Quick Start Guide

Document Management - KRYSTAL DMS – All Editions

Table of Contents

Document Management

Welcome to KRYSTAL Document Management System, the most advanced and versatile Document Management System Software. Over 17 years, Primeleaf Consulting (P) Ltd created KRYSTAL DMS as a most comprehensive and easy to user Document Management Software System.

KRYSTAL DMS reflects the suggestions and ideas from faithful users, advancing technology and our commitment to finding new ways to organize and secure your enterprise content, knowledge and document repositories.

This Quick Start Guide is intended to guide you through the process of defining a document class for storing, retrieving documents and enable access control to implement the same so that you can start using them easily and immediately.

Thank you for taking a look at KRYSTAL DMS!

Introduction to Document Management in KRYSTAL DMS

KRYSTAL DMS delivers simple and quick access to the documents by eradicating chaotic folder structure. Before using KRYSTAL DMS, you need to identify what categories of documents are to be stored and then create Document Classes accordingly.

Document Classes are nothing but a group of similar documents. Document which are similar in its functional capabilities are grouped under a document class.

For example, Invoices, Purchase Orders, Shipping Confirmations etc.

Administrators can create any number of document classes using this module. Each document class can contain any number of meta-data indexes.

In this Quick Start Guide, let us consider an example where you have to store **Purchase Orders**.
So PO would be our Document Class.

Next comes indexes, Indexes are the meta-data fields which are used to classify and distinguish documents on basis of their functional requirements.

Indexes can be any one of the following data types:

- **String:** free text strings can be used to describe meta-data fields, such as title, subject, etc.
- **Date:** the field value must be a valid calendar date.
- **Number:** the field value must be a digital number.
- **Auto generated:** the automatically generated value.
- **List:** list of static values.

Now for **Purchase Orders**, the possible meta data fields which will uniquely identify a single PO document, would be **PO Number, PO Date, Vendor Name and Product Details**.

PO Number would be of type Number.

PO Date would be of type Date field.

Vendor Name can be of type String or List.

Product Details would be of type String.

After deciding the Document Class and its Indexes, we need to specify the access for the document class.

We can assign permission to the individual user or we can add users with same permissions to a group. Giving permission to individual user becomes a bit tedious to manage, so we suggest rather than giving permissions to the individual, add the users having similar permissions in one group and then assign permissions to the group.

Let us consider we have two groups, Accounts Executive and Accounts Manager.

After creating groups, we need to create ACL (Access Control List) Template.
ACL (Access Control List) Template is used to provide permissions/rights for public, users, groups and roles.

Once the document class and groups are defined in the system we can create an ACL template to assign permissions.

In our example, we will create an ACL template named Accounts_Department_Permissions.

After creating ACL, we will assign permissions to the user/groups.

Suppose, Accounts Executive has permissions to create, read and edit the indexes of the document whereas Accounts Manager has permissions to read, edit, share as well as delete the document.

Following Step-by-Step Guide along with the screenshots will help you implement the discussed example.

Create Document Class

Document Class management tasks can be performed using Manage Document Class module of Control Panel.

You can use Control Panel -> Manage Document Classes -> New Document Class option available in the system to create a new document class.

As discussed we will create document class named **PO (Purchase Orders)**

Create Indexes

You can use Control Panel -> Manage Indexes -> New Index option to create all the required indexes.

For eg. PO Number, PO Date, etc.

Assign Indexes to Document Class

Next Step is to assign the indexes we created, to the Document Class. You can perform this activity by using:

Control Panel -> Manage Document Classes -> Manage Indexes

To add an index, you can select the index from the Index Name drop down.

Referring to our example, we need to assign all the created indexes i.e. **PO Number, PO Date, etc**. to the **Purchase Orders** class.
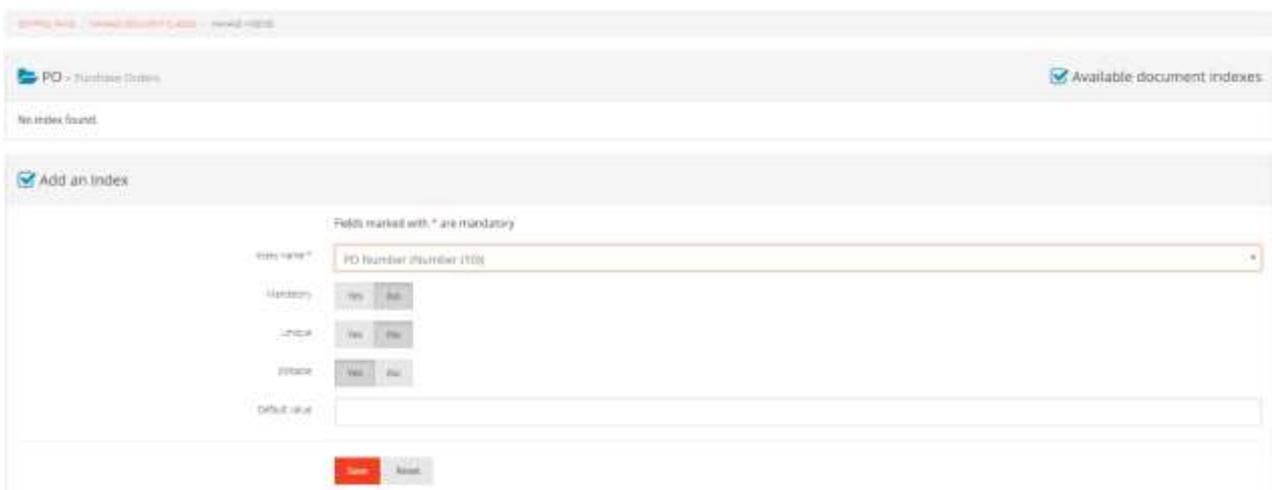
Create Groups

You can create groups of one or more users having similar access permission using

Control Panel -> Manage Groups -> New Group
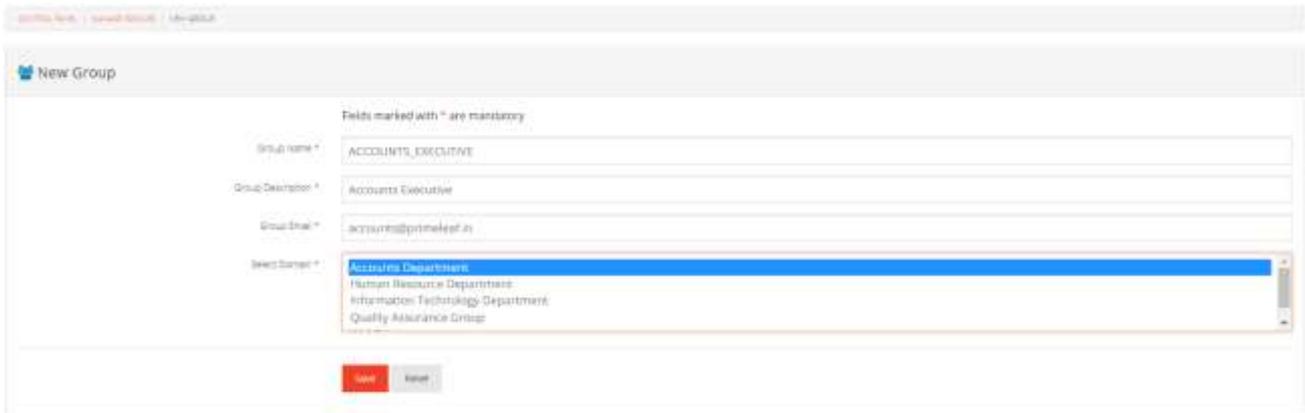
Assign Group to User

Use following options to assign one or more groups to the user

Control Panel -> Manage Users -> Edit User

Select the groups applicable to the user.

Create ACL Template

To add a new ACL Template, you can use

Control Panel -> Manage ACL Templates -> New ACL Template option can be used for the same as shown below.
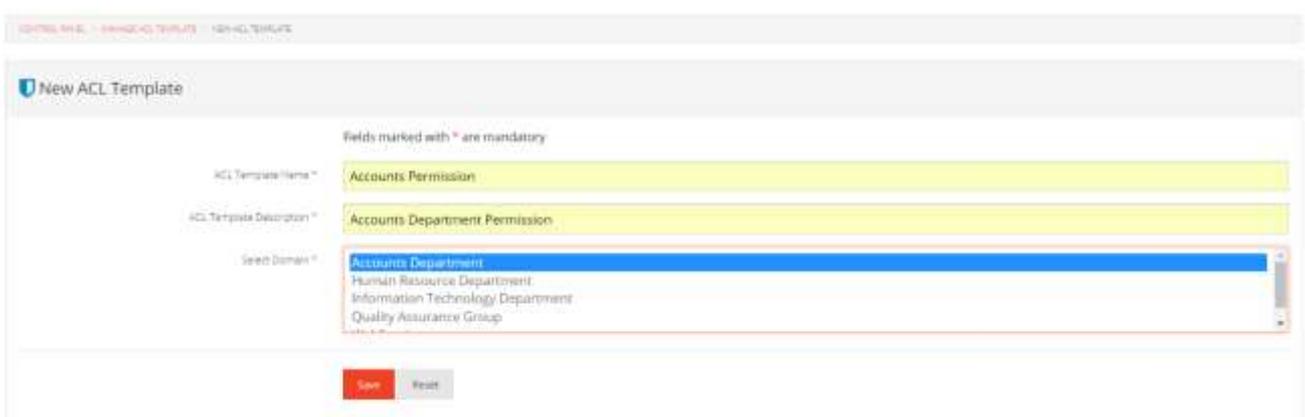
Assign Permissions

Now you can assign permissions to groups/users for the document class (Purchase Orders). Use following option for the same.

Control Panel -> Manage ACL Template -> Manage Permissions (Associated with ACL Template)

Choose group/user and assign permission which you desire.
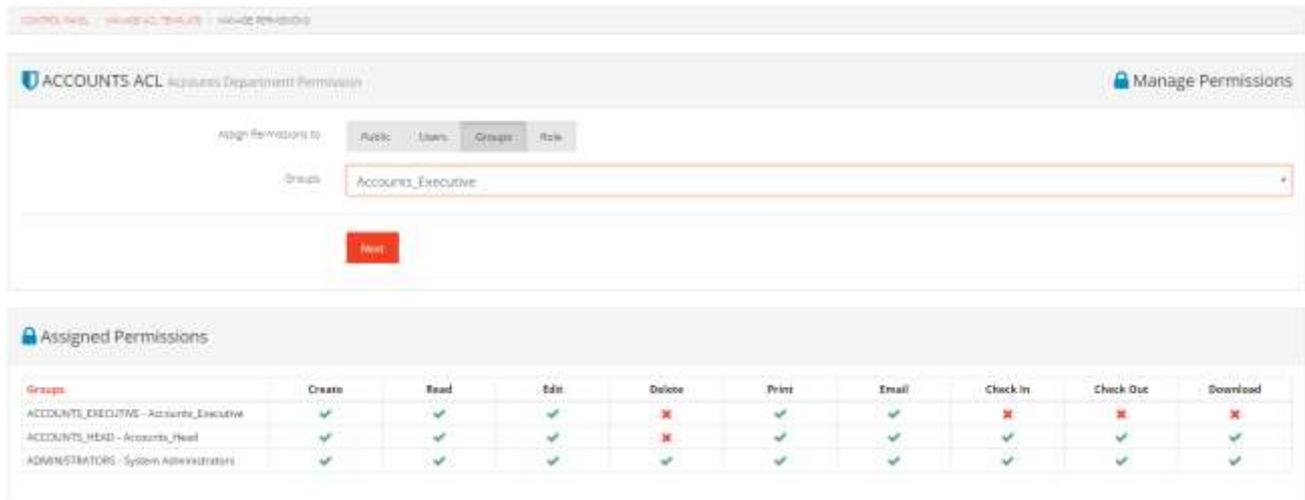
Assign ACL Template to Document Class

Next step is to assign this ACL Template to Document Class. You can perform this activity by using Tabl

Control Panel -> Manage Document Classes -> Edit (Associated with Document Class)

Select the ACL Template and Domains for this Document Class and save changes.

WE HOPE THIS QUICK START HAS BEEN HELPFUL IN SHOWING YOU HOW TO GET STARTED USING KRYSTAL DMS –DOCUMENT MANAGEMENT QUICKLY AND EASILY. FOR MORE DETAILED INFORMATION ON HOW TO USE KRYSTAL DMS FOR MANAGING YOUR DOCUMENTS, PLEASE SEE THE KRYSTAL DMS – ENTERPRISE EDITION USER GUIDE AND ADMINISTRATOR GUIDE, BOTH OF WHICH ARE ACCESSIBLE VIA THE KRYSTAL DMS HELP MENU**.**