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1.0 DART EDM - LOGIN

1.1 DART EDM - HOW TO GET STARTED.

1.1.1 GETTING STARTED DESCRIPTION

Dart EDM is classified as a Microsoft™ Web Application. What this means, is that you do not need to be at any specific Desktop computer to start using Dart EDM™.

Providing any Desktop computer in your organisation has the standard Microsoft™ Internet Explorer software installed, which is linked to an active network, you can invoke Dart EDM.

Follow the instructions in the “Getting Started Procedure” to start using Dart EDM™.

A quicker way to start using Dart EDM is to install a Desktop Shortcut onto the Desktop computer. Once installed, you simple double click the icon on your desktop which will start Dart EDM.

PLEASE NOTE: See Appendix A “How to create a new Desktop Shortcut” for more information.

2.0 SYSTEM CONFIGURATION SETTINGS.

2.1 SYSTEM CONFIGURATION SETTINGS DESCRIPTION.

These setting will remain in effect for the log-in credentials.

2.2 SET WEBSITE THEMES.

2.2.1 WEBSITE THEME DESCRIPTION.

This setting will default the colour scheme applied to Dart EDM. You have the alternative of selecting one of the following colour themes:-

- Blue
- Plum
- Red
- Green

When an individual Dart EDM User logs in, they can change their own setting which will permanently stay in effect.

2.2.2 WEBSITE THEME FIELD DESCRIPTION.



Figure 1 : Website Theme Parameter.

❖Select theme:-

- | | | |
|-------------|---|--|
| Description | : | Select your option from the drop down list provided. |
| Type | : | Drop Down Selection Box. |

2.3 SET HOME PAGE.

2.3.1 HOME PAGE DESCRIPTION.

By default, Dart EDM will set this parameter to “Home Page”.

This is useful if users within the Dart EDM perform different roles within the organisation. For example, if the user is the local Dart EDM Administrator, setting this parameter to **System Configuration** would cause the **System Configuration** screen to display when they first Log On.

Each Dart EDM users can be assigned to a different **Home Page**.

2.3.2 HOME PAGE FIELD DEFINITION.



Figure 2 : Set Home Page Parameter.

❖Home Page:-

- | | | |
|-------------|---|--|
| Description | : | Use the dropdown list to select the option best suited to the user's role within the organisation. |
| Type | : | Select List Box. |

2.4 SET DOCUMENT INDEX FOR QUICK SEARCH.

2.4.1 SET DOCUMENT INDEX FOR QUICK SEARCH DESCRIPTION.

When the Dart EDM user is using Quick Search, they have the choice of using “No Index” or “Specific Index”.

To speed up the process, you can set the default parameter to a frequently used “Document Index”; however the user still has the option to change the default if required.

2.4.2 DOCUMENT INDEX FOR QUICK SEARCH FIELD DEFINITION.



Figure 3 : Document Index for Quick Search Parameter.

❖Document Index:-

- | | | |
|-------------|---|---|
| Description | : | Use the drop down list to select the best “Document Index” for the Dart EDM User. |
| Type | : | Drop Down Box. |

2.5 VERSION RESTORE NOTE ENABLE.

2.5.1 VERSION RESTORE NOTE ENABLE DESCRIPTION.

Within Dart EDM, the users have the facility to **Check OUT** and **Check IN** documents (see Dart EDM Users Guide for more information). If required, users can also restore an older version of a document that has been previously **Check OUT** / **Check IN**.

When a document has been restored to a previous version, and this parameter is enabled, Dart EDM will append a note to the document which can be viewed within Document Notes.

If however, this parameter is disabled, then no note is appended.

This parameter could be used for Auditing of “Version Documents”.

2.5.2 VERSION RESTORE NOTE ENABLE FIELD DEFINITION.



Figure 4 : Version Restore Note Enable Parameter.

❖Enable:-

Description	:	Version Notes will be made visible to the Dart EDM User.
Type	:	Display Only

2.6 SET-UP DOCUMENT STORE.

2.6.1 SET-UP DOCUMENT STORE DESCRIPTION.

The Directory name contained within this parameter, instructs Dart EDM where the central repository for all **Document** images reside.

This parameter can contain the **Directory** location in any of the following formats:-

- Physical Address e.g. C:\<sub-directories>\
- UNC Address e.g. \\<server>\<sub-directories>

Mapped drives are also acceptable.

This parameter is configured during initial installation, with the guidance of the local Dart EDM administrator, and should only change in the following situations:-

There is not enough disk storage at the current location, and a new location has been earmarked.

The organisation has changed their storage structure e.g. NAS, Virtualisation.

If you are considering changing this parameter, you may need to contact Plumtree Group Support for advice.

2.6.2 SET-UP DOCUMENT STORE FIELD DEFINITION.



Figure 5 : Document Store Parameter.

❖Document Store Path:-

Description	:	The central repository for all scanned documents / images.
Type	:	Input Box
Information Type	:	Alphabetic and Numeric characters
Mandatory	:	Yes
Minimum Length	:	1
Maximum Length	:	60

2.7 SET ARCHIVING.

2.7.1 SET ARCHIVING DESCRIPTION.

Archiving is useful if your organisation is looking to release disk space from the **Central Repository**.

The Directory Name that is configured within this parameter directs Dart EDM to which location all **Archived Documents** must reside. Dart EDM will take the **Documents / Images** from the **Central Repository** location and make a copy in the archived location. The original **Documents / Images** in the **Central Repository** are deleted.

This parameter can contain the files location in any of the following formats:-

- Physical Address for example C:\<sub-directories>\
- UNC Address for example \\<server>\<sub-directories>

Mapped drives are also acceptable.

The documents that remain in the Archive location are still included in the results of any “Meta Data” or Quick Searches.

PLEASE NOTE No compression takes place during archiving.

2.7.2 SET ARCHIVING FIELD DEFINITION.

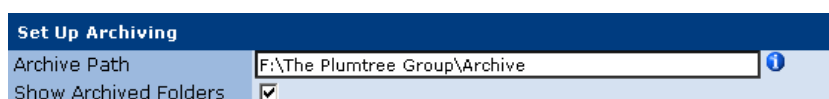


Figure 6 : Setup Archiving Parameter.

❖Archive Path:-

Description	:	A valid Directory path to any desktop.
Type	:	Input Box
Information Type	:	Alphabetic and Numeric characters
Mandatory	:	Yes
Minimum Length	:	1
Maximum Length	:	60

❖Show Archived Folders:-

Description	:	If this is checked, then the user will be able to see the archived folders within the Directory Tree listing.
Type	:	Check Box
Information Type	:	Alphabetic and Numeric characters

2.8 SET-UP E-MAIL SERVER.

2.8.1 SET-UP E-MAIL SERVER DESCRIPTION.

If Dart EDM is required to send documents to non Dart EDM users, the system must be configured to use an E-Mail Server located within the organisations infra-structure.

If you require any further information regarding the setup of an e-mail server for Dart EDM, then please contact the Dart EDM support Team.

2.8.2 SET-UP E-MAIL SERVER FIELD DEFINITION.



Figure 7 : Setup Email Server Parameter.

❖E-mail Server Name:-

Description	:	The name of a valid E-Mail Server located within the organisations infra-structure.
Type	:	Input Box
Information Type	:	Alphabetic and Numeric characters
Minimum Length	:	1
Maximum Length	:	66

2.9. USER LICENSING.**2.9.1 USER LICENSING DESCRIPTION.**

This parameter comes in the form of a licence key, which is made up of four segments, each containing four characters, and the actual number of licences purchased.

The “Licence key” and “User limit” entered must correspond; otherwise the system will reject the entry with an appropriate error message.

If you wish to increase the current number of licenses, you will need to speak to your Plumtree Group Account Manager, who will organise you a new “licence Key”.

The “Users Logged On”, indicates the total number of Dart EDM Users that are currently logged into the system.

PLEASE NOTE: This does not include Dart EDM Users that are assigned to the system as “Administrators”.

2.9.2 USER LICENSING FIELD DEFINITION.

User Licensing				
License Key	5PIP	ZS7Y	XXFX	BGCX
Users Limit	0			
Users Logged On	0			

Figure 8 : User Licensing Parameter.

❖Licence Key:-

Description	:	This must be a valid Licence Key, provided by the Plumtree Group Ltd.
Type	:	Input Box. See 2.8.1 User License Description for more information.
Information Type	:	Alphabetic and Numeric characters
Mandatory	:	Yes
Minimum Length	:	16 (4 block x 4 Alphanumeric Characters)
Maximum Length	:	16

❖Users Limit:-

Description	:	The number of concurrent users that are allowed to Dart EDM. See 2.8.1 User License Description for more information.
Type	:	Input Box
Information Type	:	Numeric characters Only
Mandatory	:	Yes
Minimum Value	:	1
Maximum Length	:	32,768

❖Users Logged On:-

Description	:	This indicates the total number of Users currently signed into the Dart EDM system. Note See 2.8.1 User License Description for more information.
Type	:	Display Only
Information Type	:	Alphabetic and Numeric characters
Mandatory	:	No

2.10 SET SESSION EXPIRY TIME.**2.10.1 SET SESSION EXPIRY TIME DESCRIPTION.**

The “Session Expiry Time” parameter determines how long this web session will continue to run.

2.10.2 SET SESSION EXPIRY TIME FIELD DEFINITION.

Set Session Expiry Time	
Session Time (in Minutes)	525600

Figure 9 : Session Expiry Time Parameter.

❖Session Time:-

Description	:	
Type	:	Input Box
Information Type	:	Numeric characters Only
Mandatory	:	Yes
Minimum Value	:	>0
Maximum Value	:	<525600

2.11 SET PASSWORD EXPIRY.**2.11.1 SET PASSWORD EXPIRY DESCRIPTION.**

The “Set Password Expiry” parameter determines how long the Dart EDM Users current password will exist (in days), before the system requests a new password.

If the value entered is Zero, this will disable the facility and therefore the existing password will never expire.

2.11.2 SET PASSWORD EXPIRY FIELD DEFINITION.

Set Password Expiry	
Password Expiry (in Days)	0

Figure 10 : Password Expiry Parameter.

Password Expiry:-

Description	:	The number of days before the password must be changed.
Type	:	Input Box
Information Type	:	Numeric characters only

Mandatory	:	Yes
Minimum Length	:	1
Maximum Length	:	2,147,483,647

2.12 DATABASE ADMINISTRATION.

2.12.1 DATABASE ADMINISTRATION DESCRIPTIN.

This functionality was used in prior releases of Dart EDM, it is no longer used.

2.12.2 DATABASE ADMINISTRATION FIELD DEFINITION.



Figure 11 : Database Administration Parameter.

❖Enable Global Lock:-

Description	:	No longer used within Dart EDM.
Type	:	Display Only

3.0 SYSTEM CONFIGURATION ACTIONS.

3.1 GROUP LICENCE MANAGEMENT.

3.1.1 GROUP LICENCE MANAGEMENT DESCRIPTION.

Without “Group License”, the licenses available within Dart EDM will be allocated to “Users” on a First Come, First Serve” basis, until there are no more licenses available.

The remaining Dart EDM users, will receive a message explaining that no more licenses are available, and will not be able to sign-on to the system.

If you have a large organisation with limited licenses, then this will eventually cause problems between the different Groups, Departments or Sites etc., where licenses are allocated unevenly.

Using Group licensing, you can alleviate this situation, by allocating a set of licenses to the different Groups, Departments or Sites etc. This way, Dart EDM Users will have a better share of the total number of licenses.

Obviously, if the number of licenses equals the number of Dart EDM Users within your organisation, then this facility will serve no purpose.

You can create as many Group Licenses as needed; each group can contain a mixture of “Individual User Names” and/or “Group names”.

Before you can remove a Group License, you must first remove all of the “Individual User Names” and “Group Names” from within the Group License (Refer “Group License Management Clear all Procedure”)

3.1.2 GROUP LICENCE MANAGEMENT FIELD DEFINITION.

Group License Management

Please enter the details for the new group.

Group License Details	
Total	50
Available	0
Group Name	Head Office
Licenses	30

Clear All Remove Group Add/Update Group

Users in selected group	
Admin Zero	
Manager Zero	

Figure 12 : Group License Management Screen.

3.1.2.1 GROUP LICENSE DETAILS.

❖Total:-

Description	:	This represents the number of licenses currently available.
Type	:	Display Only.

❖Available:-

Description	:	This represents the number of Licenses that are still available.
Type	:	Display Only.

❖Group Name:-

Description	:	The name of the new Group.
Type	:	Input Box.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes.
Minimum Length	:	1
Maximum Length	:	66

❖Licenses:-

Description	:	The number of licenses that you wish to allocate.
Type	:	Input Box.
Information Type	:	Numeric Only.
Mandatory	:	Yes.
Minimum Value	:	1
Maximum Value	:	The number of licenses shown in the Available field.

3.1.2.3 USERS IN SELECTED GROUP.

❖Users in Selected Group:-

Description	:	List of all Dart EDM Users that are currently allocated to this group.
Type	:	Display Only.

3.1.3.GROUP LICENCE MANAGEMENT CLEAR ALL PROCEDURE.

ACTION	RESPONSE
1. You will already have the Group License Management screen displayed, with a Dart User Groups selected.	→ See Fig 12. ↩
2. Select Clear All button.	→ The Group License Details section is cleared. ↩ The Users in selected group section is emptied.
3. Finished.	
Footnotes:-	

3.1.4 GROUP LICENCE MANAGEMENT REMOVE GROUP PROCEDURE

ACTION	RESPONSE
1. From the Home Screen , select the Configuration icon.	→ The Systems Configuration Screen is displayed. ↩
2. Using the Actions list, select Group License Management .	→ The Group License Management screen is displayed. ↩
3. Using Dart User Groups , select the Group you wish to remove.	→ Group License Management screen is populated with the data for the Group selected. ↩
4. Select Remove Group button.	→ Group deleted. ↩ The Group Name is no longer visible in the Users in selected group.
5. Finished.	
Footnotes:-	

3.1.5 GROUP LICENCE MANAGEMENT ADD GROUP PROCEDURE

ACTION	RESPONSE
1. From the Home Screen , select the Configuration icon.	→ The Systems Configuration Screen is displayed. ↩
2. Using Actions , select Group License Management .	→ The Group License Management screen is displayed. ↩

3. Using **Group License Details** enter the **Group name** in the box provided.
4. Using **Licenses** enter the number of license in the box provided.
5. Select **Add/Update Group** button.
6. Finished.

Footnotes:-



Group License Details	
Total	20
Available	17
Group Name	GroupLic01
Licenses	1
Clear All Remove Group Add/Update Group	



GroupLic01 added successfully.

3.1.6 GROUP LICENCE MANAGEMENT UPDATE PROCEDURE

ACTION

RESPONSE

- | | |
|--|--|
| 1. From the Home Screen , select Configuration icon. | →
↩ The Systems Configuration Screen is displayed. |
| 2. Using Actions , select Group License Management . | →
↩ The Group License Management screen is displayed. |
| 3. Using Dart User Groups , select the Group you wish to Update. | →
↩ The Group License Details for the Dart User Group is populated. |
| 4. Within Group License Details , modify the information in the boxes provided ¹ . | ↩ |
| 5. Select Add/Update Group button. | →
↩ License update successful. |
| 6. Finished. | |

Footnotes:-

¹You cannot change the “Group Name” during the Update procedure. In order to change the “Group Name” you will need to “Remove Group” and then “Add Group”.

3.2 USER LICENSE MANAGEMENT.

3.2.1 USER LICENSE MANAGEMENT DESCRIPTION.

User License Management allows the administrator to maintain the users/groups within the group management facility.

3.2.2 USER LICENCE MANAGEMENT FIELD DEFINITION.

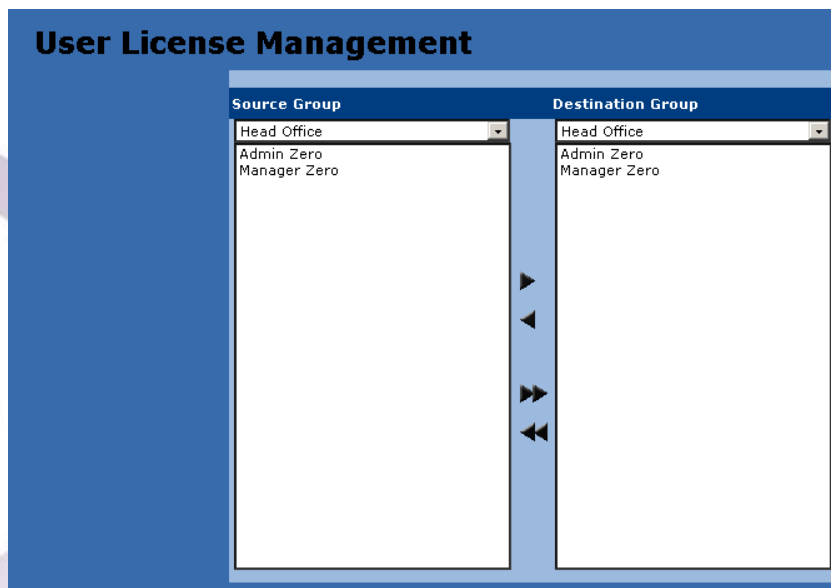


Figure 13 : User License Management Screen.

3.2.2.1 SOURCE GROUP SECTION.

❖ Source Group:-

Description	:	Contains the Users/Groups that currently exist in the Source Management Group.
Type	:	List Box.

3.2.2.2 DESTINATION GROUP SECTION.

❖ Destination Group:-

Description	:	Contains the Users/Groups that currently exist in the Destination Management Group.
Type	:	List Box.

3.2.2.3 SYMBOLS DESCRIPTION.

❖ ▶:-

Description	:	Move “Selected Entry” from the Source Group list and transfer to the Destination Group .
Type	:	Action Symbol.

❖ ◀:-

Description	:	Move “Selected Entry” from the Destination Group list and transfer to the Source Group .
Type	:	Action Symbol.

❖ ▶▶:-

Description	:	Move “All Entries” from the Source Group list and transfer to the Destination Group .
Type	:	Action Symbol.

❖ ◀◀:-

Description	:	Move “All Entries” from the Destination Group list and transfer to the Source Group .
Type	:	Action Symbol.

3.2.3 USER LICENSE MANAGEMENT- ADD USER TO LICENCE GROUP PROCEDURE

ACTION	RESPONSE
1. From the Home Screen , select the Configuration icon.	➔ The Systems Configuration Screen is displayed.
2. Using Actions list, select User License Management .	➔ The User License Management screen is displayed.
3. Using Source Groups , select the User/Group from the dropdown list provided.	➔ A list of current Users/Groups is displayed in the Source Group .
4. Using Destination Groups select the User /Groups from the dropdown list provided.	➔ A list of current Users/Groups is displayed in the Destination Group .
5. Select a User/Group Name from the Source Group and transfer using the ► symbol.	➔ The User/Group Name is transferred from the Source Group to the Destination Group
6. Finished.	

Footnotes:-

3.2.4 USER LICENSE MANAGEMENT- REMOVE USER FROM LICENCE GROUP PROCEDURE.

ACTION	RESPONSE
1. From the Home Screen , select the Configuration icon.	➔ The Systems Configuration Screen is displayed.
2. Using Actions list, select User License Management .	➔ The User License Management screen is displayed.
3. Using Source Groups , select the User/Group from the dropdown list provided.	➔ A list of current Users/Groups is displayed in the Source Group .
4. Using Destination Groups select the User /Groups from the dropdown list provided.	➔ A list of current Users/Groups is displayed in the Destination Group .
5. Select a User/Group name from the Destination Group and transfer using the ◀ symbol.	➔ The User/Group Name is transferred from the Destination Group to the Source Group .
6. Finished.	

Footnotes:-

3.3 FILE PERMISSIONS.

3.3.1 FILE PERMISSIONS DESCRIPTION.

In order for any “individual user” or “group of users” to gain access to a particular Work Area or folder within Dart EDM, they must first be assigned to that Work Area or Folder, and then the appropriate permissions are set.

Using the File Permissions functionality you are able to:-

- Allocate Users or Groups to Work Area’s or Folders.
- Remove Users or Groups from Work Area’s or Folders
- Select the appropriate **Permissions** at the “Individual User” or “Group” level.
- Deny Access to Work Area’s or Folders.

If you have added a particular user to a group, but you would like to give permissions to the user that is not available to the group. Then you must also add the user at the individual level and set the different permissions. The user permissions will have preference over the group permissions.

“Apply permission to all child folders” must be used with caution. Setting this option could inadvertently give an individual user or Group access to information that is restricted. If you are unsure, then you should set the permissions at the individual folder level.

3.3.2 FILE PERMISSIONS FIELD DEFINITION.

Figure 14 : File Permissions Screen.

3.3.2.1 PERMISSIONS SECTION.

❖View Documents:-

Description : The User is able to open and view the documents within this folder.
Type : Check Box.

❖Create:-

Description : The User is able to create new documents within this folder.
Type : Check Box.

❖Delete:-

Description : The User is able to delete documents within this folder.
Type : Check Box.

❖Re-Name:-

Description	:	The User is able to rename documents within this folder.
Type	:	Check Box.
❖Write (Check Out/In):-		
Description	:	The User is able to rename documents within this folder.
Type	:	Check Box.
❖Move:-		
Description	:	Drag and Drop Documents from one folder to another folder.
Type	:	Check Box.
❖Re-cycle:-		
Description	:	Make the Re-Cycle bin available to the user for removing documents.
Type	:	Check Box.
❖Archive:-		
Description	:	The user is able to archive documents.
Type	:	Check Box.
❖Deny Access:-		
Description	:	The user is denied access to this folder.
Type	:	Check Box.
❖Apply permissions to all child folders:-		
Description	:	Apply all the above permissions to the sub level folders.
Type	:	Check Box.

3.2.2.2 USER/GROUPS AVAILABLE.

Having selected a folder from the Directory Tree, the list contains all of the current User's/Groups available for selection.

3.2.2.3 USER/GROUPS ASSIGNED.

Having selected a folder from the Directory Tree, the list contains all of the current User's/Groups currently assigned.

3.2.2.4 SYMBOL DESCRIPTION.

❖▶:-

Description	:	Move the "Selected Entry" from the "Users/Groups Available" list and transfer to the "Users/Groups Assigned".
Type	:	Action Symbol

❖◀:-

Description	:	Move the "Selected Entry" from the "Users/Groups Assigned" list and transfer to the "Users/Groups Available".
Type	:	Action Symbol

❖▶▶:-

Description	:	Move “All Entries” from the “Users/Groups Available” list and transfer to the “Users/Groups Assigned”.
Type	:	Action Symbol
❖◀◀:-		
Description	:	Move “All Entries” from the “Users/Groups Assigned” list and transfer to the “Users/Groups Available”.
Type	:	Action Symbol

3.3.3 FILE PERMISSIONS SELECT ALL PROCEDURE

ACTION	RESPONSE
1. You already have File Permissions displayed, and a folder selected from the Directory Tree .	↙ See fig 14.
2. Click Select All button.	➔ ↙ All Group Permissions are checked.
3. Click Update button.	➔ ↙ smtest updated.
4. Finished.	

Footnotes:-

3.3.4 FILE PERMISSIONS CLEAR ALL PROCEDURE

ACTION	RESPONSE
1. You already have File Permissions displayed, and some Group Permissions are checked.	↙ See Fig 14.
2. Click Clear All button.	➔ ↙ All Group Permissions are cleared.
3. Click Update button.	➔ ↙ smtest updated.
4. Finished.	

Footnotes:-

3.3.5 FILE PERMISSIONS ADD PROCEDURE

ACTION	RESPONSE
--------	----------

1. From the **Home** screen, select **Configuration**. → The **Systems Configuration** screen is displayed.
2. From the **Actions List**, select **File Permissions**. → The **File Permissions** screen is displayed.
3. From the **Directory Tree**, select the **Work Area / Folder** that permissions must apply. → The Selected **Work Area / Folder** is highlighted.
4. If you are creating an **Individual User or Group**.

Message:-
 Group 01 added. Update

 → **User/Group** will be displayed in the **Users/Groups Assigned** list.
5. From the **Users/Groups Available**, select the **Individual User or Group**. → **User / Group** will no longer be available in the **Users/Groups Available** list.
6. Click “▶” action symbol.

OR

7. If you are assigning **All Users and Groups**. → All Users/Group will be displayed in the “**Users/Groups Assigned**” list.
8. Click “▶▶” action symbol.
 All User/Group will no longer be available in the “**Users/Groups Available**” list.
9. Finished.

Footnotes:-

3.3.6 FILE PERMISSION UPDATE PROCEDURE

ACTION		RESPONSE
1. From the Home Screen , select Configuration .	→	The Systems Configuration screen is displayed.
2. From the Actions List , select File Permissions .	→	The File Permissions screen is displayed.
3. From the Directory Tree , select the Work Area/Folder that permissions must apply.	→	The Selected Work Area / Folder is highlighted.
4. You are updating an Individual User/Group .		Message:- Group 01 added. Update
5. From the Users/Groups Available , select the Individual User or Group .	→	User/Group will be displayed in the “ Users/Groups Assigned ” list.
6. Click “▶” action symbol.		User / Group will no longer be available in the “ Users/Groups Available ” list.

Or

7. You are updating All **Users/Groups**.

8. Click “▶▶” action symbol.

9. Set File Permissions.

10. Finished.

Footnotes:-

Message:-

All users/groups added. Update

➔ All Users/Group will be displayed in the
⬅ “Users/Groups Assigned” list.

All User/Group will no longer be available in the
“Users/Groups Available” list.

➔ See 3.3.3.5 File Permission Settings.
⬅

3.3.7 FILE PERMISSION SETTINGS PROCEDURE

ACTION	RESPONSE
1. From the Home Screen , select Configuration .	➔ The Systems Configuration screen is displayed. ⬅
2. From the Actions List , select File Permissions .	➔ The File Permissions screen is displayed. ⬅
3. From the Directory Tree , select the Work Area/Folder that permissions must apply.	➔ The Selected Work Area/Folder is highlighted. ⬅
4. Select Individual Permissions required.	⬅
or	
5. Click Select All button.	➔ All Permissions are checked. ⬅
or	
6. Click Update button.	➔ smtest updated. ⬅
7. Finished.	

Footnotes:-

3.4 GROUP MANAGEMENT.

3.4.1 GROUP MANAGEMENT DESCRIPTION.

Group Management is used to divide the various Dart Users into different types of categories.

3.4.2 GROUP MANAGEMENT FIELD DEFINITION.

Figure 15 : Group Management Screen.

3.4.2.1. USER GROUP DETAILS

❖Group Name:-

Description	:	The name to be allocated to this group.
Type	:	Input Box.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes.
Minimum Length	:	1
Maximum Length	:	60

❖Description:-

Description	:	Further information to describe the Group.
Type	:	Display Only.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	No.
Minimum Length	:	1
Maximum Length	:	60

❖Region:-

		For Dart AIM use only. If you are not using Dart AIM, then leave this as the default of "ANY". For more information, refer to the Dart AIM Administrators Manual.
Description	:	
Type	:	Check Box.
Mandatory2008	:	No

3.4.2.2 GROUP PERMISSIONS

❖Manage Users:-

Description	:	Check the box, if this Dart EDM User is to "Manage Users" within the system.
Type	:	Check Box
Mandatory	:	No

❖Create Document Indexes:-

Description	:	Check the box, if this Dart EDM User is to "Create Document Indexes" within the system.
-------------	---	--

Type : Check Box

Mandatory : No

❖ Access Logs:-

Description : Check the box, if this **Dart EDM User** is to “Manage Users” within the system.

Type : Check Box

Mandatory : No

❖ Manage Groups:-

Description : Check the box, if this **Dart EDM User** is to “Manage Groups” within the system.

Type : Check Box

Mandatory : No

❖ Manage File Permissions:-

Description : Check the box, if this **Dart EDM User** is to “Manage File Permissions” within the system.

Type : Check Box

Mandatory : No

❖ Rollback Checkouts:-

Description : Check the box, if this **Dart EDM User** is to “Rollback Checkouts” within the system.

Type : Check Box

Mandatory : No

❖ Administrator User:-

Description : Check the box, if this **Dart EDM User** is to “Administrator User” within the system.

Type : Check Box

Mandatory : No

3.4.3 GROUP MANAGEMENT CLEAR ALL PROCEDURE

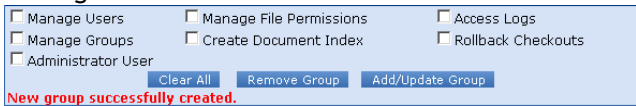
ACTION	RESPONSE
1. You will already have Group Management displayed and the User Group Details will contain information.	➡ See fig 15.
2. Click Clear All button.	➡ All User Group Details information is now cleared.
3. Finished.	

Footnotes:-

3.4.4 GROUP MANAGEMENT REMOVE PROCEDURE

ACTION	RESPONSE
1. From the Home Screen , select Configuration .	→ The Systems Configuration screen is displayed. ↩
2. From the Actions List , select Group Management .	→ The Group Management screen is displayed. ↩
3. From the Dart User Groups section, select the Group you want to update.	→ The User Group Details information is populated. ↩
4. Click Remove Group button.	→ The Group no longer appears in the Dart User Groups list. ↩
5. Finished.	
Footnotes:-	

3.4.5 GROUP MANAGEMENT ADD PROCEDURE

ACTION	RESPONSE
1. From the Home Screen , select Configuration .	→ The Systems Configuration screen is displayed. ↩
2. From the Actions List , select Group Management .	→ The Group Management screen is displayed. ↩
3. Enter Group Name in the box provided.	→ See 3.4.2.1 User Group Details for more information. ↩
4. Enter Description in the box provided (if required)	→ See 3.4.2.1 User Group Details for more information. ↩
5. Select Group Permissions , by checking their box.	→ See 3.4.2.2 Group permissions for more information. ↩
6. Click the Add/Update Group button.	Message:-  New Group appears in the Dart User Groups.
7. Finished.	
Footnotes:-	

3.4.6 GROUP MANAGEMENT UPDATE PROCEDURE

ACTION	RESPONSE
--------	----------

1. From the **Home Screen**, select **Configuration**.



The **Systems Configuration** screen is displayed.

2. From the **Actions List**, select **Group Management**.



The **Group Management** screen is displayed.

3. From the **Dart User Groups** section, select the Group for Update.

The **User Group Details** information is populated.

4. Make necessary changes.¹



5. Click the **Add/Update Group** button.



Message:-

☐ Manage Users	☐ Manage File Permissions	☐ Access Logs
☐ Manage Groups	☐ Create Document Index	☐ Rollback Checkouts
☐ Administrator User		
Clear All Remove Group Add/Update Group		
Group details successfully updated.		

6. Finished.

Footnotes:-

¹You cannot change the Group Name field using Update, you must first Remove and Re-Add the Group with the new Group Name.

3.5 USER MANAGEMENT.

3.5.1 USER DETAILS.

3.5.1.1 GENERAL

When Dart EDM is initially installed, the system automatically defines the following accounts:-

GA Global Account.
SA Systems Account.

These accounts are used primarily by “The Plumtree Group” personnel during Software Support/Maintenance or Software upgrades.

Control of these accounts can be done using the GA or SA logon only.

3.5.1.2 PASSWORD

Dart EDM requires that every “User” must be assigned a password. The system verifies the “Password Strength Indicator (PSI)”, by showing an indicator:-

RED : This password is not acceptable.

You will not be able to create the User, with this password.

ORANGE : This password is acceptable, but could be stronger.

The password is at least 6 characters in length.

GREEN : This password is acceptable, Strong.

The password is greater than 6 characters in length.

The password contains at least 1 numeric character.

3.5.1.3 AUTHENTICATION

The Dart EDM user can log into the system using their Microsoft Windows Username/Password.

Also see **Active Directory Configuration**.

3.5.1.4 RESERVED LICENSE USER

Reserving a license to an individual **Dart EDM** user ensures that the User will always have a login to the system when other **Dart EDM** users may not.

Effectively, you are removing a license from the available pool, regardless of whether the Reserved User is logged onto the system.

3.5.1.5 AUTOMATED INVOICE MANAGEMENT (AIM)

Automated Invoice Management (AIM) is considered another application that works in conjunction with Dart EDM, and manages the authorisation workflow of invoices within the company. This application is beyond the scope of the Dart EDM Administrators Manual.

Checking this option will instruct Dart EDM that they are also considered at Dart AIM User, and the **AIM** option will appear in the **Main Menu** Section.

Please refer to the Dart AIM Administrator and User Manual for more information.

3.5.2 PERMISSIONS.

3.5.2.1 MANAGE USERS

“Manage Users” instructs Dart EDM that this User can Add/Change/Delete Users.

This does not include their account, the GA and the SA logon accounts.

3.5.2.2 CREATE DOCUMENT INDEXES

“Create Document Indexes” instructs Dart EDM that this User can Add/Delete Indexes.

3.5.2.3 ACCESS LOGS

“Access Logs” instructs Dart EDM that this User can have access to all reports in the Main Menu > Reports section.

3.5.2.4 MANAGE GROUPS

“Manage Groups” instructs Dart EDM that this User can Add/Change/Delete Groups.

3.5.2.5 MANAGE FILE PERMISSIONS

“Manage File Permissions” instructs Dart EDM that this User can Add/Change/Delete file permission on the

folders that are visible to a User.

3.5.2.6 ROLLBACK CHECKOUTS

“Rollback Checkouts” allow the User to rollback “Check IN/Check OUT” to previous versions if required.

3.5.2.7 ADMINISTRATOR USER

Checking this box will give the Dart EDM User access to all of the above mentioned permissions.

Dart EDM will always check this permission, and will bypass any other permission checks, allowing the Dart EDM User full access to the entire Dart EDM system.

If you check this box, you are not required to check the other permissions.

3.5.3 USER MANAGEMENT FIELD DEFINITION.

User Management

Please enter the details for the new user.

User Details	
First Name	
Last Name	
Email Address	
User Name	
Password	
Re-Type Password	
Home Page	Home
Document Index	All
Description	
Authentication	Dart
Reserved License User	☐
AIM Enabled User	☐
Licensing Group	Please select licensing group...

Permissions		
☐ Manage Users	☐ Create Document Indexes	☐ Access Logs
☐ Manage Groups	☐ Manage File Permissions	☐ Rollback Checkouts
Select All		
☐ Administrator User		

[Clear All](#)
[Remove User](#)
[Add/Update User](#)

Figure 16 : User Management Screen.

3.5.2.1 USER DETAILS SECTION

❖First Name:-

Description	:	The First Name of the User.
Type	:	Input Box.
Mandatory	:	Yes.
Information Type	:	Alphabetic and Numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖Last Name:-

Description	:	The Last Name of the User.
-------------	---	----------------------------

Type	:	Input Box.
Mandatory	:	Yes.
Information Type	:	Alphabetic and Numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖Email Address:-

Description	:	The E-Mail address of the User.
Type	:	Input Box.
Mandatory	:	No.
Information Type	:	Alphabetic and Numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖User Name:-

Description	:	The User Name which is used with the Dart EDM Login Screen.
Type	:	Input Box.
Mandatory	:	No.
Information Type	:	Alphabetic and Numeric characters.
Minimum Length	:	1
Maximum Length	:	60

❖Password:-

Description	:	The Password which is used with the Dart EDM Login Screen (See 3.5.1 User Management Description for more information).
Type	:	Input Box.
Mandatory	:	Yes.
Information Type	:	Alphabetic and Numeric characters.
Minimum Length	:	6
Maximum Length	:	60

❖Re-Type Password:-

Description	:	Re-Type the Password used in the previous field, so that the system may verify that you have entered the correct Password.
Type	:	Input Box.
Mandatory	:	Yes.
Information Type	:	Alphabetic and Numeric characters.
Minimum Length	:	6
Maximum Length	:	60

❖Home Page:-

Description	:	The Dart EDM screen that will appear when the User Logs in.
Type	:	Drop Down Selection.
Mandatory	:	No.

❖Document Index:-

Description	:	The Document Index that will be used as default during Search.
-------------	---	--

Type : Drop Down Selection.

Mandatory : No.

❖Description:-

Description : Additional information about the User.

Type : Input Box.

Mandatory : No.

Information Type : Alphabetic and Numeric characters.

Minimum Length : 1

Maximum Length : 60

❖Authentication:-

Description : The Dart EDM user has the option of signing into the system using his/her Microsoft Windows credentials. This is the Domain Name where the credentials are stored.

Type : Drop Down Selection.

Mandatory : No.

❖Reserved License User:-

Description : If this Dart EDM User is permanently allocated a license (Refer 3.5.1 User Management Description for more information).

Type : Check Box.

Mandatory : No.

❖AIM Enabled User:-

Description : Is this Dart EDM User an Automated Invoice Management (AIM) user See 3.5.1 User Management Description for more information)?

Type : Check Box.

Mandatory : No.

❖Licensing Group:-

Description : If you are using the “Licensing Group” functionality. Select “License Group” otherwise.

Type : Drop Down Selection Box.

Mandatory : Yes.

Information Type : Alphabetic and Numeric characters.

3.5.2.2 PERMISSIONS SECTION

❖Manage Users:-

Description : Check the box, if this Dart EDM user is to “Manage Users” within the system.

Type : Check Box.

Mandatory : No.

❖Create Document Indexes:-

Description : Check the box, if this Dart EDM user is to “Create Document Indexes” within the system.

Type : Check Box.

Mandatory : No.

❖ Access Logs:-

Description : Check the box, if this Dart EDM user is to “Manage Users” within the system.

Type : Check Box.

Mandatory : No.

❖ Manage Groups:-

Description : Check the box, if this Dart EDM user is to “Manage Groups” within the system.

Type : Check Box.

Mandatory : No.

❖ Manage File Permissions:-

Description : Check the box, if this Dart EDM user is to “Manage File Permissions” within the system.

Type : Check Box.

Mandatory : No.

❖ Rollback Checkouts:-

Description : Check the box, if this Dart EDM user is to “Rollback Checkouts” within the system.

Type : Check Box.

Mandatory : No.

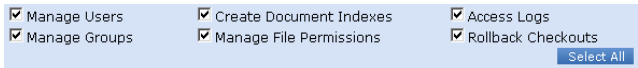
❖ Administrator User:-

Description : Check the box, if this Dart EDM user is to “Administrator User” within the system.

Type : Check Box.

Mandatory : No.

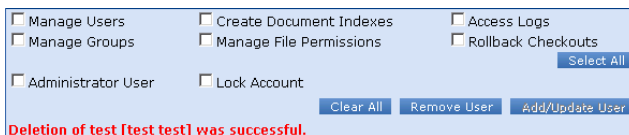
3.5.4 USER MANAGEMENT SELECT ALL PROCEDURE.

ACTION	RESPONSE
1. You will already have User Management screen displayed.	↩ See Figure 16.
2. You have already completed the User Details section.	↩ See 3.5.7 User Management Add Procedure.
3. Click Select All button.	→ ↩ All Permissions check boxes are now checked. 
4. Finished.	
Footnotes:-	

3.5.5 USER MANAGEMENT CLEAR ALL PROCEDURE.

ACTION	RESPONSE
1. You will already have User Management screen displayed, and the User Details will contain information.	↙ See Figure 16.
2. Click Clear All button.	→ ↙ All User Details information boxes are cleared.
3. Finished.	
Footnotes:-	

3.5.6 USER MANAGEMENT REMOVE USER PROCEDURE.

ACTION	RESPONSE
1. From the Main Menu , select Configuration icon.	↙ The System Configuration screen is displayed.
2. Using the Actions list, select User Management by clicking the name.	↙ The “ User Management ” screen is displayed.
3. Using the “ Dart Users ” list, select the User Name .	→ ↙ The User Details panel is populated with the User Name field values. Message :
4. Click Remove button.	→ ↙ 
5. Finished.	User Name no longer visible in the Dart Users List .
Footnotes:-	

3.5.7 USER MANAGEMENT ADD PROCEDURE.

ACTION	RESPONSE
1. From the Main Menu , select Configuration icon by clicking.	→ ↙ The “System Configuration” screen is displayed.
2. Using the Actions list, select User Management by clicking the name.	→ ↙ The “User Management” screen is displayed.

3. Complete the **User Details Section** by entering in the information in the boxes provided.

User Details Section.

See 3.5.2.1 User details section for more information.

4. Select Permissions associated with this user by checking the appropriate check boxes¹.

See 3.5.2 Permissions section for more information.

Message:-

5. Click **add/update User** button.

User Name visible in **Dart Users List**

6. Finished.

Footnotes:-

¹You can shortcut the checking of all the boxes, by clicking the “Select All” button.

3.5.8 USER MANAGEMENT UPDATE PROCEDURE.

ACTION	RESPONSE
1. From the Main Menu , select Configuration icon.	↙ The System Configuration screen is displayed.
2. Using the Actions list, select User Management by clicking the name.	↙ The “ User Management ” screen is displayed.
3. Using the “ Dart Users ” list, select the User Name to be updated.	➔ The User Details panel is populated with the User Name field values.
	Message :
4. Make all necessary changes in the User Details panel	➔ ↙
	User Name no longer visible.

5. Click **Add/Update** button.
6. Finished.

Footnotes:-

3.6 DOCUMENT INDEX MANAGEMENT.

3.6.1 DOCUMENT INDEX MANAGEMENT DESCRIPTION.

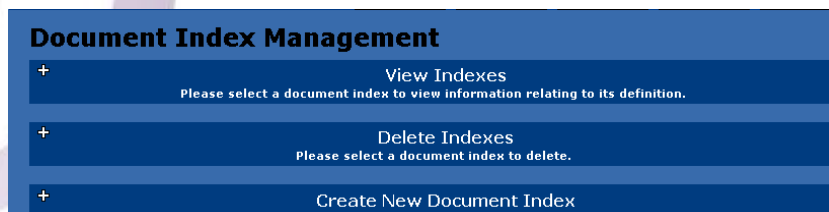


Figure 17 : Document Index Management Screen.

3.6.2 VIEW INDEXES FIELD DEFINITION.



Figure 18 : View Index Screen.

❖Document Index Name:-

- Description : The internal name for the Document Index.
- Type : Drop Down Selection.

3.6.3 VIEW INDEXES PROCEDURE.

ACTION	RESPONSE
1. From the Home screen, select Configuration icon.	➔ ↙ The System Configuration screen is displayed
2. From Actions list, select Document Index Management .	➔ ↙ The Document Index Management screen is displayed.
3. Click the “+” action symbol for View Indexes .	➔ ↙ 
4. Using Document Index Name , select the Document Index you wish to view.	➔ ↙ All Document Index field name and Settings are displayed.
5. Finished.	

Footnotes:-

You have the facility to Attach/Re-Attach an Associated licensing group.

3.6.4 UPDATE ASSOCIATING LICENSING GROUPS PROCEDURE.

ACTION	RESPONSE
1. From the Home screen, select Configuration icon.	→ ↩ The System Configuration screen is displayed
2. From Actions list, select Index Management .	→ ↩ The Document Index Management screen is displayed.
3. Click the “+” symbol for View Indexes .	→ ↩ 
4. Using Document Index Name , select the Document Index you wish to update.	→ ↩ All Document Index field name and settings are displayed. All Associating Licensing Groups are displayed.
5. Check the boxes for each Licensing Groups associated with this Document Index .	↩
6. Click Update License Group button.	→ ↩ Message:- License group updated
7. Finished.	

Footnotes:-

You have the facility to Attach/Re-Attach an Associated licensing group.

3.6.5 DELETE INDEXES FIELD DEFINITION.



Figure 19 : Delete Indexes Screen.

❖Document Index Name:-

Description : The internal name for this Document Index.
Type : Drop Down Selection.

3.6.6 DELETE INDEXES PROCEDURE

ACTION	RESPONSE
1. From the Home screen, select Configuration icon.	→ ↩ The System Configuration screen is displayed.

2. From Actions list, select Document Index Management.

→
↙ The **Document Index Management** screen is displayed.

3. Click the “+” symbol for **Delete Indexes**.

→
↙

4. Using **Document Index Name**, select the Document Index you wish to delete.

→
↙ The selected **Document Index** name is displayed.

5. Click the Delete Document Index button.

→
↙

6. Click **OK** button

→
↙

7. Finished.

Footnotes:-

3.6.7 CREATE NEW DOCUMENT INDEX FIELD DEFINITION.

Figure 20 : Create New Document Index Screen.

❖New Document Index Name:-

Description : The name that is to be given to the new document Index.
 Type : Input box.
 Information Type : Alphabetic and Numeric characters.
 Mandatory : Yes.
 Minimum Length : 1
 Maximum Length : 66

❖Licensing Group:-

Description	:	You are required to check one of the Licensing Group .
Type	:	Check Box.
Mandatory	:	Yes

3.6.8 CREATE NEW DOCUMENT INDEX PROCEDURE

ACTION	RESPONSE
1. From the Home screen, select Configuration icon.	→ ↙ The System Configuration screen is displayed
2. From Actions list, select Document Index Management .	→ ↙ The Document Index Management screen is displayed.
3. Click the “+” action symbol for Create New Document Index .	↙
4. Enter New Document Index Name in the box provided.	→ ↙ 
5. Using the Licensing Group options available, select a Licensing Group .	→ ↙ 
6. Enter Field Name in box provided	↙
7. Using Data Type selection box, select type of data from drop down list box.	↙
8. Enter the Size in the field provided.	↙
9. Check the Mandatory box if required.	↙
10. Repeat steps 12 through 15 for each additional Field Name .	↙
11. Click Save Document Index on completion.	→ ↙ 
12. Finished.	

Footnotes:-

The initial screen contains 10 **Field Names**; if you require additional **Field Names** then you will need to click the **Add Field** button.

3.7 CHANGE PASSWORD.**3.7.1 CHANGE PASSWORD DESCRIPTION.**

If you have a requirement to change your own password, then you can use the **Change Password** procedure.

Within the **Change Password** procedure, you will need to know the old password in order to change it for a new

password.

If you cannot change your password for any reason, then you will need to speak to your local Dart EDM Administrator.

3.7.2 CHANGE PASSWORD FIELD DEFINITION.

Figure 21 : Change Password Screen.

❖Old Password:-

Description	:	Enter your old password.
Type	:	Input Box.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes.
Minimum Length	:	6
Maximum Length	:	66

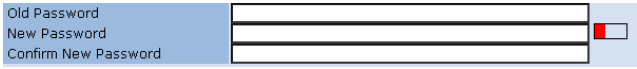
❖New Password:-

Description	:	Enter your new password.
Type	:	Input Box.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes.
Minimum Length	:	6
Maximum Length	:	66

❖Confirm New Password:-

Description	:	Re-type your new password.
Type	:	Input Box.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes.
Minimum Length	:	6
Maximum Length	:	66

3.7.3 CHANGE PASSWORD FIELD PROCEDURE.

ACTION	RESPONSE
1. From the Home screen, select Configuration .	→ The Systems Configuration screen is displayed. ↩
2. From the Actions list, select Change Password .	→ See figure 21. ↩
3. Enter Old Password in the box provided.	→ 
4. Enter New Password in the box provided.	→ Please note the password strength indicator. See 3.5.1.2 Password section for more information. ↩

5. Confirm **New Password** in the box provided.

6. Click **OK** button.

➔ You are returned to the **System Configuration** screen.

7. Finished

Footnotes:-

3.8 BARCODE CREATOR

3.8.1 BARCODE CREATOR DESCRIPTION.

With Barcode creator the user is able to generate and print barcode labels (one label at a time).

The system will create the following Barcodes:-

- Barcode Type 39.
- Barcode Type 128.

See BARCODE CREATOR PROCEDURE for more information.

3.8.2 BARCODE CREATOR FIELD DEFINITION.

Figure 22 : Barcode 39 /128 Creator Screen.

❖Top Text:-

Description	:	Text will appear on the top of the barcode.
Type	:	Input Box.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	Yes.
Minimum Length	:	1
Maximum Length	:	66

❖Barcode Text:-

Description	:	Whatever is typed into here, will be converted to the barcode symbology.
Type	:	Input Box.
Mandatory	:	Yes.
Information Type	:	Alphabetic and Numeric characters.
Minimum Length	:	1
Maximum Length	:	66

❖Quantity:-

Description	:	The number of barcodes required.
Type	:	Input Box.

Mandatory	:	Yes.
Information Type	:	Numeric characters Only.
Minimum Value	:	1
Maximum Value	:	66

3.8.3 BARCODE CREATOR PROCEDURE.

ACTION	RESPONSE
1. From the Home screen, select Configuration .	↙ The Systems Configuration screen is displayed.
2. From the Actions list, select Barcode Creator .	↙ See Figure 22.
3. Enter Top Text in the box provided.	
4. Enter Barcode Text in the box provided.	→ ↙
5. Enter Quantity in the box provided.	
6. Click the Create button.	→ ↙
7. Click either the Print39 or Print 128 buttons, to send the output to the printer.	↙
8. Finished.	

Top Text

Barcode Text

Quantity

Barcode 39/128 Creator

Top Text: test

Barcode Text: test

Quantity: 1

Code 39: test

Code 128: test

Create Print 39 Print 128

Footnotes:-

3.9 FOLDER ARCHIVING.

3.9.1 FOLDER ARCHIVING DESCRIPTION.

In the background, Dart EDM is continuously accumulating a vast amount of imagery data, and information associated with those images. Bearing this in mind, you may have a requirement to historically keep the information that you are accumulating for a number of years, depending on your circumstances. Eventually, you will have to make the decision of either removing the data permanently, or archive the information to another location.

In order to archive existing information within Dart EDM, you are required to perform the following steps:-

- Install the Dart Archive program.
- Create a “Windows Task Schedule” that will execute the Dart Archive program on a regular basis.

- Identify which folders within Dart EDM will be included in the Archiving process.

You can only archive at the folder level, you cannot archive individual documents. When the folder has been archived the colour of the folder will change from the usual yellow, to a grey.

PLEASE NOTE: When users perform Quick/Meta searches, the archived information is still included in the results of the search.

3.9.2 FOLDER ARCHIVING FIELD DEFINITION.

Folder Archiving	
Marked for archive	No
Is archived	No
Can be archived	Yes
Apply to child folders	☐

Mark for Archive Never Archive

Figure 23 : Folder Archiving Screen.

❖Marked for archive:-

Description	:	This field indicates whether the folder is marked for archive, but has not yet been processed through the Dart EDM Archive program.
		No This folder has not been “Marked for Archive” Yes This folder has been “Marked for Archive”
Type	:	Display box Only.

❖Is archived:-

Description	:	This field indicates whether the folder is already archived and has already been processed through the Dart EDM program.
		No This folder has not yet been processed through the Dart EDM program. Yes This folder is has already been processed through the Dart EDM program.
Type	:	Display box Only.

❖Can be Archived

Description	:	This will give you an indication on whether you are able to archive this folder.
Type	:	Display box Only.

❖Apply to Child Folders:-

Description	:	If you check this box, then you are telling the Dart EDM to propagate the permission to all child folders.
Type	:	Display box Only.
Information Type	:	Alphabetic and Numeric characters.
Mandatory	:	No.
Minimum Length	:	
Maximum Length	:	

3.9.3 FOLDER ARCHIVING PROCEDURE.

ACTION	RESPONSE
1. From the Home Screen, select Configuration.	↙ The System Configuration is displayed.
2. From the Actions list, select Folder Archive .	↙
3. Using the Directory Tree , navigate to the Work Area/Folder that will be archived.	➔ ↙ The Work Area/Folder is highlighted.
4. Check Apply to child folder, if required	➔ ↙ See 3.9.2 folder archiving field definition.
5. Click the Mark for Archive button.	
6. Finished.	

Footnotes:-

3.10 SOLUTION CONFIGURATION

3.10.1 SOLUTION CONFIGURATION DESCRIPTION.

This section of Dart EDM can only be accessed using the Super Administrator (SA) account.

If you would like to incorporate any of the functionality associated with Solution Configuration, you will need to call the Plumtree Group Ltd Support number 0115 937 6661 during normal working hours.

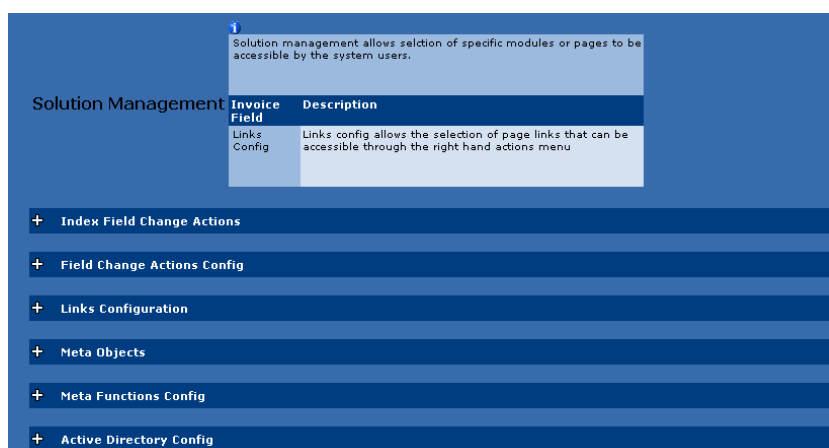


Figure 24 : Solution Configuration Screen.

3.10.2.1 INDEX FIELD CHANGE ACTIONS DEFINITION.

When a user Changes/Updates a Document Index Field within Dart EDM, a script is executed that will perform one of the following:-

- Audit - Save the Old / New values of the field including the User name, Time of change/update to an Audit File.
- MoveFolder When this field is changed/updated, the document is moved from its original location to a newly specified location.

- **RenameFolder** When this field is changed/updated, the document is renamed from its original name to a newly specified name.

3.10.2.2 INDEX FIELD CHANGE ACTIONS FIELD DEFINITION.

Index Field Change Actions		
Index	***Select Index***	
Index Meta List	***Select Index***	
Index Meta Change Action	Audit	
AIM	DocumentType	Audit
AIM	DocumentType	CreateXMLFile

Figure 25 : Index Filed Change Actions Screen.

3.10.3.1 FIELD CHANGE ACTIONS DEFINITION.

Use this section of Solution Configuration to configure the ACTIONS that will occur during the Index Field Change Action.

3.10.3.2 FIELD CHANGE ACTIONS FIELD DEFINITION.

Field Change Actions Config	
Index Meta Change Action	Audit

Not configurable

Figure 26 : Field Change Actions Configuration Screen.

3.10.4.1 LINKS CONFIGURATION DEFINITION.

Using the **links Configuration** you can switch on the option to have the:-

- **Folder Archiving.**
- **Barcode Creator.**

Display in the **Actions** list by checking the appropriate check boxes.

If you do not want the options to be displayed, then un-check the options and they will not appear in the **Actions** list.

Please Note - If you are signed in as an administrator, then these changes will not take effect, and you will always see the options. However, any non-administrator will be affected, depending on which options you have chosen.

3.10.4.2 LINKS CONFIGURATION FIELD DEFINITION.

Links Configuration	
Folder Archiving	☒
Barcode Creator	☒

Figure 27 : Links Configuration Screen.

❖Folder Archiving:-

- Description : If you would like the user to see this option available in the **Action** list, then check the box.
- Type : Check Box.

❖Barcode Creator:-

- Description : If you would like the user to see this option available in the **Action** list, then check the box.
- Type : Check Box.

3.10.4.3 INDEX FIELD CHANGE ACTIONS ADD PROCEDURE

ACTION	RESPONSE
1. From the Home screen, select Configuration icon.	↙ The System Configuration screen is displayed.
2. From the Actions list, select Solution Config.	↙ The Solution Management screen is displayed.
3. Using the “+” symbol, expand Links Configuration.	➔ ↙ The Links Configuration section is expanded.
4. Using the check boxes, select the options that you would like displayed in the Actions list.	↙
5. Click the Save/Update button.	➔ Message:- ↙ 
6. Finished.	

Footnotes:-

3.10.5.1 META OBJECTS DEFINITION

Definition Required.

3.10.5.2 META OBJECTS FIELD DEFINITION.



Figure 28 : Meta Objects Screen.

3.10.6.1 META FUNCTIONS CONFIGURATION DEFINITION.

This functionality is still under development.

3.10.6.2 META FUNCTIONS CONFIG FIELD DEFINITION.



Figure 29 : Meta Functions Configuration Screen.

3.10.7.1 ACTIVE DIRECTORY CONFIGURATION DEFINITION.

With **Active Directory Configuration**, the Dart EDM user can log into the system using their Microsoft Windows Username/Password.

In order for this facility to work, you must first activate **Active Directory (AD)** and configure the system with each Domain Name that exists within your Microsoft Server. When you create the users credentials (see User Management), the Username/Password must match with Microsoft Windows and the Authentication field must be set to the correct Domain Name.

3.10.7.2 ACTIVE DIRECTORY CONFIG FIELD DEFINITION.

Figure 30 : Active Directory Screen.

❖Enable Windows AD:-

- Description : If you would like to add the Domain specified in the **Domain List** box, then you will check this box.
- Type : Check Box

❖Domain List:-

- Description : Select the Domain from the list available.
- Type : Drop Down Selection.

❖Domain Name:-

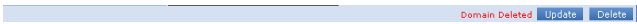
- Description : Enter the name of the Domain that you would like to add to the Dart EDM system.
- Type : Input Box.
- Information Type : Alphabetic and Numeric characters
- Minimum Length : 1
- Maximum Length : 60

3.10.7.3 ACTIVE DIRECTORY CONFIG UPDATE PROCEDURE

ACTION	RESPONSE
1. From the Home screen, select the Configuration icon.	→ ↙ The System Configuration screen is displayed.
2. From the Actions list, select Solution Config.	→ ↙ The Solution Management screen is displayed.
3. Using the “+” symbol, expand Links Configuration.	→ ↙ The Active Directory Config screen is expanded.
4. Using the Domain List , select the Domain Name that you would like to update.	↙
5. Click the Update button.	→ ↙ Message:- AD updated successfully Update Delete
6. Finished.	

Footnotes:-

3.10.7.4 ACTIVE DIRECTORY CONFIG DELETE PROCEDURE

ACTION	RESPONSE
1. From the Home screen, select the Configuration icon.	→ The System Configuration screen is displayed. ↩
2. From the Actions list, select Solution Config.	→ The Solution Management screen is displayed. ↩
3. Using the “+” symbol, expand Links Configuration.	→ The Active Directory Config screen is expanded. ↩
4. Using the Domain List , select the Domain Name that you would like to delete.	↩
5. Click the Update button.	→ Message:- ↩ 
6. Finished.	

Footnotes:-

3.10.7.5 ACTIVE DIRECTORY CONFIG ADD DOMAIN PROCEDURE

ACTION	RESPONSE
1. From the Home screen, select the Configuration icon.	→ The System Configuration screen is displayed. ↩
2. From the Actions list, select Solution Config.	→ The Solution Management screen is displayed. ↩
3. Using the “+” symbol, expand Links Configuration.	→ The Active Directory Config screen is expanded. ↩
4. Using the Add New Domain section, enter the name of the Domain Name in the box provided.	↩
5. Click the Add Domain button.	→ Message:- ↩ 
6. Finished.	

Footnotes:-

▶	16, 19
▶▶	16, 19, 20
Access Logs	24, 31
Administrator User	24, 31
AIM Enabled User	30
Apply permissions to all child folders	19
Apply to Child Folders	41
Archive	19
Archive Path	9
Authentication	30
Available	13
Barcode Text	39
Can be Archived	41
Confirm New Password	38
Create	18
Create Document Indexes	23, 30
Delete	18
Deny Access	19
Description	23, 30
Destination Group	16
Document Index	7, 29
Document Index Name	34, 35
Document Store Path	8
Domain List	45
Domain Name	45
Email Address	29
E-mail Server Name	10
Enable	8
Enable Global Lock	12
Enable Windows AD	45
First Name	28
Group Name	13, 23
Home Page	7, 29
Index	43

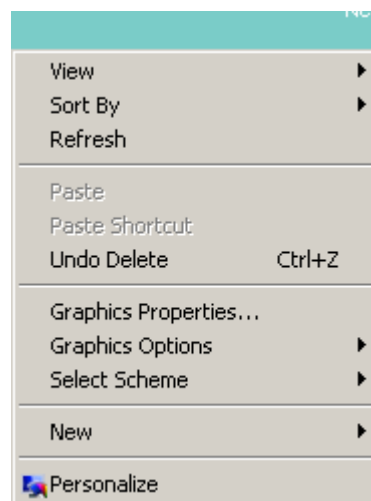
Is archived	41
Last Name	28
Licence Key	10
Licenses	13
Licensing Group	30, 37
Manage File Permissions:-	24, 31
Manage Groups	24, 31
Mark for archive	41
Move	19
New Document Index Name	36
New Password	38
Old Password	38
Password	29
Password Expiry	11
Quantity	39
Re-cycle	19
Region	23
Re-Name	18
Reserved License User	30
Re-Type Password	29
Rollback Checkouts	24, 31
Select theme	6
Session Time	11
Show Archived Folders	9
Source Group	16
Top Text	39
Total	13
User Name	29
Users in Selected Group	13
Users Limit	10
Users Logged On	11
View Documents	18
Write (Check Out/In)	19

ADDING A DART EDM SHORT-CUT TO YOUR DESKTOP

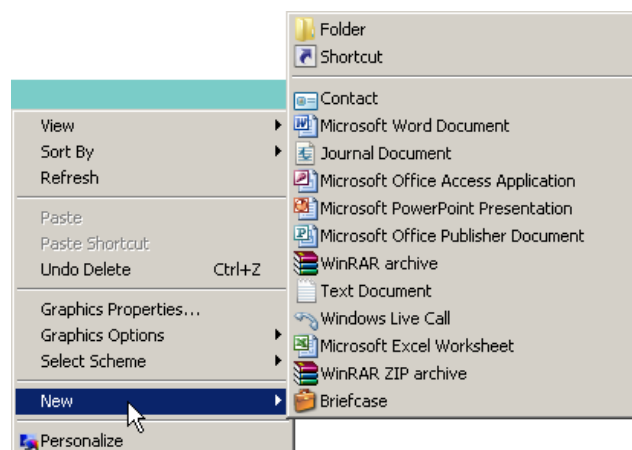
ACTION

RESPONSE

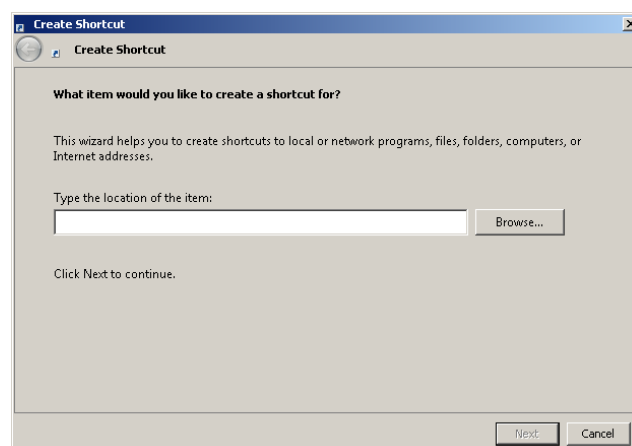
1. Using the Mouse, Right Click anywhere on the Desktop that has space.



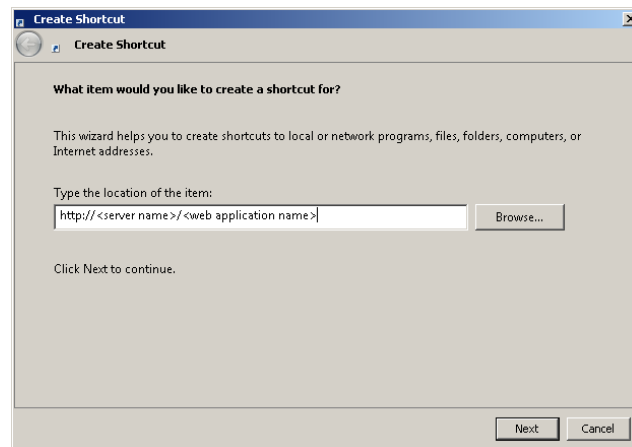
2. Place the Mouse pointer over New.



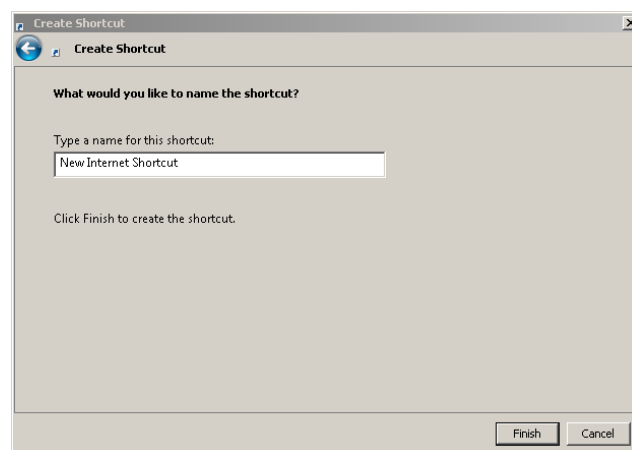
3. Place the Mouse Pointer over Shortcut.



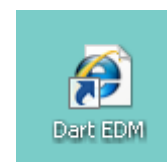
4. Using **Type the location of the item**, enter the **URL address (see fig)** for Dart EDM, and click the **Next** button. If you are unsure of what to type in the box, refer to your local Dart EDM Administrator.



5. Using the **Type a name for this shortcut**, Enter **“Dart EDM”** and click the **Finish** button.



6. A new shortcut will appear on your Desktop screen.



7. Finished.

Footnotes:-