# Table of Content

Introduction ........................................................................................................................................... 3

What Knowledge Management System Offers? .................................................................................. 4

Create........................................................................................................................................................ 5
  Document .................................................................................................................................................. 6
  Online Document ..................................................................................................................................... 7
  Quick upload ........................................................................................................................................... 7
  Folder ....................................................................................................................................................... 9
  Link .......................................................................................................................................................... 10

Privileges to view a Document/Folder/Link ............................................................................................ 11

Roles & Rights for KMS Users created Document .................................................................................. 12
  With General User ................................................................................................................................... 12
  With Content Manager/Folder Administrator ......................................................................................... 13
  With KMS Admin or Super User ................................................................................................................ 14

Sharing Document/Link ............................................................................................................................. 15

Search.......................................................................................................................................................... 17

Advance Search .......................................................................................................................................... 18

KMS User Module..................................................................................................................................... 19
  Inbox ....................................................................................................................................................... 20
  Central Docs ........................................................................................................................................... 21
  My Docs .................................................................................................................................................. 22
  Contact Book .......................................................................................................................................... 23

Managing Documents - Actions menu ....................................................................................................... 25
Introduction

Knowledge Management System controls the life cycle of documents in your organization — 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 you use for knowledge management should be flexible, allowing you to tightly control documents' life cycles if that fits your enterprise's culture and goals, but also letting you implement a more loosely structured system if that better suits your enterprise.

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

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, create documents from scratch, and download them.
- Edit documents online simultaneously with anyone you choose, and invite others to view them.
- Create Documents using advanced online editor.
- Create Links.
- Advanced Editing Support using Check out and Check in Options.
- MIS Reports for Administrators.
- Folder Subscriptions for easy navigation.
- Centralized Document Repository with folder wise categorization.
- Keep track of who made changes to a document and when, and roll back to any version.
- Publish documents online to other users.
- Upload new Images and Videos, edit and can share with anyone.
- Manage subscriptions and sharing of Docs.
Create

This section helps the user to create a Document, Quick upload of file, Online Documents, Link and Folder. A document/Link can be created by clicking on Create button.

A user can create following Document/Link:

- Document
- Online Document
- Quick Upload
- Folder
- Link

Let's learn about these modules one by one
Document: This link helps the user to create/upload a new document.

---

**The steps to create a Document are as under:**

**Step 1:** Click on Create link to create a Document by clicking on Document option from the horizontal menu bar.

**Step 2:** As a result Enter Document Detail page appears as shown above in Fig.KMS.1a.

**Step 3:** Enter the description Of the Document in the given text field.

**Step 4:** Click on Browse button / Choose File button to browse & upload the file.

- Title and Browse field are mandatory fields and should not be left blank.
- Files to be uploaded must be in .txt, .docx, .doc, .pdf, .jpeg, .gif, .xls, .xlsx, .ppt and zip format.

**Step 5:** Choose the highlighted fields and enter the data on it.

**Step 6:** Click on save button to save the details.
Online Document: Online Document link helps the user to create an online document. It has a feature of online editor where a user can set the font, color of the document content alignments etc.

The steps to create an Online Document are as under:

Step 1: Click on Create link to create an Online Document. We can create an Online Document from horizontal menu bar by clicking on Online Document option. As a result, Enter online Document Detail page appears as shown above in Fig.KMS.1b.

Step 2: Enter the Title of the Document in the given text field.

Step 3: Enter the Description of the Document in the given text field.

Step 4: Add the content of the Online Document.

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

Step 5: Click on Save button to save the details.

  - User can click on ( ) button to enter other details of an online document, such as Type, Category, Keyword, Author, Audience, Language etc.
  - There is no mandatory field as user can save a blank online document.
  - By Default, Blank online document is saved with Title Name as ‘Title’.

Quick upload: This link helps user to upload a document with the suitable Title.
The steps to create a Quick upload Document are as under:

**Step 1:** Click on Create link to create a Quick Upload. We can create a Quick Upload from horizontal menu bar by clicking on Quick Upload document option, As a result Enter Quick Upload Detail page appears as shown above in Fig.KMS.1c.

**Step 2:** Enter the Title of the Document in the given text field.

**Step 3:** Click on Browse button / Choose File button to upload a document or File.

**Step 4:** Click on save button to save the details.

- *Title* is a mandatory field and can’t be left blank.
Folder: This link helps the user to create a new Folder.

The steps to create a Folder are as under:

Step 1: Click on Create link to create a Folder. We can create a Folder from horizontal menu bar by clicking on Folder option, As a result Enter Folder Detail page appears as shown above in Fig.KMS.1d.

Step 2: Enter the Title of the Document in the given text field.

Step 3: Enter the content of folder in the Description field.

Step 4: Click on save button to save the details.

*Title* is a mandatory field and can’t be left blank.
**Link:** This link helps the user to create a new link.

![Link screenshot](image)

**Fig.KMS.1e**

---

**The steps to create a Link are as under:**

**Step 1:** Click on **Create** link to create a Link. A user can create a Link from horizontal menu bar by clicking on Link option, As a result **Enter Link Details** page appears as shown above in Fig.KMS.1e.

**Step 2:** Enter the Title of the Document in the given **Title** field.

**Step 3:** Enter the content of folder in the **Description** field.

**Step 4:** Enter the Link Details in the **Linkurl** field.

**Step 5:** Click on **save** button to save the details of Link URL.

- **Title** and **Linkurl** fields are mandatory fields and should not be left blank.
Privileges to view a Document/Folder/Link

After uploading or saving a document Privileges has been assigned for a Document/Link.

1) No Change: The document will remain in Default state or Private state and can be viewed by the Admin and the owner who has created the document.
   - By Default, a Document/Link is in the ‘Private State’ or ‘No Change’ state unless and until a user will assign different privileges to the document.
   - A User and Admin both have privilege to view and access to ‘No Change’ state.

2) Make Visible/Do not Publish in Notice Board: The document will be visible to all users but can’t be viewed on the Notice Board as Admin has not published the document.
   - Only Admin can have privilege to view and access to ‘Make Visible/Do not Publish in Notice Board’ state.

3) Submit for Publication/ Making Visible: The document will be visible to all users as well as viewed on the Notice Board as Admin has published the document.
   - In User Login, A user can view only have rights to access ‘Submit for Publication’ state but Admin have rights to view ‘Submit for Publication/ Making Visible’ state.

4) Publish in Notice Board: The document will be published by the Admin.
   - Only Admin can have privilege to view and access to ‘Publish in Notice Board’ state.

5) Send back/Reject/Make Private: Only Admin will have rights to Reject/Send Back/Revert a document/Link.
   - Only Admin can have privilege to view and access to ‘Send back/Reject /Make Private’ state.
Roles & Rights for KMS Users created Document

With General User

General users are the common users of the KMS application. The Privileges assigned to **General Users** are:

1. Create Document/Folder/Link in My Docs Folder.
2. View Document/Folder/Link
3. Edit/Modify a Document/Folder/Link
4. Add comment to a Document/Folder/Link

**Change State Rights:**

5. Submit for Publication
6. Private State

<table>
<thead>
<tr>
<th>Roles</th>
<th>Create Docs in Central Doc</th>
<th>Create Docs in My Doc</th>
<th>View</th>
<th>Edit</th>
<th>Submit for Publication</th>
<th>Private State *</th>
<th>Send back/Reject / Make Private</th>
<th>Publish in Notice Board</th>
<th>Make Visible/Do Not Publish</th>
<th>Publish Externally</th>
<th>Reviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>General User</td>
<td>×</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>General User only have viewing rights</td>
</tr>
<tr>
<td>Content Manager</td>
<td>×</td>
<td>×</td>
<td>√</td>
<td>×</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>×</td>
<td>Depends on Privileges assigned by KMS Admin</td>
</tr>
<tr>
<td>KMS Admin or Super User</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>KMS Admin have full authority /privileges</td>
</tr>
</tbody>
</table>

*Private state specifies the state in which only Owner or user who has created the document have privilege to View and To Edit the document.*
With Content Manager/Folder Administrator

KMS Admin/Super User will provide access to the specific folder to Content Manager. All the Privileges assigned to General User are with depending upon the KMS Administrator as:

The Content Manager has all the Privileges that a General User have, along with it a content manager has following rights:

1. Create Document/Folder/Link in Central Docs.

Change State Rights:
It depends on the authority delegated by KMS Administrator to the Content Manager.

2. Send back/Reject/Mak e Private
3. Make Visible/Do not Publish
4. PublishExternally
5. Publish in Notice Board

Role and Rights mapping w.r.t Content Manager created Document

<table>
<thead>
<tr>
<th>Roles</th>
<th>Create Docs in Central Doc</th>
<th>Create Docs in My Doc</th>
<th>View</th>
<th>Edit</th>
<th>Submit for Publication</th>
<th>Private State</th>
<th>Send back/Reject / Make Private</th>
<th>Publish in Notice Board</th>
<th>Make Visible/Do Not Publish</th>
<th>Publish Externally</th>
<th>Reviews</th>
</tr>
</thead>
<tbody>
<tr>
<td>General User</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>×</td>
<td>General User only have viewing rights</td>
</tr>
<tr>
<td>Content Manager</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>Depends on Privileges assigned by KMS Admin</td>
</tr>
<tr>
<td>KMS Admin or Super User</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>√</td>
<td>KMS Admin have full authority /privileges</td>
</tr>
</tbody>
</table>

- Content Manager will be granted access to specific Folder by the KMS Administrator, Only then content manager able to get privileges of Change State rights as well as Document Creation rights to that specific Folder.
- If Document is in the Private state then only owner of document can view the document.
- If the Document is in the Make Visible/Do Not Publish state then normal users other than Owner can view the document.
With KMS Admin or Super User

KMS Admin has fully fledged privileges which a General User and a Content Manager/Folder Admin have, to access and ‘Create Document’ along with the ‘Change State’ rights.

KMS Admin/Super User will provide access to the specific folder to Content Manager.

- KMS Administrator has fully fledged privilege of Admin rights of KMS.
Sharing Document/Link

Sharing of Document/Link facilitates a user to view all the Documents/Online Documents/Folder or Links that are shared with the user.

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

Step 1: Move the mouse cursor on the document/link which needs to be shared and right click the mouse, Select the Share option as shown in Fig.KMS.2.

![Fig.KMS.2](image)

Step 2: As a result ‘Sharing’ page appears as shown in Fig.KMS.3

![Fig.KMS.3](image)

Step 3: Enter the User Name or a matching string in the Search bar corresponding to Search User field in Search User/Group section.

Step 4: Click on the combo box correspondingly to filter the search to options All User/My Group/My Contacts.
Step 5: Click on the Add User button to add all User/Group. All the added users can be viewed in Selected User/Groups List.

Step 6: A user can provide privilege to View/Edit/Review etc to the added users.

Step 7: Click the Share button as a result the selected document gets shared with the selected group of users with the assigned access rights.
Search

This section helps the user to search any kind of **Document/Online Document/Link or Folder** whether it is text file, doc file, pdf file etc. can be filtered on basis of **Type of Document**, and **Modified Time**.

![Fig.KMS.4](image)

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

**Step 1:** Enter the file name or a matching string in the Search bar corresponding to Search User field in Search User/Group section.

**Step 2:** Move mouse cursor on the document/link which needs to be shared and click on the selected document

**Step 3:** As a result selected document will open along with the document details as shown in Fig.KMS.5.

![Fig.KMS.5](image)
Advance Search

To access the advance Search Minimum 3 characters are required. User can search the required document/link or Folder by clicking the ‘Advance Search’ link provided also which includes fields like searching by Title, Type, Category, Description, Language, Audience, Keywords etc. Out of all these advance search fields, filling up of any one field is mandatory to search the required document.
KMS User Module

KMS User Module has four sections:

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

Let's learn about these sections one by one:
Inbox

Inbox is the repository which contains latest incoming documents. A user can create Documents/Quick Upload/Online Document/Files in a Folder and Links in Inbox. Different modules available under Inbox are shown in Fig.KMS.1.

Let's learn these sub modules one by one.

**All Recent:** This module facilitates the user to find any Document, Online Document, Files in a Folder or Links that are created under 'My Docs' and all other documents which are published by Admin.

- **In All Recent section User can’t view created Folder, User can only view & access files in a folder.**

**Shared:** This module facilitates the user to view all the Documents/Online Documents/Folder or Links that are already shared with the user.

**Pending:** This module facilitates the user to view all the Documents/Online Documents or Links that are pending in status i.e. the documents which are not published by the admin so far.

**Subscribed:** This module facilitates the user to view all the Documents/Online Documents/Folders or Links that are subscribed to keep a track of all changes.

**Published:** This module facilitates the user to view all the Documents or Links that are published by the admin already.

**Email:** This module facilitates the user to view NIC mails and move their NIC email and attachments (if any) to 'My Doc’ Section and Inbox.
Central Docs

**Central Docs** helps all the users to view the Documents/Folders or Links that are created and published by admin. (Fig.KMS.2)

- This library is the common for all the users and they use it on the basis of the access rights given to them.
- Only Admin can create Document/Folder/Link in Central Docs.

The steps to create a Documents/Online Documents/Folder or Links in Central Document are as under:

**Step 1:** Click on Central Docs link to create Documents, Online Documents, Folders, and Links.

**Step 2:** Click on Create button to create Documents, Online Documents, Folders, and Links.

**Step 3:** Follow the same steps for the Creation of Documents/Online Documents/Folders and Links as mentioned above.

**Step 4:** Enter the data in essential metadata fields and click on save button.

**Step 5:** The document can be viewed in admin login Inbox -> All Recent and Central Docs link.
My Docs

My Docs is a personal user library which contains all documents and folder created by the user himself. My Docs is separate for each and every user. (Fig.KMS.3)

- This library varies from user to user as it contains documents created by user himself through their personal Login.

![Fig.KMS.3](image)

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

**Step 1:** Click on My Docs link to create Documents, Online Documents, and Folders and Links.

**Step 2:** Click on Create button to create Documents, Online Documents, Folders, and Links.

**Step 3:** We can create a Document/Online Document/Folder/Link from horizontal menu bar by clicking on required option.

**Step 4:** As a result Detail page appears. Enter the data in essential metadata fields and click on save button.

**Step 5:** The document can be viewed in user Inbox -> All Recent and My Docs link.
Contact Book

Contact Book facilitates the user to create new contact list and groups that helps the user while sharing any document/file. It makes easier for the user to share a document/file with a list of users simultaneously. (Fig.KMS.4)

![Contact Book](image1)

**Contact Book contains 2 tabs:**

1. Contacts
2. Groups

Let's learn about these tabs one by one:

1. **Contacts:** This tab helps the user to add/delete users to/from the contact list.

![Contacts](image2)
2. **Groups**: Groups specify collection of individuals who have regular contact and frequent interaction, mutual influence and who work together to achieve a common set of goals.

![Fig.KMS.6](image)

**The steps to add new group are as under:**

**Step 1**: Click on Contact Book link.

**Step 2**: Click on Groups tab to Add/Remove a group.

**Step 3**: Go to Add New Group block, enter the value corresponding to Enter Name of Group field.

**Step 4**: Click on **Add New Group** button to add new group in the Group List.

**Step 5**: Group name has been added successfully and can be viewed in Groups and My Groups block.
Managing Documents - Actions menu

There are few options available under Actions Menu of Documents, Online documents and Links which help the user to perform various tasks on selected document. Fig.KMS.7 shows various options available under Action Menu

![Action Menu](image)

Fig.KMS.7

Various options available under Action menu are:

- **Share**: It helps the user to share the document or link with other user or group of users and give access rights accordingly as per requirement.

- **Edit**: It helps the user to edit the selected document depending upon the access rights assigned. User can edit the document details, Publishing status, Alerts or Other details depending upon the requirement.

- **Delete**: It helps the user to delete the document depending upon the access rights assigned.

- **Rename**: It helps the user to rename the document or link depending upon the access rights assigned.

- **Cut**: Cut means to move a section of text from one place to another. This is a way to delete the text. Data is not lost in this case.

- **Copy**: To copy a piece of data to a temporary location. For example, Copying refers to duplicating a section of a document and placing it in a buffer (sometimes called a clipboard).

- **Paste**: It facilitates the user to embed a piece of data in a particular document from a temporary location.
- **Change Status**: It facilitates the user to change the current state of the existing document/link details according to the privileges assigned to the user. E.g.: Document states are Submit for publication, Make Visible/Do Not Publish, Publish in Notice Board, Publish Externally (GOffice/Website) etc.

- **Download**: Helps the user to download the document depending upon the access rights assigned.

- **Under Online Document**, user has ‘Details’ option to view the details while under **Link**, user has ‘Open URL’ option is available to open the Link URL.

- **History**: Helps the user to view the history of that selected Document/link depending upon the access rights assigned.

- **Check-Out**: It facilitates the user to create a working copy of existing document and make modifications (editing) on the by locking the original document, so that no other user will be able to modify the original document.

- **Once the copy is created by clicking the CHECK-OUT option, the original document is locked and cannot be edited.**

- **Check in**: It facilitates the user to replace the existing doc with working copy by unlock the document of existing document and make modifications (editing) in the Working Copy on the by locking the original document, so that no other user will be able to edit the original document.

- **Subscribed**: The term **Subscribed** facilitates the user to view all the Documents/Online Documents/Folders or Links that are subscribed to keep a track of all changes.

- **Comment**: The term **Comment** specifies a written note or reviews related to a document.

- **Set Expiry**: It facilitates the user to set the expiry on any document/link depending on the privileges assigned to the user. Once the Document is expired, then the shared users cannot see the content part of the document.

- **Audit Log**: It facilitates the user to keep track of activities (Username, Activity Time, IP Address, and Activity) and maintain a log done on documents/Link by the user.
eOffice Project Division
National Informatics Centre
Department of Electronics and Information Technology
Ministry of Communications and Information Technology
A-Block, CGO Complex, Lodhi Road, New Delhi - 110003 India