Administration Guide

for

Electronic Document Management System

Innovative Associative Technology Ltd

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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.
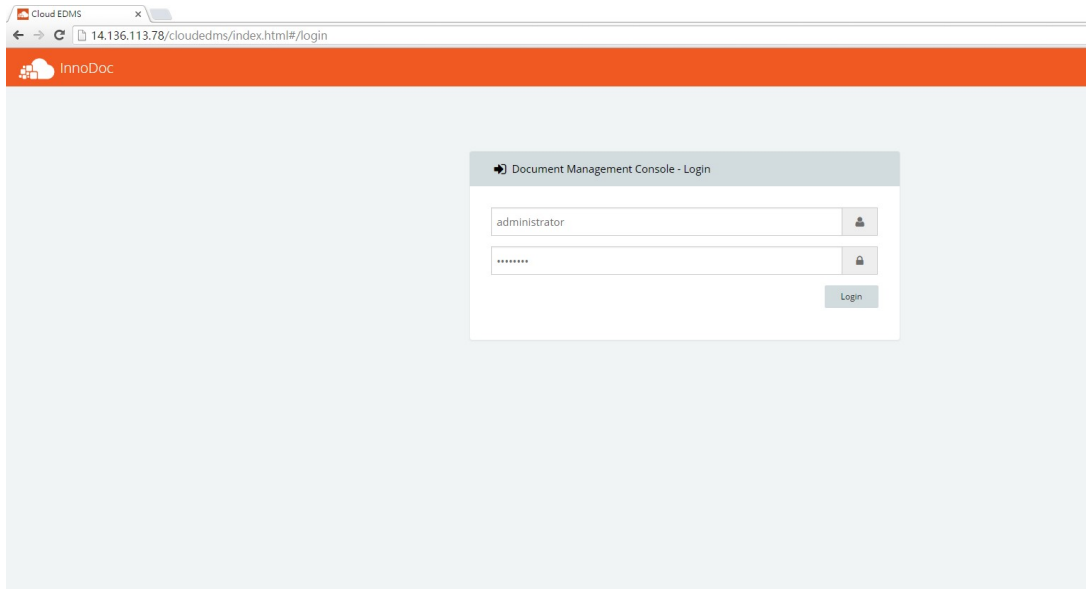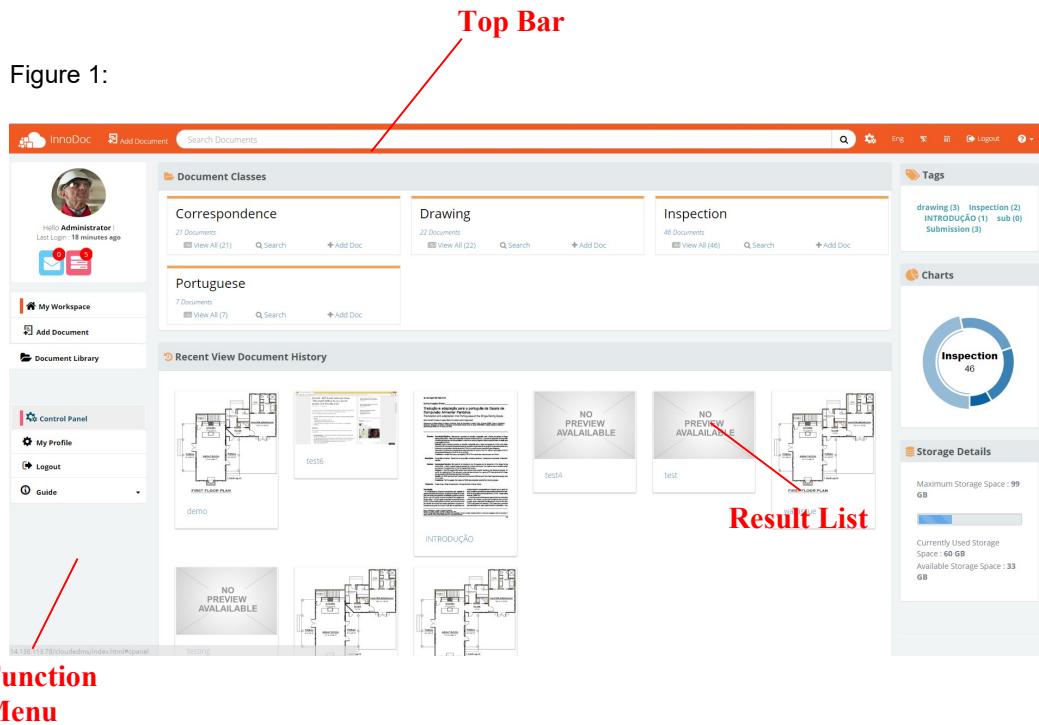
4   Screen Layout

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

Figure 1:

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.
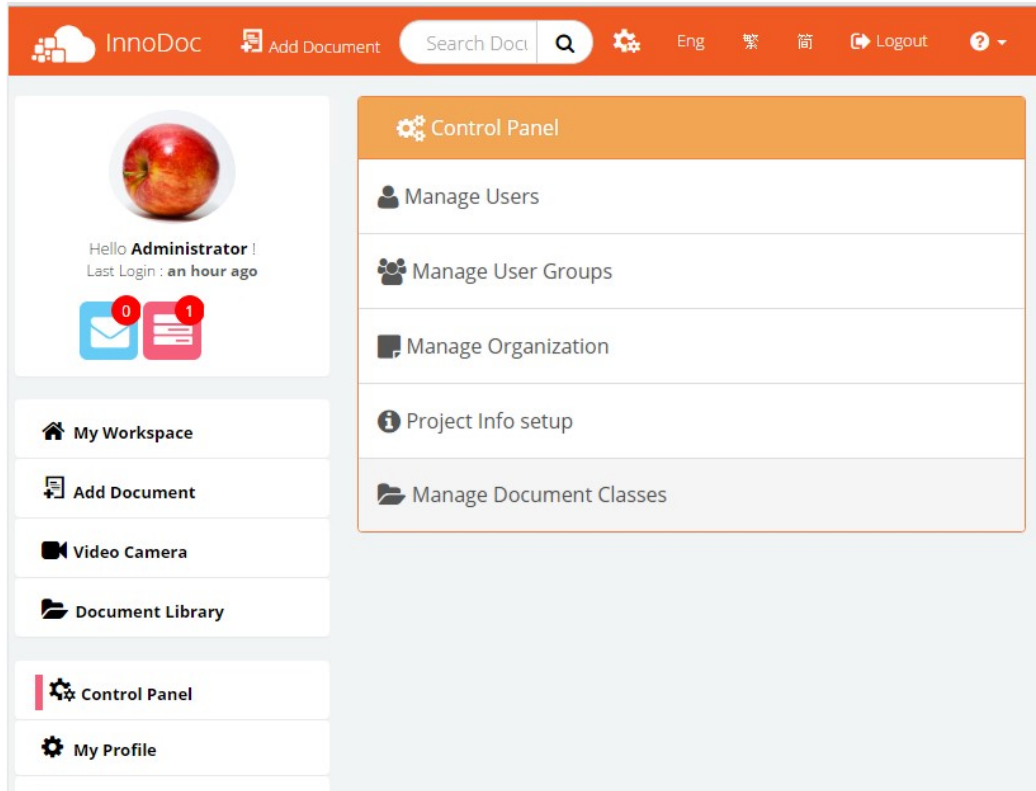
6 Manage Users

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.
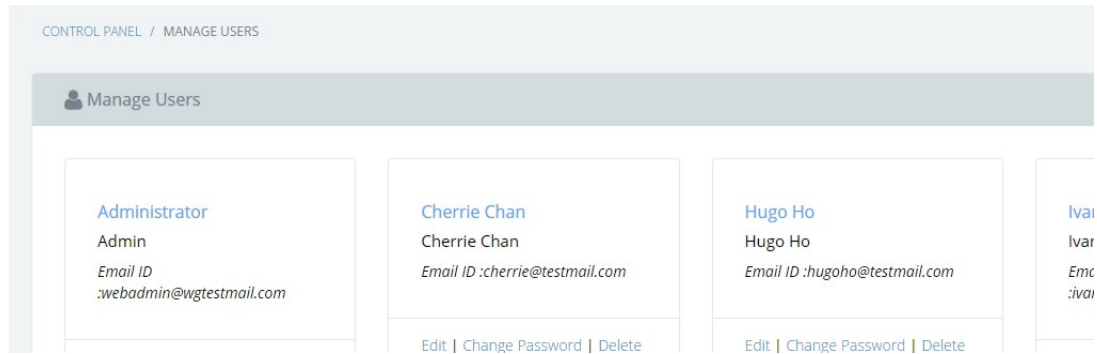
6.1 Add / Edit Users

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

Fields marked with * are mandatory

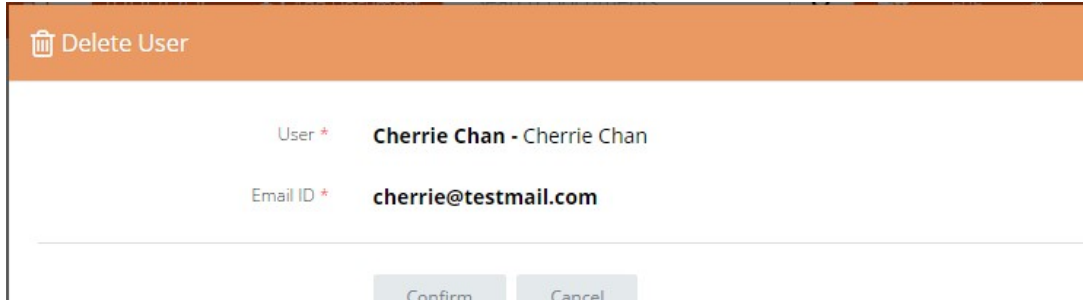| User Code * | administrator |
User Name *	Administrator
Real Name *	Admin
Email ID *	webadmin@wgtestmail.com
User Description *	Admin
Active	⦿Yes ◯No
User Group *	Read Only Group Document Library User Developer Group
Document Classes	☑ Cherrie ☑ Correspondence ☑ Drawing ☑ Inspection ☑ IvanClass88 ☑ IvanClass99 ☑ IvanTest777 ☑ kktest ☑ Portuguese
Organization	Cloud EDMS Project

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	Description for this user
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 Class	User can add with document class if user have right to add document to InnoShare.
Organzation	User can belong to one organization
Enable Menu	Fucntions show on Funciton List for this user.
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.

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.
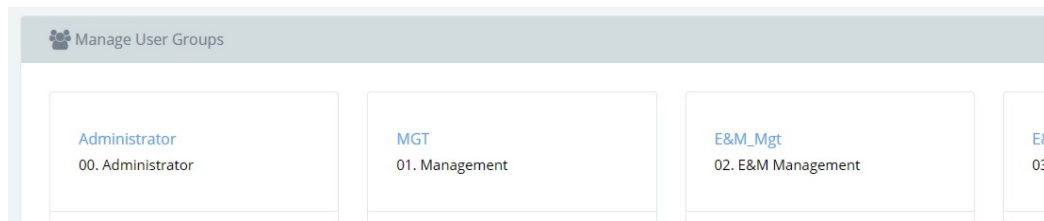
7.1 Add / Edit User Group

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

User Group Code	ID of user group on InnoShare
User Group Name	Display name on InnoShare for User setting, assign security and assit message/task.
Save	Save the changes.

7.2 Delete User Group

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.
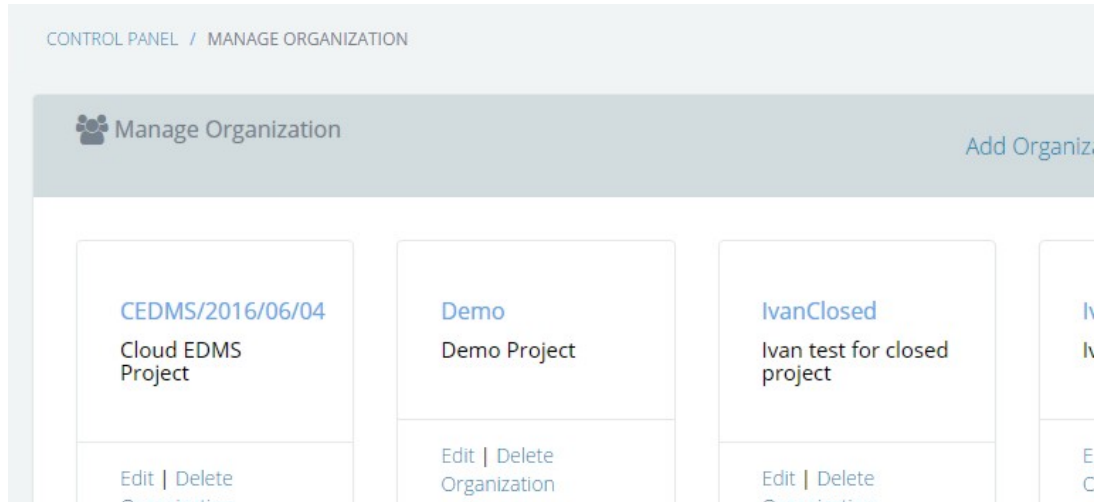
8 Manage Organization

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.

8.1 Add/Edit Organization

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

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.

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.
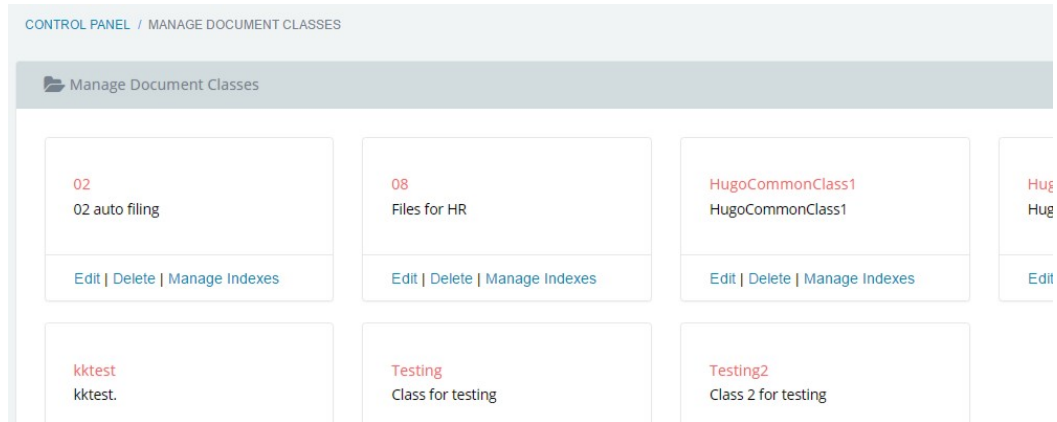
9.1 Add / Edit Document Class

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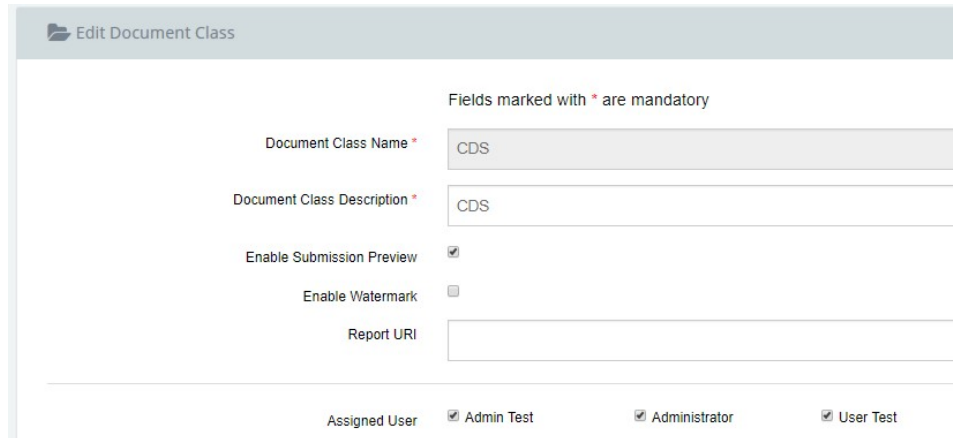
Document Class Name	ID of Document Class on InnoShare
Document Class Description	Display Document class description for user selection on add document page.
Enable Submission	Enable InnoShare to generate submission form

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.

Index Section	Form – Normal document class index
Index Name	Index ID to store to Database
Index Display Name	Index Name display on Document Class
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 Length	Display length of this index.
Index Order	Index ordering on add document class page

Submit	Save the changes

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

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.

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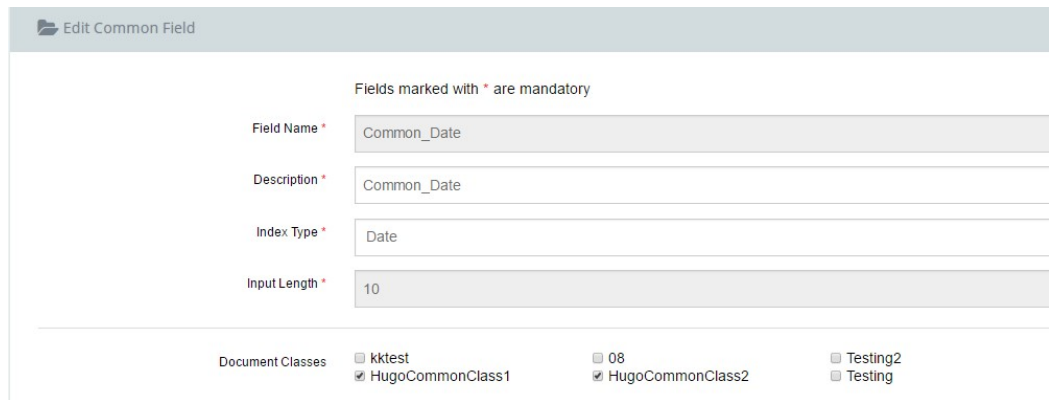|	
Document Class Name	Preivew the document class name
Expression field	List of user define field for setup the reference no.w
+	Add the selected Expression field to Expression
Expression	User defined reference no expression. User can key in the static prefix and the separator.
Preivew	Preview the user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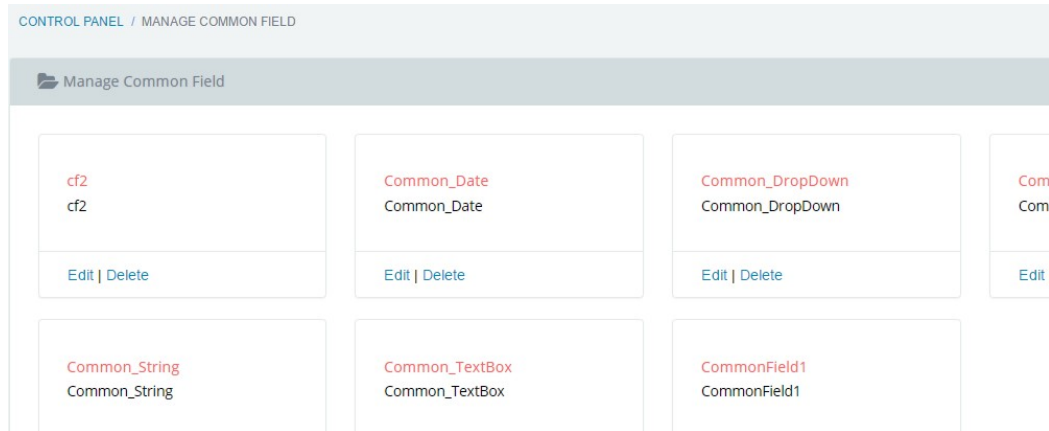
10.1 Add / Edit Common Field

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

Field Name	Name of the common field to store to database
Description	Display name to show on Add Document page
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
Input Length	Length of the field to allows user input
Document Classes	This field share to which document class
Save	Save the changes