

WiselIndex 2022

7 — Last update: 21 February 2024

CSoft AS

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2. Server Requirements

Server Requirements

- **Operating System Requirement:** Windows Server 2012 R2+
- **.net Framework:** .NET Core 3.1 (Windows Server)
- **Application Server:** IIS 8.0+
- **Supported Databases:** MS SQL Server Express 2008 R2+
- **Hard Disk:** minimum of 10 GB
- **Memory:** 4 GB
- **Processor Speed:** Recommended: 2.8 GHz or faster

Solr Server Requirements (Depends on the documents storage)

- **Operating System Requirement:** any.
- **Hard Disk:** minimum of 10 GB
- **Memory:** 2 GB minimum (minimum 1GB standby to run Solr is recommended)

Tika and Tesseract server Requirements

- **Operating System Requirement:** any.
- **Hard Disk:** minimum of 10 GB
- **Memory:** 2 GB

3. 2.Introduction

WiselIndex 2022 is a web based document archiving and revision management software. An archive is a database that holds references to documents, attributes and linked data. WiselIndex collects and organizes documents. WiselIndex can contain CAD files like .DWG, .DXF or .DGN, documents such as .PDF files, scanned images, digital photos or any kind of imagery and more. WiselIndex Uses Departments, Projects, Tags, Filters and Views to simplify locating and using documents. WiselIndex 2022 inherits all the good features from EDA, such as filtering and multi-user, multi-role support to facilitate document management in a distributed environment. WiselIndex 2022 spreads its functionality to facilitate revision management of documents. WiselIndex utilizes a hybrid drawing database approach, effectively working with documents and associated data. It can contain image referenced fields with text comments to maintain relation between multiple documents.

WiselIndex incorporates a powerful search engine that facilitates searching

This document attempts to be a comprehensive guide to WiselIndex 2022. This document will attempt to cover the steps needed to install WiselIndex in your local intranet. It will detail the settings needed to configure WiselIndex. Also, this will function as an exhaustive manual to guide you through all the features in WiselIndex.

We will also compose a list of frequently asked questions (FAQs) at the end of this document

This is a web based manual. Your comments and suggestions are welcome and will assist us in continuously improving our user guide. Please send us your feedback in the space available below

4. 3.Installation Guide

5. 4. Configuration Guide

6. 5. Getting Started

This chapter will present a brief overview of WiselIndex. This will include the concept of document archiving and revision management in WiselIndex and various entities and phrases used in WiselIndex and their purpose. This chapter will also attempt to describe how to get around WiselIndex. This section will explain the navigation menus as well as common controls on WiselIndex. Once the basic idea is communicated, we will try to explain a scenario where user(s) will be able to find a particular document and work with it.

Following are the subtopics covered in this chapter:

- [5.1 Overview of WiselIndex 2020](#)
- [5.2 Navigation](#)
- [5.3 Finding Documents](#)

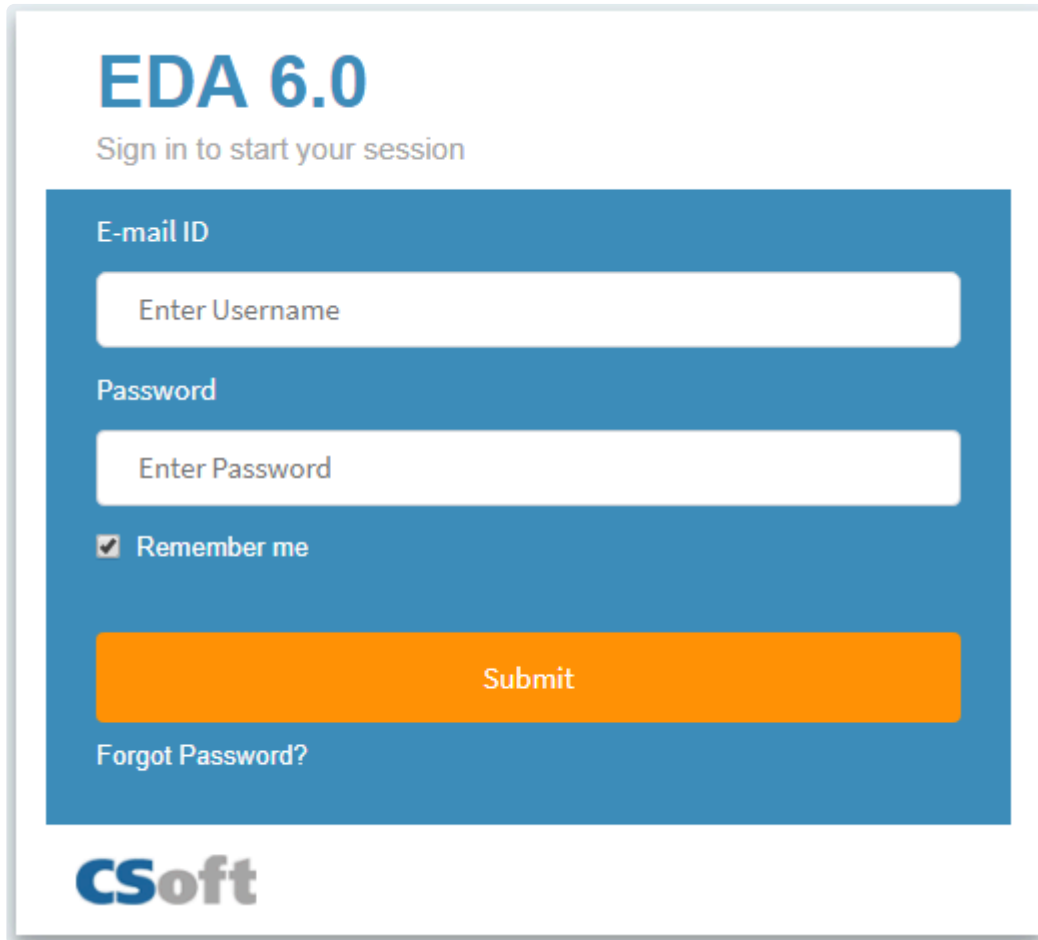
6.1. 5.1 Overview of WiselIndex 2022

WiselIndex is a Web based Archiving and Revision Management Software. This application is mainly targeted towards today's companies where there are multiple teams working with multiple documents across various locations. WiselIndex groups the documents into logical structures to help users archive their important documents. WiselIndex also manages revisions of documents by storing every version of the document throughout its lifetime.

6.2. 5.2 Navigation

Navigating within WiselIndex

WiselIndex offers a login screen to the user. WiselIndex only allows authenticated users to view and work on the documents stored inside WiselIndex.



The login screen can show your company logo for personalization and customization. This logo can be setup by the server administrator through the WiselIndex Configuration Wizard available in the server where WiselIndex is installed. The steps for this are detailed in the Configuration Guide Section. Alternatively it can also be setup by the administrator user (System Admin) through his/her login. The steps of this will be discussed in detailed in the Section.

Basic Access Points

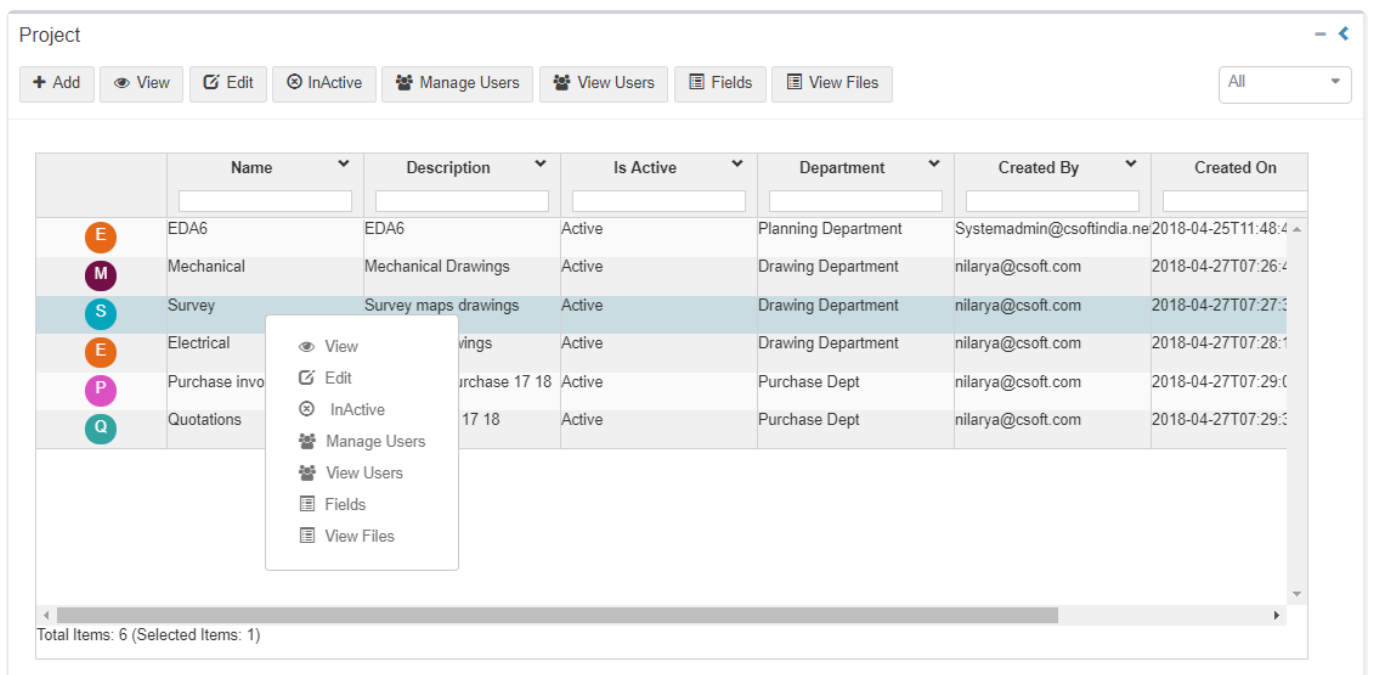
Once you login successfully, you will be taken to the Dashboard. The Dashboard is the basic page lists the available menus/ Access Points on the left side, the users profile information on the top-right side and license information on the bottom-right side of the page.



The above image displays the Dashboard of a System Admin.

List Controls

WiselIndex offers several list controls to the users. Each list item normally has several actions associated with it. to access the actions, the user has two alternative options. She can either select the list item by left click of the mouse button. The available actions are then listed as buttons on top of the list control. She can also right click on the selected list item and available actions are then listed as the context menu.



the above image displays both the options of accessing available actions in a list control.

6.3. 5.3 Setting up WiselIndex

WiselIndex has two basic types of login. One is SystemAdmin login another is normal login. There must be one user with systemadmin role. Without this role, WiselIndex setup is not possible. Once the systemadmin login into the system, he/she will be taken to first set up page. There he/she has to set up the system as below order:

1. Enterprise details

Systemadmin has to add an enterprise before starting WiselIndex.


To add an enterprise, complete the steps:

- Enter a name
- Enterprise phone, Email id
- Enter address

Then click next

Set up your profile

Enterprise System Role User Department Project



Company Name
Name*

Phone **Email**
Enter phone Enter email

Address
Line 1 Line 2
City State

[Next >](#)

2. Set up mail

Then it is required to set up a mail server and test mail server setup. Follow the steps:

- Enter an email id
- Enter password
- Enter valid hostname, port number
- Enable SSL.

Set up your profile
✕

Enterprise
System
Role
User
Department
Project

?

Email

Password

Host name

Port No

Enable SSL

◀ Next ▶

Once email configuration is completed, you can send a test mail. To send a test mail, enter email details and send.

Test Mail
✕

To...

Cc..

Subject:

Message

3.Add roles

Then add roles. For the steps of adding a role view the topic [Add role](#)

Set up your profile



Enterprise System **Role** User Department Project

+ Add role



Name	Description	Created By
SystemAdmin	Admin user who ...	SystemAdmin@cso...
Fullaccessrole	Role that has a...	Systemadmin@cso...

< Next >

4.Add user

Once role is created, assign the role to a user. For creating the user, see the topic [Add user](#)

Set up your profile

Enterprise System Role **User** Department Project

+ Add User

Email	Full Name	Role
Systemadmin@cso...	SystemAdmin	SystemAdmin
somnath@csoftin...	somnath maji	Fullaccessrole
nabamita@csofti...	somnath@csoftindia.net	Fullaccessrole
arka@csoftindia...	arka dey	Fullaccessrole
sohini@csoftind...	sohini bose	Fullaccessrole



After creating roles, add departments and projects.

5.Add departments

To add departments, see the topic [Add departments](#)

Set up your profile

Enterprise System Role User **Department** Project

+ Add Department

Name	Description	HOD
test Design	design	sohini bose
Marketing	Test Marketing Test Marketing	sohini bose
it development	it development	Nabamita sanya...
department for ...	department for ...	somnath maji

← Next →

6.Add projects

To add projects,see the topic [Add projects](#)

Set up your profile

Enterprise System Role User Department **Project**

+ Add Project

Name	Description	Department
design project	design	test Design
Partner portal	Test Partner po... Test Partner portal	Marketing
project for dev...	project for dev...	department for ...
project from de...	project from de...	department for ...
it project deve...	it project deve...	it development

← Finish

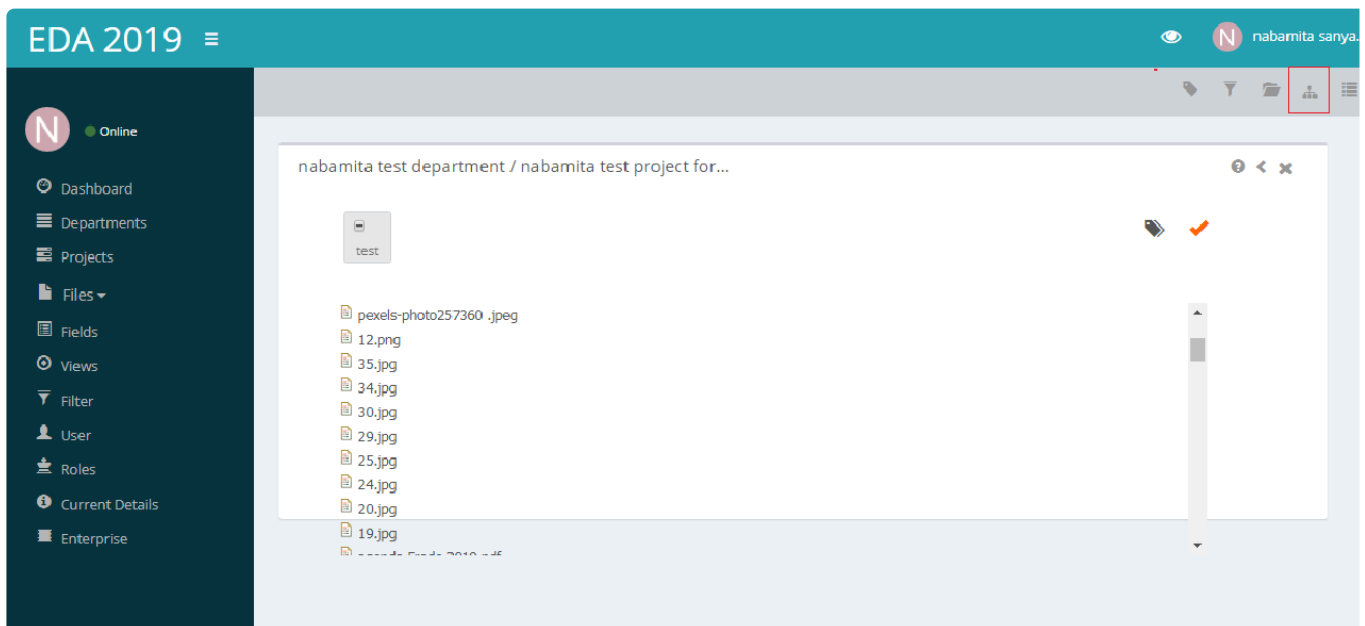
Your profile set up is 100% completed.Now you can login into WisIndex with your userid and password and start exploring the software.

6.4. 5.4 Finding Documents

WiselIndex stores files and helps to find a document using various option.We can search a file using **Tag,Filter,View,Temporary view,Temporary filter**.Here is the various methods for viewing files:

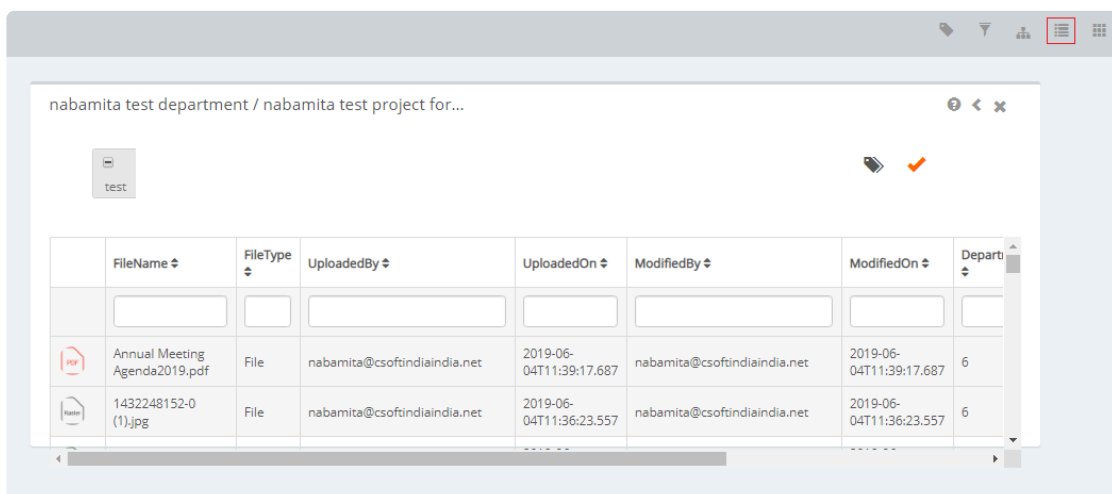
- **Tree view:**

In tree view we can view the files in folder and subfolder manner.Tree view looks like below screenshot.



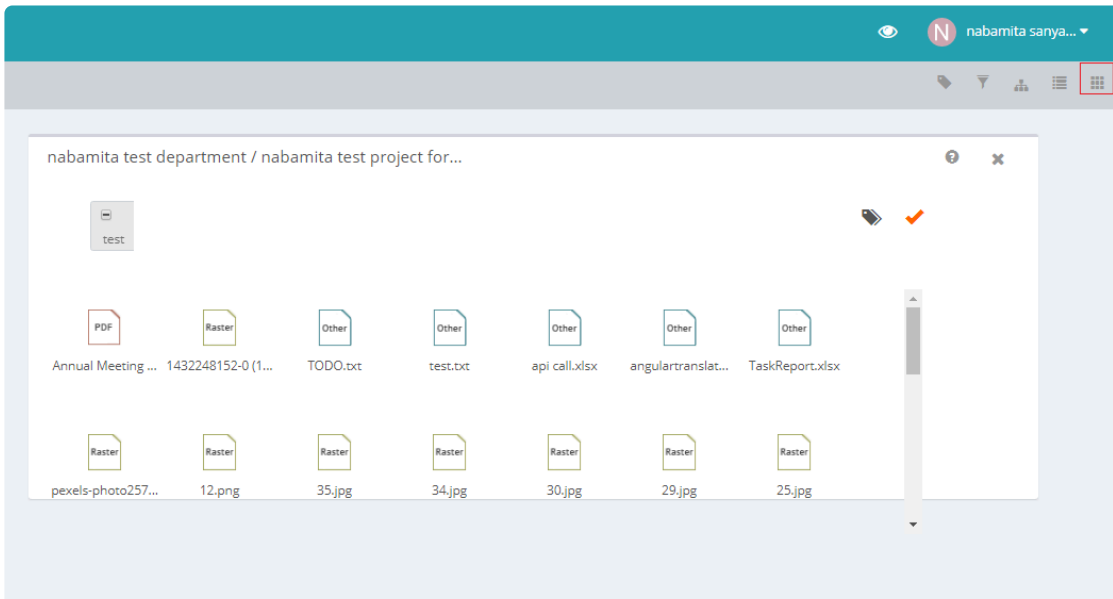
- **List view**

In list view we can view the files in list.List view looks like below screenshot.



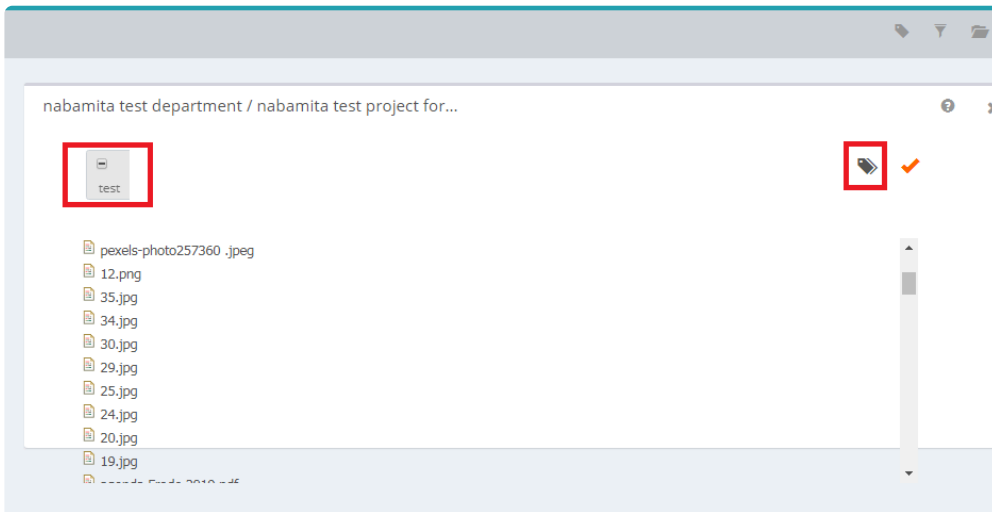
- **Thumbnail view**

Screenshot for thumbnail view is given below.



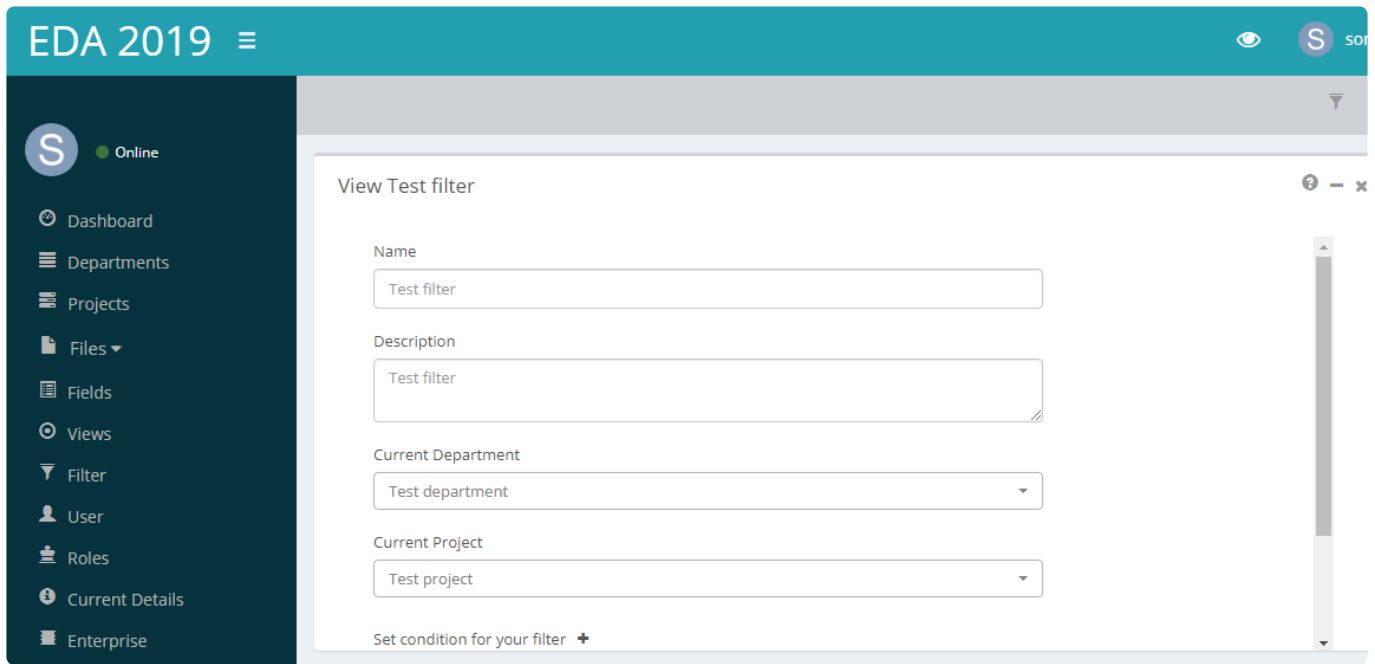
- **Tags**

A tag is a keyword that helps to describe a file and allows to search a file. You can select a tag at the top of any view. And click apply. See topic [Add tag](#)



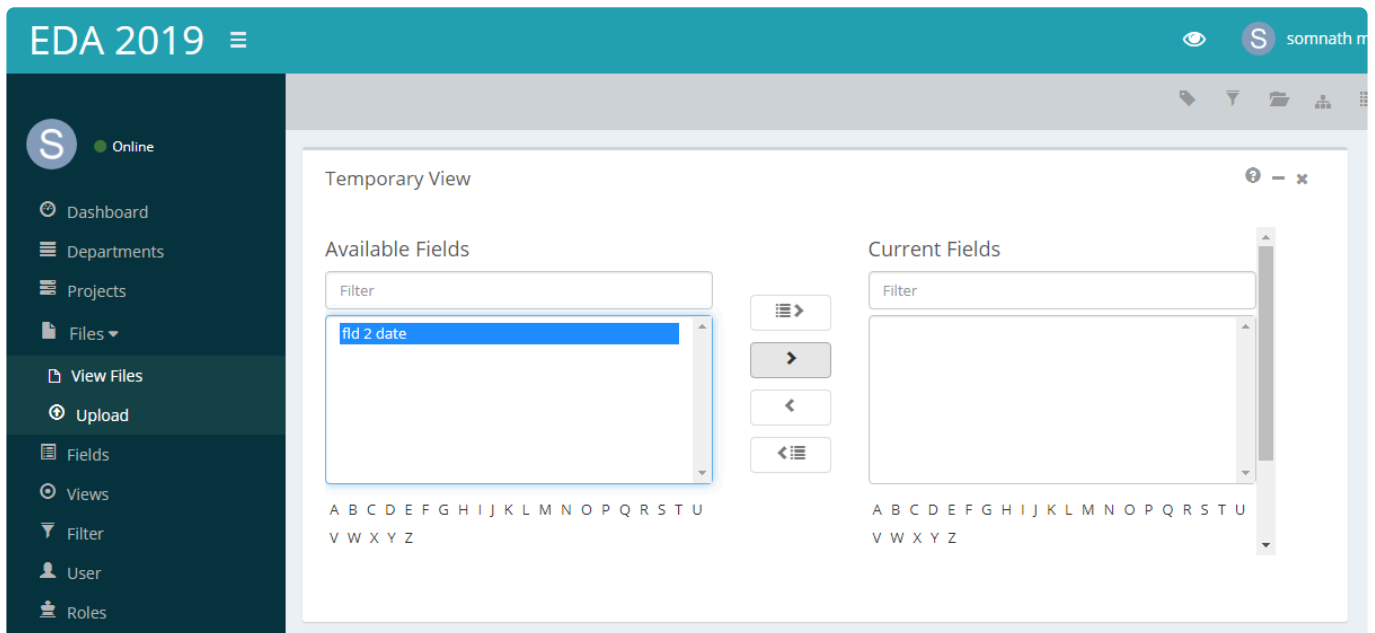
- **Filter**

A filter works on some conditions. you have to add some fields in files. you can set conditions according to the field name and value. Using the filter we can view files which match the filter conditions. See topic [Add filter](#)



- **Temporary view**

Temporary view allows user to search a file without saving view. User can create a temporary view with some field. The fields will be applicable to that file. See topic [Add quick view](#)



- **Temporary filter**

Temporary filter allows to search files without saving a filter. See topic [Temporary filter](#)

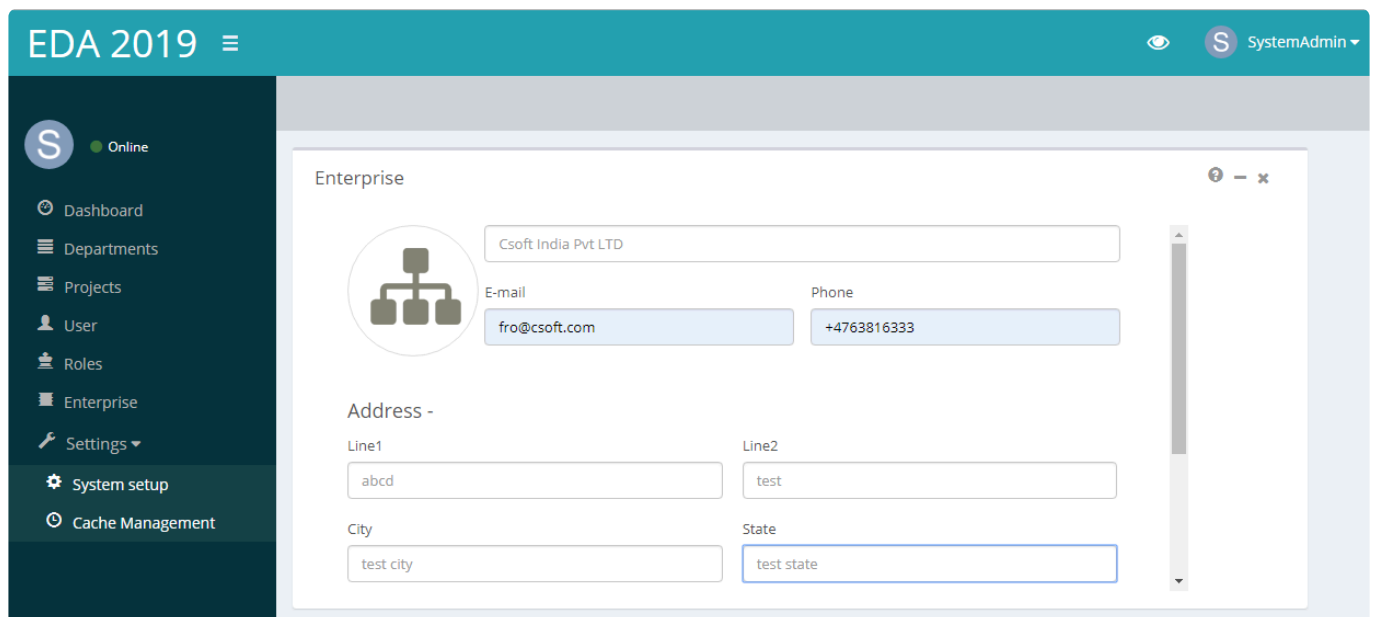
The screenshot shows a web browser window with a teal header bar. In the top right corner, there is a user profile icon with the name 'nabamita sanya...' and a red square highlighting a filter icon in the browser's address bar. The main content area displays a 'Quick Search' dialog box. At the top of the dialog, it says 'Quick Search' with a help icon, a back arrow, and a close 'x' icon. Below this, there is a section titled 'Set condition for your filter +' with a plus sign. This section contains a table with three columns: 'Select Field', 'Set Condition', and 'Set Value'. Each row in the table has a dropdown menu for 'Select Field', a dropdown menu for 'Set Condition', and a text input field for 'Set Value'. There are five rows in total. At the bottom right of the dialog, there is an orange button.

Select Field	Set Condition	Set Value
Select	Select	
Select	Select	
Select	Select	
Select	Select	
Select	Select	

7. 6. Enterprise

Enterprise is another word for **organization** or **company**.It is the first step to add an enterprise in WiselIndex.To add an enterprise,complete the steps:

1. Navigate to Dashboard>Enterprise
2. Enter name of the enterprise
3. Give a profile image
4. Add enterprise email id and phone number
5. Enter address
6. Click save



The screenshot displays the 'Enterprise' management interface in EDA 2019. The interface includes a sidebar with navigation options: Dashboard, Departments, Projects, User, Roles, Enterprise, Settings, System setup, and Cache Management. The main content area shows the 'Enterprise' form with the following fields:

- Name:** Csoft India Pvt LTD
- E-mail:** fro@csoft.com
- Phone:** +4763816333
- Address -**
 - Line1:** abcd
 - Line2:** test
 - City:** test city
 - State:** test state

8. 7. Departments

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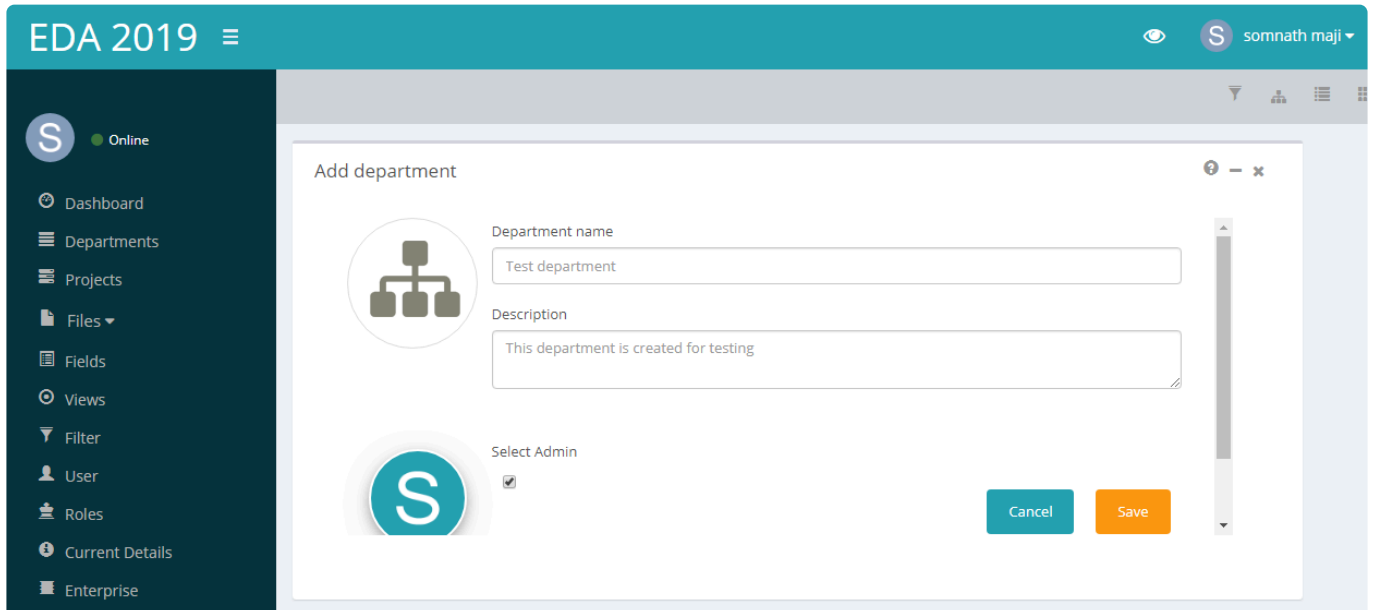
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8.1. 7.1 Add Departments

In this section, we will learn the steps for adding a department. The required fields to add a department are: **Department name**, **Department description** and **Admin**. To add a department, navigate to **Dashboard > Department** and complete the following steps:

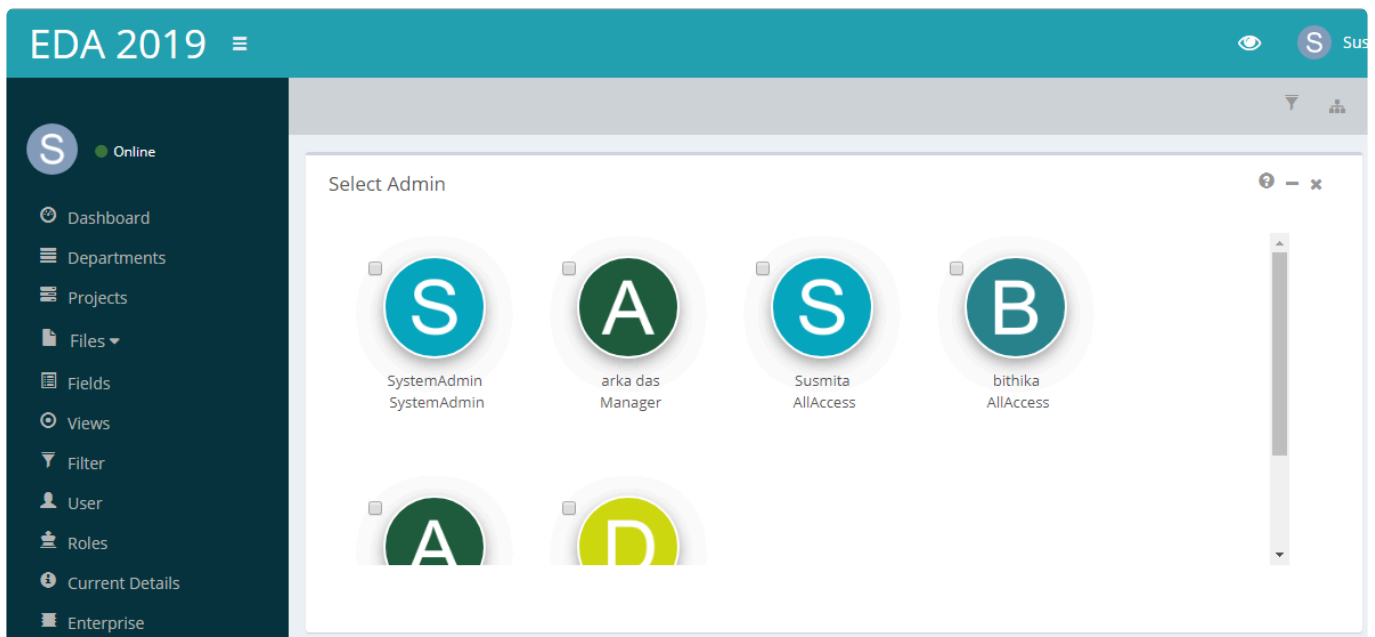
1. Enter a Title
2. Enter a description
3. Select a user as department admin.



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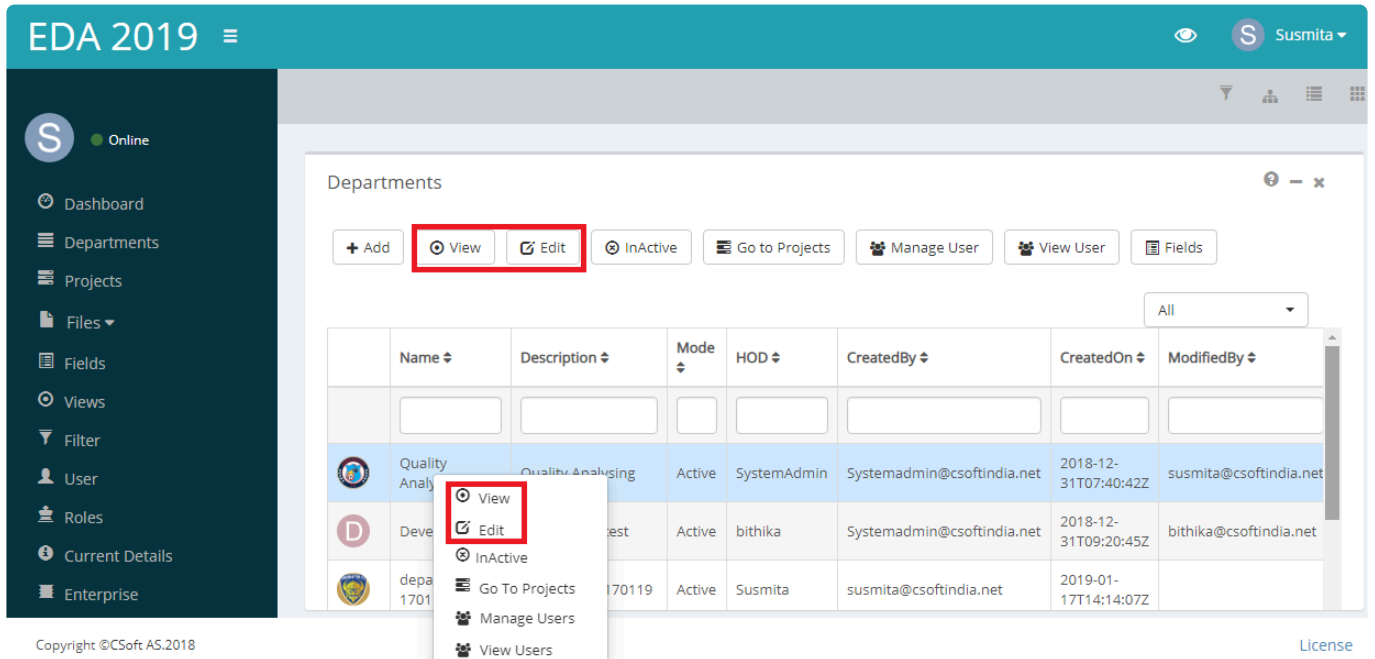
We can choose anyone from the user list as an admin. First we have to select the check box **Select Admin**. A new page of user list will be opened. Just select the user whom you want to make admin.



Once we fill up the form properly, we can create department.

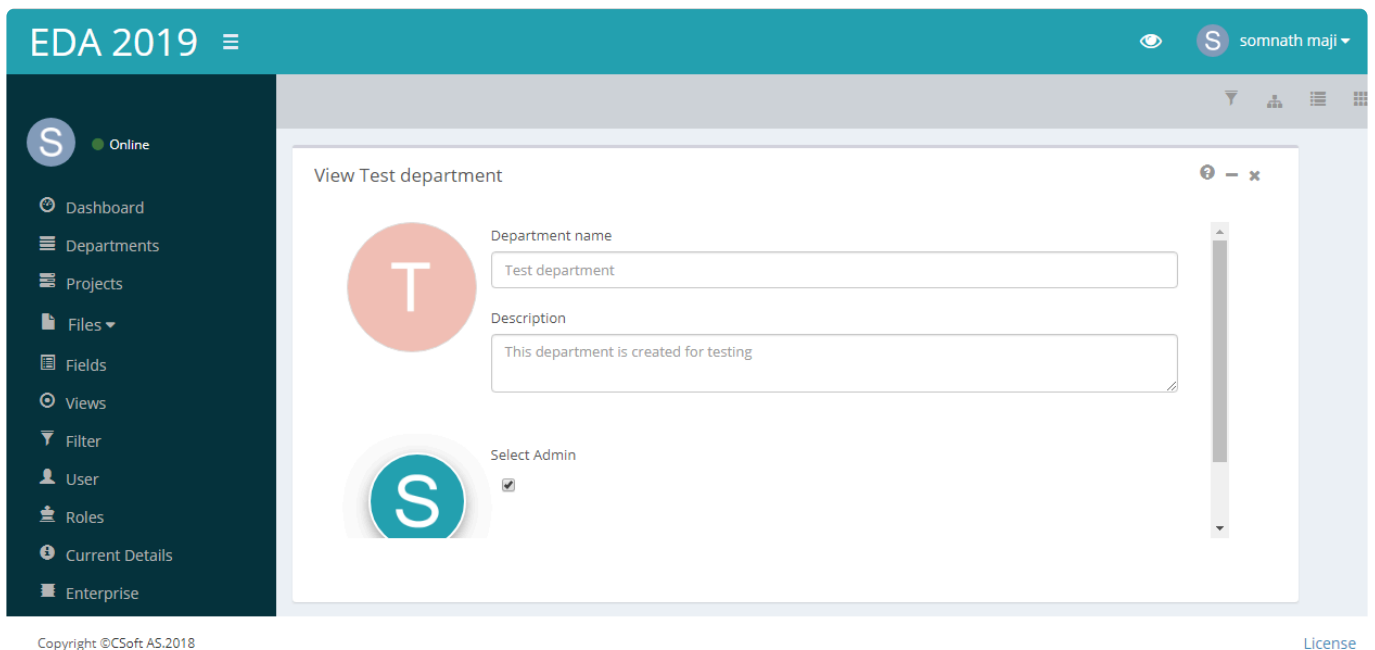
8.2. 7.2 View/Edit Departments

A department can be viewed or edited by two alternative options. User can either select the department by left click of the mouse button. The **edit/view** are then listed as buttons on top of the list control. User can also right click on the department name and **edit/view** options are then listed as the context menu.



View Departments:

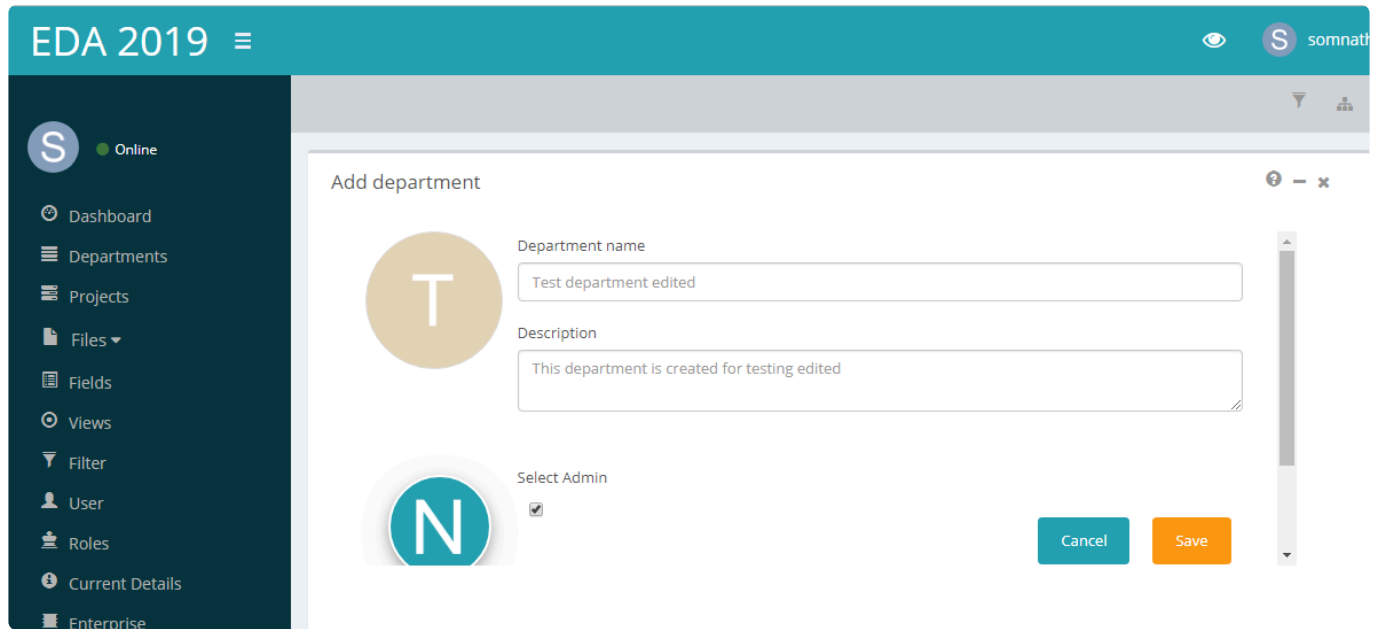
In this section we can only view a saved department can not edit the department.



Edit department:

To edit a saved department, select the department to edit and complete the following steps.

- Modify the department name and description as necessary.
- Change the department admin as necessary
- Click Save.



The screenshot displays the 'Add department' form within the EDA 2019 application. The interface includes a teal header with 'EDA 2019' and a user profile 'S somnath'. A dark sidebar on the left contains navigation options: Dashboard, Departments, Projects, Files, Fields, Views, Filter, User, Roles, Current Details, and Enterprise. The main content area shows a form with the following fields:

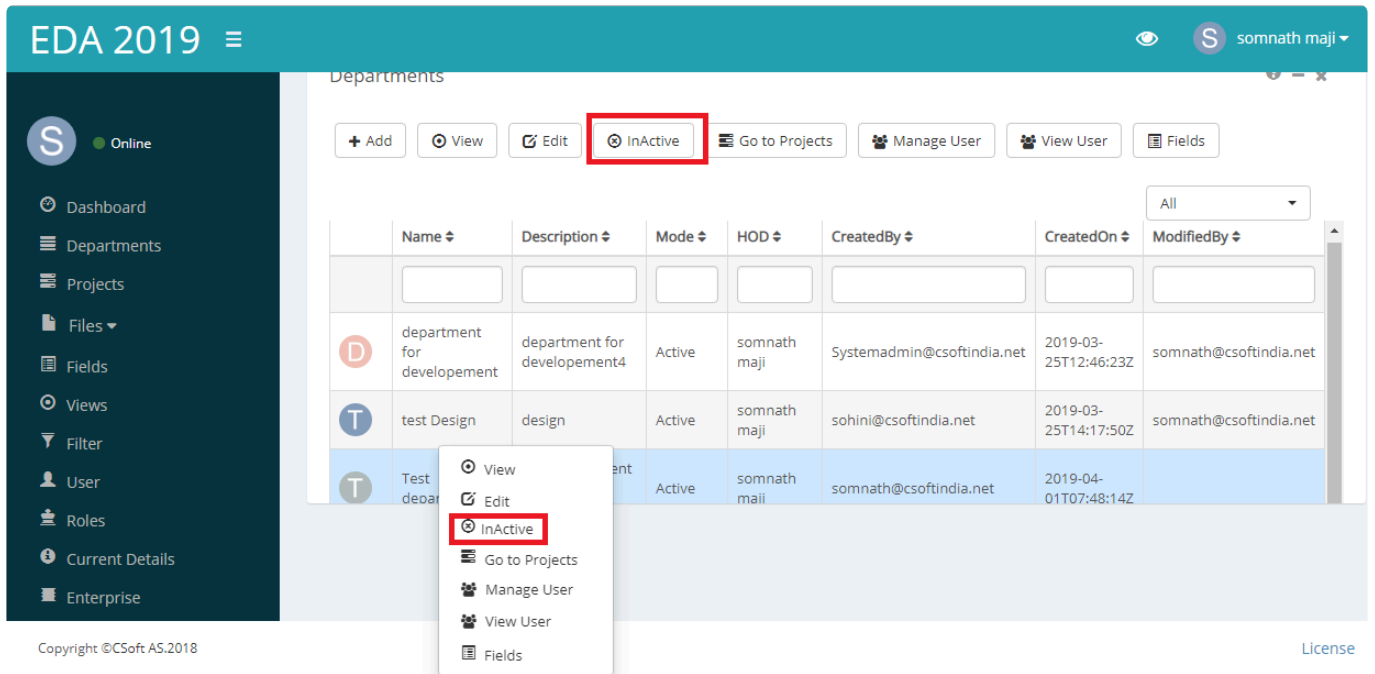
- Department name:** A text input field containing 'Test department edited'.
- Description:** A text area containing 'This department is created for testing edited'.
- Select Admin:** A dropdown menu with a checked selection of a user represented by a blue circle with the letter 'N'.

At the bottom right of the form, there are two buttons: 'Cancel' (teal) and 'Save' (orange).

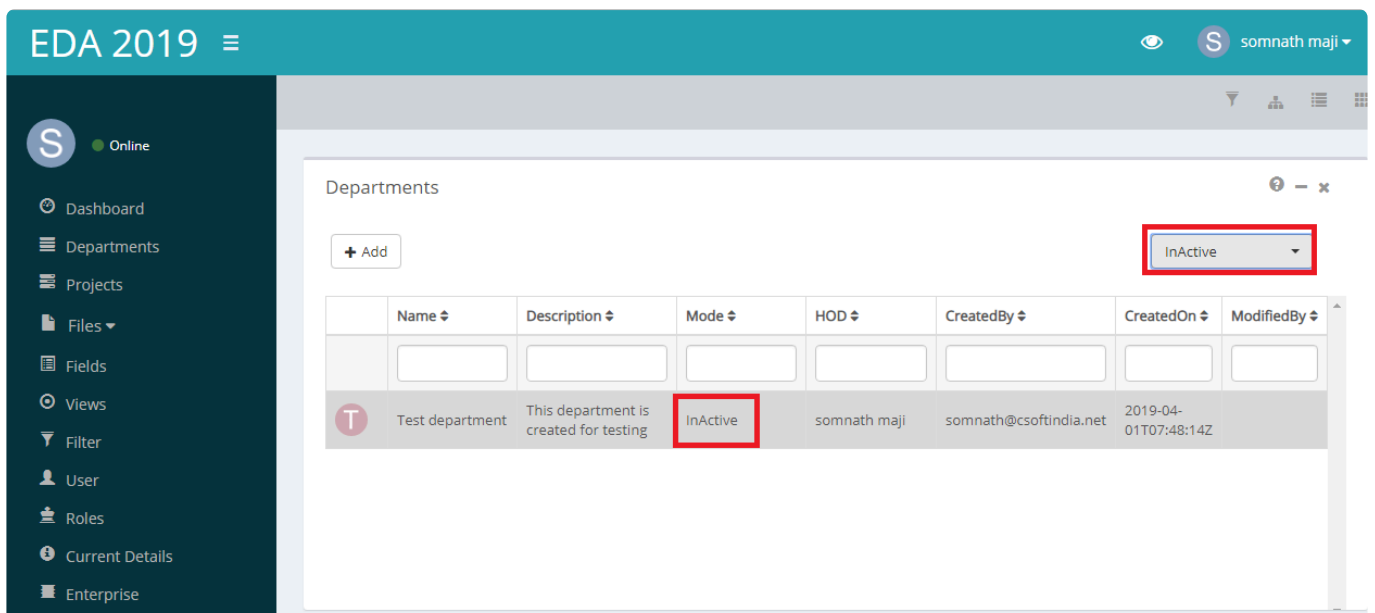
8.3. 7.3Active/Inactive Departmentnt

A department can not be deleted,it can be made **inactive** by **InActive** option.To access the option, the user has two alternative options. User can either select department by left click of the mouse button. The **InActive** option is then listed as buttons on top of the list control.

User can also right click on the department and **InActive** option is then listed as the context menu.



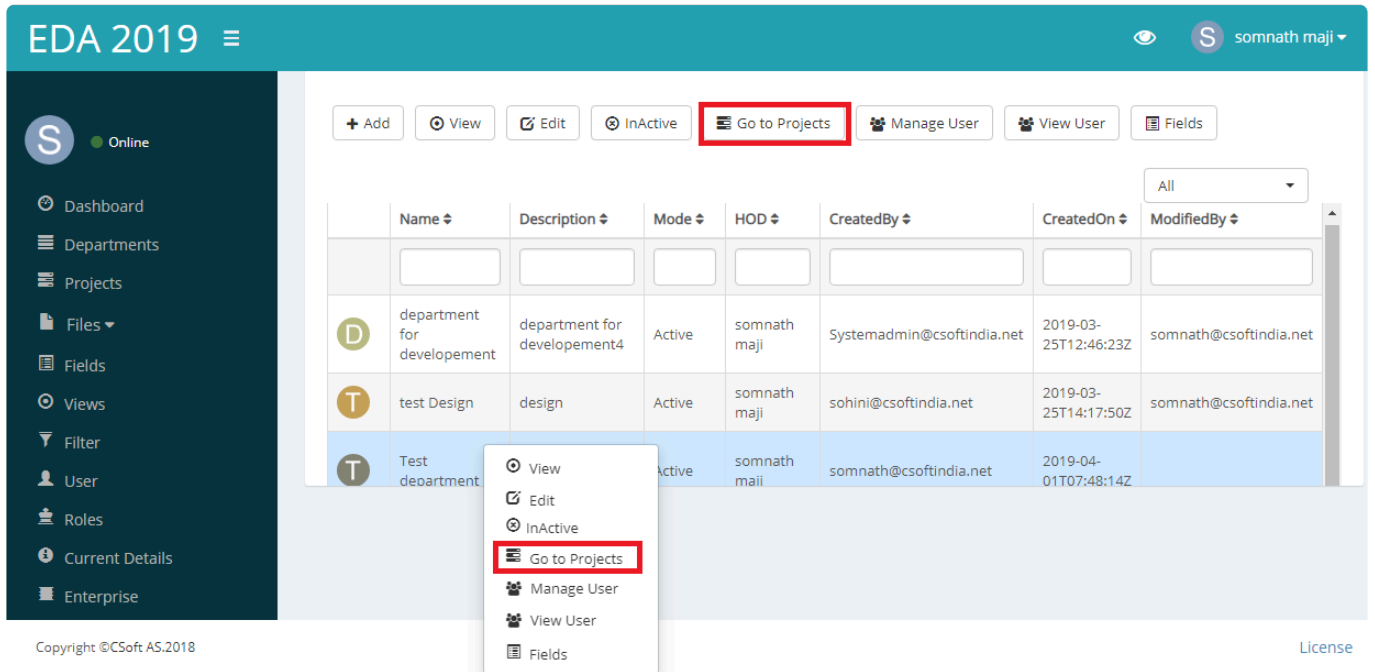
If a department is made inactive then it will go to the inactive list.And we can view the inactive list of department by selecting **InActive** option from the drop down list at the right side corner of the page.



8.4. 7.4 Manage department projects

We can add projects to a department by this option. To access the option, the user has two alternative options. She can either select department by left click of the mouse button. The **Go to projects** option is then listed as buttons on top of the list control.

She can also right click on the department and **Go to projects** option is then listed as the context menu.



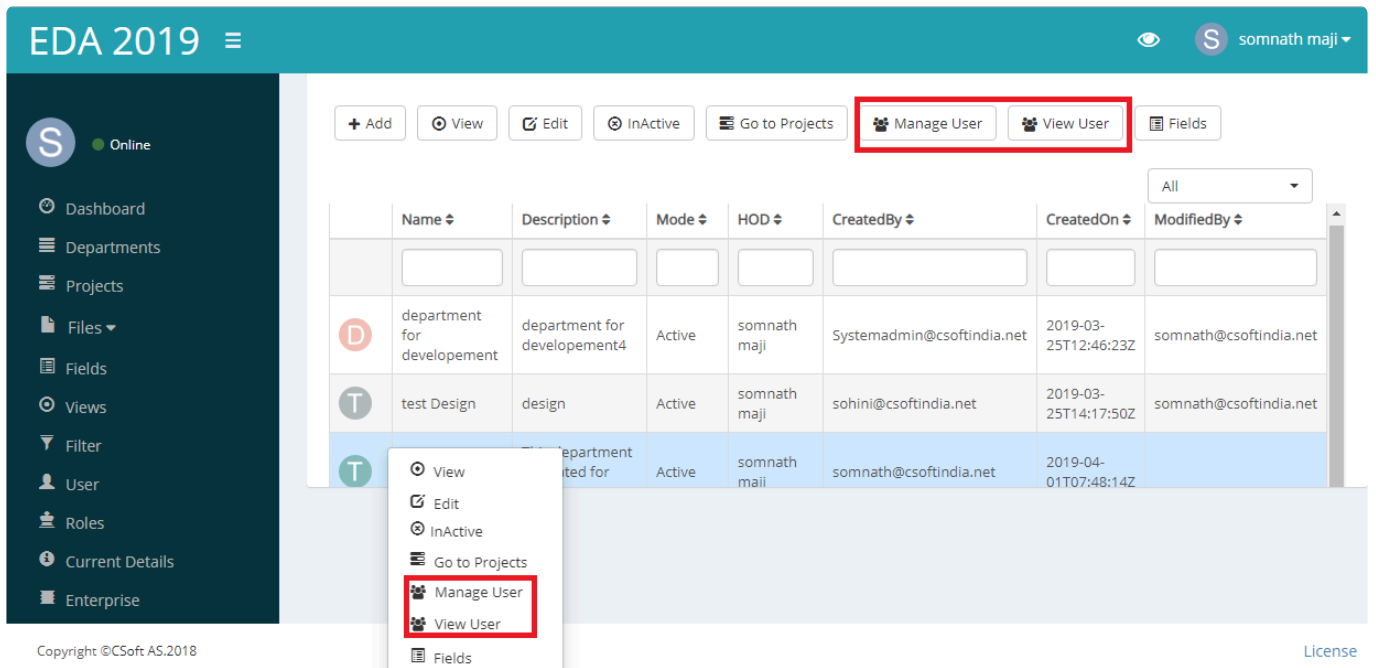
Manage projects:

User can directly add projects to the selected department and can access others project related actions by this option. The steps for this are detailed in the [Add project](#) section

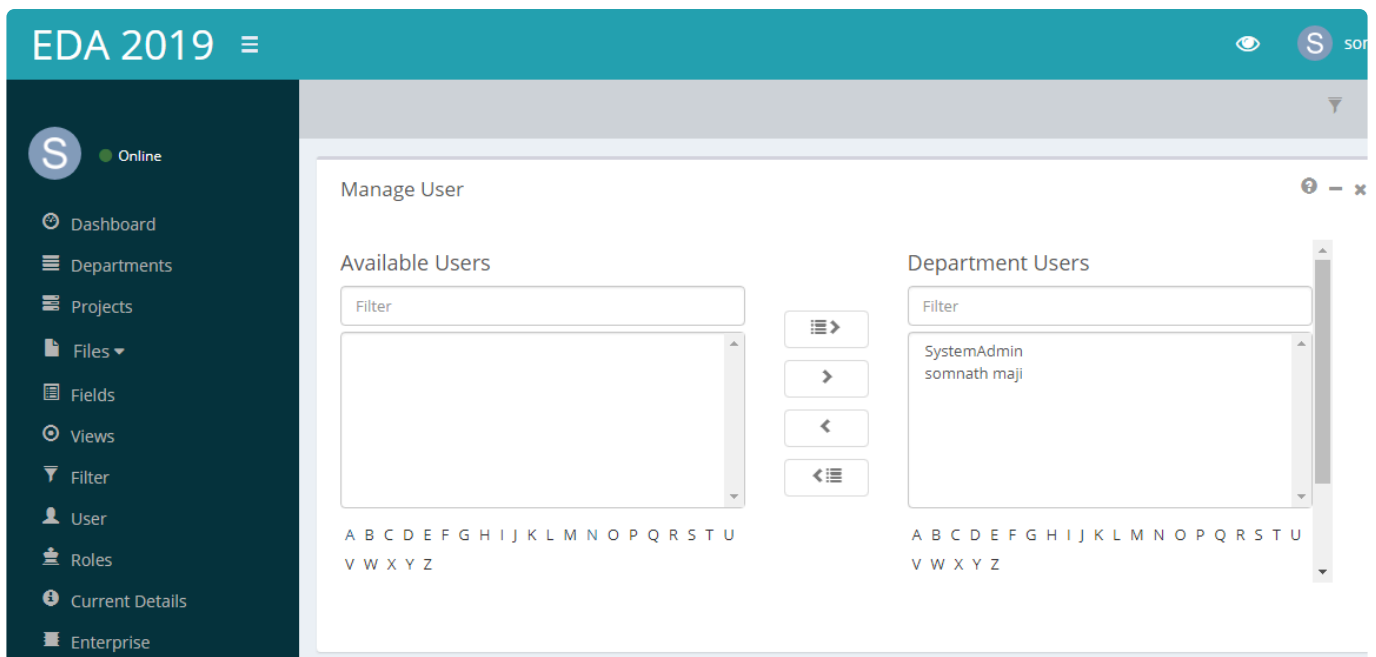
8.5. 7.5 Manage Department Users

We can add users to a departments by this list control. To access the option, the user has two alternative options. She can either select the department item by left click of the mouse button. The **Manage user** option is then listed as buttons on top of the list control.

User can also right click on the department and The **Manage user** option is then listed as the context menu.



The steps of this is detailed in the [Navigation](#).

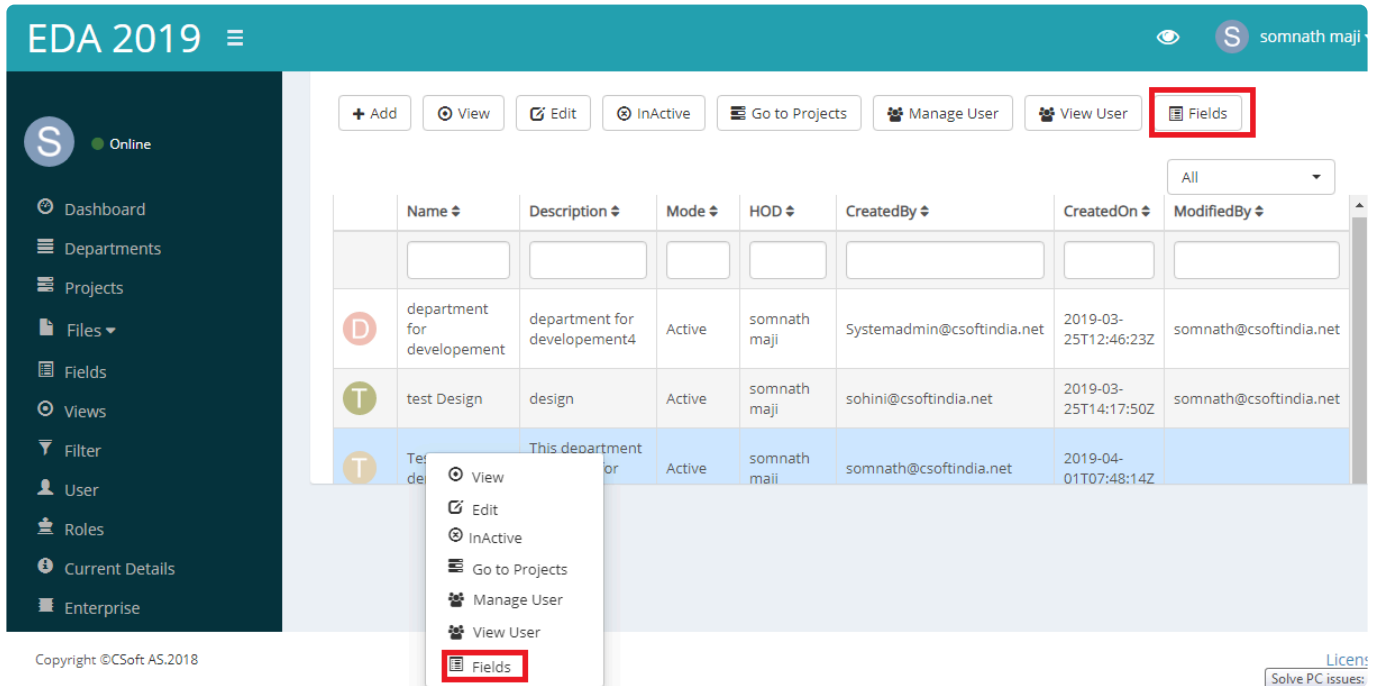


Note: If a user is admin of a particular department, then we can not remove him/her from user list

8.6. 7.6 Manage department fields

Department fields can be added by this option. To access the option, the user has two alternative options. She can either select department by left click of the mouse button. The **Fields** option is then listed as buttons on top of the list control.

She can also right click on the department and **Fields** option is then listed as the context menu.



Fields:

User can directly add fields to the selected department and can access others field related actions by this option. The steps for this are detailed in the [Field](#) section

9. 8. Projects

WiselIndex organizes documents in various logical groups. project is such a logical group in WiselIndex. A project may contain files. Every Department can contain multiple Projects.

Following are the subtopics covered in this chapter:

* [8.1 Add Projects](#)

* [8.2 View/Edit Projects](#)

* [8.3 Active/Inactive Projects](#)

* [8.4 Manage/View Project Users](#)

* [8.5 Manage project fields](#)

* [8.6 View project files](#)

9.1. 8.1 Add Projects

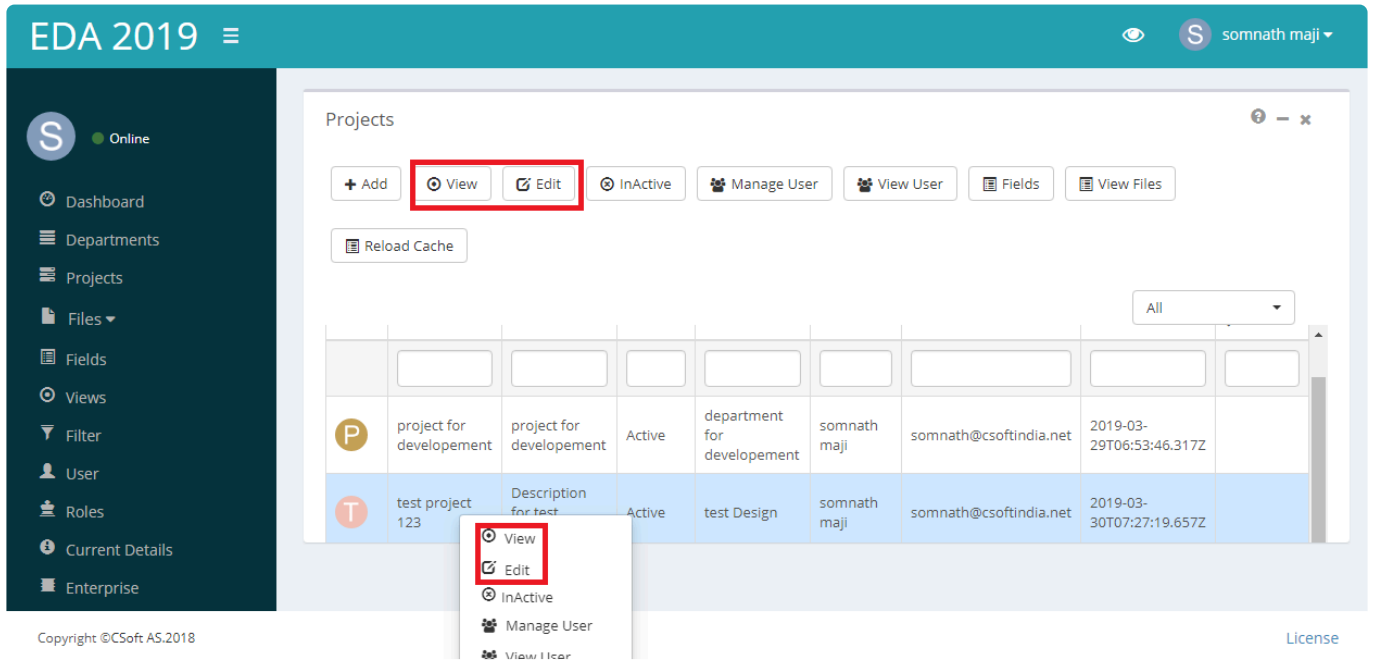
In this section, we will learn how to add Projects. Project can be added by two options. Either we can add project from **project** option on Dashboard or we can add projects from **manage projects** option in **department**. The required fields to add a project are: **Project name**, **Project description** and **Department**. To add a project, navigate to **Dashboard > Project** and complete the following steps:

1. Enter a Title
2. Enter a description
3. Select a department. We can choose a department from the department list in the drop down option.

The screenshot displays the 'Add Project' form within the EDA 2019 application. The form is titled 'Add Project' and features a tree icon on the left. It contains three input fields: 'Project Name' (containing 'Test project'), 'Description' (containing 'Test project created for testing'), and 'Department' (containing 'Test department'). The interface includes a sidebar with navigation options like Dashboard, Departments, Projects, Files, Fields, Views, Filter, User, Roles, Current Details, and Enterprise. The top header shows 'EDA 2019' and a user profile for 'somnath maji'.

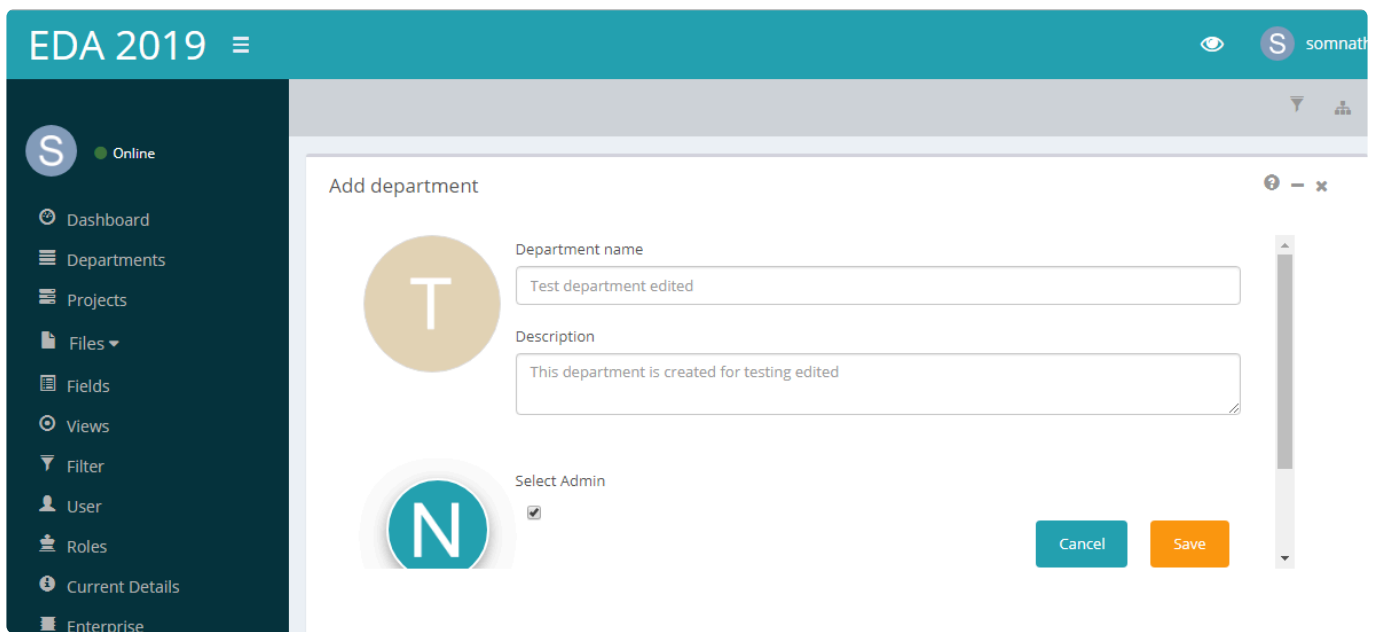
9.2. 8.2 View/Edit Projects

A project can be viewed or edited by two alternative options. User can either select the project by left click of the mouse button. The **edit/view** options are then listed as buttons on top of the list control. User can also right click on the project name and **edit/view** options are then listed as the context menu.



View Projects:

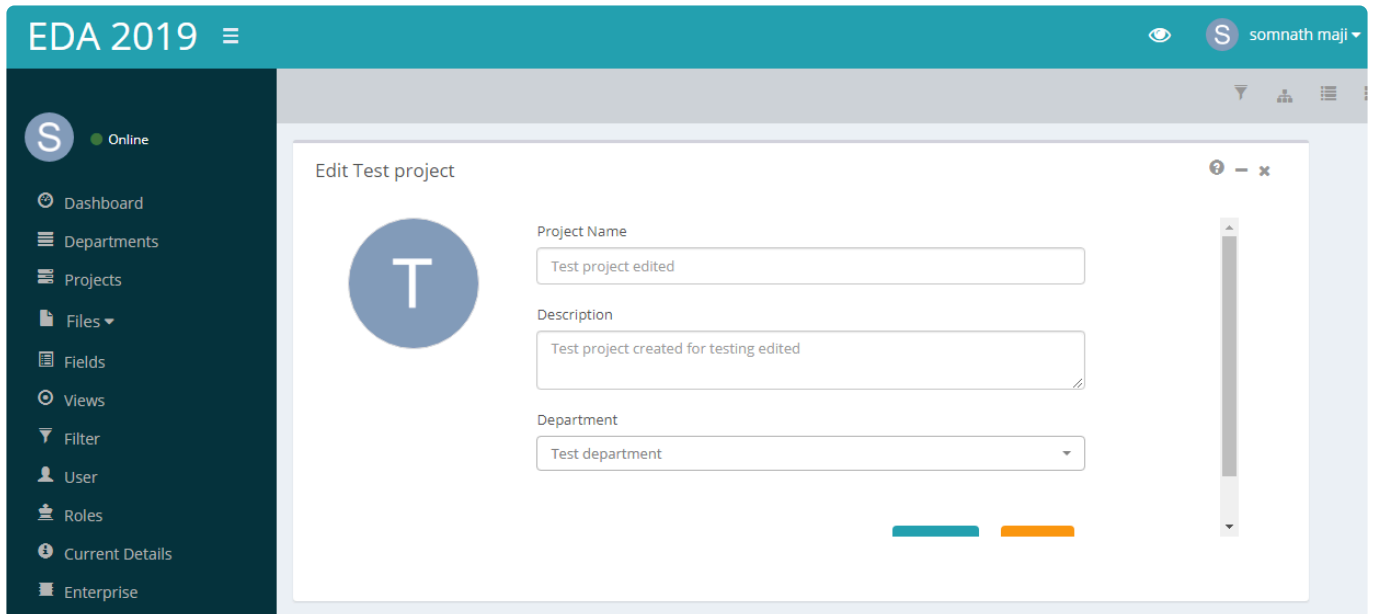
In this section we can only view a saved project can not edit the Project.



Edit Projects:

A saved project can be edited here. We can change the **project name, Description** only. The department

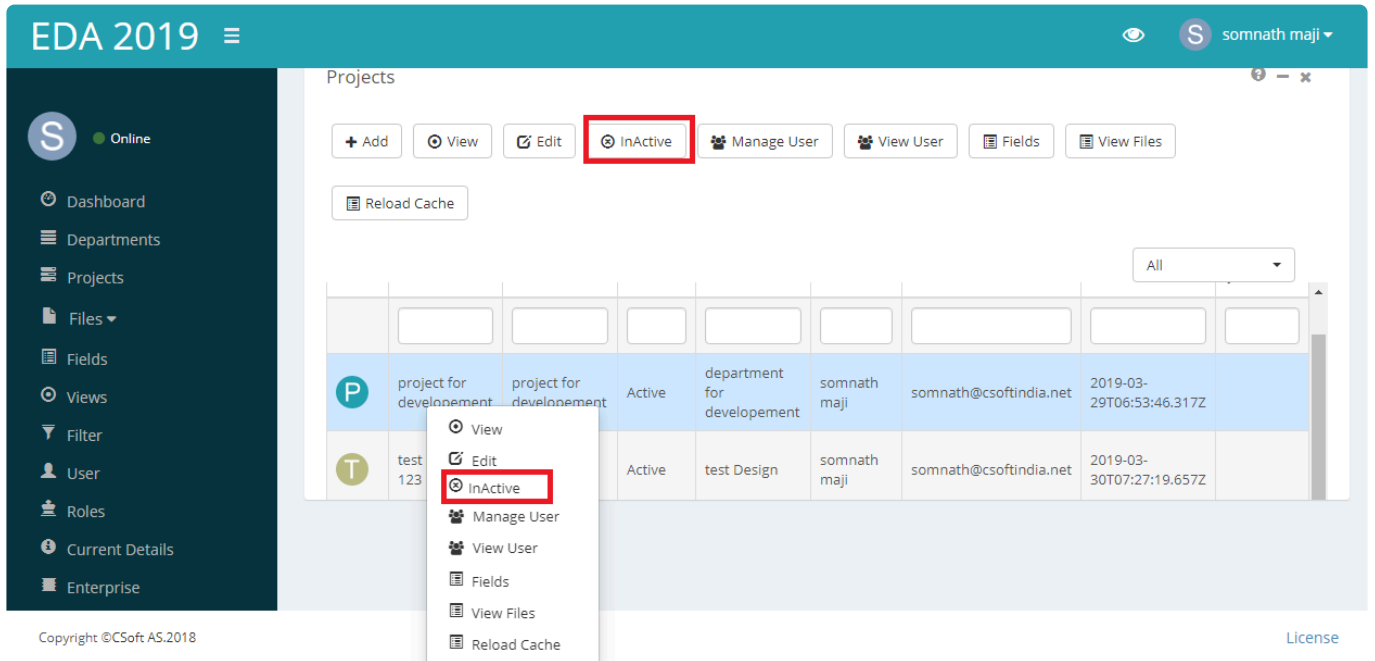
name is not allowed to modify.



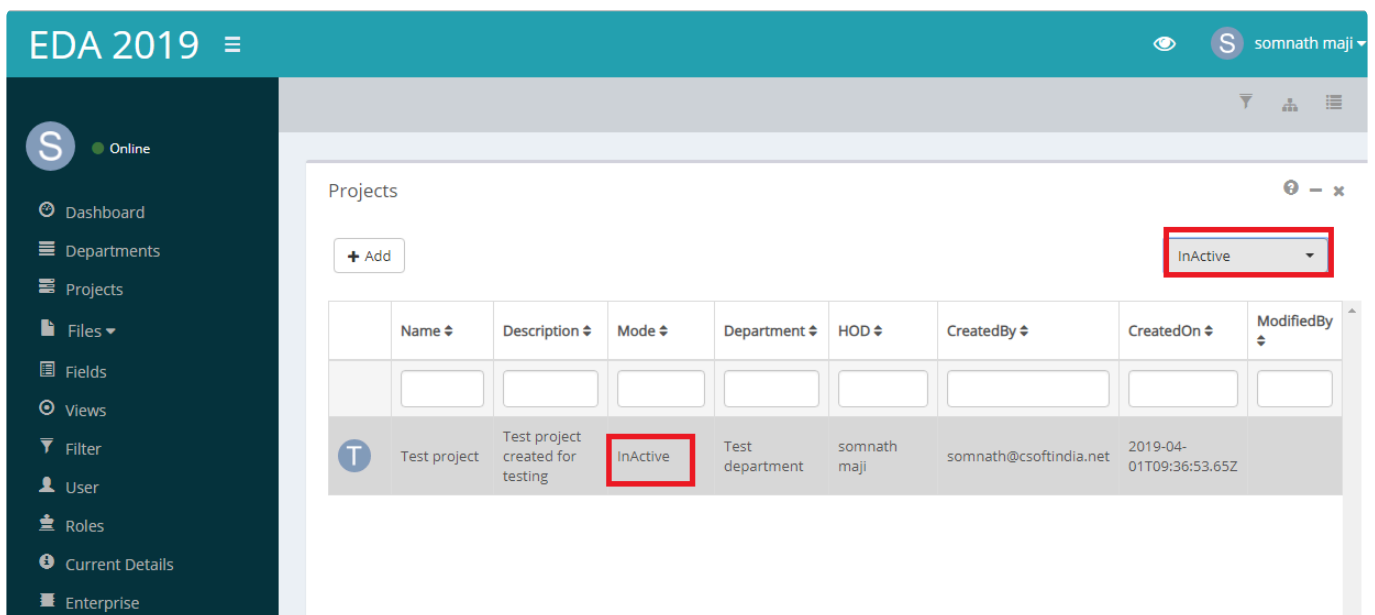
9.3. 8.3 Active/Inactive projects

A project can not be deleted, it can be made **inactive** by **InActive** option. To access the option, the user has two alternative options. User can either select project by left click of the mouse button. The **InActive** option is then listed as buttons on top of the list control.

User can also right click on the project and **InActive** option is then listed as the context menu.



If a project is made inactive then it will go to the inactive list. And we can view the inactive list of project by selecting **InActive** option from the drop down list at the right side corner of the page.



9.4. 8.4 Manage/View Project Users

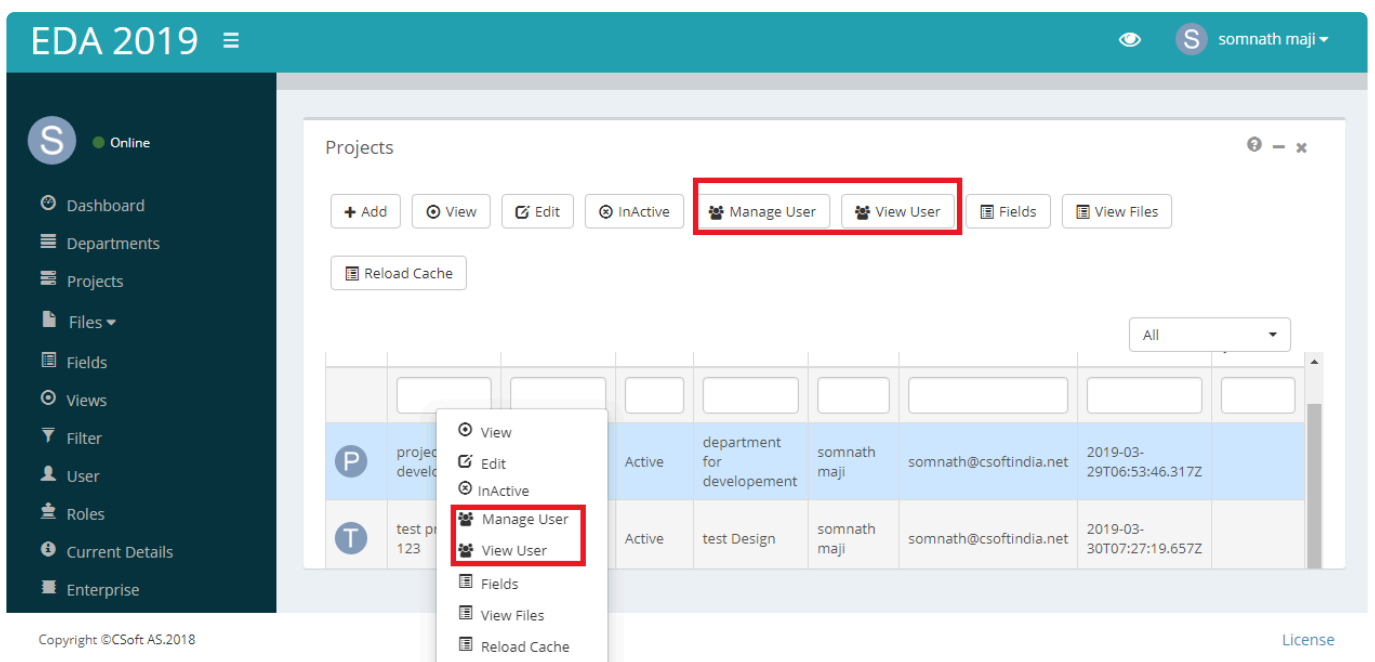
Users can be added and viewed by these options.

Manage user

We can add users to a project by this list control. To access the option, the user has two alternative options. User can either select the project item by left click of the mouse button. The **Manage user** option is then listed as buttons on top of the list control.

User can also right click on the project and The **Manage user** option is then listed as the context menu. (picture)

The steps of this is detailed in the Navigation section.



View user

Users of a project can only be viewed by this option. To access the option, the user has two alternative options. User can either select the project item by left click of the mouse button. The **View user** option is then listed as buttons on top of the list control.

User can also right click on the project and The **View user** option is then listed as the context menu.

EDA 2019 ☰ 👁 S somnath maji ▾

S Online

- Dashboard
- Departments
- Projects
- Files ▾
- Fields
- Views
- Filter
- User
- Roles
- Current Details
- Enterprise

Manage User

Available Users

Filter

--

A B C D E F G H I J K L M N O P Q R S T U
V W X Y Z

Project Users

Filter

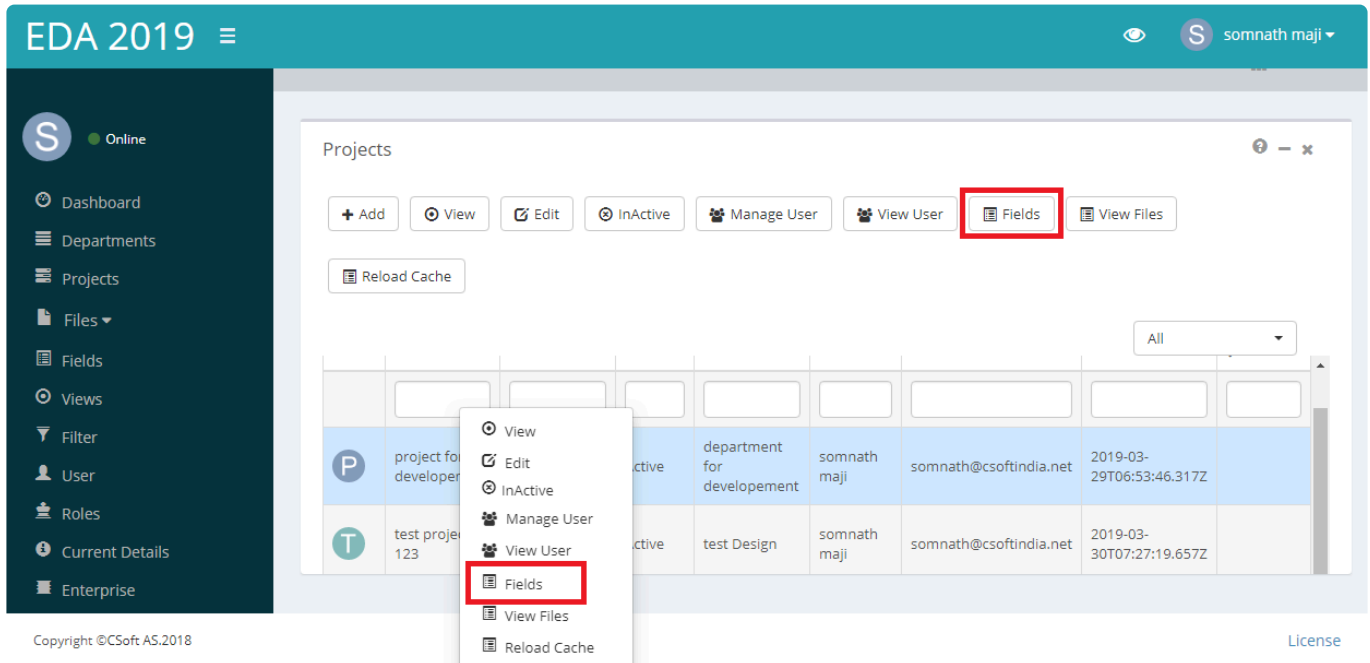
SystemAdmin
somnath maji

A B C D E F G H I J K L M N O P Q R S T U
V W X Y Z

9.5. 8.5 Manage project fields

Project fields can be added by this option. To access the option, the user has two alternative options. He/ She can either select project by left click of the mouse button. The **Fields** option is then listed as buttons on top of the list control.

He/She can also right click on the project and **Fields** option is then listed as the context menu.



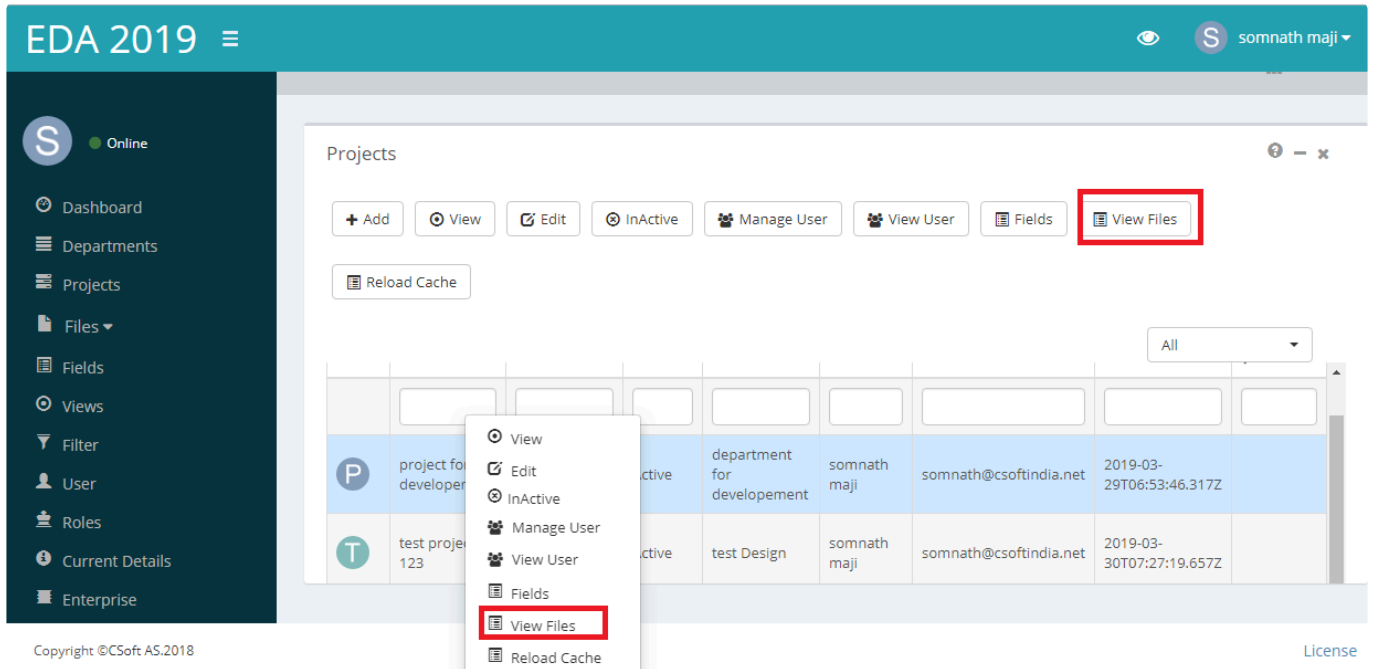
Fields:

User can directly add fields to the selected project and can access others field related actions by this option. The steps for this are detailed in the [Field](#) section.

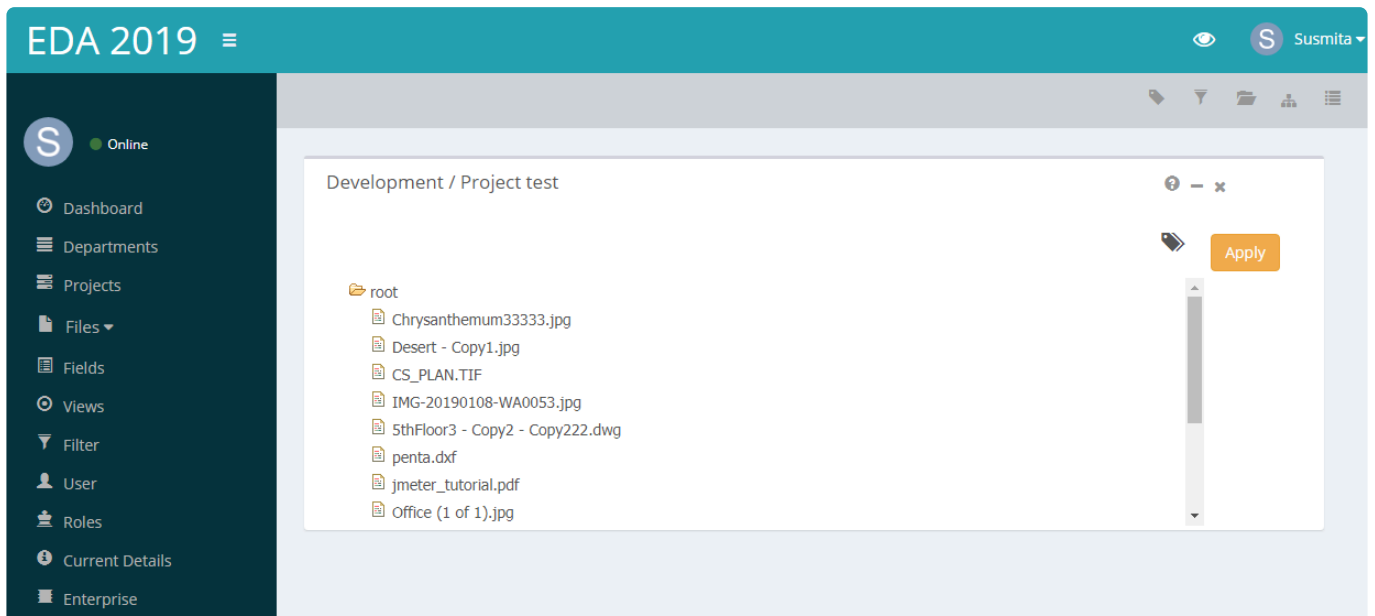
9.6. 8.6 View project files

Project files can be viewed by this option. To access the option, the user has two alternative options. He/She can either select project by left click of the mouse button. The **View files** option is then listed as buttons on top of the list control.

He/She can also right click on the project and **View files** option is then listed as the context menu.



We can view all the files those are uploaded under the selected project.



10. 9. Files

WiselIndex is a file archiving software which offers to store a bunch of files and keep tracks of them. This software makes it easier for you to search files. It can store a variety of document type such as pdf, image, CAD files etc. It is easy to modify a file through WiselIndex. If anyone make any changes to a document, WiselIndex can track them. WiselIndex manages multiple versions of the same file as revisions. Following are the subtopics covered in this chapter:

[9.1 Upload Files](#)

[9.2 View Files](#)

[9.3.1 View file information](#)

[9.2.2 Navigate within multiple documents](#)

[9.2.3 Navigate using layers](#)

[9.2.4 Search text](#)

[9.2.5 Other viewing controls](#)

[9.2.6 Annotations](#)

[9.3 Download files](#)

[9.4 Revisions](#)

[9.4.1 Upload a new revisions](#)

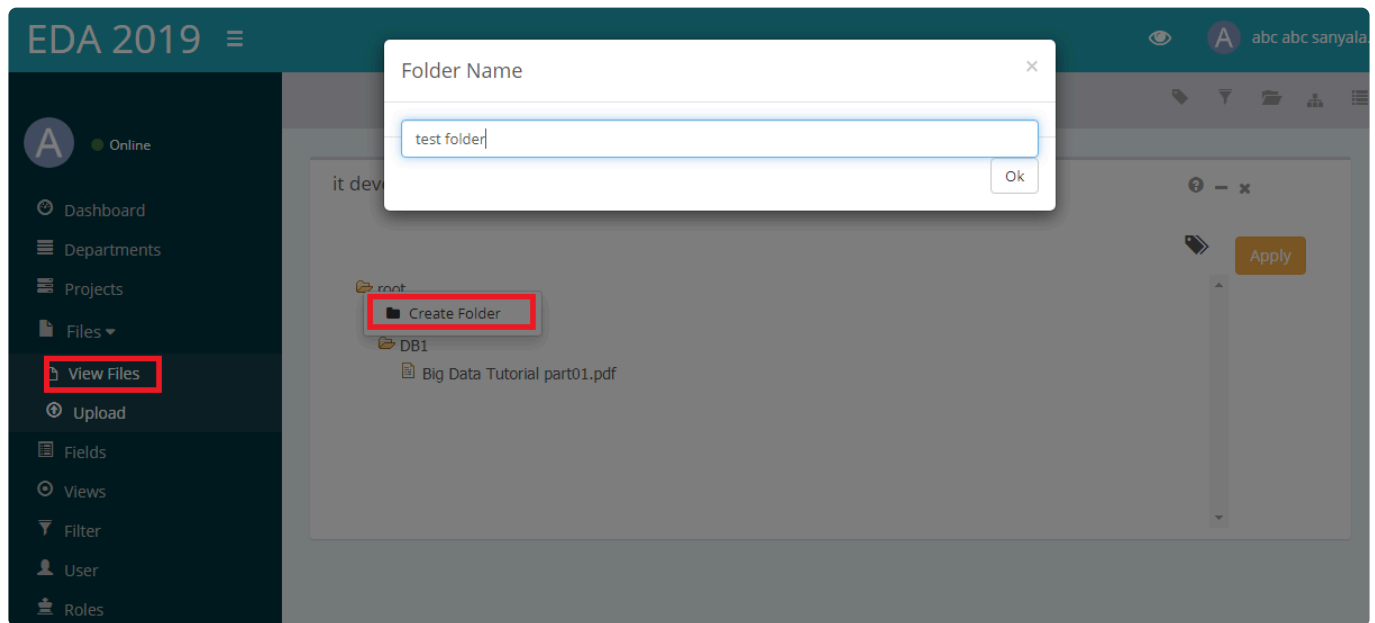
[9.4.2 View earlier revisions](#)

[9.5 Related files](#)

10.1. 9.1 Upload Files

We can create folder in WiselIndex.If we do not create a folder,then a file will be uploaded to root folder.Every new folder will be created under root folder.To create a folder,complete the step:

1. Navigate to Dashboard>Files>View Files.
2. Right click on root folder.
3. Create new folder



To upload a file in WiselIndex,complete the following steps:

Navigate to **Dashboard>Files>Upload files**

1. Select department from the dropdown
2. Select project from the dropdown
3. Select a folder where you wish to upload a file
4. Browse the file from your local system
5. Click upload

EDA 2019

abc abc sanyala...

Online

- Dashboard
- Departments
- Projects
- Files
- View Files
- Upload**
- Fields
- Views
- Filter
- User
- Roles

File Upload

You are uploading files to root/test folder

Select Department
it development

Select Project
project for developement5

Select Folder
test folder

Select files from your computer

Browse Upload

10.2. 9.2 View Files

In WiselIndex we can do multiple operations on files. We will cover the following operations in this section.

[*View file information](#)

[*Navigate within multipage documents](#)

[*Navigate using layers](#)

[*Search text](#)

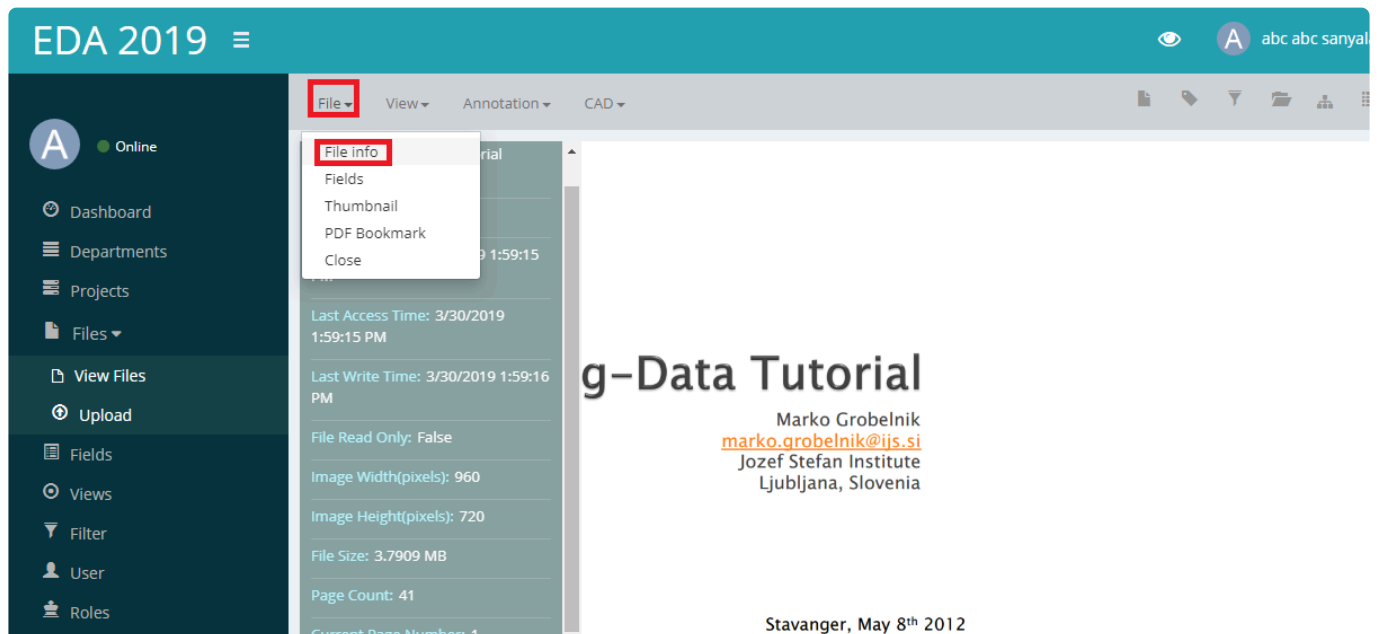
[*Other viewing controls](#)

[*Annotation](#)

10.2.1. 9.2.1 View file information

In WiselIndex we can view **file name, file format, size, creation time, last access time, read only status, last write time, file related fields** ([Fields](#).) To view a file information, here is the following steps:

1. Navigate to Files>View files
2. Open the selected file
3. Select **file info** from the **file** dropdown at the left side corner.



The screenshot displays the WiselIndex web interface. On the left, a dark sidebar contains navigation options: Dashboard, Departments, Projects, Files, View Files, Upload, Fields, Views, Filter, User, and Roles. The main content area shows a document viewer for a PDF file. A 'File' dropdown menu is open, with 'File info' selected. The file information panel lists the following details:

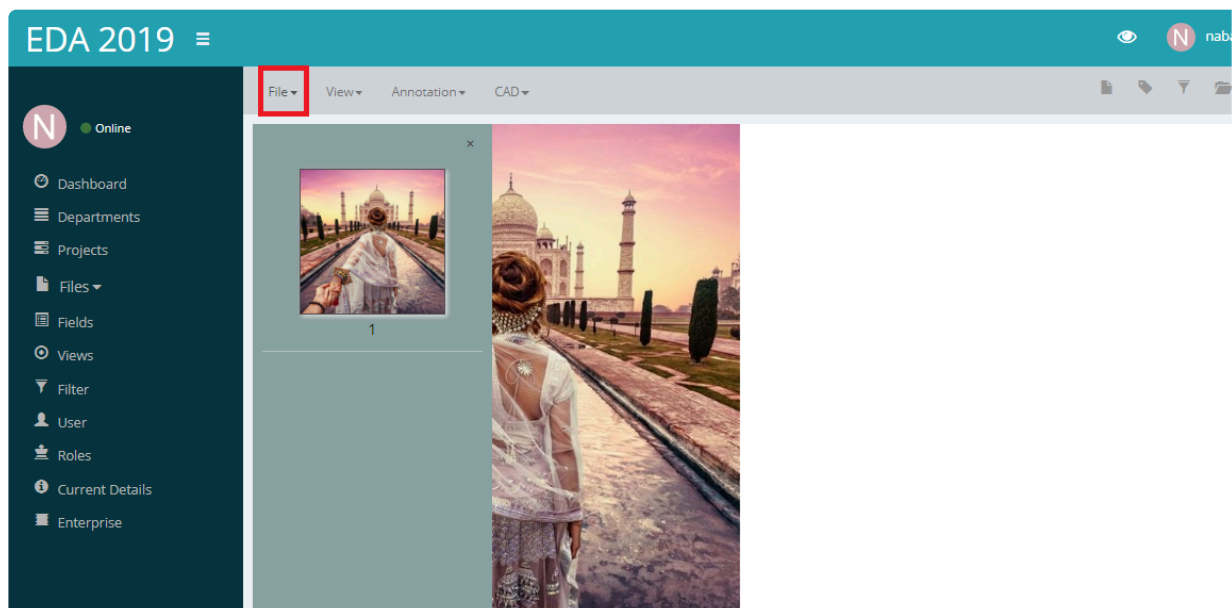
- Last Access Time: 3/30/2019 1:59:15 PM
- Last Write Time: 3/30/2019 1:59:16 PM
- File Read Only: False
- Image Width(pixels): 960
- Image Height(pixels): 720
- File Size: 3.7909 MB
- Page Count: 41
- Current Page Number: 1

The document content is titled 'g-Data Tutorial' and includes contact information for Marko Grobelnik at the Jozef Stefan Institute, Ljubljana, Slovenia, dated Stavanger, May 8th 2012.

10.2.2. 9.2.2 Navigate within multipage documents

In WiselIndex we can store documents in various formats like jpg,pdf,txt,dwg,dxf etc.A document might contains several pages.In that case we can work with multiple pages simultaneously.We can directly go to last page,first page.Below are the steps:

1. Navigate to File>View files
2. Open the file
3. Select File>Thumbnail at the left corner of the page



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Here we can see the multiple pages on the thumbnail view and we can easily choose the page we want to work on.

We can also do it by another way.

1. Navigate to File>View files
2. Open the file
3. Select View>First page/last page

10.2.3. 9.2.3 Navigate using layers

WiselIndex allows to store and modify CAD drawings. For CAD drawing we can divide the drawing into multiple layers.

1. Go to Files>View Files
2. Open the file
3. Select **CAD** on the top
4. Select **view layers**

10.2.4. 9.2.4 Search text

We can search a particular text in a CAD drawing and work on that text. This is case sensitive.

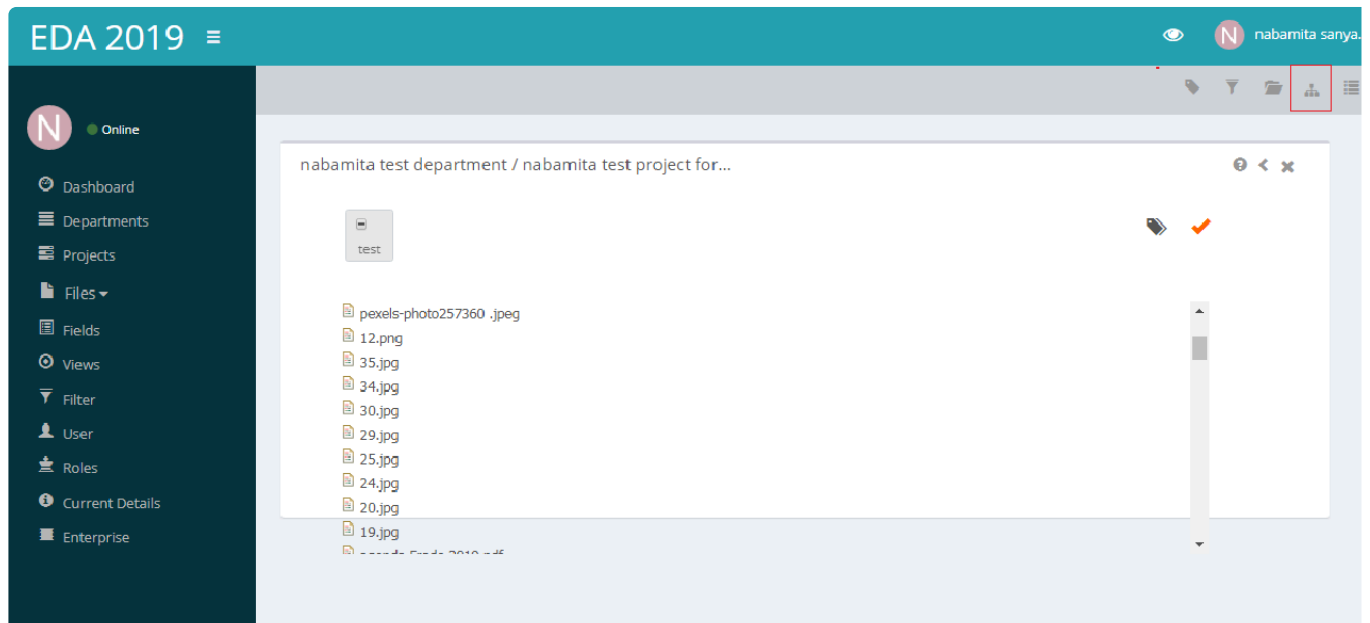
1. Open the file from view file option
2. Navigate to **CAD>Search text**

10.2.5. 9.2.5 Other viewing controls

In WiselIndex, there are various options to view a files. We can select **tree view**, **list view**, **thumbnail view**.

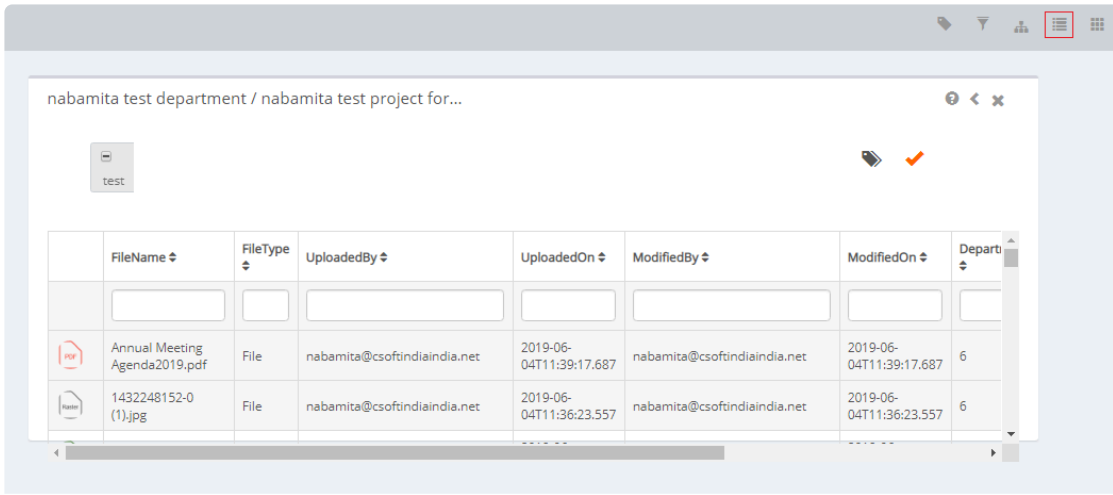
Tree view

In tree view we can view the files in folder and subfolder manner. Tree view looks like below screenshot.



List view

In list view we can view the files in list. List view looks like below screenshot.

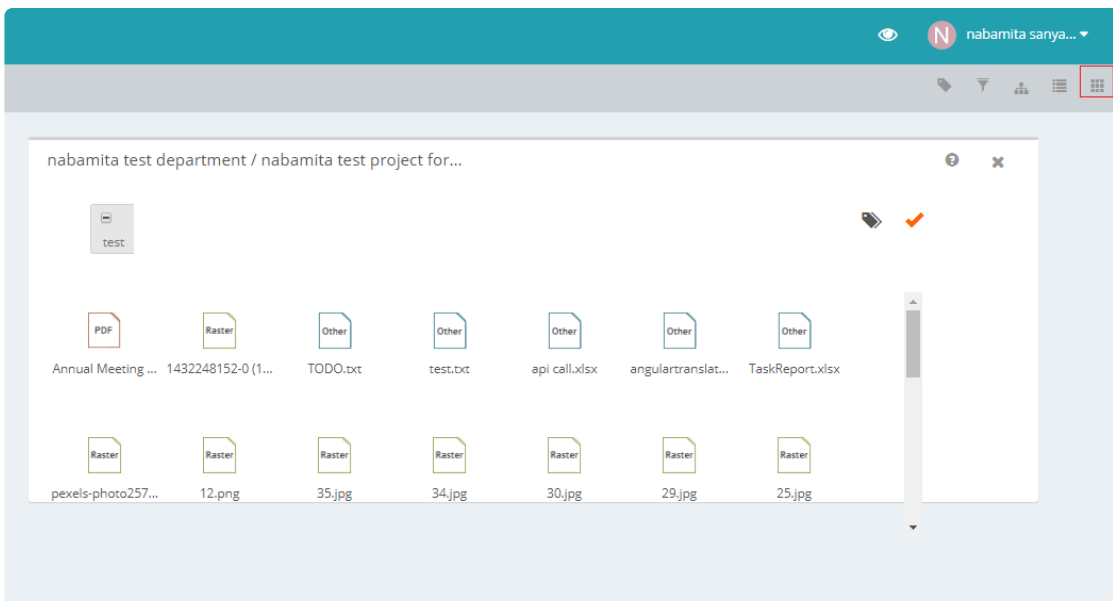


nabamita test department / nabamita test project for...

	FileName	FileType	UploadedBy	UploadedOn	ModifiedBy	ModifiedOn	Depart
	Annual Meeting Agenda2019.pdf	File	nabamita@csoftindiaindia.net	2019-06-04T11:39:17.687	nabamita@csoftindiaindia.net	2019-06-04T11:39:17.687	6
	1432248152-0 (1).jpg	File	nabamita@csoftindiaindia.net	2019-06-04T11:36:23.557	nabamita@csoftindiaindia.net	2019-06-04T11:36:23.557	6

Thumbnail view

Screenshot for thumbnail view is given below.



10.2.6. 9.2.6 Annotations

WiselIndex offers several annotations on a file. List of annotations allowed in WiselIndex are as below: (annotation pic)

Open a file

1. Click **Annotation** tab at the top.
2. Modify as per your choice. You can draw a line, rectangle, ellipse, stamp etc. After modifying the file click on **save annotation**.
3. If you want to apply the annotation click on **Load annotation**
You can also edit the annotation by clicking **Edit annotation**

10.3. 9.3 Download Files

WiselIndex allows to download a file. Below are the steps to download a file.

1. Navigate to **Dashboard>Files>View Files**.
2. Select the file you want to download. Right click on it. And Click on **Download** Option
3. Your file will be downloaded to local system

10.4. 9.4 Revisions

WiselIndex has built-in version control. When you add a new version of a file with the same name to your WiselIndex project, WiselIndex automatically updates the file and maintains a record of all previous versions.

We will cover the following operations in this section.

[1. upload a new version](#)

[2. View earlier revisions](#)

10.4.1. 9.4.1 Upload a new version

WiselIndex allows you to modify a file and upload the same file. In that case, the old file goes to revision part and the modified file is stored as current version. Here are the steps:

1. Select the file and right click on it
2. Select **upload a new version**

10.4.2. 9.4.2 View earlier revisions

To view a preview of a revision's content,

1. Open the file.
2. Select the revision tab. This shows a preview of any file at any revision.version of the file.

10.5. 9.5 Related files

The related files feature in WiselIndex provides users access to the supporting and related files that are associated with the file they are working on. In that case user does not need to search a file from a bunch of files.

For example, if a pdf file is associated with the main file, this feature facilitates viewing and editing this pdf file. The user can also view the main file while editing the related file.

How to upload related file?

To upload a related file right click on the file, and select **upload related file**.

How to get related file list?

To get related file list, open the file and select **Related files** tab at the top of the page.

10.6. 9.6 Tasks Against a File

10.7. 9.7 File History

10.8. 9.8 File Operations

11. 10. Fields

Fields in WiselIndex offers an unique identification method for searching files.It helps to search a particular file from a chunk of files in WiselIndex.If we create a field with a field value and assign the field to a file,then we can easily search the file using the field value.We can create two kinds of field here.Details will be discussed in the next chapters.

Following are the subtopics covered in this chapter:

* [10.1 Field types](#)

* [10.2 Add Fields](#)

* [10.3 View/Edit Fields](#)

* [10.4 Active/Inactive Field](#)

11.1. 10.1 Field Types

In WisIndex we can create several types of fields. The fields types available in WisIndex are String Field, Decimal Field, Integer field, Lookup field, Date field, Date-time field. For each type of field we can input a default value. If we do not assign any value to a field, then it will take the default value.

Field value can be as follows:

Integer field: Any integer value like 1,2,3.....

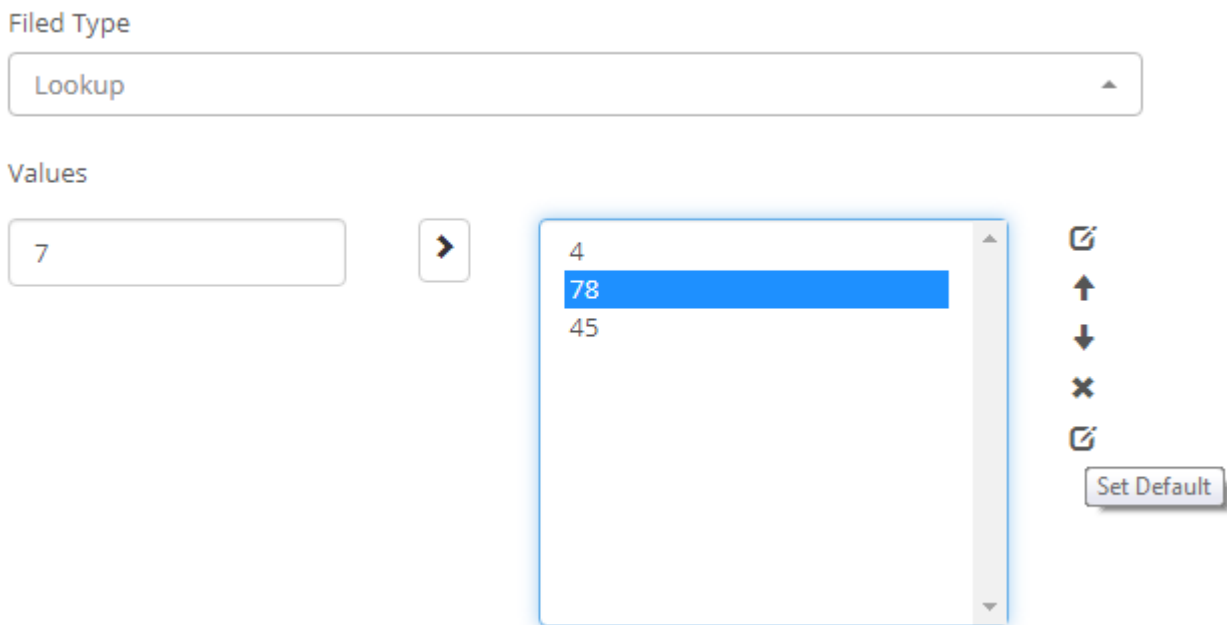
Decimal Field : Decimal value like 1.0,1.5.....

String field Any string value like "abcd", "1234".

Date field: Date value in MM/DD/YYYY Format like 02/26/2019

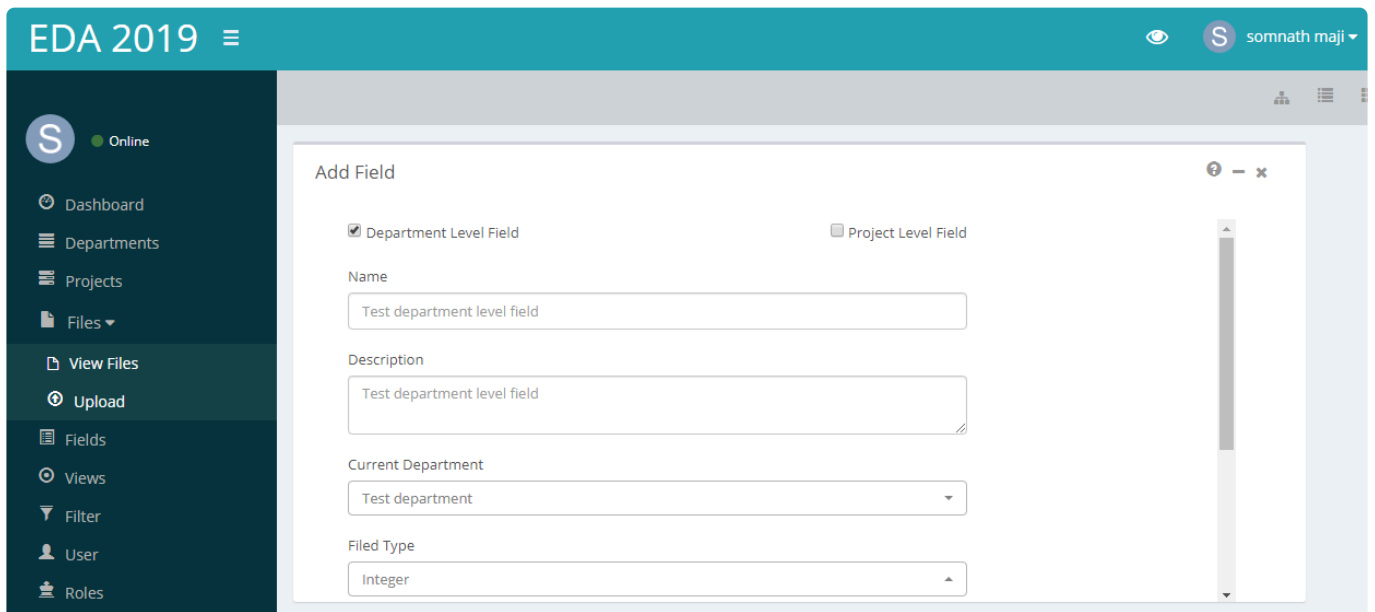
Date-time field: Date and time value in MM/DD/YYYY 00:00 Format like 03/26/2019 17:35

Lookup field: It will take a lookup list values. We can make a value as default value from the lookup value list. We can also edit a lookup value if necessary. Below is the screenshot for lookup field.



11.2. 10.2 Add Fields

In WiselIndex we can add two kinds of field. One is project level field and another one is Department level field. A project level field will be applicable for all the files in a project. And a department level field will be applicable for all the project in a department. For a department level field we don't need to create field for projects separately. It will be applicable for all the projects under a department. The required fields to add a Field are : **Field name**, **Field description** and **Field type**,. Once we fill up the form properly, we can create Field.



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License

Default value

If we check the option **This field is mandatory**, then we have to input a default value for the field type selected.

Filed Type

Integer

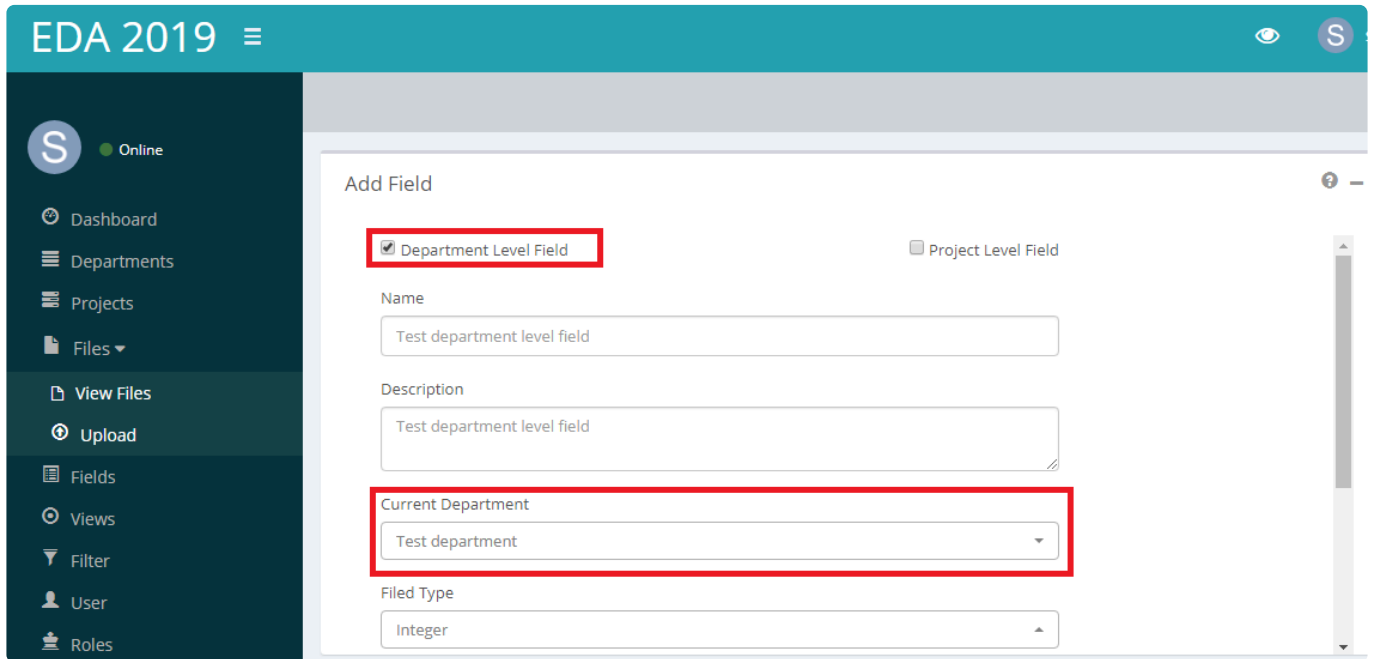
This field is mandatory

Cancel

save

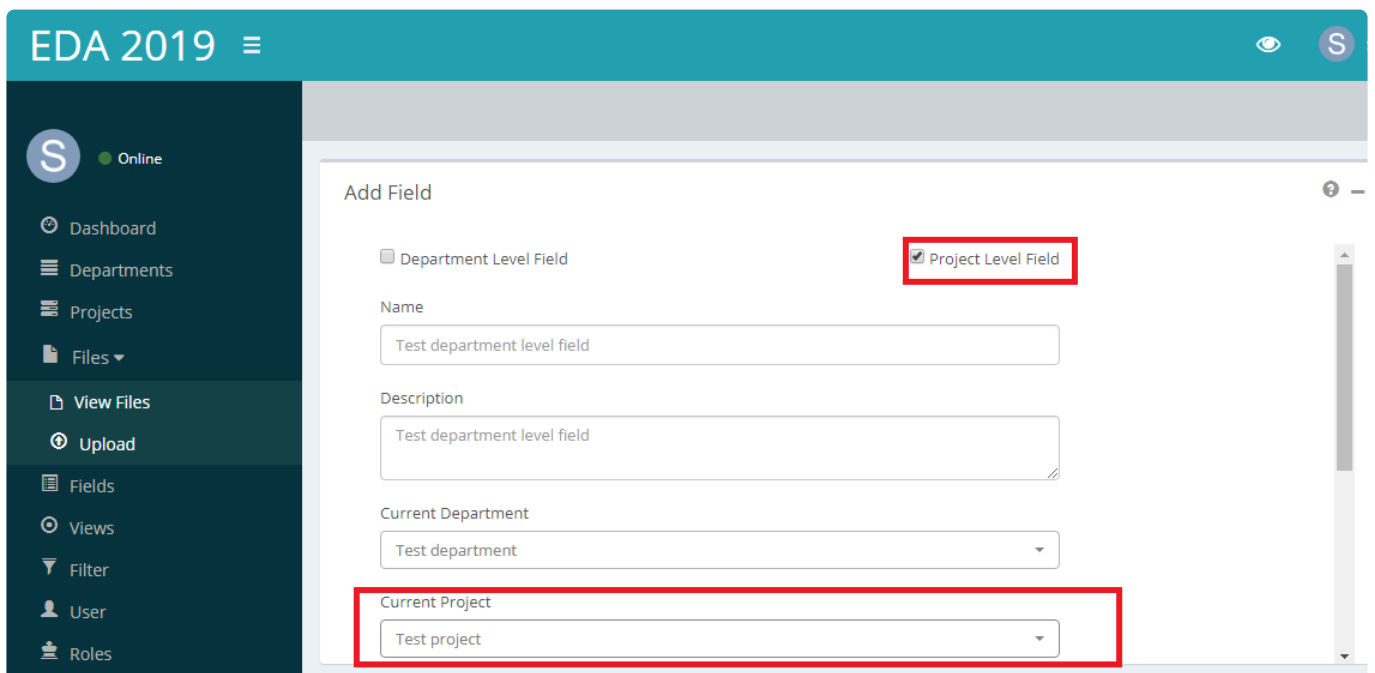
Department level field

If we want to create a **Department level field** then we have to check the option **Department level field**. In this case **Current department** is mandatory.



Project level field

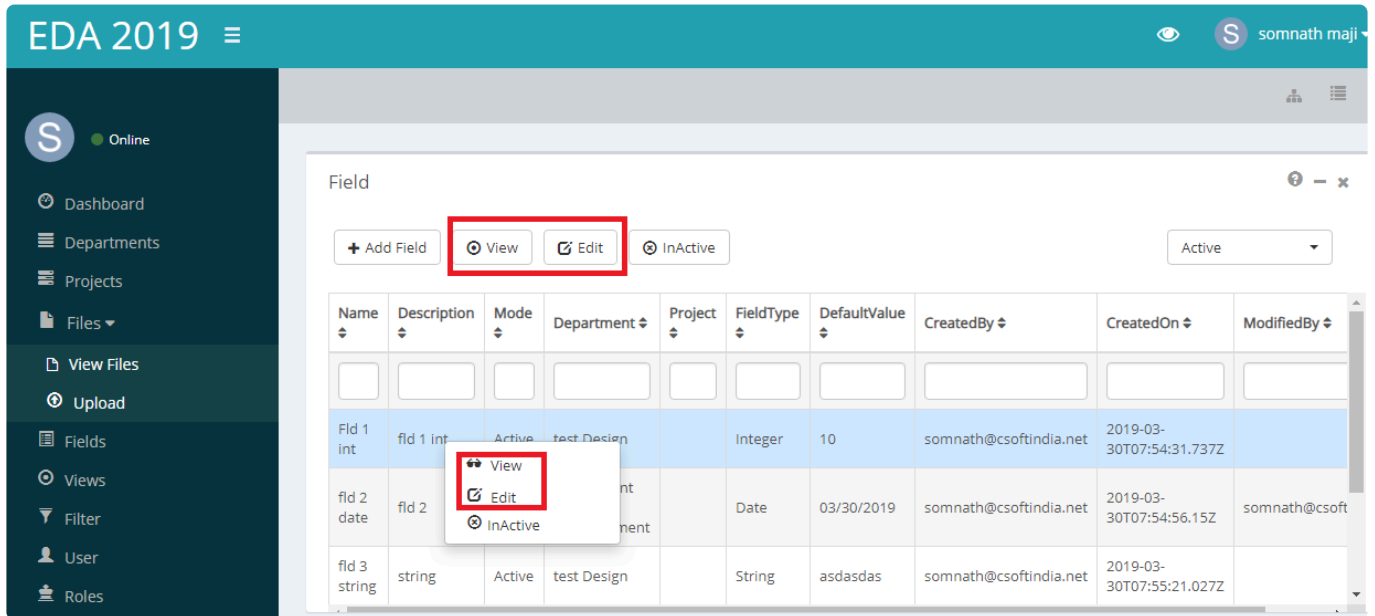
If we want to create a **Project level field** then we have to check the option **Project level field**. In this case **Current department** and **Current project** is mandatory.



11.3. 10.3 View/Edit Fields

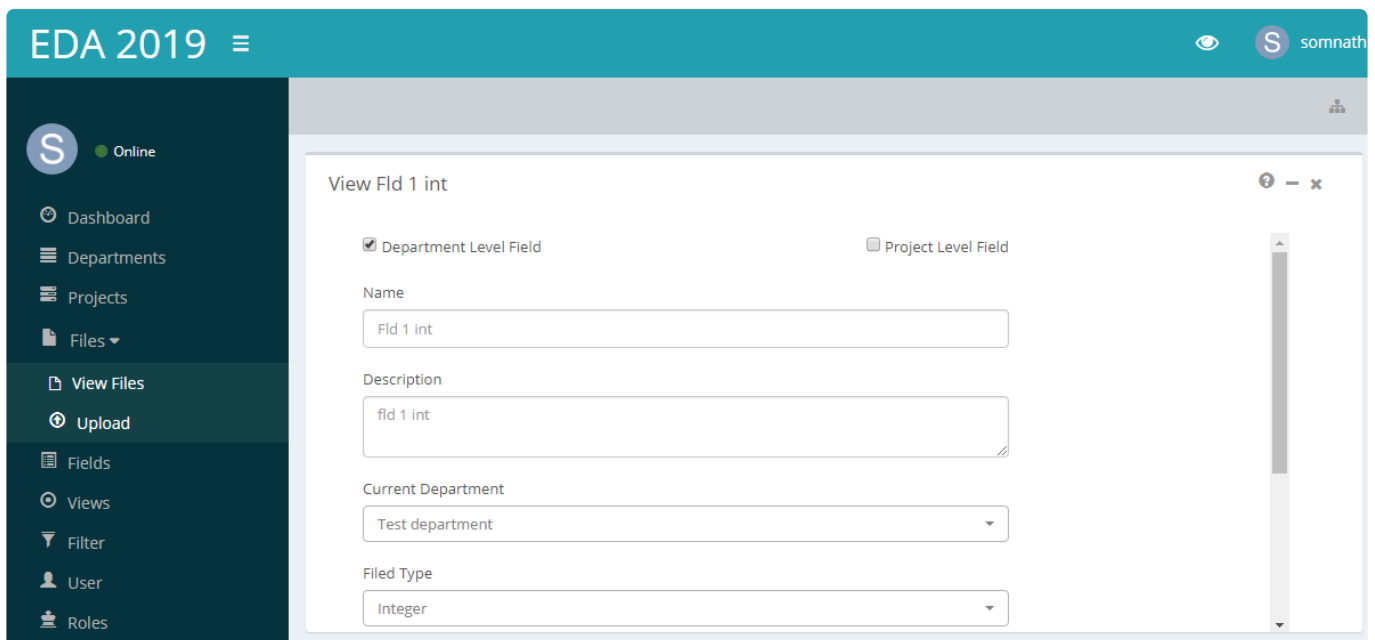
A Field can be viewed or edited by two alternative options. User can either select the field by left click of the mouse button. The **edit/view** are then listed as buttons on top of the list control.

User can also right click on the field name and **edit/view** options are then listed as the context menu.



View Field:

In this section we can only view a saved field can not edit the field.



Edit Field:

A saved field can be edited here. We can change the **Field name, Description** only. But we can not change **Current department, Current project, Field type** and **Default value**.

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S Online

- Dashboard
- Departments
- Projects
- Files ▾
- View Files**
- Upload
- Fields
- Views
- Filter
- User
- Roles

Edit Fld 1 int ⊕ - ✕

Department Level Field Project Level Field

Name

Description

Current Department

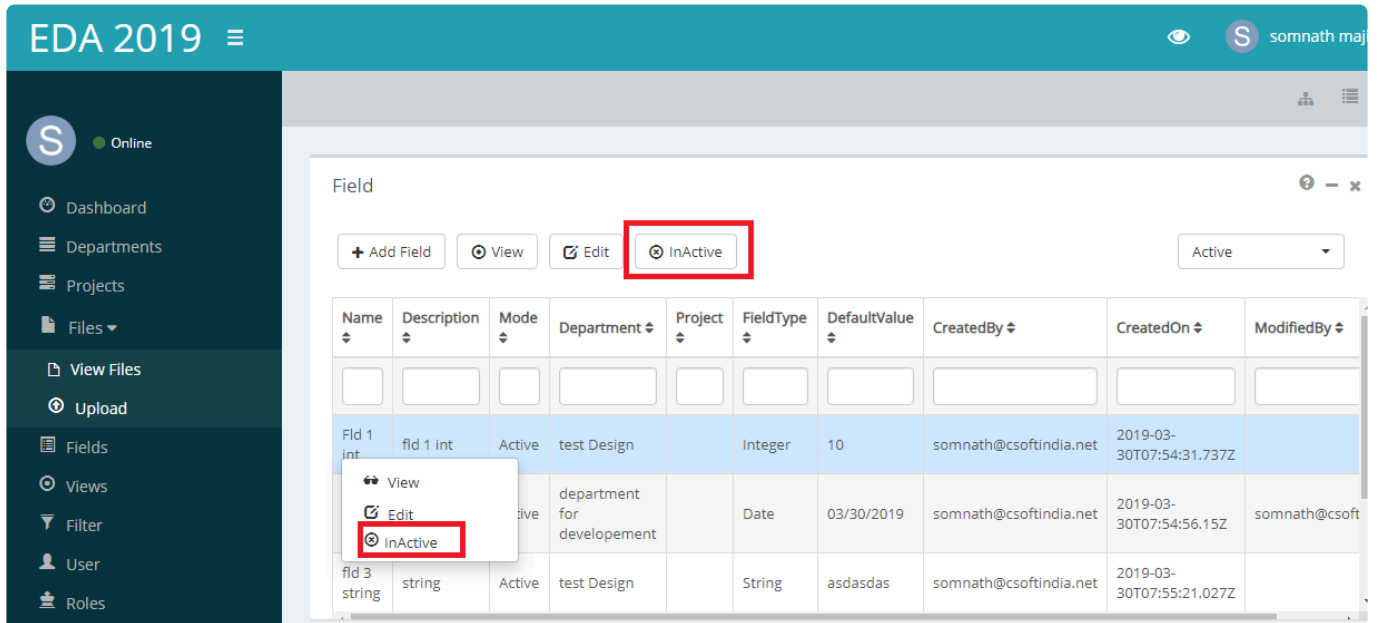
Filed Type

Copyright ©CSoft AS.2018

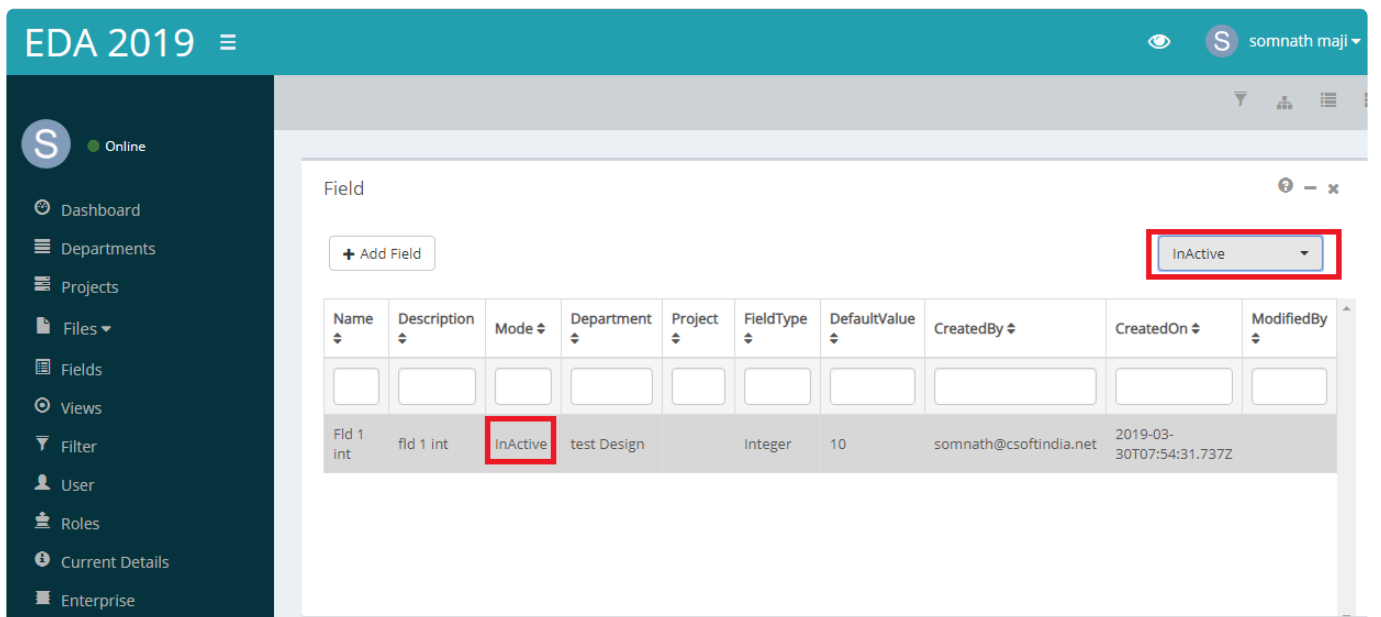
11.4. 10.4 Active/Inactive Fields

A Field can not be deleted, it can be made **inactive** by **InActive** option. To access the option, the user has two alternative options. User can either select field by left click of the mouse button. The **InActive** option is then listed as buttons on top of the list control.

User can also right click on the Field and **InActive** option is then listed as the context menu.



If a field is made inactive then it will go to the inactive list. And we can view the inactive list of fields by selecting **InActive** option from the drop down list at the right side corner of the page.



12. 11. Filters

A filter restricts what records appear in a list by providing a set of conditions. A condition consists of the following parts.

Field: Each field contains some value.

Operator: Each field type has its own set of valid operators. Like greater than, less than, equals to etc

Value: Each field has its own set of values determined by the field type.

Grouping: Each condition line is grouped with an **AND** connector. The filter requires all condition lines linked with an AND connector to be met. We can Create, Edit, and Delete filters.

Following are the subtopics covered in this chapter:

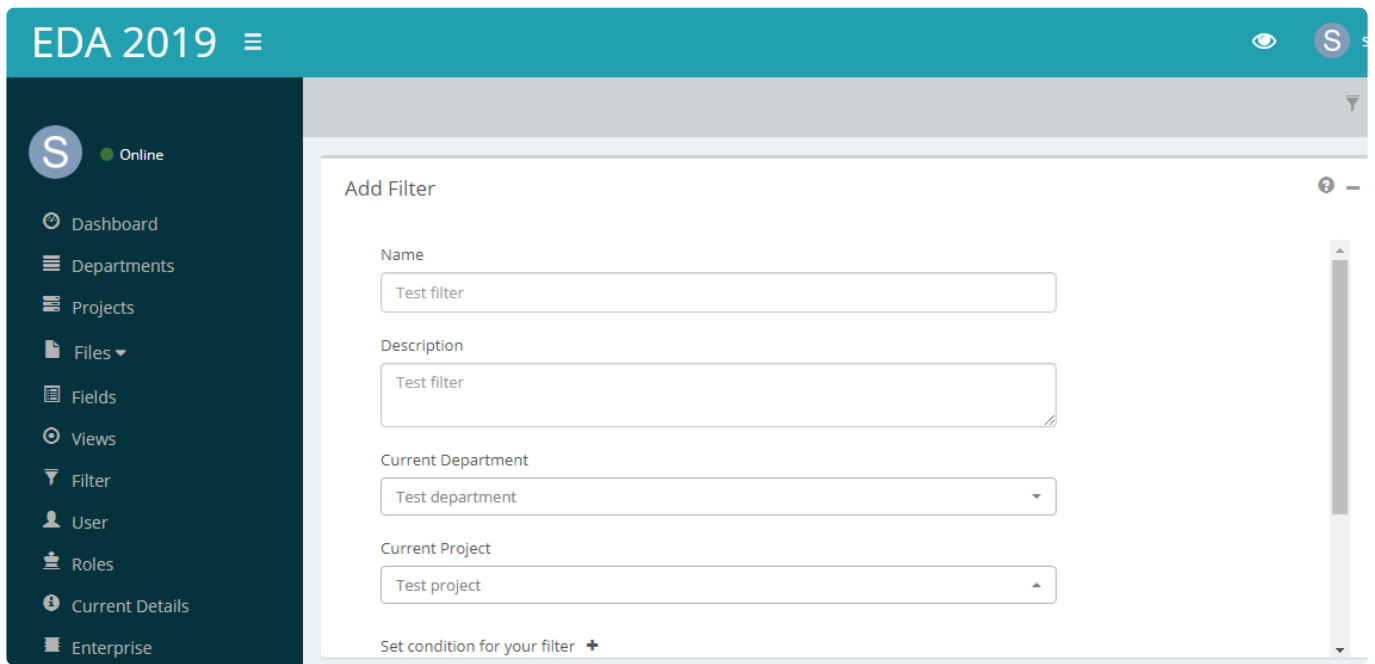
- [11.1 Add Filters](#)
- [11.2 View/Edit Filters](#)
- [11.3 Delete Filters](#)

12.1. 11.1 Add Filters

We have to navigate to Filter option from the dashboard to create a filter. The mandatory fields are **Filter name, Filter description, Current department, Current projects** and at least one **condition**.

To create a filter, complete the following steps.

1. Enter a Title
2. Enter a filter description
3. Select Current department from the drop down list
4. Select current project from the dropdown list.
5. Add filter conditions.
6. Click add filter



To add a filter condition, complete the steps

- Select a field from drop down list.
- Select an operator.
- Give a field value.

Set condition for your filter +

Select Field

Set Condition

Set Value

Test field

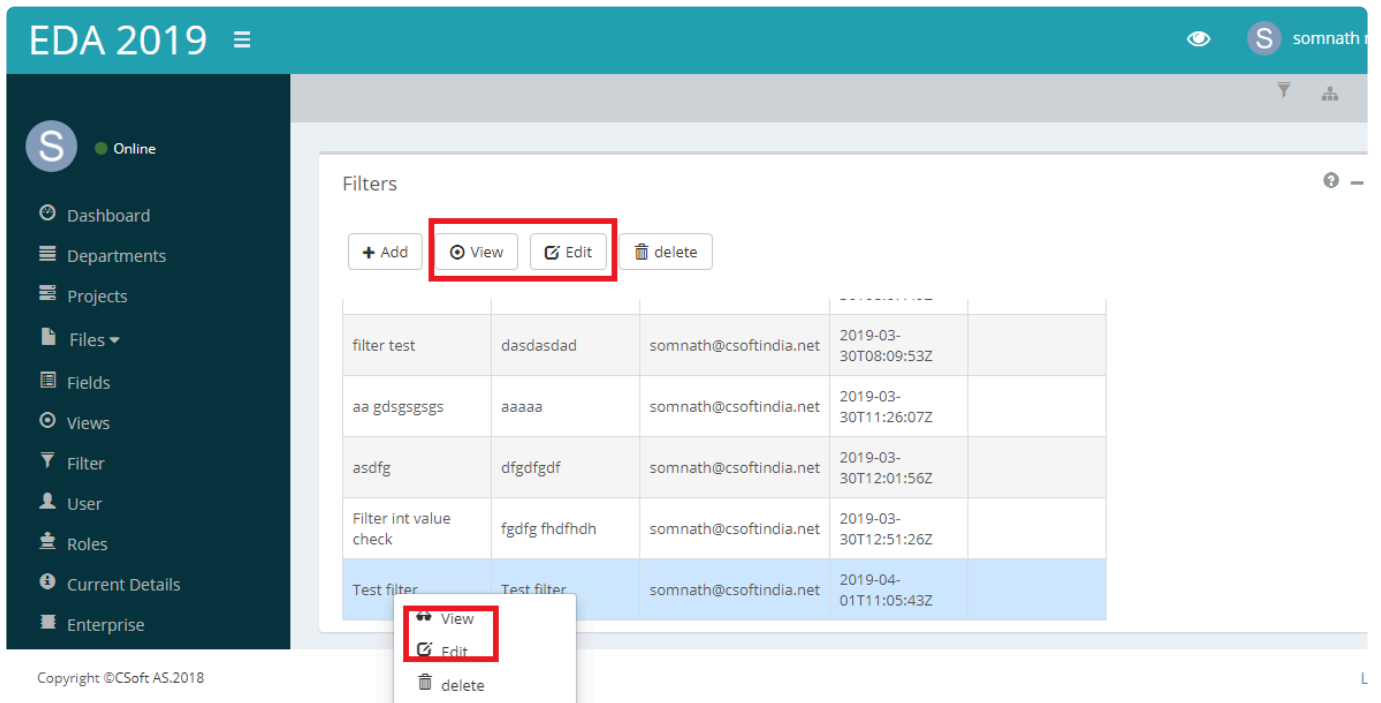
Greater Than

5

12.2. 11.2 View/Edit Filters

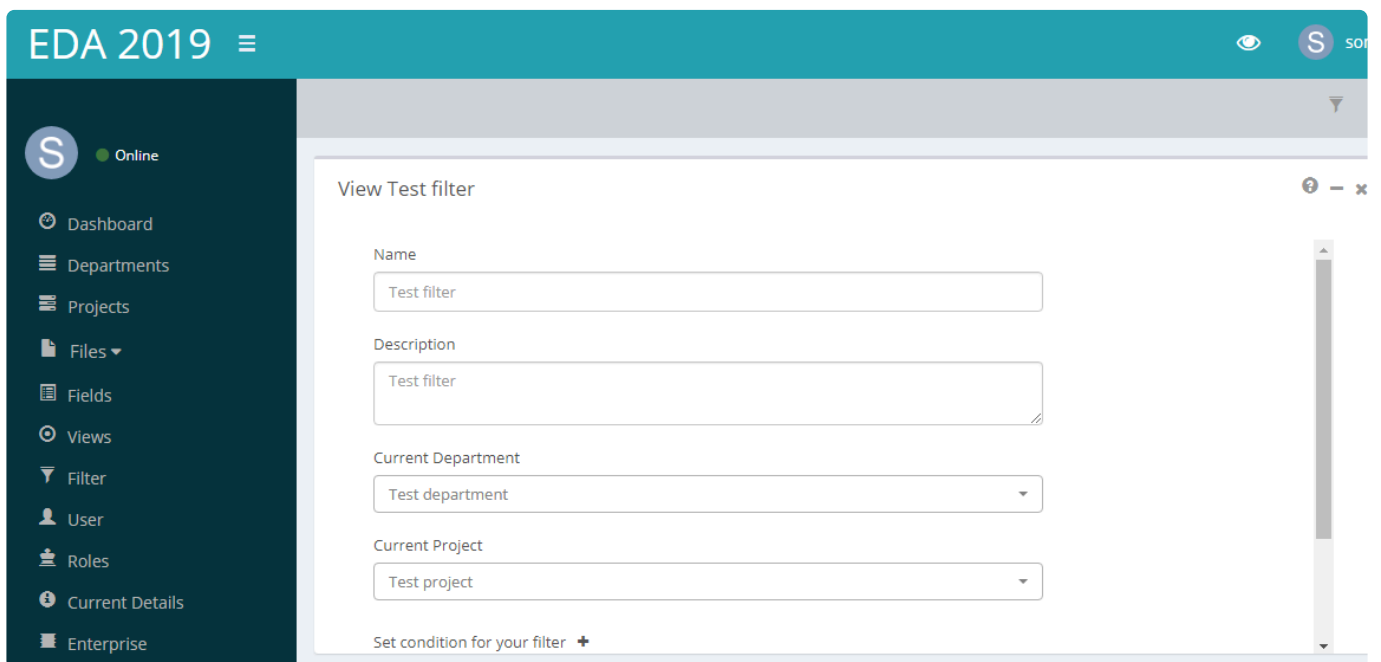
A Filter can be viewed or edited by two alternative options. User can either select the Filter by left click of the mouse button. The **edit/view** are then listed as buttons on top of the list control.

User can also right click on the Filter name and **edit/view** options are then listed as the context menu.



View Filter:

In this section we can only view a saved filter.can not modify the filter.

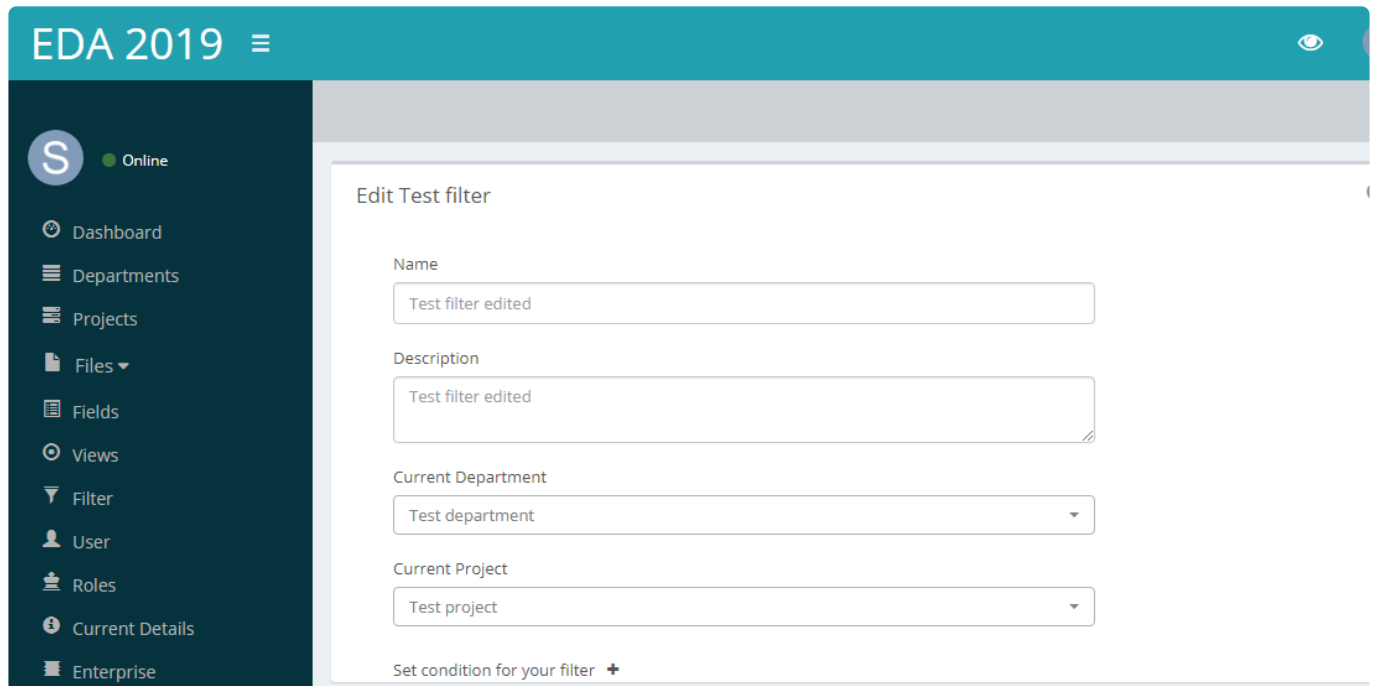


Edit Filter:

To edit a saved filter, select the filter to edit and complete the following steps.

- Modify the filter name and description as necessary.
- Modify the Filter conditions as necessary.
- Click Save.

Note:We can not edit the **Current department** and **Current project**.



The screenshot displays the 'Edit Test filter' interface within the EDA 2019 application. The interface is divided into a sidebar and a main content area. The sidebar, on the left, contains a navigation menu with the following items: Dashboard, Departments, Projects, Files, Fields, Views, Filter (highlighted), User, Roles, Current Details, and Enterprise. The main content area, on the right, is titled 'Edit Test filter' and contains the following fields:

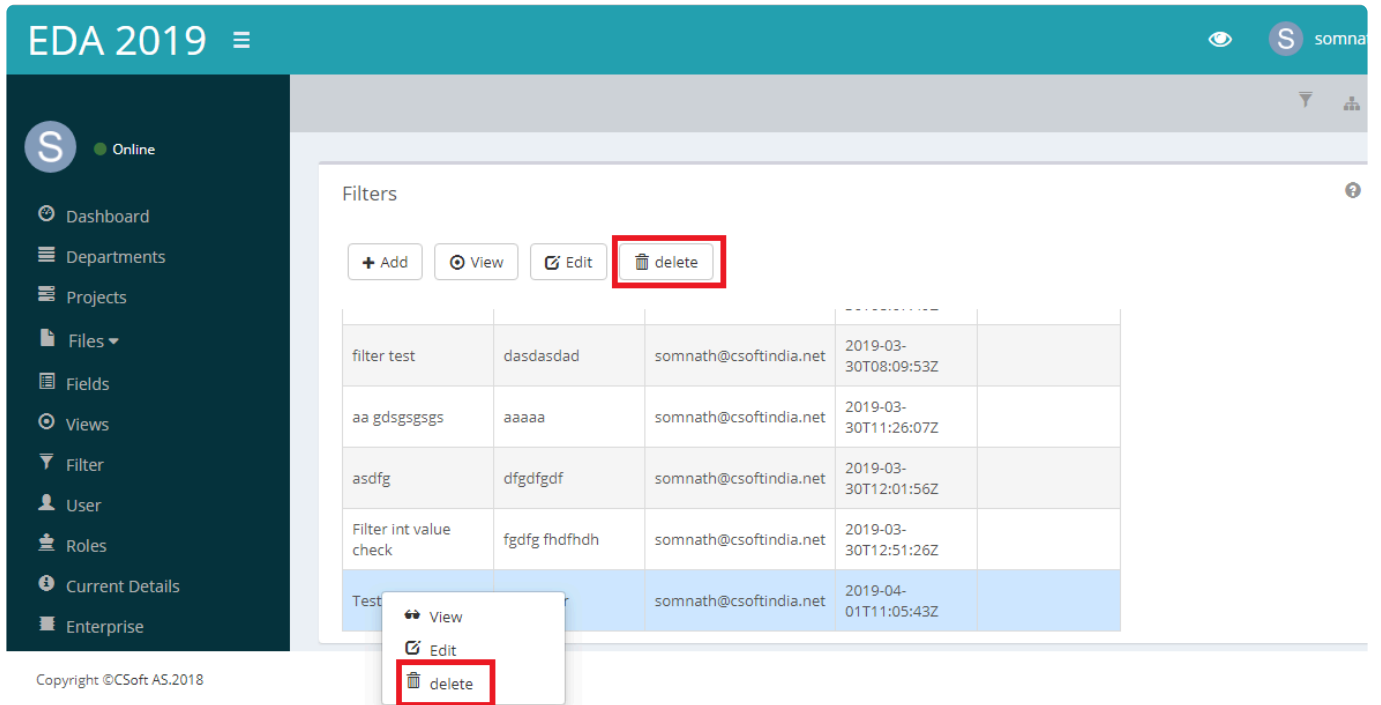
- Name:** A text input field containing 'Test filter edited'.
- Description:** A text input field containing 'Test filter edited'.
- Current Department:** A dropdown menu with 'Test department' selected.
- Current Project:** A dropdown menu with 'Test project' selected.

At the bottom of the form, there is a button labeled 'Set condition for your filter +'. The top of the application window shows the header 'EDA 2019' and a user profile icon.

12.3. 11.3 Delete Filters

A filter can be deleted by two alternative options. User can either select the filter by left click of the mouse button. The **Delete** option is then listed as buttons on top of the list control.

User can also right click on the filter name and **Delete** options are then listed as the context menu.



To delete the filter just select the filter name and click on **Delete** button. The deleted filter will no longer appear on the list.

12.4. 11.4 Temporary filter

Temporary filter allows to search files without saving a filter. To apply a temporary filter,

Navigate to Files>view files

Select **quick search** at the top right corner of the page.

Add filter condition

Quick Search

Set condition for your filter +

Select Field

Set Condition

Set Value

Cancel

Search

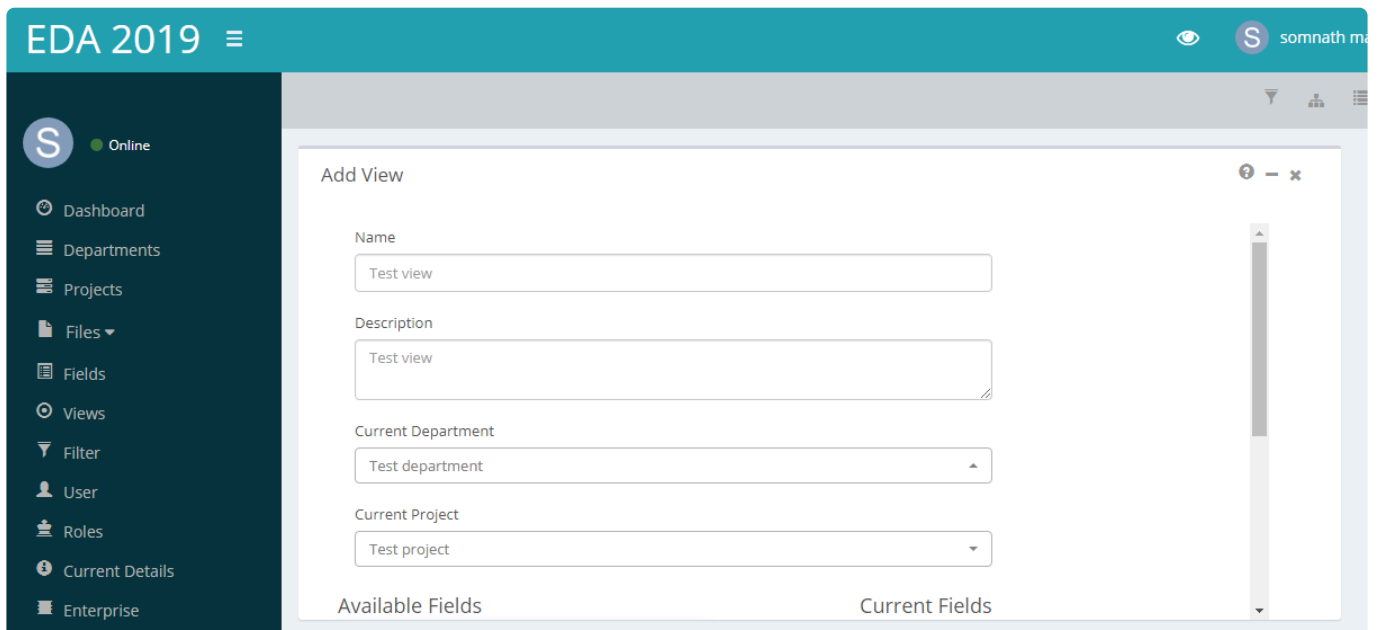
13. 12. Views

13.1. 12.1 Add Views

We have to navigate to View option from the dashboard to create a View. The mandatory fields are **View name, View description, Current department, Current projects** and at least one **Available Fields**.

To create a View, complete the following steps.

1. Enter a Title
2. Enter a View description
3. Select Current department from the drop down list
4. Select current project from the dropdown list.
5. Add Fields from the list
6. Click add



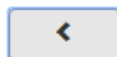
Copyright ©CSoft AS 2018

11

Available Fields

Test field

A B C D E F G H I J K L M N O P Q R S T



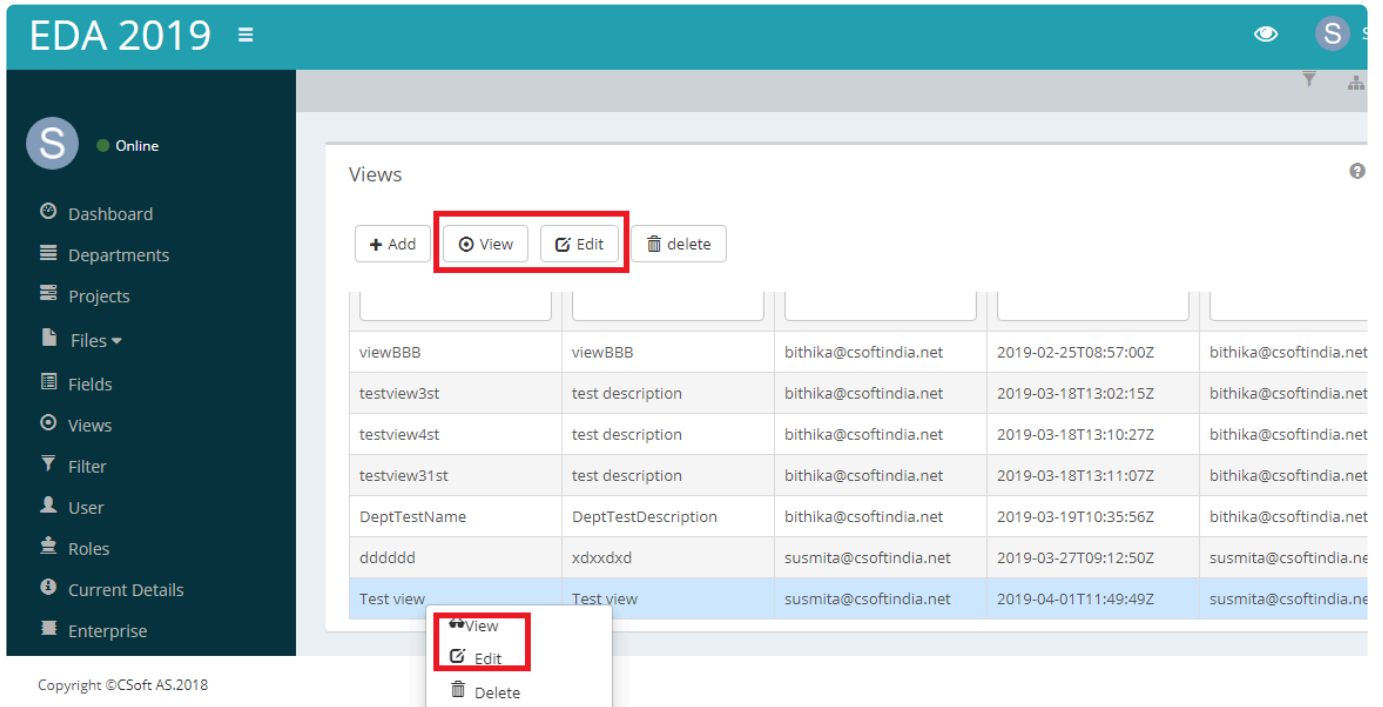
Current Fields

A B C D E F G H I J K L M N O P Q R S T

13.2. 12.2 View/Edit Views

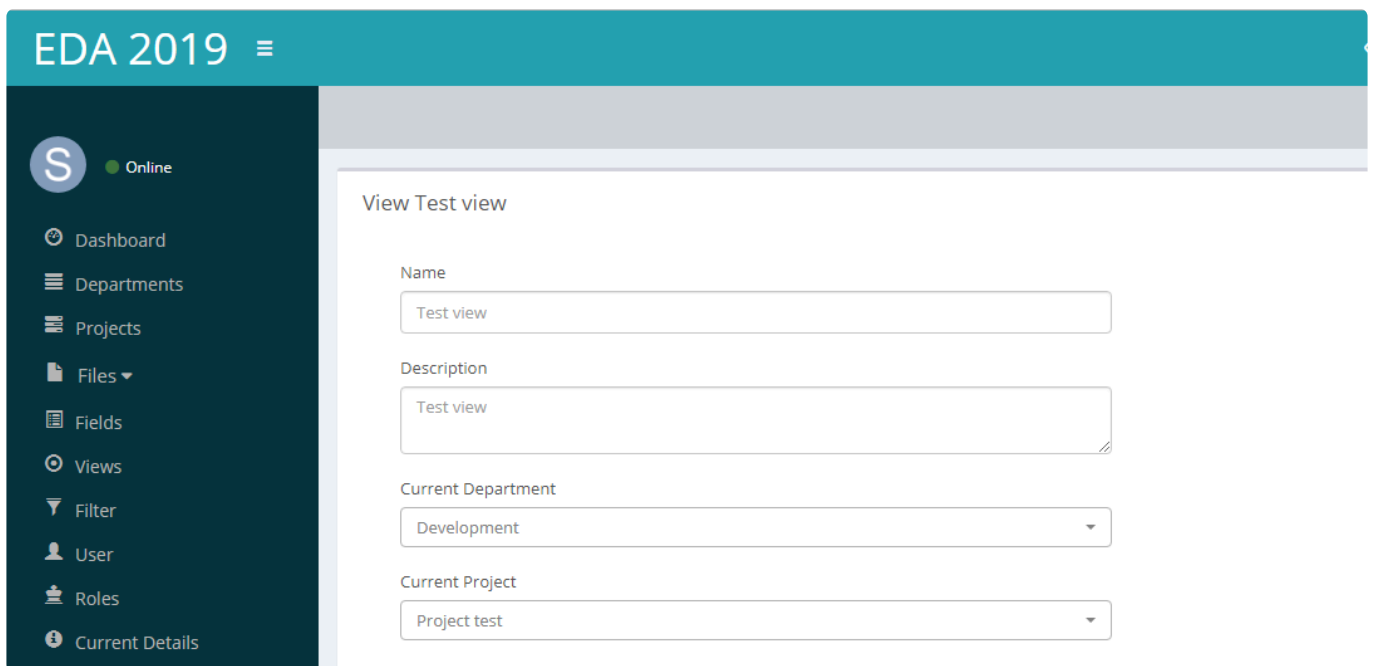
A View can be viewed or edited by two alternative options. User can either select the View by left click of the mouse button. The **edit/view** are then listed as buttons on top of the list control.

User can also right click on the View name and **edit/view** options are then listed as the context menu.



View Views:

In this section we can only view a saved View.can not modify the View.



Edit Views:

To edit a saved View, select the view to edit and complete the following steps.

- Modify the View name and description as necessary.
- Modify the Field list as necessary.
- Click Save.

We can not edit the **Current department** and **Current project**

The screenshot shows the 'Edit Test view' form in the EDA 2019 application. The form is located in the main content area, and the left sidebar contains navigation options. The form fields are as follows:

- Name:** A text input field containing 'Test view edited'.
- Description:** A text input field containing 'Test view edited'.
- Current Department:** A dropdown menu with 'Development' selected.
- Current Project:** A dropdown menu with 'Project test' selected.

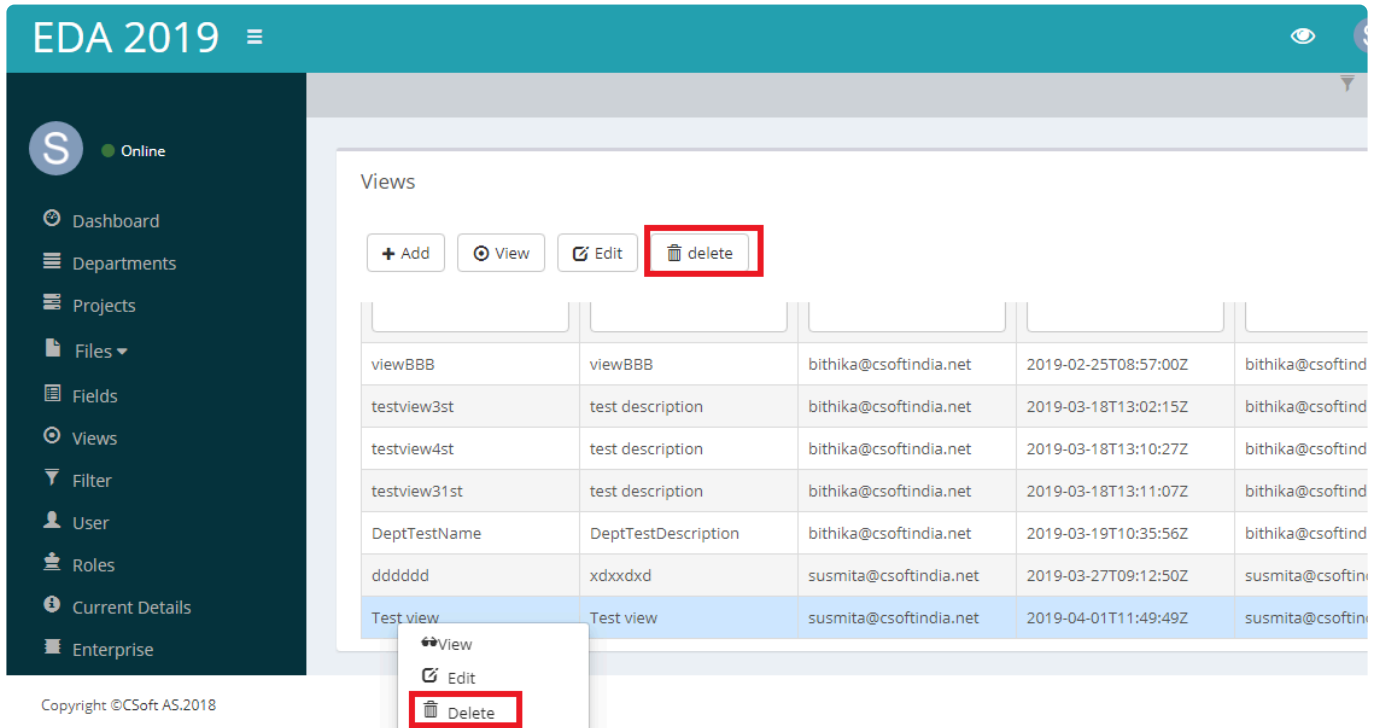
The left sidebar contains the following navigation items:

- Dashboard
- Departments
- Projects
- Files
- Fields
- Views
- Filter
- User
- Roles
- Current Details

13.3. 12.3 Delete Views

A View can be deleted by two alternative options. User can either select the view by left click of the mouse button. The **Delete** option is then listed as buttons on top of the list control.

User can also right click on the View name and **Delete** options are then listed as the context menu.

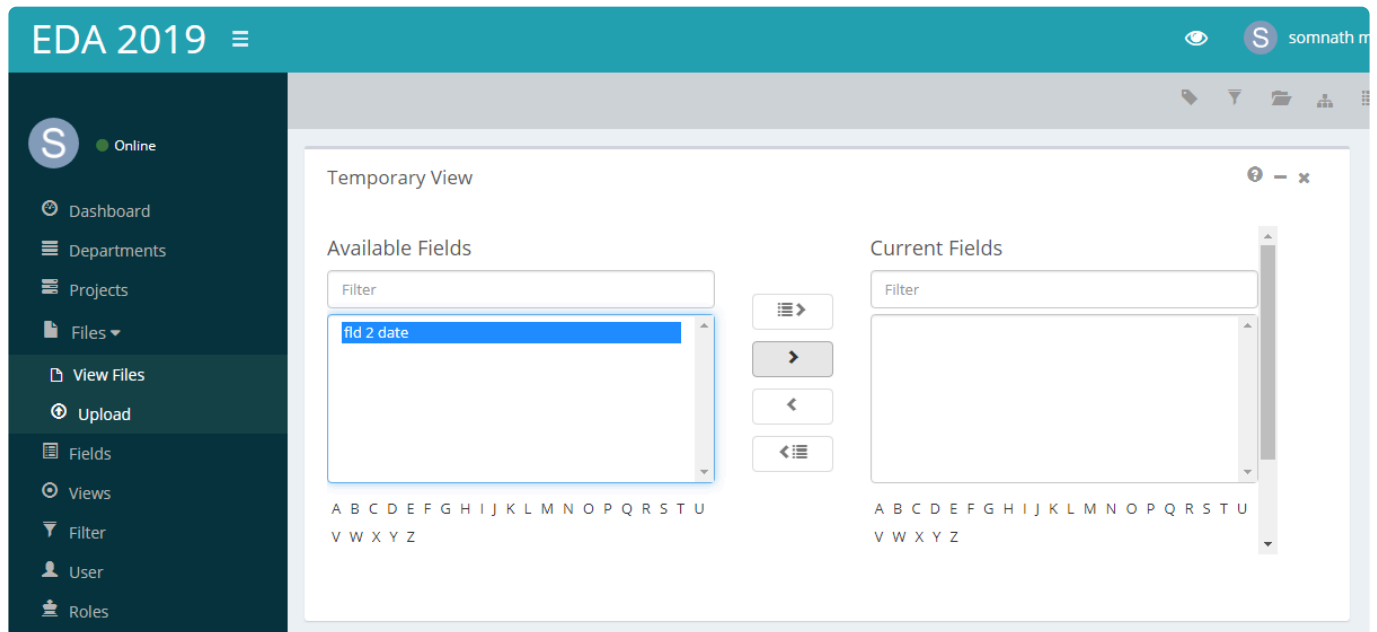


To delete the view just select the View name and click on **Delete** button.

13.4. 12.4 Temporary view

Temporary view allows user to search a file without saving view. User can create a temporary view with some field. The fields will be applicable to that file. To create a temporary view, complete the steps:

1. Navigate to Dashboard>Files>View files
2. Open a file
3. You can see a logo for quick view at the right hand side(quick view logo)
4. Add the fields in the list
5. Selected fields will be applicable to the selected file.

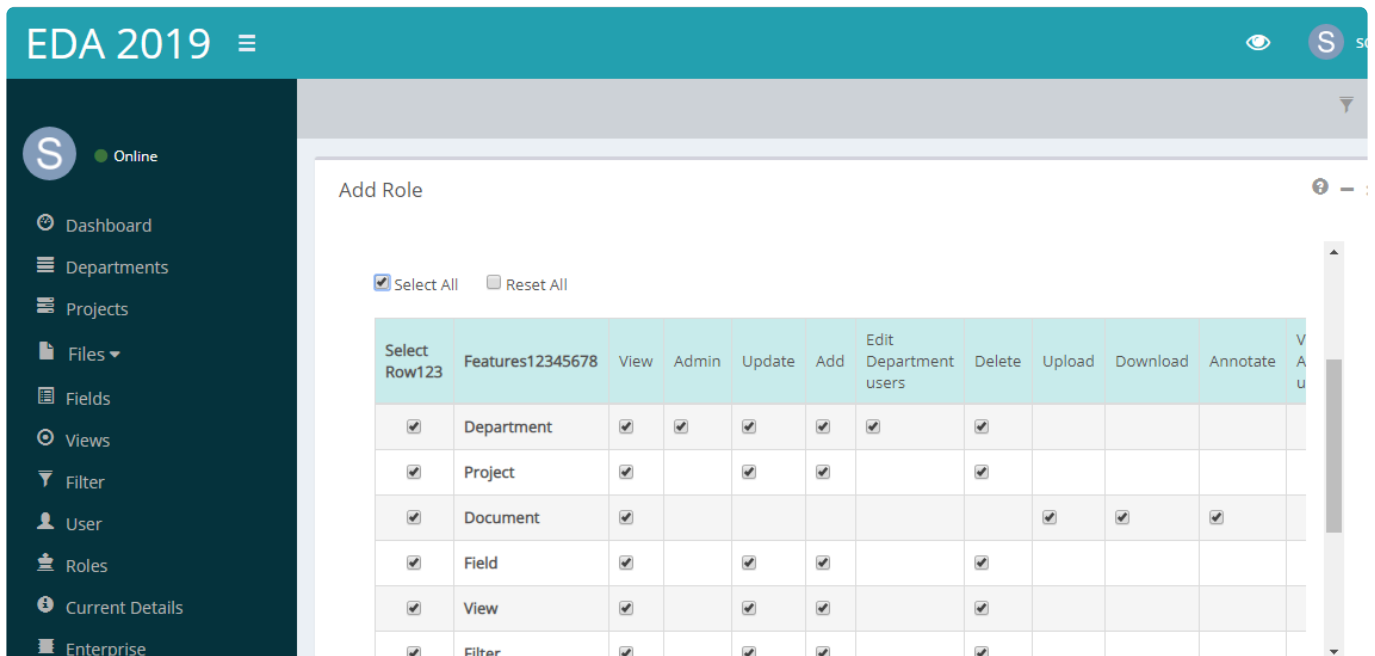
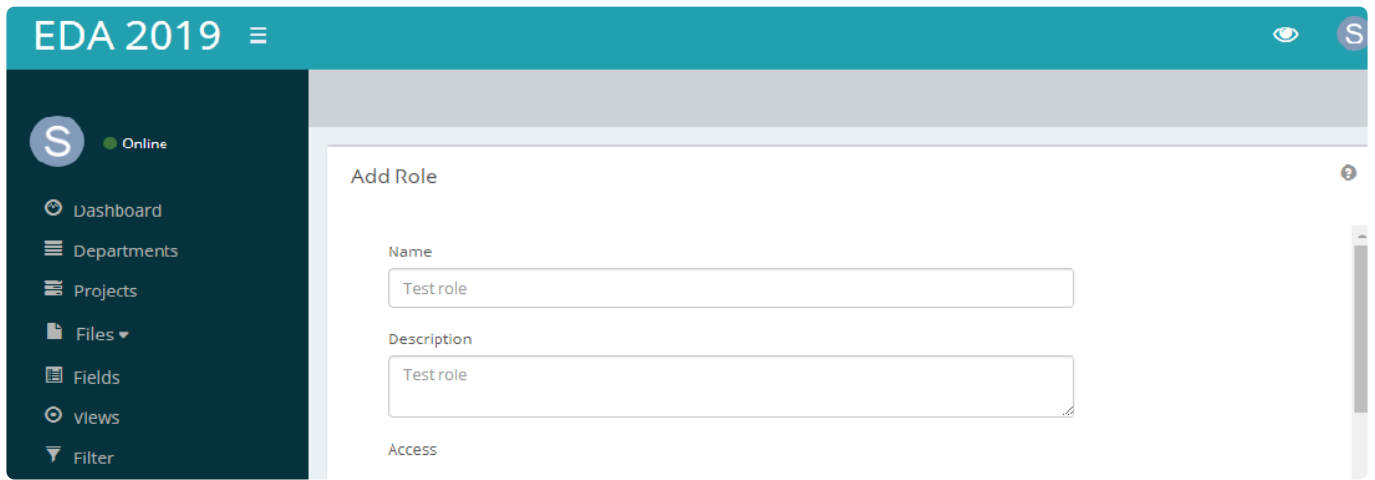


14. 13. Reports

14.1. 13.1 Create Report

We can create a role to control access to modules. The new role does not have access to any module until you add access to it. Below are the basic steps for creating a role.

1. Enter a Title
2. Enter a role description
3. Select Current department from the drop down list
4. Select Access. We can assign access by two alternative options. We can either select all access to a role or we can assign multiple access selectively.
5. Click Save



14.2. 13.2 View/Edit Reports

14.3. 13.3 Delete Report

14.4. 13.4 Preview/Multiview Reports

15. 14. Tasks

15.1. 14.1 Create Task

15.2. 14.2 View/Edit Task

15.2.1. 14.2.1 View Task Information

15.2.2. 14.2.2 Associated Files

15.2.3. 14.2.3 Task History

15.2.4. 14.2.4 Task Comments

16. 15. Users and Roles

WiselIndex offers Security of applications against unauthorized access by roles. After access has been granted to a role, all the users assigned to the role are granted the access. We can assign selective access to an user. An user can only create another role and user if he/she has access to it.

Following are the subtopics covered in this chapter:

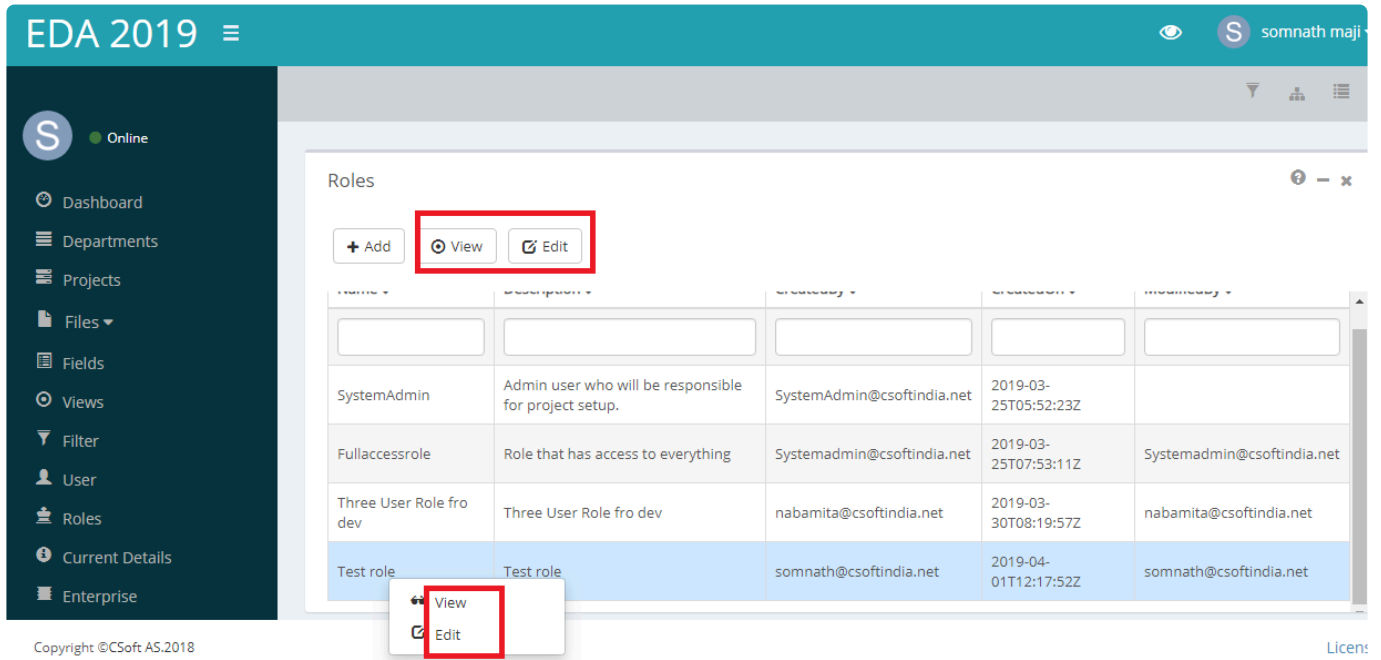
- [13.1 Create roles](#)
- [13.2 View/Edit roles](#)
- [13.3 Add Users](#)
- [13.4 View/Edit Users](#)
- [13.5 Active/Inactive User](#)
- [13.6 Edit profile](#)

16.1. 15.1 Create Roles

16.2. 15.2 View/Edit Roles

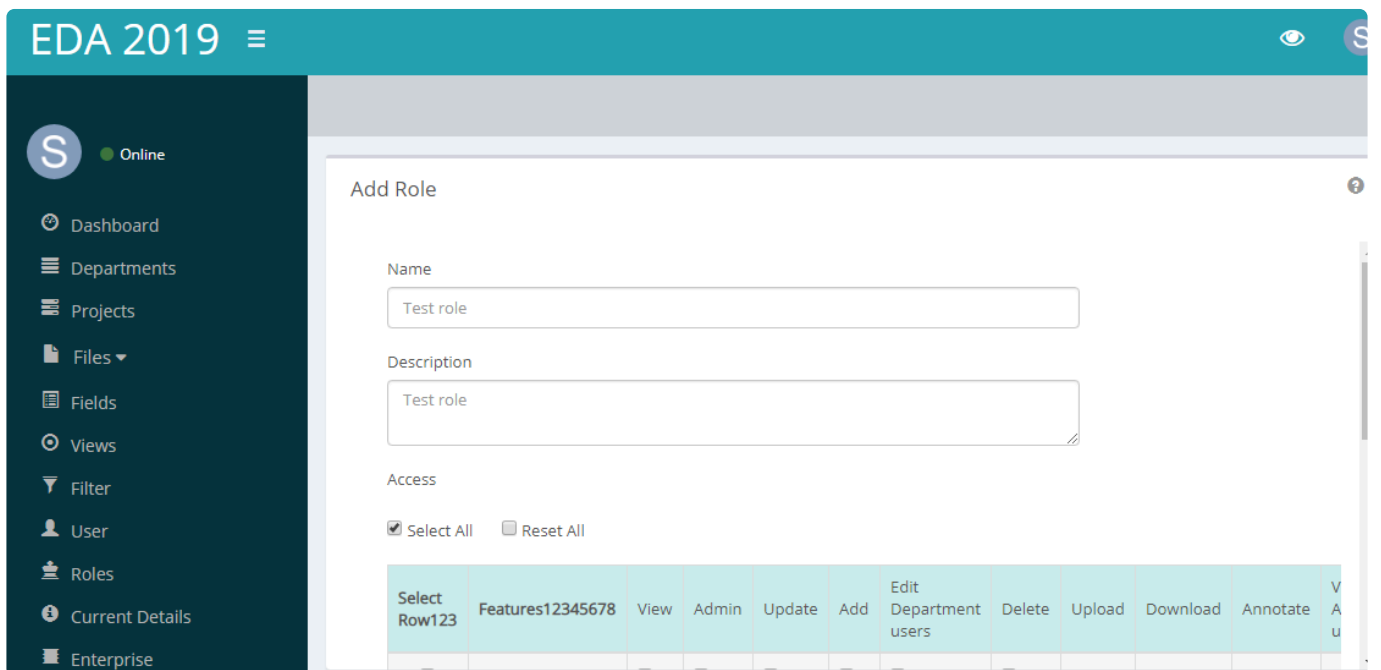
A Role can be viewed or edited by two alternative options. User can either select the Role by left click of the mouse button. The **edit/view** are then listed as buttons on top of the list control.

User can also right click on the Role name and **edit/view** options are then listed as the context menu.



View Role:

In this section we can only view a saved role.can not modify the role.

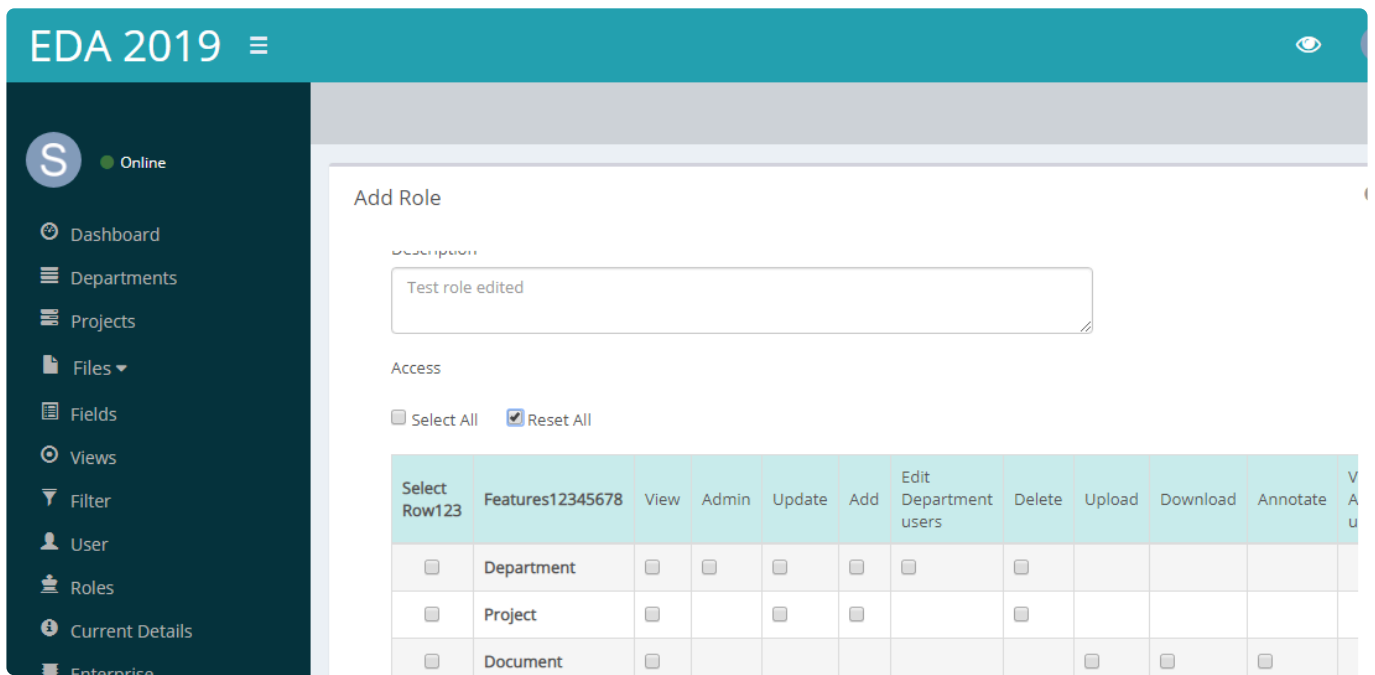
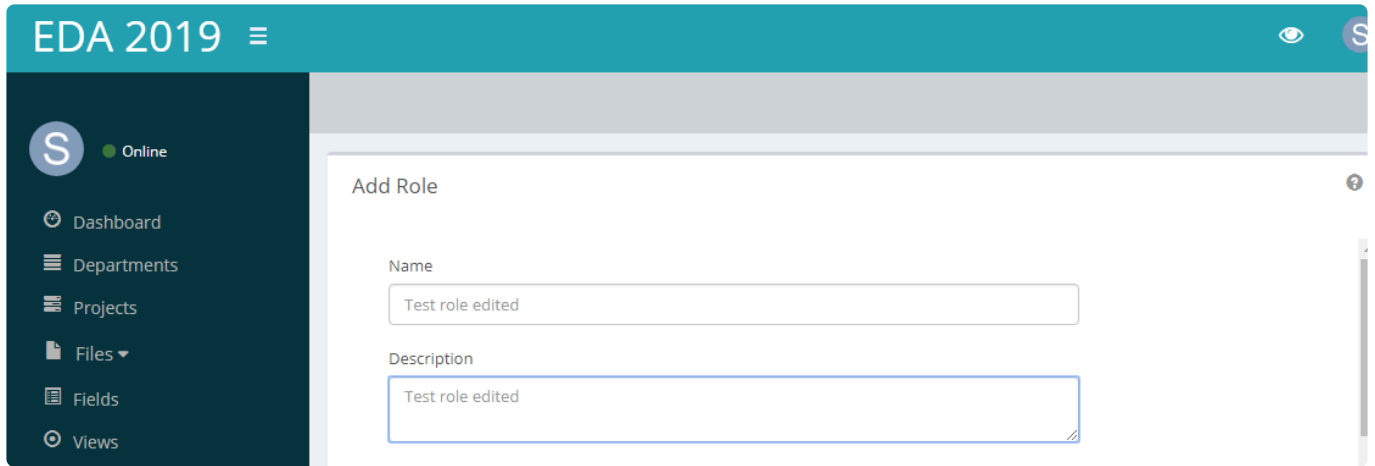


Edit Role:

To edit a saved role, select the role to edit and complete the following steps.

- Modify the role name and description as necessary.
- Modify the access list as necessary.
- Click Save.

Note:We can not edit the **system admin** role



16.3. 15.3 Add Users

You can add a user to WiselIndex to allow them to log in and use the features. **We can create a user only if we have role access.** To create a user, complete the following steps:

1. Navigate to Dashboard>User>Add
2. Enter name of the user
3. Assign a role to the user
4. Enter email id, contact number of the user
5. Enter a user name
6. Make the user active(if needed) by selecting the “**User is active**” checkbox.
7. Enter address details
8. Click Save

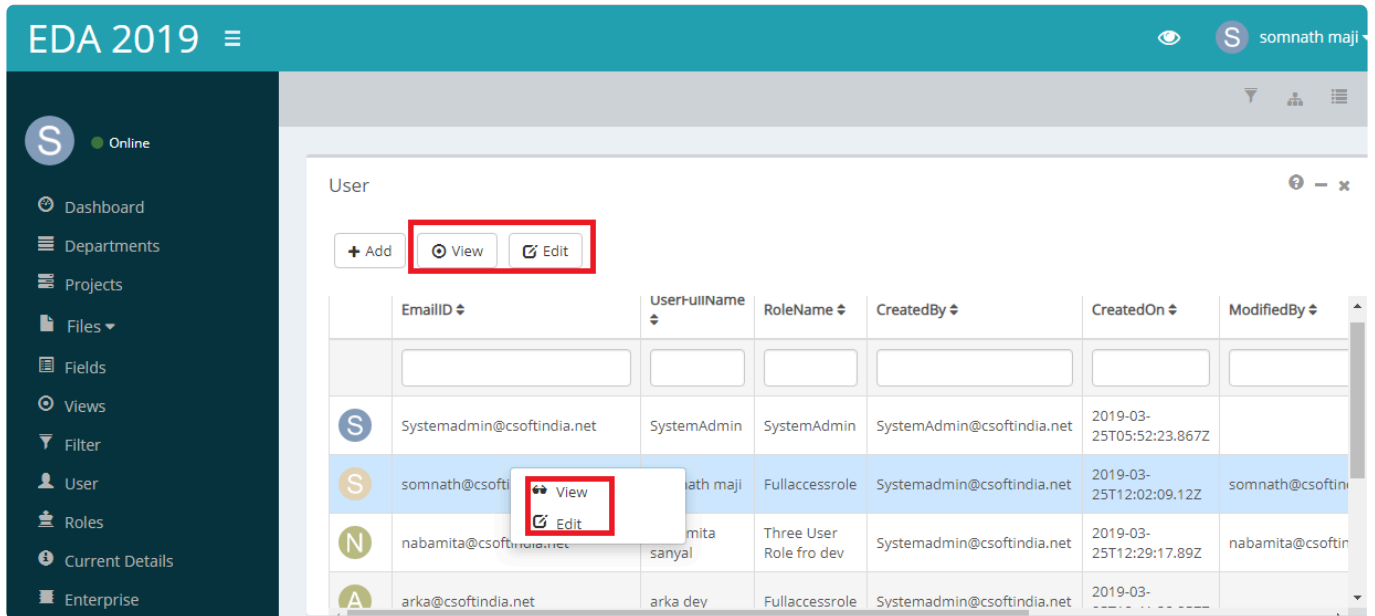
The screenshot shows the 'Add User' form in the EDA 2019 application. The form is titled 'Add User' and is located in the main content area. On the left side, there is a dark teal sidebar with a navigation menu. The top of the page has a teal header with 'EDA 2019' and a hamburger menu icon. The sidebar menu includes: S Online, Dashboard, Departments, Projects, Files, Fields, Views, Filter, User, Roles, Current Details, and Enterprise. The 'Add User' form contains the following fields and options:

- Name:** A text input field containing 'Test user'.
- Middle Name:** A text input field containing 'Enter Middle Name'.
- Last Name:** A text input field containing 'test'.
- Role:** A dropdown menu with 'Select' as the current selection.
- E-Mail:** A text input field containing 'test_user@csoftindia.net'.
- User name:** A text input field containing 'test_user@csoftindia.net'.
- Phone:** A text input field containing '+4763816333'.
- Language:** A dropdown menu with 'Select' as the current selection.

16.4. 15.4 View/Edit Users

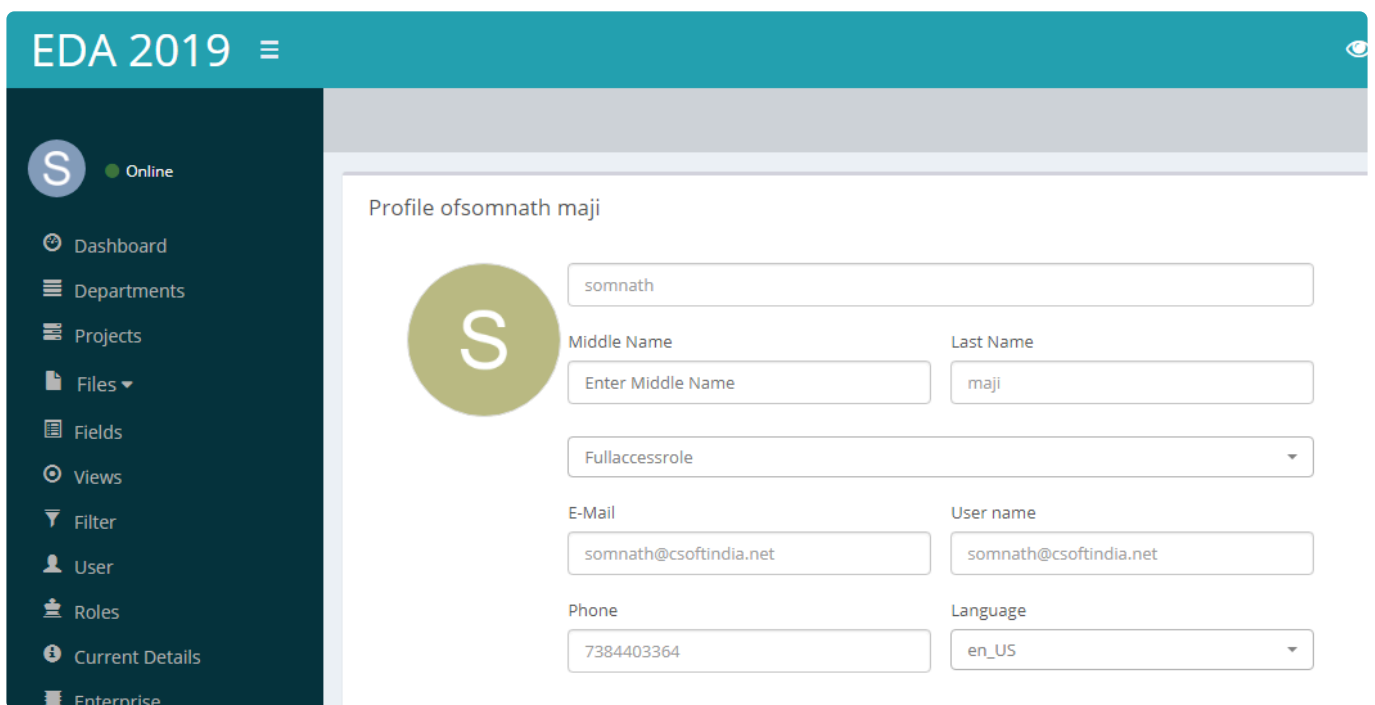
A User can be viewed or edited by two alternative options. User can either select the User by left click of the mouse button. The **edit/view** are then listed as buttons on top of the list control.

User can also right click on the User name and **edit/view** options are then listed as the context menu.



View User:

In this section we can only view a User details,Access list and departments.can not modify the User.



Edit User:

To edit a saved User, select the User to edit and complete the following steps.

- Change profile picture
- Modify the User name,description,role as necessary.
- Modify the User's available department list as necessary.Note that,We can not remove a department from that list if the user is admin of that department
- Make the user active/inactive
- Click Save.

Note:

- We can not edit the **User's access list,Email id and Username.**
- System admin user can not be modified except system admin himself modify it.

The screenshot shows the 'Profile of somnath maji' editing page in the EDA 2019 application. The interface includes a teal header with 'EDA 2019' and a user profile icon labeled 'somnath'. A dark sidebar on the left contains navigation options: Dashboard, Departments, Projects, Files, Fields, Views, Filter, User, Roles, Current Details, and Enterprise. The main content area displays the user's profile information in a form:

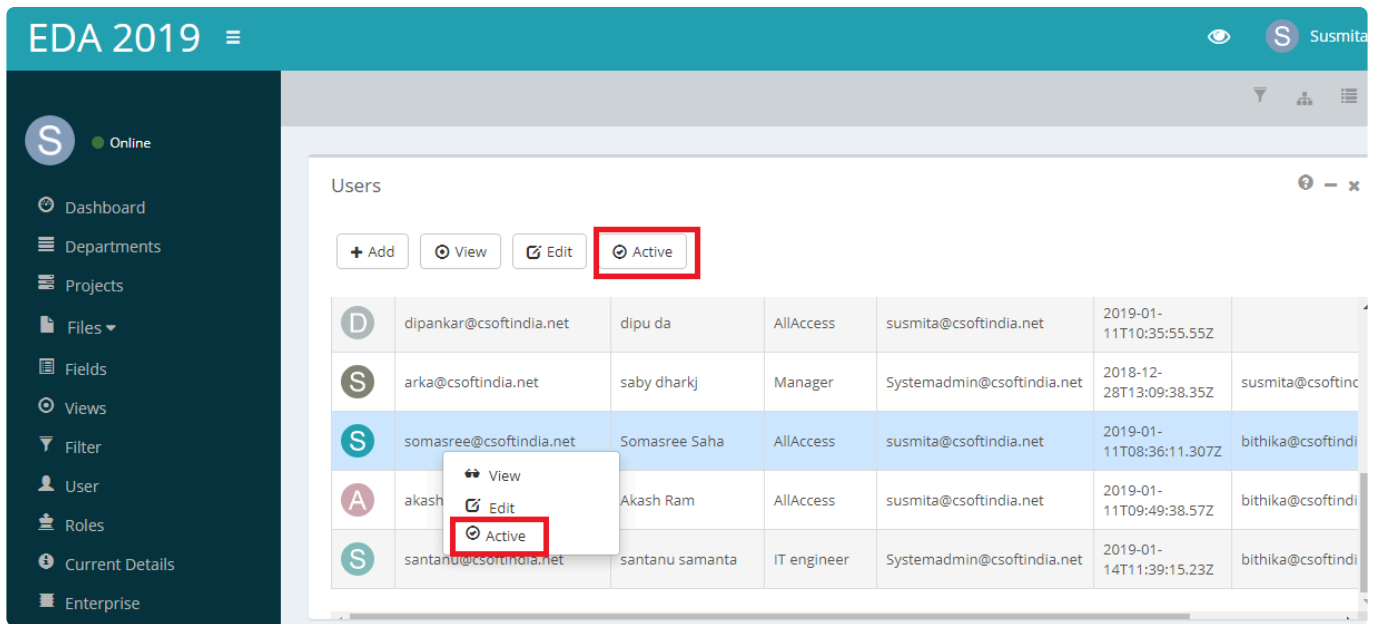
- Profile Picture:** A circular icon with the letter 'S'.
- Full Name:** A text input field containing 'somnath edited'.
- Middle Name:** A text input field with the placeholder 'Enter Middle Name'.
- Last Name:** A text input field containing 'maji'.
- Fullaccessrole:** A dropdown menu.
- E-Mail:** A text input field containing 'somnath@csoftindia.net'.
- User name:** A text input field containing 'somnath@csoftindia.net'.
- Phone:** A text input field containing '7384403364'.
- Language:** A dropdown menu with 'en_US' selected.

16.5. 15.5 Active/Inactive Users

Active user

A User can be made **Active** by **Active** option. To access the option, the user has two alternative options. User can either select User by left click of the mouse button. The **Active** option is then listed as buttons on top of the list control.

User can also right click on the User name and **Active** option is then listed as the context menu.



Inactive user

A User can not be deleted, it can be made **inactive** by **Inactive** option. To access the option, the user has two alternative options. User can either select user by left click of the mouse button. The **Inactive** option is then listed as buttons on top of the list control.

User can also right click on the user and **Inactive** option is then listed as the context menu.

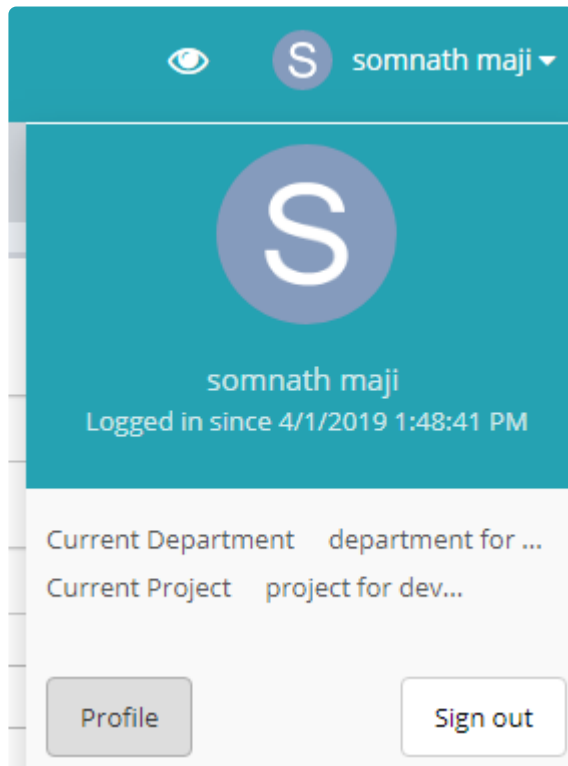
The screenshot displays the 'User' management interface in EDA 2019. The sidebar on the left lists various navigation options. The main area shows a table of users with columns for profile picture, email, name, role, and other details. The 'InActive' button is highlighted in red, and a context menu for the user 'nabamita@ssoftindia.net' is shown, with the 'InActive' option also highlighted in red.

Profile	Email	Name	Role	SystemAdmin	Timestamp	Other
S	Systemadmin@csoftindia.net	SystemAdmin	SystemAdmin	SystemAdmin@csoftindia.net	2019-03-25T05:52:23.867Z	
S	somnath@csoftindia.net	somnath maji	Fullaccessrole	Systemadmin@csoftindia.net	2019-03-25T12:02:09.12Z	somnath@csoftin
N	nabamita@	Nabamita sanyal	Three User Role fro dev	Systemadmin@csoftindia.net	2019-03-25T12:29:17.89Z	nabamita@csoftin
A	arka@csoftindia.net	arka dey	Fullaccessrole	Systemadmin@csoftindia.net	2019-03-25T12:41:38.857Z	
S	sohini@csoftindia.net	sohini bose	Fullaccessrole	Systemadmin@csoftindia.net	2019-03-25T12:43:21.253Z	

There can be maximum **five** active users in the list.If the limit exceeds,it is not possible to make another user **active**.

16.6. 15.6 Edit Profile

To edit a User profile, navigate to logged in user name on the top right corner, and then select profile.



- Change profile picture
- Modify the User name, description, role as necessary.
- Modify the User's available department list as necessary. Note that, We can not remove a department from that list if the user is admin of that department
- Make the user active/inactive
- change password if necessary
- We can change user's role only if we have access to change role
- Click Save.

Note:

- We can not edit the **User's access list, Email id and Username.**
- System admin user can not be modified because it is mandatory that there must be one user as **system admin.**

EDA 2019 ☰ 👁 S somnath

S ● Online

- Dashboard
- Departments
- Projects
- Files ▾
- Fields
- Views
- Filter
- User
- Roles
- Current Details
- Enterprise

Profile of somnath maji

S

Middle Name	Last Name
<input type="text" value="Enter Middle Name"/>	<input type="text" value="maji"/>
Fullaccessrole ▾	
E-Mail	User name
<input type="text" value="somnath@csoftindia.net"/>	<input type="text" value="somnath@csoftindia.net"/>
Phone	Language
<input type="text" value="7384403364"/>	<input type="text" value="en_US"/>

17. 16 Tags

A tag is a keyword that helps to describe an file and allows to search a file. For example if we create a tag “xyz” and search files using the tag, then every file name contains “xyz” will appear in the list.


Following are the subtopics covered in this chapter:

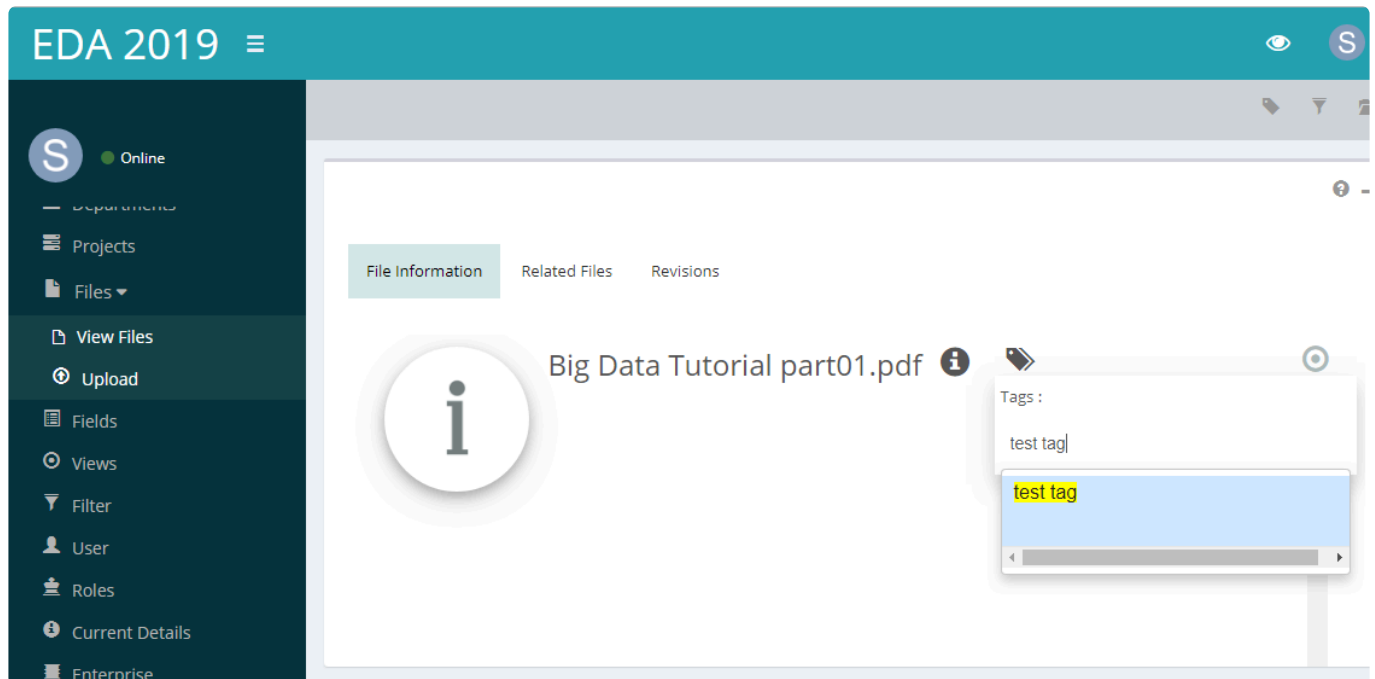
[14.1 Add tag](#)

[14.2 View tags](#)

17.1. 16.1 Add tags

To add a tag complete the following steps:

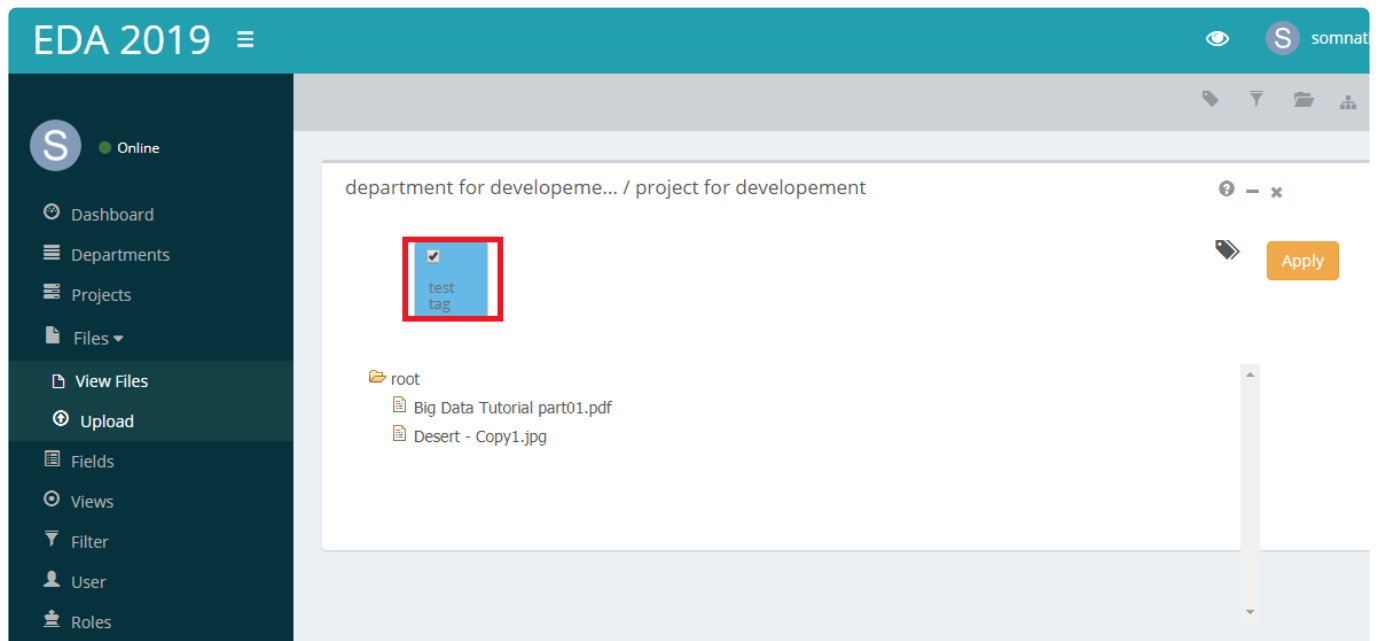
1. Open a file
2. There is a tag logo 
3. Right click of mouse button
4. Enter name



17.2. 16.2 View files using tags

To view files using tags,

1. select Files>view files.
2. Add a tag to a file. See topic [Add tag](#)
3. Select the tag you want to use and click **apply**
4. All the files associated with the selected tag will appear on the page.



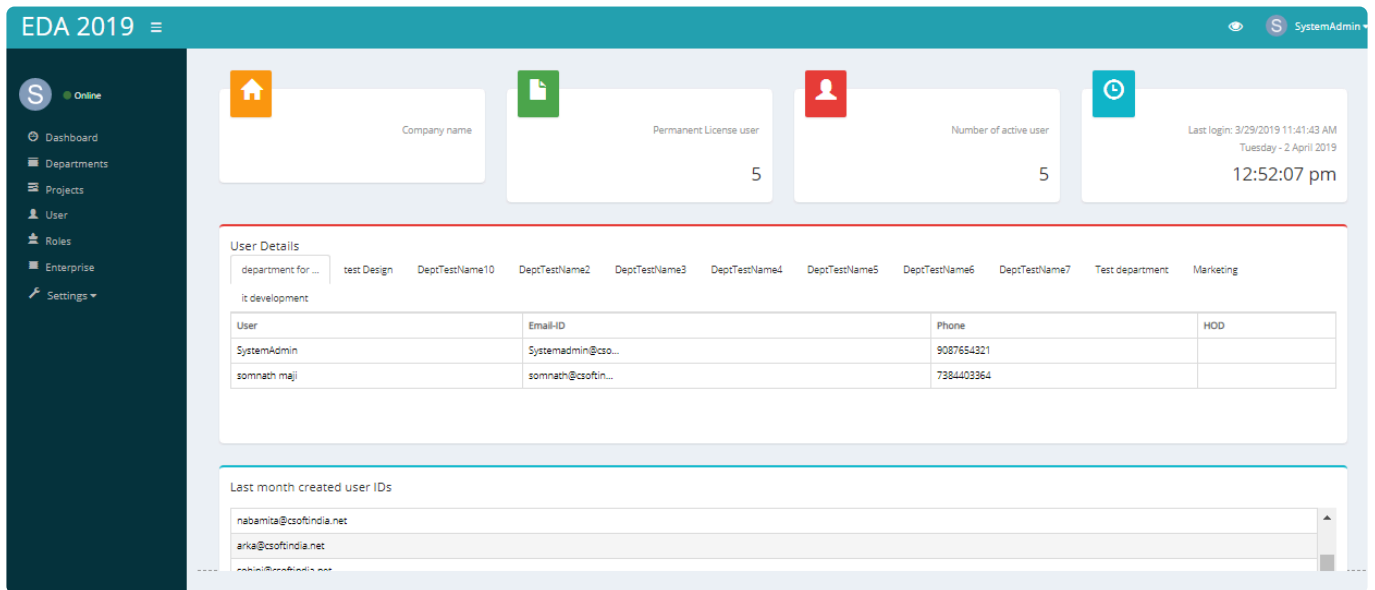
18. 17. System admin role

WiselIndex restrict one user to be a system administrator. The task is performed by a system administrator who performs configuration, cache reload, provides user access, manages user accounts, manages department, projects etc. We will cover the below topics in this chapter:

- [System admin dashboard](#)
- [Settings](#)

18.1. 17.1 System admin dashboard

Once a system admin login into WiselIndex with user name and password,he will be taken to dashboard page.System admin dashboard looks like as below:



A system admin can do the below operation:

1.Department:

System admin can view all the departments created by other users and do other department related operation.For details see the topic [Department](#)

2.Project:

System admin can view all the projects created by other users and do other project related operation.For details see the topic [projects](#)

3.User and role:

System admin can add,edit any role and user.
See topic [User and roles](#)

4.Enterprise

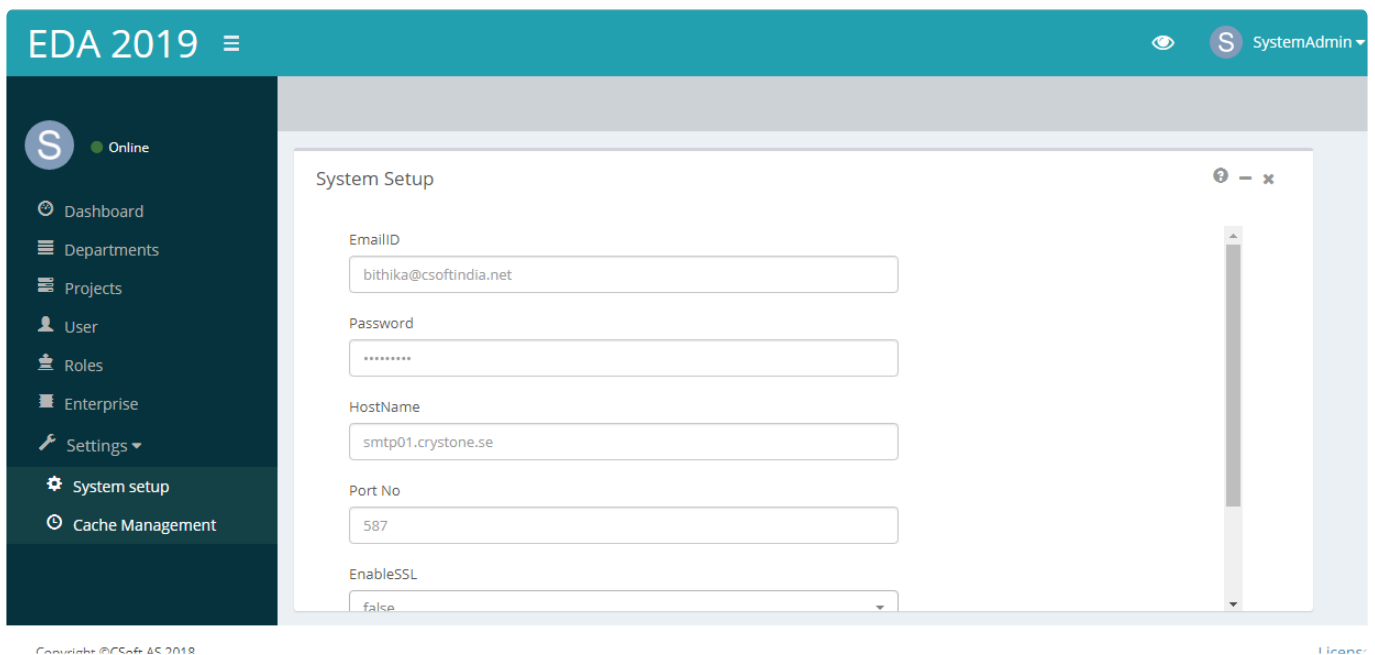
See topic [Enterprise](#)

18.2. 17.2 Settings

System admin in WiselIndex is responsible for system set up and settings. Setting option can be seen on the system admin dashboard. There are two parts in settings. 1) *System setup* 2) *Cache management*

1. System setup

1. Navigate to Dashboard>Settings>System setup
2. Enter valid email id, password
3. Give host name, port number
4. Enable SSL
5. Click save



2. Cache management

WiselIndex’s cache management system is an easy way to improve the performance of your software. Whenever a cache needs to be refreshed, a notice appears at the top of the page to guide you through the process. After clearing a cache, always refresh your browser to make sure that you can see the most recent files. To reload cache, below are the steps:

1. Navigate to Dashboard>Settings>Cache management
2. Click the button **reload cache**. A permission tab will open.

EDA 2019 ≡ SystemAdmin

S Online

- Dashboard
- Departments
- Projects
- User
- Roles
- Enterprise
- Settings ▾
- System setup
- Cache Management

Cache management ? - x

Last call time : Reload cache

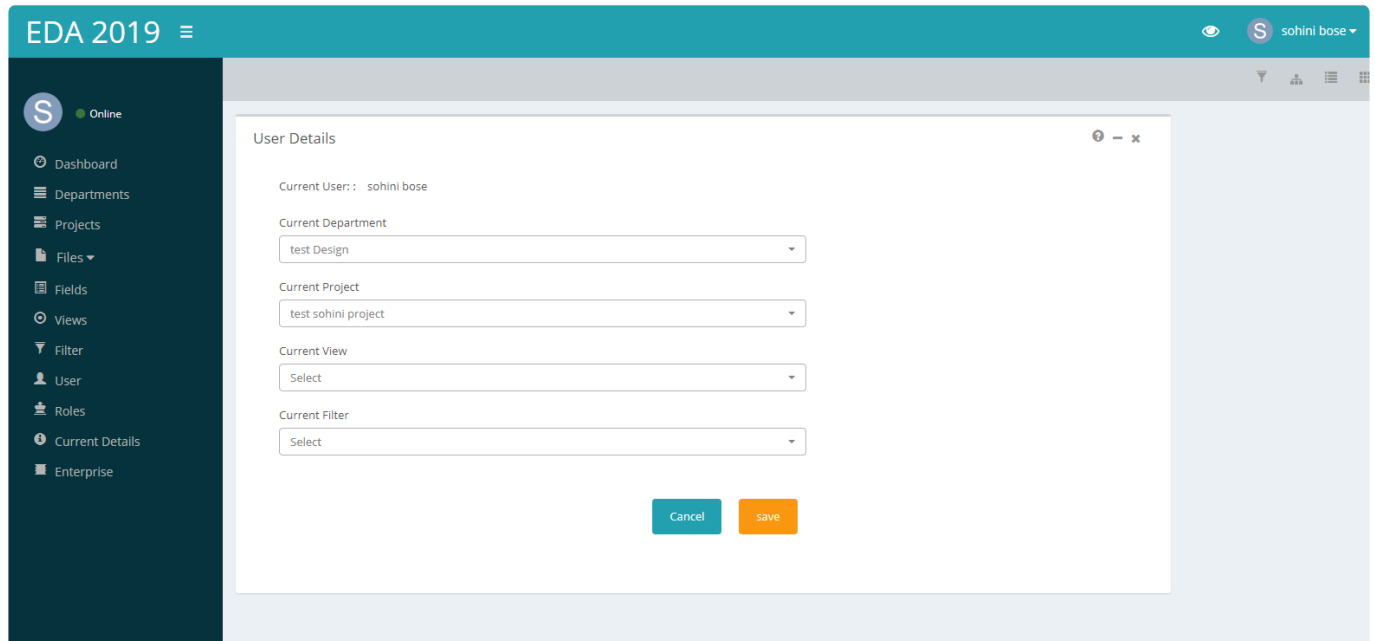
x

Are you sure you want to do this?

Ok. Cancel

19. 18.Current details

Current details tab defines the **Current department,Current project,Current filter,Current view** of logged in user.The logged in user has to set the details in current details page so that whenever it is required to create a field,filter,project,or view the current details will be fetched from this page.This will also work for uploading a file in a project.This page looks like the below screenshot:



The screenshot displays the 'User Details' form within the EDA 2019 application. The form is titled 'User Details' and shows the current user as 'sohini bose'. It contains four dropdown menus: 'Current Department' (test Design), 'Current Project' (test sohini project), 'Current View' (Select), and 'Current Filter' (Select). There are 'Cancel' and 'save' buttons at the bottom.

20. 19. Frequently Asked Questions (FAQs)

1. What is the minimum Server Requirement to install WiselIndex?
2. Is it possible to import our existing data?
3. What are the formats of data can be uploaded in WiselIndex? Can we view all file formats in WiselIndex?