DICT XI

Documentation Tracking System

User Manual

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**

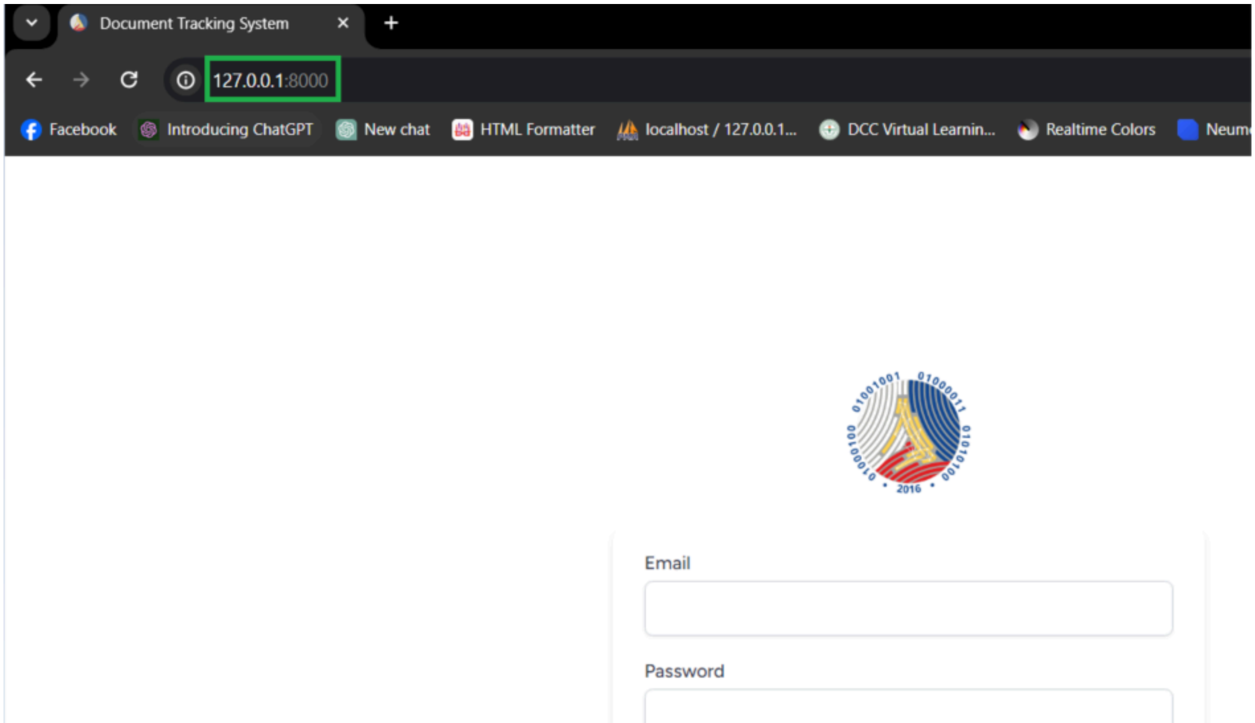
Personnels

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

Responsibilities/ Functionalities:

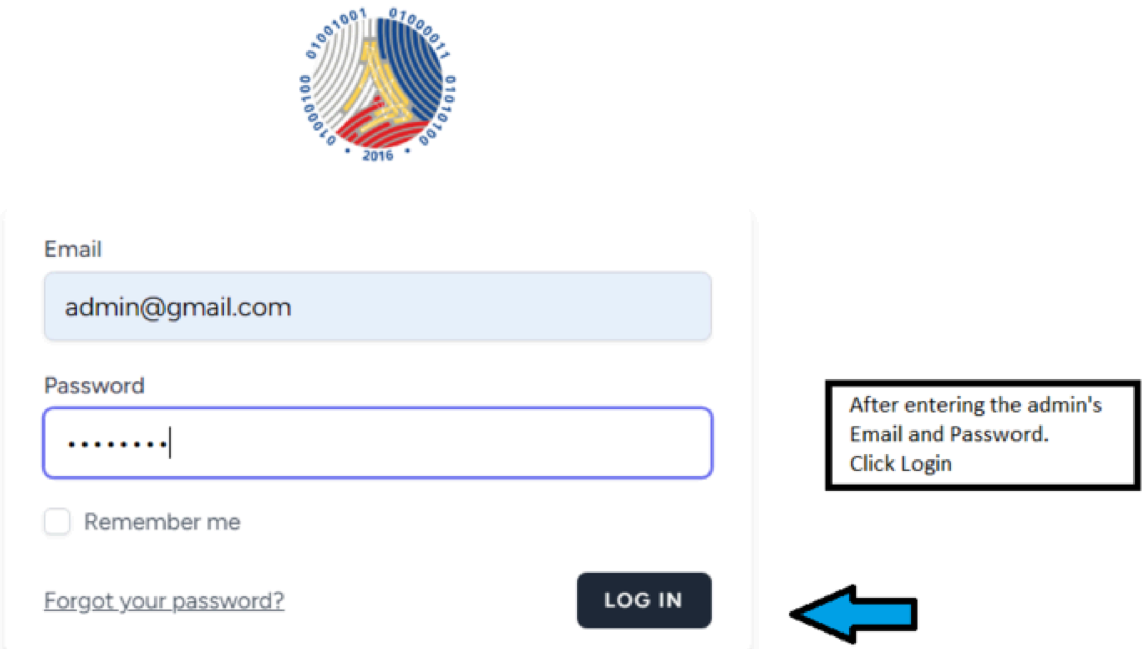
- **Document Reception**
- **Document Processing**
- **Task Management**

Accessing the System



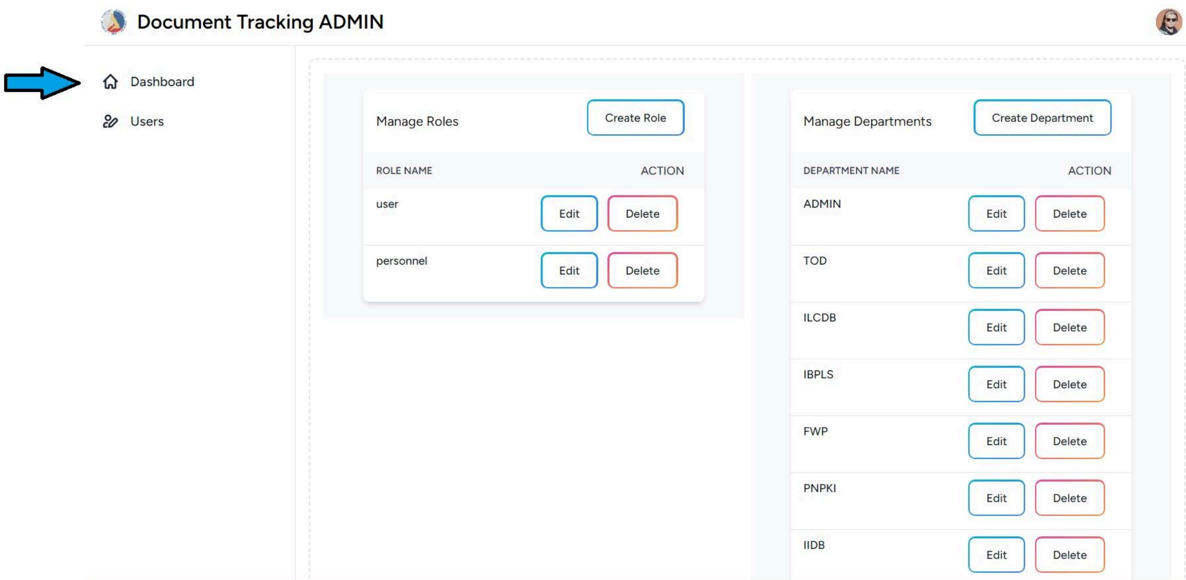
To use the system, we need XAMPP to run it on our own computer. We can access it at ‘127.0.0.1:8000’, which is the usual address for a local host

Admin's Login



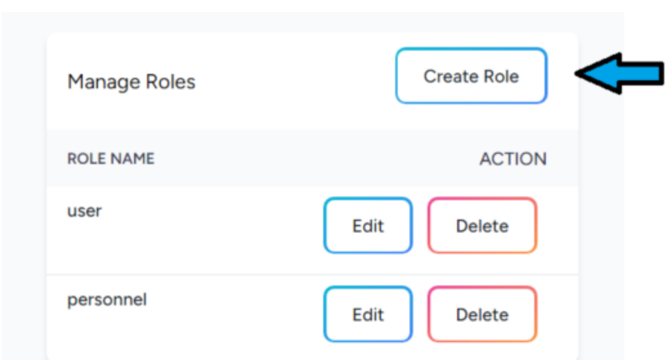
Only an admin can make a new user. Please ask your admin to make your account

Admin Dashboard

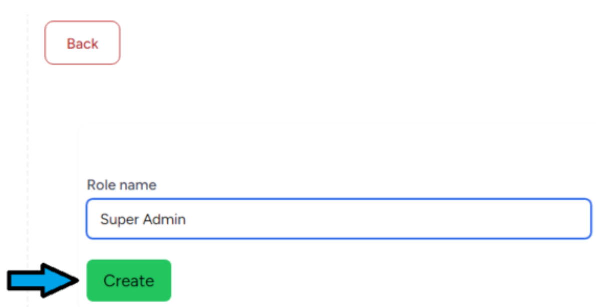


This is the admin dashboard. It shows 'Manage Roles' and 'Manage Departments'. You can create, read, update, and delete roles and departments.

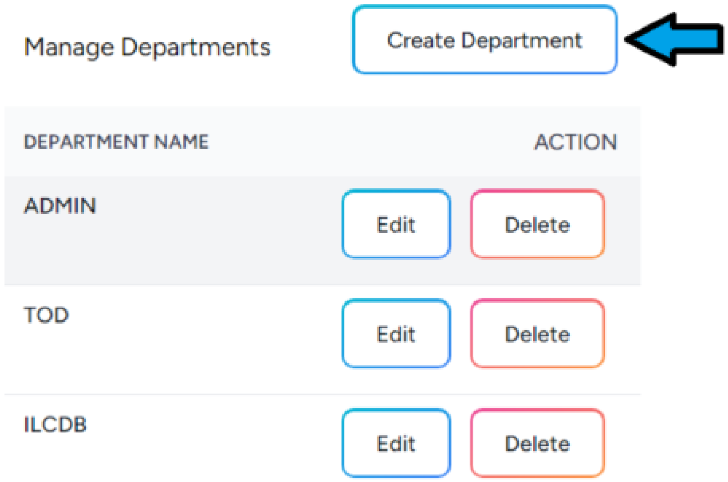
Creating Role

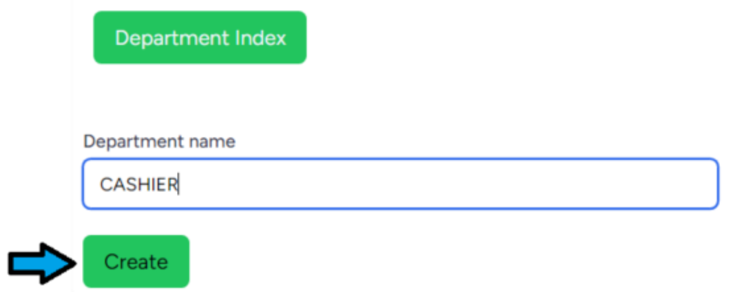


To make a new user role, click the 'Create Role' button and type the role name you want.



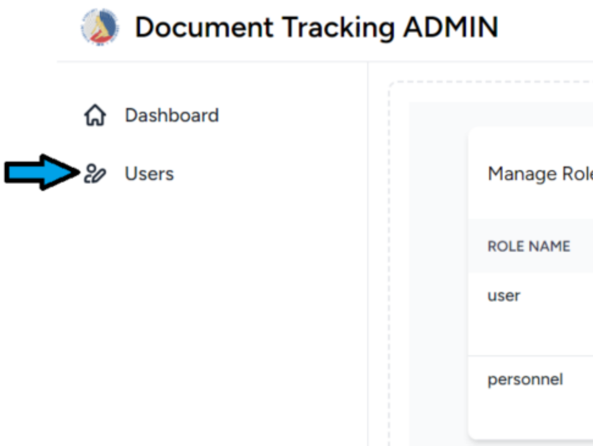
Creating Departments

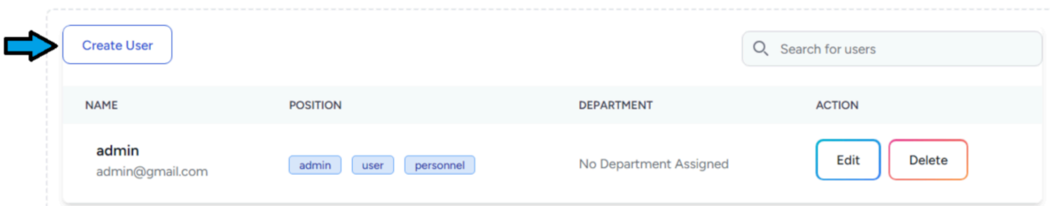




To make a new department, click the ‘Create Department’ button and type the department name you want.

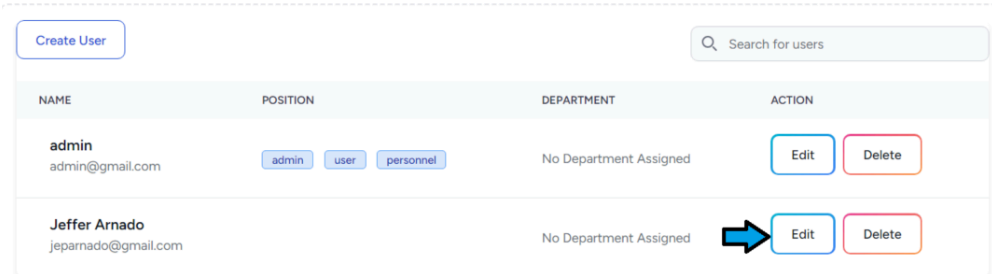
Creating Users

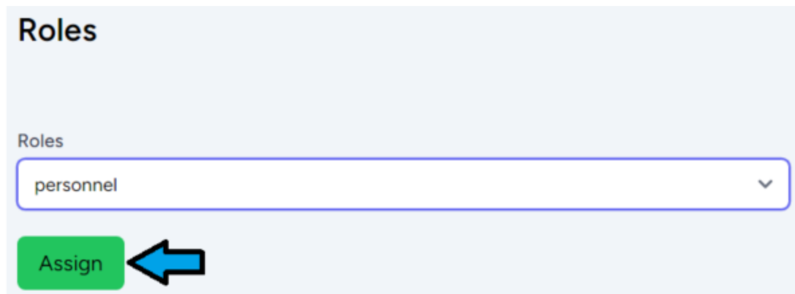


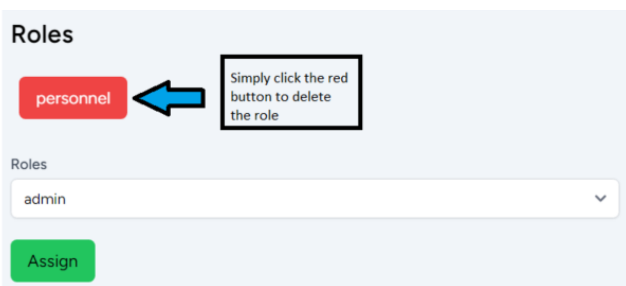


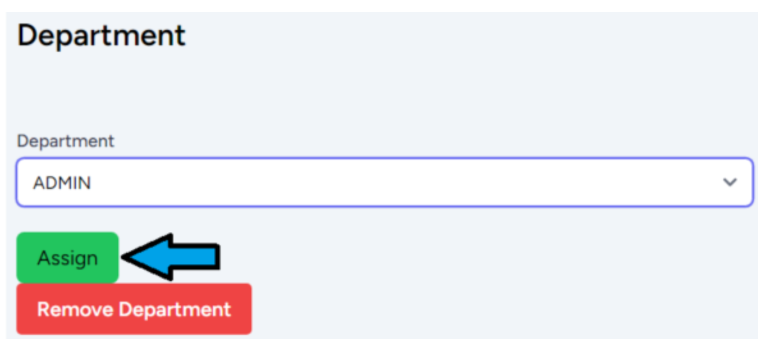
To create a new user, visit the user page. Click on the ‘Create User’ button. This will lead you to the ‘Create User’ page. Complete the user form. The users that have been created will be displayed in the users table.

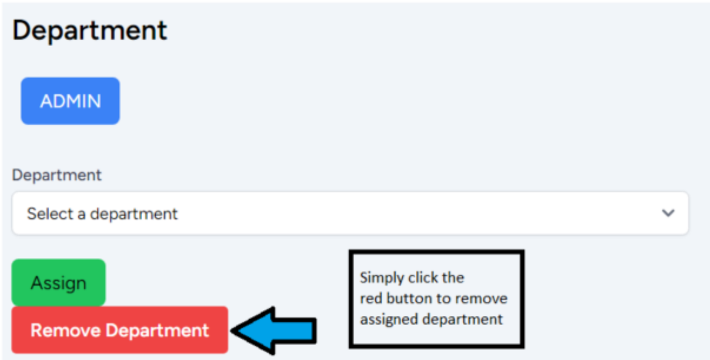
Assigning Roles and Department





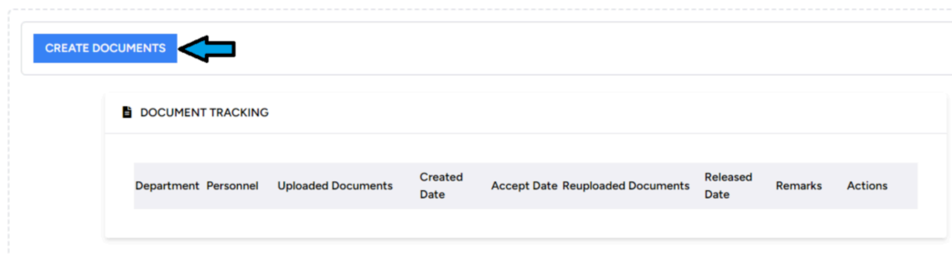


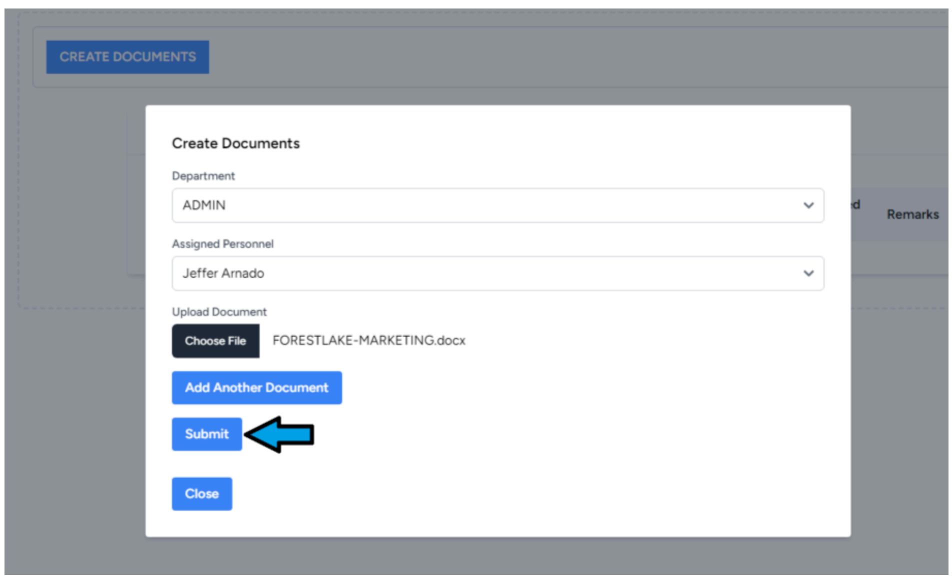




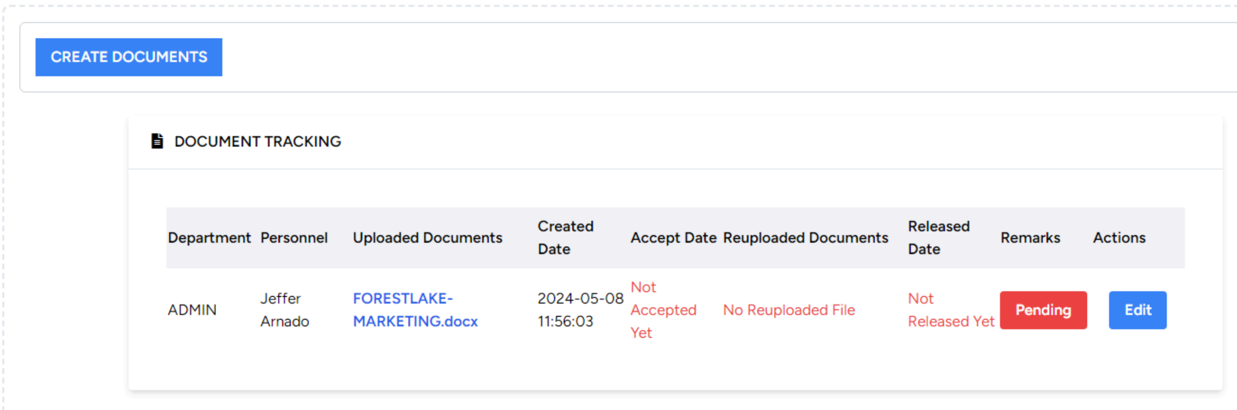
To add roles and a department to a new user, click the ‘Edit’ button. This will take you to the ‘Edit User’ page. Here, you can change the user’s information. To add a role to the user, click the ‘Roles’ dropdown. This will show the roles that you can give to the user. To add a department to a user, 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

User's Dashboard

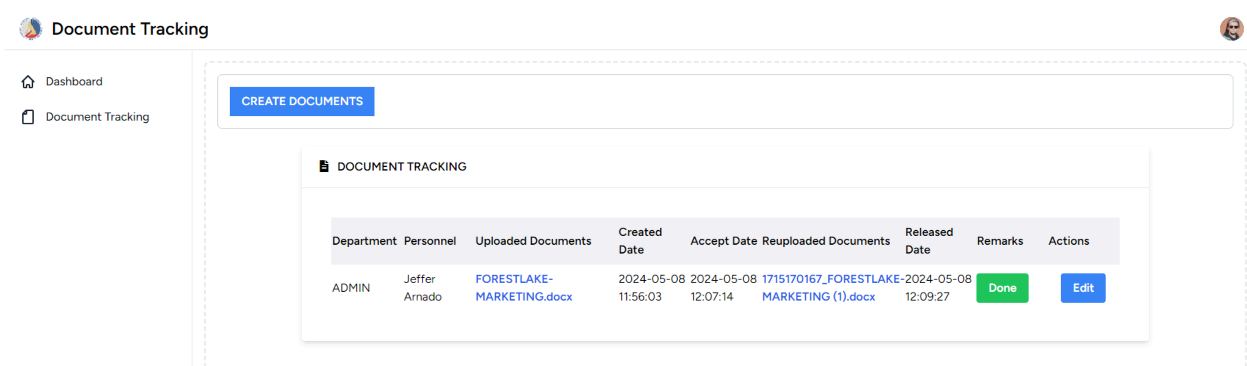




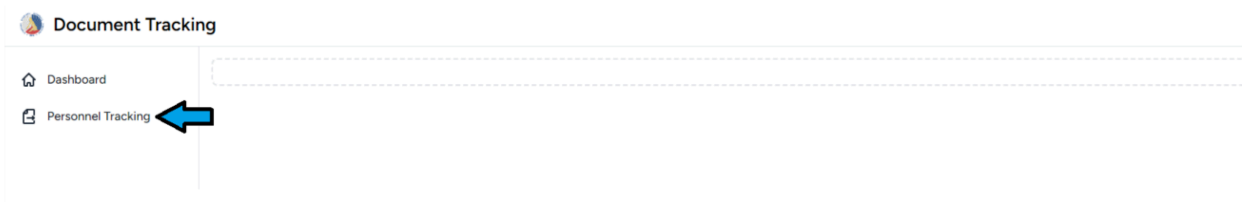
To send a document to someone, go to the 'Document Tracking' page. Click the 'Create' button to show the 'Create Document' form. Select the department and the person you want to send the document to. Then, upload the document and click 'Submit'. The details about the department, the person you sent the 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.

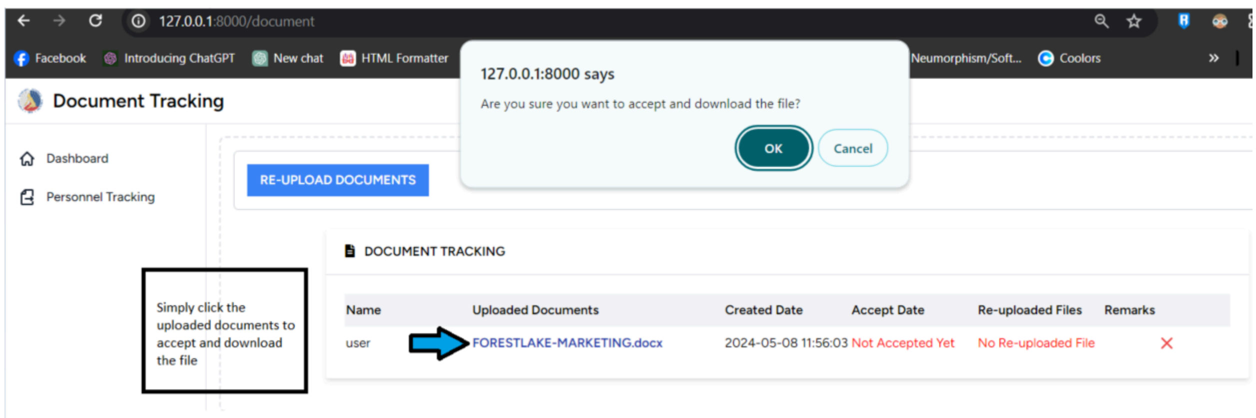


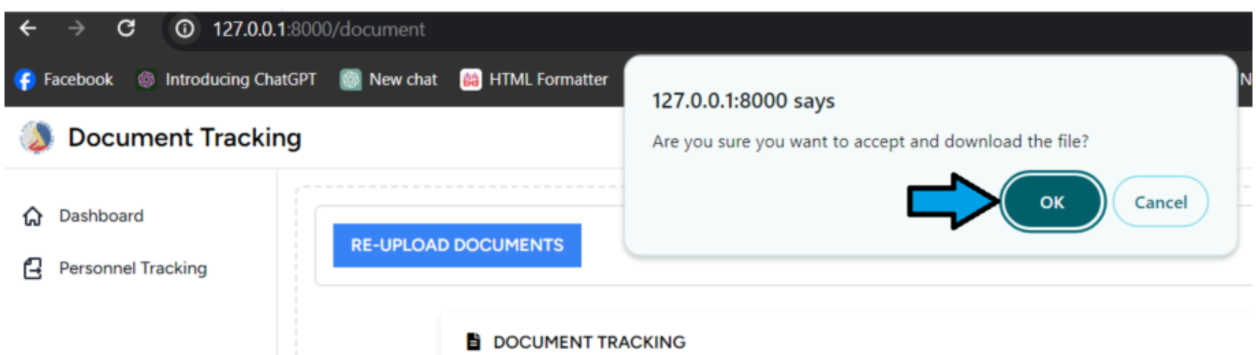
After accepting the documents by the personnel, the user can easily track if the document was accepted and re-uploaded already.

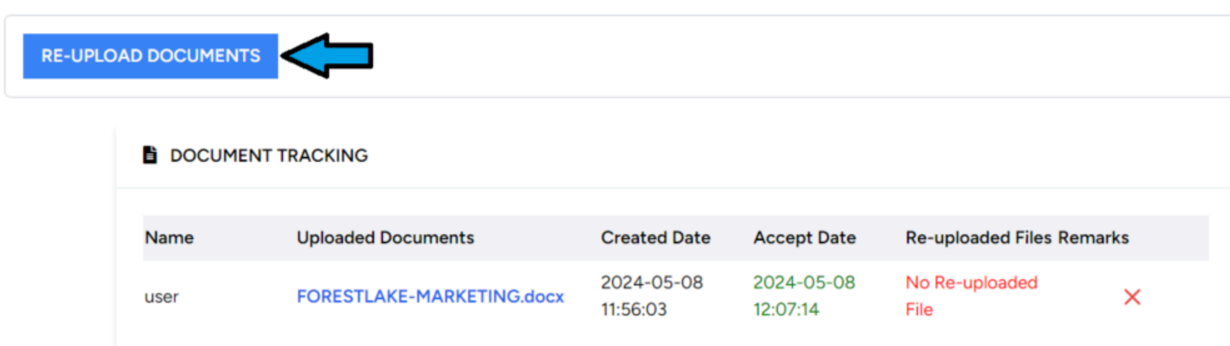


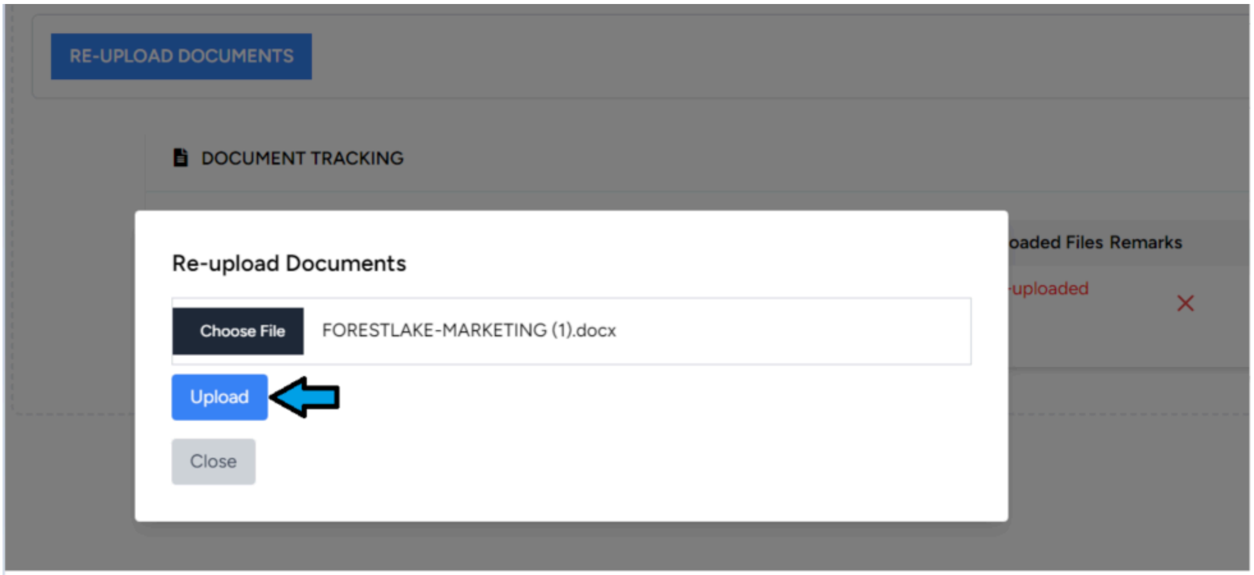
Personnel's Dashboard

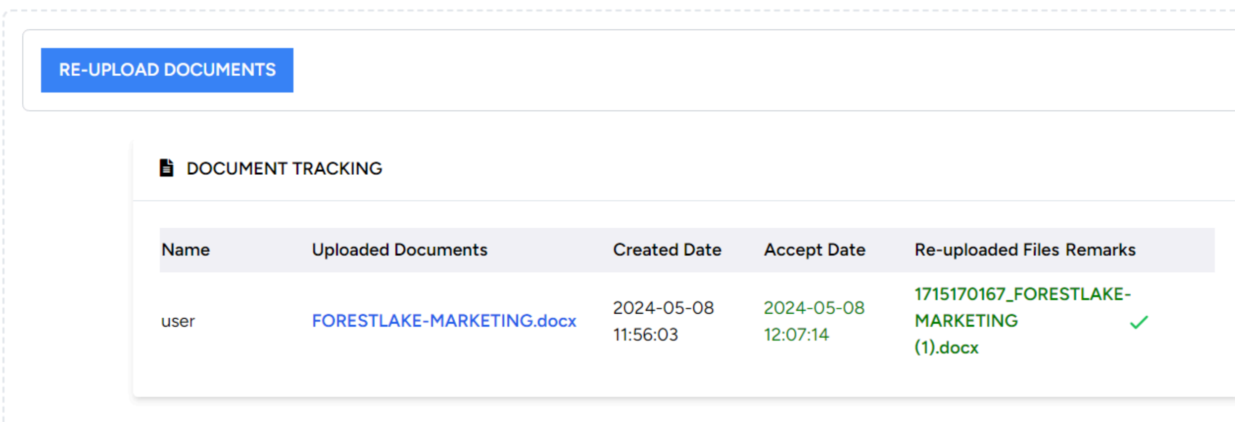












Personnels can see the files users sent in the document tracking table. To reupload documents, click the 'Reupload Document' button. This will show the 'Reupload Document' form. Upload the updated document and click the 'Upload' button. This will update the 'Accept Date' and 'Remarks'