**USER MANUAL ON DOCUMENT MANAGEMENT SYSTEM (Online Monitoring online data archival system in DoR)**

**Contract No: DORHMISICT/337310113/078/79/13**

# USER MANUAL-ADMIN SECTION

**SUBMITTED TO:**

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Planning and Monitoring Branch
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May, 2023

## Table of Contents

# 1. Document Management System (DMS) User Manual

## 1.1 Regarding this document

This User manual will provide all the basic knowledge regarding Document Management System. This manual will help you to navigate through the system.

# 2. Login

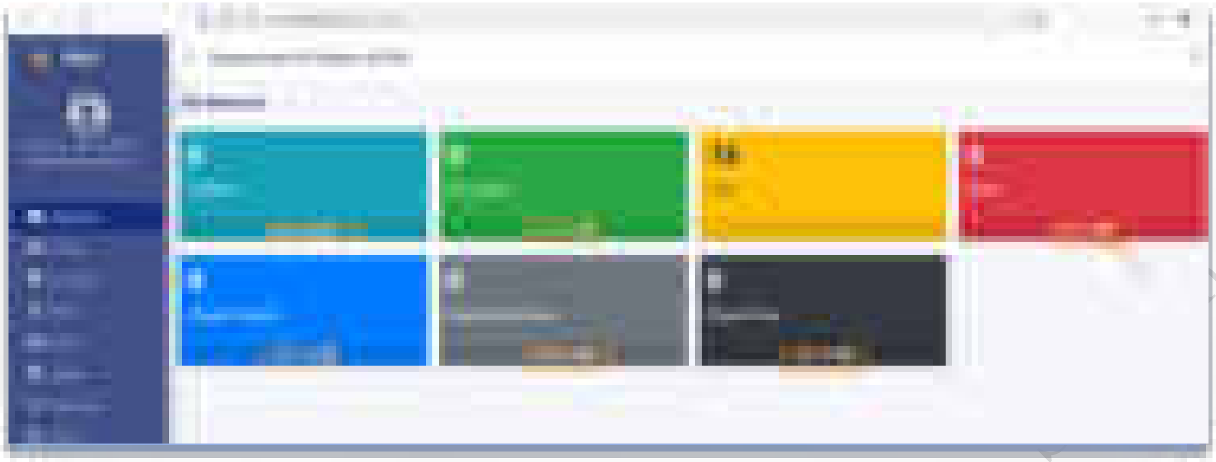
## 2.1 How to Login in DMS Admin Portal?

Step 1: First of all, enter https://dms.dor.gov.np/admin/login URL in Google Chrome or Firefox or Internet Explorer.

Step 2: Login page of DMS portal will be displayed, enter valid email address and password.

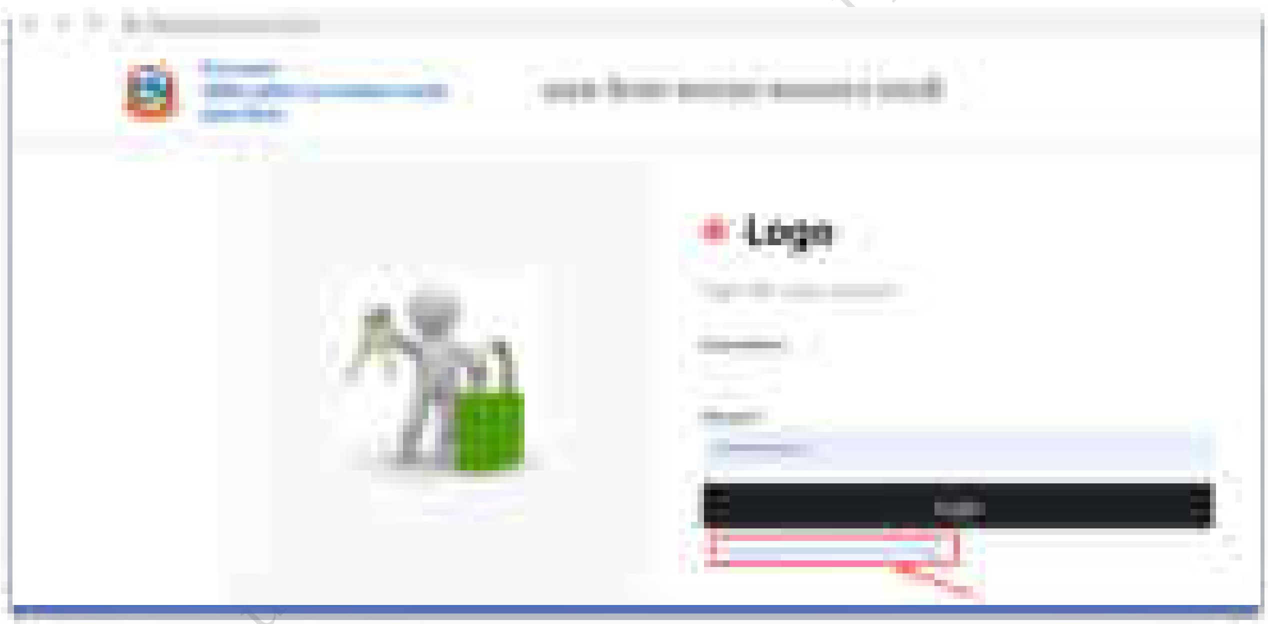
Step 3: User can Login into DMS portal clicking into "**Login**" button.

User should be able to login into the system and dashboard will be displayed.



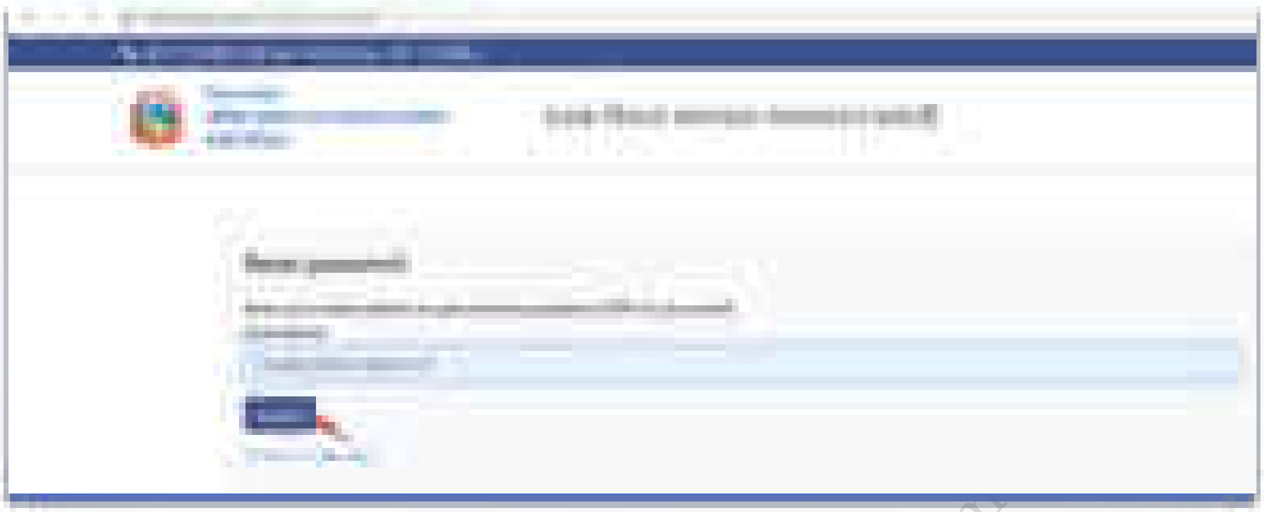
2.2 How to Reset Password in DMS Admin Portal?

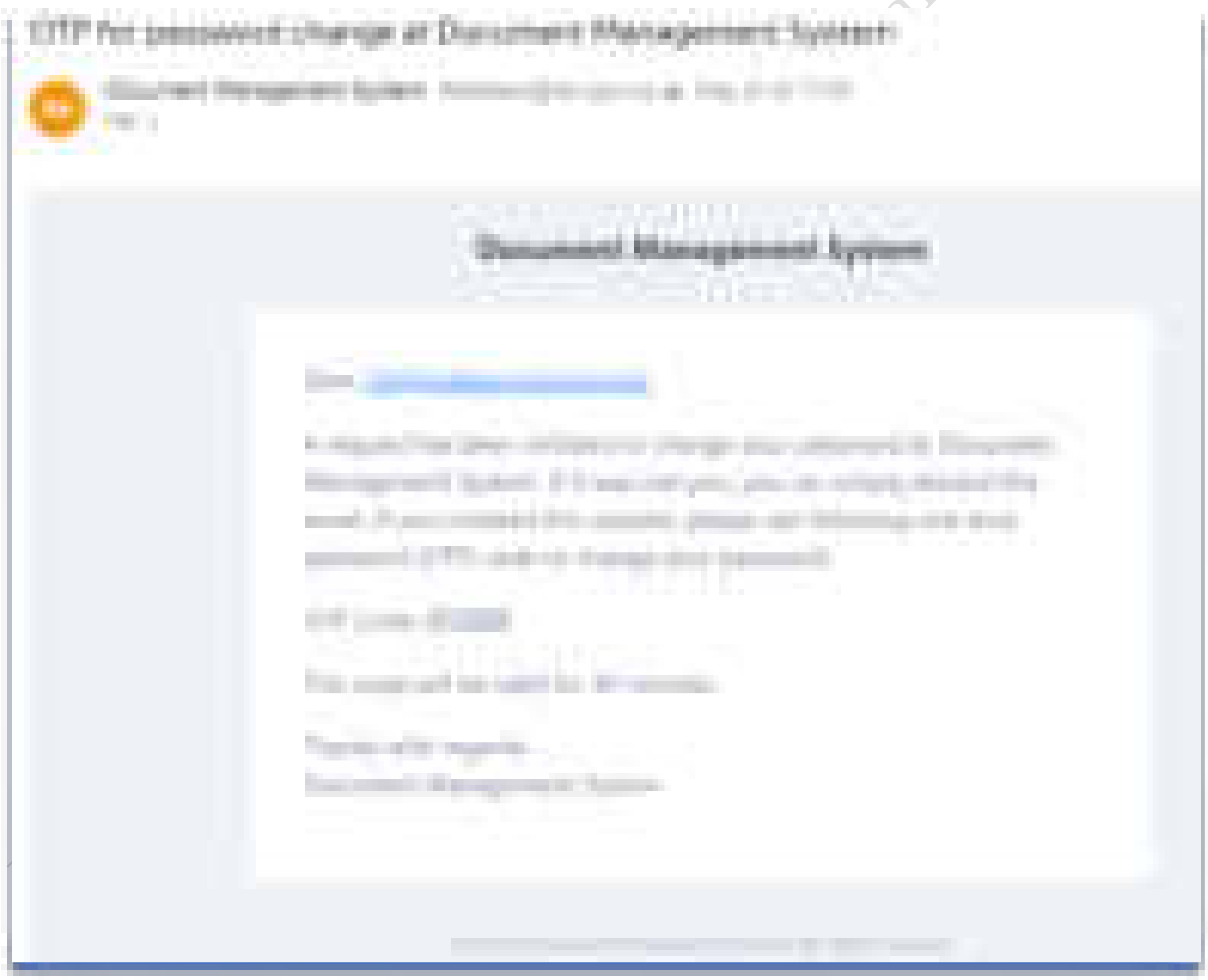
Step 1: First of all, enter https://dms.dor.gov.np/admin/login URL in Google Chrome or Firefox or Internet Explorer.



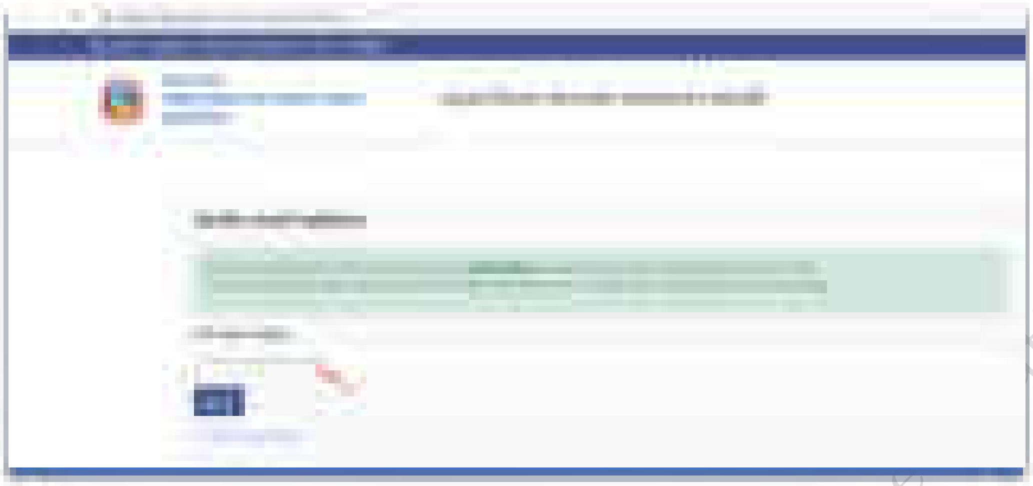

Step 2: Login page of DMS portal will be displayed, click on either "**Forget Password**" or "**Click here to reset**" for resetting the password.

Step 3: A new form will be displayed, Enter the valid email address and click on "**Submit**" button. After submitting the form check your email address to get the One Time Password (OTP).

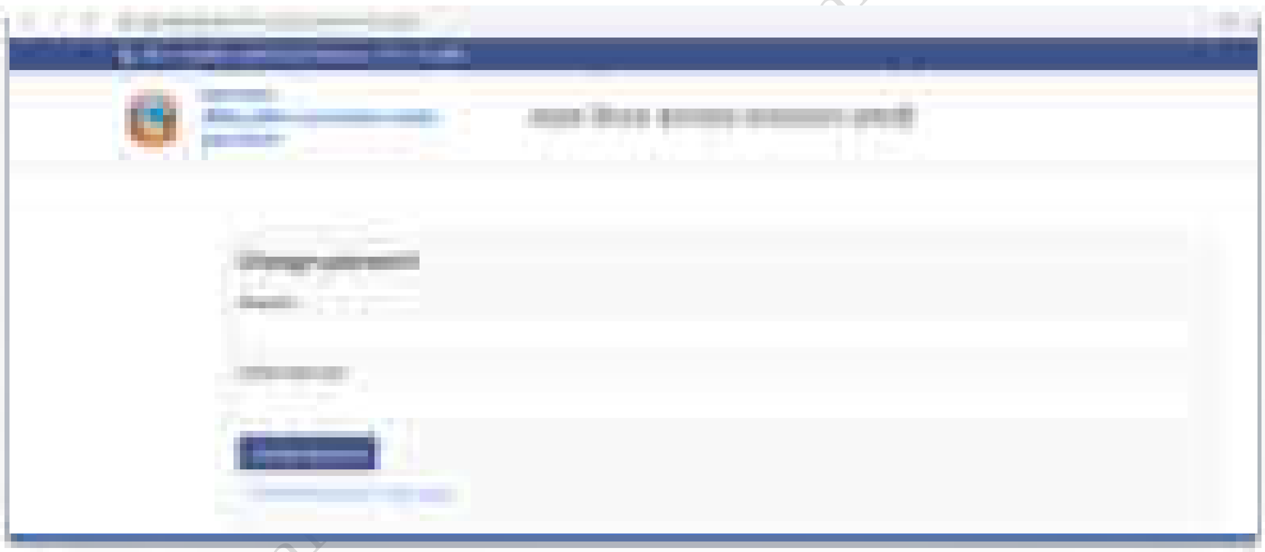


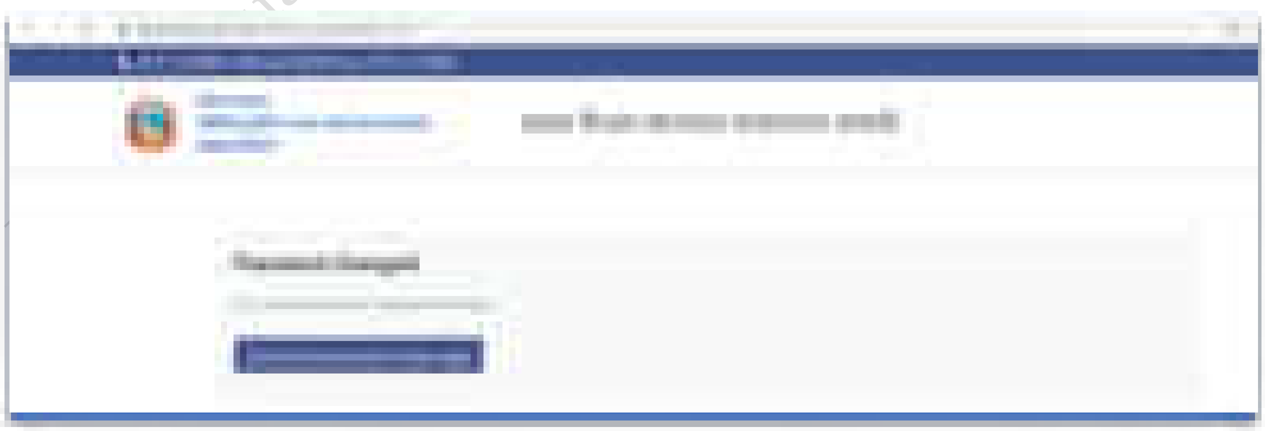


Step 4: Enter the valid OTP received in your email and click on "**Verify**" button. Then it will redirect to the reset password form.



Step 5: Enter the password and Confirm Password to change the password and click on “**Change Password**” button. Then password Changed successful message will be displayed click on “**Click here to go back to login page**”.



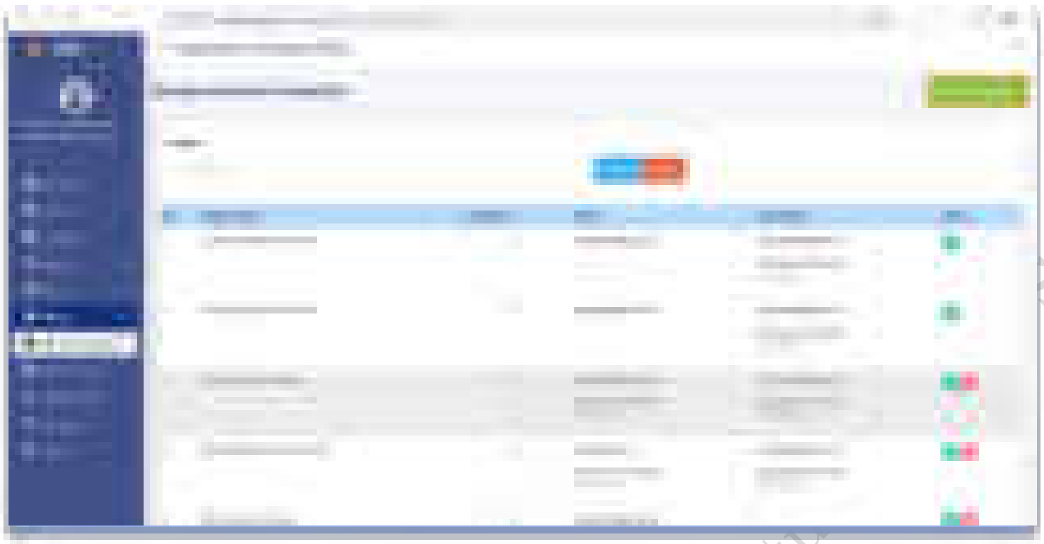


Step 6: Follow the procedure of **How to Login in DMS Admin Portal?**

# 3. Settings

## 3.1 How to Add Document Category?

Step 1: Click on “**Add Category”** button from top right side of the page to add document category.



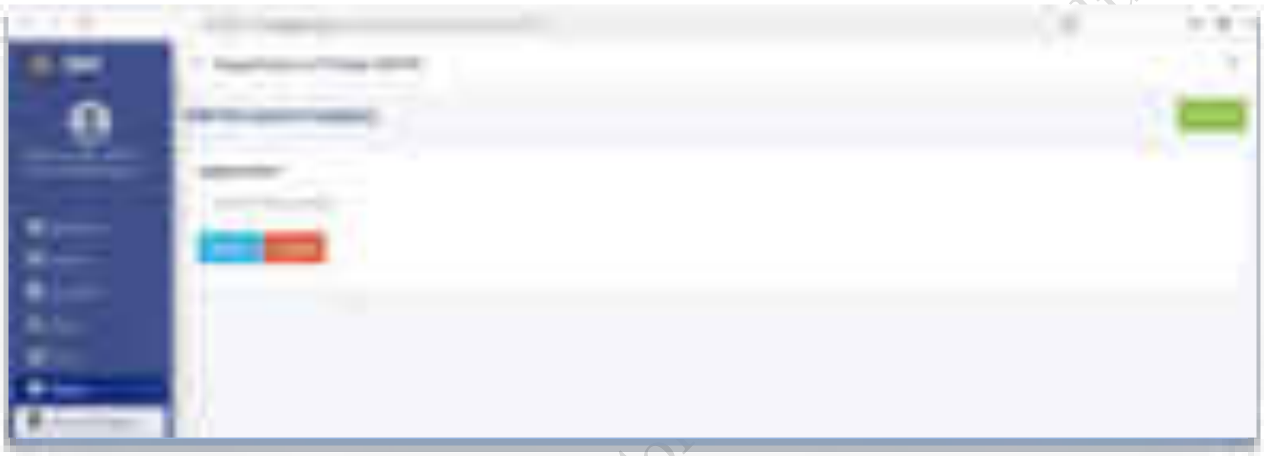
Step 2: Enter all required values in the given fields and click on “**Submit”** button.

User can publish or unpublish the Document Category by clicking on Published section of the list page of Document Category. The tick icon represent the published and cross icon represent the unpublished.

## 3.2 How to Edit Document Category?

Step 1: On the list page of Document Category “**Edit”** and “**Delete”** action button is available. Click on “**Edit”** action button so that Document Category details can be edited.

Step 2: Enter all required values in the given fields and click on “**Submit”** button.

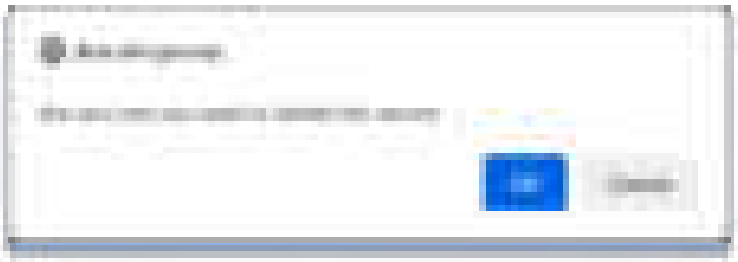


User can publish or unpublish the Document Category by clicking on Published section of the list page of Document Category. The tick icon represent the published and cross icon represent the unpublished.

### 3.3 How to Delete Document Category?

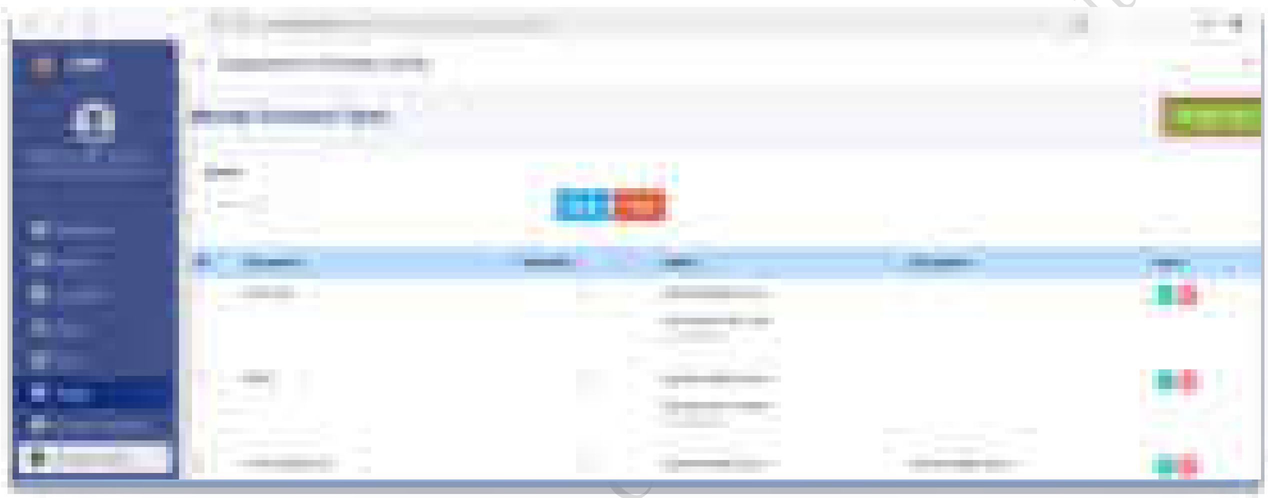
Step 1: On the list page of Document Category “**Edit”** and “**Delete”** action button are available. Click on “**Delete”** action button so that wrong Document Category can be deleted.

Step 2: Are you sure you want to delete this record? Question pop-up is displayed with “**OK”** and “**Cancel”** button. Click on “**OK”** button to delete the Document Category details.

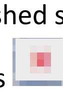


3.4 How to Add Document Type?

Step 1: Click on “**Add Type”** button from top right side of the page to add document type.

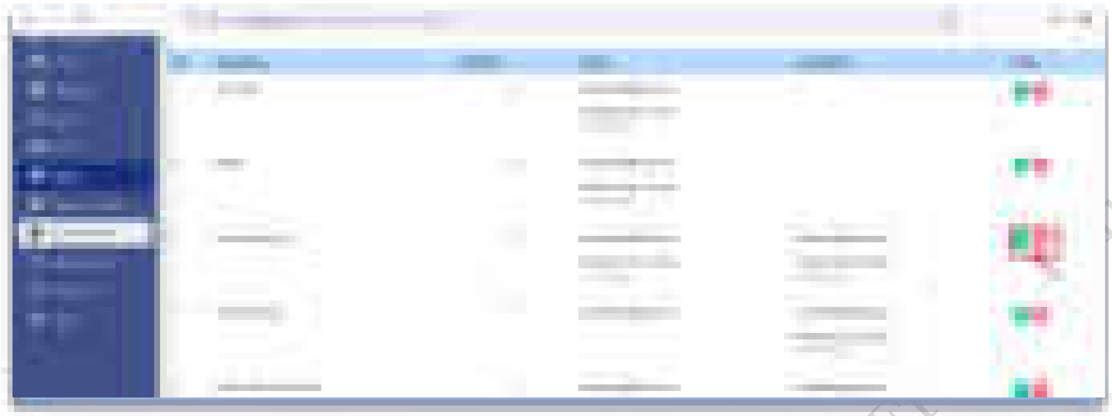


Step 2: Enter all required values in the given fields and click on “**Submit”** button.

User can publish or unpublish the Document Type by clicking on Published section of the list page of Document Type. The tick icon  represent the published and cross  icon represent the unpublished.

### 3.5 How to Edit Document Type?

Step 1: On the list page of Document Type “**Edit”** and “**Delete”** action button is available. Click on “**Edit”** action button so that Document Type details can be edited.

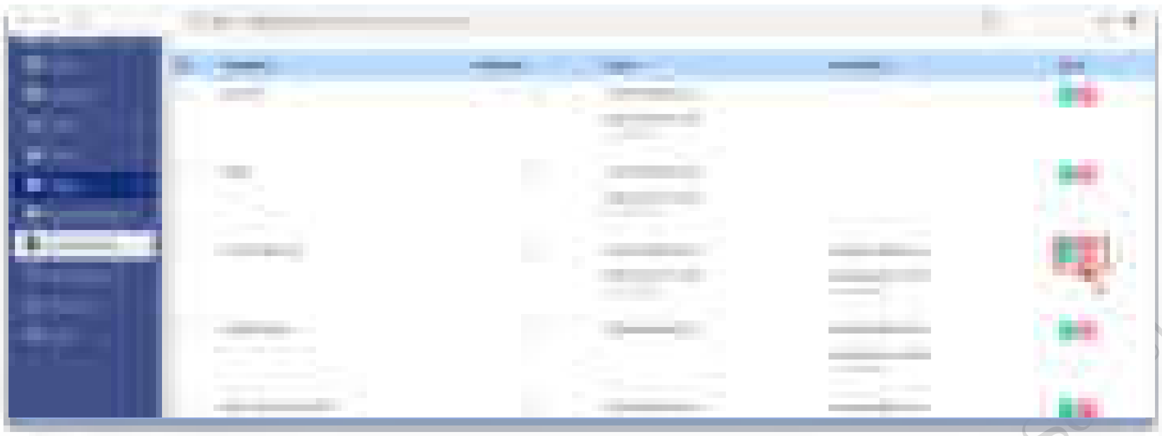


Step 2: Enter all required values in the given fields and click on “**Submit”** button.

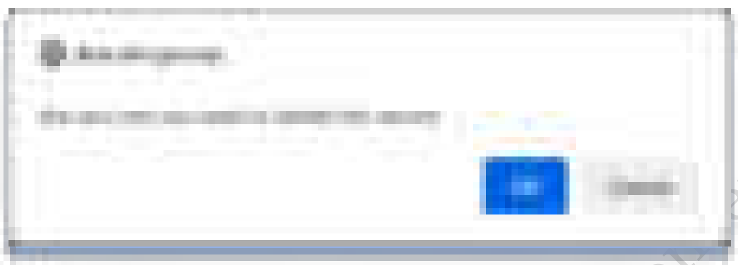
User can publish or unpublish the Document Type by clicking on Published section of the list page of Document Type. The tick icon represent the published and cross icon represent the unpublished.

### 3.6 How to Delete Document Type?

Step 1: On the list page of Document Type “**Edit”** and “**Delete”** action button is available. Click on “**Delete”** action button so that wrong Document Type can be deleted.



Step 2: Are you sure you want to delete this record? Question pop-up is displayed with “**OK”** and “**Cancel”** button. Click on “**OK”** button to delete the Document Category details.



3.7 How to Add Funding Agencies?

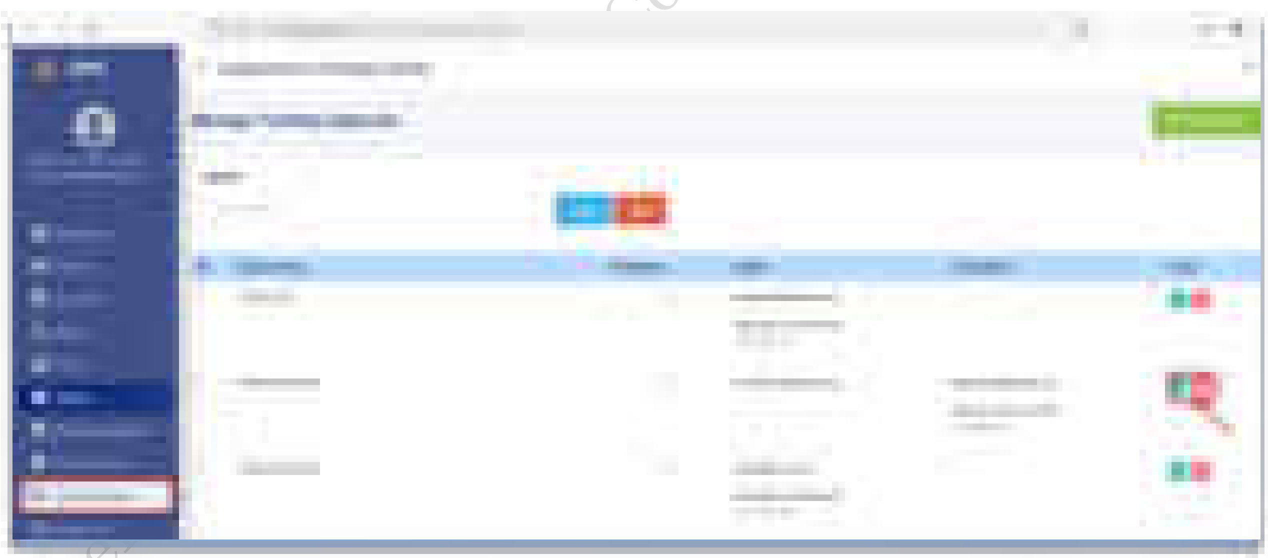
Step 1: Click on “**Add Agency”** button from top right side of the page to add funding agencies.

Step 2: Enter all required values in the given fields and click on “**Submit”** button.

User can publish or unpublish the Funding Agency by clicking on Published section of the list page of Funding Agency. The tick icon represent the published and cross icon represent the unpublished.

### 3.8 How to Edit Funding Agency?

Step 1: On the list page of Funding Agency "**Edit"** and "**Delete"** action button is available. Click on "**Edit"** action button so that Funding Agency details can be edited.

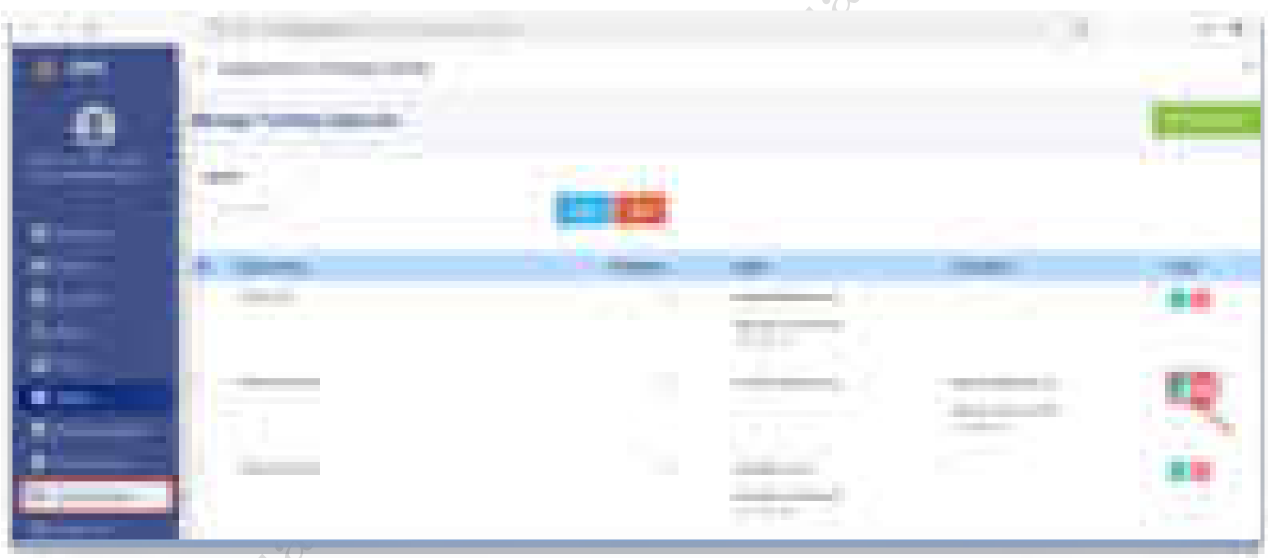


Step 2: Enter all required values in the given fields and click on "**Submit"** button.

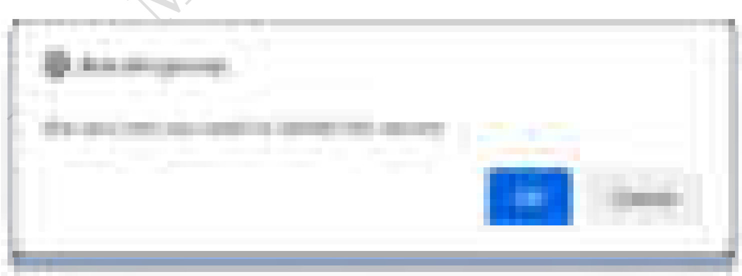
User can publish or unpublish the Funding Agency by clicking on Published section of the list page of Funding Agency. The tick icon represent the published and cross icon represent the unpublished.

3.9 How to Delete Funding Agency?

Step 1: On the list page of Funding Agency "**Edit**" and "**Delete**" action button is available. Click on "**Delete"** action button so that wrong Funding Agency can be deleted.



Step 2: Are you sure you want to delete this record? Question pop-up is displayed with "**OK"** and "**Cancel"** button. Click on "**OK"** button to delete the Funding Agency details.

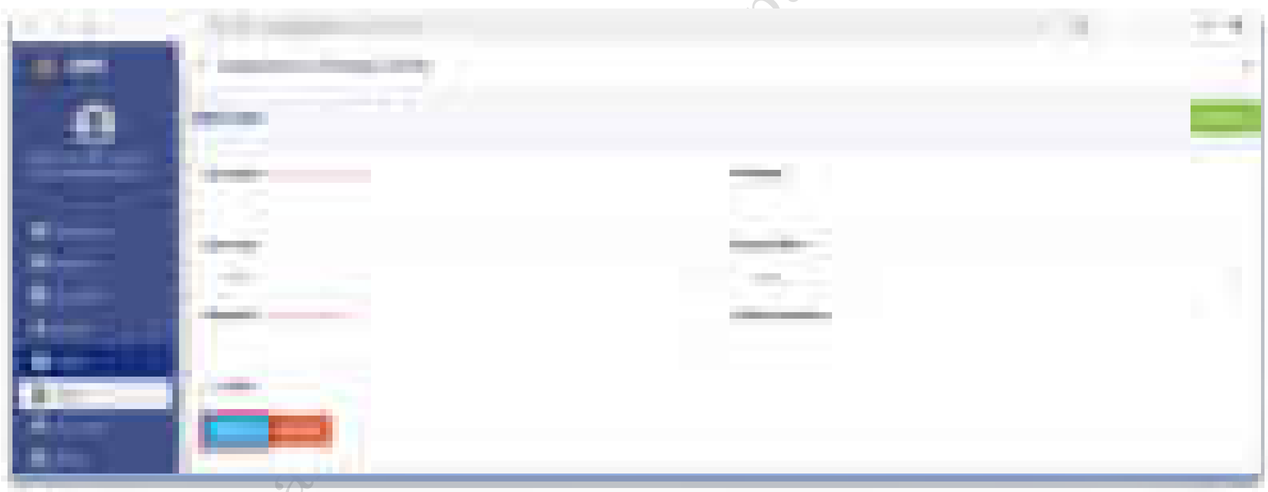


# 4. Users

## 4.1 How to Add User?

Step 1: Click on “**Add User”** button from top right side of the page to add user.

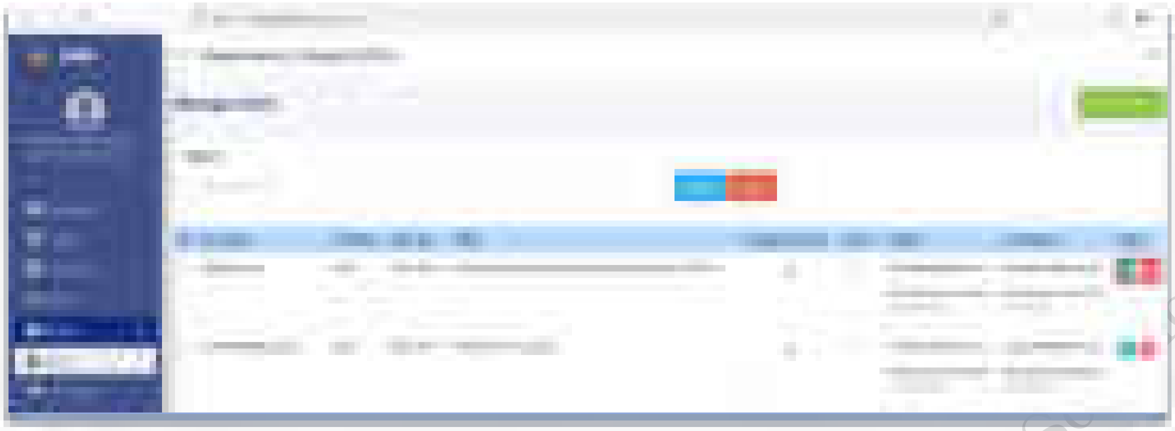
Step 2: Enter all required values in the given fields and click on “**Submit”** button.



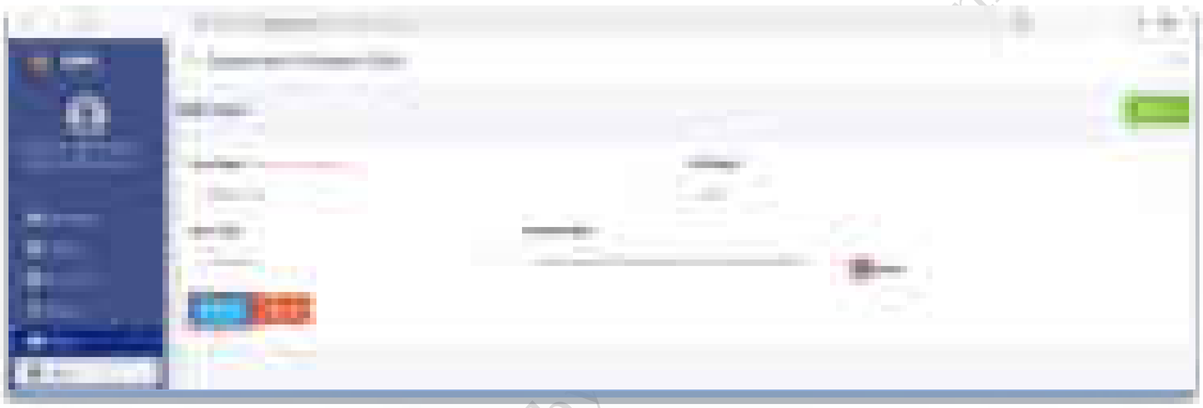
User can active or inactive the User by clicking on check option.

## 4.2 How to Edit User?

Step 1: On the list page of Users “**Edit”** and “**Delete”** action button is available. Click on “**Edit”** action button so that Users details can be edited.

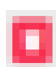


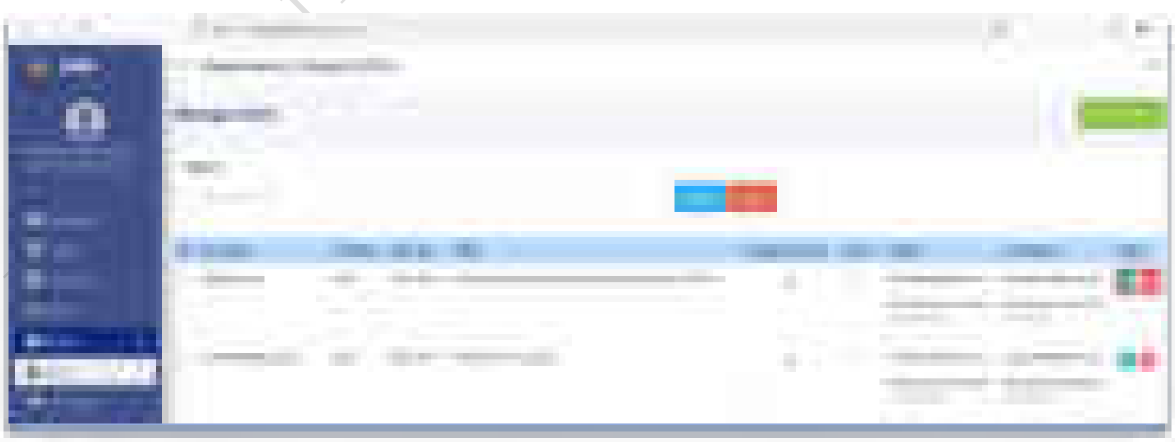
Step 2: Enter all required values in the given fields and click on “**Submit”** button.



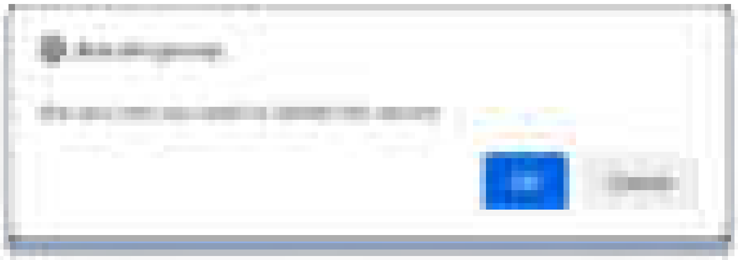
User can active or inactive the User by clicking on check option.

4.3 How to Delete User?

Step 1: On the list page of Users “**Edit”**  and “**Delete”**  action button is available. Click on “**Delete”** action button so that wrong user can be deleted.



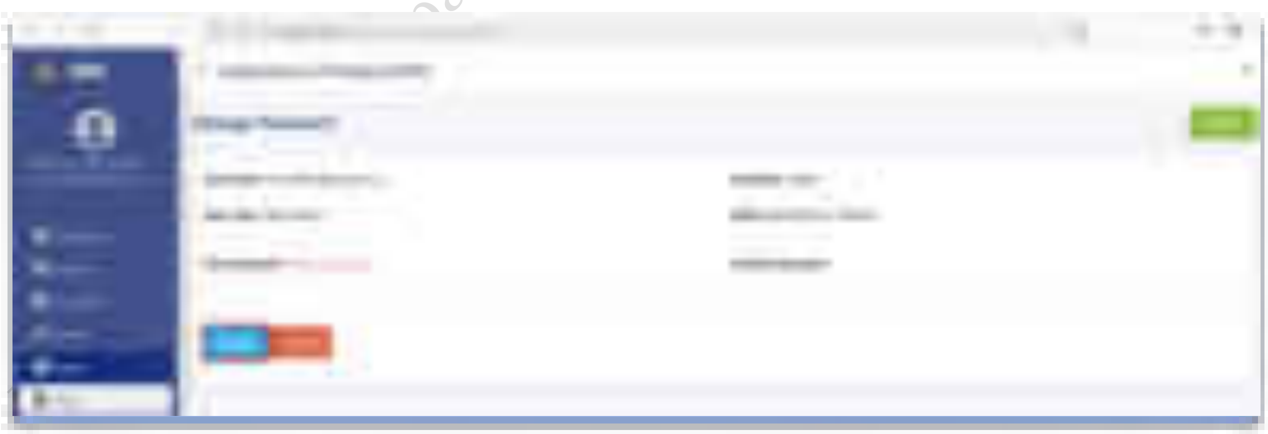
Step 2: Are you sure you want to delete this record? Question pop-up is displayed with “**OK”** and “**Cancel”** button. Click on “**OK**” button to delete the User details.



## 4.4 How to Change Password?

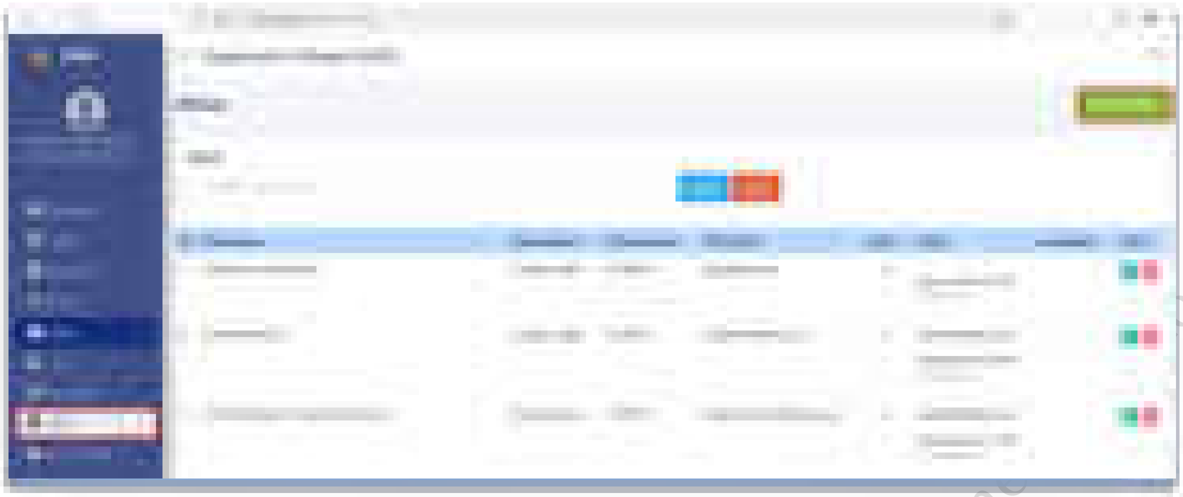
Step 1: On the list page of Users Click on “**Edit”** icon so that password of the particular user can be changed.

Step 2: Enter all required values in the given fields and click on “**Submit”** button.

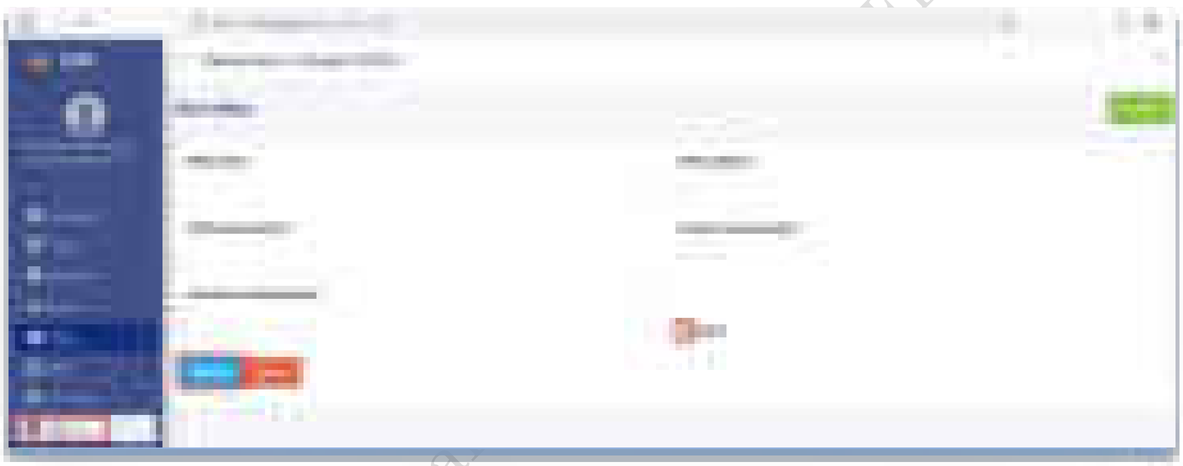


## 4.5 How to Add Office?

Step 1: Click on “**Add Office”** button from top right side of the page to add office.



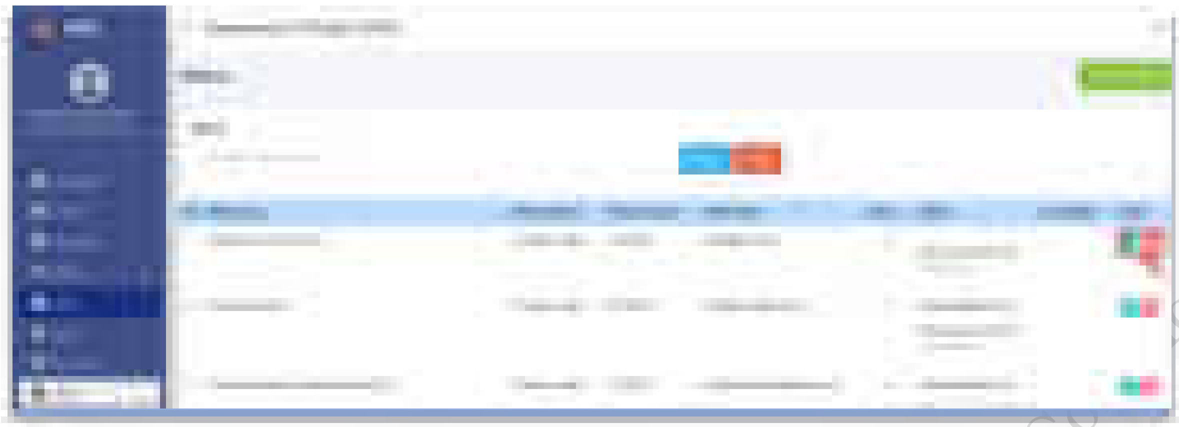
Step 2: Enter all required values in the given fields and click on “**Submit”** button.



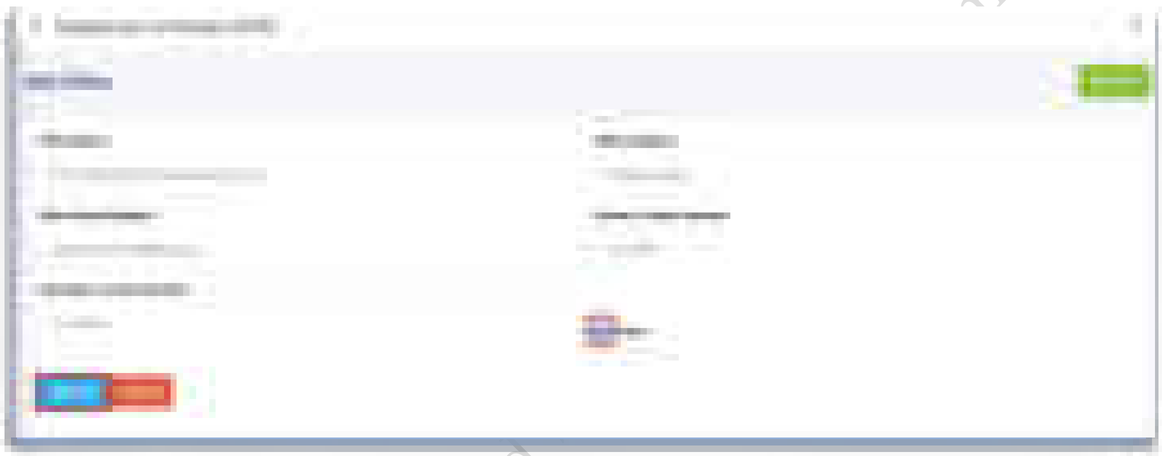
User can active or inactive the Office by clicking on check option.

4.6 How to Edit Office?

Step 1: On the list page of Offices, “**Edit”**  and “**Delete”**  action button is available. Click on “**Edit”** action button so that Office details can be edited.



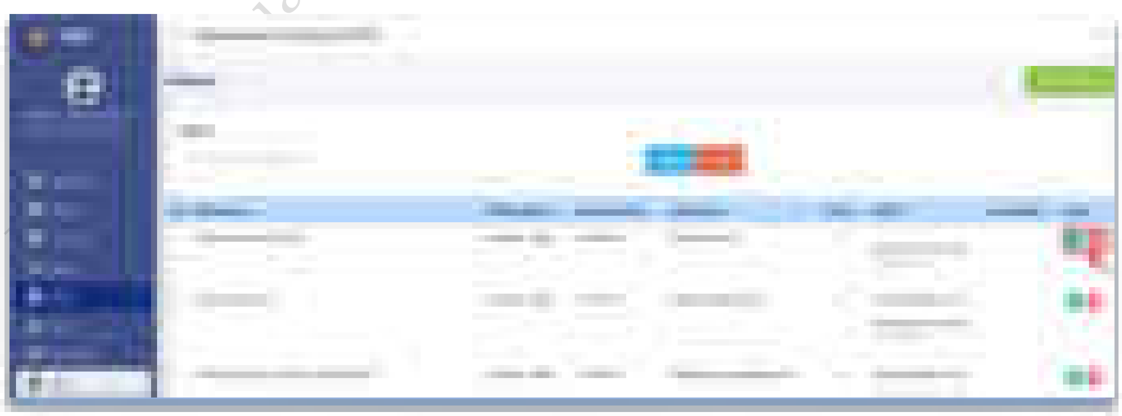
Step 2: Enter all required values in the given fields and click on "**Submit"** button.



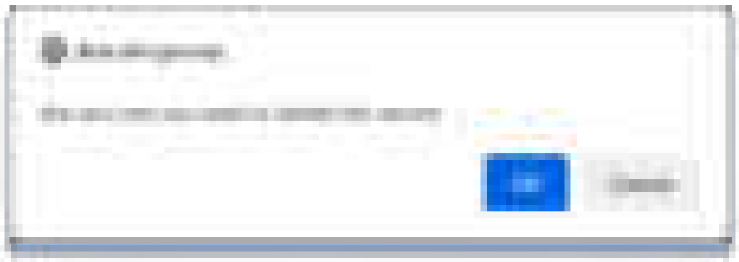
User can active or inactive the User by clicking on check option.

4.7 How to Delete Office?

Step 1: On the list page of Offices, "**Edit"** and "**Delete"** action button is available. Click on "**Delete"** action button so that office can be deleted.

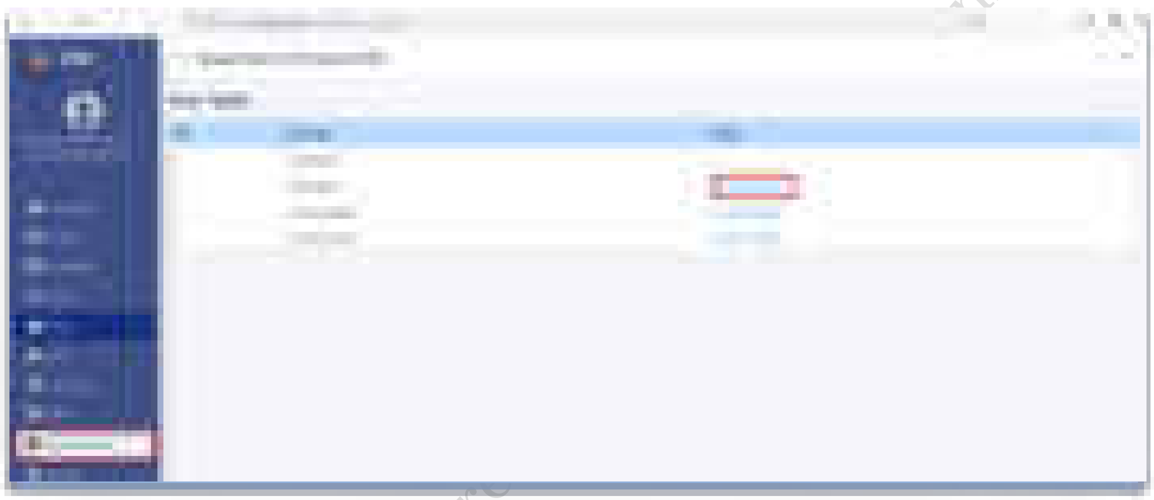


Step 2: Are you sure you want to delete this record? Question pop-up is displayed with "**OK"** and "**Cancel"** button. Click on "**OK"** button to delete the User details.

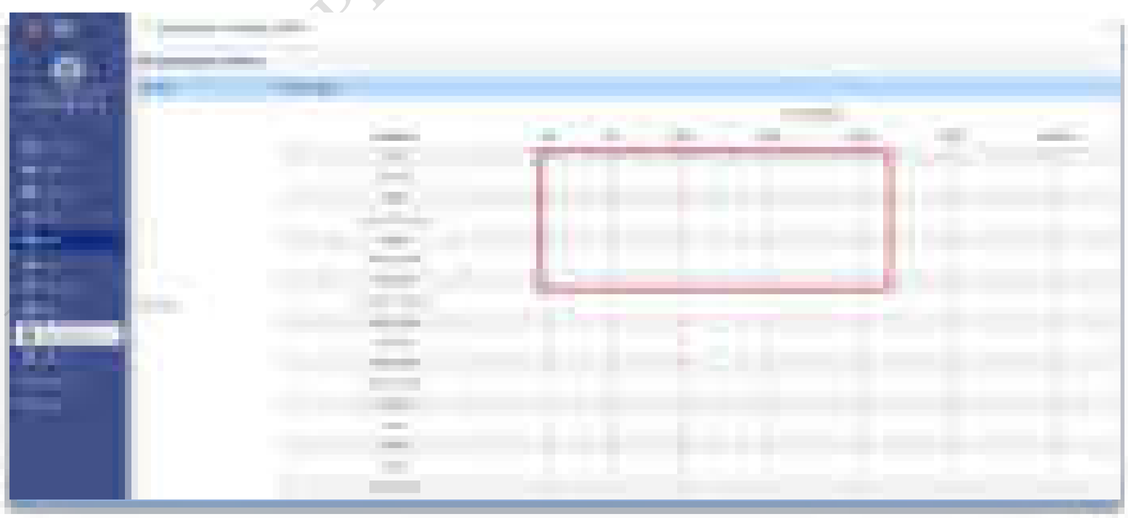


4.7 How to Manage Access Control?

Step 1: On the list page of Access Control, there are list of user types available on the DMS. Click on "**Update Privilege"** action button so that user access for different modules can be controlled.



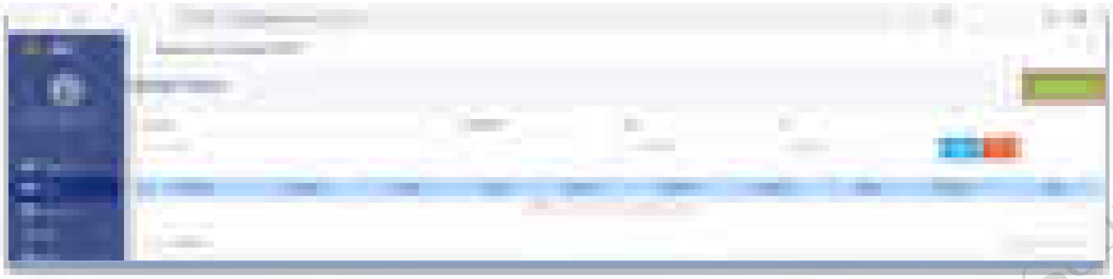
Step 2: Click on the Action privilege on view, add, delete, update, upload and download as shown in the image below with respect to the modules present on the DMS application.



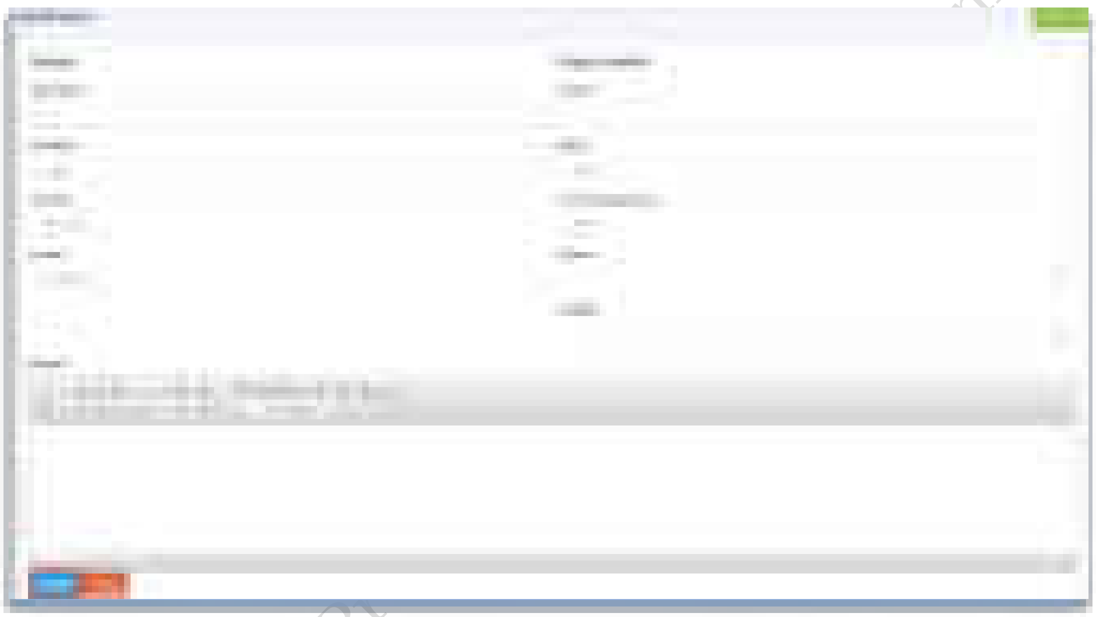
## 5. Projects

5.1 How to Add Project?

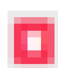
Step 1: Click on "**Add Project"** button from top right side of the page to add Project.

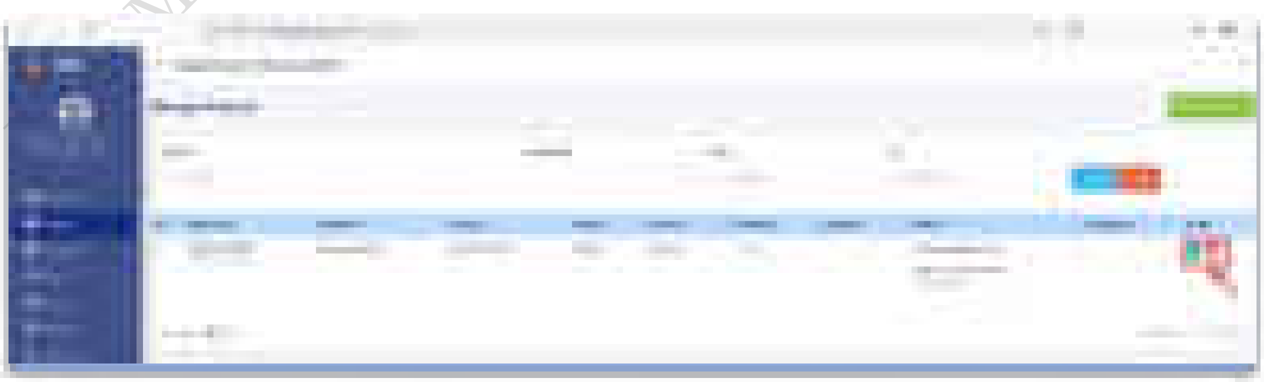


Step 2: Enter all required values in the given fields and click on "**Submit"** button.

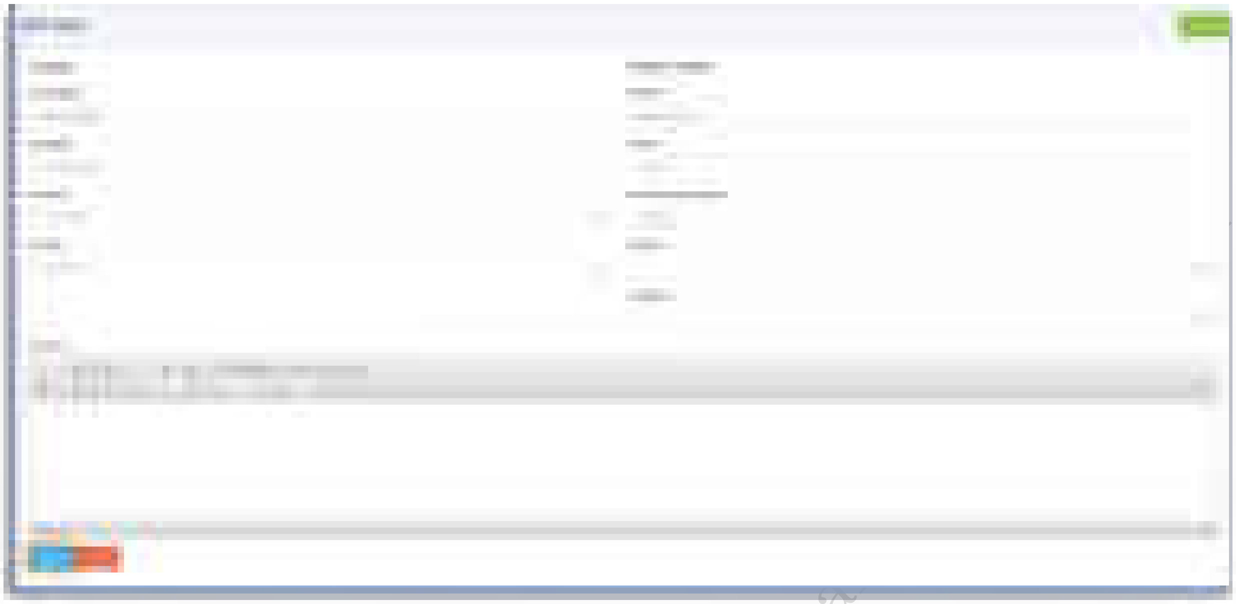


5.2 How to Edit Project?

Step 1: On the list page of Projects, "**Edit"**  and "**Delete"**  action button is available. Click on "**Edit"** action button so that project details can be edited.

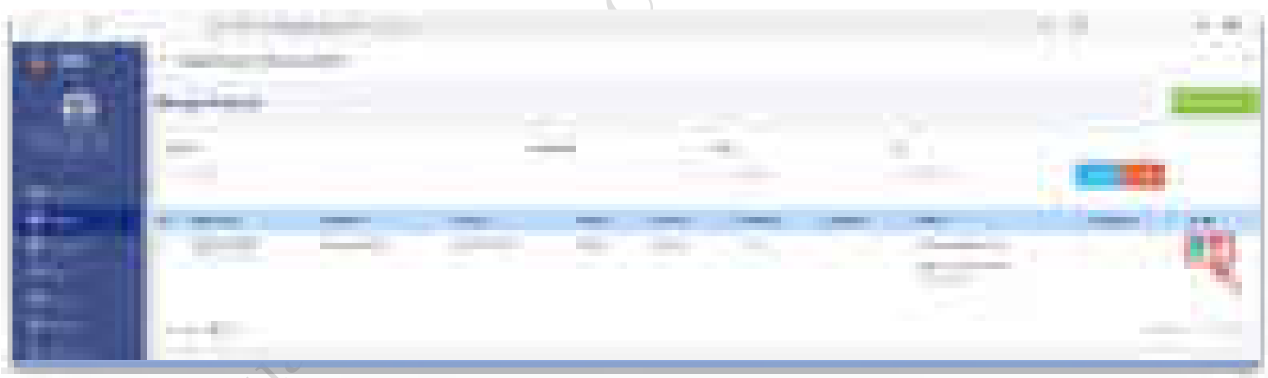


Step 2: Enter all required values in the given fields and click on “**Submit”** button.

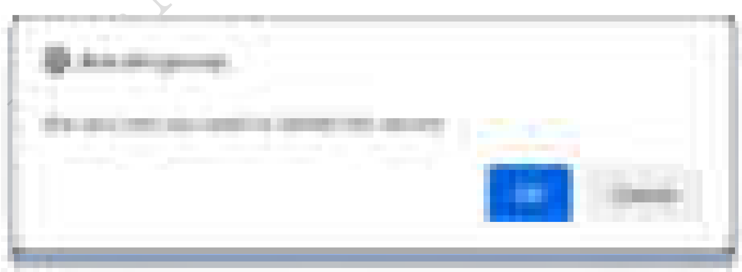


5.3 How to Delete Project?

Step 1: On the list page of Projects, “**Edit”**  and “**Delete”**  action button is available. Click on “**Delete”** action button so that project can be deleted.



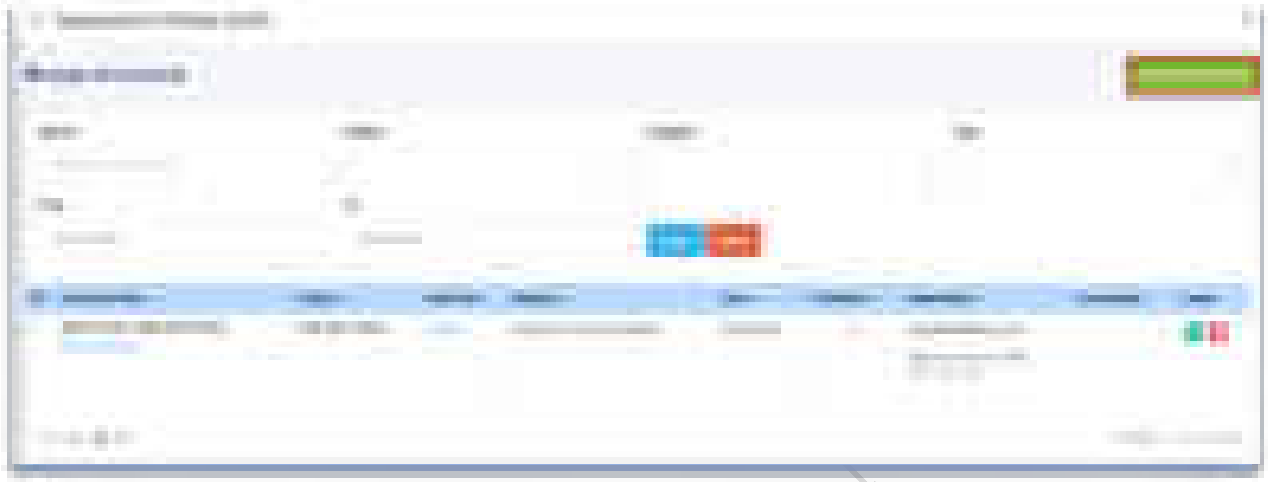
Step 2: Are you sure you want to delete this record? Question pop-up is displayed with “**OK”** and “**Cancel”** button. Click on “**OK”** button to delete the User details.



# 6. Documents

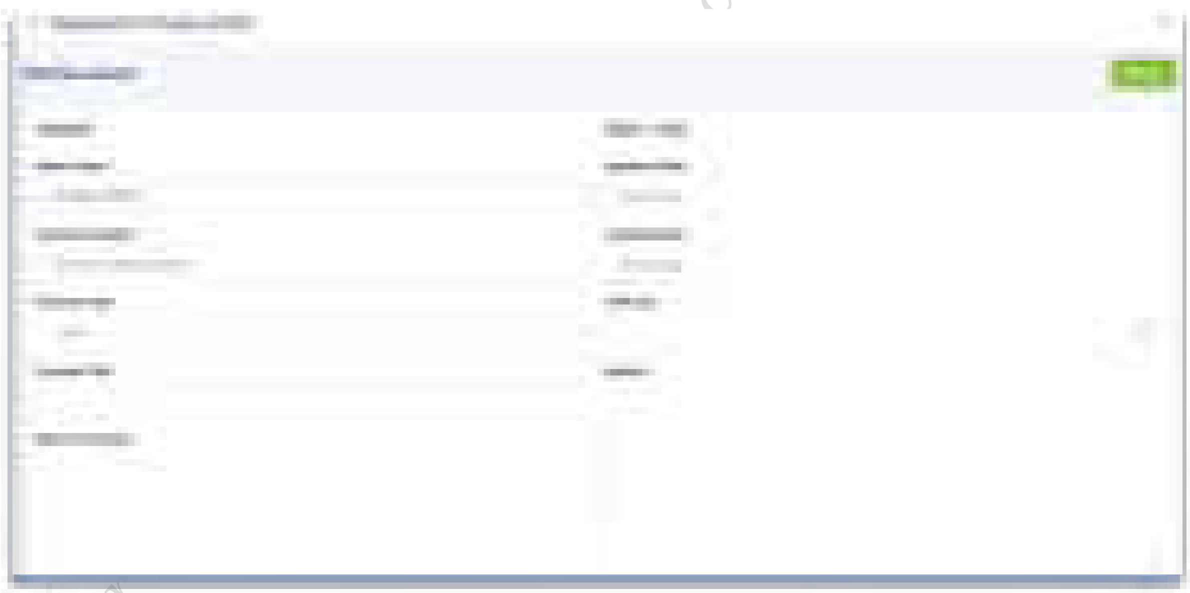
## 6.1 How to Add Document?

Step 1: Click on “**Add Document”** button from top right side of the page to add Document.



Step 2: Select the project and Document Category.

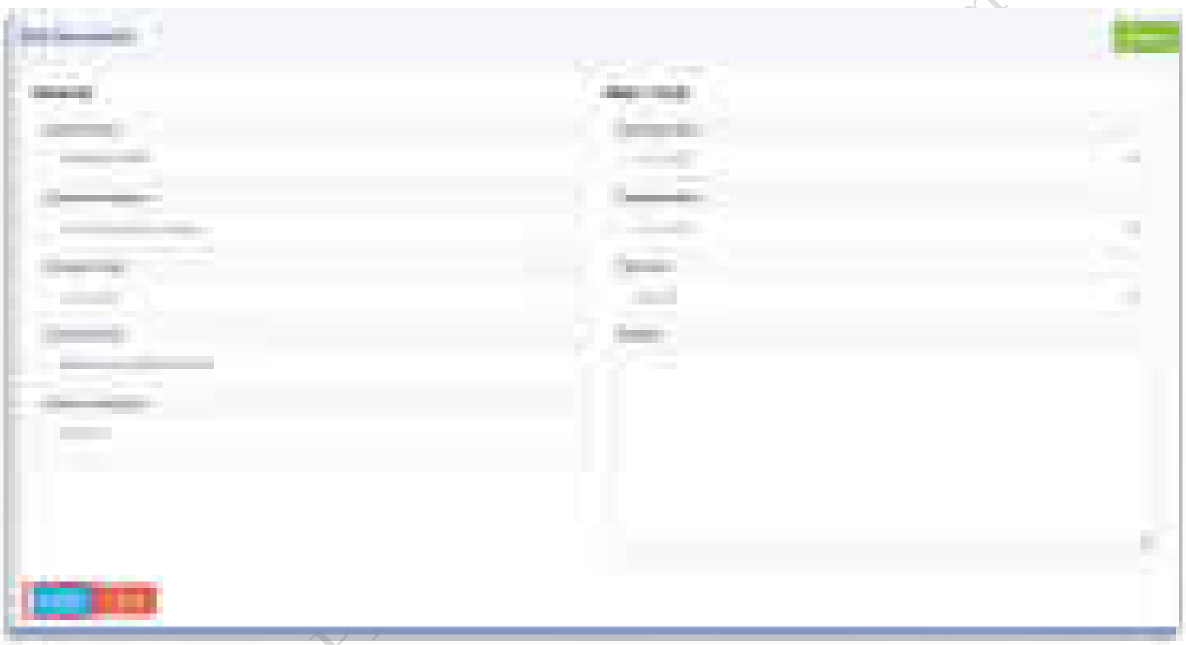
Step 3: Enter all required values in the given fields and click on “**Submit”** button.



## 6.2 How to Edit Document?

Step 1: On the list page of Documents, “**Edit”** and “**Delete”** action button is available. Click on “**Edit”** action button so that project details can be edited.

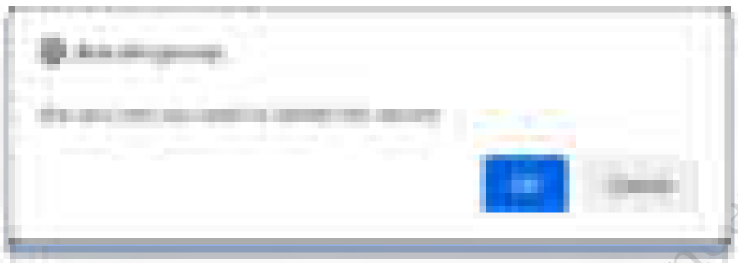
Step 2: Enter all required values in the given fields and click on “**Submit”** button.



## 6.3 How to Delete Document?

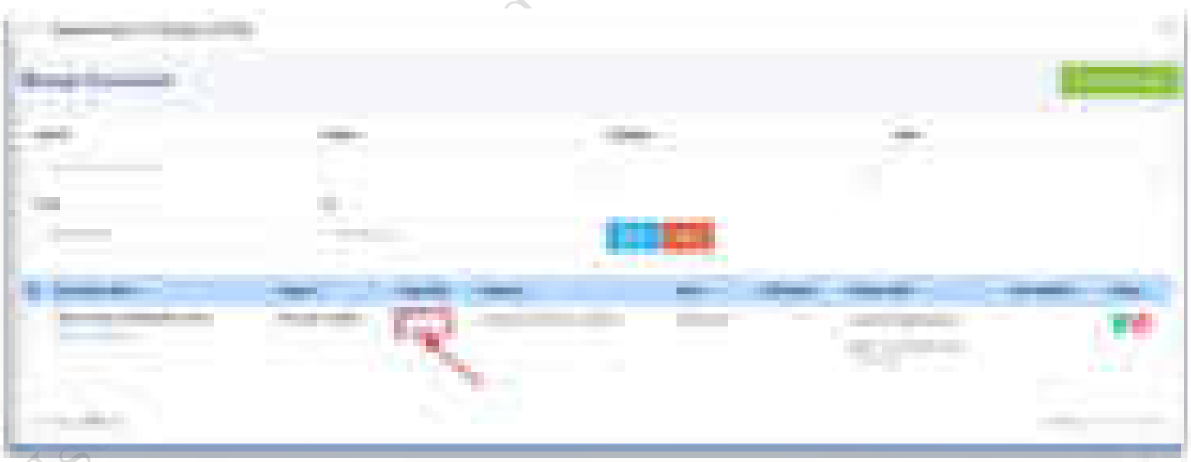
Step 1: On the list page of Projects, “**Edit”**  and “**Delete”**  action button is available. Click on “**Delete”** action button so that project can be deleted.

Step 2: Are you sure you want to delete this record? Question pop-up is displayed with “**OK”** and “**Cancel”** button. Click on “**OK”** button to delete the User details.



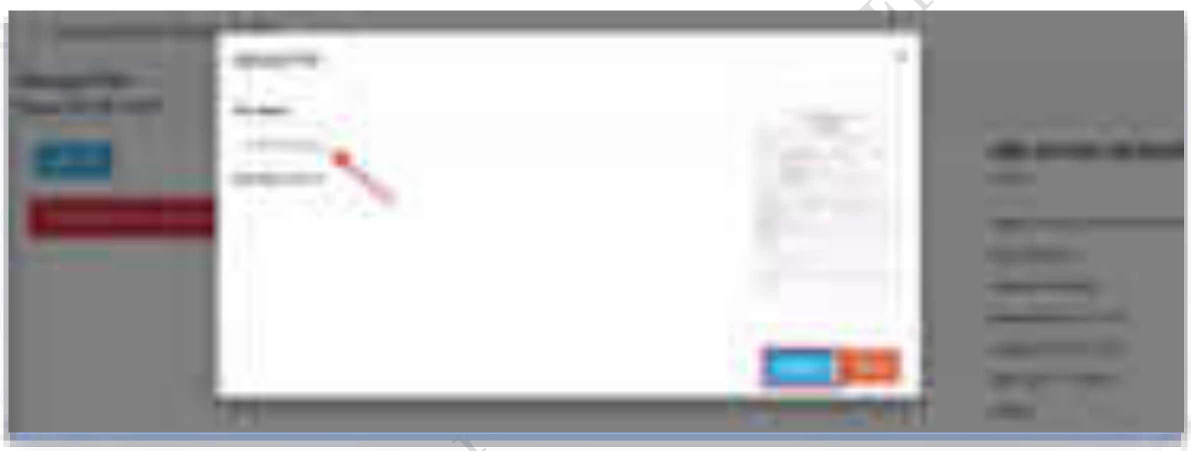
6.4 How to Upload Files on Documents?

Step 1: On the list page of Documents, there is a link on Total Files Click on “**File(s)”** to upload the files on the particular documents.

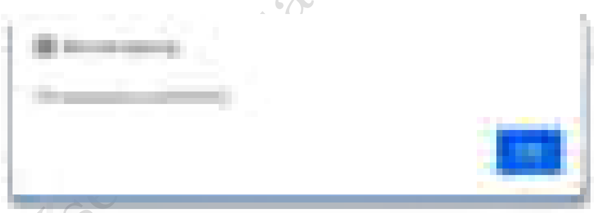


Step 2: Browse the file from your local machine and upload the multiple files on particular documents.

Step 3: After selecting the file from local machine, the upload screen will be pop-up. The file name will be automatically pick from the saved file name on your local machine. If you want to change the file name you can change as per your requirement. Click on "**Upload**" button to upload the files.

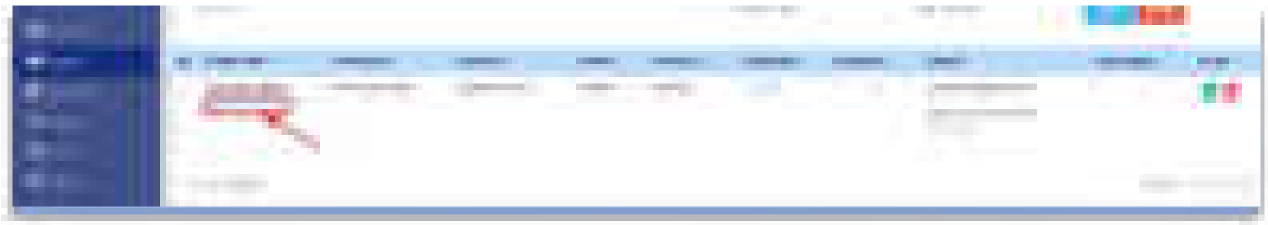


Step 4: File uploaded successfully! message pop-up is displayed with "**OK"** button. Click on "**OK"** button to upload the file.



### 6.5 How to Share Projects? Documents, Files?

Step 1: To share the projects, click on project, below the title of the project, there is a link "**Shared to 0 office(s)**".



Step 2: Then list of active office available on the DMS will be displayed on the pop-up window with multiple option to share the project within the organization.

Step 3: Select all office to share all the office or check and uncheck the multiple option to share the project to the required offices.

Note: Share project will share all the associated documents and files related to particular projects.

### 6.6 How to Share Documents?

Step 1: To share the documents, click on Document, below the Document title, there is a link “**Shared to 0 office(s)**”.

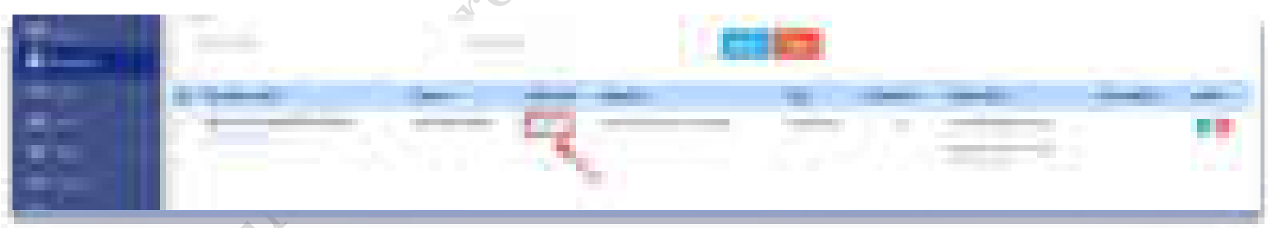
Step 2: Then list of active office available on the DMS will be displayed on the pop-up window with multiple option to share the project within the organization.

Step 3: Select all office to share all the office or check and uncheck the multiple option to share the project to the required offices.

Note: Share Documents will only share the particular documents only not the whole projects.

### 6.7 How to Share Files?

Step 1: To share the files, click on Document, below the Total files, there is a link “**1 File(s)**”. Click on “**1 File(s)**”.



Step 2: Manage file window will open as shown below and click on “**Shared to 0 office(s)**”.

Step 2: Then list of active office available on the DMS will be displayed on the pop-up window with multiple option to share the project within the organization.

Step 3: Select all office to share all the office or check and uncheck the multiple option to share the project to the required offices.

Note: To share the file, the file should be published.

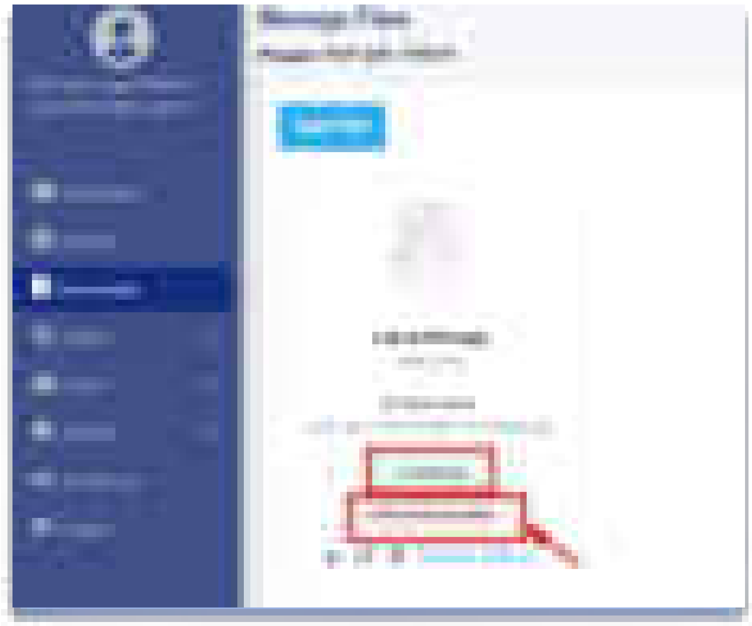
## 6.8 How to make the Files publicly Access?

Step 1: Click on Documents, list of documents will be displayed. Then search the document with the filter criteria available on the documents section.

Step 2: On the list page of Documents, there is a link on Total Files Click on “**File(s)”** to share the files publicly.

Step 3: Make sure the document must be Published.

Step 4: Click on "**No access to Public**" button to make it visible to public on the public page of DMS.

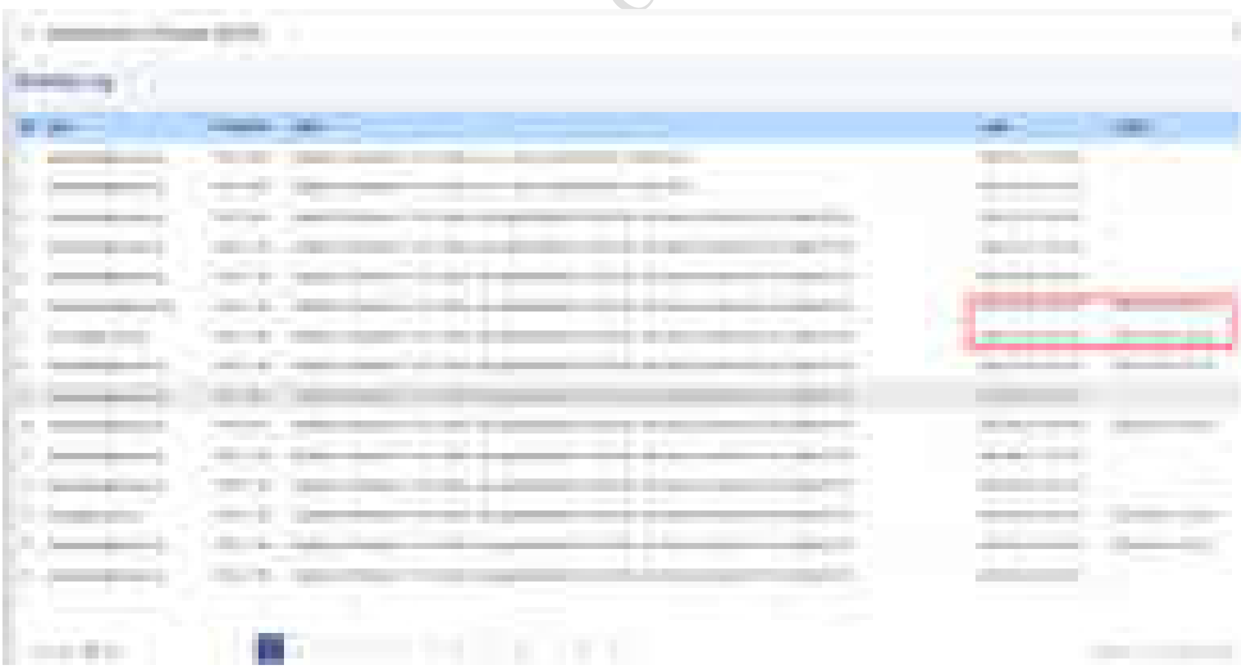




## 7. Activity Log

7.1 How to View Activity Log?

Step 1: Click on Activity Log to view the last login user with login and logout details.



## 8. Logout

8.1 How to Logout?

Step 1: Click on the Logout icon on the left side of the menu.


Dashboard

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