Enterprise Document, Communication and Knowledge Management System (EDCKMS)

Version 2.1

Contents

1 Introduction

This document gives information about the usage of EDCKMS. It is assumed that the system has been installed successfully & usernames have been created by the System Administrator.

EDCKMS is divided into the following domains:

- Document / Record Management
- Business Communication
- Knowledge Management
- Knowledge Search

There are certain common features across the domains. When you login to any one of the domains, you will see a welcome screen.

The whole screen is divided into different parts.

On the left side you will see the Menu panel which lists the options available in the domain. To go to a particular option, you have to click the option.

At the top you will see the Title panel with **My Profile** & **Log Out**. To view/edit user profile, click **My Profile**. Details appear in a popup window. Edit details if required & click **Save** to store details.

On the right you will see Edit panel which initially contains a welcome message. This panel is actually used to add/edit data & make query.

At the bottom you will see the List panel which lists the relevant data in a list. If there is hierarchy in the data, it is displayed in tabbed fashion. If data is more, this panel is divided into pages whose numbers are indicated above. To go to a particular page, click the page number. To search data in this panel, enter the key word for **Search** & click **Go**. The results are displayed below. To view the complete list after search, click **Back To List**.

Popup windows are used to display menu & data in some cases.

2 Setting Up the Environment

Ensure the following conditions are met:

- Username & Password is given to you by the System Administrator of EDCKMS Your PC has an internet connection.
- One of the following browsers is available on your PC: Internet Explorer, Netscape, Mozilla Firefox, Opera
- Change browser settings as given in the next section.

2.1 Browser Settings

Internet Explorer
Go to **Tools > Internet Options > Security**. Click on **Internet** icon at the top. Click **Default**. Slide the bar so that **Medium-low** appears. Click **OK** to save the settings.

Netscape
Go to **Tools > Options > Site Controls**. Click **Enable JavaScript**. Click **Allow unrequested popup windows**. Click **OK** to save the settings.

Mozilla Firefox
Go to **Edit > Preferences > Web Features**. Click on **Enable JavaScript**. Remove Checkmark on **Block Popup Windows**. Click **OK** to save the settings.

Opera
Go to **Tools > Preferences > Advanced > Content**. Click on **Enable JavaScript**. Click **OK** to save the settings.
Go to **Tools > Preferences > General**. Select **Open all pop-ups** for **Pop-ups**. Click **OK** to save the settings.

2.2 Login & Log Out

To login to the system:

- Connect to the internet. Open browser window.
- Open web page for the system. You will see Login screen.
- Select **USER** for **User Type**.
- Enter values for **Username** & **Password**. Remember that Password is case sensitive.
- Select value for **Domain** & **Company**.
- Click **Login**.

To logout of the system, first close all popup windows & then click **Log Out** at the top right corner.

3 Document / Record Management

Login to the system by selecting Record Management as the Domain. This domain is used to organize, upload & share business documents.

Following are the options provided in this domain:

- Business Flow
- Search Business Documents
- Upload Business Documents

3.1 Business Flow

Before uploading documents, it is essential to create the business flow. Business flow consists of 3 entities: Process, Activity, Transaction.

Process is a specific functional job performed in a department. Recruitment is a Process within HR Department, Sales Order Processing is a Process within Sales Department.

Activity is the next level entity within a Process. It is like Interview within the Process of Recruitment.

Transaction is the next level entity within an Activity. It is like Print Interview Letter within the Activity of Interview.

3.1.1Add/Edit/Delete Process

To create a Process, click **Process(P)** button in List panel. Only a Department Head can create a Process. The screen is displayed in the Edit panel. Enter/select details on the screen & click **Save** to store data. The newly created Process appears in the List panel below.

To edit an existing Process, click **Edit** button appearing next to the Process in the List panel. The Process details are displayed in the Edit panel. Edit the required details & click **Save**. To attach an Process to another previously created Process, click the box

I want to Attach Previous Process.

To delete an existing Process, click **Delete** button appearing next to the Process in the List panel.

3.1.2Add/Edit/Delete Activity

To create an Activity, click **Activity(A)** button in List panel. The screen is displayed in the Edit panel. Select the Process Name for which the Activity is being created. Enter/select other details on the screen & click **Save** to store data. The newly created Activity appears in the List panel.

To edit an existing Activity, click **Edit** button appearing next to the Activity in the List panel. The Activity details are displayed in the Edit panel. Edit the required details & click **Save**. To attach an Activity to another previously created Activity, click the box **I want to Attach Previous Activity**.

To delete an existing Activity, click **Delete** button appearing next to the Activity in the List panel.

3.1.3Add/Edit/Delete Transaction

To create a Transaction, click **Transaction(T)** button in List panel. The screen is displayed in the Edit panel. Select the Activity Name for which the Transaction is being created. Enter/select other details on the screen & click **Save** to store data. The newly created Transaction appears in the List panel.

To edit an existing Transaction, click **Edit** button appearing next to the Transaction in the List panel. The Transaction details are displayed in the Edit panel. Edit the required details & click **Save**. To attach a Transaction to another previously created Transaction, click the box **I want to Attach Previous Transaction**.

To delete an existing Transaction, click **Delete** button appearing next to the Transaction in the List panel.

3.2 Upload Business Documents

This option is meant for uploading business documents related to a Process, Activity or Transaction.

To upload, click **Upload Document** button against a Process, Activity or Transaction. The screen appears in the Edit panel. Enter the details & click the hyperlink. A popup window appears.

Click **Browse** to select the file. Select the file & click **Open**. The selected file appears in the popup. Continue selecting other files if required. If you want to delete a file already selected, click **Delete** against that file.

Click **Attach** to attach the files to the document.

Now click **Save** to store data.

To list the documents uploaded, click **Documents** button against a Process, Activity or Transaction. The list of documents uploaded appear in the Edit panel.

3.3 Search Business Documents

This option is used to search documents containing a particular word. Enter the text in the Edit panel & click **Go**. The results appear in a popup window. The document can be viewed by clicking on the hyperlink.

3.4 Welcome Popup

This popup appears after login. This is meant to keep track of documents. Click **Newly Arrived Business Documents** to list documents which have been uploaded but not opened. The document list appears in a popup window. Click **Latest Read Business Documents** to list documents which have been uploaded & opened. The document list appears in a popup window.

4 Business Communication

This domain is used for communication between different users in an organization. Following are the options available in this domain:

- Discussion Topics
- Discussion
- Upload Document
- Search Document
- Seek Help
- Provide Help

4.1 Discussion Topics

The first thing in Business Communication is to create Topics for discussion.

To create a Topic, click **New Topic** button in the List panel. Enter the details in the Edit panel & click **Save**.

To edit a Topic, click **Edit** button against it. The Topic details are shown in the Edit panel. Edit the required details & click **Save**.

To delete a Topic, click **Delete** button against it.

To create a Sub Topic under a Topic, click **Add Sub Topic**. Enter the details in the Edit panel & click **Save**.

To edit a Sub Topic, click **Edit** button against it. The Sub Topic details are shown in the Edit panel. Edit the required details & click **Save**.

To delete a Sub Topic, click **Delete** button against it.

4.2 Discussion

To enter into discussion on a Topic or Sub Topic, click **Discussion Forum** button against it. If you want to join an existing session on the Topic, select the session & click **Submit**.

If you want to create a new session, click the check box **Create New Session**, give session name & click **Submit**. In both cases, the discussion forum screen is displayed. Messages from all the sessions appear in the message box at the top. You can enter your message in the box **My Message** & click **Send**.

If you want the message to go to all the users in the session, select **All** for **Send To**. If you want your message to go to a particular user only, select that username. If you are the one who created the new session, then you will be Organizer who has the power to allow or deny users willing to join the discussion. If there is a request from someone wanting to join a session, the username appears in the bottom box where you can either click **Permit** or **Decline**. If you have a web cam connected to your PC, your image appears in the box **My Image**. You can view the image of a particular user in the box **WebCam View** by selecting the username from the drop down list below. If you need the software to make your web cam work, you can download it by clicking the hyperlink **WebCam Application**.

4.3 Upload Document

This option is provided to upload documents against a Topic assigned to your username. When you click this option, a list of Topics are displayed. To upload a document against a Topic, click **Upload Document** button against the Topic. Enter

the details in the Edit panel & click the hyperlink **Upload Multiple Files**. A popup window for file upload is displayed. Click **Browse** to select files from your local PC. After selecting the file click **Open**. The selected file is displayed in the file upload window. You can select more than one file for a document. If you want to delete a file which has been selected, click **Delete** button against the file. When all the files have been selected, click **Attach** to attach the files to the document. This will bring you back to **Upload Document** window. Click **Save** to store the data. You can view the list of documents uploaded by clicking **Documents List** button against the Topic. If there are documents available against the Topic, they are displayed in the Edit panel. You can open the documents by clicking the hyperlinks.

4.4 Search Document

This option is provided to list documents containing a given text. Give the required text in the Edit panel & click **GO**. If the text is found in the documents uploaded, the list of documents is displayed in a popup window. You can open the documents by clicking the hyperlinks.

4.5 Seek Help

This option is provided to ask questions. To ask a question, click **New Question**. Select the Topic & enter other details. Click **Save** to store the data. The question appears in the List panel. You can view answers to this question by clicking **View Answers** button against the question. To delete a question, click **Delete** button against the question.

4.6 Provide Help

This option is provided to give answers to questions. When you select this option, a list of questions which have already been posted appear in the List panel. Click **Write Answer** button against the question to provide answer to that question. Enter the answer in the Edit panel & click **Save**. Now you can go back to the option **Seek Help**

& view the answer to this question. To view the answer text, click the hyperlink in the Edit panel. You can give rating between 1 to 10 to the answer & click **Accept**.

4.7 Welcome Popup Window

To see the list of documents already read, click **Documents Read**. The list of documents is displayed in a popup window. To see the list of documents which have not been read, click **New Documents**. The list of documents is displayed in a popup window. To see the list of new Topics which have been created, click **New Topics**. The results appear in a popup window.

5 Knowledge Management

This domain is used to manage knowledge within an organization. To go to this domain, select **Knowledge Management** for **Domain** during login.

- Following are the options available in this domain:
- Topics
- Post Ideas
- Bulletin Board
- Learning Experience.

5.1 Topics

The first process in Knowledge Management is the creation of Topics & Sub Topics. To create a new Topic, click **New Topic** in the List panel. The screen appears in the Edit panel. Fill details & click **Save** to store data. The added Topic appears in the List panel. To edit a Topic, click **Edit** button against the Topic. Details appear in the Edit panel. Edit fields & click **Save**. To delete a Topic, click **Delete** button against the Topic.

To create a Sub Topic for a Topic, click **Add Sub Topic** button against that Topic. Enter details in the Edit panel & click **Save**. The Sub Topic appears in the List panel. To edit, click **Edit** button against the Sub Topic. Edit details in the Edit panel & click **Save**. To delete a Sub Topic, click **Delete** button against the Sub Topic. You can continue creating Sub Topic for a Sub Topic & so on.

5.2 Post Ideas

This option is meant to post ideas against a Topic or Sub Topic. Click **New Idea** button against a Topic or Sub Topic. Enter details in the Edit panel & click **Save**. To view ideas against a Topic or Sub Topic, click **View Ideas** button against it. A list of ideas posted appears in the Edit panel. To add an idea for an existing idea click **Idea on Idea** button. To add comments for an idea, click **Comments** button. To view comments already posted, click **Comments** button against the idea.

5.3 Bulletin Board

This option is meant to post questions, replies & comments against a bulletin for a Topic. To add a Question against a Topic, click **New Question** button against it. Fill the details in the Edit panel & click **Save**. To list the Questions, click **List Questions** button against the Topic. The list is displayed in the Edit panel. To post a Reply to a Question, click **Reply** button against the Question. To post a Question against a Question, click **Question** button against the it. To post Comments against a Question, click **Comments** button against it.

5.4 Learning Experience

This option is meant to preserve the experience obtained during a project. To create a new Project, click **New Project**. Enter the details & click **Submit**. If you want to edit the project, click **Edit Project**. Once the Project is created, it appears in the List panel along with the Phases.

To add experience, click **Edit** button against the Project & Phase from the List panel. You will see a set of tabs displayed in the Edit panel. Enter data in the **General** tab. Now go to tab **Issues/Solutions**. Fill the fields in the boxes provided. You can upload related files by clicking **Browse**. Click **Done** to save data. The saved Issue appears in the list on the left. You can add more than one issue at a time. In a similar way, add details in other tabs & save by clicking **Done**. Finally click the tab **Confirm** to save all the data related to the Project.

6 Knowledge Search

This option is meant to search the EDCKMS Knowledge Management database & the internet for documents containing a specific text. Input the search text & click **Go**. The results from the database as well as from different browsers appear in a popup window from where they can be opened.

7 Import Users From ActiveDirectory

This option provides the windows users to log into the EDCKMS without creating any user information. This enables the user to getrid from remembering the different username and password for login.

8 Creation of Dynamic WebSite through EDCKMS

Assume that Administrator has already created company details for you then.,

The creation of dynamic WebSite involves the following process:

- Create categories, its subcategories if required and upload their corresponding files under the knowledge management.
- Use the custom template to generate the Website along with the security levels,ie.,the user of one role (category for example say, student) cannot access other (category for example 'lecturer') role's webpages.
- Login link gets displayed for general users on top-left corner of the page, and once the user logged in, Logout link appears in place of Login.
- Based on the role of the user, categories and subcategories which are applicable to the user gets displayed as Tree-View on the left side of the WebPage.
- Other feature of the generated website is SEARCH which is based on the user role, to search for an information – type the required search in search textbox present at the top-right portion of the WebPage.