DMS

By TheGoodGuys

DOCUMENT MANAGEMENT SYSTEM MANUAL

Introduction

About Document Management System

Document Management System (DMS) created by TheGoodGuys™ is designed to manage documents inside the company. DMS facilitates and expedites acceptance and rejection of documents and the collection of statistics. This program is user friendly, does not require a lot of system resources and is easily accessible via the Internet.

Installation guide

Prerequisites

You need to have installed all these programs to your Linux OS:

- Java 8+
- Node.js 8.10+
- Yarn 1.19.x
- Maven 3.6.x
- Tomcat 9.0.29
- H2 Database 1.4.200

Installing application

Create new folder and run following command:

```
git clone https://github.com/JustasMarkauskas/Document-Management-System.git
```

This will get a copy of the project installed locally. To install all of its dependencies and start each app, follow the instructions below. To run Spring Boot API, cd into the dms-app folder and run:

```
mvn clean install spring-boot:run -Dspring-boot.run.arguments=--server.port=8081
```

To run React UI, cd into the dms-ui folder and run:

```
1. yarn install
2. yarn start
```

Using application

- Browse to http://localhost:3000/ to see REACT UI
- Browse to http://localhost:8081/swagger-ui.html/ to use Swagger
- Browse to http://localhost:8081/console/ to connect to database. In JDBC URL field enter db path: jdbc:h2:~/home/dmsDB1.db. Username: sa. Password: (do not write anything)

Administrator guide

Log in as administrator

If you want to log in as system administrator for the first time use username and password provided by system developers (TheGoodGuys). First page that you see will be users administration page. **After first log in it is strongly recommended to change your admin password to a new one, for security reasons.**
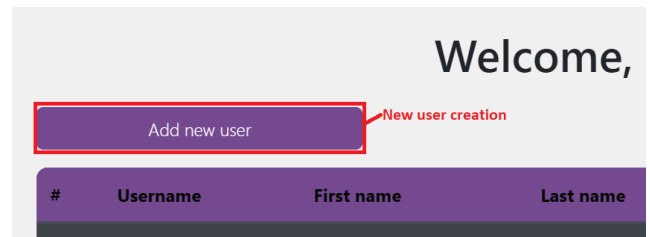
User administration page

Accessing Users administrating page

To access Users administrating page press "Users" button in navigation bar.

Creating new user

If you want to create user press "Add new user button". You have to fill all input fields with user information except comment field that is optional. After filling all required info press "Submit" and new created user will be enrolled in to a data base.

Editing created user

You can edit created user information by clicking on user action button in user administration page. In user information page you can edit existing user "First name", "Last name" and "Comment" fields information, and change selected user password.

Assigning user to group

User can be assigned to a group by clicking user action button and then pressing on "Assign" button in group field and then selecting wanted groups for user. **It is strongly recommended to assign user to a group in user information page.**
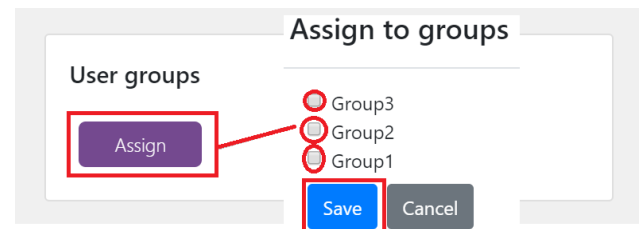
Document Types administration page

Accessing Document Types administrating page

To access Document Types administrating page press "Document types" button in navigation bar.

Creating new document type

To create new document type press "Add new document type", fill all fields that are required and press "Submit" button.

Editing document types

To edit document type press action button and edit comment field information.

Groups administration page

Accessing Document Types administrating page

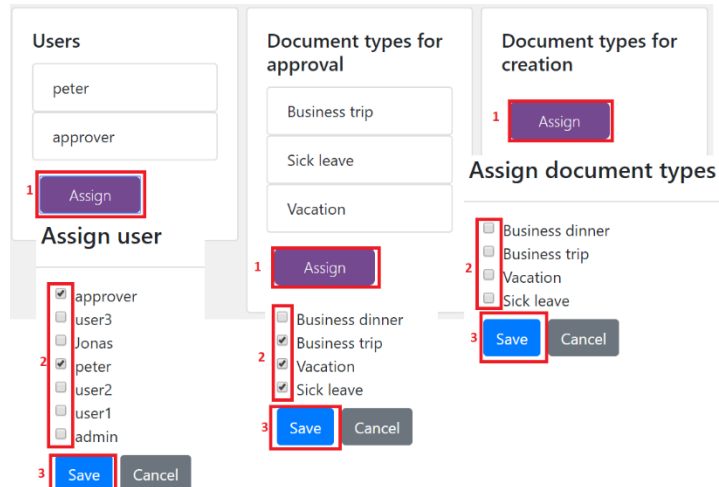To access Groups administrating page press "Groups" button in navigation bar.

Groups

New group creation

To create new group press "Add new group" button, fill all fields that are required and press "Submit" button.

Managing existing group

To edit information about group, assign users or document types press action button [⚙] in a new window you can edit "Comment" field information. In "User" field you can assign a user for a group by pressing "Assign" button, in "Document types for approval" field you can assign document types that your selected group can approve or reject by pressing "Assign" button and selecting wanted document types, and in "Document types for creation" field you can select document types that your group can create and submit.

User guide

Log in as User

To log in as User use log in name and password provided by system administrator, first page that you will see will be Documents page. **It is strongly recommended to change your password after first Log In, in user profile page.**

User Document page

Accessing user Document administrating page

To access Groups administrating page press "Documents" button in navigation bar.

Documents

Adding new documents

To add new document press "Add new document" button and fill all required fields. If no file will be attached to document, there will be possible only to save created document for later submission. You will be able see your documents status in you document list. For submitting saved document press action button [⚙] add required file and press "Submit" button.

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Reviewing submitted documents

To review submitted document press action button [icon] to see all document information, it's status, document reviewer information, unique ID.

Documents sorting

To sort user document use sorting bar where you can sort documents by status.

Documents for approval page

If you are an authorized person to approve or reject submitted documents you can reach document for approval page by pressing "Document for approval" button in navigation bar on the left side of a screen.

Approving/Rejecting documents

To review submitted document press on action button [icon] to see all information about request, and then press "Approve" or "Reject" button for your decision. **If you rejecting document "Comment" field is required.**

Statistics

To documents statistic press "Statistics" button [Statistics] and then select document type whose statistic you want to see.
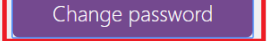
Profile page

Accessing Profile information page

To see your profile information press "Profile" button in navigation bar. [Profile]

Change password

Press "Change password" button in profile information page [Change password] and then fill required fields and press "Change" button to save your new password.