

General DMS

User Manual

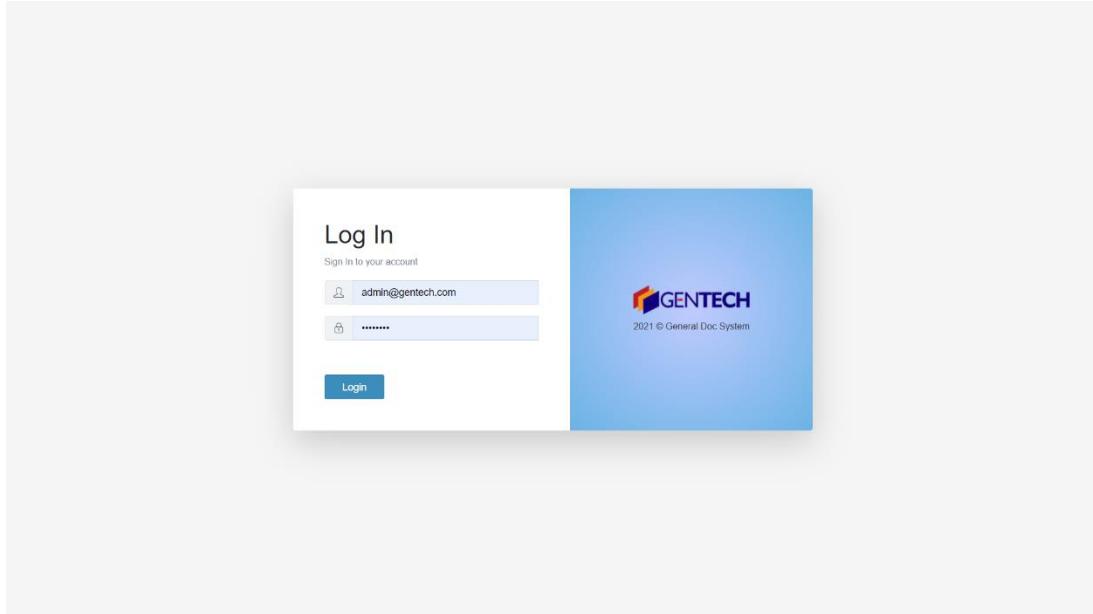


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User Login

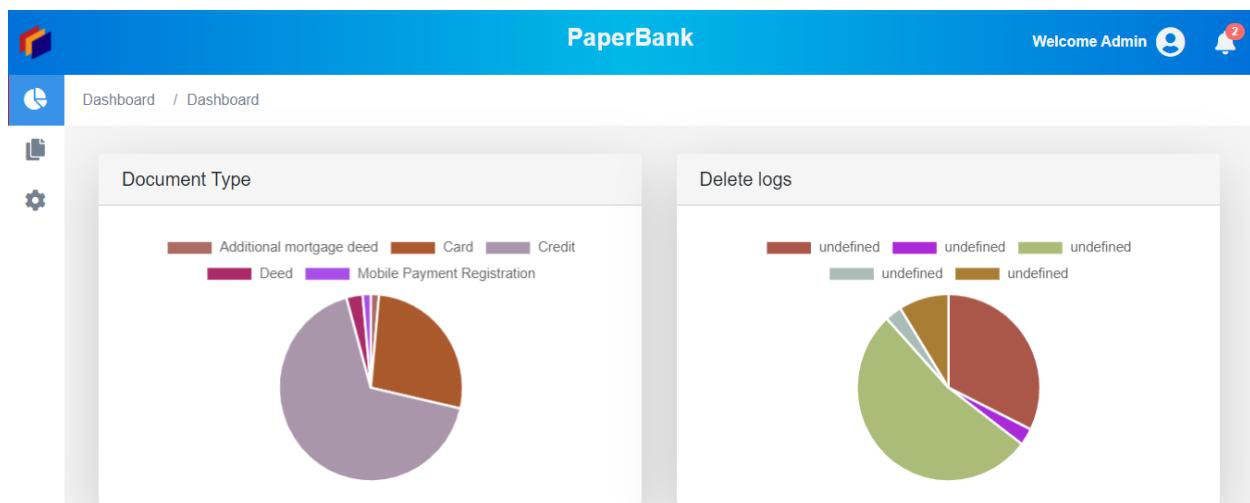
1. Enter the valid “Username” and “Password”
2. Click the “Login” button to verify the email and password.



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.

The screenshot shows the 'Add Document' interface. On the left is a sidebar with navigation links: Dashboard, Documents (selected), Expiring, Pending, Rejected, Saved, Archived, Favourite List, Code Scanner, Bulk Upload, and Settings. The main area has tabs for 'Add Document' and 'PaperBank'. It contains fields for Document Type (dropdown, value: ---NONE---), Tags (text input: Press Tab to add tags), Identifier (text input: DOC-2022-05-23-1653281287468), Document Name (text input: Document Name), Expiry Date (date input: mm/dd/yyyy), Language (dropdown, value: ---NONE---), Status (dropdown, value: Active), Location Map (dropdown, value: ---NONE---), Department (dropdown, value: Gentech), Security Level (dropdown, value: ---NONE---), Checker (dropdown, value: ---NONE---), Security Hierarchy (dropdown, value: ---NONE---), and checkboxes for Encryption Files, Quick OCR, Require OTP Verification, and Archive Now. At the bottom are 'Cancel' and 'Submit' buttons.

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

AOF (individual)	CENTRAL OPERATIONS DEPARTMENT	bukd	Active	admin		
------------------	-------------------------------	------	--------	-------	---	---

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.

Document Information



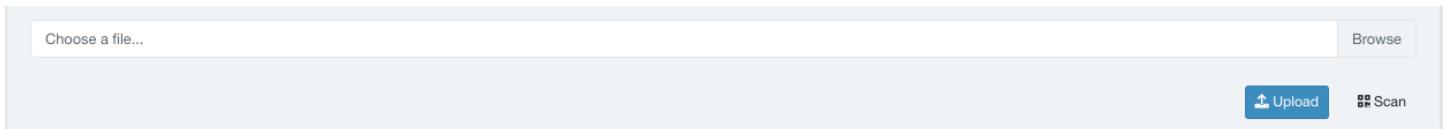
 Print this QR out!!

Identifier	DOC-2022-05-23-1653286237945
Feature	No feature available
Document Name	open_account
Security Hierarchy	Super-001
Approval	 Approved
Archived	 Not Archived

- b. File Upload in the document.
- Click on the “Browse” button to reveal an upload pop-up.



- Choose a file by clicking the “Browse” button.
- Click the “Submit” button to upload a file.



- c. Preview File and Images
- Select the file from the “Select File” button.
 - Click on the “View Image” button to view the image attached to the document.



d. Add To Favorite Section and archive section.

- Add to Favourite List ★
- Archived Now ★

Audit log

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

Document Access Logs			
Access Type	Date	Time	Accessed By
OPEN	Tue Nov 02 2021	09:46:20 GMT+0545 (Nepal Time)	Admin
OPEN	Tue Nov 02 2021	10:07:45 GMT+0545 (Nepal Time)	Admin
OPEN	Tue Nov 02 2021	10:14:48 GMT+0545 (Nepal Time)	Admin
OPEN	Tue Nov 02 2021	11:17:01 GMT+0545 (Nepal Time)	Admin
OPEN	Tue Nov 02 2021	11:18:32 GMT+0545 (Nepal Time)	Admin

[Download Report](#)

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 user to provide from the radio button and click submit or add other users.

Audit Logs Checkout Logs Hourly Access

Provide Hourly Access

Select Attachment *

6TkeKOOp.jpeg 5WeGfr2.jpeg

Duration * Duration Type *

1 Minute

Check Users

Existing Users Other Users

Submit

The screenshot shows a 'Hourly Access' interface. It has a table with one row. The first column is labeled 'User' and contains 'rupesh@generaltechnology.com.np'. The second column is labeled 'URL' and contains two small blue rectangular buttons with icons: a magnifying glass and a double arrow.

Checkout logs

Document this is returned can be seen in this tab.

The screenshot shows the 'Checkout Logs' tab. At the top, there are three tabs: 'Audit Logs', 'Checkout Logs' (which is selected and highlighted in grey), and 'Hourly Access'. Below the tabs is a yellow header bar with the text 'Checkout information'. Underneath is a table with columns: 'Name', 'Checkout Date', 'Checkin Date', 'Description', and 'Status'. There are no rows of data in the table.

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.

The screenshot shows the 'Expiring' tab. On the left is a sidebar with navigation options: 'Dashboard', 'Documents' (with sub-options 'Documents', 'Expiring' which is selected and highlighted in blue, 'Pending', 'Rejected', 'Saved', 'Archived', 'Favourite List', 'Code Scanner', and 'Bulk Upload'), and a logo for 'KANTIPUR MARGA BANK LTD.'. The main content area has a search bar with '1 week/s for the expiry of the documents'. Below it is a table titled 'Expired Document List' with a 'Add Document' button. The table has columns: 'Doc Type', 'Department', 'Document Name', 'Status', 'Location', and 'Created By'. One row is shown: 'TAX CLEARANCE/AUDIT REPORT', 'TREASURY DEPARTMENT', 'open_account', 'Active', 'ARUNKHOLA BRANCH', and 'admin'. At the bottom, there are navigation arrows, a 'Items Per Page' dropdown set to '10', and a 'Total Documents : Page :'. The footer includes 'PaperBank (c) 2019' and 'Powered by General Technology Pvt. Ltd.'

Pending

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

GENTECH PaperBank Welcome aone

Dashboard / Pending Documents

Documents

Pending Document List

Doc Type	Department	Document Name	Status	Location	Created By	Action
		open_account		ARUNKHOLA BRANCH		

< 1 >

Items Per Page 10 Total Documents :1 Page :1

RASTRIYA BANKA LTD.

PaperBank (c) 2019 Powered by General Technology Pvt. Ltd.

Archived

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

The screenshot shows the PaperBank interface with a blue header bar. On the left, there's a sidebar with various document management options like Dashboard, Documents, Expiring, Pending, Rejected, Saved, and Archived (which is highlighted). Below the sidebar is the logo of 'RASTRIYA BANKA BANK LTD'. The main content area is titled 'Archived Document List' and contains a table with columns: Doc Type, Department, Document Name, Status, Location, and Created By. The table lists several entries, all marked as 'Active' in the status column. The data includes documents from departments like Central Clearing, DEMAT/ASBA, RECOVERY DEPARTMENT, and TRADE AND ADMINISTRATIVE DEPARTMENT, located across branches such as HARINAGARA BRANCH, AMARAPURI BRANCH, ATTARIYA BRANCH, BANEPA BRANCH, and AURABI BRANCH, all created by the user 'admin'.

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	BANEPA 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	BANEPA BRANCH	maker@ctznbank.com
AOF (Corporate)	RECOVERY DEPARTMENT	loan form	Active	AURABI BRANCH	maker@ctznbank.com
AOF (Individual)	Centralised Account Opening	loan form	Active		admin
AOF (Individual)	TRADE AND ADMINISTRATIVE DEPARTMENT	loan form	Active		admin

Favorite List

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

The screenshot shows the PaperBank interface with a blue header bar. On the left, there's a sidebar with various document management options like Dashboard, Documents, Expiring, Pending, Rejected, Saved, and Archived (which is highlighted). Below the sidebar is the logo of 'RASTRIYA BANKA BANK LTD'. The main content area is titled 'Favourite Document List' and contains a table with columns: Doc Type, Department, Doc Name, Status, Location, and Created By. The table lists two entries. The first entry is 'maker_test_doc' created by 'aayam_maker@rbb.com.np' under NATIONAL ID. The second entry is 'open_account' created by 'admin' under TAX CLEARANCE/AUDIT REPORT under TREASURY DEPARTMENT. At the bottom of the page, there are pagination controls (page 1), a dropdown for 'Items Per Page' set to 10, and a message indicating 'Total Documents :2 Page : 1'.

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

Code scanner

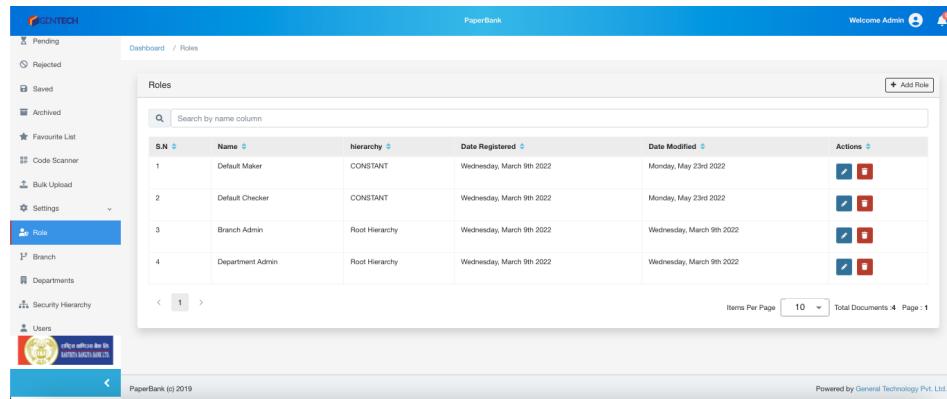
Code scanner scans the QRCode and allows to check out the document that is taken. The checkout status can be seen on the checkout log-in document view page.

The screenshot shows the PaperBank application interface. At the top, there is a blue header bar with the PaperBank logo, a 'Welcome Admin' message, and a notification bell icon. Below the header, the main content area has a left sidebar with icons for Dashboard, QR Scanner, and Settings. The main panel features a large red-bordered box for scanning a QR code. Below this is a search bar with an 'Identifier' input field and a 'Find' button. To the right is a table with columns: Document Type, Department, BOK ID, Document Name, Status, Location, and Created By. At the bottom of the main panel are navigation arrows, a 'Items Per Page' dropdown set to 10, and a 'Total Documents : Page' selector. The footer contains a copyright notice 'PaperBank (c) 2019' and a 'Powered by General Technology Pvt. Ltd.' link.

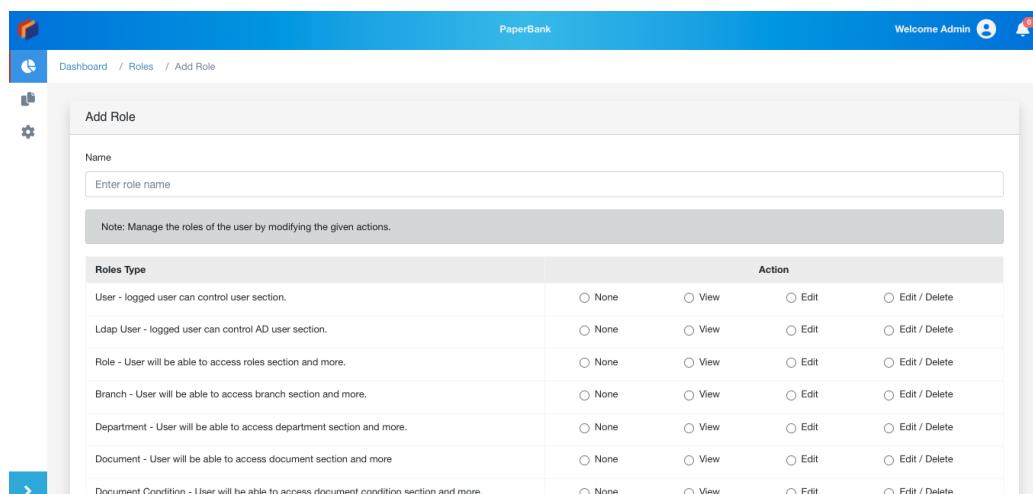
Settings Section

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

Roles Type	Action
User - logged user can control user section.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Ldap User - logged user can control AD user section.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Role - User will be able to access roles section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Branch - User will be able to access branch section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Department - User will be able to access department section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Document - User will be able to access document section and more.	<input type="radio"/> None <input type="radio"/> View <input checked="" type="radio"/> Edit <input type="radio"/> Edit / Delete
Document Condition - User will be able to access document condition section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Document Type - User will be able to access document type section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Location Map - User will be able to access location map section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Location Type - User will be able to access location type section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete
Language - User will be able to access language section and more.	<input type="radio"/> None <input type="radio"/> View <input type="radio"/> Edit <input type="radio"/> Edit / Delete

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



Users

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

PaperBank

Welcome Admin

Dashboard / Users

Filter Users

Status: --NONE--

Role: --NONE--

Branch: --NONE--

Department: --NONE--

Filter

Users List

S.N.	Identity No.	Name	Designation	Status	User Role	Branch	Department	Actions
1	Super-Admin	Admin		Active	Super Admin	Gentech	Gentech	
2	default-maker	maker		Active	Default Maker	Bagnali Province Office		
3	default-checker	checker		Active	Default Checker	Bagnali Province Office		

Items Per Page: 10 Total Documents: 3 Page: 1

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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.

PaperBank

Welcome Admin

Dashboard / Users / Add User

Add User

Identity Number *: 001

Email *: ramesh@gmail.com

Full Name *: Ramesh Maharjan

Designation: Manager

Expiry Date *: 12/12/2025

Role *: Super Admin

Branch *: Naxal Branch

Department *: IT Department

Login Attempts *: 10 times

Status *: Active

New Password *: ramesh123

Confirm Password *: ramesh123

Notes: user manual demo user creation

Cancel Submit

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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

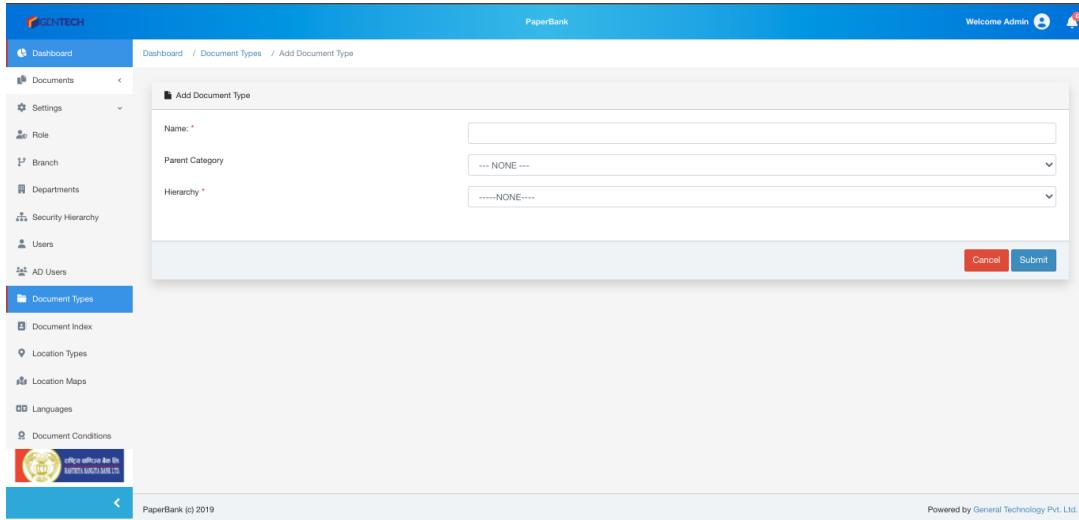
The image shows a 'Filter Users' dialog box with four dropdown menus and a 'Filter' button. The dropdowns are labeled 'Status', 'Role', 'Branch', and 'Department', and each has an option '--NONE--' selected. A large 'Filter' button is at the bottom.

Filter Type	Value
Status	--NONE--
Role	--NONE--
Branch	--NONE--
Department	--NONE--

- 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.



The screenshot shows the 'Add Document Type' page of the PaperBank application. The left sidebar has a 'Document Types' tab selected. The main area has a title 'Add Document Type'. It contains three input fields: 'Name:' with a required asterisk, 'Parent Category' with a dropdown menu showing '...NONE...', and 'Hierarchy' with a dropdown menu showing '.....NONE....'. At the bottom right are 'Cancel' and 'Submit' buttons.

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.

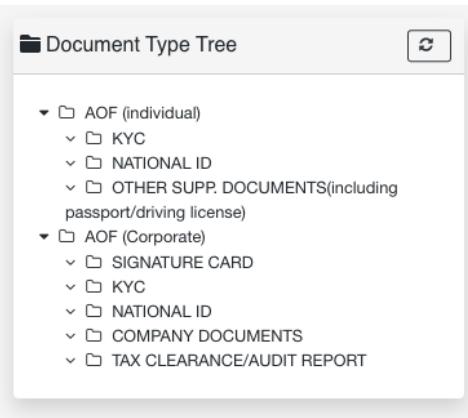


6. Click on “Trash Icon” to delete the created document types.



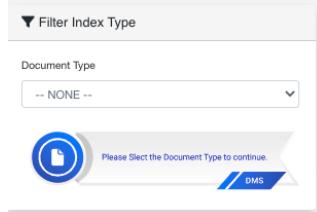
Document Types Hierarchy

- 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

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



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

The screenshot shows a form titled "Add new index type" under the "PaperBank" header. It has fields for "Data Type" (set to "String") and "Index Name" (set to "Test Index"). There are checkboxes for "Required field" and "Show in Table". At the bottom are "Submit" and "Cancel" buttons.

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



- 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.

The screenshot shows the 'Add Location Map' page. On the left is a sidebar with various navigation options like Branch, Departments, Security Hierarchy, Users, AD Users, Document Types, Document Index, Location Types, Location Maps (which is selected and highlighted in blue), Languages, and Document Conditions. The main area has tabs for Dashboard, Location Maps, and Add Location Maps. The 'Add Location Map' form contains fields for Name, Description, Location Type (set to '----NONE----'), Parent Category (set to '----NONE----'), Security Hierarchy (set to '----NONE----'), and Multiple Security Hierarchy (with a dropdown menu). A note at the bottom says: 'Note: If Security hierarchy is set to none then all user will able to view location.' At the bottom right are 'Cancel' and 'Submit' buttons.

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.

