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Sign Up

You can sign up through the Login page, by clicking on Sign Up.

Click on sign up to open a detail form where you can will fill detail as shown below:
You will receive an email "Sign up Verification", to verify your login click on verify.
Once you verify, you will be able to log into Greenbox.
System Login Through Invite

You can invite other team members.
Click on your name as mentioned below.

Once you click you will be directed to My Profile page.
Click on "Manage Users".

By clicking this you will have the feature to invite the users. Click on that button, as shown in below screenshot.
When you click on Invite Users you will get the option of sending invites to multiple users. You can also select the Site & Roles along with the descriptions.
Once you click on Submit users will receive email with a link to register.

They will be redirected to the portal registration page. Provide further details and click on the Save button (refer below screenshot).

Once done, the user needs to go to the portal's Login Page (https://greenbox.discus.solutions) like shown below.
They will be able to login using their login credentials.

*Note: Username will be registered email address and password will be the one provided by the user at the time of signup/registration.*
Left Panel

In the left panel you will see the following tabs:

My Box

➢ All the boxes/folders and documents that you create will be seen in the ‘My Box’ section.
➢ It shows shows boxes and documents that are owned/created by you in Greenbox

Shared

➢ This section shows all the boxes/folders and documents which are shared with you by other users.
➢ You might have different permissions on these boxes and documents depending on the permission given by the owner of the boxes and documents.

Favorite

You can mark boxes and documents are favorite and they will appear in your Favorite section.
➢ This option will be available in the left navigation menu below ‘Shared’ where you will be able to see all the box/files that are marked as favourite by him/her.
➢ This section will act like shortcuts to the user for their most accessible document/box.

Recent
This section shows the recent documents that you have accessed.
➢ This option will be available in the left navigation menu below ‘Favourite’ where you will be able to see all recently accessed box/file by you.
**Bin**

This section will show the documents that you have removed from your Greenbox.

➢ This feature will act like a Recycle bin, so whenever you delete/remove a file or document these documents will go into the Bin section from where the user will have the option to perform Permanent delete.

➢ Whenever you permanently delete then that file or document will get deleted from the entire Greenbox.

**Global Search**

- You can search for any document using filename, content of the document using the global search. If you are on the dashboard, it will search through all the folder on the dashboard only.
- It will be visible on every page of the system.

**Types of Search**

**Wildcard Search**

This helps you to search single & multiple character wildcard searches within single terms. wildcard characters can be applied to single terms, but not to search phrases.

Single Character (Matches a single character)
Special character:  ?
Example: The search string te?t, would match both test and text.

Multiple characters (matches zero or more sequential characters)
Special character:  *
Example: The wildcard search: tes* would match test, testing, and tester.

You can also use wildcard characters in the middle of a term.

For example: te*t would match test and text. *est would match pest and test
Fuzzy Search

Fuzzy searches discover terms that are similar to a specified term without necessarily being an exact match.

To perform a fuzzy search, use the tilde ~ symbol at the end of a single-word term. For example, to search for a term similar in spelling to "roam," use the fuzzy search:

Roam~
(This search will match terms like roams, foam, & foams. It will also match the word "roam" itself.)

Proximity search

A proximity search looks for terms that are within a specific distance from one another. To perform a proximity search, add the tilde character ~ and a numeric value to the end of a search phrase.

For example, to search for a "apache" and "jakarta" within 10 words of each other in a document, use the search:

"jakarta apache"~10

The distance referred to here is the number of term movements needed to match the phrase.

In the example above, if "apache" and "jakarta" were 10 spaces apart in a field, but "apache" appeared before "jakarta", more than 10 term movements would be required to move the terms together and position "apache" to the right of "jakarta" with space in between.

Boosting a Term with ^

With a boost factor (a number) at the end of the term you are searching. The higher the boost factor, the more relevant the term will be.

For example, if you are searching for

"jakarta apache" and you want the term "jakarta" to be more relevant, you can boost it by adding the ^ symbol along with the boost factor immediately after the term.

For example, you could type: jakarta^4 apache

Boolean operators

Boolean operators allow terms to be combined through logic operators. Lucene supports AND, “+”, OR, NOT and “-” as Boolean operators.

a. OR operator: The OR operator links two terms and finds a matching document if either of the terms exist in a document. Example: "jakarta apache" OR jakarta.
b. + operator: requires that the term after the + symbol exist somewhere in a field in at least one document in order for the query to return a match.
   Example: For example, to search for documents that must contain "jakarta" and that may or may not contain "lucene," use the following query:
   +jakarta lucene

c. And (&&) operator: The AND operator matches documents where both terms exist anywhere in the text of a single document.
   Example: "jakarta apache" AND "Apache Lucene"

d. NOT operator: The NOT operator excludes documents that contain the term after NOT
   Example: "jakarta apache" NOT "Apache Lucene"

e. Boolean operator: The - symbol or "prohibit" operator excludes documents that contain the term after the - symbol.
   For example, to search for documents that contain "jakarta apache" but not "Apache Lucene," use the following query:

   "jakarta apache" -"Apache Lucene"

**Specifying date and time**

Queries against fields using the TrieDateField type (typically range queries) should use the appropriate date syntax:

- timestamp:*[ TO NOW]*
- createdate:[1976-03-06T23:59:59.999Z TO *]
- createdate:[1995-12-31T23:59:59.999Z TO 2007-03-06T00:00:00Z]
- pubdate:[NOW-1YEAR/DAY TO NOW/DAY+1DAY]

**Notification**

- You will get two types of notification from Greenbox
  - Email Notification on registered email address
  - Bell notification (Top right corner, 'Bell' icon)
Create Boxes and Upload Document

On login, you will see your 'My Box' section.

Create new Box

Click on the 'Create New Box' in your 'My Box' section.

Enter the name of Box you want to create and press enter.
How to upload folder or documents in the Box

Click on the ‘Upload Files’ icon and you will see 2 options

- **Choose Box**
  - If you would like to upload an entire folder, click on the ‘Choose Box’ option.

- **Choose File**
  - If you would like to upload files, click on the ‘Choose Files’ option

- **Drag and Drop option**
  - You can upload files and folders through drag and drop from your system to Greenbox.

*There will be limit on the size of the folder/document that can be uploaded in Greenbox*

**List View**

- You can arrange the ‘Box’ in list or grid view using ‘List/Grid’ view
Grid View:

My Box

Boxes

- Raw Material
- Finance Department
- HR Department

List View:

My Box

<table>
<thead>
<tr>
<th>Box Name</th>
<th>Created Date</th>
<th>User</th>
</tr>
</thead>
<tbody>
<tr>
<td>Raw Material</td>
<td>Apr 29, 2020</td>
<td>Rahul Singh</td>
</tr>
<tr>
<td>Finance Department</td>
<td>Apr 29, 2020</td>
<td>Rahul Singh</td>
</tr>
<tr>
<td>HR Department</td>
<td>Apr 29, 2020</td>
<td>Rahul Singh</td>
</tr>
</tbody>
</table>
Other Actions
Actions available on selection of more than one document or Box

Following options will be available when user selects single/multiple specific box/file:

- **Remove**
  - You will be able to remove the Box or document from your My Box. If required they can be recovered from 'Bin'.

- **Download**
  - You will be able to download the entire Box or File in zip format.
  - However, users must have permission to do the same. If download permission is not allocated to the user then this action icon will not be visible.

- **Download as Stitch File**
  - When multiple files are selected this option will be visible to the user.
  - Through this user will be able to download multiple files of ‘same type/format’ in a stitched format i.e. multiple files will be downloaded into a single file with each merged into the sequence selected.
Folder / Document Activity List

When you right click on the selected box/document, it will show a list of activity the user can perform on the box/document.

- **Preview**
  - This option will be available only for individual files.
  - User will right click the file or document the user will see a preview of the file.
• **Share**
  ➢ You will be able to share the document. You will be prompted to select users with whom you want to share the document.
  ➢ You can also enter any comments for the other user to share some points/information on the shared file/box.
  ➢ You can assign specific action to be carried out by the recipient.

Permissions while Internal share

- **Download Special**: You will be able to download the file with any specific watermark or impression.
- **Start Workflow**: User will be able to start workflow from the document itself.
- **Copy**: While sharing a document/file internally users can give permission to copy a box/file.
- **Download/Print**: You can also give permission to other users for download and print the file/document.
- **External Share**: You can give permission to allow the other user to externally share the file/document which is not registered to greenbox.
- **Rename**: Following permission will allow the shared user to rename the shared box/document.
- **Share**: You can also give permission to internally share the box/document to the other user.
● **External Share**

External Share: With this option you can allow the files to share other than greenbox externally.

- This feature will allow the user to share the file/document to non-greenbox users easily.
- When you will click on it a prompt box will appear as shown below:

![External Share Prompt Box](image)

➢ An External share link of the file/box will get generated automatically.
➢ You will have an option to enter a valid email id, to whom you wish to share the access/link to file/documents.
➢ You can also set ‘Expiry date and time’ before sharing the link. The shared file will get expired on that defined date & time.
➢ You can also give the permission to the recipient of download or print the file/document shared.
➢ Once all the necessary details are filled click on save.
- **Rename**
  - You can rename the file or box with this feature.

- **Download**
  - When you click the selected file/document will automatically get downloaded to the system.

- **Start Workflow**
  - You can also start any workflow any document, when you click on the start workflow and it will show the below screen

  ![Start Workflow](image)

  - You have to select the application to initiate the workflow process.
  - Select the process and then from different processes.
➢ Another screen will pop-up from where you can initiate the process by filling in all the details and then click on the save.
➢ The subsequent steps of the workflow will be followed as defined in the workflow

- **Download Special**

You can download the document by attaching a watermark or any image attached to it.
➢ You can select the impression to attach with the document and start the counter.
➢ The counter will automatically increment on each instance of download
➢ You can also preview the final document before finally downloading it.

● Copy To

➢ You can copy files or document & make a copy by selecting the Green Box folder / box.
  I.e. A copy button will be there at the end to perform the action.
➢ You also have the option to cancel the copy action.

➢ You can view, beside the ‘Copy’ tab an option to ‘create new Box’ you can create a new box and copy the file/document copied there directly.

● Move To

➢ You can move the files to other folders when clicked on “Move To” to other location.
➢ After selecting the location user will have option to command move action. I.e. A ‘Move’ button will be there at the end to perform the action.
➢ You also also have the option to cancel the Move action.
➢ You can view, beside the ‘Copy’ tab an option to ‘create new Box’ you can create a new box and move the file to a new file/document.
• **Remove**
  - You can remove or delete the file/box from Greenbox.
  - When you click the Remove tab, you will be asked for confirmation of the action. You will get two options - 'Delete' and 'Cancel'.
  - If you click the 'Delete' option then the document will be removed and be transferred to the Bin section. If cancel is clicked then the confirmation box will disappear.

![Remove Tab](image)

• **Add to Favorite**
  - This feature is used to add the entity to favorites list in the Greenbox, from which you can access files/folders easily. You can also click the * Add to Favourite.

![Add to Favorite](image)

• **View Details**
  - You can view the “View Details” popup from right side and all the relevant details regarding the documents will be shown in a section of - 'Details, Form and Activity.'
Details

Standard Details

Here you can see details of Box/File like Current Version, Modified Date, Created Date, Size, Location and the status of OCR.

Labels(Tag)

➢ You can add/specify Label(Tag). The label specified or added/tagged will be mainly used for easily searching the document or file/box in the Greenbox.
➢ For e.g if you type ‘Finance’ in the search box, then all the documents with the name will be displayed in the results.
➢ If any label/tag is already assigned to the particular file/doc then those will appear under the Label section whenever the user navigates to Detail.

![Labels and Details section](image)

➢ You can edit the tags by clicking on the Label option in the list.
Impressions

➢ You can click on "Add impression"

Once you click on impression it will show a screen, click on the create impression to add impression
Select the impression type you want to attach with the documents and save.

**Reminders**

- You can be able to set Reminder. This feature will only be for (file) documents.
- You can add Subject of Reminder which will denote the purpose and add multiple participants to whom the reminder will be sent.
- Also there will be an option to mark the frequency, date and time of the reminder to concerned people to perform necessary actions.
- Here, for reminder an email notification will be sent to the concerned people at the stipulated date, time and frequency.
Comment

➢ You can enter a comment under the ‘Comment’ section where all the permitted user can add comments for the specific file(document) shared.
➢ When you click on Comment, a text area will open to enter comments. You will be able to see the comments added by you or by other users with date and user name.
➢ These sections will be available only for file(document).
➢ By default you will see three recent comments.
<table>
<thead>
<tr>
<th>Size</th>
<th>807.35 Kb (826,729 bytes)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Location</td>
<td>Abin Personal Site</td>
</tr>
<tr>
<td>OCR Result</td>
<td>Done</td>
</tr>
</tbody>
</table>

### Labels

### Reminders

- Add Reminders

### Comments

Please verify this

Read less..

Abin Pathank On Mar 25, 2020

Add Comments

[Save] [Cancel]
Workflow

You can start workflow on any document by clicking on the start workflow.
Advanced

➢ In the Advance section, you can apply features to the file (document).
➢ When you click on ‘Advance’ the section will expand with two options - 1. Doc Type and 2. Manage version.
Document Type

This feature will be mainly used to identify a certain set of documents from all the documents.

**Use-case:** An organisation is maintaining documents of mainly two departments - HR, Finance. The organisation would like to organise documents with a separator which will identify that this pile of documents belongs to the HR department and this to Finance. i.e. a way to identify they type of document.

![Select Doc type & click on save]

Creating Dynamic Form

➢ From here authorized user will be able to create and manage Dynamic Form in the system.
➢ You have to fill the dynamic form for successful upload of documents in the system.
➢ Details added in dynamic form becomes the metadata of the document and user will be allowed to global search this metadata as well.
Page level permission

➢ You will be give page level permission to other users for a multiple page pdf document
  ○ Document will be show page wise on the screen
  ○ Select the page for which you want to give permissions to the user
  ○ Select the user to whom you would like to give permission
  ○ After giving the permission the users will be able to see only those pages for which you have given them the permissions

Manage Version

➢ You will be able to manage different versions of the same document.
➢ At a time only one document will be active and accessible to all the people with whom the document is shared.
➢ You can also have the option to restore the previous version as the currently active version.
➢ For each version there will be the date and name of the person who uploaded it.
➢ When you click on Manage Version a box will open where you can enter necessary details and maintain the version.
➢ This feature and the option of viewing/restoring/downloading the version will be permission based.
➢ Once the new version is uploaded, all users having document’s access, will view the latest version. An automatic version maintenance of the file will be carried out.
➢ For accessing older versions, ‘View all versions’ will be there in permissions while sharing a document. So only the authorised person will see various versions of the document.
Split Document

➢ In Greenbox you can split ‘Pdf’ type documents. You will see this option of ‘Split pdf’ in ‘Advance’ in view details only if the file/document is of pdf type.

➢ To split a pdf file you shall first navigate to detail page shown in right side of a file as shown below:

In the detail section of a file user shall first click on ‘Advance’ which shall open up few advanced features. Then click on ‘Split pdf’ option from the menu.

As soon as the user clicks on ‘Split pdf’ a pop-up as shown below appears.
Step 1: You'll have to select the page which is to be carried to the new split file.
Step 2: Click on Split Document button.

After step 2 you have to fill details as shown below:

➢ Now you have to enter the name of the new document that is created after splitting the file.
➢ In ‘Document Pages’ you can see the page number of files that are selected for splitting.
On submission of details a new split document is created and saved with the new name given in the section.

* If a user performs this action in 'My box' then it will be saved in 'My box'.

**Form**

- In the right panel of a file/box beside detail there will be a section with title ‘Form’, which will display the form if any.
- Here, forms will be displayed on the basis of the Document Type. If the selected document have any dynamic form attached then those forms will be visible here.

**Activity**

- Beside the form section there is ‘Activity’ section which will show all the activity performed on the File/Box in sequence with the latest one up.
- This is kinda personal Audit Trail of the file (document)/box, through which the user can pick into all the activities that were performed on this file/box by him/her or anyone else with whom this file/box is shared and access given.
- By default it will show activity that holds on the page to see rest user will click on ‘Show more’ option.
Settings

Settings Menu can be found by clicking on user name as shown below:

Audit Trail

This section shows a detailed activity trail of users in the system.

- All the actions performed in the system will be recorded here in human readable format so that even a normal authorized user will be able to read and understand.
- By default you can view 100 records.
➢ You can select start date, time and end date, time, number of rows to be viewed at a time and hit the search button to see the result.
➢ You can also perform an advanced search and export the rendered details in excel format.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Time</th>
<th>End Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>dd MMM yyyy</td>
<td></td>
<td>dd MMM yyyy</td>
<td></td>
</tr>
</tbody>
</table>

Rows: 100

- **Doc Type**
  You can create a doc type and allocate it to a file, for easy accessibility in future.
  You can also create a dynamic form, needs to be filled whenever a file/folder is uploaded in the system.

- **Create Type (Doctype)** - You needs to follow below mentioned steps to create a new doc type:

  1. Click on user name
  2. Click on Dynamic Form
  3. Click on Create Type
  4. Click on Assign Form
● Click on +Create Type button (refer above screenshot)
● Provide the Type Name as shown in below screenshot
● Click on Save button as shown in above screenshot
● Once clicked, new Doc type will be created in System (refer below screenshot)

Create Dynamic Form - You need to follow below mentioned steps to create a new Dynamic Form:

● Click on +Dynamic Form, as shown below

● Select Create New Form, as shown below
- Provide Name of form (refer screenshot)

- Provide field names and select its type, as shown above. In case, you wants to add new field, click on **Add New Element** (as marked in above screenshot)
- Once fields are assigned, can click on the **Save** button, and a new form will be added.(as shown below)
Assign Form - To assign a form to a particular doc type, follow the below mentioned steps:

- Click on **Assign Form** button, as shown in the below screenshot.

- Select the already created Doc types and form from the dropdown list (refer below screenshot).

- Once done, click on **Save** button as marked in the above screenshot.
Roles Permission

➢ This option will be available to you under the menu below..
➢ Here you will be able to create different Roles into the system and assign them to multiple people along with the required permission.
➢ In Listing authorized user will see details like given Role Name, Created date and created by along with status.

➢ To add new role you have to click on ‘Add New Role’ button which will navigate user to the page as shown below:

➢ You can ‘Edit’ the roles & permissions & save the details.
➢ To ‘Map users’ you have to click on the ‘Map User’ button, select required users and submit the details.
In the permission section you will see different permissions defined where you can check/uncheck required permission and submit to be applied on all the users mapped in particular roles.

Permissions as follows:

- **Create Box**: Allows user to create/upload box.
- **Create Sub-box**: Allows users to create/upload sub-box.
- **Manage Role Permission**: Allows users to view and manage ‘Roles & Permission’ section.
- **Manage Site Permission**: Allows users to view and manage ‘Site Permission’.
- **Manage Doc Type**: Allows users to view and manage ‘Doc Type’.
- **Box/Document Share**: Allows users to share box/document(file) internally.
- **Bulk Permission**: Allows users to view and manage ‘Bulk Permission’.
- **My Box**: Allows users to view and manage ‘My Box’ section. If this permission is unchecked then the user will land automatically to ‘Shared’ section and to ‘My Box’.
- **Intermediate version View**: Allows users to view intermediate versions of documents/files(i.e. the documents that are not approved in the workflow) followed through ‘Kriya’ product.
- **Final Version View**: Allows users to view Final version of documents/files(i.e. the documents that are approved in the workflow) followed through ‘Kriya’ product.
- **Integrated User**: Marks the mapped user as Integrated users between Kriya and Green Box product.
- **Edit**: Allows user to edit files in Google Doc and Microsoft Office.
- **Delete**: Allows the user to delete a file/box from ‘My Box’.
- **Permanent Delete**: Allows user to permanently delete file/box from ‘Bin’.
- **Audit Trail**: Allows user to view the audit trail. Users with this permission will be able to see the Audit Trail of every other user mapped in the same site along with client admin and admin activities.

**Bulk Permission**

- This option will be available to authenticated users in the menu below ‘Role Permission’. From here you will be able to manage permission for multiple users at one go and also transfer ownership of the box and files.
- In Bulk Permission there will be two section as shown below:
  - Permission Update
  - Transfer Ownership

**Permission Update**
Note: Data will be visible in the listing table on the basis of the filters applied. Data will be visible only after filters are applied, no pre-feed data in listing.

**Search By:** User shall select whether the user wants to search by ‘File’ or ‘Folder’ based on this selection content in the table below changes. This is a mandatory field.

**Filter By:** You also have the option to filter data based on ‘Created Date’ or ‘Modified date’ and select the date range for the same.

‘Select Box’ and ‘Select File’: You can select the particular box and file on which the user wants to perform necessary action. Box and file in this list will be off throughout the system irrespective to date range and filter selected in ‘Filter By’ field.

**Select User:** You can also select the particular user on whose file/box action has to be performed. This list will also be of throughout the system irrespective to date range and filter selected in ‘Filter By’ field.

After appropriate selection, the user will have to click the ‘Submit’ button to view results in the table below. Reset button to reset the filters applied.

1) **File Name:** Shows the name of file.
2) **Folder Name**: Shows the name of the folder in which the particular file is.
3) **File Owner**: Shows the name of the owner of the file.
4) **Shared User**: Shows the name of the users with whom the file is shared.
5) **Action**: Here you can lock/unlock any file as well as delete the file and restore it from the bin.

You can select multiple files to perform activity through the check box.

**Edit Permission**

Edit Permission will get enabled only when you select any file/box. You can select multiple box/files and clicks on ‘Edit permission’ button than the edit permission screen as under will open.

Here you can select users whose permission is to be updated in ‘Select User’ field then select the permission and save.

**Transfer Ownership**
As the title says this space is used to transfer ownership of documents at one go.
This feature will be generally used when you or another user leaves an organization and all the
documents of the particular user are to be transferred to another user.

Here authorised user will select a particular user whose documents are to be transferred to another user
in ‘Current User’ field.

Then select the new user to whom the documents are to be transferred and click the Transfer button.
That’s it ownership of files/box is transferred.

Manage Impressions

You can view compression types summary.
You can create impressions on Text fields or on images.
➢ While using impressions on Text fields user have to give the Watermark name.
➢ Whereas for image user has to upload a pic from the system.

For Text Field
➢ ‘X’ & ‘Y’ Position: This acts as a X & Y axis on the image & watermark text field.
Counter: Counter works to track or audit the download as it downloads with number of impressions. Here the user has to give counter prefix.

Site Level Settings

Here you can give or remove site level permissions to other users & also can make the changes in configurations.

Also you can Reset the permissions.