eOffice
A DIGITAL WORK PLACE SOLUTION

KMS

Knowledge Management System
(User Manual)

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Amendment Logs

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Introduction

Knowledge Management System controls the life cycle of documents of an organization —i.e. how they are created, reviewed, published, and used. Although the term "**management**" implies top -down control of information, an effective knowledge management system should reflect the culture of the organization using it. The tools used for knowledge management should be flexible, allowing to tightly controlling documents' life cycles should not just fits organization culture and goals, but also letting to implement a more loosely structured system.

A well-designed knowledge management system promotes finding and sharing information easily. It organizes content in a logical way, and makes easy standardize content creation and presentation across an organization. It provides features at each stage of a document's life cycle, from template creation to document authoring, reviewing, publishing, auditing, and ultimately archiving.

Objective

Under Government bodies, large volume of documents of various categories are managed and circulated .These documents can be Policies, Forms, Acts and Regulations, Circulars, Guidelines etc. In former scenario, these large volumes of documents were maintained in hard copy and multiple copies were circulated among the various departments. Maintaining such a large volume of data was troublesome and laborious; therefore after few years these documents were either misplaced or trashed by the departments as there was no mean for keeping such large information for prolong usage.

To address the above situations, KMS application of eOffice was shaped, which has a single repository of documents from where all department/ministry users can access the information.
eOffice KMS enables users to create and manage electronic documents that can be viewed, searched and shared. It is also capable of keeping track of the different versions of modified documents by different users (Tracking history). It also contains a dynamic workflow to keep document in various stages.

What Knowledge Management System Offers in eOffice?

With Knowledge Management System you can easily create, upload, share, and edit documents online.

Here are a few specific things you can do:

- Upload DOC, PDF, HTML or plain text documents, can create documents from scratch, and download them.
- Edit documents online simultaneously with anyone you choose, and invite others to view them.
- Can create documents using an advanced online editor.
- Can create links.
- Folder subscriptions for easy navigation.
- Centralized document repository with folder wise categorization.
- Can keep track of changes made to the document by whom and when. Also, users can roll back to any version.
- Publish documents online to other users.
- Uploading of new images and videos and can edit, share with anyone.
- Manage subscriptions and sharing of docs.

Roles & Rights for a User Role

User Created Document

All the privileges assigned to User depend upon the KMS Administrator. The privileges assigned to **Users** are:

a) Can Create Document/Folder/ Online Document/ Link in My Docs Folder.
b) Can View Document/Folder/ Online Document/ Link.
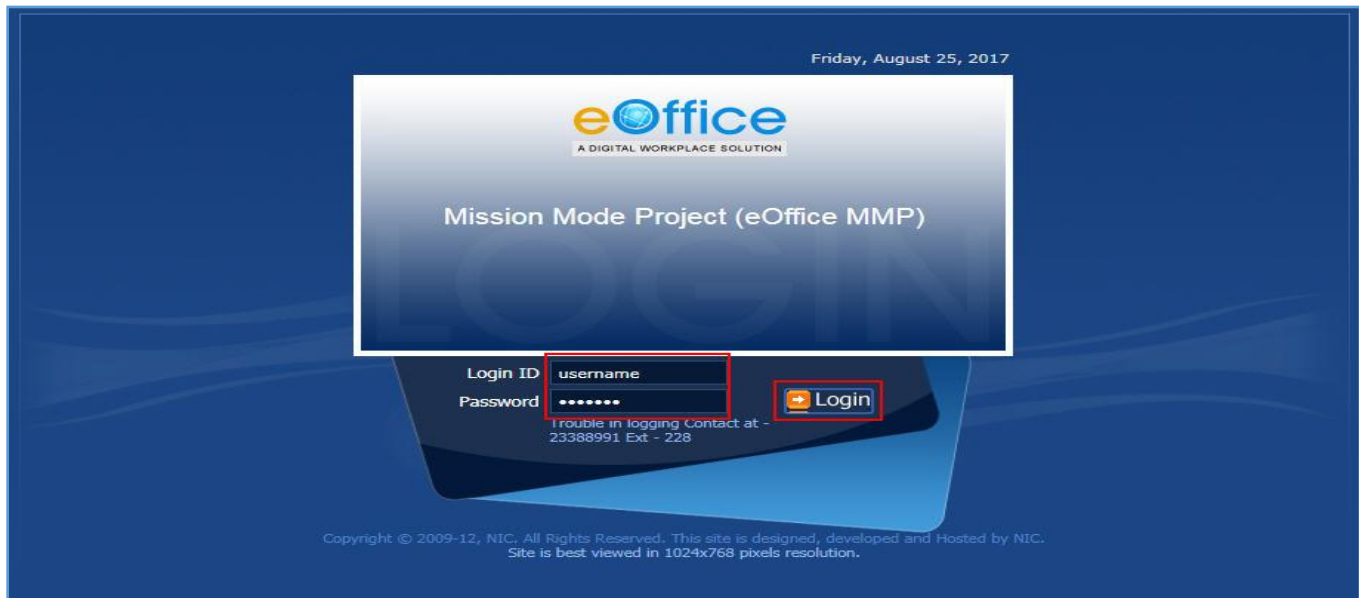c) Can Edit/Modify a Document/Folder/Link.

Change State Rights

1. Private State (Default State)
2. Submit for Publication
3. No Change (Current State)
4. Reject (in case user have edit, review permission)
5. Retract (in case user have edit, review permission)

Login

- Enter the **Login ID** & **Password** in the eOffice portal, click ![Login] button as shown in **Fig.1**

Fig.1

- eOffice homepage is displayed on successful login.

- To open the **Knowledge Management System**, click the link mentioned in the left panel as highlighted in **Fig.2**:
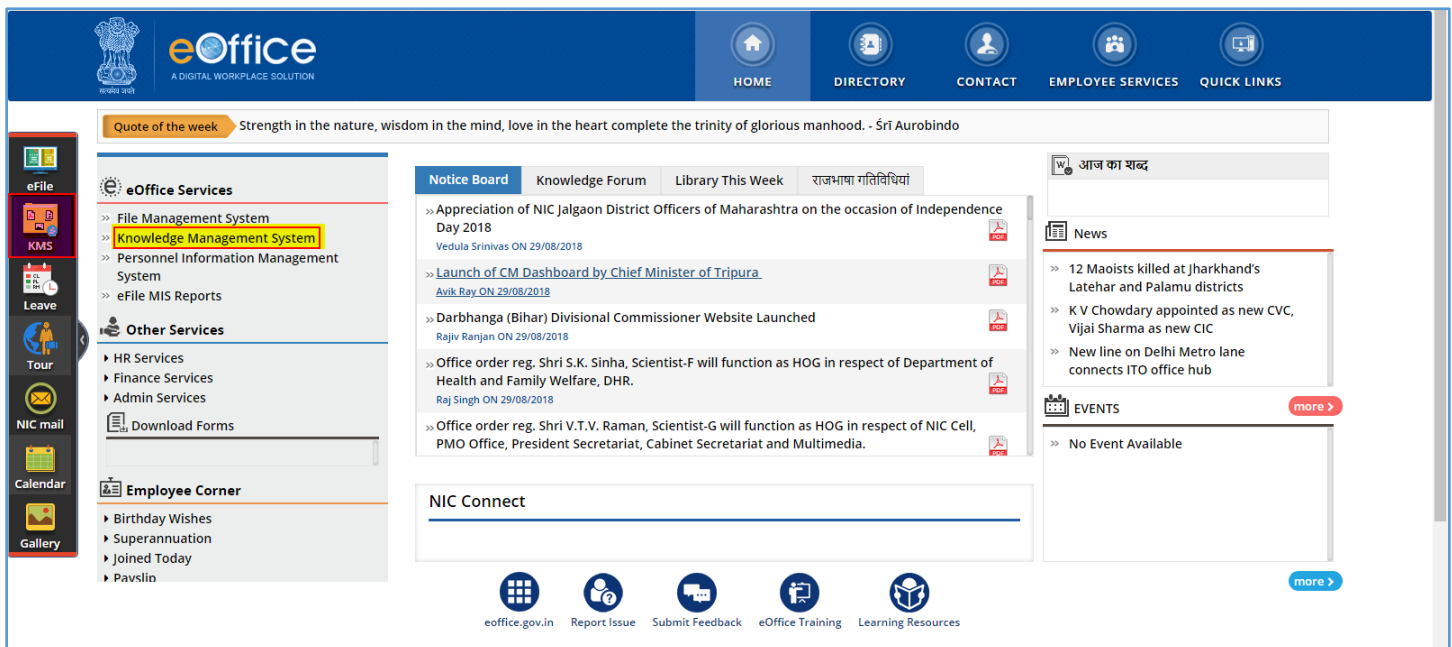
Fig.2

- User is then redirected to the application, as shown in **Fig.3**
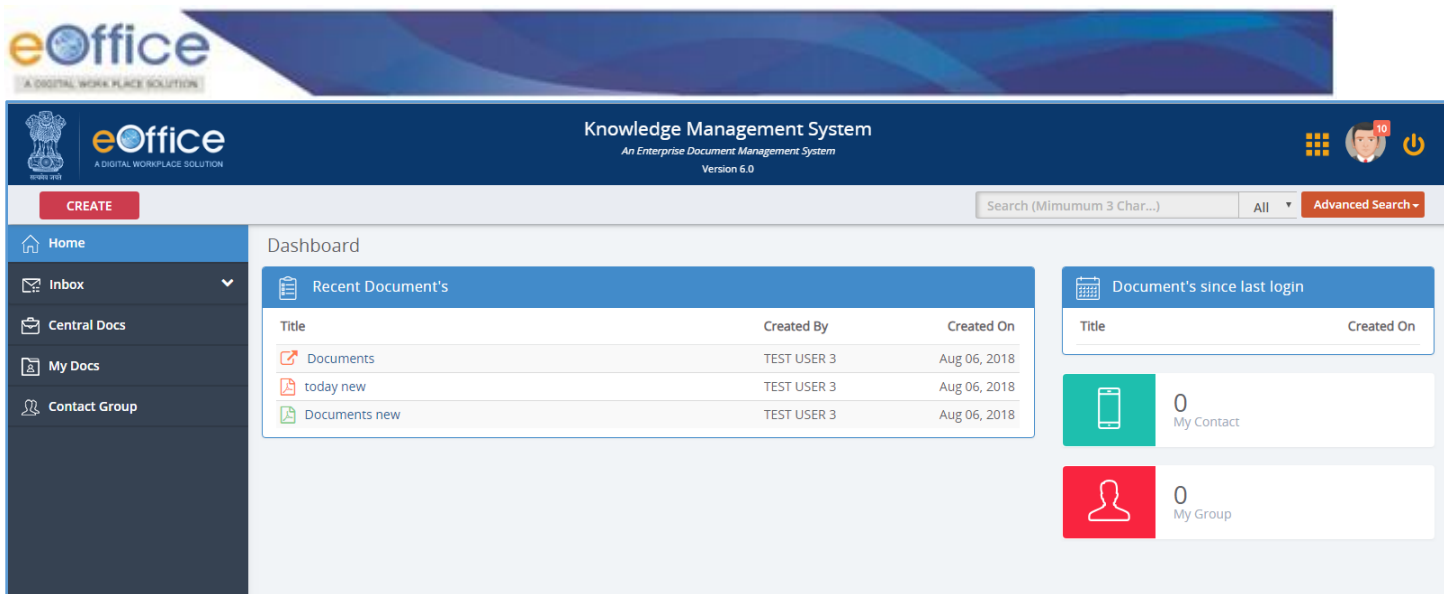
Fig.3

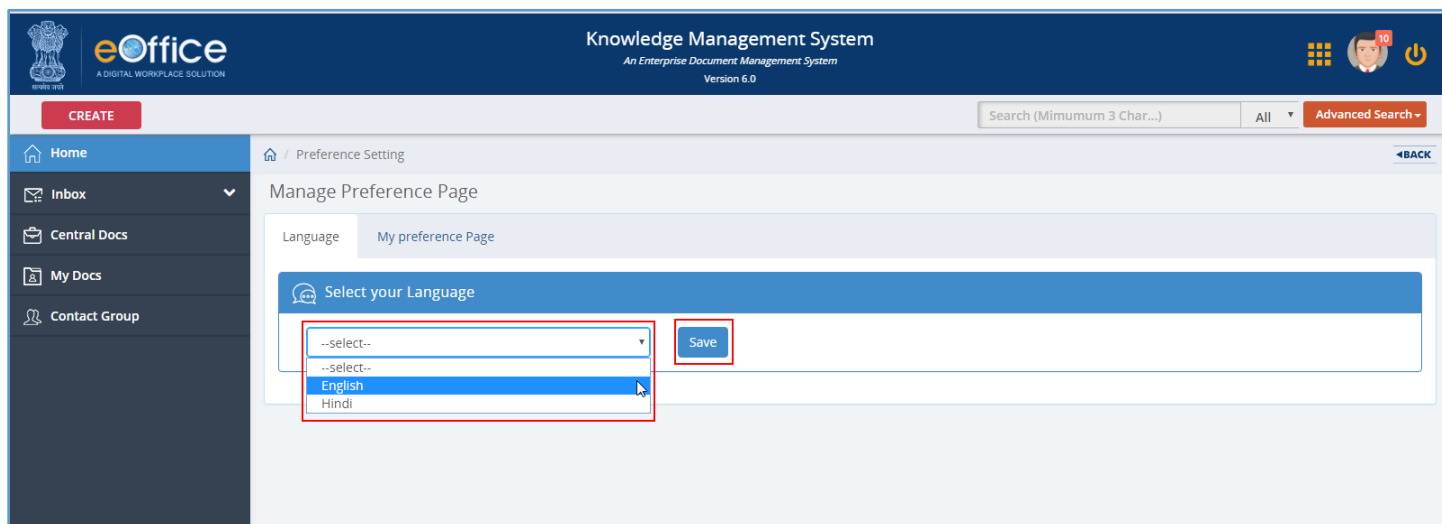- Click the more icon, to switch to any other application, as shown in **Fig.4:**
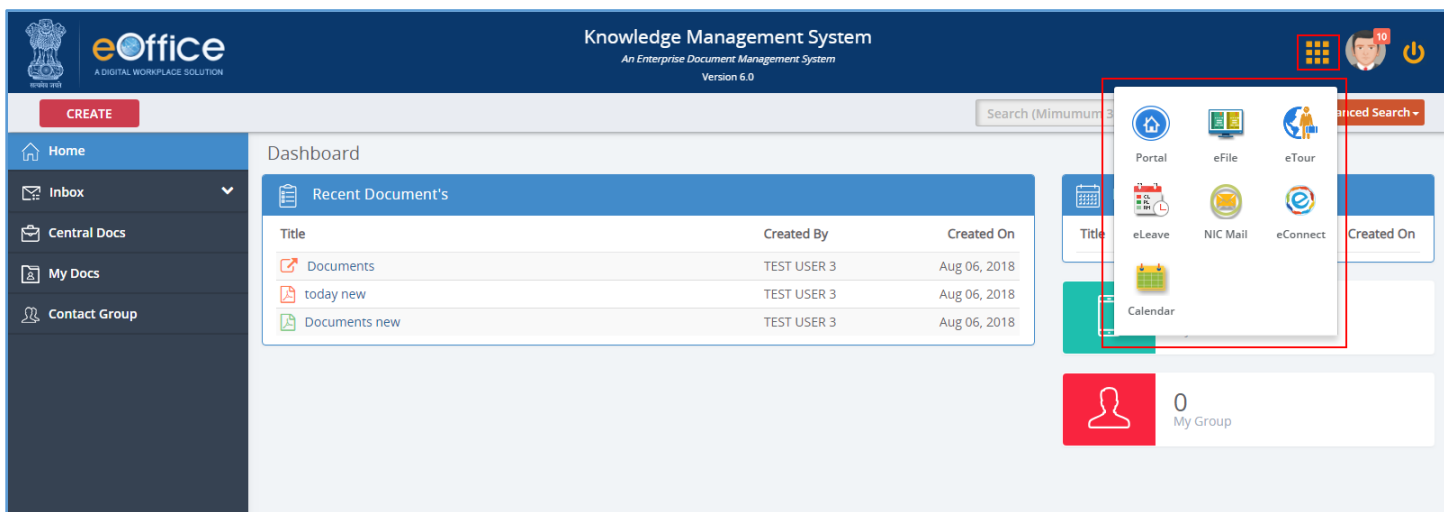
Fig.4

- Click the **User Icon→Home Page Settings** link to change the Language and Preference Page, as shown in **Fig.5:**
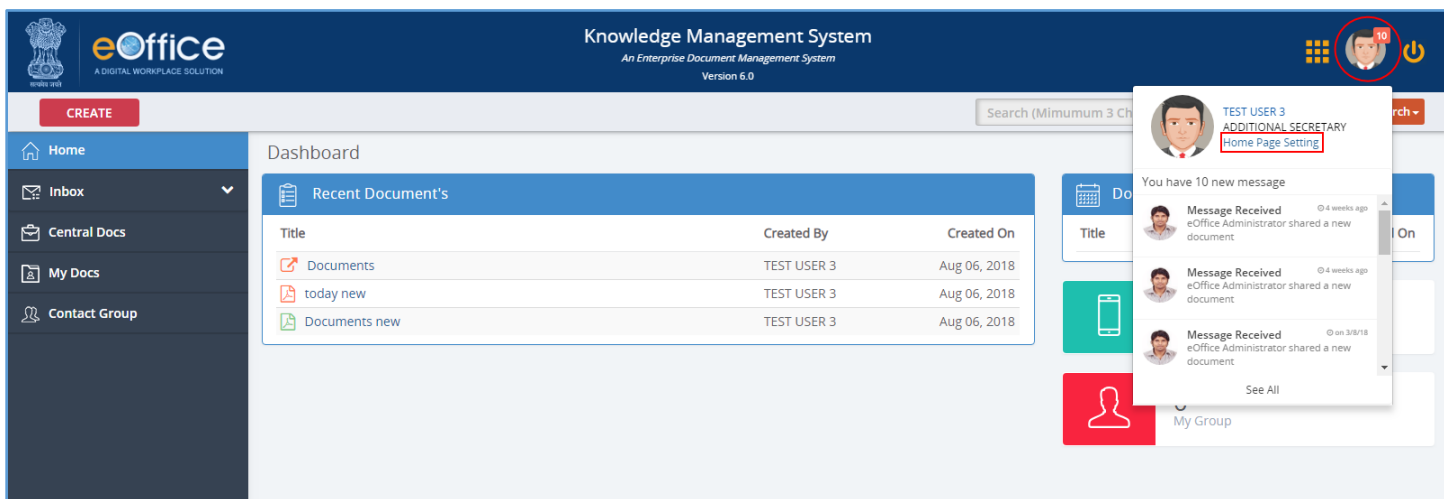
Fig.5

- The Manage Preference page appears, select the language and preferences and click ![Save] button, as shown in **Fig.6 & Fig.7**:

Fig.6
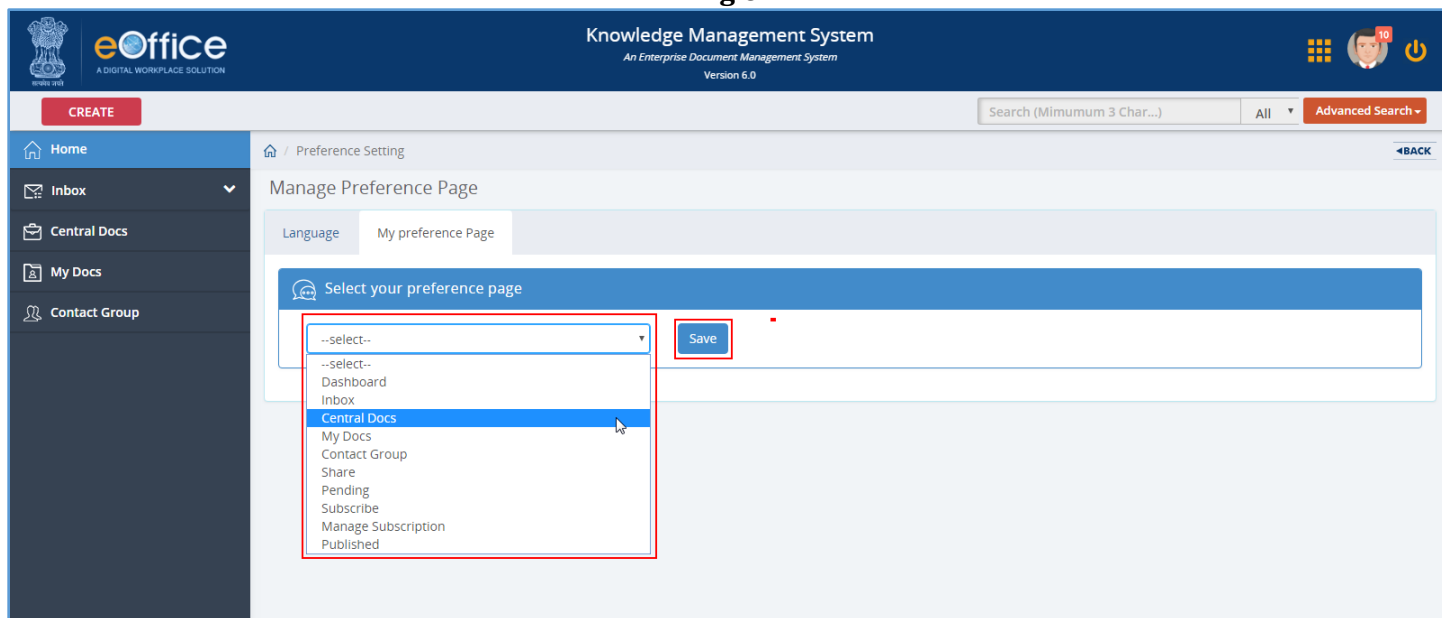
Fig.7

- After changing the language & preference, on successful login the selected preference page in selected language will appears.

Create

This module is used to create a Document, Online Documents, Link and Folders.

A user can create

- Multiple Document
- Document
- Folder
- Link
- Online Document

Let's learn about these modules one by one:

Multiple Document

It is used to upload multiple documents.
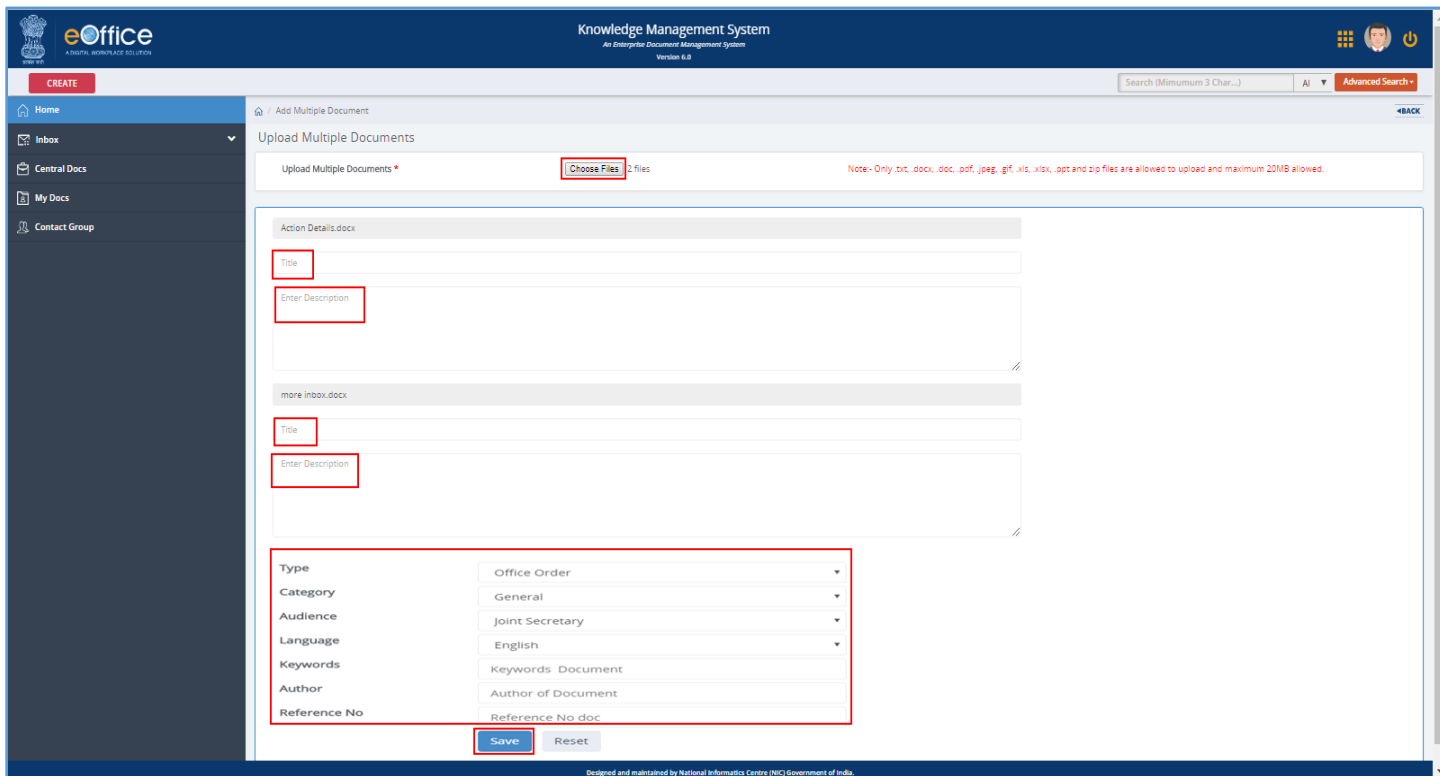
The steps to upload multiple documents are mentioned below:

- Click on **Create** (CREATE) button to upload multiple documents.

- Click on **Multiple Document** option from the menu bar.

- **Upload Multiple Document** page appears, click on **Choose Files** (Choose Files) button to upload the files as shown in **Fig.8**:
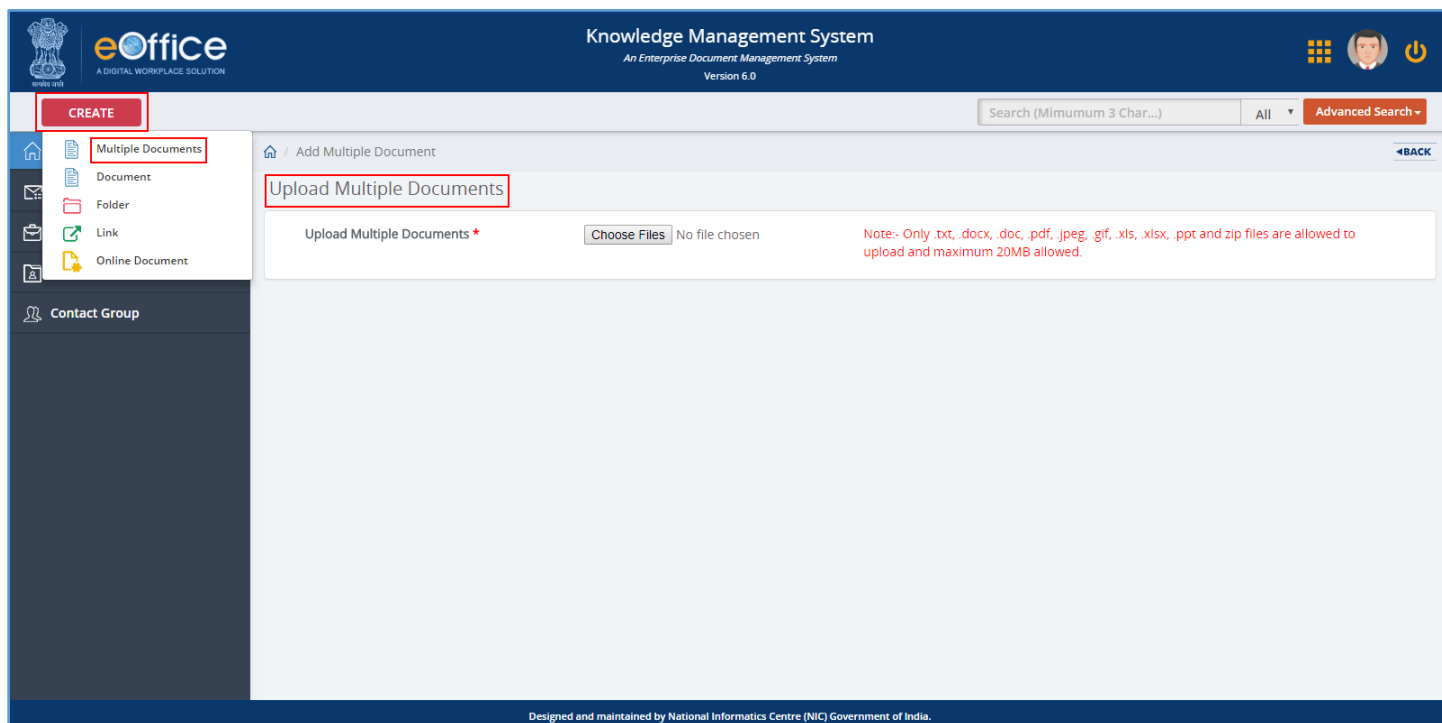
Fig.8

- Enter the **Title, Description and other details** for all the documents in the text fields and click on the **Save**
  (Save) button as shown in **Fig.9:**

Fig.9

Note:
a) "Title", "Description" and "File upload" are mandatory fields and should not be left blank.
b) Files to be uploaded must be in .txt, .docx, .doc, .pdf, .jpeg, .gif, .xls, .xlsx, .ppt and zip format only.

Document

It is used to upload a document.

The steps to create a document are mentioned below:

- Click on **Create** (CREATE) button to create a Document.

- Click on **Document** option from the menu bar.

- **Add Document Details** page appears as shown in **Fig.10**:

Fig.10

- Enter the description in the text fields and click on **Choose File** (Choose file) button to upload the file and click on the **Save** (Save) button to save details, as shown in **Fig.11:**
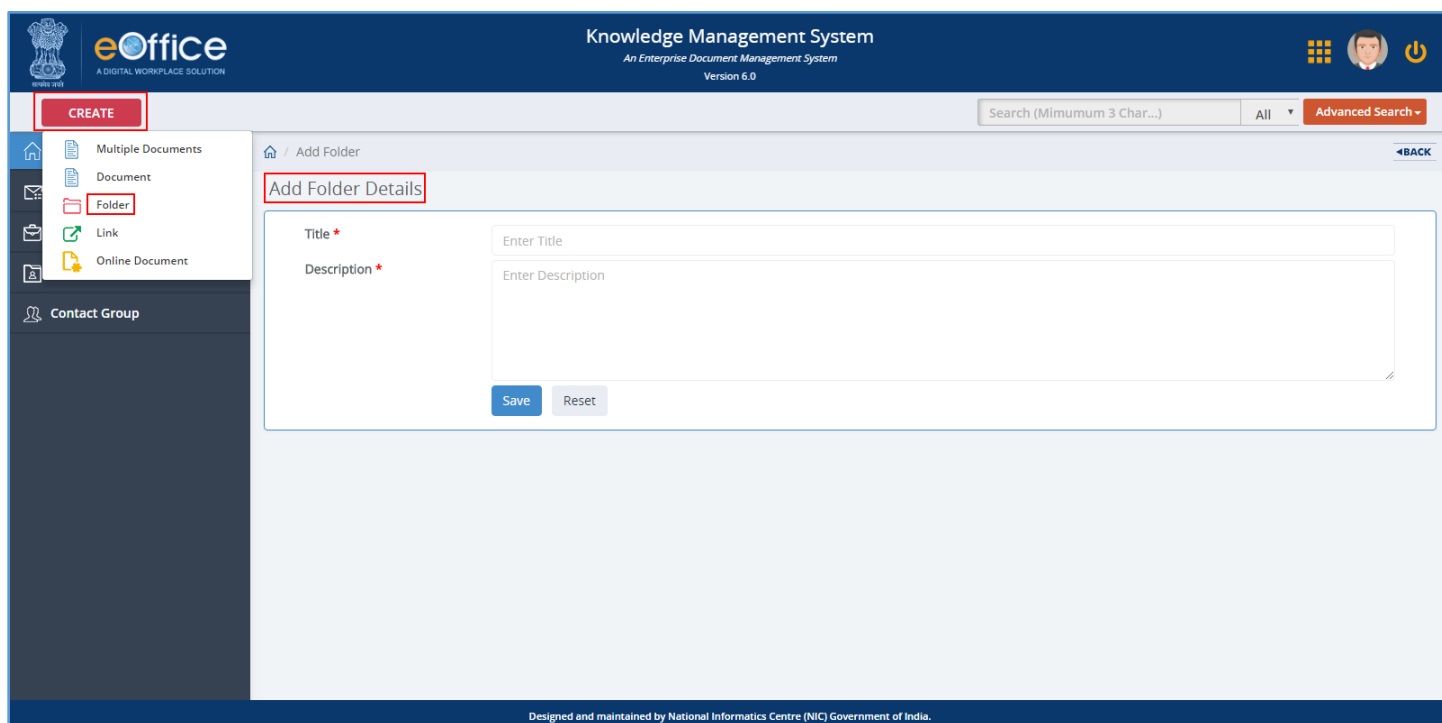

Fig.11

Note:
a) "Title", "Description" and "File upload" are mandatory fields and should not be left blank.
b) Files to be uploaded must be in .txt, .docx, .doc, .pdf, .jpeg, .gif, .xls, .xlsx, .ppt and zip format only.

Folder

It is used to create new folder.

The steps to create a Folder are mentioned below:

- Click on **Create** (CREATE) button to create a Folder.

- Click on **Folder** option from the menu bar.

- As a result, **Add Folder Detail** page appears as shown in **Fig.12:**

Fig.12

- Enter the **Title** and **description** in the given text field and click on **Save** (Save) button as shown in **Fig.13:**

Fig.13

> Note:
> "Title" & "Description" are mandatory field and can't be left blank.

Link

It is used to create a new link.

The steps to create a Link are mentioned below:

- Click on **Create** (CREATE) button to create a Link.

- Click on **Link** button from menu bar.

- As a result, Add Link Details page appears as shown in **Fig.14:**

Fig.14

- Enter the Link details and click on **Save** (Save) button as shown in **Fig.15:**

Fig.15
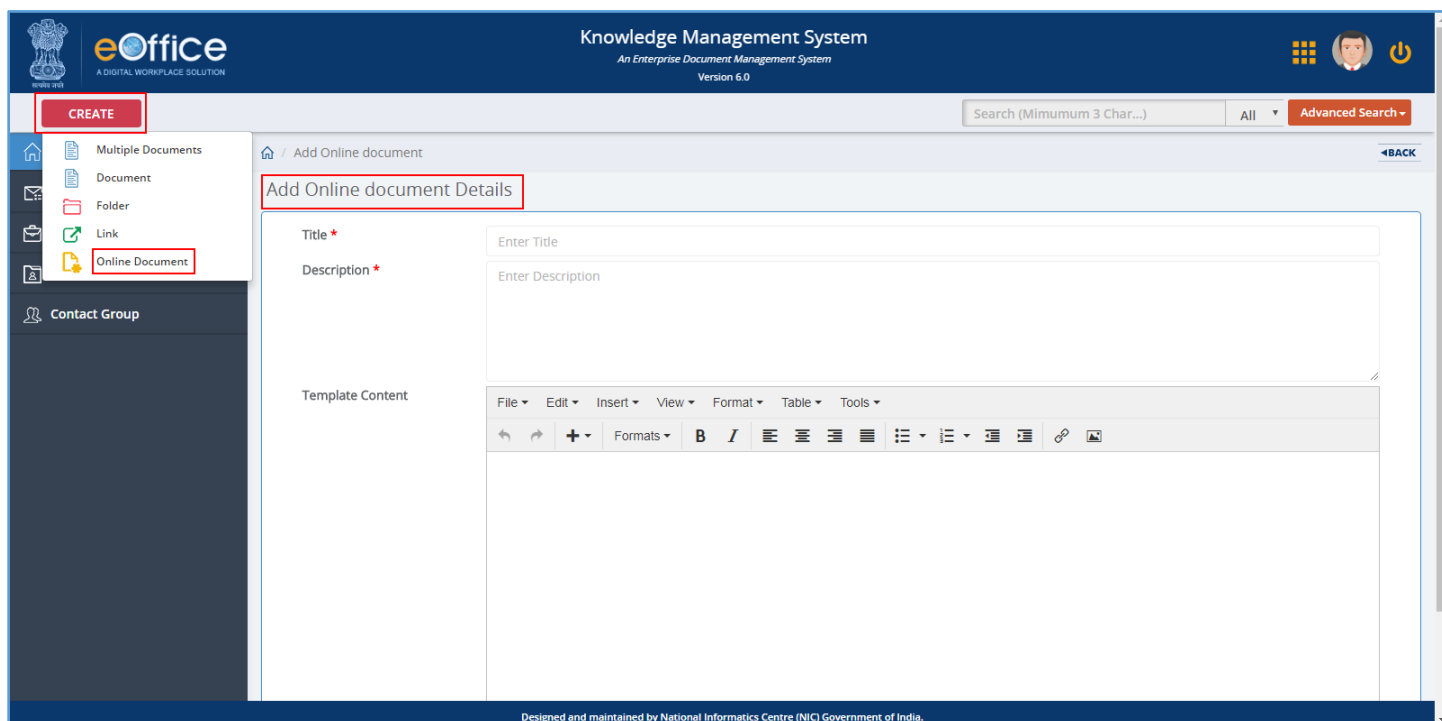
Note:
"Title", "Description" and "Link url" fields are mandatory fields and should not be left blank.

Online Document

It is used to create an online document. It has a feature of online editor to set the font, color of the document content alignments etc.

The steps to create an Online Document are mentioned below:

- Click on **Create** (CREATE) button to create an Online Document.

- Click on **Online Document** option from the menu bar.

- The **Add Online Document Detail** page appears as shown in **Fig.16:**

Fig.16

- Enter the description in the text fields and add the content of the Online Document and click on **Save** (Save) button as shown in **Fig.17:**
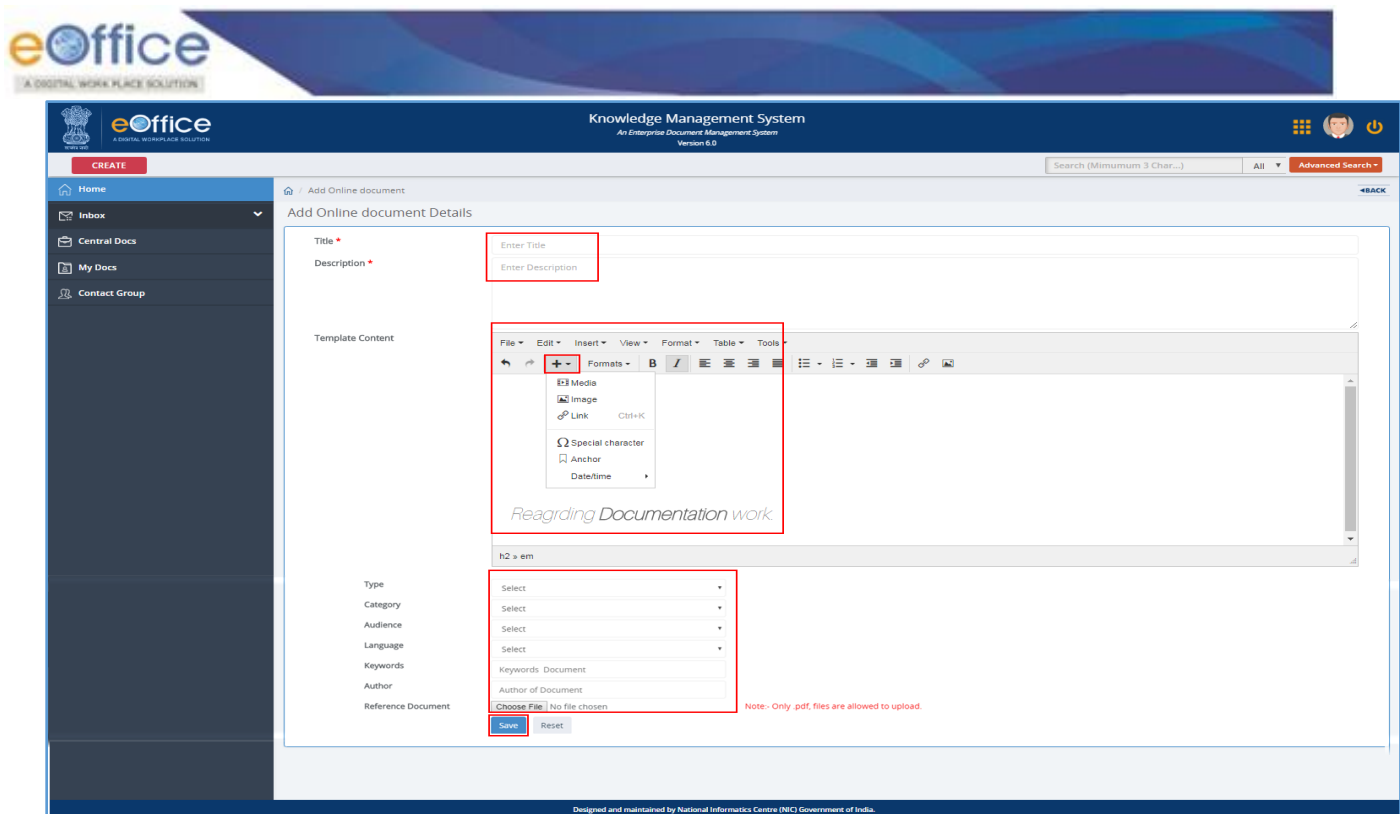
Fig.17

Note:

a) On clicking on Other Details ( ) button a user can add more details to an online document, such as Media, Image, Link etc.

b) User can format the content of the online document by the Online Editor.

# Viewing Right for the uploaded or saved Document/ Folders/ Link/ Online Document:

After uploading or saving a document, privileges are assigned to the Document/Folder/Link/ Online Document. The Privileges or Viewing Rights for a Document/Folder/Link/ Online Document are as under:-

No Change

The document will remain in Default state or Private state and can only be view by the owner who has created the document.

> Note:
> By Default, a Document/ Folder/ Link/ Online Document is in the "Private State" or "No Change" state unless a user assigns a different privilege to the document.

Submit for Publication/ Making Visible:

When the document is submitted for publication the state changes to 'pending' and can edited and reviewed by admin or reviewer. Once the admin published the document or make visible, then the document can be viewed by the all users and is available on the notice board as well.

Search

It is used to search any kind of Document/ Folder/ Online Document/ Link whether it is text file, doc file, pdf etc.

> Note:
> To access the Search, minimum of 3 characters are required.

Advance Search

It is used to search Document/ Folder/ Online Document/ Link using fields like Title, Type, Category, Description, Language, Audience and Keywords etc. shown in **Fig.18:**

Fig.18

General User Module

General User Module has five sections:

1. Home
2. Inbox
3. Central Docs
4. My Docs
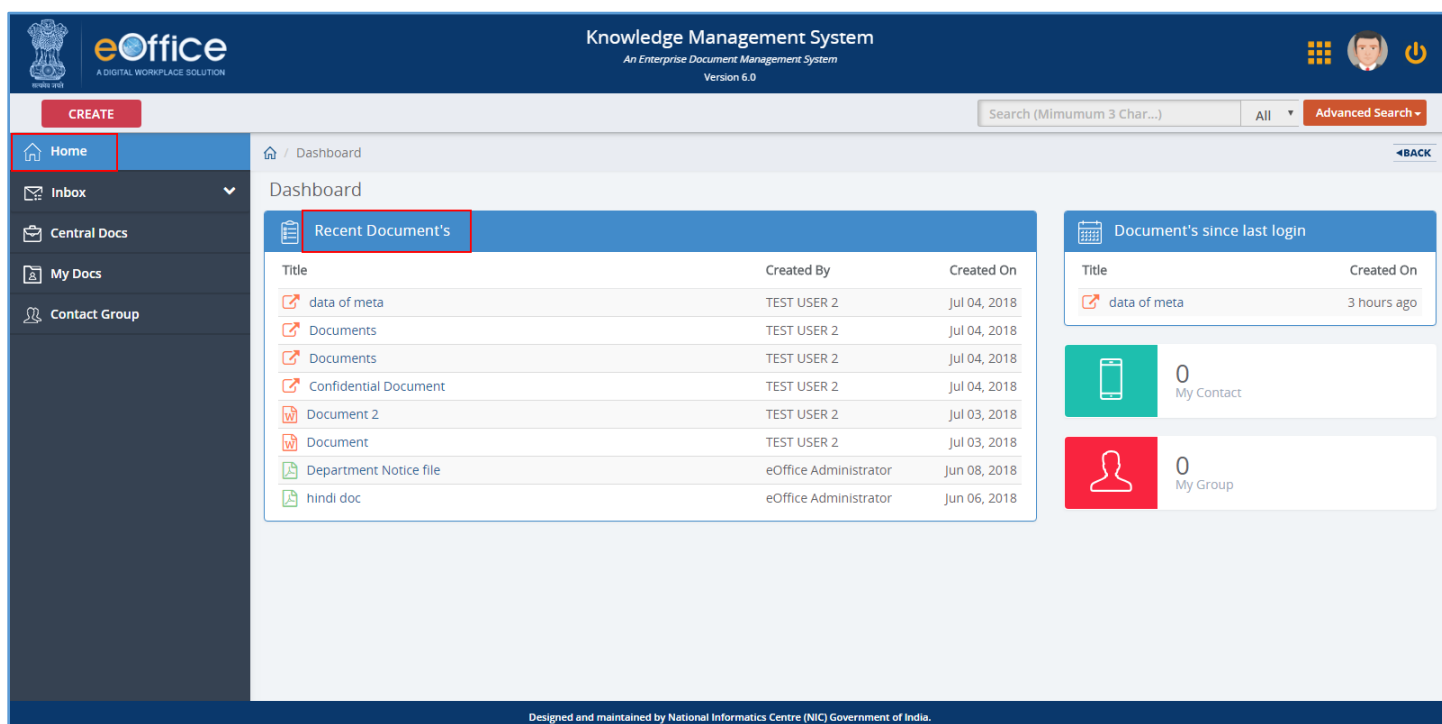5. Contact Book

Let's learn about these sections one by one:

Home

Recent Document's: It contains the 10 recent Documents/ Online Document/ Links created or modified by the logged in user, those shared with the logged in user and are published by the admin, as shown in **Fig.19**:

Document since last login: It contains the document created since last login.

My Contact: Number of users added by the user in contact section.

My Group: Number of groups that are created by the user.

Fig.19

Inbox

Different sections available under Inbox are shown in **Fig.20:**
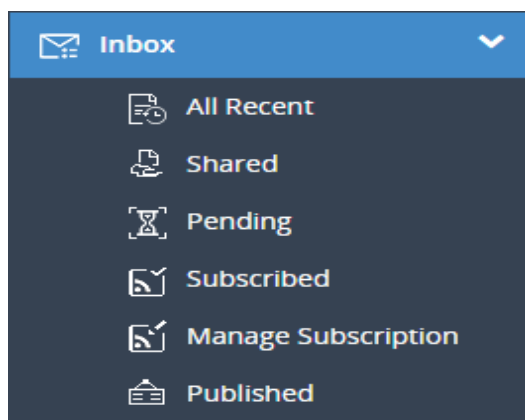
Fig.20

Let's learn these modules one by one.

All Recent

It contains the Document/ Online Document/ Files (inside Folder)/ Links that are created under 'My Docs' and those which are in published or in visible states (within 30 days).

Note:
In All Recent section, a user can't view created folder and can only view & access files created under a folder.

Shared

It contains the Documents/Online Documents/Folder or Links that are shared with and by the logged in user.

Pending

It contains the Documents/Online Documents/Links that are in pending status i.e. the documents which are not published yet (pending state).

Subscribed

It contains the Subscribed Files of Folders and Subscribed Documents/Online Documents/ Links, so if any change is done in those files user(s) can view them.
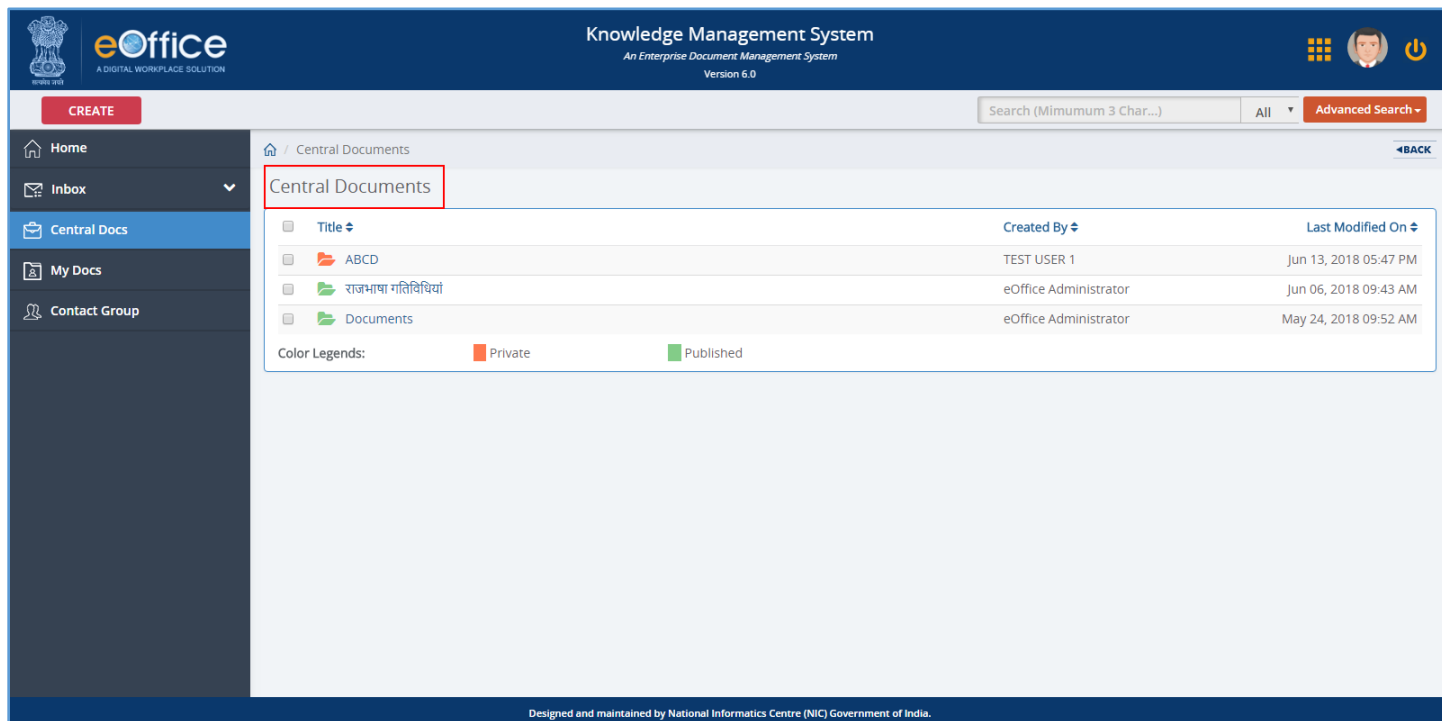
Manage Subscription

It is used to unsubscribe the subscribed Documents/Folders/ Online Documents/ Links.

Published

It contains the Documents/Folders/ Online Documents/ Links which are already published.

Central Docs

It is a public library which contains the Documents/ Folders/ Links/ Online Documents that are created and are published/ visible, shown in **Fig.21**.
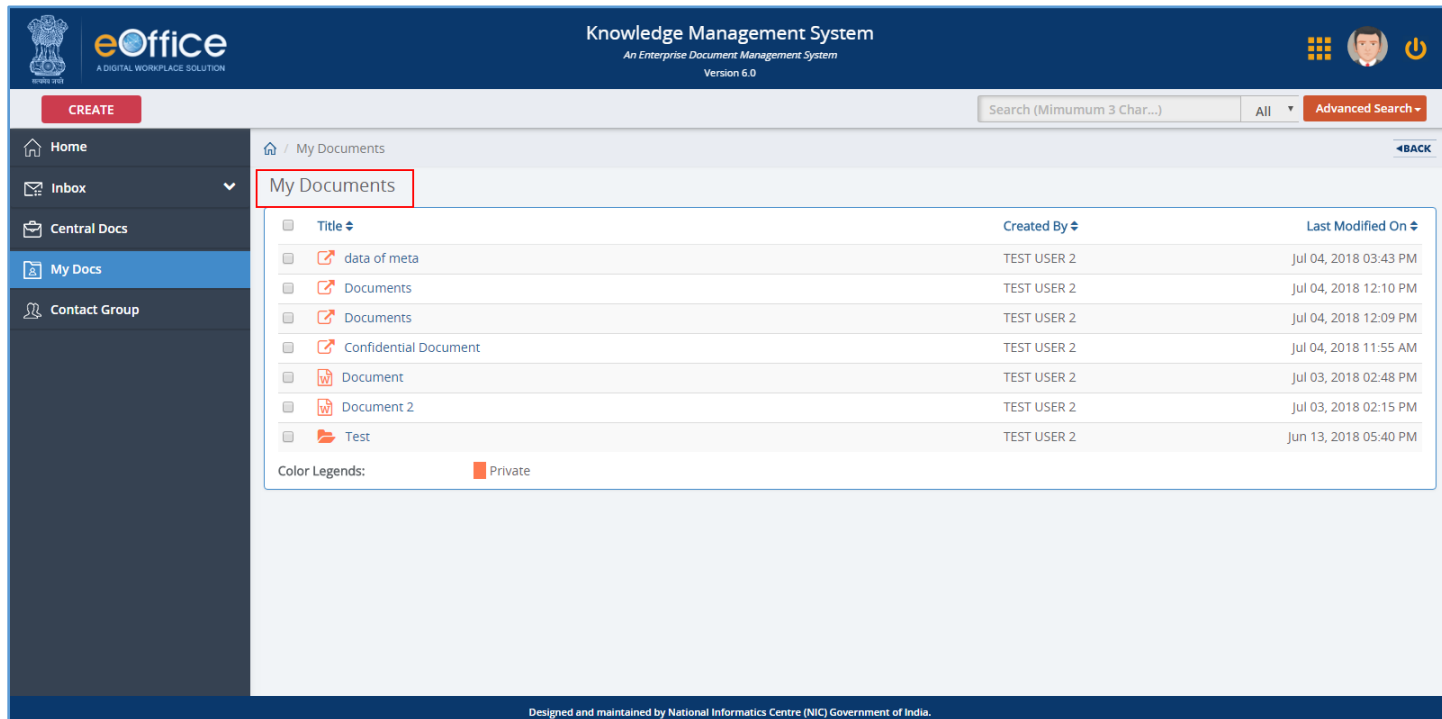

Fig.21

Note:
Only Admin can create Document/Folder/Link/ Online Document in Central Docs.

My Docs

It is a user personal library which contains all Documents/ Folders/ Links/ Online Documents created by the logged in user, as shown in **Fig.22:**

Fig.22

The steps to create a Documents/Online Documents/Folder or Links in My Docs are mentioned below:

- Click on **My Docs** (My Docs) module and click on **Create** (CREATE) button.

- Create a Document/Online Document/Folder/Link from menu bar by clicking on respective option, shown in **Fig.23:**
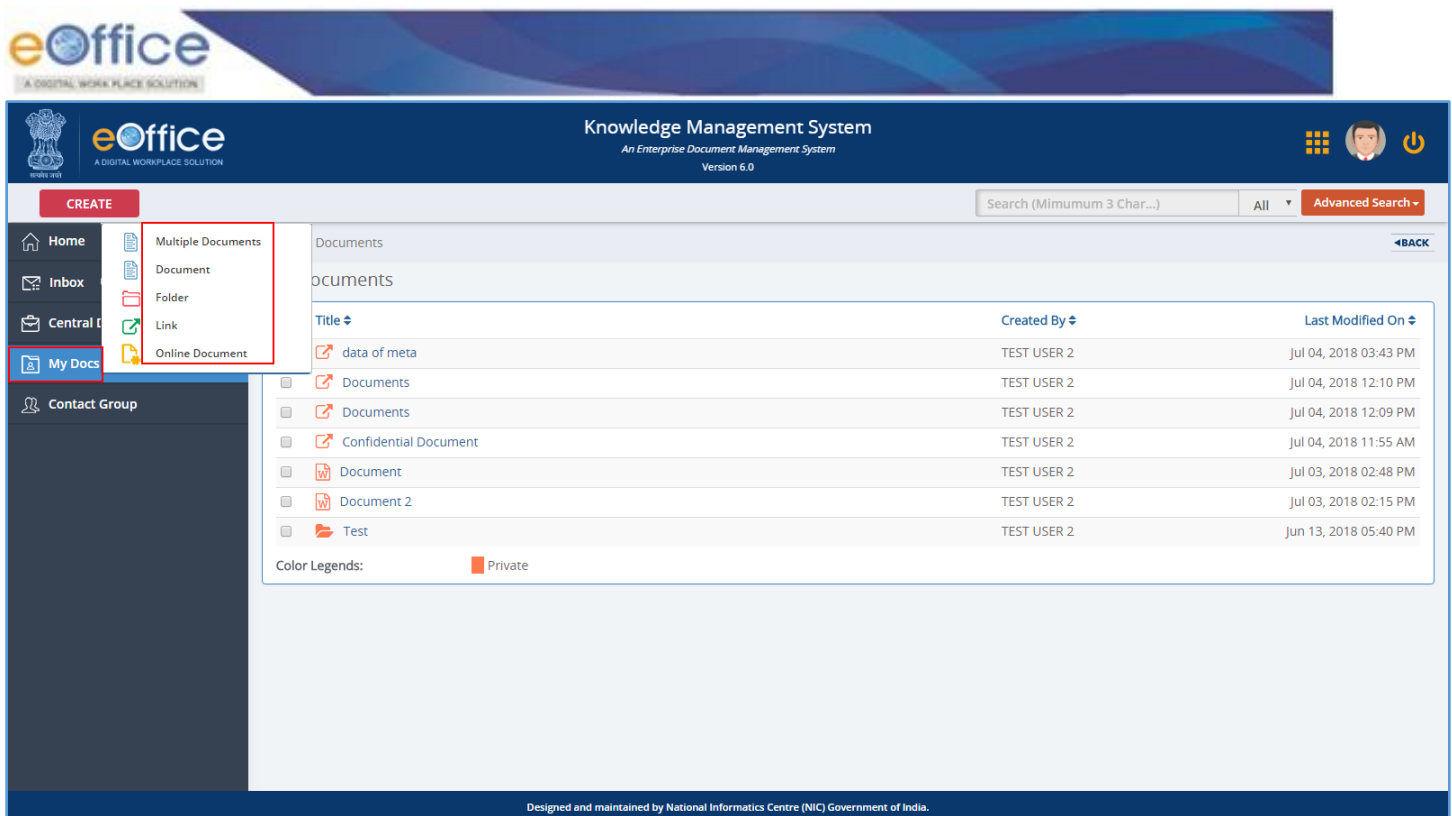
Fig.23

- As a result respective **Detail page appears**, enter the data in essential text fields and click on **Save** (Save) button.

- The document can be viewed under **Home**, **All Recent** and Under **My Docs** module.

Note:
My Doc library varies from user to user as it contains documents created by users through their personal Login.
The user can create documents inside any folder created under My Docs module and can also view the same by clicking the folder/ sub-folders.

Managing Documents - Actions menu

There are few options available under actions menu of Documents, Online Documents, Folders and Links which help the user to perform various tasks on selected document. Various options available under Action menu are shown in **Fig.24**:
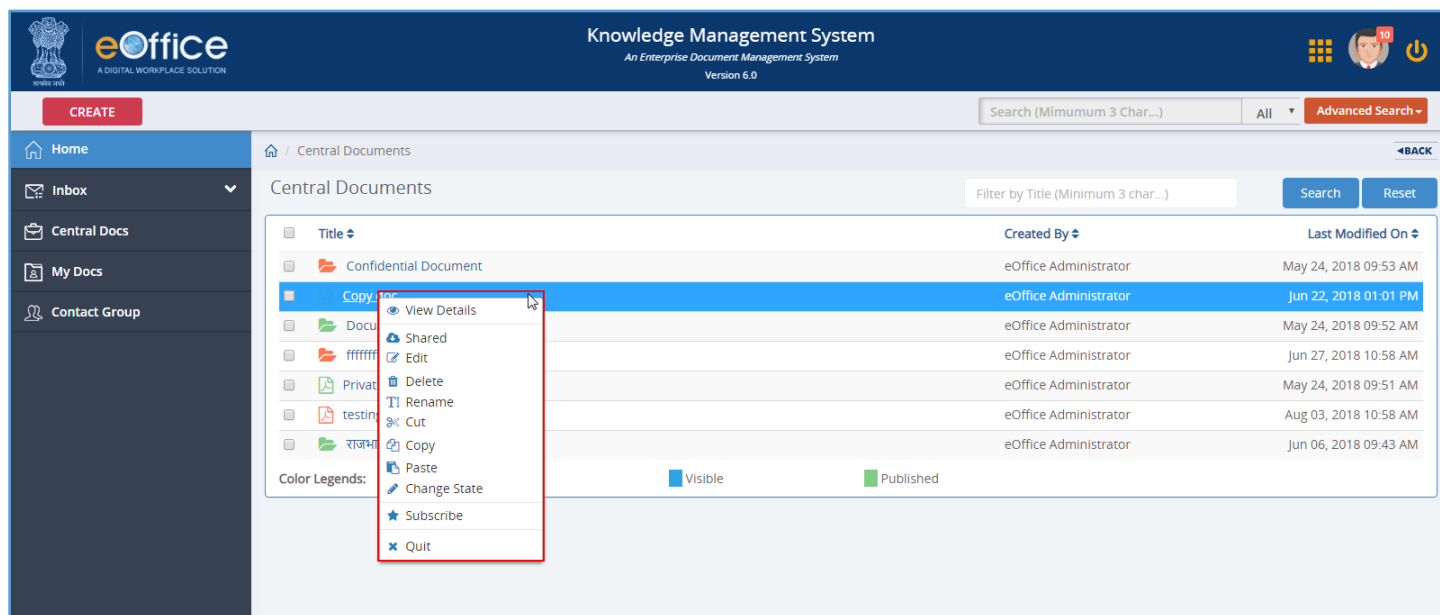

Fig.24

View Details

It is used to view the details of document(s)/ Online Documents and to download the document. User can also download the document directly by clicking the left click of mouse.

The steps to view and download document(s)/ Online Documents are as under:-

- Move the mouse cursor on the document/ Online Documents which needs to be view or download and select right click from the mouse.

- Select the View Details (⊙ View Details) option from the menu.

- The Document details page appears, click 📥 to download the attached document, as shown in **Fig.25**:
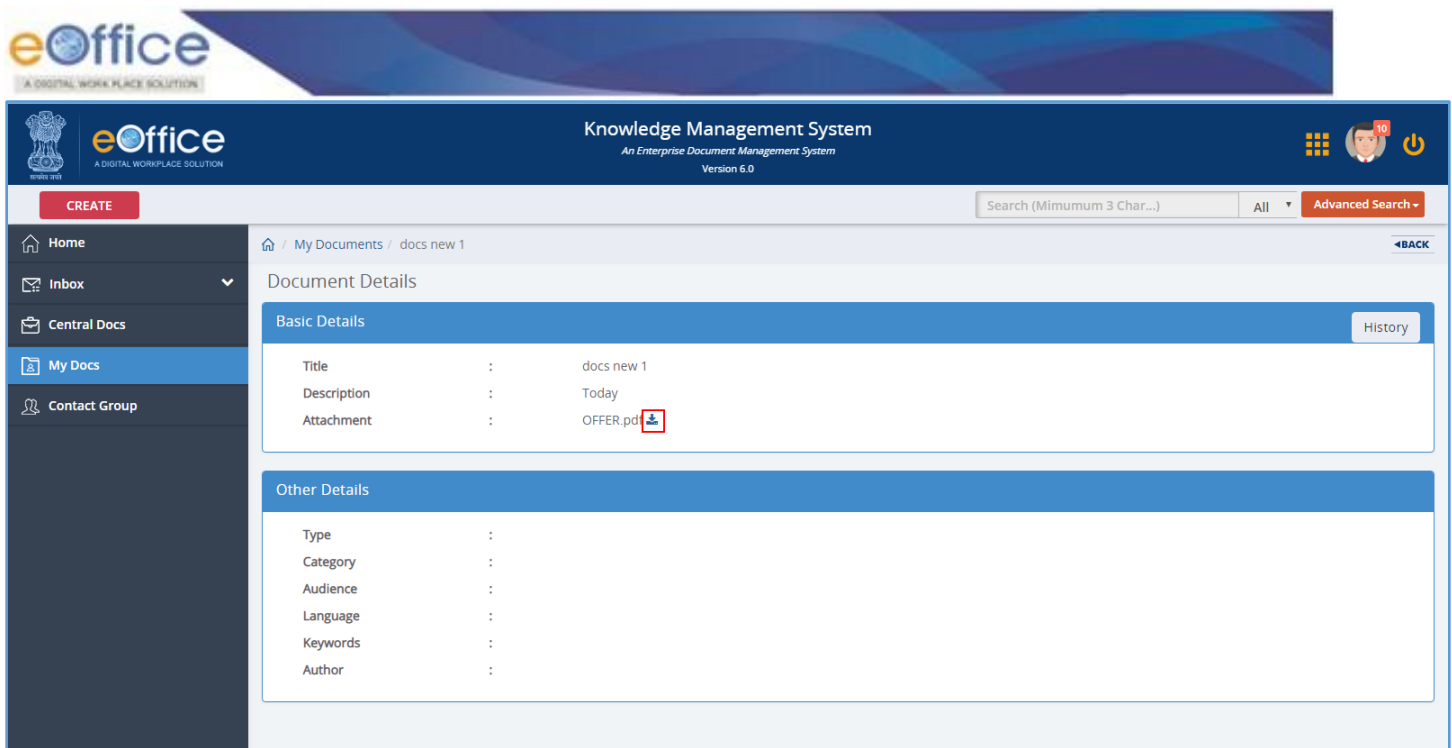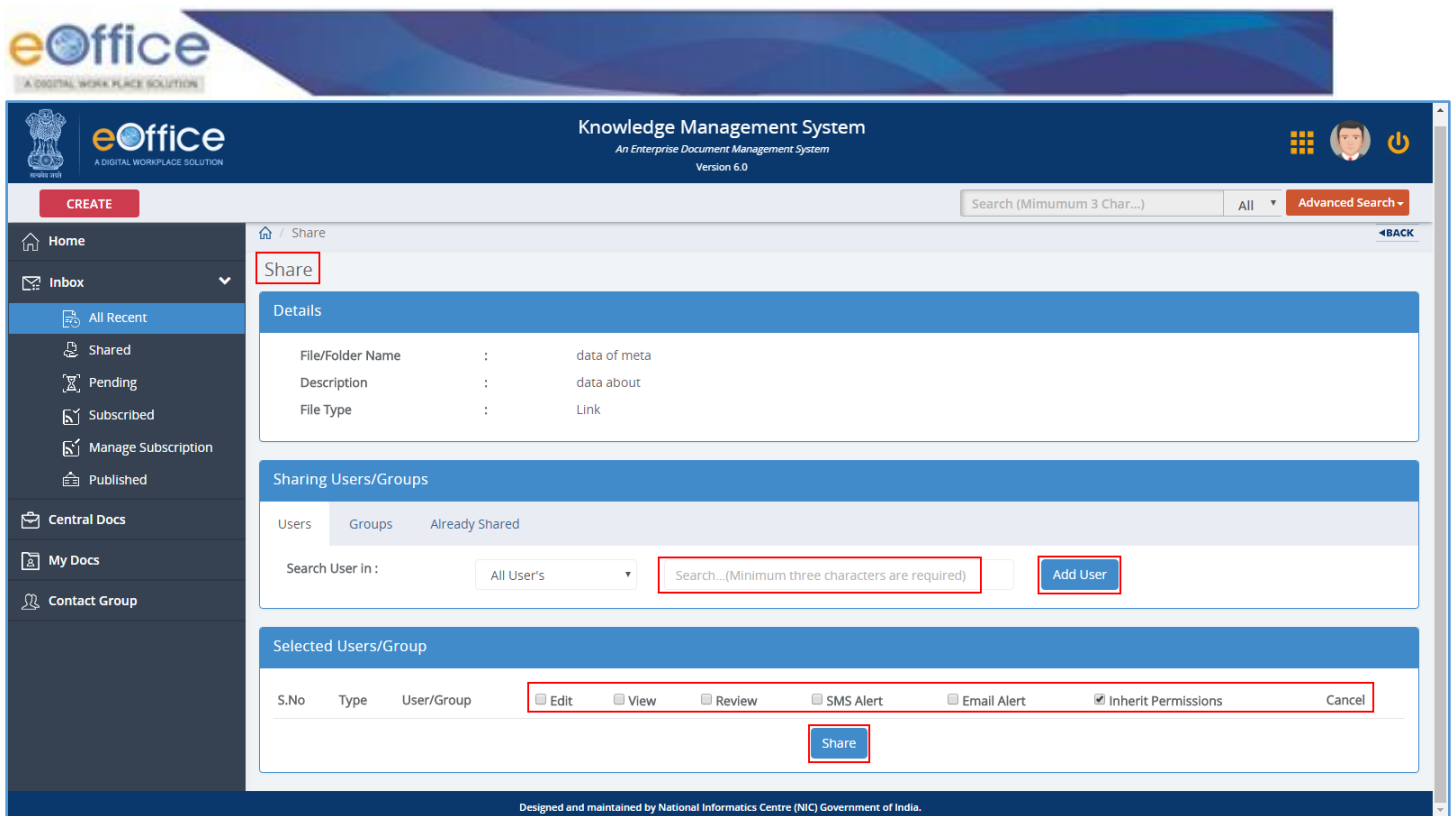
Fig.25

Share

It used to share the **Documents/Online Documents/Folder/Links** with other user(s).

The steps to share a Documents/Online Documents/Folder or Links are as under:-

- Move the mouse cursor on the document/link which needs to be shared and select right click from the mouse.

- Select the Share (🔵 Share) option from the menu.

- **The Share** page appears; enter the **User Name** in the Search bar corresponding to **Search User** field.

- Click on the **Add User** (Add User) button to add User/Group. All the added users can be viewed in Selected **User/ Groups** List.

- A user can provide privileges to View/Edit/Review etc. to the added users.

- Click the **Share** (Share) button as a result the selected document gets shared with the selected group of users with the assigned access rights, as shown in **Fig.26:**
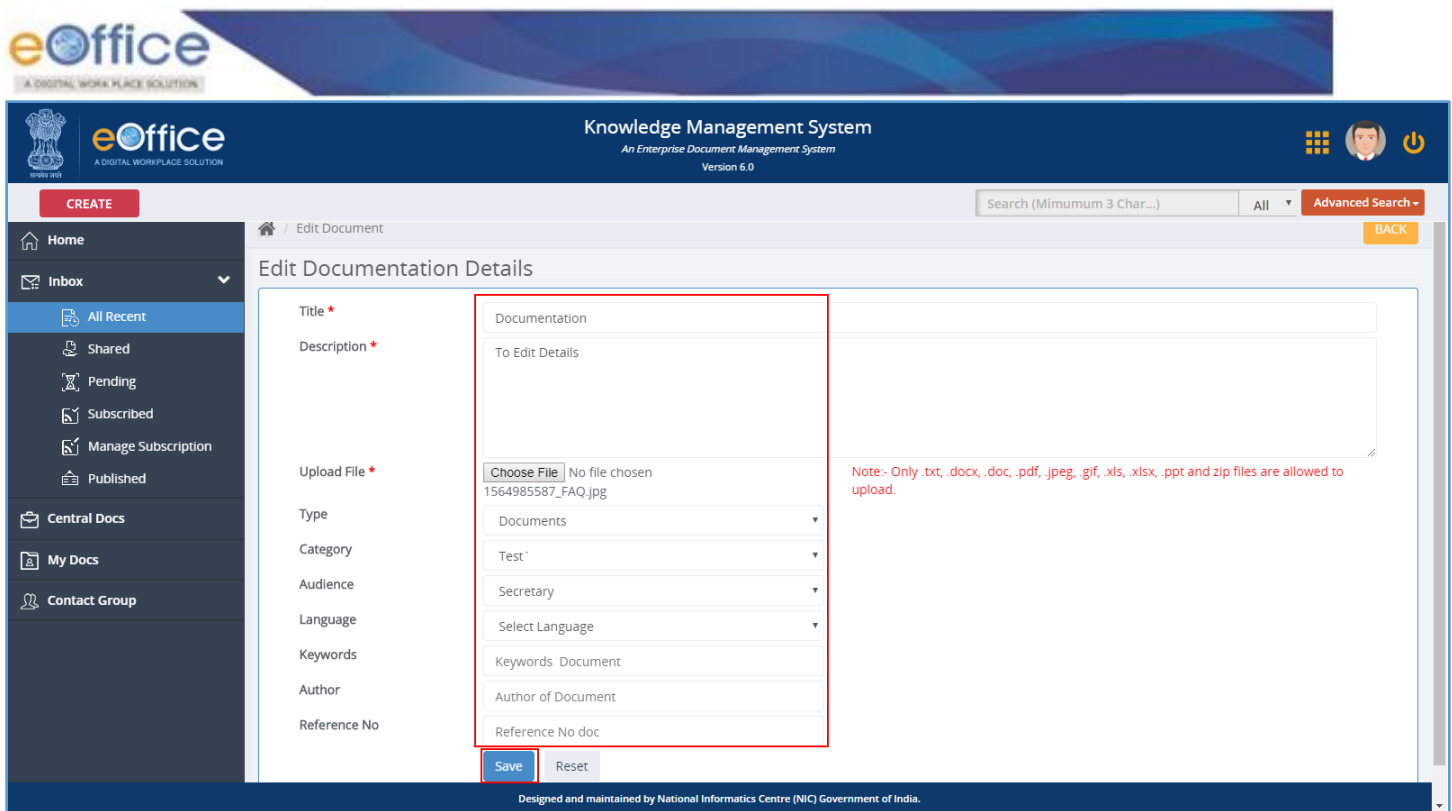
Fig.26

Edit

It is used to edit the data of selected Document/ Folder/ Links/ Online Document depending upon the access rights assigned and the requirements.

The steps to edit a Documents/Online Documents/Folder/ Links are as under:.

- Click on **Edit** ( ) button to edit Document/ Link/ Folder/ Online Document.

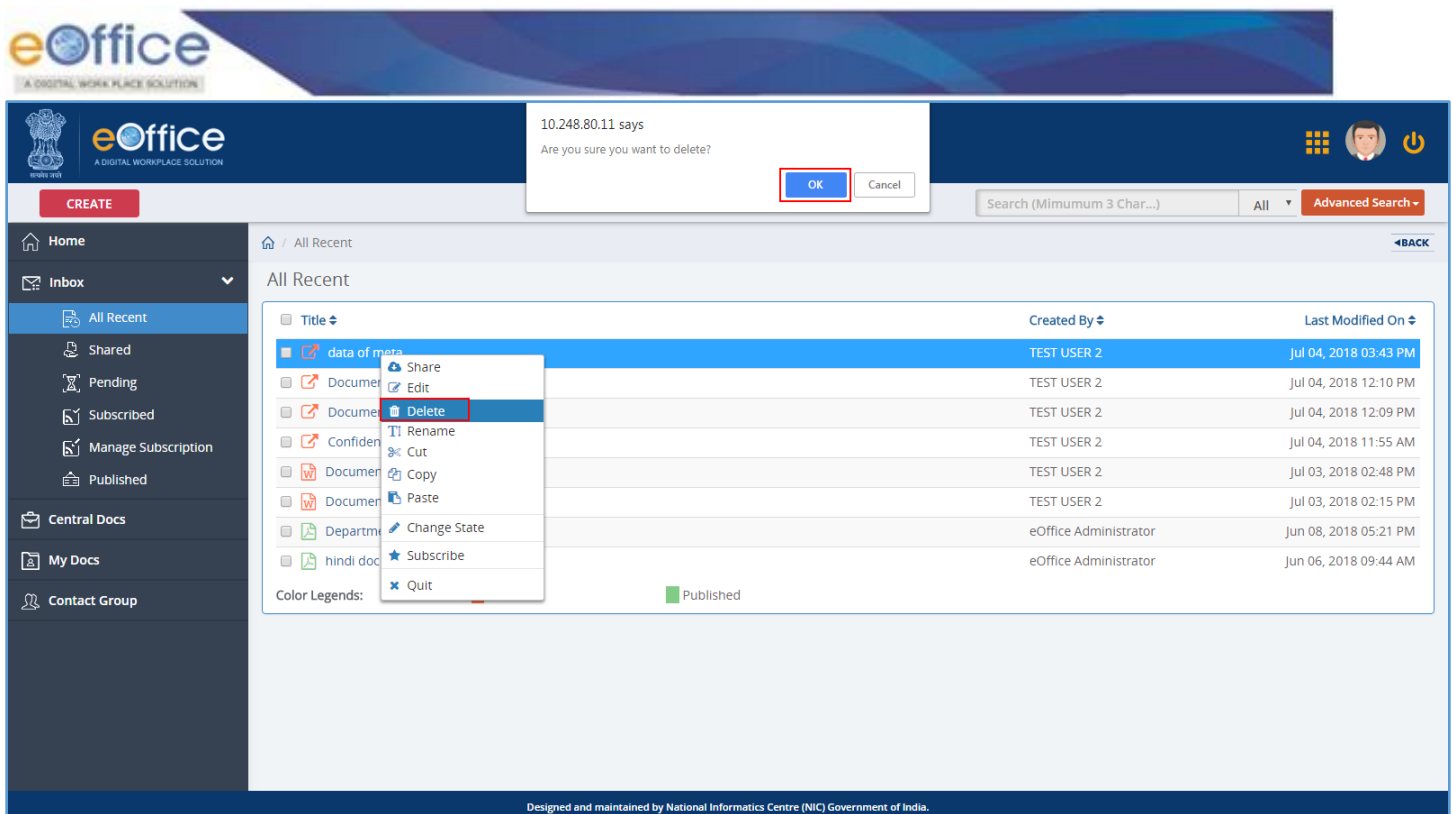- The Edit page appears; edit the details as shown above in **Fig.27:**

Fig.27

- Click on **Save** (Save) button.

Delete

It is used to delete the document depending upon the access rights assigned.

The steps to edit a Documents/Online Documents/Folder or Links are as under

- Click on **Delete** (🗑 Delete) button to delete document/Link/folder.

- A prompt box appears shown in **Fig.28:**

Fig.28

- Click on **Ok (** **)** button and the document /link/folder will be successfully deleted.

Rename

It is used to rename the Title of document/ Link/ Folder/ Online Document depending upon the access rights assigned.

The steps to rename a Documents/Online Documents/Folder or Links are as under.

- Click on **Rename** ( ) tab to rename Document/ Link/ Folder/ Online Document.

- The rename title page appears as shown in **Fig.29:**
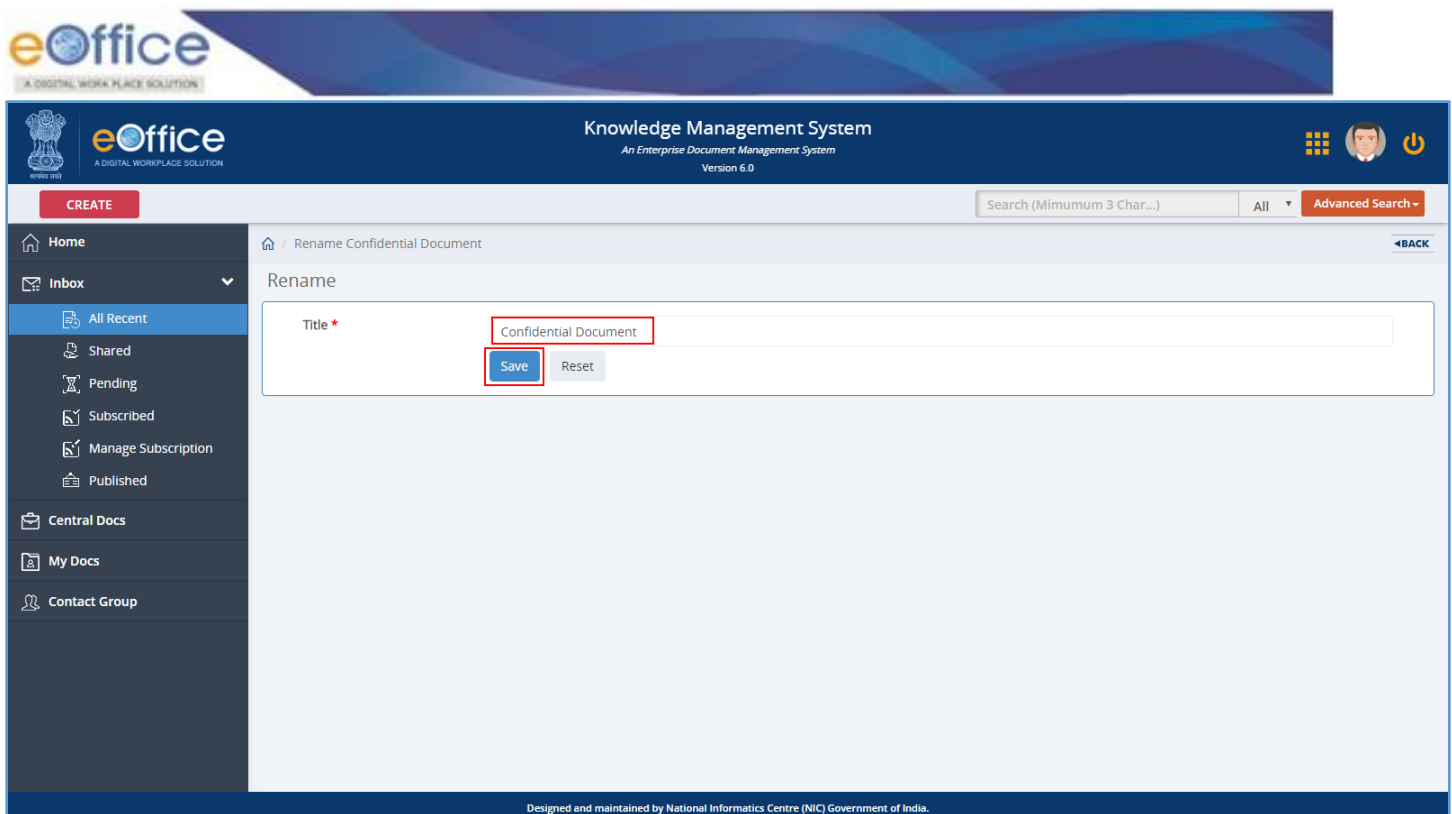
Fig.29

- Edit the detail in the text field and click on **Save** (Save) button.

Cut/ Copy /Paste

Cut/ copy means to move a section from one place to another. User can cut/ copy a Document/ Folder/ Link/ Online Document and can move to other Folder. Paste facilitates the user to embed a particular Document/Folder/ Link/ Online Document to a new location.

The steps to cut a Documents /Folder are as under

- Select Document/ Folder/ Link/ Online Document and Click on **Cut** (✂ Cut) button or **Copy** (🗐 Copy) button to cut/ copy document/ Folder/ Link/ Online Document.

- As a result as message appears the Document/ Folder/ Link/ Online Document has been cut or copied as shown in **Fig.30** & **Fig.31:**
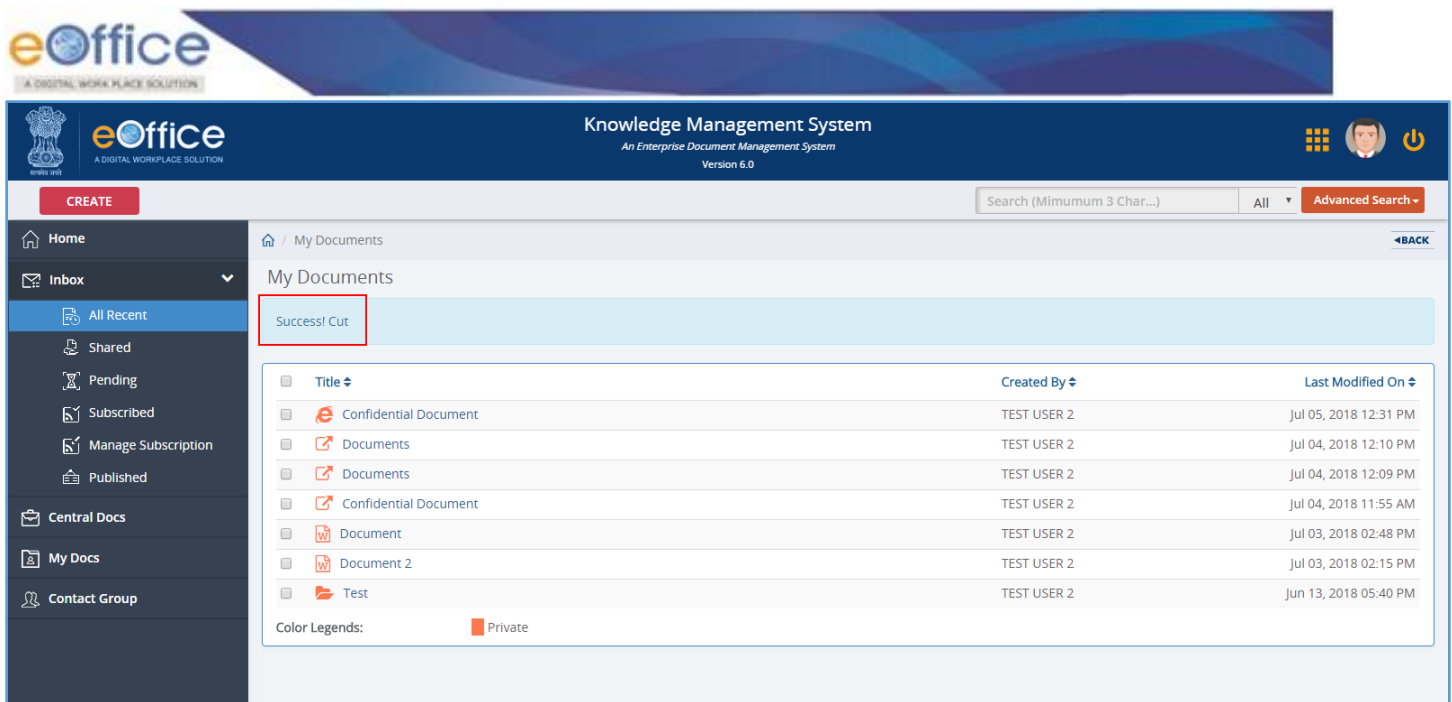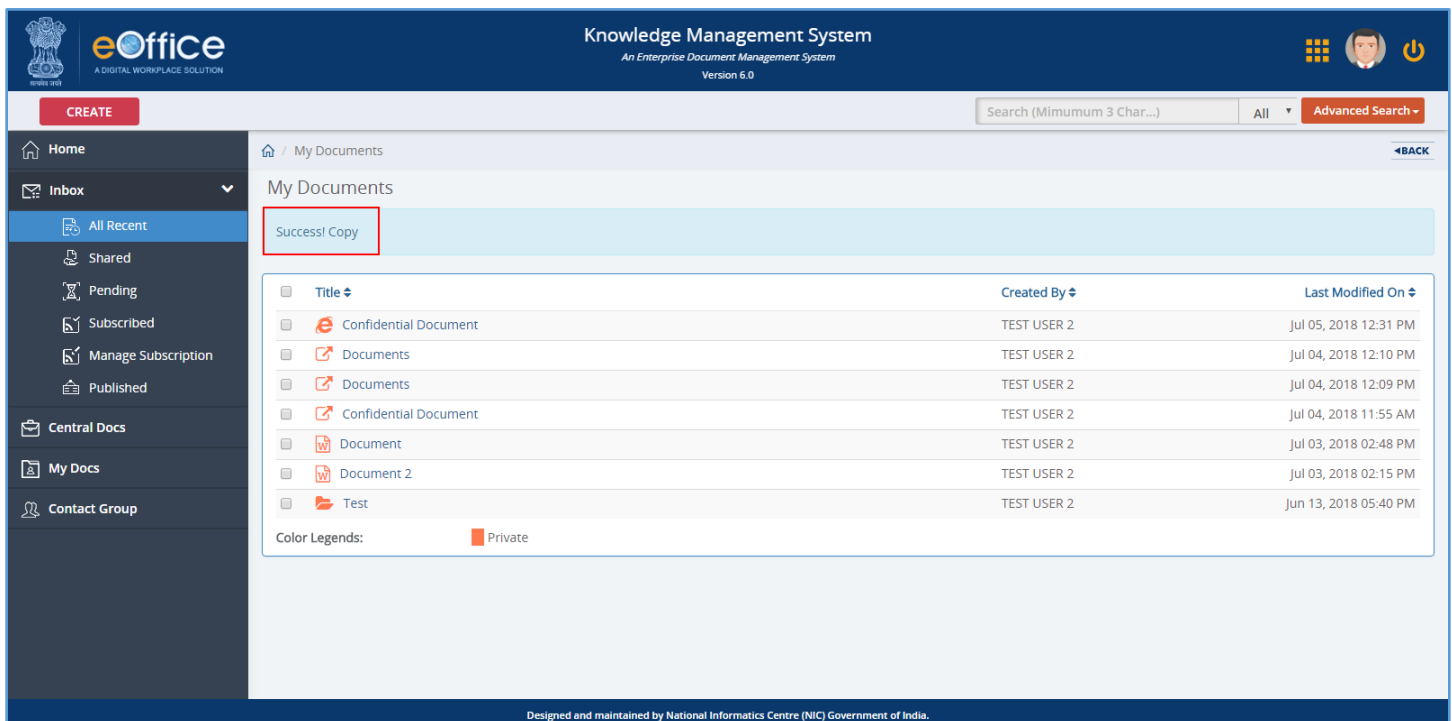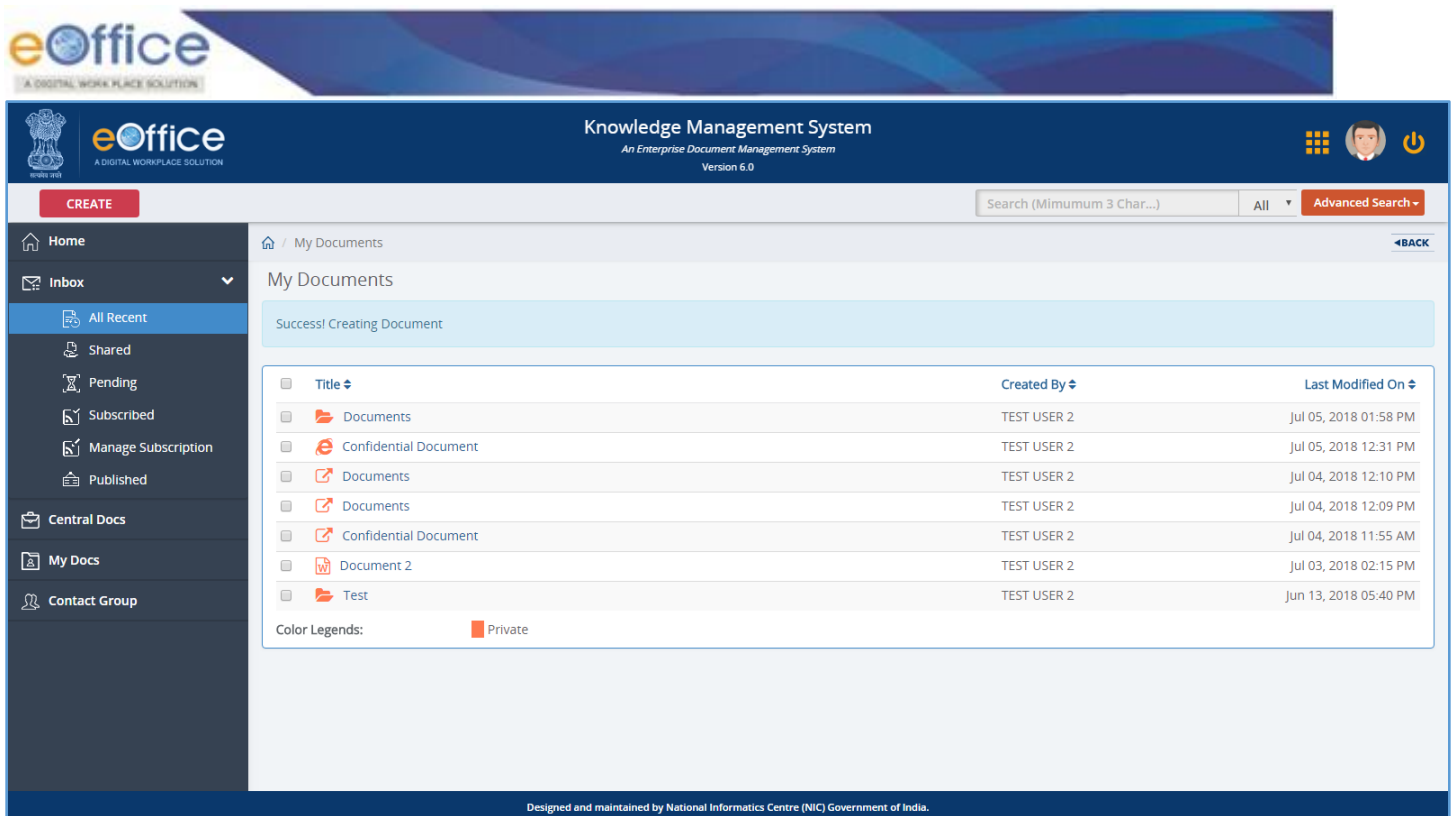
Fig.30

Fig.31

- Select Folder to where the Document/ Folder/ Link/ Online Document are required to shift.

- Click on **Paste** (Paste) button, as a result message appears the Document/folder has been paste, as shown in **Fig.32:**

Fig.32

Change state

It facilitates the user to change the current state of the document/link details according to the privileges assigned to the user. E.g. submit for publication, reject, retract, etc.

The steps to change state of Document/Online Document/Folder/ Links are as under.

- Click on **Change State (** ✏ Change State **)** button to change the state of Document/ Link/ Folder/ Online Document.

- Change Viewing Rights for the Uploaded Document page, appears as shown in **Fig.33:**
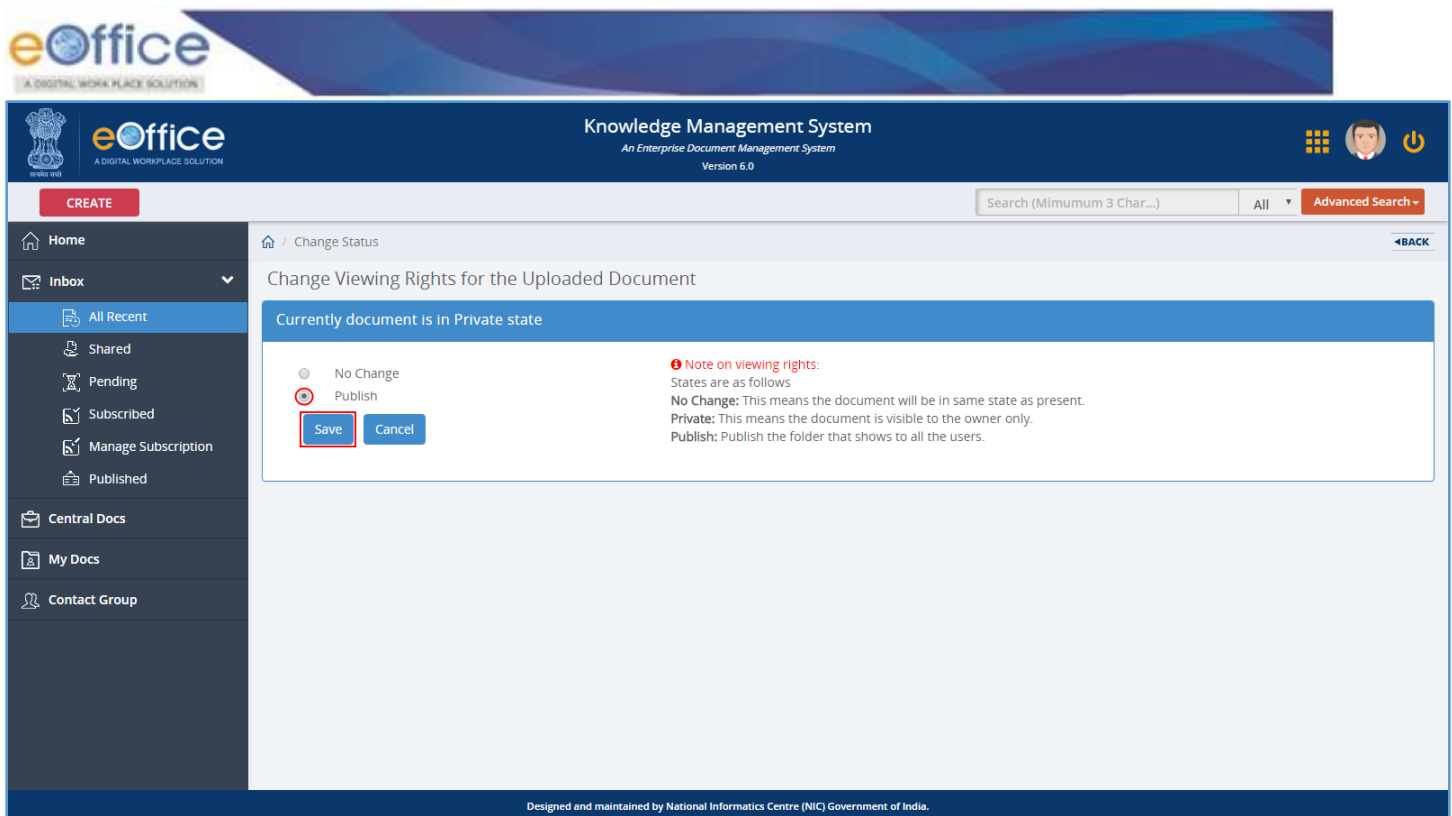
Fig.33

- Change the state and click on **Save** (Save) button.

Subscribe

The term Subscribed facilitates the user to keep track on changes done on all the Documents/ Online Documents/ Folders/ Links that are subscribed by that respective user. A user can subscribe a document/Folder, so that whenever any change is done, the user gets notification for the same.

Quit

To quit from the Actions menu.

Contact Book

It is used to create new contact list and groups, so that it will be easier to categories the users while sharing any Document/ Folder/ Link/ Online Document as shown below in **Fig.34:**
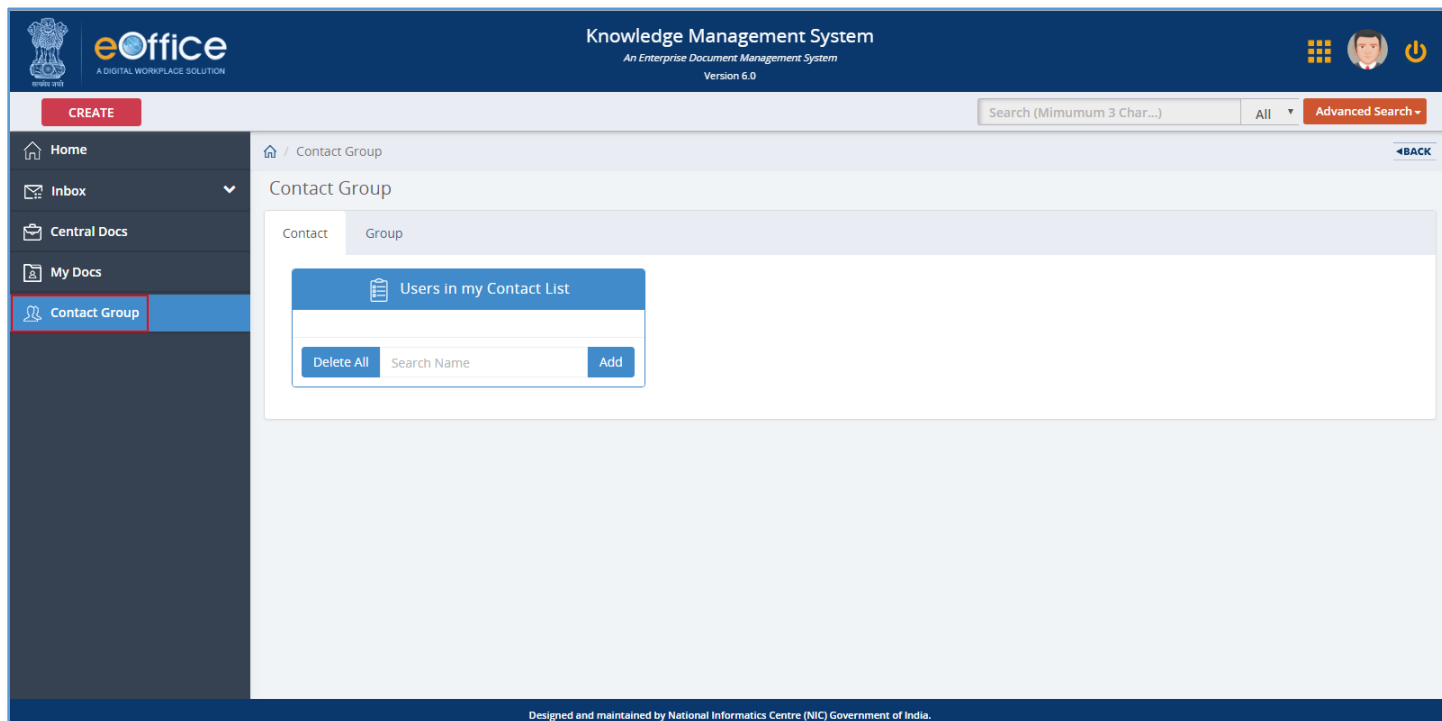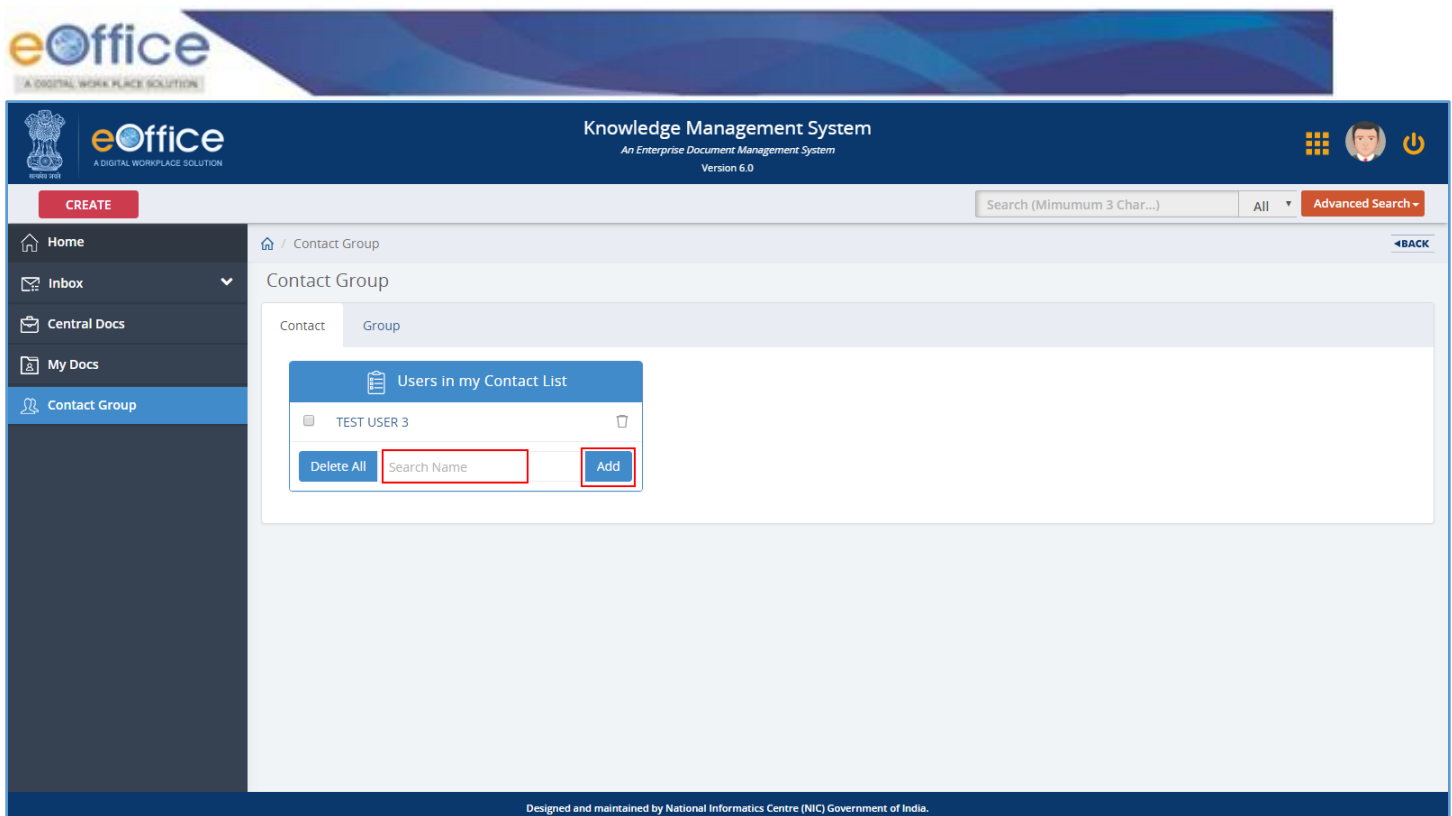

Fig.34

Note:

User can delete the contacts name from the **"Contact List",** by clicking on the **Delete All** (Delete All) button.

Add Contact

The steps to add contacts are mentioned below:

* Click on **Contact Group** (Contact Group) module.

* Enter the user name in search text bar and click on **Add** (Add) button as shown in **Fig.35:**
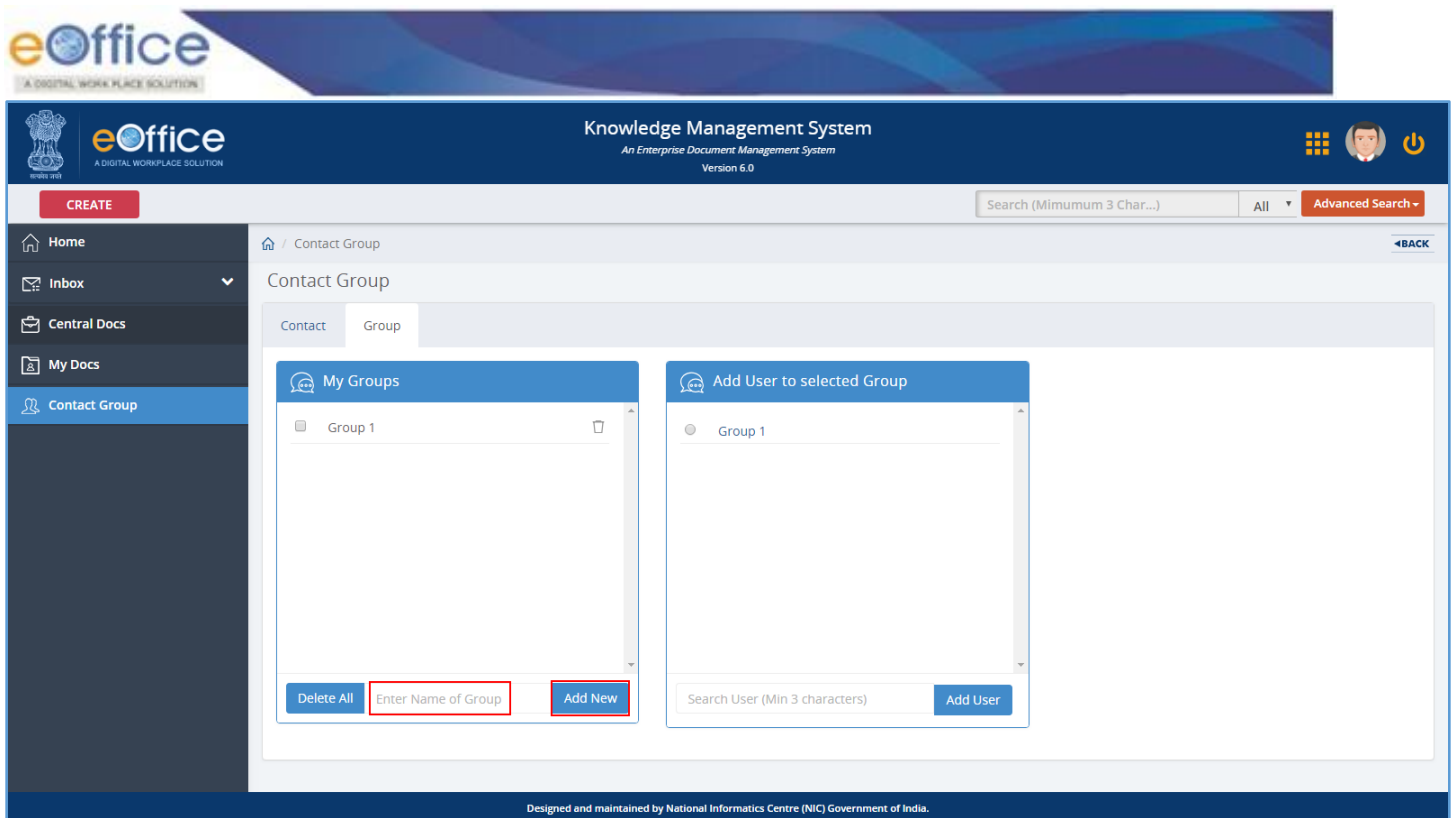
Fig.35

- The selected user will be added to **Contact List.**

Add Group

The steps to create a group are mentioned below:

- Click on **Contact Book** ( ) module.

- Click on **Group** ( ) tab, as a result the page appears as shown in **Fig.36:**

Fig.36

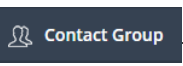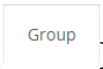- Enter the group name in text field and click on **Add New** (Add New) button.

> Note:
> The user can delete a group by selecting the check box corresponding to the group name, click on **Delete All (** Delete All **)** button.

Add Contact in a Group

The steps to add contact name in a group are mentioned below:

- Click on **Contact Book** (Contact Group) module.

- Click on **Group** (Group) tab.

- Select the group, enter the user name in search text bar and click on **Add User** (Add User) button as shown in **Fig.37:**
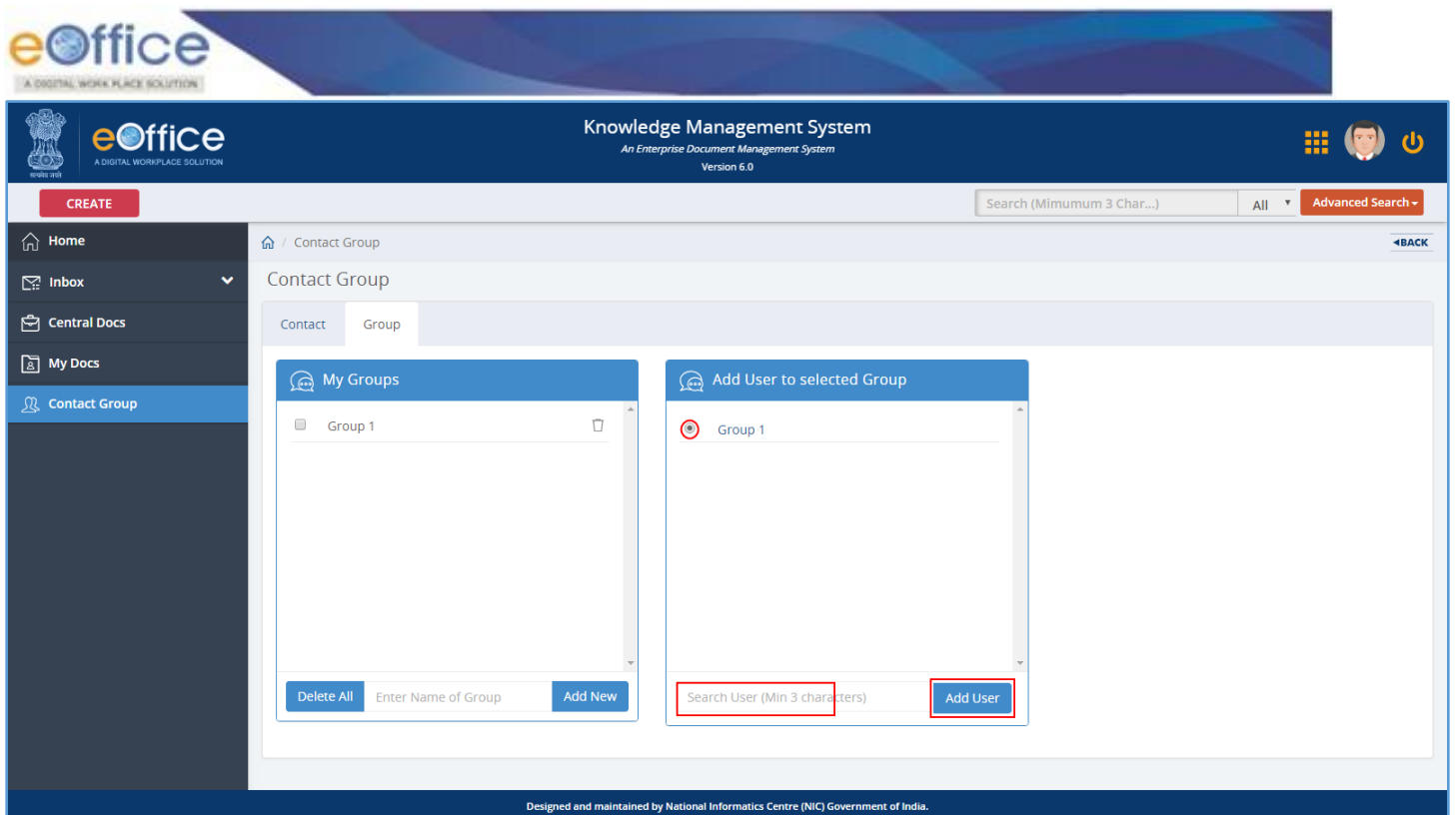
Fig.37

- The selected user will be added to the selected group.

> Note:
> The user can check contact names of a group by clicking on the group name; similarly, the details of a particular user of a group can be seen by clicking on the respective user name.

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