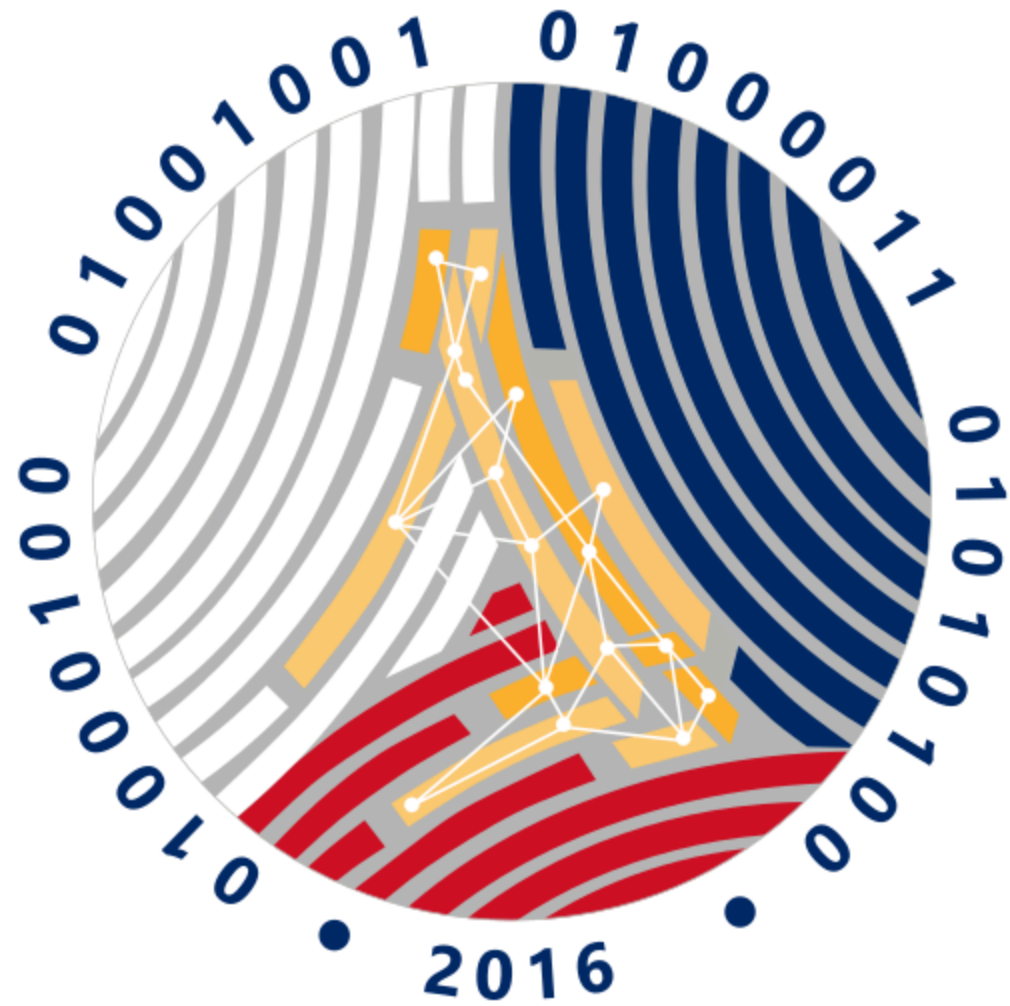


DOCUMENT TRACKING SYSTEM



DICT

DICT XI

Documentation Tracking System

SOFTWARE OPERATIONS MANUAL

Introduction

Welcome to the user manual for Document Tracking System (DTS). This manual is designed to guide you through the various features and functionalities of the system, ensuring you can effectively manage, track, and collaborate on documents within your organization. Whether you're a user sending documents, an admin managing the system, or a personnel receiving and processing documents, this manual will provide you with the necessary instructions and insights to navigate the system.

Overview

Document Tracking System is a comprehensive tool designed to streamline the process of document management. It offers a centralized platform for uploading, organizing, and tracking documents, ensuring that all team members have access to the information they need, when they need it. The system supports collaboration, allowing multiple users to work on documents simultaneously.

Purpose

The primary purpose of the Document Tracking System is to simplify the management of documents within the organization. By centralizing document storage and providing a unified platform for collaboration, the system aims to reduce the time and effort required to locate, review, and approve documents.

User Description

User

Individuals within the organization who send documents to specific personnel for review, approval, or action.

Responsibilities:

- **Sending Documents**

Functionalities:

- **Upload and Send**

Admin

Responsible for managing the system, including users, personnels, and departments, They have full control over the system's configuration and data.

Responsibilities:

- **User Management**
- **Personnel Management**
- **Department Management**

Functionalities:

- **User CRUD Operations**
- **Personnel CRUD Operations**
- **Department Management**

Personnels

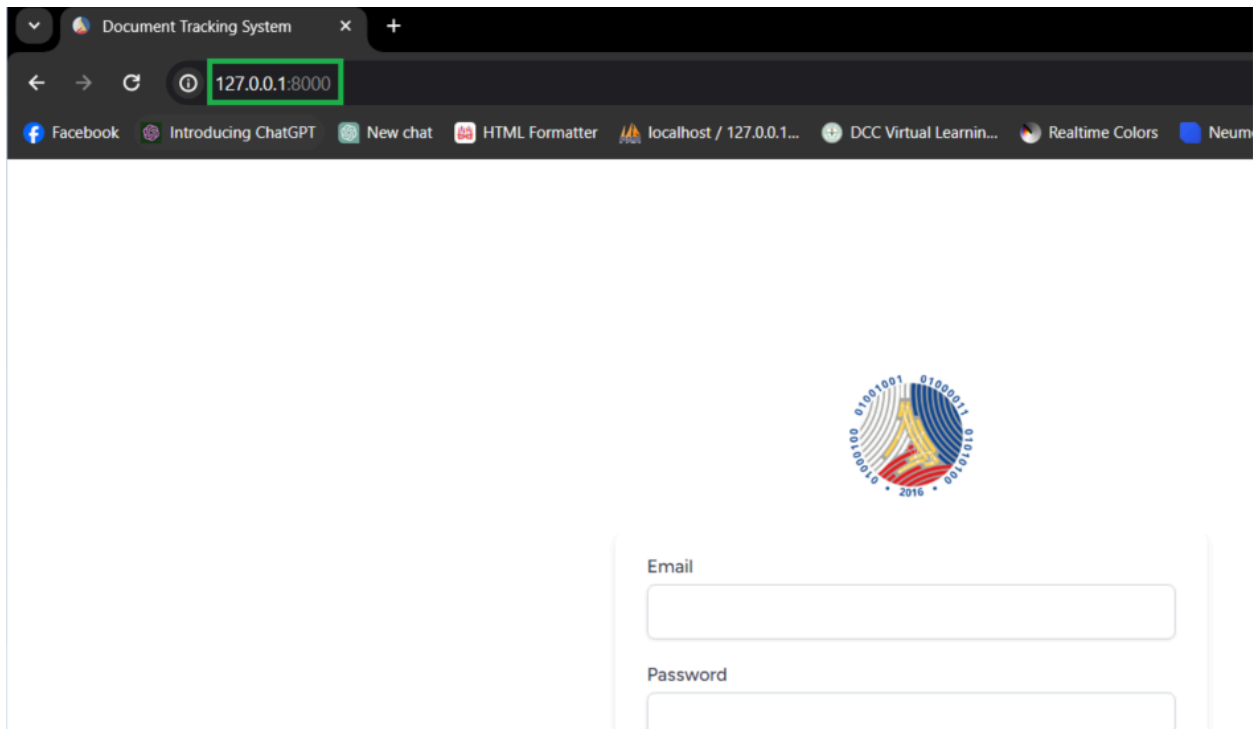
Designated recipients of documents sent by users. They are responsible for reviewing, approving, or taking actions on the documents they receive.

Responsibilities/ Functionalities:

- **Document Reception**
- **Document Processing**
- **Task Management**

DOCUMENT TRACKING SYSTEM

Accessing the System



To use the system, we need XAMPP to run it on our own computer. We can access it at '127.0.0.1:8000', which is the usual address for a local host

DOCUMENT TRACKING SYSTEM

Admin's Login



Email

admin@gmail.com

Password

.....|

☐ Remember me

[Forgot your password?](#)

LOG IN

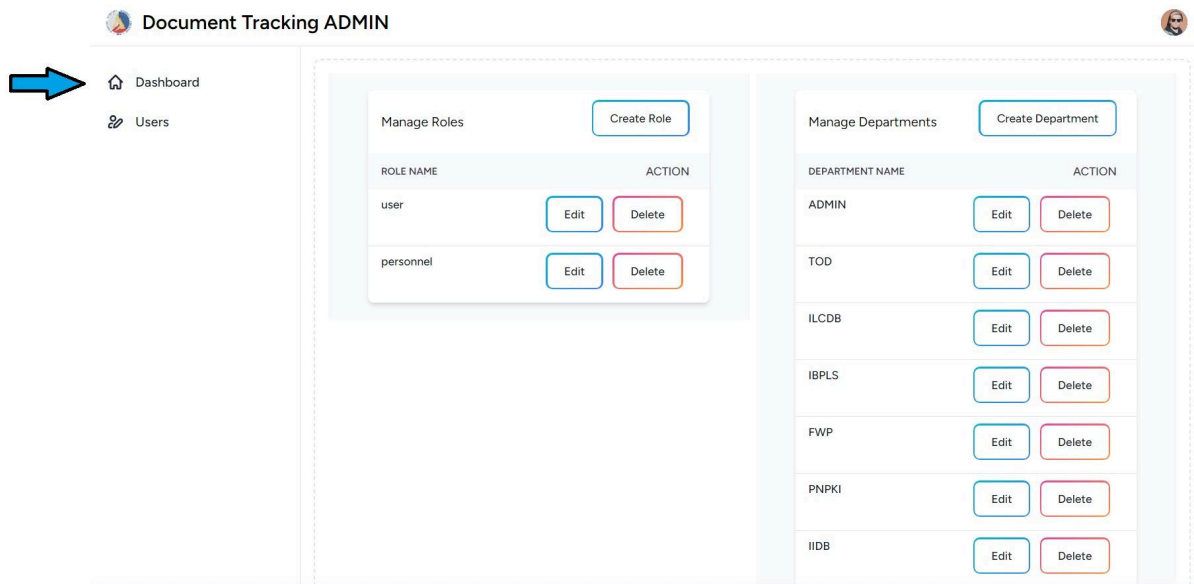
After entering the admin's
Email and Password.
Click Login



Only an admin can make a new user. Please ask your admin to make your account

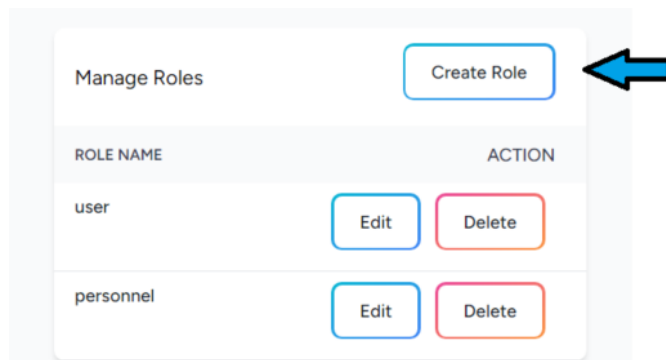
DOCUMENT TRACKING SYSTEM

Admin Dashboard

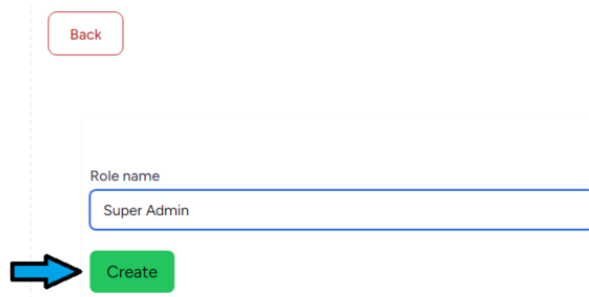


This is the admin dashboard. It shows 'Manage Roles' and 'Manage Departments'. You can create, read, update, and delete roles and departments.

Creating Role



To make a new user role, click the 'Create Role' button and type the role name you want.



DOCUMENT TRACKING SYSTEM

Creating Departments

Manage Departments

Create Department

DEPARTMENT NAME	ACTION	
ADMIN	Edit	Delete
TOD	Edit	Delete
ILCDB	Edit	Delete

Department Index

Department name


CASHIER


Create

To make a new department, click the ‘Create Department’ button and type the department name you want.

DOCUMENT TRACKING SYSTEM

Creating Users

 Document Tracking ADMIN

[Dashboard](#)
 [Users](#)

Manage Role

ROLE NAME

user

personnel

Create User

Search for users

NAME	POSITION	DEPARTMENT	ACTION
admin admin@gmail.com	admin user personnel	No Department Assigned	Edit Delete

[Back](#)

Name

Jeffer Arnado

Email

jeparnado@gmail.com

Password

.....

Create User

To create a new user, visit the user page. Click on the 'Create User' button. This will lead you to the 'Create User' page. Complete the user form. The users that have been created will be displayed in the users table.

DOCUMENT TRACKING SYSTEM

Assigning Roles and Department

Create User

Search for users

NAME	POSITION	DEPARTMENT	ACTION
admin admin@gmail.com	<div>adminuserpersonnel</div>	No Department Assigned	<div>EditDelete</div>
Jeffer Arnado jeparnado@gmail.com		No Department Assigned	<div>➡EditDelete</div>

Roles

Roles

personnel

Assign

Roles

personnel

Simply click the red button to delete the role

Roles

admin

Assign

Department

Department

ADMIN

Assign

Remove Department

DOCUMENT TRACKING SYSTEM

Department

ADMIN

Department

Select a department

Assign

Remove Department

Simply click the red button to remove assigned department

To add roles and a department to a new user, click the 'Edit' button. This will take you to the 'Edit User' page. Here, you can change the user's information. To add a role to the user, click the 'Roles' dropdown. This will show the roles that you can give to the user. To add a department to a user, scroll down to the 'Department' dropdown. Choose the department you want for the user. The user's roles and department will be shown in the users table

DOCUMENT TRACKING SYSTEM

User's Dashboard

The screenshot displays the 'Document Tracking' dashboard. On the left, a navigation menu includes 'Dashboard' and 'Document Tracking', with a blue arrow pointing to the latter. The main content area features a 'CREATE DOCUMENTS' button at the top, also indicated by a blue arrow. Below this is a table titled 'DOCUMENT TRACKING' with the following columns: Department, Personnel, Uploaded Documents, Created Date, Accept Date, Reuploaded Documents, Released Date, Remarks, and Actions. A modal form titled 'Create Documents' is open, showing dropdown menus for 'Department' (set to 'ADMIN') and 'Assigned Personnel' (set to 'Jeffer Arnado'). It includes a file upload section with a 'Choose File' button and the filename 'FORESTLAKE-MARKETING.docx', followed by 'Add Another Document', 'Submit', and 'Close' buttons. A blue arrow points to the 'Submit' button.

Department	Personnel	Uploaded Documents	Created Date	Accept Date	Reuploaded Documents	Released Date	Remarks	Actions
------------	-----------	--------------------	--------------	-------------	----------------------	---------------	---------	---------

Create Documents

Department: ADMIN

Assigned Personnel: Jeffer Arnado

Upload Document: Choose File FORESTLAKE-MARKETING.docx

Add Another Document

Submit

Close

To send a document to someone, go to the 'Document Tracking' page. Click the 'Create' button to show the 'Create Document' form. Select the department and the person you want to send the document to. Then, upload the document and click 'Submit'. The details about the department, the person you sent the document to, the date you sent the document, the date the person accepted the document, the re uploaded documents that can be downloaded, the date the reuploaded document was uploaded, whether it's done or pending, and actions to edit the document will be shown.

DOCUMENT TRACKING SYSTEM

CREATE DOCUMENTS

DOCUMENT TRACKING

Department	Personnel	Uploaded Documents	Created Date	Accept Date	Reuploaded Documents	Released Date	Remarks	Actions
ADMIN	Jeffer Arnado	FORESTLAKE-MARKETING.docx	2024-05-08 11:56:03	Not Accepted Yet	No Reuploaded File	Not Released Yet	Pending	Edit

After accepting the documents by the personnel, the user can easily track if the document was accepted and re-uploaded already.

Document Tracking

Dashboard

Document Tracking

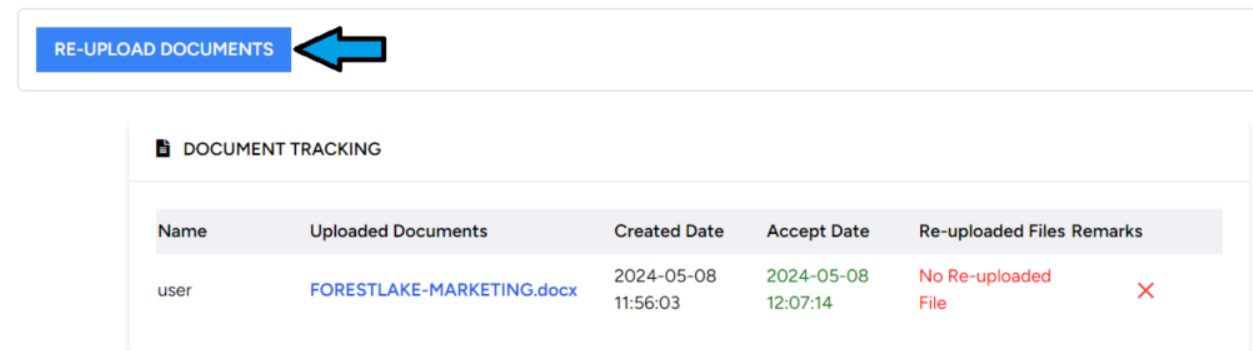
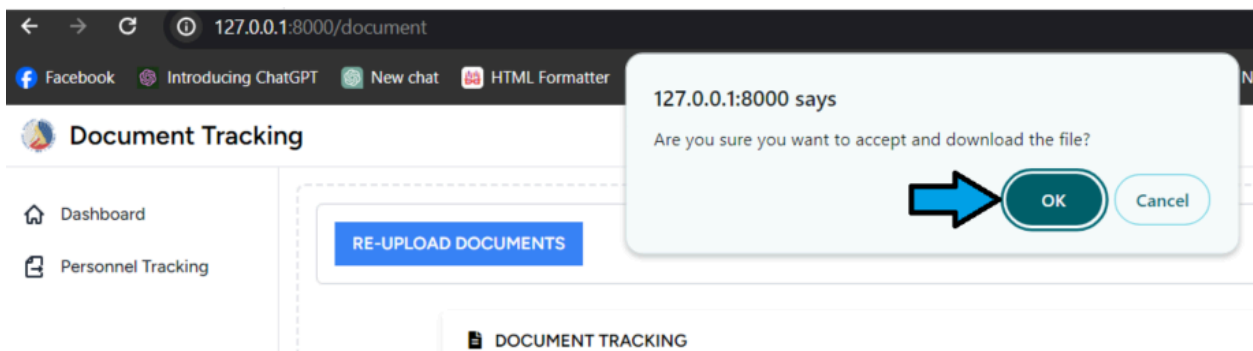
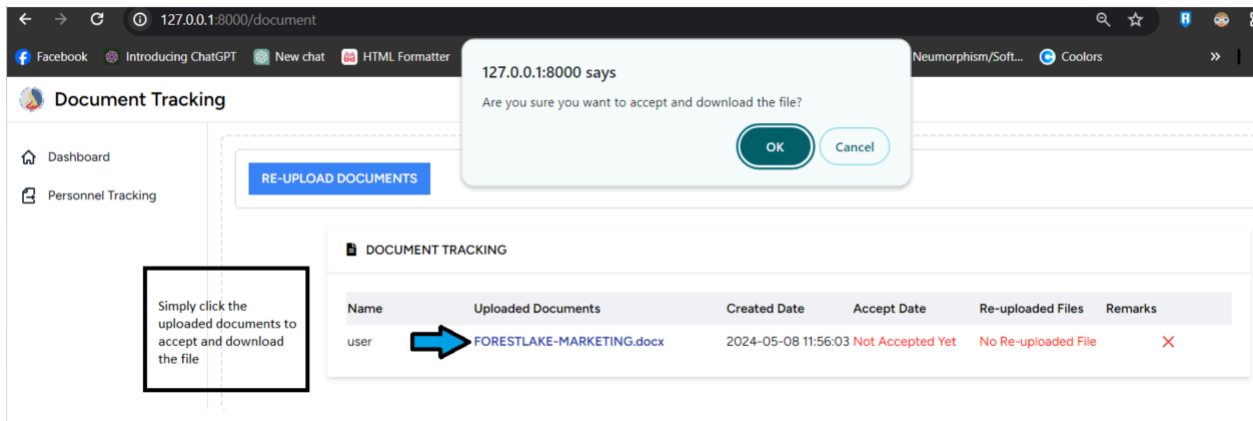
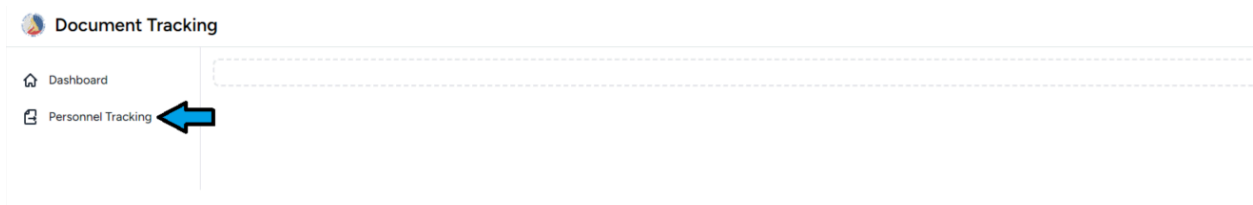
CREATE DOCUMENTS

DOCUMENT TRACKING

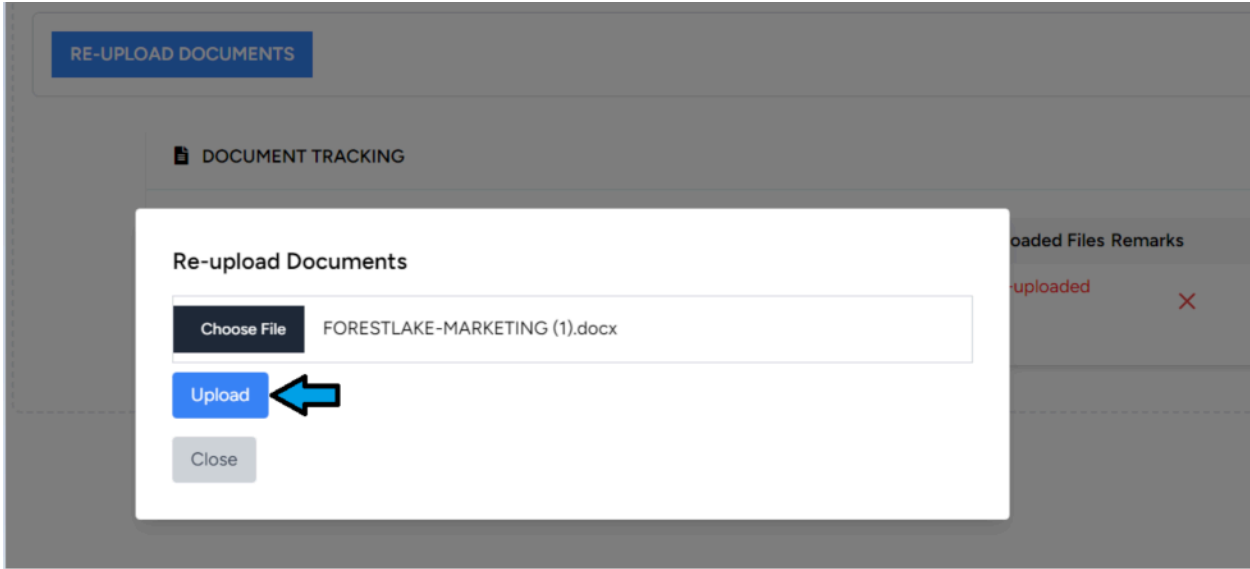
Department	Personnel	Uploaded Documents	Created Date	Accept Date	Reuploaded Documents	Released Date	Remarks	Actions
ADMIN	Jeffer Arnado	FORESTLAKE-MARKETING.docx	2024-05-08 11:56:03	2024-05-08 12:07:14	1715170167_FORESTLAKE-MARKETING (1).docx	2024-05-08 12:09:27	Done	Edit

DOCUMENT TRACKING SYSTEM

Personnel's Dashboard



DOCUMENT TRACKING SYSTEM



RE-UPLOAD DOCUMENTS

DOCUMENT TRACKING

Name	Uploaded Documents	Created Date	Accept Date	Re-uploaded Files Remarks
user	FORESTLAKE-MARKETING.docx	2024-05-08 11:56:03	2024-05-08 12:07:14	1715170167_FORESTLAKE-MARKETING (1).docx ✓

Personnels can see the files users sent in the document tracking table. To reupload documents, click the 'Reupload Document' button. This will show the 'Reupload Document' form. Upload the updated document and click the 'Upload' button. This will update the 'Accept Date' and 'Remarks'