

User Manual

Document Management System

Version 1.0

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1. Introduction

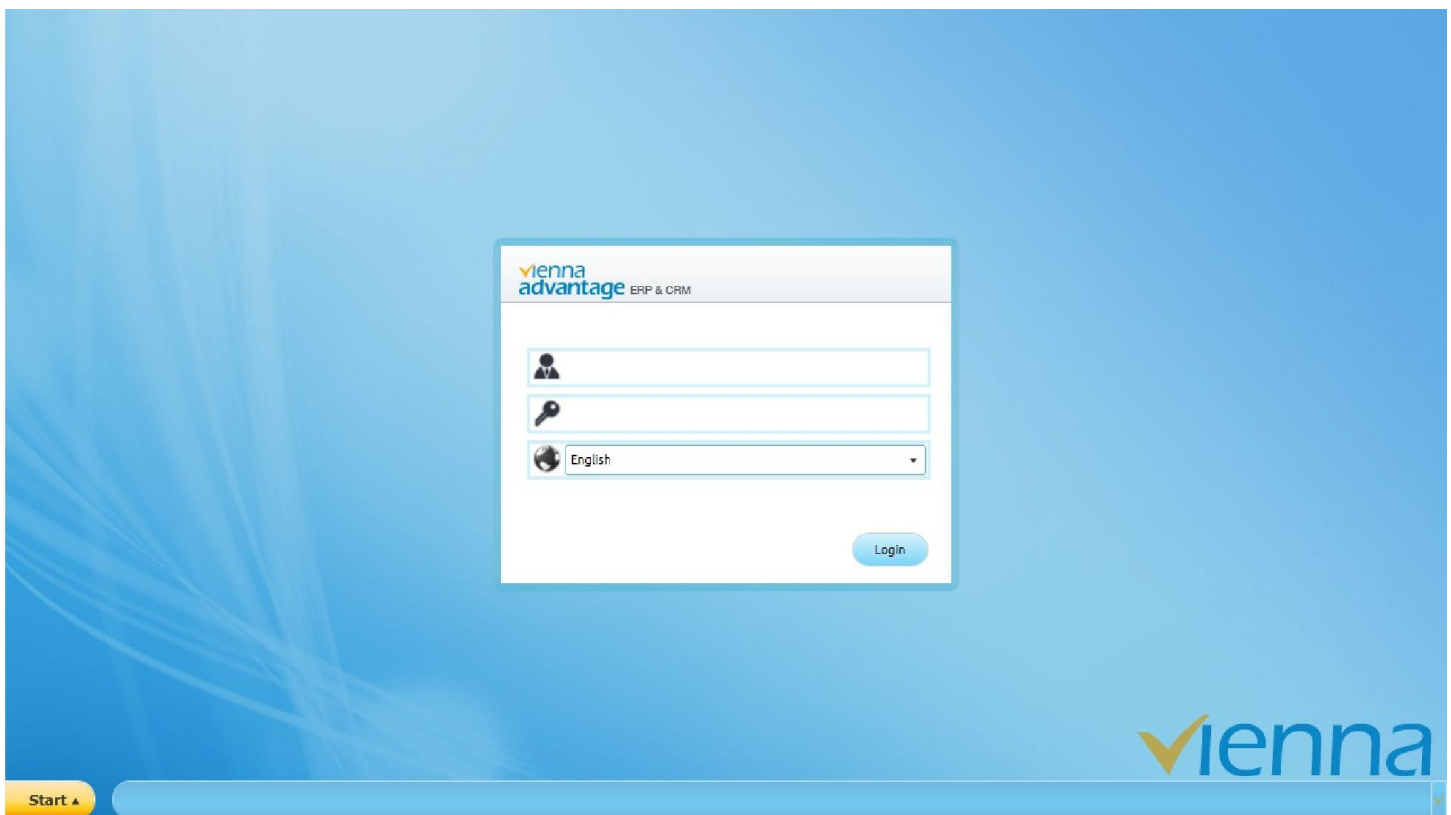
The Main scope of this document has prepared to make our client to understand the Document management System (DMS) and using of it with user friendly at client portal of our Vienna Advantage. This document is to be very simplified with examples and print screen shorts. Simultaneously it helps us to accelerate the implementation process of Vienna Advantage at the Client site. The purpose of presenting the screens, transactions, reports and workflows to the user for getting some more ideas to reach and satisfy the customer's all requirements during implementation period.

2. Objective

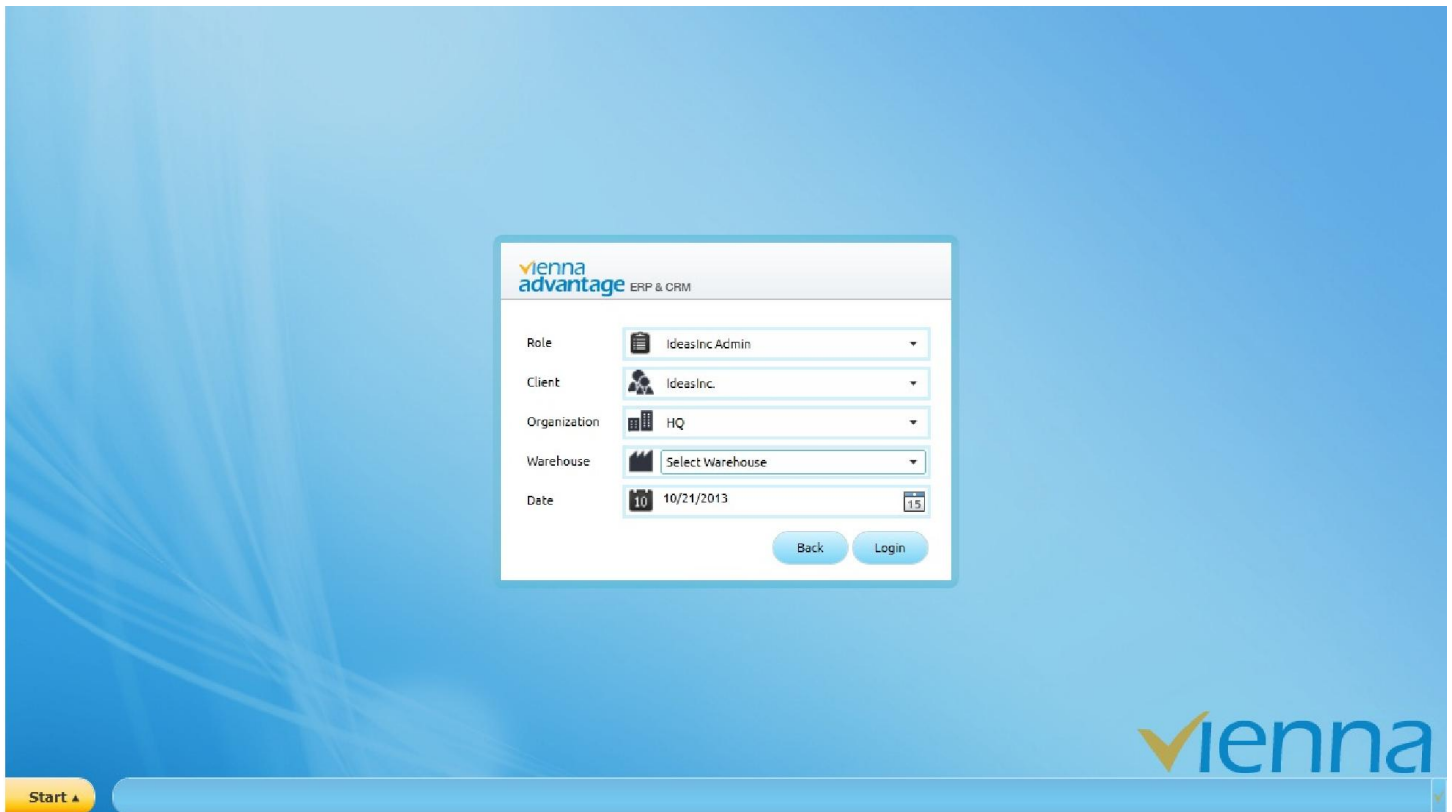
Objective of this document is to show the complete process flow to users about the Document Management System (DMS) in E-Governance system. Document contains the print shots and details of each and every step which user needs to follow to understand & to complete the Client managementprocess in E-Governance System.

3. Login to E-Governance System

Document Management System in the E-Governance System, User needs to login into client portal of E-Governance System with their credential provided to user.



Enter your User Name, Password, and Select a language.



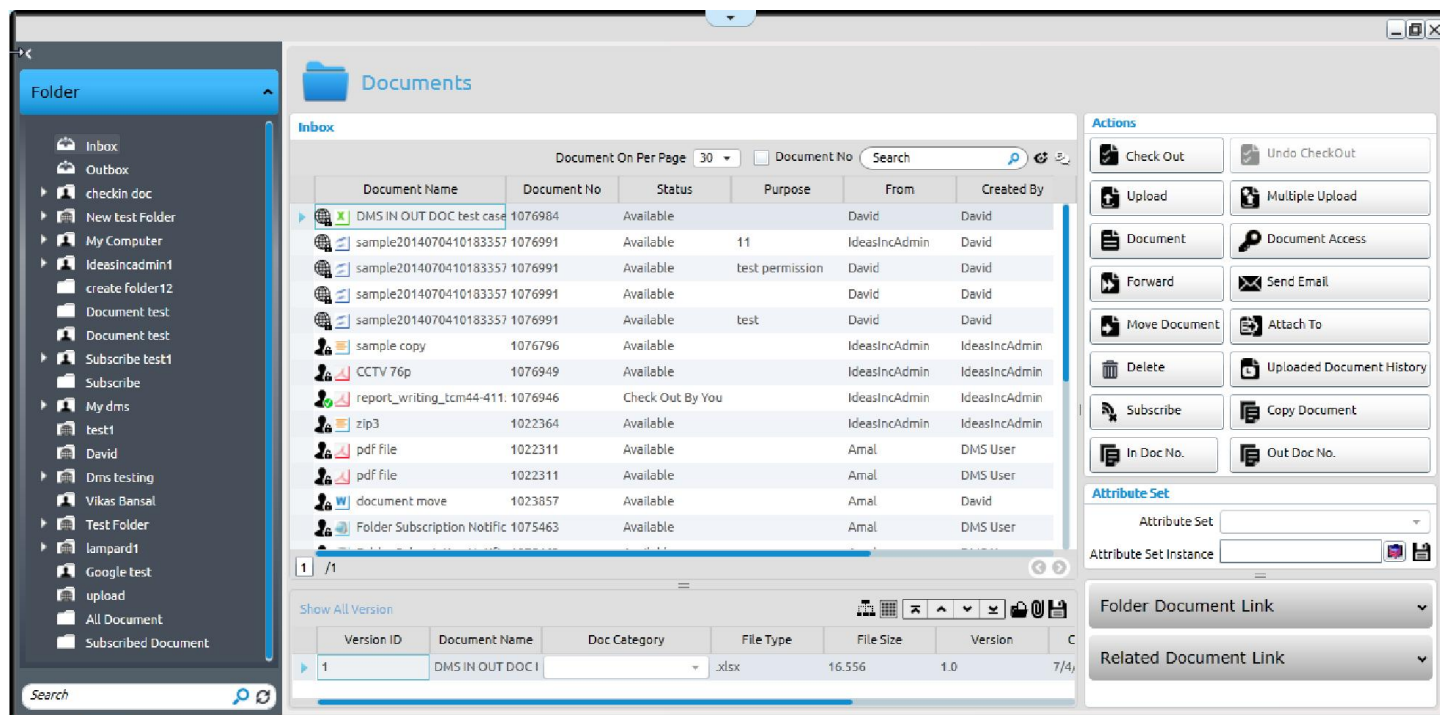
Select the Role, Client, Organization, Warehouse and Date. Your Role determines which windows, processes, reports, and such that you can access within Vienna Advantage.

Click the Login button to be brought to the Main window.

4. Document Management System (DMS) in E-Governance System

DMS is a system in which a user can upload, store and track electronic documents. Using this DMS a user can create, copy, move, forward, receive, edit, download, etc., documents. A user can keep track of a particular document by created different versions for each change. Using DMS, the manual paper work will be reduced and hence the paper cost can be saved in a firm.

DMS is integrated with the Vienna Advantage but it can also work as standalone system. A standard DMS user interface screen shot has been given below.



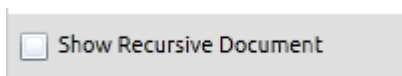
5. Exploring the Home Screen

DMS Home Screen contains the following sections,

a) Folder Panel

On the left side of DMS Window contains the folder panel in which all the folder permitted to view for the logged user will be listed. There are some default folder like inbox, outbox, all document and Subscribed Document folders. There is a search field given to search for a folder with name at the bottom of the folder panel.

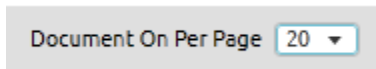
The folders are arranged in a tree structure that means a user can create folders as much as he wants in different levels. All documents will be displayed in the document panel of the selected folder. If a user want to show all document in the sub folders of the selected folder, then he/she should check the 'Show Recursive Documents' check box in the Document Panel.



b) Document Panel

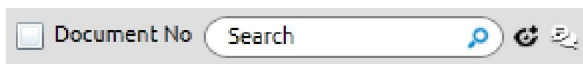
This panel is situated in the middle of the window. Here a user can see the details of a document such as name, document number, status, purpose, created, created by etc.,

User can define how much documents are to be shown at a time by selecting the dropdown list of the 'Document on per Page'



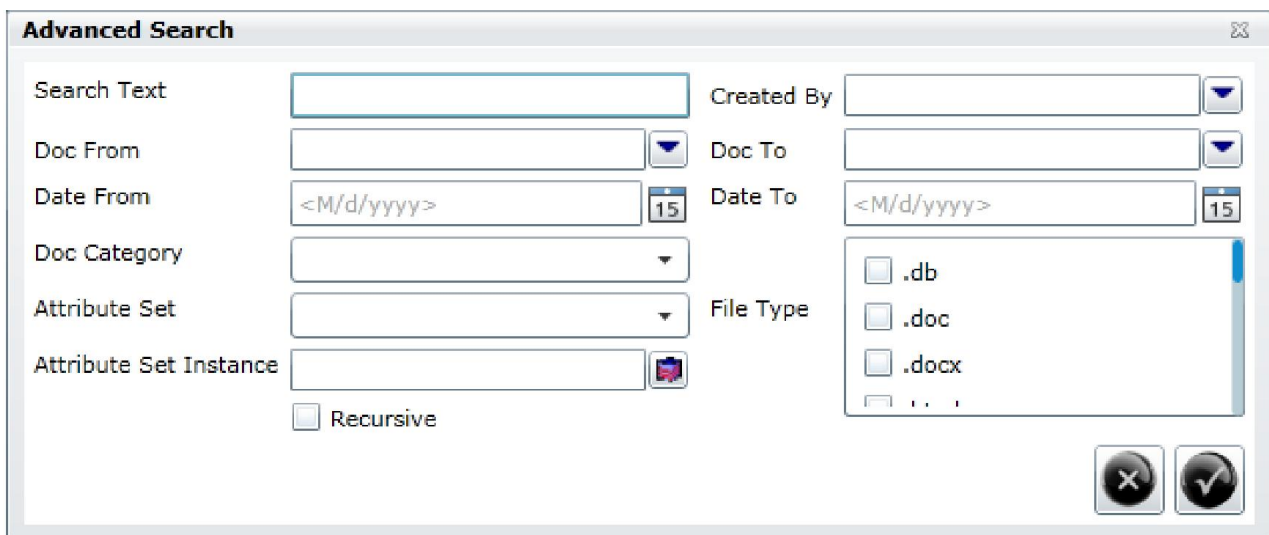
Document On Per Page 20 ▼

There is a search field given for searching the documents by name or the content in the document. All the words in a document will be indexed and stored in the system by a process to make the search easy for the user. If a user wants to search the documents by number then he/she should check the 'Document No' check box which is located near to the search field.



☐ Document No Search 🔍 🔄 📄

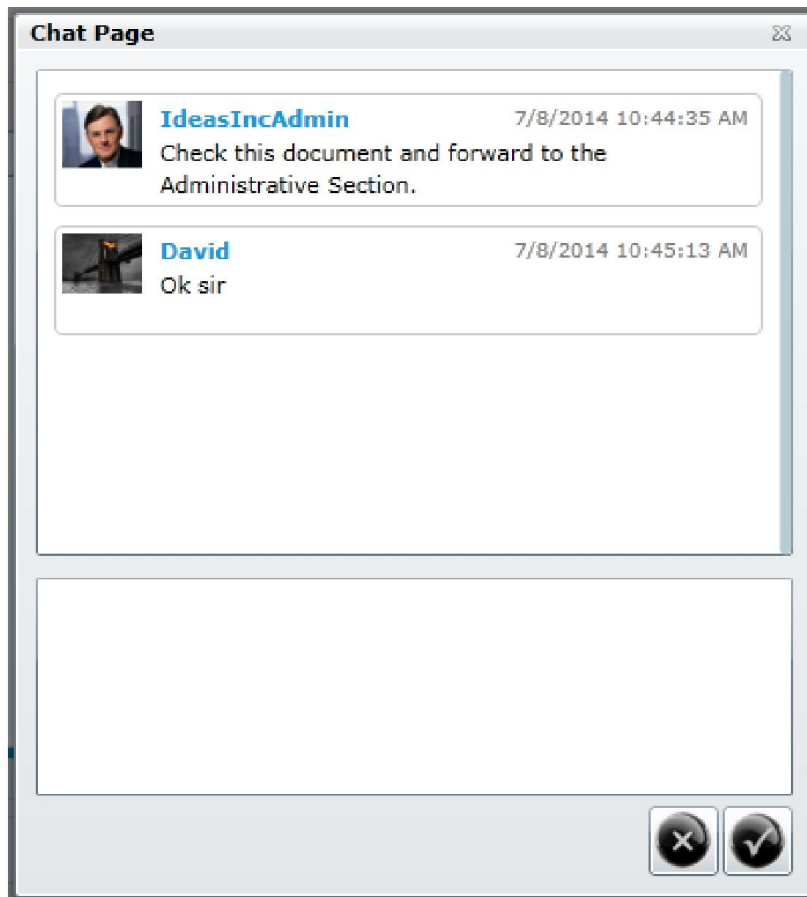
By selecting the 'Advance Search' options located next to the default search field, a user can search more specifically for a document.



Advanced Search

Search Text	<input type="text"/>	Created By	<input type="text"/>
Doc From	<input type="text"/>	Doc To	<input type="text"/>
Date From	<input type="text" value="<M/d/yyyy>"/>	Date To	<input type="text" value="<M/d/yyyy>"/>
Doc Category	<input type="text"/>	File Type	<input type="checkbox"/> .db
Attribute Set	<input type="text"/>		<input type="checkbox"/> .doc
Attribute Set Instance	<input type="text"/>		<input type="checkbox"/> .docx
	<input type="checkbox"/> Recursive		<input type="checkbox"/> . . .

Chat Window, located next to the Advance Search icon, gives the user to put a comment from his for any document and that can be view all the users who ever have the permission to view the document and also they can give their comments in the same chat window.



c) Version Panel

This is the panel located under the document panel which the more details of a document will be showed such as version id, version, document name, category, file type, size, created date, descriptions, keywords, etc.,



There is some functional icons given in this panel and they are for view workflow if any, toggle the view of the details, move between the versions, open the document, view the attachments/download and save the attachment respectively.

d) Action Panel

The Action panel is located in the right upper side of the DMS window. This panel contains lots of action button which we can user for different actions for a document. These actions will be discussed later in detail.

e) Attribute Set

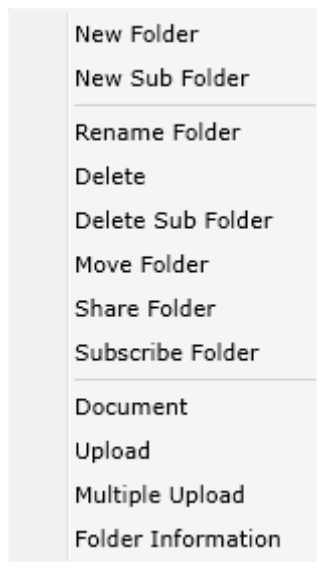
There is an Attribute set panel in the right bottom side of the DMS window after the action panel. To assign any attribute for a document we can do it from here but user should create both this attribute and the attribute set instance from Vienna Advantage application.

f) Document Link Panel

This panel is located in the right bottom side of the DMS window and this panel gives the information about the path of the selected document and the attachment details.

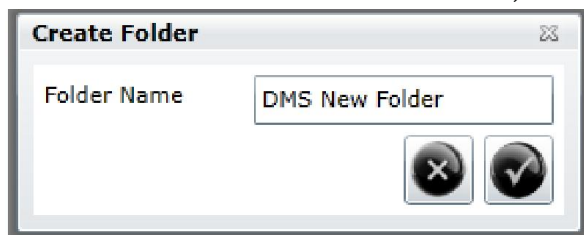
6. Folder Actions

On the right click of any folder, user can see the folder actions that can be do with any folder.



a) New Folder

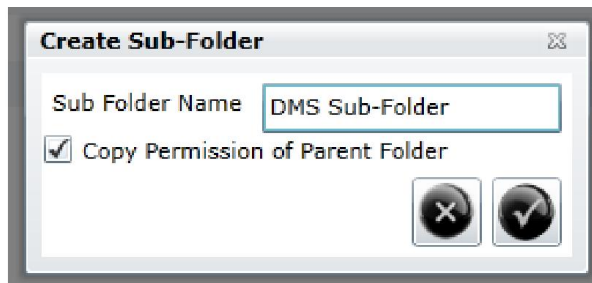
To create a new folder in the same level, click on the 'New Folder' and enter the name as user wants.



b) New Sub-Folder

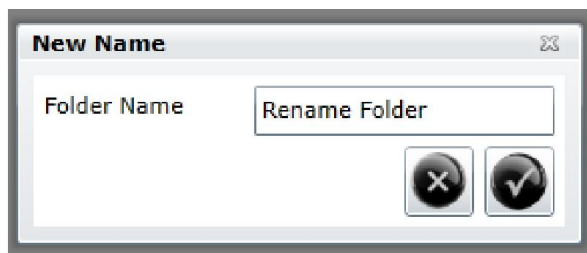
To create a new sub folder, right click on the folder where the user wants to create a new subfolder and click on the 'New Sub-Folder' menu. Then user needs to enter the new sub-folder name and click ok. A new sub-folder will be created in the folder.

If the user wants to copy the same permission of the parent folder, then he/she need to check the 'Copy Parent Folder Permission' before clicking the ok button. If this check box is true means all the users who have the permission for the parent folder, will get the same permission for the new subfolder else the user who created the subfolder only will get the permissions.



c) Rename a Folder

This is the option to rename a created folder. Here an owner (who created the folder) can only rename the folder. User need to right click and select the rename option and need to give the new name for the folder.



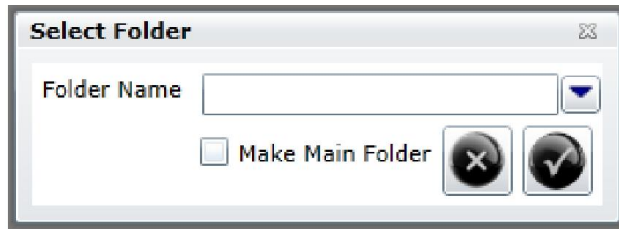
d) Delete Folder/Sub Folder

This is used to delete a folder of sub folder. This action can do only the owner of a user who has the permission to delete. Deleting a folder means deleting all the subfolders and its files in which this user have the permission to delete. If any user clicked on the delete menu, the pop up message will come to for the confirmation.

If the user selected the Delete Sub Folders menu then all the sub folders under that particular folder will be deleted.

e) Move Folder

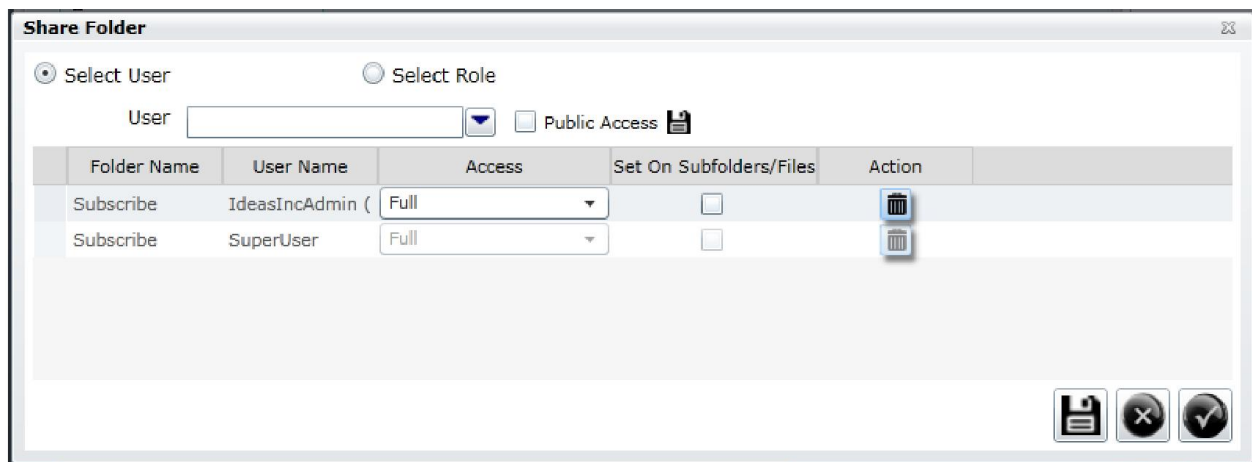
This is used to move one folder to another folder. This action can only do the users who have the minimum permission of 'Read/Write/Delete'. A public folder cannot be move into a non public folder but a non public folder can move in to a public folder.



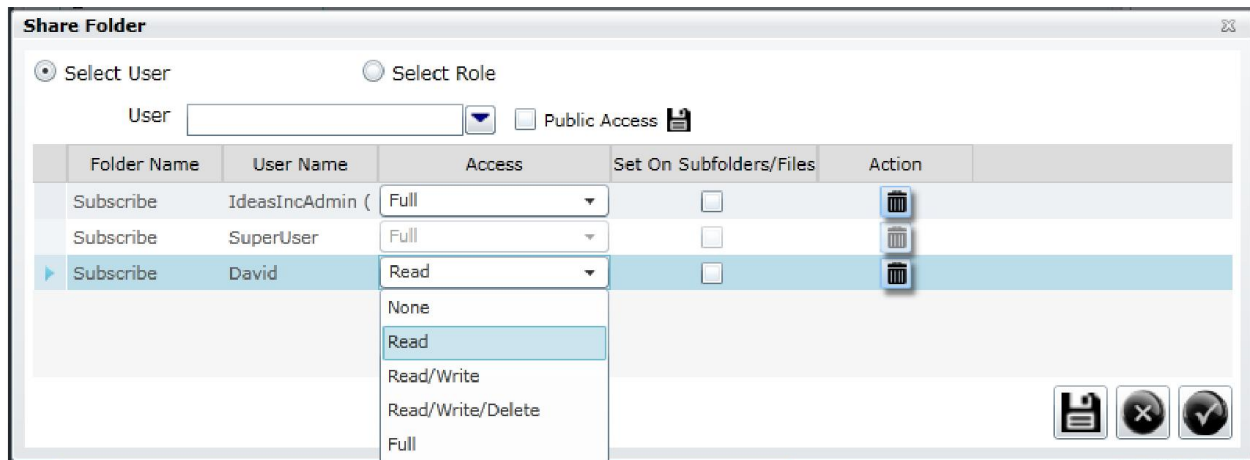
'Make Main Folder' option allows a sub folder to become a main folder/first level folder/parent folder.

f) Share Folder

If a user wants to share any folder between other users, he/she can use this action menu. This option will only display if the user has the full permission on the folder. Sharing can be done in user level, role level and public.



If the user wants to share any folder with other user, then he/she need to select the user radio button and need to enter the user name and click on the save button. After that the user should select the permission level for the user.



Same this action can be done with a role, mean a user can set permission to all users under a specific role.

If a user wants to set a folder as public then he/she needs to check the 'Public Access' check box.

g) Subscribe Folder

This is used to subscribe/unsubscribe a folder. Once a user subscribed a folder means, he will get notifications for the further actions of that particular folder such as rename, move, delete, upload, etc.

h) Document

This is the short cut to create a document directly to the selected folder.

i) Upload

This is the short cut to upload documents directly into the selected folder.

j) Multiple Upload

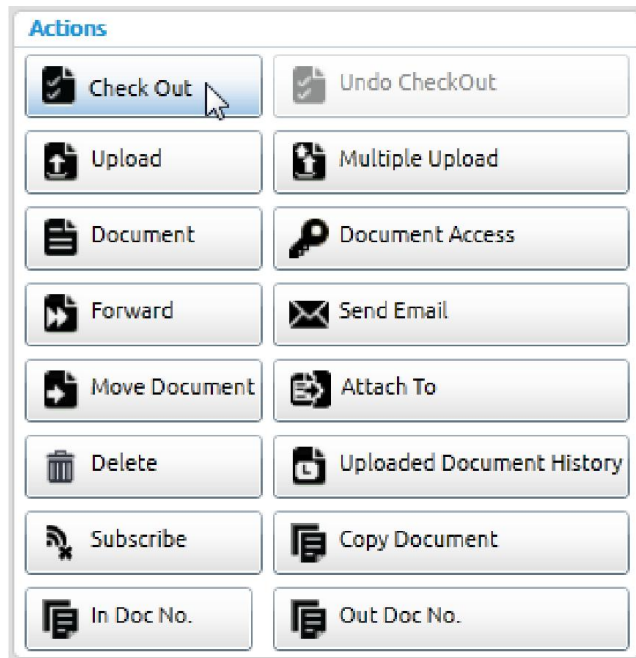
This is the short cut to upload multiple documents into the selected folder.

k) Folder Information

By this option user can view the folder information. This include owner name of the folder, folder Id & created date.

7. Exploring the Action Panel

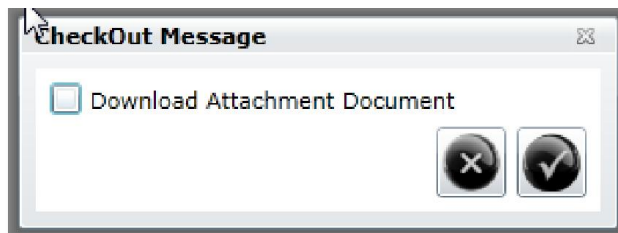
Action panel of DMS contains most of the functionalities.



a) Check out

Check out is the functionality, in which a locked (Checked In) document is unlocked to change or edit. When a document is checked out, then the 'Undo CheckOut' button also will be active which can be used to undo the checked out action.

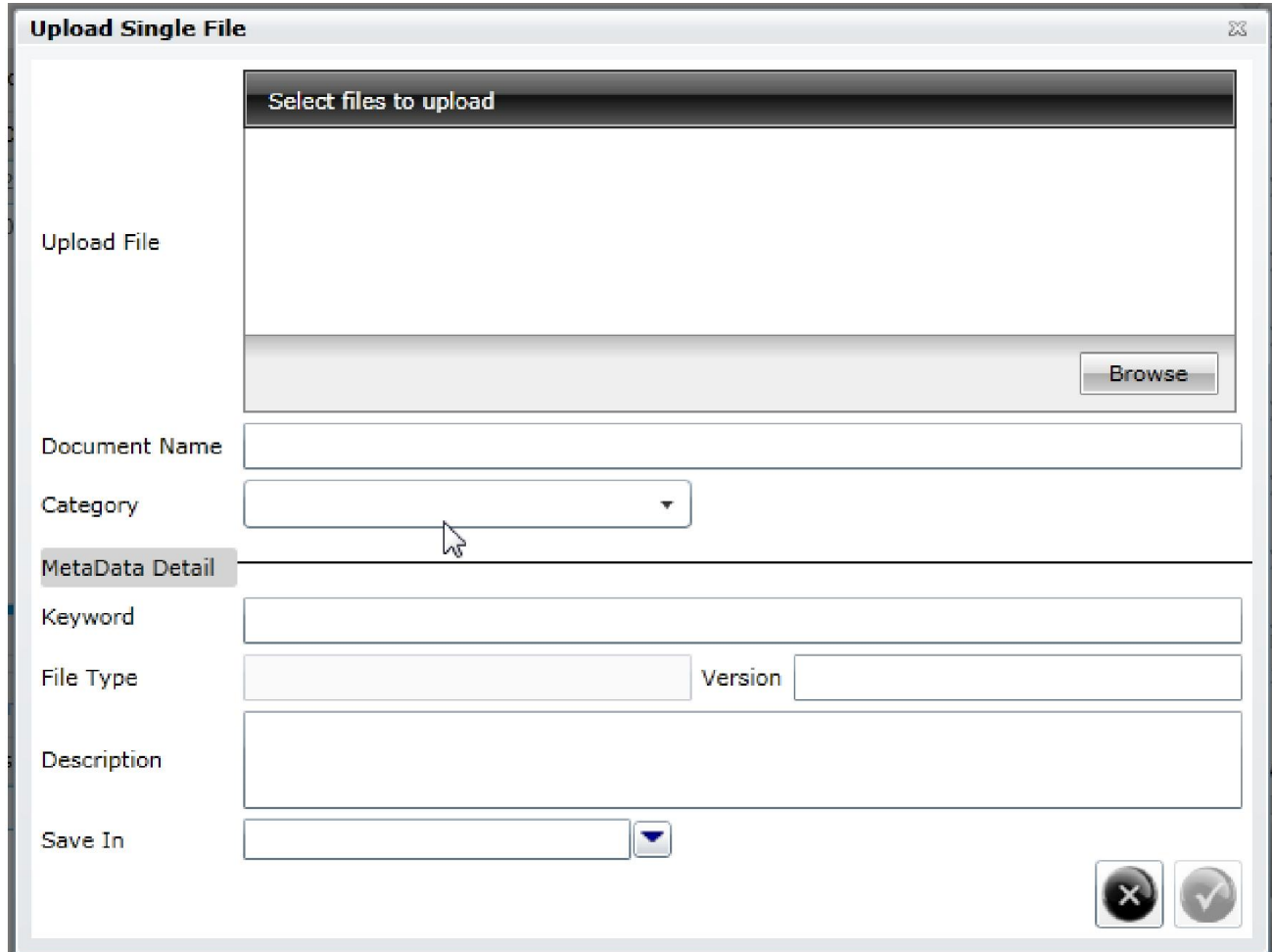
There is a option that a user can download the document directly to the computer along with check out action. For that a user need to check the 'Download Attachment Document' check box in the check out pop up message box.



After checked out, the icon with the document name will be change into a green color tick mark which means the document is checked out status. If a user wants to check in the same document then he/she should press the same button which he/she used for checkout. After a check out, the button name will be changed as 'Check In'

b) Upload document

This button is used to upload a document into the DMS system.

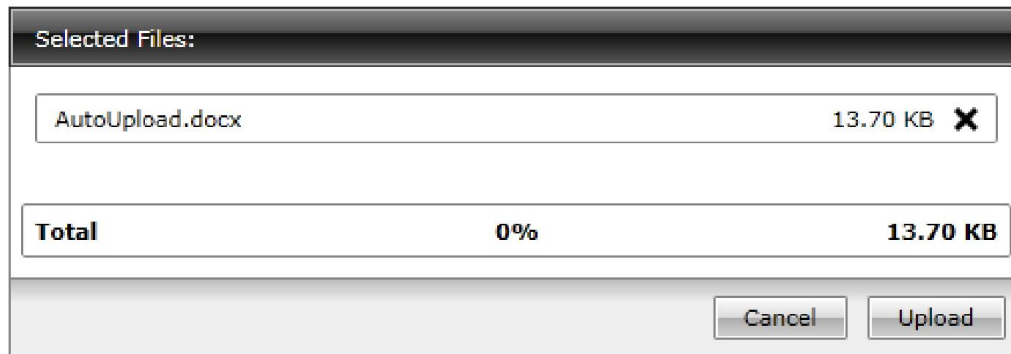


The screenshot shows a window titled "Upload Single File" with a close button in the top right corner. The window is divided into two main sections. The top section, labeled "Upload File", contains a large area with the text "Select files to upload" and a "Browse" button at the bottom right. The bottom section, labeled "MetaData Detail", contains several input fields: "Document Name" (a text box), "Category" (a dropdown menu with a mouse cursor over it), "Keyword" (a text box), "File Type" (a text box) and "Version" (a text box) side-by-side, "Description" (a large text area), and "Save In" (a text box with a folder icon). At the bottom right of the window are two circular buttons: one with a close symbol (X) and one with a checkmark symbol.

User can browse the document which he/she want to upload and can give a name in the Document Name field. User can select the category from the document list for this document. The Metadata Detail section contains the more specific details of the document which contains the keyword, version, description and save in folder name.

Most important is the save in folder name. Here a user should select at which folder he /she want to save this document. If the user put any version then that version number will be assigned if not then default 1.0 version number will be assigned for that document.

After all this settings, the user needs to click on the upload button to upload the document.



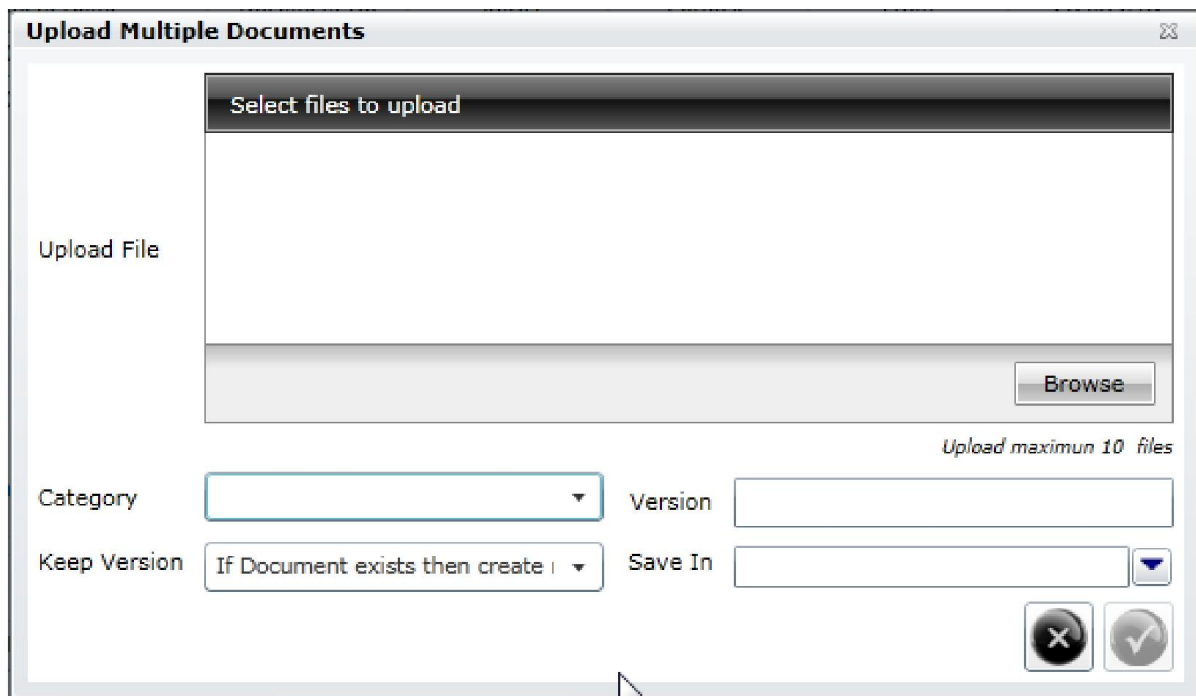
A dialog box titled "Selected Files:" showing a list of files. The first file is "AutoUpload.docx" with a size of "13.70 KB" and a close icon. Below the list, a summary row shows "Total" as "0%" and "13.70 KB". At the bottom right are "Cancel" and "Upload" buttons.

Selected Files:		
AutoUpload.docx	13.70 KB	X
Total	0%	13.70 KB
		Cancel Upload

The document will be uploaded in the system and the indexing will be start automatically.

c) Upload multiple documents

This is similar like the upload functionality but using this we can upload multiple documents (but maximum 10 at a time).



A dialog box titled "Upload Multiple Documents" with a close icon. It contains a "Select files to upload" section with a "Browse" button. Below this is a "Category" dropdown, a "Version" text field, a "Keep Version" dropdown (set to "If Document exists then create"), and a "Save In" dropdown. A note "Upload maximum 10 files" is present. At the bottom right are "X" and "checkmark" buttons.

Upload File

Select files to upload

Browse

Upload maximum 10 files

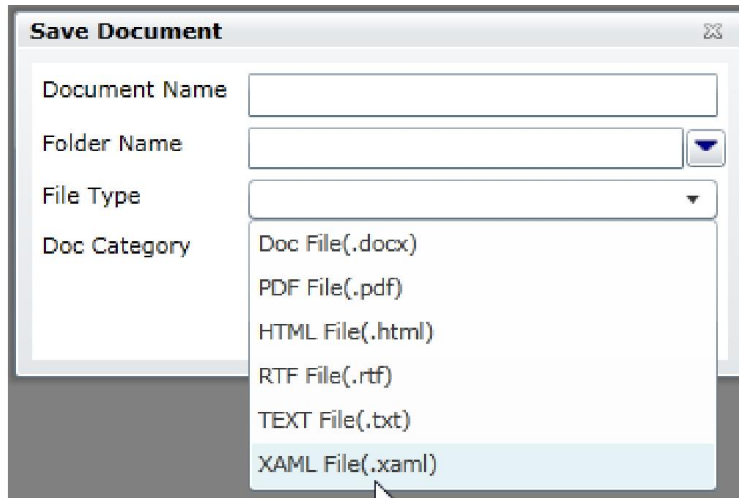
Category: [dropdown] Version: [text field]

Keep Version: [If Document exists then create | dropdown] Save In: [dropdown]




X checkmark

d) Create Document

Using this option, a user can create a document directly to the DMS. User can select the document type as doc, pdf, txt, html and xaml.

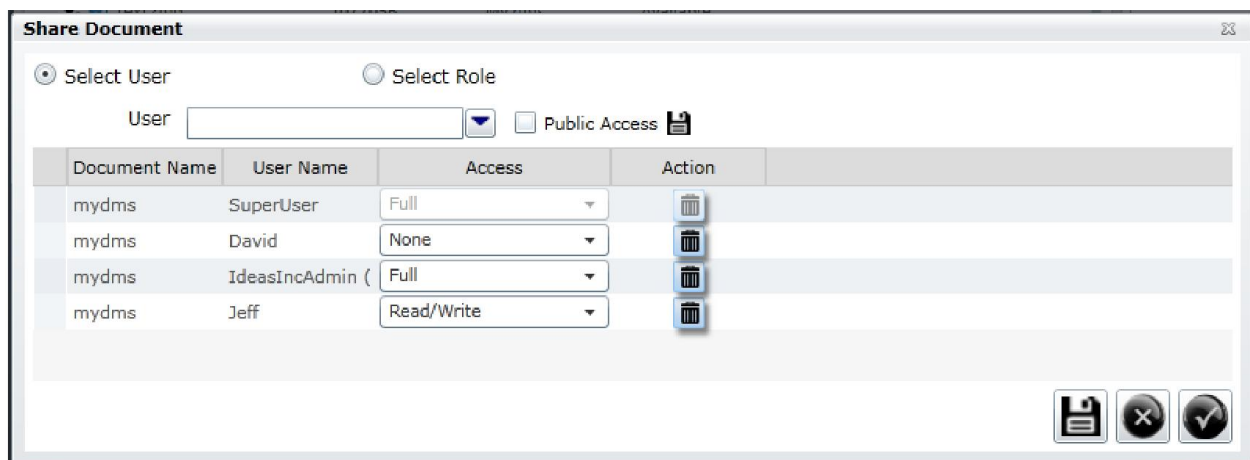


The 'Save Document' dialog box contains the following fields and options:



- Document Name:
- Folder Name: 
- File Type: 
- Doc Category:
 - Doc File(.docx)
 - PDF File(.pdf)
 - HTML File(.html)
 - RTF File(.rtf)
 - TEXT File(.txt)
 - XAML File(.xaml) 





e) Document Access




This action is used to give the permissions to different users for a particular document. After clicking this button, the following screen will be showed same like as folder share.



The 'Share Document' dialog box contains the following elements:

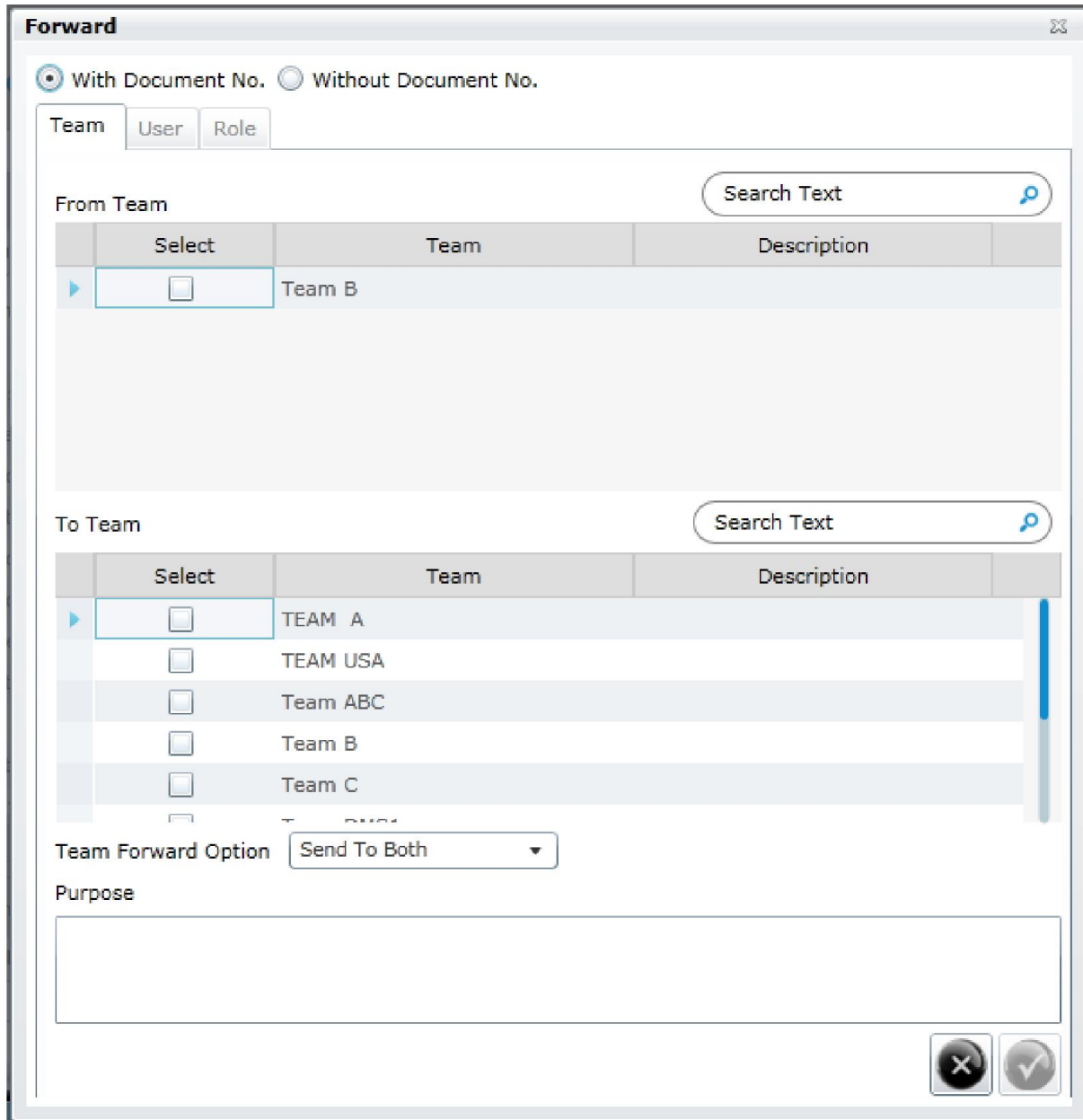
- ☒ Select User ☐ Select Role
- User:  ☐ Public Access 
- Table with 5 columns: Document Name, User Name, Access, Action, and an empty column.

Document Name	User Name	Access	Action	
mydms	SuperUser	Full		
mydms	David	None		
mydms	IdeasIncAdmin (Full		
mydms	Jeff	Read/Write		

At the bottom right, there are three icons: , , and .

Here a user can give permission in two levels, user level and role level. User needs to select a user or a role to which he want to give the permission and need to select the level of permission he want same like the folder permissions as we discussed earlier.

f) Forward



Forward

☒ With Document No. ☐ Without Document No.

Team User Role

From Team

Select	Team	Description
<input type="checkbox"/>	Team B	

To Team

Select	Team	Description
<input type="checkbox"/>	TEAM A	
<input type="checkbox"/>	TEAM USA	
<input type="checkbox"/>	Team ABC	
<input type="checkbox"/>	Team B	
<input type="checkbox"/>	Team C	

Team Forward Option

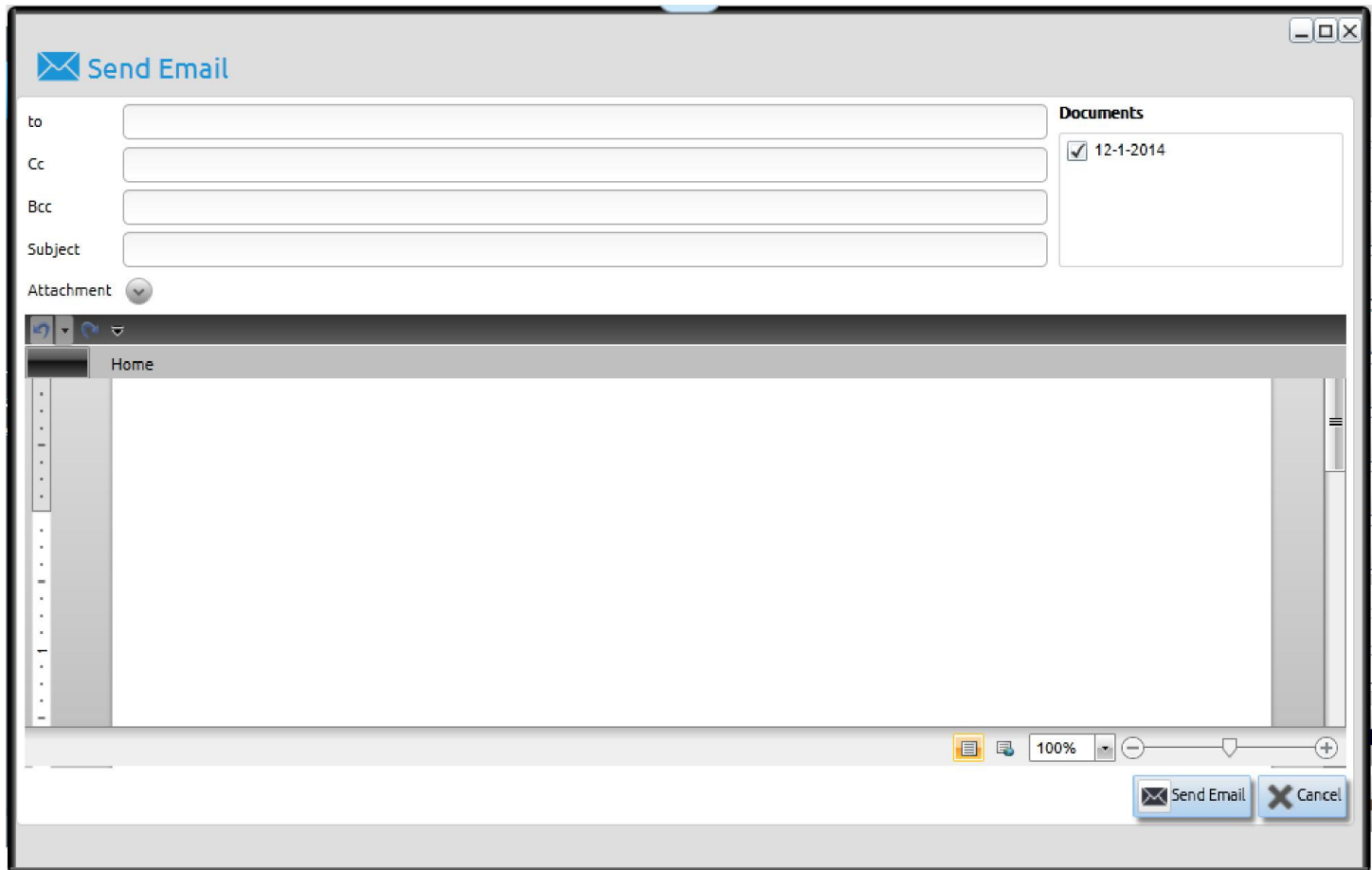
Purpose

This action is used to forward a document to a specific team, user or a role. Here the user can have two options for forwarding with document number and without document number.

If the user selected the 'With Documents Number' then he/she can only send with to specific team. The user needs to select 'from team' and 'to team' while forwarding because system will create the In/Out document number according the team format given in the system.

If the user doesn't want to create an In/Out Document then he/she can use the 'Without Document Number' option and he/she should select a team, role or user to forward.

g) Send mail



The screenshot shows a 'Send Email' dialog box with the following fields: 'to', 'Cc', 'Bcc', and 'Subject'. There is an 'Attachment' dropdown menu. On the right, under the 'Documents' section, there is a checkbox labeled '12-1-2014' which is checked. Below the fields is a large empty text area. At the bottom right, there are 'Send Email' and 'Cancel' buttons. The dialog box has a standard Windows-style title bar and window controls.

This option is used to send mail directly from the DMS system.

h) Move Document

This option is used to move a specific document from one folder to another folder. User need to select the folder to where he/she want to move the document.

i) Attach to

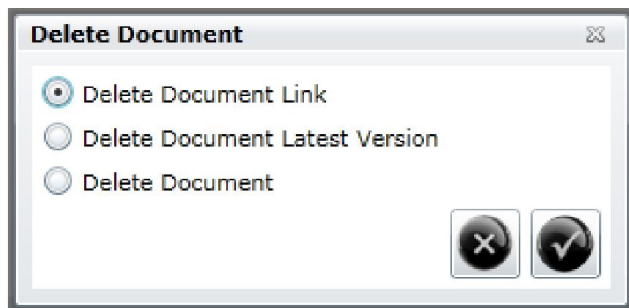
This is used to attach any document with a specific record in the Vienna Advantage. For example, if a user has his medical certificate in DMS and he/she wants to attach this with his leave applications then he/she can use this button.

The user need to first select the document (E.g.:- Medical Certificate) and click in the 'Attach To' button. Then he/she need to select any record from any window (Eg:- Employee Leave) and need to click on the 'AttachDocumentFrom' button from the document section of the left menu panel. Now the document is attached with the record.

User can see if any document is attached with any record or not by seeing under the related document link at the Document Link Panel of the DMS located in the right bottom side of the DMS. User can directly zoom the record from the same place to see which record is attached with the selected document.

j) Delete

This is the option to delete the documents uploaded in the system. A user can only delete any document if he/she has the permission to delete the document.

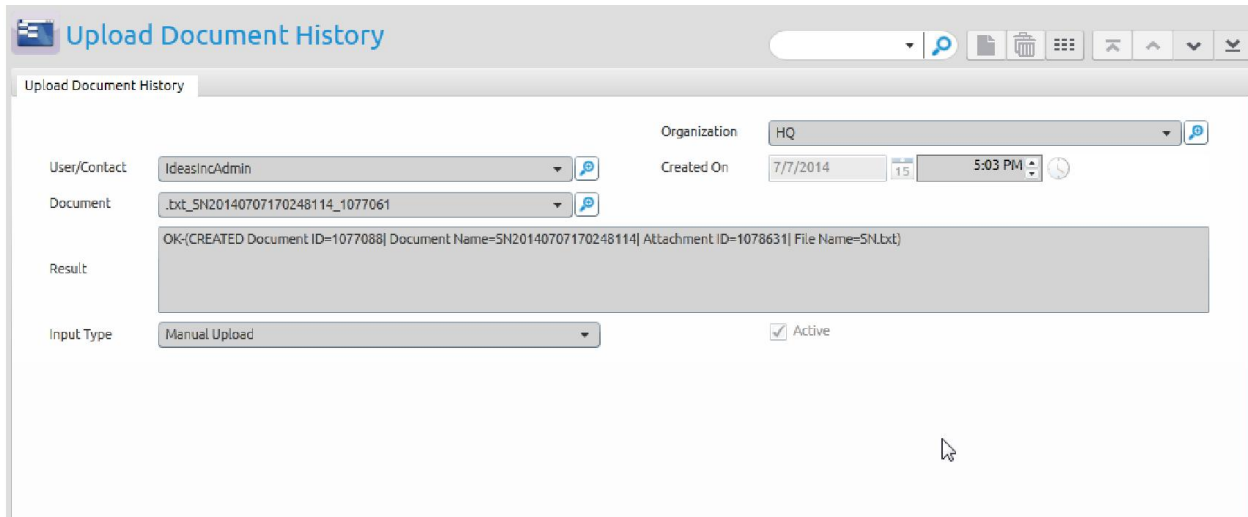


While delete, the user have the 3 options:

1. Delete document link
To delete the attached link
2. Delete Document Latest Version
To delete the latest version of the documents
3. Delete Document
To delete the entire document

k) Upload document History

This is used to view the uploaded history of the document. A new window will be open and user can see the uploaded details for that document.

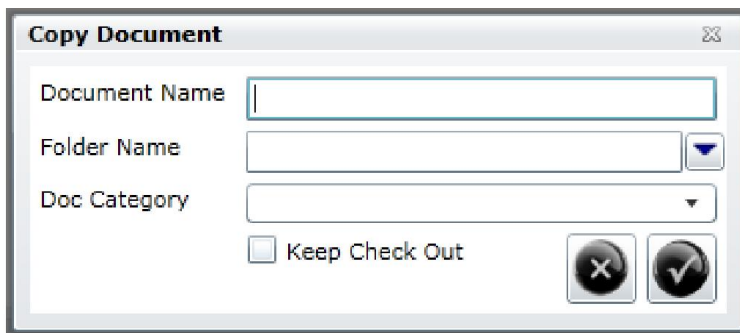


l) Subscribe

This is used to subscribe a document which means after subscribe the owner of the document will get notifications for every change on the document. User can use same button for both subscribe and unsubscribe. Once the document is subscribed then the button automatically will be changed to unsubscribe.

m) Copy Documents

This is used to copy a document from one folder to another folder.



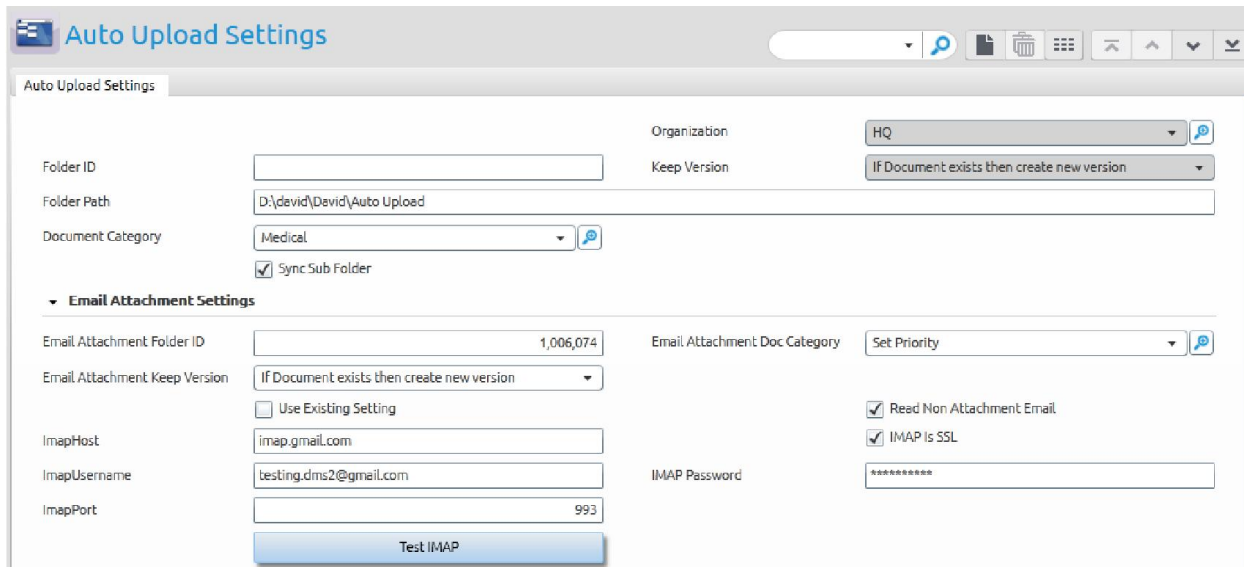
User need to enter a new name for the new document and need to select a folder at where the document should be copy. User can also select the document category. Keep check out check box keeps the new copied document in the checked out status if the check box is true.

n) In Doc No and Out Doc No

This is used to create in/out document number manually for a specific document. System will automatically create this in/out document if the user forwards this document to a team with 'With Document Number' option. In another hand if a user want to send a document to an another user with in/out document number, then he/she need to click this button as needed and forward document 'Without Document Number' option and need to select any user or role.

8. Auto Upload documents in to the DMS System

There is an option in the system that a user can upload large number of document into the system by auto upload settings. If a user has a bulk number documents saved in the system then he/she can use the auto upload setting window to upload the documents. User need to put the path of the files and need to put the folder id where he/she want to upload the files.



The screenshot shows the 'Auto Upload Settings' window. It contains the following fields and options:

- Folder ID:** A text input field.
- Folder Path:** A text input field containing 'D:\dev\David\Auto Upload'.
- Document Category:** A dropdown menu set to 'Medical'.
- Organization:** A dropdown menu set to 'HQ'.
- Keep Version:** A dropdown menu set to 'If Document exists then create new version'.
- Sync Sub Folder:** A checked checkbox.
- Email Attachment Settings:**
 - Email Attachment Folder ID:** A text input field containing '1,006,074'.
 - Email Attachment Doc Category:** A dropdown menu set to 'Set Priority'.
 - Email Attachment Keep Version:** A dropdown menu set to 'If Document exists then create new version'.
 - Use Existing Setting:** An unchecked checkbox.
 - Read Non Attachment Email:** A checked checkbox.
 - IMAP Is SSL:** A checked checkbox.
 - ImapHost:** A text input field containing 'imap.gmail.com'.
 - ImapUsername:** A text input field containing 'testing.dms2@gmail.com'.
 - ImapPort:** A text input field containing '993'.
 - IMAP Password:** A text input field with masked characters (asterisks).
 - Test IMAP:** A button.

There is check box 'Sync Sub Folder' which should be true if the user wants to upload all the subfolder documents also into the system. That means if this check box is not true, then the only documents in the folder that the user specified in the path will be uploaded.

DMS system will not allow the same file names in a folder. There is a chance to happen this while auto upload. To avoid this DMS system has a 'Keep Version' functionality in which a user can select the action what system should do if a same file name is found. If the 'Sync Sub Folder' then keep version field will be disabled else it has 3 options,

- If document exists then return : This option will return that document without uploading if the system finds a document with same name and type in the same folder.
- If document exist then create new document: If any duplicate found then System will upload it and append the date and time with its name. This option will create 'Uploaded Completed Documents'

and 'Uploaded Failed Document' folder and will copy complete document and failed documents in to the corresponding folders.

- If Document exists then Create New Version: In this option the system will create a new version of the document if it found as present already.

Auto uploading can do through email also. This will upload all the email attachments to DMS. Attachment name will be the document name and body of the email will be the description.

Once a document is uploaded to DMS through email then again it cannot be uploaded to DMS in any folder using email. One user can upload a document from email only once.

There is also an option to upload non-attachment email. Check the "Read non attachment email" checkbox. This will upload all non-attachment email. For non attachment email subject of the email will be document name and text in the body of the email become document with .txt extension.

Before this document upload process from email user has to do IMAP setting. There is email setting window where user can do IMAP setting or user can also do IMAP setting in the auto upload window. There is "User Existing Setting" checkbox and if the user checked true this then it picks the IMAP setting from "Email Setting" window else from same (auto upload) window.

In Email Settings window, for IMAP settings, user has to fill email address (email from where he/she wants to upload documents), password of the email, IMAP host and IMAP port number and save.

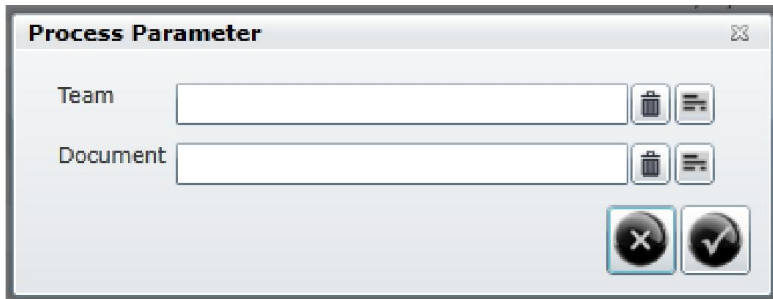
If user left uncheck the "use existing setting" checkbox then he/she have to do the settings in the same window. There is also a test button named as "Test IMAP". If all detail related to email are correct and you click on "Test IMAP" button then it shows authenticated message else it give error message for wrong credential.

For duplicate document keep version option is working same as from document from server. For create new document option it create folder "DMS Read Document" and move all document from Inbox to this folder.

System provides filter functionality for both processes in auto upload. System uses a filter on the basis of document extensions. The extension we enter in the filter only that types of document will be uploaded to DMS rest of all will not be uploaded.

9. In/Out Document Reports

If the user wants to check the system created in/out documents number, then he/she can use the In/Out Document Report. There are two report named In Document Report and Out Document report which will show in and out numbered documents respectively as report.



The image shows a 'Process Parameter' dialog box with a title bar containing a close button. It features two text input fields: 'Team' and 'Document'. Each field has a trash icon and a list icon to its right. At the bottom right, there are two circular buttons: one with an 'X' and one with a checkmark.

This report contains two parameters like team and document. If the user selects any team, then the report will show the all in/out documents created for that team. Also user can select the specific document so that the report will show the in/out document numbers generated respectively.