DDS Laravel Application - End User Operating Guide

Training Department

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Contents

1 Overview

This guide is designed for end users who will be operating the Document Distribution System (DDS) application on a daily basis. It covers all the essential workflows, features, and best practices to help you efficiently manage document distributions, invoices, and additional documents.

2 Getting Started

2.1 First Time Access

1. **Open your web browser** (Chrome, Firefox, Safari, or Edge)
2. **Navigate to**: `https://your-company-dds.com` (or the URL provided by your IT department)
3. **Login** using your company credentials
4. **Set your password** if prompted for first-time setup

2.2 Browser Requirements

- **Supported Browsers**: Chrome 90+, Firefox 88+, Safari 14+, Edge 90+
- **JavaScript**: Must be enabled for full functionality
- **Screen Resolution**: Minimum 1024x768, Recommended 1920x1080+
- **Pop-up Blockers**: Disable for this site to ensure proper functionality

3 Main Dashboard Overview

3.1 What You'll See

The main dashboard provides a **workflow-focused overview** of your department's document management status:

3.1.1 Critical Metrics (Top Section)

- **Pending Distributions**: Documents waiting to be sent or received
- **In-Transit**: Documents currently being transported
- **Overdue Documents**: Documents older than 14 days (requires immediate attention)
- **Unaccounted For**: Documents with unclear status or location

3.1.2 Document Age Breakdown

- **0-7 Days**: Recent documents (green - good)
- **8-14 Days**: Approaching deadline (yellow - attention needed)
- **15+ Days**: Overdue documents (red - urgent action required)

3.1.3 Quick Actions

- **Create Distribution**: Start a new document distribution
- **Receive Documents**: Mark documents as received
- **View Overdue**: See all overdue documents
- **Export Report**: Download current dashboard data

3.2 Understanding the Charts

3.2.1 Document Status Distribution (Doughnut Chart)

Shows the breakdown of documents by their current status:

- **Draft**: Documents being prepared
- **Verified by Sender**: Ready to send
- **Sent**: In transit to destination
- **Received**: Successfully delivered
- **Completed**: Fully processed

3.2.2 Document Age Trend (Line Chart)

Tracks document aging over time to identify trends and potential bottlenecks.

4 Managing Distributions

4.1 Creating a New Distribution

1. **From Dashboard**: Click ”Create Distribution” in Quick Actions
2. **Fill Required Fields**:
   - **Document Type**: Select from dropdown (Invoice, PO, etc.)
   - **Origin Warehouse**: Your current location
   - **Destination Warehouse**: Where documents should go

- **Priority**: High, Medium, or Low
- **Expected Delivery Date**: When documents should arrive

3. **Attach Documents**: Upload supporting files (PDF, Excel, etc.)
4. **Add Notes**: Any special instructions or comments
5. **Submit**: Click ”Create Distribution”

4.2 Tracking Distribution Status

4.2.1 Status Meanings

- **Draft**: Being prepared (you can still edit)
- **Verified by Sender**: Ready to send (contact logistics)
- **Sent**: In transit (track with tracking number)
- **Received**: Delivered to destination
- **Verified by Receiver**: Confirmed by recipient
- **Completed**: Fully processed

4.2.2 Actions You Can Take

- **Edit**: Modify details while in ”Draft” status
- **Send**: Change status to ”Sent” when documents leave
- **Update**: Add notes or change delivery date
- **Cancel**: Stop distribution if needed

4.3 Receiving Documents

1. **Check Incoming**: Look for distributions marked as ”Sent” to your location
2. **Verify Contents**: Ensure all expected documents are present
3. **Mark Received**: Change status to ”Received”
4. **Add Notes**: Document any issues or special conditions
5. **Verify**: Change status to ”Verified by Receiver”

5 Managing Invoices

5.1 Invoice Workflow Overview

The invoice system manages the complete lifecycle from creation to payment:

5.1.1 Invoice Statuses

- **Open**: New invoice created, pending verification
- **Verify**: Under review by authorized personnel
- **Return**: Sent back for corrections
- **SAP**: Processed in SAP system
- **Close**: Fully processed and closed
- **Cancel**: Cancelled invoice

5.2 Creating an Invoice

1. **Navigate to**: Invoices → Create New
2. **Fill Invoice Details**:
   - **Invoice Number**: Auto-generated or manual entry
   - **Supplier**: Select from dropdown or add new
   - **Amount**: Total invoice value
   - **Currency**: Select appropriate currency
   - **Due Date**: When payment is due
   - **Description**: Brief description of goods/services
3. **Attach Supporting Documents**: PO, delivery notes, etc.
4. **Submit for Verification**: Change status to ”Verify”

5.3 Processing Invoices

5.3.1 Verification Process

1. **Review Details**: Check all information is correct
2. **Verify Amounts**: Confirm calculations and supporting documents
3. **Approve or Return**: Either approve or return for corrections

4. **Add Comments**: Document any decisions or notes

5.3.2 SAP Integration

- **Status Change**: Change to ”SAP” when processing in SAP
- **Reference Number**: Add SAP reference number
- **Update Notes**: Document any SAP-specific information

6 Managing Additional Documents

6.1 Document Types and Sources

Additional documents support the main workflows and include:

6.1.1 Common Document Types

- **ITO Documents**: Internal Transfer Orders
- **PO Documents**: Purchase Order supporting materials
- **GRPO Documents**: Goods Receipt Purchase Order
- **Custom Documents**: Any other supporting materials

6.1.2 Document Statuses

- **Available**: Document is ready for use
- **In Transit**: Being moved between locations
- **Distributed**: Assigned to specific distributions
- **Unaccounted For**: Status unclear or location unknown

6.2 Adding New Documents

1. **Navigate to**: Additional Documents → Create New
2. **Select Document Type**: Choose from predefined types
3. **Upload File**: Select document file (PDF, Excel, Word, etc.)
4. **Fill Metadata**:
   - **ITO Number**: Related internal transfer order
   - **PO Number**: Associated purchase order
   - **Origin Warehouse**: Where document originated

- **Destination**: Where document should go

5. **Submit**: Create the document record

6.3 Linking Documents to Invoices

1. **From Invoice**: Go to invoice details page
2. **Click "Link Documents"**: Opens document selection
3. **Search Documents**: Use PO number or other criteria
4. **Select Documents**: Choose relevant supporting documents
5. **Confirm Link**: Establish the relationship

7 Search and Filtering

7.1 Finding What You Need

7.1.1 Global Search

- **Search Bar**: Top of every page
- **Search By**: Document number, PO number, supplier name, etc.
- **Results**: Shows matches across all modules

7.1.2 Advanced Filtering

- **Date Ranges**: Filter by creation, due, or delivery dates
- **Status Filters**: Show only documents in specific statuses
- **Location Filters**: Filter by warehouse or department
- **User Filters**: Show documents created by specific users

7.1.3 Saved Searches

- **Save Filters**: Save commonly used search criteria
- **Quick Access**: Apply saved searches with one click
- **Share**: Share search criteria with team members

8 Using Feature-Specific Dashboards

8.1 Distributions Dashboard

Access via: **Distributions** → **Dashboard**

8.1.1 What You'll See

- **Status Overview**: Count of documents in each status
- **Workflow Performance**: Average time in each stage
- **Pending Actions**: What needs your attention
- **Department Performance**: How your team is performing
- **Recent Activity**: Latest distribution activities

8.1.2 Key Metrics

- **Average Processing Time**: How long distributions typically take
- **Bottleneck Identification**: Which stages are slowest
- **Success Rate**: Percentage of successful deliveries

8.2 Invoices Dashboard

Access via: **Invoices** → **Dashboard**

8.2.1 Financial Overview

- **Total Outstanding**: Amount of unpaid invoices
- **Payment Rate**: Percentage of invoices paid on time
- **Processing Metrics**: Average time from creation to payment
- **Supplier Analysis**: Performance of different suppliers

8.2.2 Action Items

- **Overdue Invoices**: Invoices past due date
- **Pending Approvals**: Invoices waiting for verification
- **SAP Processing**: Invoices ready for SAP integration

8.3 Additional Documents Dashboard

Access via: **Additional Documents** → **Dashboard**

8.3.1 Document Analytics

- **Type Breakdown**: Distribution of document types
- **Age Analysis**: How long documents have been in system
- **Location Tracking**: Where documents are currently located
- **PO Analysis**: Documents linked to purchase orders

9 Handling Common Issues

9.1 Document Overdue (15+ Days)

9.1.1 Immediate Actions

1. **Check Status**: Verify current location and status
2. **Contact Stakeholders**: Reach out to sender or recipient
3. **Update Notes**: Document what you've done
4. **Escalate**: Notify supervisor if issue persists

9.1.2 Prevention

- **Regular Monitoring**: Check dashboard daily
- **Proactive Communication**: Contact recipients before due date
- **Status Updates**: Keep distribution status current

9.2 Missing or Lost Documents

9.2.1 Search Steps

1. **Check All Locations**: Search in all warehouses
2. **Review Recent Activity**: Look at recent status changes
3. **Contact Team Members**: Ask if anyone has seen the document
4. **Mark as Unaccounted**: Update status if location unknown

9.2.2 Recovery Process

1. **Document Incident**: Record what happened
2. **Request Replacement**: Ask sender for duplicate if needed
3. **Update Records**: Keep system current with actual status

9.3 System Errors or Issues

9.3.1 What to Do

1. **Don't Panic**: Most issues are temporary
2. **Refresh Page**: Try refreshing your browser
3. **Check Browser**: Ensure JavaScript is enabled
4. **Contact IT**: Report persistent issues

9.3.2 Information to Provide

- **Error Message**: Copy the exact error text
- **What You Were Doing**: Describe the action that caused the error
- **Browser Details**: Which browser and version you're using
- **Time**: When the error occurred

10 Mobile Usage Tips

10.1 Mobile-Friendly Features

- **Responsive Design**: Dashboard adapts to mobile screens
- **Touch Controls**: Optimized for touch interaction
- **Key Functions**: All essential features work on mobile

10.2 Mobile Best Practices

- **Landscape Mode**: Use landscape for better viewing
- **Zoom**: Pinch to zoom for detailed information
- **Notifications**: Enable browser notifications for updates

11 Security and Best Practices

11.1 Password Security

- **Strong Passwords**: Use complex passwords with numbers and symbols
- **Regular Changes**: Change password every 90 days
- **No Sharing**: Never share your login credentials
- **Logout**: Always logout when leaving your computer

11.2 Data Protection

- **Confidential Information**: Don't share sensitive data outside the system
- **Screen Privacy**: Be aware of who can see your screen
- **Document Handling**: Follow company document security policies
- **Export Limits**: Only export data you're authorized to access

11.3 System Usage

- **Authorized Access**: Only access areas you have permission for
- **Data Accuracy**: Ensure information you enter is correct
- **Regular Updates**: Keep your browser updated
- **Report Issues**: Report suspicious activity immediately

12 Getting Help

12.1 Self-Service Resources

- **Help Documentation**: Available in the system
- **Video Tutorials**: Step-by-step guides for common tasks
- **FAQ Section**: Answers to frequently asked questions

12.2 Contact Information

- **IT Support**: For technical issues (system errors, access problems)
- **Process Support**: For workflow questions and training
- **Supervisor**: For approval and escalation issues

12.3 Emergency Contacts

- **System Down**: Contact IT immediately
- **Data Loss**: Report to supervisor and IT
- **Security Breach**: Contact IT and security team

13 Training and Development

13.1 Available Training

- **New User Orientation**: Basic system overview
- **Advanced Workflows**: Complex process training
- **Refresher Sessions**: Periodic updates and reminders
- **Role-Specific Training**: Tailored to your job function

13.2 Learning Resources

- **User Manuals**: Detailed process documentation
- **Video Library**: Recorded training sessions
- **Practice Environment**: Safe area to learn new features
- **Mentor Program**: Learn from experienced users

14 Regular Maintenance Tasks

14.1 Daily Tasks

- **Check Dashboard**: Review pending items and alerts
- **Update Status**: Keep document statuses current
- **Respond to Notifications**: Address any system alerts

14.2 Weekly Tasks

- **Review Overdue Items**: Check for documents past due
- **Clean Up Drafts**: Remove or complete draft documents
- **Update Notes**: Add relevant information to active items

14.3 Monthly Tasks

- **Performance Review**: Assess your workflow efficiency
- **Process Improvement**: Identify areas for optimization
- **Training Updates**: Attend any new training sessions

15 Success Metrics

15.1 Key Performance Indicators

- **Document Processing Time**: How quickly you handle documents
- **Error Rate**: Minimize mistakes and corrections
- **Response Time**: How quickly you respond to requests
- **User Satisfaction**: Feedback from colleagues and stakeholders

15.2 Continuous Improvement

- **Process Optimization**: Look for ways to work more efficiently
- **Feedback Collection**: Share ideas for system improvements
- **Best Practices**: Learn from successful colleagues
- **Training Participation**: Stay current with system updates

Document Metadata

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16 Quick Reference Cards

16.1 Essential Keyboard Shortcuts

- **Ctrl** + **F**: Find text on page
- **Ctrl** + **R**: Refresh page
- **Ctrl** + **S**: Save (when available)
- **F5**: Refresh page
- **Esc**: Close dialogs or cancel actions

16.2 Common Status Changes

- **Draft** → **Verify**: Ready for review
- **Verify** → **Return**: Needs corrections

- **Verify** → **SAP**: Ready for SAP processing
- **Sent** → **Received**: Documents delivered
- **Received** → **Verified**: Confirmed by recipient

16.3 Emergency Procedures

1. **System Error**: Refresh page, contact IT if persistent
2. **Data Loss**: Stop working, contact supervisor and IT
3. **Security Issue**: Logout immediately, contact IT
4. **Access Denied**: Contact supervisor for permissions

16.4 Contact Quick Reference

- **IT Support**: support@company.com | Ext: 1234
- **Process Support**: training@company.com | Ext: 5678
- **Emergency**: +1-XXX-XXX-XXXX
- **System Status**: `status.company.com`