Document Management System

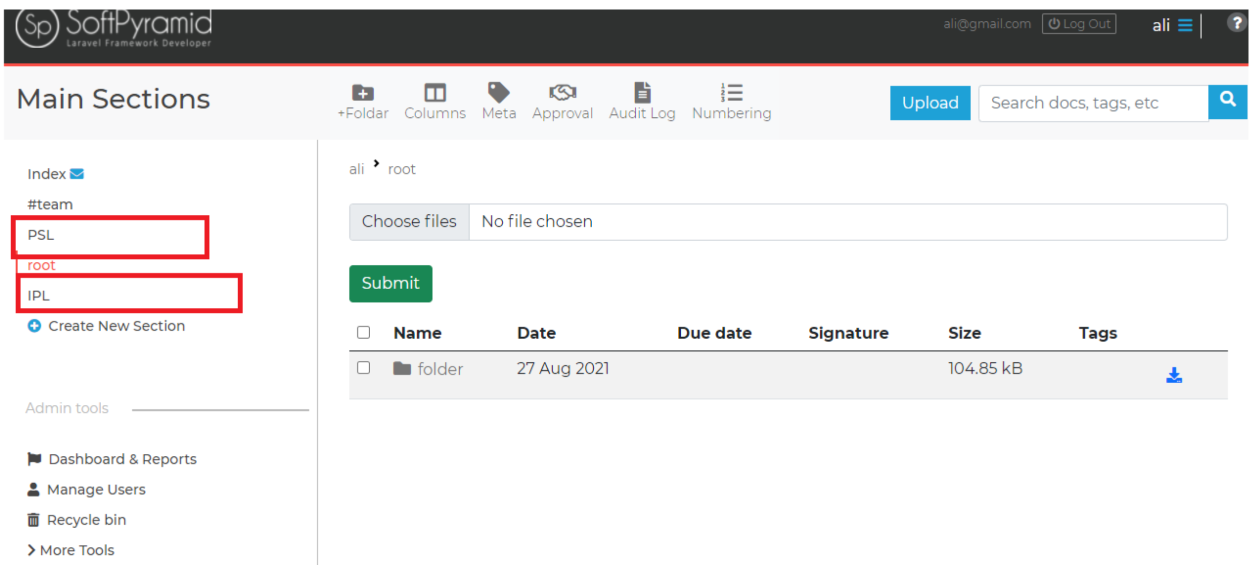
(user manual)

Registration

The e-mail address you use as your user name will be the owner and the (first) administrator of the account. It is recommended to use an email address (*info@gmail.com* etc.) for the account's owner user name.

Managing the Main Sections

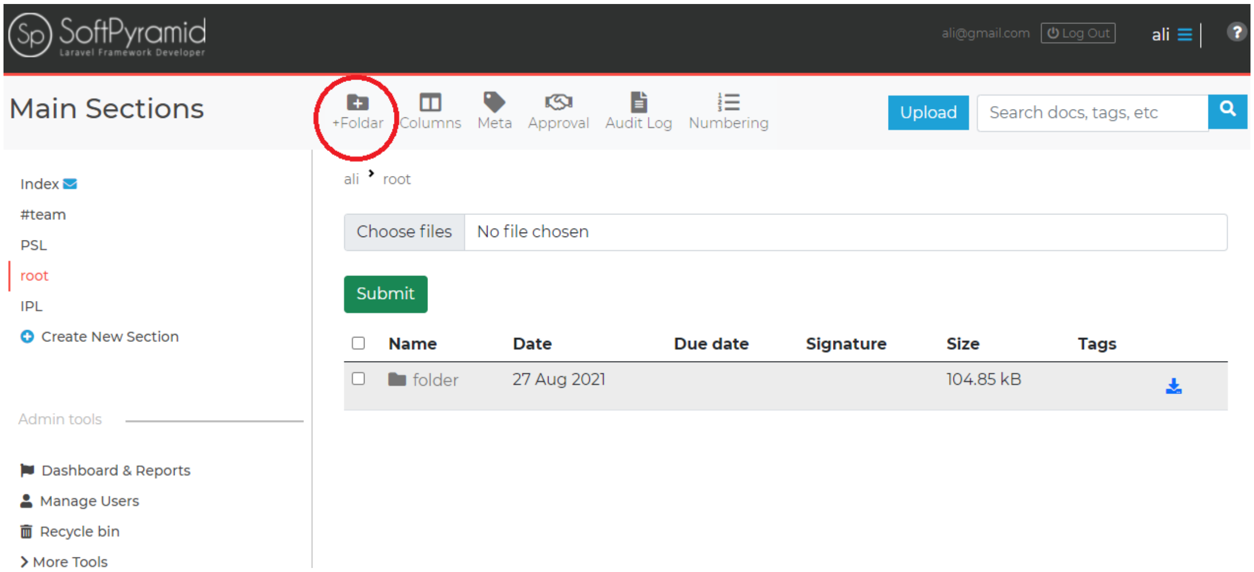
Main Sections are the top-level folders displayed on the left side of the system. All other sections are there by default to give you an idea how you could structure your DMS. But they are merely suggestions and can be ***deleted***, ***renamed*** while you can also ***create*** new sections. As highlighted below,



Creating Folder Structure

You have two types of folders in DMS. The very highest level of folders is called Main Sections — the main folders that are always visible for you on the left side.

Under the Main Sections you can create almost unlimited folder structure — folders within folders within folders. Just click on the '+Folder' button on the toolbar to create a new folder to where you currently are.



Uploading Files

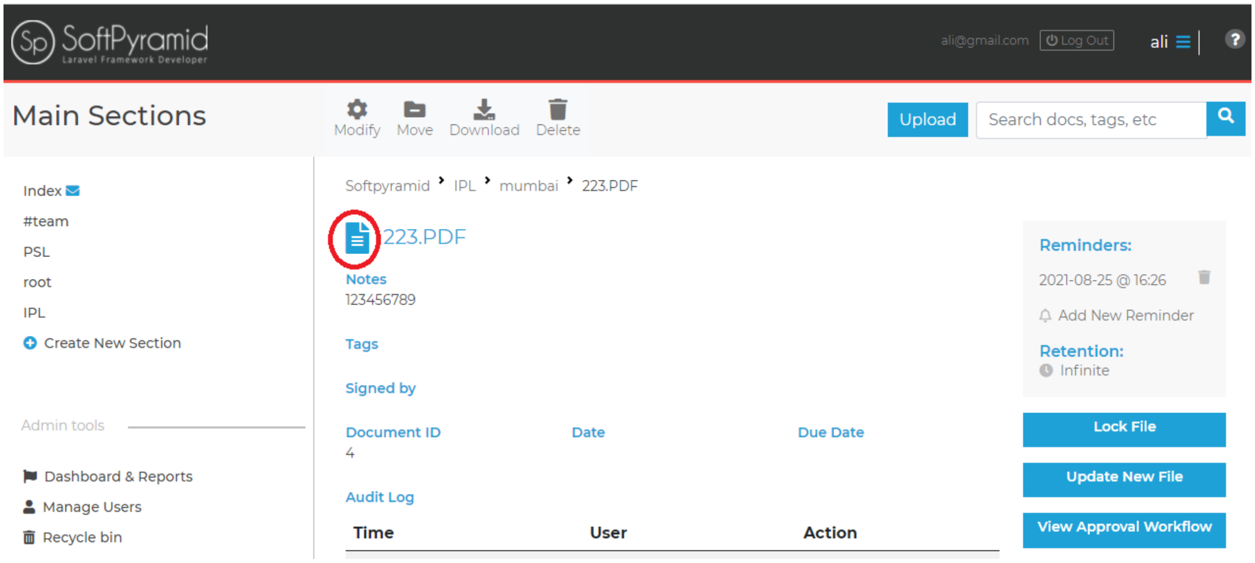
You can upload any file to DMS, txt, pdf, jpeg and png etc.

To upload files, click the ‘Upload’ button. You can upload files one-by-one or multiple at a time. You can’t upload folders directly, so you need to create the folder hierarchy in DMS and upload files into the folders or, if you have a lot of folders and sub-folder, you can upload file any one of folder.

Previewing Files

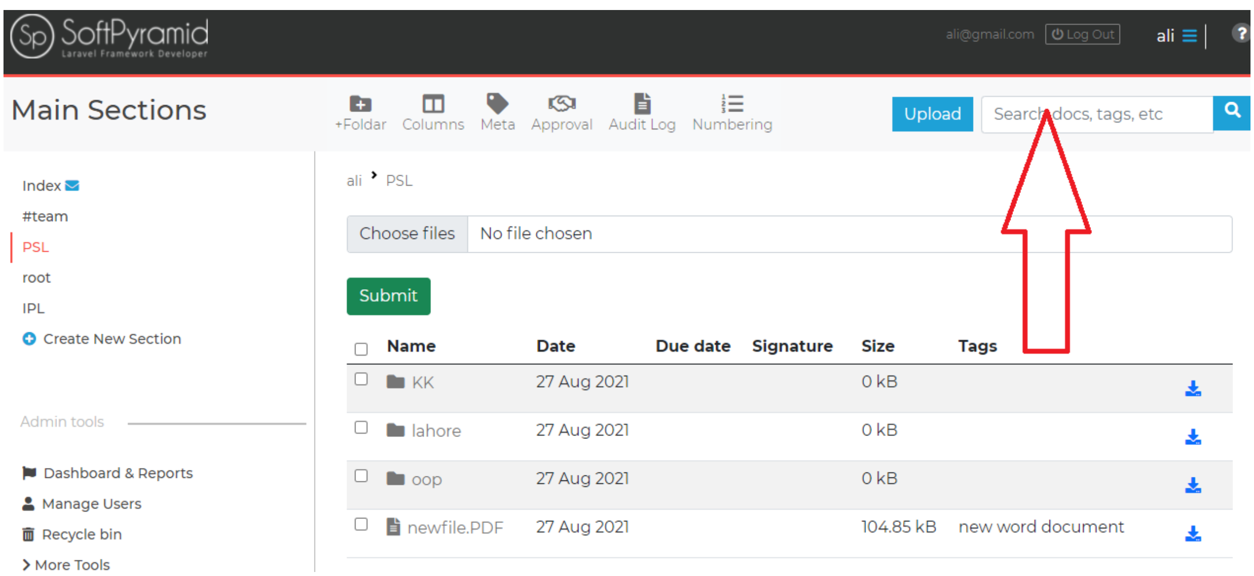
After you have uploaded a file to DMS, the background process starts to generate a preview file of it which can be seen in-system without the need to download the file first. Preview is generated for PDF, JPG, PNG, GIF, Doc, Docx files among others.

Preview generation can take some time, depending also on the file size and the number of files concurrently uploaded. You can refresh the page to see if the previews have been generated. It usually happens within a minute but sometimes the queue can be longer so please check back later. Preview is instantly available for PDF files. click on file icon for view file



Searching

Search gives you quick live results as you type something to the search input field and click on the Search button. Only the results that are found in file name and metadata will be displayed as results.



Audit Log of all account events

This allows you to see the account's total audit log. To access it, log in as an account administrator, locate the **Admin Tools** in the lower left side and click on More Tools > Audit Log.

From there, you can filter the events based on date, user, scope (file, folder, account), or any of the specific actions.

You can, for example:

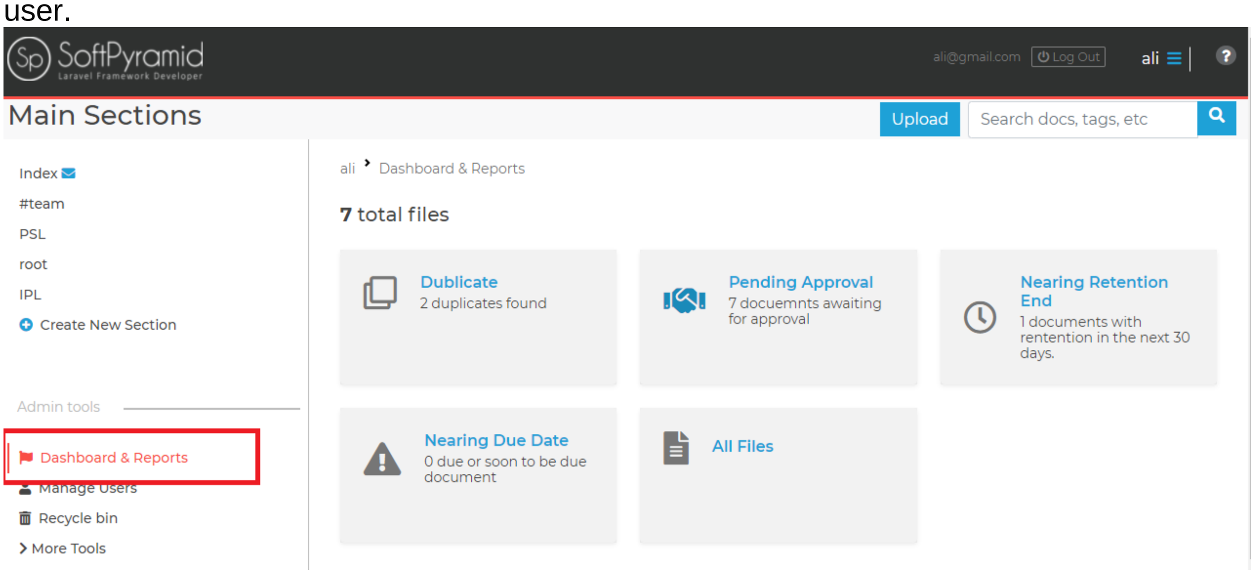
- See a list of all actions taken by a certain user
- See a list of all deleted files/folders from last Tuesday
- See a list of all downloaded files on a certain date
- See a list of all relocated folders
- See a list of all account level events like new users added or removed from the system

Dashboard and Reports

Account administrators can access '*Dashboard & Reports*' view to have an overview of all files in the system and their status.

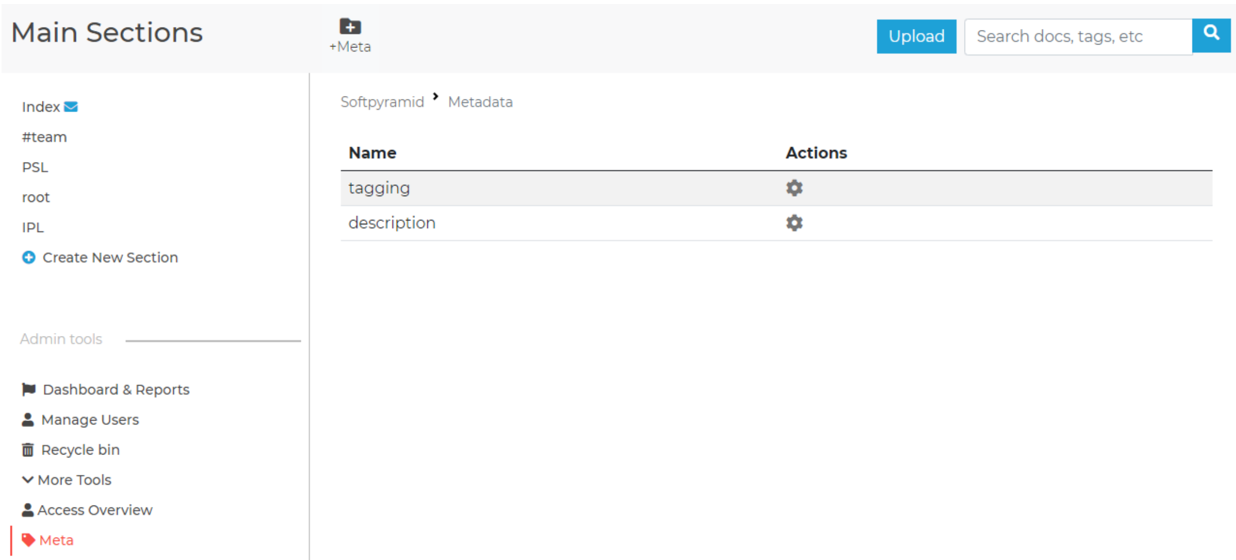
From Dashboard you can see:
– Duplicate Report
– Documents that are pending approval
– Documents that are nearing their retention end
– Documents that are nearing (or have exceeded) their due date
– Total report of all your files in the system.

All reports can be exported as .XLSX files. To access the dashboard log in with any Admin user.



Manage all custom metadata fields

Whenever you create a custom metadata field to add to a file or to apply as a template for all the files in a folder, there's a central place to overview all those fields. Log in as an account administrator, click on 'More tools' in Admin Tools section and then 'Metadata'.



Clicking on the **gear icon** next to a custom metadata field displays **options**: Edit and Delete.

Editing allows you to change the name of the metadata field. This will affect the field's name on every file the field was applied on.
Delete allows you to delete the field. This will remove the field from every file it was displayed on.

Recycle Bin

Recycle Bin is part of Admin Tools, which means it is only accessible to your account's administrators.

Every file, folder or Main Section you or any of your collaborator deletes will not be permanently deleted at first but moved to the Recycle Bin. You have 30 days to restore them from the Recycle Bin before they are automatically deleted from there.

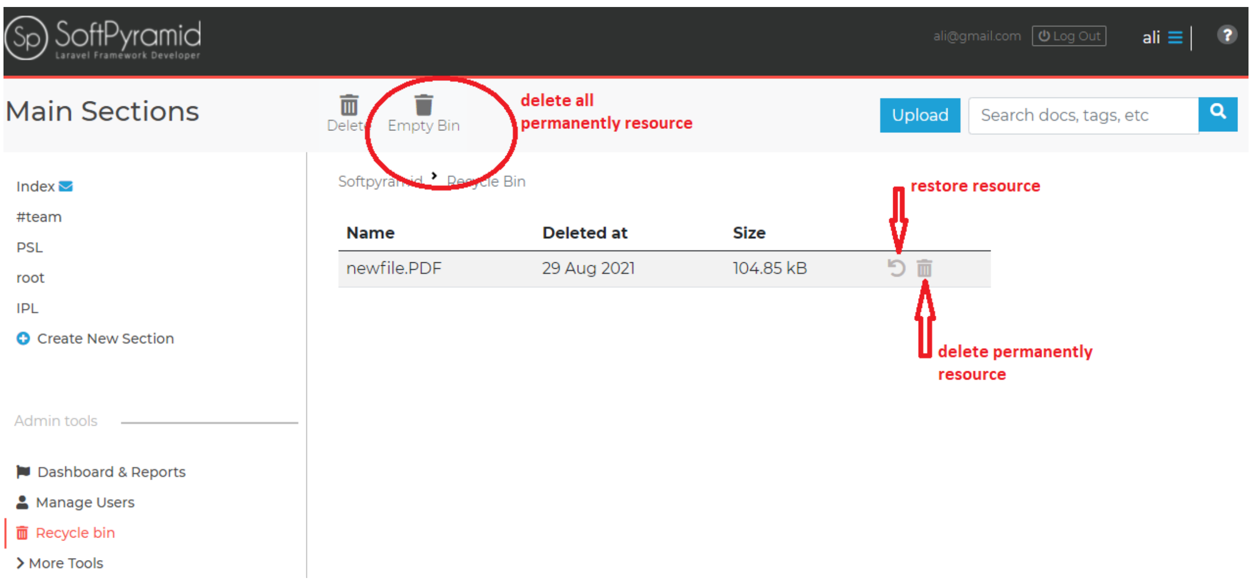
Restoring file/folder/section from Recycle Bin:

1. Log in with account administrator's user
2. Click on the Recycle Bin in Admin tools
3. Click on the Restore icon (circular arrow) on the right side of a resource you want to restore

4. Pick a location to where you want to restore the resources. By default its last location is displayed unless the location does not exist any more.
5. Click on Restore

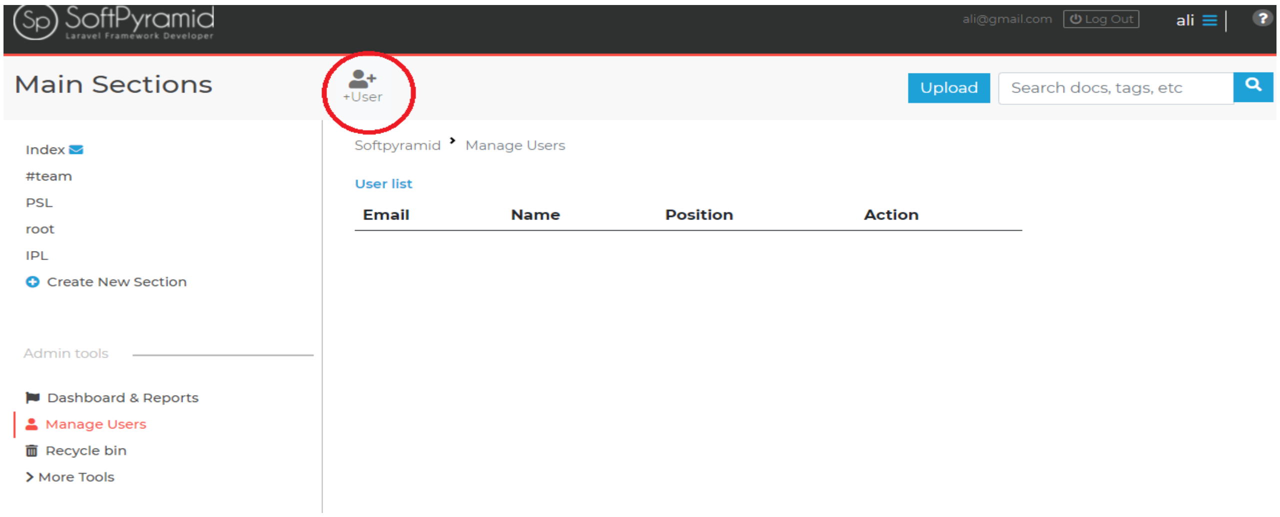
To permanently delete resources from Recycle Bin:

1. Log in with account administrator's user
2. Click on the 'Recycle Bin' in Admin tools
3. Click on the right side Trash Bin icon next to a resource to permanently delete it OR select multiple resources with checkboxes and click on 'Delete' button on the toolbar.
   To empty the whole Recycle Bin at once, permanently removing all its content, click on the 'Empty Bin' button on the toolbar.



Adding Users

Users are your team members that can have access to your account in the capacity you decide all your team members will have access for which you assign roles (admin(both), editor and viewer)

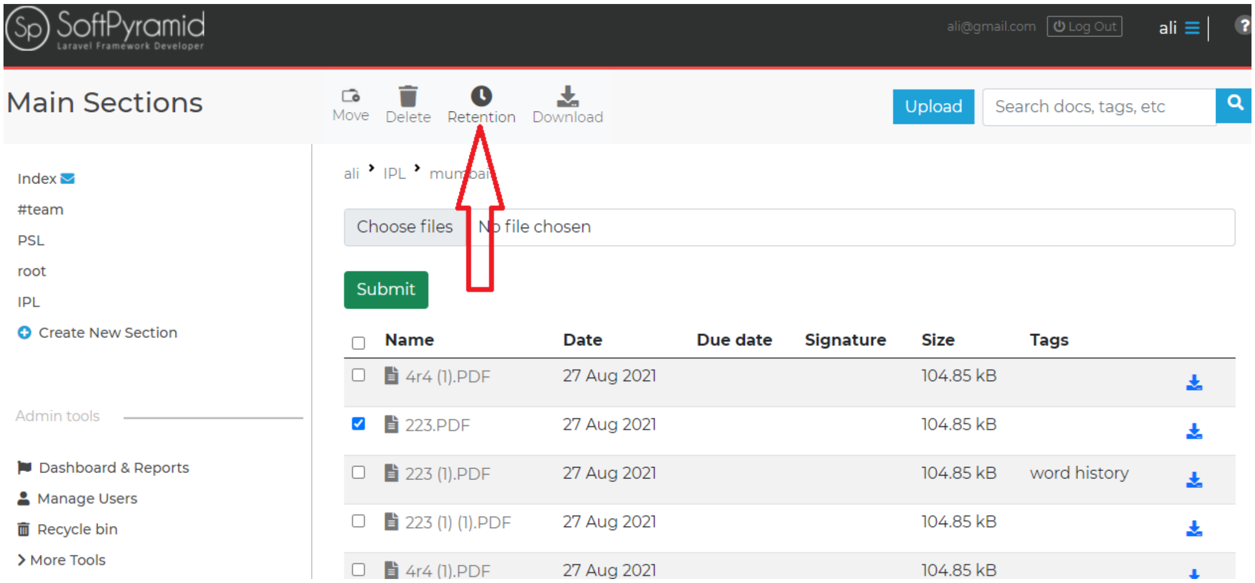


Retention Automation

By default all your files are stored infinitely. But you can easily add a custom retention period for files in any folder, or for specific single files. The documents will then be automatically moved to recycle bin based on your settings after they have reached a certain age.

To set up retention period for all files:

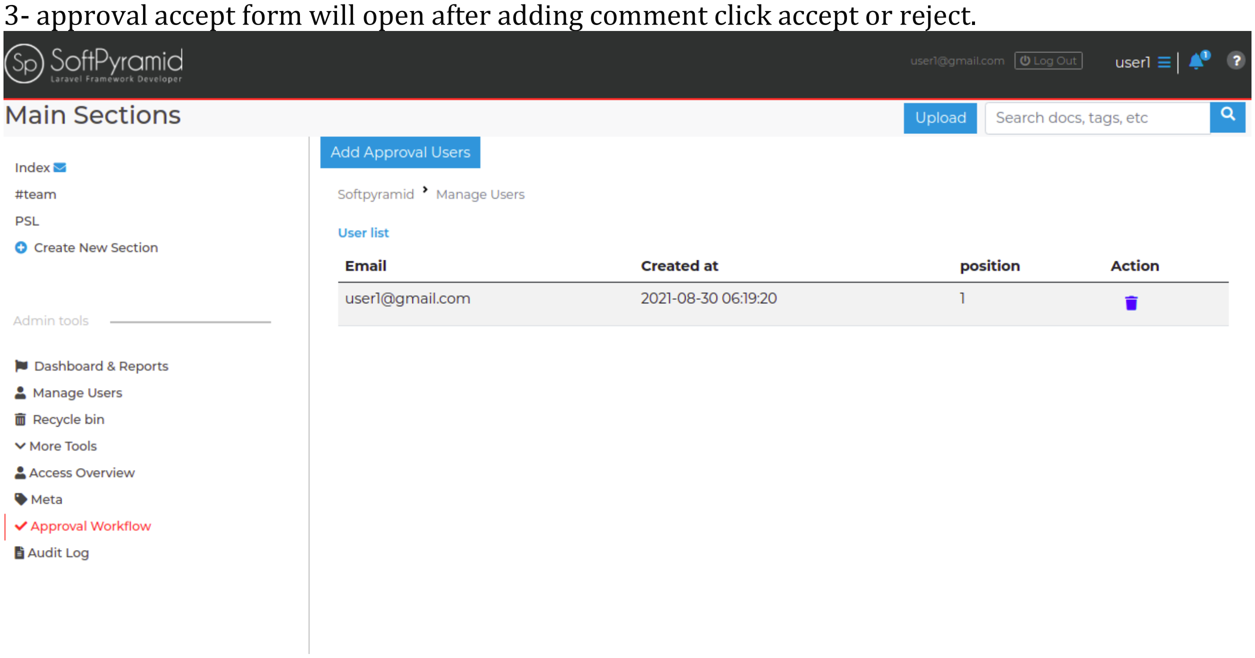
1. Locate the folder in the list view
2. Click on the any file located in folder.
3. Choose 'Retention' from the list as show in pic below.
4. After click on this 'Retention' a form will open. Click 'days', 'weeks', 'months' or 'years' for set retention period.
5. Choose action: sending to recycle bin.
6. Click 'Save'.



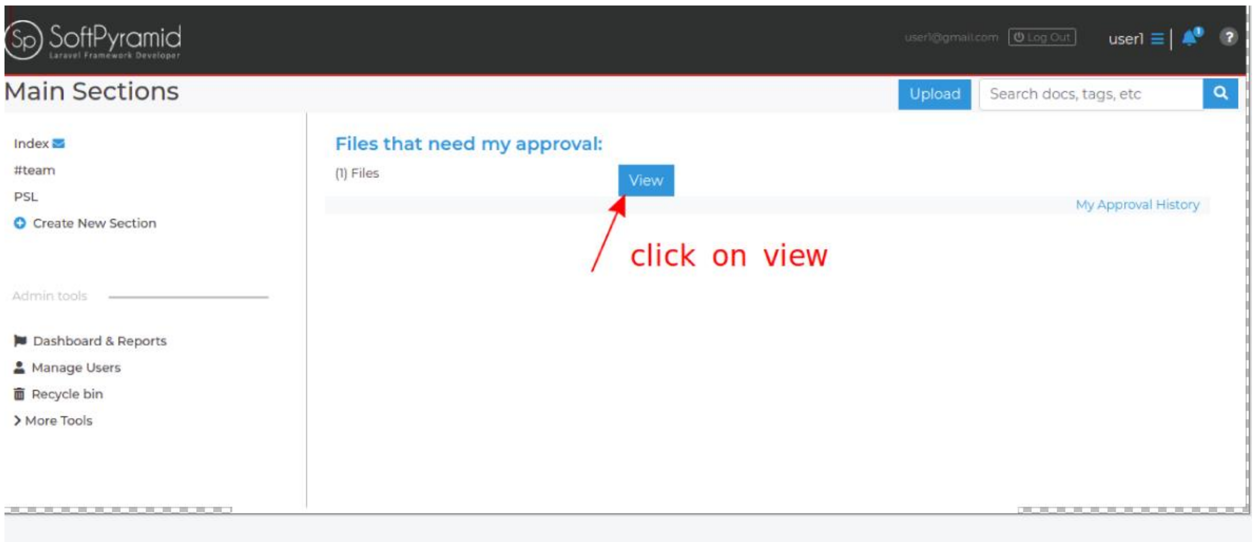
Document Approval Workflow

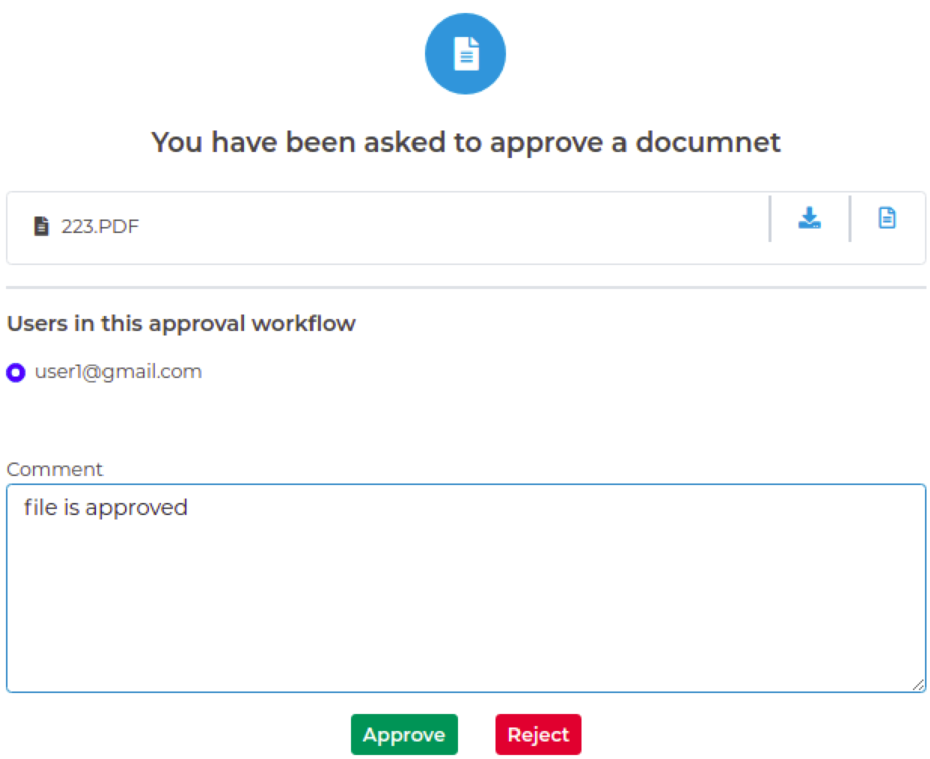
For document approval login as admin select approval workflow and click on 'Add Approval Users' add users for approve files as shown below.

1-click on view.
2-click on file.
3- approval accept form will open after adding comment click accept or reject.



Add files located in folders under section part, notification will appear on top right side to first user in approval workflow. click on 'notification' icon, under 'Files that need my approval' pending files located.

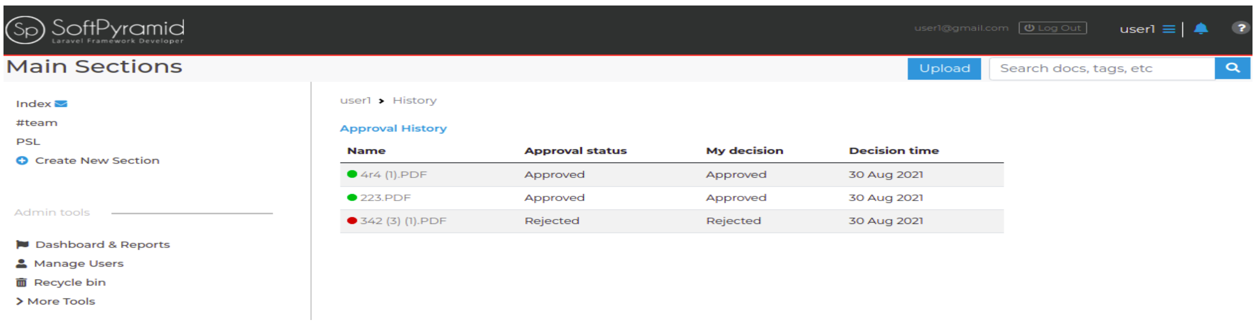

SoftPyramid
Laravel Framework Developer
user1@gmail.com
Log Out
user1
Main Sections
Upload
Search docs, tags, etc
Index
#team
PSL
Create New Section
Admin tools
Dashboard & Reports
Manage Users
Recycle bin
More Tools
Files that need my approval:
(1) Files
View
My Approval History
click on view


You have been asked to approve a documnet
223.PDF
Users in this approval workflow
user1@gmail.com
Comment
file is approved
Approve
Reject

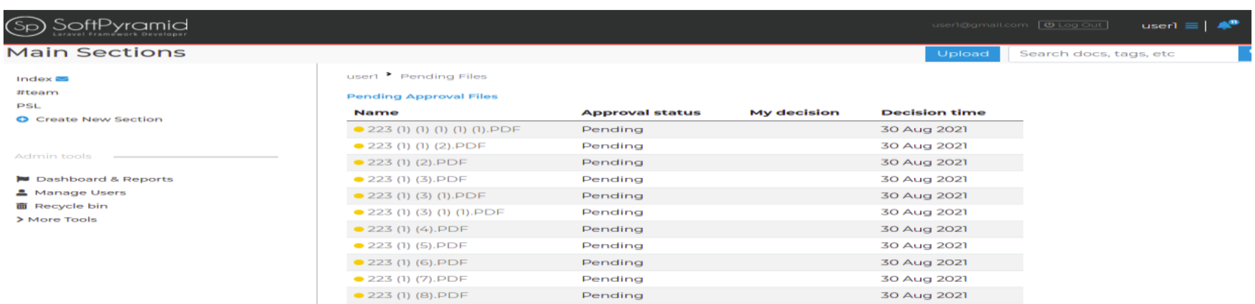
It Serial workflow— approvers will receive the notification one-by-one, in the order you add them. The approver next in line will only receive the notification to approve the document once the previous person has approved it. If the previous person rejects the document or does not answer, the

document workflow will not move ahead.

After a person has either approved or rejected the document you can see their decision, date/time and optional comment they could have left. Click the blue 'View approval



workflow' button on file view page to see the current state of approvals.



●**Red dot** means the person has rejected the document.

●**Green dot** means the person has approved the document.

●**Yellow dot** in front of the invited approver marks the invitation to approve has been sent but no decision has been made by the person or simply mean file is still in pending state.