General DMS

User Manual

Table of Contents

User Login 4

Dashboard 4

Document Section 5

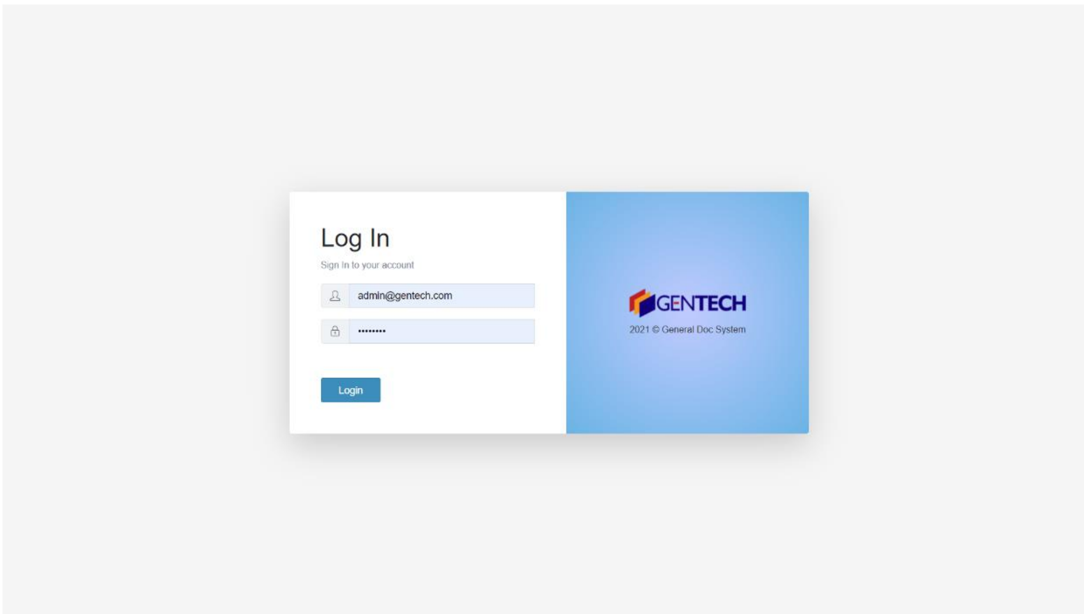
- Documents 5
  - Document list filter 6
  - Document View 8
- Expiring 12
- Pending 12
- Archived 13
- Favorite List 13
- Code scanner 14

Settings Section 15

- Roles 15
- Users 19
  - User list filter 20
- Document Types 22
  - Document Types Hierarchy 22
- Document Index 23
- Location Maps 25

User Login

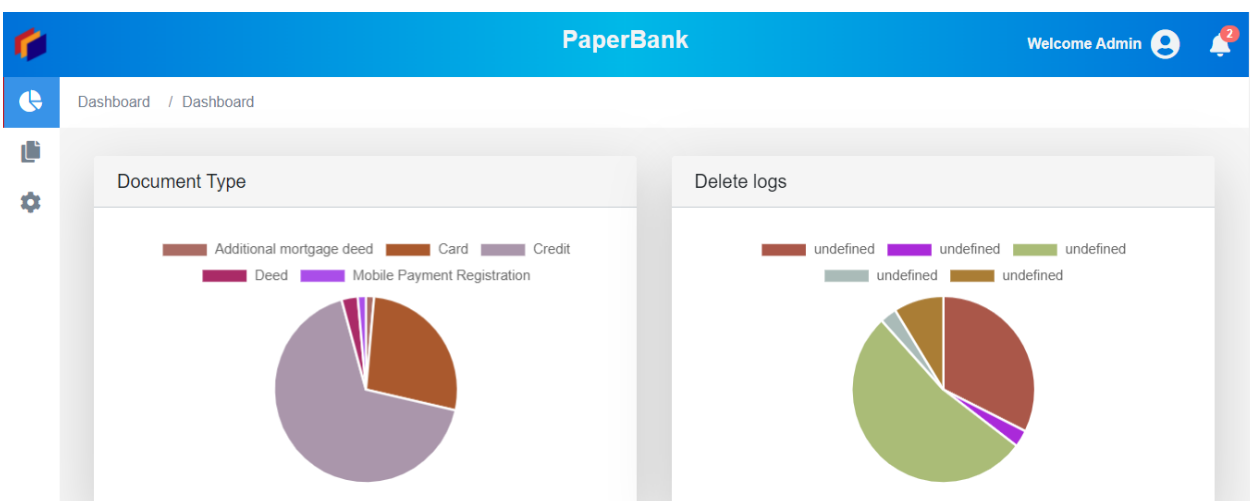
1. Enter the valid “Username” and “Password”
2. Click the “Login” button to verify the email and password.



3. the credential is verified, the system will redirect to the dashboard.

Dashboard

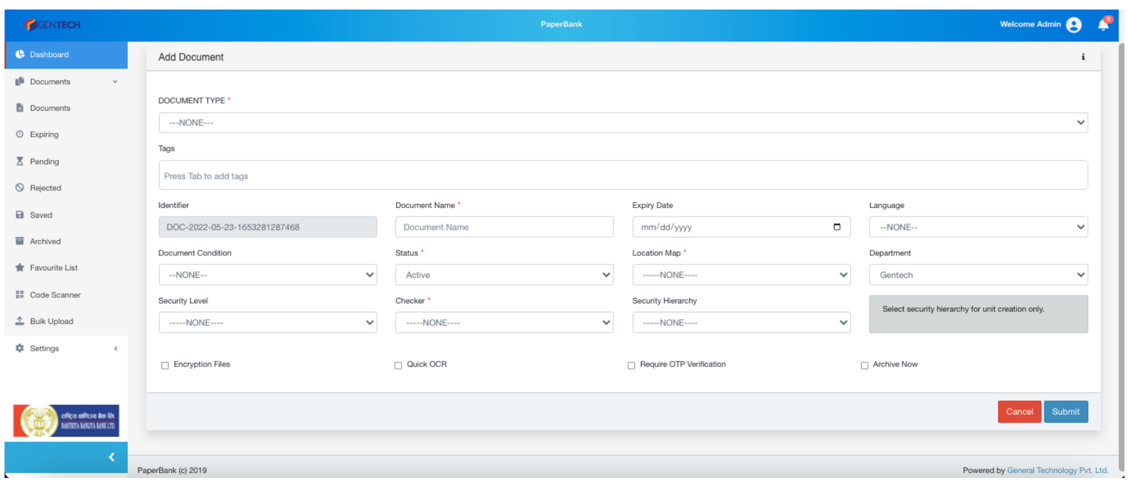
In the dashboard, the user can view the quick information regarding “Document Types”, “Delete Logs” of the document, and the information regarding the “Total Document”.



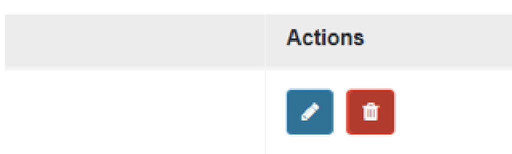
Document Section

Documents

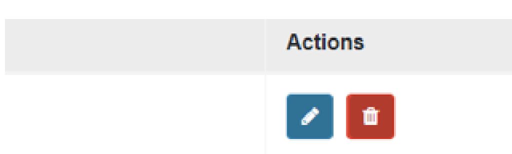
1. Click on the “Documents” tab from the navigation.
2. Click on the “Add Document” button to add a new Document.
3. Enter all the required fields which are denoted by (*) in the document add page and click “Submit” to create a branch or click “Cancel” to cancel the document creation.



5. Click on “Pencil Icon” to edit or assign permission to the created document.

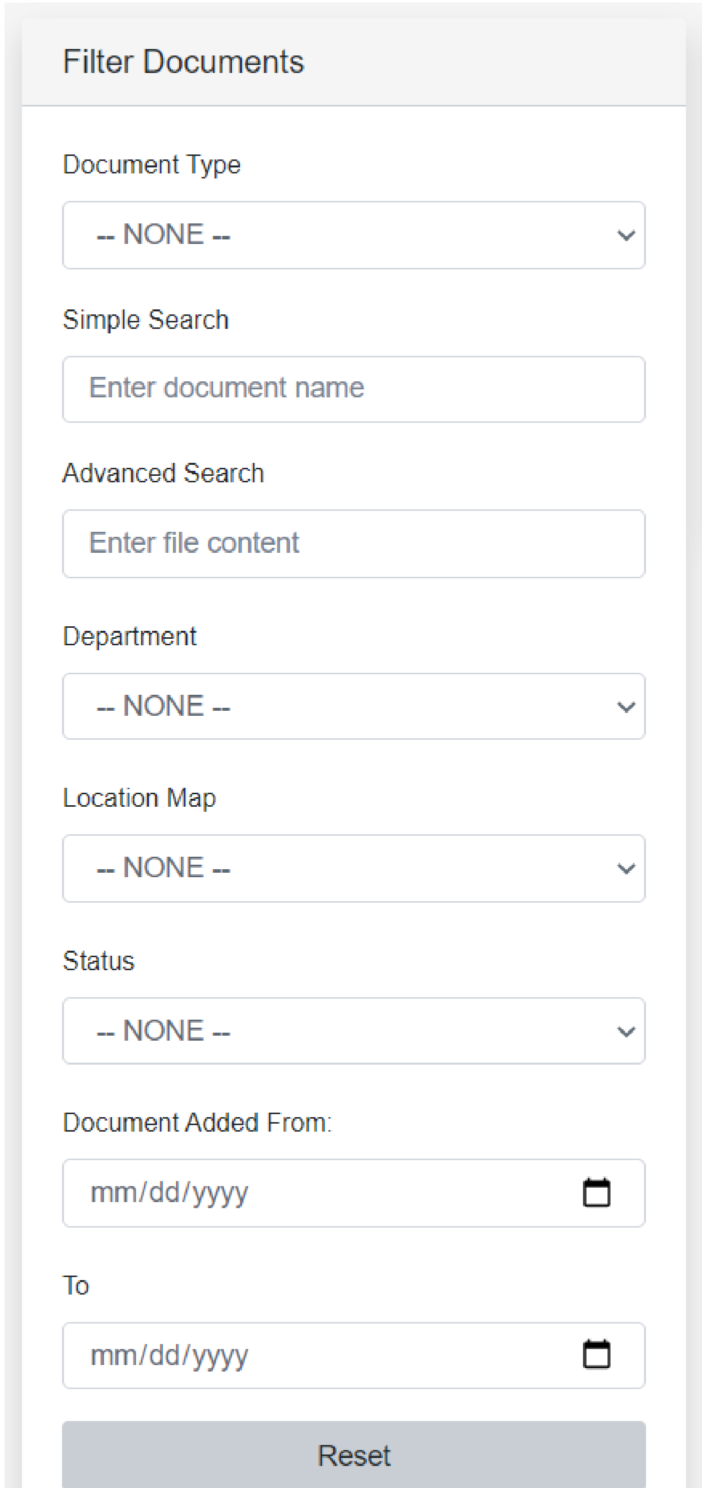


6. Click on “Trash Icon” to delete the document.



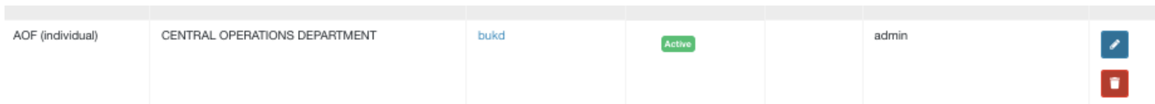
Document list filter

- User can be filtered in various ways
- Filter by Document Type
    - Select the document type from the “Document Type” dropdown to filter.
- Simple Search
    - Search by document name by entering “Document Name” in the search box.
- Advanced Search
    - It is a quick OCR search that searches through documents and images.
- Filter by Department
    - Select the department from the “Department” dropdown to filter.
- 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.

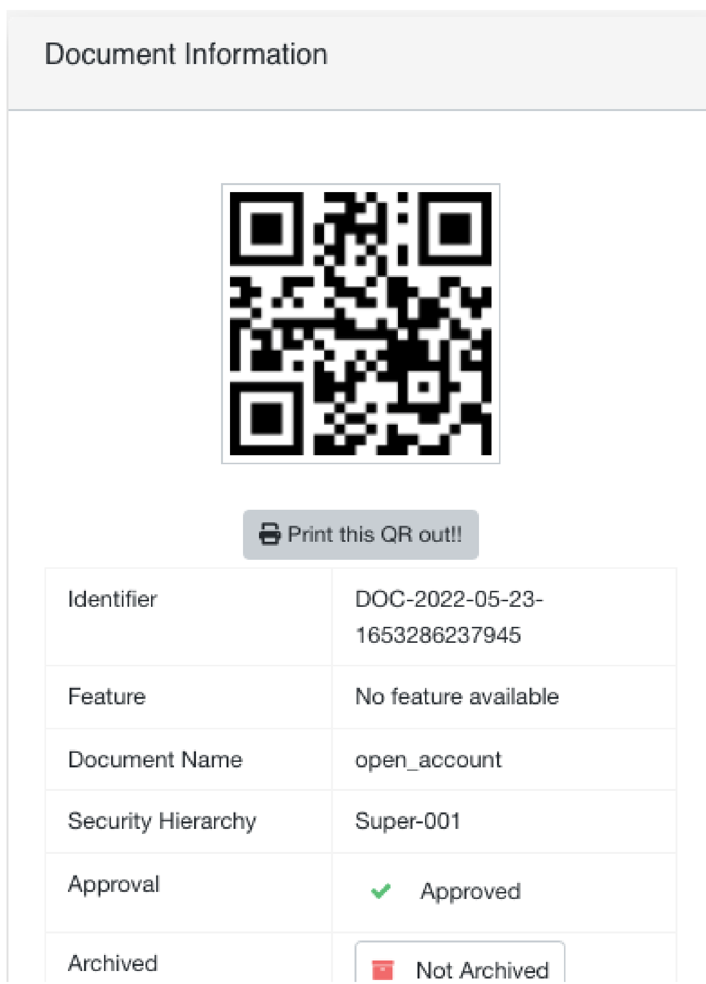

Filter Documents
Document Type
-- NONE --
Simple Search
Enter document name
Advanced Search
Enter file content
Department
-- NONE --
Location Map
-- NONE --
Status
-- NONE --
Document Added From:
mm/dd/yyyy
To
mm/dd/yyyy
Reset

Document View

1. Click on the document name from the document list to view the selected document

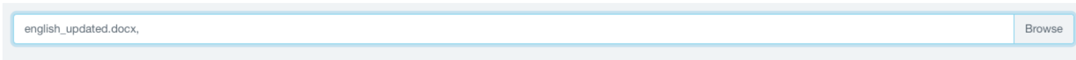


2. There are multiple sections inside the document view page.
    a. Document Information
        i. All information of the document can be viewed in this section as shown in the figure above
        ii. Scroll over the information if there is more information.

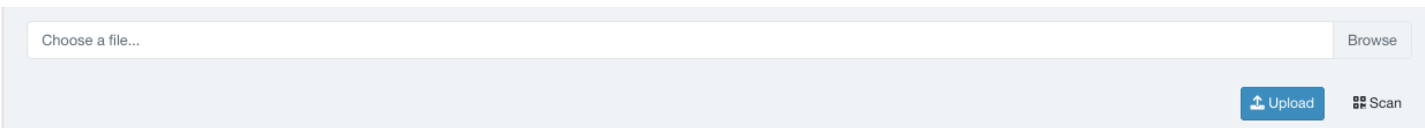


b. File Upload in the document.

    i. Click on the “Browse” button to reveal an upload pop-up.

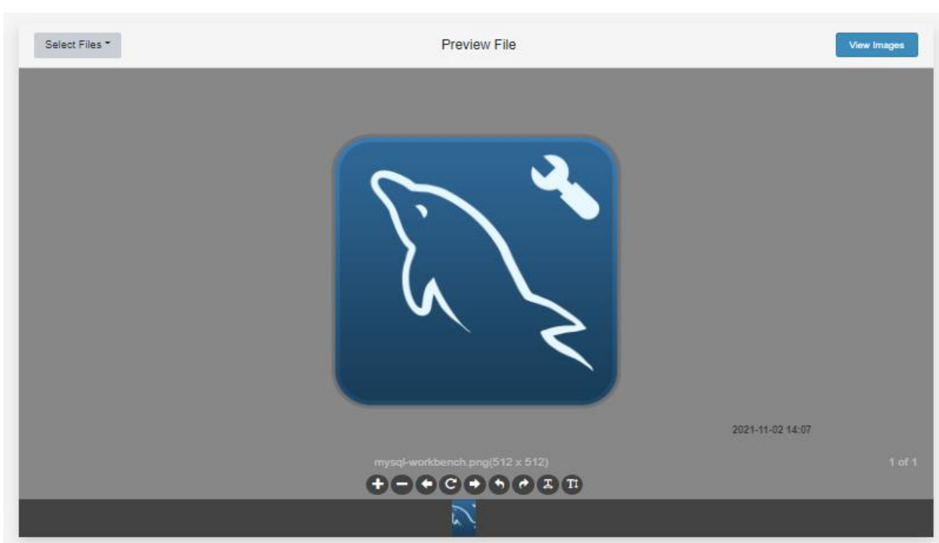


    ii. Choose a file by clicking he “Browse” button.
    iv. Click the “Submit” button to upload a file.

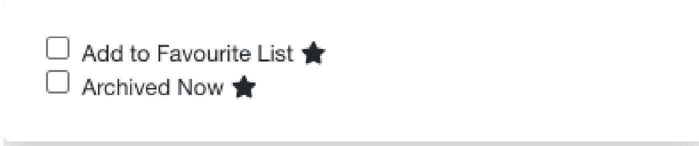


c. Preview File and Images

    i. Select the file from the “Select File” button.
    ii. Click on the “View Image” button to view the image attached to the document.

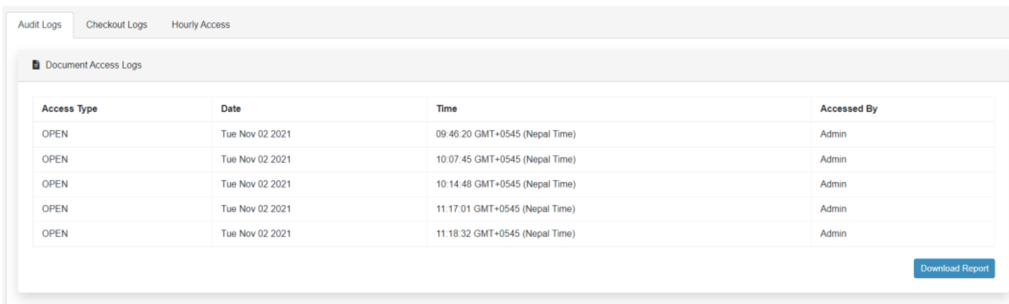


d. Add To Favorite Section and archieve section.



Audit log

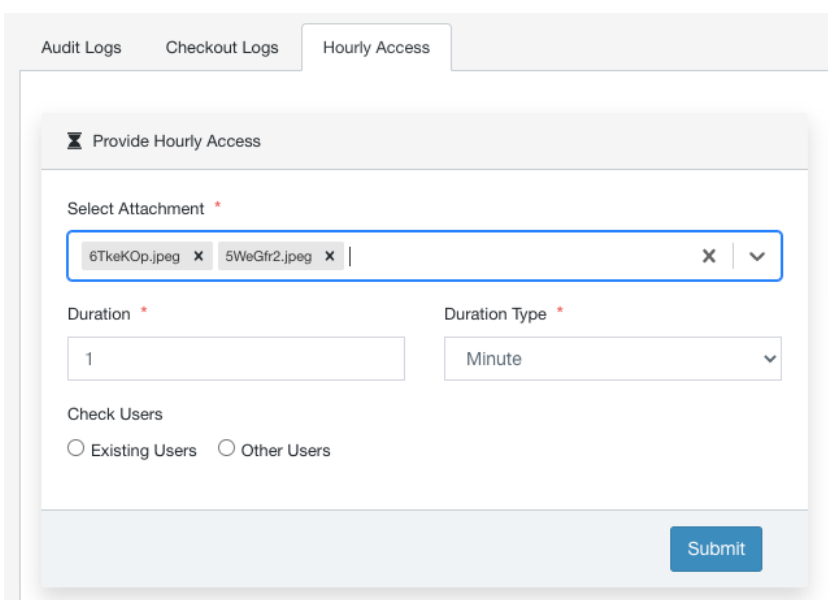
This tab provides all the information of the document being accessed, hourly access provided, the document is modified, etc.



Hourly Access

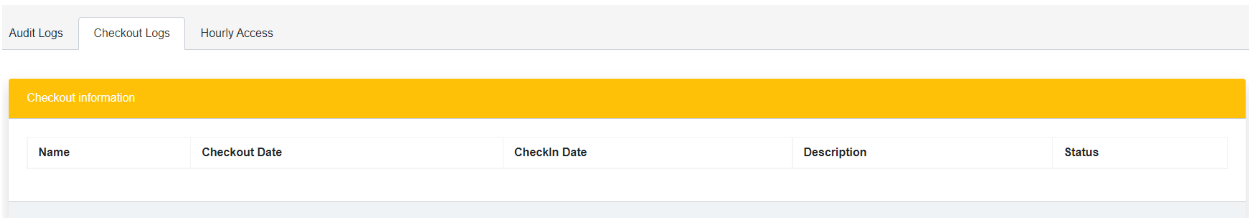
This lets us provide access to the document for existing or users outside the system for a certain amount of time.

- Select the document(s) that you want to give access to from the "Select Attachment" dropdown.
- Select "duration" and "Duration Type" for document access.
- Check which used to provide from the radio button and click submit or add other users.



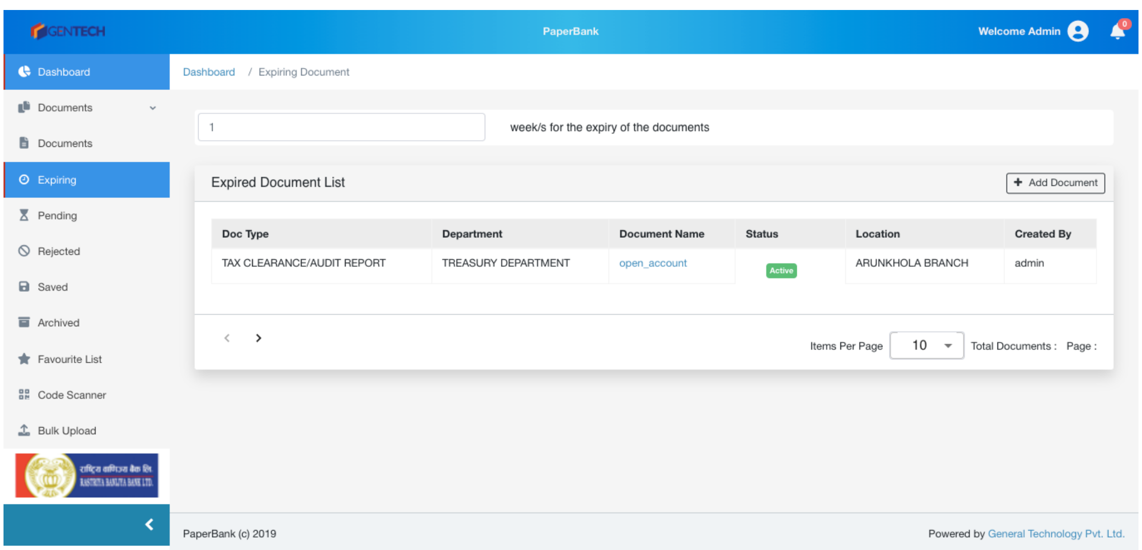
Checkout logs

Document this is returned can be seen in this tab.



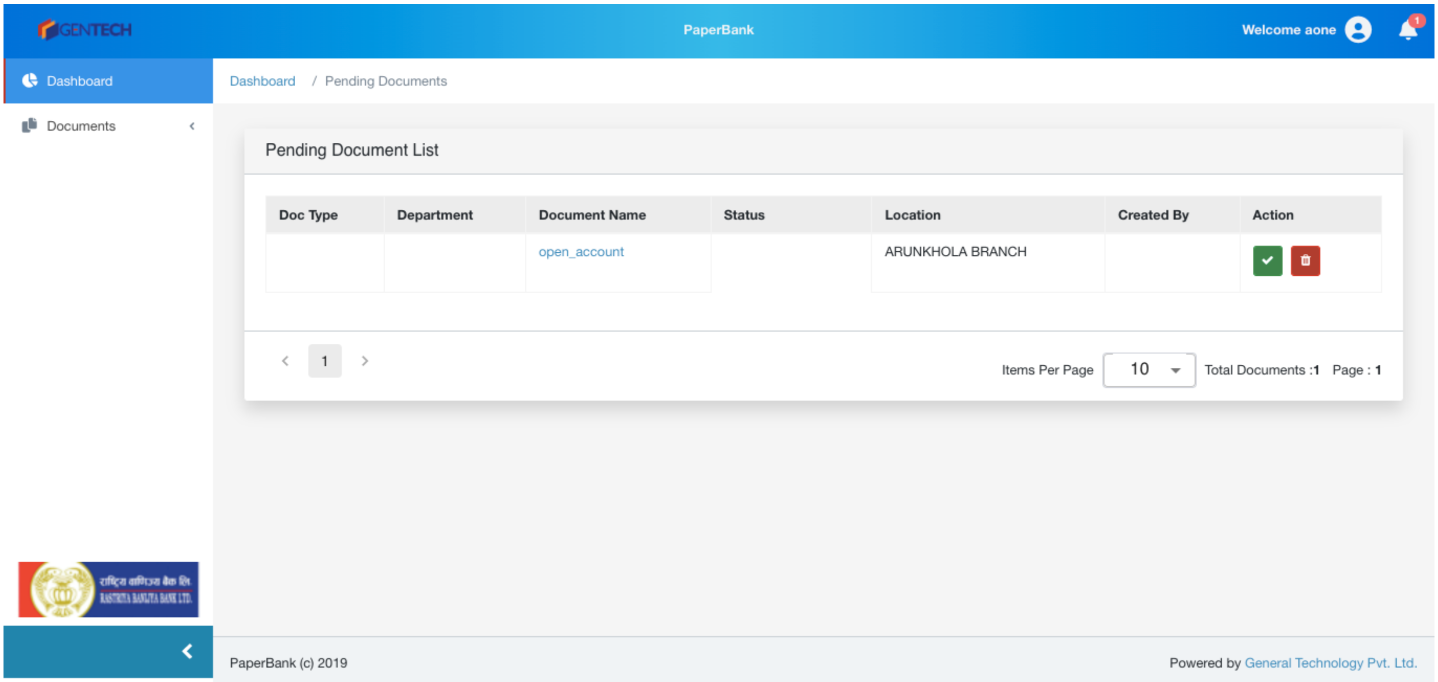
Expiring

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.



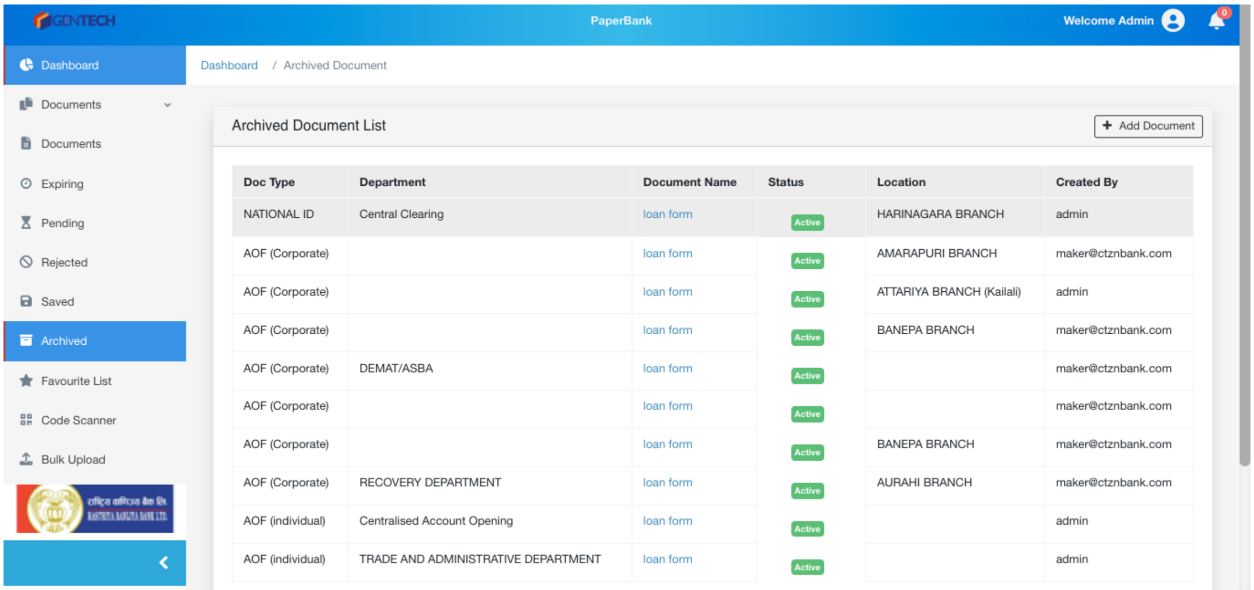
Pending

Document in which checker is added can see the document that is yet to be approved before it is visible to others.



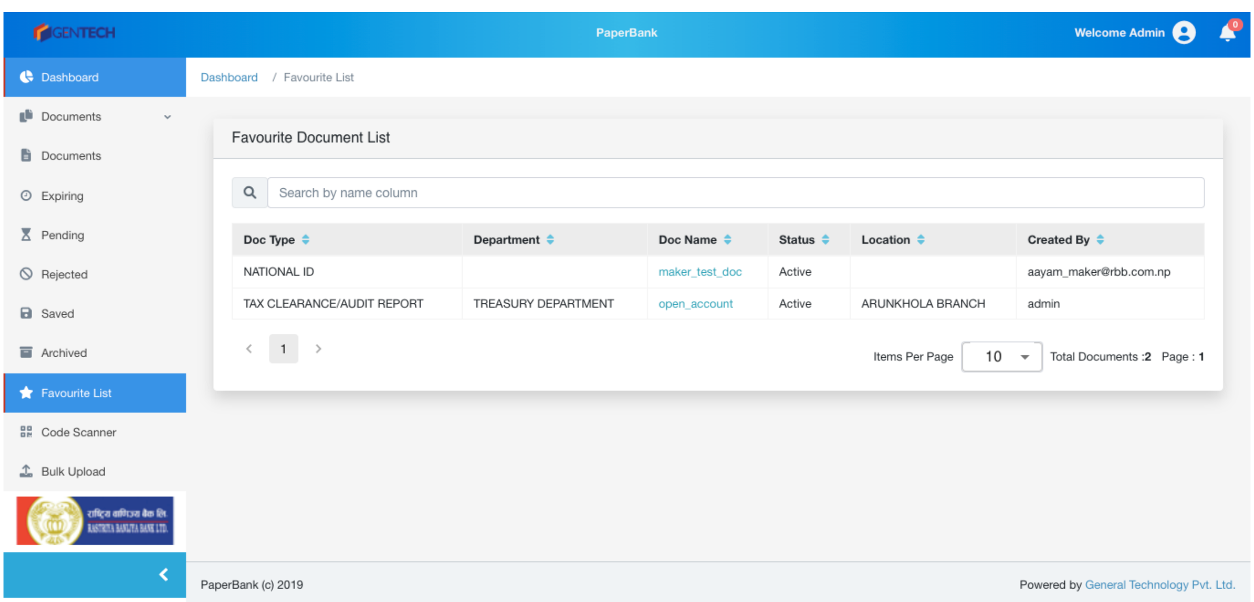
Archived

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



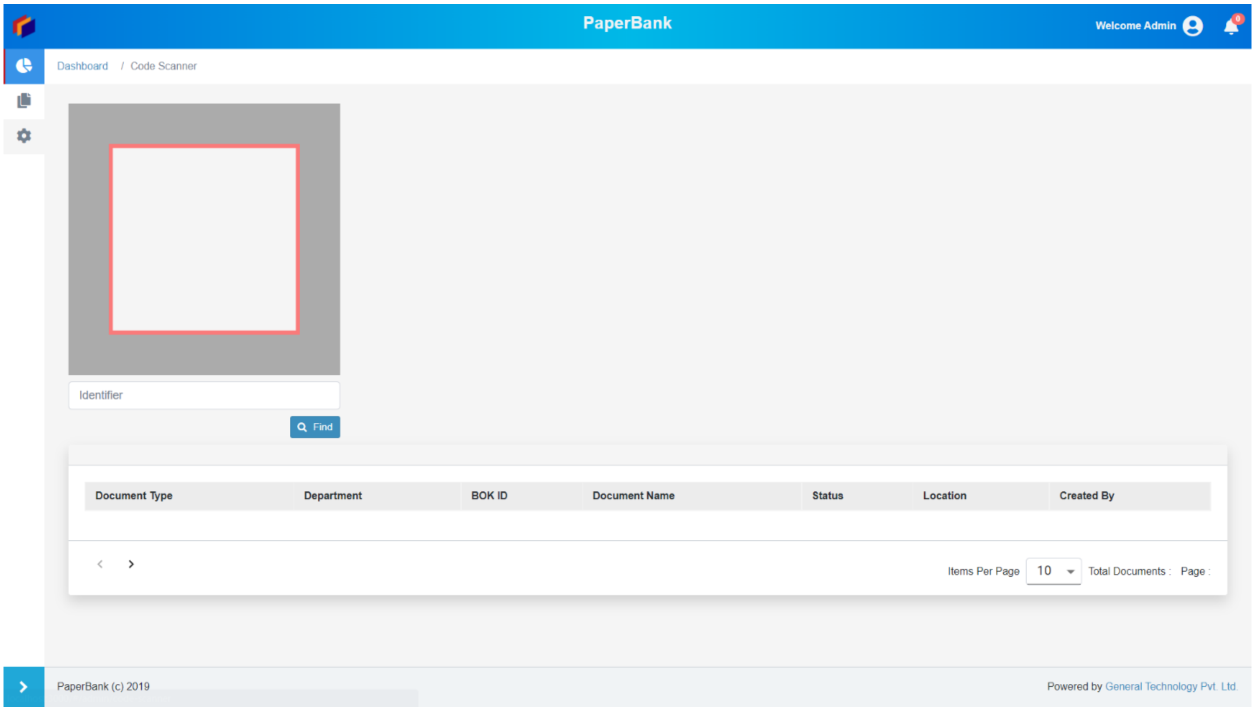
Favorite List

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



Code scanner

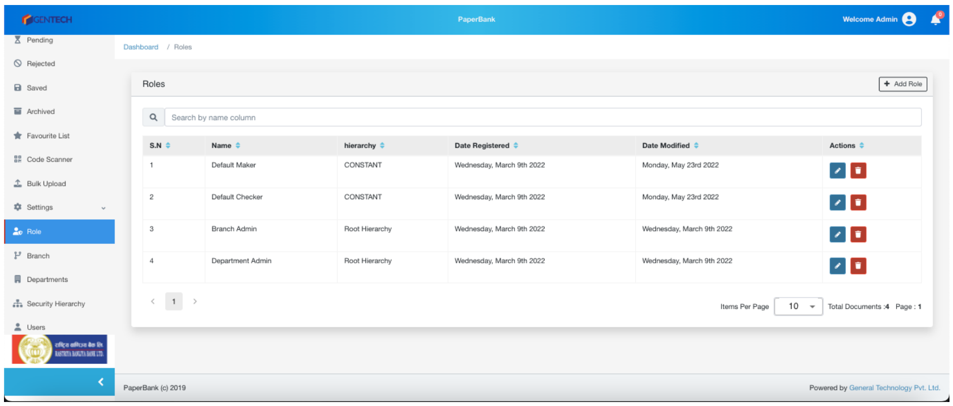
Code scanner scans the QRCode and allows to check out the document that is taken. The checkout status can be seen on the checkout log-in document view page.



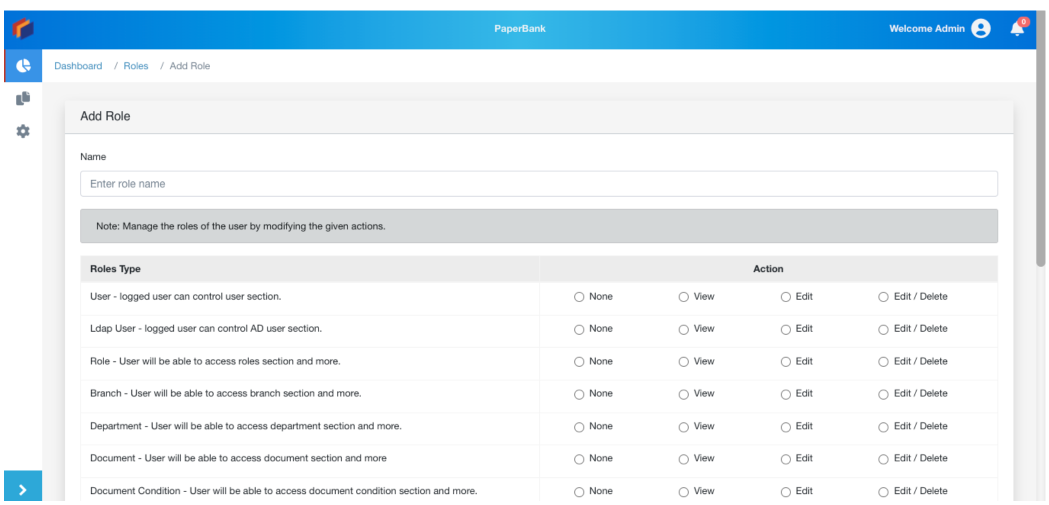
Settings Section

Roles

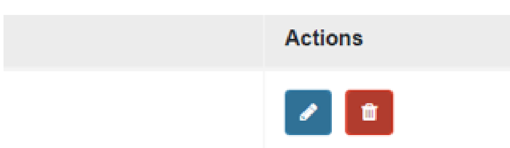
7. Click on the “Roles” tab from the navigation.



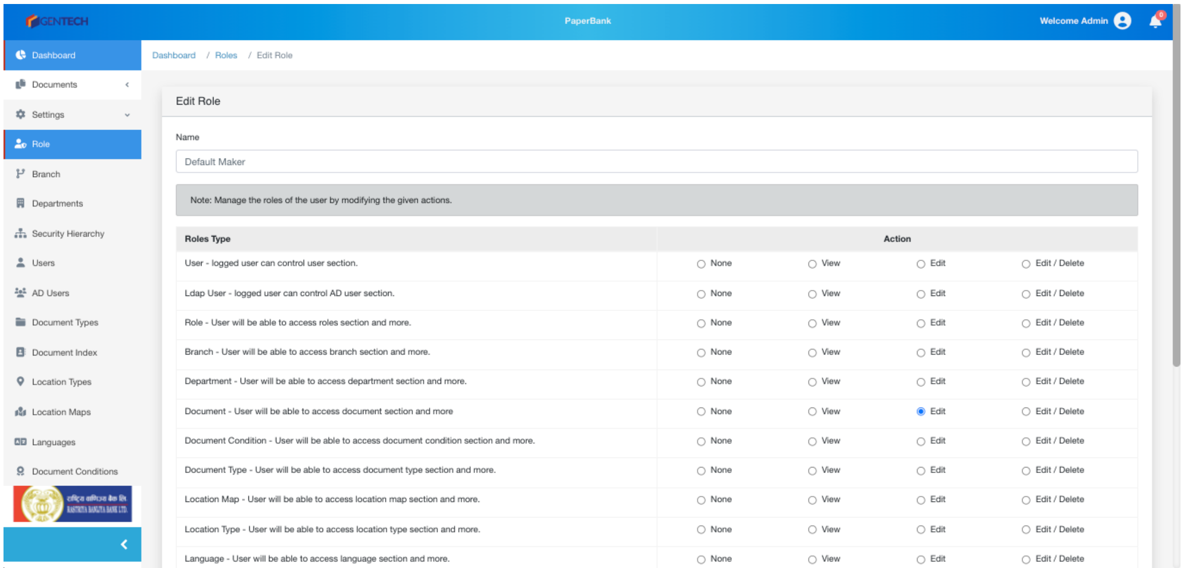
8. Click on the “Add Roles” button to add new roles.
9. Enter the “Name” of the role and click “Submit” to create a role or click “Cancel” to cancel the creation.



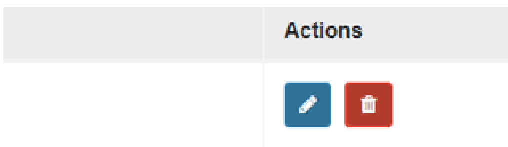
10. Click on “Pencil Icon” to edit or assign permission to the created role.



- After edit is clicked

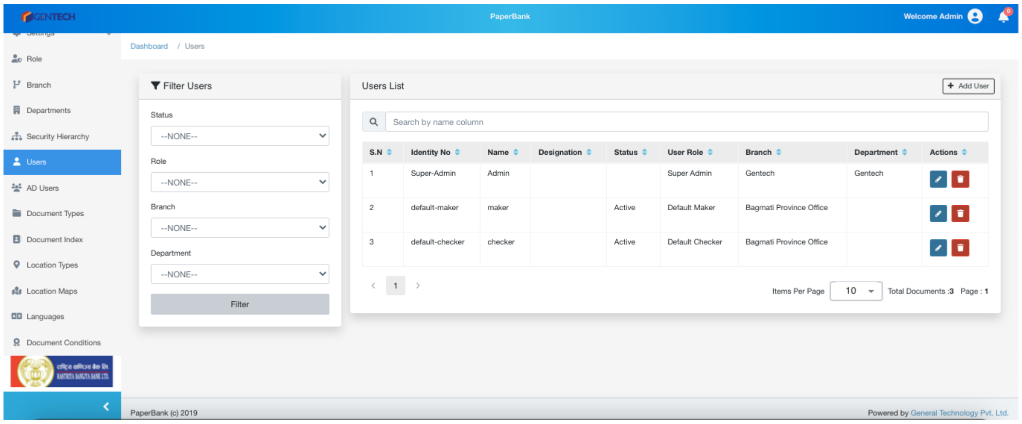


11. Click on “Trash Icon” to delete the created role.

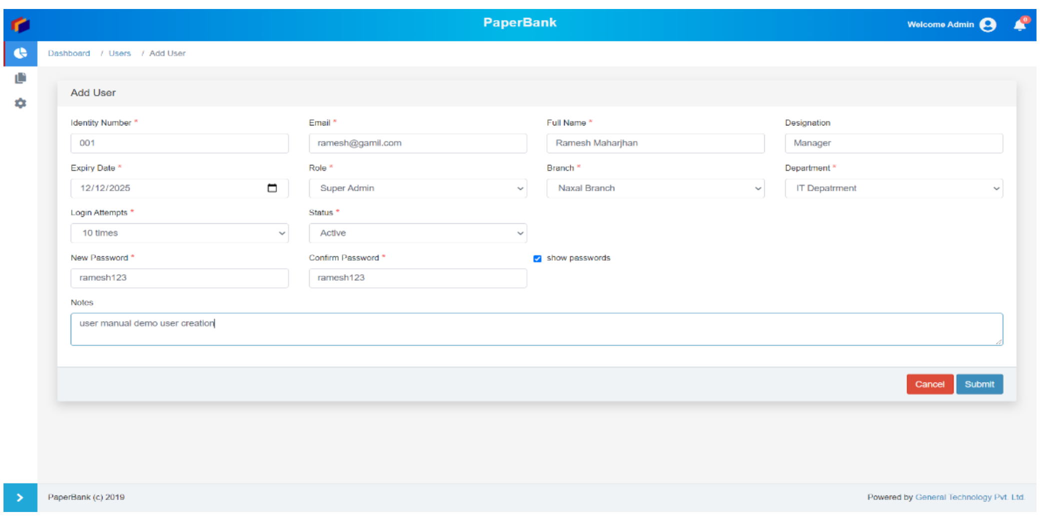


Users

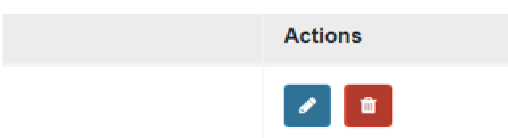
1. Click on the “Users” tab from the navigation.



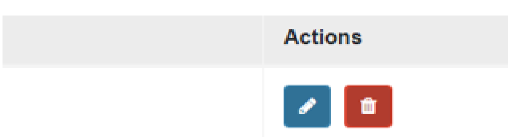
2. Click on the “Add User” button to add a new user.
3. Enter all the required fields which are denoted by (*) in the user add page and click “Submit” to create a user or click “Cancel” to cancel the user creation.



4. Click on “Pencil Icon” to edit the information of the user.

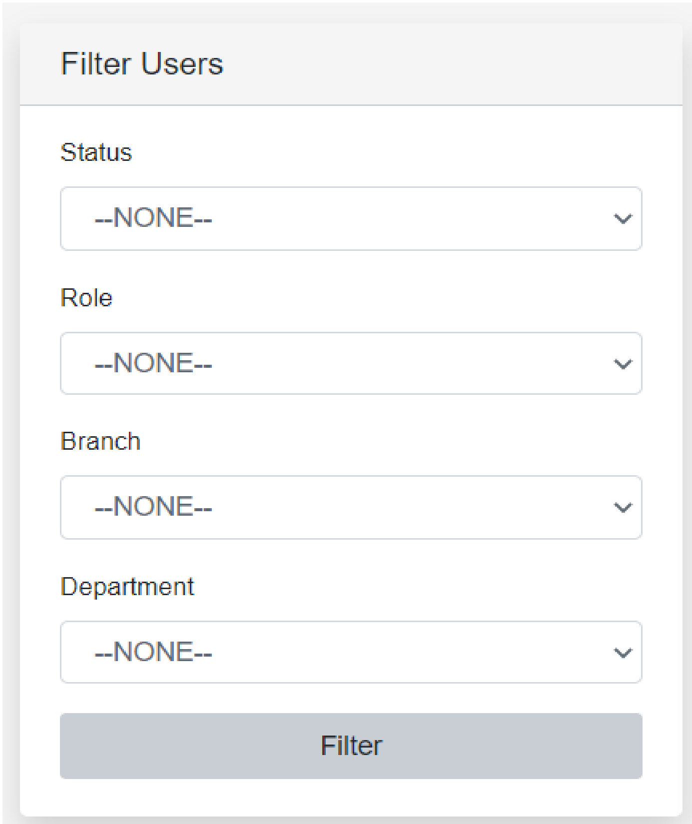


5. Click on “Trash Icon” to delete the created user.



User list filter

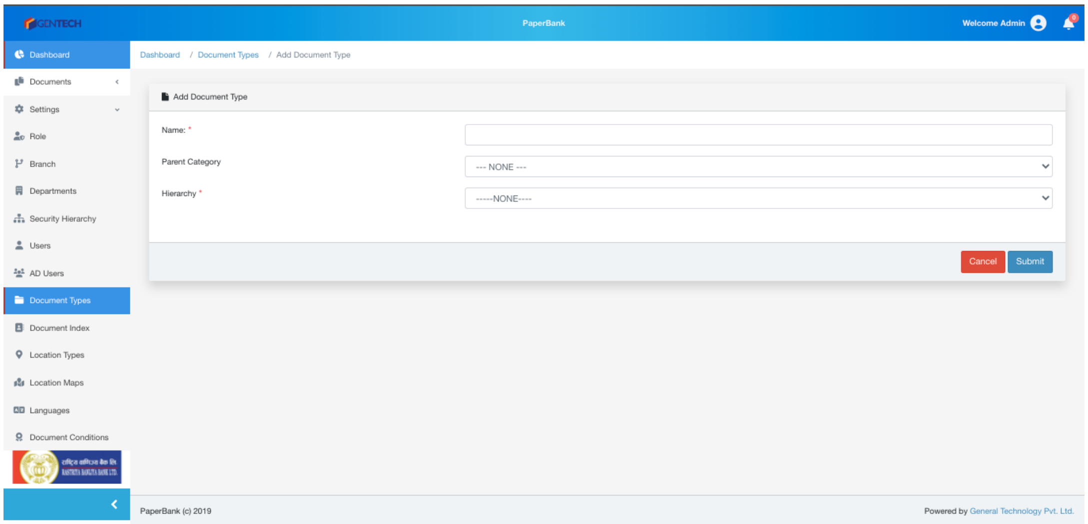
- User can be filtered in various ways



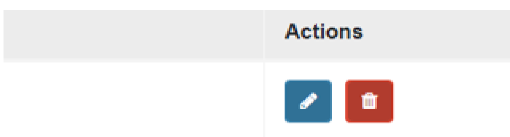
- Filter by the “Status” the user
    - Select the status from the Status dropdown to filter the user by status.
- Filter by the “Role” the user
    - Select the roles from the Role dropdown to filter the user by role.
- Filter by the “Branch” the user
    - Select the branch from the branch dropdown to filter the user by branch.
- Filter by the “Department” the user
    - Select the department from the department dropdown to filter the user by the department.
- After selecting the desired filter options click on the “Filter” button

Document Types

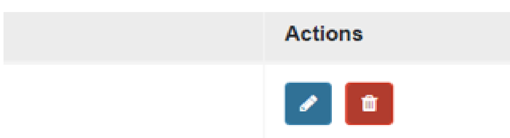
1. Click on the “AD Document Types” tab from the navigation.
2. Click on the “Add Document Type” button to add new document types.
3. Enter all the required fields in the document type add page and click “Submit” to create a document type or click “Cancel” to cancel the document types creation.



4. Parent document types can also be created by selecting the parent types from the dropdown.
5. Click on “Pencil Icon” to edit the information of the document types.

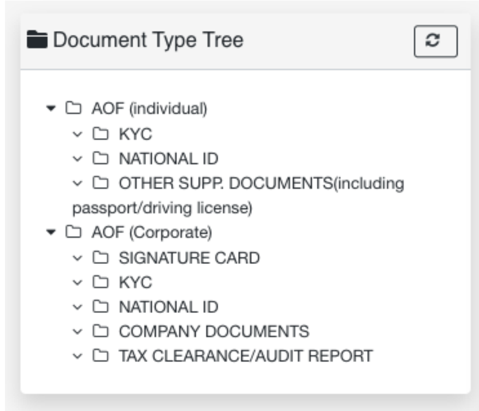


6. Click on “Trash Icon” to delete the created document types.



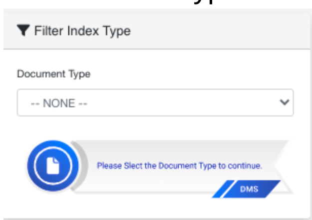
Document Types Hierarchy

- Document Type can be created in a hierarchical order which can be viewed on the Lefthand side of the Document Types list page.
- To expand the department hierarchy, click on the “plus” icon.

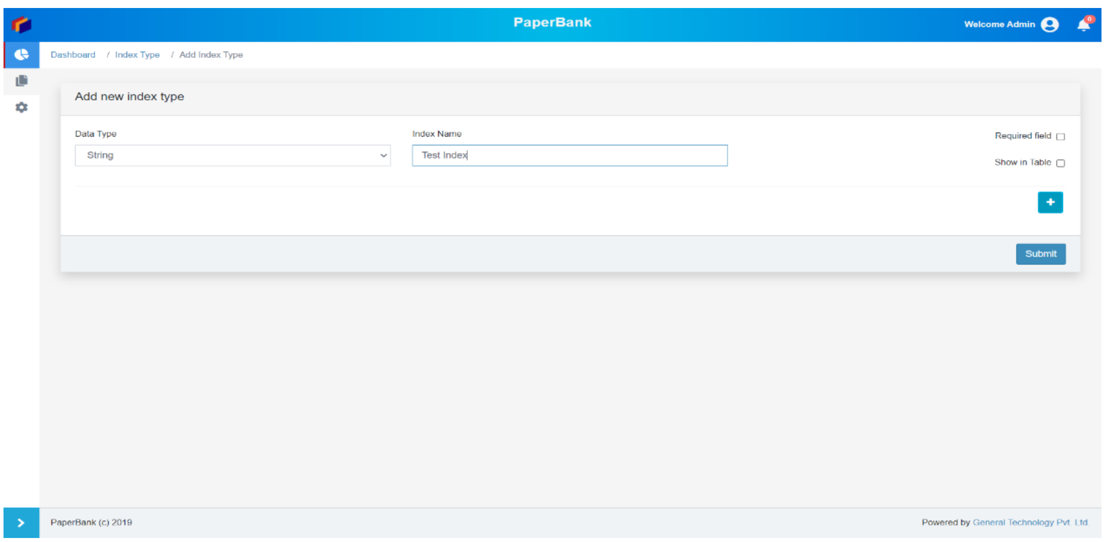


Document Index

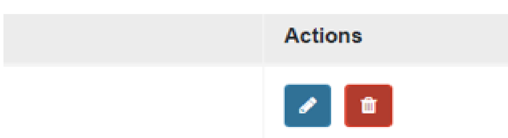
1. Click on the “Document Index” tab from the navigation.
2. Select the Document Types to index from the dropdown.



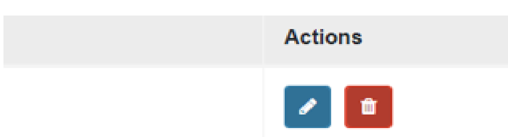
3. Click on the “Add Index” button to add a new index.
4. Select the “Data Types” from the dropdown and enter the “Index name”



5. Click “Submit” to create an index.
6. Click on “Pencil Icon” to edit the information of an index.

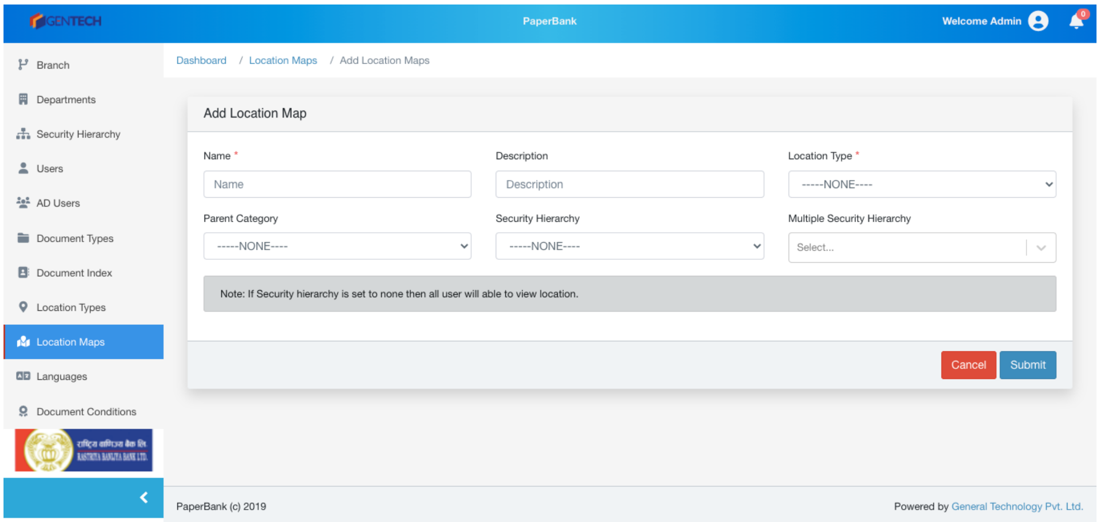


7. Click on “Trash Icon” to delete the created index.

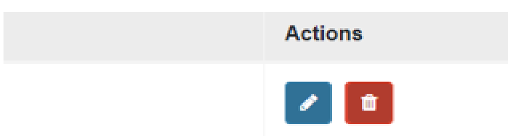


Location Maps

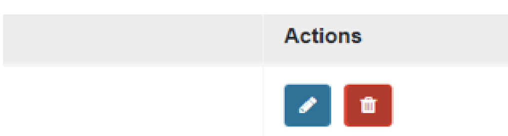
1. Click on the “Location Maps” tab from the navigation.
2. Click on the “Add Location Maps” button to add a new location type.
3. Enter the “Name” of the location map.



4. Select the location types from the dropdown to assign them to a location map.
5. Select the parent category if required.
6. Select the Multiple security hierarchy to add multiple security hierarchies.
7. Click “Submit” to create a location map or click “Cancel” to cancel the location map creation.
8. Click on “Pencil Icon” to edit the location maps.



8. Click on “Trash Icon” to delete the created location maps.



Location Maps Hierarchy

- location maps can be created in a hierarchical order which can be viewed on the Lefthand side of the location maps list page.
- To expand the location maps hierarchy, click on the “down arrow” icon.