User Guide

Author: Dhawanit Bhatnagar

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1. Introduction

The Document Management System (DMS) is a web-based application designed to:

- Allow users to **upload, store, preview, and manage documents** securely.
- Support **controlled ingestion** of documents for AI-based processing.
- Provide **role-based access control (RBAC)** for Admins, Editors, and Viewers.
- Enable Admins to manage **user roles, ingestion permissions**, and overall system activity.

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2. System Requirements

- A modern web browser (Chrome, Firefox, Edge, Safari)
- Stable internet connection
- Account credentials provided by Admin

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3. Accessing the Application

1. Open your browser.
2. Enter the application URL provided by your administrator:
    - *http://<server-address>:5173*
3. You will be directed to the **login page**.

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4. Login and Authentication

1. Enter your **email** and **password**.
2. Click **Login**.
3. If authentication is successful, you will be redirected to the **dashboard**.
4. If you forget your password, contact your Admin for a reset (password reset feature planned in future).

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5. User Roles and Permissions

Role	Permissions
Admin	Full access, manage users, trigger ingestion, edit all documents
Editor	Upload, edit, delete their own documents, view all documents, ingestion (if granted by admin)
Viewer	View and preview documents only

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6. Navigating the Dashboard

The dashboard consists of:

- **Navigation Menu:** Access to documents, ingestion, and (for admins) user management.
- **Content Area:** Displays the page you select from the menu.
- **Logout Button:** To securely exit the system.

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7. Document Management

7.1 Uploading a Document

1. Click on **Documents** in the left menu.
2. Fill in:
   - **Title**
   - **Description**
   - **File** (Supported formats: PDF, DOC, DOCX, TXT)
3. Click **Upload**.
4. Your document appears in the list below.

7.2 Viewing and Previewing a Document

1. In the document list, click **Preview**.
2. A modal window displays:
   - **PDF:** Full preview.
   - **DOC/DOCX:** Text extracted and displayed.
   - **TXT:** Plain text preview.

3. If preview is unsupported, you can **download the file** for viewing.

7.3 Editing a Document

1. Click **Edit** next to your document.
2. Modify **title**, **description**, or **upload a new file**.
3. Click **Update**.
4. Document status will revert to **Uploaded** if the file was ingested before.

7.4 Deleting a Document

1. Click **Delete** next to the document.
2. Confirm the deletion in the pop-up dialog.
3. The document is permanently removed from the system.

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8. Ingestion Management

(Admins and Editors with granted permission only)

8.1 Triggering Ingestion

1. Navigate to **Ingestion Management**.
2. Select a document from the dropdown list.
3. Click **Trigger** and confirm action.
4. The ingestion process starts, and status updates automatically.

8.2 Viewing Ingestion History

- Displays a table of all ingestions with:
  - Document name
  - Status (Pending, In-Progress, Completed, Failed, Cancelled)
  - Triggered by
  - Date/Time
- You can filter logs by **status**, **search document title**, and **paginate results**.

8.3 Retrying Failed or Cancelled Ingestion

1. In the ingestion history table, find a failed/cancelled record.
2. Click **Retry Ingestion**.
3. The document will be reprocessed for ingestion.

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9. User Management (Admin Only)

9.1 Viewing Users

- Admins can view all non-admin users (Editors, Viewers).

9.2 Changing User Role

- Click the role dropdown next to a user.
- Select **Editor** or **Viewer**.
- Confirm the action in the pop-up.

9.3 Granting or Revoking Ingestion Permissions

- Click the **Grant/Revoke Ingestion** button.
- Confirm the action in the pop-up dialog.

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10. Notifications (Future Feature)

- Email or in-app alerts for:
  - Completed or failed ingestion.
  - New document uploads.
  - User role updates.
- Planned implementation using WebSockets and email service providers.

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11. Best Practices for Users

- Use **descriptive titles** and **meaningful descriptions** for documents.
- Avoid uploading duplicate or irrelevant files.
- Log out after using the system, especially on shared computers.
- Report any ingestion errors to Admin for troubleshooting.

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12. Support and Contact

For help:

- Contact the system administrator via email: **dhawanitbhatnagar@gmail.com**.
- Provide:
    - Your username
    - Problem description
    - Screenshots (if possible)