User Manual

Document management system

Document Management system

1. Introduction

1.1 Intended Leadership

This manual has been written keeping in mind the end user, who uses the application and which mainly acts as a reference.

1.2 Applicability Statement

The current version of the software is 1.0. With the new requirements coming up and with each release of the products, the release versions are likely to change.

1.3 Purpose

1.3.1 Purpose of the manual

This manual contains information for establishing your work using this software. Use this manual as a self-learning textbook. It describes the various functions that will be provided in the software and also the hardware and software requirements in the system. It will guide you through each of the major facilities within Document Management System. This document will help you to use this software in an optimised manner.

1.3.2 Purpose of the software

The purpose of the software is to manage all the inward and outward documents related to Accounts Department of IIT INDORE. It will help to make the current system faster and will be easily accessible to each and every individual at IIT Indore. It will help to easily track and check the progress of your Document.

1.4 How to use this document

This manual is designed to get you up and using Document Management System web service. If you are new to this service, we suggest you read through this publication while using the service. It gives step by step description as to how the whole web service works and also gives you step by step procedure to use different functions of the web service.

1.5 Problem reporting instructions

In case you encounter any problem in using the software and you are not able to overcome it, please report the issue on the given link:

https://github.com/mb-14/cse258-iiti-group4/

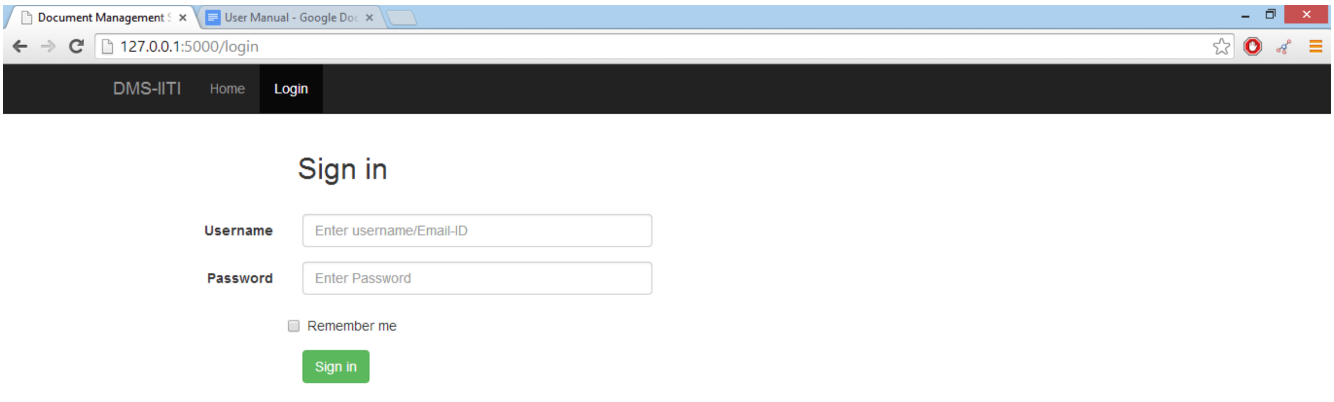
We will help you as soon as possible.

2. Getting Started

The Document Management system has various functionalities mentioned below:

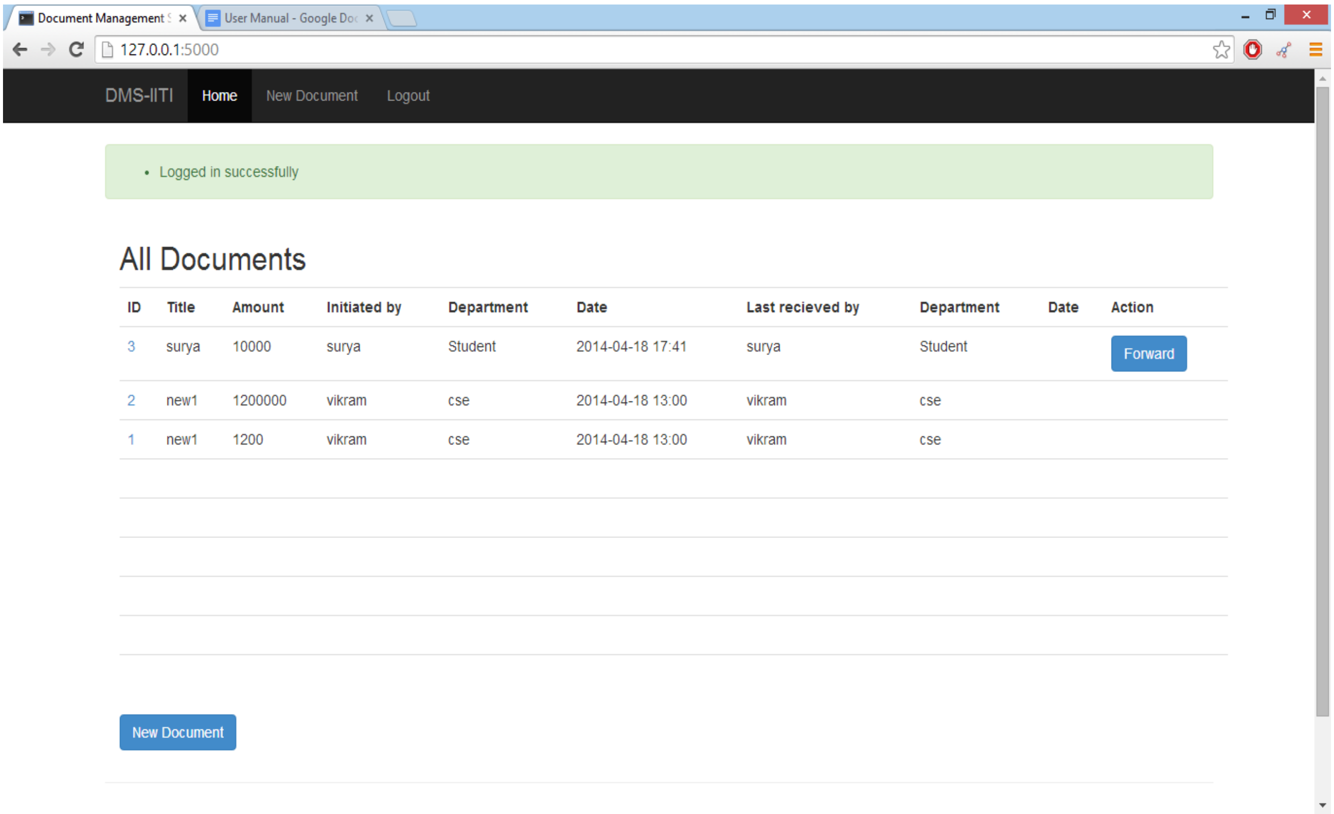
2.1 Login

The following is the login page.



Login to the inward outward portal through your username/email ID following your password.
There is also a "Remember me" checkbox, which on checking keeps you logged in.

After you have successfully logged in, you will be forwarded to your home page. If the login credentials were wrong it will show you the error message.



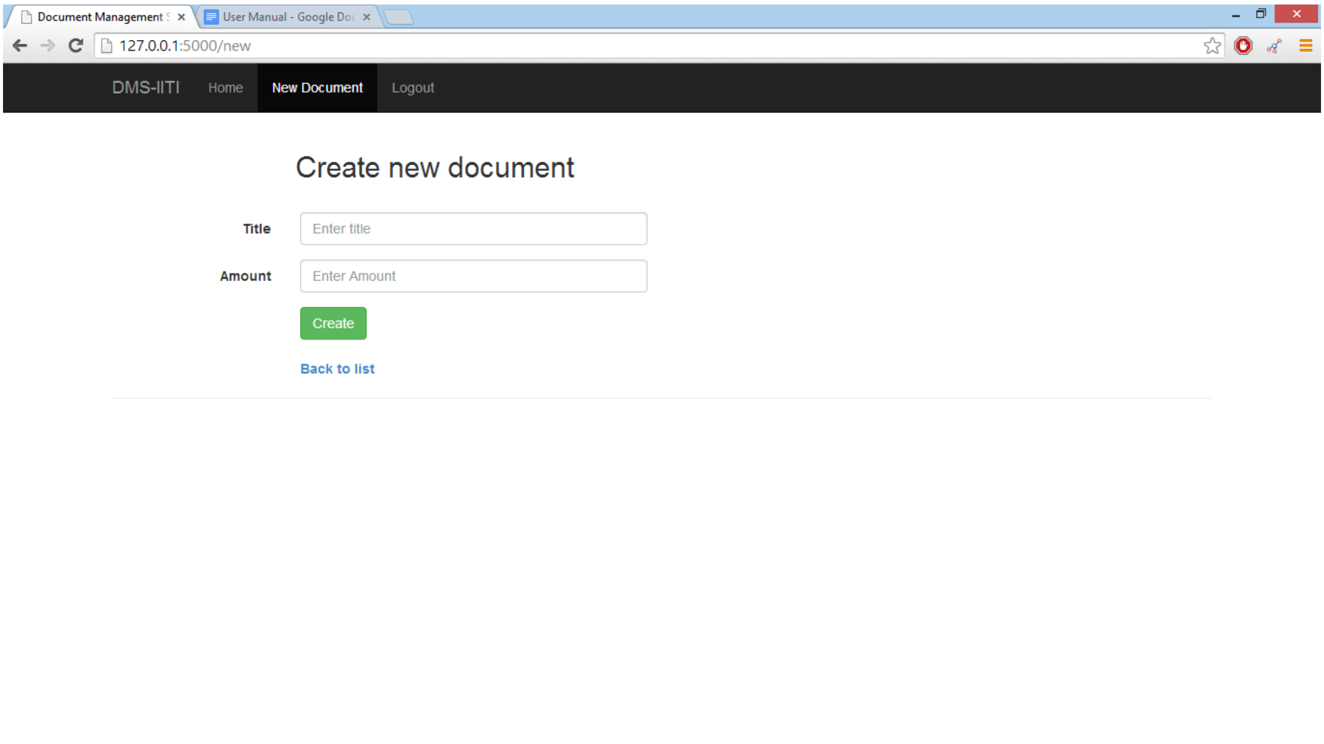
This is the Inward Outward system, where the documents or applications can be viewed, forwarded and accepted accordingly.

The Home page gives the details of all the documents/applications you have received, created or forwarded.

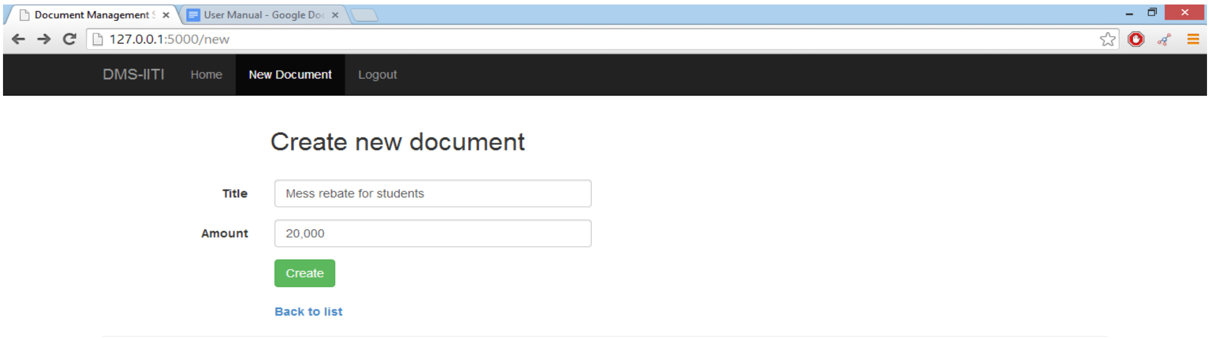
This page gives the following details of each document:
ID
Title
Amount
Initiated By
Department of the person who created the document
Date and Time
Last received by
Department of the person who last received it
Action to be performed on the document

2.2 Creating a new Document

Click the “New Document” tab on the navigation bar at the top.
This redirects you to the following page:



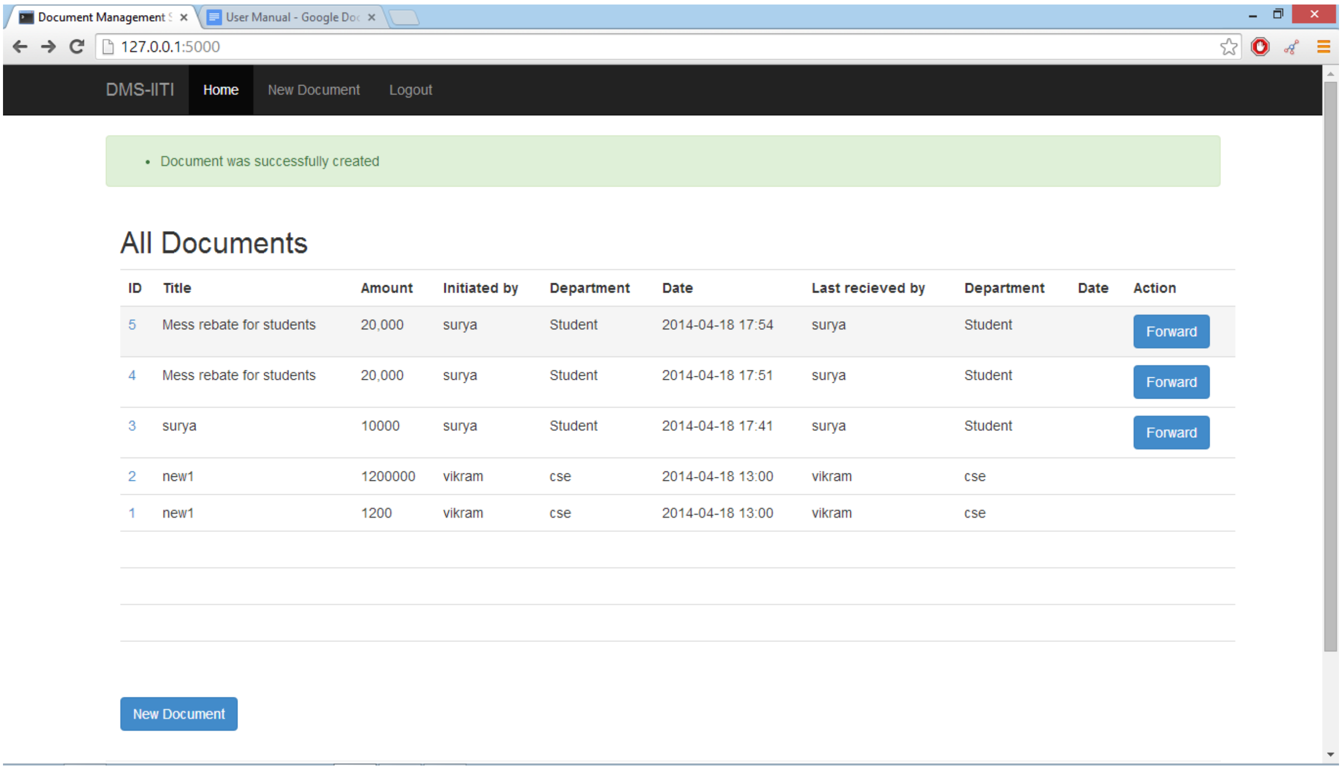
Enter the details of the new document to be created.



The details needed to be specified are title of the document, and the amount of the corresponding transaction.

If you wish to go back to the list from the page of creating the new document, there is a link at the bottom saying “Back to the list” which on clicking redirects you to the page containing the details of the previous documents/applications.

Once, a document is created the list of the documents is updated with the details of the newly created document.

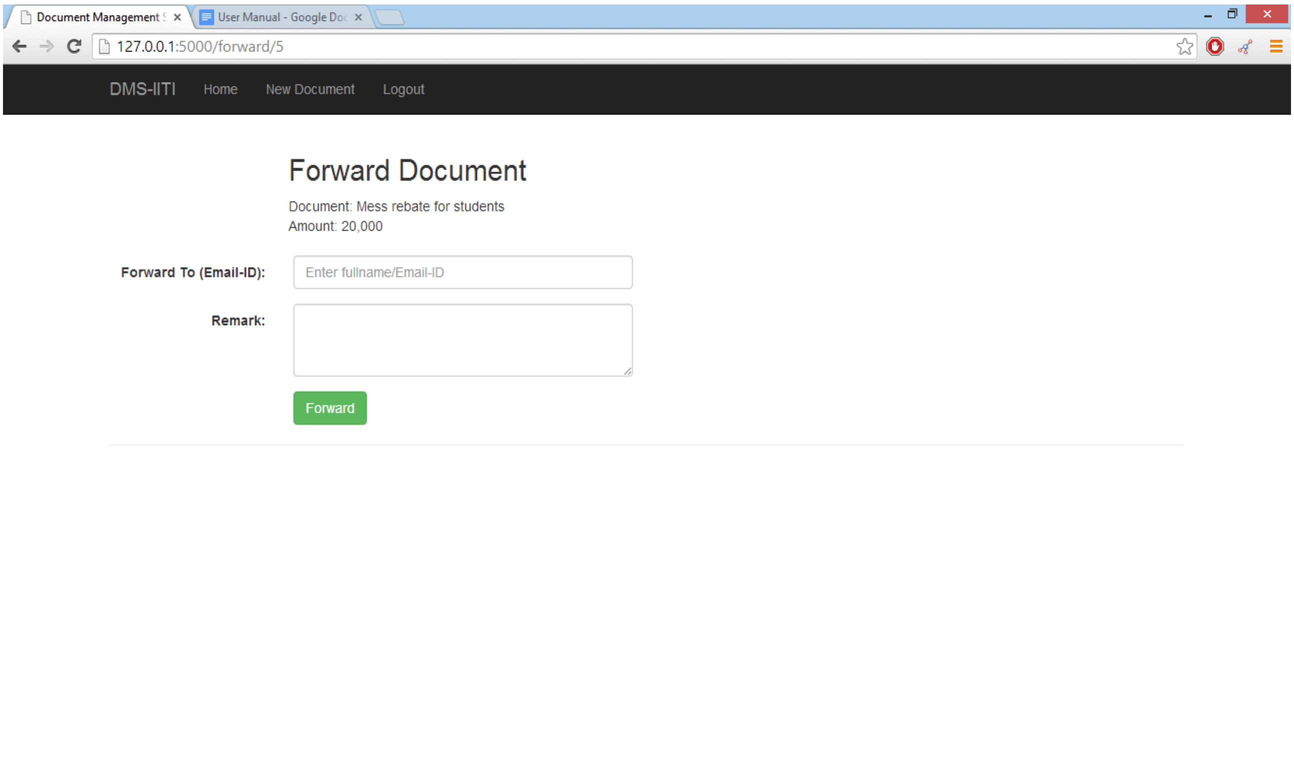


A new document can also be created using the New Document tab provided at the bottom of the Home page.

2.3 Forward

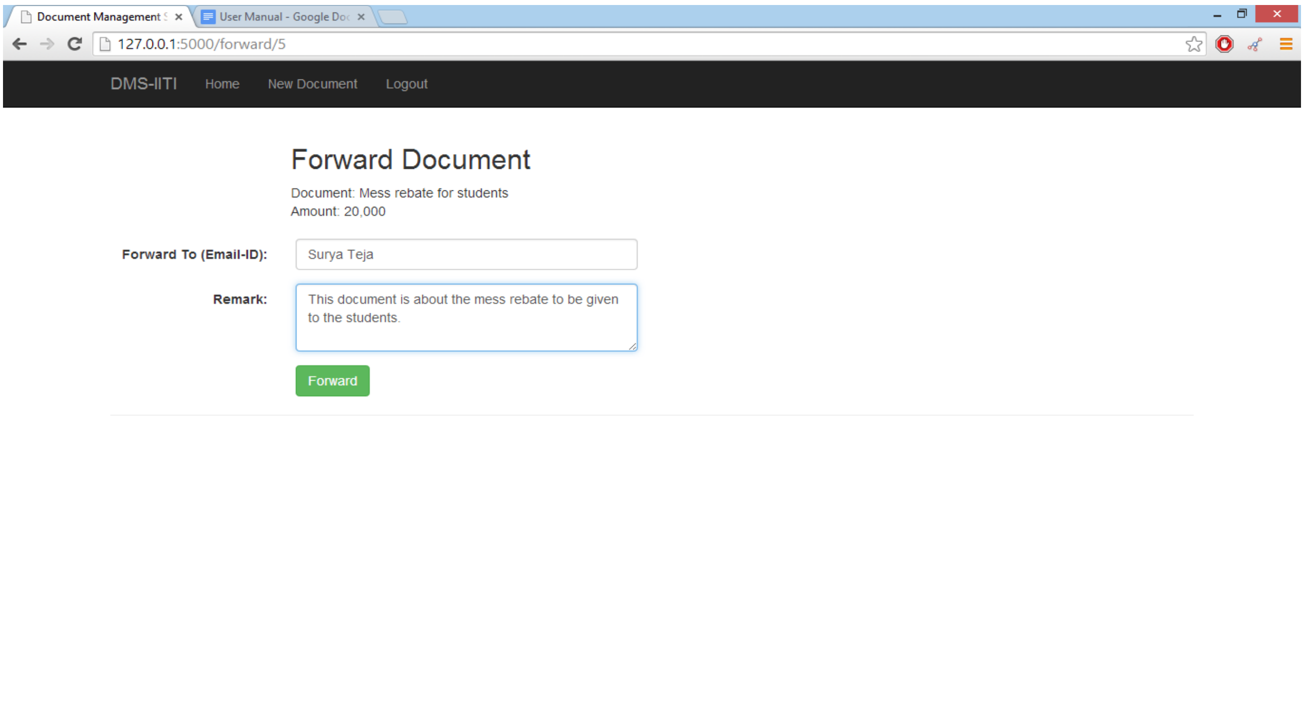
Each document in the list has an action that can be performed by the current user. A document can either be forwarded or accepted.

To forward a document, click the "Forward" tab across the details of the document, which directs you to the following page.



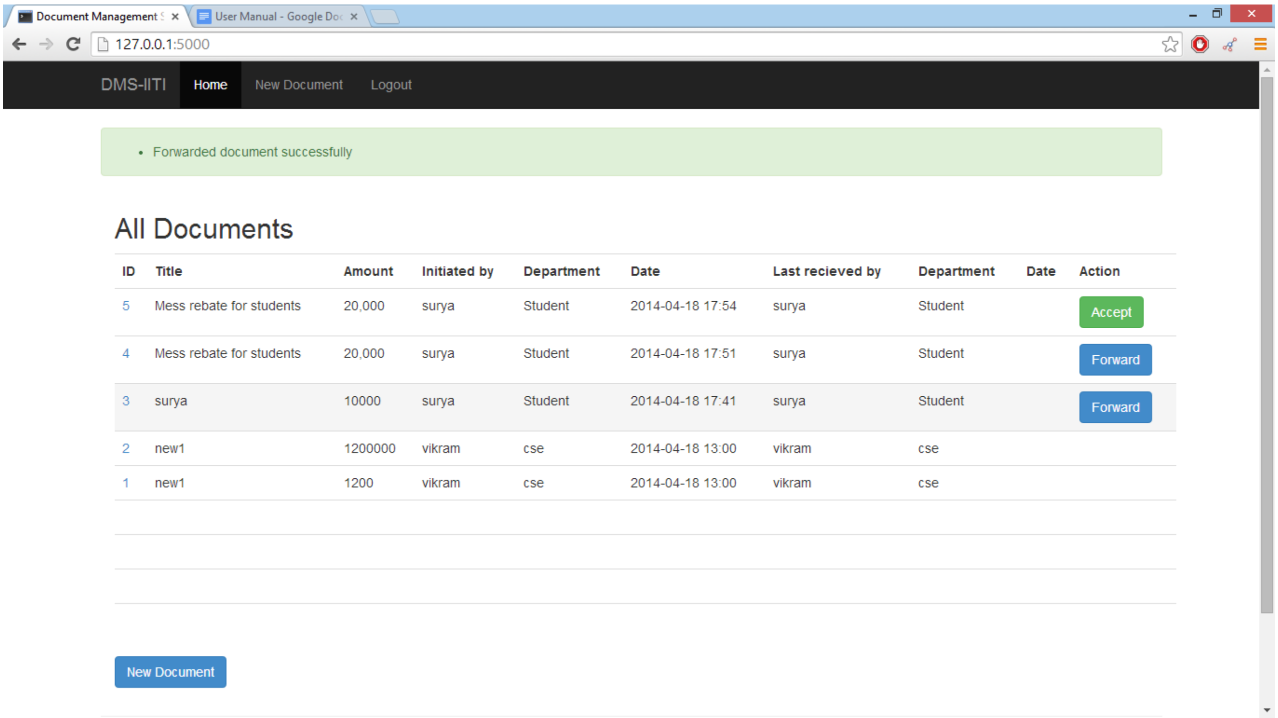
Here the user is required to give in the details of the user whom, the current user wants to forward the document to.

The details to be filled are the full name/ email ID of the user, to whom the document is to be forwarded and any remark about the document.



Then clicking the Forward tab at the bottom forwards the document to the specified user, thus updating the list of the documents in that particular user's account.

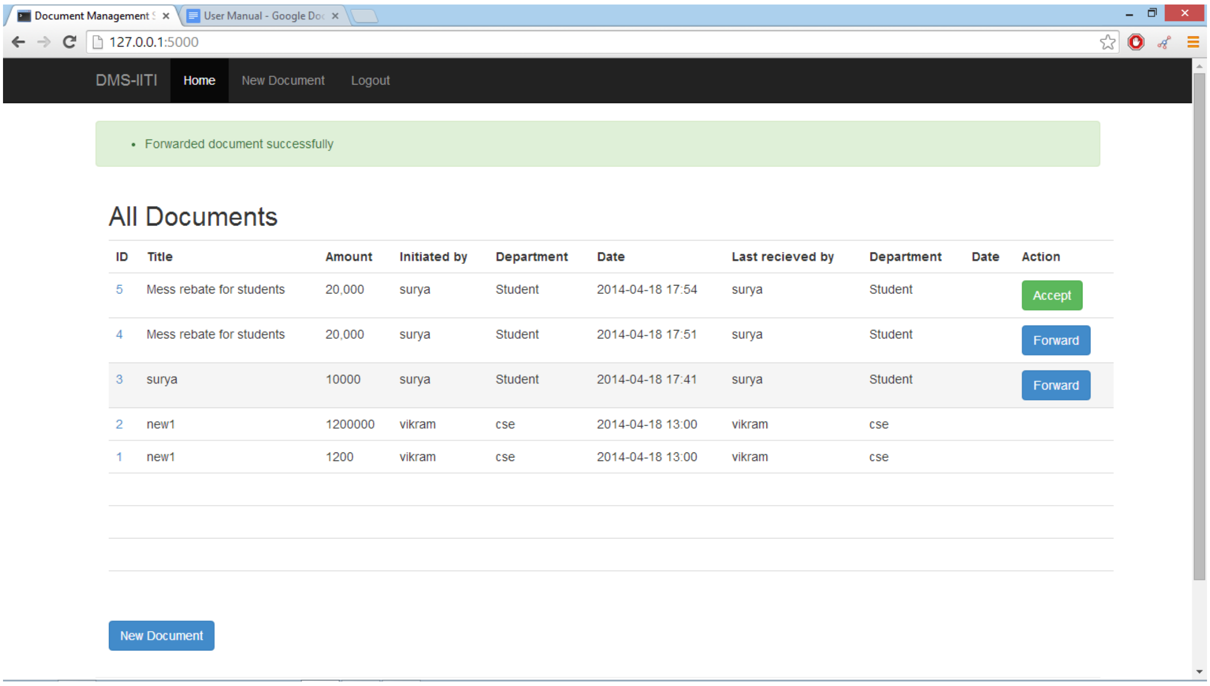
And the document which is forwarded to some user appears like this with an Accept action.



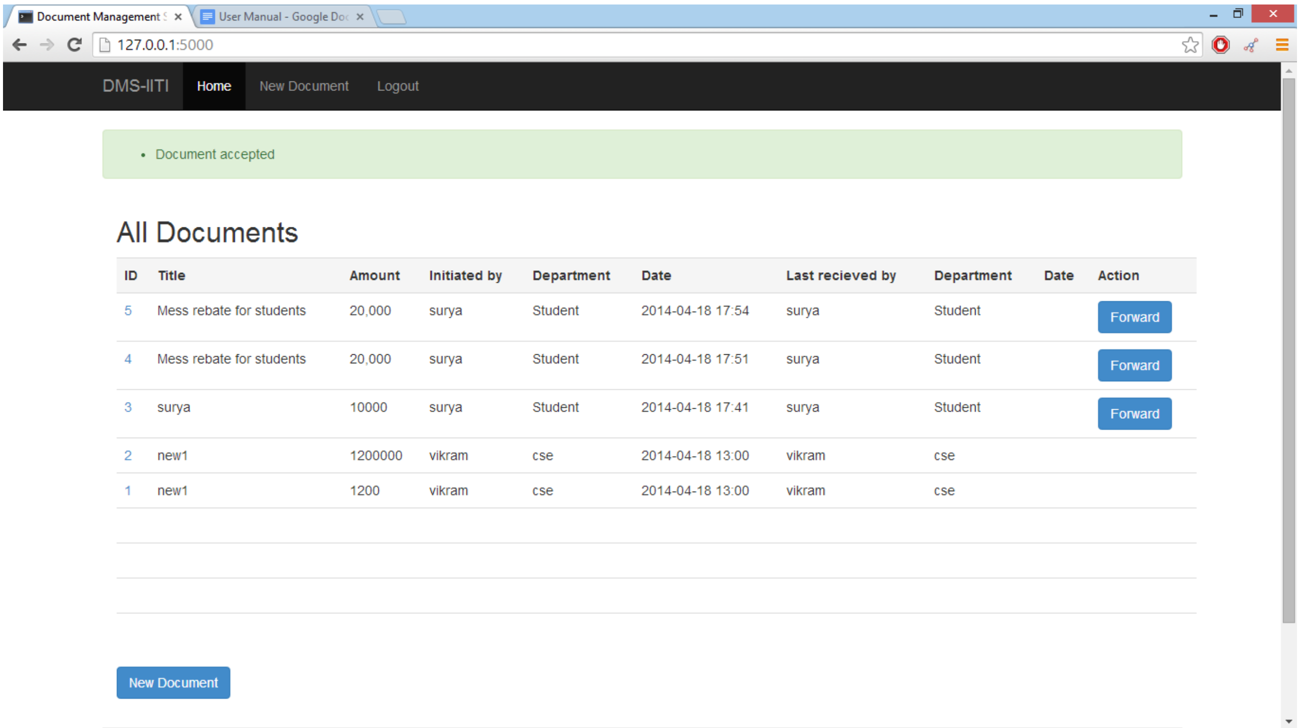
Thus the document can be accepted by the user who received it. And there will be a flash saying that the document has been successfully forwarded

2.4 Accept

To accept a document, click the Accept button across the details of the particular document.



The screen shows a flash saying “Document has been accepted”.



Accepting a document, which means that the document has been processed the particular department, can further be forwarded to any other corresponding department or user.

Thus another Forward action appears across the document after accepting it.

2.5 Logout

To end the session, one has to log out of the portal, which can be done by clicking on the Logout tab in the navigation bar at the top of the page.

This redirects you back to the login page.

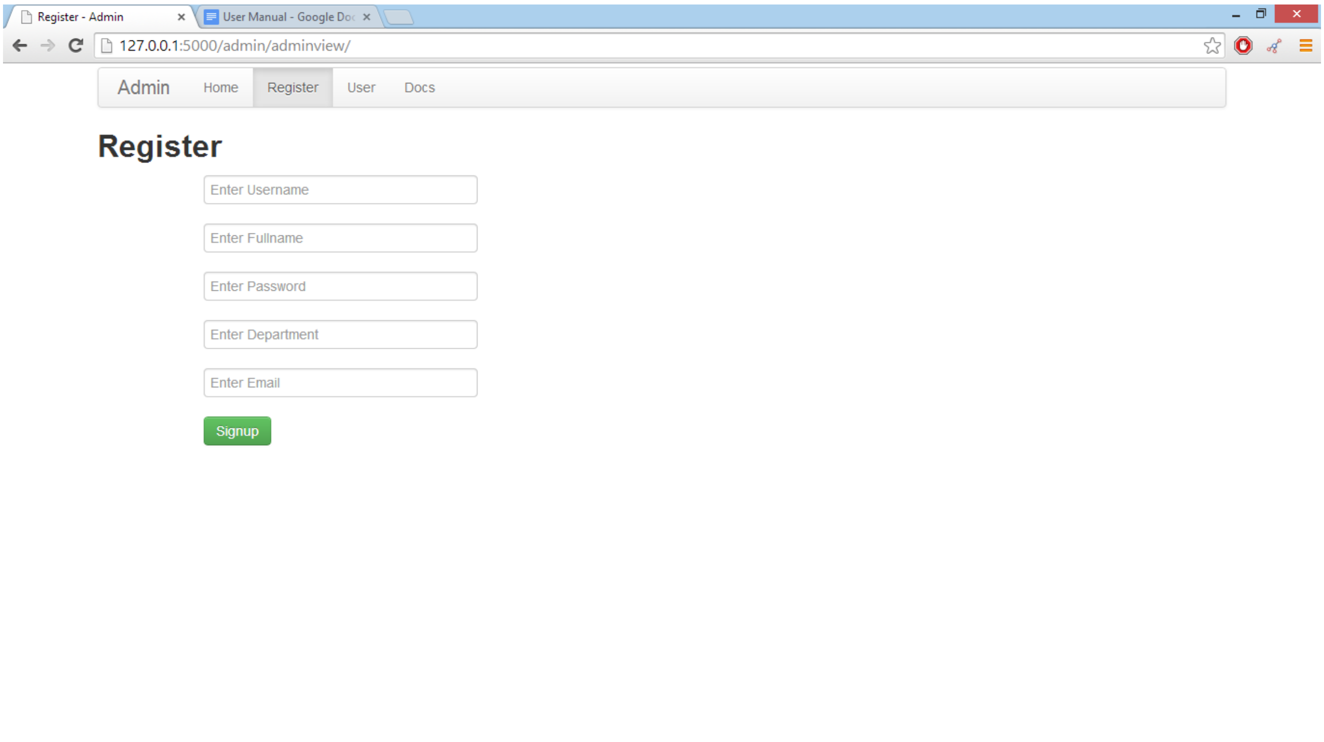
2.6 Site Administrator

2.6.1 Admin login

The Admin has a separate interface, to add users, and also view the whole database of users and the documents registered so far. To use administrative functionalities of the web service you need to login as admin.

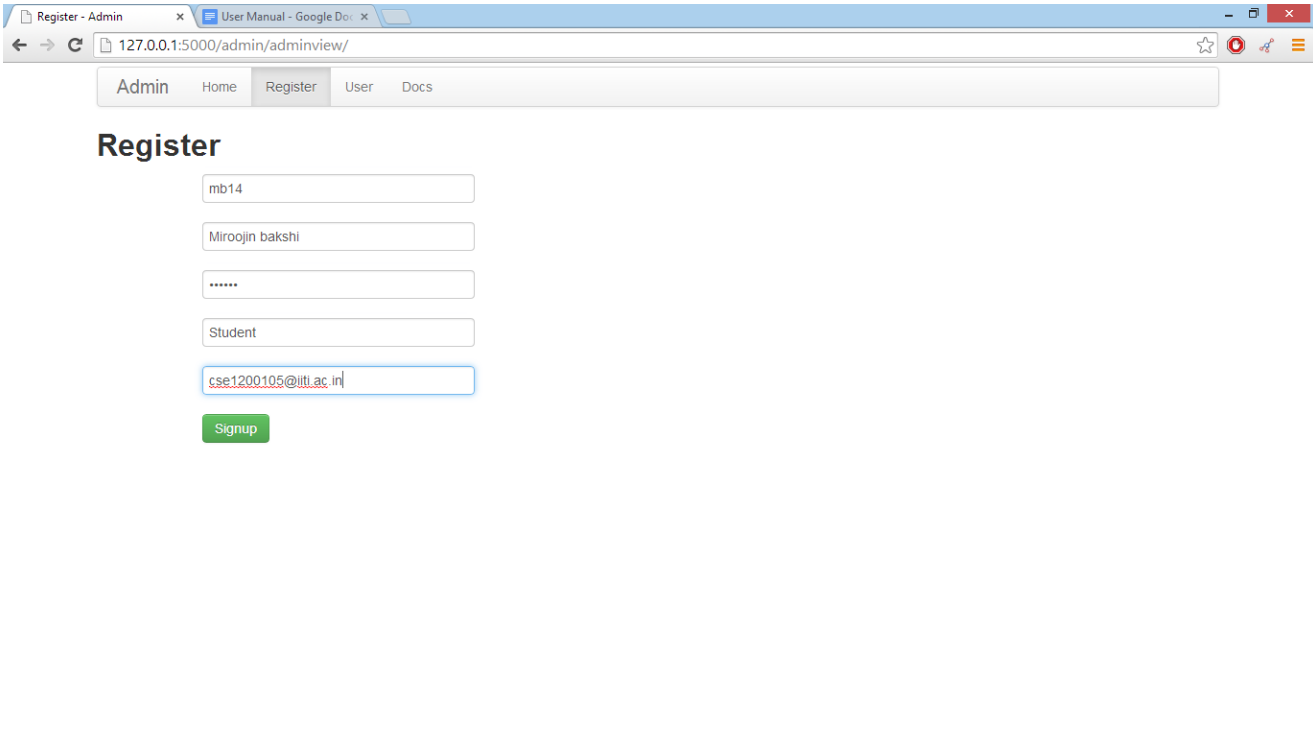
2.6.2 Register new user

To register a new user, the admin has to click on the register tab in the navigation bar at the top, which redirects to the page where a user can be signed up by giving the details of the user.

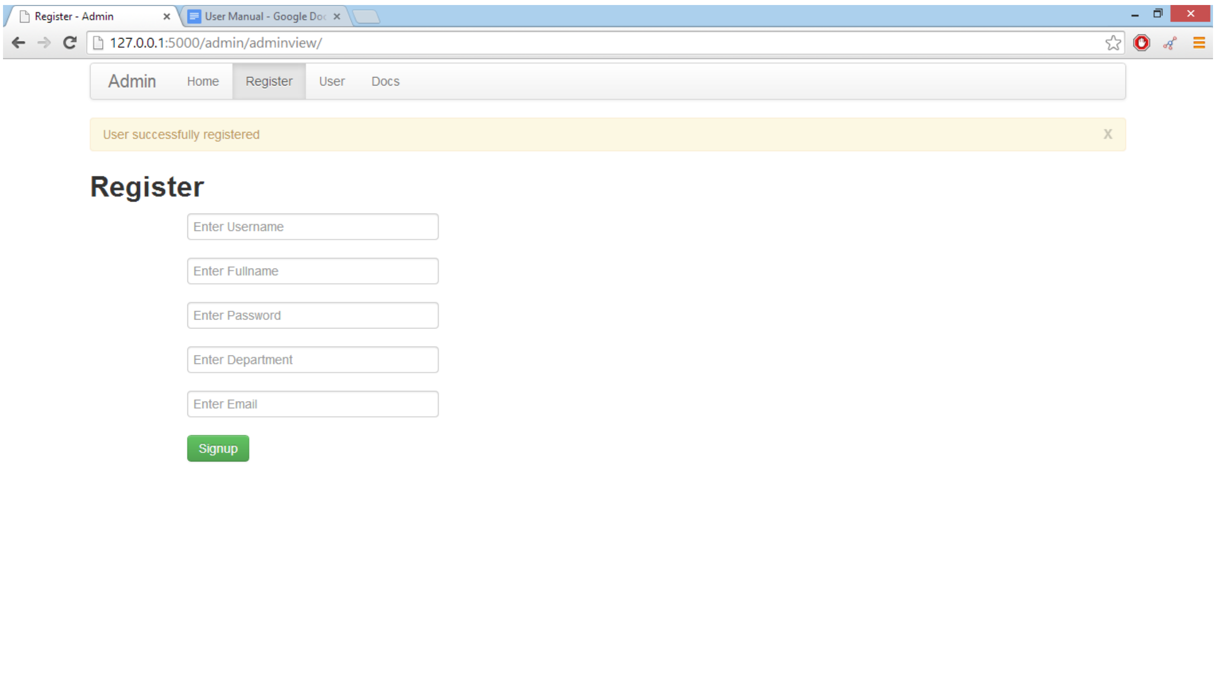


The details that are to be provided for registering a new user are
Username

Full Name
Password
Department (of the user)
Email (of the user)

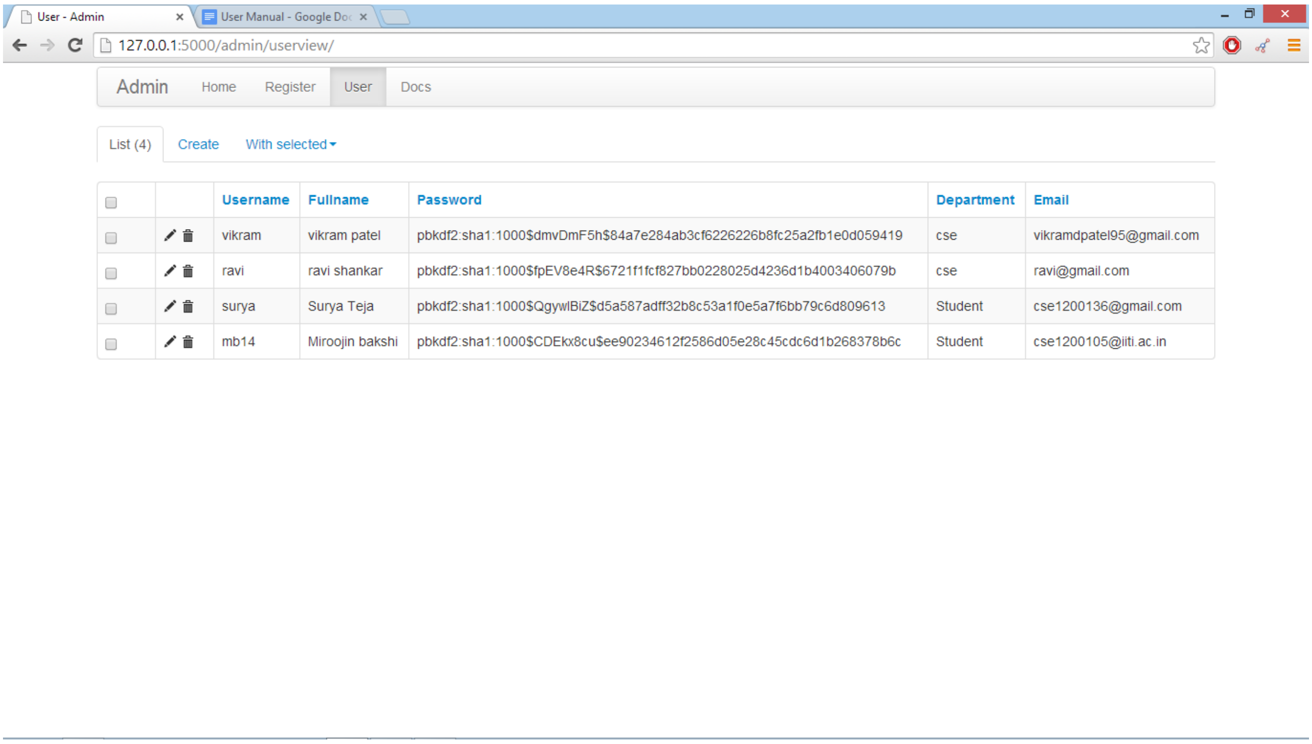


Then clicking the Signup button registers the user, and a flash message appears saying that the user has been registered successfully.

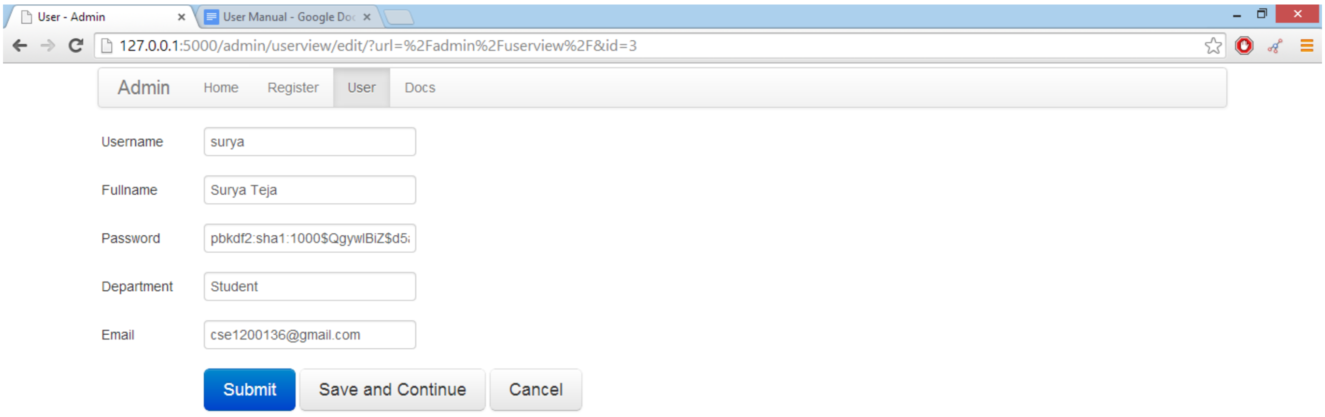


2.6.3 View Database

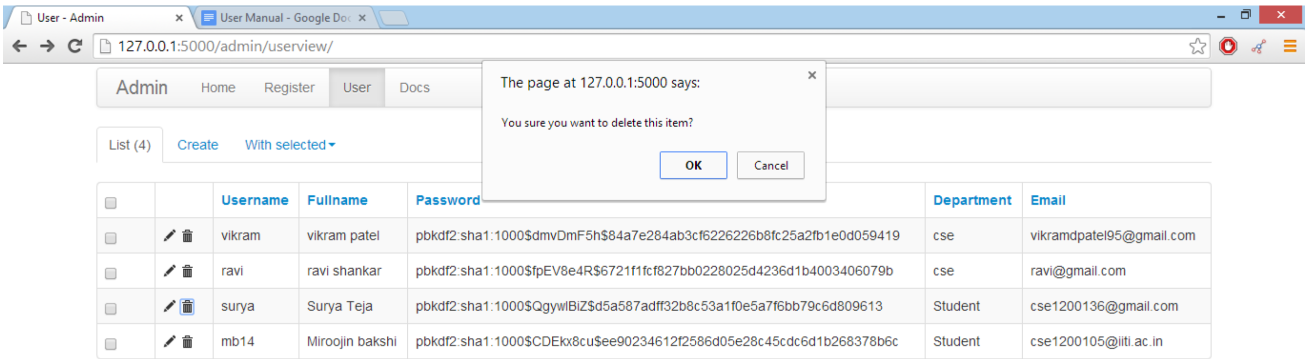
The Admin can view the database containing the all the users by clicking the Users tab on the top of the navigation bar, which displays the details of all the users in a table.



The details of the users can be modified by the admin, by the edit and delete options provided on this page.
To edit a user account, clicking on the edit icon beside the details of the user, opens up a page where the details can be edited, or the changes can be cancelled.



To delete a user account clicking on the delete icon beside the details if the user, flashes a message asking if we are sure to delete the user. By clicking OK we can delete the user successfully.



Multiple user accounts can also be deleted by selecting the users and With Selected->Delete.

2.6.4 Manage Documents

Admin can also view the database containing the details of all the documents registered so far, by clicking the Docs tab in the navigation bar at the top.