows you to personalize your repository view. For more information, refer to the User Preferences section.
Change Password	It allows you to reset your password. For more information, refer to the Change Password section.
Notification Settings	

Fields	Description
All Reminders & Alarms	It allows you to view all reminders and alarms that are set for you. For more information, refer to the All Reminders and Alarms section.
Cabinet Reminders	It allows you to view and set cabinet reminders. For more information, refer to the Cabinet Reminders section.
Logout	It allows you to logout from the RMS Web module.

User settings

User Settings contains the following configurations:

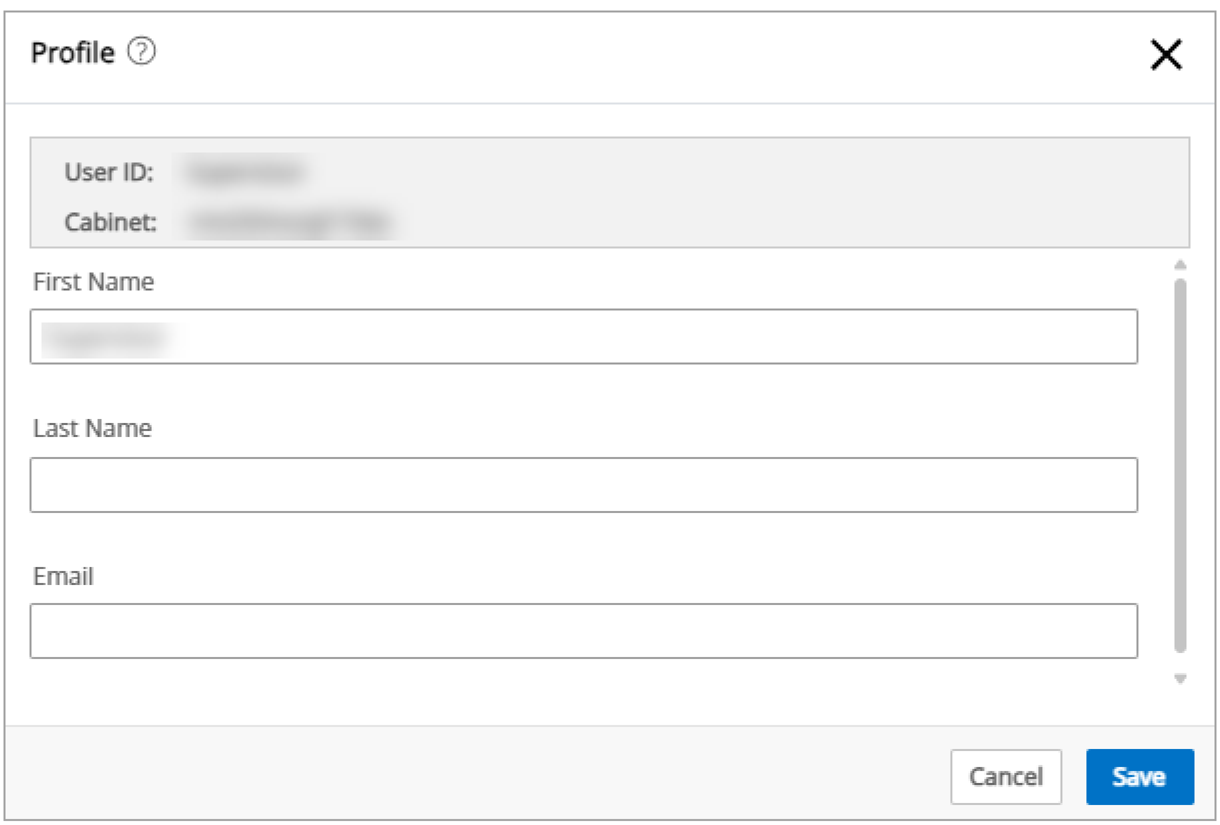
- Profile
- User Preferences
- Change Password

Profile

The Profile allows you to view and edit your profile.

To view and edit the profile, perform the below steps:

1. Click the user icon and select **Profile**. The Profile dialog appears.



2. View and specify the following details:

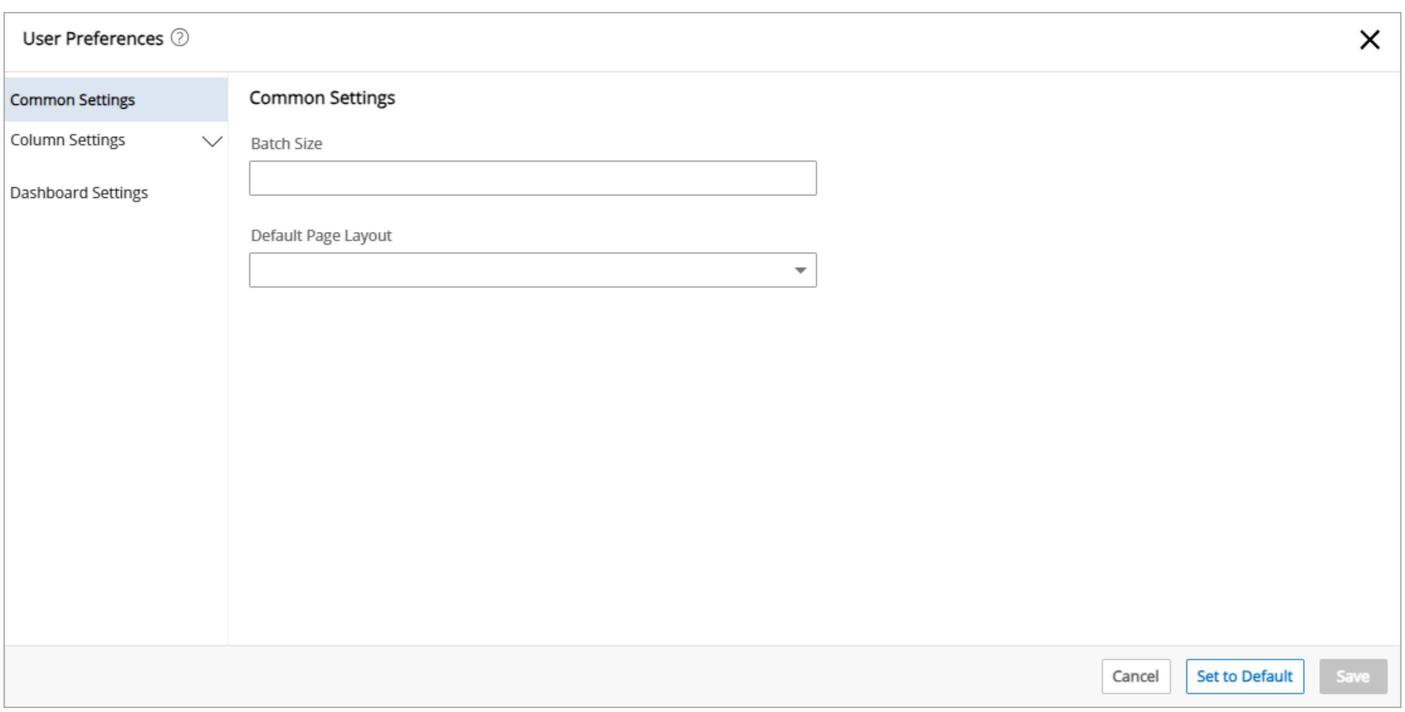
Fields	Description
User ID	Displays the user ID. It is uneditable.
Cabinet	Displays the signed-in cabinet name. It is uneditable.
First Name	Specifies the first name.
Last Name	Specifies the last name.
Email	Specifies the registered email ID.

3. Once the modifications are done, click **Save**. The message "Profile Edited Successfully" appears.

If some more fields are present under the Profile section, then it might be the U-type data. For more information on U-type data, refer to the *NewgenONE OmniDocs 12.0 Administration Guide*.

User preferences

User Preferences allow you to set the preferences for displaying fileplan items and dashboard in the RMS Web module.



To configure user preferences, click the user icon given in the upper-right panel and select **User Preferences**. The User Preferences dialog appears. It contains the following tabs:

- **Common Settings** - It allows you to set the preferences for the following fields:
    - **Batch Size** — It allows you to specify the batch size for the fileplan view. The batch size must be in the range of 5 to 50. To set the default batch size, click **Set Default**.
    - **Default Page Layout** — It allows you to change the view of the fileplan and records from list view to grid view. The default page layout view is set to list view.
- **Column Settings** — It allows you to specify the headers that appear in the fileplan view. It consists of two sections:
    - **Fileplan**: To personalize the column settings of the fileplan.
    - **Processing**: To personalize the processing action on the records folder and records. It consists of three processing types:
        - Storage
        - Transfer
        - Destruction

Specify the following details for the column settings:

Field	Description
Class	It allows you to select the following columns for class view: • Number • Owner • Created Date • Modified Date • Description The Name column is selected by default. You can rearrange the order of the selected columns list.

Field	Description
Sort On (Class Column List) and Sort Order	It allows you to sort the class column list on the basis of the following attributes: ● Name ● Number ● Create Date ● Modified Date ● Owner From the *Sort On* dropdown, select the required attribute and the preferred *Sort Order*. The class column list gets arranged in either ascending or descending order of the selected attribute.
Record Folder	It allows you to select the following columns for the record folder column list view: ● Number ● Modified Date ● Record Type ● Security Classification ● Useful Info The Name column is selected by default. You can rearrange the order of the selected columns list.
Sort On (Record Folder) and Sort Order	It allows you to sort the record folder column list on the basis of the following attributes: ● Name ● Number ● Modified Date ● Type From the *Sort On* dropdown, select the required attribute and the preferred *Sort Order*. The record folder column list gets arranged in either ascending or descending order of the selected attribute.
Record	It allows you to select the following columns for the record column list view: ● Number ● Modified Date ● Physical Copy Exists ● Security Classification ● Useful Info The Name column is selected by default. You can rearrange the order of the selected columns list.

Field	Description
Sort On (Record) and Sort Order	It allows you to sort the record column list on the basis of the following attributes: • Name • Number • Modified Date • Physical Copy Exists From the *Sort On* dropdown, select the required attribute and the preferred *Sort Order*. The record column list gets arranged in either ascending or descending order of the selected attribute.

- **Dashboard** - It allows you to set the preference for the default dashboard. To select a default dashboard, perform the below steps:
    1. Click the **Dashboard** tab from the left pane of the User Preferences dialog. The existing dashboard appears in the right pane.
    2. Select the desired dashboard and click **Save**. The message "Preferences Modified Successfully" appears.

Resetting password

Resetting password allows you to reset your current password.

To reset your password, perform the below steps:

1. Click the user icon and select **Resetting Password**. The Resetting Password dialog appears.
2. Specify the following details:

Fields	Description
Old Password	Enter your current password.
New Password	Enter a new password. Following are the limitations on resetting a password: • The maximum length of the password can be up to 32 characters. • No space is allowed in the password. • The password entered is case-sensitive.

Fields	Description
Confirm Password	Re-enter the new password.

3. Click **Change**. The message "Password Changed Successfully" appears.

Notification settings

Notification Settings contain the following configurations:

- All reminders & alarms
- Cabinet reminders

All reminders and alarms

All Alarms and Reminders contain the list of alarms and reminders that flashes on the occurrence of a certain event.

To view all the alarms and reminders, perform the below steps:

1. Click the user icon and select **All Alarms & Reminders**. The Alarms & Reminders dialog appears.
2. Go to the **Alarms** tab to view the list of all the alarms.
3. Go to the **Reminders** tab to view all the reminders.

To delete the alarms or reminders, perform the below steps:

1. Click the **Delete** icon against an alarm or reminder to dismiss the alarm or reminder. The confirmation message appears.
2. To delete multiple alarms or reminders simultaneously, select the checkboxes against the specific alarms or reminders. On multiple selections, the **Dismiss** button enables.
3. Click **Dismiss** to delete the selected alarms or reminders. The confirmation message appears.
4. Click **OK** to confirm the deletion.

Cabinet reminders

Cabinet Reminders allows you to create reminders at the cabinet level and view existing cabinet reminders.

To set and view reminders at the cabinet level, click the user icon and select **Cabinet Reminders**. Set Reminders dialog appears. It contains the following tabs:

- Send Reminders - It allows you to create and send reminders for the specific user. To work on reminders, perform the below steps:
    - Click the **Send Reminder** tab.
    - Specify the following fields:

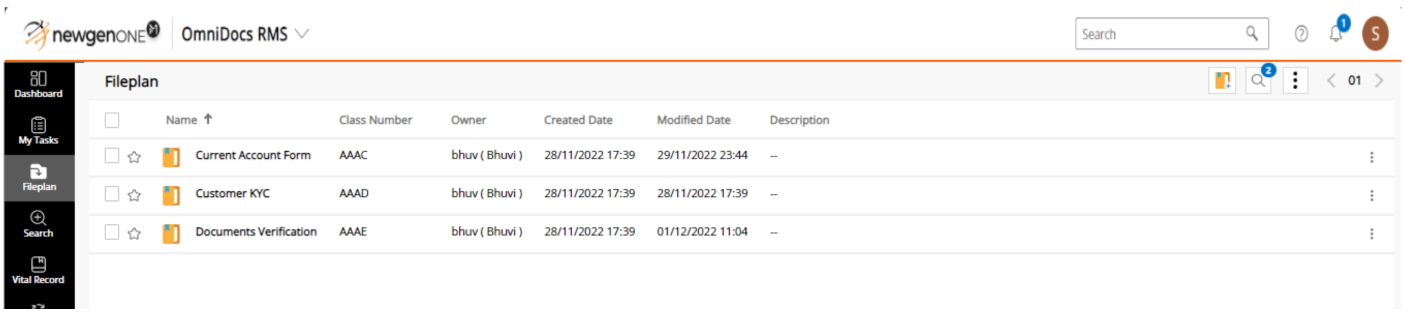
Fields	Description
Notify To	By using this option, select Myself, Groups, or Users to whom you want to notify about the reminder.
Send Notification	It allows you to send notifications at the set time. Select immediately or select the date in the format of the server where OmniDocs and RMS are installed along with time in the format of (hh:mm:ss) to send notification.
Message	Enter the message upto 255 characters that you want to share with the user.

    - Click **Set**. The message "Reminder(s) Added Successfully" appears.
- Reminder List - It allows you to view and delete existing reminders. To view and delete the cabinet reminders, perform the below steps:
    - Go to the **Reminder List** tab.
    - Click the **Delete** icon against a specific reminder or select the checkboxes against specific reminders and click **Dismiss**. The confirmation message appears.
    - Click **OK** to confirm the deletion.

Easy search

Easy Search feature allows you to search classes, files, fileparts, and records simultaneously. It offers a simplified search with filters and sorting.

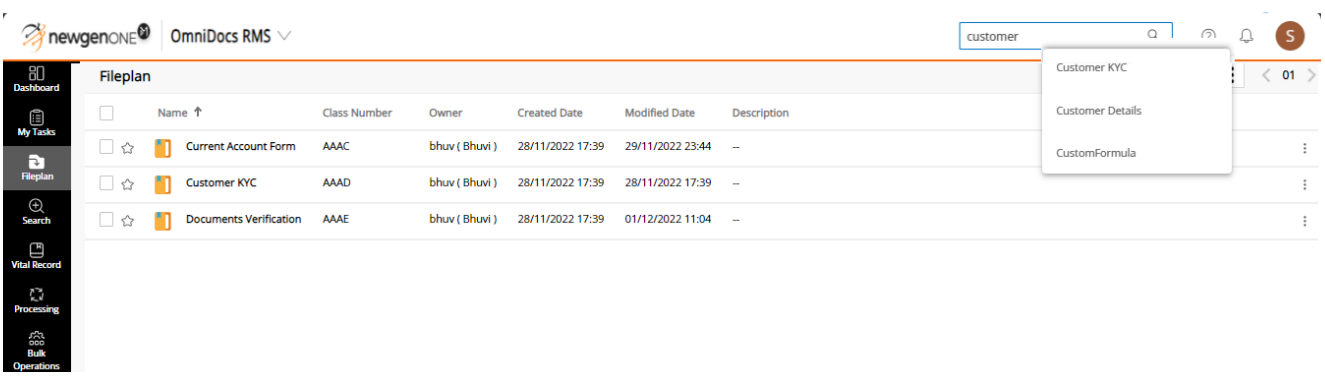
To perform the Easy Search operation, use the Search box displayed on the upper-right corner of the RMS Web screen.



To perform the search operation using Easy Search, perform the below steps:

1. Click the **Search** box displayed on the upper-left corner of the NewgenONE OmniDocs RMS screen.
2. Enter the required name of the class, file, filepart, or record.

- Once you type the search keywords, the dropdown list with the suggestive words. If you continue typing, the mismatched results keep on disappearing. In the end, only the matched words remain in the dropdown list.
- It is also possible to search the record using the publication or creation date in the **YYYY-MM-DD** format.



3. After entering the keyword, click the **Search Easy** icon or press **Enter**. The Easy Search Results screen appears displaying the searched result. It contains all the classes, files, fileparts, and records matching the specified name.

- The actual search results might vary from facet count depending on your access rights.
- You can change the view of the classes by clicking the List View or Grid View icon as needed.

The Easy Search Result screen is divided into the following panes:

- **Right-pane** — This pane contains the list of searched results.
- **Left-pane** — This pane contains the list of filters to further sort the searched results.

Searched results

Once you search for an item using the Easy Search functionality, it displays the list of entire items relevant to the searched item. You can apply filters to refine the result set.

The Easy Search Results screen contains the following tabs:

- All — It contains a list of all items relevant to the searched item. By default, the All tab is open.
- Class — It contains the list of classes relevant to the searched item.
- File — It contains the list of files relevant to the searched item.
- Filepart — It contains the list of fileparts relevant to the searched item.
- Record — It contains the list of records relevant to the searched item.

To perform the required operation on a searched item, click the **Actions** icon and select a required operation. For procedural details, refer to the respective sub-sections of the Fileplan section.