Document Management System

User Documentation

Rastriya Banijiya Bank

For Checker User

Contents

User Login:

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.

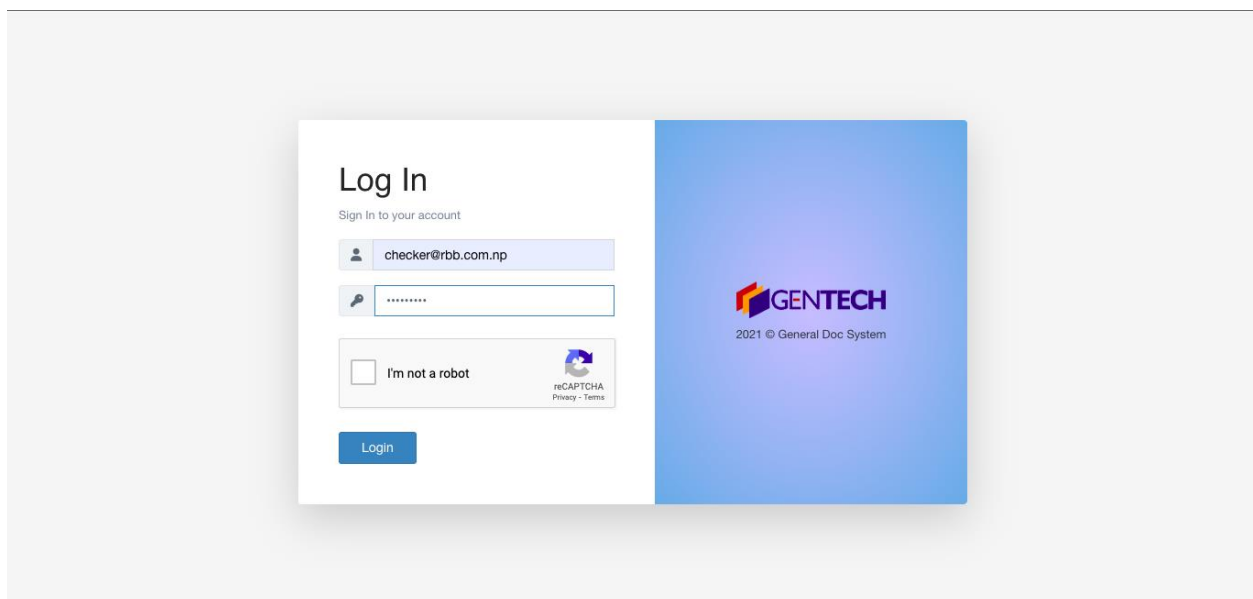This Is the login Screen of Document Management System

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
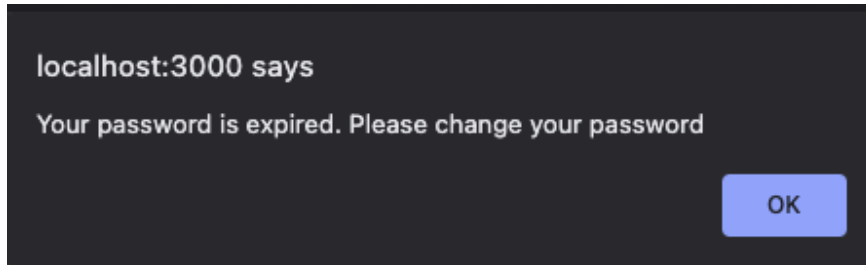
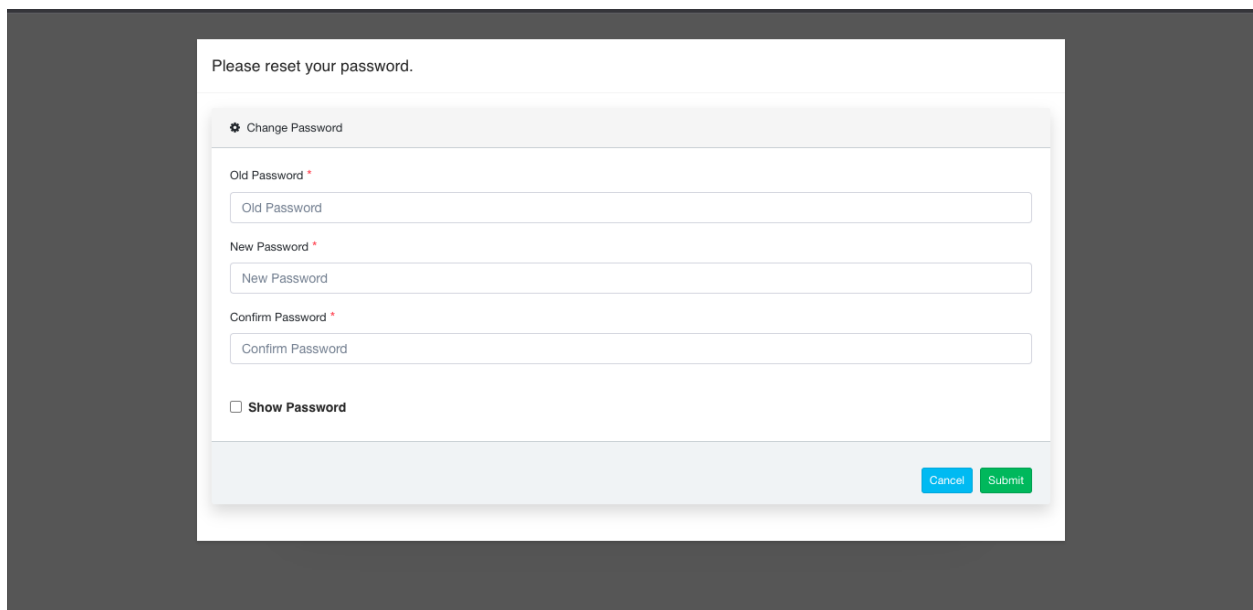Once You Click Ok. You can change new password

Figure 2 Password Change

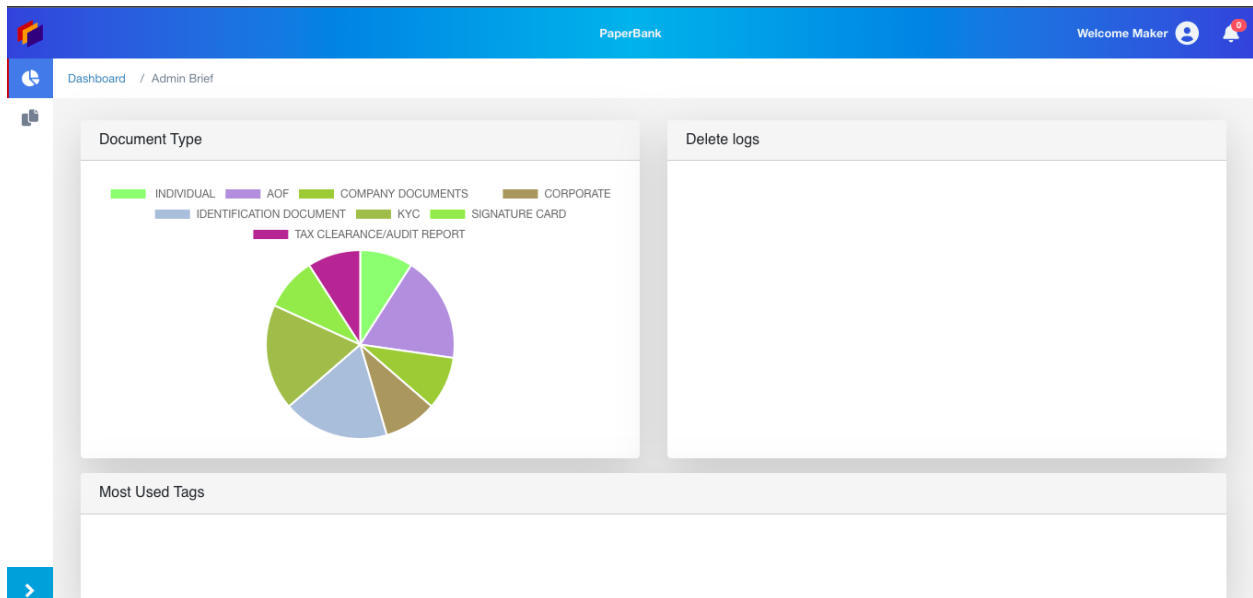Note Old Password is assigned by Admin User Who Manages User Account

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.
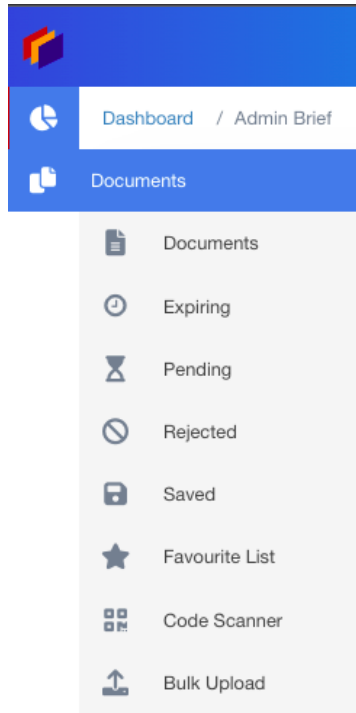
Figure 4 Side Bar Menu

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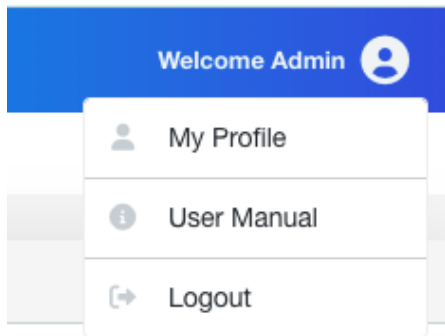Here you See two Section

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 profle, User Manual, Logout
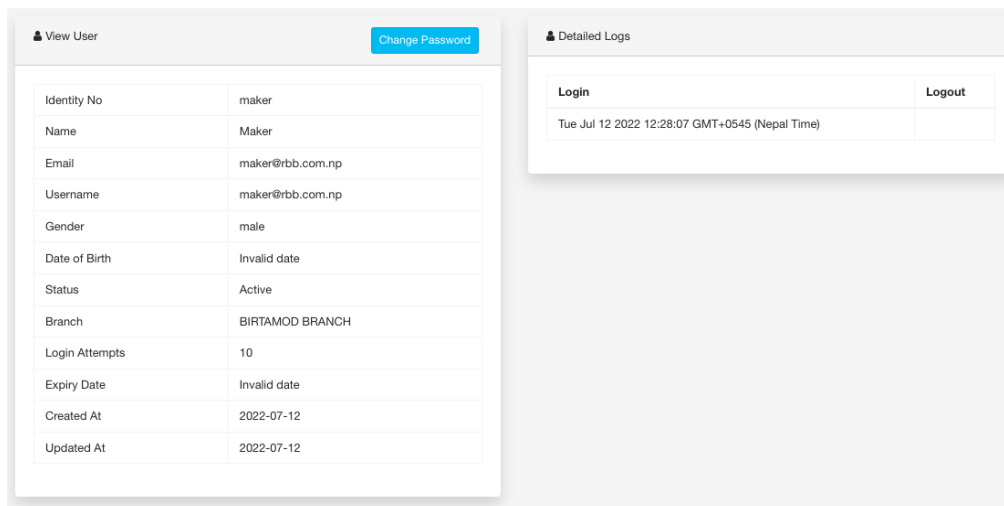

My Profile:

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 <u>Logout:</u> to logout of DMS system or to switch user.
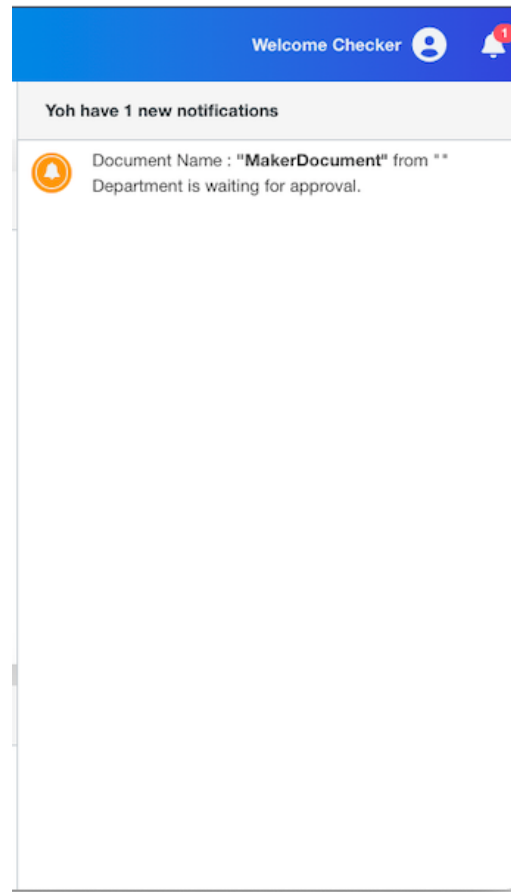
Notification:

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.
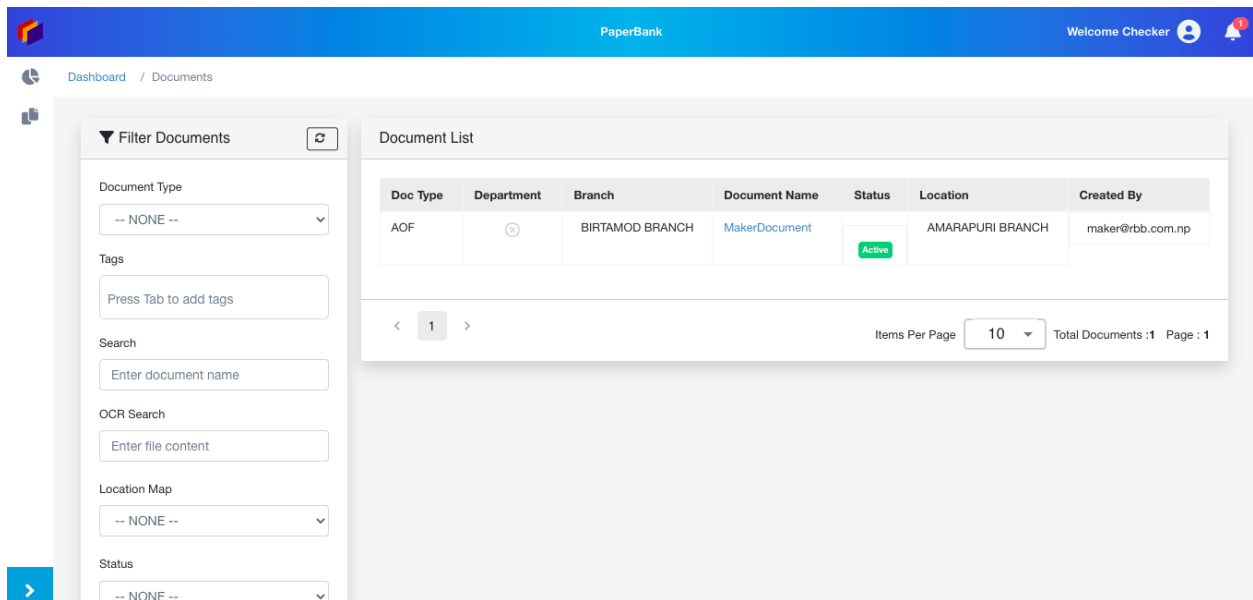
Documents Section:

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.

Figure 8 Document Search

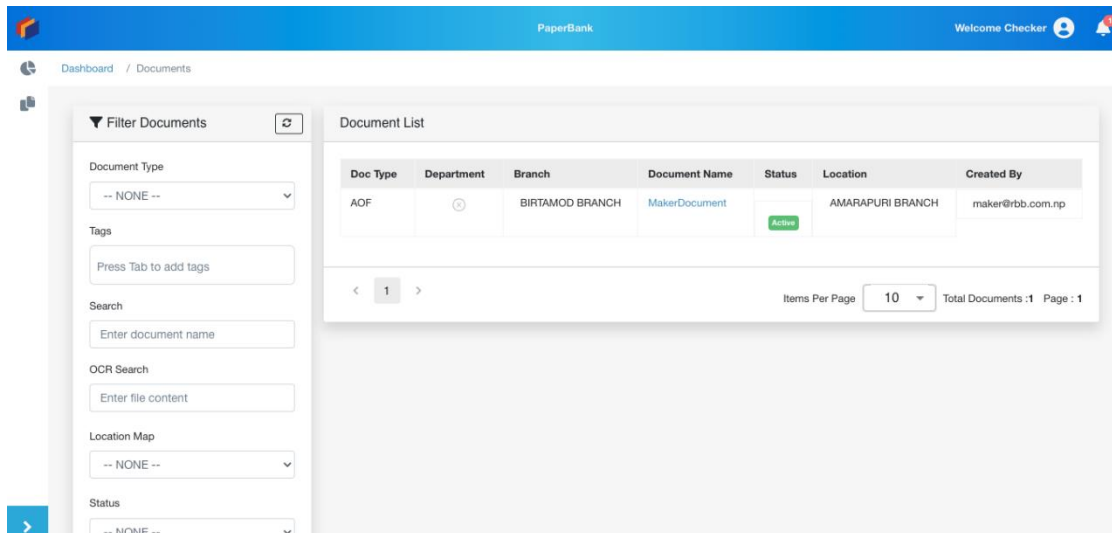Image Showing Document Filter Section in Checker

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

Checker can preview the document by clicking select files.

Figure 10 Document Preview
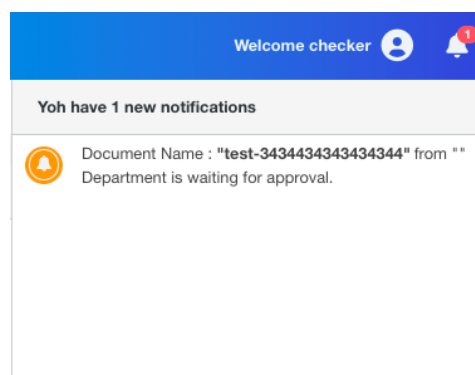
Document Information

In Document Information Section Checker Can Approve or reject The Document

Figure 11 Document Information

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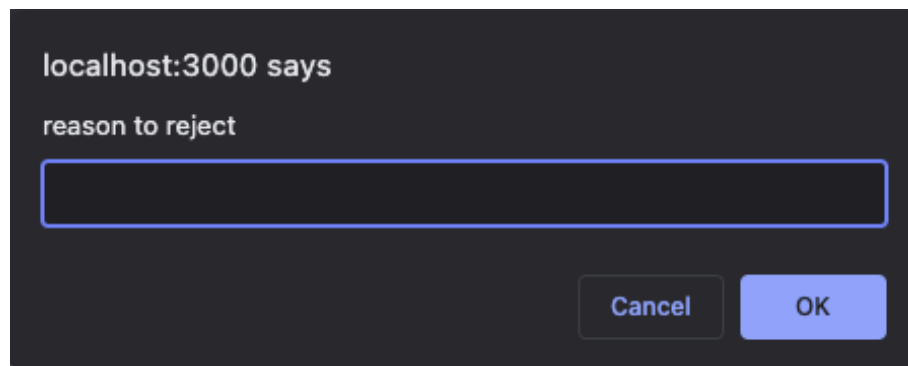

- Then a popup appears.
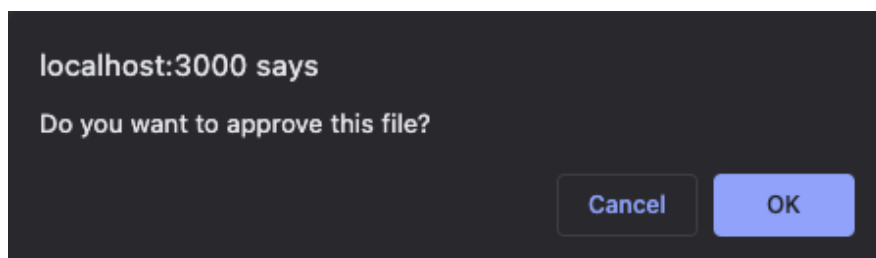
If checker click ok the document is approved and it will show in document list of maker users.

- 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

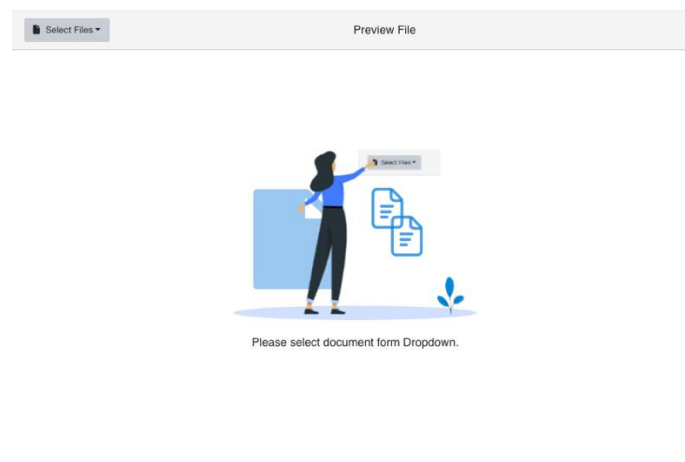Checker can preview the document maker uploaded To check

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.
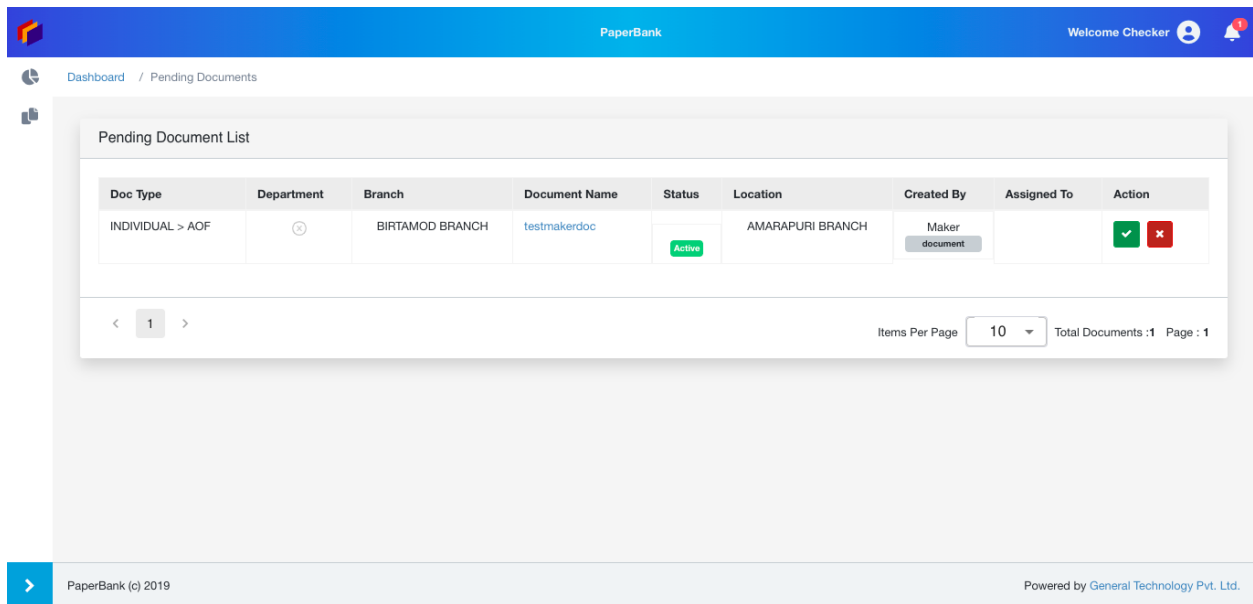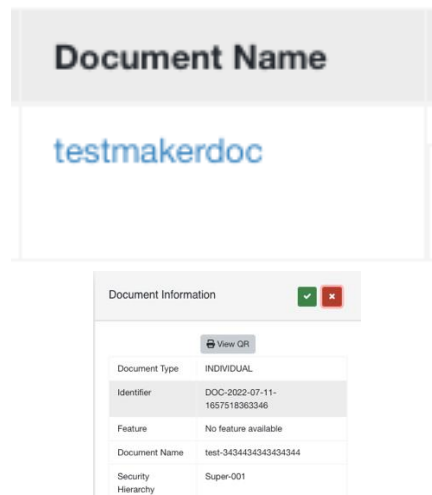

Figure 13 Pending Documents

By clicking on document Name Checker the preview the document

See Above In Document List Section For More Info on Approving and Rejecting Document.