

User 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. 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

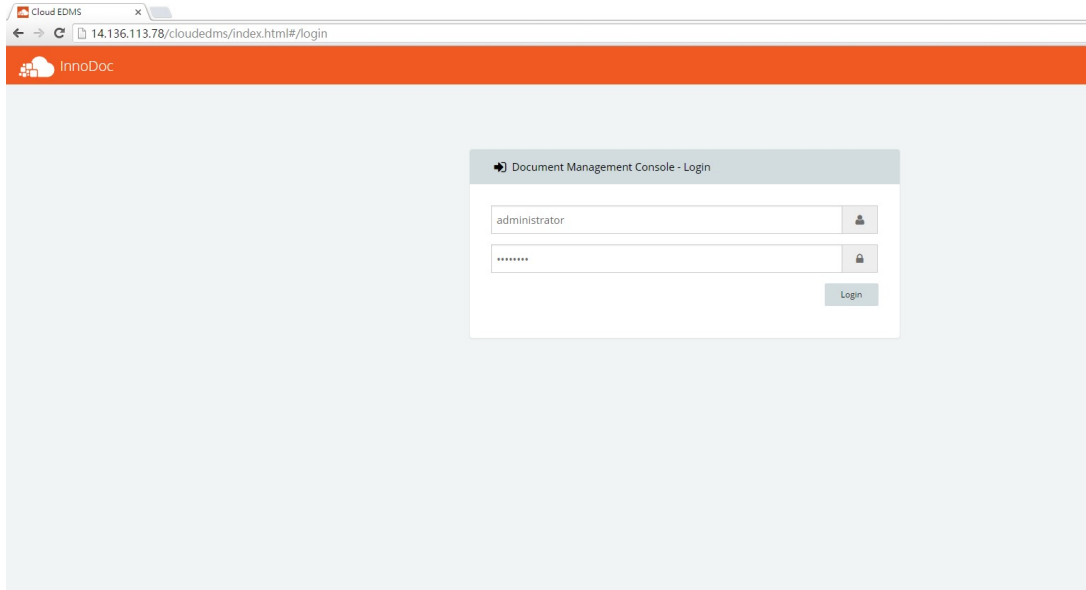
- Based on Microsoft Windows 2008 or higher
- Based on Microsoft Internet Information Server 7 or higher
- Based on Microsoft SQL Server 2008 or higher

2.3 Desktop Client

- Based on Microsoft Windows XP/Windows Vista/Windows 7 or higher
- Based on Microsoft Internet Explorer version 10.0 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.

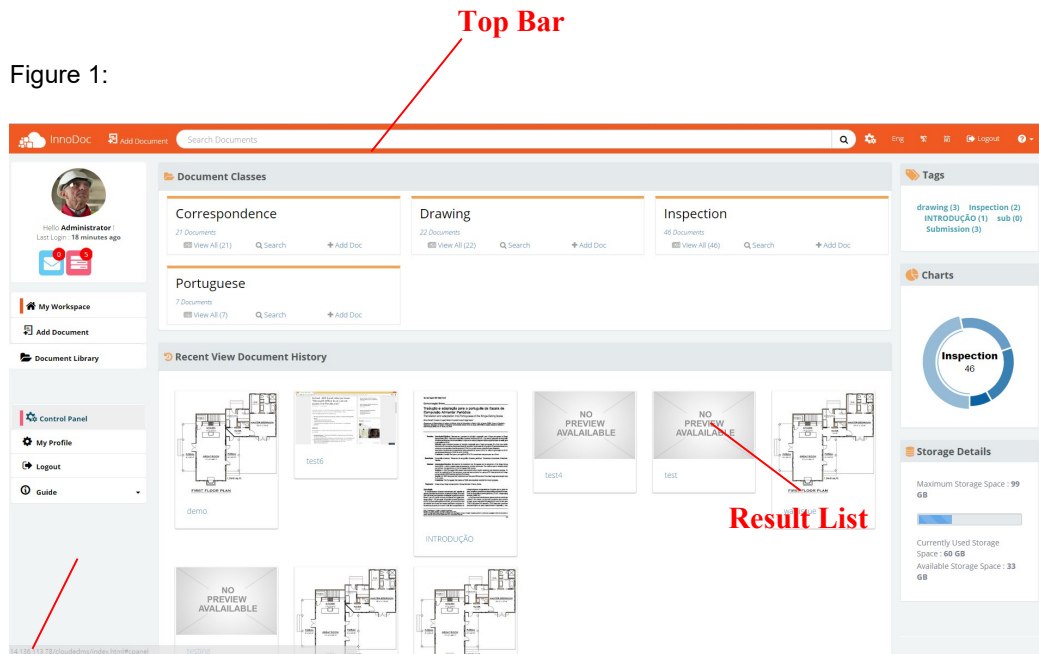


4 Screen Layout

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:



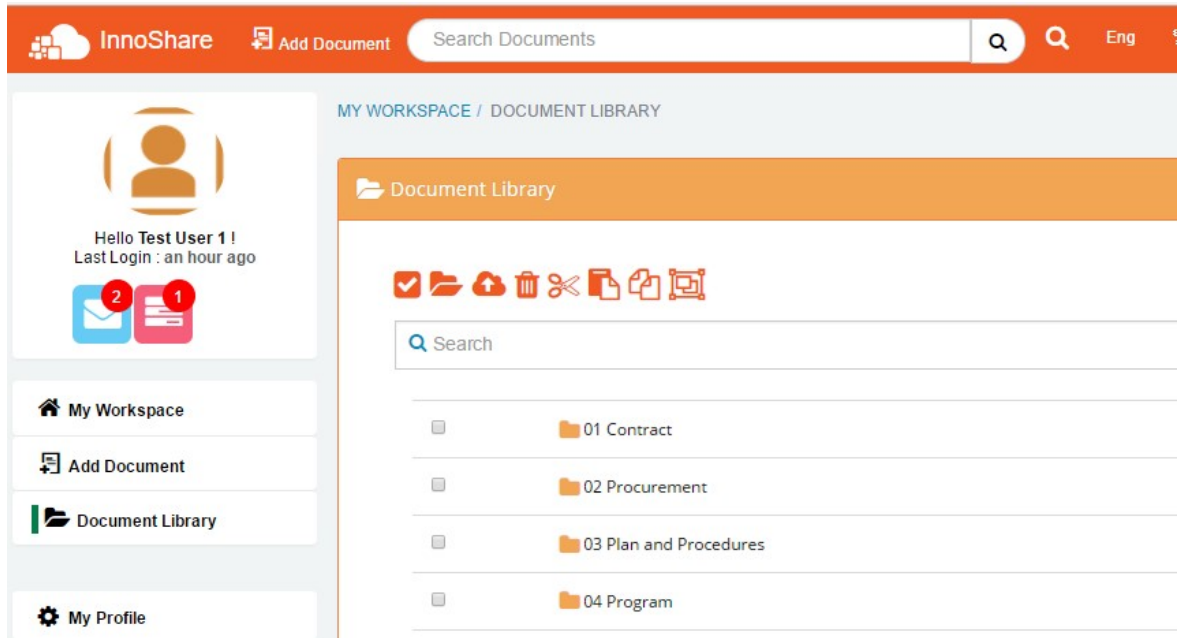
**Function
Menu**

5 Document Library

Document Library is the centralized location for storing all the documents. It is well constructed and categorized for the documents. You can go to the Document Library and you will see the folder. Click the Document Library function on the left-hand side of the Function Menu and it will expand the folder tree on Result List.

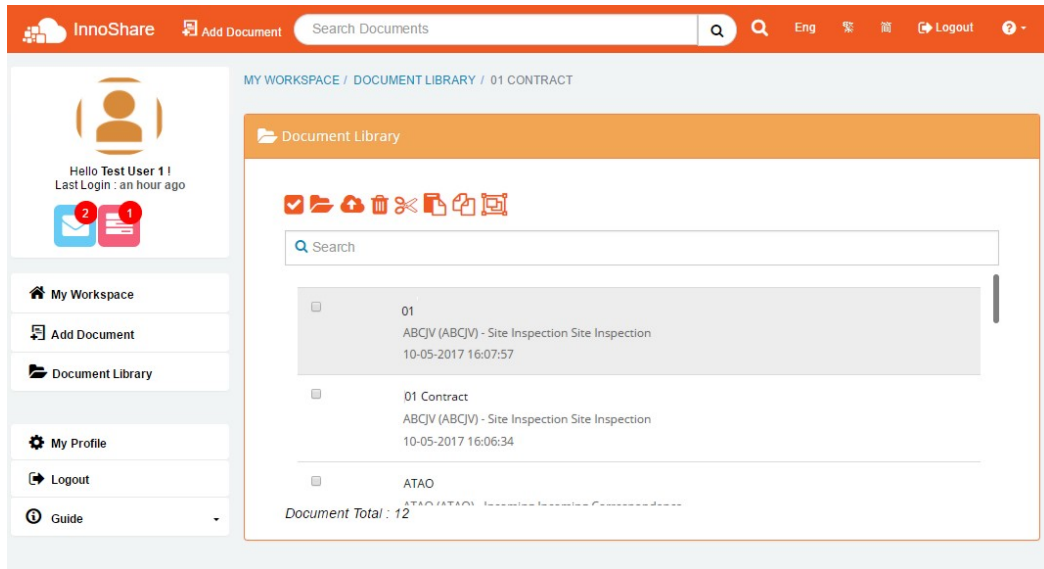
5.1 Folder Structure

Folder structure has been created based on the user requirement and you can see the folder name for accessing the document whatever you need. By clicking on the folder to expand on the subfolders, you can further find any folders you would need. And simply click on the folders you can see the documents on the Result List.



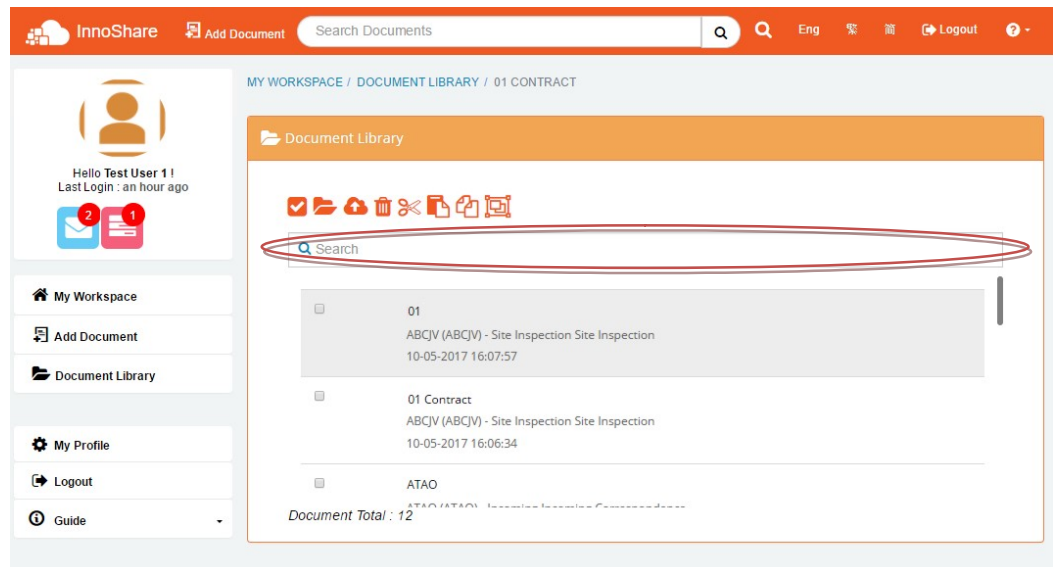
5.2 Document List

You can see all the folders and documents shown in the document list. Document subjects will be shown for your selection. For accessing the document, simply click the icon of the document and you will see the document.



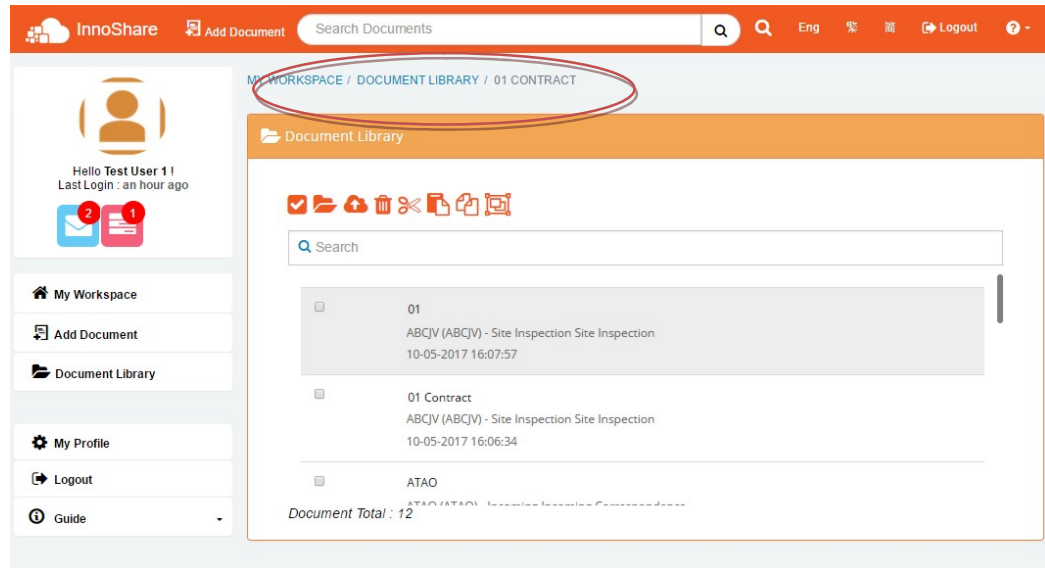
5.3 Folder Search

There is a folder search section on the top of the document list view. User can input any keywords in the text box and press enter. The search result will display in the document list view. It will full text search all the documents including the profile fields and the content of the documents in this folder.



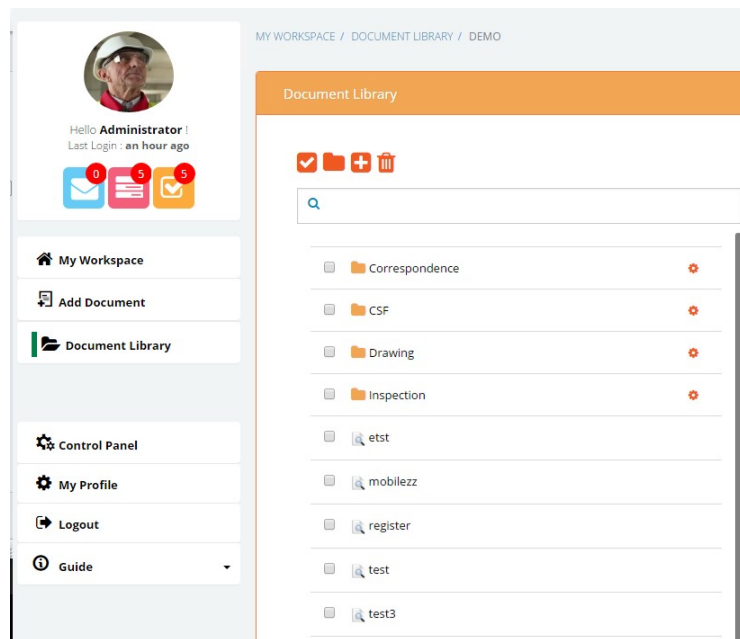
5.4 Folder Navigation


On the top of the document list, you can see folder path. User can click on the folders to switch back to previous folder.




5.5 Document functions


There are functions after you selected Document Library on Function List.

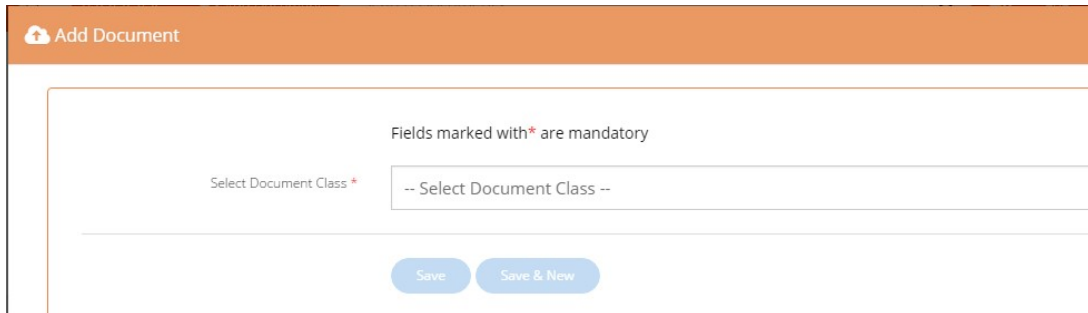



: Multit select documents for deletion.


: Add Folder. User can add folder directly after clicking Add Folder icon.




: Add Document. User can add documents under this folder after clicking Add Document icon.




: Delete Folder / Document. User can select folder and/or document to do the deletion.

: Cut Folder / Document. User can select folder and/or document to cut.

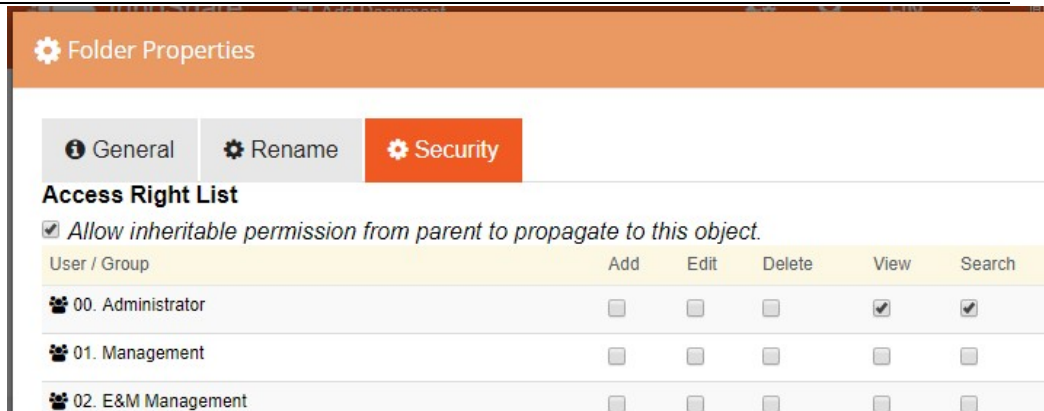
: Paste Folder / Document. User can paste folder / document to a selected folder.

: Copy Structre. User can copy a folder structure for pasting.

: Paste Structure. User can paste a copied folder structure to a selected folder.



:
Security Setting. There is a security setting button on folder. User can press the setting button to access the setting page.



Add: Allows user to add document to this folder.

Edit: Allows user to edit the document content on this folder.

Delete: Allows user to delete the document under this folder.

View: Allows user to view the uploaded document under this folder.

Search: Allows user to search the document under this folder.

Print: Allows user to print the uploaded document under this folder.

Admin: Allows user to management folder security and folder index on this folder.

Rename folder: User can select Rename tag to rename the folder.

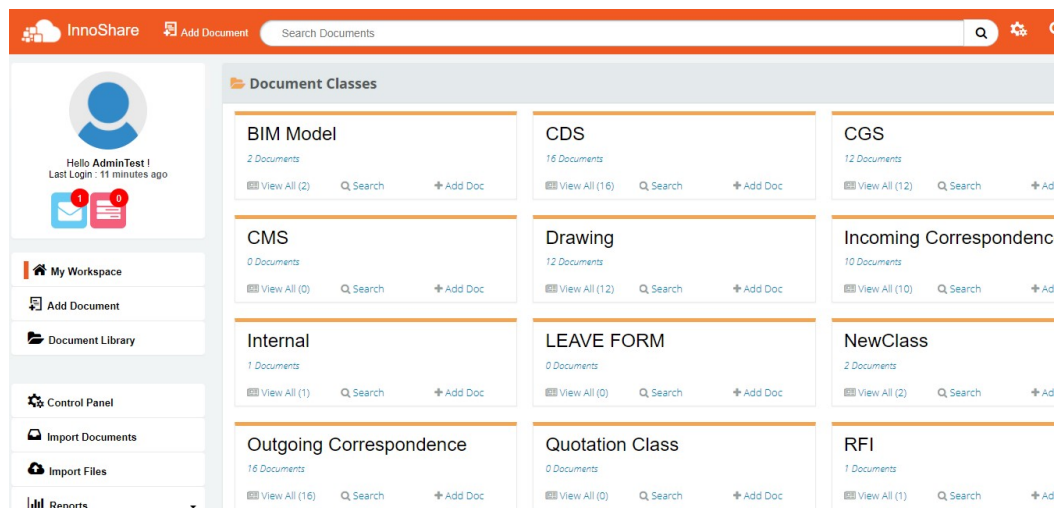


6 Function List

The Function List is a navigation area for selecting different section of InnoShare. User can access different sections easily by simply click the subject of the section.

6.1 My Workspace

My Workspace is InnoShare welcome page for user. There are different sections for user viewing documents, like Document Class, Recent View Document, Bookmark, Tags and Charts.



6.1.1 Document Class

Documents in InnoShare will be classified into different document class. This section is a document class grouping of documents.

“View All”: User can view full document list by class by clicking “View All” in each class.

“Search”: User can search document by class and its user define index.

“Add”: User can add document directly with that document class.

6.1.2 Tags

Tag is second grouping method for documents (other than Document Class). Documents can belong to different tags for their grouping.

User can add tags at document index page.

Document Tag

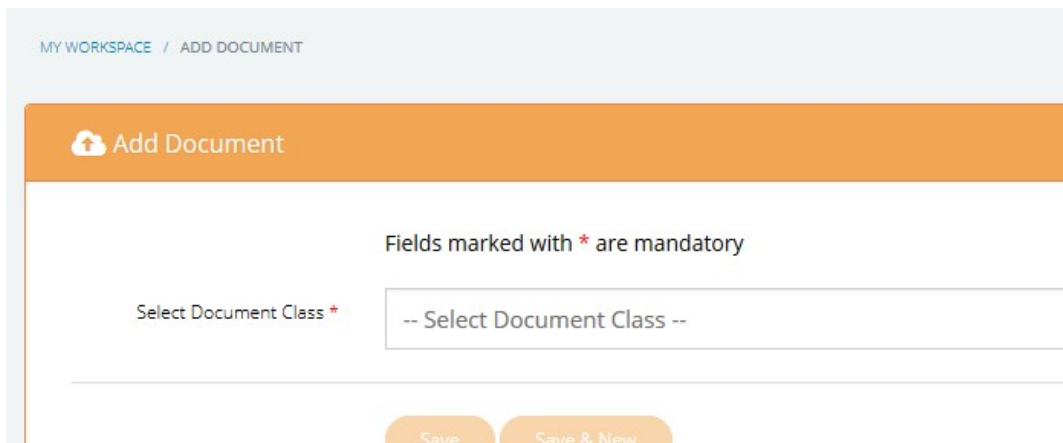


Documents under tags will be grouped together for user viewing.



6.2 Add Document

User can upload documents into InnoShare by “Add document” function. This function locates at left hand side Function List, Top Bar and inside Document Library. User can select available document class for their upload.



After Document Class was selected, an input screen will be displayed. The input fields for document class are according to the document class setup.

Select Document Class * Portuguese

Project* IvanPrj Ivan Project Test

Folder* Folder

Subject *

Description

From Person ABC

Owner Administrator

Preparer* Administrator ABC

Reference No.

Reply To Add reply to

Tag Add a tag

*	is a mandatory field which must input value
Folder	Document stores to user defined folder
Reply To	Document replies to another documents. System will automatic create a relation linkage to targeted docuemnt.
Tag	Document can group by tags. User can input any tag value and system will automatic group tags to gether and display on My Workspace.
Select Document	The actual file for this record. Multiple files are able to upload to same record. System supports different type of files like: office document, PDF, image and video.

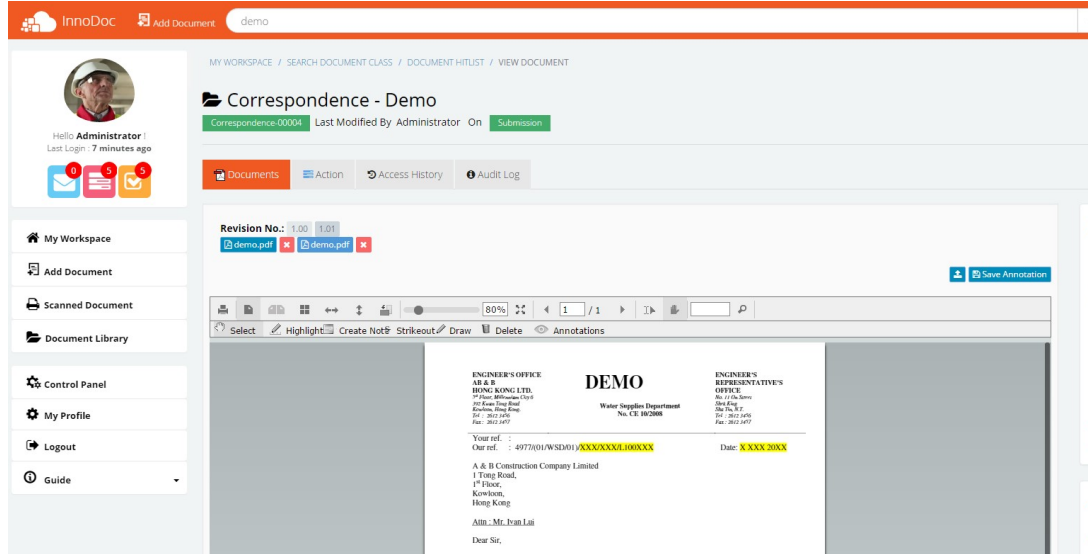
After Document index were fielded. User can press “Save” to complete add document. “Save & New” is to complete the current upload and create a new document with same document class.



6.3 Document Detail

Document Detail is the main display of every document on InnoShare. There are different sections on Document Detail. User can create tags, edit index and assign action on document detail section.


User Guide – Electronic Document Management System




6.3.1 Main Document



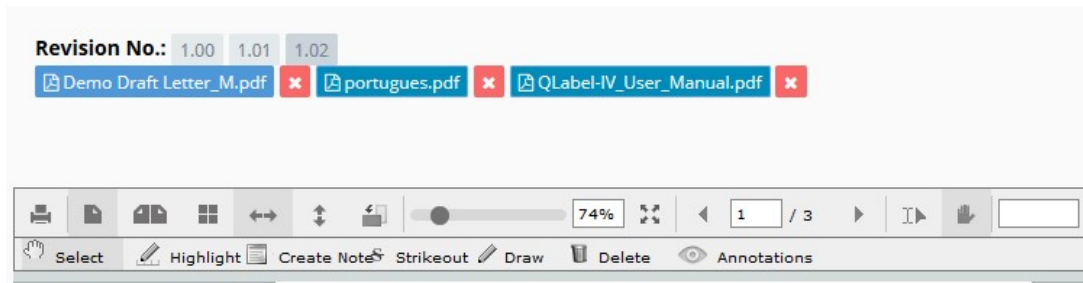
This section mainly view the files on InnoShare. We provided a viewer with drawing function.

User can sketch on the document and press  to store the sketches on everyfile.

6.3.2 Upload New Version


 is upload new file. Documents allow to upload a new file into InnoShare and it will become new version of the original document.

6.3.3 Document Switch

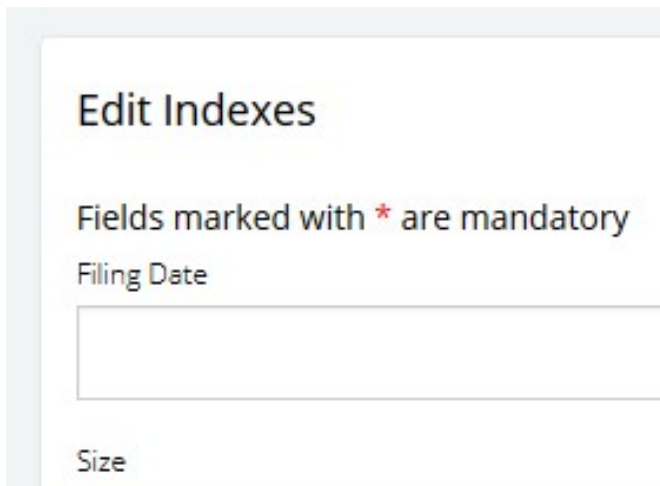


User can view different file on viewer by clicking file subject.

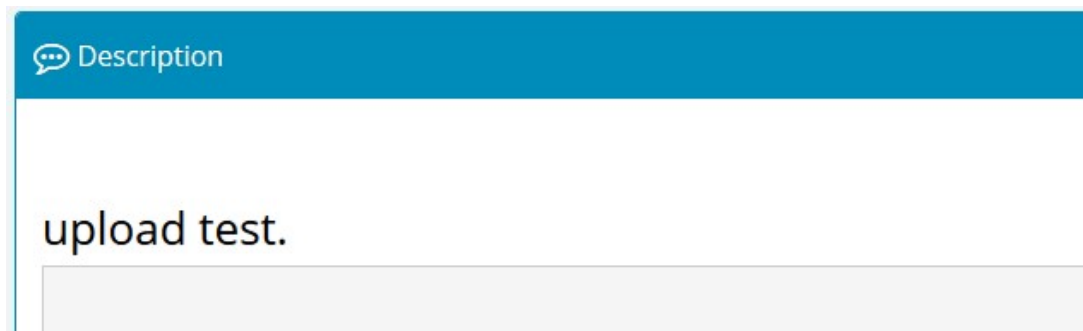
6.3.4 Remove File

 is to remove the viewing file only. Other files on the list will not be removed.

6.3.5 Edit Index



User can edit document index on Document Detail page.



User can edit the Document record subject and description.

6.3.6 Access History and Audit Log



User can click on the Access History and Audit Log to view the document access and audit history.

Access History				
Action	User	Action Date	Type	Comments
View Document	Admin	13-06-2016 17:27:02	Document	View Document[Correspondence-00027]
View Document	Admin	13-06-2016 14:13:18	Document	View Document[Correspondence-00027]
View Document	Admin	13-06-2016 14:13:17	Document	View Document[Correspondence-00027]
View Document	Admin	13-06-2016 14:12:51	Document	View Document[Correspondence-00027]

Access History							
User	Action Time	Action	From Company	To Company	From Person	To Person	Purpose
King Chau	2016-05-09 14:30	ADD	Innovative Associate technology Ltd.	Win Growth Ltd.	King	Hugo	
King Chau	2016-05-09 15:55	MODIFY	Innovative Associate technology Ltd.	Win Growth Ltd.	King	Hugo	
Joseph Ting	2016-05-10 11:40	MODIFY	Innovative Associate technology Ltd.	Win Growth Ltd.	King	Ivan	

6.3.7 Download and Delete Document

User can download document by clicking



: Download all documents

User with delete right can delete this document




: Delete all documents and current record.

6.4 Create Message, Task

User can send Message, Task and Workflow on InnoDoc at view document “Assign Action” section.

Assign Action

-- Choose Approval --

 Action Title

Assign To

Due Date

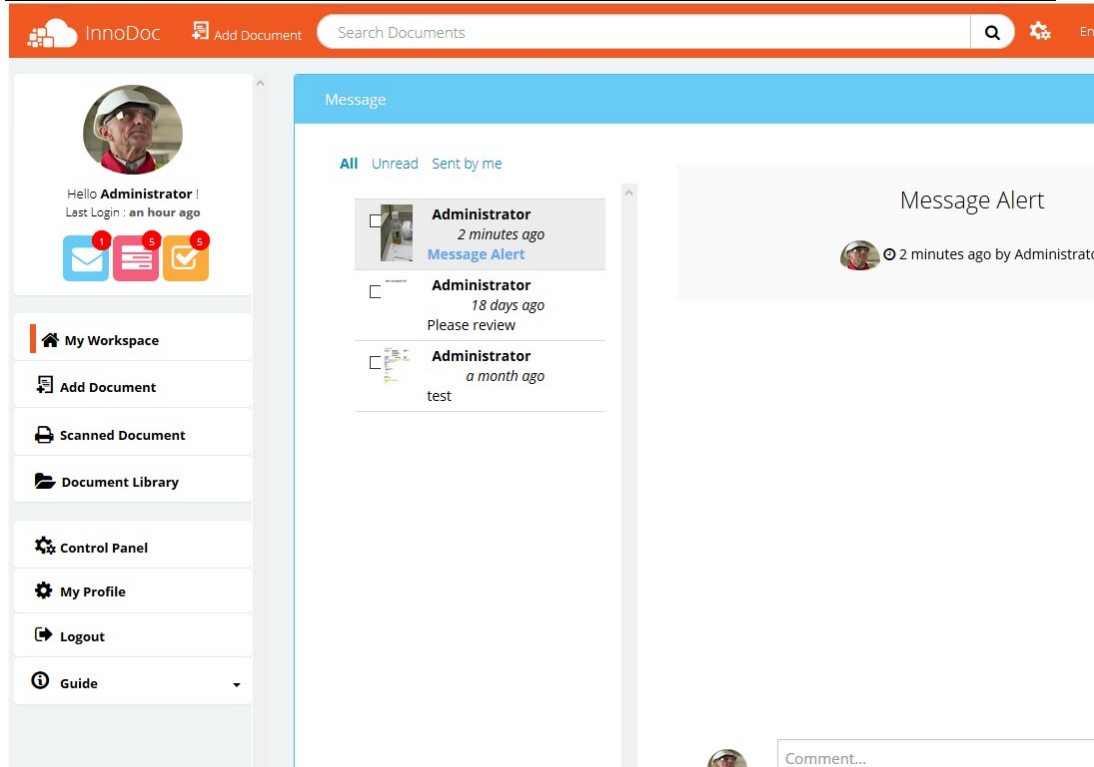
User can enter “Action Title” and select “Assign To” to send out “Message” to InnoDoc Users. The message will show on their “Message” folder.

User can enter “Action Title” and select “Assign To” and enter “Due Date” to send out “Task” to InnoDoc users. The task will show on their “Task” folder.

6.5 Message

You can see the documents that you have circulated to other users. By clicking the “Message” icon in the Function List, the documents will show on the right-hand side in the Result List.

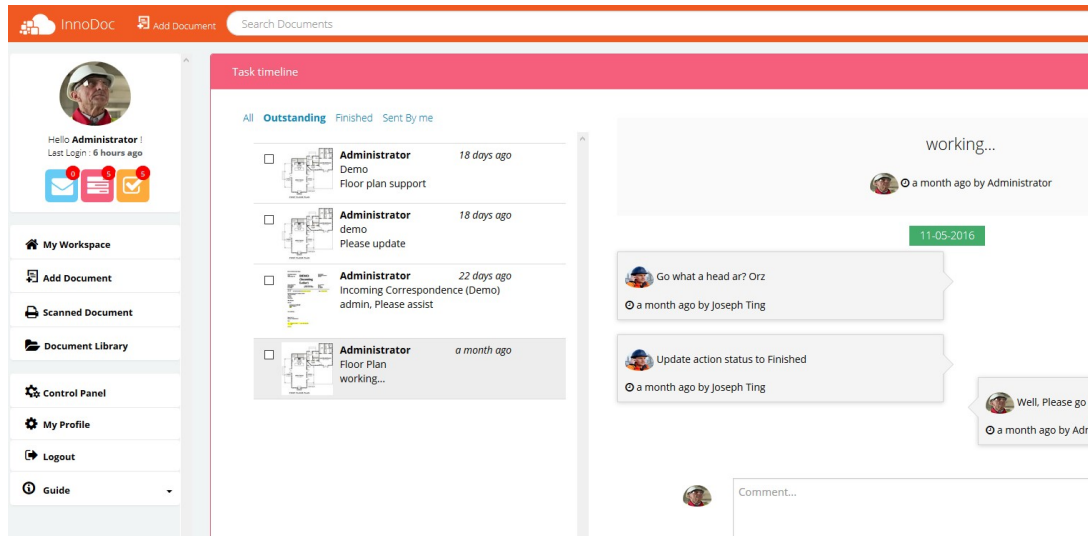
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Message	 <p>User can click  to view messages. The red circle indicate the unread messages from InnoDoc.</p>
All/UnRead	User can view all messages or only view unread message
Sent by me	Messages are sent by me
Post	User can make comments on every messge and click "Post" to send out.

6.6 Task

The task session allows user to manage the task assignment related to the documents in InnoShare. This area shows the tasks that other users have assigned you to do. You can also select the status to see different status of tasks including outstanding and finished or all tasks. By default you will see the outstanding task in the task list view.



Task	 <p>User can click  to view tasks. The red circle indicate the outstanding task from InnoDoc.</p>
All/Outstanding/Finished	User can view all task, outstanding task or finished task.
Sent by me	Tasks are sent by me
Post	<p>User can make comments on every task and click “Post” to send out.</p> <p>User can set status on every task.</p> <p>New- Task is outstanding and will show on Outstanding view.</p> <p>In Progress – Task is in progress and will show on Outstanding view.</p> <p>Finished – Taks is finished and will show on Finished view.</p> <p>User can upload document on task page by dropping documents in “Drop fine to upload” block.</p>

6.7 My Profile

My Profile shows user profile. You can change your password by clicking Change Password in My Profile. The default password for each user account will be 'password'.


MY WORKSPACE / MY PROFILE

My Profile Change Password

User Name Administrator

Real Name Admin

My Profile Picture



Email ID webadmin@wgtestmail.com

Last Login Date 13-06-2016 10:52:09

Submit

You can then input your original password and enter your new password twice. After clicking 'Confirm Change' the new password will then update and activate.

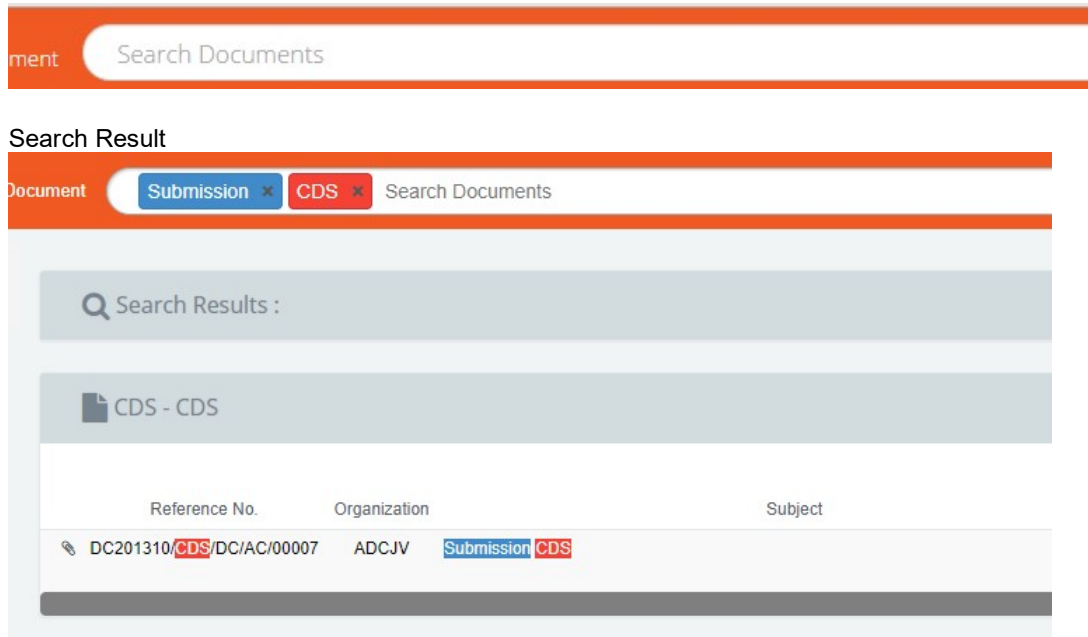
7 Document Search

You can search documents in two different ways:

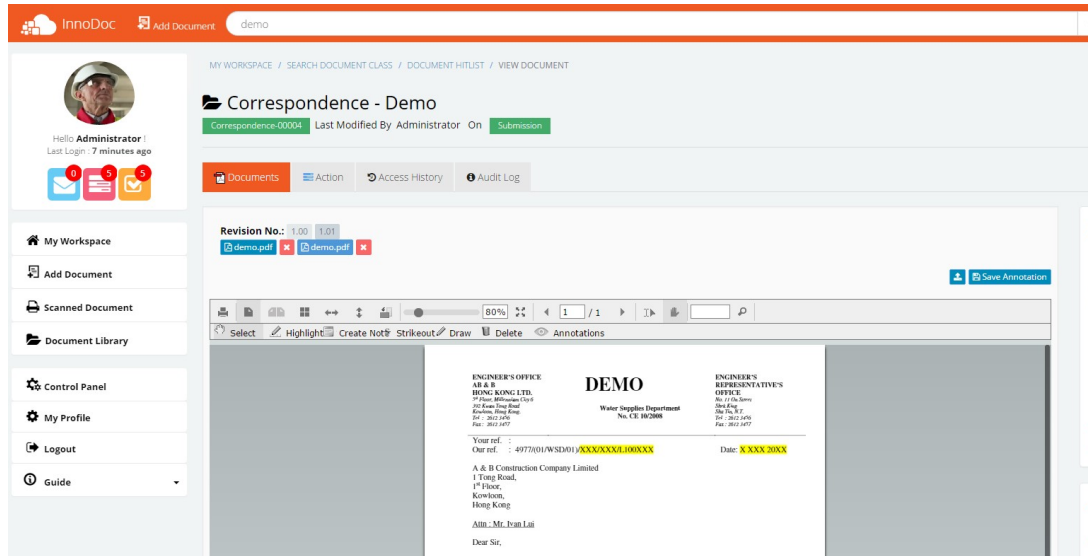
1. Full text search
2. Simple Search

7.1 Full text search

If you only know the keywords of the document, you can use the full text search which is the easiest way to find document. By simply enter the keyword in the text box at the top bar and you press enter, the search result will display in a new window. The searching will include subjects, document content and user defined fields.

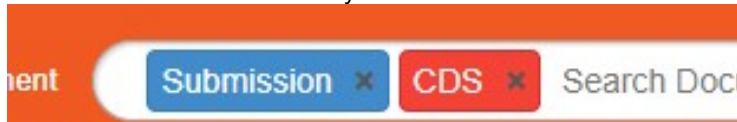


Search result will show all the documents which matched search criteria by document class. User can click View Document to view the document.



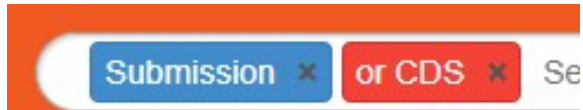
Searching Options on Full Text search

1. User entered search keyword on Full Text search box. InnoShare will search documents contain entered keywords.



InnoShare will search documents contain “Submission” and “CDS”.

2. User can use “OR” to search documents



InnoShare will search document contain “Submission” or “CDS”

3. User can use exactly match on Full Text Search



InnoShare will search documents only contain “Submission CDS”.

Export search result

Users are able to export the search result into Excel by clicking “Export Excel” at search result page.

MY WORKSPACE / SEARCH RESULTS

Search Results : letter

Letter IN - Letter incoming

Document No	Revision No.	Organization	Subject	RecDate	DMS Barcode	Ref. No.	Letter Date	Issuer	Con
Letter IN-00008	1		COMMENTS - SHOP DRAWING SUBMISSION OF FALSE CEILING OF TOILET FOR OFF SITE MOCK UP	2016/07/22	2016Y026573		2016/07/21	ATELIER PACIFIC LTD	SHOP E SUBM

An excel will be generated automatically. The excel will contain different excel sheets and each sheet will be one InnoDoc document class if the search result hits more than one document class.

	A	B	C	D	E	F	G
1	Document No	Revision No	Organization	Subject	Size	Filing Date	Document Date
2	Correspondence-00002	1	CEDMS/2016/06/04	demo		23-06-2016	23-06
3	Correspondence-00003	1	CEDMS/2016/06/04	Demo		23-06-2016	23-06
4							
5							

7.2 Simple Search

Every time when user login to InnoShare, System will direct the user to My Workspace screen. If you know more detail information about the document you want to search, you can click “Search” under the document class to find the document.

The screenshot displays the 'Correspondence' document class search interface. At the top, it shows '27 Documents' and navigation options: 'View All (27)', 'Search', and '+ Add Documents'. Below this is a breadcrumb trail: 'MY WORKSPACE / SEARCH DOCUMENT CLASS' and 'Correspondence - Correspondence'. The main section is titled 'Available Indexes' and contains the following search filters:

- Subject: Text input field with 'ABC' placeholder.
- Project: Dropdown menu with '-- Select All --'.
- Filing Date: Text input field with a calendar icon.
- To Filing Date: Text input field with a calendar icon.
- Size: Text input field with 'ABC' placeholder.
- Document Date: Text input field with a calendar icon.
- To Document Date: Text input field with a calendar icon.
- From Company: Text input field with 'ABC' placeholder.
- From Person: Text input field with 'ABC' placeholder.
- To Company: Text input field with 'ABC' placeholder.
- To Person: Text input field with 'ABC' placeholder.