### Amendment Logs

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<th>Version</th>
<th>Description</th>
<th>Author</th>
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<td>May, 2016</td>
<td></td>
<td>User Manual</td>
<td>eOffice Project Division</td>
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<td>August, 2019</td>
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Introduction

Knowledge Management System controls the life cycle of documents in an organization —i.e. how they are created, reviewed, published, and used. The term "management" implies top-down control of information. An effective knowledge management system should reflect the culture of the organization, flexible and controls documents’ life cycles of the document.

A well-designed knowledge management system promotes finding and sharing information easily. It organizes content in a logical way and makes standardized content creation and presentation across the 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 the 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 the 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; due to which the documents after few years 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 for documents to which all the department/ministry users can access. 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 the 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.
Admin Settings

Admin settings is an additional segment in KMs for administrator role, which facilitates different rights for users in creating documents, managing workflow, roles and sharing of documents in an organization.

To perform admin actions, go to the KMS application from the portal page and click on Admin Setting link as shown in Fig.1.

![Image of Admin Setting](image)

It comprises four modules:

a) User Role Mapping  
b) Content Types  
c) Content Metadata  
d) Admin Modules

Let’s learn about these modules one by one:
User Role Mapping
This module facilitates the admin in mapping the global roles to each individual user of an organization.

To map user with global roles, perform the following steps:

- Click on the **User Role Mapping** module. As a result, all the created user in eOffice of an organization will appear as shown in Fig.2.

- Select the global role corresponding to the username for mapping as shown in Fig.3.
Note:

User with User/Member role cannot access the Admin Module and also does not have the privilege to access Admin Setting section as shown in Fig.4
**Content Type**

This module allows the admin in creating types document in KMS application. The types of content created in this module appear as options while using **Create** option.

To create content types, perform the following steps:

- Click on the **Content Types** module as shown in **Fig.5**.

  ![Fig.5](image)

- As a result, created content types will appear. Click on the **List All** button to view all the content types. Also, a user can enter and search by clicking on **Search** button (Fig.5).

- To add a new content type, click on the **Add New** button as shown in **Fig.6**.

  ![Fig.6](image)
- Enter the details, check the **Activate** checkbox and click on the **Submit** button as shown in Fig.7.

![Fig.7](image)

- To change the status of the created content type, select the action as shown in Fig.8.

![Fig.8](image)
• Select the action from the drop-down menu and click on the Submit button as shown in Fig.9.

![Fig.9](image_url)

Note:

a) The types of content created in this module appear as options while using Create option as shown in Fig.10.

![Fig.10](image_url)

b) Click on Edit button to edit the details of the available content type.
c) Click on the **Delete (🗑️)** button to delete the created content types.

d) (✔️) states that the content type is in the **Active** state.

e) (❌) states that the content type is in **Inactive** state.
Content Metadata

Content Metadata module facilitates the admin in creating metadata for each content type. Content Metadata defines the basic fields appears in the form while creating different types of documents in KMS, which later also helps the user in locating a specific document and in filtering the data for generating reports.

To create metadata, perform the following steps:

- Click on the **Content Metadata** module as shown in **Fig.12**.

![Fig.12](image1.png)

- As a result, created metadata will appear. Click on the **List All** button to view all the metadata. Also, a user can enter and search by clicking on the **Search** button (Fig.12).

- To add a new metadata, click on the **Add New** button as shown in **Fig.13**.

![Fig.13](image2.png)
- Enter the details, check the Activate checkbox and click on the Submit button as shown in Fig.14.

Fig.14

Note:
User can define a metadata field as mandatory by selecting the checkbox corresponding to the Is Mandatory field.

- To change the status of the created metadata, select the action as shown in Fig.15.

Fig.15
Select the action from the drop-down menu and click on the **Submit** button as shown in **Fig.16**.

**Note:**

a) The added **Content Metadata** appears as options while using **Create** option as shown in **Fig.17**.

b) Click on **Edit** button to edit the details of the available metadata.
c) Click on the **Delete** button to delete the created metadata.

d) **✓** states that the metadata is in the **Active** state.

e) **✗** states that the metadata is in **Inactive** state.
Admin Modules
Category
This option facilitates the admin in creating new categories for the document. Also, it allows the admin to change the status of the existing category of the document like VIP, General, Non-Technical, others etc.

To add new Category, perform the following steps:

- Click on the **Category** module as shown in **Fig.19**.

  ![Fig.19](image)

- As a result, created categories will appear. Click on the **List All** button to view all the categories. Also, a user can enter and search by clicking on the **Search** button (Fig.19).

- To add a new category, click on the **Add New** button as shown in **Fig.20**.

  ![Fig.20](image)
• Enter the details, check the **Activate** check box and click on the **Submit** button as shown in **Fig.21**.

![Fig.21](image)

• To change the status of the created categories, select the action as shown in **Fig.22**.

![Fig.22](image)
Select the action from the drop-down menu and click on the **Submit** button as shown in Fig.23.

**Fig.23**

**Note:**

a) The created categories appear as options for the corresponding **Category** metadata field as shown in Fig.24.

**Fig.24**

b) Click on **Edit** button to edit the details of the available categories.
c) Click on the **Delete** button to delete the created categories.

d) **(✓)** states that the category is in the **Active** state.

e) **(✗)** states that the category is in **Inactive** state.
Audience
This section facilitates the admin in creating new audience type and also allows in changing the status of the existing audience type.

To add new Audience, perform the following steps:

- Click on the Audience section under Admin Module, as shown in Fig.26.

- As a result, the created audience will appear. Click on the List All (List All) button to view the entire list. Also, a user can enter and search by clicking on the Search (Search) button (Fig.26).

- To add a new audience, click on the Add New (Add New) button as shown in Fig.27.
• Enter the details, check the **Activate** checkbox and click on the **Submit** button as shown in **Fig.28**.

![Fig.28](image)

• To change the status of the created audience details, select the checkbox corresponding to the Audience Name as shown in **Fig.29**.

![Fig.29](image)
- Select the action from the drop-down menu and click on the Submit button as shown in Fig.30.

![Fig.30]

Note:

a) The created audience appear as options for the corresponding Audience metadata field as shown in Fig.31.

![Fig.31]

b) Click on the Edit button to edit the details of the available audience detail.
c) Click on the **Delete** button to delete the created audience detail.

d) ![Check Mark](image) states that the audience name is in the **Active** state.

e) ![X Mark](image) states that the audience name is in **Inactive** state.
Type
This section facilitates the admin in creating new document type. Also, it allows in changing the status of the existing type of the documents like letters, circulars, and orders etc.

To add new Type, perform the following steps:

- Click on the **Audience** section under **Admin Module**, as shown in [Fig.33](#).

- As a result, the created document types will appear. Click on the **List All** button to view the entire list. Also, a user can enter and search by clicking on the **Search** button (Fig.33).

- To add a new document type, click on the **Add New** button as shown in [Fig.34](#).
• Enter the details, check the **Activate** checkbox and click on the **Submit** button as shown in **Fig.35**.

![Fig.35](image)

• To change the status of the created document type details, select the checkbox corresponding to the Type Name as shown in **Fig.36**.

![Fig.36](image)
Select the action from the drop-down menu and click on the **Submit** button as shown in Fig.37.

**Fig.37**

**Note:**

a) The created type appear as options for the corresponding **Type** metadata field as shown in Fig.38.

**Fig.38**

b) Click on the **Edit** button to edit the details of the available document type detail.
c) Click on the **Delete** button to delete the created document type detail.

d) ** states that the document type is in the **Active** state.

e) ** states that the document type is in **Inactive** state.
Language
This section facilitates the admin to create a new language and also allows in changing the status of the existing language like English, Hindi etc.

To add new Language, perform the following steps:

- Click on the Language section under Admin Module, as shown in Fig.40.
- As a result, the created languages will appear. Click on the List All button to view the entire list. Also, a user can enter and search by clicking on the Search button (Fig.40).
- To add a new language, click on the Add New button as shown in Fig.41.
• Enter the details, check the **Activate** checkbox and click on the **Submit** button as shown in **Fig.42**.

![Fig.42](image1)

• To change the status of the created language details, select the checkbox corresponding to language name as shown in **Fig.43**.

![Fig.43](image2)
Select the action from the drop-down menu and click on the **Submit** button as shown in **Fig.44**.

**Fig.44**

**Note:**

a) The created language appears as options for the corresponding **Language** metadata field as shown in **Fig.45**.

**Fig.45**

b) Click on the **Edit** button to edit the details of the available language.
c) Click on the **Delete** button to delete the created language.

d) (✓) states that the language is in the **Active** state.

e) (✗) states that the language is in **Inactive** state.
Extensions
This section allows the application to upload the types of document in KMS. An admin can add a new extension to the list and also allows in changing the status of the existing extensions detail.

To add a new extension, perform the following steps:

- Click on the Extension section under Admin Module, as shown in Fig.47.

![Fig.47]

- As a result, the created extensions will appear. Click on the List All button to view the entire list. Also, a user can enter and search by clicking on the Search button (Fig.47).

- To add a new extension for the document, click on the Add New button as shown in Fig.48.

![Fig.48]
• Enter the details, check the **Activate** checkbox and click on the **Submit** button as shown in Fig.49.

![Fig.49](image)

• To change the status of the created extension, select the checkbox corresponding to extension code name as shown in Fig.50.

![Fig.50](image)
• Select the action from the drop-down menu and click on the Submit (Submit) button as shown in Fig.51.

![Fig.51](image)

Note:

a) Click on the Edit( Edit) button to edit the details of the available extension.

![Fig.52](image)

b) Click on the Delete( Delete) button to delete the created extension.

c) ( ) states that the extension is in the Active state.

e) ( ) states that the extension is in Inactive state.
Admin Module

Document Reports
This section facilitates the admin in recognizing the count of various types of documents created in KMS application (Central Document). Also, an admin can determine the count of documents created by the admin itself (My Documents) and by the individual users using KMS application.

To generate the report, perform following steps:

- Go to the Admin Module and click on the Document Report section as shown in Fig.53.

- As a result, count of various types of documents under different Content Type (Folder, Link, Document) will open (Fig.53).

- To search the count of documents created by an individual user, enter the username in User filed as shown in Fig.54.

Fig.53

Fig.54
Also, admin can generate a report on the basis of the date by selecting **Modified From** and **To** date as shown in **Fig.55**.

**Fig.55**

**Note:**

a) Here, **My documents** section states that the documents are created by the admin itself and are in private state.

b) **Central Document** section gives the total count of documents created under different Content Types(Folder, Link, Document).
Priority Notice
This option facilitates the admin to set the priority level for the documents published in KMS application. Admin can assign priority to any document, change the existing priority of the document.

To set the priority of a document, perform following steps:

- Click on the **Priority Notice** under **Admin Module**, as shown in **Fig.56**.

- As a result, by default **Set Priority Notice** section will open containing published document list (**Fig.56**).

- To set priority, click on the **Make Priority Notice** button as shown in **Fig.57**.

![Fig.56](image)

![Fig.57](image)
• A pop-up window will open, select the **Display Order** sequence, **Last Date** for the visibility of the notice and click on the **Save** button as shown in **Fig.58**.

![Fig.58](image)

**Note:**
Priority section contains documents, which are in published state and are not a part of any folder.

• Notice will be added to the Existing Priority section as shown in **Fig.59**.

![Fig.59](image)

**Note:**

a) **Display order** represents the priority of the notice and, the **Last Date** represents the validity of the notice priority.

b) On removing the notice from the existing priority section, notice moves back to the **Set Priority Notice** section.
Trash
This section contains all those documents/folder/links which are deleted by the admin. Trash section also facilitates in restoring the files.

To perform the actions on Trash section, perform the following steps:

- Click on the **Trash** section and select the document/folder as shown in Fig.60.

![Fig.60](image1)

- Click on the **Delete (🗑️)** button to permanently delete the document/folder as shown in Fig.61.

![Fig.61](image2)

- Click on the **Restore (🛠️)** button to restore the document/folder to its original place, (Fig.61).