
Knowledge Management System

User Manual

Draft Version

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1. Introduction

This document captures the user manual for the Knowledge management portal to be developed for the client. The scope of the Knowledge management portal is to build a repository of all the knowledge materials being used by state and national teams. This portal will have options for upload and approval of knowledge material. Users of the portal can search for knowledge material using various search parameters. There will be usage and audit report available from the portal

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1.1 Overview

The objective of KMC is to create and manage systems that will provide project staff and communities with relevant, timely information and facilitate exchange of knowledge throughout the project system to support –

- 1. Project Objectives and System*
- 2. Forge Strategic Partnerships*
- 3. Staff and community learning*
- 4. Create a brand identity for NRLM*
- 5. Advocate for Rural Poor and issues related to them*

The portal will have following user interfaces based on the user roles and categories –

- 1. User registration*
- 2. User login*
- 3. Password reset*
- 4. User role to category mapping*
- 5. User role to knowledge management category mapping*
- 6. Upload knowledge material*
- 7. Search and download knowledge material*
- 8. Knowledge material details*
- 9. View upload*
- 10. Reports*
- 11. Event upload*
- 12. Event view*

2. Getting Started

2.1 Cautions & Warnings

The entire system is role based. Users will be mapped with their roles and system will display their dashboard accordingly. Admin will map the system pages with roles thus the users of their roles can access the limited pages which are required for their work.

Hence, user should keep their credential confidential without sharing to other users. Users can access their dashboard can perform their activities.

2.2 Set-up Considerations

Users must have their system to run this web-based application. For this user must have the internet connection and with minimum requirements of machine.

2.3 User Access Considerations

Users can access their own dashboard by login through their credential. In case the user forgot their password, system provides facility to get the password back using “Forgot Password” feature.

2.4 Accessing the System

While accessing the system user must have their credentials. Without any valid credential user cannot access their dashboard.

2.5 System Organization & Navigation

The entire functional scope for the application has been decomposed into three core modules namely:

Masters: - Includes all the master pages required to manage and create the knowledge material. It also includes the user and role creation and management.

- a) User Creation
- b) Role
- c) State
- d) Language
- e) KM Vertical Type
- f) File Type
- g) Document Category
- h) Document Source
- i) Event Type

Knowledge Material Management: - This module includes the pages for creation and management of knowledge material. Also, it facilitates admin to approve and publish the

knowledge material created by users. Admin can give ratings and review for each knowledge material.

- a) Add Knowledge Material
- b) List of Knowledge Material
- c) Search Knowledge Material

Event Management: - Even can be created and published from this module. Admin can create events which can be seen through users in their calendar.

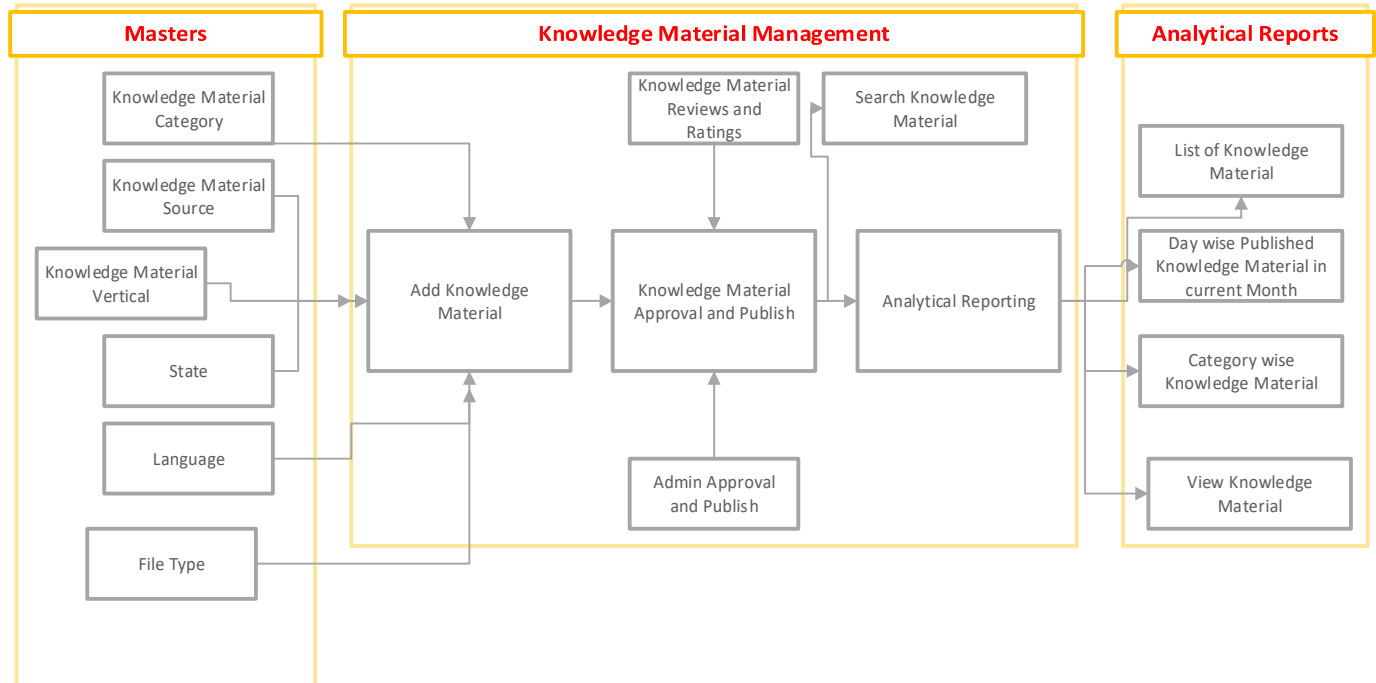
- a) Add Event
- b) View Event

2.6 Exiting the System

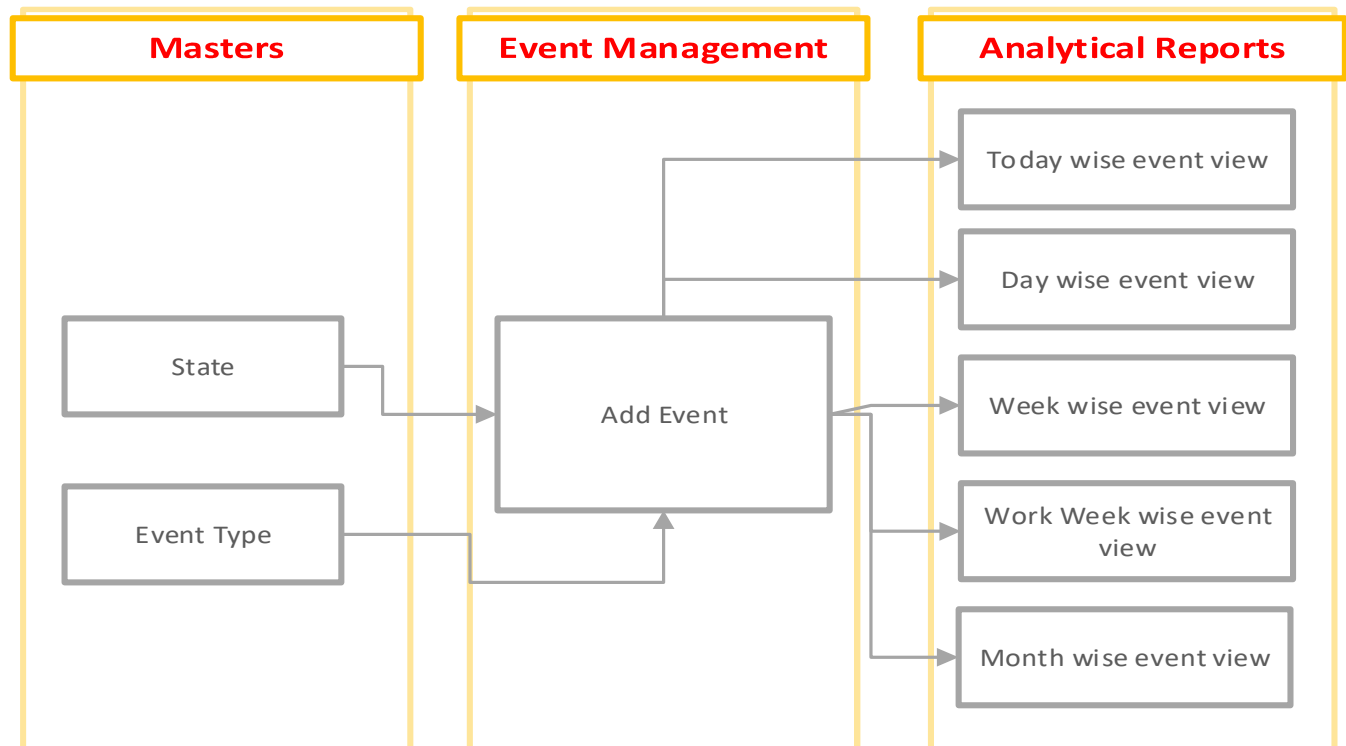
User will have to logout to exit the system.

3. Using the System

System features and modules are described below of sub sections. Following are the flow of the process of the entire system :-



Event Management



3.1 User Management

This section captures the requirement around the user registration, user role mapping, role management, user category management, category management, user password management and user deactivation.

New users will be presented with a screen to perform registration activity. While registering, user will enter following information –

- a. First name(mandatory): no validation
- b. Last name(mandatory): no validation
- c. Department: No validation
- d. Role(mandatory): to be selected from the dropdown of predefined roles
- e. Email id(mandatory): email id format to be validated
- f. User id(mandatory): No validation
- g. Mobile number: Numeric 10 digit
- h. State/National(mandatory): If state is selected, name of the state to be selected from the dropdown of predefined state names
- i. Password(mandatory): To be alpha-numeric with minimum 8 characters and maximum 15 characters, having at least one number, one alphabet in upper case and one special character
- j. Security challenge question & answer:
- k. Receive notification? – mandatory, dropdown values ‘Yes’ and ‘No’

User will be able to reset his/her password in case he/she forgets it or due to security compromise, the same can be done by answering previously saved answers of the challenge questions.

The screenshot shows the 'User Creation' form within the KMS application. The form is titled 'User Creation' and has a close button (X) in the top right corner. The form is divided into two main sections: 'Masters' on the left and 'Reports' on the right. The 'Masters' section contains a list of categories: Doc Source, Doc Category, Event Type, File Type, KM Vertical Type, Language, User Creation, State, and Role. The 'Reports' section is currently empty. The form fields are as follows:

- Email Id *
- User Id *
- First Name *
- Last Name *
- Department * (dropdown menu)
- Role * (dropdown menu)
- Mobile No *
- State * (dropdown menu)
- Password *
- Confirm Password *
- Active! ☐

At the bottom right of the form, there are three buttons: 'Save', 'Get List', and 'Close'.

3.2 Role Creation

This page helps to understand the process of role creation. Different roles of KMS users can be created by admin so that these roles can be further mapped to users. Based on the role of the user, the dashboard will be appear.

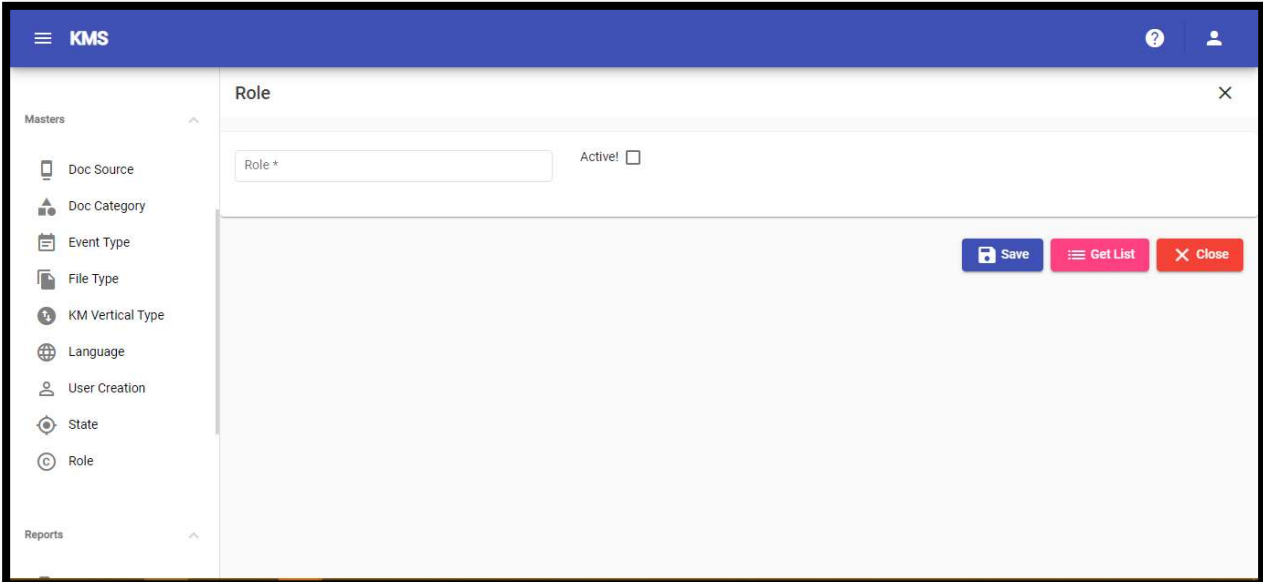
New User role creation

New roles will be presented with a screen to perform creation activity. While creation, admin will enter following information –

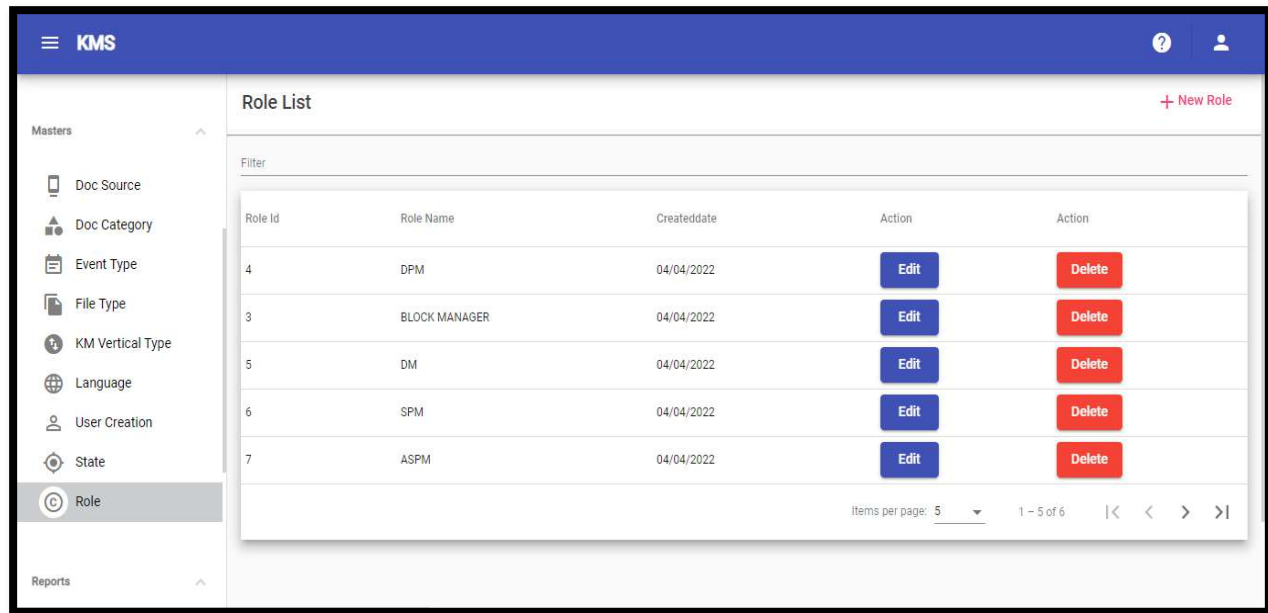
- Role name(mandatory): no validation, Textbox
- Active (mandatory): no validation, Checkbox
- Save Button
- Close Button
- Check List Button: to check the created roles

List of User Role

Roles which are created by admin can be visualized through Role list. Also, there will be facility to edit and delete the roles.



The screenshot displays the 'Role' creation form within the KMS application. The interface features a blue header bar with the 'KMS' logo and a user profile icon. A left sidebar lists various 'Masters' including Doc Source, Doc Category, Event Type, File Type, KM Vertical Type, Language, User Creation, State, and Role. The main content area is titled 'Role' and contains a form with a 'Role *' text input field and an 'Active?' checkbox. At the bottom right of the form, there are three buttons: 'Save' (blue), 'Get List' (pink), and 'Close' (red).



3.3 State Master

This page helps to create new states. Created states are further used while creating user, knowledge material and Events. Admin can create the state list as per the requirement.

New User state creation

New states will be presented with a screen to perform creation activity. While creation, admin will enter following information –

- Country name(mandatory): no validation, Dropdown
- State Name (mandatory): no validation, Dropdown
- Active (mandatory): no validation, Checkbox
- Save Button
- Close Button
- Check List Button: to check the created states

List of User states

States which are created by admin can be visualized through State list. Also, there will be facility to edit and delete the particular states.

KMS

State

Country * State * Active! ☐

Save Get List Close

KMS

State List + New State

Filter

State Id	State Name	Country Name	Createddate	Action	Action
2	CHHATTISGARH	INDIA	23/03/2022	Edit	Delete
5	ODISHA	INDIA	02/04/2022	Edit	Delete
6	DELHI	INDIA	02/04/2022	Edit	Delete
9	JHS	INDIA	11/04/2022	Edit	Delete
13	Hello	INDIA	20/04/2022	Edit	Delete

Items per page: 5 1 - 5 of 9 |< < > >|

3.4 Language Master

This page is about creating languages for the knowledge material, so that list of languages can be displayed while creation of knowledge material and user can select their language. This will restrict unnecessary ambiguity of different entry for the same language.

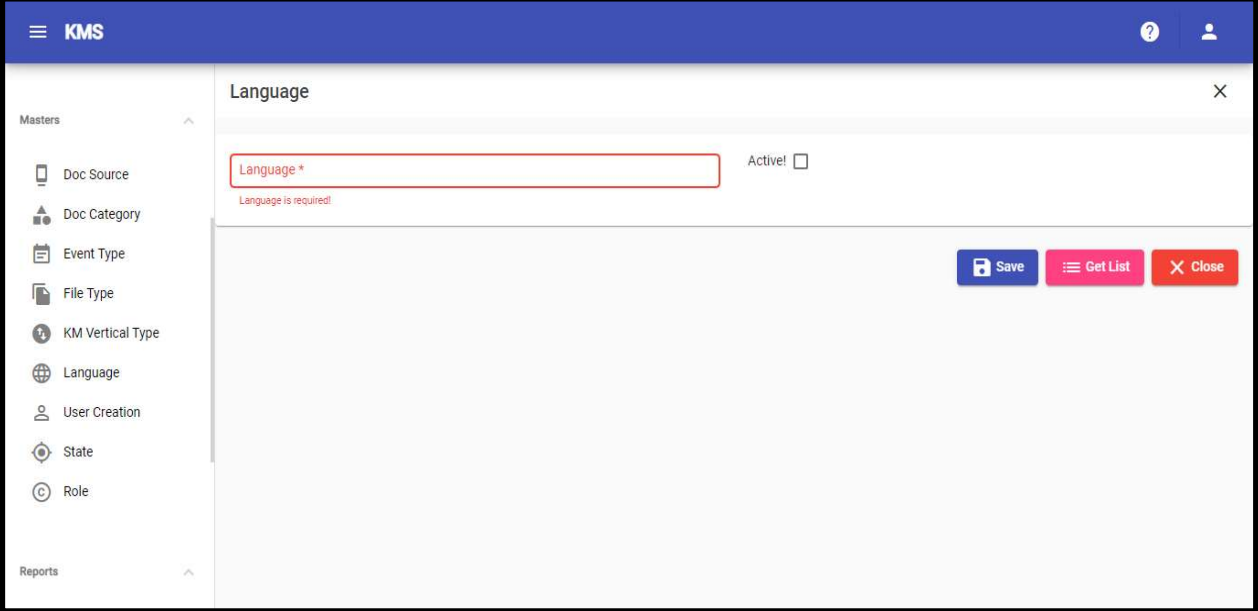
New Language creation

New languages will be presented with a screen to perform creation activity. While creation, admin will enter following information –

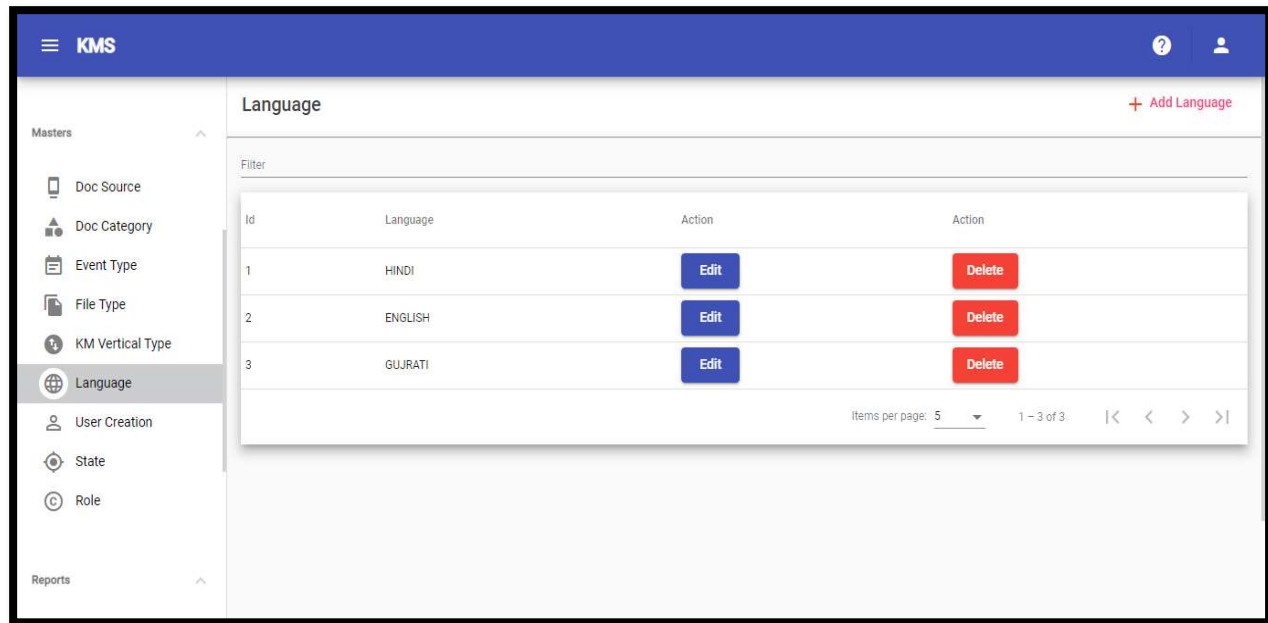
- a. Language name(mandatory): no validation, Textbox
- b. Active (mandatory): no validation, Checkbox
- c. Save Button
- d. Close Button
- e. Check List Button: to check the created language

List of Language

Languages which are created by admin can be visualized through the list. Also, there will be facility to edit and delete the created languages



The screenshot displays the 'Language' creation form within the KMS application. The interface features a blue header bar with the 'KMS' logo and a user profile icon. A left sidebar lists various 'Masters' including Doc Source, Doc Category, Event Type, File Type, KM Vertical Type, Language, User Creation, State, and Role. The main content area is titled 'Language' and contains a form with a 'Language*' text input field and an 'Active' checkbox. A red border around the text input field indicates a validation error, with the message 'Language is required!' displayed below it. At the bottom right of the form, there are three buttons: 'Save' (blue), 'Get List' (pink), and 'Close' (red).



3.5 KM Vertical Type

This page is about creating knowledge material vertical type for the knowledge material.

New vertical type creation

New types will be presented with a screen to perform creation activity. While creation, admin will enter following information –

- Vertical Type name(mandatory): no validation, Textbox
- Active (mandatory): no validation, Checkbox
- Save Button
- Close Button
- Check List Button: to check the created language

List of vertical type

Types which are created by admin can be visualized through the list. Also, there will be facility to edit and delete the created types.

KM Vertical Type

KM Vertical type *

KM Vertical Type is required!

Active? ☐

Save Get List Close

KM Vertical Type + Add KM Vertical Type

Filter

Id	KM Vertical Type	Action	Action
1	FNHW	Edit	Delete
2	IBCB	Edit	Delete
3	Farm livelihood	Edit	Delete
4	Non-Farm	Edit	Delete
5	Text document	Edit	Delete

Items per page: 5 1 - 5 of 9 |< < > >|

3.6 File Type

This page is about creating file type for the knowledge material.

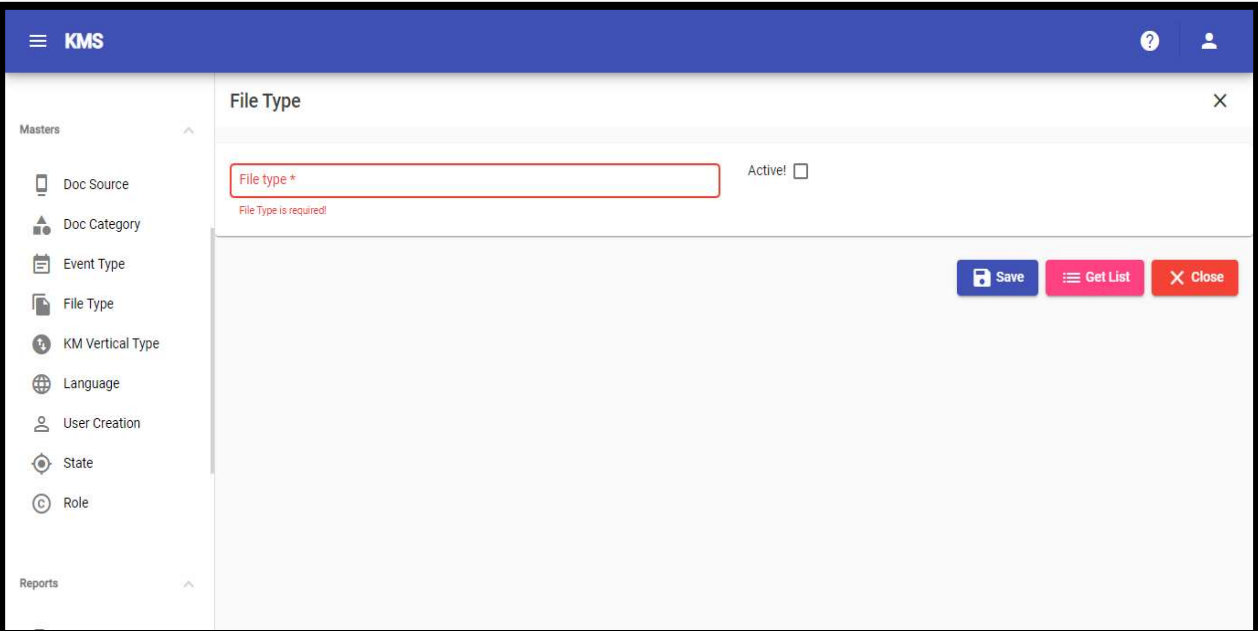
New file type creation

New types will be presented with a screen to perform creation activity. While creation, admin will enter following information –

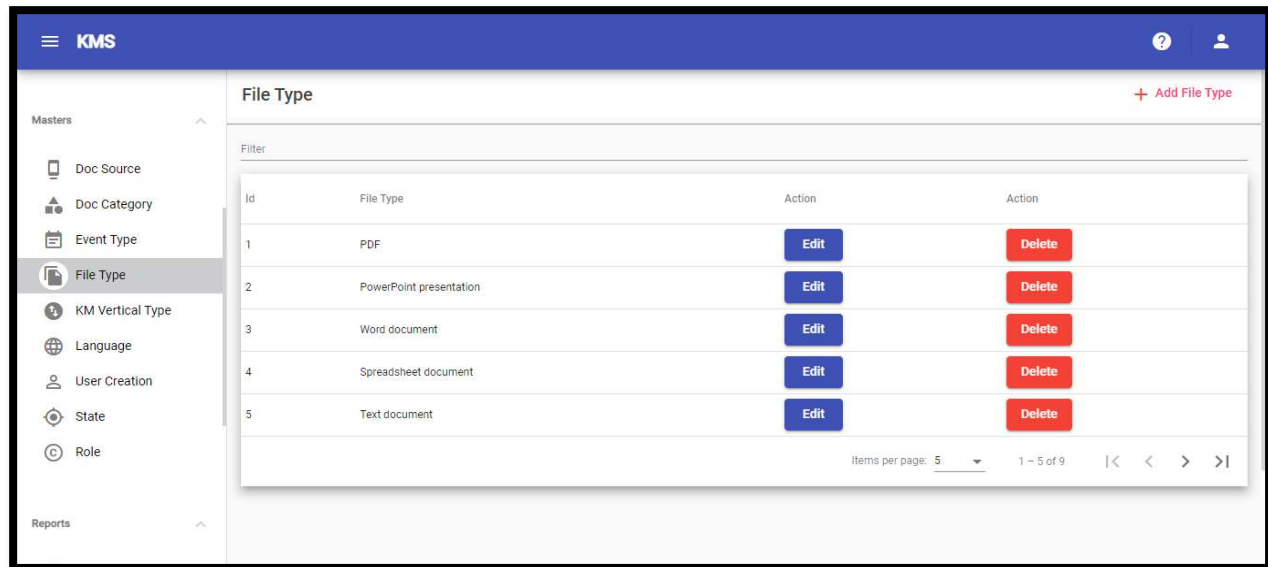
- a. File Type name(mandatory): no validation, Textbox
- b. Active (mandatory): no validation, Checkbox
- c. Save Button
- d. Close Button
- e. Check List Button: to check the created file type

List of file type

File types which are created by admin can be visualized through the list. Also, there will be facility to edit and delete the created types.



The screenshot displays the 'File Type' creation interface within the KMS application. The interface features a blue header bar with the 'KMS' logo and a user profile icon. A left sidebar lists various 'Masters' including Doc Source, Doc Category, Event Type, File Type, KM Vertical Type, Language, User Creation, State, and Role. The main content area is titled 'File Type' and contains a form with a text input field labeled 'File type *' and an 'Active!' checkbox. A red error message 'File Type is required!' is visible below the input field. At the bottom right of the form, there are three buttons: 'Save' (blue), 'Get List' (pink), and 'Close' (red).



3.7 Event Type

This page is about creating event type for the event management.

New event type creation

New types will be presented with a screen to perform creation activity. While creation, admin will enter following information –

- Event Type name(mandatory): no validation, Textbox
- Active (mandatory): no validation, Checkbox
- Save Button
- Close Button
- Check List Button: to check the created languages

List of event type

Event types which are created by admin can be visualized through the list. Also, there will be facility to edit and delete the created types.

KMS

Event Type

Event type *

Active! ☐

Save Get List Close

Masters

- Doc Source
- Doc Category
- Event Type**
- File Type
- KM Vertical Type
- Language
- User Creation
- State
- Role

Reports

KMS

Event Type List

+ New Event Type

Filter

Id	Event Type	Action	Action
5	Cultural	Edit	Delete
4	Conferences	Edit	Delete
3	Seminar	Edit	Delete
2	Workshops	Edit	Delete
1	TEST	Edit	Delete

Items per page: 5 1 - 5 of 5 |< < > >|

Masters

- Doc Source
- Doc Category
- Event Type**
- File Type
- KM Vertical Type
- Language
- User Creation
- State
- Role

Reports

3.8 Document Category

This page is about creating document category for knowledge material.

New document category creation

New categories will be presented with a screen to perform creation activity. While creation, admin will enter following information –

- Category Code(mandatory): no validation, Textbox
- Category Name(mandatory): no validation, Textbox
- Category Order(mandatory): no validation, Textbox
- Active (mandatory): no validation, Checkbox

- e. Save Button
- f. Close Button
- g. Check List Button: to check the created document category

List of document category

Document Categories which are created by admin can be visualized through the list. Also, there will be facility to edit and delete the created categories.

The screenshot shows the 'Knowledge Material Category' form in the KMS application. The form has a left sidebar with a 'Masters' section containing links to Doc Source, Doc Category, Event Type, File Type, KM Vertical Type, Language, User Creation, State, and Role. The main form area has a title 'Knowledge Material Category' and a close button. It contains three input fields: 'Knowledge Material Category Code *' (with a red border and error message 'Knowledge Material Category Code is required!'), 'Knowledge Material Category *' (with a red border and error message 'Knowledge Material Category is required!'), and 'Knowledge Material Category Order' (with a value of 0). There is also an 'Active!' checkbox. At the bottom right, there are three buttons: 'Save' (blue), 'Get List' (pink), and 'Close' (red).

The screenshot shows the 'Knowledge Material Category List' in the KMS application. The left sidebar is the same as the previous screenshot, but 'Doc Category' is selected. The main area has a title 'Knowledge Material Category List' and a '+ New Knowledge Material Category' button. Below the title is a 'Filter' section. The main content is a table with the following data:

Id	Category Code	Category	Order	Created date	Action	Action
140	sdsd	sdsdsd	1	28/06/2022	Edit	Delete
139	category code	category123	12	21/06/2022	Edit	Delete
135	Video story	Video story	10	24/05/2022	Edit	Delete
134	Audio story	Audio story	89	24/05/2022	Edit	Delete
133	test566	test566	1	24/05/2022	Edit	Delete

At the bottom right of the table, there is a pagination control showing 'Items per page: 5' and '1 - 5 of 36', along with navigation arrows.

3.9 Document Source

This page is about creating document sources for knowledge material.

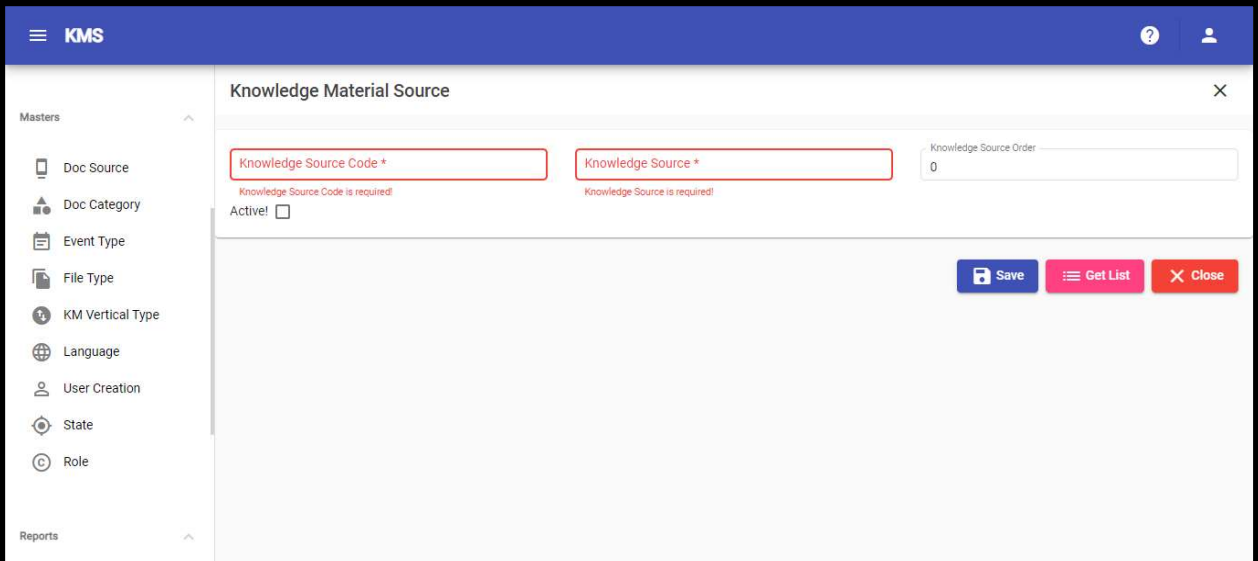
New document source creation

New sources will be presented with a screen to perform creation activity. While creation, admin will enter following information –

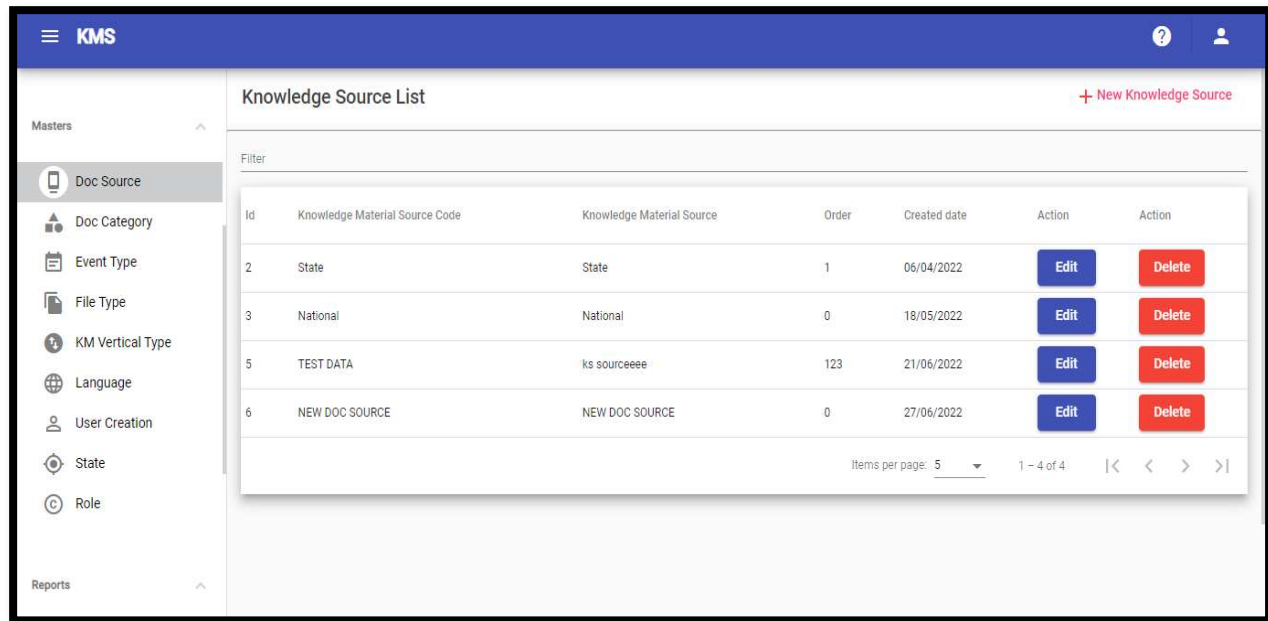
- Source Code(mandatory): no validation, Textbox
- Source Name(mandatory): no validation, Textbox
- Source Order(mandatory): no validation, Textbox
- Active (mandatory): no validation, Checkbox
- Save Button
- Close Button
- Check List Button: to check the created sources

List of document sources

Document sources which are created by admin can be visualized through the list. Also, there will be facility to edit and delete the created sources.



The screenshot displays the 'Knowledge Material Source' creation form within the KMS application. The interface features a blue header bar with the 'KMS' logo and a user profile icon. A left sidebar lists various 'Masters' including Doc Source, Doc Category, Event Type, File Type, KM Vertical Type, Language, User Creation, State, and Role. The main form area is titled 'Knowledge Material Source' and contains three input fields: 'Knowledge Source Code *', 'Knowledge Source *', and 'Knowledge Source Order'. The first two fields are highlighted with red borders and red error messages below them: 'Knowledge Source Code is required!' and 'Knowledge Source is required!'. The 'Knowledge Source Order' field has a value of '0'. Below the input fields is an 'Active!' checkbox. At the bottom right of the form, there are three buttons: 'Save' (blue), 'Get List' (pink), and 'Close' (red).



3.10 Knowledge Material Creation

This page includes the functionality of creating knowledge material by users and admin. User can upload their knowledge material for publish. To add new knowledge material, contributor will have to enter the following information -

File name – free text, mandatory

Knowledge material category – mandatory

- Newsletter
- e-Magazine
- Best practice
- Success story
- Video story
- Audio story
- Lesson learnt

Knowledge material source – mandatory

- National
- State

Cross-state publication – mandatory, list of values 'Yes' and 'No'. If 'Yes' selected, then the knowledge material can be accessed across the states.

Language – free text

Knowledge material vertical – This will be a drop down of list of values. Possible values of file type will be –

- FNHW
- IBCB
- Farm livelihood

- d. Non-Farm
- e. Text document
- f. FI
- g. Others

File type – This will be used for tagging and searching purpose. Actual validation of the uploaded file type will not be performed in the portal. Possible values of file type will be –

- a. Pdf
- b. PowerPoint presentation
- c. Word document
- d. Spreadsheet document
- e. Text document
- f. Bitmap file
- g. Jpeg file
- h. Video file
- i. Audio file

Approver name – free text

Approver designation – free text

Attach File

Tag - Free text. User defined tag for the uploaded document. User can add multiple tags by pressing enter after each tag.

If a file with same name and type already exists in the portal, user will be asked whether he/she wants to create a new version of the file or process a fresh upload.

User will receive a confirmation message on screen on successful upload. User will be able to perform in-line edit for a text document only.

The screenshot shows the 'Add Knowledge Material' form in the KMS portal. The form is divided into several sections:

- File Name ***: A text input field with a red border and an error message 'File Name is required!'.
- Knowledge Material category ***: A dropdown menu.
- Knowledge Material Source ***: A dropdown menu.
- State (Select) ***: A dropdown menu with a red border and an error message 'State is required!'.
- Cross State Publication ***: A dropdown menu with the value 'No'.
- Language**: A dropdown menu.
- Knowledge Material Vertical**: A dropdown menu.
- File type**: A dropdown menu.
- Approver Name**: A text input field.
- Approver Designation**: A text input field.
- Key Words ***: A text input field.
- Attach files**: A section with a 'Choose File' button and the text 'No file chosen'.

The form has a blue header with the KMS logo and a sidebar with navigation options. At the bottom right, there are 'Save' and 'Close' buttons.

3.11 List of Knowledge Material

This page helps to display the knowledge materials created by users and admin. Also, this use case facilitates admin to approve the created knowledge materials so that these approved knowledge materials can be published by admin in the portal and in Ajeevika portal. Admin can rate and review the knowledge material.

Knowledge material Approval and Publishing

Admin can review the knowledge Material details and can approve and publish the same in the portal and Aajeevika Portal.

Knowledge material rating and feedback

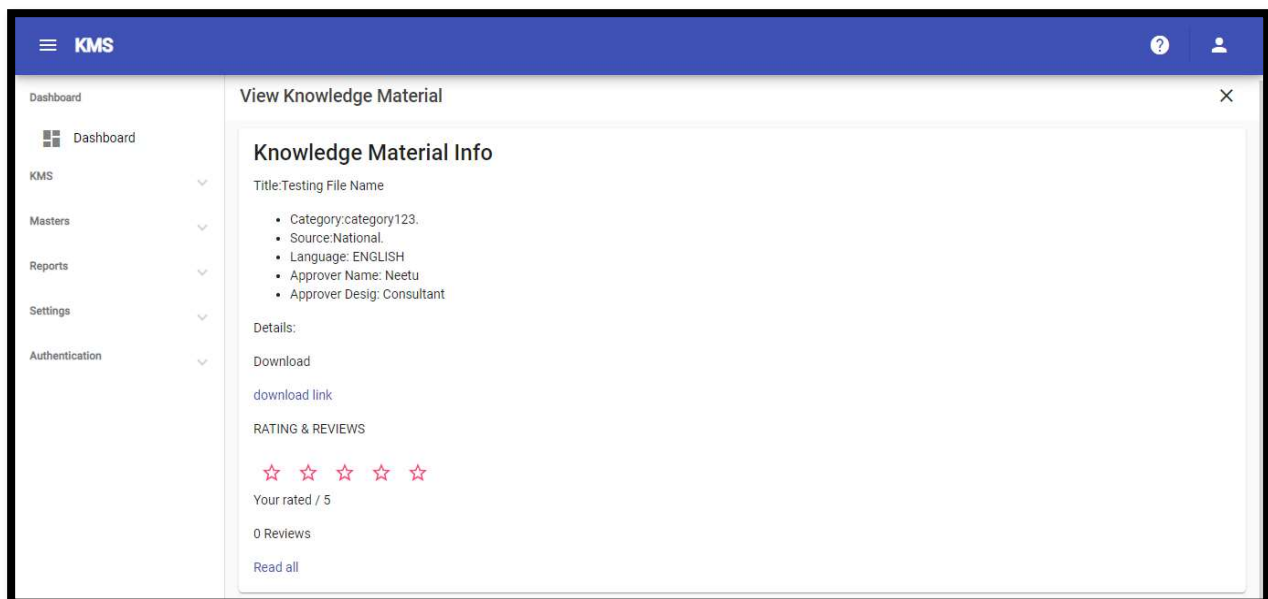
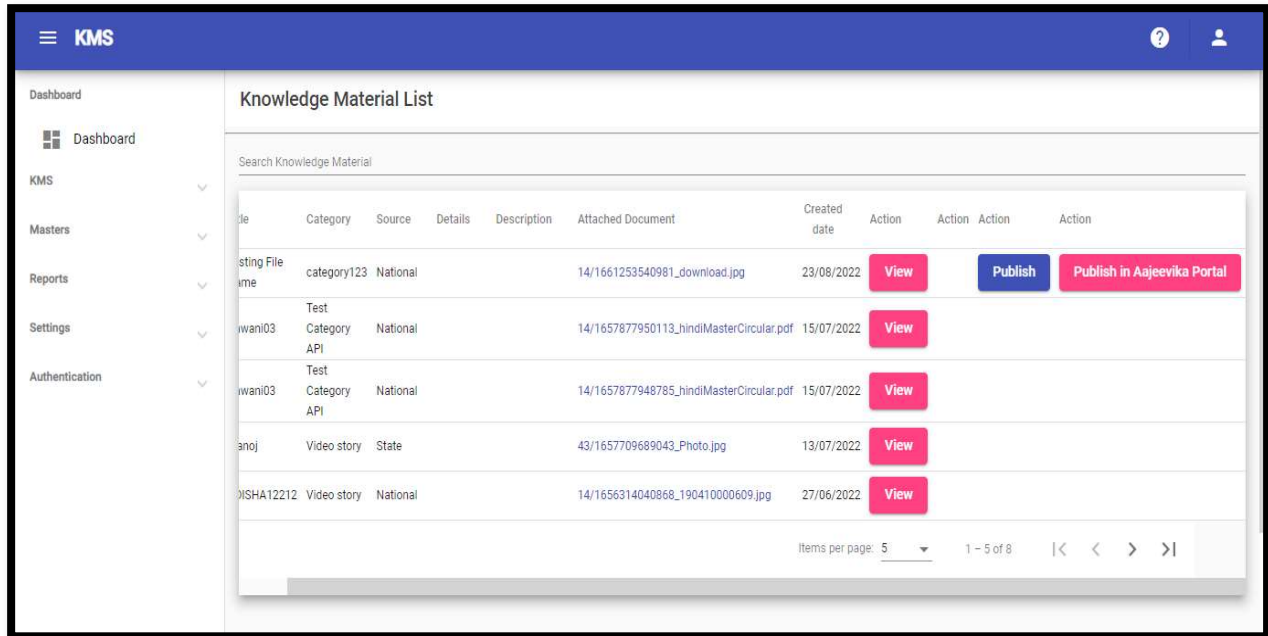
Admin will be able to rate a knowledge material as well as provide comment in the feedback. Following will be the details of the process

- Rating – User can enter a rating from dropdown in the scale of 1 to 5 with 1 being lowest rating and 5 being highest rating.
- Feedback – free text. User can enter his/her comment as feedback in this field

Average rating and all the feedbacks received for a knowledge material will be displayed against the knowledge material in the knowledge material details screen.

Id	Title	Category	Source	Details	Description	Attached Document	Created date	Action	Action	Action	Action
40	Dhwan03	Test Category API	National			14/1657877950113_hindlMasterCircular.pdf	15/07/2022	View			
39	Dhwan03	Test Category API	National			14/1657877948785_hindlMasterCircular.pdf	15/07/2022	View			
38	manoj	Video story	State			43/1657709689043_Photo.jpg	13/07/2022	View			
37	ODISHA12212	Video story	National			14/1656314040868_190410000609.jpg	27/06/2022	View			
29	test	category123	State			14/1656153170972_190410000001.jpg	25/06/2022	View			

Items per page: 5 1 - 5 of 7 |< < > >|



3.12 Search Knowledge Material

This page helps user to search the required knowledge material. User need to enter mandatory filters to search out the materials. User can also give feedback and can rate the knowledge material from this page.

Knowledge material search and download

User will be able to search knowledge material based on the following search criteria -

File name – free text. There will a type ahead search available in this field. After entering 3 characters of the file name, application will start suggesting the matching file names. Ranking based search will also happen as the use of the portal increases. Machine learning based

algorithms will be used where User will rank the search result so that subsequent search will be precise and more effective.

Knowledge material category – Dropdown

Knowledge material source – Dropdown

Language – free text

Knowledge material vertical – This will be a drop down of list of values. Possible values of file type will be –

- a. FNHW
- b. IBCB
- c. Farm livelihood
- d. Non-Farm
- e. Text document
- f. FI
- g. Others

File type – List of values for file type will be –

- a. Pdf
- b. PowerPoint presentation
- c. Word document
- d. Spreadsheet document
- e. Text document
- f. Bitmap file
- g. Jpeg file
- h. Video file
- i. Audio file

Approver name – free text

Approver designation – free text

Tag – free text

Average user rating

After the search, a grid of search result will be displayed on the screen. Search result will be paginated with 10 records displayed on each page. User can click on the forward and backward buttons to navigate between the pages.

User can download one material at a time if that is a physical file and will be able to play if it is a video link or audio link. On clicking the individual knowledge material, a details screen for the knowledge material will open.

Knowledge material details screen

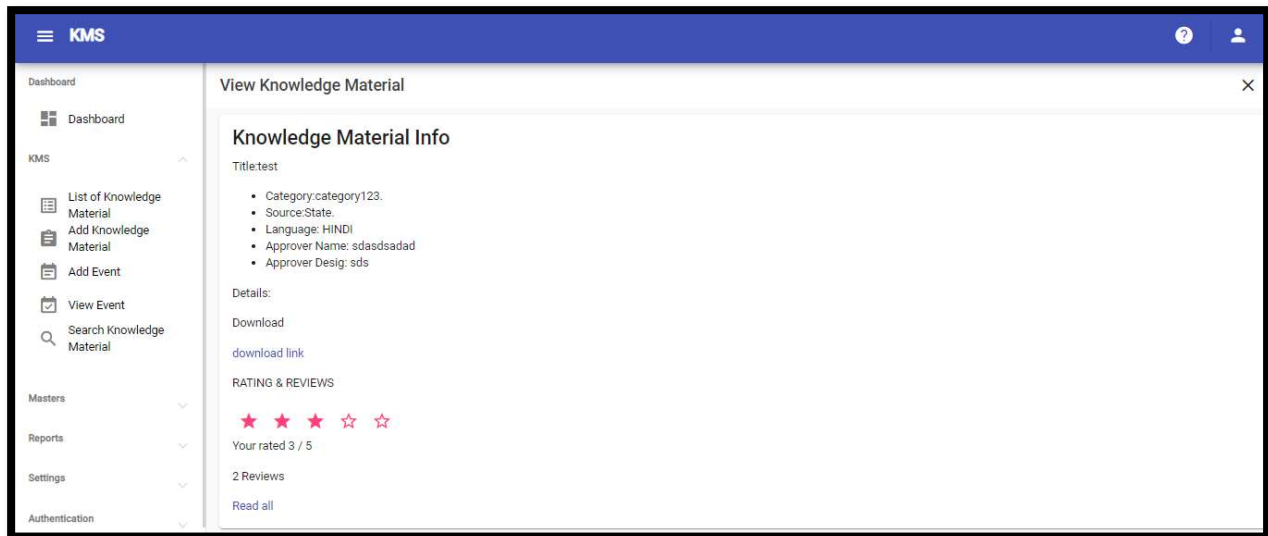
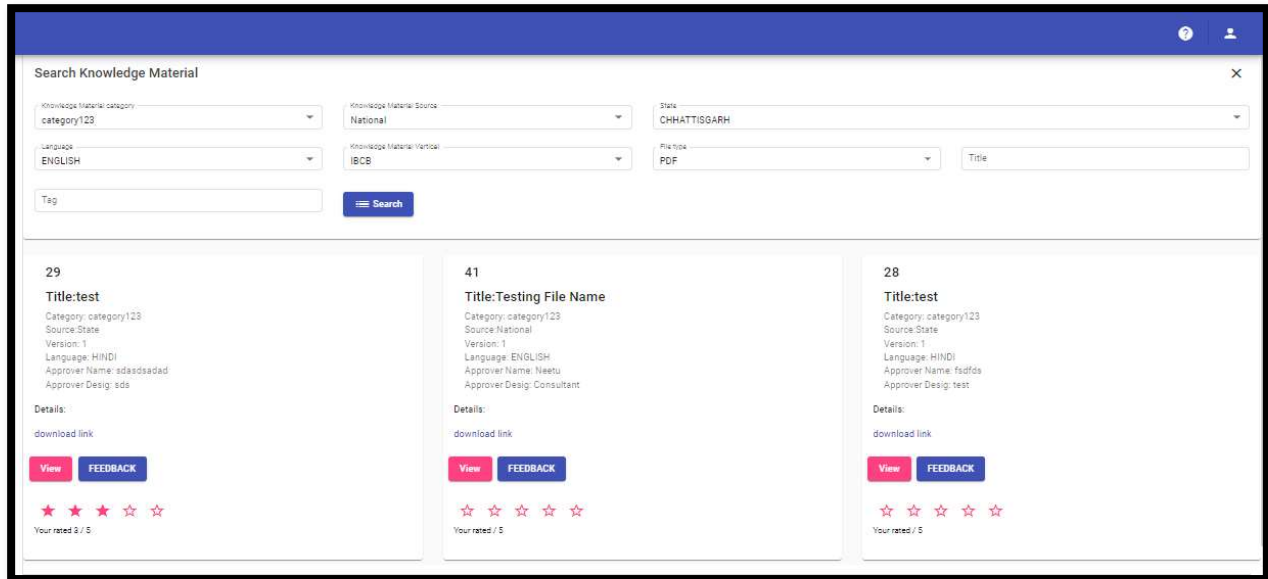
Once clicked on a particular knowledge material, a detail screen will open. Details screen will have following fields –

- a) File name
- b) Knowledge material category
- c) Knowledge material source
- d) Language
- e) Version
- f) Last upload date
- g) Knowledge material vertical
- h) File type
- i) Contributor name
- j) Contributor state
- k) Approver name
- l) Approver designation
- m) Tag
- n) Average user rating
- o) Feedback comments
- p) Download link

Availability of data against the above fields will be subject to the data entered during upload process.

User can download it by clicking the download link if that is a physical file and will be able to play if it is a video link or audio link.

The screenshot displays the KMS (Knowledge Management System) interface. The top navigation bar is blue with the KMS logo on the left and a user profile icon on the right. The left sidebar contains a menu with the following items: Dashboard, KMS (expanded), List of Knowledge Material, Add Knowledge Material, Add Event, View Event, Search Knowledge Material (highlighted), Masters (expanded), Doc Source, Doc Category, Event Type, and File Type. The main content area is titled "Search Knowledge Material" and features a search form with the following fields: Knowledge Material category, Knowledge Material Source, State, Language, Knowledge Material Vertical, File type, Title, and Tag. A "Search" button is located below the Tag field. The bottom right of the search area shows "Items per page: 3" and "0 of 0".



3.13 Analytical Reporting

This page helps to display the analytical reporting of the knowledge material.

Admin user will be able to download reports in the form of spreadsheet and pdf from the portal. There will be no on-screen data available for the reports.

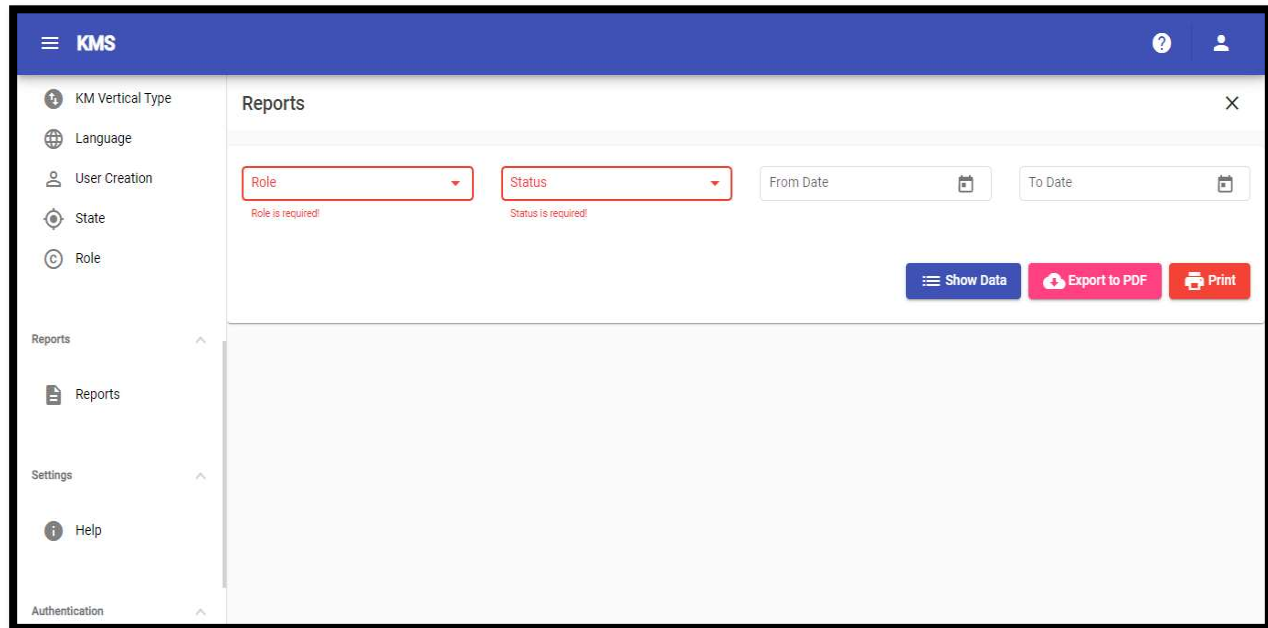
- Knowledge Material Post Status:- This report will provide count status of New Post, Pending Post, Approved Post and Total Post
- List of Knowledge material: - The pre-requisite to generate the report is to select role, status, from date and to date.

There will be three buttons 1) Show data – will display out the details on screen, 2) Export to pdf – will export the report in pdf format 3) Print – will print the report

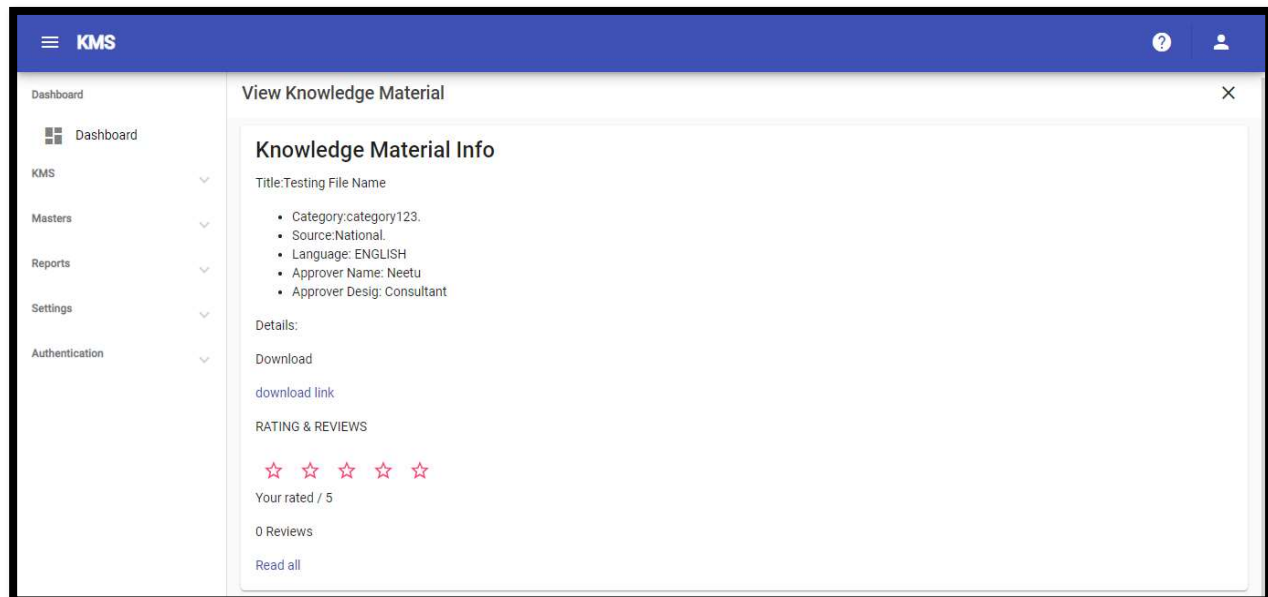
- Day wise Published Knowledge Material in current Month

- b) Category wise Knowledge Material
- c) View Knowledge Material

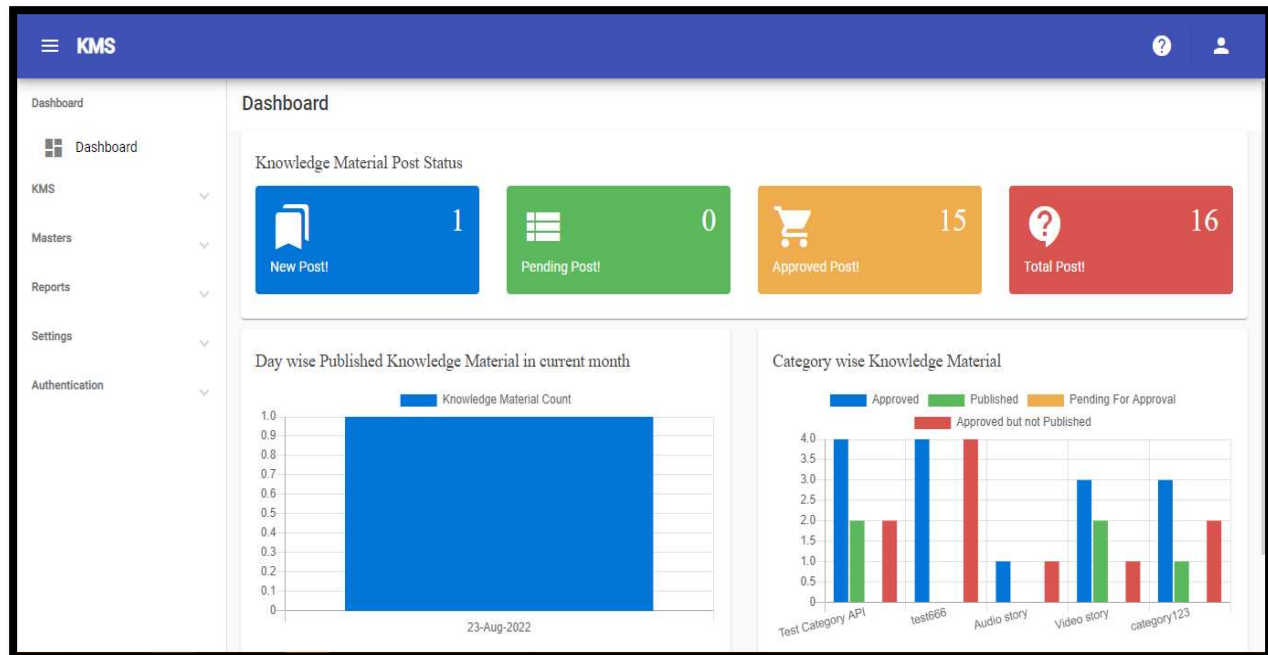
List of Knowledge material



View Knowledge Material



Knowledge Material Post Status, Day wise Published Knowledge Material in current Month and Category wise Knowledge Material.



3.14 Event Creation/ Event View

This page captures the requirement around event upload and view.

Event Creation :-

Admin user will be able to upload events calendar in the form of spreadsheet. Following fields will be uploaded –

- Event name – mandatory
- Event type - mandatory
- Event short description
- Intended audience
- Event venue
- Event start date – mandatory
- Event start time
- Event end time
- Event end date – mandatory
- Event state
- Cross state – Yes/No, mandatory

Once successfully upload, a calendar entry will be created for the event.

Event View:-

Event view is in the calendar format where user can view their event day, week, work week, month and today wise.

Dashboard

KMS

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Add Event

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Masters

Doc Source

Doc Category

Event Type

File Type

Add Event

Event Name *

Event Name is required!

Event Type *

Event Short Description

Event Audience

Event Venue

Event Start Date & time

Event End Date & time

State (Select) *

Cross State Publication *

Save

Close

Dashboard

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Event Type

File Type

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TODAY DAY WEEK WORK WEEK MONTH AGENDA

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	Aug 1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	Sep 1	2	3