DOCUMENT MANAGEMENT SYSTEM (DMS)

QUICK GUIDE

Foreword

This manual will guide the user on the use of various features and functionalities available in the Department of Budget and Management (DMS) - Document Management System (DMS). It provides step by step instruction intended for use by the stakeholders and end users.

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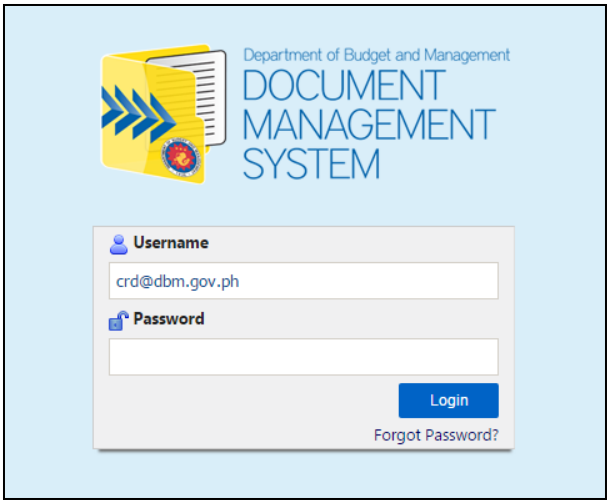
1.0 GETTING STARTED

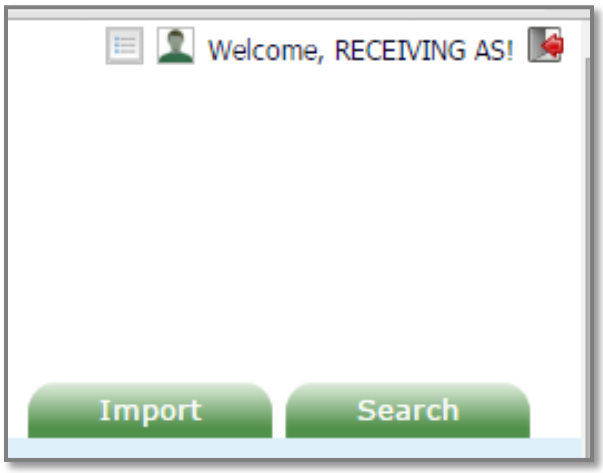
1.1 Log - on

- Use the web browser to access the DMS website (http://dms.dbm.gov.ph)
- On the login page, enter your Username and Password
- Click Login, then the DMS web interface opens at the home page.



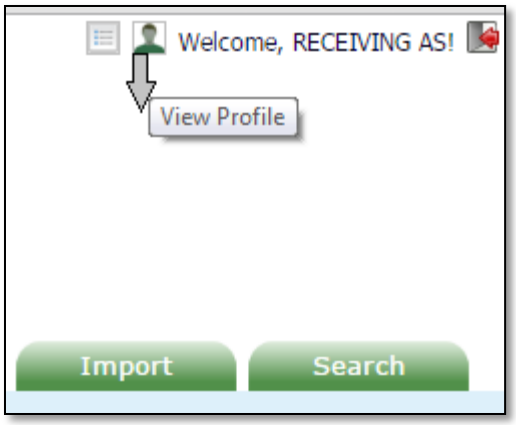
1.2 Log-off

- To log-off from the DMS, click the log-out button at the upper right of the homepage.



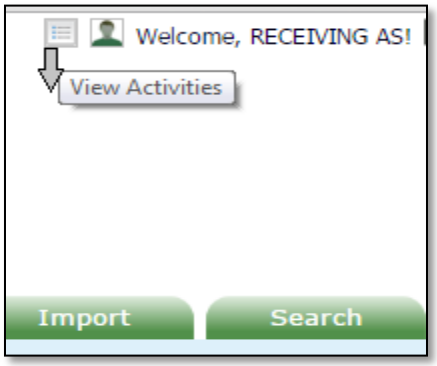
1.3 User Account Settings

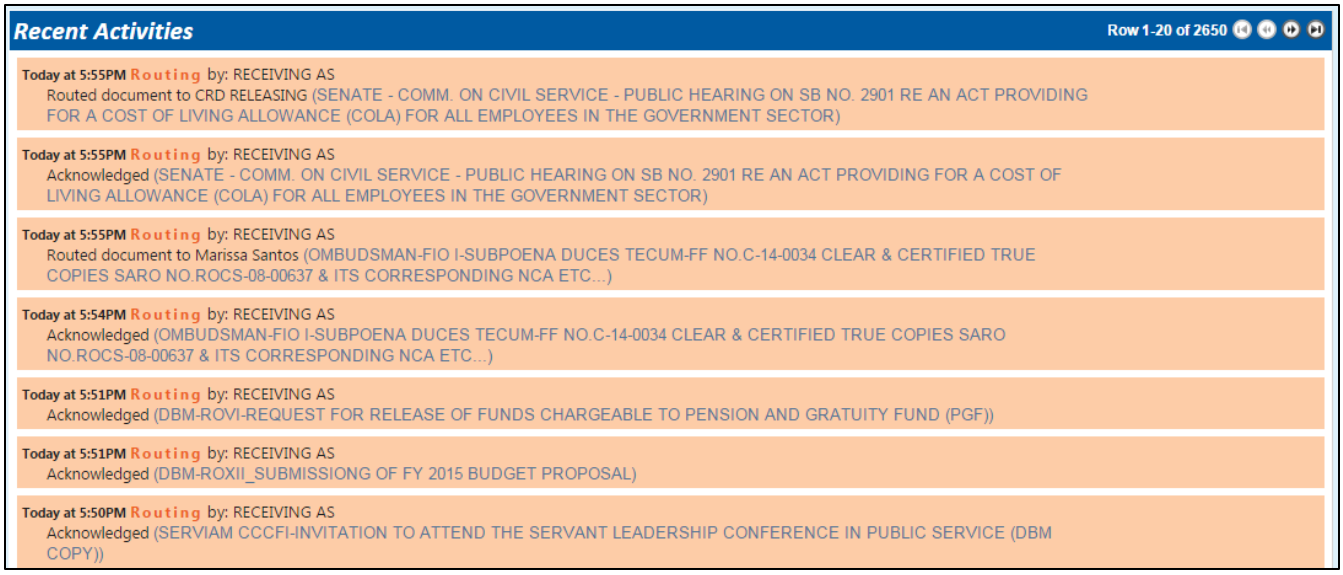
- To update account settings, click the Profile icon, found on the topmost right part of the screen.



1.4 Recent Activities

- This is to view and monitor your recent actions/activities on your account.
- To view your recent activities, click the small list box icon on the upper right part beside the view profile icon.





2.0 SEARCH

An important functions of DMS is the ability to efficiently and effectively find all documents uploaded and added by the users. The DMS of DBM provides a powerful search mechanism with various options for searching the documents in the system and finding its relevant content.

2.1 Global Search - This will search for the title, filename, index, notes, and tags.

There are two ways to perform the Global Search:

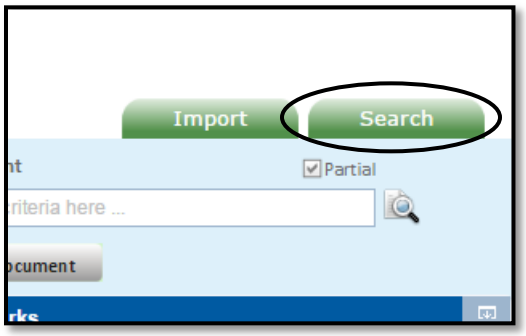
- **Partial Search**
  - The search tool will look for a matching content word on the title, filename, index, notes and tags of all documents stored in the system.
  - Tick the box beside the "Partial" located at the upper right corner of the search tab to activate partial searching.

Note: Please make sure to always enclose the key words, with a quotation mark (") to increase the accuracy of the search result.

- **Exact Search**
  - This will search for the exact word you inputted in the search box.
  - Remove the check in the box beside the "Partial" by ticking the box. Enter the exact word that you want to search and enclosed it with a quotation mark (") and press enter or click the search icon.

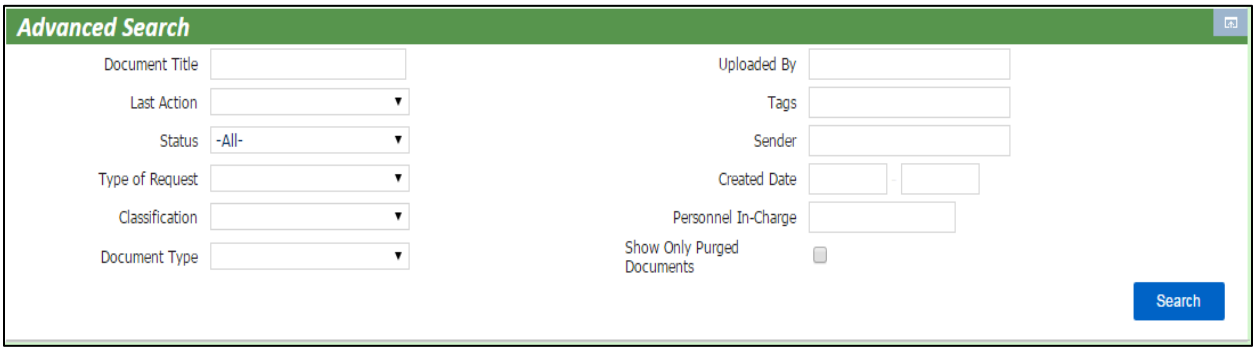
2.2 Advanced Search - This search function will allow you to filter search results using the document's metadata to increase the accuracy of the search results.

- Click the **Search Tab** in the upper right corner of the DMS home page to load the *Advanced Search Page.*



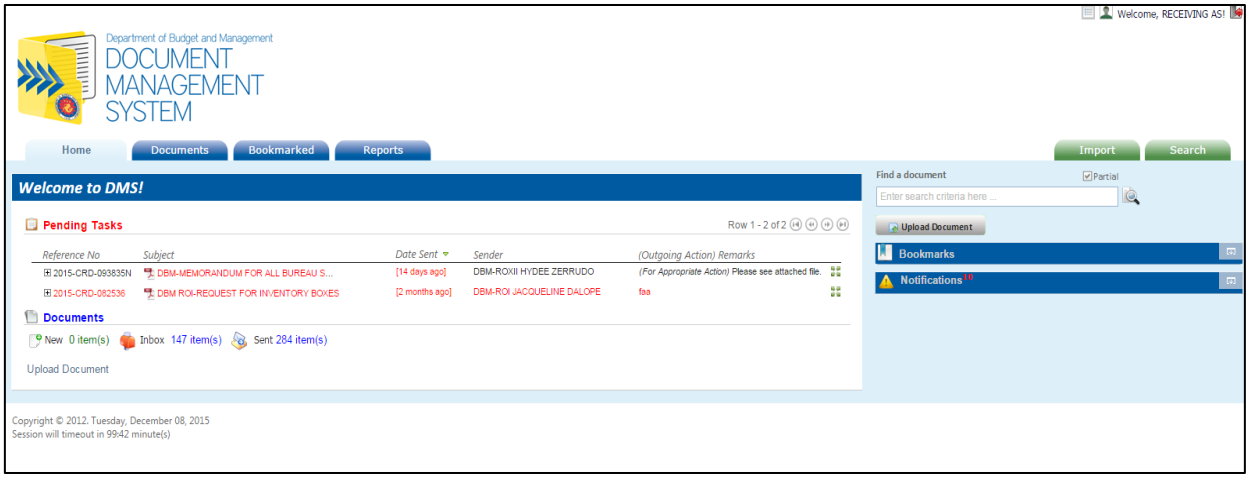
- In the **Advanced Search** page, you can define single or combination search criteria. You can filter your search by:

a. Document Title
b. Last Action
c. Status
d. Type of Request
e. Classification
f. Document Type
g. Uploaded by
h. Tags
i. Sender
j. Created Date
k. Personnel In-Charge
l. Show only Purged Documents
(Note: This will show documents with Retention Period)

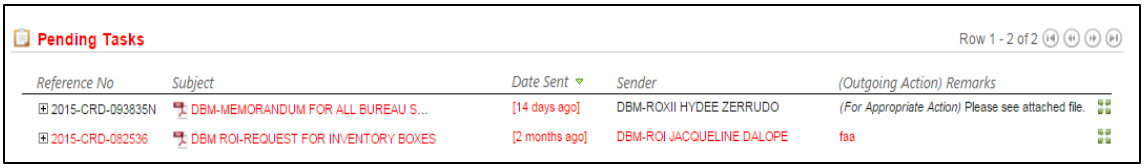


3.0 DMS WEB INTERFACE

3.1 Home

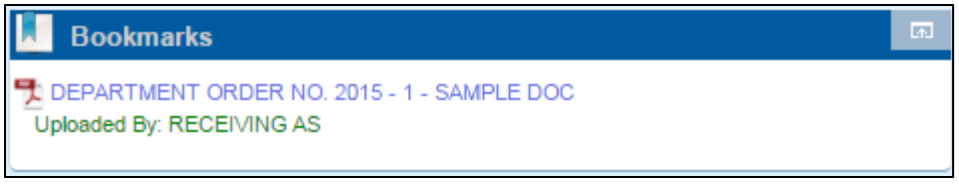


- **Pending Task Section -** This shows you incoming documents routed by other users

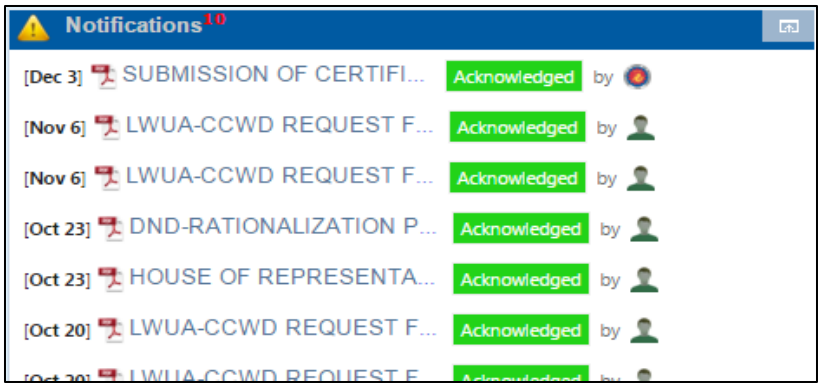


- **Document Section -** This section is divided into three parts:
  - **New** - Document(s) that you uploaded and received on that day.
  - **Inbox** - Document(s) that you uploaded and received.
  - **Sent** - Document(s) that you routed to another user.

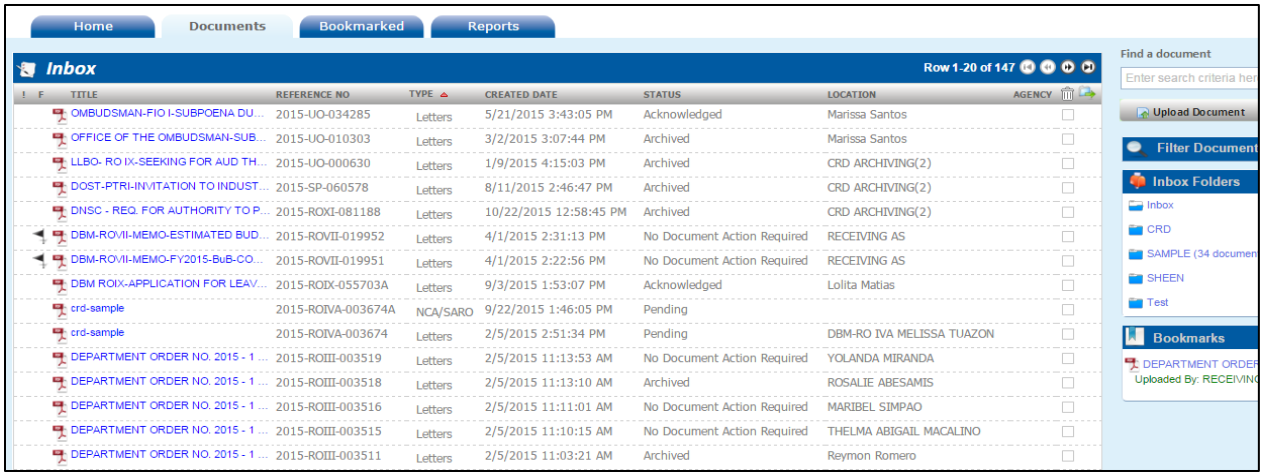
- **Bookmark -** This section shows the document(s) that you added to your favourite list.



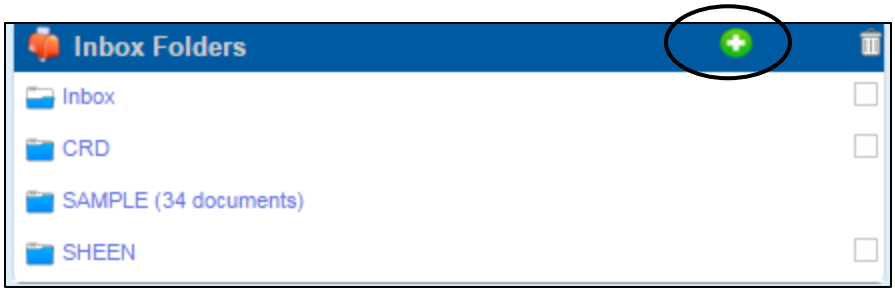
- **Notification -** This section shows the status of the document(s) that you recently routed.



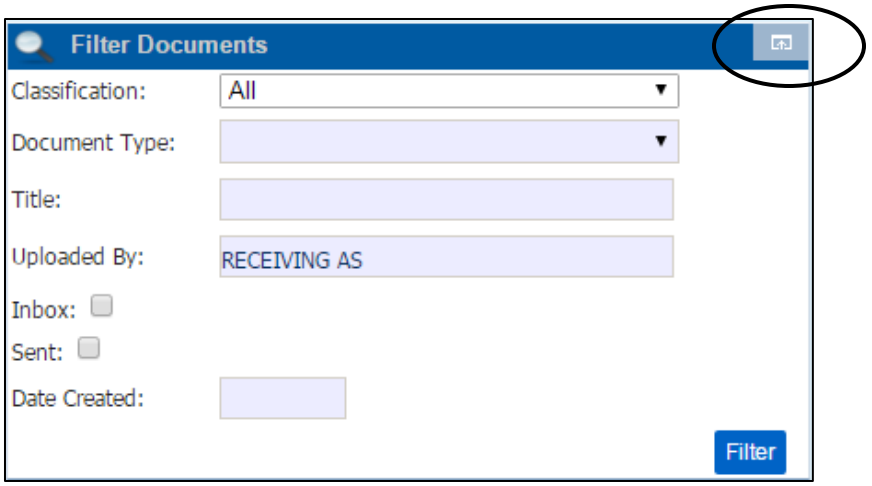
3.2 Document Tab - Shows the document(s) that you uploaded and received.



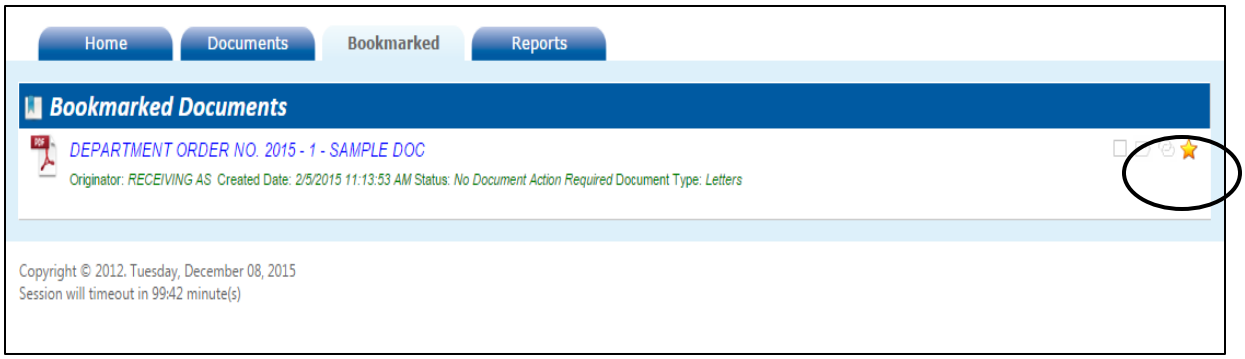
- **Create Folder -** This is to organize the documents in the Inbox. To create folder, click the plus icon found on the right part of the inbox folders.



- **Filter Documents -** This is under Document Tab where you can filter document list by:
  a. Document Type
  b. Title
  c. Uploaded by
  d. Inbox
  e. Sent
  f. Date Created

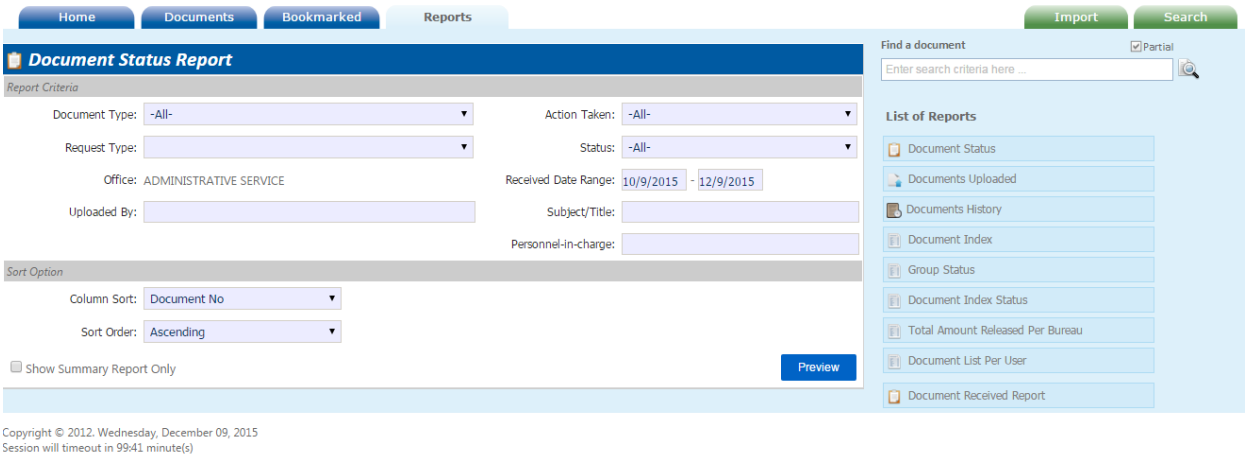


3. 3 Bookmark Tab - Shows the document(s) that you added to your favourite list.

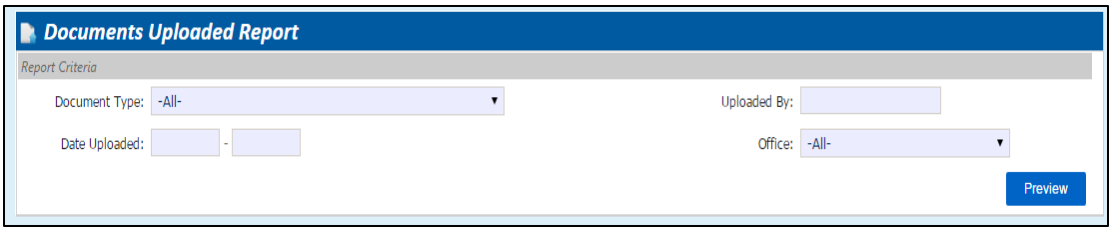


3.4 Reports Tab - This shows all the documents that you uploaded in the system. You can use these types of reports in generating documents:

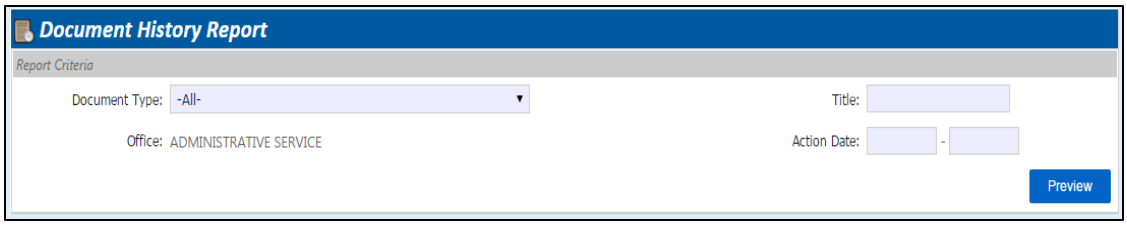
a. Document Status Report



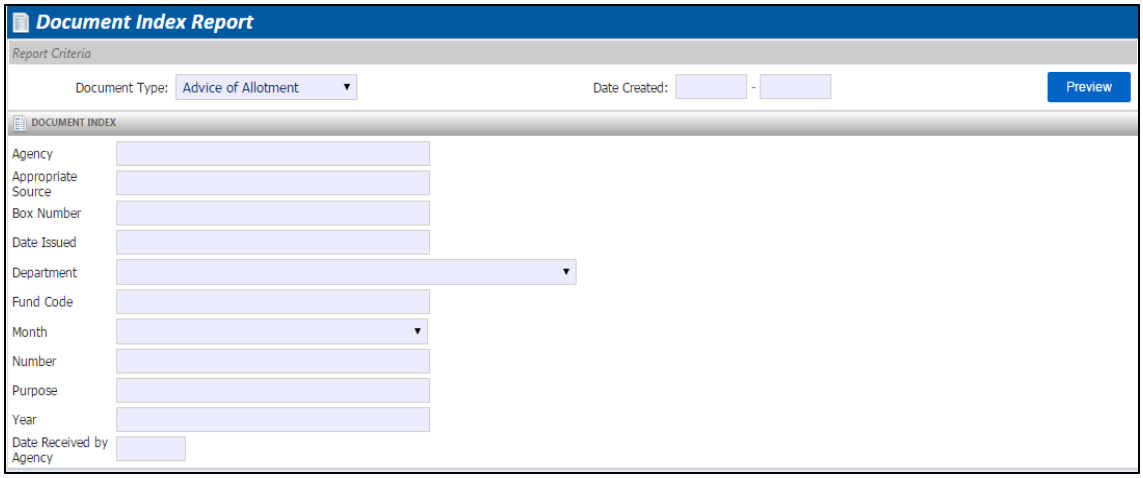
b. Documents Uploaded Report



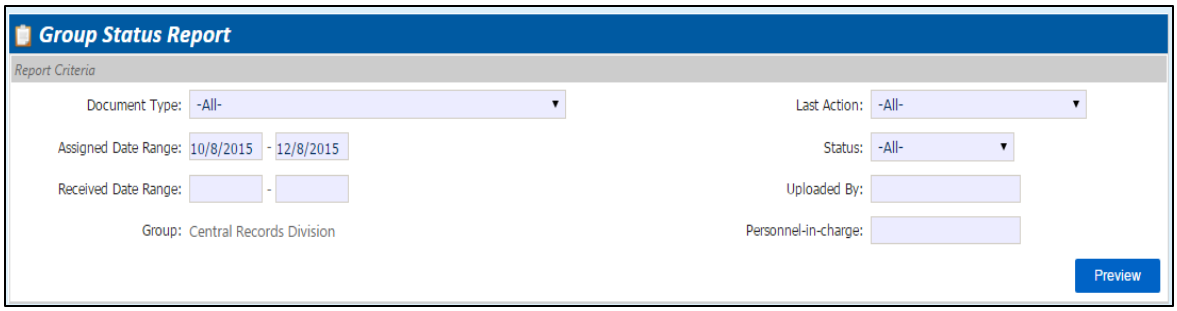
c. Documents History Report



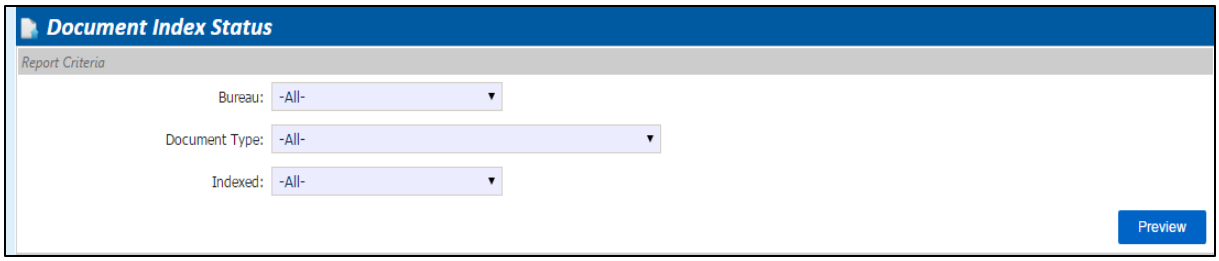
d. Document Index Report



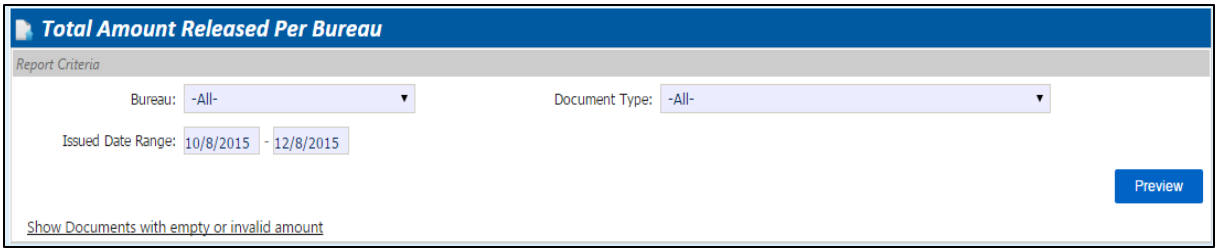
e. Group Status



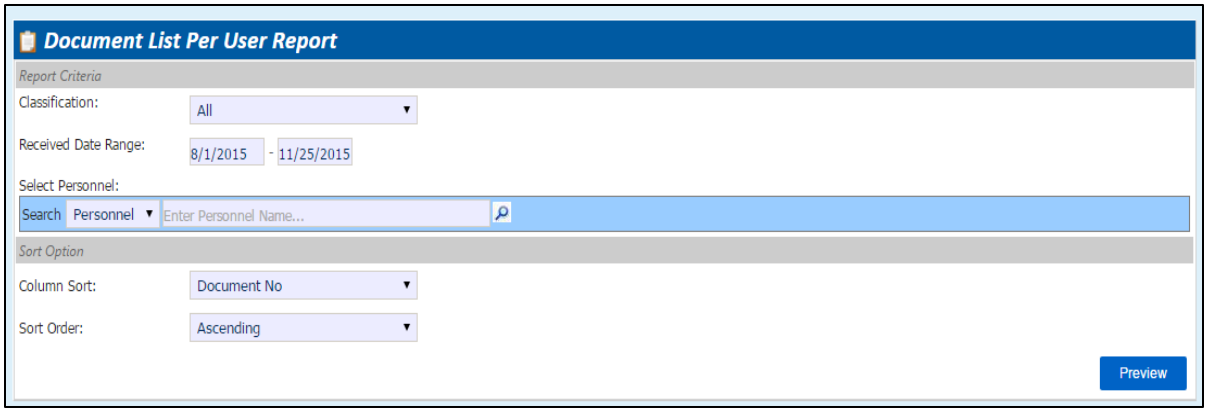
f. Document Index Status Report



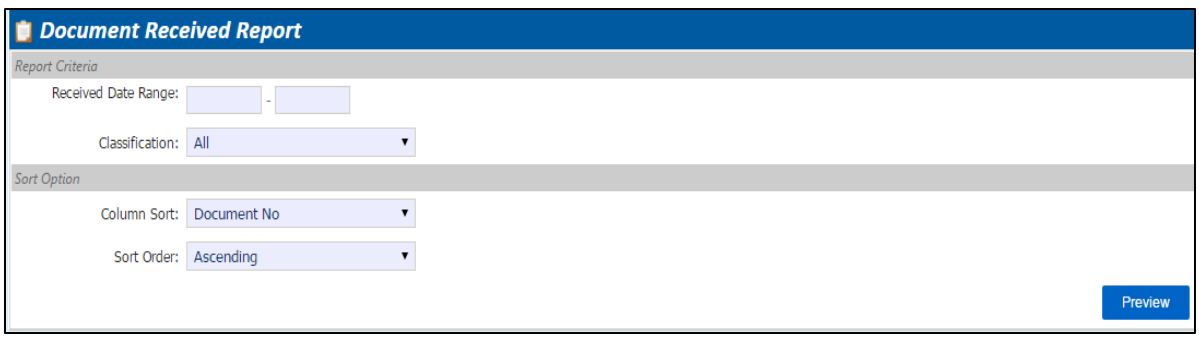
g. Total Amount Released per Bureau



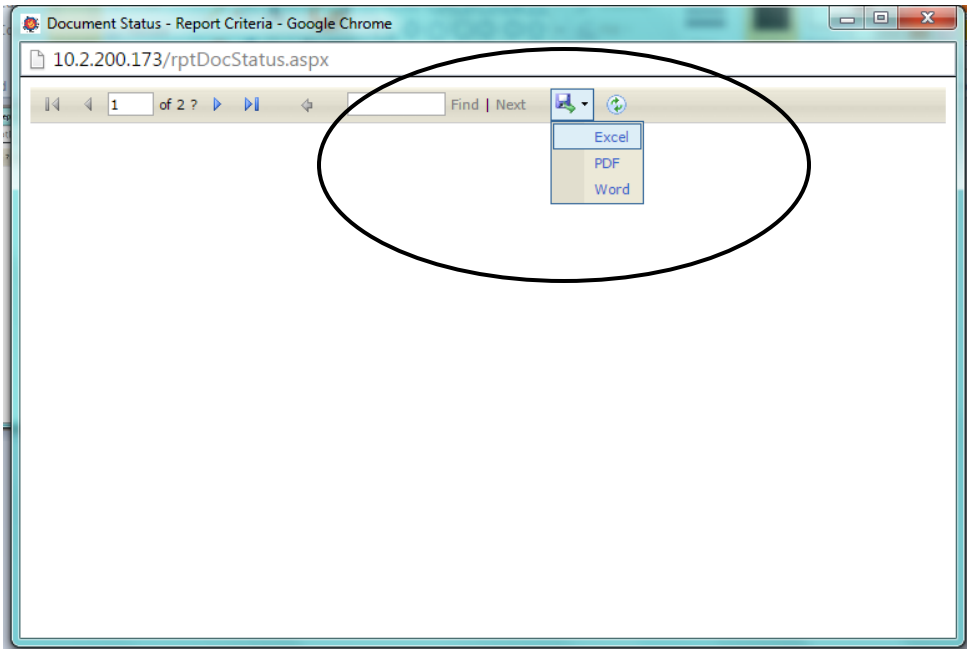
h. Document List per User



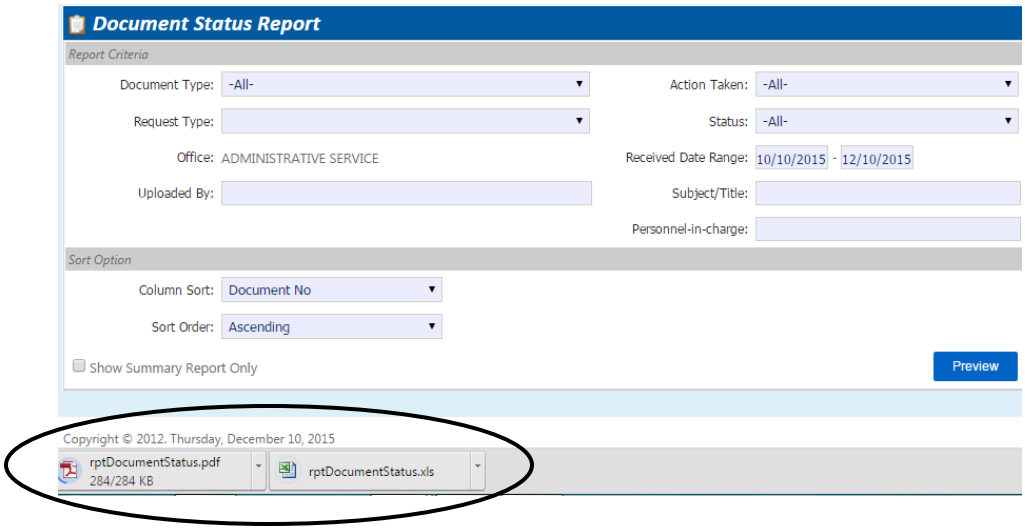
i. Document Received Report



- After clicking Preview button, the Document Report generator window will appear. Click the **Export** button on the upper part of the window and choose the format of the report that you prefer.



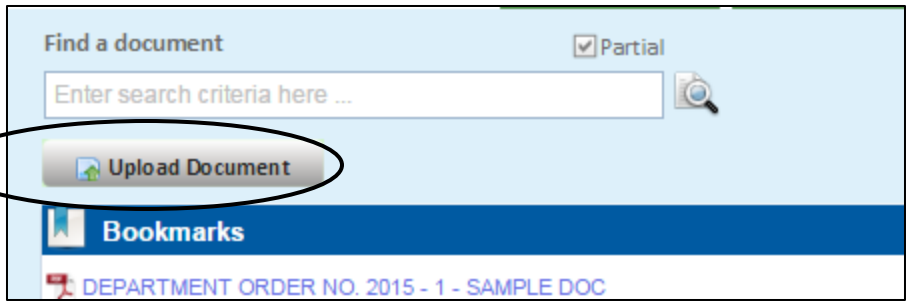
- The report will then be download from your browser. Click the downloaded file to preview.



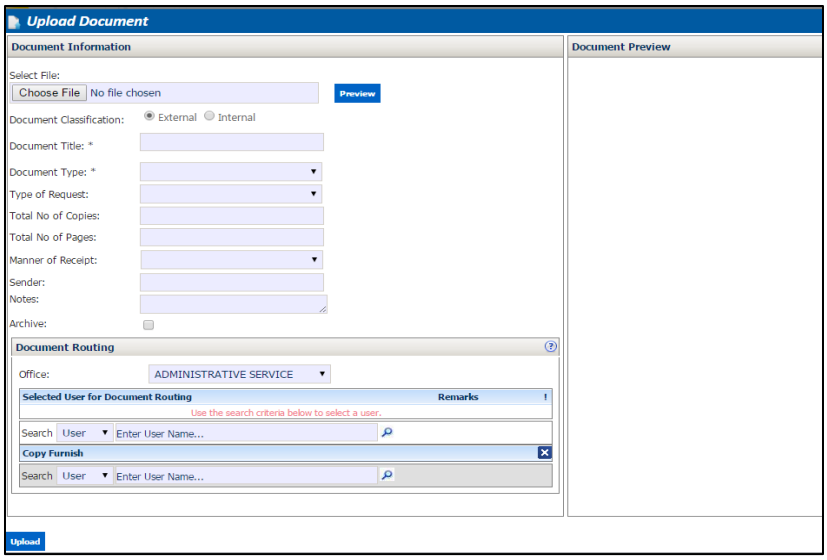
4.0 UPLOADING DOCUMENT TO THE DMS

Steps:

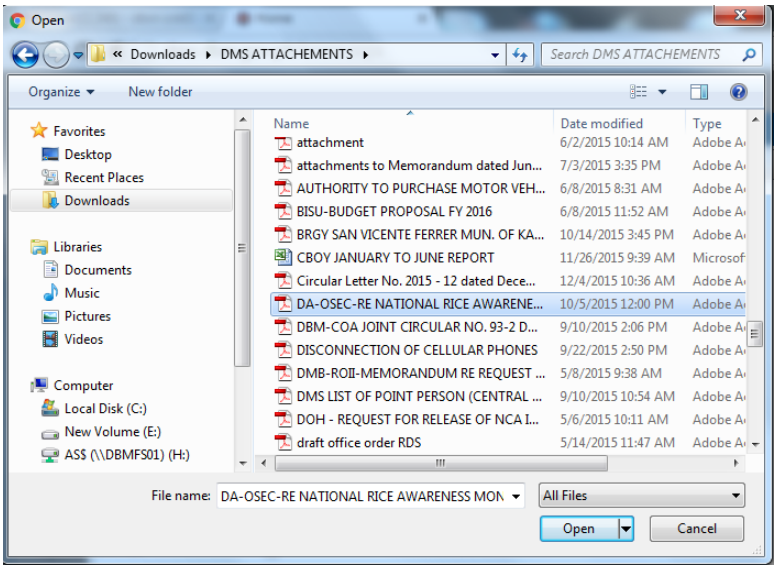
1. Click the Upload Document button.



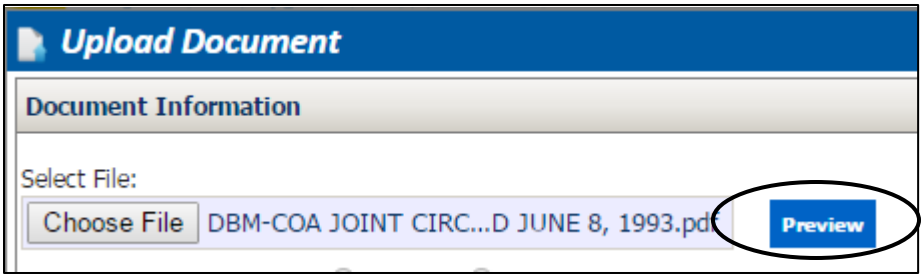
2. To select document, click **Choose File** button.



3. The "Open Window" will display. Browse and select the document that you want to upload and click **Open** button.

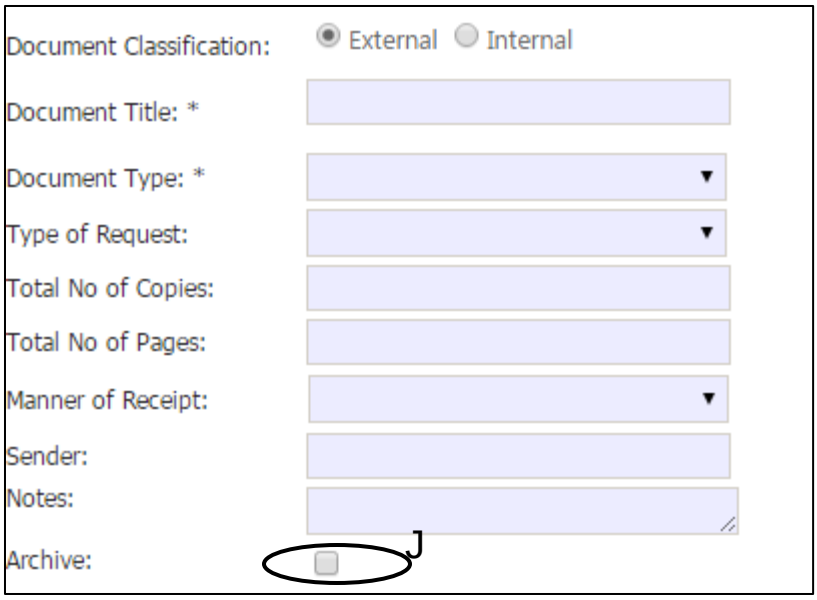


4. Click the **Preview** button to view the document.

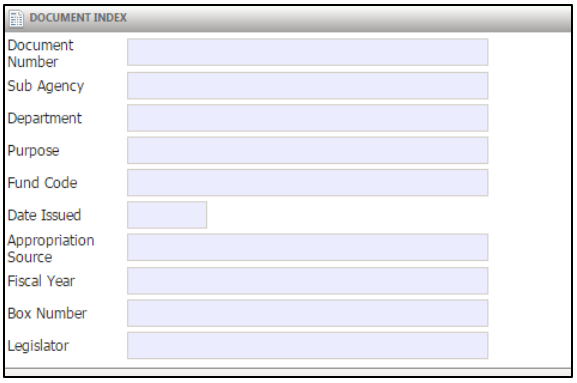


5. Fill in the information on the following fields:

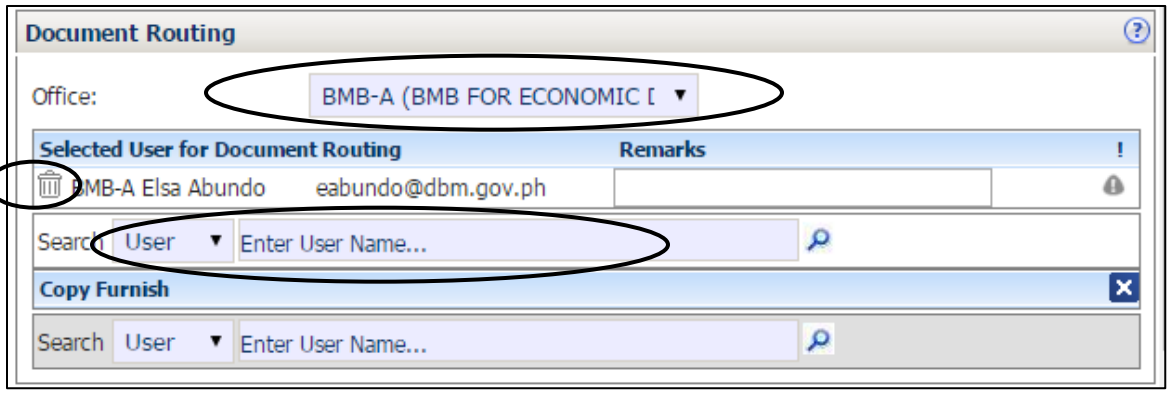
A. Document Classification
B. Document Title (required)
C. Document Type (required)
D. Type of Request
E. Total Number of Copies
F. Total Number of Pages
G. Manner of Receipt
H. Sender
I. Notes
J. *Archive check box* - used to upload documents for archived directly.



6. Complete the fields for the document index (optional).

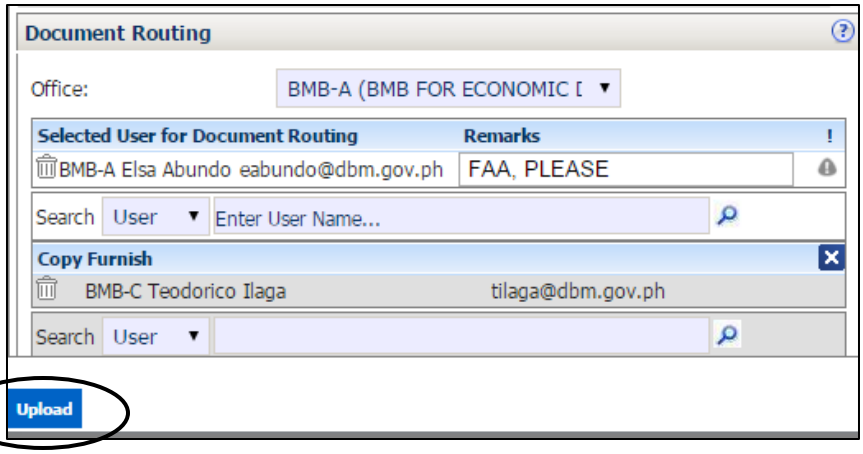


7. In the **Document Routing Section**, select the office responsible for the document. You may select other recipient by searching the name in the user search box and tick the check box next to user to select. To delete the selected User, click the trash icon near the user name. The Remarks in optional.



8. You can add recipient in the **Copy Furnish Section** if you wish to cc a certain office or user.

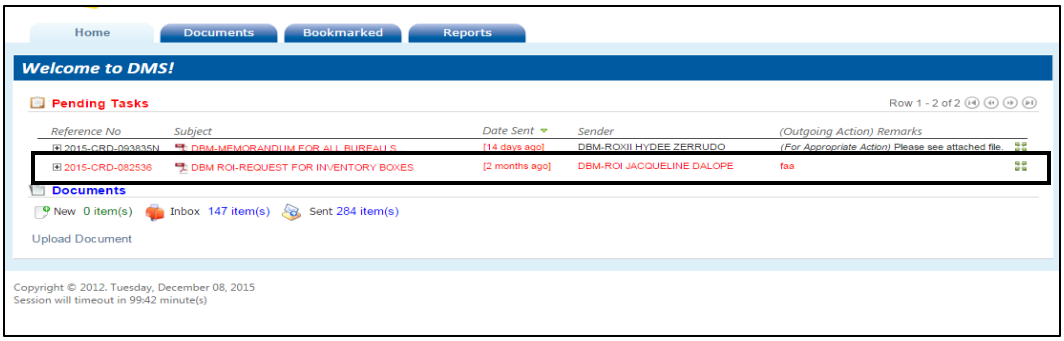
9. Click the **Upload** button.



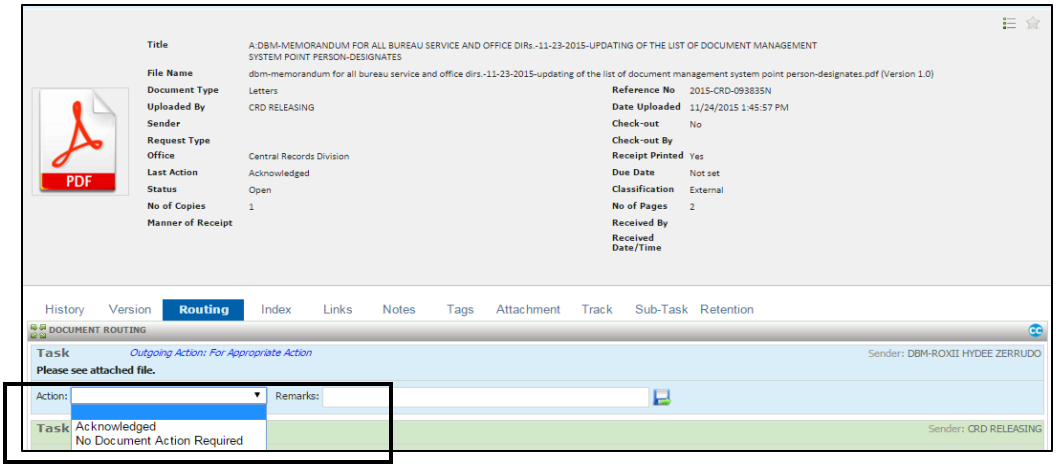
5.0 FEATURES OF UPLOADED DOCUMENT

5.1 Acknowledgement Receipt

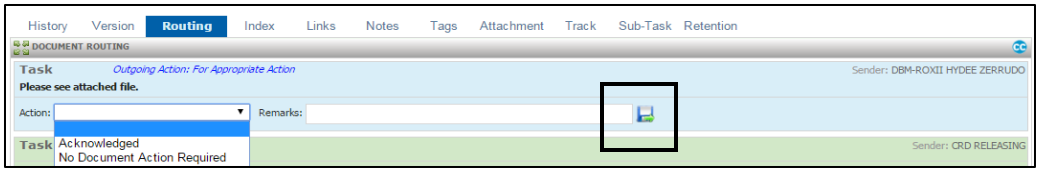
- In the home page pending task section, select the document to respond to.



- After selecting the document by clicking the document title, the system will redirect to the routing tab under the document preference page.
- Select the desired action for the document such as **Acknowledge** and **No Document Action Required.**

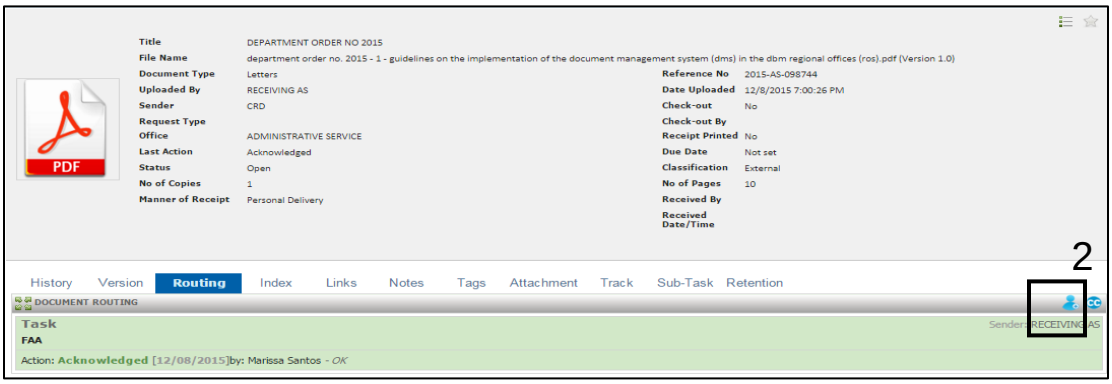


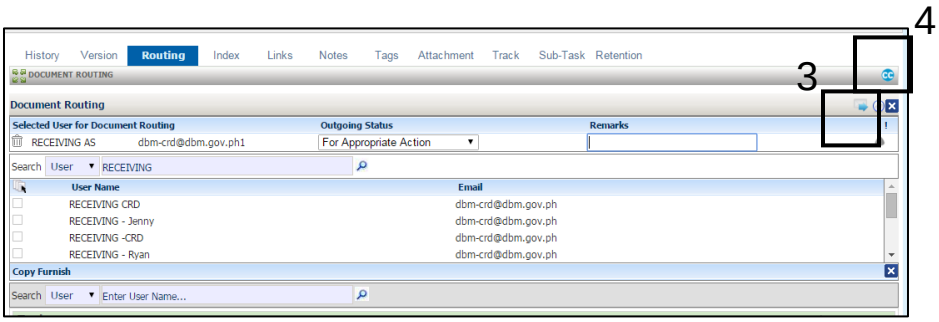
- Input remarks (optional) and click the submit icon of press enter. Once you made an action on the document, you can also route the document to another user.



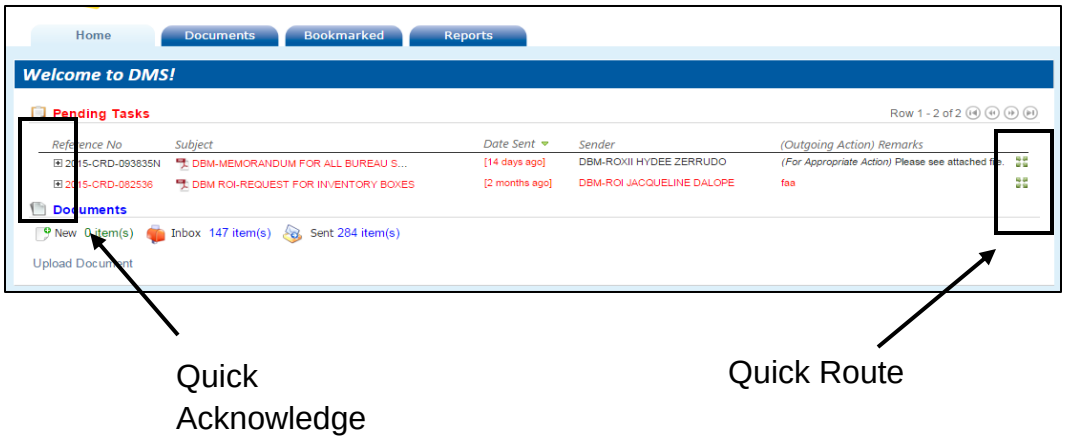
5.2 Document Routing

1. To route a document you previously acknowledge, go to the document preference page of the DMS.
2. Click the routing tab and click the blue icon on the top-right corner to show the document routing box.
3. Supply the user and remarks (optional), and click the route icon.
4. You can add copy furnish by clicking the blue CC icon.

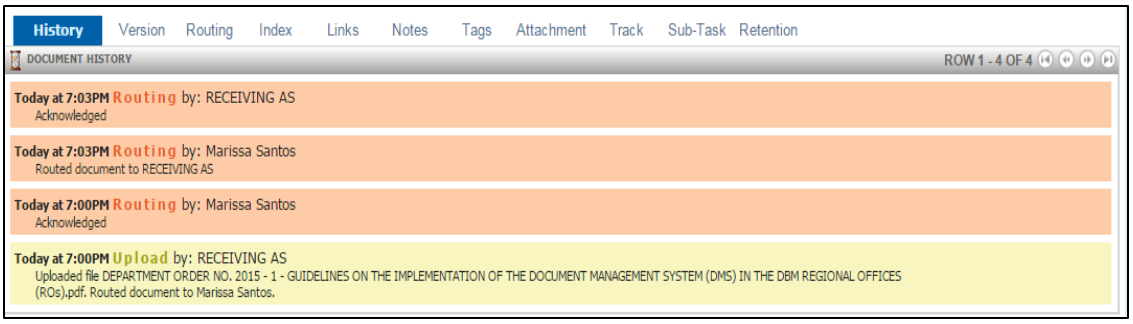




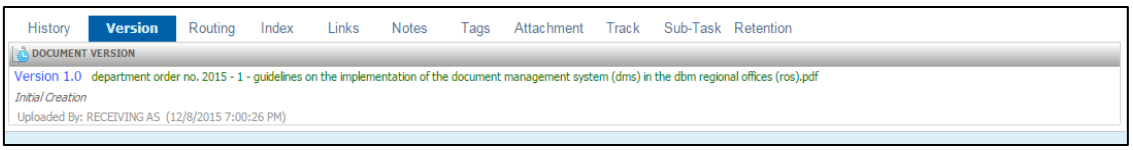
5.3 Quick Acknowledging and Routing



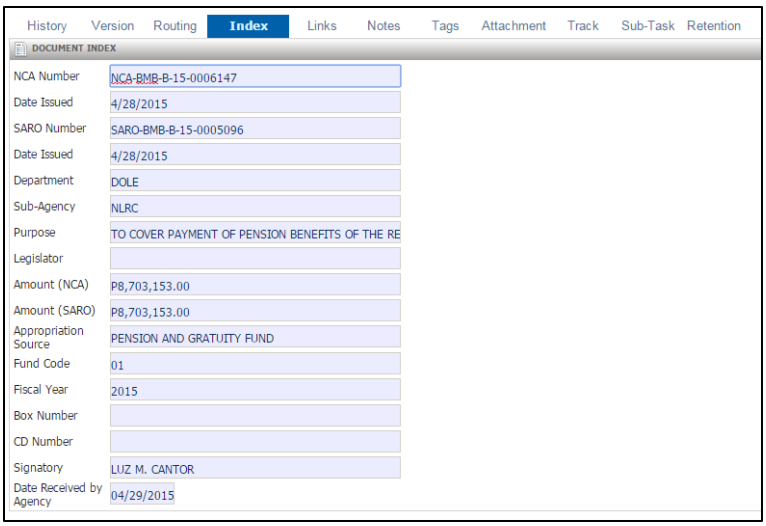
5.4 Document History - This shows the specific history of a document.



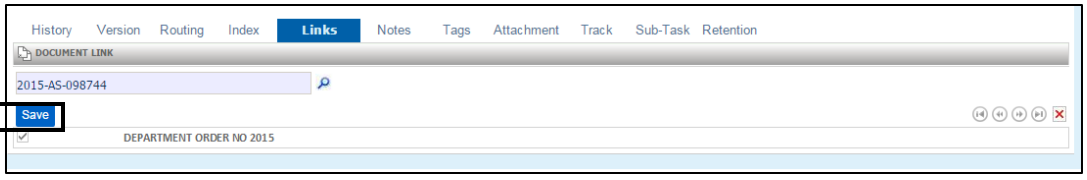
5.5 Document Version - This shows the versioning of the uploaded file in a document.



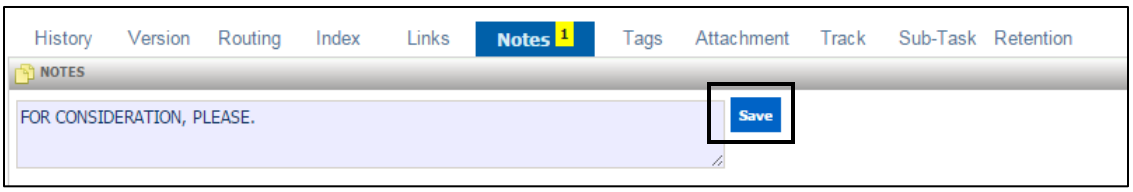
5.6 Document Index - This shows the index and specific information of a document. Once the document is archived, you can supply the indexes fields according to the document type.



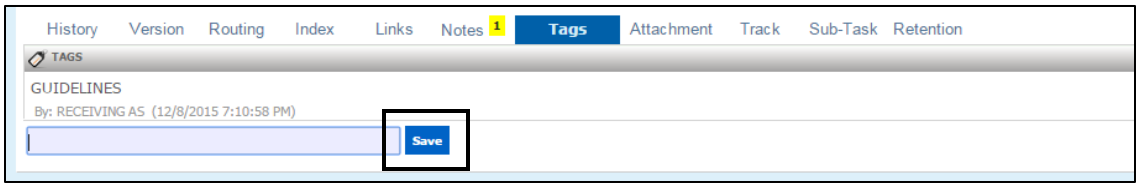
5.7 Document Interlink - This shows the other documents that you link to a certain document. In the link tab, input a reference no. or word and click the check box, then click Save button.



5.8 Document Notes - This shows the notes added by user. Input text in the textbox under notes and click the Save button.

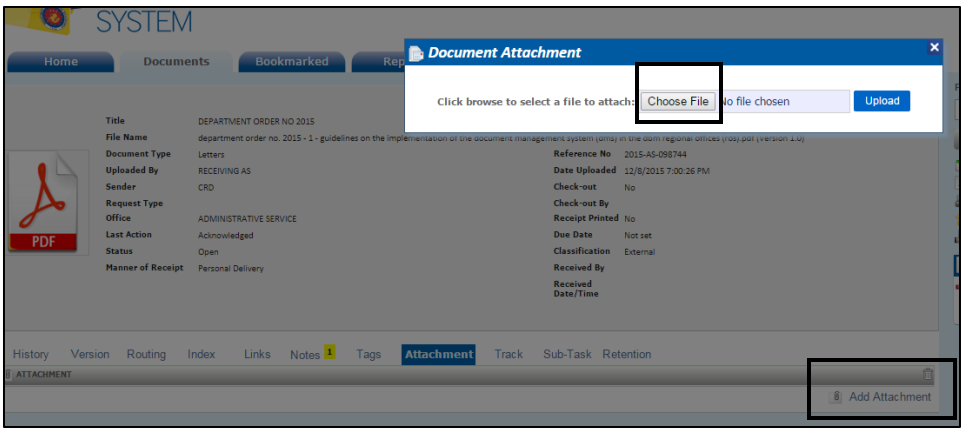


5.9 Document Tags - This shows the tags under a document. You can use tags for easily retrieval of documents. Input text in the textbox under tags and click Save button.

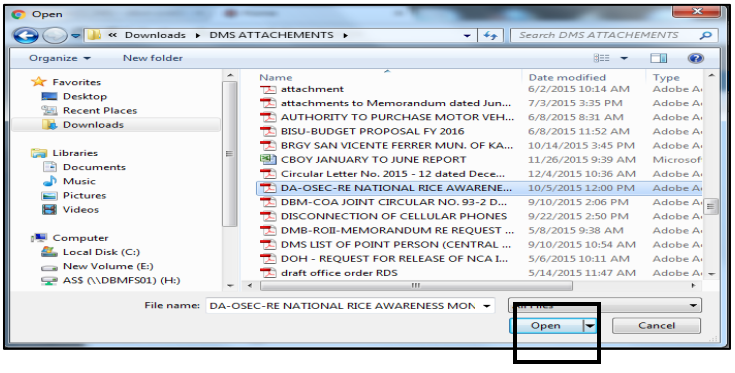


6.0 Document Attachment - This shows the other related document to the primary document.

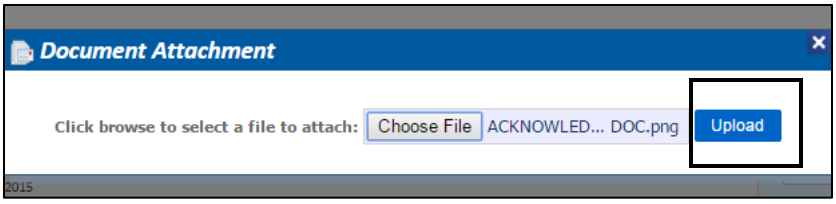
- Click the Add Attachment link button and Choose file that you want to attached.



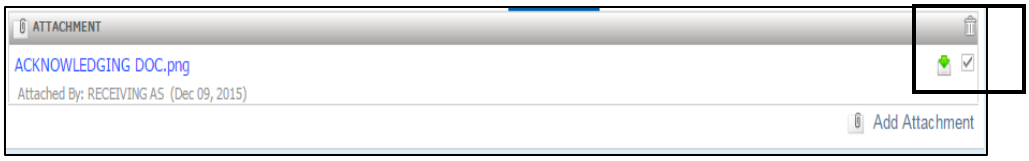
- An Open window will appear. Select the file that you want to attach, then click **Open** button.



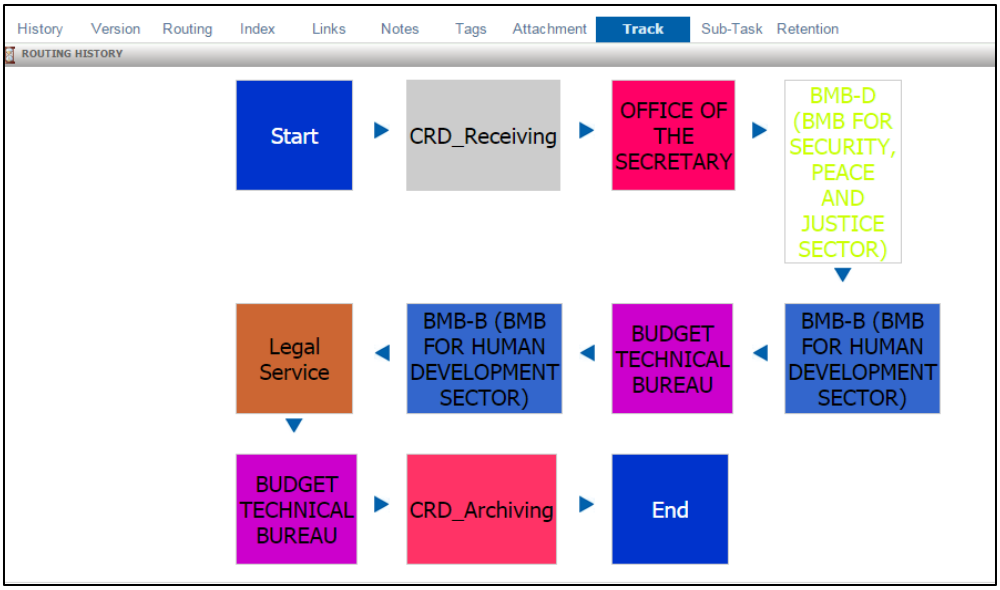
- In the document attachment window, click **Upload** button.



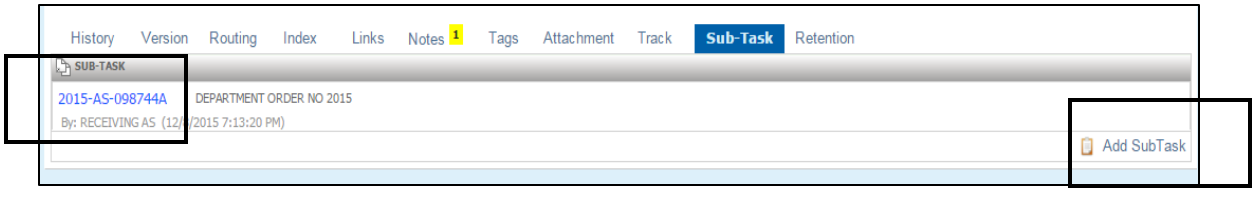
- To delete the document, check the small box on the right part and click the **Trash** icon.



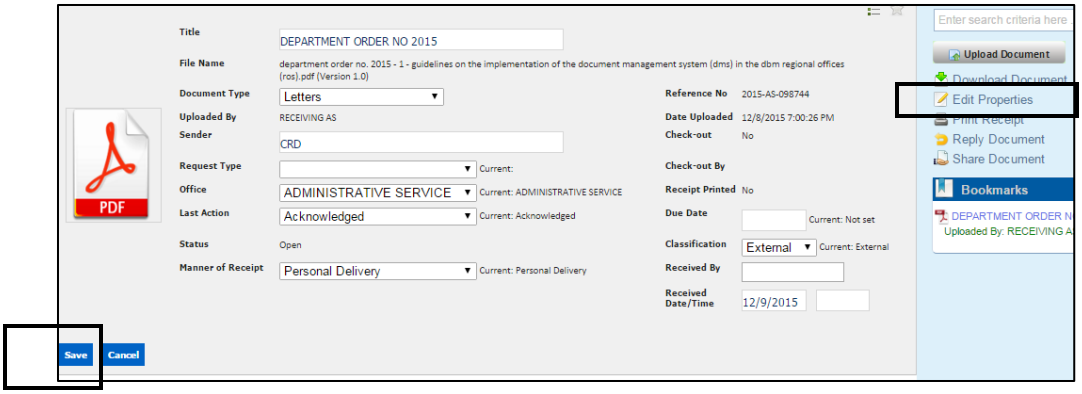
6.1 Track - This helps you to monitor the movement of document in the system.



6.2 Sub-Task - This is used when the document is intended for multiple recipient. Click the **Add SubTask** link button and click the added **Reference No.** to route into another user.

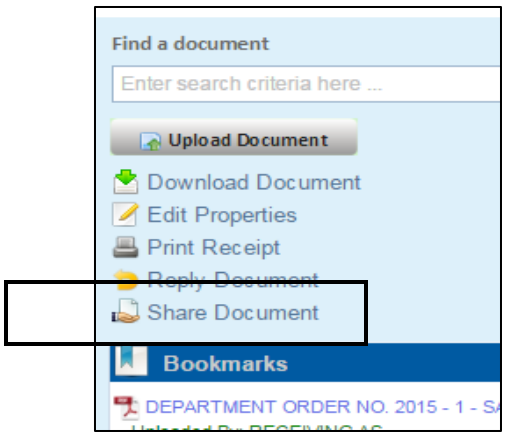


6.3 Edit Properties - To edit the information and status of the document, click the Edit Properties found on the right part of the document preference tab and click Save button.

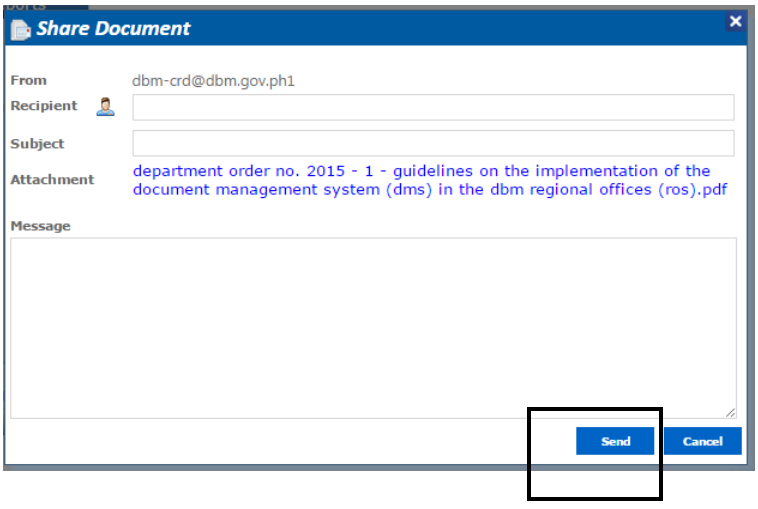


6.4 Share Document - This is to share document via email.

- Click the Share document found on the right part of the document preference tab. A share document window will appear.

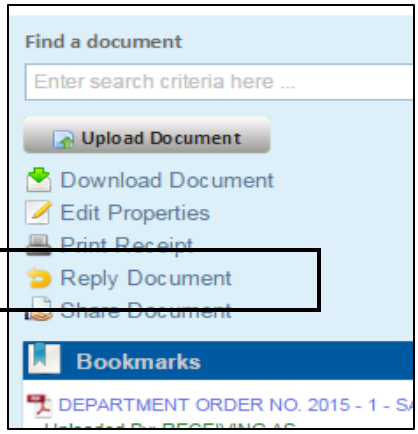


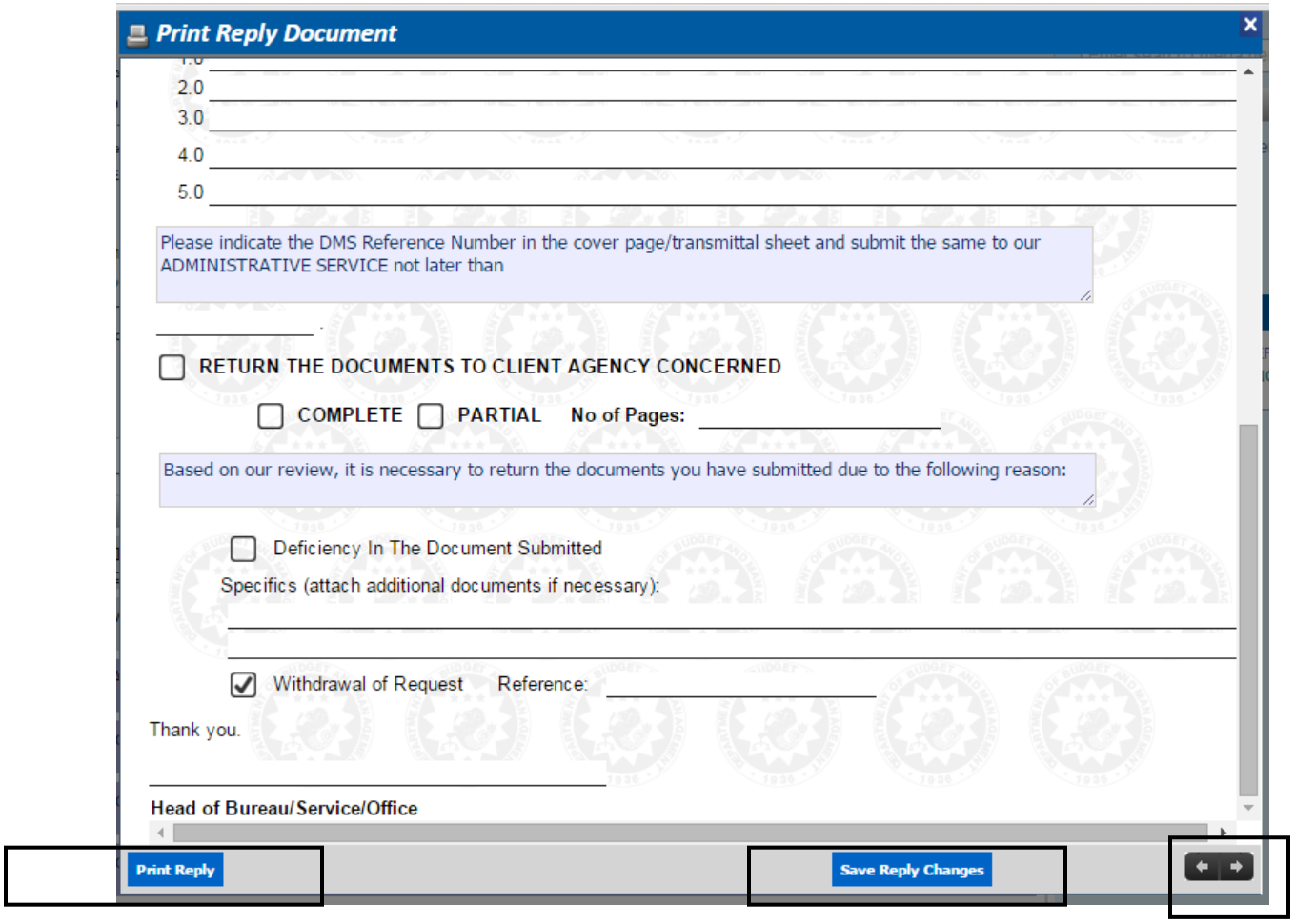
- Supply the email of the recipient and message, click **Send** to share.



6.5 Reply Document - This is used to Return, Withdraw, and Require Additional Supporting Documents in clients/agencies.

- To generate/show reply document, click the **Reply Document link** button found on the right part of the document tab.



- The **Print Reply Document** window will appear. Click **Edit Reply Content** to edit fields and click **Save info.**

- You can still make changes in reply document. After editing, click the **Save Reply Changes** and click **Print Reply** if you wish to print it. To view the changes that you made, click the right left arrows found on the lower right part of the print reply document window.