

Digital Document Management System (DDMS)

USER MANUAL EXECUTIVE



Malaysian Administrative Modernisation and Management Planning Unit

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1 ABBREVIATIONS

No.	Abbreviation	Description
1.	PRJ	Pegawai Rekod Jabatan
2.	DDMS	Digital Document Management System
3.	SRS	System Requirement Specification
4.	SDS	System Design Specification
5.	NRIC	National Registration Identity Card
6.	JPR	Jadual Pelupusan Rekod
7.	MAMPU	Malaysian Administrative Modernisation and Management Planning Unit
8.	ANM	Arkib Negara Malaysia
9.	PEMANDU	Performance Management and Delivery Unit
10.	SA	System Administrator
11.	RM	Record Manager
12.	EU	End User
13.	IW	Information Worker
14.	AP	Application Team

Table 1: Abbreviations

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2 INTRODUCTION OF DDMS

As an initiative towards a Paperless Government, Digital Document Management System (DDMS) is the key project listed under Entry Point Projects (EPP8 - eGovernment). The project is positioned under the Communications, Content and Infrastructure (CCI), one of the 12 National Key Economic Areas (NKEA) which have been identified by the Malaysian Government for Economic Transformation Programme (ETP).

DDMS is a cloud-based system that is designed to manage the creation and maintenance of electronically created documents of the Malaysian public sector agencies within a specific classification scheme, apply retention and disposal schedules, and control access and use.

The fundamental objectives of the DDMS project are as follows:

- Replace paper records with digital records;
- Progressively eliminate the use of paper;
- Enable digital and non-digital documents to be created, captured, stored, maintained and used electronically; and
- Enable all government matters such as presentation material delivery, internal circulars and letters between agencies / departments to be made electronically.

In order to ensure compliance to national standards, DDMS was engineered to conform to the following standards endorsed by Arkib Negara Malaysia (ANM):

- MS ISO 16175: Information and Documentation Principles and Functional Requirements for Electronic Records in the Office Environment;
- MS 2223-1:2009: Information and Documentation Records Management. Part 1: General (ISO 15589-1:2001, IDT); and
- MS ISO 2223-2:2009: Information and Documentation Records Management Part 2: Guidelines (ISO / TR 15489-2:2001, IDT).

DDMS provides the technological component of a **framework for the systematic and structured management of records**. It links electronic and non-electronic records to activities, retains records of past actions, and fixes the content and structure of records over time. This will ensure that the electronic records generated can be preserved while maintaining their authenticity, reliability, integrity, usability, and accessibility at any time.

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DDMS provides the following management capabilities:

- Efficiency, by making information readily available when needed for decision-making and operational activities;
- Better use of financial resources, by allowing timely disposal of noncurrent records;
- Accountability, by enabling the creation of a complete and authoritative record of official activities;
- Compliance, by demonstrating that legal requirements have been met; and
- Risk Mitigation, by managing the risks associated with illegal loss or destruction of records, and from inappropriate or unauthorized access to records.

DDMS simplifies the records management of a traditional paper-based record filings system. The system includes an advanced file classification system that is designed based on ANM specifications. This feature incorporates the file retention schedules that are associated to each defined classification.

2.1 Implementation

DDMS is made available to public sector agencies through Software as a Service (SaaS) delivery model and is centrally hosted on a secured cloud infrastructure. Leveraging on a multi-tenancy architecture, the delivery model enables tremendous cost savings for each of the agencies. There is virtually no cost required for the infrastructure.

Other benefits include the following:

- Increase accessibility, promptness and transparency of Government service delivery;
- Create systematic control of document and record management of the public sector;
- Ensure the conservation of Malaysian institutional memory;
- Reduce the use of paper; and
- Support the Malaysian Government Green ICT initiative.

2.2 Using the System

DDMS will **only be accessible through the 1GovNet network** and will not be available through the internet. To gain access to the system, a user must be registered by the system administrator. Registration process will be done offline and will link users to their specific Tenancy (Agency). Each user will be assigned with a specific profile (User Access Level) e.g. Record Manager, Information Worker, End User, etc. Accessibility of the system modules, functions and data will be limited to the user profile access level.

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Minimum System Requirements:

The PC/Notebook specification should have at least the following specification.

- Network: 1GovNet network access;
- Processor: 1 Gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor;
- Memory Capacity: 2GB RAM;
- Operating System: Microsoft Windows XP or higher;
- Web Browser: Google Chrome (best view), Internet Explorer or Mozilla Firefox (with updated flash version); and
- Office Automation Software Integration: Microsoft Office (Word, Excel, PowerPoint, Outlook). The native client will be provided in the form of Add-Ins that will be installed onto Microsoft Office for Windows (version 2003, 2007 and 2010).
- Email Client: Microsoft Outlook (Component of Microsoft Office 2003, 2007, 2010)

Details on how to operate the DDMS system will be discussed in the following section.

2.3 DDMS Call Center

DDMS is supported by a dedicated call center consisting of trained personnel. The call center will be operating 24x7 to provide assistance with troubleshooting and technical support.

For technical support, please contact the DDMS Call Centre at +603-5650-5020. The call center can also be reached through email at dgkcc@dgkom.com.my.

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3 DDMS ACCESS MATRIX

No	Module – Sub module	SA	RM	EU	IW	AT
1	Setting and Download					
1.1	User Preferences	√	√	√	√	✓
1.2	Change Password	✓	✓	✓	√	✓
1.3	View Details	√	✓	√	√	√
1.4	Download	√	√	√	√	✓
2	Setup & Configuration					
2.1	Classification	-	✓	-	-	√
2.2	Record Type	-	-	-	-	√
2.3	Retention	-	✓	-	-	✓
2.4	Batch Upload	-	-	-	-	✓
3	Create	✓	✓	✓	✓	-
4	Maintain					
4.1	Disposition Job	-	✓	-	-	✓
4.2	Hold	-	✓	-	-	-
4.3	Notification	-	-	-	-	✓
5	Disseminate					
5.1	Browse by Classification	✓	✓	✓	✓	✓
5.2	Principal	-	✓	✓	✓	✓
5.3	Advance Search	✓	√	✓	✓	✓
5.4	Saved Search	✓	✓	✓	✓	✓
5.5	Favourites	✓	✓	✓	✓	✓
5.6	Recent Record	✓	✓	✓	✓	✓
6	Administer					
6.1	User Defined Field	-	-	-	-	✓
6.2	Principal	√	-	-	-	-
6.3	User Profile	-	-	-	-	✓
6.4	Security Level	✓	-	-	-	✓
6.5	Login & Security Policy	-	-	-	-	√
6.6	Session Tracking	✓	-	-	-	-
6.7	Report	✓	-	-	-	-

Table 2: Access Matrix

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4 DDMS USER GUIDE

4.1 User Login

There are three scenarios for User Login.

- a. User login;
- b. Forgot Password; and
- c. Change Password as Precaution.

4.1.1 Main Login Process

a. Main User Login Flow Chart

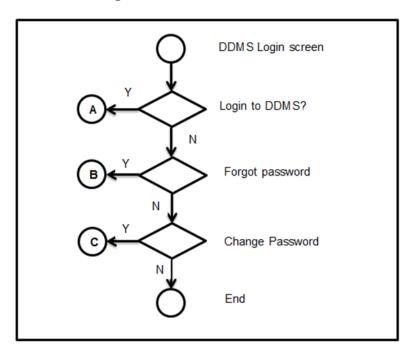


Figure 4.1: Main User Login flow chart

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4.1.2 User Login

Scenario:

User login into the system using a valid username and password. If the user login for the first time, the system will request user to change the password immediately after successful login.

a. User Login Flowchart

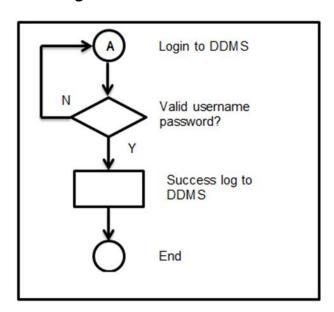


Figure 4.2: Using valid Username and password flow chart

b. Using Valid Username and Password Procedure

1. Open the browser and key in URL "ddms.mampu.gov.my" at the internet browser.



2. Enter your Username and password.

Format for username: NRIC@Agency and click on [Login] button.

Example:

800617065281@mampu 800617065281@pemandu

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3. If user key in the wrong user name and/or password, the following screen will be displayed:



Notes: Account will be locked if the user tries to login the system for three times and failed. User needs to contact administrator to unlock the account.

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4. If the user login for the first time, the following window will be displayed to force change a new password.



5. Enter your **New Password** and **Retype Password** in respective field.

Note: The password must be at least 12 characters long with a combination of alphabets, numbers and special characters (i.e. non-alphanumeric characters, example @,#,%,\$).



Click on [Change Password] to proceed to change password. [Logout] to exit to the login page.

6. After click on **Change Password**, it will prompt Password change successfully. Click **[OK]** button.



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7. The following menu will be displayed on your screen.



8. If the system is left idle for 20 minutes, user is given 30 seconds to react. The following alert message will be displayed.



- i. Click [OK] button to continue the session; or
- ii. Click [Cancel] button to logout.
- 9. If there is no response in 30 seconds from the user, the following alert message will be displayed.



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4.1.3 Forgot Password

Scenario:

User forgot his/her password and requests the system to reset the password. This option allows user to retrieve their password via email.

a. Forgot Password Flow Chart

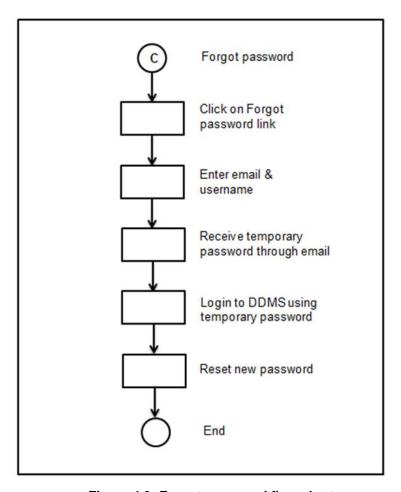


Figure 4.3: Forgot password flow chart

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b. Forgot Password Procedure

1. Open the browser and key in **URL** "*ddms.mampu.gov.my*" at the internet browser.



2. From the login page click the **[Forgot Password?]** link.



3. The following pop-up window will be displayed on your screen:



4. Enter your username and email address. The following screen will be displayed on your screen:

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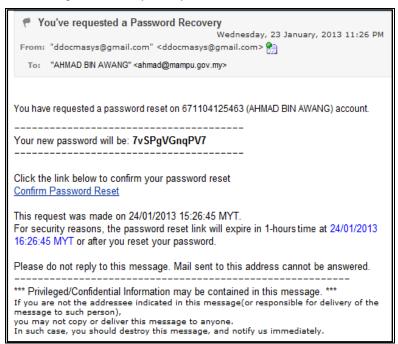


Click on the [Request Password Recovery] button.

The system will verify the **Username** and **Email Address** entered against the database, if successful the notification message will be prompted. The following window will be displayed:



- 6. Go to your mailbox.
- 7. Open the email that bears the subject "You've requested a Password Recovery" and the content of this email is as follows. New Password will be sent through the mail by the system:



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8. Click on the [Confirm Password Reset] hyperlink and the password will reset automatically. The screen below will be displayed:



Clik [Ok] button to proceed login page.

 In case the Username or Email is invalid, the following error message will be displayed.



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4.1.4 Change Password as Precaution

Scenario:

When the user feels that his/her password is no more secure and decided to change the password by clicking the Change Password button. The system will prompt the user to enter his current password and a new password. The system will prompt the user to enter this new password the next time they attempt to login into the system again.

a. Change Password as Precaution Flow Chart

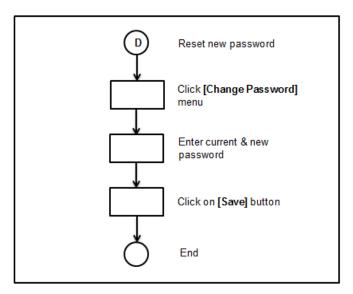
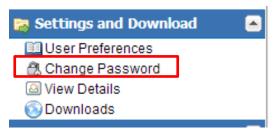


Figure 4.4: Change password as precaution flow chart

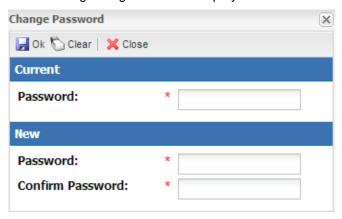
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b. Change Password as Precaution Procedure

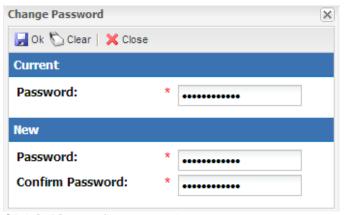
 Under [Settings and Download] section, click on [Change Password] menu.



The following dialog box will be displayed:



2. Enter Current Password, New Password and Confirm Password.



Click [Ok] to confirm your action.

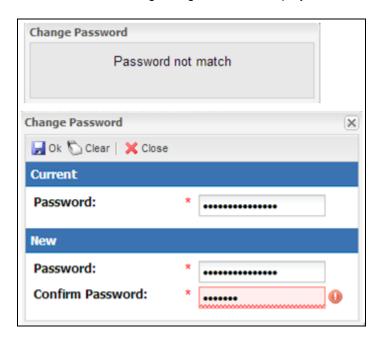
Click [Close] to cancel password change.

If click on [OK] button, this message will be displayed.

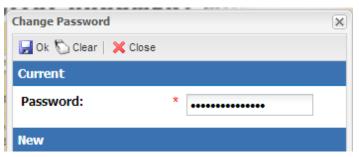


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 If new [Password] and [Confirm Password] does not matched, mouse over to the , the following dialog box will be displayed.



4. Re-enter the matched password, click **[OK]** button to confirm your action.



Notes: User can re-use their old password on the 6th attempt of changing the password on 5 cycle password basis.

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4.2 Settings

There are three scenarios for Settings.

- a. Customized User Preferences;
- b. View Details; and
- c. Add-In Downloads and Settings.

4.2.1 Customized User Preferences

Scenario:

User wants to customize his/her preferences such as default language, default columns to be displayed in record view or record browses.

c. Customized User Preferences Flow Chart

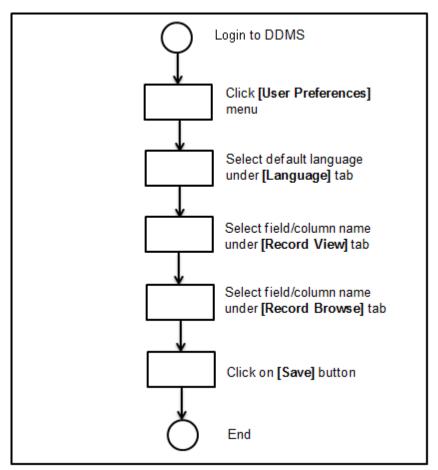


Figure 4.5: Customized user preferences flow chart

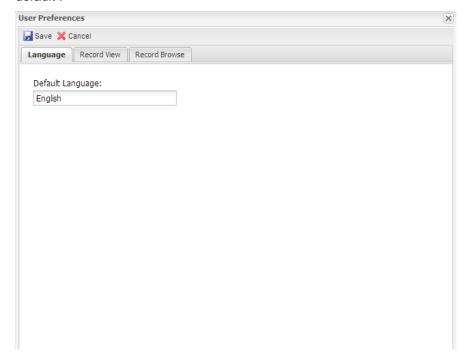
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d. Customized User Preferences Procedure

 Under [Settings and Download] section, user has to click on [User Preferences] menu.



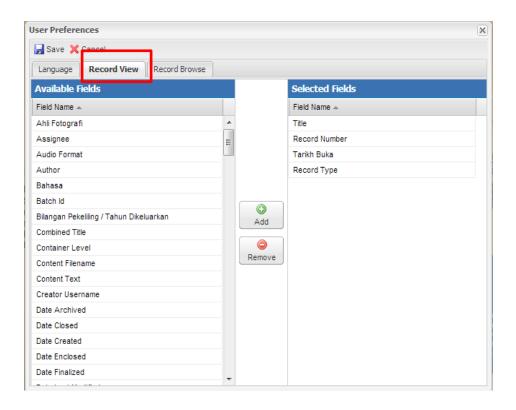
The following pop-up window will be displayed with **[Language]** tab as default:



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Record View

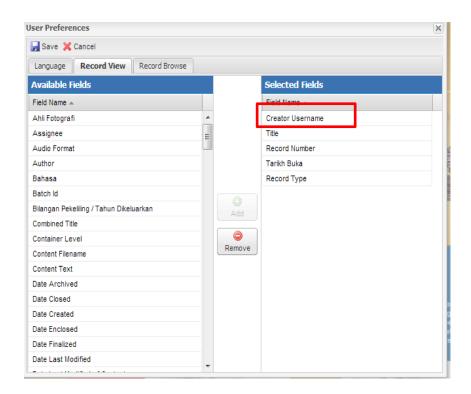
1. Click on the [Record View] tab to set the record view value. Title, Record Number, Tarikh Buka and Record Type will be the defaults field in record browse window. User can see these changes when searching. The default fields display in record list is as follows:



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- 2. To add a field in the record view setting.
 - i. Choose the required field in the [Available Fields] column. In this case,'Creator Name' is used as an example.
 - ii. Click [Add] button. The required field will be added to the top of the Selected Fields list (on the right).

The **Creator Username** field added in the selected field column as displayed:



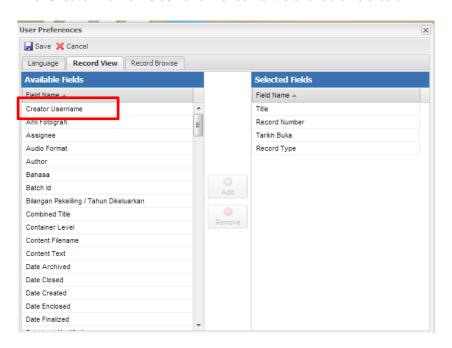
iii. Click **[Save]** button to save the changes. The following message window will be displayed:



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- 3. To remove fields from the record view setting.
 - i. Choose the unwanted field in the [Selected Fields] column.
 - ii. Click [Remove] button. The selected fields will be removed from the [Selected Fields] list.

The 'Creator Name' fields have moved to the available field column:



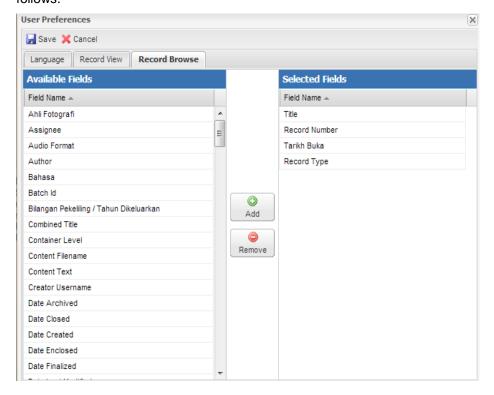
iii. Click **[Save]** button to save the changes. The following message window will be displayed.



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Record Browse

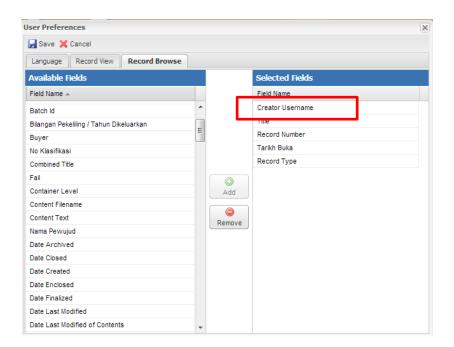
1. Click on the [Record Browse] tab to set the record browse value. Title, Record Number, Tarikh Buka and Record Type will be the default field in record browse window. User can see these changes when browsing attachments to attach in Lampiran while in creating records such as Memo, Surat Menyurat and Emel. The default fields displayed for record browse is as follows:



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- 2. To add fields in the record browse setting.
 - i. Choose the required field in the [Available Fields] column.
 - ii. Click [Add] button, the required field will be added to the top of the Selected Fields list (on the right).

Example: User chooses 'Creator Username' field to be added in the Selected Fields column. The 'Creator username' fields added in the selected field column as displayed:

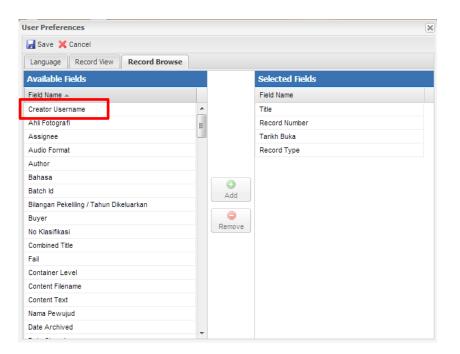


iii. Click [Save] button to save the changes. The following message window will be displayed:



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- 3. To remove field in the record list setting.
 - i. Choose the field to be removed from the [Selected Fields] column.
 - ii. Click [Remove] button. The selected fields will be removed from the Selected Fields list. In this case, the Creator Username field has been removed from the Selected Fields. The 'Creator Username' field was moved to Available Fields column as displayed:



iii. Click **[Save]** button to save the changes. The following message window will be displayed:



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4.2.2 View Details

Scenario:

The View Details button will actually prompt the properties of the current user logged in. From there, the user will be able to see his/her profile details stored in the system.

a. View Details Flow Chart

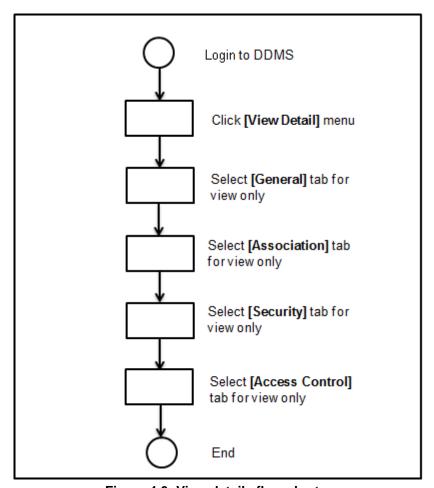
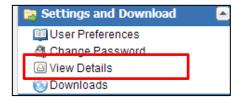


Figure 4.6: View details flow chart

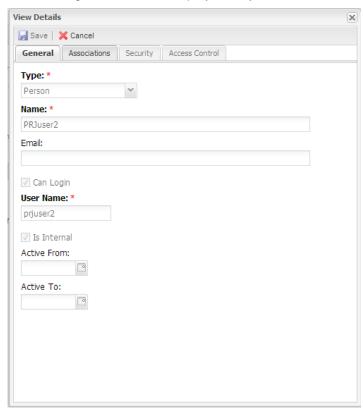
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b. View Details Procedure

1. At [Settings and Download] section, click on [View Details] menu.



The following screen will be displayed on your screen.



2. Click at [Associations] tab. The following screen will be displayed.



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4.2.3 Add-In Downloads and Settings

Scenario:

When the user want to capture MS Outlook email and MS Office document into the system but his/her workstation does not have the Add-In installed, they need to download the Add-In from the system and install it to their workstation.

a. Add-In Downloads and Settings Flow Chart

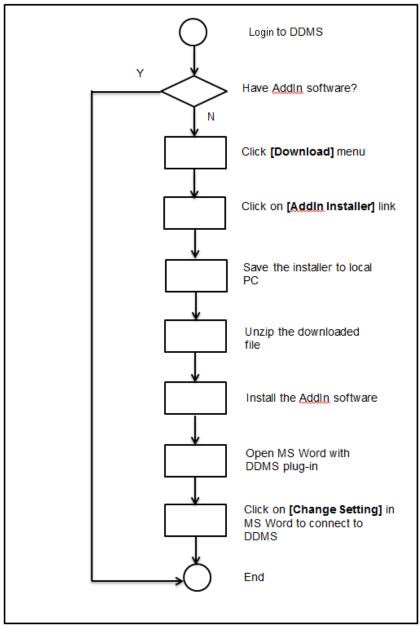


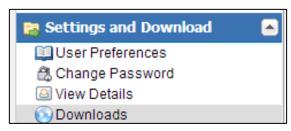
Figure 4.7: Add-In download and Settings flow chart

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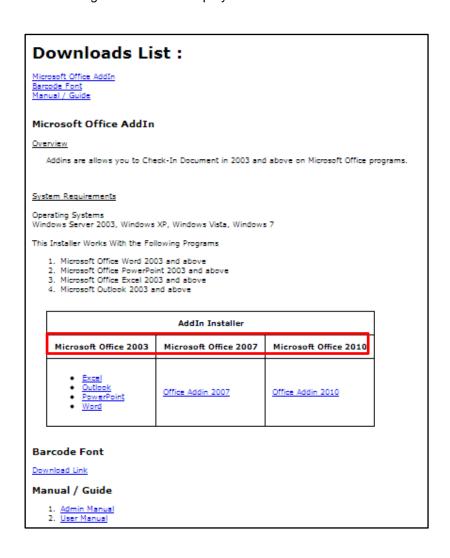
b. Add-In Downloads and Settings Procedure

Downloads Add-In application.

1. At [Settings and Download] section, choose [Downloads] menu.



The following screen will be displayed.

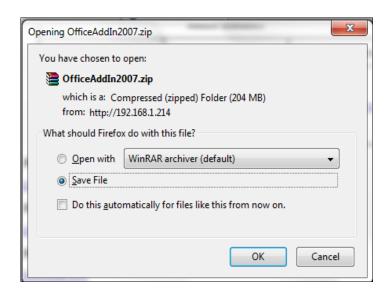


- Click on [Add-In Installer] link to download the relevant Office Add-In. It depends on the Microsoft Office version installed in the PC or notebook.
 - For Microsoft Office 2003, click Excel, Outlook, PowerPoint and Word to download Office 2003 Add-In.

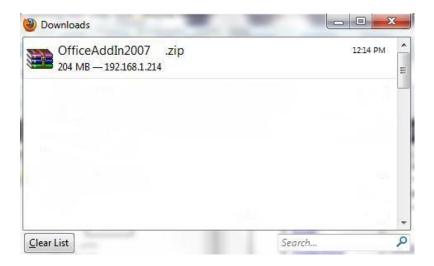
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- ii. For Microsoft Office 2007, click Office Addin 2007 to download Office 2007 Add-In.
- For Microsoft Office 2010, click Office Addin 2010 to download Office2010 Add in.

This example shown for Microsoft Word 2007. The following screen will be displayed:

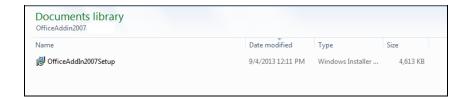


Click on the [OK] button to start the download process. Download window will be displayed:



4. Once downloaded, the user needs to extracts the ZIP file in the local desktop or notebook computer into specific folder. The following screen will be displayed:

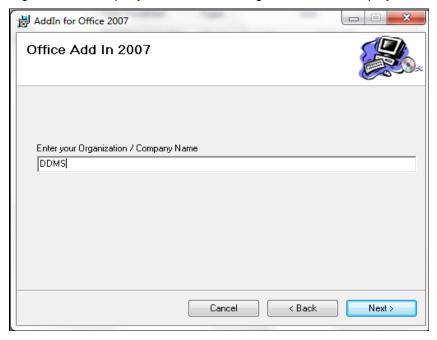
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From the extracted zip folder, click setup icon. The following screen will be displayed:



6. Click [Next] button to complete the installation process and insert the organization /company name. The following screen will be displayed:



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- 7. Enter "DDMS" at the [Enter your Organization / Company Name] field.
- 8. Then click Next > button and the following dialog box displayed :



9. Click Next > button and the following dialog box displayed.

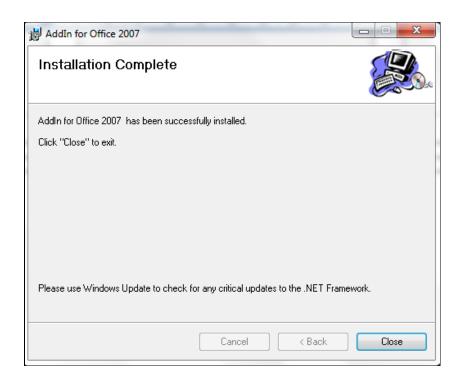


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10. Click Next > button and the following dialog box displayed the installation in progress.

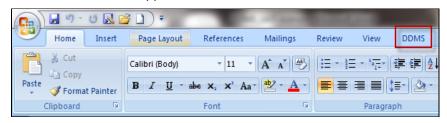


- 11. Wait until the installation is completed.
- 12. Click **[Close]** button: to close the screen. The following screen will be displayed on your screen:



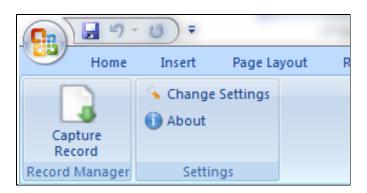
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13. To configure Microsoft Office Word, open the Microsoft Office word, there should have "DDMS" appear in the Menu bar.

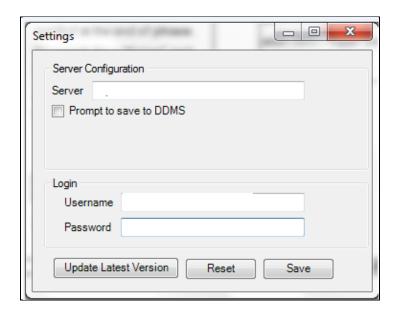


14. Click the Menu and the following items display.

The following screen will be displayed:



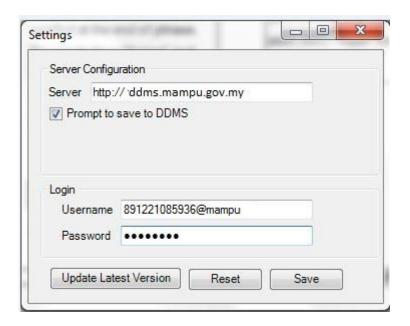
15. Click the **[Change Settings]** button to display the following dialog box. The following screen will be displayed:



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- Enter the IP address of the server in the Server field. Example "http://ddms.mampu.gov.my"
 - Enter the Username and Password that is used to access the system.

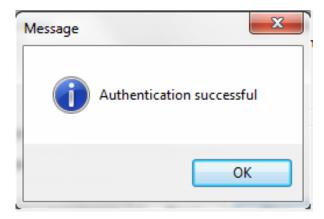
The following screen will be displayed:



[Save] button to save the configuration settings [Reset] button to clear all the settings.

Notes: User needs to update their password in Microsoft Office AddIn setting same as password in DDMS.

ii. If click [Save] the following message window will be displayed.



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4.3 Creating and Capturing Documents

There are six scenarios for Creating and Capturing Documents:

- a. Capture Digital Document;
- b. Capture Physical Document;
- c. Capture MS Outlook Email;
- d. Capture MS Office Document;
- e. Capture Digital Document (Audio and Video); and
- f. Routing Record through Email.

4.3.1 Create Flow Chart

a. Main Create Flow Chart

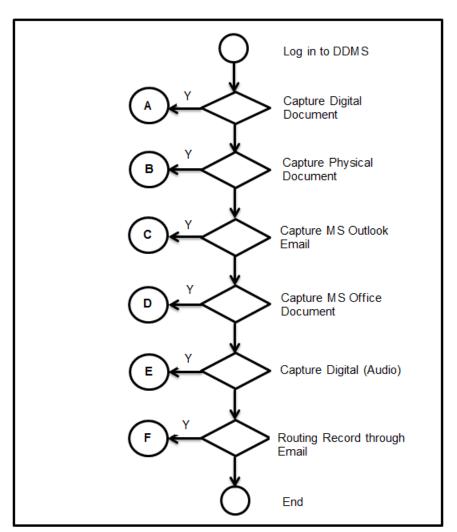


Figure 4.8: Create flow chart

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4.3.2 Capture Digital Document

Scenario:

When user having a digital document in softcopy such as memo and need to be captured and upload into the system, they can upload using these features. For example documents in Ms Office Word, audio, notepad and pdf.

a. Capture Digital Document Flow Chart

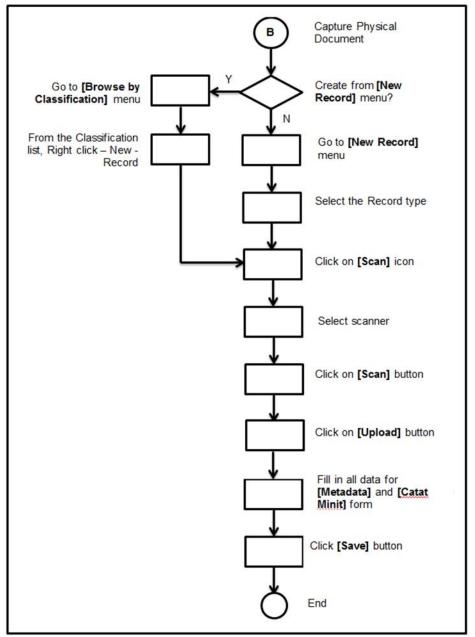


Figure 4.9: Capture Digital Document flow chart

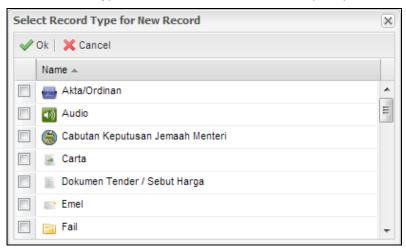
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b. Capture Digital Document Procedure

1. Go to the [Create] menu and click [New Record].



Select Record Type for New Record window will be prompted.



2. Select the Record Type by clicking on the checkbox.



3. Click [Ok] button. Click [Cancel] button to cancel the action.

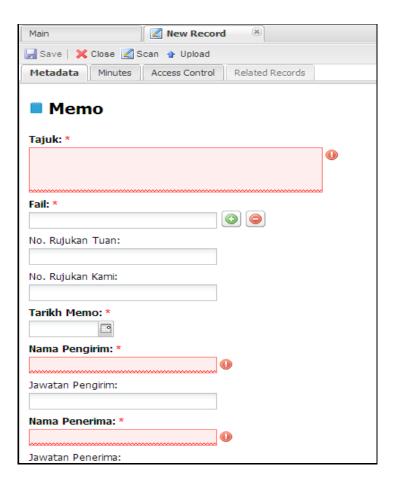


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4. Data Entry Form will appear on a new tab.

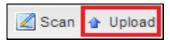
There are four tabs in this screen and each has its own function.

- i. Metadata tabs contains information that describe about data.
- ii. Minutes tabs contains instruction about the records. For example "Sila ambil tindakan".
- iii. Access control tabs contains information about the records security level and principals. The security level of the records either "Terbuka" or "Terhad" and etc. While principals contain information on who can access the records. At the bottom of the screen there are two checkbox which are File Based Security and Bypass Reference Access Control Level. File Based security will follow the record's file security level while Bypass Reference Access Control Level will not follow any of it.
- iv. Related Records tab shows any records that related to it. However, the tab is disable and only Record Manager/Pegawai Rekod Jabatan (PRJ) can relate a record to a record, file to a record or file to a file.



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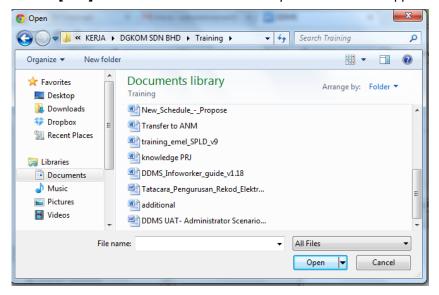
5. Click [Upload] button to upload the document(s).



6. Upload dialog window will appear.

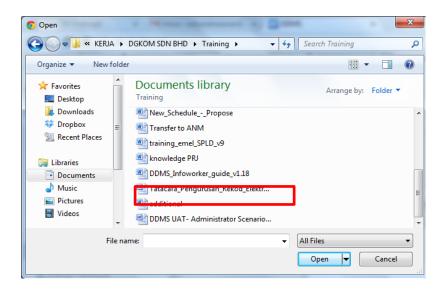


- i. [Add] button to add document to upload;
- ii. [Remove] button to remove the upload document(s);
- iii. [Reset] button to refresh the screen;
- iv. [Upload] button to upload the document to the system; and
- v. [Close] button to close the *Upload dialog* screen.
- 7. Click on [Add] button. Choose Document to Upload window will appear.



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8. Select the document that the user wants to upload.



 Click [Open] button OR the user can just double-click on the selected document. Click [Cancel] button to cancel.

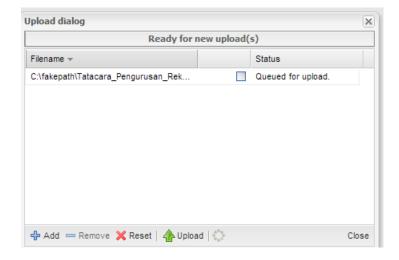


The selected document(s) to be uploaded will be listed on the [Upload dialog] screen.

There are two columns on the screen:

- i. **Filename** Name of the document that ready to upload.
- ii. Status Status of the document list.

[Queued for upload] status will appear on Status column.

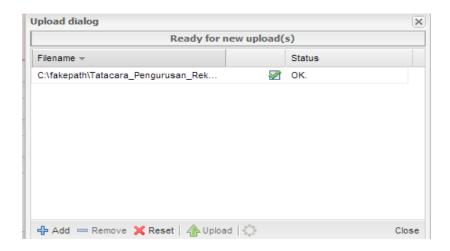


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11. Click [Upload] button.

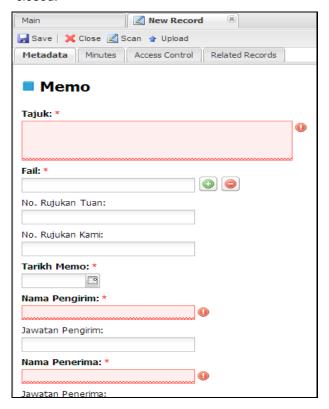


The user will see the status column change to 'OK'.



Click the [Close] button to close the window.

12 The **Data Entry Form** will appear again after previous window has been closed.

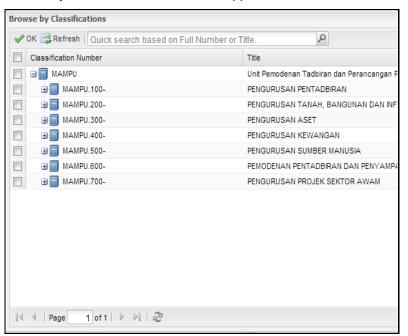


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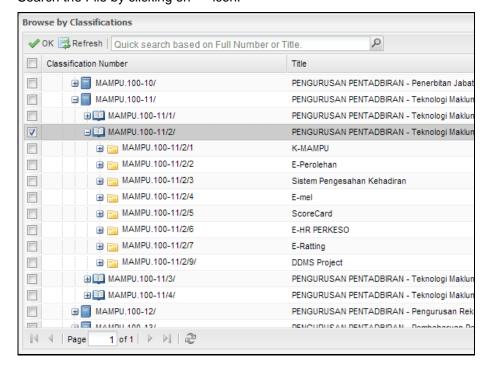
- 12. Fill in all the fields.
- 13. On *Fail* field, click button.



Browse by Classifications screen will appear.

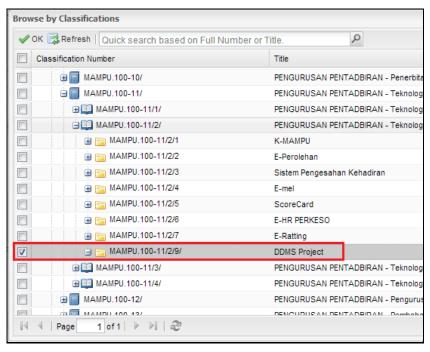


14. Search the File by clicking on it icon.



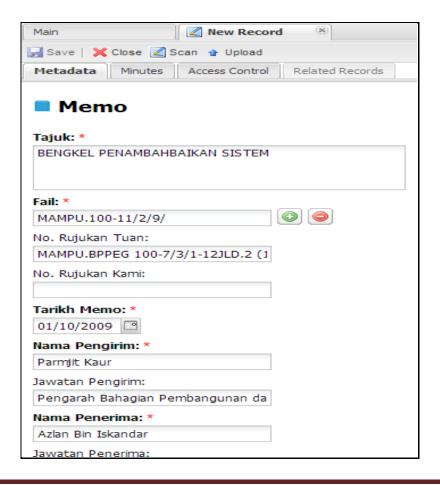
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15. Select the File by tick on checkbox.



Click [OK] button to confirm the action.

16. No. Rujukan Kami field will be generated automatically field upon saving.



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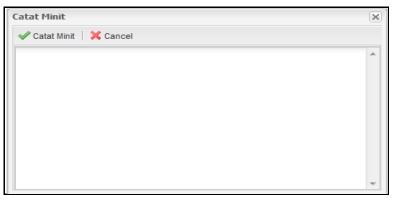
17. Click the [Minutes] tab.



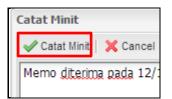
18. Click button to fill in **Minit** field. button to clear **Minit** field.



19. Catat Minit screen will appear.



20. Fill in *Catat Minit* field and click **[Catat Minit]** button. Click **[Cancel]** button to cancel the action.



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After click on [Catat Minit] button, window will be displayed:



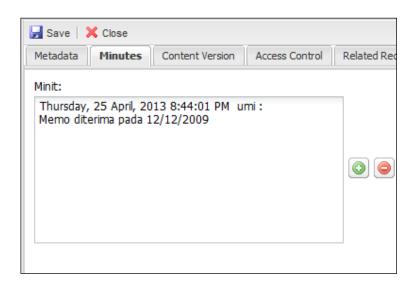
21. Click [Save] button to save the record.



Note: Only Record Manager can modify metadata after the record was saved.

22. To view the minit:

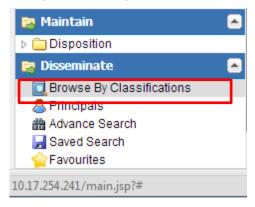
- i. Reselect the respective record.
- ii. Click on [Minit] tab to display the result and the following screen will be displayed:



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Alternative way to create record is using [Browse By Classifications] menu.

1. Go to [Disseminate] section and click the [Browse By Classification] menu.



The following window will be displayed.

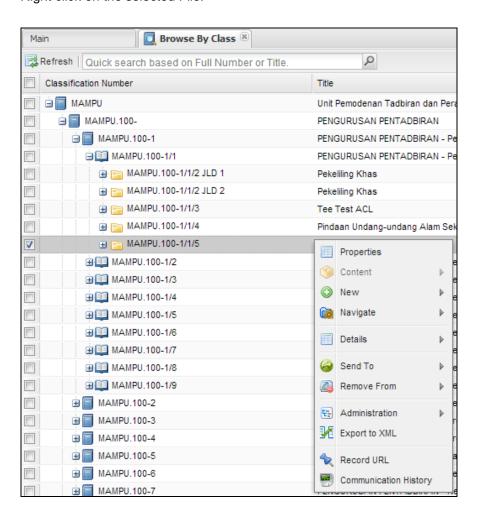


2. Browse the classification by clicking the sign to expand until File level ().

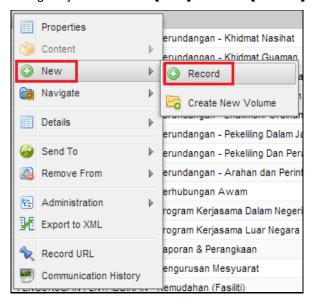


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3. Right click on the selected File.

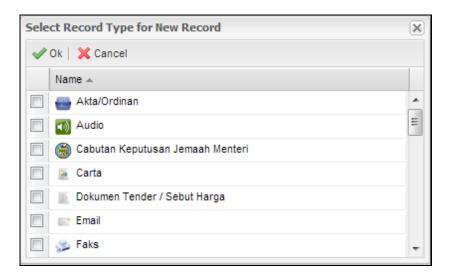


4. Navigate your mouse to [New] and click [Record].



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Select Record Type for New Record screen will appear.



5. Continue the operation starting from step 3 in **Capture Digital Document** section.

Alternative way to create record is using [Favourites] menu.

1. Go to [Disseminate] section and click the [Favourites] menu.



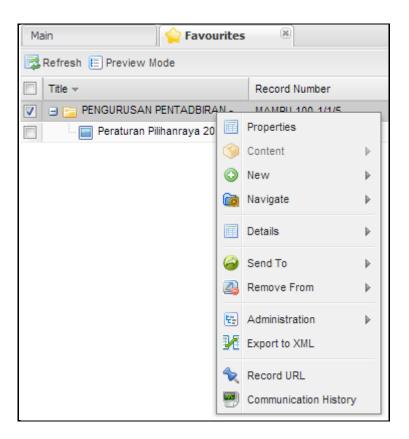
Favourites screen will appear on a new tab.



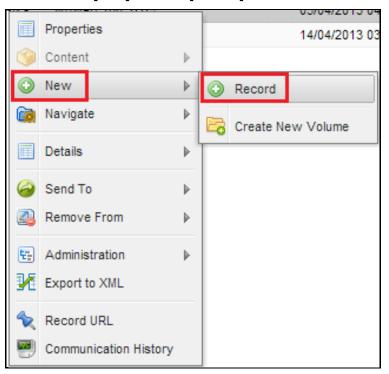
Notes: User need to make sure at least there is a record in the favourites tray. If not, user can refer to **Maintain Favourites Tray List** to add record(s).

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2. Right click on the selected File. The following screen will be displayed:

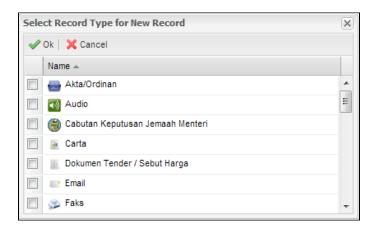


3. Mouse over to [New] and click [Record].



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Select Record Type for New Record screen will appear.



Continue the operation starting from step 3 in **Capture Digital Document** section.

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4.3.3 Capture MS Outlook Email

Scenario:

User received an email message through Microsoft Outlook and they want to capture it into the system.

a. Capture MS Outlook Email Flow Chart

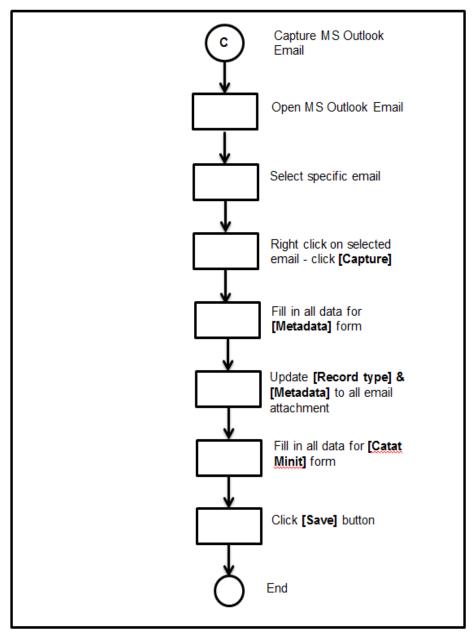


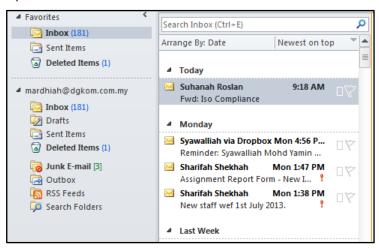
Figure 4.10: Capture MS Outlook Email flow chart

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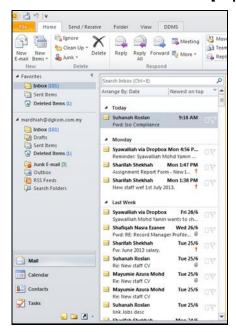
b. Capture MS Outlook Email Procedure

Capture MS Outlook Email

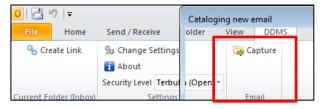
Open the Microsoft Outlook.



2. Click the selected email and click [Capture].

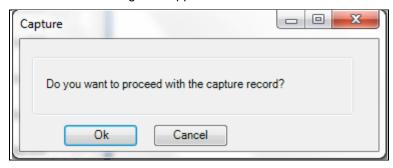


3. Click on [Capture] menu.



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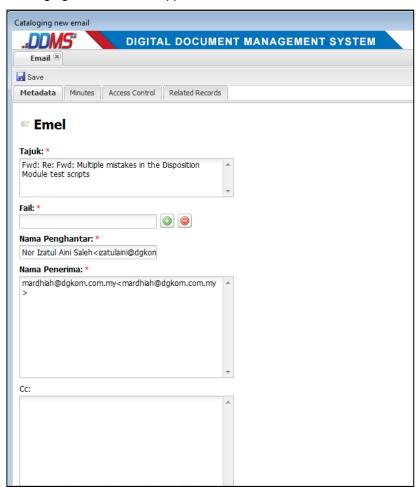
Confirmation message will appear.



4. Click [Ok] button to proceed or [Cancel] button to cancel.



Cataloging new email will appear.



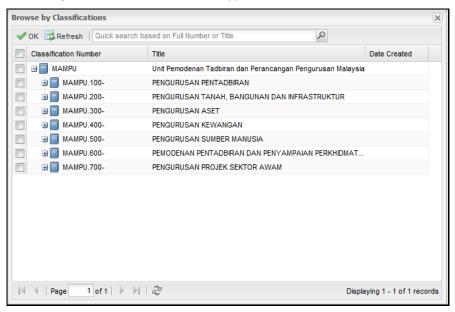
Notes: *Tajuk*, *Nama Penghantar* and *Nama Penerima* field will automatically filled in. User do not need to fill up those field.

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5. Click button on **Fail** field or button to clear **Fail** field.

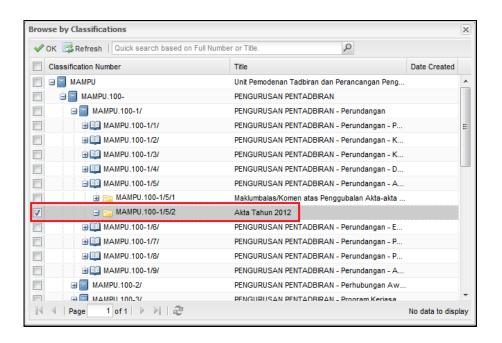


Browse by Classification screen will appear.



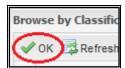
Note: All other metadata are automatically filled in by the system.

6. Browse the Classification to search the File by clicking the 🗓 button.



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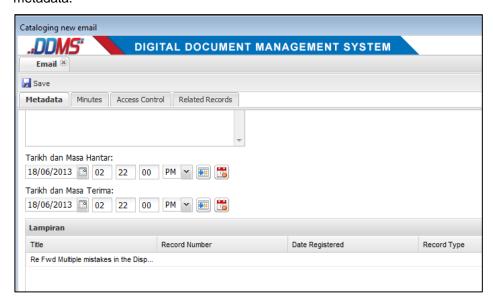
7. Click [OK] button to confirm or [Refresh] button to refresh the screen.



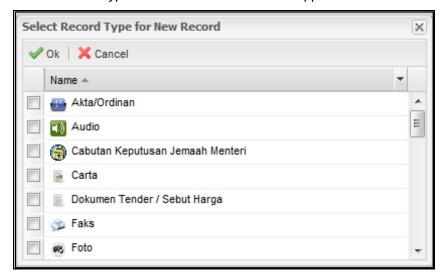
The selected File will be filled on the Fail field.



8. On the *Lampiran* field, select the attachment and click to update metadata.



Select Record Type for New Record screen will appear.

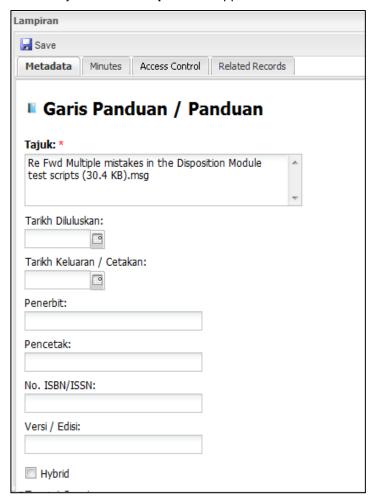


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9. Select the Record Type and click **[Ok]** button.



Data Entry Form for Lampiran will appear.

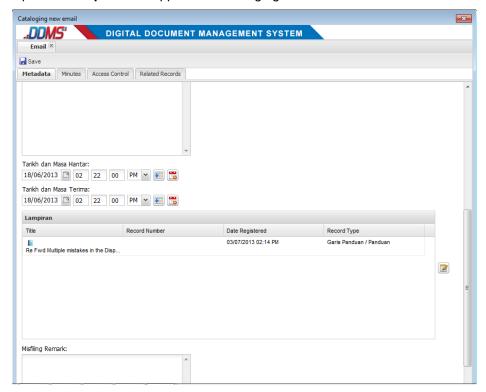


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10. Fill all the metadata and click [Save] button.

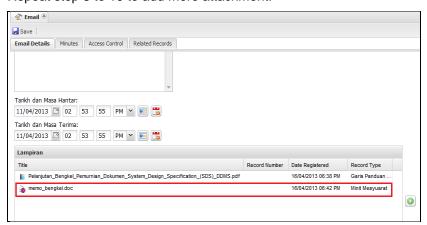


Updated Lampiran will appear on Cataloging new email screen.



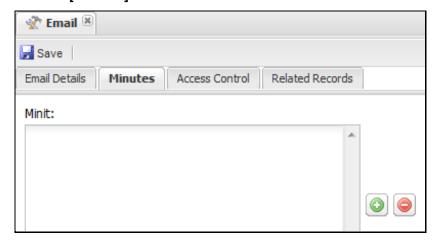
Date Registered and Lampiran Type column has been filled automatically.

11. Repeat step 8 to 10 to add more attachment.

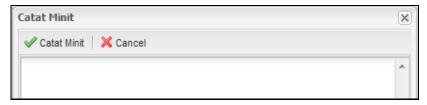


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12. Click the [Minutes] tab.



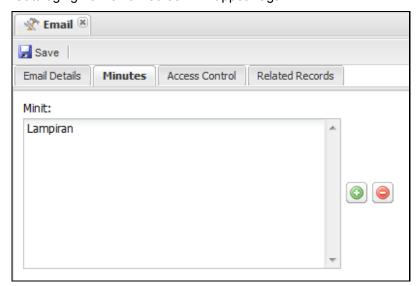
13. Click button to fill in **Minit** field. Catat Minit screen will appear.



14. Fill in *Catat Minit* field and click **[Catat Minit]** button. **[Cancel]** button to cancel the action.



'Cataloging new email' screen will appear again.

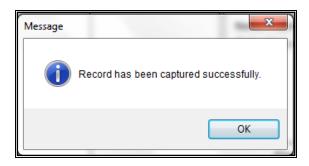


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15. User need to click [Save] button to confirm.



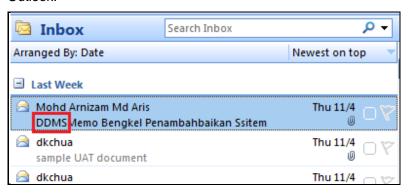
The following message will appear.



16. Click **[OK]** button to proceed.



Successfully captured email will be prefixed with "[DDMS]" text in Microsoft Outlook.



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4.3.4 Capture MS Office Document

Scenario:

When user want to capture the MS Office document(s) such as Word, Excel or PowerPoint into the system from within their native MS Office application.

a. Capture MS Office Document Flow Chart

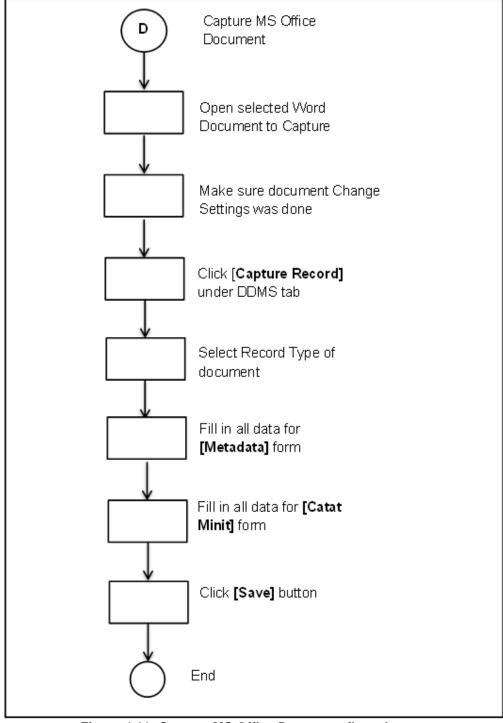


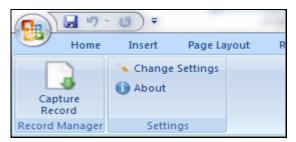
Figure 4.11: Capture MS Office Document flow chart

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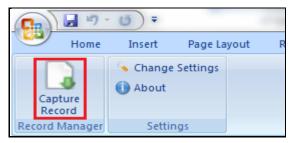
b. Capture MS Office Document Procedure

Open Microsoft Office Document application and click [DDMS] menu tab.
 This exercise using Microsoft Word 2007. In addition, these steps also can be applied for Microsoft Excel and Power Point.

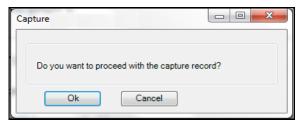
Note: If user had been changed their DDMS password, user need to change the settings. User can refer to steps in Add-In Downloads and Settings module to do so.



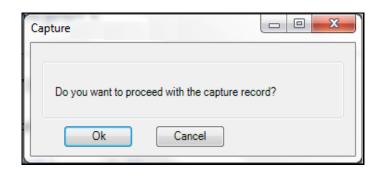
2. Click the [Capture Record] button.



Confirmation screen will appear.

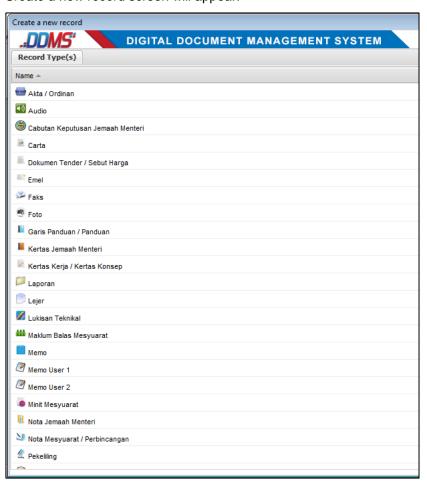


3. Click [Ok] button to proceed or click [Cancel] button to cancel.



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Create a new record screen will appear.



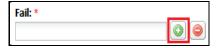
4. Double click the selected Record Type. Data Entry Form will appear.



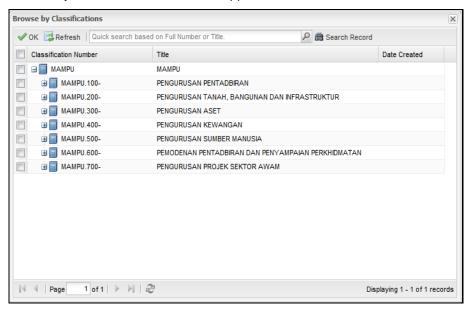
Fill in all the fields in the [Metadata] tab.

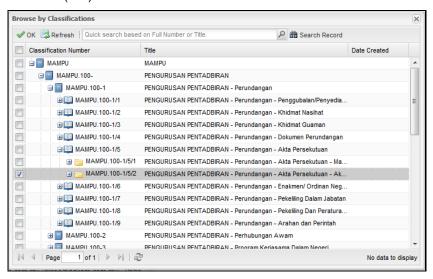
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5. On **Fail** filed, click button to find the "**Fail**" or button to clear **Fail** field.

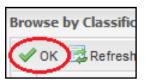


Browse by Classification screen will appear.





7. Click **[OK]** button to confirm. **[Refresh]** button to refresh the screen.



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The selected File will be filled automatically on the Fail field.



8. Click [Minutes] tab.

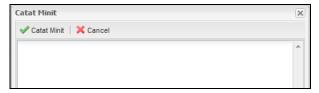


9. Click [] button to fill in **Minit** field.

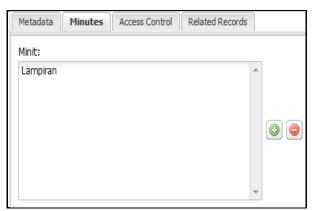
Note: [] button to clear *Minit* field.



Catat Minit screen will appear.



10. Fill in *Catat Minit* field and **[Catat Minit]** button. Click **[Cancel]** button to cancel the action.



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11. Click [Save] button to save record or [Close] button to cancel.





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4.3.5 Capture Digital Document (Audio and Video)

Scenario:

When a user has a digital document such as audio and need to be captured into the system, they can upload using this feature.

a. Capture Digital Document (Audio and Video) Flow Chart

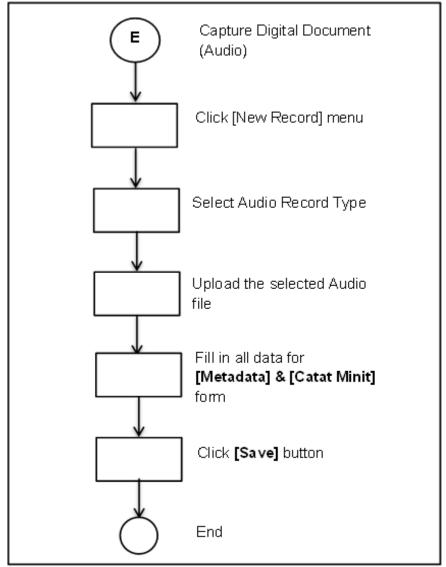


Figure 4.12: Capture Digital Document (Audio and Video) flow chart

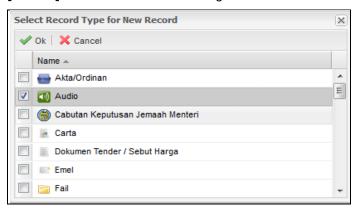
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b. Capture Digital Document (Audio and Video) Procedure

1. Go to [Create] menu, click [New Record].



[Select Record Type for New Record] window will be prompted. Click [Cancel] button is to cancel creating a record.



2. Click on **[OK]** button. Data entry form will be displayed.



- i. Every [Record Type] has its own metadata.
- ii. Field Label with red asterisk (*) is a mandatory metadata.

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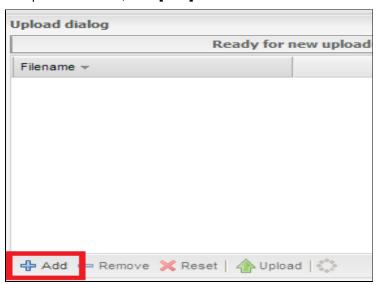
3. Click [Upload] button.



The Upload Dialog window will be prompted.



4. To upload audio file, click [Add] button.



A [Choose File To Upload'] window will be prompted. User can click on [Cancel] button to cancel the selection

- 5. Browse through the screen, choose the document to be uploaded and click the **[Open]** button OR double-click on the selected document. Others function on the screen listed below:
 - i. [Reset] button is to clear all listed document(s).
 - ii. [Remove] button is to remove the document(s) to be uploaded.

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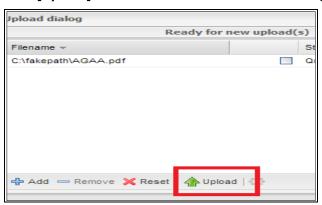
The selected document(s) to be uploaded will be listed on the **[Upload Dialog]** screen. There are two columns on the screen:

- i. Filename Name of the document that ready to upload.
- ii. **Status** Status of the document upload.

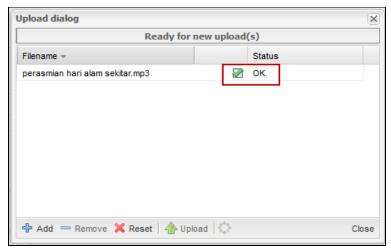


[Queued for upload] status will appear on Status column.

6. Click [Upload] button and Status column will be changed to [OK]



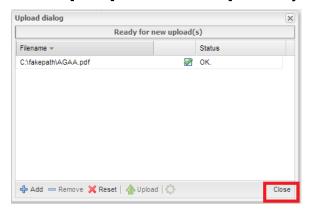
The following screen will be displayed:



Click [Reset] button to remove the record upload.

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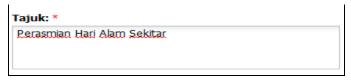
7. Click the [Close] button to return to [Data Entry Form]



The Data Entry Form will appear again.



8. Enter all metadata. Field Label with red asterisk (*) is a mandatory metadata Example:

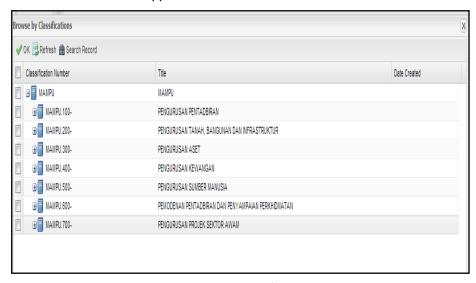


9. Search the File from **[Fail]** metadata by click the



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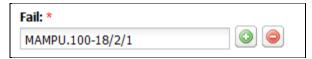
The Search Form will appear.



- i. Browse the Classification by click [$^{oxed{1}}$].
- ii. Double click selected file to select. The following screen will be displayed:



iii. **Data Entry Form** will appear. The selected file will be filled automatically on that Fail field.



Note: This field is mandatory

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iv. Fill in all the rest metadata:



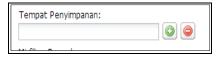
10. If this is Hybrid record, tick at [Hybrid].



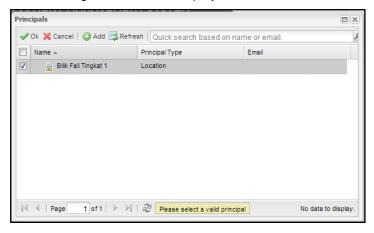
Note: This field is optional

If Hybrid box is checked, Tempat Penyimpanan field is mandatory to fill in.

11. Click [on [Tempat Penyimpanan] metadata to insert location of the hybrid record.

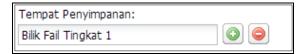


The following screen will be displayed:

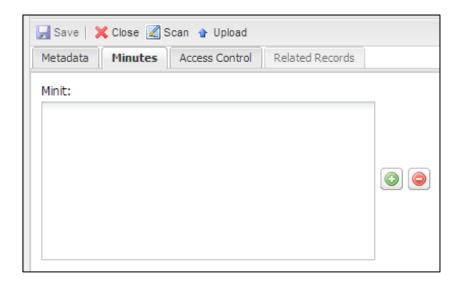


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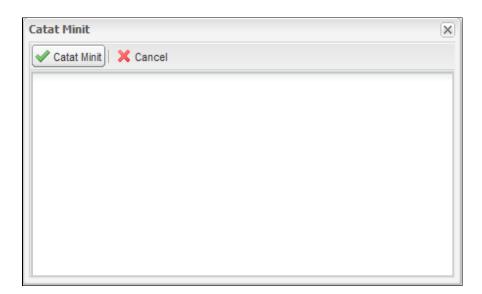
12. Tick on checkbox [Bilik Fail Tingkat 1] and click [OK] button. Data Entry Form will be appear.



13. Click on [Minutes] tab. The following screen will be displayed:



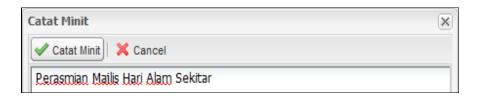
14. Click on [icon to add the minute. This [Catat Minit] window will be displayed:



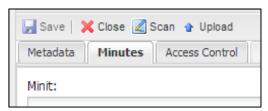
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15. Fill in the [Catat Minit] field and Click [Catat Minit] button to insert the minit.

The following screen will be displayed:



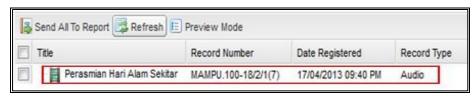
16. Click [Save] button to save the record.



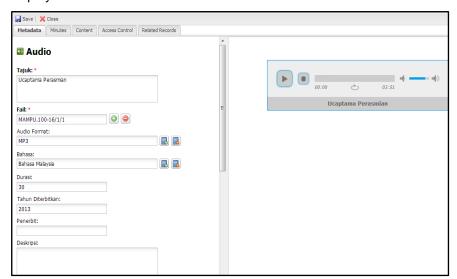
[Close] button to cancel creating a record. The following screen will be displayed.



Then the list of newly created record will be displayed.



17. Double click the record type to view the content. The following screen will be displayed:



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4.3.6 Routing Record through Email

Scenario:

When the user has a record that needs other party's actions on it. The system enables users to send a record via 'send by email' method.

a. Routing Record through Email Flow Chart

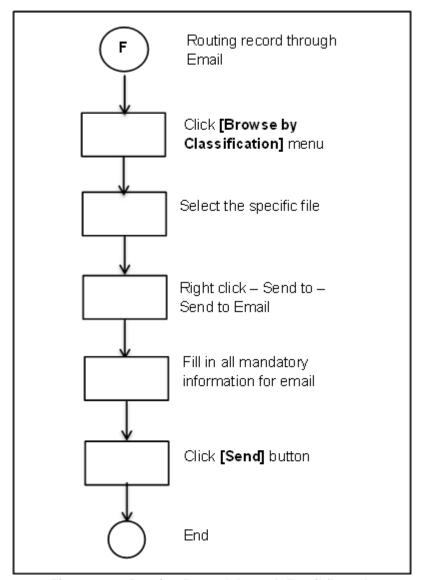


Figure 4.13: Routing Record through Email flow chart

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b. Routing Record through Email Procedure

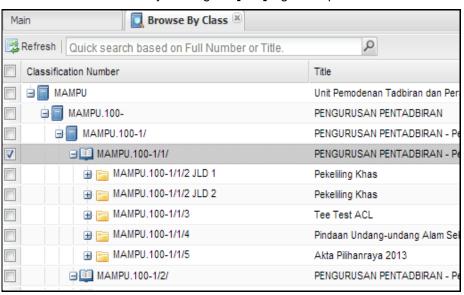
1. Go to [Disseminate] menu and click the [Browse By Classification].



Browse By Classification screen will appear on a new tab.

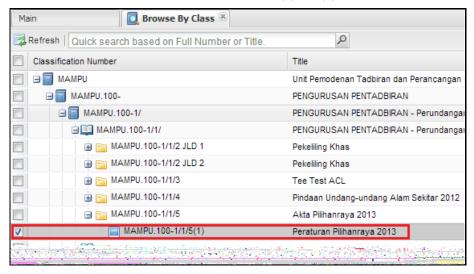


2. Browse the classification by clicking the $\begin{bmatrix} & & & & & & \\ & & & & & \end{bmatrix}$ sign to expand.

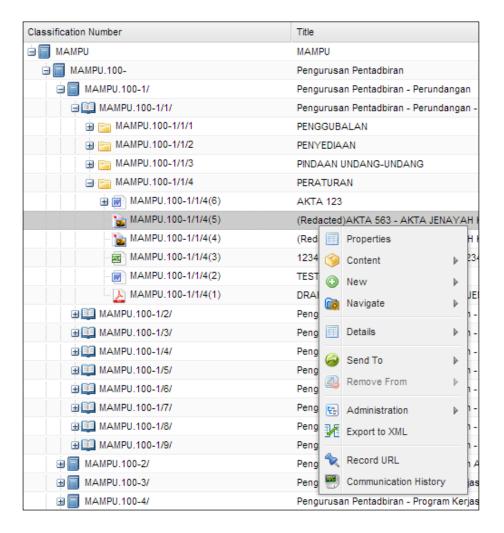


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3. Tick the checkbox to select the document(s)/File(s).

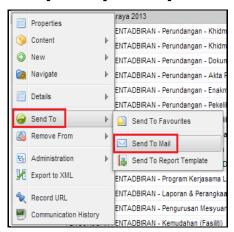


4. Right click the selected document(s)/File(s).

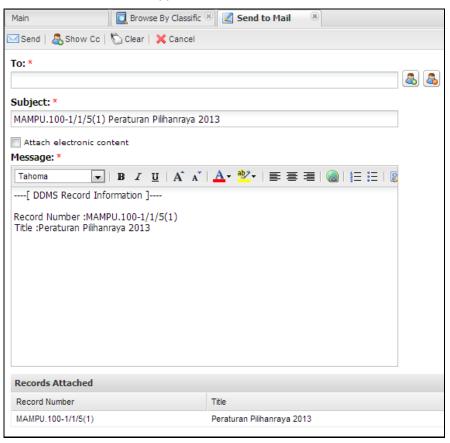


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5. Select [Send To] and click [Send To Mail].



Send To Mail screen will appear on a new tab.



Subject and Message field are automatically filled by the system.

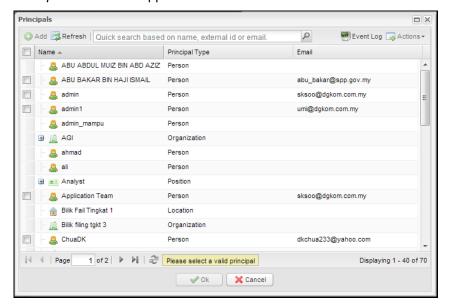
6. At **To:** field, click button to select an email address from Principals data.

Note: Click button clear the **To:** field.



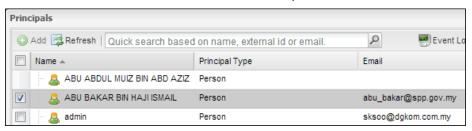
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Principals screen will appear.



If the email address is not registered in the system, user can key-in the email address at **To:** field. User can use comma "," as a separator between emails.

7. Browse and tick the checkbox to select the Principal with email address.



8. Click **[Ok]** button to confirm or **[Cancel]** button to cancel.





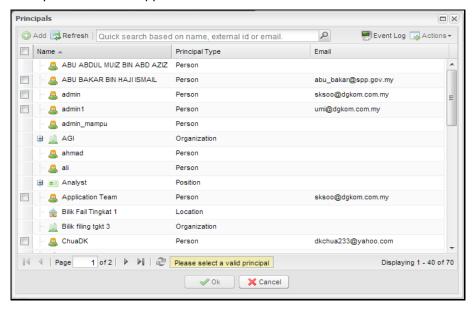
9. Click [Show Cc] button to show the Cc: field.



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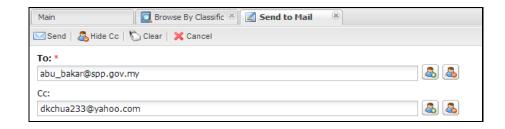
Principals screen will appear on user's screen.



11. Browse and tick the checkbox to select the Principal with email address.

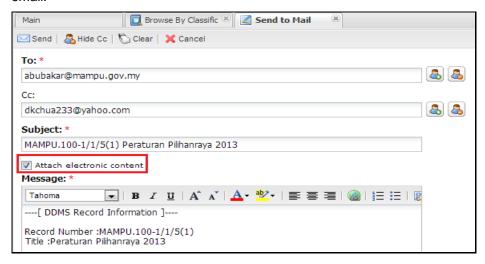


12. Click [Ok] button to confirm or [Cancel] button to cancel.

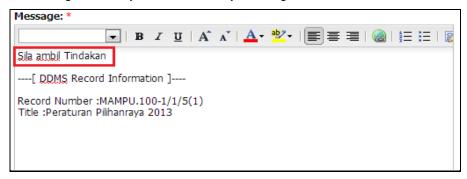


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13. Tick the *Attach Electronic Content* checkbox to attach the content with the email



14. At Message field, key in the necessary message.



The Message content can be formatted using the tools (Bold, Italic, font etc) inside the Message field.



15. Click [Send] button to proceed.



Other buttons and their function list are as below:

- i. [Hide Cc] button to hide the Cc: field.
- ii. [Clear] button to clear the entire field filled by user.
- iii. [Cancel] button to cancel.

'Email sent successfully' will appear for a successfully sent email.



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4.4 View

This is scenario to view the metadata and contents of all captured electronic documents. The electronic document including metadata can be retrieved by using search request or through browse by classification function.

4.4.1 View Records Flow Chart

a. Main View Records Flow Chart

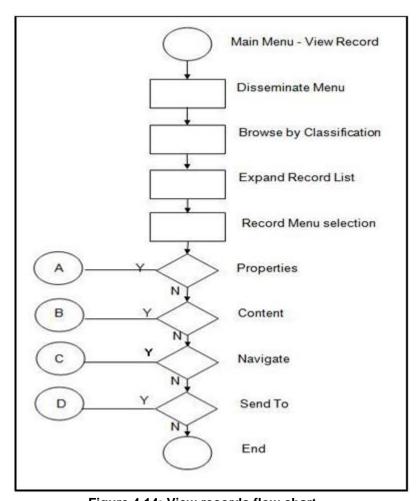


Figure 4.14: View records flow chart

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b. View Records -View Flow Chart

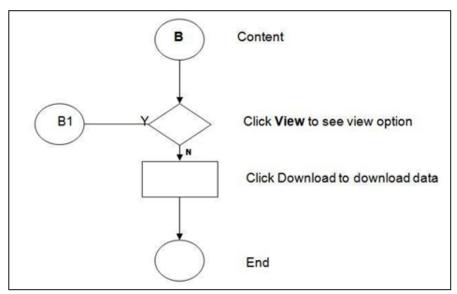


Figure 4.15: View records- Content flow chart

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i. Content-View Flow Chart

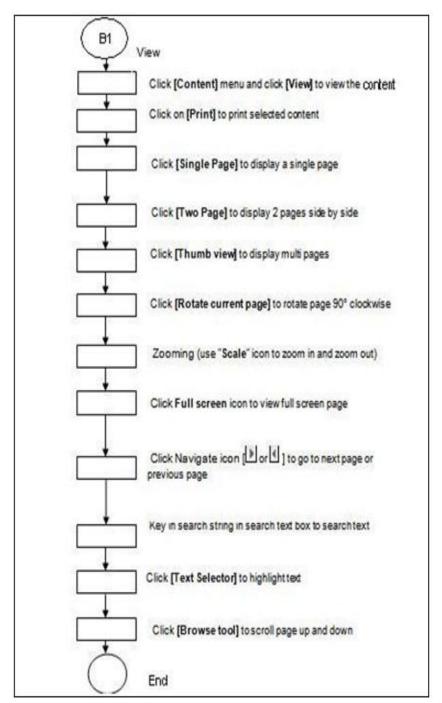


Figure 4.16: Content - View flow chart

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c. View Records - Navigate Flow Chart

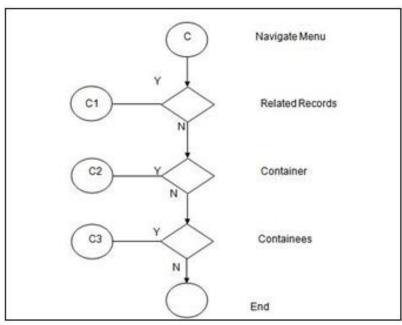


Figure 4.17: View Records -Navigate flow chart

i. Navigate - Related Records Flow Chart (C1)

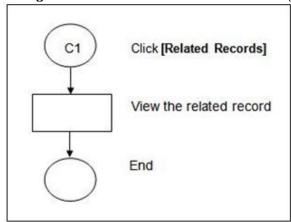


Figure 4.18: Navigate – Related records details flow chart

ii. Navigate - Container Flow Chart (C2)

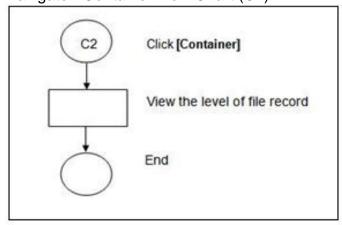


Figure 4.19: Navigate - Container flow chart

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iii. Navigate - Containees Flow Chart (C3)

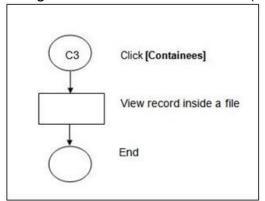


Figure 4.20: Navigate – Containees flow chart

d. View Records -Send to Flow Chart

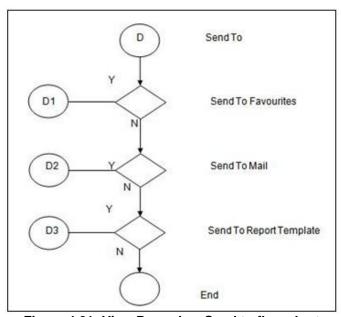


Figure 4.21: View Records – Send to flow chart

i. Send to – Send to Favorites Flow Chart (D1)

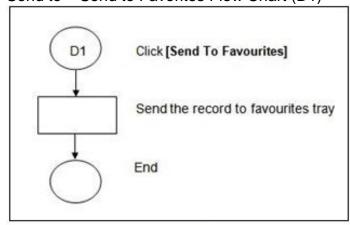


Figure 4.22: Send to – Send to Favourites flow chart

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ii. Send to – Send to Mail (D2)

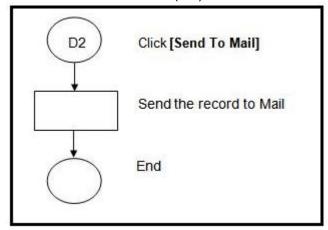


Figure 4.23: Send to – Send to Mail flow chart

iii. Send to Send to Report Templates (D3)

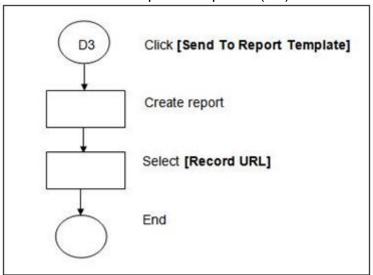


Figure 4.24: Send to – Send to Report Template flow chart

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4.4.2 View Records Procedure

1. From [Disseminate] menu click [Browse By Classification]



The new tab will appear as follow:

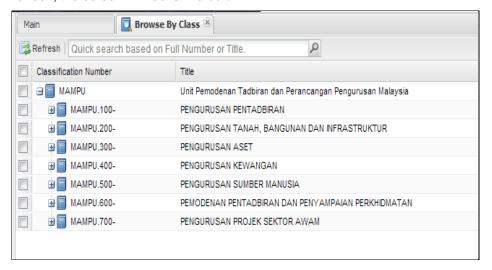


2. Click icon to expand the drop down list. The list will drop as follow:



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3. User can select [Refresh] icon to refresh the classification. After refresh, the screen will looks like below:

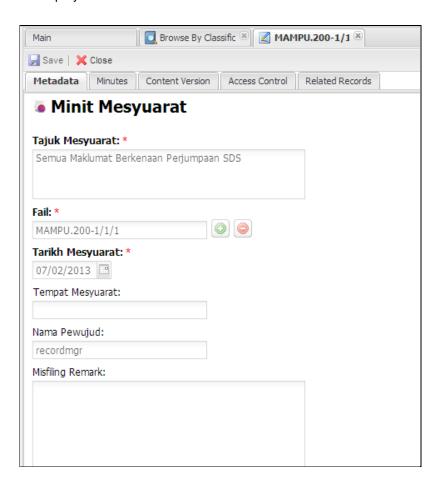


4. Click icon to expand the drop down list until the record level. The list will drop as follow:



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5. Click [Properties] menu item to view selected record metadata and its content.lt will be displayed:

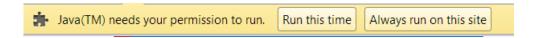


View content

6. Click [Content] menu then click [View] menu item to view the content of records.

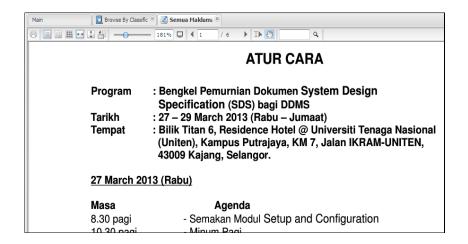


Notes: Java Runtime will appear. User need to allow in order viewing the content. If user still cannot view the content, please refer to Setting and Download module on downloads Java Runtime.



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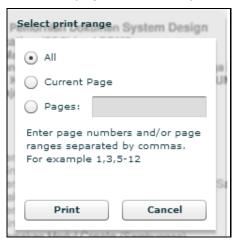
The content view will be displayed as below:



7. Click on [Print] icon.



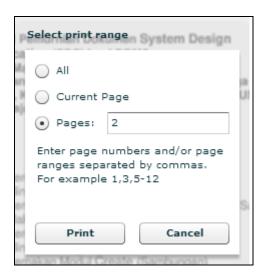
It will be displayed selection of print range



 Tick the radio button required. The user can either print All, Current Page or specific Pages.

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ii. For specific pages, please enter page number.



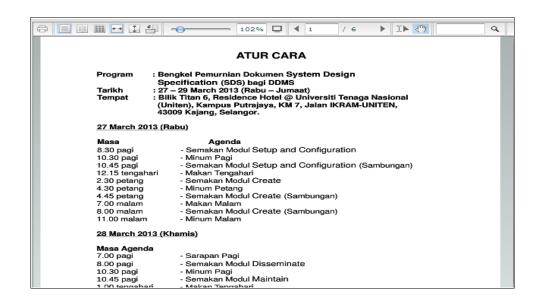
- iii. Click [Print] button to proceed and hard copy will be printed.
- iv. Click [Cancel] button to cancel.

Single Page View

8. Click [Single Page] icon to display a single page on screen.



The single page view will be displayed as below:



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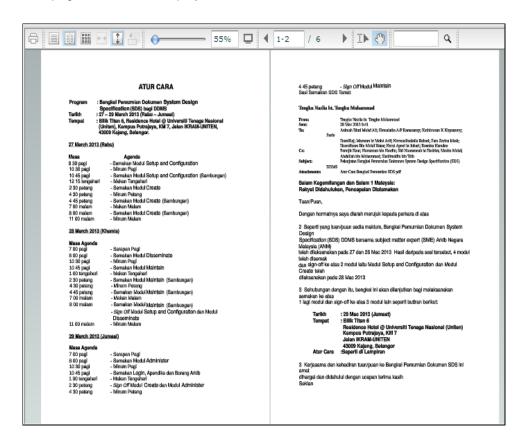
Two Page View

9. Click [Two Page] icon to display 2 pages side by side.



Two page view can not be used in fit width view and rotate view.

Two page view will be displayed as below:



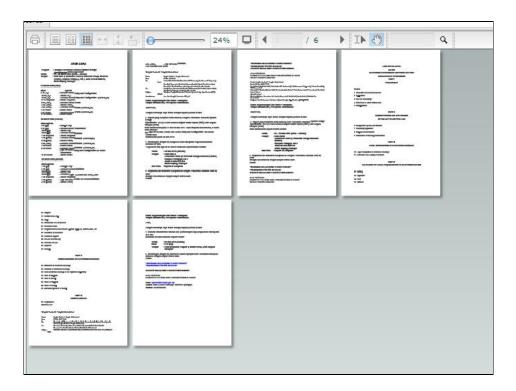
Thumb View

10. Click [Thumb view] to display multi pages at the thumb nail icons.



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This funtion can not be used in fit width view, fit page view and rotate page. The thumb view will be displayed as below:



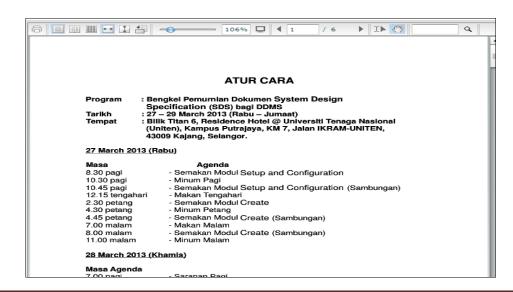
Fit Width

11. Click [Fit Width] to adjust page size to fit screen width.



This function can not be used in [Thumb View] and [Two Pages View].

The fir width view will be displayed as below:

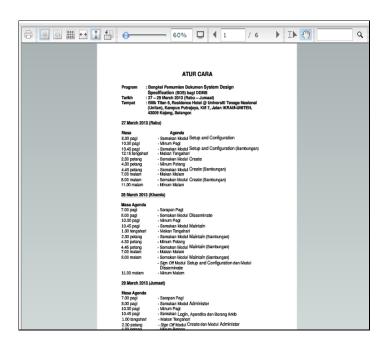


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12. Click [Fit Page] to adjust page size to fit in a single page view

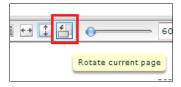


The fit page view will be displayed as below:

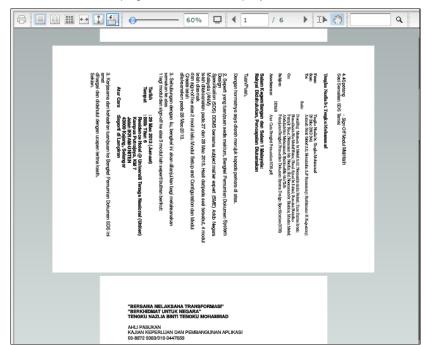


Rotate Current Page

13. Click [Rotate current page] to rotate current page 90° clockwise.



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The rotate current page view will be displayed as below:

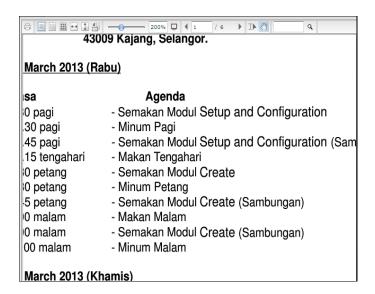
Zooming

14. User can use "Scale" icon to zoom in and zoom out the document.

a) Zoom in



The zooming view will be displayed as below:

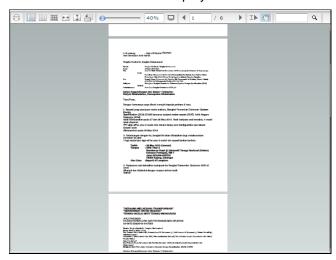


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b) Zoom out

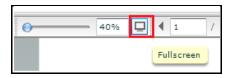


The zoom out view will be displayed as below:

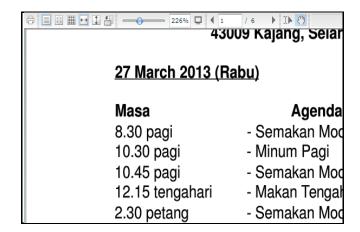


Full Screen

- 15. For full screen, user can use "Full screen"
 - i. Click full screen icon.



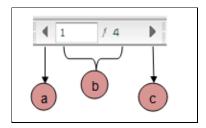
The full screen view will be displayed as below:



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Navigate Page

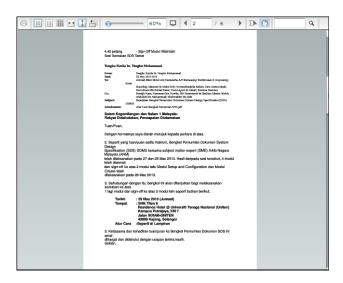
16. User can click to go to next page or click to go to previous page.



- a. Previous page
- b. Current page / Total page
- c. Next page

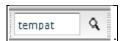
Alternatively enter page number to go to the target page.

It displays:



Search Text

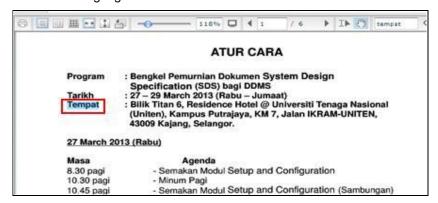
17. Key in search string in search text box to search text(s) within the content.



Notes: This function only applicable for Word document only and not applicable for picture.

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Text will be highlighted as shown:



- i. Continue searching by clicking button.
- ii. When finished searching, the following message box will be displayed:

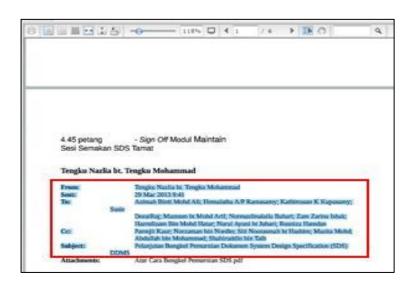


Text Selector or Browse

18. Click [Text Selector] , and then drag along the text to make selection.



The selected text will be highlighted:

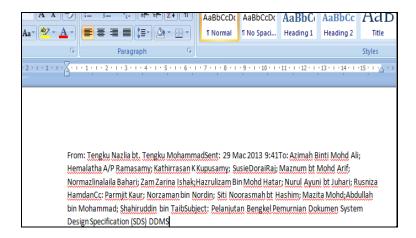


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 Right click at selected text, and then click [Copy]. The following window will pop-up:



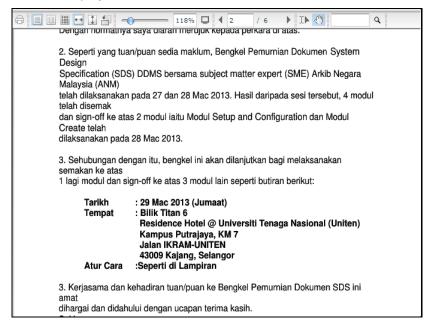
ii. Paste the copy text into destinated document. Screen below shows that the text is paste into Microsoft Word:



19. Click [Browse tool] to revert to scroll mode in order to scroll page up and down.



It will be displayed:

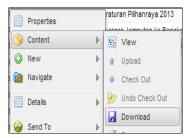


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Content

From this content menu, it allows user to download record from server into their local computer.

20. Click [Content] menu and then click [Download] menu item to download the content.



It displays:



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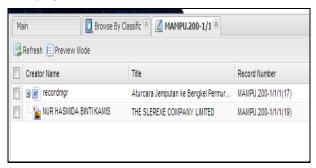
Navigate

Notes: This menu can be used to refresh containees list, navigate to the related records, navigate to the latest volume, navigate to the next volume, navigate to the previous volume, navigate to all volumes, navigate to the container and navigate to the containees for the currently selected record.

21. Click [Navigate] menu and then click [Related Records] menu item to show the related record for selected record.



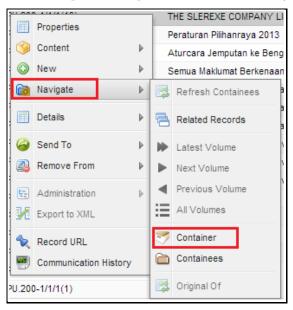
It displays:



If the selected record does not have related record, then it will be displayed the screen without any record.

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- 22. Click [Navigate] menu.
- 23. Then click [Container] menu item to show the parent of the record.



It displays:

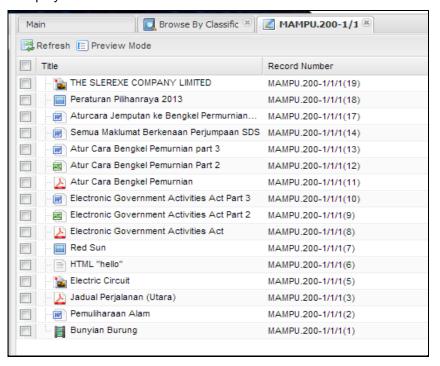


24. Click [Navigate] menu, and click [Containees] menu item to show the record inside the file.



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It displays:



Details

This menu allows user to add notes into a selected record.

25. Select [Details] and click [Catat Minit] for enabling the user to add minit.

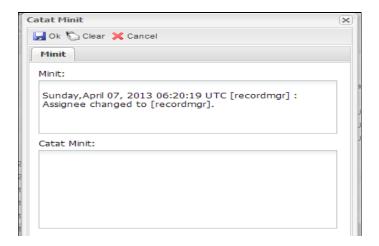


i. Insert the minit in Catat Minit text box and click [OK] button to save.

To check the minit of the record

- i. At [Browse by Classification] screen, click button at the upper left.
- ii. Expand the classification level and choose the respective record. Double click the record and click the minit tab to view the minit.It displays :

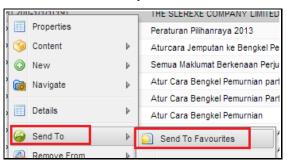
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Send To Favourites

This menu allows the user to select their frequently used records to be sent into Favourites folder.

26. Click [Send To] menu. And click [Send To Favourites] menu item to send the record to favourites tray.



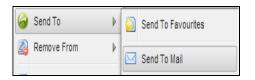
It displays:



Send To Mail

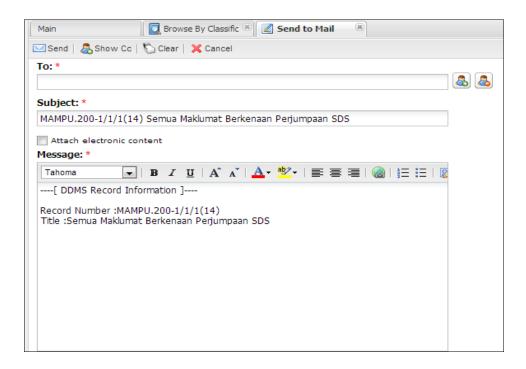
This menu allows the user to select a record and send it directly to the recipient's email.

27. Mouse over to select [Send To] menu and click [Send To Mail] to enable user send the mail.



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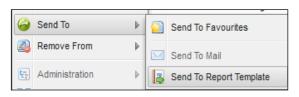
It displays:



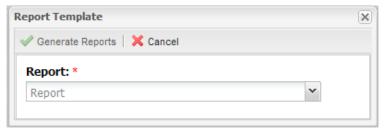
Send To Template

This menu allows the user to select a record to generate reports from the provided templates.

28. Select [Send To] menu and click [Send To Report Template] to enable user create report.



It displays:

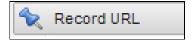


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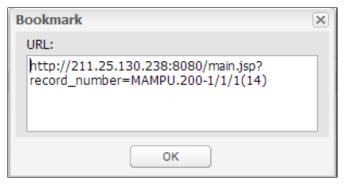
Record URL

This option allows user to view the URL of the selected record.

29. Select [Record URL] to displays the URL of the record.



It displays:



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4.5 Download Content

This is a scenario for the user to download the content of the electronic document from the system. The downloaded document content should be viewed or edited by their native software application installed on the local computer

4.5.1 Download Content Flow Chart

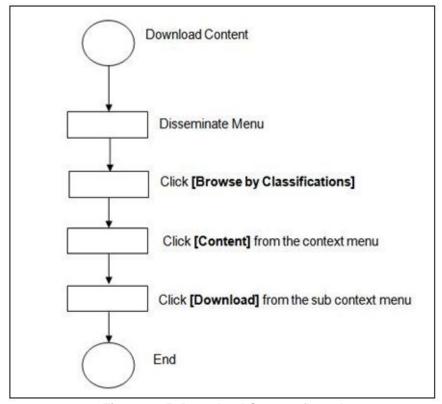


Figure 4.25: Download Content flow chart

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4.5.2 Download Content Procedure

1. From [Disseminate] menu click [Browse by Classifications].



The new tab will appear as follow:

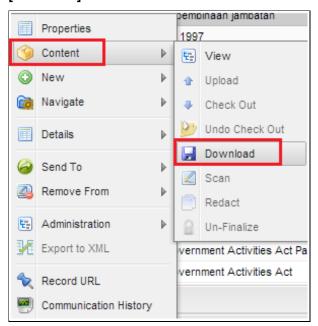


2. Browse the classification until record level and select the record.



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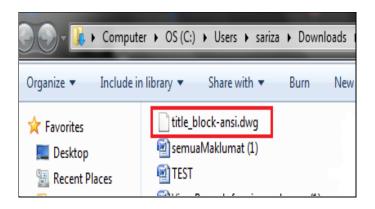
3. Right click on selected record, click [Content] from the context menu, and click [Download] from the sub context menu.



The download process will be automatically run.



4. The location of the download depends on the browser setting for downloads. The content will be downloaded to the user download folder.



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4.6 Searching File or Record

There are two scenarios Searching File or Record.

- a. Quick Search; and
- b. Advance Search.

4.6.1 Main Searching File Flow Chart

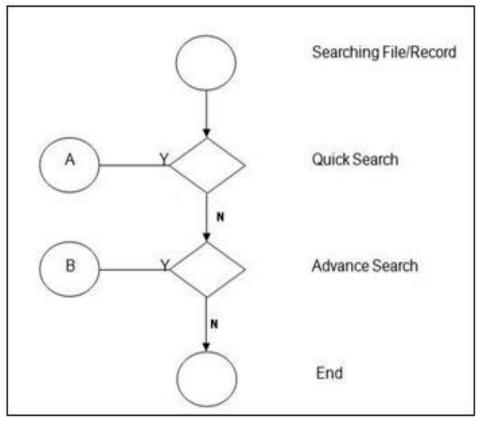


Figure 4.26: Main Searching File flow chart

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4.6.2 Quick Search

A Quick Search function is used to perform fast and simple searches. The Quick Search function can search words or phrases in the textual electronic content or the metadata of records that has been text-indexed by the system. To perform a quick search, use the search box located at the top right hand corner of the main page.

a. Quick Search Flow Chart

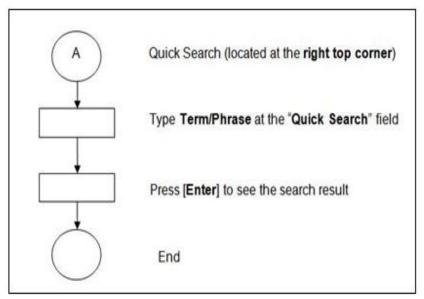


Figure 4.27: Quick Search flow chart

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b. Quick Search Procedure

Quick Search

 Quick Search bar is located at the right top corner of the window near the [Logout] button.



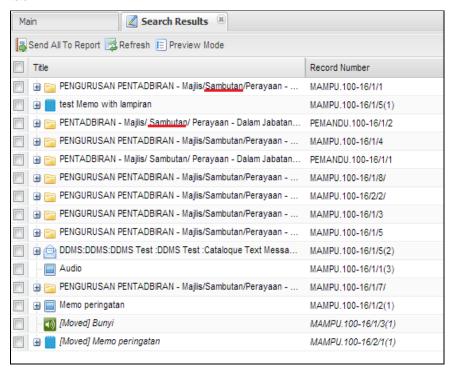
Search by Single Term

User can find a record by using a key word in the 'Quick Search' field

1. Enter word 'sambutan' at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



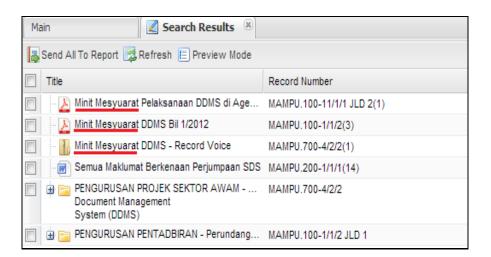
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Search using phrase

1. Enter phrase "minit mesyuarat" at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



Wildcard search - 'b?r?

The "?" symbol in search word or phrase represents any single character in search word or phrase.

Therefore if the user enters the search word "B?r?", then this will match records that contain the words "Biri", "Biro", "Bara".

(Basically it matches any word that starts with a "B", followed by any one character, then followed by "r" and then followed by any one character).

1. Enter 'b?r?' at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.

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Wildcard search - 't*n'

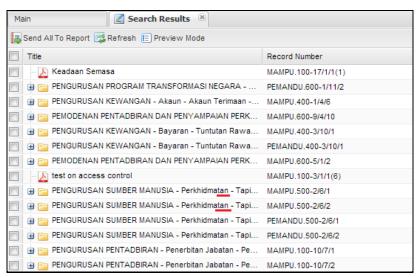
The "*" wildcard symbol represents zero or more characters in the search word or phrase.

Therefore if the user enters a search word such as "t*n", then this would match records that contains the word "teen", or "tin", "television" (in other words, any word that begins with a "t" then followed by zero or more characters then followed by an "n").

1. Enter 't*n' at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



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Boolean Search Using OR

The OR operator is the default conjunction operator.

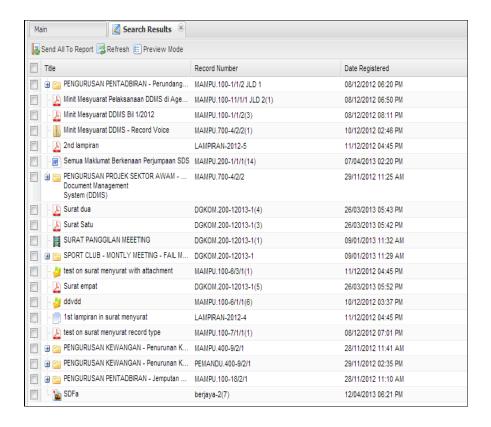
This means that when no Boolean operator between two terms, the OR operator is used. The OR operator links two terms and finds a matching document if either of the terms exist in a document. (in more technical terms: This is equivalent to union using sets).

The symbol || can be used in place of the word OR.

1. Enter ["minit mesyuarat" OR "surat"] OR ["minit mesyurat" || "surat"] at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



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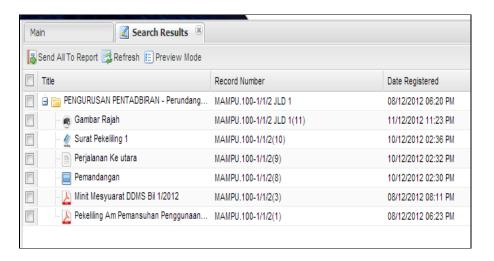
Boolean Search using AND

The **AND** operator matches documents where both terms exist anywhere in the text of a single document. This is equivalent to an intersection using sets. The symbol **&&** can be used in place of the word **AND**.

Enter ["surat pekeliling" AND "mesyuarat"]OR [surat pekeliling" &&
 "mesyuarat"] at the "Quick Search" field.



2. Press [Enter] or icon. Search Result screen will appear on a new tab.



Boolean Search Using " + " operator

The "+" or *required* operator requires that the term after the "+" symbol exist somewhere in the text of a document.

For example when the user enters the search phrase "+bank negara", the system will return records that must contain the word "bank" and may (but not necessarily) contain the word "negara". Records that contain only "negara" but not "bank" will not be returned.

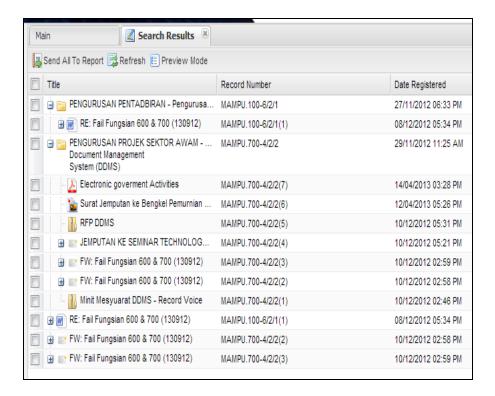
- To search for documents that must contain "Fail Fungsian" and may contain "mesyuarat" use the query:
- 2. Enter [+"fail fungsian" mesyurat] at the "Quick Search" field.

+"fail fungsian" mesyuarat

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3. Press [Enter] or click icon

Search Result screen will appear on a new tab.



Boolean Search Using' NOT'

The **NOT** operator excludes documents that contain the term after **NOT**. (In more technical terms:

This is equivalent to a difference using sets). The symbol! can be used in place of the word **NOT**.

The **NOT** operator cannot be used with just one term.

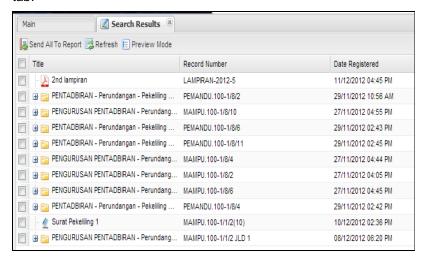
For example, the following search will return no results: NOT "surat mesyuarat".

1. Enter ["surat pekeliling" NOT "minit mesyuarat"] at the "Quick Search" field.

"surat pekeliling" NOT "minit mesyura

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2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



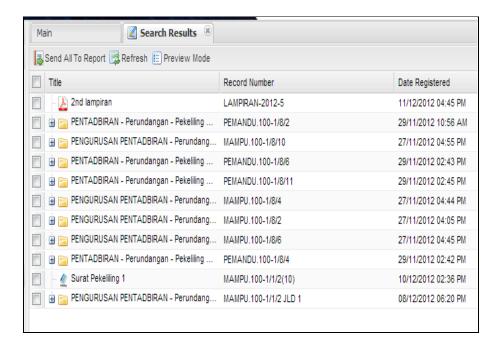
Boolean search using '-' operator

The "-" or *prohibit* operator excludes records that contain the term after the "-" symbol.

1. Enter ["surat pekeliling" - "minit mesyurat"] at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



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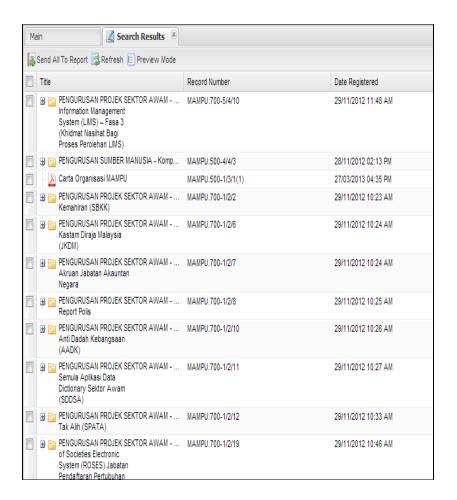
Fuzzy Search

To search for a term similar in spelling to "projek", user can use the fuzzy search. This finds records that contain words which are similar to the search term except for a few different characters.

1. Enter [projek~] at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



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Proximity Search

To search or find words which are within a specific distance away use the tilde, "~", symbol at the end of a Phrase.

Example to search for a "Kajian" and "ISO 9001" within 10 words of each other in a document use the search:

1. Enter ["Kajian MS ISO 9001"~10] at the "Quick Search" field.



2. Press [Enter] or click icon. Search Result screen will appear on a new tab.



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4.6.3 Advance Search

This is a scenario for Advance Search. Searching enables records discovery by using keywords, default metadata and any available custom metadata. However the search result will be depending on the access control (some records will not be seen by the user if does not have permission to discover them).

a. Advance Search Flow Chart

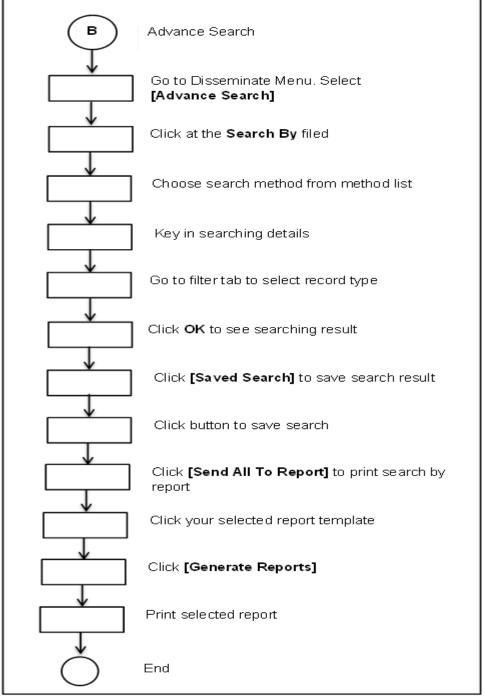


Figure 4.28: Advance Search flow chart

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b. Advance Search Procedure

Advance Search

1. From [Disseminate] menu, select [Advance Search].



Search form displays.



2. Click on icon at the **Search By** field.

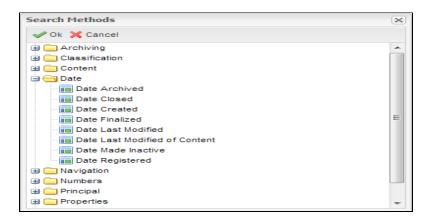


List of Search methods display as below:

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3. Click the plus button at [Date] folder. The following item will drop down.



4. Click [Date Registered] Date Registered click [Ok] button.

Following result will appear as follow.



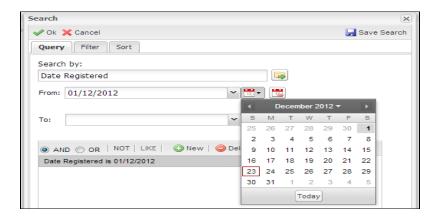
5. Click calendar button (red circle) below to select date "From" field.



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The calendar will appear:

Select date and it will automatically inserted into the "Form" field.

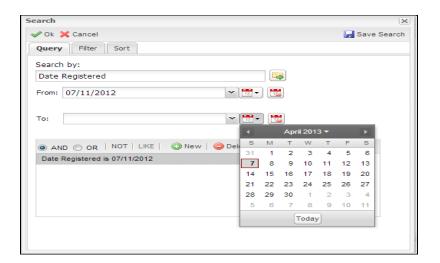


6. Click calendar button (red circle) below to select date "To" filed.



The calendar will appear:

Select date and it will automatically inserted into the "Form" field.



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7. User can choose boolean operators for more specific search.

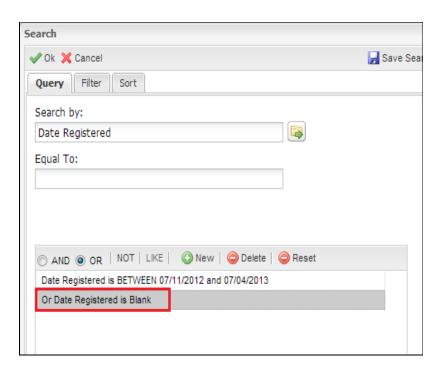
Other functions of Boolean Operators and search criteria function buttons are as follows:

- i. AND to refine a search to find only records which meet both the current search method and the previous search method. This narrows a search, returning fewer records in the Inquiry List but pinpointing the required records.
- ii. OR to expand a search to find all records which meet either the current or previous sets of search methods. This broadens a search, returning more records and including a wider subject range.
- iii. NOT: refines a search to include only records that meet the previous but not the current set of search methods. It is used in conjunction with the AND operation.
- iv. LIKE: is used to search for a specific pattern of the records that match with the criteria. It enables a searching to be part of the string using the wild card character.
- v. **New**: adds a new set of search methods at the bottom of the list in the Current Selection box.
- vi. **Delete**: deletes the currently highlighted set of search methods from the Current Selection box.
- vii. **Reset**: deletes all of the search methods from the current selection box so user can start a fresh search.

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- 8. Click on [New].
- 9. In this case we will use **OR** function. Tick **OR** radio button.

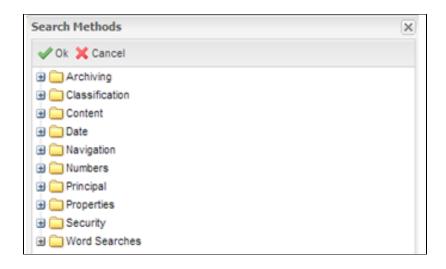
New line will be added:



10. Click at the **Search By** field.



List of Search Methods display as below:

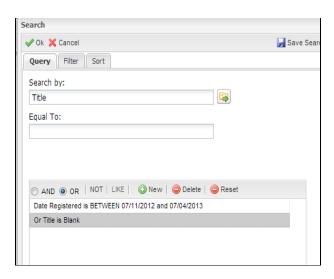


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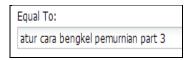
11. Click the 🖿 button at [Word Searches] folder and click [Title].



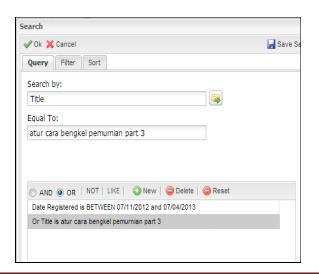
The following item will appear:



12. At the column "**Equal To**:", user neet to fill in the word title user want search.



The word "Blank" will change to "atur cara bengkel pemurnian part 3" as below:

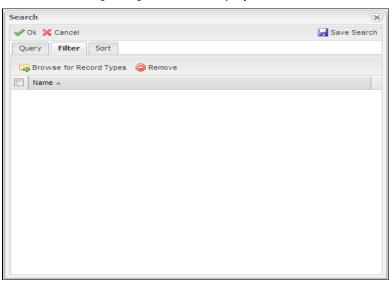


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13. Click the [Filter] tab as follow.



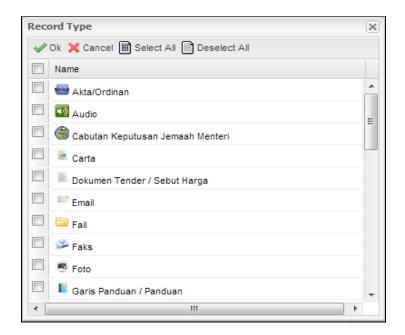
The conrtent for [Filter] tab will be displayed:



14. Click [Browse for Record Types] file icon.



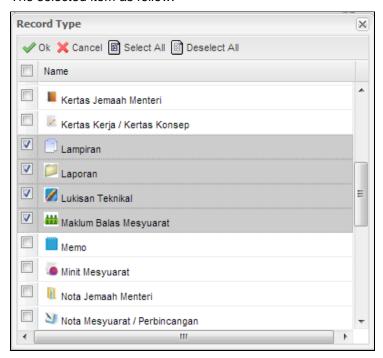
Dialog for Record Type will be displayed:



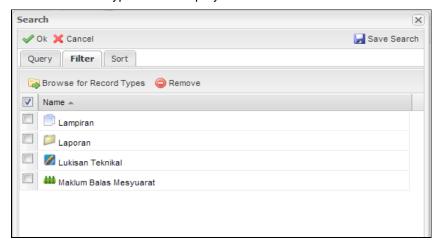
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15. Users can[Select All] icon or specific item. In this case we want to select Lampiran, Laporan, Lukisan Teknikal and Maklum Balas Mesyuarat.

The selected item as follow:



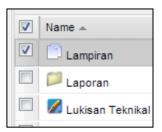
16. When it done, click **[Ok]** icon to fill selected item into **[Filter]**. Selected record type will be displayed:



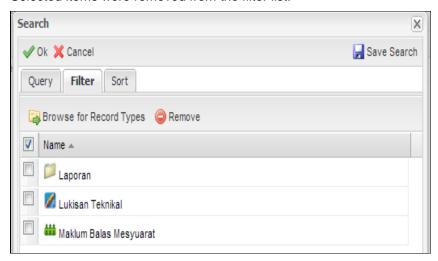
17. [Remove] button is used to remove selected record type for filtering.

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18. To remove filter item, select the record type and clik [Remove] icon.



Selected items were removed from the filter list.



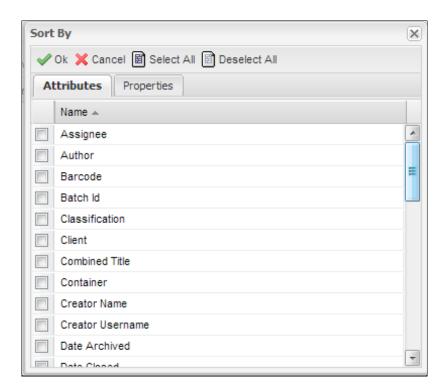
19. To specify sorting sequence, use the **Sort Tab.** Click on **[Sort]** tab. The content for [Sort] tab will be displayed.



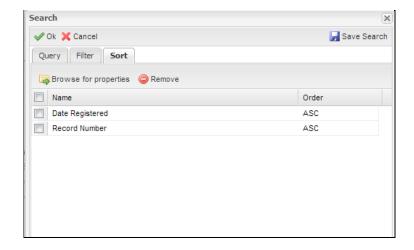
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i. Click [Browse for properties]

The following dialog box will be displayed:



- ii. Sort the result list based on the record properties or attributes.
- iii. There is two tab which are Attributes and Properties can choose.
- iv. Select "Date Registered" and "Record Number" from Attributes tab.
- v. Click [Ok] button. Properties will insert into sort :

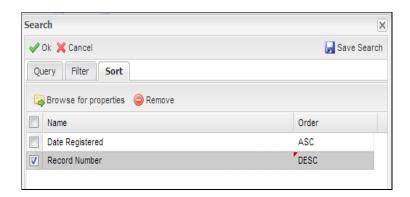


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vi. User can sort either want it Ascending "ASC" or Descending "DESC" by click at the beside.



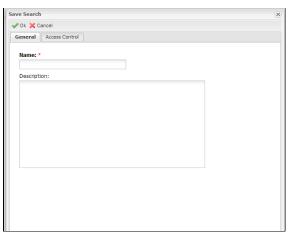
- vii. **[Remove]** button is used to remove selected record type for filtering.
- viii. To remove filter item, select the record type and clik [Remove] icon.



20. If user want to save the result, user can cllick on the **[Saved Search]** icon that located upper right.

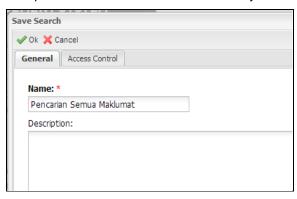


The save search dialog box will appear:



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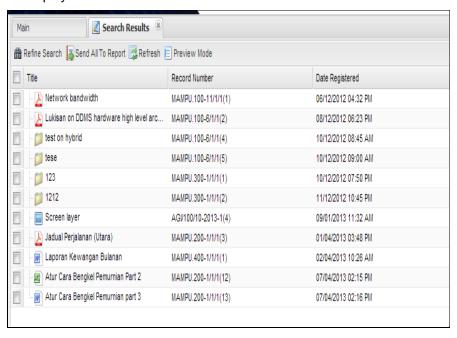
21. Fill up the form. Item marked is mandotary.



22. Click button to save search. If successful, the following message will be displayed.



23. Or click **[Cancel]** button to cacel the search. The result of Advance search will be displayed.

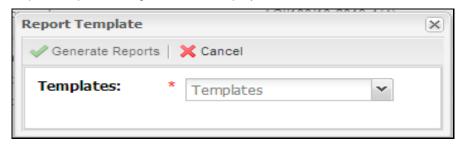


24. User can print search by report. Click [Send All To Report].

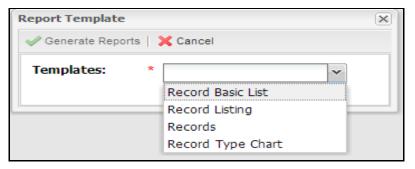


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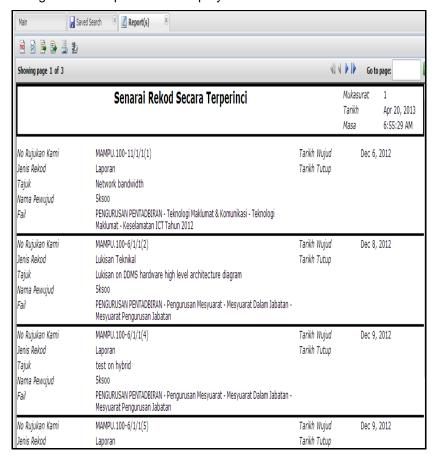
Report template dialog box will be displayed



- Click drop down menu from report template and click your selected template.
- ii. Click [Generate Reports].

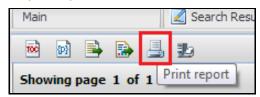


The generated report will be displayed:

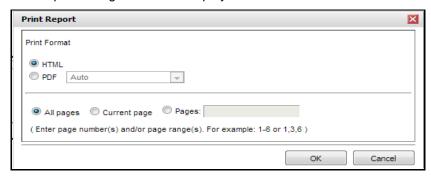


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iii. To print report, click button.



Print report dialog box will be displayed.



- iv. Setup your required format and pages.
- v. Click [Ok] to continue
- vi. Or click [Cancel] to cancel process.

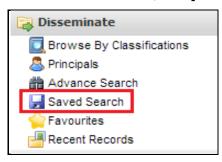
Dialog box PDF format will be displayed:



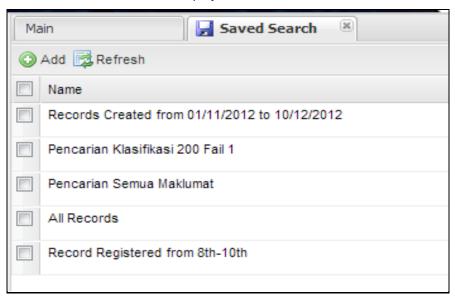
vii. Click button to start printing. Hard copy will be printed out.

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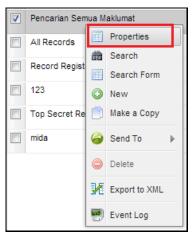
25. To edit the saved search, click [Saved Search] from [Disseminate] menu.



Tab for saved search will be displayed.



i. From saved search list, right click and clik [Properties].



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The following dialog box will be displayed:



- ii. User can edit the save search.
- iii. Go to [Access Control] tab



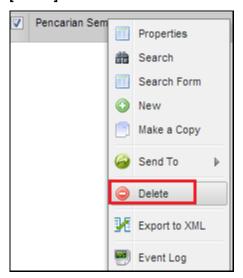
- iv. Mohd Arnizam Md Aris now can edit the saved search.
- v. Click [Save] button after done edit.

Saved search will change after save :

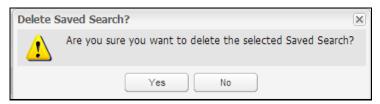


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vi. User can delete [Saved Search] by right click on save search. Select [Delete].

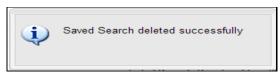


Dialog box will appear for permission:

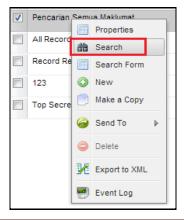


- Click [Yes] to proceed.
- Or click [Cancel] if user do not want o proceed.
- If deletion is success, the following message will be displayed

Information message will appear after click yes button :

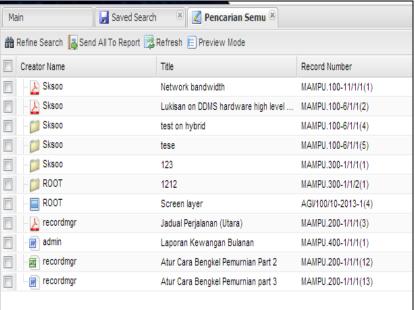


vii. User can use [Saved Search] by right click the saved search and click [Search].



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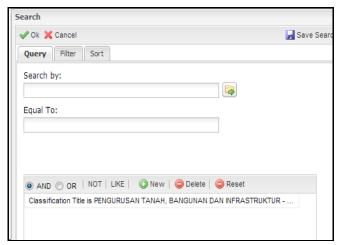
The following list of results will be displayed:



viii. To refine the search query for more precise or extended result, click [Refine Search] icon.



ix. This step will open back the "**Search**" window displaying previously defined search query.



Note: User may refer back to step 1 - 24 for advance search guidance.

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4.7 Maintain Favourites Tray List

Add files or records that are frequently used to favourites tray for quick access in the future.

4.7.1 Maintain Favourites Tray List Flow Chart

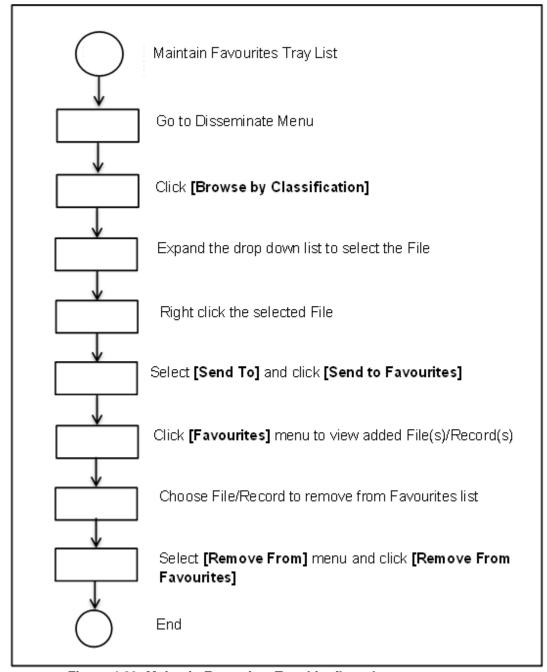


Figure 4.29: Maintain Favourites Tray List flow chart

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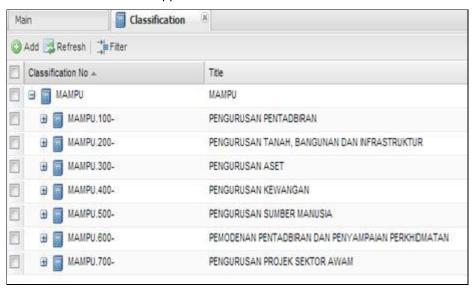
4.7.2 Maintain Favourites Tray List Procedure

Adding File(s) or Record(s) to Favourites tray by using [Send To Favourites] context menu.

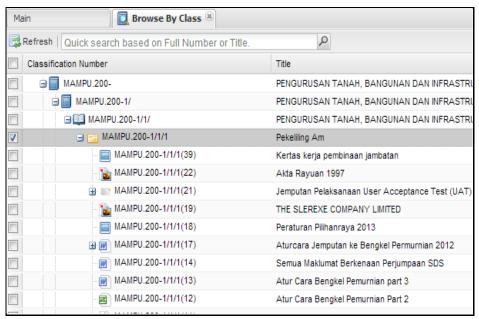
1. From [Disseminate] menu click o[Browse by Classification].



Classification screen will appear on a new tab.

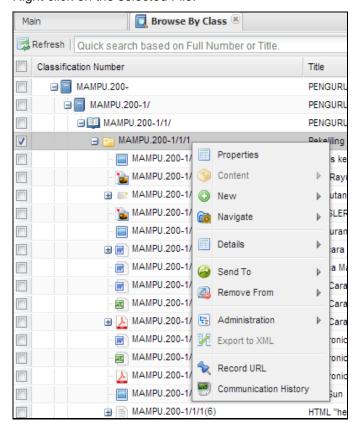


2. Click icon to expand the drop down list.

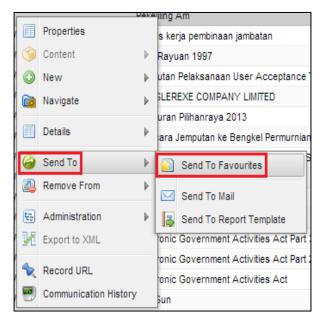


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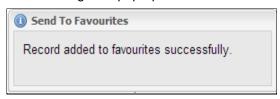
3. Right click on the selected File.



4. The following alert message will be displayed:



Alert message will pop-up as below:



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5. Select [Disseminate] menu and click [Favourites] to view added File(s)/Record(s).

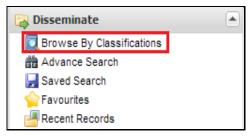


New added file(s)/record(s) will appear in Favourites list.



Adding File(s) or Record(s) to Favourites tray by dragging the selected to Favourites menu.

1. From [Disseminate] menu click [Browse by Classification].

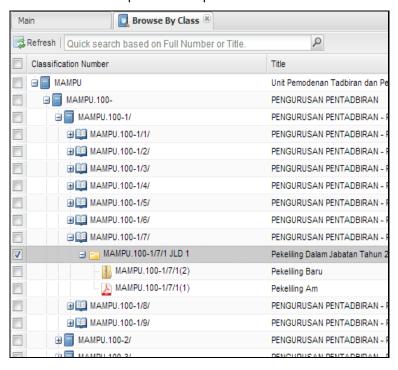


Classification screen will appear on a new tab.

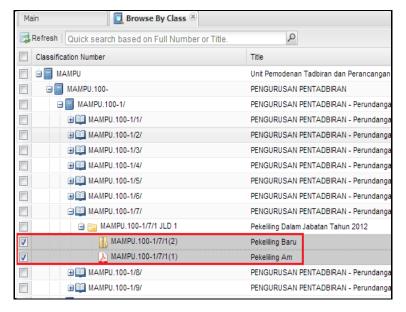


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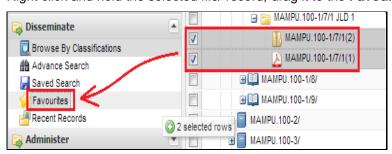
2. Click icon to expand the drop down list.



3. Tick the checkboc to select record/file.



4. Right click and hold the selected file/ record, drag it to the **Favourites** menu.



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Successfully message will appear.



5. Select [Disseminate] menu and click [Favourites] to view added File(s)/Record(s).



New added files(s)/record(s) will appear in Favourites list.



Removing the File(s)/Record(s) from the Favourites list.

1. Select [Disseminate] menu and click [Favourites] to view added File(s)/Record(s).

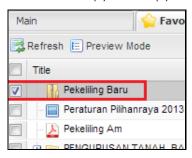


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Favourites screen will appear on a new tab.

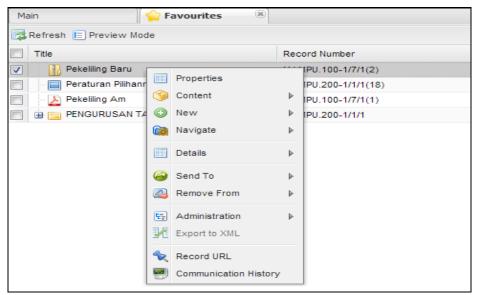


2. Select the File(s)/Record(s) to remove from Favourites list.



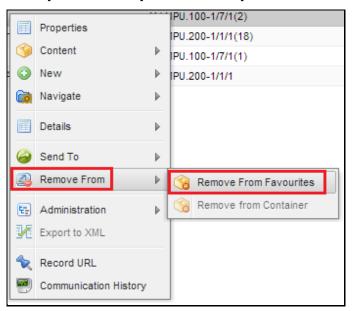


3. Right click on the selected File(s)/Record(s).



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4. Select [Remove From] menu and click [Remove From Favourites].



If success, the following message will be displayed:



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4.8 Recent Records

Scenario:

When the user need to find the records recently accessed or modified by him/her. This tray allows user to access the records without having to perform a search. The Recent Records Tray displays all the records that have been recently created, accessed or modified by the current logged on user. The records accessed by the current logged on user within the past 15 days will be kept in the Recent Record Tray and it is limited to the last 30 records only.

4.8.1 Recent Records Flow Chart

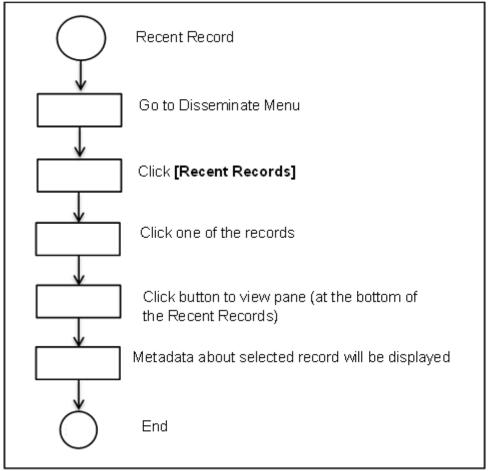


Figure 4.30: Recent Record flow chart

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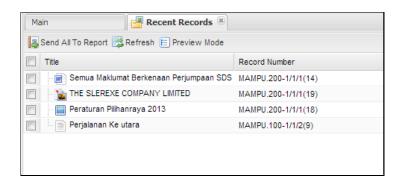
4.8.2 Recent Records Procedure

1. In [Disseminate] menu, select [Recent Records].



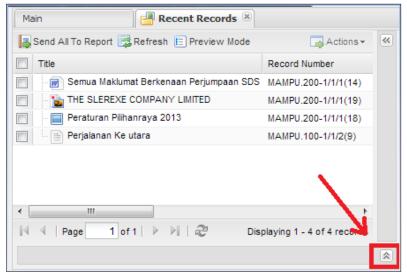
List of Recently record will be displayed.

Note: By default recent record screen is displayed in normal mode.



2. At the bottom right hand corner of the Recent Records window, there is a button to





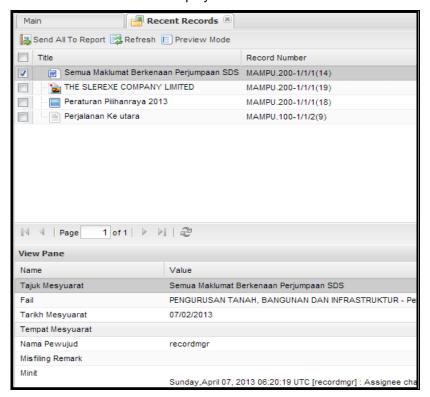
3. Select one of the record in the recent record list window.

Example like below:

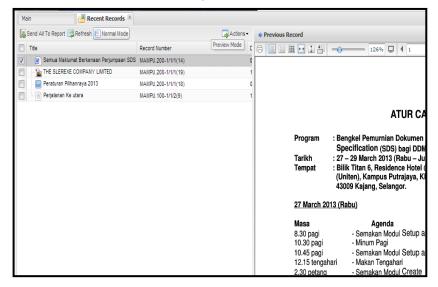


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4. Click icon. It will be displayed the metadata about the selected record :



5. Click Preview Mode icon to preview the content



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6. Click icon to return back to normal mode :



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4.9 View Principal

Scenario:

A Principal object may be used to represent a user, a role / position, a user group, an organizational unit, an organization or a venue / place. Here user is able to view other user's information such as name of user or department.

4.9.1 View Principal Flow Chart

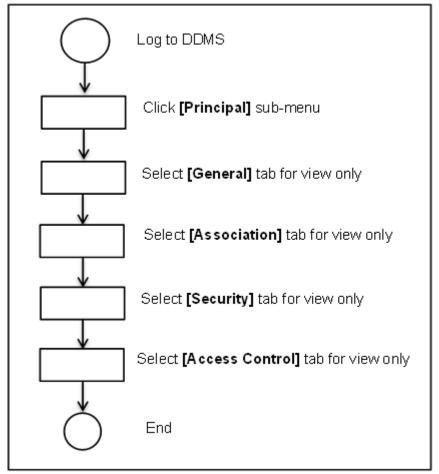


Figure 4.31: View Principal flow chart

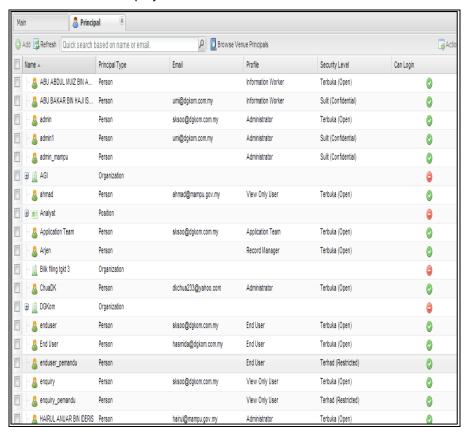
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4.9.2 View Principal Procedure

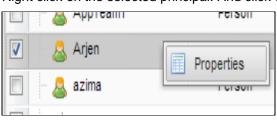
1. Search the principal by [Disseminate] menu, click [Principal]



The screen below displays:

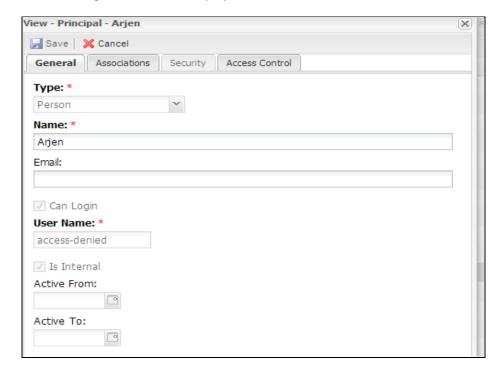


2. Right click on the selected principal. And click on [Properties] menu item.



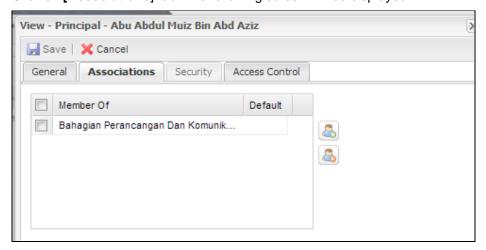
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The following screen will be displayed



Click [Cancel] is to close the window

3. Click on [Associations] tab. The following screen will be displayed

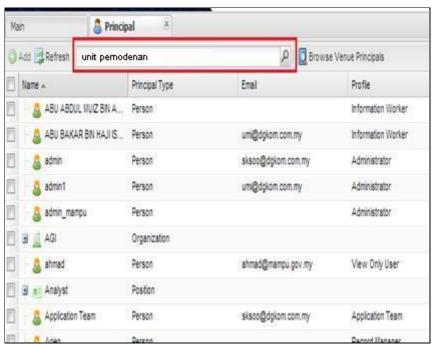


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4. Click on [Access Control] tab. The following screen will be displayed:



- 5. To perform search for Principals.
 - i. Key in search text such as name of person, email or name of organization at the search column.

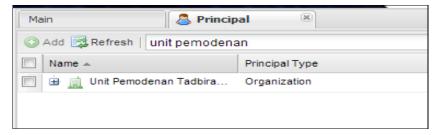


It will be displayed:

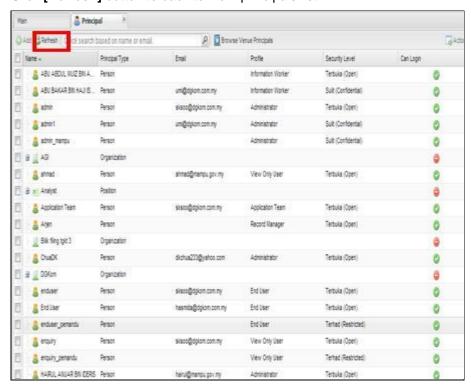
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ii. Press [Enter] or click button. The following result will be displayed:



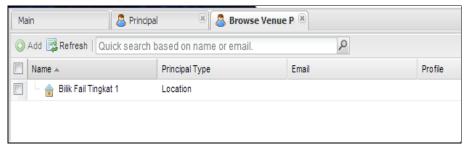
6. Click [Refresh] button to back to main principals list:



7. User also can search the venue of principal by clicking the "Browse Venue Principals" icon.



The display result will looks like below:



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