

Document Management System

**User
Documentation**



Rastriya Banijya Bank

For Maker User

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User Login

Note: Maker User Is Only Created By Admin, Super Admin

This is First page you see once you start Document Management System. Here you enter secured credentials to access Document Management System.

1. Enter the valid “Username” and “Password”
2. Click the “Login” button to verify the email and password.

This Is the login Screen of Document Management System

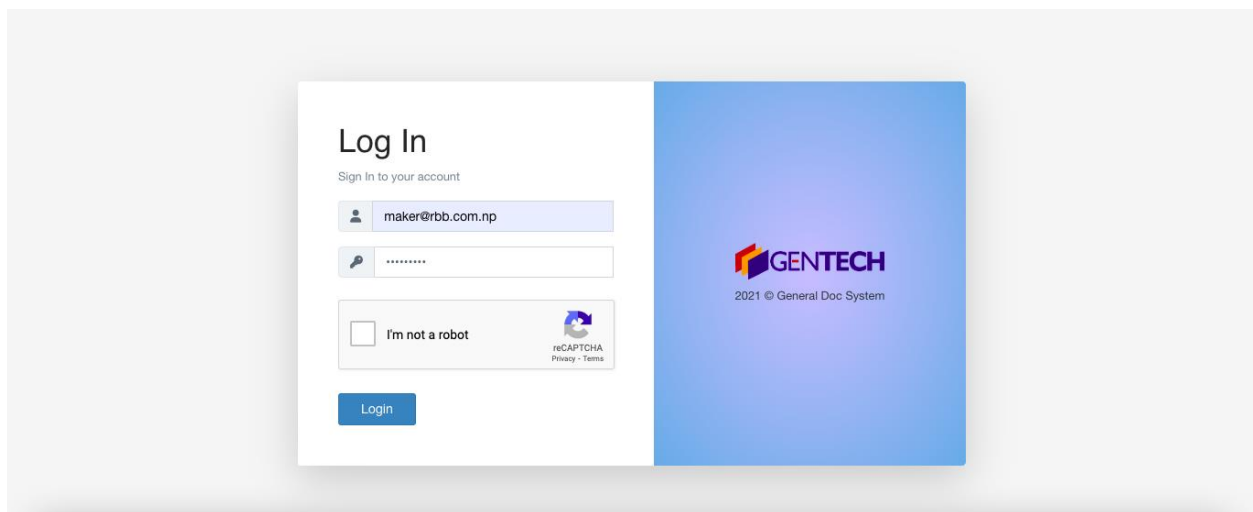
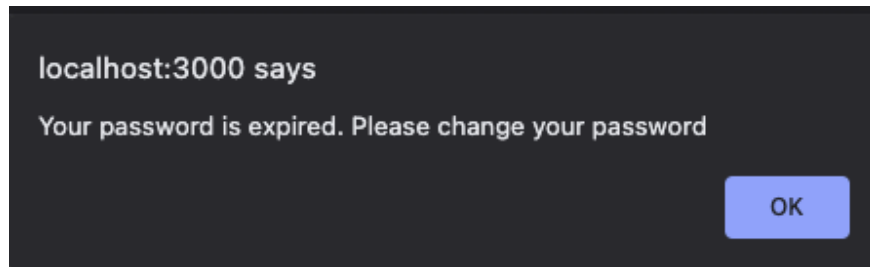


Figure 1 User Login

In This page you see input box and login button. You have to enter your Valid Credential to Access System. Once the credential is verified You will Redirected To Document Management System (DMS) Dashboard.

Note: For the First-Time login by Maker, it will say password expired Click OK and change password



Once You Click Ok. You can change new password

A light gray form titled "Please reset your password." with a sub-header "Change Password" preceded by a gear icon. It contains three input fields: "Old Password *", "New Password *", and "Confirm Password *", each with a placeholder text matching the label. Below these fields is a checkbox labeled "Show Password". At the bottom right of the form are two buttons: a blue "Cancel" button and a green "Submit" button.

Figure 2 Password change

Note Old Password is assigned by Admin User Who Manages User Account

Dashboard

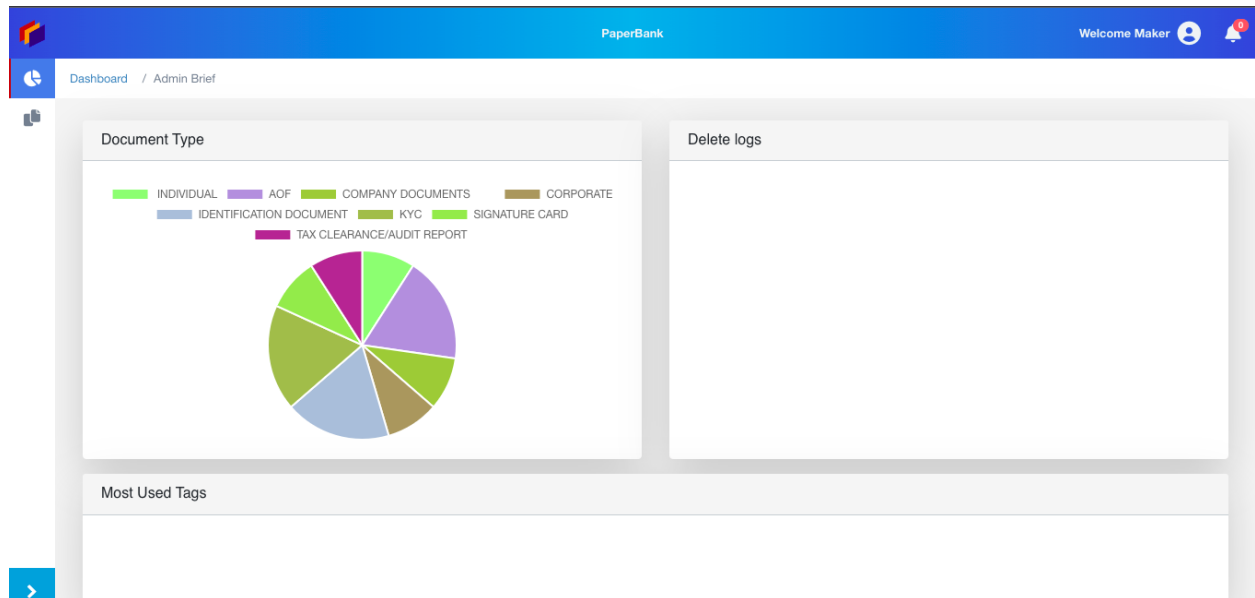


Figure 3 User Dashboard

In the dashboard, the user can view the quick information regarding “Document Types”, “Delete Logs” of the document, “Document tags” and the information regarding the “Total Document”. You can Scroll page to view more information.

- Document Types Information is shown in Pie Chart.
- Total Document Information is shown in Bar Graph.

If you hover your mouse pointer on the icons on the left side menu you can see feature list as shown in the picture.

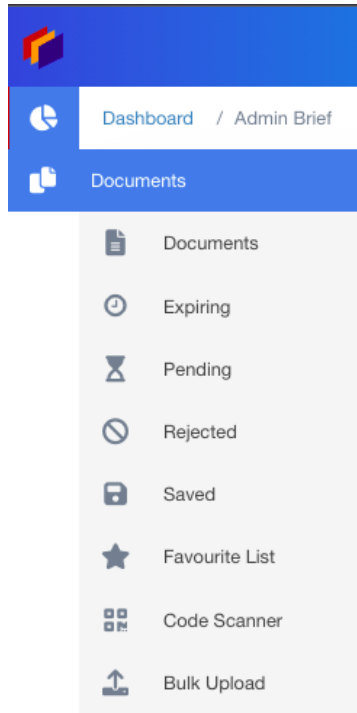

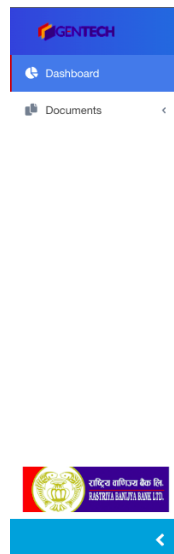


Figure 4 Side Bar Menu

If you click.  Arrow button at bottom left then you can expand all the Document Management System Features list.
Here you See two Section



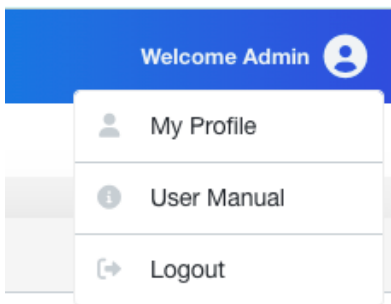
Click on the Desired Section to Expand the Features List

Menu Bar



It is top section of DMS system. It contains logo on left , 'PaperBank' Title on middle, user name and notification icon on the right.

User: It shows maker username. If you click the user icon on the left side you see My profile, User Manual, Logout



My Profile:

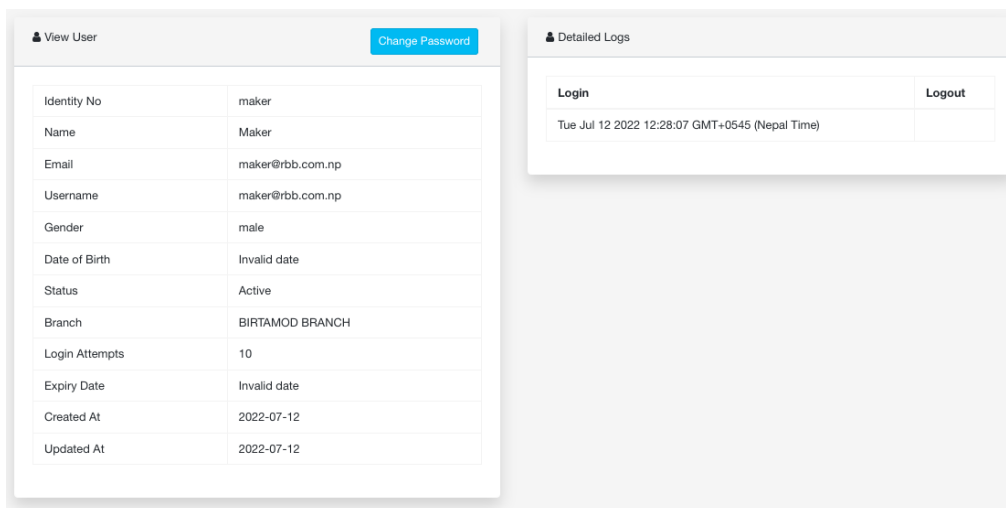


Figure 5 My profile Section

You can View User Info You can change password.

You can See the detailed information of logging time and date.

User Manual: for documentation and **Logout:** to logout of DMS system or to switch user.

Notification:

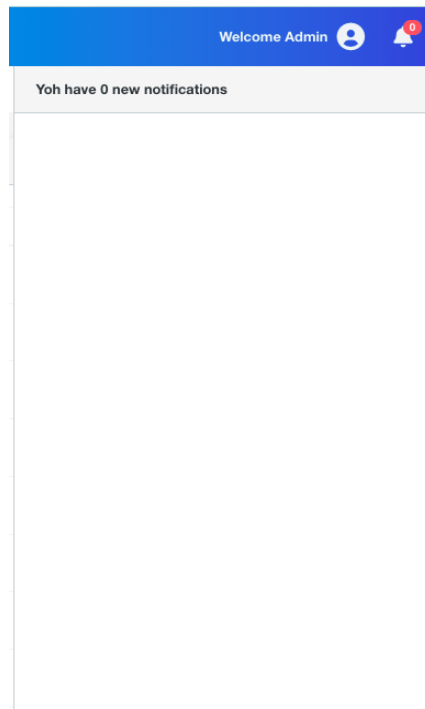


Figure 6 Notification Panel

Notification section on Maker shows the document is pending for approval. User can click the notification to access the document.

Documents Section

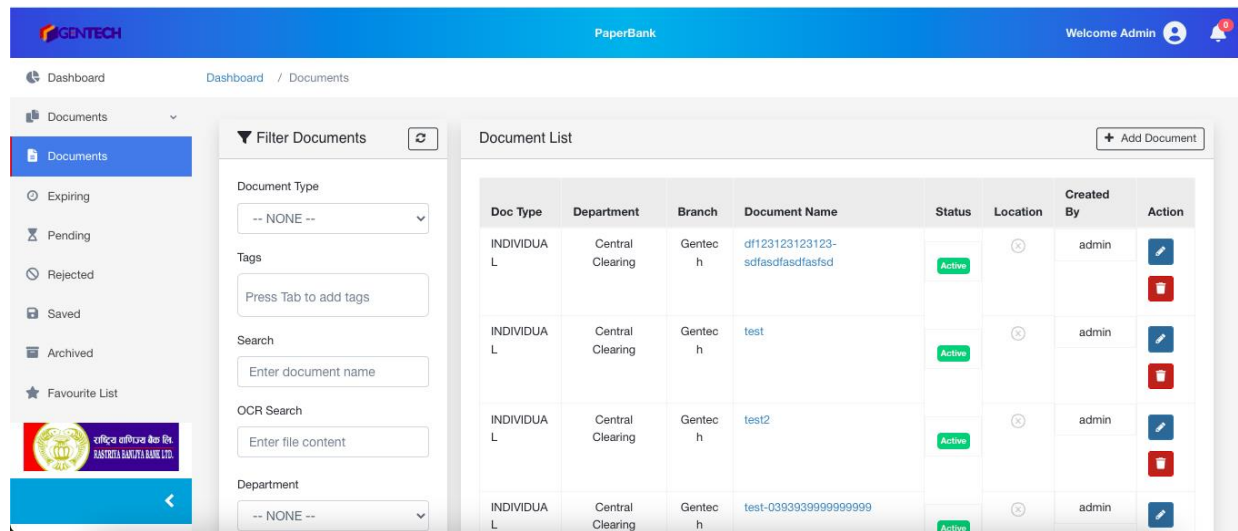


Figure 7 Document List and Creation

In Documents Section you see Two Section

- Filter Documents
- Document List

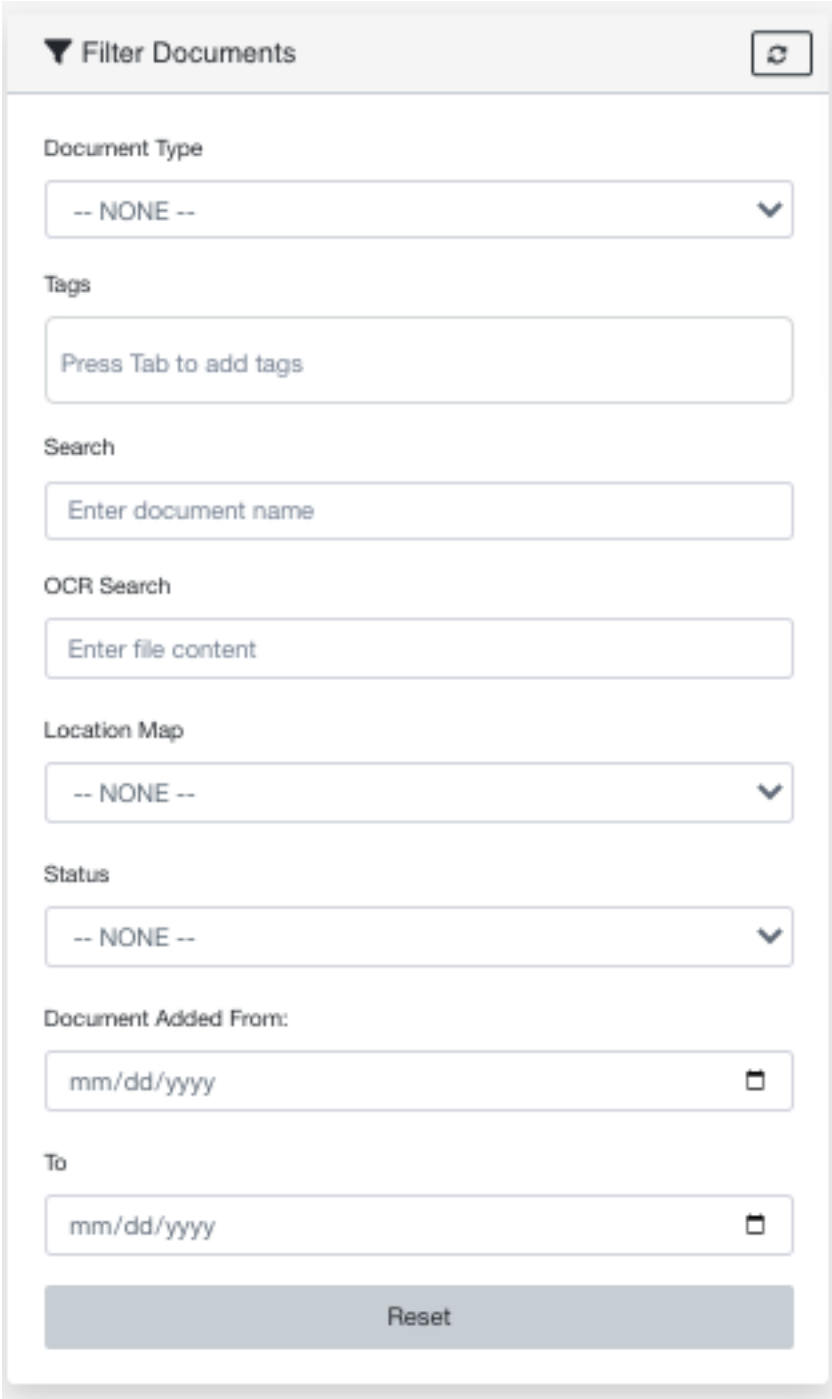
Filter Documents

Filter Document section is used to quick search or filter document for quickly finding desired Documents. User can be filtered documents in various ways

- Filter by Document Type. Select the document type from the “Document Type” dropdown to filter.
- Tags.
 - ➔ Search by document name by entering “Tags” in the search box. You can press tab to add multiple tags.
- Search
 - ➔ Search by document name by entering “Document Name” in the search box.
- OCR Search
 - ➔ It is a quick OCR search that searches through documents and images.
- Filter by Location Map
 - ➔ Select the location map from the “Location Map” dropdown to filter.
- Filter by Status
 - ➔ Select the status from the “Status” dropdown to filter.

- Filter by Date
 - ➔ Select “Document added from” date.
 - ➔ Select “Document end date” to filter the document around that date.

Click on Reset Button If you want to reset the Filter.

A screenshot of a web application's 'Filter Documents' form. The form is titled 'Filter Documents' with a funnel icon and a reset button (circular arrow) in the top right corner. It contains several filter fields: 'Document Type' (dropdown menu with '-- NONE --'), 'Tags' (text input with placeholder 'Press Tab to add tags'), 'Search' (text input with placeholder 'Enter document name'), 'OCR Search' (text input with placeholder 'Enter file content'), 'Location Map' (dropdown menu with '-- NONE --'), 'Status' (dropdown menu with '-- NONE --'), 'Document Added From:' (date input with placeholder 'mm/dd/yyyy' and a calendar icon), and 'To' (date input with placeholder 'mm/dd/yyyy' and a calendar icon). At the bottom is a large grey 'Reset' button.

Filter Documents

Document Type

-- NONE --

Tags

Press Tab to add tags

Search

Enter document name

OCR Search

Enter file content

Location Map

-- NONE --

Status

-- NONE --

Document Added From:

mm/dd/yyyy

To

mm/dd/yyyy

Reset

Figure 8 Document Search

Documents list

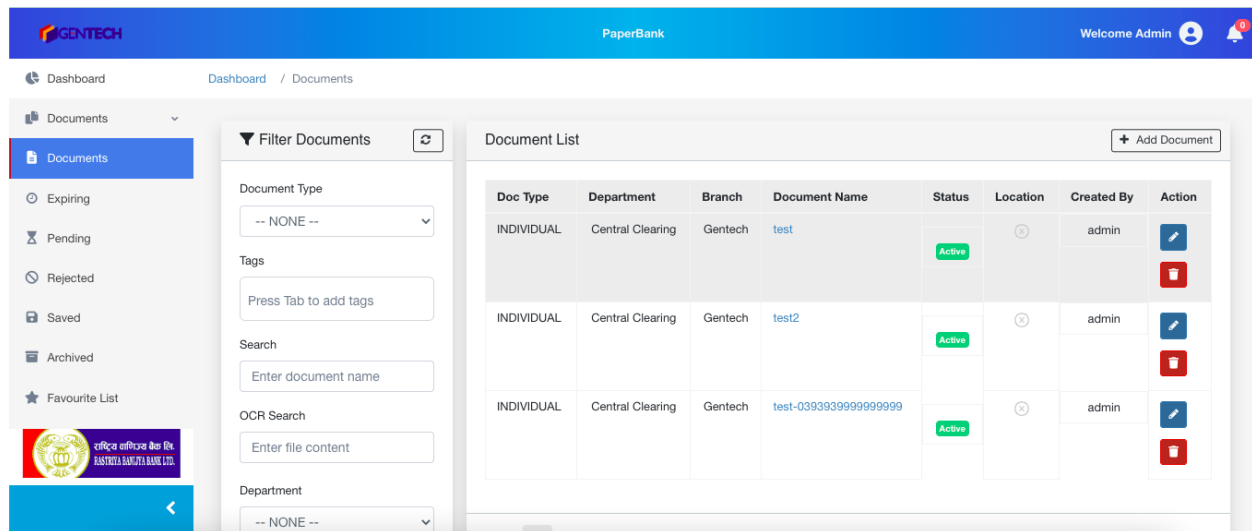
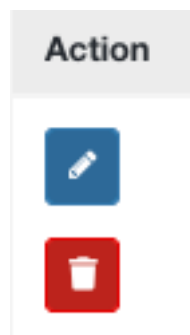


Figure 9 Document List

This page shows list of Documents created. This page shows doc type, Department where document is assigned, branch of document, Document Name, Status of document, location, created by and action. User can click Document Name of file to preview file.

Actions of Documents



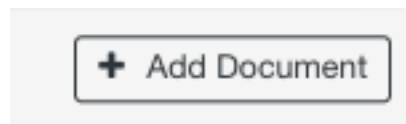
These are action buttons on the right side. The main purpose of Pencil icon blue button is to edit the document. The main purpose of trash-can icon is to delete the document.

Add Document

| Document List | | | | | | | |
|---------------|------------------|---------|---------------------------------------|--------|------------------|------------|------------------------------------------------|
| | | | | | | | |
| Doc Type | Department | Branch | Document Name | Status | Location | Created By | Action |
| AOF | Central Clearing | Gentech | rbbcdocument2 | Active | AMARAPURI BRANCH | admin | Edit Delete |
| INDIVIDUAL | Central Clearing | Gentech | test | Active | ⊗ | admin | Edit Delete |
| INDIVIDUAL | Central Clearing | Gentech | test2 | Active | ⊗ | admin | Edit Delete |
| INDIVIDUAL | Central Clearing | Gentech | test-0393939999999999 | Active | ⊗ | admin | Edit Delete |

Figure 10 Document Creation

To create a document user have to click Add Document button on top right of document list section.



Click on Add Document to go to Document Creation Container. Once you click add document button you will redirect to Document creation Container as show in the Picture.

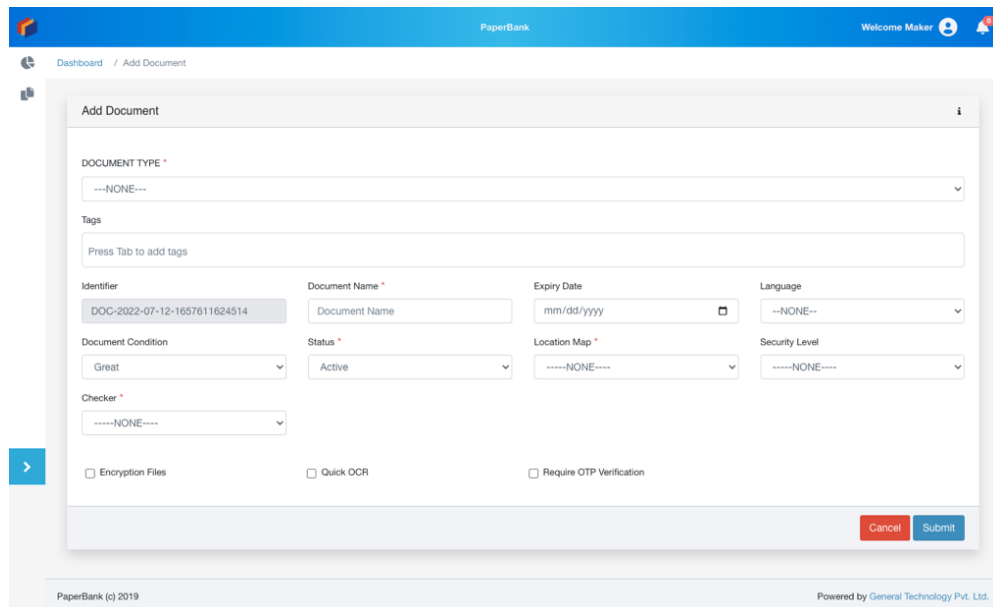

A screenshot of the "Add Document" form in the PaperBank application. The form is titled "Add Document" and has a close button (X) in the top right corner. It contains several sections: "DOCUMENT TYPE" with a dropdown menu showing "--NONE--"; "Tags" with a text input field and a "Press Tab to add tags" prompt; "Identifier" with a text input field containing "DOC-2022-07-12-1657611624514"; "Document Name" with a text input field containing "Document Name"; "Expiry Date" with a text input field containing "mm/dd/yyyy" and a calendar icon; "Language" with a dropdown menu showing "--NONE--"; "Document Condition" with a dropdown menu showing "Great"; "Status" with a dropdown menu showing "Active"; "Location Map" with a dropdown menu showing "----NONE----"; "Security Level" with a dropdown menu showing "----NONE----"; "Checker" with a dropdown menu showing "----NONE----"; and three checkboxes: "Encryption Files", "Quick OCR", and "Require OTP Verification". At the bottom right, there are "Cancel" and "Submit" buttons. The footer of the application shows "PaperBank (c) 2019" and "Powered by General Technology Pvt. Ltd.".

Figure 11 Document Indexing

Fields of Document Creation

- **DOCUMENT TYPE:-** It is drop down where you select the type of document and input the Data if necessary. The fields in document type are dynamic user can create desired input fields
- **Tags:** You can create Tags for Document. You can create multiple tags by pressing tab. Tags can be used to find document quickly.
- **Identifier:** They are document identifier they are generated automatically.
- **Document Name:** Enter you Desired Document Name for creation. It is required field
- **Expiry Date:** You can add expiry date for document to expire. It is not compulsory Section. Once document is expired it moved to archived section.
- **Language:** You can select language of document
- **Document Condition:** You can select document condition from dropdown whether the physical document is great, good, poor, torn.
- **Status:** You can select status of document from dropdown whether the physical document is active, checked out or suspended. It is required Field
- **Location Map:** You can select location map of physical document present on certain location from dropdown. It is required field.
- **Security Level:** Level of security given to document. It is optional Field
 - **NONE** – It is a default so no security is assigned.
 - **Low** - If is set to low all users can view document
 - **Medium**- Only Selected Department Can view document
 - **High**- If is set to high only specified user can view document. If you select high new field is visible where you can assign users

User Access *

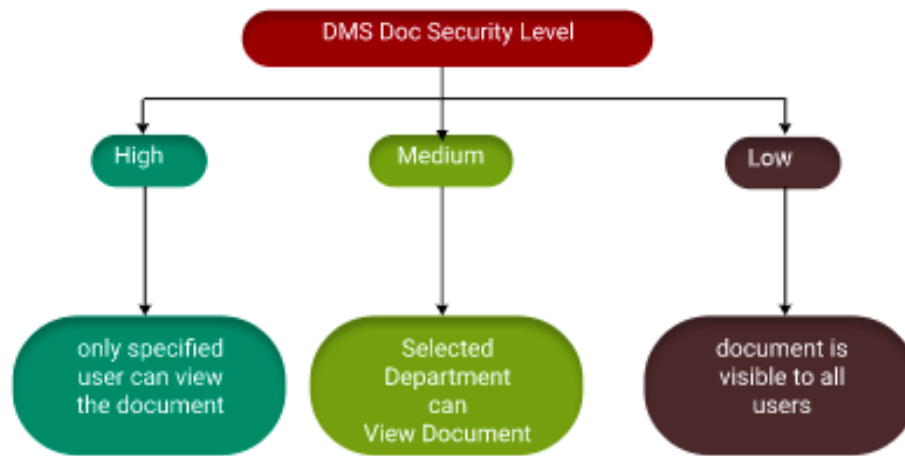


Figure 12 Security Level

- Checker: Select Checker From the list. ****Very Important Field****

☐ Encryption Files

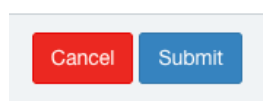
☐ Quick OCR

☐ Require OTP Verification

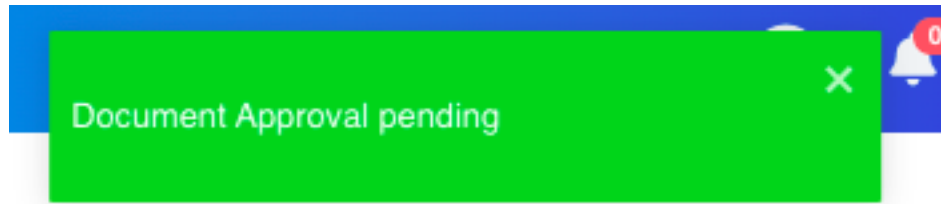
This are optional field

- Encryption Files: You can encrypt document for security purpose
- Quick OCR: You can enable Quick OCR for ocr search in filter section.
- Require OPT Verification: You can provide Require opt verification for document.

Once the desired field is filed up click on submit button to create document or cancel if you want to cancel the document.



Once the document is submitted it will show the following message.



You will be directed to document upload Section

PaperBank

Welcome Admin

Dashboard / View Document

Document Information

View QR

Document Type: INDIVIDUAL

Identifier: DOC-2022-07-11-1657518363346

Feature: No feature available

Document Name: test-34344343434344

Created By: Admin

Security Hierarchy: Super-001

Approval: Not Approved

Archived: Not Archived

Department: Central Clearing

Status: Active

Location Map: AMARAPURI BRANCH

Created: Monday, July 11th 2022

Modified: Monday, July 11th 2022

Tags: [This link is pending](#)

☐ Add to Favourite List

☐ Archived Now

Preview File

Please select document form Dropdown.

Attachments

Search by name column

| Name | Created By | Document Type | Indexes | Upload Date | Actions |
|---------------------------------------------------------------------------|------------|---------------|---------|-------------|---------|
| <div>Choose a file...</div> <div><div>Browse</div><div>Upload</div></div> | | | | | |

Send Document to Checker

Send to Checker

Send To Checker with Review

Audit Logs

Checkout Logs

Document Access Logs

| Access Type | Type | Date | Time | Accessed By |
|----------------------------|------|------|------|-------------|
| <div>Download Report</div> | | | | |

PaperBank (c) 2019

Powered by General Technology Pvt. Ltd.

Figure 13 document Upload Section

Document information

Document Information

View QR

| | |
|--------------------|------------------------------|
| Document Type | INDIVIDUAL > AOF |
| Identifier | DOC-2022-07-12-1657611624514 |
| Feature | No feature available |
| Document Name | MakerDocument |
| Created By | Maker |
| Security Hierarchy | Branch_18 |
| Approval | <div>✖ Not Approved</div> |
| Archived | <div>🚫 Not Archived</div> |
| Branch | BIRTAMOD BRANCH |
| Status | Active |
| Location Map | AMARABURI BRANCH |

Figure 14 Document Information

It will show information of document you have create. You can edit document using pencil button and delete document from recycle bin button

- You can view QR using View QR button.
- You can view whether document is approved or not, archived or not, Status, created and modified date.

☐ Add to Favourite List ★

☐ Archived Now 📁

You can add document to favourite list and archived document now.

Preview File

You can preview the document you have uploaded (see attachment section on how to upload document).

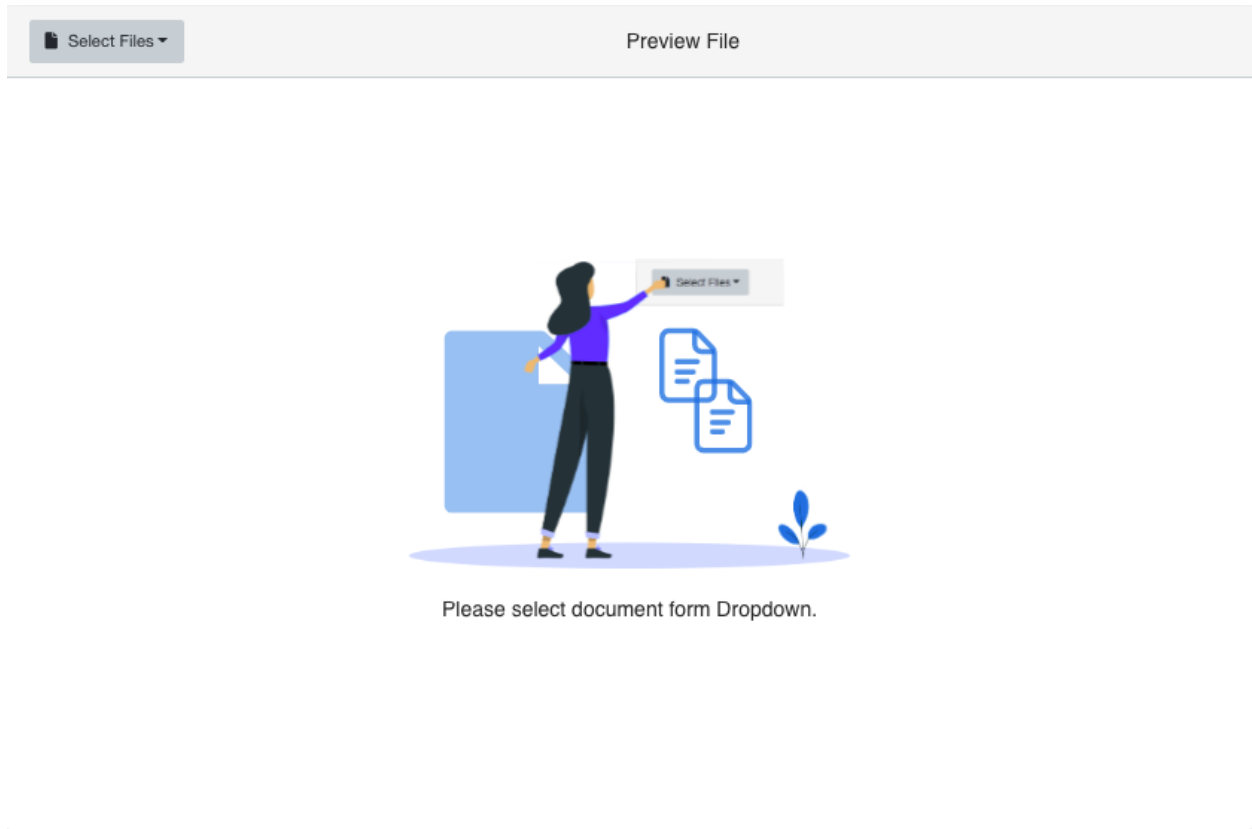
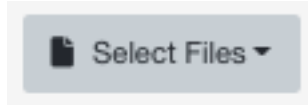


Figure 15 Document Preview

Note: Select Files button on top left is only visible once you upload document. Click on Select Files button and select the desired uploaded document to preview them.



Logs

Checkout logs:

- Document that is returned can be seen in this tab.

The screenshot shows a web interface with a tab labeled "Checkout Logs". Below the tab is a yellow header bar with the text "Checkout information". Underneath is a table with the following columns: "Name", "Checkout Date", "CheckIn Date", "Description", and "Status". The table is currently empty.

Figure 16 checkout Log List

Hourly Access

The screenshot shows a web interface with two tabs: "Checkout Logs" and "Hourly Access". The "Hourly Access" tab is active. It contains a form titled "Provide Hourly Access" with the following fields: "Select Attachment" (a dropdown menu with "Select..." as the placeholder), "Duration" (a text input field with "1" as the value), "Duration Type" (a dropdown menu with "Minute" as the selected value), and "Check Users" (two radio buttons labeled "Existing Users" and "Other Users"). A "Submit" button is at the bottom right of the form. To the right of the form is a table titled "Hourly Access" with two columns: "User" and "URL". The table is currently empty.

Figure 17 Hourly Access Dashboard

Note: [Very Important] Hourly Access section is only accessible only if checker has approved the document. Once the document is approved by checker document will show in the document list of makers. Then clicking on the document name in document list.

The screenshot shows a dropdown menu with the text "Document Name" above it. The dropdown is open, showing a single option: "MakerDocument".

Select the document(s) that you want to give access to from the "Select Attachment" dropdown.

Checkout Logs
Hourly Access

⌚ Provide Hourly Access

Select Attachment *

userManual_rbb_user.pdf
X
v

Duration *

1

Duration Type *

Minute

Check Users

☐ Existing Users
☐ Other Users

Submit

Figure 18 Hourly Access Section

- You can provide hourly access to selected document to existing user on database users outside the system for a certain amount of time.

Check Users

☐ Existing Users
☐ Other Users

- You can provide the duration and duration type in (minute, hour and day)

Duration *
Duration Type *

1

Minute

Hourly Access





| User | URL |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| rupesh@generaltechnology.com.np |   |

Figure 19 Hourly Access URL generation

URL





User can copy the access url by clicking copy button or send email

Attachments

Attachments

Search by name column

| Name | Created By | Document Type | Indexes | Upload Date | Actions |
|-------------------------|------------|---------------|---------|-------------------------|---------------------------------------------------------------------------------------|
| userManual_rbb_user.pdf | Maker | | | Tuesday, July 12th 2022 |  |

< 1 >
 Items Per Page 10 Total Documents :1 Page : 1
 [Download Report](#)

Choose a file...
 [Browse](#)

[Upload](#)

Send Document to Checker
 [Send To Checker](#)

Figure 20 Hourly Access - Attachments

In attachment section you can click browse button to browse and select desired document.

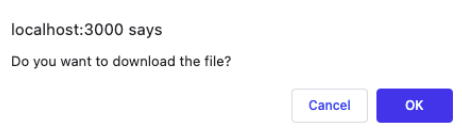
Choose a file...
 [Browse](#)



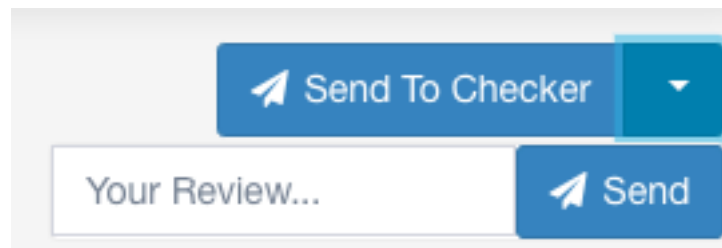
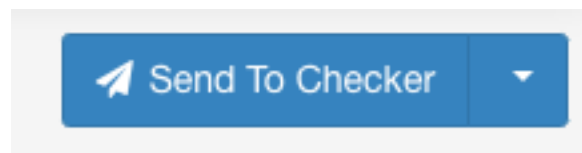
Once document is selected click upload button to upload the document

Note: You can upload multiple documents from here.

Once document is uploaded it will show in the list. You can delete uploaded Document from here. To download the upload document simply click the name of upload file it will prompt to download or cancel the file.

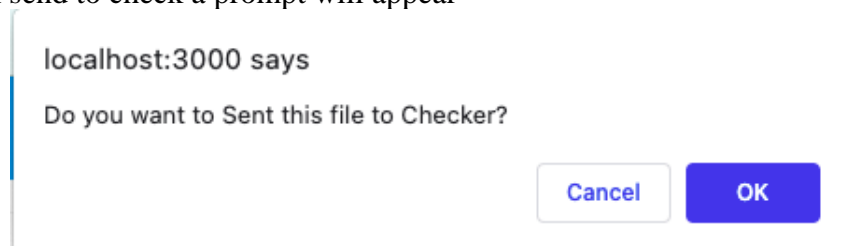


Once the desired document is attached you can send to check for Approval.



You can either click Send to Check button to send the document directly or you can Send to checker with review by clicking arrow down button.

Once you click send to check a prompt will appear



Click ok button to send to checker for approval.

Once Document Is Approved by Checker it will show in Document List Of Maker

The screenshot displays the PaperBank application interface. The top navigation bar is blue with the PaperBank logo, the text 'PaperBank', and a user profile 'Welcome Maker' with a notification badge. The sidebar on the left contains a 'Filter Documents' section with various search and filter options. The main content area is titled 'Document List' and features a table with the following data:

| Doc Type | Department | Branch | Document Name | Status | Location | Created By |
|----------|------------|-----------------|-------------------------------|--------|------------------|------------------|
| AOF | | BIRTAMOD BRANCH | MakerDocument | Active | AMARAPURI BRANCH | maker@rbb.com.np |

Below the table, the pagination controls show '1' of 1 items, 'Items Per Page' set to 10, and 'Total Documents : 1 Page : 1'.

Figure 21 Document List

Expiring Documents

Figure 22 Expiring Documents List

Those document that is going to expire is visible here. By entering the expiring week in the text box user can view the document the is going to expire.

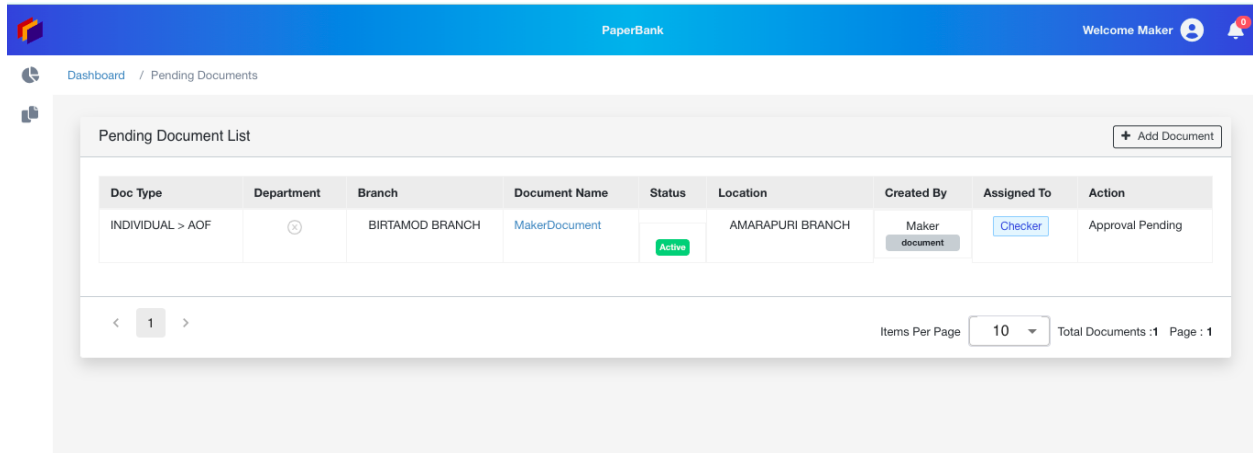
Expiring Document is only visible if it is added during document creation.

Expiry Date

Expiry Date in Document creation container.

Pending

In Maker user Pending Document list contains document which are not Approved by checker



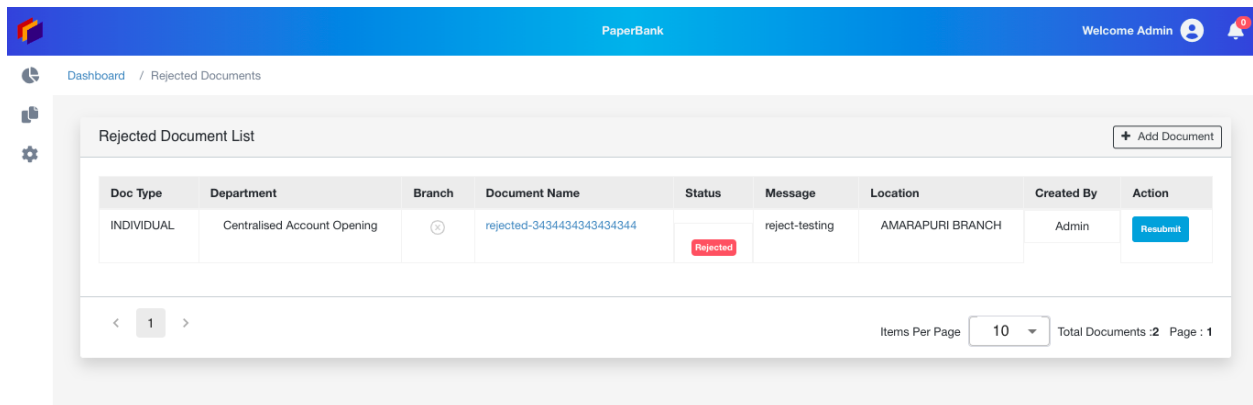
The screenshot shows the 'Pending Document List' interface in the PaperBank system. The header bar is blue with the PaperBank logo, 'Welcome Maker', and a notification bell. The breadcrumb trail is 'Dashboard / Pending Documents'. The table has columns: Doc Type, Department, Branch, Document Name, Status, Location, Created By, Assigned To, and Action. A single document is listed with status 'Active'. The footer shows pagination: 'Items Per Page 10', 'Total Documents :1', and 'Page : 1'.

| Doc Type | Department | Branch | Document Name | Status | Location | Created By | Assigned To | Action |
|------------------|------------|-----------------|---------------|--------|------------------|----------------|-------------|------------------|
| INDIVIDUAL > AOF | | BIRTAMOD BRANCH | MakerDocument | Active | AMARAPURI BRANCH | Maker document | Checker | Approval Pending |

Figure 23 Pending Documents List

In Checker users Pending Document list contains the document send by maker for approval.

Rejected



The screenshot shows the 'Rejected Document List' interface in the PaperBank system. The header bar is blue with the PaperBank logo, 'Welcome Admin', and a notification bell. The breadcrumb trail is 'Dashboard / Rejected Documents'. The table has columns: Doc Type, Department, Branch, Document Name, Status, Message, Location, Created By, and Action. A single document is listed with status 'Rejected' and a message 'reject-testing'. The footer shows pagination: 'Items Per Page 10', 'Total Documents :2', and 'Page : 1'.

| Doc Type | Department | Branch | Document Name | Status | Message | Location | Created By | Action |
|------------|-----------------------------|--------|-------------------------|----------|----------------|------------------|------------|----------|
| INDIVIDUAL | Centralised Account Opening | | rejected-34344343434344 | Rejected | reject-testing | AMARAPURI BRANCH | Admin | Resubmit |

Figure 24 Rejected Documents List

Rejected document list contains all the document which are rejected by checker. Maker can see the message for the reason document got rejected, resubmit the document after fix by clicking resubmit button.

Resubmit

Saved

| Doc Type | Department | Branch | Document Name | Status | Location | Created By |
|------------|-----------------------------|--------|-------------------------|--------|------------------|------------|
| INDIVIDUAL | Centralised Account Opening | | rbb-test-34344343434344 | Active | AMARAPURI BRANCH | Admin |
| INDIVIDUAL | Central Clearing | | testrbb-34344343434344 | Active | ARUNKHOLA BRANCH | Admin |
| INDIVIDUAL | Centralised Account Opening | | test-3383833333333333 | Active | AMARAPURI BRANCH | Admin |
| INDIVIDUAL | Central Clearing | | test-34344343434344 | Active | AMARAPURI BRANCH | Admin |

Figure 25 Saved Document List

Saved Document List Contains those documents which are submitted during document creation but are not sent to checker for approval. It contains Documents whose workflow has not been completed. User can resume those Documents by clicking document name and send them to checker.

Archived

| Doc Type | Department | Document Name | Status | Location | Created By |
|------------------|-------------------------------------|---------------|--------|---------------------------|--------------------|
| NATIONAL ID | Central Clearing | loan form | Active | HARINAGARA BRANCH | admin |
| AOF (Corporate) | | loan form | Active | AMARAPURI BRANCH | maker@ctznbank.com |
| AOF (Corporate) | | loan form | Active | ATTARIYA BRANCH (Kailali) | admin |
| AOF (Corporate) | | loan form | Active | BANEPRA BRANCH | maker@ctznbank.com |
| AOF (Corporate) | DEMAT/ASBA | loan form | Active | | maker@ctznbank.com |
| AOF (Corporate) | | loan form | Active | | maker@ctznbank.com |
| AOF (Corporate) | | loan form | Active | BANEPRA BRANCH | maker@ctznbank.com |
| AOF (Corporate) | RECOVERY DEPARTMENT | loan form | Active | AURAH BRANCH | maker@ctznbank.com |
| AOF (individual) | Centralised Account Opening | loan form | Active | | admin |
| AOF (individual) | TRADE AND ADMINISTRATIVE DEPARTMENT | loan form | Active | | admin |

Figure 26 Archived Document List

Documents that are expired and that are saved as archived document is visible on this page.

Favourite List

The screenshot shows the 'Favourite Document List' page in the PaperBank application. The interface includes a sidebar with navigation options: Dashboard, Documents, Expiring, Pending, Rejected, Saved, Archived, Favourite List (selected), Code Scanner, and Bulk Upload. The main content area displays a table of favourite documents. The table has columns for Doc Type, Department, Doc Name, Status, Location, and Created By. Two documents are listed: 'NATIONAL ID' with Doc Name 'maker_test_doc' and 'TAX CLEARANCE/AUDIT REPORT' with Doc Name 'open_account'. The page also features a search bar, pagination controls (showing 1 page), and a footer with 'PaperBank (c) 2019' and 'Powered by General Technology Pvt. Ltd.'.

| Doc Type | Department | Doc Name | Status | Location | Created By |
|----------------------------|---------------------|----------------|--------|------------------|------------------------|
| NATIONAL ID | | maker_test_doc | Active | | aayam_maker@rbb.com.np |
| TAX CLEARANCE/AUDIT REPORT | TREASURY DEPARTMENT | open_account | Active | ARUNKHOLA BRANCH | admin |

Figure 27 Favourite Document List

Documents that are added to the favorite list are shown in this list

The form contains two checkboxes with labels: 'Add to Favourite List' followed by a star icon, and 'Archived Now' followed by a folder icon.

By selecting Add to Favorite List in attachment section of document creation section user can add them into favourite list.

Code Scanner

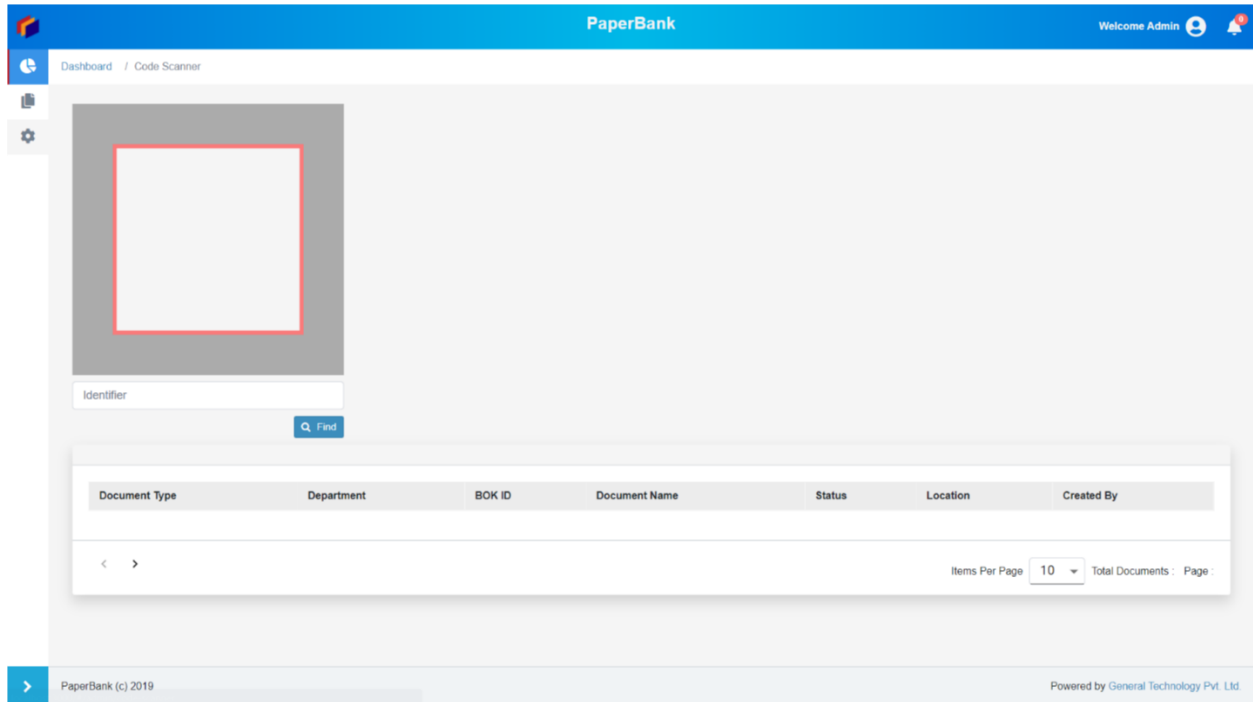


Figure 28 Code Scanner Dashboard

Code scanner scans the QR Code and allows to check out the document that is taken. The checkout status can be seen on the checkout log-in document view page.

- Code Scanner Ask Camera access to read QR code

Once QR Code is shown in camera it will identify the document

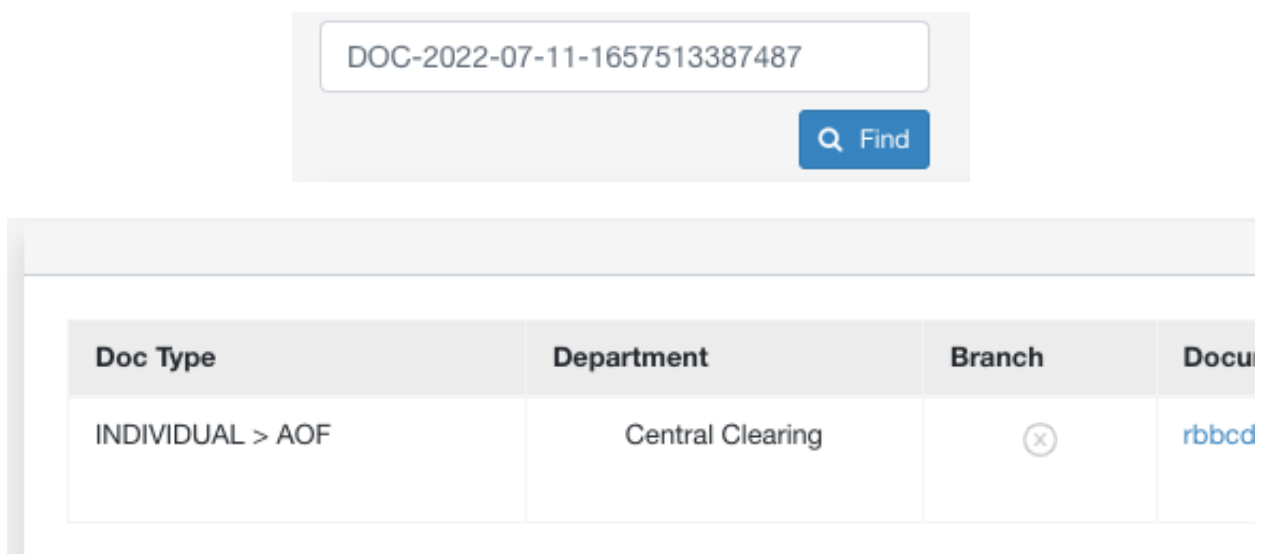


Figure 29 QR _ Document Info

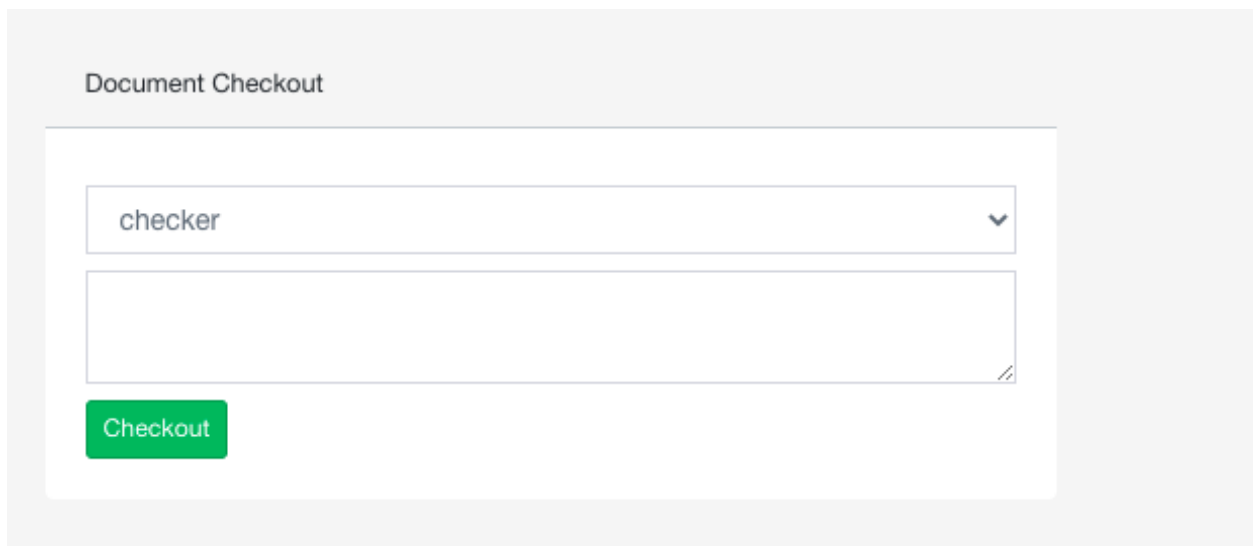
A screenshot of a web form titled "Document Checkout". The form is contained within a light gray box. It features a dropdown menu with the text "checker" and a downward arrow. Below the dropdown is a large, empty rectangular text area. At the bottom left of the form is a green button with the text "Checkout".

Figure 30 QR - Document Checkout

Document can be checkout ...

Click on document name on document list.



Clicking on View QR button in document information section user can print and the qr code and scan them into code scanner to access them quickly.



Figure 31 Generated QR

Bulk Upload

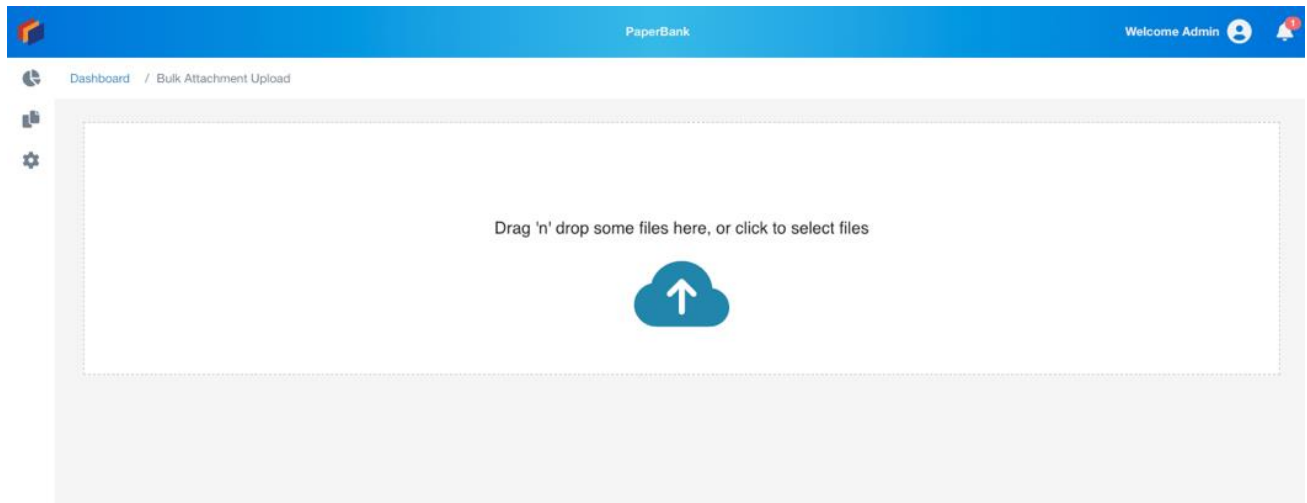
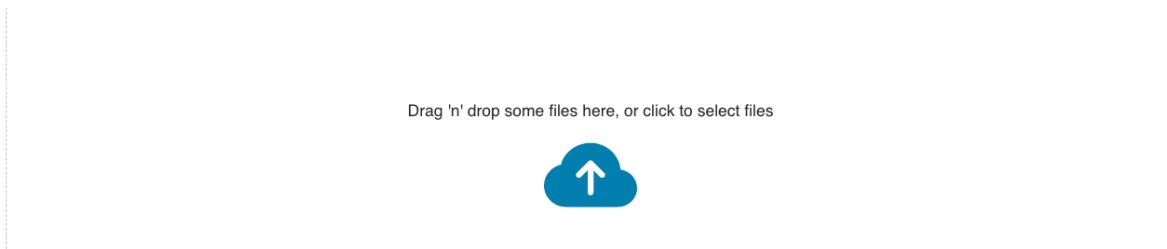


Figure 32 Bulk upload Section

In Bulk upload Section User can upload multiple document by either dragging them on clicking on this section as shown in the picture.



Once document is uploaded user have to index the document

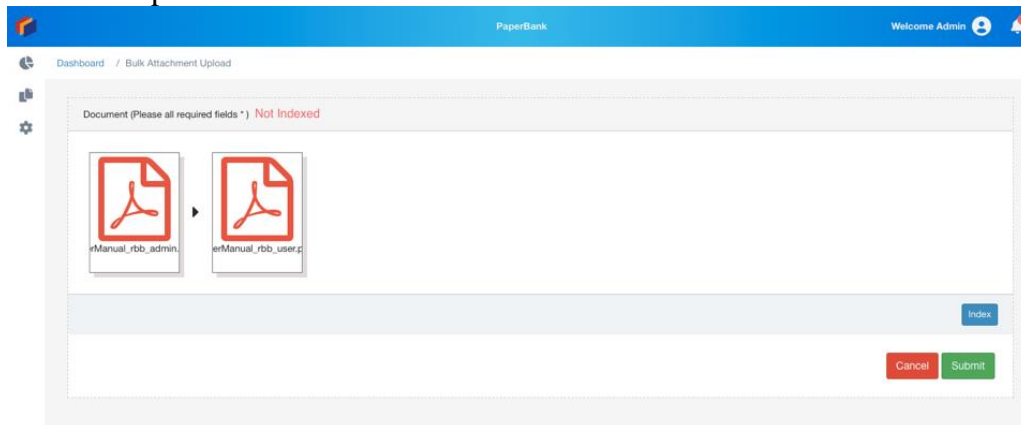


Figure 33 Bulk Upload - List

User can also index document in a bulk or Document can be index based on the types.



Figure 34 Bulk upload - Files Preview

Clicking on right arrow sign user can index them separately based on their types.

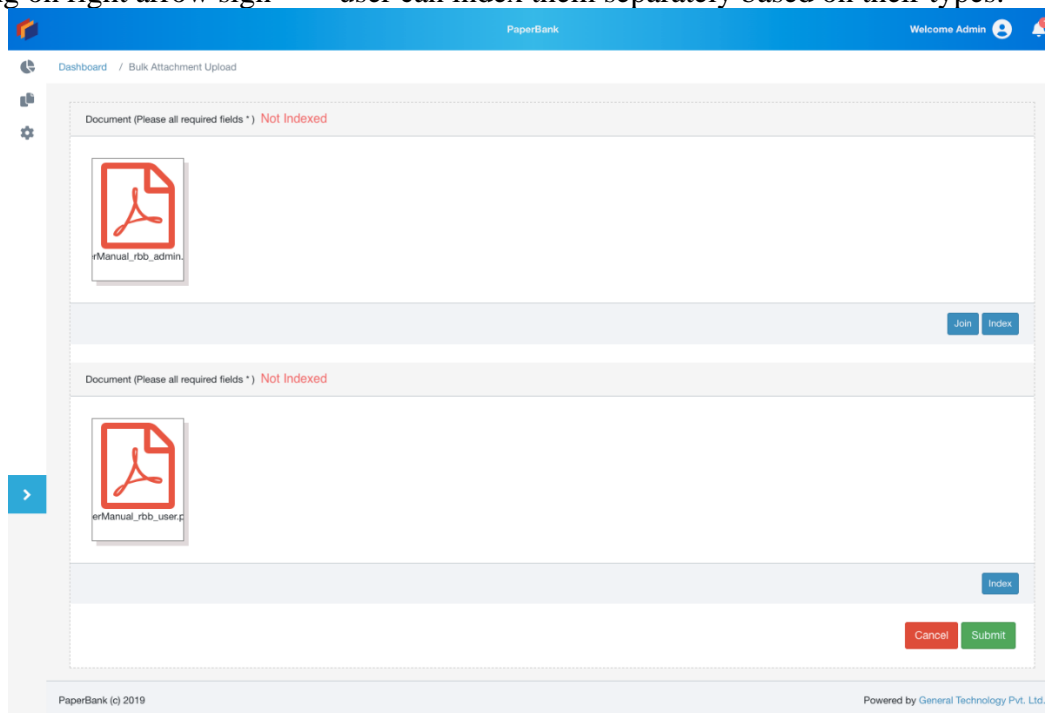
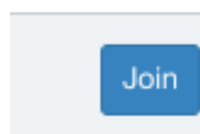
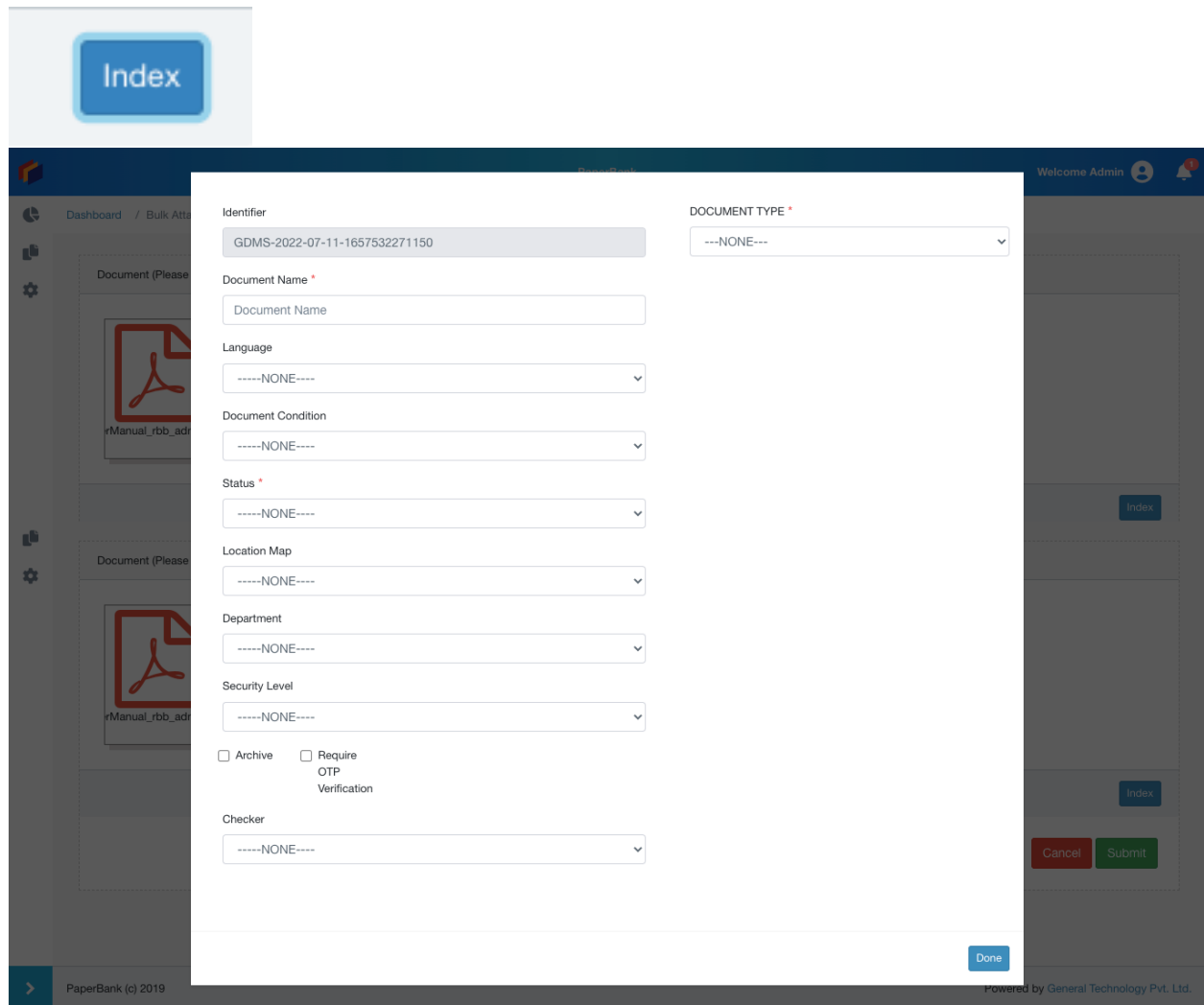


Figure 35 Bulk Upload - join

Or user can join them if they want to index them at once



Then Click on index Button for indexing the uploaded documents



The image shows a user interface for indexing documents. At the top, there is a blue button labeled 'Index'. Below it, a modal form titled 'Bulk upload - Index' is displayed. The form contains the following fields and options:

- Identifier:** A text field containing 'GDMS-2022-07-11-1657532271150'.
- DOCUMENT TYPE *:** A dropdown menu with the option '---NONE---'.
- Document Name *:** A text field with the placeholder 'Document Name'.
- Language:** A dropdown menu with the option '----NONE----
- Document Condition:** A dropdown menu with the option '----NONE----
- Status *:** A dropdown menu with the option '----NONE----
- Location Map:** A dropdown menu with the option '----NONE----
- Department:** A dropdown menu with the option '----NONE----
- Security Level:** A dropdown menu with the option '----NONE----
- Archive:** A checkbox.
- Require OTP Verification:** A checkbox.
- Checker:** A dropdown menu with the option '----NONE----

At the bottom right of the form is a blue button labeled 'Done'. The background shows a dashboard with a sidebar and a main content area with document thumbnails.

Figure 36 Bulk upload - Index

Once Data is entered click done and click submit to submit the document.
Then document is shown in [Document list](#) Section.