Banyan 1.7 Compliance Manager
Rough Guide
Version 1.4

R. H. Barter

September 6, 2005
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<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>5.3</td>
<td>Linking a Document to the Baseline</td>
<td>31</td>
</tr>
<tr>
<td>5.4</td>
<td>Viewing Proposed Changes to a Baseline</td>
<td>32</td>
</tr>
<tr>
<td>5.5</td>
<td>Submitting a Baseline</td>
<td>33</td>
</tr>
<tr>
<td>5.6</td>
<td>Approving a Baseline – Requires Reviewer Role</td>
<td>33</td>
</tr>
<tr>
<td>5.7</td>
<td>Viewing the Contents of a Baseline</td>
<td>34</td>
</tr>
<tr>
<td>5.8</td>
<td>Rejecting a Baseline – Requires Reviewer Role</td>
<td>35</td>
</tr>
</tbody>
</table>
1 Getting Started

1.1 Logging On

If you are using Banyan from a server, 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:

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

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.
2 Document Storage Area

2.1 System Documentation

2.2 Add
2.2.1 Add Folder

Produces:
2.2.2 Add File

Select Folder

Add File

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

Click Save
2.2.3 Add a zip file

The zip file specified will be uploaded to the server and unzipped. Each file in the zip file will be added to the current workspace as a separate file. The name of the file(s) in the zip file will become the title(s) of the file in the workspace.

If you leave this box checked, then all of the uploaded files will have their Export boxes checked by default.

You can always go in and modify the checkboxes for each of the uploaded files after the files have been uploaded.

begin batch upload
2.2.4 Add a Collection

Title:

File:

Note:
The zip file specified will be uploaded to the server and unzipped. Each file in the zip file will be added to the current workspace as a separate file. The name of the file(s) in the zip file will become the title(s) of the file in the workspace.

Export

Upload collections
2.3 Edit

2.3.1 Title and Description

![Edit Interface]

**Folder Details**

**Title**

Rough Guide

**Description**

A quick tour of Banyan

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2.3.2 Edit Metadata

![Image of Banyan system documentation interface]

![Image of Banyan metadata editing interface]

[banyan_metadata]

Description
A quick tour of Banyan

DsaCreator

DsaSubject

DsaPublisher

DsaContributor

DsaDate

DsaResourceType

DsaFormat

DsaLanguage

DsaRelation

DsaCoverage

DsaRights

Save
2.3.3 Cut/Copy/Paste/Delete

2.3.4 Undo
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

These are the items that you are currently subscribed to.
To unsubscribe, click on the checkbox next to the folder and click on unsubscribe.

<table>
<thead>
<tr>
<th>object title</th>
<th>unsubscribe</th>
</tr>
</thead>
<tbody>
<tr>
<td>Development</td>
<td></td>
</tr>
</tbody>
</table>

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About Banyan
2.6 Tools

2.6.1 Change Display Order

![Change Display Order screenshot](image1)

![Rough Guide screenshot](image2)
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”

Password is found within documents

Note, Banyan does not maintain pointers into documents.
3.3 Advanced Search for Documents

![Advanced Search for Documents](image)

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

- **Search Term**
  - **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.

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

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

- **Search**

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About Banyan

Page 26
4 Activity Report

Search criteria
<table>
<thead>
<tr>
<th>Time</th>
<th>User</th>
<th>Action</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005-09-02 14:34:45</td>
<td>admin</td>
<td>Added CM Rough Guide v1.1 links to Development</td>
<td>2005-09-02 14:34:45 Pacific DocumentStorage &gt; Development</td>
</tr>
<tr>
<td>2005-09-02 14:00:54</td>
<td>admin</td>
<td>Added TFd Rough Guide v1.0 links to Development</td>
<td>2005-09-02 14:00:54 Pacific DocumentStorage &gt; Development</td>
</tr>
<tr>
<td>2005-09-02 09:02:31</td>
<td>Banym</td>
<td>Added baseline One to Development</td>
<td>2005-09-02 09:02:31 Pacific DocumentStorage &gt; Development</td>
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<td>2005-09-02 09:02:31 Pacific DocumentStorage &gt; Development</td>
</tr>
</tbody>
</table>
5 Version Control

5.1 Creating a Baseline
Add a Baseline Folder

Folder Details

Title: Baseline One

Description
A brief description of the item.
This is a test baseline

Save

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

Baseline change-set
5.5 Submitting a Baseline

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

5.6 Approving a Baseline – Requires Reviewer Role
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