Administration Guide

Electronic Document Management System

Innovative Associative Technology Ltd

Version No.: V1.1 Date: 1st Feb 2018

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1 Introduction

1.1 Objective

This document describes the features to be made by **Innovative Associative Technology Ltd.** (hereinafter abbreviated as IA) for Electronic Document Management System (hereinafter abbreviated as InnoShare).

1.2 Scope of This Document

This document covers:

• functions and features of the electronic document management system

1.3 General Description of InnoShare

InnoShare is a browser-based document management application designed for managing and sharing documents and correspondence in more efficient and organized manner. It looks and feels like Windows Explorer at first glance. Numerous additional features and toolbars are provided for users' convenience.

2 Assumptions

2.1 System Design

- User interface supports British English, Traditional Chinese and Simplified Chinese only.
- Data input using US ASCII character set only.
- Screen resolution of 1920 pixels wide and 1080 pixels high is the standard for user interface design on desktop computer client.
- The limitation of the system is subject to the documented limitation of the underlying operating system, Microsoft Windows 10, Microsoft Windows 8, Microsoft Windows 7, Microsoft Windows Vista, Microsoft Windows XP

2.2 Database Server

- Based on Microsoft Windows 2008 or higher
- Based on Microsoft Internet Information Server 7 or higher
- Based on Microsoft SQL Server 2008 or higher

2.3 Desktop Client

- Based on Microsoft Windows XP/Windows Vista/Windows 7 or higher
- Based on Microsoft Internet Explorer version 8.0 or higher, Chrome, Firefox and Safari
- Form design is based on screen resolution 1920 x 1080 pixels

3 Access to Electronic Document Management System (InnoShare)

To access InnoShare, what you need is a web-browser. Open your web browser and enters the URL of InnoShare http://server/InnoShare/ where server is the computer name of the InnoShare server or access it via the Internet.

| Cloud EDMS x ← → C □ 14.136.113.78/cloudedms/index.html#/login | | | |
|---|-------------------------------------|-------|--|
| | | | |
| | | | |
| | | | |
| | Document Management Console - Login | | |
| | administrator | 4 | |
| | | - | |
| | | Login | |
| | | LOGIN | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

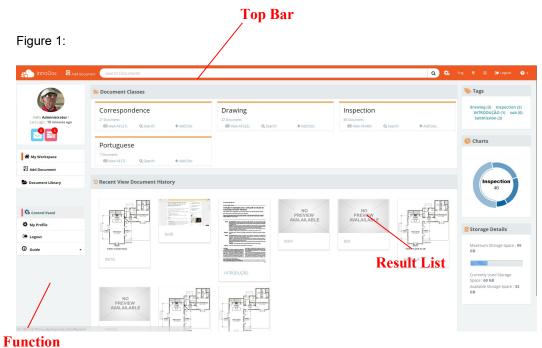
4 Screen Layout

The InnoShare screen is divided into 3 main panels:

1) **Top Bar** – display the full text search, change language, user setting, Logout and user guide.

2) Function Menu – display the application and folders available.

3) Result List – list the documents of the relative application or folders



Menu

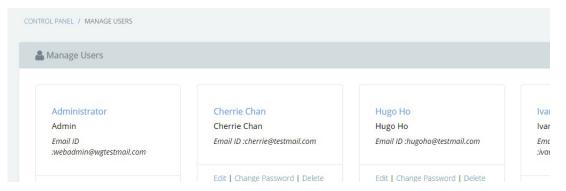
5 Control Panel

Control Panel is administrator setting of InnoShare. It contains Mange Users, Manage User Groups, Manage Organization, Project Info Setup and Manage Document Class. Later this section, we will further discuss each setting and usage of the functions. To access Control Panel, user can click "Control Panel" on Function List.

| InnoDoc 🛛 🗟 Add Docur | nent Search Doci Q 袋 Eng 繁 简 🕞 Logout 💡 - |
|---|---|
| | Control Panel |
| | 🛓 Manage Users |
| Hello Administrator ! Last Login : an hour ago | 📽 Manage User Groups |
| | Ranage Organization |
| 🖀 My Workspace | Project Info setup |
| Add Document | Se Manage Document Classes |
| Video Camera | |
| Document Library | |
| 🖧 Control Panel | |
| 🍄 My Profile | |

6 Manage Users

Mange uses is to manage user information on InnoShare. When user selected Manage User function, InnoShare shows all users on the first page. User can select "Add User" on top right corner or user can manipulate user information by clicking "Edit" on each user.



6.1 Add / Edit Users

User can add new user to InnoShare or Edit current users. Below screen will show for user further action.

| | Fields marked with ¹ | are manuatory | |
|--------------------|---|------------------|---------------|
| User Code * | administrator | | |
| User Name * | Administrator | | |
| Real Name * | Admin | | |
| Email ID * | webadmin@wgte | stmail.com | |
| User Description * | Admin | | |
| Active | €yes ONo | | |
| User Group * | Read Only Group Document Librar Developer Group | y User | |
| Document Classes | ✓ Cherrie | € Correspondence | C Drawing |
| Document classes | Inspection | ✓ IvanClass88 | ✓ IvanClass99 |
| | ☑ IvanTest777 | 🖉 kktest | Portuguese |
| Organization | Cloud EDMS Proj | | |

| User Code | Login ID for InnoShare |
|-------------|--|
| User Name | User name displayed on Function List |
| Real Name | User real name |
| Email ID | User email account for InnoShare send out E-mail to this user |
| User | Description for this user |
| Description | |
| Active | User can login to InnoShare only when this user active is Yes |
| User Group | User can belong to one or more user group. It is for user security setting |
| Document | User can add with document class if user have right to add document to |
| Class | InnoShare. |
| Organzation | User can belong to one organization |
| Enable | Fucntions show on Function List for this user. |
| Menu | |
| Submit | Save the changes. |

6.2 Reset Password

Password can be reset by clicking "Reset Password". The reset password will become "password".

6.3 Delete User

User can be deleted by clicking "Delete User". Deleted user cannot be restored and all related user message, task and approval will be deleted. Below screen will show for your confirmation.

| ᆒ Delete User | | | |
|---------------|------------|-----------------------------|--|
| | User * | Cherrie Chan - Cherrie Chan | |
| | Email ID * | cherrie@testmail.com | |
| | | Confirm Cancel | |

7 Manage User Group

Mange uses group is to manage user group information on InnoShare. When user selected Manage User group function, InnoShare shows all user groups on the first page. User can select "Add User Group" on top right corner or user can manipulate user group information by clicking "Edit" on each user group.

User group can be used on Security setting, Scan Folder, and Assign Action.

| Administrator | MGT | E&M_Mgt | |
|-------------------|----------------|--------------------|--|
| 00. Administrator | 01. Management | 02. E&M Management | |

7.1 Add / Edit User Group

User can add new user group to InnoShare or Edit current user groups. Below screen will show for user further action.

| User Group Code * | | Fields marked with * are mandatory | |
|-------------------|-------|--|--|
| | | Developer | |
| | | | |
| User Group Name * | | Developer Group | |
| | | | |
| | | | |
| User Group Code | ID of | user group on InnoShare | |
| User Group Name | | ay name on InnoShare for User setting, assign rity and assit message/task. | |

7.2 Delete User Group

Save

User group can be deleted by clicking "Delete User Group". Deleted user group cannot be restored and all related user group setting will be removed. Below screen will show for your confirmation.

Save the changes.

🗹 Delete User Group

Do you want to delete this selected user group?

User Group Code: Developer User Group Name: Developer Group

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8 Manage Organization

Mange Organization is to manage organization information on InnoShare. When user selected Manage Organization function, InnoShare shows all organizations on the first page. User can select "Add Organization" on top right corner or user can manipulate organization information by clicking "Edit" on each organization.

Organization will be used on Add document page, Manage User, and Workspace page.

| ONTROL PANEL / MANAGE ORGANIZAT | ION | | |
|---|-------------------------------|---|------|
| Nanage Organization | | Add | Orga |
| CEDMS/2016/06/04 Cloud EDMS Project | Demo Demo Project | IvanClosed Ivan test for closed project | |
| Edit Delete | Edit Delete Organization | Edit Delete | |

8.1 Add/Edit Organization

User can add new organization to InnoShare or edit current organizations. Below screen shows for user further action.

Fields marked with * are mandatory

| Organization Code * | CEDMS/2016/06/04 |
|---------------------|--|
| Organization Name * | Cloud EDMS Project |
| Site Address | Room 402B, Floor 4, Benson Tower, 74 Hung To Road, Kwun Tong, HK |
| Status * | Open OClose |

| Organization Code | ID of organization on InnoShare |
|-------------------|--|
| Organization Name | Display organization name on InnoShare for User setting |
| Site Address | Organization address |
| Status | Open – user can file doucment into this organization |
| | Close – user cannot file document into this organization |
| Save | Save the changes |

8.2 Delete Organization

Organization can be deleted by clicking "Delete Organization". Deleted organization cannot be restored and all related organization setting will be removed. Below screen will show for your confirmation.

C Delete Organization
Do you want to delete this selected Organization?
Organization Code: CEDMS/2016/06/04
Organization Name: Cloud EDMS Project

C 1 - 2 - C1

9 Manage Document Class

Mange Document Class is to manage class information on InnoShare. When user selected Manage Document Class function, InnoShare shows all Document Class on the first page. User can select "Add Document Class" on top right corner or user can manipulate Document Class information by clicking "Edit" on each Document Class.

Document class is an element for classifying document in InnoShare. Document class can be selected on "Add Document" page.

| ROL PANEL / MANAGE DOCUMENT CLASSE | 5 | | |
|------------------------------------|--------------------------------|--------------------------------|---|
| 02 | 08 | HugoCommonClass1 | H |
| 02 auto filing | Files for HR | HugoCommonClass1 | |
| Edit Delete Manage Indexes | Edit Delete Manage Indexes | Edit Delete Manage Indexes | E |
| <mark>kktest</mark> | Testing | Testing2 | |
| kktest. | Class for testing | Class 2 for testing | |

9.1 Add / Edit Document Class

User can add document class to InnoShare or Edit current document class. Manage Indexes is to manage index field on Document Class. Below screen shows for user further action.

| Edit Document Class | | | |
|------------------------------|-------------------|-------------------|-----------|
| | Fields marked wit | h * are mandatory | |
| Document Class Name * | CDS | | |
| Document Class Description * | CDS | | |
| Enable Submission Preview | | | |
| Enable Watermark | | | |
| Report URI | | | |
| Assigned User | Admin Test | Administrator | User Test |

| Document Class Name | ID of Document Class on InnoShare |
|-------------------------------|---|
| Document Class Description | Display Document class description for user selection on add document page. |
| Enable Submission | Enable InnoShare to generate submission form |

| Preview | |
|------------------|--|
| Enable Watermark | Enable InnoShare to generate drawing watermark |
| | stamp. |
| Report URL | Select submission report form |
| Assigned User | Users can add document with this class |
| Submit | Save the changes |

9.2 Manage Index

Index is supporting information which inputted by users for document class. Each document class can contain different index.

| 🗹 Add Index | |
|---------------|--------------------------------------|
| | Fields marked with * are mandatory |
| Index | x Section* Form |
| Inde | ex Name * |
| Index Displa | ay Name * |
| In | ndex Type Text |
| Maximum Index | x Length * |
| Ма | andatory? |
| Re | ead only? OYes ONO |
| To Up | opper Case OYes No |
| Defa | ault Value |
| Index Displa | ay Length M |
| Index Section | Form – Normal document class index |
| Index Name | Index ID to store to Database |
| Index Display | Index Name display on Document Class |
| Name | |
| Index Type | Text User can input any text value |

| Name | |
|------------------|--|
| Index Type | Text – User can input any text value |
| | Integer – User can input integer value |
| | Date – User can input date |
| | Drop Down – User can select preseted value |
| | Preset – User can input any text value with preseted |
| | value |
| | |
| Index Max Length | Index maximun charater |
| Mandatory? | Must contain value in Document Class |
| Readonly? | Cannot edit this index value |
| To Upper Case | Text on this index will automatic to capital letter |
| Default Value | Defaul value on this index |
| Index Display | Display length of this index. |
| Length | |
| Index Order | Index ordering on add document class page |

| User Guide – Electronic De | ocument Management System |
|----------------------------|---------------------------|
| Submit | Save the changes |

Below screen is document class index summary. User can further edit index setting after saved.

| Index Name | Maximum Index Length | Index Type | Index Display Name | Default Value | Index Display Length | Index Order | Action | Read only? | Mandatory |
|-----------------|-------------------------|---------------|----------------------|---------------|-------------------------|-------------|--------|-------------|-------------|
| Running No | 20 | Text | Display of Running N | | | 0 | Û | ⊙Yes ●No | ⊙Yes ●No |
| Common_Number | 0 | Number | Common_Number | | | 100 | Û | ⊙Yes ●No | ⊙Yes ®No |
| Template Header | Start 0 Row | 1 | Template Data S | tart 0 | Templa Sheet Nat | | | | U |

9.3 Reference No Setup

User can define their own reference no for each document class by "Reference No Setup" function. Once the reference no was setup, the reference no of the document will be automatically generated.

| ✿ Reference No. Setup | |
|-----------------------|---|
| Document Class Name | CDS |
| Expression field | Class Name |
| Expression | {{#PROJECT}}_{{#CLASS}}/{{#SUBMISSION TYPE}}/{{#DISCIPLINE CODE}}-{{#RUNNIN |
| Preview | {{#PROJECT}}_{{#CLASS}}/{{#SUBMISSION TYPE}}/{{#DISCIPLINE CODE}}-{{#RUNNIN |

| Document Class Name | Preivew the document class name |
|------------------------|--|
| Expression field | List of user define field for setup the reference no.w |
| + | Add the selected Expression field to Expression |
| Expression | User defined reference no expression. User can key in the static prefix and the separator. |
| Preivew | Preview the user defined reference no. |
| Submit | Save the changes |

10 Manage Common Field

Common Field is field/index that share for different document class on InnoShare. When user selected Manage Common Field function, InnoShare shows all common fields on the first page. User can select "Add Common Field" on top right corner or user can manipulate common fields information by clicking "Edit" on each common field.

Users can search documents on InnoShare with inputed field values.

| NTROL PANEL / MANAGE COMMON FIE | LD | | |
|---------------------------------|----------------------------------|------------------------------------|------|
| 🖢 Manage Common Field | | | |
| cf2 cf2 | Common_Date Common_Date | Common_DropDown Common_DropDown | Com |
| Edit Delete | Edit Delete | Edit Delete | Edit |
| Common_String Common_String | Common_TextBox Common_TextBox | CommonField1 CommonField1 | |

10.1 Add / Edit Common Field

User can add new common field to InnoShare or Edit current common field. Below screen will show for user further action.

| | Fields marked with * are man | datory | |
|----------------|------------------------------|--------|--|
| Field Name * | Common_Date | | |
| Description * | Common_Date | | |
| Index Type * | Date | | |
| Input Length * | 10 | | |

| Field Name Description Index Type | Name of the common field to store to database Display name to show on Add Document page Text – User can input any text value Integer – User can input integer value Date – User can input date Drop Down – User can select preseted value Preset – User can input any text value with preseted value |
|---|---|
| Input Length | Length of the field to allows user input |
| Document Classes | This field share to which document class |
| Save | Save the changes |