

Ministry of Trade, Industry and Cooperatives

eDocs+ System Administration Training

Info Consults International Ltd
October 2022

Content Outline

- **User Login Process**
- **System configuration management**
 - o **Creating directorates**
 - Creating departments
 - Creating organization titles
 - Creating the organization structure
 - Creating repositories
- **User configuration management**
 - Creating and editing user information (password reset)
 - Creating groups
 - Adding users to a group
 - Adding permissions to a group
- **Permissions and privileges management**
 - o **Adding permissions**
 - Editing permission
- **Tickets management**
 - o **Creating tickets**
- **Backup and recovery**
- **Viewing Reports and Dashboards**
 - Summary (Tabular format)
 - Graphical
- **Audit Trails**

Introduction

- The eDocs+ is a web-based software application designed for managing electronic records and all records management processes in an organisation
- eDocs+ supports all popular operating systems such as Windows, Linux among others.
- The system is designed to capture, store, track and route records from the point of creation or entry into the Organisation throughout their lifecycle until they are either disposed of or permanently retained for archival value.

User Login Process

Requirements:

- Official email address
- Password

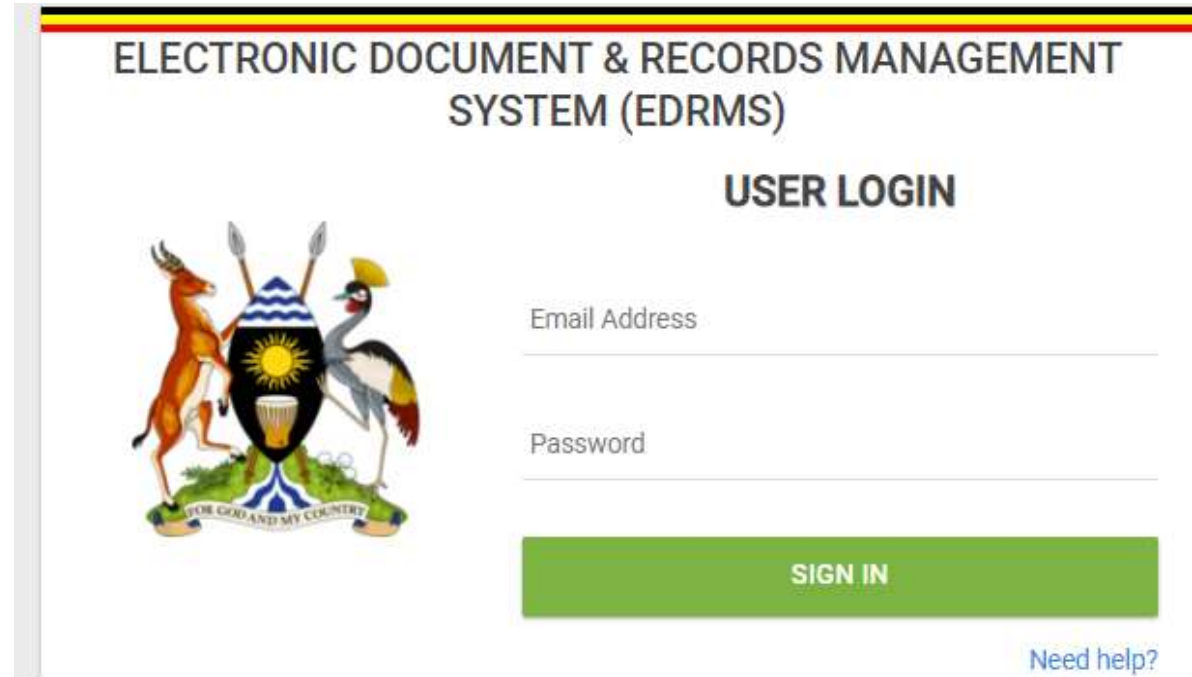
Visit the site using a web browser

Demo site : edocsplus.info

System admins account :

Helen.nekesa@edocs.go.ug

Password: edocs2021



The screenshot shows the login interface for the Electronic Document & Records Management System (EDRMS). At the top, the title "ELECTRONIC DOCUMENT & RECORDS MANAGEMENT SYSTEM (EDRMS)" is displayed in a bold, black font. Below the title, the text "USER LOGIN" is centered. To the left of the login fields is the national coat of arms of Uganda, which features a shield with a sun, a traditional drum, and two spears, flanked by a rearing antelope and a stork. Below the coat of arms is the motto "FOR GOD AND MY COUNTRY". To the right of the coat of arms, there are two input fields: "Email Address" and "Password". Below these fields is a green rectangular button labeled "SIGN IN". At the bottom right of the page, there is a blue link that says "Need help?".

System configuration management

Creating Directorates

Visit the menu, click on settings then directorates, click on the plus button to create a single directorate or excel button to add multiple using an excel document.

The screenshot displays the EDOCSTRAINING system configuration interface. The sidebar menu on the left includes options like 'My Tasks', 'My Files', 'Access Requests', 'Search', 'Reports', 'Delegate Tasks', and 'Settings'. The 'Settings' option is highlighted, and a blue arrow points to it. Below 'Settings', a list of configuration categories is shown, including 'Directorates', 'Heads of Directorates', 'Departments', 'Heads of Department', 'Dept. File Prefixes', 'Users', 'Groups', 'Permissions', 'Organisation Titles', and 'Organisation Structure'. The main content area shows the 'Directorates' configuration page. It features a header with 'EDOCSTRAINING' and a user profile 'Hellen Nekesa'. The breadcrumb trail is 'Home > Settings > Directorates'. A blue button labeled 'AVAILABLE DIRECTORATES' is at the top left of the main content area. Below it, there is a table with columns for 'Code', 'Directorate', 'Total Departments', and 'Action'. The table contains one entry: 'DHRM' for 'Directorate of Human Resource Management' with '1' total department. A search bar is located to the right of the table. At the bottom of the table, it says 'Showing 1 to 1 of 1 entries'. A blue arrow points to the bottom right of the main content area, where there are two green circular buttons: a plus sign (+) and an Excel icon (X). The footer of the page includes the copyright notice '© 2019-2022 All Rights Reserved edocs+ v1.0.1' and the date 'Mon Oct 24 2022 16:37:19 GMT+0300 (East Africa time)'.

Code	Directorate	Total Departments	Action
DHRM	Directorate of Human Resource Management	1	

Creating departments

Visit the menu, click on settings then departments, click on the plus button to create a single department or excel button to add multiple using an excel document.

The screenshot displays the EDOCSTRAINING web application interface. On the left, a sidebar menu lists various navigation options, with 'Settings' expanded and 'Departments' selected. The main content area shows the 'AVAILABLE DEPARTMENTS' section, which includes a table with columns for Department, Directorate, Users, Files, and Action. The table lists one entry: 'HRM - Human Resource Planning and Development' under the 'Directorate of Human Resource Management'. At the bottom right of the interface, there are two green circular buttons: a plus sign (+) and an Excel icon (X). A blue arrow points from the text in the instructions to the plus button.

My Tasks
My Files
Access Requests
Search
Reports
Delegate Tasks
Settings
Directorates
Heads of Directorates
Departments
Heads of Departments
Dept. File Prefixes
Users
Groups
Permissions
Organisation Titles
Organisation Structure

EDOCSTRAINING

Home > Settings > Departments

AVAILABLE DEPARTMENTS

Show 10 entries

Search:

Department	Directorate	Users	Files	Action
HRM - Human Resource Planning and Development	Directorate of Human Resource Management	0	0	

Showing 1 to 1 of 1 entries

Previous 1 Next

© 2019-2022 All Rights Reserved edocs+ v1.0.1

Mon Oct 24 2022 16:44:45 GMT+0300 (East Africa time)

Creating organization titles

Visit the menu, click on settings then organization titles, click on the plus button to create a single organization title or excel button to add multiple using an excel document.

The screenshot shows the EDOCSTRAINING application interface. The left sidebar contains a menu with the following items: My Tasks, My Files, Access Requests, Search, Reports, Delegate Tasks, and Settings. The Settings menu is expanded, showing sub-items: Directorates, Heads of Directorates, Departments, Heads of Departments, Dept. File Prefixes, Users, Groups, Permissions, Organisation Titles, and Organisation Structure. A blue arrow points from 'Organisation Titles' in the sidebar to the main content area.

The main content area displays the 'ORGANISATION TITLES' page. At the top, there is a breadcrumb trail: Home > Settings > Organisation Titles. Below this, there is a table with the following columns: Acronym, Title, Level, Slots, Used, and Action. The table contains two entries:

Acronym	Title	Level	Slots	Used	Action
COM	Commissioner	3	3	1	⋮
PS	Permanent Secretary	1	1	1	⋮

Below the table, there is a pagination bar showing 'Showing 1 to 2 of 2 entries'. At the bottom right of the table, there are two buttons: a green plus button (+) and a green button with an Excel icon (X).

The footer of the application shows the copyright notice: © 2019-2022 All Rights Reserved edocs+ v1.0.1. The date and time are displayed as Mon Oct 24 2022 16:47:00 GMT+0300 (East Africa Time).

Creating An organization structure

Visit the menu, click on settings then organization structure, click on the plus button to create a single organization structure, then a modal loads click on the title to select and the title they report to below.

The screenshot displays the EDOCTRaining application interface. On the left is a sidebar menu with options: Dashboard, My Tasks, My Files, Access Requests, Search, Reports, Delegate Tasks, and Settings. The 'Settings' menu is expanded, showing sub-options: Directorates, Heads of Directorates, Departments, Heads of Departments, Dept. File Prefixes, Users, Groups, Permissions, Organisation Titles, and Organisation Structure. The main content area shows the 'Organisation Structure' page with a table of existing structures. A blue arrow points from the 'Organisation Structure' menu item in the sidebar to the table. A green plus button is located at the bottom right of the table, with a blue arrow pointing to it. A modal titled 'ADD STRUCTURE' is open on the right, showing a list of titles with 'Permanent Secretary (PS)' selected. Below the list is a 'Select Reporting to' dropdown and a green 'ADD STRUCTURE' button. The footer contains copyright information and a timestamp.

EDOCTRaining

Home > Settings > Organisation Structure

ORGANISATION STRUCTURE

Show 10 entries Search:

Title	Reports To	Action
COM- Commissioner	PS - Permanent Secretary	

Showing 1 to 1 of 1 entries

Previous 1 Next

ADD STRUCTURE

Permanent Secretary (PS)

Select Reporting to

ADD STRUCTURE

© 2019-2022 All Rights Reserved edocs+ v1.0.1

Mon Oct 24 2022 18:19:26 GMT+0300 (East Africa Time)

Creating users

Visit the menu, click on settings then users, click on the plus button to create a user

SYSTEM USERS

Show 10 entries Search:

Name	Position/Title	Email	Phone	Status	Action
Hellen Nekesa		hellen.nekesa@edocs.com	256772516450	Active	
Mr. Adam Joe	COM	adam.joe@edocs.com	256772516400	Active	⋮
Ms. Vivian Jene	PS	ps@edocs.com	256772510000	Active	⋮
Name	Position/Title	Email	Phone	Status	Action

Showing 1 to 3 of 3 entries

Previous 1 Next

© 2019-2022 All Rights Reserved edocs+ v1.0.1 Mon Oct 24 2022 18:27:26 GMT+0300 (East Africa Time)

Creating groups

Visit the menu, click on settings then groups, click on the plus button to create a group.

- Dashboard
- My Tasks
- My Files
- Access Requests
- Search
- Reports
- Delegate Tasks
- Settings
 - Directorates
 - Heads of Directorates
 - Departments
 - Heads of Departments
 - Dept. File Prefixes
 - Users
 - Groups
 - Permissions
 - Organisation Titles

EDOCSTRAINING

Home > Settings > Groups

AVAILABLE GROUPS

Show 10 entries

Search:

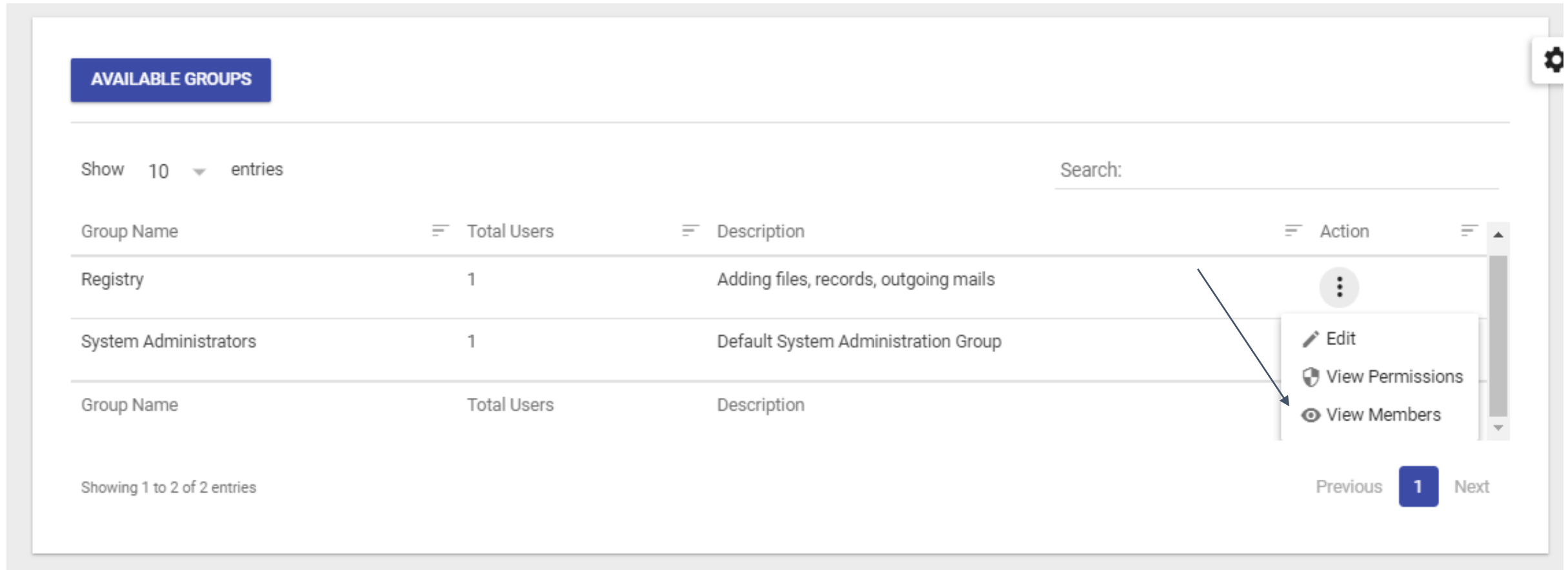
Group Name	Total Users	Description	Action
Registry	1	Adding files, records, outgoing mails	
System Administrators	1	Default System Administration Group	
Group Name	Total Users	Description	Action

Showing 1 to 2 of 2 entries

Previous 1 Next

Adding Users to groups

After adding a group, click on the actions. From the dropdown list select View members.



The screenshot displays a web interface titled "AVAILABLE GROUPS" in a blue button at the top left. Below the title, there is a "Show 10 entries" control and a "Search:" input field. A table lists two groups: "Registry" and "System Administrators". Each row includes columns for "Group Name", "Total Users", and "Description". An "Action" column is present for each row, with a dropdown menu open for the "Registry" group. The dropdown menu contains three options: "Edit", "View Permissions", and "View Members". An arrow points to the "View Members" option. At the bottom of the table, it says "Showing 1 to 2 of 2 entries". On the right side, there are "Previous", "1", and "Next" navigation links. A gear icon is visible in the top right corner.

Group Name	Total Users	Description	Action
Registry	1	Adding files, records, outgoing mails	<div>⋮<ul style="list-style-type: none">EditView PermissionsView Members</div>
System Administrators	1	Default System Administration Group	

Showing 1 to 2 of 2 entries

Previous 1 Next

Adding Users to groups

After clicking view members, a screen below loads click on the button at the bottom to add a user. After has been added, they can be removed using the deactivate button.

The screenshot displays the 'REGISTRY MEMBERS' interface. At the top left is a blue button labeled 'REGISTRY MEMBERS'. Below it, there's a 'Show 10 entries' dropdown and a search bar. The main content is a table with columns: Title/Position, User, Email Address, Date Joined, and Action. The first row shows 'Commissioner', 'Mr. Adam Joe', 'adam.joe@edocs.com', '24-Oct-2022', and a red 'DEACTIVATE' button. Below the table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there's a green circular button with a plus sign and a user icon. A blue arrow points from the search bar to the 'DEACTIVATE' button, and another blue arrow points from the bottom right of the table area to the green circular button.

Title/Position	User	Email Address	Date Joined	Action
Commissioner	Mr. Adam Joe	adam.joe@edocs.com	24-Oct-2022	DEACTIVATE

Showing 1 to 1 of 1 entries

Previous 1 Next

© 2010-2022 All Rights Reserved. eDocs v1.0.1

Thu Oct 25 2023 10:06:00 GMT+0000 (Etc/UTC)

Adding Users to groups

Select the users to add to a group by checking their checkbox and save by clicking add member

← ADD NEW REGISTRY MEMBERS

Show 10 ▾ entries

Search:

☐ Title/Position ▾ User

▾ Phone

▾ Email

▾

☐ Commissioner Vivian Birungi

256772516001

viviangal20@edocs.com

Title/Position User

Phone

Email

Showing 1 to 1 of 1 entries

Previous **1** Next

ADD MEMBERS

Adding Permissions to groups

After clicking view permissions, a screen below loads click on the edit button at the bottom it will activate each of the group of permission i.e. create, read, update and delete. Assign a permission by checking the corresponding checkbox.

The screenshot displays the 'REGISTRY PERMISSIONS' interface. At the top, there is a blue button labeled 'REGISTRY PERMISSIONS' and a gear icon in the top right corner. Below this, the 'CREATE' section is expanded, showing three checkboxes: 'Department File Prefixes', 'Classification Scheme (Keywords)', and 'Documents', all of which are checked. Below the 'CREATE' section are 'READ' and 'UPDATE' sections, each with a dropdown arrow. At the bottom right of the interface, there is a green circular button with a white pencil icon, which is the 'edit' button. An arrow points from the text above to this button. Another arrow points to the 'CREATE' section header.

Adding Heads of Directorates

Visit the menu, click on settings then Heads of Directorates, click on the action click edit. A modal opens then click to select a user.

The screenshot shows the EDOCSTRAINING application interface. On the left is a sidebar menu with options: Dashboard, My Tasks, My Files, Access Requests, Search, Reports, Delegate Tasks, Settings, Directorates, Heads of Directorates, Departments, Heads of Departments, Dept. File Prefixes, Users, Groups, Permissions, and Organisation Titles. A blue arrow points to 'Settings' in the menu. The main content area shows the breadcrumb 'Home > Settings > Heads of Directorates'. Below this is a table titled 'HEADS OF DIRECTORATES' with columns: Title, Head Of Directorate, Directorate, Departments, and Action. The table contains one entry: 'DHRM - Directorate of Human Resource Management' under the Directorate column, with '1' in the Departments column. A blue arrow points to the 'Edit Dir. Head' link in the Action column. To the right of the table is a modal titled 'EDIT: Directorate of Human Resource Management'. The modal has a close button (X) in the top right. It contains a text input field for 'Directorate Name' with the value 'DHRM - Directorate of Human Resource Management'. Below this is a dropdown menu labeled 'Select Head Of Directorate*' with a downward arrow. A green 'SAVE CHANGES' button is at the bottom right of the modal. A blue arrow points to the dropdown arrow.

EDOCSTRAINING

Home > Settings > Heads of Directorates

HEADS OF DIRECTORATES

Show 10 entries Search:

Title	Head Of Directorate	Directorate	Departments	Action
		DHRM - Directorate of Human Resource Management	1	⋮
Title	Head Of Directorate	Directorate	Departments	Edit Dir. Head

Showing 1 to 1 of 1 entries

Previous 1 Next

EDIT: Directorate of Human Resource Management

Directorate Name

DHRM - Directorate of Human Resource Management

Select Head Of Directorate*

SAVE CHANGES

Adding Heads of Departments

Visit the menu, click on settings then Heads of Department, click on the action click edit. A modal opens then click to select a user.



The screenshot displays the EDOCSTRAINING web application interface. On the left, a sidebar menu lists various system components, with 'Settings' expanded and 'Heads of Departments' selected. The main content area shows a table titled 'HEADS OF DEPARTMENTS' with columns for Title, Head Of Department, Department, and Action. A blue arrow points to the 'Edit Dept. Head' option in the Action column. To the right, a modal window titled 'EDIT: Human Resource Planning and Development' is open, showing the 'Department Name' as 'HRM - Human Resource Planning and Development' and a 'Select Head Of Department*' dropdown menu. A blue arrow points to the dropdown menu. A green 'SAVE CHANGES' button is located at the bottom right of the modal. The footer of the page includes copyright information and the current date and time.

EDOCSTRAINING

Home > Settings > Heads of Departments

HEADS OF DEPARTMENTS

Show 10 entries Search:

Title	Head Of Department	Department	Action
		HRM - Human Resource Planning and Development	
			 Edit Dept. Head

Showing 1 to 1 of 1 entries

Previous 1 Next

EDIT: Human Resource Planning and Development

Department Name

HRM - Human Resource Planning and Development

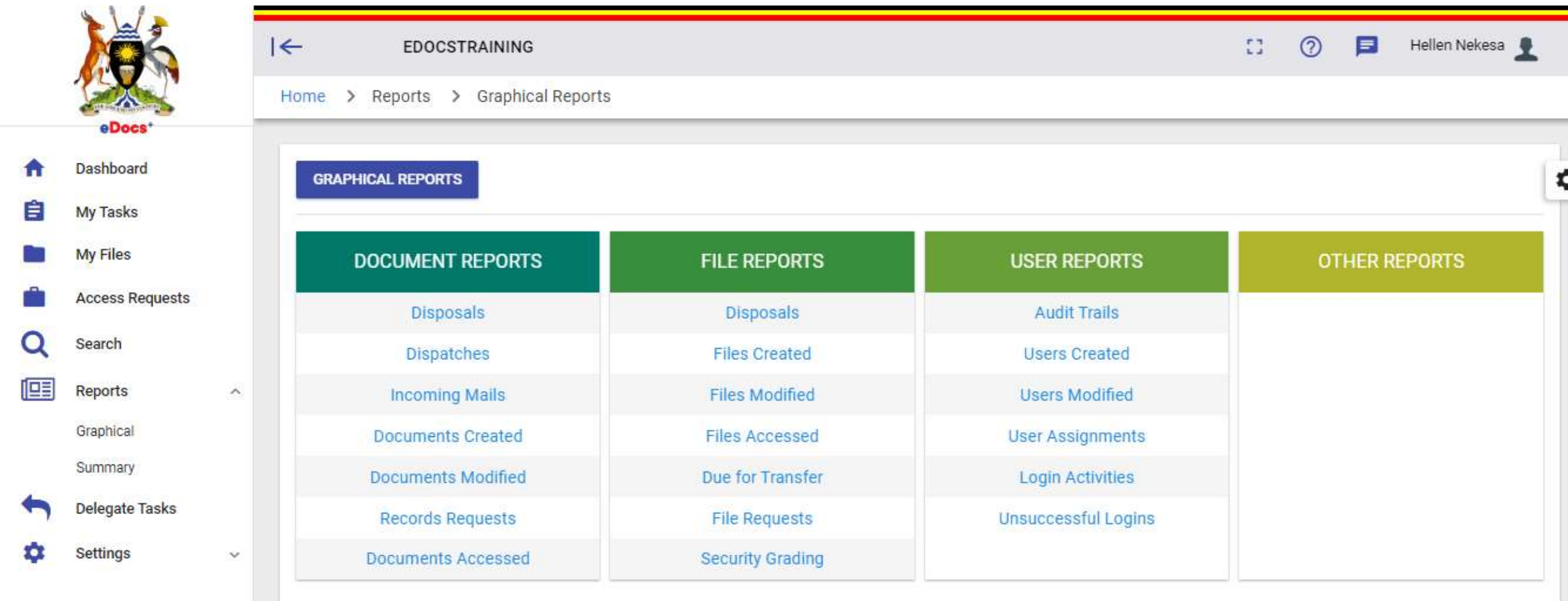
Select Head Of Department*

SAVE CHANGES

© 2019-2022 All Rights Reserved edocs+ v1.0.1 Mon Oct 24 2022 18:59:09 GMT+0300 (East Africa Time)

Viewing reports

- Click on graphical to view reports as either bar chart or line graph. To view a graph click on the report you need to view.



The screenshot displays the EDOCSTRAINING application interface. On the left is a sidebar with a logo at the top and a list of navigation items: Dashboard, My Tasks, My Files, Access Requests, Search, Reports (expanded), Graphical, Summary, Delegate Tasks, and Settings. The main content area has a header bar with a back arrow, the text 'EDOCSTRAINING', and user information 'Hellen Nekesa'. Below the header is a breadcrumb trail: Home > Reports > Graphical Reports. The main section is titled 'GRAPHICAL REPORTS' and contains four columns of report categories: Document Reports, File Reports, User Reports, and Other Reports. Each column lists specific report types that can be clicked to view graphical data.

DOCUMENT REPORTS	FILE REPORTS	USER REPORTS	OTHER REPORTS
Disposals	Disposals	Audit Trails	
Dispatches	Files Created	Users Created	
Incoming Mails	Files Modified	Users Modified	
Documents Created	Files Accessed	User Assignments	
Documents Modified	Due for Transfer	Login Activities	
Records Requests	File Requests	Unsuccessful Logins	
Documents Accessed	Security Grading		

Viewing reports in a tabular format

- Click on graphical to view reports as a summary . To view a specific table click on the report you need to view.



- Dashboard
- My Tasks
- My Files
- Access Requests
- Search
- Reports
 - Graphical
 - Summary
- Delegate Tasks
- Settings

EDOCSTRAINING Hellen Nekesa

[Home](#) > [Reports](#) > [Summary Reports](#)

SUMMARY REPORTS

DOCUMENT REPORTS	FILE REPORTS	USER REPORTS	OTHER REPORTS
Disposals	Disposals	Audit Trails	
Dispatches	Files Created	Users Created	
Incoming Mails	Files Modified	Users Modified	
Documents Created	Files Accessed	User Assignments	
Documents Modified	Due for Transfer	Login Activities	
Records Requests	File Requests	Unsuccessful Logins	
Documents Accessed	Security Grading		

Access requests

- To access a file or record that isn't available in the my files click on access

The screenshot displays the EDOCSTRAINING web application. The top header shows the user's name, Hellen Nekesa, and a profile icon. The sidebar on the left contains navigation links: Dashboard, My Tasks, My Files, Access Requests (highlighted with a blue arrow), Search, Reports, Delegate Tasks, and Settings. The main content area is titled 'My Requests' and shows a table with columns: Subject, Requested On, Expected Date, and Expiry Date. The table is currently empty, displaying 'No data available in table'. Below the table, there is a status section with flags: Pending, Approved, Denied, and Expired. A green circular button with a white plus sign is located at the bottom right, with a blue arrow pointing to it. The footer contains copyright information: © 2019-2022 All Rights Reserved edocs+ v1.0.1, and the date/time: Mon Oct 24 2022 19:09:38 GMT+0300 (East Africa Time).

Access requests

- To access a file or record that isn't available in the my files click on access

The screenshot displays the EDOCSTRAINING web application. The top header shows the user's name, Hellen Nekesa, and a profile icon. The sidebar on the left contains navigation links: Dashboard, My Tasks, My Files, Access Requests (highlighted with a blue arrow), Search, Reports, Delegate Tasks, and Settings. The main content area is titled 'My Requests' and shows a table with columns: Subject, Requested On, Expected Date, and Expiry Date. The table is currently empty, displaying 'No data available in table'. Below the table, there is a status filter section with options: Pending, Approved, Denied, and Expired. A green circular button with a white plus sign is located at the bottom right of the main content area, with a blue arrow pointing to it.

EDOCSTRAINING

Home > My Requests

My Requests

REQUEST FLAGS

- File
- Record

STATUS FLAGS

- Pending
- Approved
- Denied
- Expired

Showing 0 to 0 of 0 entries

Previous Next

© 2019-2022 All Rights Reserved edocs+ v1.0.1

Mon Oct 24 2022 19:09:38 GMT+0300 (East Africa Time)