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# **Banyan 1.7 Compliance Manager Rough Guide Version 1.4**

*R. H. Barter*

September 6, 2005

Banyan 1.7  
Compliance Manager  
Rough Guide  
Version 1.4

September 6, 2005

UCRL-TR-215054

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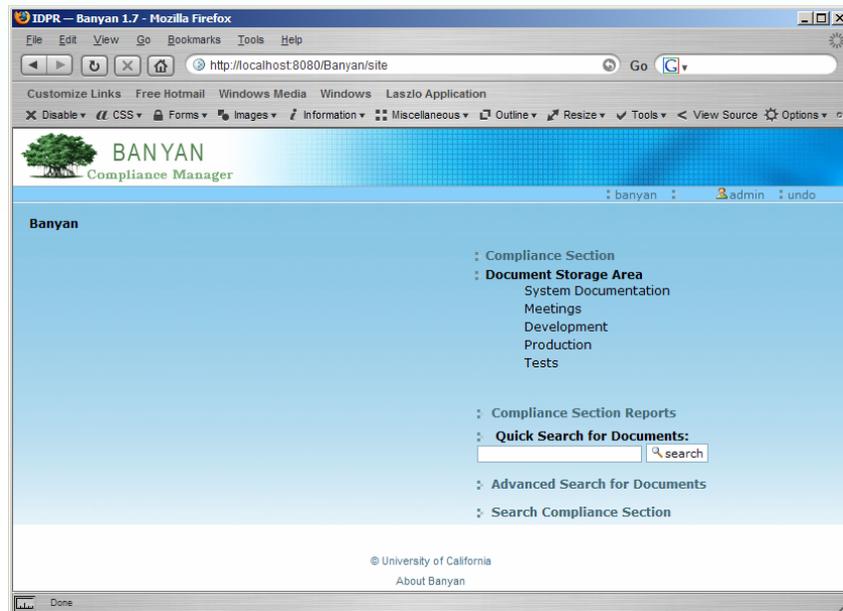
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# 1 Getting Started

## 1.1 Logging On

If you are using Banyan from a sever, then your URL will be provided by your system administrator. Please fill in the URL in the space provided. If you are using a version of Banyan that you installed on your workstation from the setup.exe file and you have accepted all of the default settings, then your URL will be <http://localhost:8080/Banyan>.

URL: \_\_\_\_\_





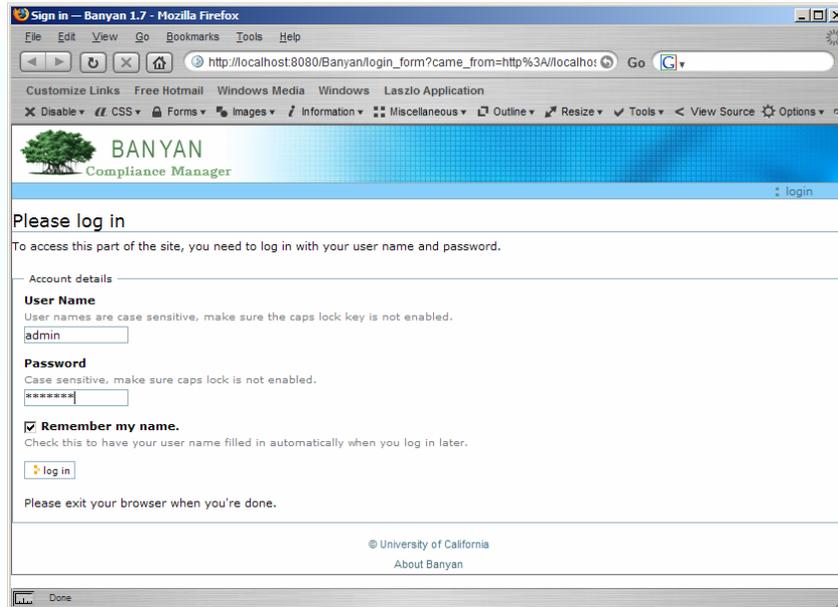
## 1.2 User Name and Password

Enter your user name and password. As with the URL above, you may have to contact your system administrator for a user name and password if you are running off of a server. If you are using Banyan on your workstation as installed by the setup.exe file, then you have a choice of login names:

User Name	Password	Roles
admin	Whatever password you provided as a default in the setup dialog	Basic reader capability within Banyan, ability to create new Banyan sites (beyond the scope of this document)
Banyan_Configurator	Banyan_Configurator	Configurator role -- has the ability to configure Banyan.
Banyan_Contributor	Banyan_Contributor	Contributor role and has the ability to add content to Banyan.
Banyan_Metadata_Editor	Banyan_Metadata_Editor	Metadata_Editor role and has the ability to edit metadata in the Banyan Document Storage Area.
Banyan_Reader	Banyan_Reader	Reader role and has the ability to view Banyan information.

**Note:** in most environments it is a really bad idea to keep the above passwords – even on your own workstation. If you are doing anything more than just checking out Banyan, then you will want to change the above defaults. Consult the Banyan System Administration Guide or a system administrator for help in changing users and passwords.

Log in with a user name and a password.



Sign in — Banyan 1.7 - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

http://localhost:8080/Banyan/login\_form?came\_from=http%3A//localho Go

Customize Links Free Hotmail Windows Media Windows Laszlo Application

Disable CSS Forms Images Information Miscellaneous Outline Resize Tools View Source Options

 **BANYAN**  
Compliance Manager

login

**Please log in**

To access this part of the site, you need to log in with your user name and password.

Account details

**User Name**  
User names are case sensitive, make sure the caps lock key is not enabled.

**Password**  
Case sensitive, make sure caps lock is not enabled.

**Remember my name.**  
Check this to have your user name filled in automatically when you log in later.

Please exit your browser when you're done.

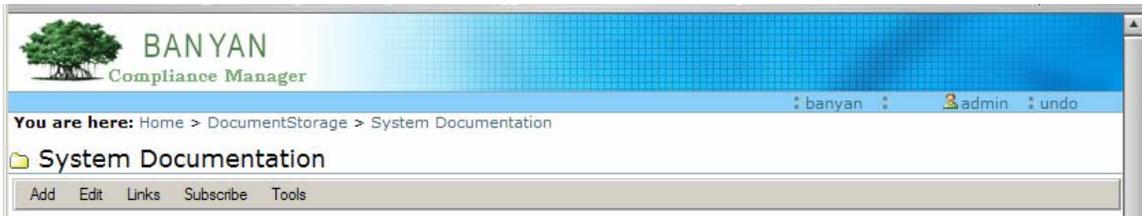
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About Banyan

Done

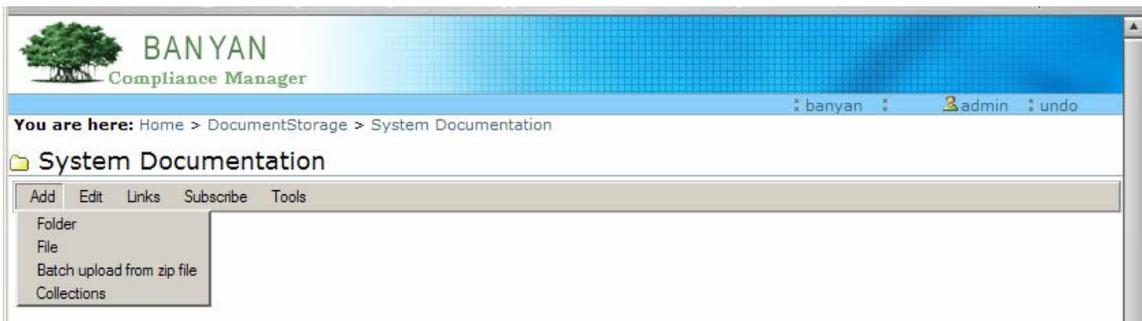
## 2 Document Storage Area



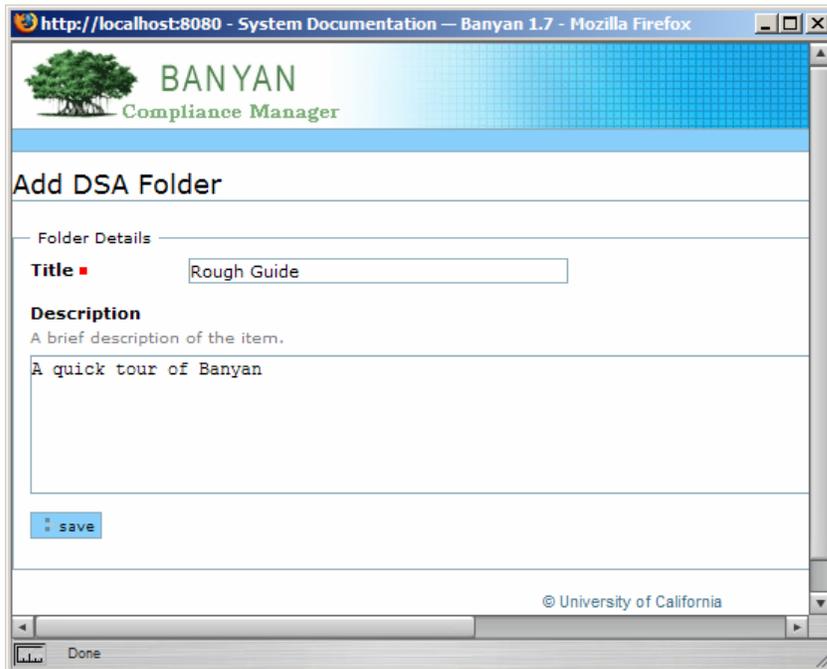
### 2.1 System Documentation



### 2.2 Add

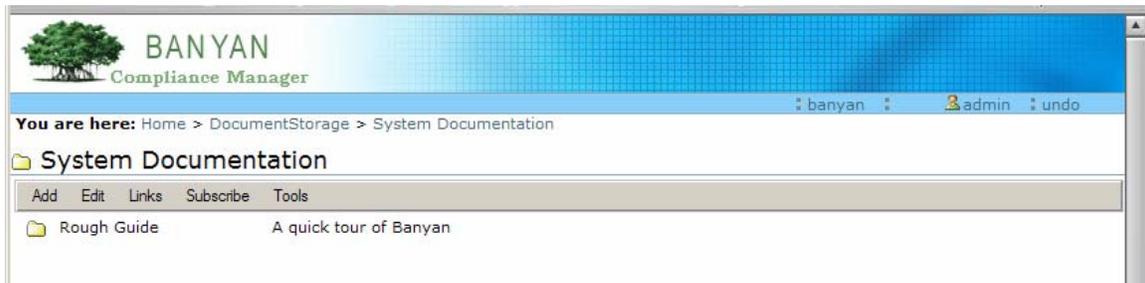


## 2.2.1 Add Folder



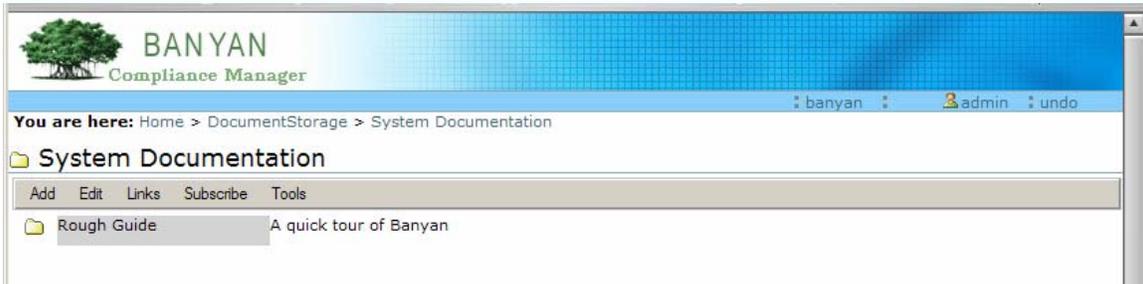
The screenshot shows a web browser window titled "http://localhost:8080 - System Documentation — Banyan 1.7 - Mozilla Firefox". The page header includes the Banyan logo and "BANYAN Compliance Manager". The main heading is "Add DSA Folder". Under "Folder Details", there is a "Title" field with the value "Rough Guide" and a "Description" field with the text "A quick tour of Banyan". A "save" button is located below the description field. The footer of the page reads "© University of California".

Produces:

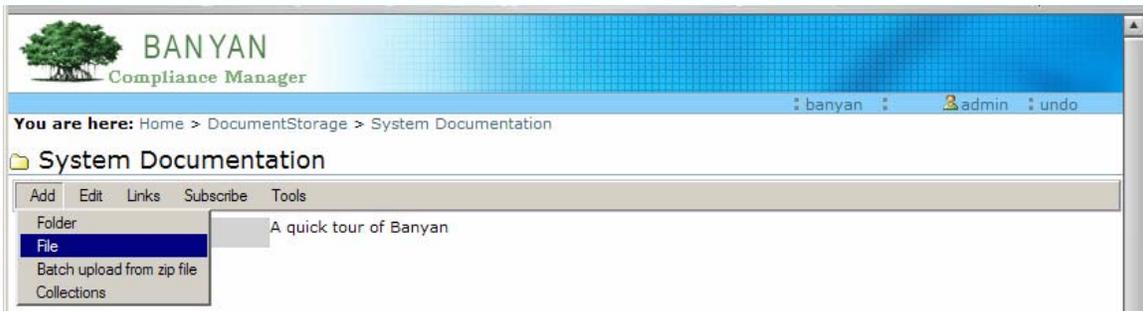


## 2.2.2 Add File

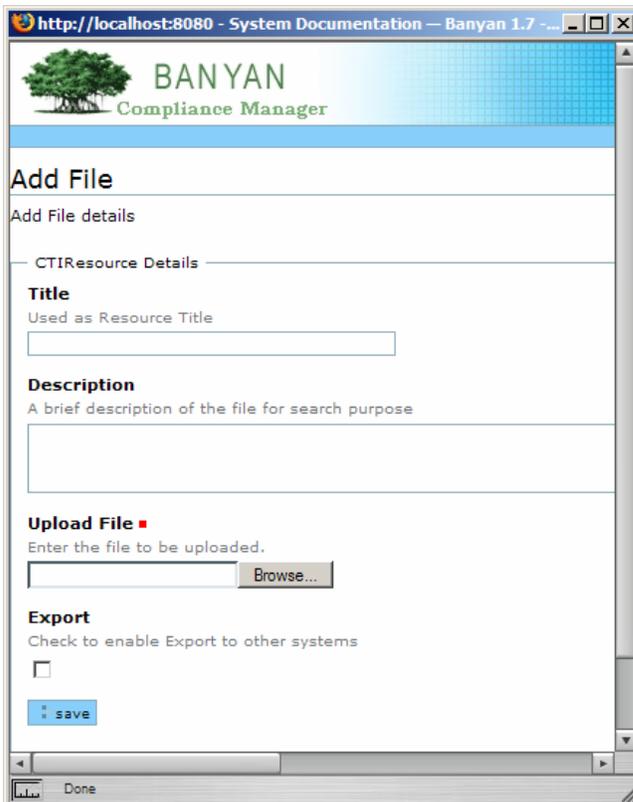
### Select Folder



### Add File

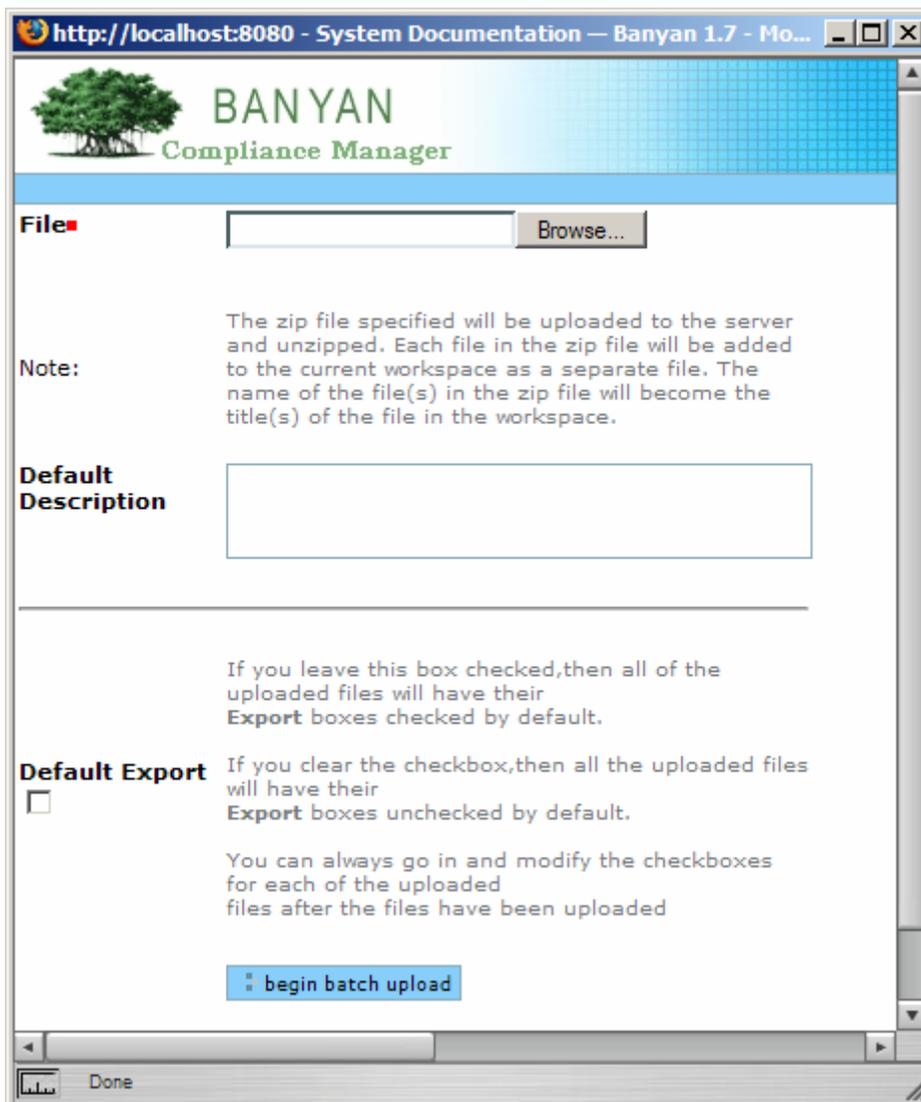
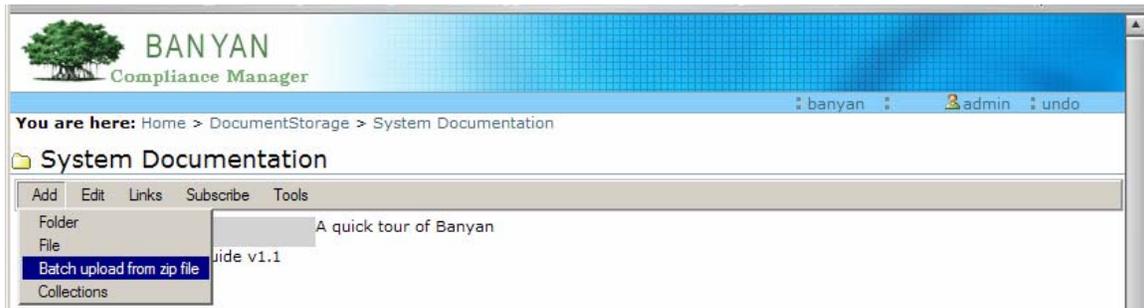


Add File dialog – Upload File ■ is the only required field

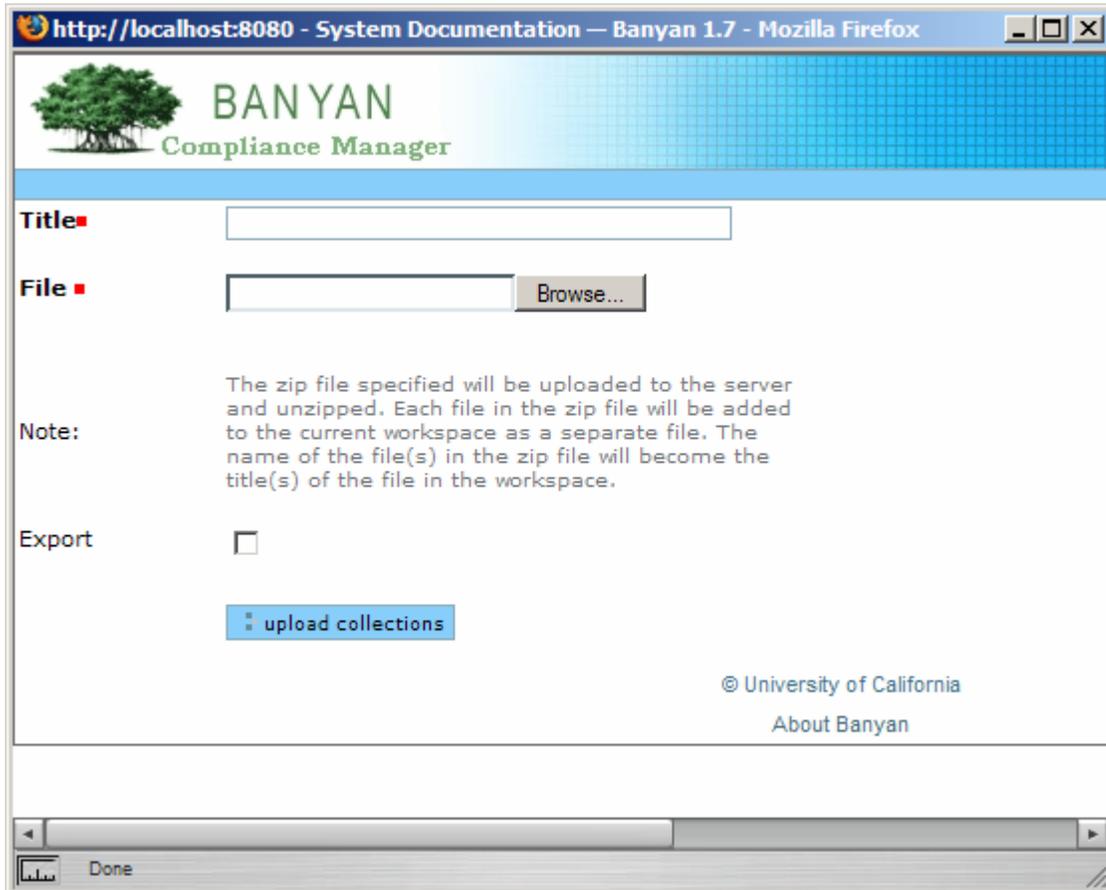
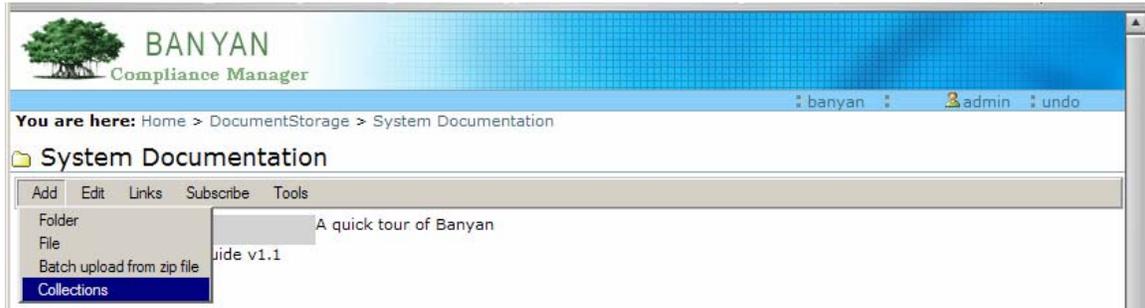




## 2.2.3 Add a zip file

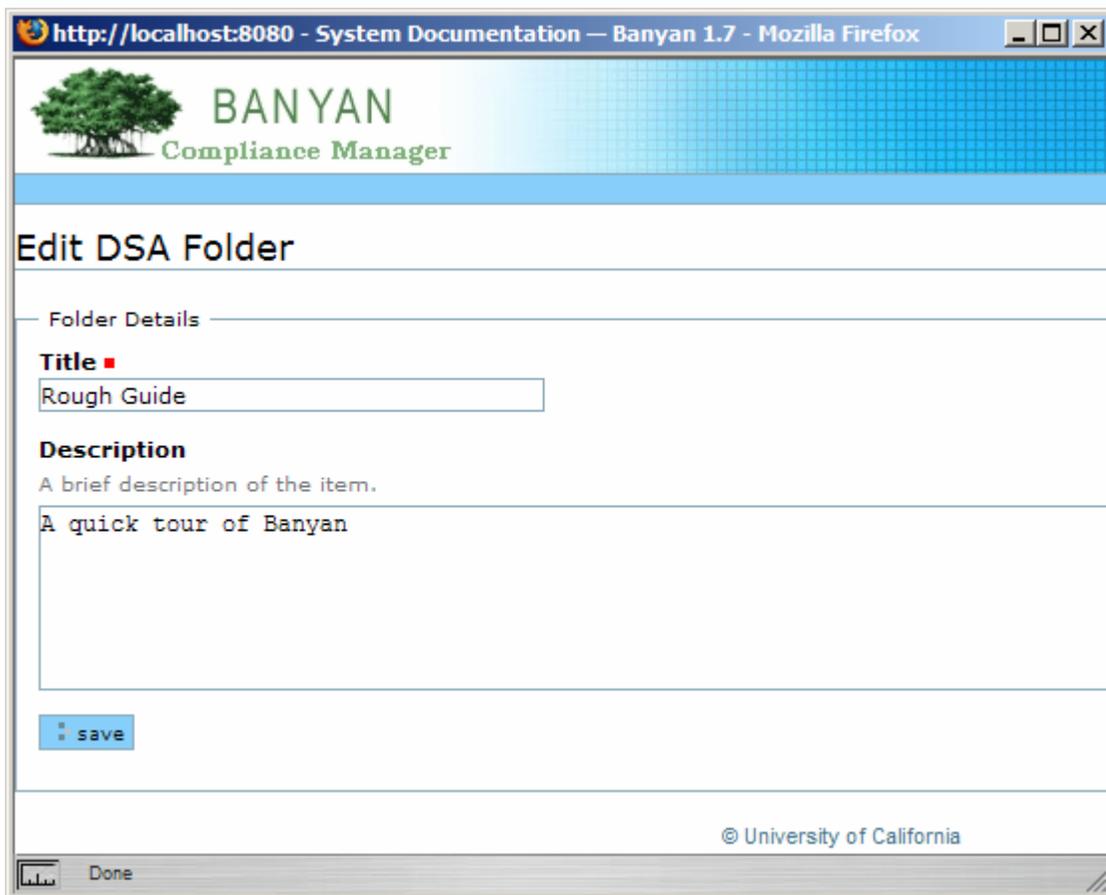
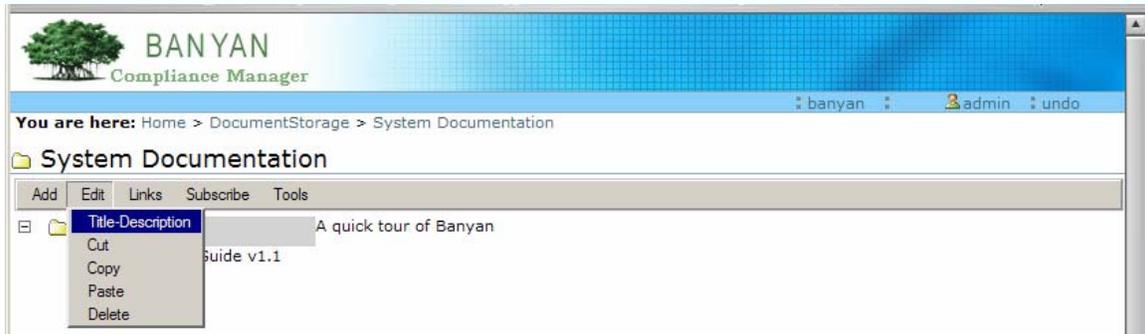


## 2.2.4 Add a Collection

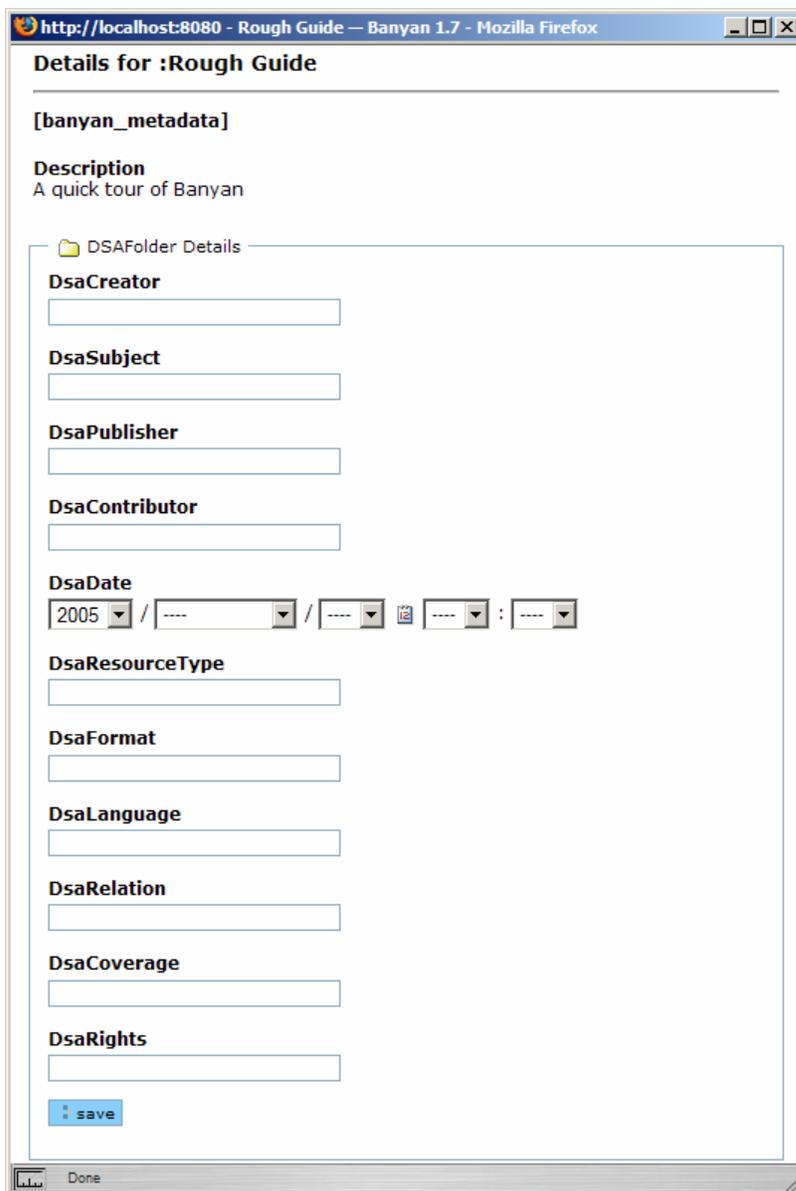
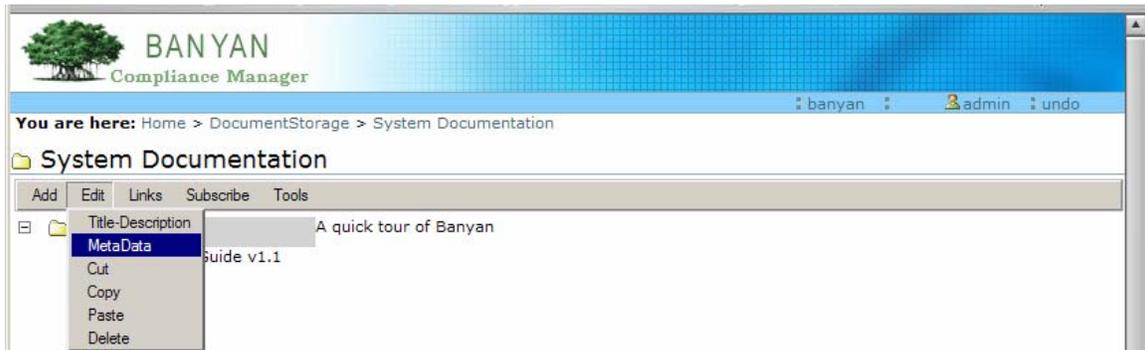


## 2.3 Edit

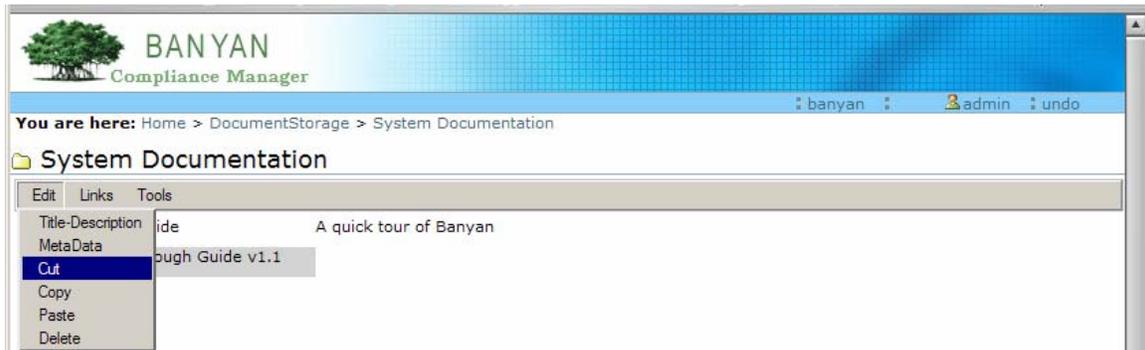
### 2.3.1 Title and Description



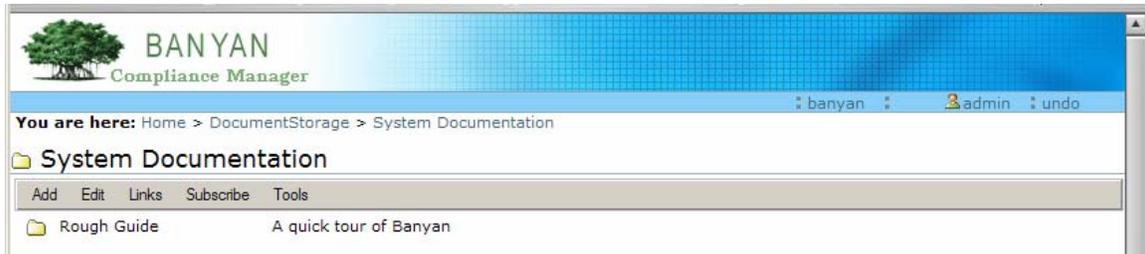
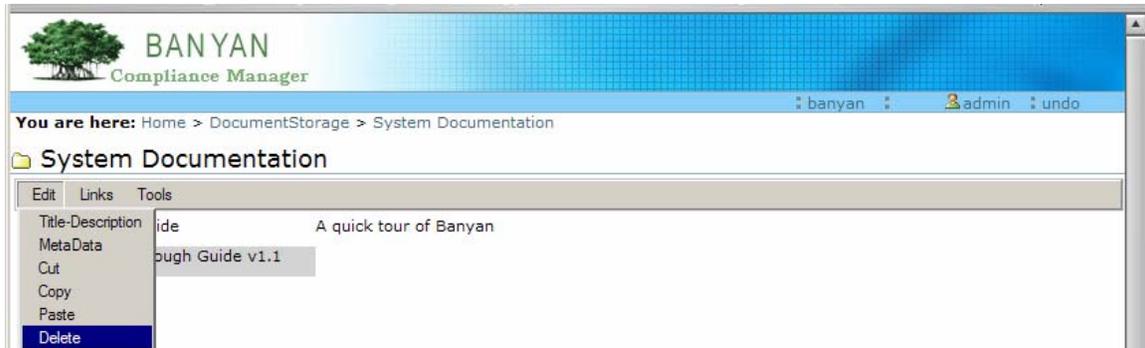
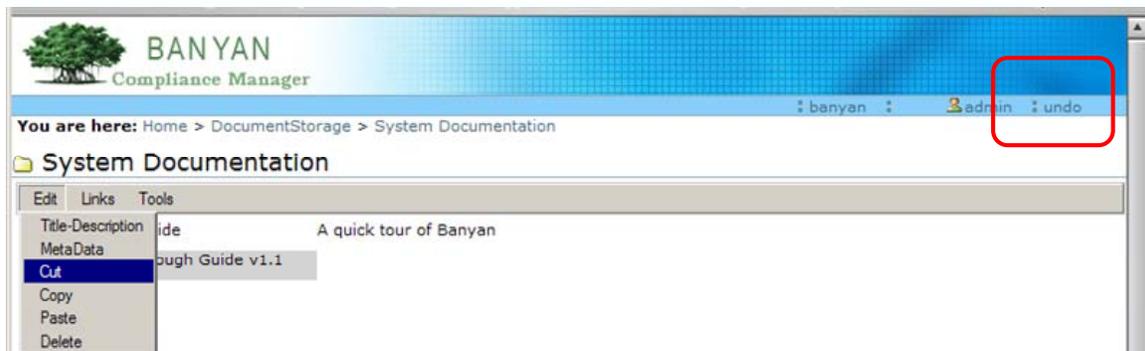
## 2.3.2 Edit Metadata

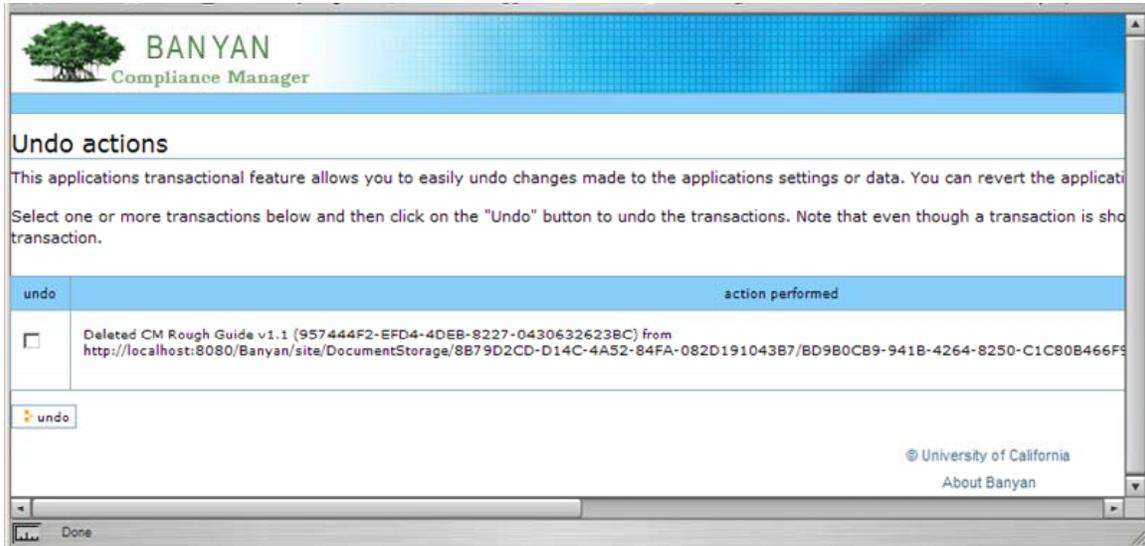


### 2.3.3 Cut/Copy/Paste/Delete



### 2.3.4 Undo





**BANYAN Compliance Manager**

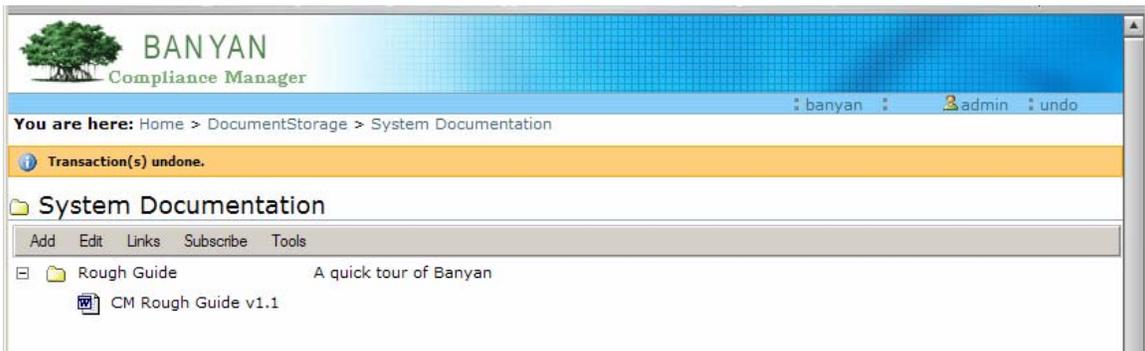
### Undo actions

This applications transactional feature allows you to easily undo changes made to the applications settings or data. You can revert the applicati  
 Select one or more transactions below and then click on the "Undo" button to undo the transactions. Note that even though a transaction is sho  
 transaction.

undo	action performed
<input type="checkbox"/>	Deleted CM Rough Guide v1.1 (957444F2-EFD4-4DEB-8227-0430632623BC) from <a href="http://localhost:8080/Banyan/site/DocumentStorage/8B79D2CD-D14C-4A52-84FA-082D191043B7/BD980CB9-941B-4264-8250-C1C80B466F9">http://localhost:8080/Banyan/site/DocumentStorage/8B79D2CD-D14C-4A52-84FA-082D191043B7/BD980CB9-941B-4264-8250-C1C80B466F9</a>

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About Banyan

Done



**BANYAN Compliance Manager**

banyan admin undo

**You are here:** Home > DocumentStorage > System Documentation

**Transaction(s) undone.**

### System Documentation

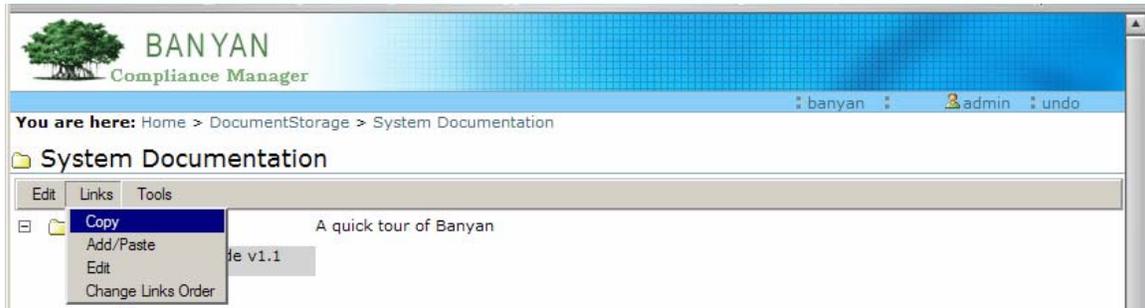
Add Edit Links Subscribe Tools

- Rough Guide A quick tour of Banyan
  - CM Rough Guide v1.1

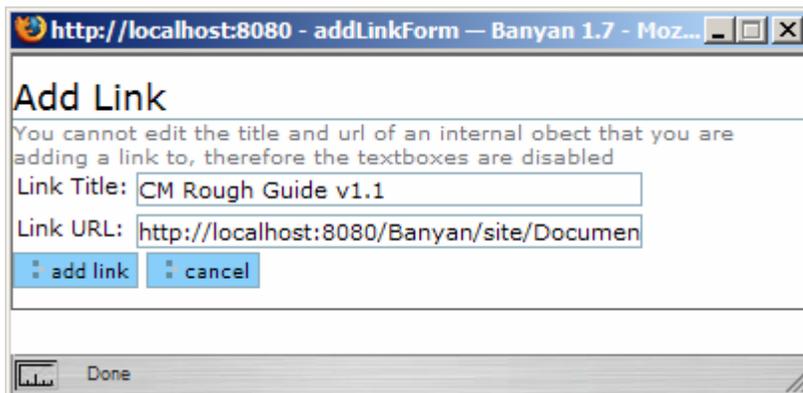
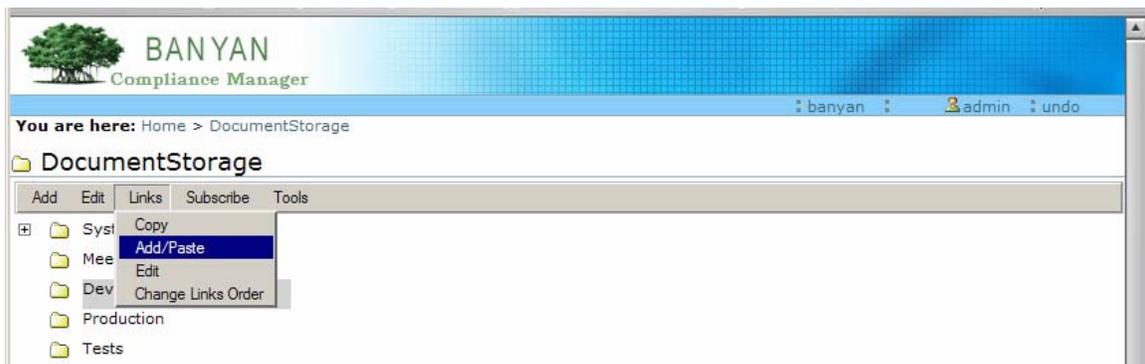
## 2.4 Links

### 2.4.1 Create a link

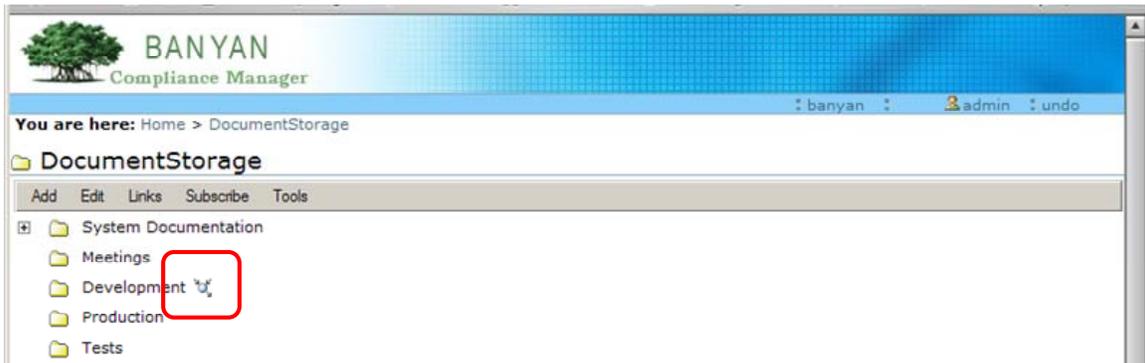
Copy the link target (destination)



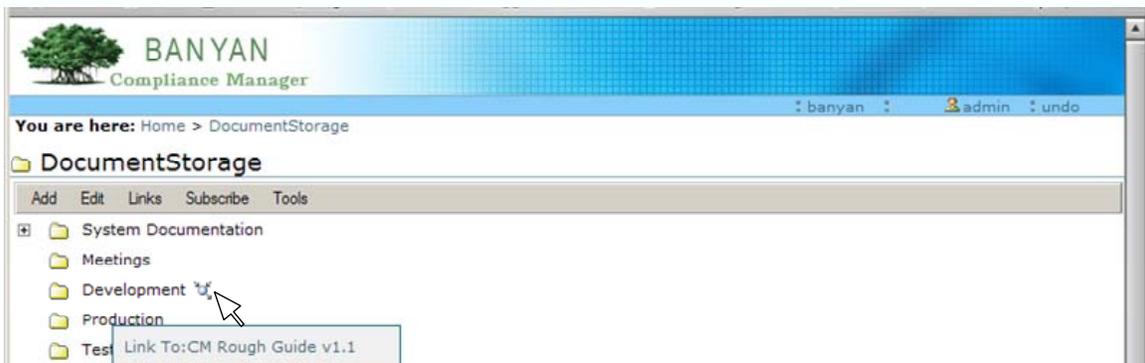
Go to another location and Add/Paste the link



Link symbol appears

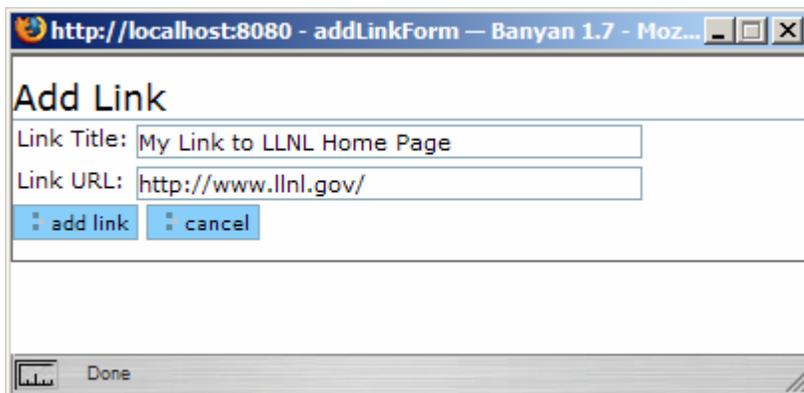
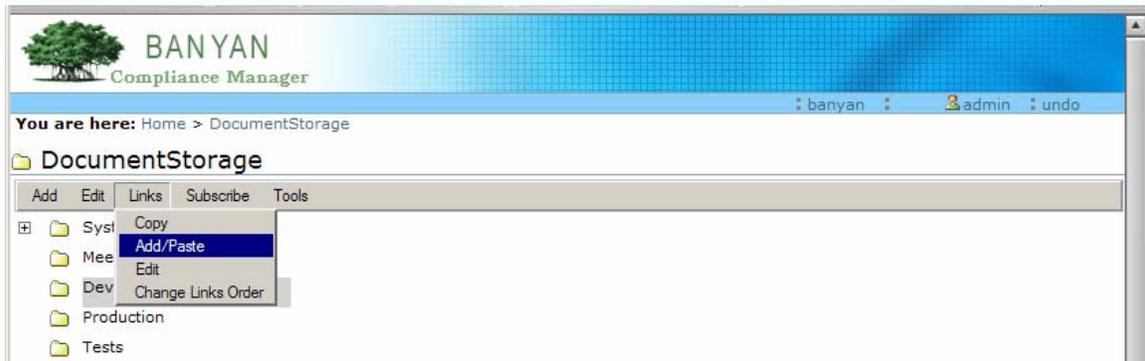


Link window shows link to target

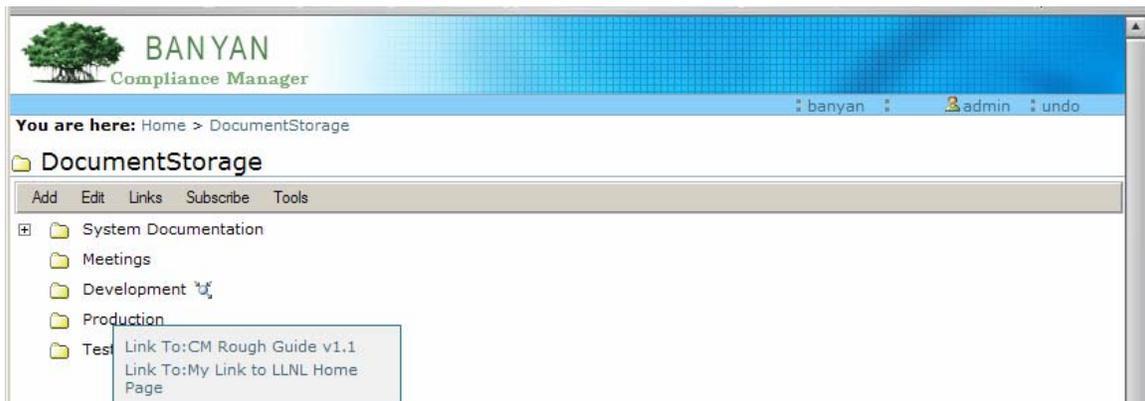


## 2.4.2 Add Arbitrary Links

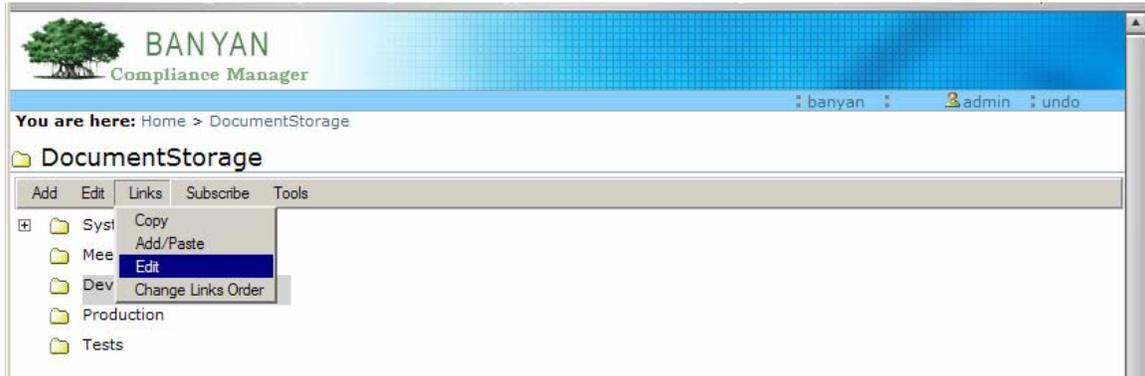
Add without previous Link Copy



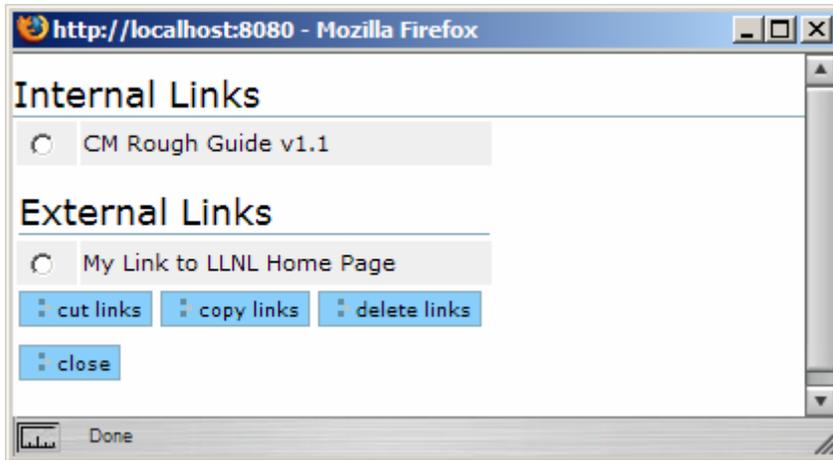
Now two links in pop-up



## 2.4.3 Edit Links

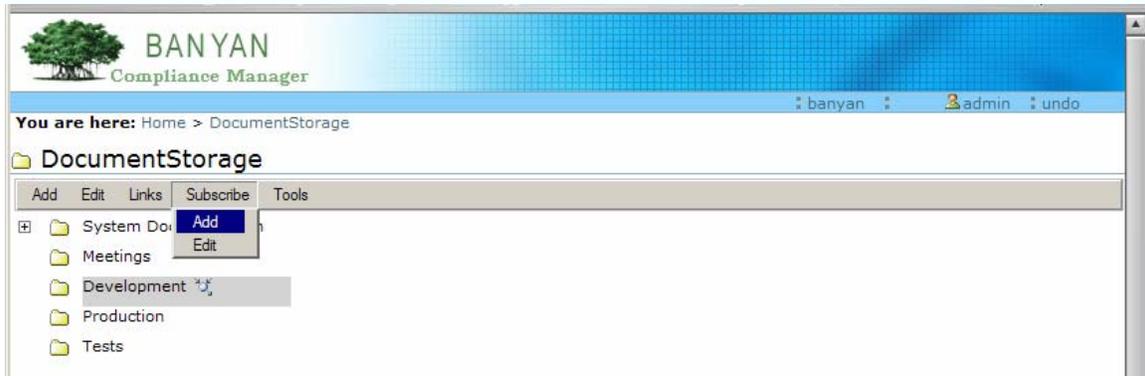


Cut/Copy/Paste links

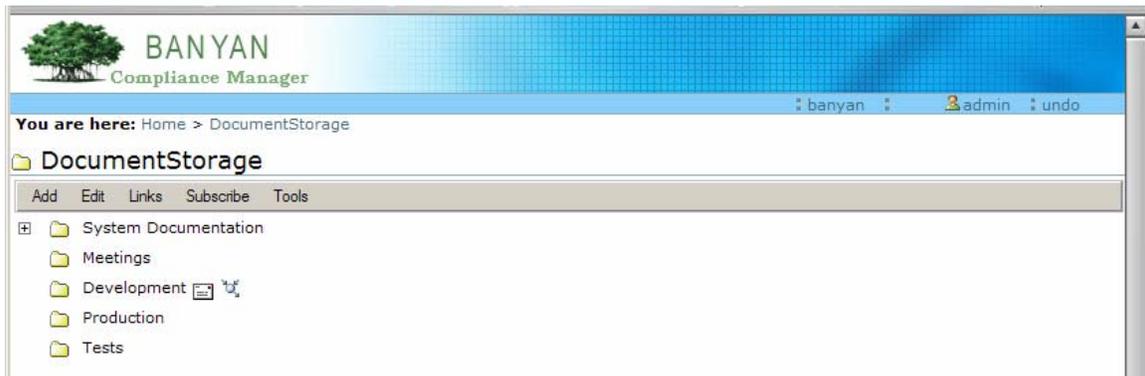


## 2.5 *Subscribe to Changes*

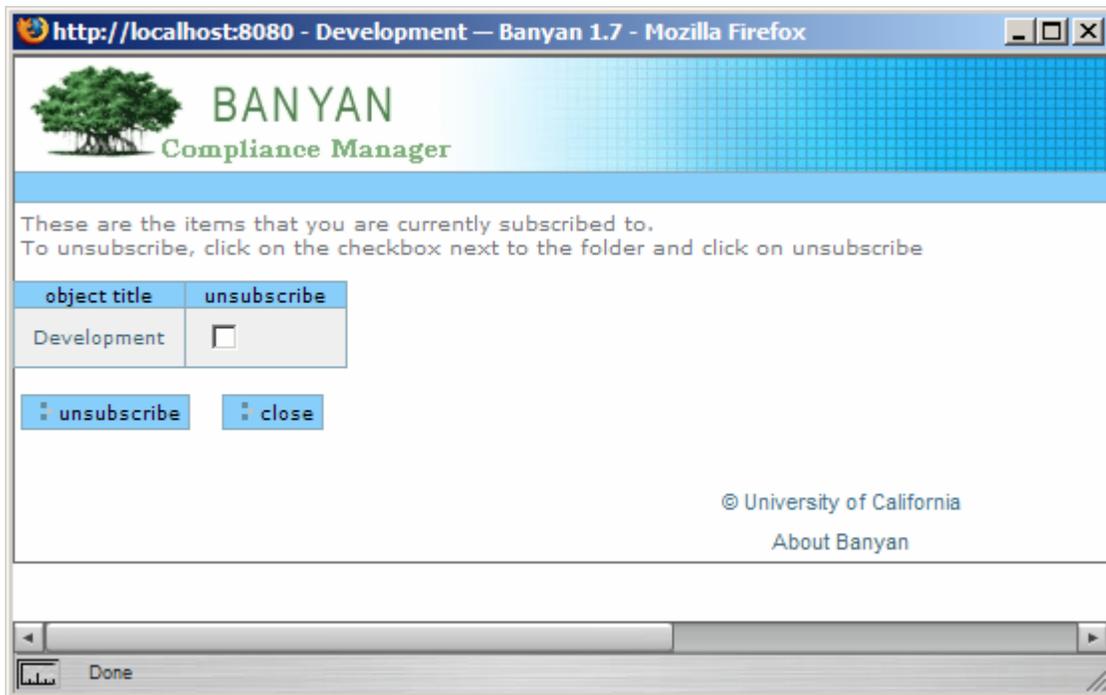
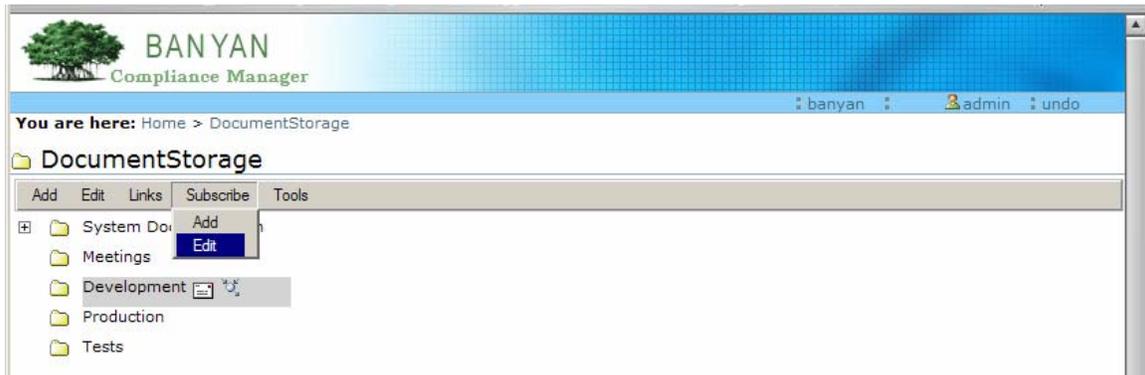
### 2.5.1 Add a Subscription



Icon added

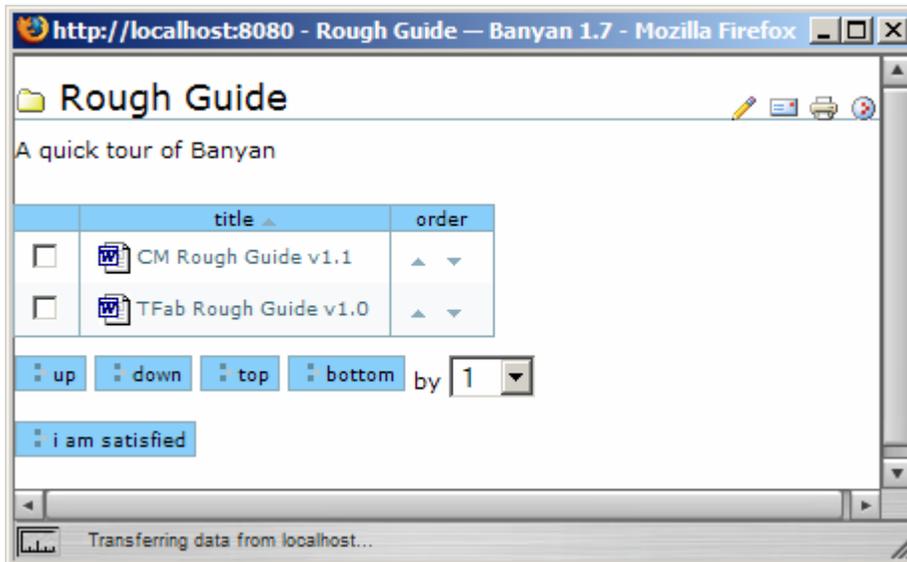


## 2.5.2 Edit Subscriptions



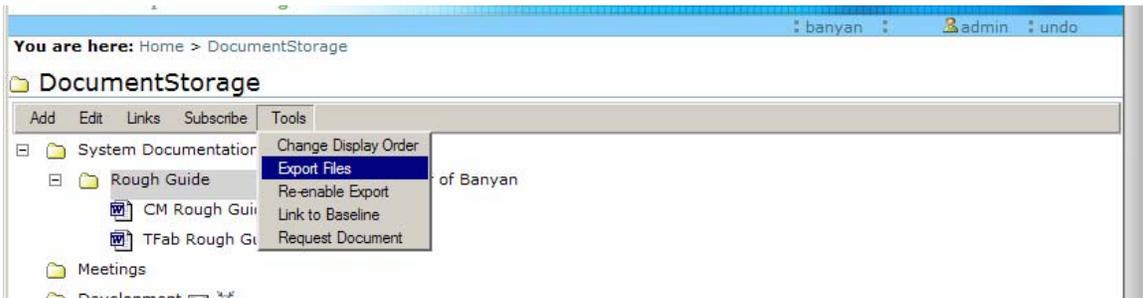
## 2.6 Tools

### 2.6.1 Change Display Order



## 2.6.2 Export Files

Only available if you have metadata editor role and files have been marked for export.



### 2.6.3 Re-enable Export

Once a file has been exported its Export checkbox is disabled and it will not be exported again is Tools/Export Files is selected.

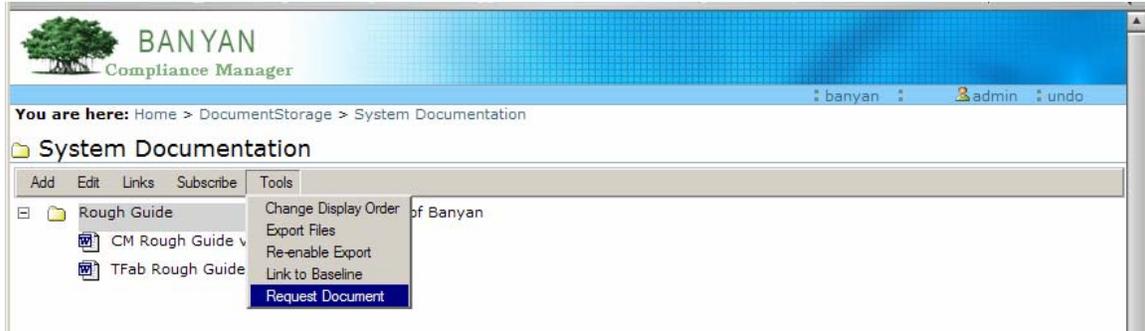


Re-enabling Export resets the file so that it can be exported again.

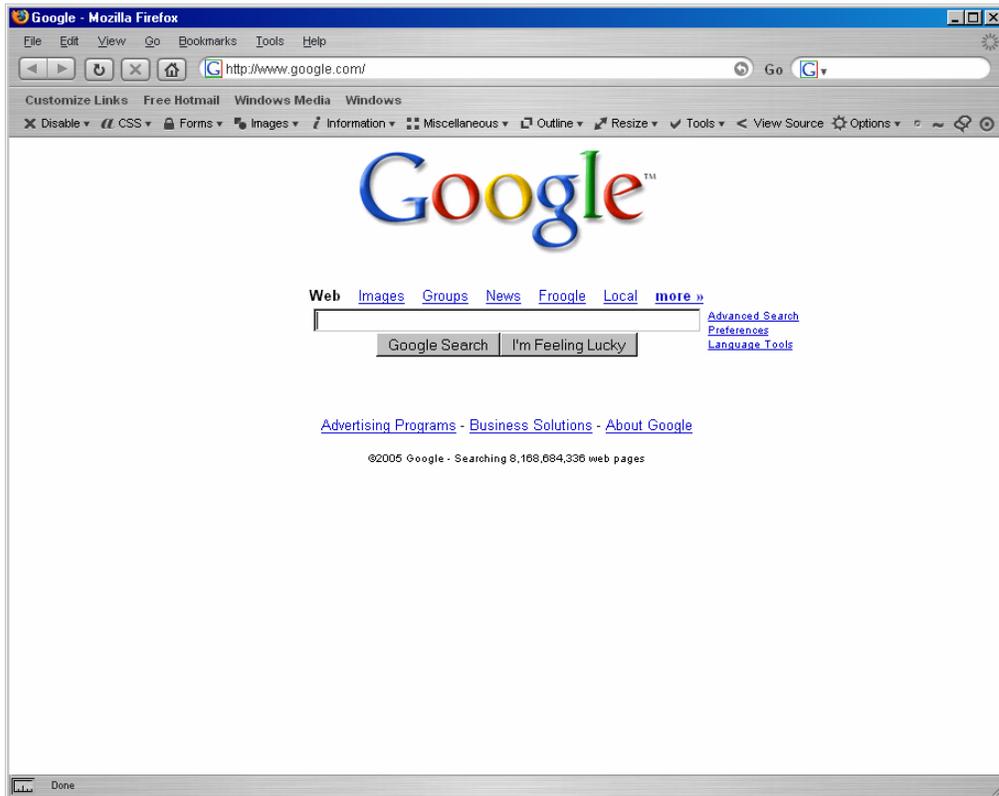


## 2.6.4 Request Documents

Interface to distributed workflow system.

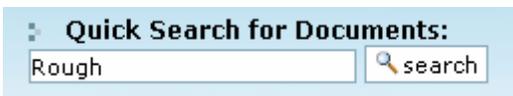
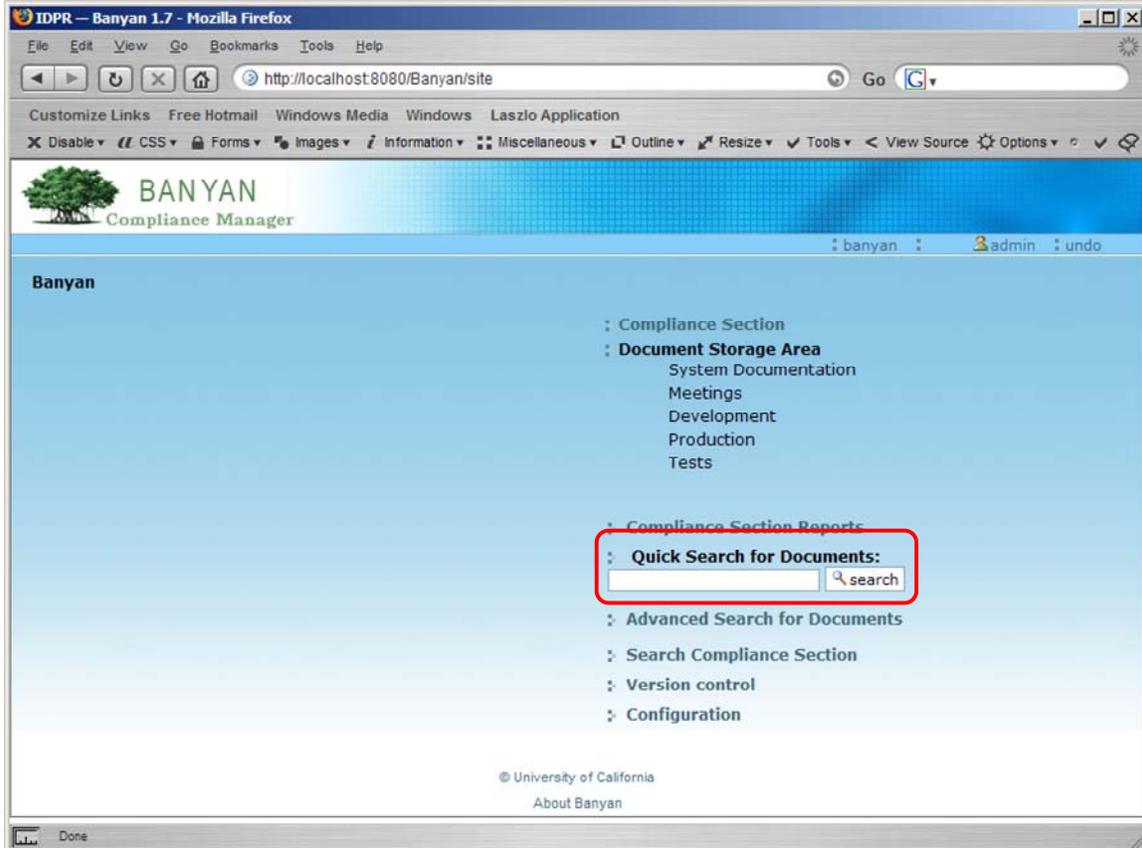


For now this feature is configured to open Google in a new window,

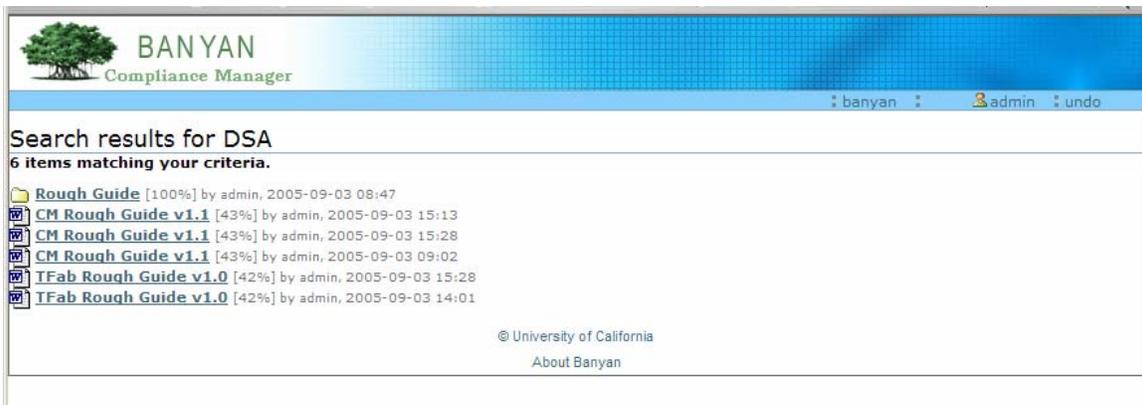


## 3 Searching

### 3.1 Quick Search of Documents



Note: multiple copies are due to copies in baselines



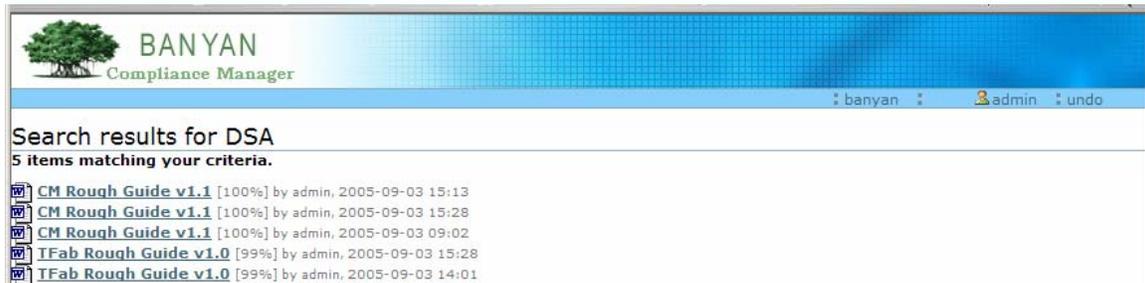
## 3.2 Searching for Content

Looking for the word “Password”

**Quick Search for Documents:**

Password is found within documents

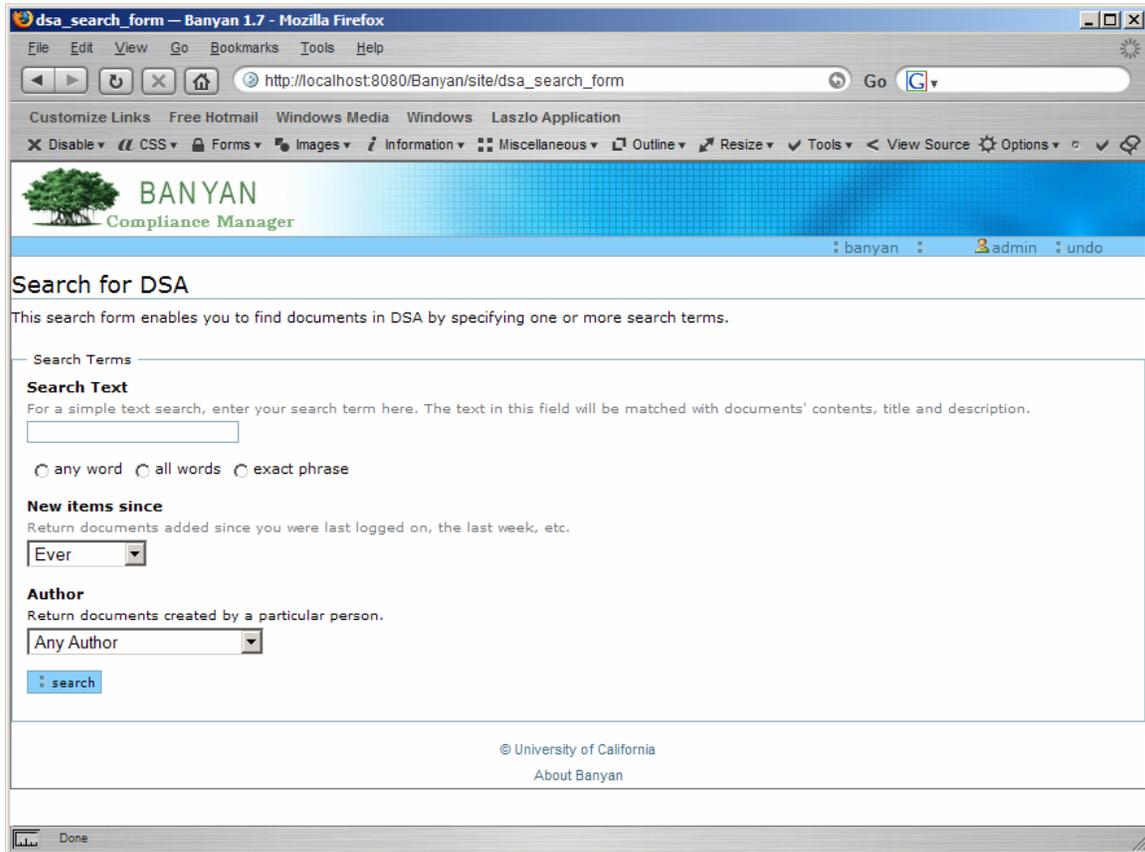


The screenshot shows the BANYAN Compliance Manager interface. The header includes the BANYAN logo and the text "BANYAN Compliance Manager". Below the header, there is a search bar with the text "Search results for DSA" and "5 items matching your criteria." The search results are listed as follows:

- [CM Rough Guide v1.1](#) [100%] by admin, 2005-09-03 15:13
- [CM Rough Guide v1.1](#) [100%] by admin, 2005-09-03 15:28
- [CM Rough Guide v1.1](#) [100%] by admin, 2005-09-03 09:02
- [TFab Rough Guide v1.0](#) [99%] by admin, 2005-09-03 15:28
- [TFab Rough Guide v1.0](#) [99%] by admin, 2005-09-03 14:01

Note, Banyan does not maintain pointers into documents.

### 3.3 Advanced Search for Documents



The screenshot shows a web browser window titled "dsa\_search\_form - Banyan 1.7 - Mozilla Firefox". The address bar shows the URL "http://localhost:8080/Banyan/site/dsa\_search\_form". The browser's menu bar includes File, Edit, View, Go, Bookmarks, Tools, and Help. The toolbar contains navigation buttons (back, forward, home, stop, refresh) and a search engine dropdown. The page content includes the BANYAN Compliance Manager logo and navigation links for "banyan", "admin", and "undo".

**Search for DSA**

This search form enables you to find documents in DSA by specifying one or more search terms.

— Search Terms —

**Search Text**  
For a simple text search, enter your search term here. The text in this field will be matched with documents' contents, title and description.

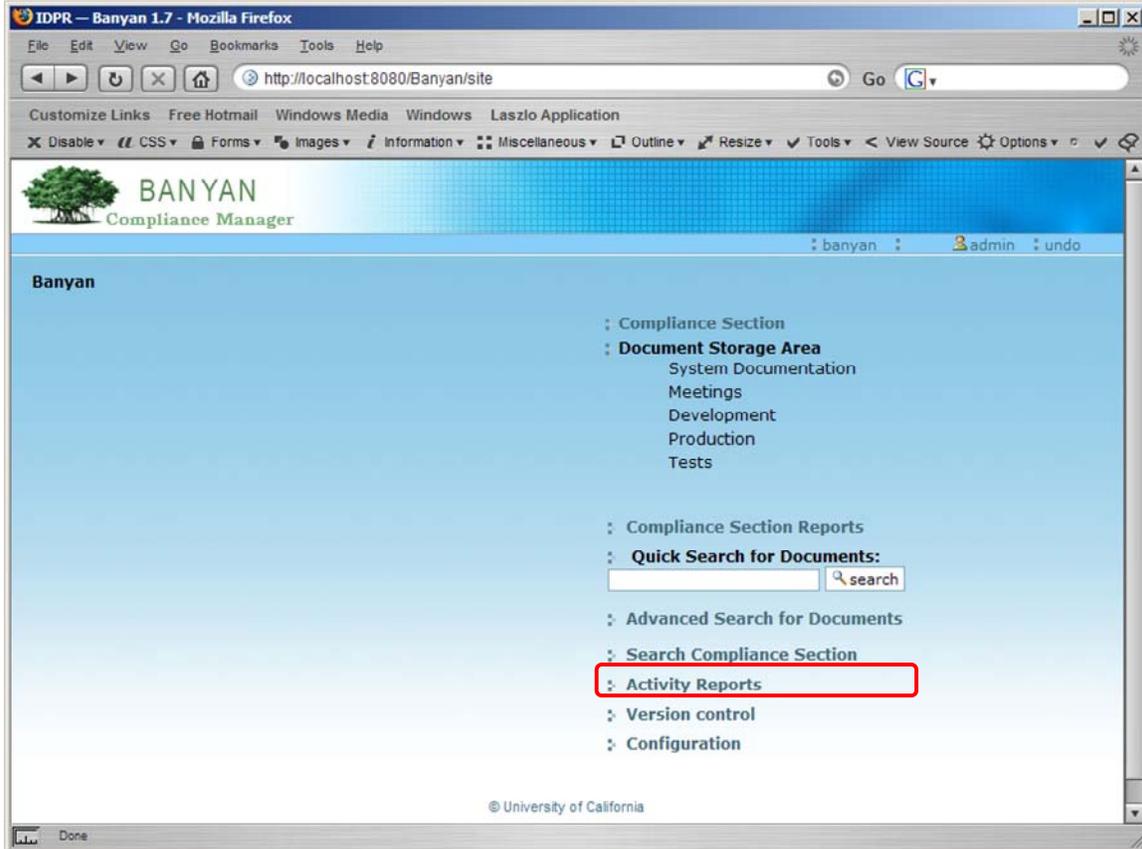
any word  all words  exact phrase

**New items since**  
Return documents added since you were last logged on, the last week, etc.

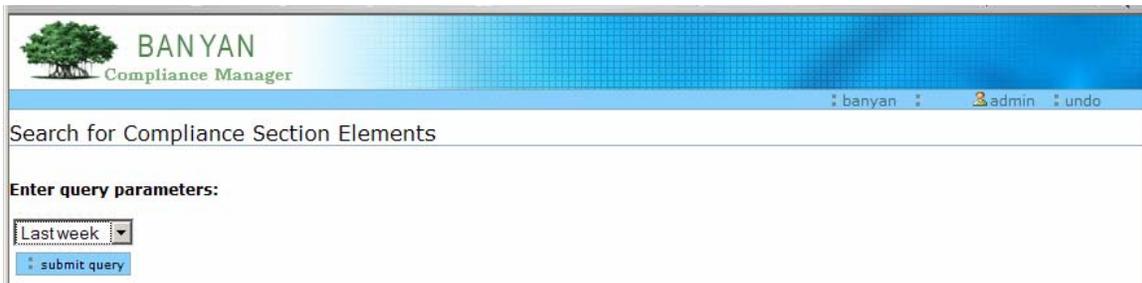
**Author**  
Return documents created by a particular person.

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About Banyan

## 4 Activity Report



Search criteria

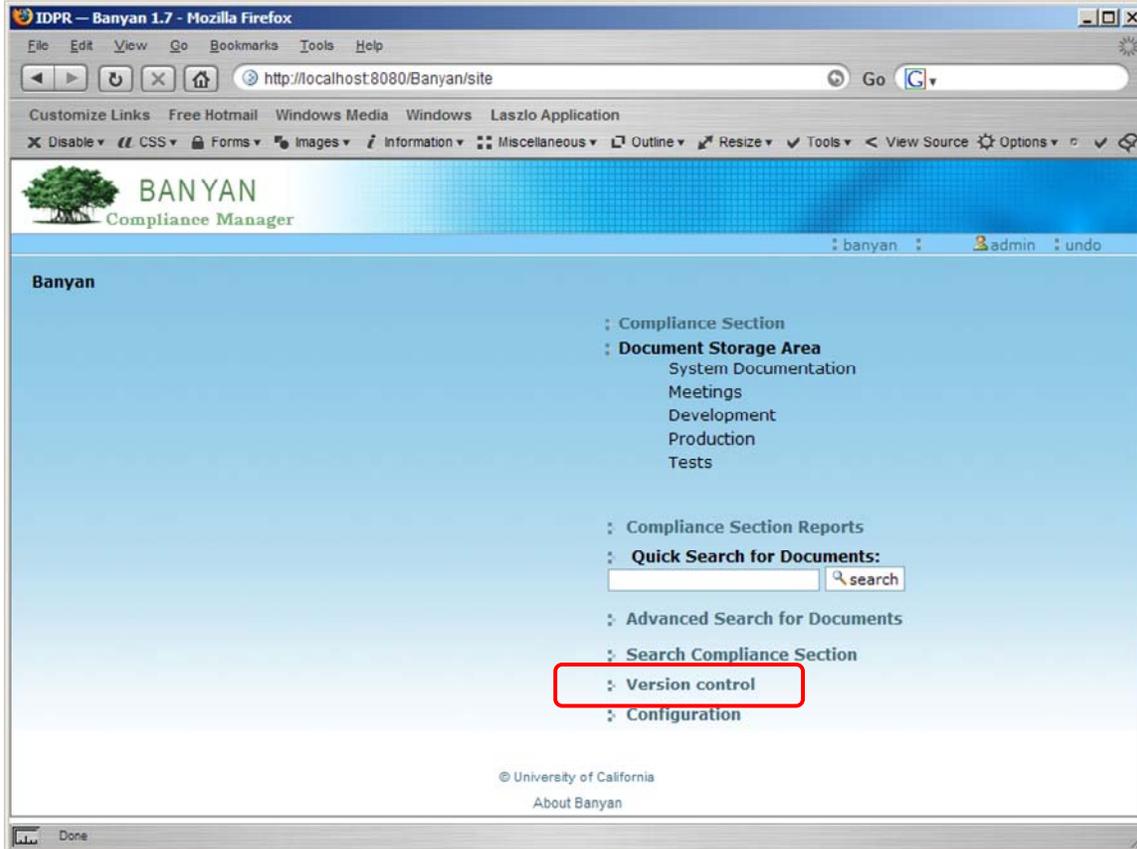




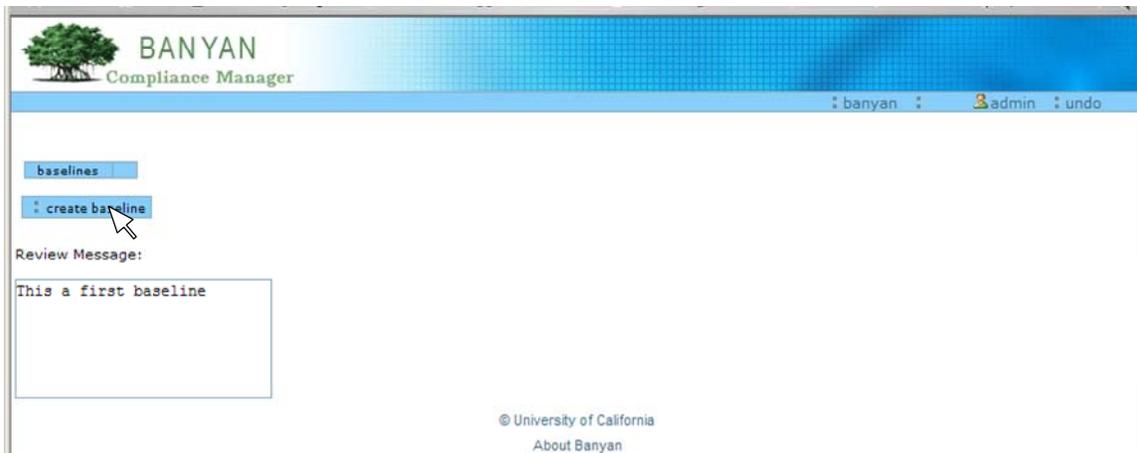
activities

admin added CM Rough Guide v1.1 link to Development on 2005/09/03 13:29:23.265 US/Pacific DocumentStorage > Development
admin added at 2005/09/03 14:38:40.953 US/Pacific Baseline One
admin added at 2005/09/03 15:25:11.484 US/Pacific Baseline Two
Banyan_Contributor added at 2005/09/02 15:51:15.159 US/Pacific
admin added at 2005/09/03 08:47:31.812 US/Pacific DocumentStorage > System Documentation > Rough Guide
admin added CM Rough Guide v1.1 at 2005/09/03 08:59:03.593 US/Pacific DocumentStorage > System Documentation > Rough Guide > CM Rough Guide v1.1
admin added Tfab Rough Guide v1.0 at 2005/09/03 14:00:54.906 US/Pacific DocumentStorage > System Documentation > Rough Guide > Tfab Rough Guide v1.0
admin added Baseline One at 2005/09/03 15:28:30.343 US/Pacific Baseline One
Banyan_Contributor deleted Fol1 on 2005/09/02 15:52:31.505 US/Pacific
Banyan_Contributor deleted Analyses on 2005/09/02 15:53:02.885 US/Pacific
Banyan_Contributor deleted Surveillance on 2005/09/02 15:53:13.275 US/Pacific
Banyan_Contributor deleted R1 on 2005/09/02 15:53:32.472 US/Pacific
Banyan_Contributor deleted R1.1 on 2005/09/02 15:53:32.672 US/Pacific

## 5 Version Control

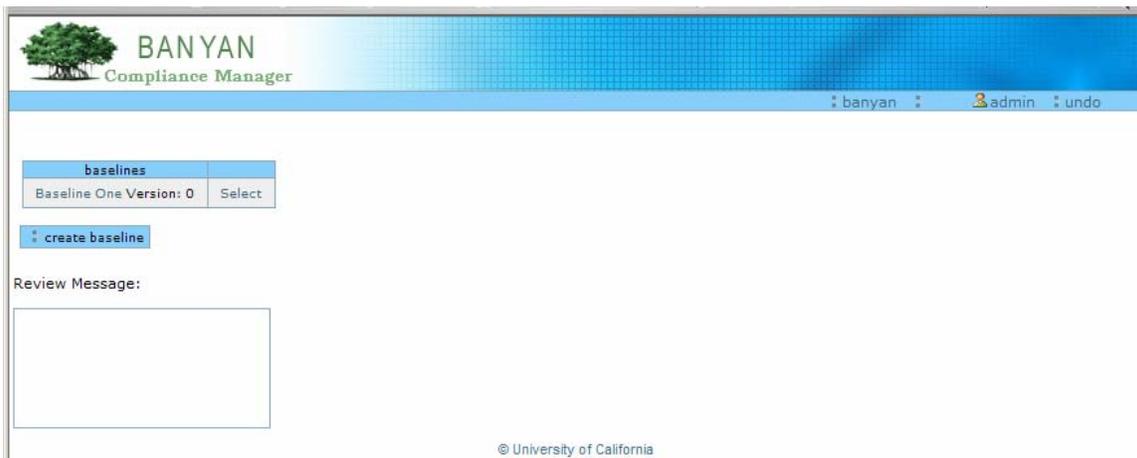


### 5.1 Creating a Baseline

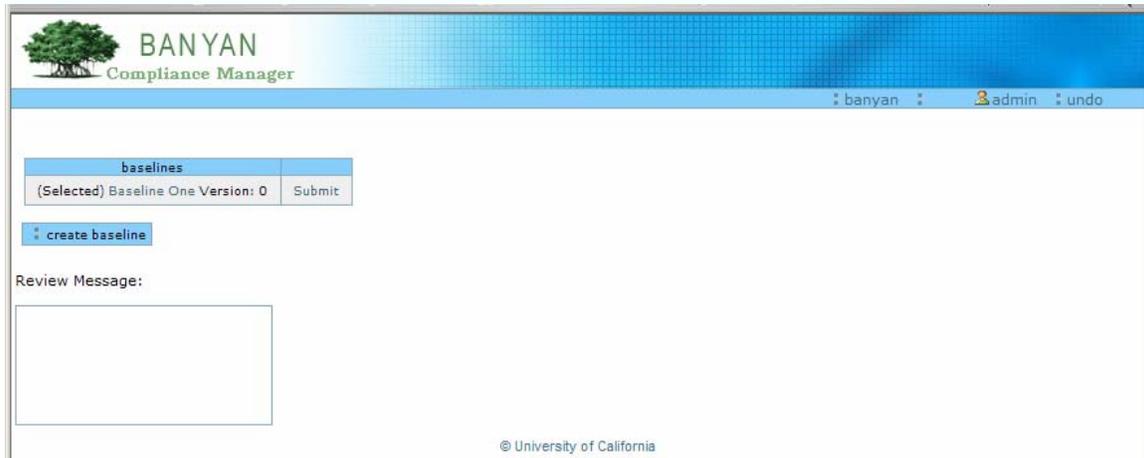




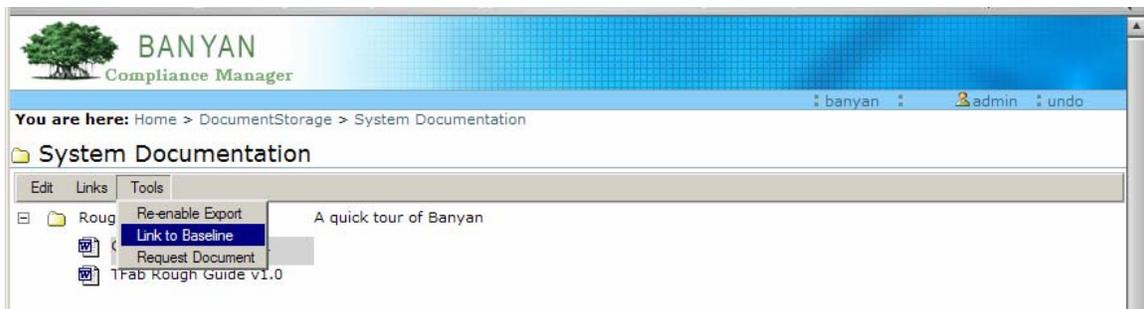
Baseline added



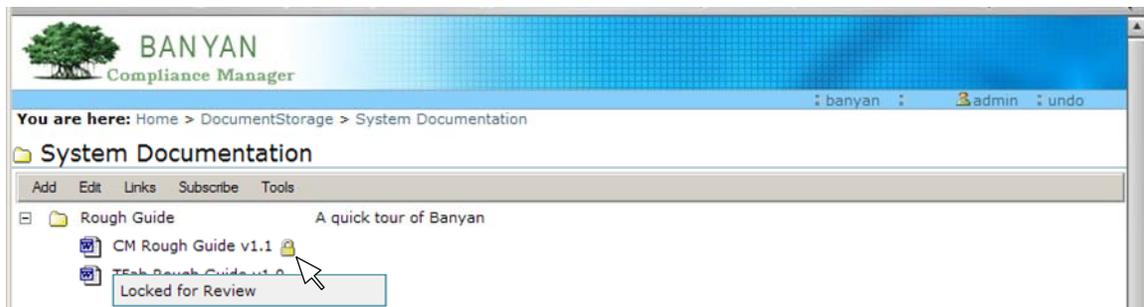
## 5.2 Selecting a Baseline



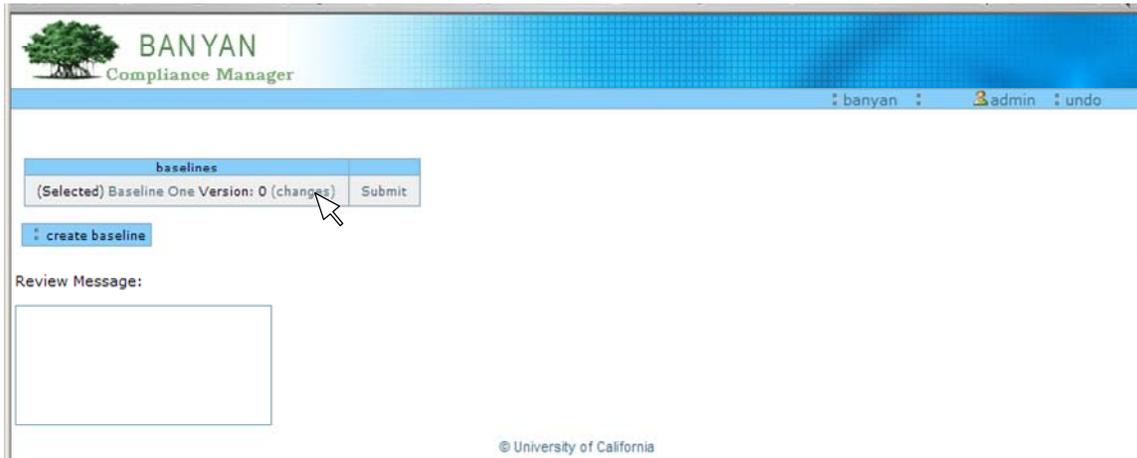
## 5.3 Linking a Document to the Baseline



File is now locked for review



## 5.4 Viewing Proposed Changes to a Baseline



**baselines**

(Selected) Baseline One Version: 0 (changes)	Submit
--	--------

[create baseline](#)

Review Message:

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### Baseline change-set



**changes**

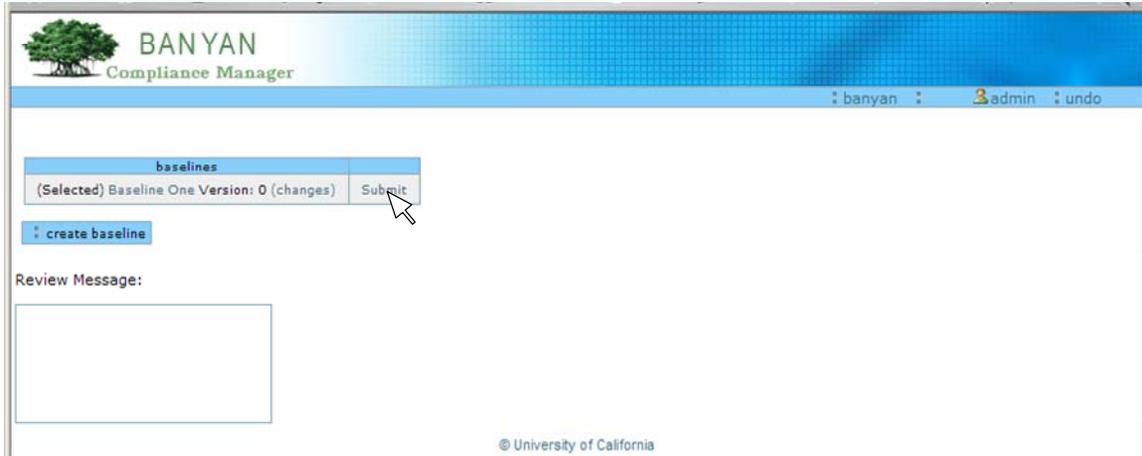
<input type="checkbox"/>	CM Rough Guide v1.1
--------------------------	---------------------

[remove](#)

[Back to Baselines](#)

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About Banyan

## 5.5 Submitting a Baseline

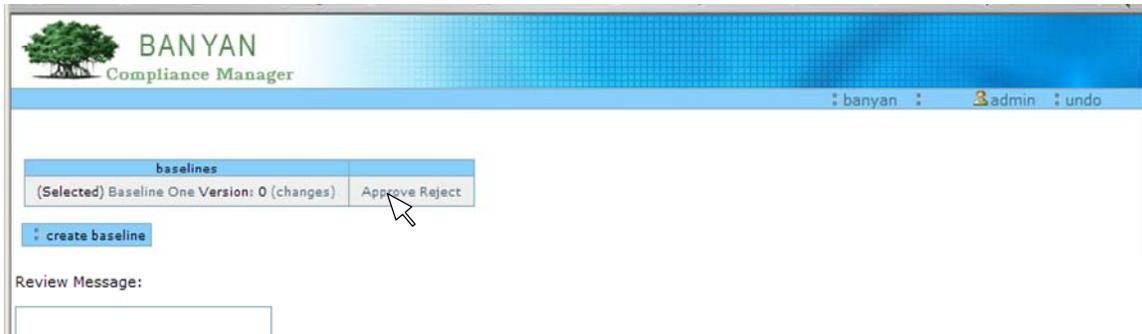


The screenshot shows the BANYAN Compliance Manager interface. At the top, there is a header with the BANYAN logo and the text "BANYAN Compliance Manager". Below the header, there is a navigation bar with "banyan", "admin", and "undo" options. The main content area features a table with the following structure:

baselines	
(Selected) Baseline One Version: 0 (changes)	Submit

Below the table, there is a "create baseline" button and a "Review Message:" label followed by a text input field. At the bottom of the page, there is a copyright notice: "© University of California".

## 5.6 Approving a Baseline – Requires Reviewer Role

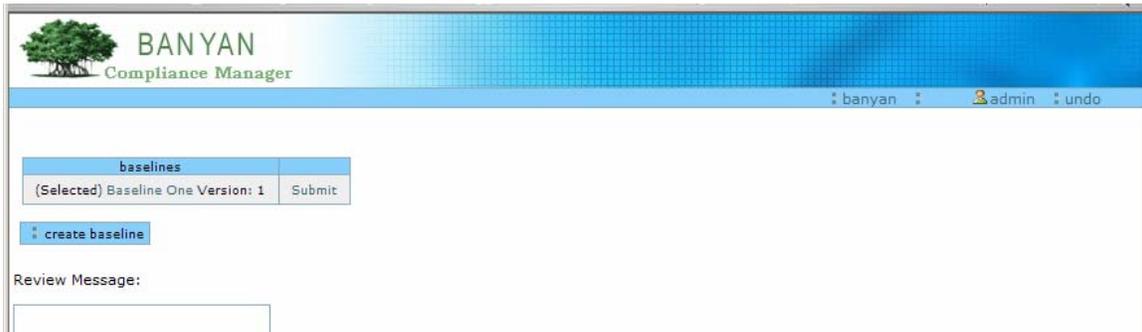


The screenshot shows the BANYAN Compliance Manager interface. At the top, there is a header with the BANYAN logo and the text "BANYAN Compliance Manager". Below the header, there is a navigation bar with "banyan", "admin", and "undo" options. The main content area features a table with the following structure:

baselines	
(Selected) Baseline One Version: 0 (changes)	Approve Reject

Below the table, there is a "create baseline" button and a "Review Message:" label followed by a text input field.

Baseline version is incremented, and the baseline can be resubmitted if changes are made to the new version.

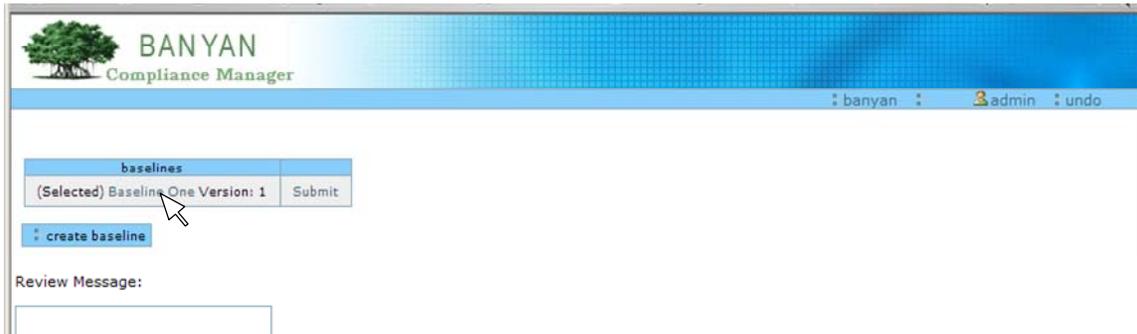


The screenshot shows the BANYAN Compliance Manager interface. At the top, there is a header with the BANYAN logo and the text "BANYAN Compliance Manager". Below the header, there is a navigation bar with "banyan", "admin", and "undo" options. The main content area features a table with the following structure:

baselines	
(Selected) Baseline One Version: 1	Submit

Below the table, there is a "create baseline" button and a "Review Message:" label followed by a text input field.

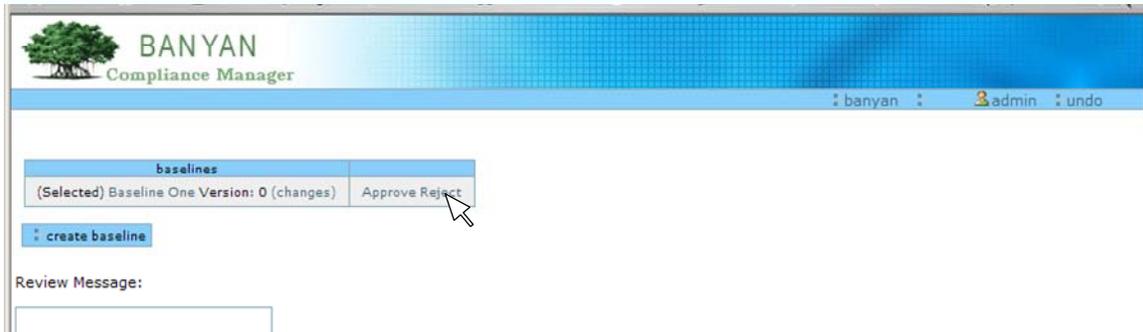
## 5.7 Viewing the Contents of a Baseline



When a baseline is approved, documents in the change-set are transferred to the baseline “container” and the original copies have their locks removed.



## 5.8 Rejecting a Baseline – Requires Reviewer Role



Baseline can be resubmitted

