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## Chapter 1: Document Management System (DMS)

The Document Management System (DMS) is a comprehensive solution designed for corporate entities to efficiently manage and control their documents and records across various companies under their umbrella. This system integrates seamlessly with the existing Corporate Information System (CIS), enhancing its capabilities by adding robust document version control, secure file storage, and user access management.

The DMS allows for the streamlined upload, organization, and retrieval of documents, ensuring that every version of a document is tracked and accessible, thereby facilitating better compliance and audit trails. By centralizing document management, the DMS helps companies maintain accurate records, manage sensitive information securely, and provide controlled access to essential corporate documents. This ensures that all critical documentation is easily accessible and properly managed, supporting the efficient operation and oversight of multiple business entities.

### **Special Features**

DMS comes loaded with special features that will impact positively on your efficiency as a company secretary. Among them are:-

- **User Management** features

DMS includes a robust User Management module that enables administrators to create, modify, and manage user accounts with different access levels. Role-based permissions ensure that only authorized personnel can access, edit, or delete sensitive corporate documents.

- **Document Management** features

The system allows for efficient storage, categorization, and organization of corporate records such as board resolutions, meeting minutes, and statutory documents. Users can upload, classify, and manage documents based on categories, ensuring a well-structured repository.

- **Search and Retrieval** features

With an advanced search and retrieval system, users can quickly locate documents using keywords, metadata, or filters such as document type, and company. This significantly reduces time spent on manual searches and improves operational efficiency.

- **Reporting** features

DMS provides comprehensive reporting tools that generate insights on document access, modifications, and login status. This Report help company secretaries track document versions, and overall document activity.

- **Email Notification** features

The system integrates with an email notification feature, ensuring users receive timely alerts on key actions such as email verification and reset password. This helps in maintaining smooth workflows and avoiding delays in regulatory submissions.

- **Generate Summary using AI** features

A standout feature of DMS is its ability to generate document summaries using AI. This feature allows users to quickly understand lengthy documents by providing concise and relevant summaries, saving time when reviewing multiple documents.

- **Version Control** features

DMS ensures proper version control, allowing users to track changes made to a document over time. Each modification is recorded, and previous versions can be accessed if needed. This feature is crucial for maintaining audit trails and ensuring compliance with regulatory requirements.

- **Character Recognition (OCR)** features

The Optical Character Recognition (OCR) feature extracts text from images and scanned documents, automatically storing the extracted content in the database. This enables users to search for and retrieve images based on their textual content, making it easier to locate visual documents linked to specific keywords or information.

## 1.1. An Overview

This overview will guide you through each main module of DMS. It also includes a brief guide to navigating DMS, with descriptions of the menus, and function buttons.

There are several main modules in DMS. Namely:-

- User Management Module
- Reset Password Module
- Document Management Module
- Search and Retrieval Module
- Version Control Module
- Reporting Module

### 1.1.1. User Management Module

The User Management Module is a core component of the Document Management System (DMS), allowing authorized administrators to manage user access and company information efficiently. This module is exclusively accessible to **Super Admins** and **Company Admins**, ensuring secure and controlled management of user accounts and company details.

Within this module, there are two main sections:

- **Company List** – Allows administrators to view, add, update, and manage company details within the system.
- **User List** – Enables the creation, modification, activation, and deactivation of user accounts associated with each company.

Through the User Management Module, administrators can assign roles, regulate permissions, and ensure secure access to the system, maintaining a well-structured and organized user environment.

#### 1.1.1.1. Company List

The Company List section allows administrators to manage company-related information within the DMS. This feature is essential for structuring document access and ensuring that users are associated with the correct company.

**Key Functions:**

- **View Companies** – Display a list of registered companies within the system.
- **Add New Company** – Register a new company by entering relevant details such as company name, address, and contact information.
- **Edit Company Details** – Modify company information when necessary.
- **Delete Company** – Disable a company to restrict access for its users.

Only **Super Admins** have full control over company management, while **Company Admins** can manage their own company's details.

#### **1.1.1.2. User List**

The User List section allows administrators to manage user accounts and their access within the system. Each user is linked to a specific company, and their permissions are assigned based on predefined roles.

**Key Functions:**

- **View Users** – Display a list of all users under a specific company.
- **Add New User** – Create a new user account by providing details such as name, email, role, and assigned company.
- **Edit User Information** – Update user details, including role changes and contact information.
- **Deactivate User** – Disable a user's access to the system.

**Super Admins** have full access to managing all users across different companies, while **Company Admins** can only manage users within their respective company.

#### **1.1.2. Reset Password Module**

The Reset Password Module allows users to securely recover access to their accounts in case they forget their passwords. This module ensures that only authorized users can reset their passwords through a secure and controlled process.

**Key Functions:**

- **Forgot Password Request** – Users who forget their passwords can initiate a reset request from the login page by entering their registered email address.

- **Email Verification** – A password reset link is sent to the user's email for verification.
- **Secure Password Update** – Once verified, users can set a new password following the system's password security requirements.

This module enhances security by preventing unauthorized access while ensuring a smooth recovery process for users.

### 1.1.3. Document Management Module

The Document Management Module is the core of the DMS, enabling users to securely store, organize, and manage documents efficiently. This module ensures structured document handling, version control, and access control based on user roles and permissions.

#### Key Functions:

- **Upload Documents** – Users can upload files in various formats (PDF, Word, Excel, etc.) and categorize them for easy retrieval.
- **Organize Documents** – Documents can be assigned to specific folders, categories, or tags for structured storage.
- **Access Control** – Permissions are managed to restrict document access based on user roles (Super Admin, Company Admin, Contributor, Viewer).
- **Edit and Update Documents** – Users with the necessary permissions can modify or replace existing documents.
- **Delete** – Documents can be removed.
- **Audit Trail & Activity Logs** – Tracks document interactions, including uploads, edits, and access history, for accountability and compliance.

This module ensures that documents are stored securely, easily accessible, and properly managed throughout their lifecycle.

### 1.1.4. Search and Retrieval Module

The Search and Retrieval Module allows users to quickly locate and access documents within the DMS using powerful search functionalities. This module ensures efficient document retrieval, saving time and enhancing productivity.

#### Key Functions:

- **Keyword-Based Search** – Users can search for documents by entering relevant keywords, such as document title, content, tags, or metadata.
- **Advanced Search Filters** – Filter results based on document type, and organizations.

This module enhances document accessibility and efficiency, ensuring users can find the right documents with minimal effort.

#### 1.1.5. Version Control Module

The Version Control Module ensures proper tracking and management of document revisions, allowing users to maintain an organized history of changes. This module prevents data loss, supports collaboration, and ensures compliance by keeping records of all modifications made to a document

##### Key Functions:

- **Track Changes** – Maintains a history of modifications, including who made changes and when.
- **Restore Previous Versions** – Allows users to revert to an earlier version of a document if needed.

#### 1.1.6. Reporting Module

The Reporting Module provides administrators with insights into system activities, document usage, and user interactions within the DMS. This module helps in monitoring system performance, ensuring compliance, and improving document management efficiency.

##### Key Functions:

- **User Activity Reports** – Track user logins, document uploads, edits, deletions, and access history.
- **Audit Logs** – Maintain a detailed record of all actions performed within the system for security and compliance purposes.



## Chapter 2: Collaborating In DMS

Designed as a multi-user client-server application, DMS is the central of collaboration between all the information worker in the organization

### 2.1. User Access Matrix

<b>Roles / Modules</b>	<b>User Management</b>	<b>Organizing and Categorizing Documents</b>	<b>Document Uploading and Management</b>	<b>Search and Retrieval</b>	<b>Compliance and Audit Trails</b>
<b>Super Admin</b>	Full Access	Full Access	Full Access	Full Access	Full Access
<b>Company Admin</b>	Full Access (Only Related to the Company)	Full Access (Only Related to the Company)	Full Access (Only Related to the Company)	Full Access	Full Access (Only Related to the Company)
<b>Company Contributor</b>	No Access	Full Access (Only Related to the Company)	Full Access (Only Related to the Company)	Full Access	Full Access (Only Related to the Company)
<b>Viewer</b>	No Access	No Access	View Only	Full Access	View Only

#### 2.1.1. Super Admin

The Super Admin has the highest level of control within the DMS. This role is responsible for system-wide management, including user administration, document handling, and compliance monitoring.

### **2.1.2. Company Admin**

The Company Admin oversees document management and user administration within their assigned company. They have full control over their company's data but cannot manage other companies within the system.

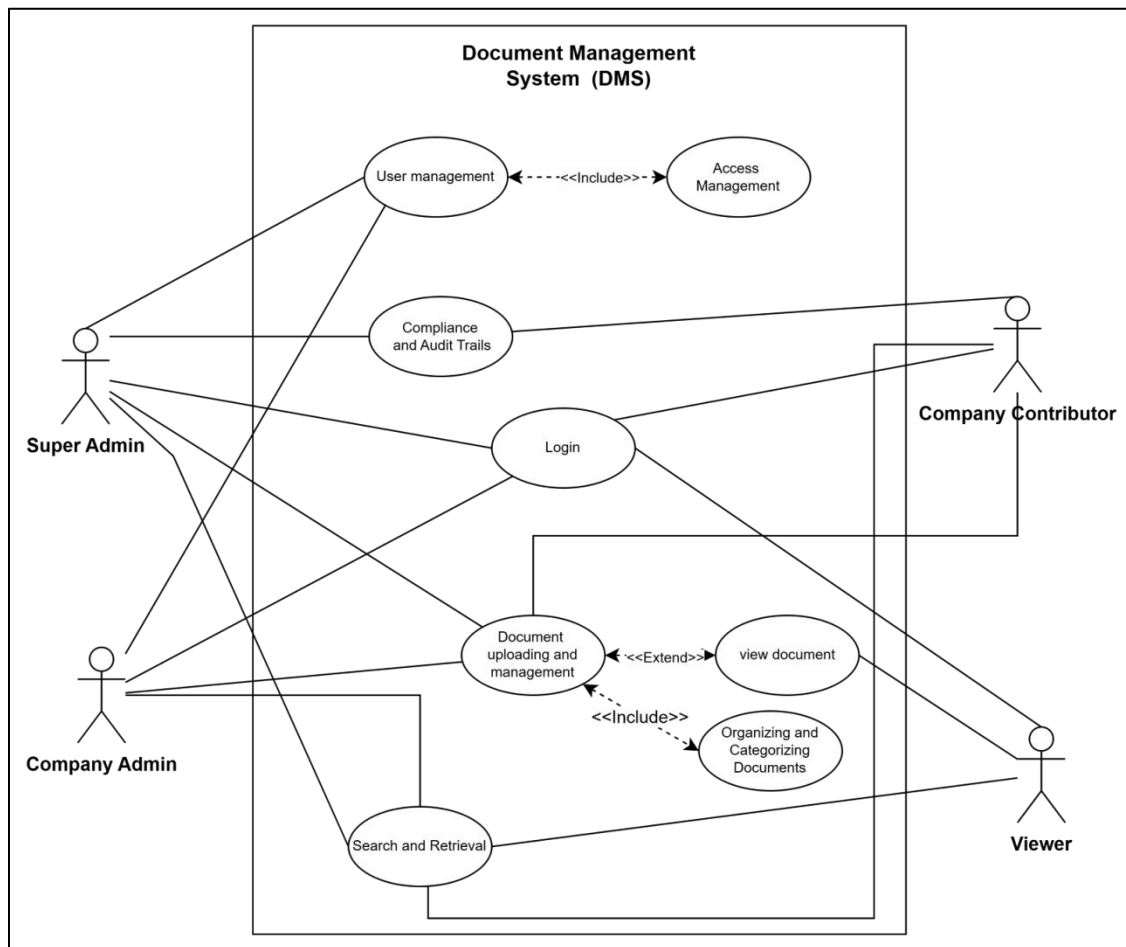
### **2.1.3. Company Contributor**

The Company Contributor is responsible for managing and organizing documents within their company. They do not have user management privileges but can fully interact with documents and compliance-related records.

### **2.1.4. Viewer**

The Viewer role is designed for users who need read-only access to documents and compliance logs. They cannot modify or upload documents but can search and retrieve information as needed.

## 2.2. Use Case of DMS



### Workflow:

#### i. User Management:

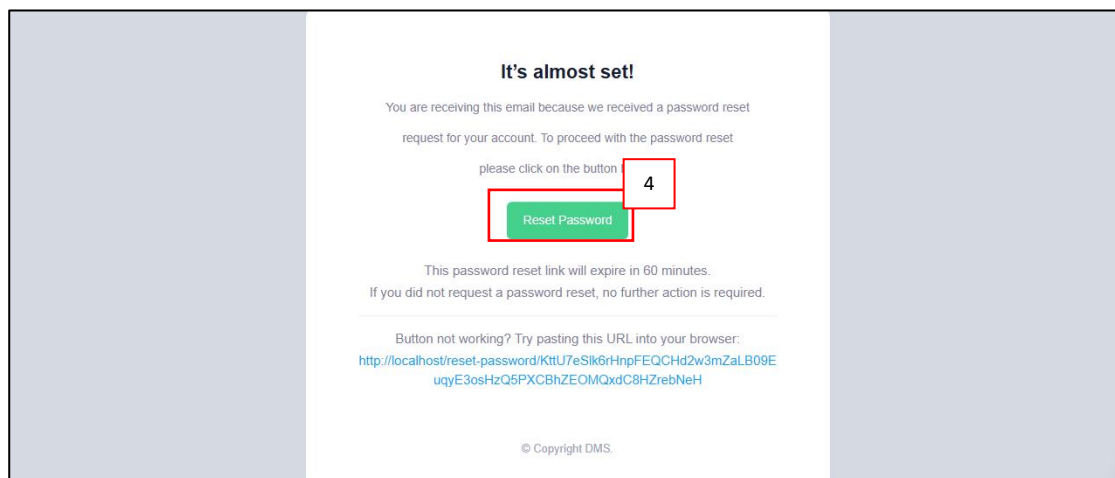
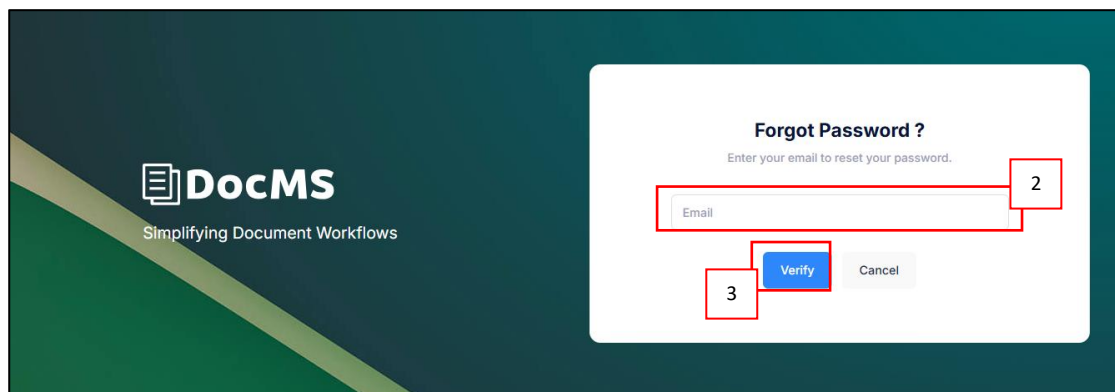
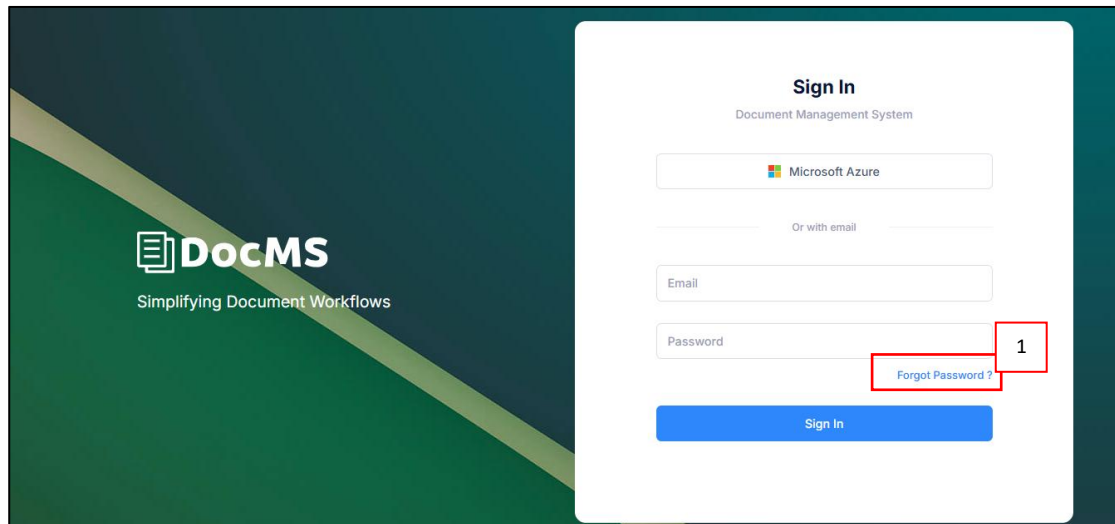
- A user logs into the DMS using their credentials
- Administrators or authorized users can manage user accounts (e.g., create, modify, or disable users).

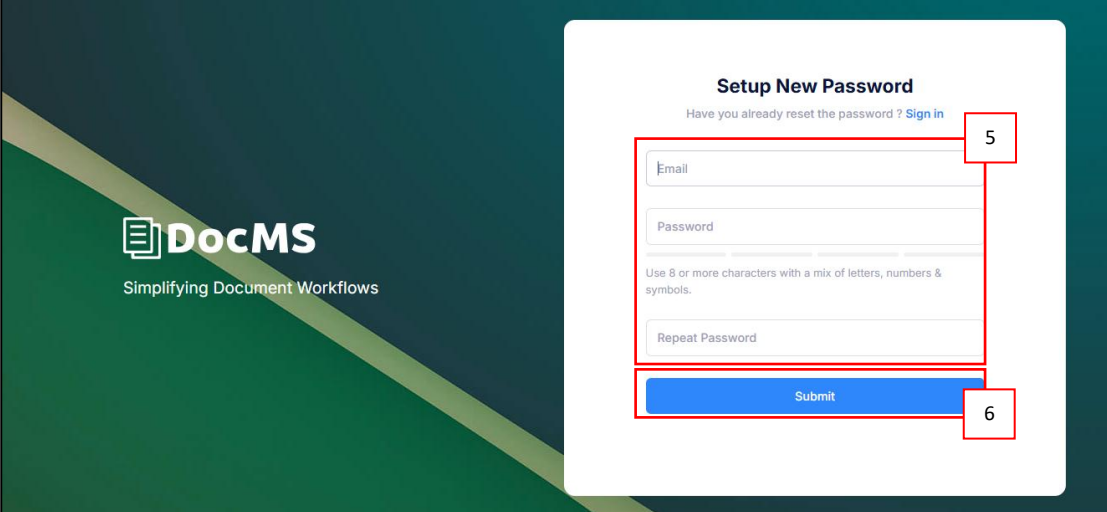
#### ii. Document Handling:

- After logging in, users can upload documents to the DMS.
- Users can view documents stored in the system.
- Users can search for specific documents using the search functionality and retrieve them for use.

## Chapter 3: User Manual

### 3.1. Reset Password





The image shows the 'Setup New Password' screen of the DocMS application. The background is a dark teal gradient with the DocMS logo and tagline 'Simplifying Document Workflows'. The main content area is a white card with the title 'Setup New Password' and a link to 'Sign in' if the user has already reset their password. The form includes three input fields: 'Email', 'Password', and 'Repeat Password'. A red box labeled '5' encompasses the 'Email' and 'Password' fields. Another red box labeled '6' encompasses the 'Repeat Password' field and the 'Submit' button. Below the 'Repeat Password' field, there is a note: 'Use 8 or more characters with a mix of letters, numbers & symbols.'

**Setup New Password**  
Have you already reset the password ? [Sign in](#)

Email

Password

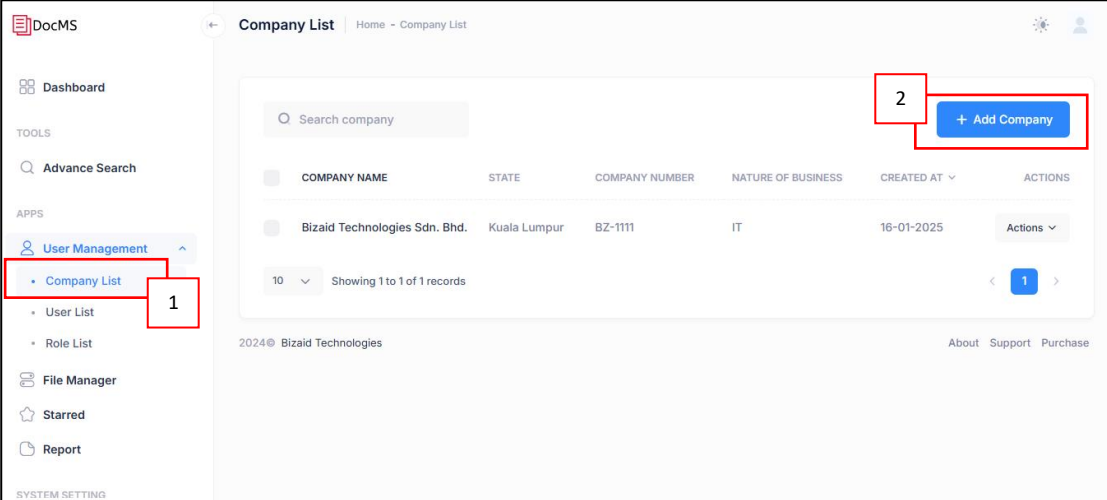
Repeat Password

Use 8 or more characters with a mix of letters, numbers & symbols.

Submit

## 3.2. Company Setup

### 3.2.1. Create Company



The image shows the 'Company List' screen of the DocMS application. The left sidebar contains a navigation menu with 'User Management' expanded, showing 'Company List' (labeled 1), 'User List', and 'Role List'. The main content area has a search bar (labeled 2) and a '+ Add Company' button. Below the search bar is a table with columns: COMPANY NAME, STATE, COMPANY NUMBER, NATURE OF BUSINESS, CREATED AT, and ACTIONS. The table contains one record for 'Bizaid Technologies Sdn. Bhd.' with details: Kuala Lumpur, BZ-1111, IT, and 16-01-2025. The footer shows '2024 © Bizaid Technologies' and links for 'About', 'Support', and 'Purchase'.

DocMS

Company List | Home - Company List

Dashboard

TOOLS

Advance Search

APPS

User Management

Company List

User List

Role List

File Manager

Starred

Report

SYSTEM SETTING

Search company

+ Add Company

COMPANY NAME	STATE	COMPANY NUMBER	NATURE OF BUSINESS	CREATED AT	ACTIONS
Bizaid Technologies Sdn. Bhd.	Kuala Lumpur	BZ-1111	IT	16-01-2025	Actions

10 Showing 1 to 1 of 1 records

2024 © Bizaid Technologies

About Support Purchase

### Add Company

3

Company Name \*

Full Company Name

Register Date

dd/mm/yyyy

Register Number

Company Register Number

Address

Company Address

State

State

Nature of Business

Food and Beverage

Discard

Submit

4

### 3.2.2. Modify Company

DocMS

Dashboard

TOOLS

Advance Search

APPS

User Management

- Company List
- User List
- Role List

File Manager

Starred

Report

SYSTEM SETTING

Company List

Home - Company List

Search company

+ Add Company

	COMPANY NAME	STATE	COMPANY NUMBER	NATURE OF BUSINESS	CREATED AT	ACTIONS
	Bizaid Technologies Sdn. Bhd.	Kuala Lumpur	BZ-1111	IT	16-01-2024	<div>1</div> <div>Actions</div> <div>2</div> <div>View</div> <div>Edit</div> <div>Deactive</div>

Showing 1 to 1 of 1 records

2024 © Bizaid Technologies

The 'Edit Company' form contains the following fields and buttons:

- Company Name \***: Bizaid Technologies Sdn. Bhd. (Callout 3 points to this field)
- Register Date**: 09/01/2025
- Register Number**: BZ-1111
- Address**: Wisma Goshen
- State**: Kuala Lumpur
- Nature of Business**: IT
- Buttons**: Discard, Submit (Callout 4 points to this button)

### 3.2.3. Deactivate Company

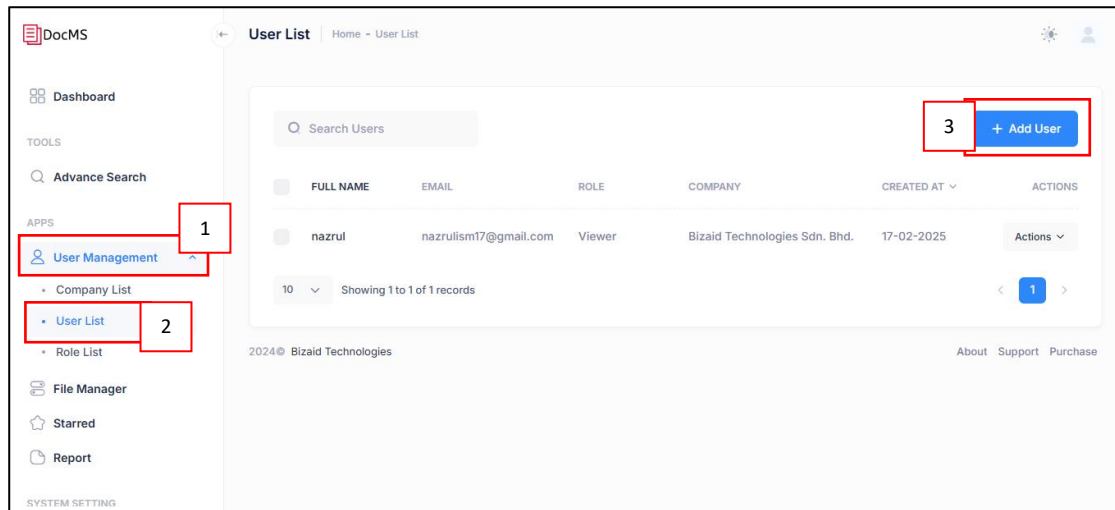
The 'Company List' table displays the following data:

	COMPANY NAME	STATE	COMPANY NUMBER	NATURE OF BUSINESS	CREATED AT	ACTIONS
	Bizaid Technologies Sdn. Bhd.	Kuala Lumpur	BZ-1111	IT	16-01-2025	<div>1 Actions</div> <div>2 View Edit Deactive</div>

Additional UI elements include a search bar, '+ Add Company' button, pagination (Showing 1 to 1 of 1 records), and a sidebar with navigation links like 'User Management' and 'Company List'.

## 3.3. User Setup

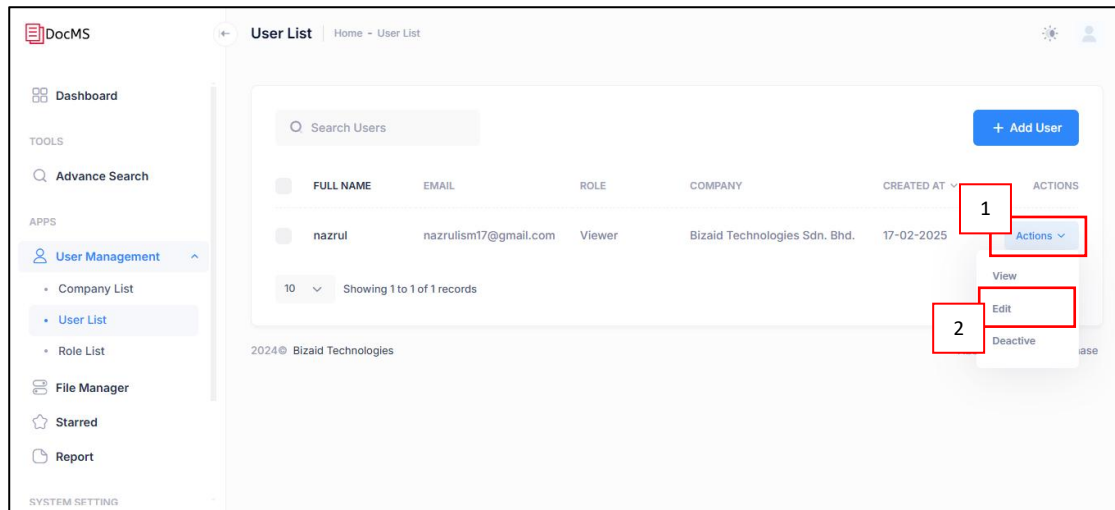
### 3.3.1. Create User



The screenshot shows the 'Add User' modal form. The form contains four required fields: 'Full Name \*', 'Email \*', 'Company \*', and 'Role \*'. Each field has a corresponding input box. The 'Full Name' field is highlighted with a red box and labeled '4'. At the bottom of the form, there are two buttons: 'Discard' and 'Submit'. The 'Submit' button is highlighted with a red box and labeled '5'.

### 3.3.2. Modify User





**Edit User**

3

Full Name \*

nazrul

Email \*

nazrulism17@gmail.com

Company \*

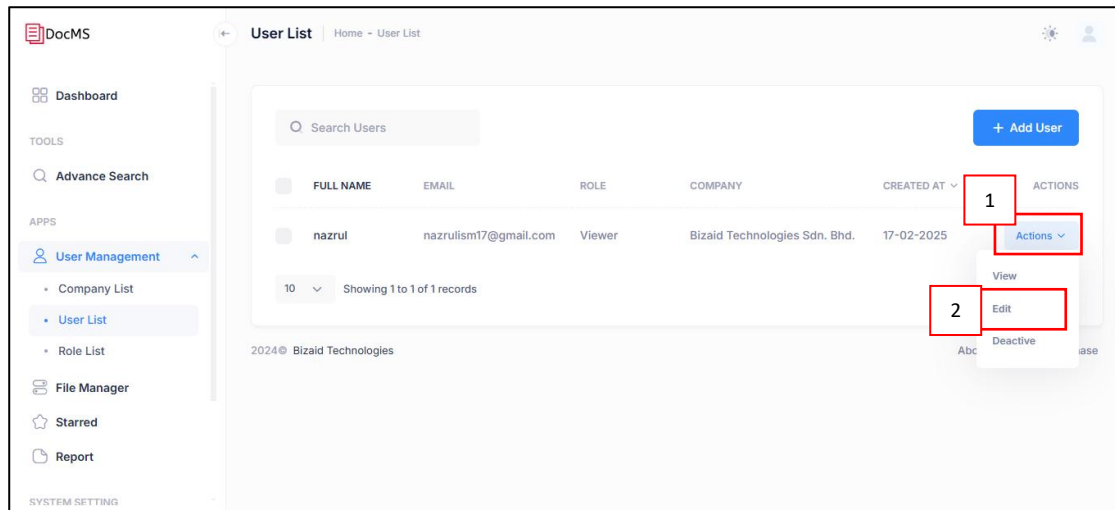
× Bizaid Technologies Sdn. Bhd. ×

Role \*

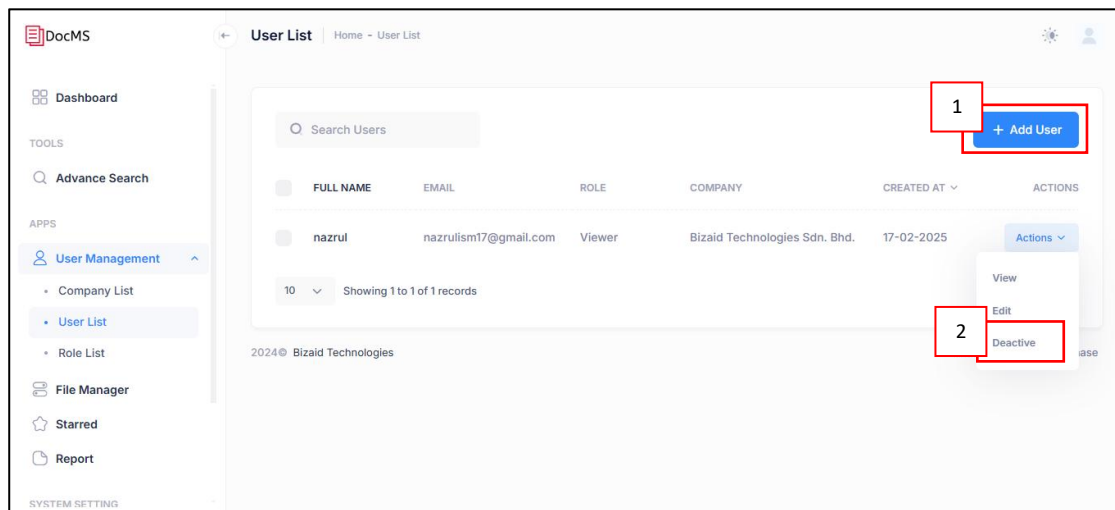
Viewer

Discard Submit 4

### 3.3.3. Modify User

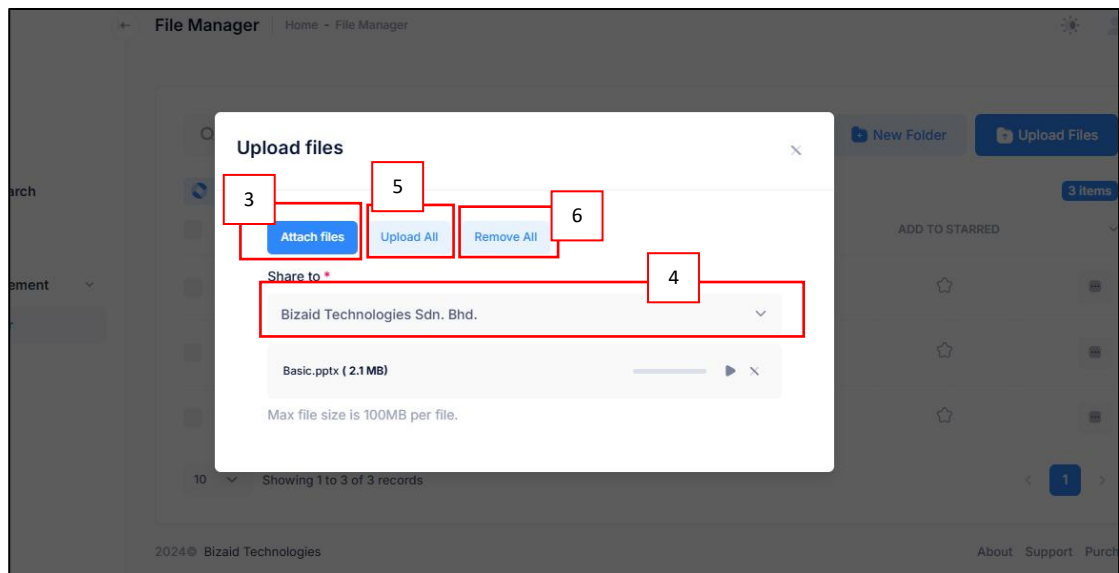
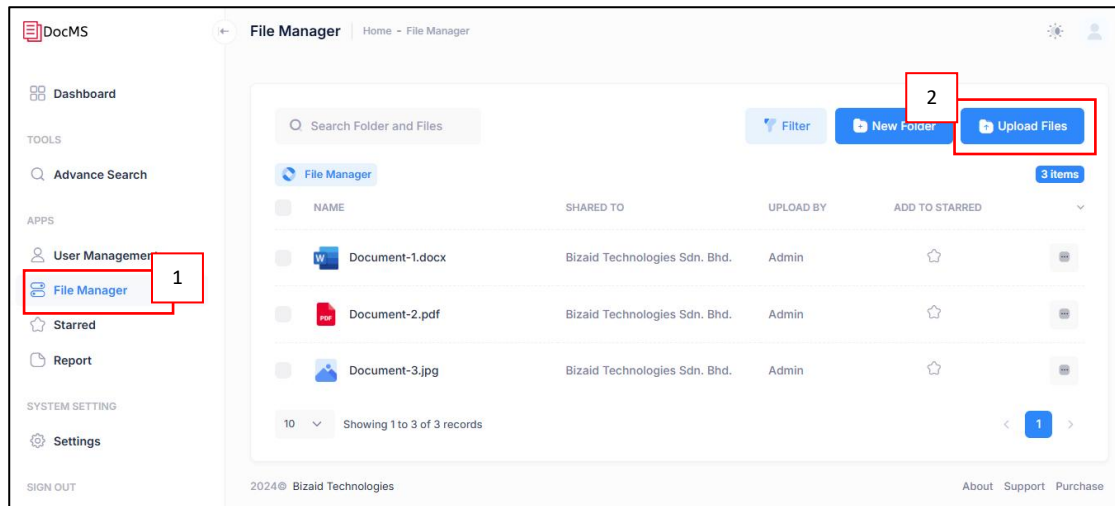


### 3.3.4. Deactivate User

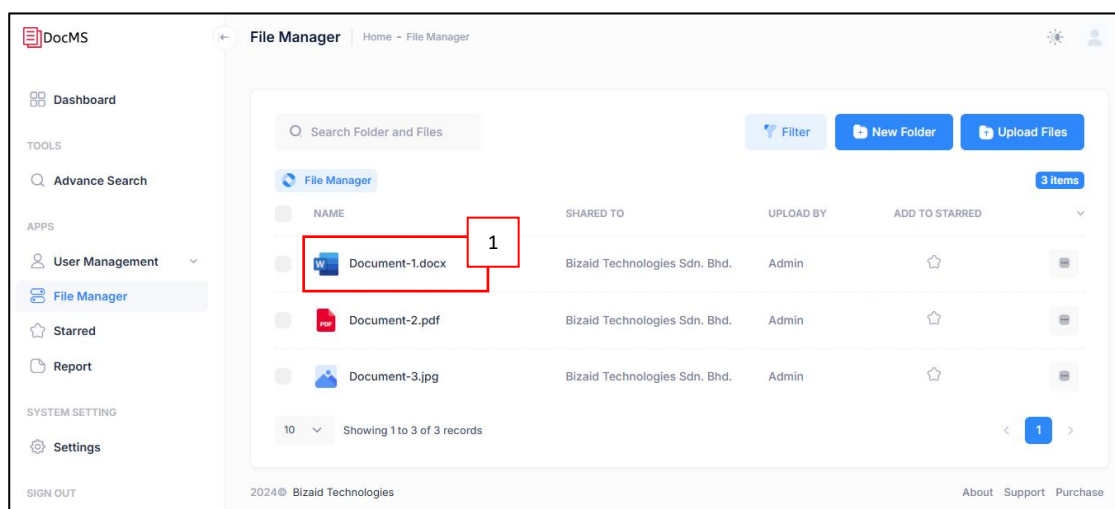


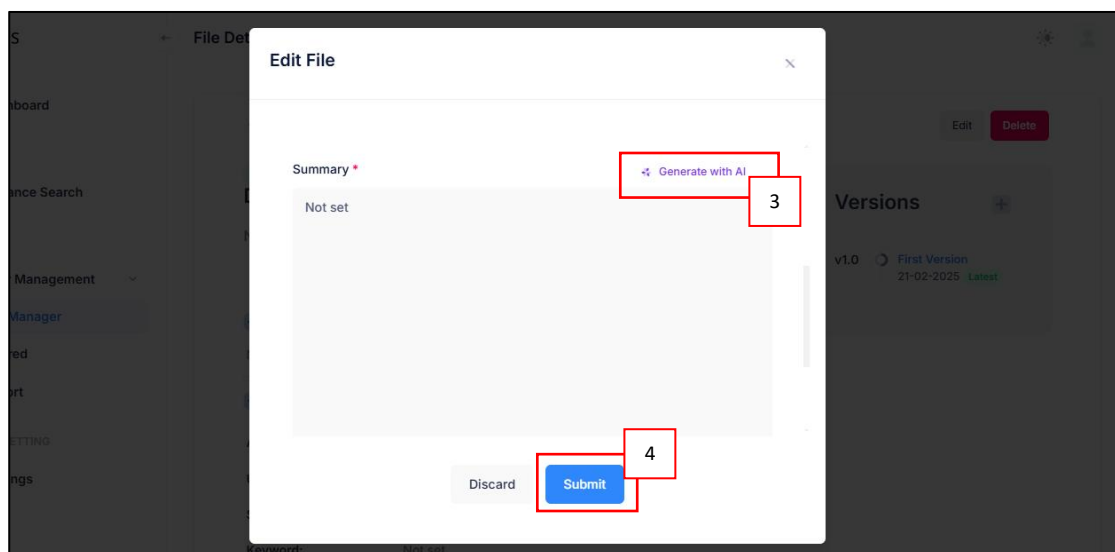
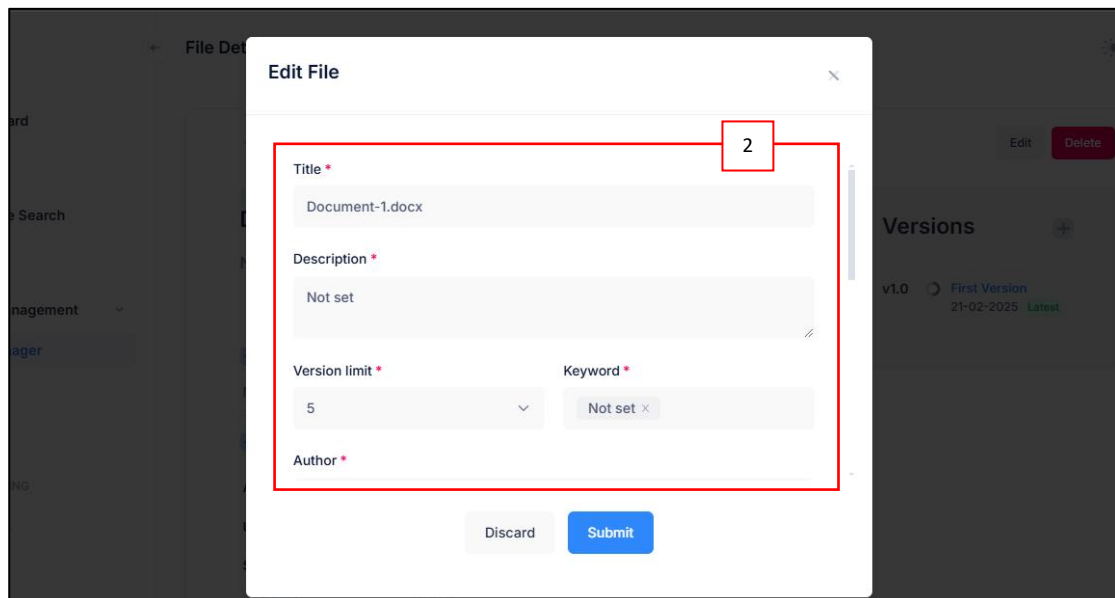
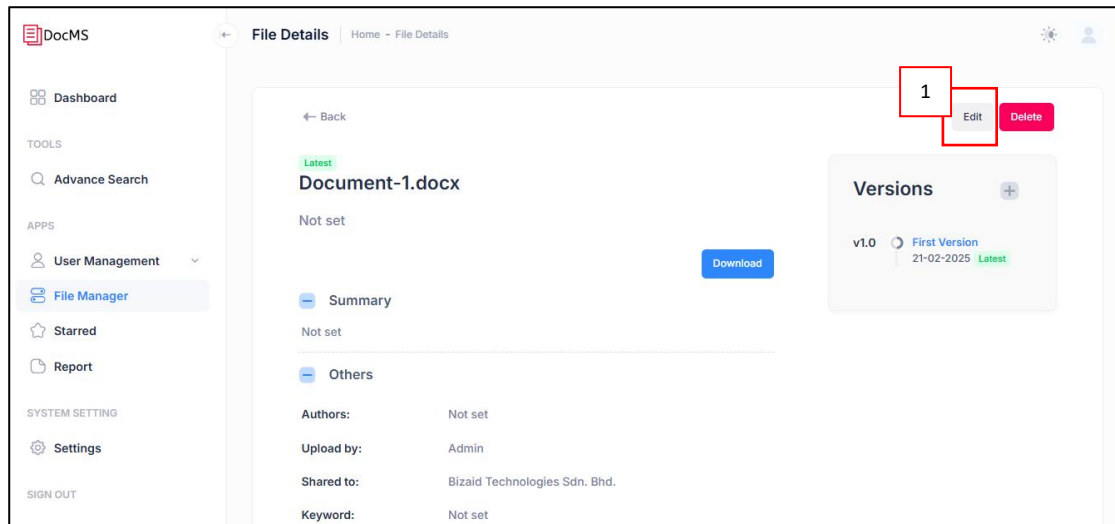
## 3.4. Document Management

### 3.4.1. Upload Document

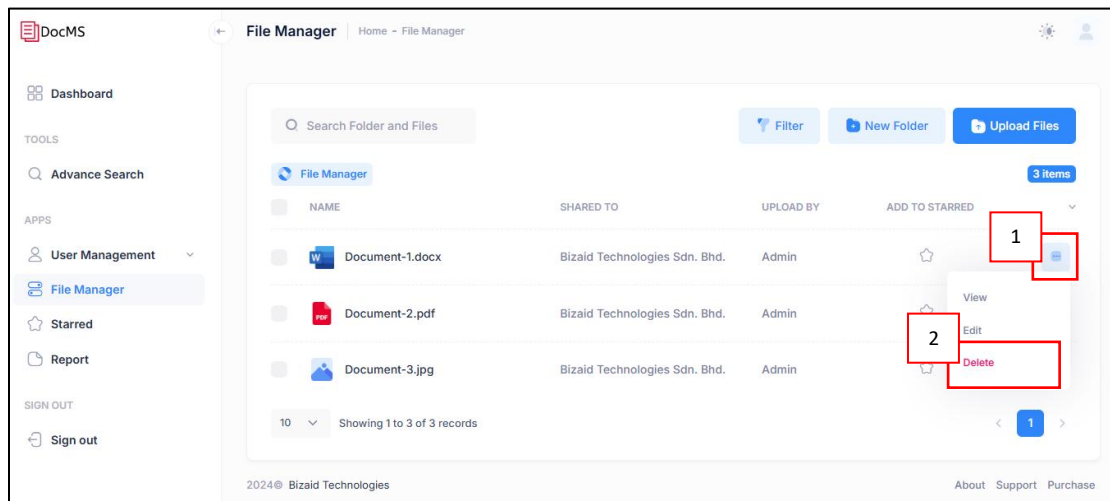
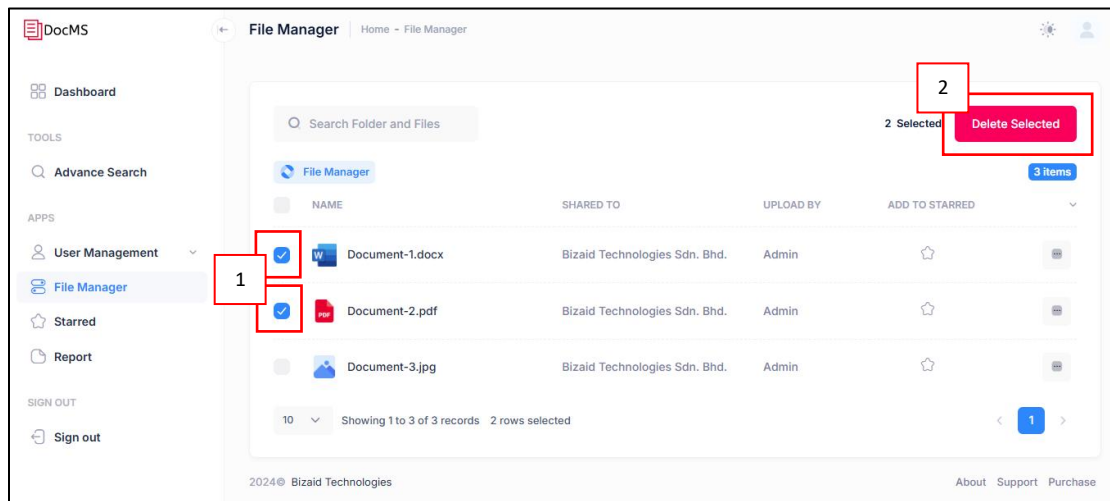


### 3.4.2. Edit Document detail

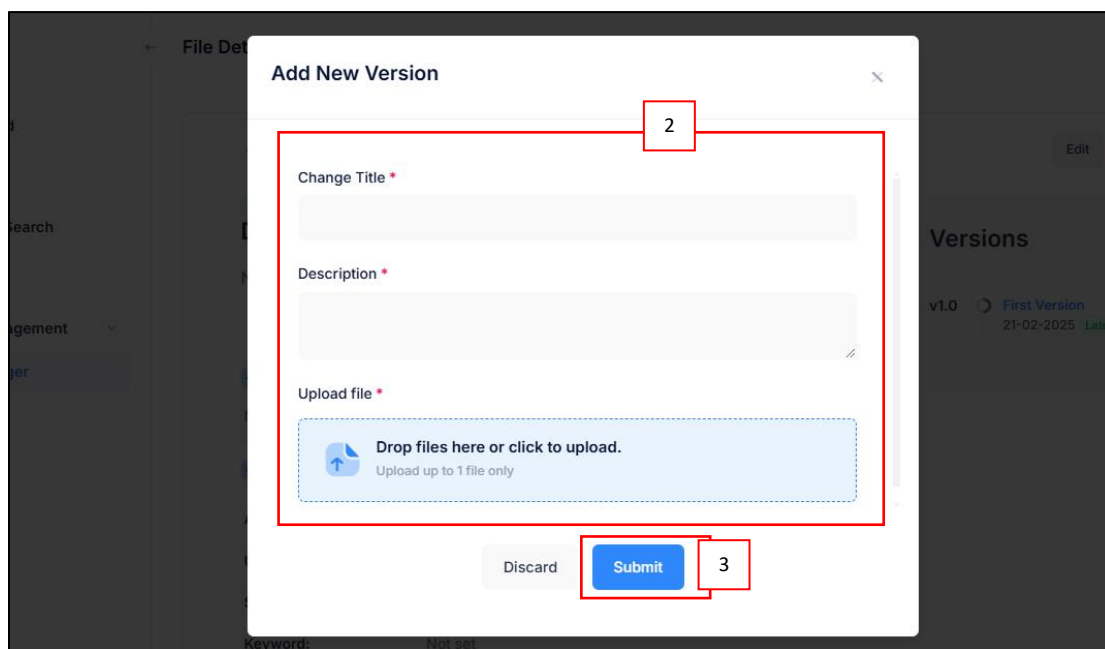
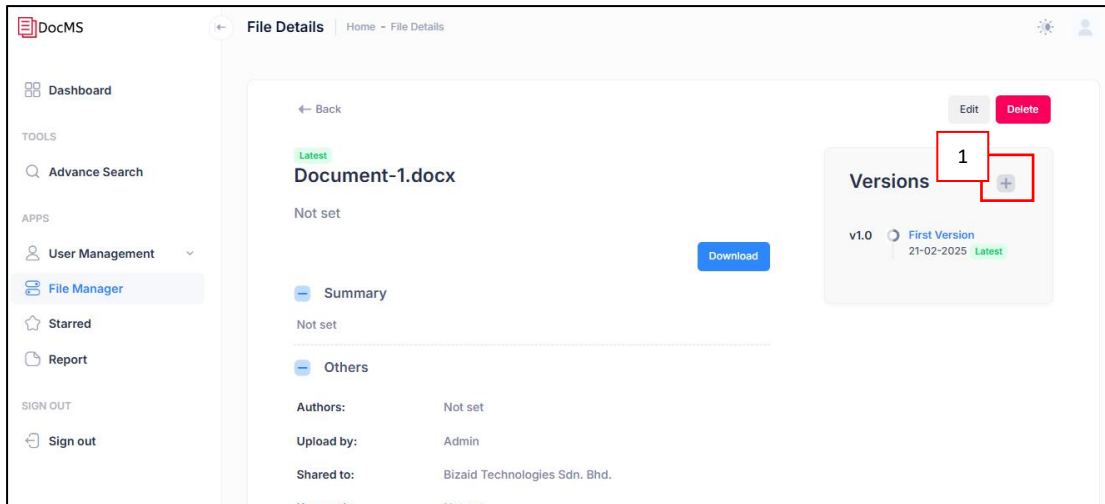




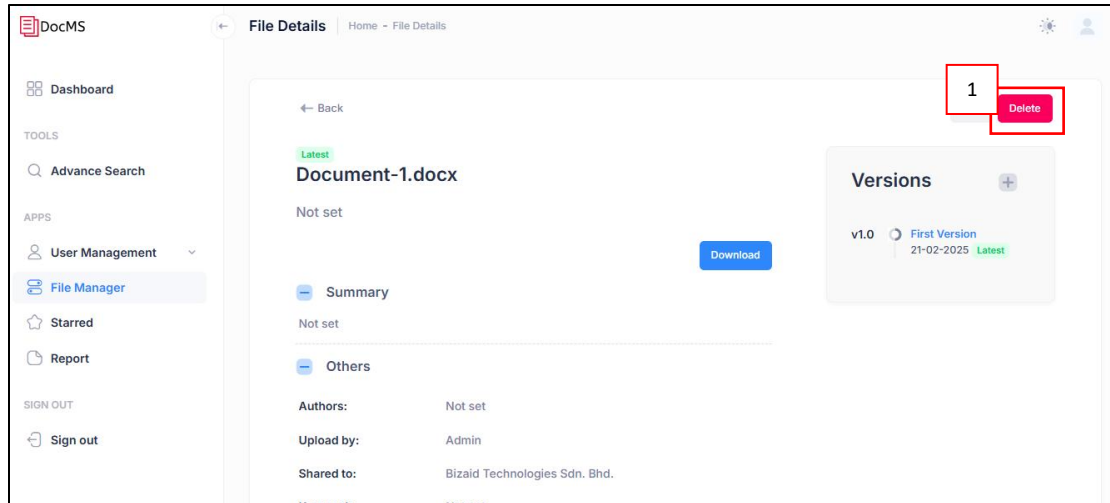
### 3.4.3. Delete Document



### 3.4.4. Add New Version



### 3.4.5. Delete Current Version



### 3.5. Generate Report

