

DMS – Operation Manual

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Introduction

Document Management System (DMS) is one of the services in support of the digitalization of local public services. DMS stores manages, and tracks electronic documents (PDF) and paper-based (inflow and outflow) documents captured through the use of a document scanner. It helps in organizing, storing, and tracking documents, as well as handling tasks such as indexing, searching, and retrieving documents. It provides control of access to documents, track revisions, and maintain the integrity of the document. It has the feature of searching, visualizing and printing copies of the document.

Ministry Of Federal Affairs And General Administration (MOFAGA)
Capacity Development Support For Governance (CDSG) II/ GIZ, Nepal

Digitalization Local Public Services (DLPS)

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- >Further digitalization of local service delivery process at provincial and local government.
- >Helping to ensure that digital processes can be appropriately applied by public officials and used by the population to access public services.
- >Improved exchange of information between the levels of government.
- >Improved access of the population to public services (offered by the municipal ward offices)

Help to ensure the public tasks in the multi-level government system are in line with citizens' demands and the legitimacy of the federal system.

Document Management System (DMS)

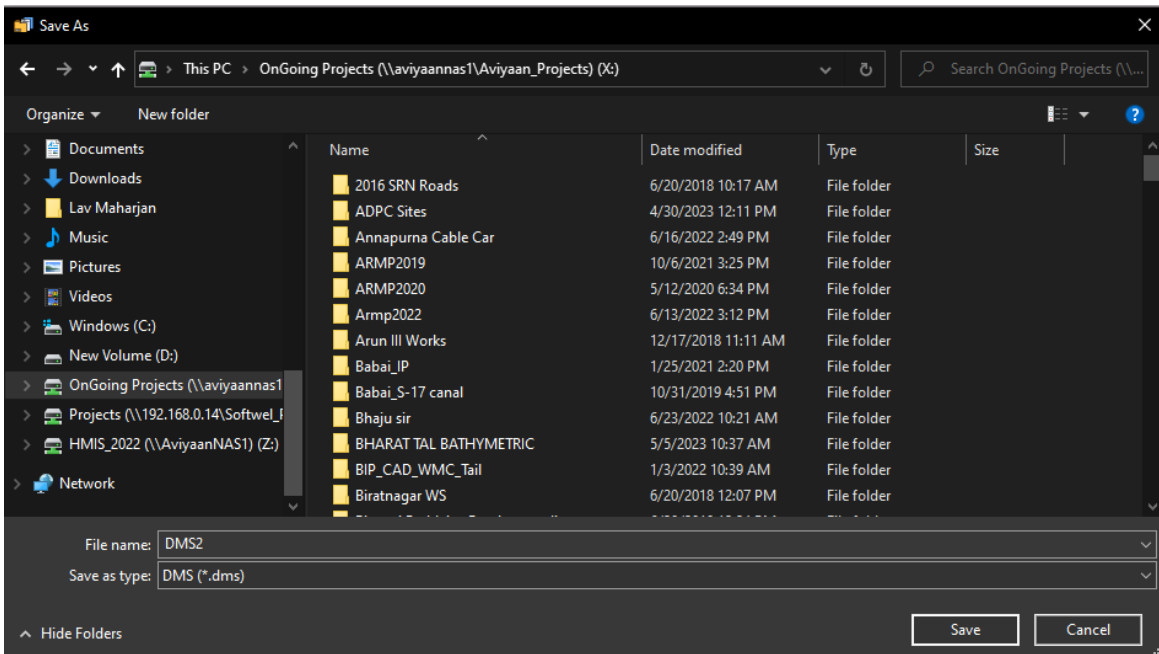
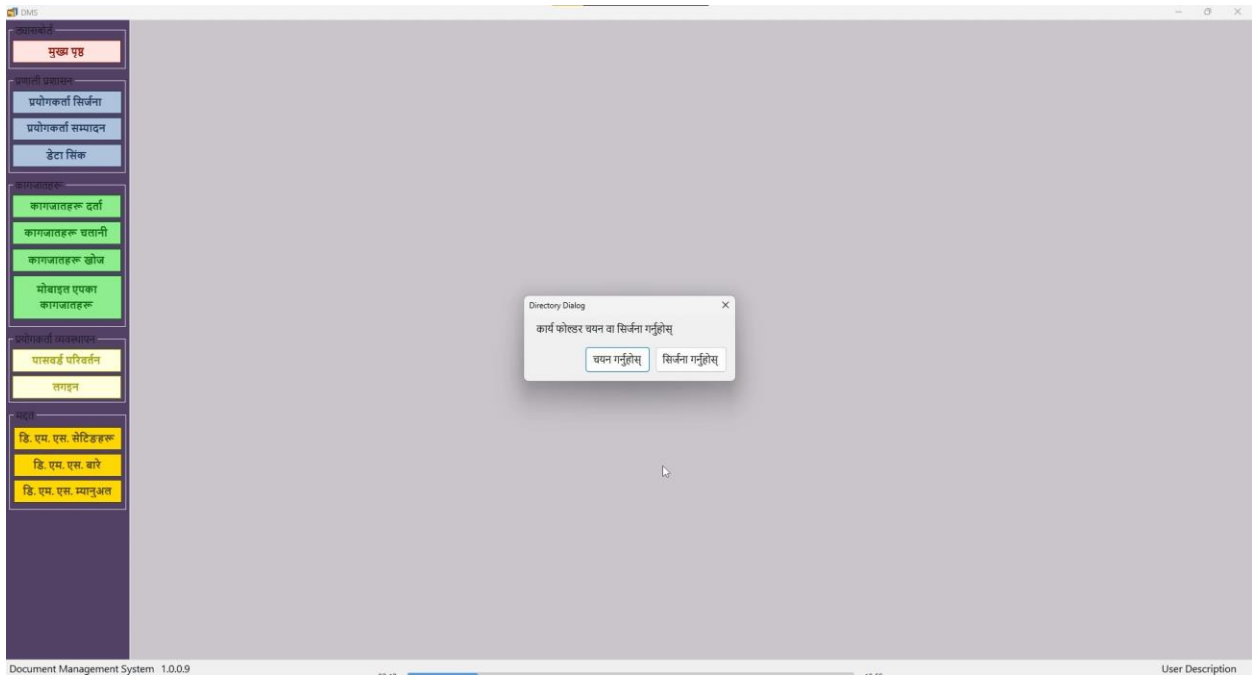
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Getting Started with

When the DMS app is opened for the first time, it asks for Working Directory. Users can either create or select the existing DMS file (created previously by Admin).

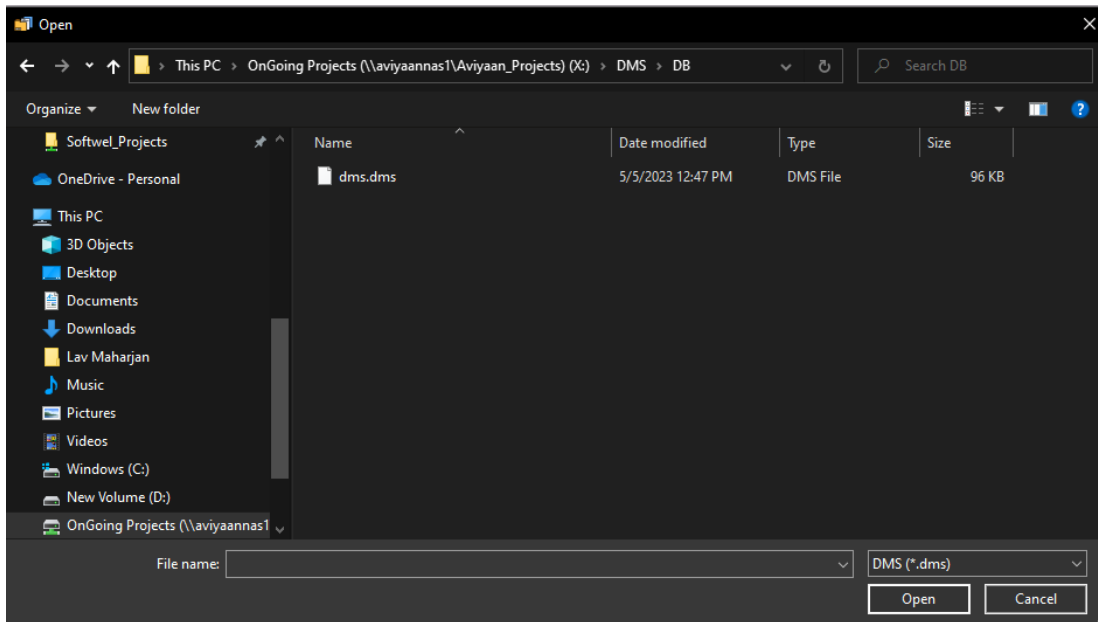
Creating the working Directory.

If the user clicks on “Create”, a save dialog box appears asking the user to save the DMS file. Here user can create the dms file in a Mapped Network Drive or Network Attached Storage (NAS).

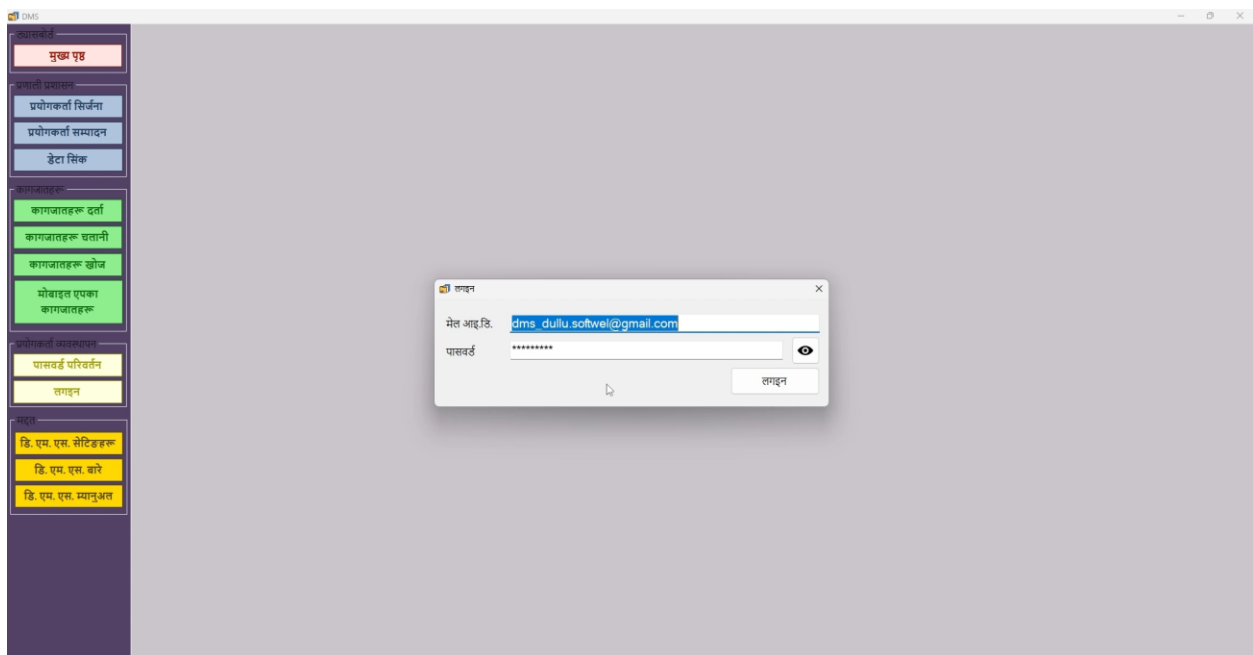


Selecting the working directory

If the user clicks “Select”, an open dialog box appears asking the user to select the DMS file previously created by the admin.



Once the DMS file is created or selected, the DMS app asks the user to enter the login credentials. Each municipality is given their respective login credentials.

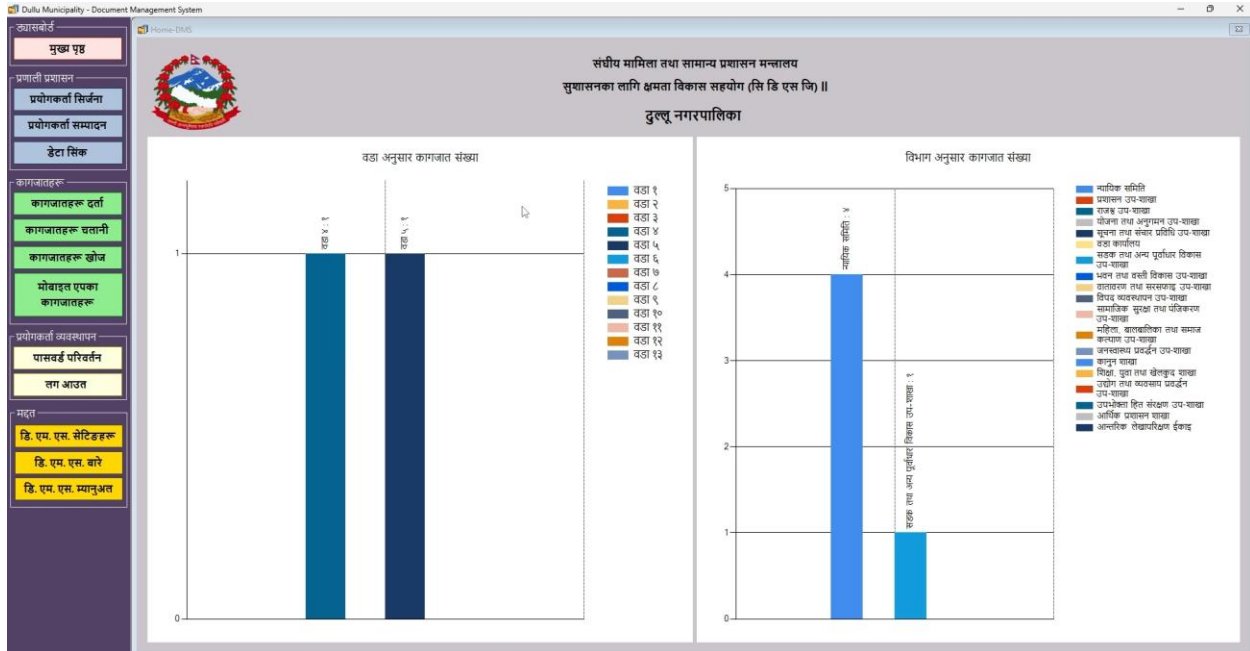


After entering the login credentials, the home page will be displayed.

All these steps have to be followed once the application is just started for first the time.

Home Page

The home page consists of some basic information about the DLPS and DMS along with two charts showing the number of documents worked with. The first chart is the “Ward-wise document count” whereas the second chart is the “Category-wise document count”.



The left panel of the homepage consist of menu items for working the DMS App. The menu in serial order is:

1. Dashboard -> Home Page.
2. System Administration
 - a. Create User
 - b. Edit User
 - c. Data Synchronize
3. Department -> Documents
4. Documents
 - a. Darta
 - b. Chalani
 - c. Search
 - d. Municipal Docs
 - e. Integrated Mobile App
5. User Management
 - a. Change Password
 - b. Login / Logout
6. Help -> About DMS & Manual

System Administration

Create User

The admin of DMS can create a user for the DMS App. Admins must enter the details mentioned in the figure below to create the user. Afterwards, the user can log into the DMS App using the created login credentials.

प्रयोगकर्ता सिर्जना
✕

नाम

मेल

पासवर्ड

वडा पहुँच

v

डाटा क्लियर

स्थरिय पहुँच

v

विभागीय पहुँच

v

न्यायिक समिति

प्रशासन उप-शाखा

राजश्व उप-शाखा

योजना तथा अनुगमन उप-शाखा

सूचना तथा संचार प्रविधि उप-शाखा

वडा कार्यालय

सडक तथा अन्य पूर्वाधार विकास उप-शाखा

भवन तथा वस्ती विकास उप-शाखा

वातावरण तथा सरसफाइ उप-शाखा

विपद व्यवस्थापन उप-शाखा

सामाजिक सुरक्षा तथा पंजिकरण उप-शाखा

सिर्जना गर्नुहोस्

Admin can select three "Access Levels": Admin, Editor, Read-only and Municipality admins can select the "Access Department. An admin will have access to all the access areas.

pg. 7

Edit user

An admin can edit the properties of any user. To select a user, the admin has to select the Name and Mail of the user.

प्रयोगकर्ता सम्पादन गर्नुहोस्

नाम

मेल

पासवर्ड

वडा पहुँच

स्थरिय पहुँच

विभागीय पहुँच

- न्यायिक समिति
- प्रशासन उप-शाखा
- राजश्व उप-शाखा
- योजना तथा अनुगमन उप-शाखा
- सूचना तथा संचार प्रविधि उप-शाखा
- वडा कार्यालय
- सडक तथा अन्य पूर्वाधार विकास उप-शाखा
- भवन तथा वस्ती विकास उप-शाखा
- वातावरण तथा सरसफाइ उप-शाखा

डाटा क्लियर

सम्पादन गर्नुहोस्

Data Synchronize

डेटा सिंक

ब्याकअप

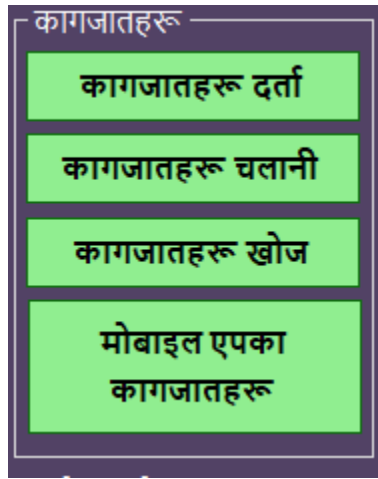
अपलोड

सिंक

Users can create their backup by clicking on the “Backup” button as well as upload their data by clicking on the “Upload” button. The documents uploaded by other users could be synced by clicking the “sync” button.

Documents

The DMS App currently handles incoming and outgoing documents.



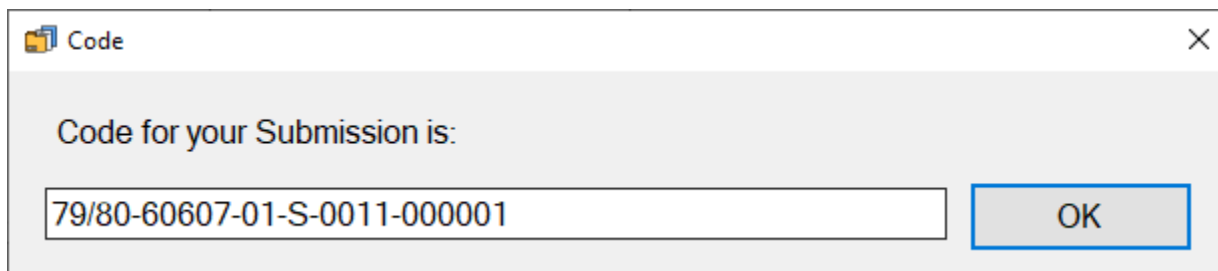
Clicking on “Darta” opens a form to carry the “darta” process of an incoming document whereas clicking on “Chalani” opens a form to carry the “chalani” process of an outgoing document.

Document Darta

Here users have to enter all the necessary details while users have the option to browse the document (PDF) or scan (physical document). Users can also enter the remarks of the document and enter its actual physical location in terms of room number, cabinet number, and compartment number. Users can also click the “Preview” button to preview the selected document. If the user clicks the “Clear” button, then

the data entered in that row will be cleared out. Users also can add passwords to the document by checking the “Confidential” check box.

After all the necessary details have been filled in, click the “Submit” button. A new window appears which will display the unique code for that document. This code is important for searching the document.



Document Chalani

Here users have to enter all the necessary details while users have the option to browse the document (PDF) or scan (physical document). Users can also enter the remarks of the document and enter its actual physical location in terms of room number, cabinet number, and compartment number. Users can also click the “Preview” button to preview the selected document. If the user clicks the “Clear” button, then the data entered in that row will be cleared out. Users also can add passwords to the document by checking the “Confidential” check box.

After all the necessary details have been filled in, click the “Submit” button. A new window appears which will display the unique code for that document. This code is important for searching the document.

Searching, Filtering and previewing the document

All the documents added will be displayed in the following window.

The screenshot shows the 'Search Document' interface. On the left, there are several filter groups:

- फिल्टर गर्नुहोस्**: Includes radio buttons for 'प्राप्त कागजातहरू' (selected) and 'प्रेषित कागजातहरू', and radio buttons for 'सामान्य' (selected) and 'फाइल गर्ने स्थान'.
- सामान्य**: Includes input fields for 'विषय', 'प्रकार', 'नाम', 'नागरिकता नम्बर', and 'फोन न.', along with dropdowns for 'दर्ता/चलानी न.', 'पत्र संख्या', 'कोड', and 'टेमना'.
- मिति**: Includes date pickers for 'आर्थिक वर्ष', 'मिति देखि', and 'मिति सम्म', and input fields for 'फाइल गर्ने स्थान', 'कोठा न.', 'म्याग्नेट न.', 'कम्पार्टमेन्ट न.', 'फाइलको नाम', and 'कैफियत'.

 On the right, a table displays search results with columns: 'विषय', 'नाम', 'फोन न.', 'दर्ता / चलानी न.', 'पत्र संख्या', and 'सेयर'. Below the table, there is a section with columns: 'क्र.सं.', 'फाइलको नाम', and 'पूर्विलोकन'.

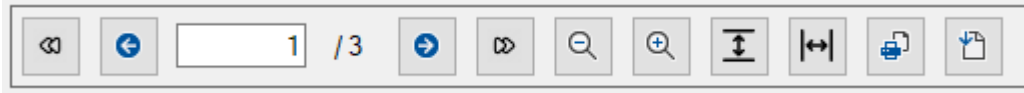
The filter group box has necessary attributes through which the user can filter the list of documents being displayed. Just select a necessary filter and write on the corresponding tagging parameter. The “Today’s Summary” button is used to export the information of today’s darta and chalani in the CSV file and “Export Search Result” is used to export the search result in the CSV file. If the user clicks the “Clear” button, the filtered list will be cleared out and the original list with all the documents will be displayed.

To view the details of the document, click on the row header (blank cell before SN column) of the list. This will display another list at the bottom with all the necessary actions.

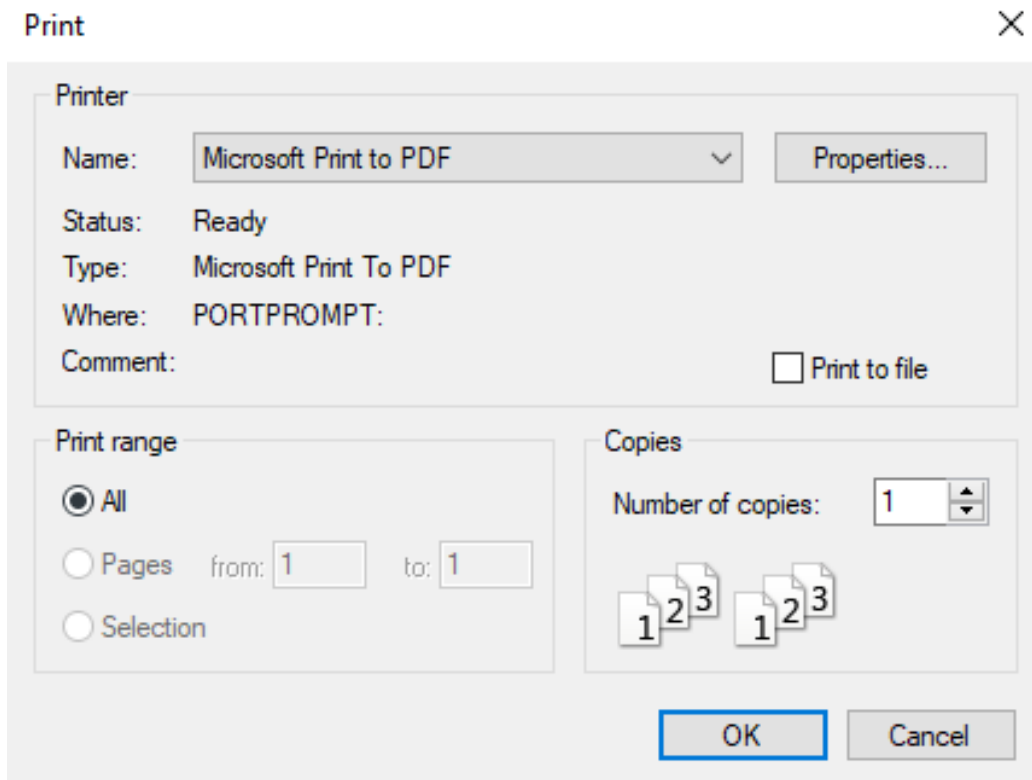
Users can click on “preview” to view the document.

Printing & downloading the document

At the top of the document preview panel, there is a group of buttons to control the viewing of the document. The last two buttons i.e., “Print” and “Download” buttons can be used to print and download the document that is currently being displayed in the preview panel.



Users can select the printing device and also change the printing setting.



Municipal Documents

Here municipality users can submit their documents to DMS. Users need to enter the name and description of the document and similar to the darta or chalani form, can browse or scan the document and submit it. Once the document has been submitted, the user can share the document with the Ward user by clicking the “Share” button on the list on the right-side table.

Ward users can use the sync option to fetch the documents shared by the municipality user. To search the municipal documents, the user can use the date, name and description field present in the form.

Municipal Documents

विवरण

कागजात विवरण

आर्थिक वर्ष मिति (वि सं)

नाम

विवरण

मिति

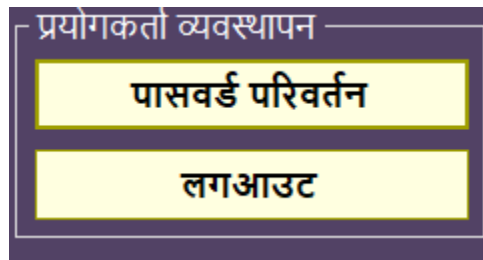
कागजातको प्रविष्टि

	फाइलको नाम	पुनः नामाकरण	डाटा क्लियर

नाम	सेयर स्थिति	सेयर	हेर्नुहोस्

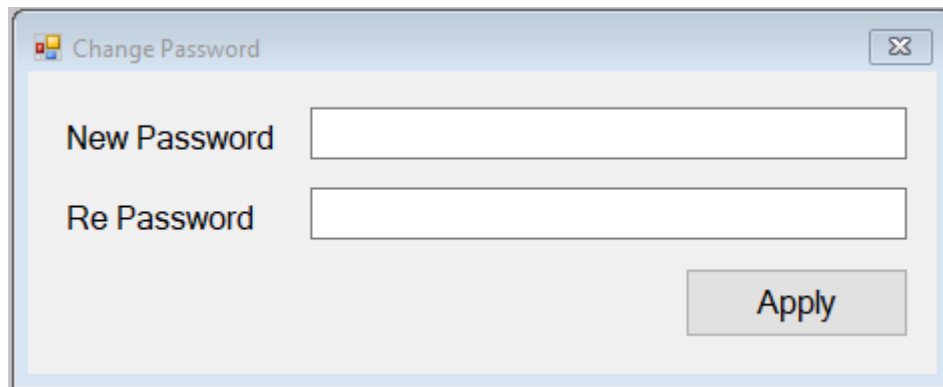
क्र.सं.	फाइलको नाम	पूर्वावलोकन

User Management



Change Password

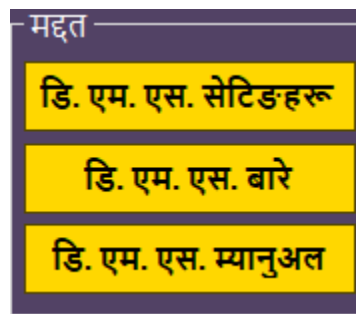
Users can change their password, just enter the new password two times and click “Apply”.

A screenshot of a "Change Password" dialog box. The dialog box has a title bar with a close button. It contains two text input fields: "New Password" and "Re Password". Below the input fields is an "Apply" button.

Login / Logout

Users can log in and log out of the DMS App using the second button in the group “User Management”.



Help



This section contains settings and information about the DMS App and the operation manual of the same.

About DMS ✕

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