

Introduction

The Electronic Records Management System [ERMS] is designed to facilitate the Generation of Reports on scanned documents periodically and track Staff Performance based on users' "numbers"/ departmental records.

ERMS Module

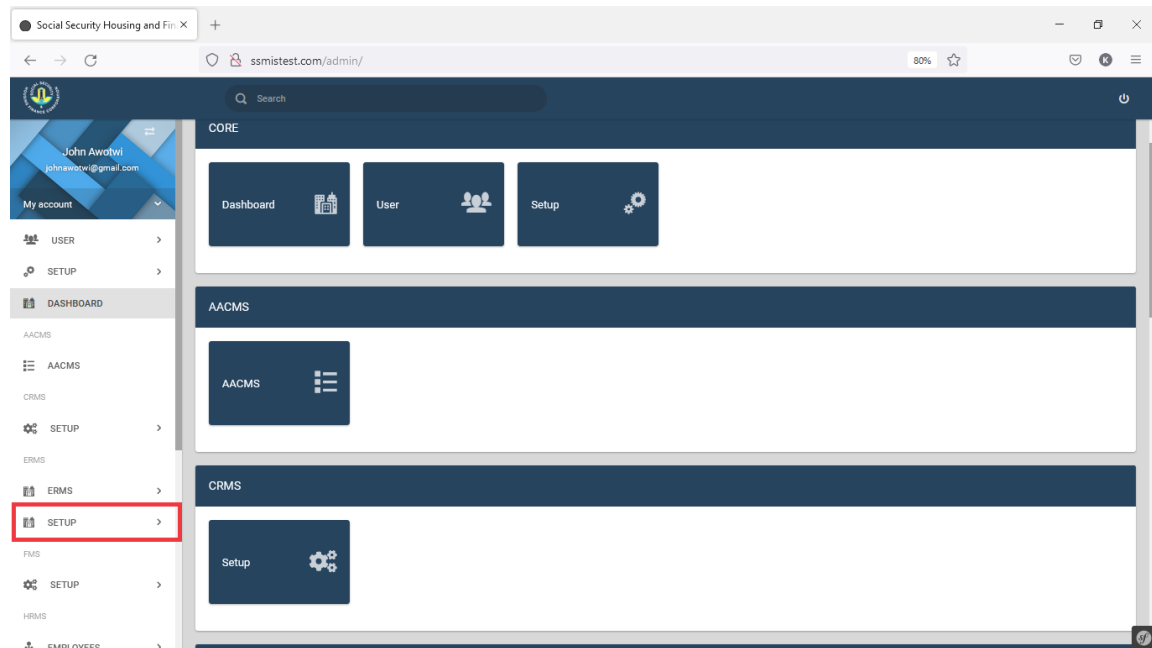
Upon a successful sign-in, a dashboard is displayed as shown in Figure 4. Highlighted in **red**, is the ERMS module.



ERMS Setup Module

The Setup module, seen as **Setup** in the Tab, allows one to create records that will serve as input for completing or submitting a document. See the highlighted

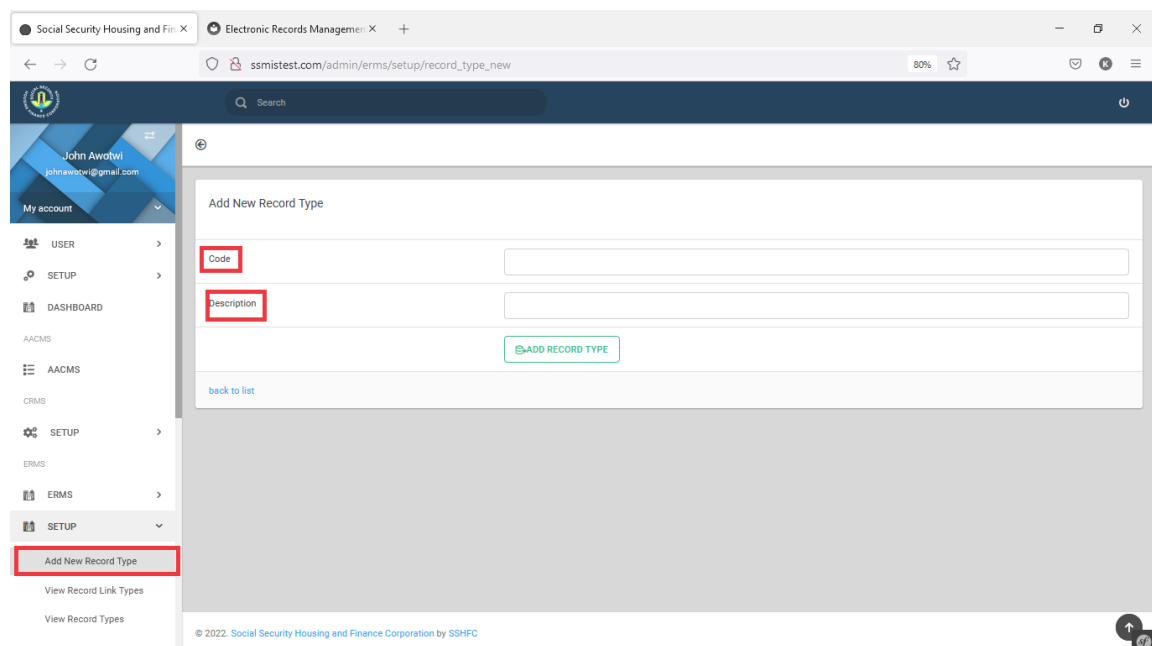
section:



Click the Setup option to reveal a drop-down, this list contains - Add Record - View Record Type - View Record Link Types

Adding a Record




Click the **Add New Record Type** tab button. This presents you with a page that requests for **Code** and **Description** Click on **Add Record Type** to submit an entry.



View Keyword List

To view Keyword Lists, click on the **View keyword List** button. Delete, Update, Show options available for each record.

Keywords List













ID	Keyword	Keyword Description	Created By	Date Created	Actions
1	ORANGE	ORANGE	1	2022-03-19	  

[CREATE NEW](#) [VIEW NEW RECORD LINK](#) [VIEW NEW RECORD TYPE](#)

View Record Link List

To view Record Link Lists, click on the **View Record Link List** button. Delete, Update, Show options available for each record.

Record Link List

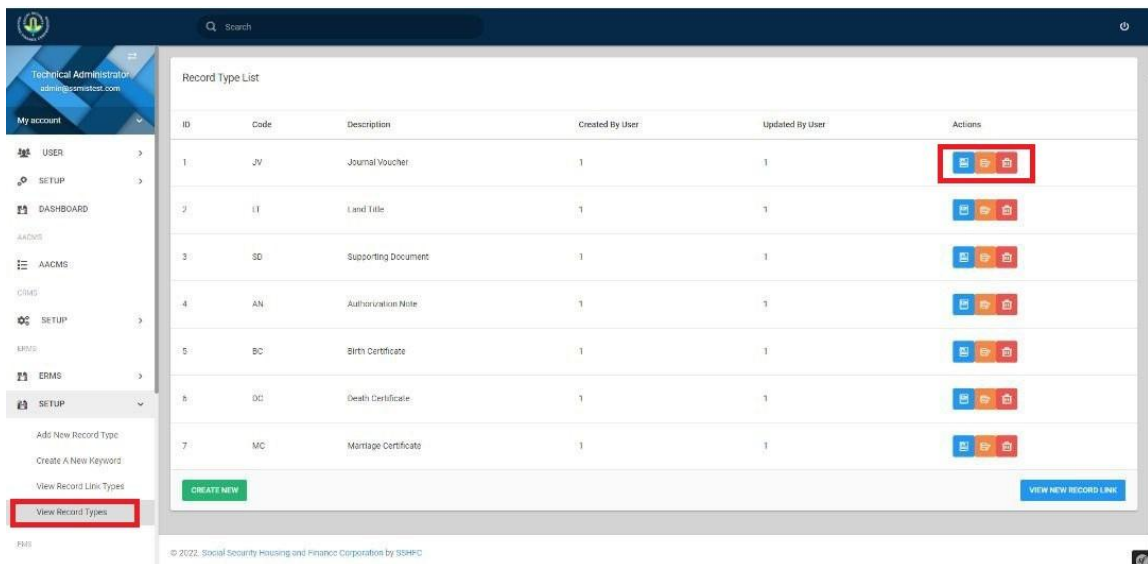
ID	Code	Description	Created By User	Updated By User	Actions
1	MMS	MEMBER MANAGEMENT SYSTEM	1	1	  
2	HRMS	HUMAN RESOURCE MANAGEMENT SYSTEM	1	1	  
3	SSMS	SOCIAL SECURITY MANAGEMENT SYSTEM	1	1	  
4	FMS	FINANCIAL MANAGEMENT SYSTEM	1	1	  

[CREATE NEW](#) [VIEW NEW RECORD LINK](#)

[Add New Record Type](#)
[Create A New Keyword](#)
[View Record Link Types](#)
[View Record Types](#)

View Record Type List

To view the Record Type List, click on the **View Record Type List** button. Delete, Update, Show options available for each record.



Document Upload

Fill in details of confidentiality, the title of the document, description, record type & link, author, keywords, document tag and any attachments needed to be added.

To upload a document, click on the **ERMS** button. This should display a dropdown, on which you will find **Upload a Document**. See the image below:



Upon clicking the **Upload a Document** button, the page below is displayed, allowing you to enter details of the document to be uploaded.

You are also given the option to select multiple documents to be uploaded. Each document [PDF] is allowed a maximum size of Ten (10) Megabytes.

Allowed filetype is the PDF.

ERMS

Upload Documents

• Confidential ☒ YES

• Title

• Description

• Record Type

• Record Link

Hold the CTRL key and click to select options

• Author

• Keywords

• Document Tag

Choose a PDF file to upload not more than 10MB

Update Records

View uploaded data using the “View uploaded data” or “View uploaded data (confidential)” tab on the left panel. You can now view all entries with their respective descriptions by filtering. To update or delete these document entries, you can use the update or delete buttons to the right of each record, or click on the record's Electronic ID. See images below:

Showing the ERMS view uploaded Document tab

ssmistest.com/admin/erms/record/list

67%

John Awahyi
johnawahyi@gmail.com

My account

USER

SETUP

DASHBOARD

AACMS

CRMS

ERMS

Document Access History

Search For Uploaded Documents

Upload Document

View Uploaded Documents

View Uploaded Documents (Confidential)

SETUP

ERMS





Uploaded Documents

Click on the Electronic ID to view details about the upload. Uploaded Confidential documents can only be seen in list when given access.

Filter: Type to filter...

Show: 10

COPY EXCEL CSV PDF

Electronic ID	Confidential	Author	Title	Record Type	Description	Keywords	Document Tag	Action
1003	NO	JAMES BROWN	CONTRIBUTIONS2022	MS WORD STANDARDS	NOTHING HERE	SSNIT	SSNIT	   

Showing 1 to 1 of 1 entries

1

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ssmistest.com/admin/erms/record/list

67%

John Awahyi
johnawahyi@gmail.com

My account

USER

SETUP

DASHBOARD

AACMS

CRMS

ERMS

Document Access History

Search For Uploaded Documents

Upload Document

View Uploaded Documents

View Uploaded Documents (Confidential)

SETUP

ERMS





Uploaded Documents

Click on the Electronic ID to view details about the upload. Uploaded Confidential documents can only be seen in list when given access.

Filter: Type to filter...

Show: 10

COPY EXCEL CSV PDF

Electronic ID	Confidential	Author	Title	Record Type	Description	Keywords	Document Tag	Action
1003	NO	JAMES BROWN	CONTRIBUTIONS2022	MS WORD STANDARDS	NOTHING HERE	SSNIT	SSNIT	   

Showing 1 to 1 of 1 entries

1

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Showing the ERMS view uploaded Document tab confidential

ssmistest.com/admin/erms/record/all

67%

John Awotwi
johnawotwi@gmail.com

My account

USER

SETUP

DASHBOARD

AACMS

CRM

SETUP

ERMS

Document Access History

Search For Uploaded Documents

Upload Document

View Uploaded Documents

View Uploaded Documents (Confidential)

SETUP

ERMS

















Updated Documents

Click on the Electronic ID to view details about the upload. Uploaded Confidential documents can only be seen in list when given access.

Filter: Type to filter...

Show: 10

COPY EXCEL CSV PDF

Electronic ID	Confidential	Author	Title	Record Type	Description	Keywords	Document Tag	Action
1000	YES	CHARLES DICKENS	A TALE OF TWO CITIES	DESCRIBING PDF'S	A TALE ABOUT TWO CITIES	CITY, TWO, CHARLES	DOCUMENT	   
1001	YES	KWEKU ANANSE	A STITCH IN TIME	DESCRIBING PDF'S	DOCUMENT ABOUT STICHES IN GOVERNMENT	GOVERNEMENT	PDF	   
1002	YES	JAMES BROWN	1985	DESCRIBING PDF'S	A BOOK ABOUT THE MOST INSIGNIFICANT YEAR EVER	YEARS	NONE	   
1003	NO	JAMES BROWN	CONTRIBUTIONS2022	MS WORD STANDARDS	NOTHING HERE	SSNIT	SSNIT	   

Showing 1 to 4 of 4 entries

1

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ssmistest.com/admin/erms/record/all

67%

John Awotwi
johnawotwi@gmail.com

My account

USER

SETUP

DASHBOARD

AACMS

CRM

SETUP

ERMS

Document Access History

Search For Uploaded Documents

Upload Document

View Uploaded Documents

View Uploaded Documents (Confidential)

SETUP

ERMS

















Updated Documents

Click on the Electronic ID to view details about the upload. Uploaded Confidential documents can only be seen in list when given access.

Filter: Type to filter...

Show: 10

COPY EXCEL CSV PDF

Electronic ID	Confidential	Author	Title	Record Type	Description	Keywords	Document Tag	Action
1000	YES	CHARLES DICKENS	A TALE OF TWO CITIES	DESCRIBING PDF'S	A TALE ABOUT TWO CITIES	CITY, TWO, CHARLES	DOCUMENT	   
1001	YES	KWEKU ANANSE	A STITCH IN TIME	DESCRIBING PDF'S	DOCUMENT ABOUT STICHES IN GOVERNMENT	GOVERNEMENT	PDF	   
1002	YES	JAMES BROWN	1985	DESCRIBING PDF'S	A BOOK ABOUT THE MOST INSIGNIFICANT YEAR EVER	YEARS	NONE	   
1003	NO	JAMES BROWN	CONTRIBUTIONS2022	MS WORD STANDARDS	NOTHING HERE	SSNIT	SSNIT	   

Showing 1 to 4 of 4 entries

1

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Showing update view

ssmistest.com/admin/erms/record/all

67%

John Awotwi
johnawotwi@gmail.com

My account

USER

SETUP

DASHBOARD

AACMS

CRM

SETUP

ERMS

Document Access History

Search For Uploaded Documents

Upload Document

View Uploaded Documents

View Uploaded Documents (Confidential)

SETUP

ERMS

Update Uploaded Document

Confidential

YES

Select a new value if you are updating

YES

Title

A TALE OF TWO CITIES

Description

A TALE ABOUT TWO CITIES

Record Type

DESCRIBING PDF'S

Select main entry if you are updating

PDFS

Select main entry if you are updating

PDFS

Record Link

PDFS

Hold the CTRL key and click to select options

Author

CHARLES DICKENS

Keywords

CITY, TWO, CHARLES

Document Tag

DOCUMENT

To Keep uploaded file, select it

☐ 1423552411039-0785240324039-ang.pdf

☐ 9423552411039-0785240324039-ang.pdf

☒ Add a file

Choose a file to upload not more than 10MB

UPDATE

When the **Update button** or **Electronic ID** is clicked, The update view is displayed to allow updates for the particular document uploaded. Click **Update** when you are done with editing.

Search Records

To search for an uploaded document, you click on the **Search for Uploaded Document** tab. This opens a view allowing you to search for a document, using any of its details including and not limited to: *Electronic ID* , *Description* , *Record Type*, *Keywords*, *Title* etc.

Below is an image that shows a search using the "Author" and the results displayed.

ERMS

Search For Uploaded Documents

Electronic ID: Description: Title:

Record Type: Record Link: Author:

Keywords: Document Tag:

SEARCH

Electronic ID	Record Link	Author	Title	Record Type	Description	Keywords	Document Tag	Created By User	Action
1002	PDF01:	JAMES BROWN	1985	DESCRIBING PDFS	A BOOK ABOUT THE MOST INSIGNIFICANT YEAR EVER	YEARS	NONE	22	View Details
1003	PDF01:	JAMES BROWN	CONTRIBUTIONS2022	MS WORD STANDARDS	NOTHING HERE	SSNIT	SSNIT	22	View Details

Document Access History

The ERMS module also allows you to track the access history of documents. Who accessed the document, when it was accessed. Below is an image that demonstrates the use of the Document Access History Tab.

uat.ssmistest.com/admin/erms/record/access_history

Documents Access History

Filter: Type to filter...

Show: 10

COPY EXCEL CSV PDF

Electronic ID	Action	User ID	Username	Module	Date Accessed	Time Accessed	Action
1001	VIEW	28	Ernest Konadu	PDF01	23-03-2022	12:26:37	DETAILS
1001	VIEW	28	Ernest Konadu	PDF01	23-03-2022	18:47:59	DETAILS
1003	UPDATE	22	John Awotwi	PDF01	17-03-2022	15:45:06	DETAILS
1003	UPDATE	20	ERMS Test	PDF01	20-03-2022	20:24:40	DETAILS
1003	VIEW	25	michael wilson	PDF01	23-03-2022	13:36:20	DETAILS
1003	UPDATE	25	michael wilson	PDF01	23-03-2022	13:41:55	DETAILS
1003	UPDATE	22	John Awotwi	PDF01	11-04-2022	12:33:35	DETAILS
1005	DELETE	28	Ernest Konadu	PDF01	23-03-2022	12:20:19	Deleted
1006	VIEW	28	Ernest Konadu	PDF01	23-03-2022	12:26:21	DETAILS
1006	VIEW	28	Ernest Konadu	PDF01	23-03-2022	18:48:30	DETAILS

Showing 1 to 10 of 14 entries

1 2

Below is an image that shows the detailed view of the documents acces history when clicked.

uat.ssmistest.com/admin/erms/record/view_file/1003

ERMS

Uploaded Documents Details

Confidential Status	NO		
Electronic ID	1003	Record Link	PDF01
Author	JAMES BROWN	Title	CONTRIBUTIONS2022
Document Name	6235734b7c22-9789240024250-eng.pdf 623b2a3bcb9f-Social Security Housing and Finance Corporation.pdf		
Description	SOMETHING HERE	Keywords	SS EDMS ERMS
Document Tag	SSN	Record Type	MS WORD STANDARDS
Date of First Entry	17-03-2022	Date of Last Entry	11-04-2022
Created By	22	Updated By	22
Last Access Time	12:33:35	Has Multiple Record Links	NO