



Western Mindanao State University - External Studies Unit

# WMSU - ESU DOCUMENT TRACKER

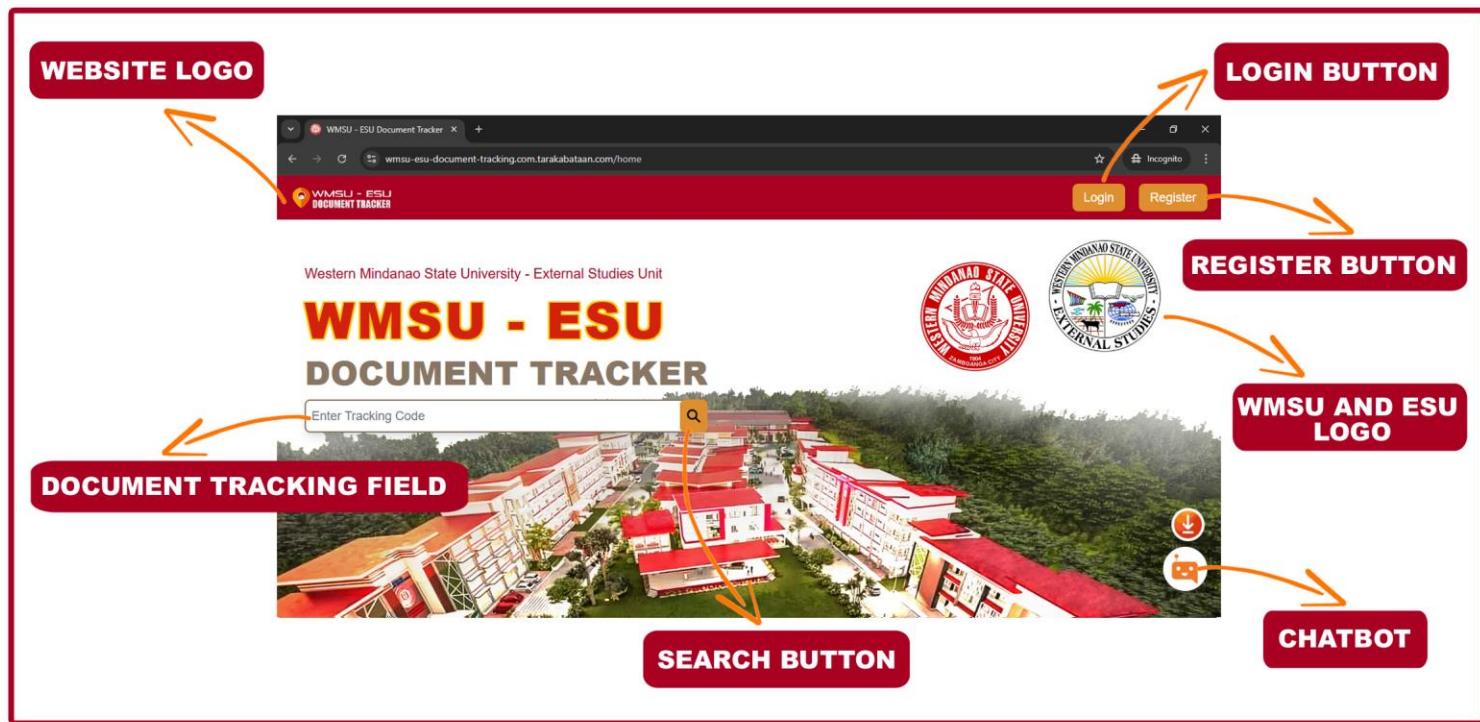
# USER MANUAL



# WMSU-ESU Document Tracker User Manual

## Homepage Overview

The WMSU-ESU Document Tracker is a web-based system designed to allow users to easily track and monitor documents submitted through the Western Mindanao State University - External Studies Unit (WMSU-ESU). This manual will guide you through the key functionalities of the system and explain how to use them effectively.



## How to Use the Document Tracking System?

### Step 1: Visit the Website

Open your preferred web browser and go to the WMSU-ESU Document Tracker page.

URL: <https://wmsu-esu-document-tracking.com.tarakabataan.com/>

### Step 1: Login or Register (if applicable)

- If you already have an account, click the Login button at the top right corner of the screen.
- For Faculty users:
  - Click **Register button** to create an account. Follow the instructions and provide the necessary information.
  - Note that upon registration, your account will be “**Pending**” awaiting approval from the *campus registrar, campus admin, or the DEAN of ESU*. Only faculty members are allowed to register.

### Step 3: Enter Tracking Number

- To track a submitted document, enter the tracking number you received in the "Enter Tracking Number" field on the homepage.

# WMSU-ESU Document Tracker User Manual

## HOW TO USE THE DOCUMENT TRACKING SYSTEM?

### Step 4: Track Your Document

- After entering the tracking number, click the Search Icon/button (magnifying glass) to see the current status of your document in real time.

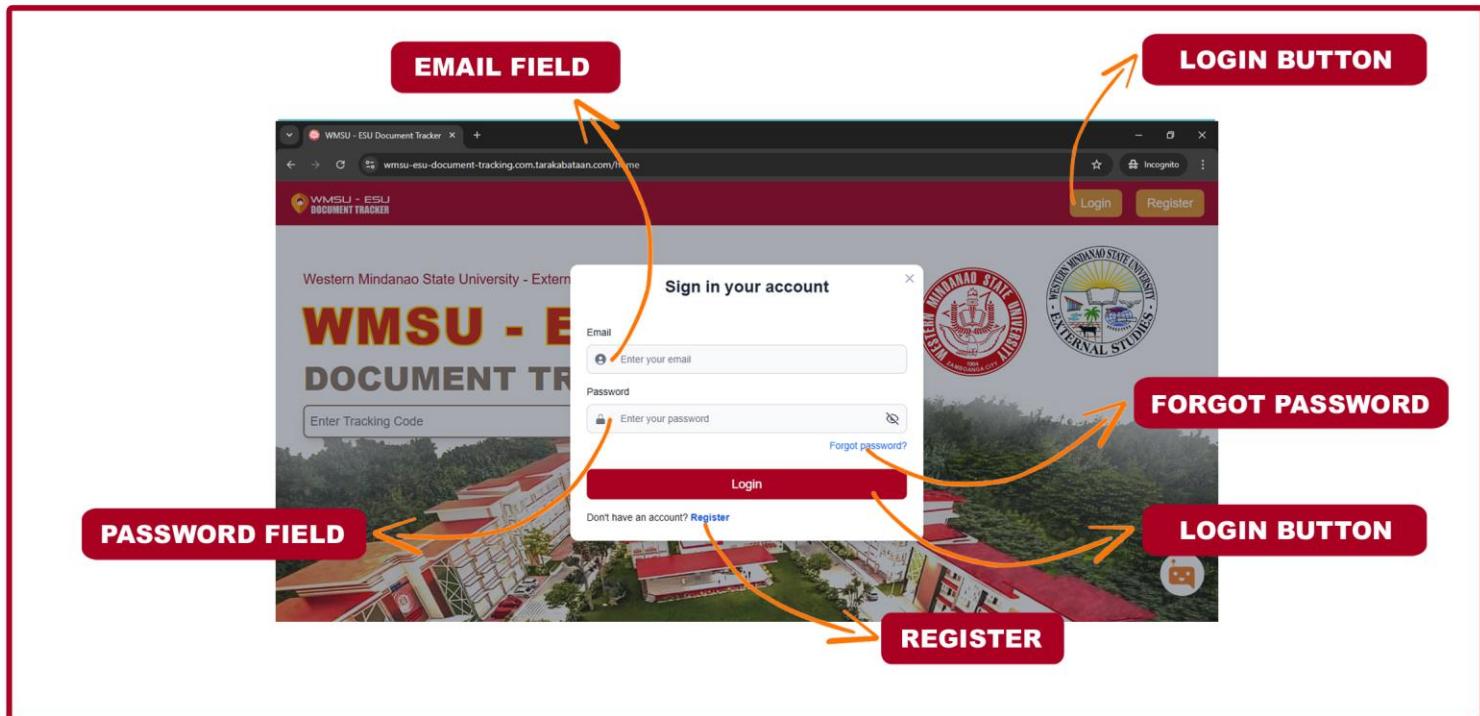
## HELP/SUPPORT (CHATBOT)

Located at the bottom-right corner, there is an orange *Chatbot* icon for users who need assistance. The chatbot can guide you through common tasks like tracking documents, uploading documents, or registering an account.

## ACCOUNT APPROVAL PROCESS

**Faculty Members:** Once you register your account, it will remain on hold until it is approved by the campus registrar, campus admin, or the DEAN of ESU. This process ensures only verified faculty can access the system.

**Offices:** Designated office accounts will be created by the DEAN of ESU. Your office will receive a designated account with the information you provided.



## LOGIN GUIDE

**Step 1. Access the Login Form:** On the homepage, click the **Login button** located at the top-right corner of the screen.

**Step 2. Enter Your Credentials**

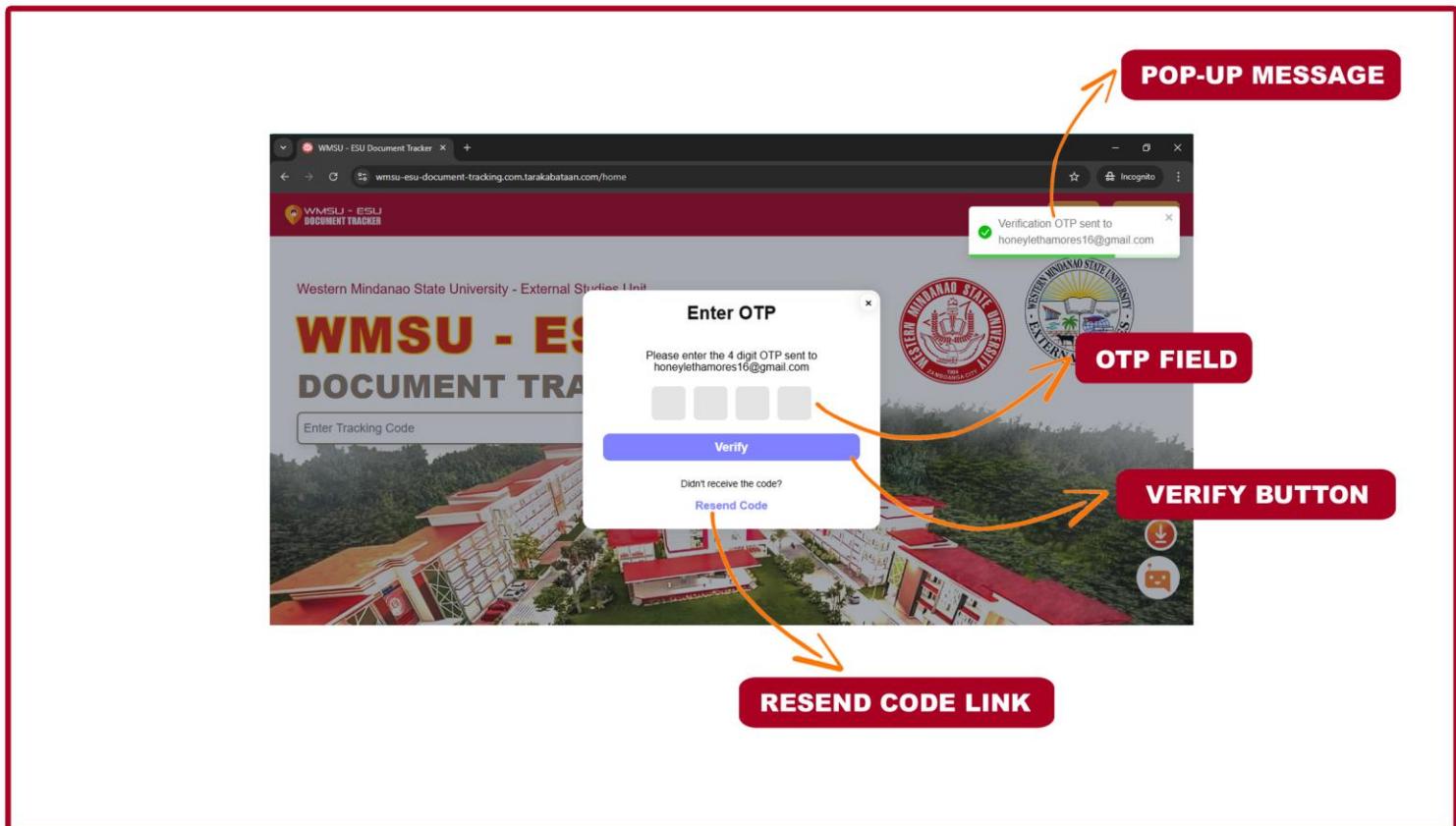
Email: Input the email address associated with your WMSU-ESU Document Tracker account in the **Email field**.

# WMSU-ESU Document Tracker User Manual

## Step 2. Enter Your Credentials

**Password:** Input the password associated with your WMSU-ESU Document Tracker account in the **Password field**.

**Step 3. Login:** After entering your email and password, click the red **Login button**. The system will automatically send an OTP to your registered email address.



**Step 4. "Enter OTP" Overlay Page:** After the OTP is sent, an overlay page titled "**Enter OTP**" will appear. This page will display a field where you can enter the OTP sent to your email. You will see a pop-up message on the screen indicating that a verification OTP has been sent to your registered email address.

**Step 5. Entering the OTP:** In the **OTP Field**, enter the 4-digit OTP that was sent to your email. If you have not received the OTP, double-check your email's Spam or Junk folder.

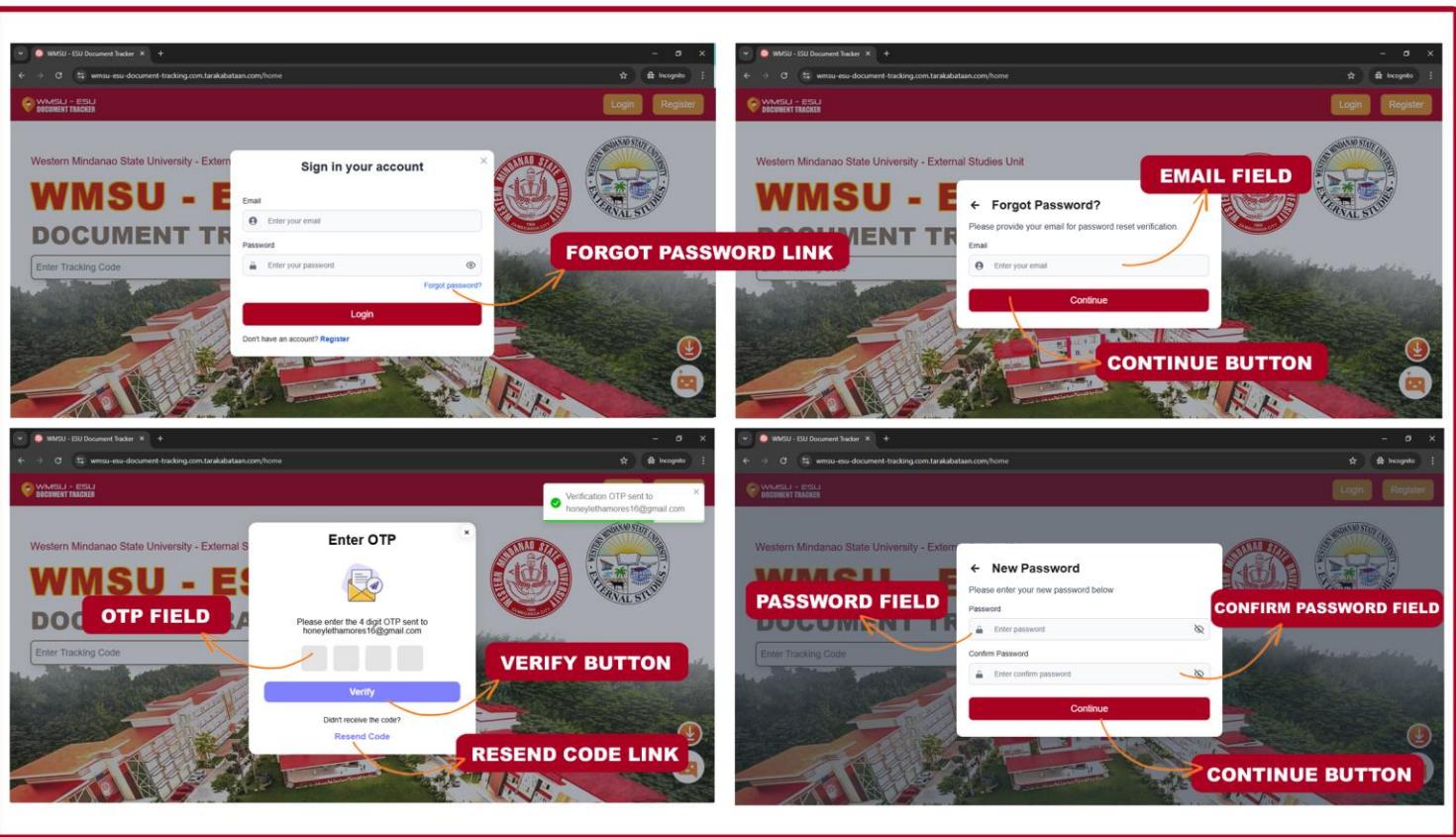
## Step 6. Verifying the OTP:

- After entering the OTP, click the **Verify button** to submit it for verification. If the OTP is correct, a pop-up message will appear indicating a successful login to your account.
- Simultaneously, you will be navigated to your profile page.

**Step 7. Resend Code Option:** If you do not receive the OTP within a few minutes, you can request a new OTP by clicking the **Resend Code link** located below the verify button.

# WMSU-ESU Document Tracker User Manual

## FORGOT PASSWORD GUIDE



**Step 1. Forgot Password:** Upon clicking or tapping the ***Forgot password link***, an overlay “Forgot Password?” page will appear.

**Step 2. Enter Your Email:** A new screen will appear asking for your email address. Enter the email address associated with your account in the ***Email Field***. Click the ***Continue button*** to proceed.

**Step 3. Check Your Email for OTP:** After submitting your email, you’ll receive a one-time password (OTP) in your email. Open your email inbox and find the email with the OTP code.

**Step 4. Enter the OTP:** Go back to the website and enter the OTP in the ***OTP Field***. Click the ***Verify button*** to confirm the code. If you did not receive the OTP, click ***Resend Code link*** to have another one sent to your email.

**Step 5. Set a New Password:** Once the OTP is verified, you’ll be directed to the “New Password” page. Enter your new password in the ***Password Field*** and re-enter it in the ***Confirm Password Field***. Click the ***Continue button*** to save your new password.

**Step 6. Login with Your New Password:** Return to the login screen and sign in using your new password.

# WMSU-ESU Document Tracker User Manual

## ACCOUNT REGISTRATION GUIDE (FOR FACULTIES ONLY)

The screenshot shows two views of the registration process. The top view is the 'Sign up your account' page with various input fields: First Name, Last Name, Middle Initial, Email Address, Contact Number, Date Picker, Designation Dropdown, ESU Campus Dropdown, Password Field, and Confirm Password Field. A 'Register' button is at the bottom. Labels with arrows point to the Last Name Field, Upload Display Picture, Middle Initial Field, Email Address Field, Contact Number Field, Designation Dropdown Field, and Confirm Password Field. The bottom view shows a 'Enter OTP' pop-up with fields for entering the OTP, a Verify button, and a Resend Code link. A 'Verification OTP sent to honeyelhamores1@gmail.com' message is displayed above the pop-up. Labels with arrows point to the OTP Field, Verify Button, and Resend Code Link. A 'POP-UP MESSAGE' label points to the top right of the screen.

**Step 1. Open Registration (Sign up your account) Page:** Click on the 1: **Register button** at the top-right corner of the page.

**Step 2. Upload a Profile Picture:** Click or tap the camera icon and upload a photo from your device, which will then be displayed as your profile picture within the system.

**Step 3. Fill Out the Registration Form:**

**First Name Field:** Enter your first name.

**Last Name Field:** Enter your last name.

**Middle Initial Field:** Enter your middle initial if applicable.

**Email Address Field:** Provide a valid email address. This will be used for account notifications and password recovery.

**Date Picker:** Select your birth date using the calendar icon.

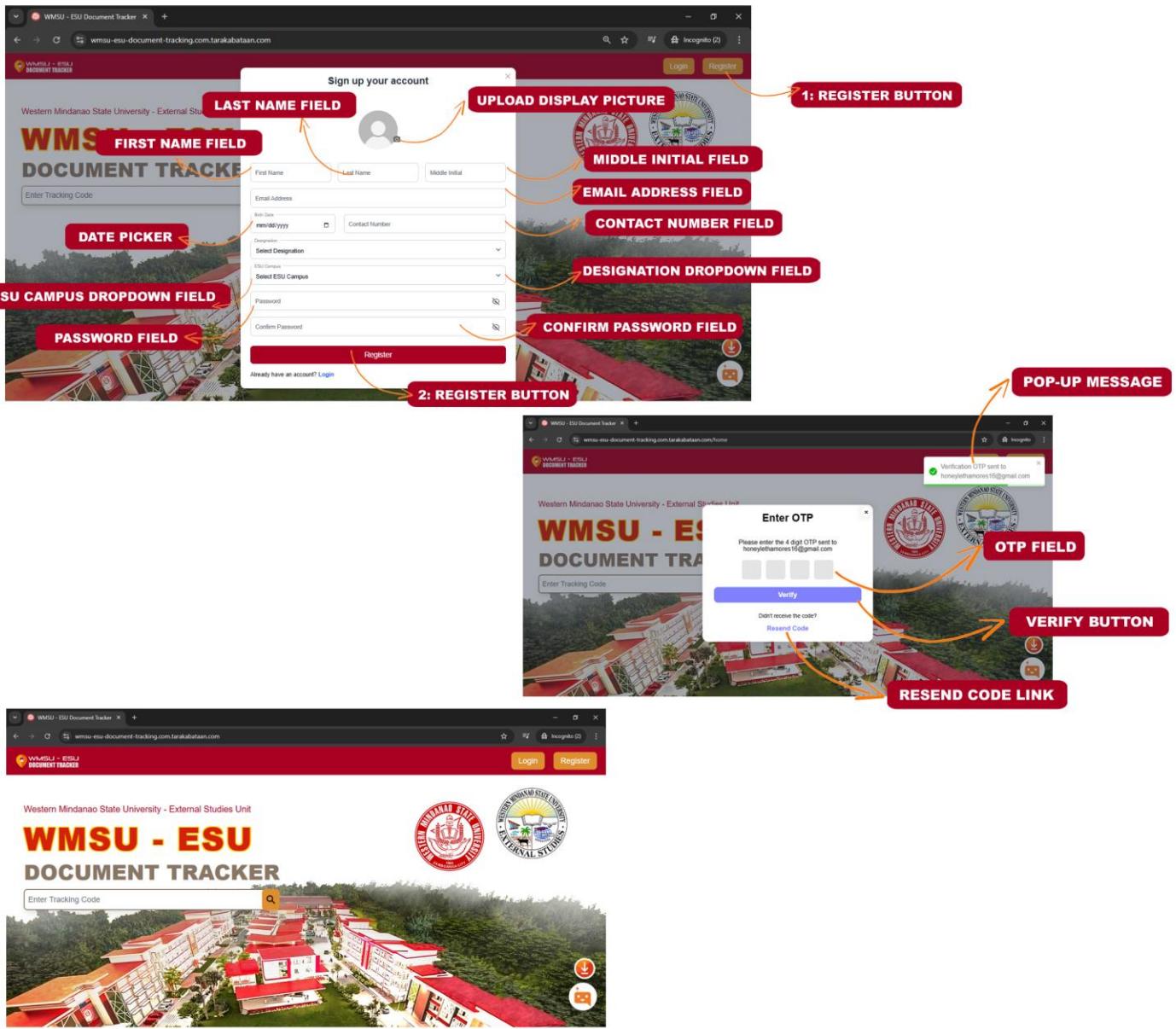
**Contact Number Field:** Enter your contact number.

**Designation Dropdown Field:** Choose your designation from the dropdown list.

**ESU Campus Dropdown Field:** Select your campus from the dropdown list.

**Step 4. Create a Password:** Enter your password in the **Password Field** and re-enter it in the **Confirm Password Field**. And lastly, click or tap the 2: **Register button** to verify your email address and register your account. The system will automatically send an OTP to your registered email address.

# WMSU-ESU Document Tracker User Manual



**Step 5. "Enter OTP" Overlay Page:** After the OTP is sent, an overlay page titled "**Enter OTP**" will appear. This page will display a field where you can enter the OTP sent to your email. You will see a pop-up message on the screen indicating that a verification OTP has been sent to your registered email address.

**Step 6. Entering the OTP:** In the **OTP Field**, enter the 4-digit OTP that was sent to your email. If you have not received the OTP, double-check your email's Spam or Junk folder.

## Step 7. Verifying the OTP:

- After entering the OTP, click the **Verify button** to submit it for verification. If the OTP is correct, a pop-up message will appear, indicating that your account has been successfully registered. You will then be automatically redirected to the website's home page.

**Step 8. Resend Code Option:** If you do not receive the OTP within a few minutes, you can request a new OTP by clicking the **Resend Code link** located below the verify button.

# WMSU-ESU Document Tracker User Manual

## DOCUMENT UPLOAD GUIDE

The screenshot illustrates the 'Upload Documents' process. It starts with the sidebar 'UPLOAD DOCUMENTS' containing 'Upload Documents' which leads to the main 'Upload' screen. The main screen has a 'BACK BUTTON' and a 'GENERATE CODE BUTTON'. The 'Document Information' section includes a 'Tracking Code' field with a 'Generate Code' button, an 'Uploaded By' field showing 'Honeyleth A. Amores', and a 'Document Name' field. The 'Document Type' dropdown is set to 'IOR (Internal Office Reports)'. The 'Document Route' dropdown lists several offices: WMSU-ESU IPIL FACULTY, WMSU-ESU IPIL REGISTRAR, DEAN OF EXTERNAL STUDIES UNIT OFFICE, VICE PRESIDENT FOR ACADEMIC AFFAIRS OFFICE, HUMAN RESOURCE OFFICE, ACCOUNTING OFFICE, and RECORDS OFFICE. The 'File Type' dropdown is set to 'Soft Copy'. The 'DOCUMENT DESCRIPTION FIELD' is labeled as 'Enter document description'. The 'FILE TYPE DROPODOWN FIELD' is labeled as 'Select File type' with options 'Soft Copy' and 'Hard Copy'. The 'DOCUMENT DESCRIPTION FIELD' is labeled as 'Enter document description'. The 'SELECT ROUTE DROPODOWN FIELD' is labeled as 'Select Route'. The 'DELETE BUTTON' is located next to the 'ROUTE' dropdown. The 'CANCEL BUTTON' and 'UPLOAD BUTTON' are at the bottom right of the main form.

**Step 1: Access the Upload Documents Page:** On the left sidebar, click on **Upload Documents** to access the document upload page.

### Step 2: Fill Out Document Information

- 1. Tracking Code:** Click the **Generate Code button** to create a unique tracking code for the document. This code will be used to track the document within the system.
- 2. Uploaded By:** This field should automatically display the name of the logged-in user.
- 3. Document Name:** Enter a descriptive name for the document in the **Document Name field**.

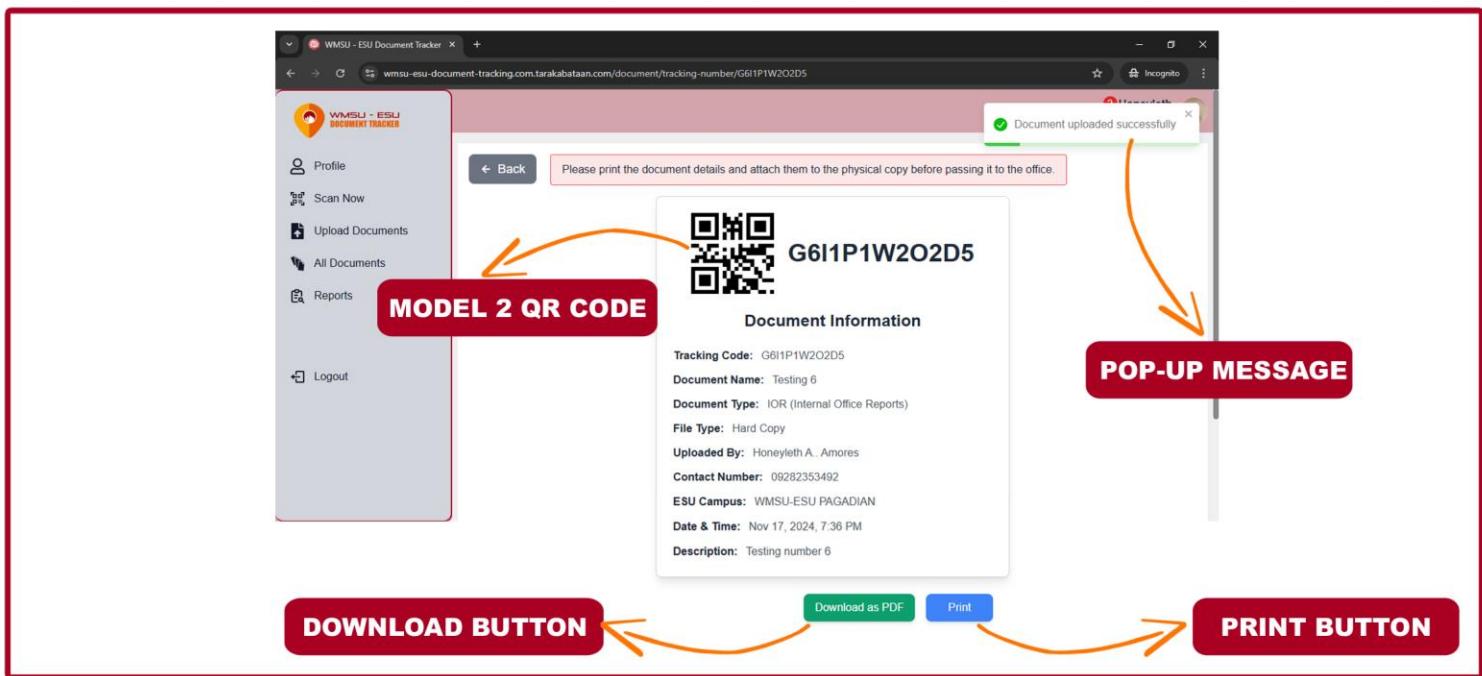
# WMSU-ESU Document Tracker User Manual

## DOCUMENT UPLOAD GUIDE

### Step 2: Fill Out Document Information

4. **Document Type:** Use the dropdown menu to select the type of document you are uploading. Choose the option that best describes the document.
5. **Document Route:** Click or tap the **Select Route Dropdown Field** to modify the submission route of the document. You can also click the **Delete Button** to remove any offices that do not need to receive your document.
6. **File Type:** Click or tap the **File Type dropdown field** to select the document type (soft copy or hard copy). If you choose "soft copy," you can upload your file. Ensure that it is in one of the following formats: PDF, PPT, DOC, DOCX, CSV, JPG, PNG, or GIF.
7. **File Type:** Click or tap the **Document Description Field** to input brief description of the document. This should provide additional information about your document's content.

**Step 4: Upload the Document:** Review the information entered in all fields. When ready, click the **Upload Button** at the bottom of the page to upload the document. To cancel, click or tap the **Cancel Button**.



After uploading a document, the system displays the **Document Information** page.

**Model 2 QR Code:** This QR code is generated for the document and can be scanned to quickly access its details in the system. It also enables offices to easily scan and receive the document, updating its status in the document route.

**Pop-up Message:** A green pop-up message, "Document uploaded successfully," confirms that your document has been uploaded. This message will disappear shortly after displaying.

**Download Button:** Click the **Download button** to save a PDF version of the document details. This PDF includes the QR code and all document information.

**Print Button:** Click the Print button to print a hard copy of the document information. Attach this printed sheet to the physical document if submitting it to the office.

# WMSU-ESU Document Tracker User Manual

## RECEIVING A HARD COPY DOCUMENT

### Step 1: Uploading and Printing

After the uploader (sender) completes the upload of the document's metadata into the system, they print the Document Information page, which includes a QR code specific to the document.

### Step 2: Attaching and Passing

The uploader attaches the printed Document Information page to the physical documents they are submitting. They then pass these documents to the office that needs to receive them.

### Step 3: Receiving Office Access

- The receiving office scans the QR code on the attached Document Information page to access the document's details in the system.
- If a camera is unavailable on their device, they can manually enter the tracking code provided on the Document Information page to retrieve the document details.

### Step 4: Making Changes and Sending Back

- If the receiving office determines that changes or corrections are needed, they *scan the QR code (or re-enter the tracking code)*.
- They then click **Return button** in the system, which updates the document's status and sends it back to the previous office (the uploader) for revisions.
- The physical documents are also returned to the sender's office to allow for necessary changes.

### Step 4: Repeating the Process

This process can continue as necessary, allowing offices to communicate back and forth by updating the document's status and tracking details in the system, while physically moving the documents with attached information between offices.

## RECEIVING A SOFT COPY DOCUMENT

### Step 1: Notification of Incoming Document

When a new document is sent to an office, the receiving office is notified of the incoming document in the system.

### Step 2: Accessing Document Details

- The receiver copies the tracking number from the document details provided in the notification.
- They navigate to the Scan Now page in the system and either enter the tracking code manually or scan the QR code (if available) to access the document's status and details.

# WMSU-ESU Document Tracker User Manual

## RECEIVING A SOFT COPY DOCUMENT

### Step 3: Receiving the Document

Once the tracking code is entered or the QR code is scanned, the receiver clicks or taps the **Receive button**. This updates the document's status to show that it has been officially received by their office.

### Step 4: Making Changes, Returning, or Forwarding

- If the receiving office needs to make changes to the document, or if they need to return it or forward it to the next office, they can scan the document again (or re-enter the tracking code).
- After accessing the document, they select either the **Return** option to send it back to the sender for revisions, or **Forward** to send it onward to the next office in the workflow.

### Step 5: Repeating the Process as Needed

This process allows continuous tracking and updates of the document's status. Each time the document needs to be moved back or forward, the receiver re-scans or re-enters the tracking code and updates the status accordingly.

## HANDLING RETURNED DOCUMENTS (HARD OR SOFT COPY)

### Step 1: Receiving Returned Documents

When a document is returned, the faculty scans the attached QR code or enters the tracking code in the system. After scanning, click the **Receive** button to mark the document as received in the system.

### Step 2: Updating or Revising Document Details

- The faculty makes the necessary updates or revisions to the document's details as requested by the returning office.
- For soft copy documents, they can directly edit the document details in the system and upload the revised document if needed.

### Step 3: Forwarding the Document

- Once the updates or revisions are complete, the faculty scans the QR code (or re-enters the tracking code) again.
- This time, they select the **Forward** button to send the document to the next office, such as the registrar or campus admin.