BIOBORD MANUAL 4

Document Management System

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1. Briefing

Document management systems (DMS) can be considered as a modern way of storing documents. The main benefit of DMS is to reduce the amount of paper and share important documents with users. In addition to before mentioned benefits, DMS also provides an effective way to search the content of the documents. DMS is integrated as a part of Biobord platform and this document goes through the most essential features of the DMS.

2. Uploading a New Document

To add a new document to DMS, you first need to access the document upload wizard tool. This tool can be accessed through New document button under the Documents menu as presented in Figure 1.
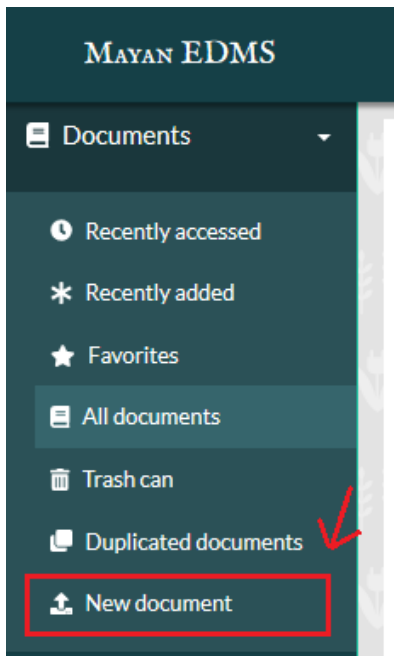

Figure 1. New document button

Document upload wizard contains the following four phases:

1. Document type selection
2. Tags selection
3. Cabinet selection
4. Document language setup and document upload

Document must only have one type selected. This field is required and cannot be skipped. Document types in DMS mirror the type of physical copy of the document they represent.

Tags are optional and can be skipped. Tagged document can be searched by its tags. This is useful for example if someone wants to show all documents under some particular tag. Documents can have several tags.

Cabinets are used to organize documents. Cabinets may be considered as folders of documents where all documents related to some project or theme reside within same cabinet. This phase can be skipped, but it is highly recommended to add document to at least one cabinet. Document can be placed to multiple cabinets if necessary.

At the final phase, document language is set before document upload. The selected language should match the language of the actual document, which will be uploaded. Language setting is used by several subsystems of DMS such as the Optical Characted Recognition when interpreting the document.

After selecting the appropriate language for the document, either click the upload box to search the document from your computer or drag and drop the document to the box. After successful upload, the document will be presented among all other documents in DMS.

3. Searching a Document

Search feature can be found from the dashboard view of the DMS. Dashboard view can be accessed by clicking the Mayan EDMS logo in the upper left corner of the screen. You should now have the dashboard view like presented in Figure 2.
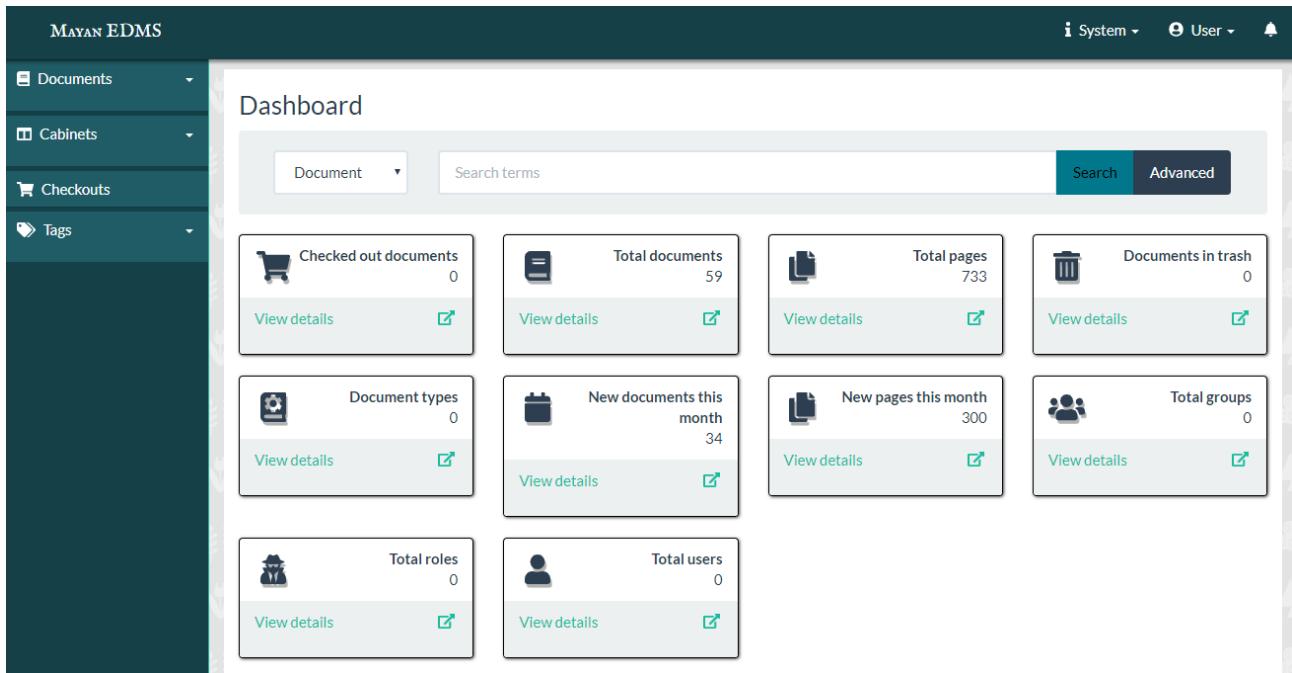

Figure 2. Search field in dashboard view

Before entering the keywords for the search, select what type of objects your search is allocated to. Object type can be any of the following: Cabinet, Document, Document page, Group, Metadata type, Role, Tag or User.

If Document is selected as an object type, keyword entered to the search field will be searched inside all the documents stored in the DMS. This is done by using the OCR feature, which transforms the document text in to the raw text which can then be easily searched. Please note that there will be a greater delay in displaying the search results if document content is searched compared to other object types because the search algorithm has to go through all stored documents and the content of documents with transformation. Search result presentation is different for each object type.

4. Document Properties

DMS provides several actions that can be performed for each stored document. These actions can be found under the document properties page. To access the document properties, click the document you prefer like presented in Figure 3. Document properties can be accessed through any of the views which shows documents (for example the All documents or search results views).
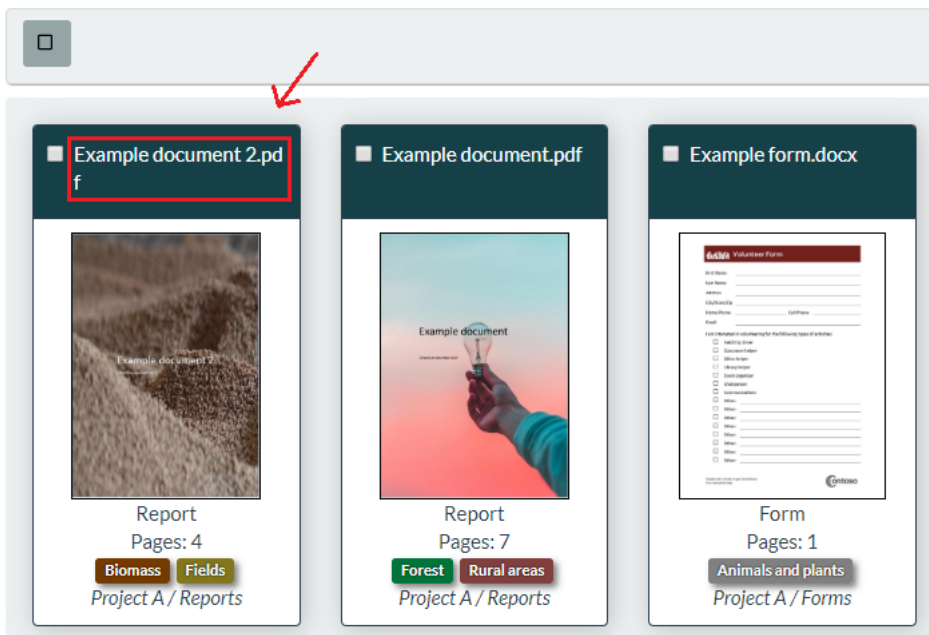

Figure 3. Accessing document properties

In document properties, the document preview is displayed as a default like presented in Figure 4.

Figure 4. Document properties view

5. Favorite documents

Favorites menu is a quick way to access documents that user needs frequently. Document is added to favorite documents by selecting document from any of the document presentation views (for example All documents or search results). Figure 5 presents the way of adding documents to favorites.

First user must select at least one document which will be added to favorites. After selecting at least one document from the view, bulk actions menu appears to the right. Under this menu select the action called *Add to favorites*.
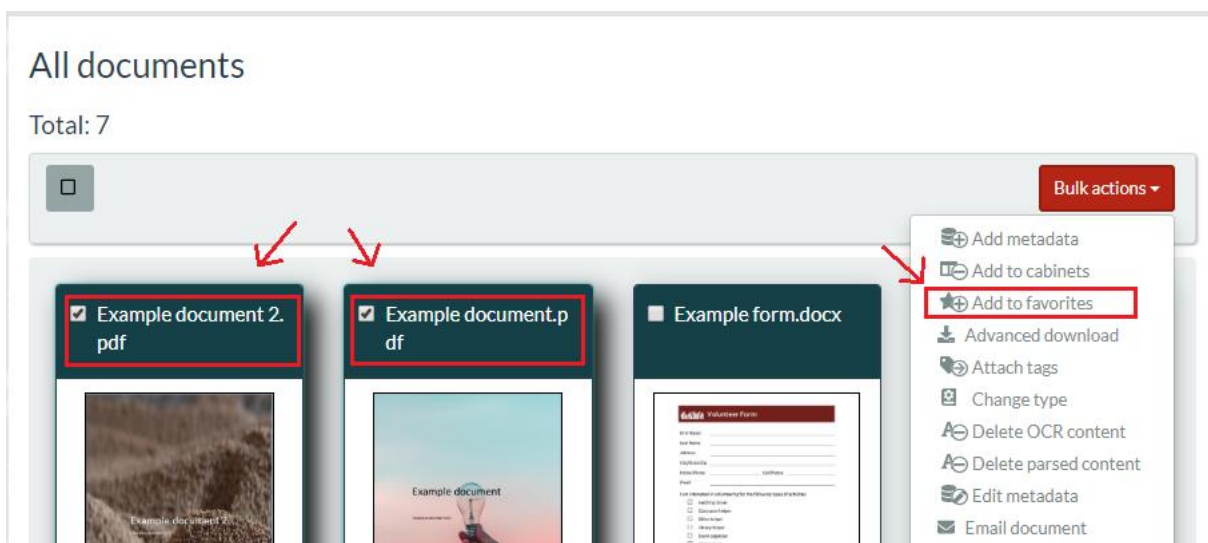

Figure 5. Adding documents to favorites

Favorite documents can be found from *Favorites* view under the Documents menu. User may remove any document from *Favorites* view by selecting the document and then from *Bulk actions* menu *Remove from favorites* action must be selected.

6. Deleting a Document

To delete a document, user must go to All documents view. Document deletion is performed in two phases. First, the document is moved to the trash can (see Figure 6). This means that document is not permanently deleted from the DMS. If you want to delete the document permanently, enter the trash can view under the Documents menu from the left side of DMS.
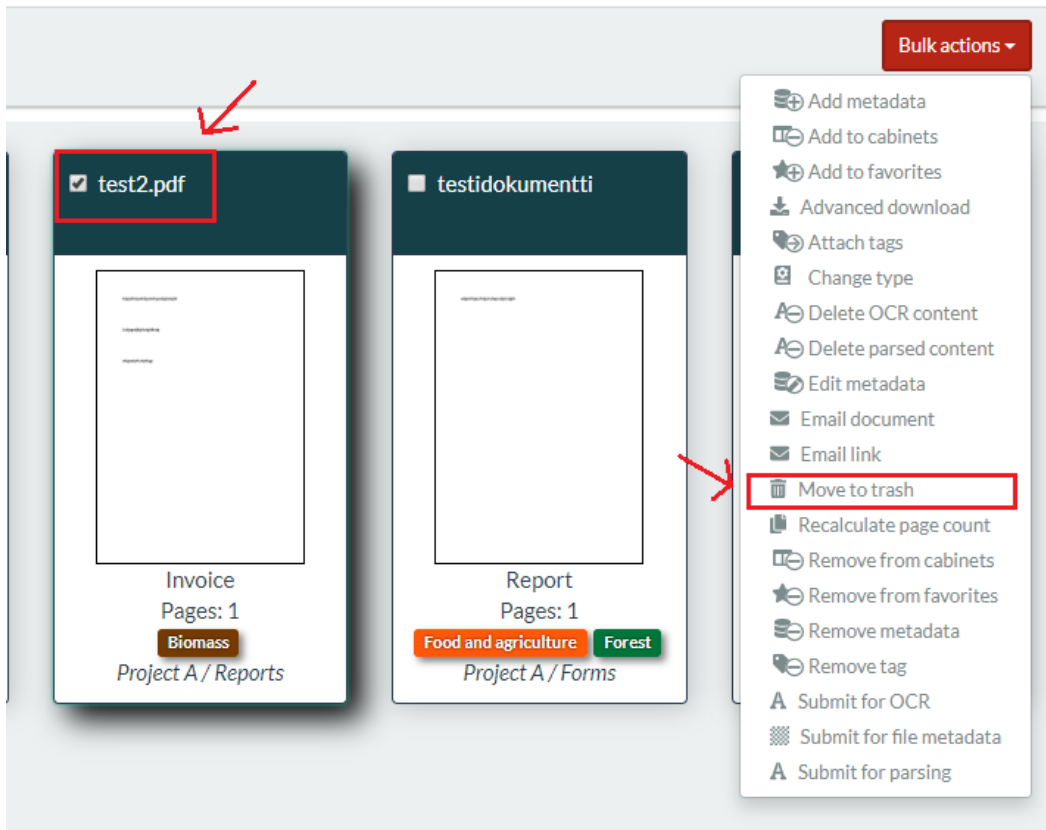

Figure 6. Moving a document into the trash

Trash can view is presented in Figure 7. The document must be first selected from this view. After selecting the document, the button called *Bulk actions* will appear to the right. Under this button you can select to either permanently delete the document or restore the document back to where it was located before moving it to the trash.
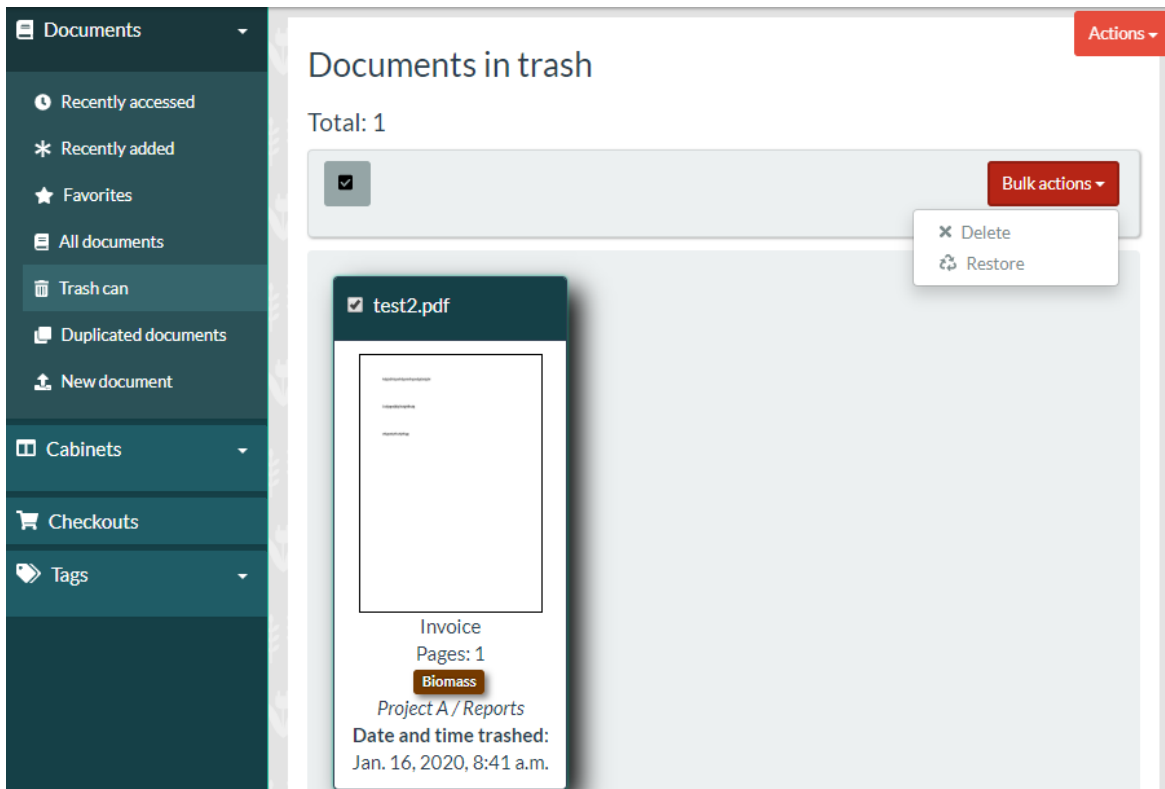
Figure 7. Trash can view

7. Linking a Document

Documents can be linked outside the DMS by providing a document's web address (url). Document address can be retrieved by first selecting a document and then copying the content from the web browsers address field (see Figure 7).
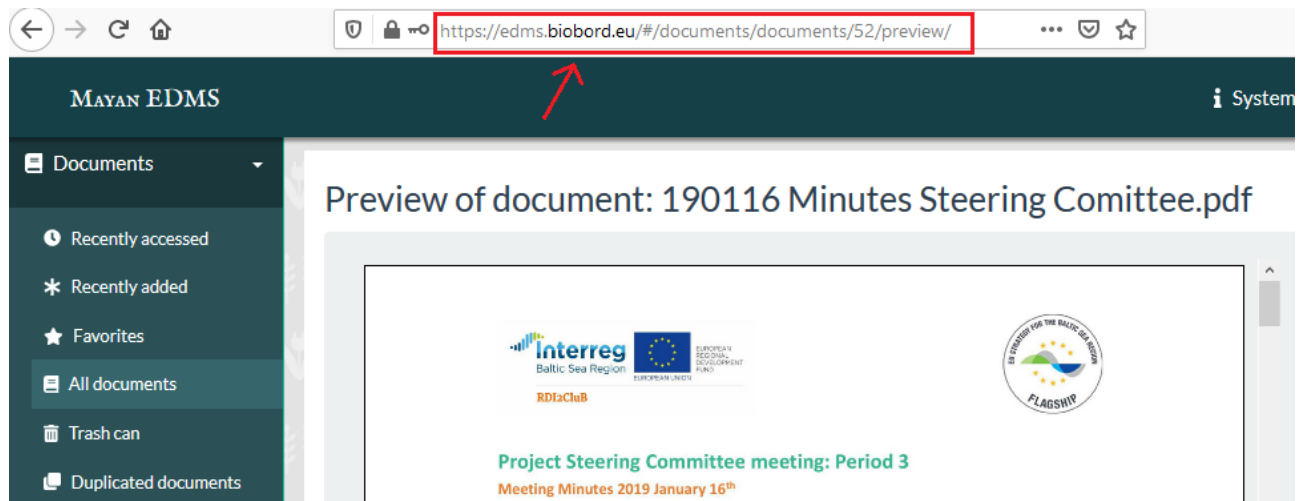

Figure 7. Document web address

This link can now be copied to the discussion forum for example. User who clicks the link of the document will be redirected to the document properties view if the following conditions are met:

- User is logged in to the Biobord platform and
- User has access rights to the cabinet where the document is stored or if document has no cabinet defined, has access rights to the document itself.