

# Document Management System

**User  
Documentation**



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**For Checker User**

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## User Login:

**Note: Checker User Is Created by Admin, Super Admin. Maker is needed for Checker**

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

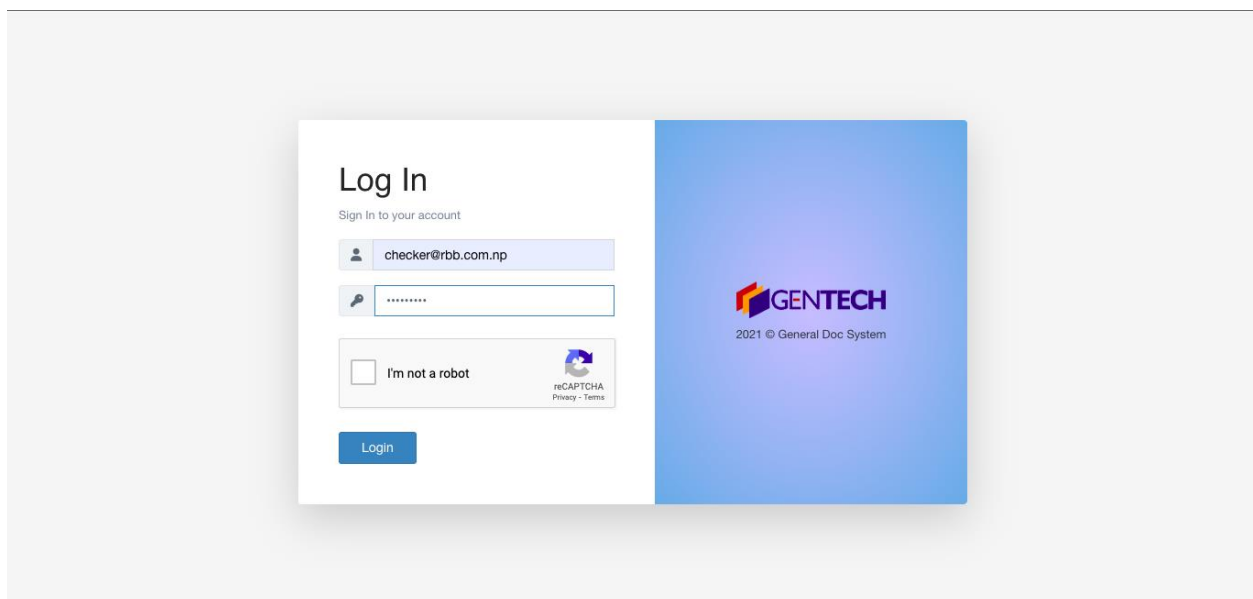
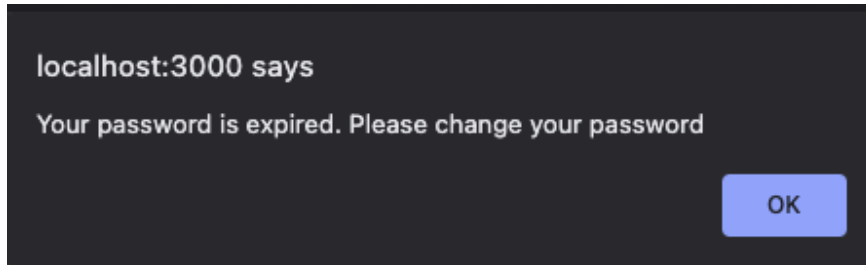


Figure 1 Login Dashboard

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 Checker, It will say password expired Click OK and change password



Once You Click Ok. You can change new password

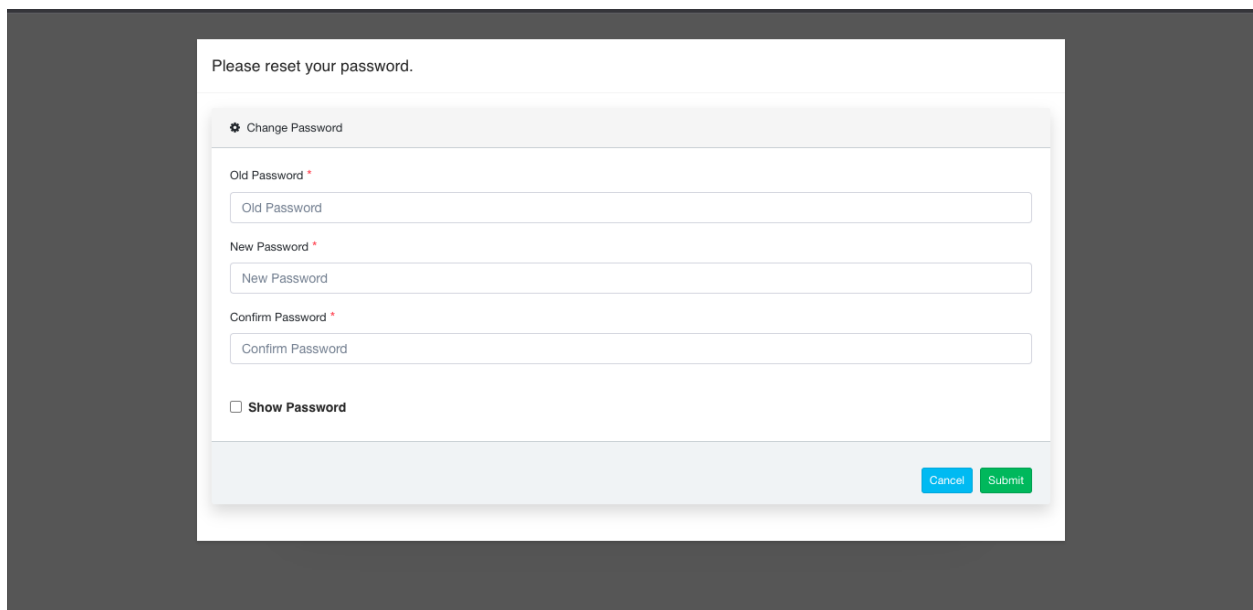
A 'Change Password' form with a white background and a light gray border. At the top, it says 'Please reset your password.' Below this is a header bar with a gear icon and the text 'Change Password'. The form contains three input fields: 'Old Password \*', 'New Password \*', and 'Confirm Password \*'. Each field has a placeholder text 'Old Password', 'New Password', and 'Confirm Password' respectively. Below the input fields is a checkbox labeled 'Show Password'. At the bottom right, there are two buttons: 'Cancel' (blue) and 'Submit' (green).

Figure 2 Password Change

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

# Dashboard

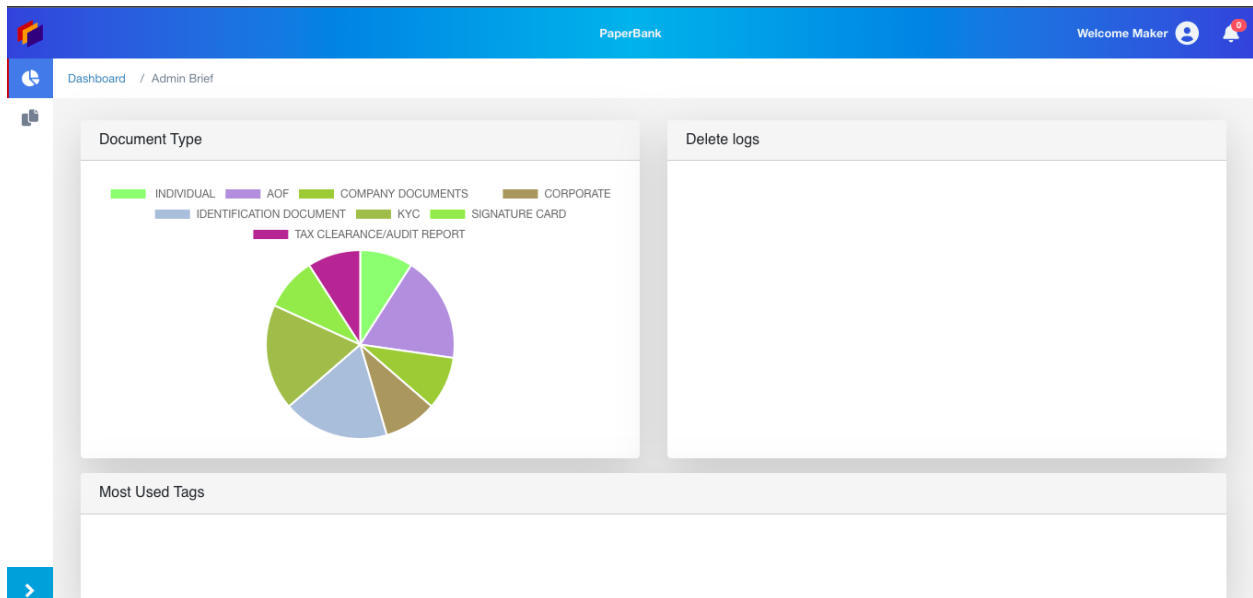


Figure 3 User Dashboard

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.

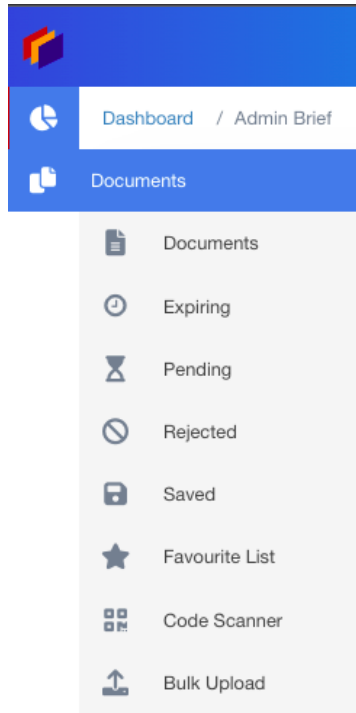


Figure 4 Side Bar Menu

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



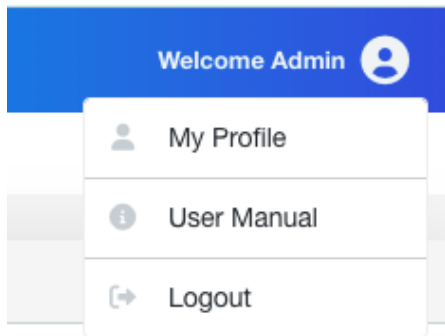
Click on the Desired Section to Expand the Features List

## 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 Checker username. If you click the user icon on the left side you see My profile, User Manual, Logout



## My Profile:

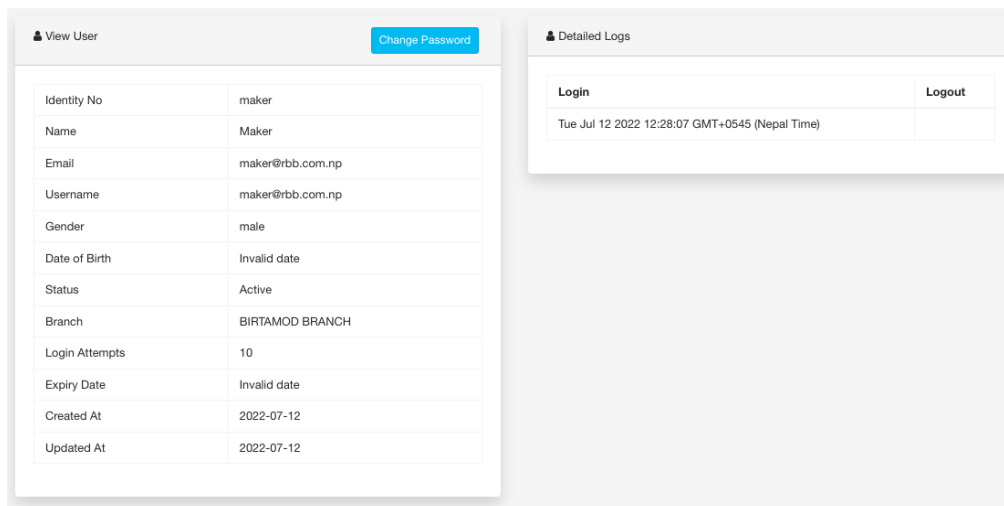


Figure 5 User Profile View

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:

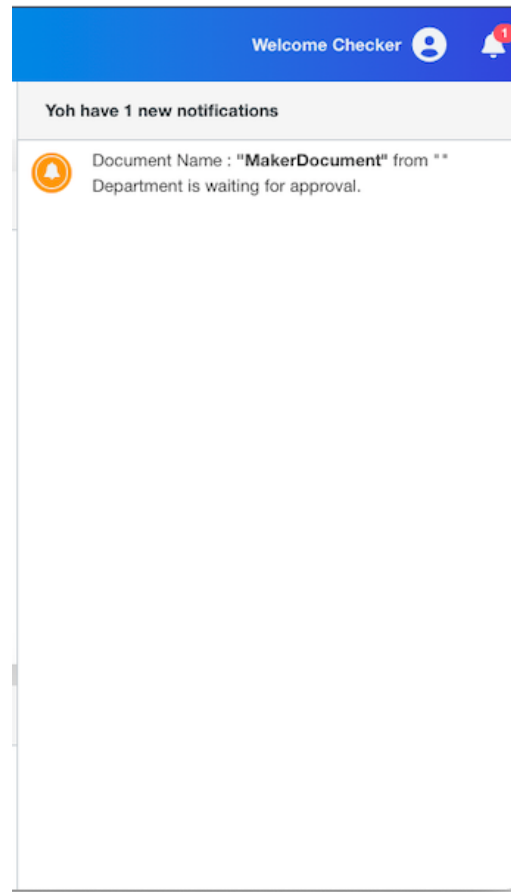


Figure 6 Notification Panel

Notification section on Checker shows the document is send by Maker for approval. Checker can click the notification to access the document.



## Documents Section:

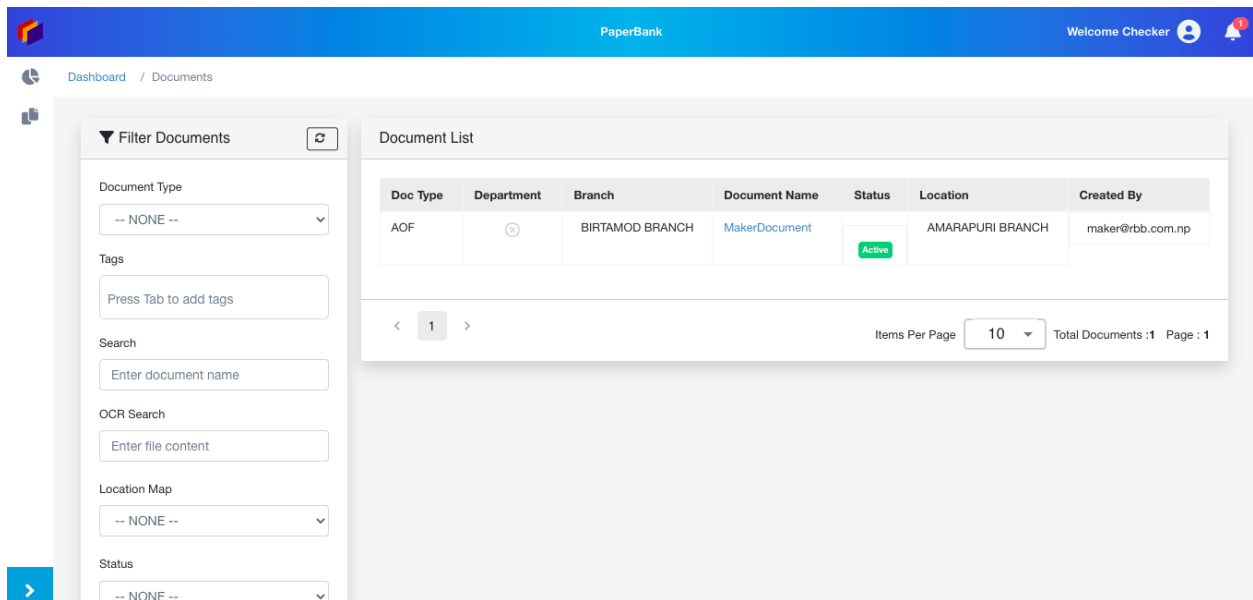


Figure 7 Document Section

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.

The image shows a 'Filter Documents' form with the following elements:

- Filter Documents** (Title bar with a reset icon)
- Document Type**: A dropdown menu currently showing '-- NONE --'.
- Tags**: A text input field with the placeholder 'Press Tab to add tags'.
- Search**: A text input field with the placeholder 'Enter document name'.
- OCR Search**: A text input field with the placeholder 'Enter file content'.
- Location Map**: A dropdown menu currently showing '-- NONE --'.
- Status**: A dropdown menu currently showing '-- NONE --'.
- Document Added From:**: A date input field showing 'mm/dd/yyyy' with a calendar icon.
- To**: A date input field showing 'mm/dd/yyyy' with a calendar icon.
- Reset**: A grey button at the bottom of the form.

Figure 8 Document Search

Image Showing Document Filter Section in Checker

## Documents list

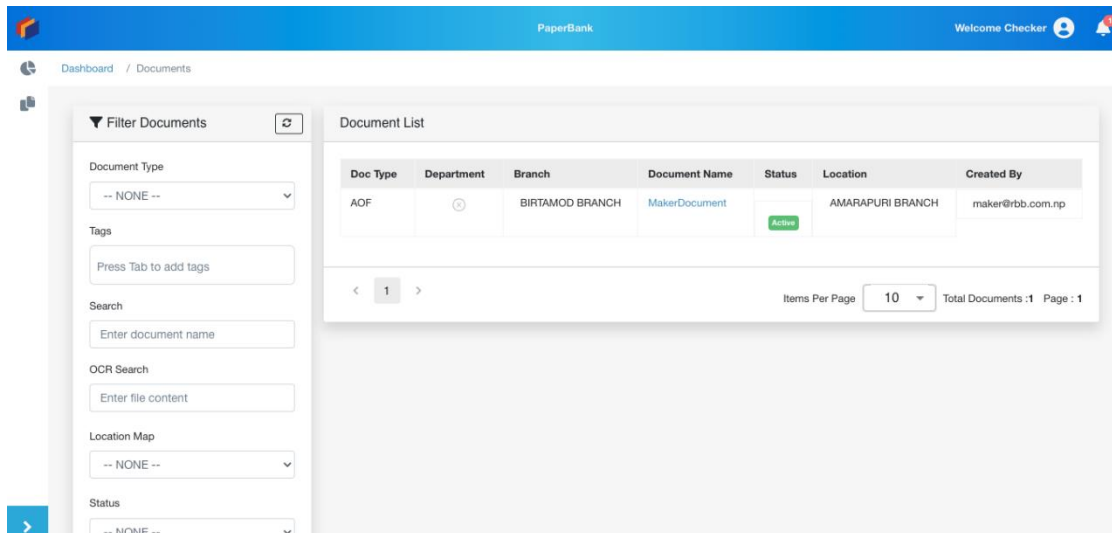
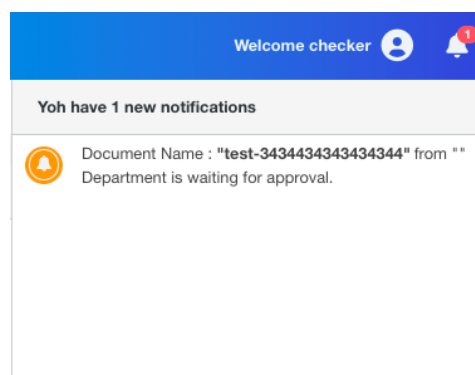


Figure 9 Document List

This page shows list of Documents created by Maker which are approved by checker. Document is only Visible here once Checker user approved Maker Document.

**Note: Checker User Doesn't Create a document only Maker User creates and edit Documents**

Once document is sent to desired checker it will show in notification of checker user. Checker can click the notification for review or by going to pending List





[illegible]


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## Document Information

In Document Information Section Checker Can Approve or reject The Document

Document Information



 View QR

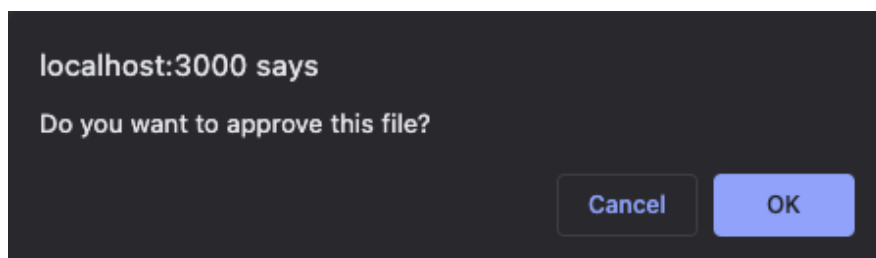
Document Type	INDIVIDUAL
Identifier	DOC-2022-07-11-1657518363346
Feature	No feature available
Document Name	test-3434434343434344
Security Hierarchy	Super-001

Figure 11 Document Information

- To Approve Document Checker can click on Tick green Button.



- Then a popup appears.

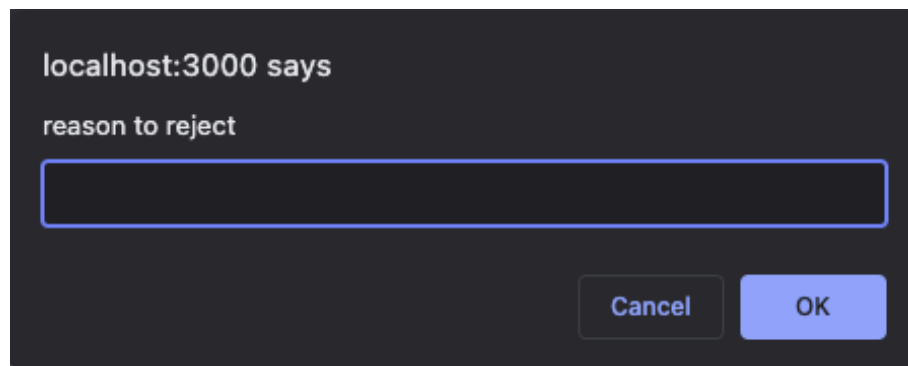


If checker click ok the document is approved and it will show in document list of maker users.

- Checker can reject the document by clicking cross reject.



- Then a popup appears.



Checker can provide the detail on why the document has been rejected.

## Preview File

Checker can preview the document maker uploaded To check

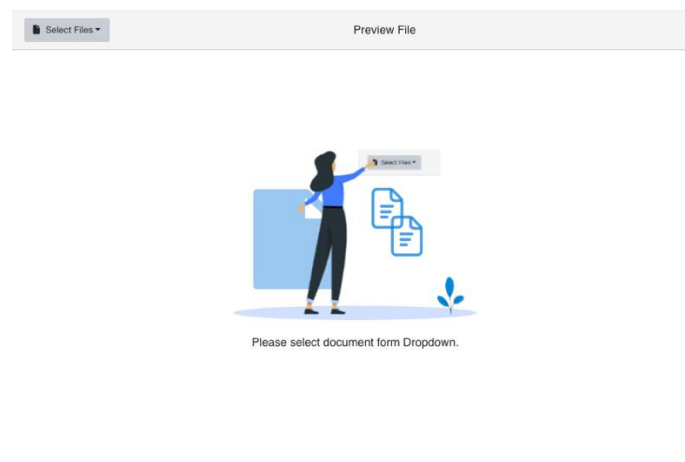


Figure 12 Preview - Document

## Pending

In Checker users Pending Document list contains the document send by maker for approval. Checker here can accept or reject the document.

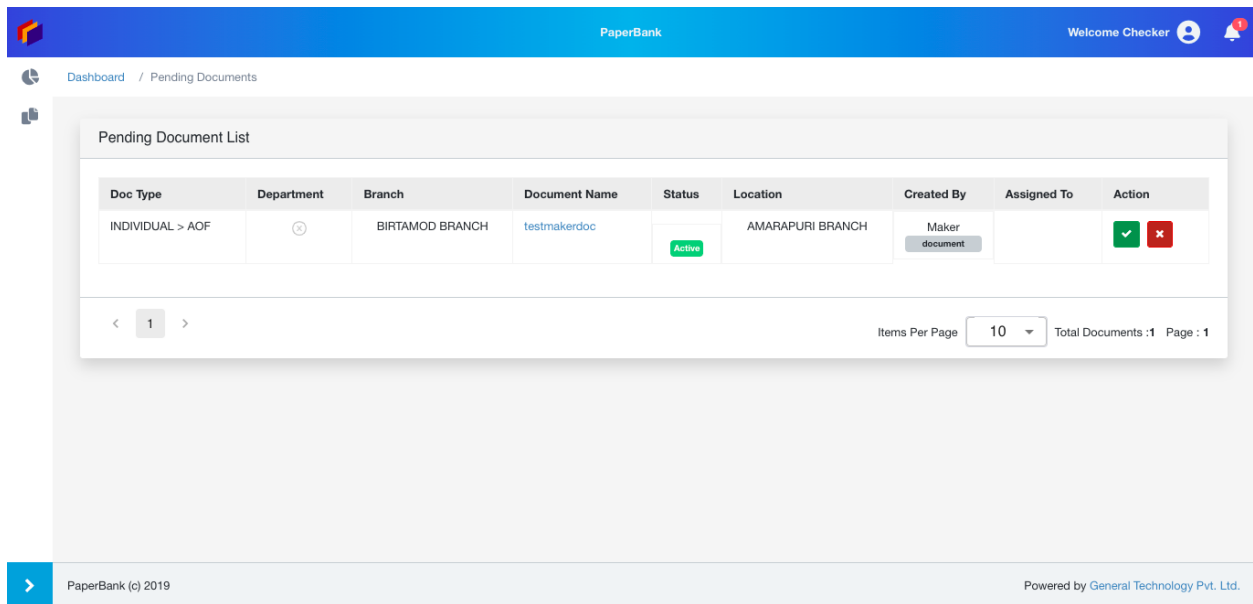
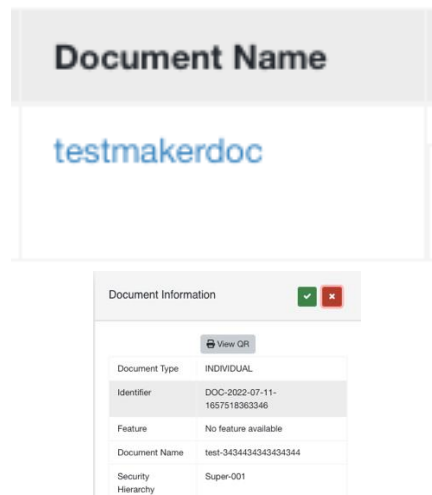


Figure 13 Pending Documents

By clicking on document Name Checker the preview the document



See Above In [Document List](#) Section For More Info on Approving and Rejecting Document.