Document management system "DocumentLite"

User Manual

Content

Introduction

The document management system "DocumentLite" is intend for the process automation of the document circulation in the organization and gives users the following possibilities:
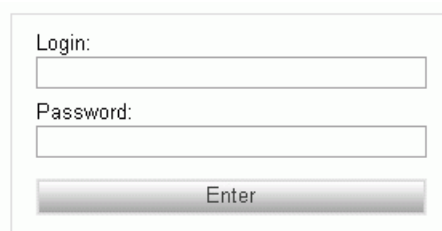
- documents registration
- documents moving among the staff
- documents coordination
- control of the document moving and other tasks during the coordination process
- search of the documents in the system

The user can execute one or more functions during operation with the documents in the system "DocumentLite":

- *the document creator* - the person who "Created" the document in the system. He appoints *the document controller.*The creator or other person will be the document controller.

- *The document controller* - is the person who controls operation process with the documents. He can appoint *the documents users* , "Change" the terms of execution, remove documents from the control, return the document for improvement, "Create" subordinate documents, and attach files and so on.

- *The document user* - is the person who takes part in the document operation or coordination. Only the controller can add *the document users.* The user can "Create" new documents on the basis of the original document. He decides to approve or dispose of document during document coordination.
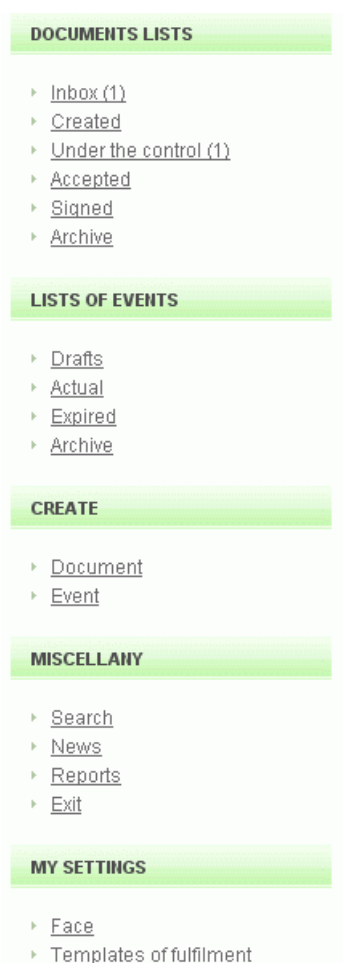
1. Login

For login "DocumentLite", you have to enter your login, password and click "Enter":

```
Login:
[                    ]

Password:
[                    ]

[       Enter        ]
```

2. Menu "Documents Lists"

If login and password are correct it will be the following window:

DOCUMENTS LISTS

- Inbox (1)
- Created
- Under the control (1)
- Accepted
- Signed
- Archive

LISTS OF EVENTS

- Drafts
- Actual
- Expired
- Archive

CREATE

- Document
- Event

MISCELLANY

- Search
- News
- Reports
- Exit

MY SETTINGS

- Face
- Templates of fulfilment

There are references to the folders "Inbox", "Created", "Under the control", "Accepted", "Signed", "Archive" in the menu "Documents Lists". There are quantities of unread documents in brackets near the folders "Inbox" and "Under the control" .
Have a look at the structure and functions of these folders.

2.1. Folder "Inbox"

To enter this folder it is necessary to click its name in the menu "Documents Lists".

The folder is for keeping users' "Inbox" documents. According these documents the user has to make decision to accept them or to refuse to work with these documents.

The content of the folder is displayed tabular with list of all users' "Inbox". There is a name of document in the first column. Ascending and descending sort is possible in each column. It is made by clicking up or down in the name of column. The document can be opened and sawn by clicking the name of document. New documents and unopened documents are bold.

2.2. Folder "Created"

There are "Created" documents in this folder (except the documents which were sent to "Archive"). If you click the name of folder it will appear its content on the screen.

The content of the folder is displayed tabular with the sorting columns. The document opening is carried like the folder "Inbox". New documents or unopened documents are bold.

2.3. Folder "Under the control"

By clicking the name of folder in the menu "Documents Lists" you can enter the folder.

The folder is for keeping documents where the system user is the controller.
The content of the folder is displayed tabular form with the sorting columns. New documents or unopened documents are bold.
The document can be opened and sawn by clicking its name.

2.4. Folder "Accepted"

By clicking the name of folder in the menu "Documents Lists" you can enter the folder.

There are documents which user works with in this folder.

Operation with them was completed or "Signed" documents if document was passed for coordination. The content of folder is displayed tabular with sorting columns. The document opening is carried by analogy the folder "Under the control".

2.5. Folder "Signed"

By clicking the name of folder in the menu "Documents Lists" you can enter the folder.

There are users' documents in this folder. Operation with them was completed or "Signed" documents if document was passed for coordination. The content of folder is displayed tabular with sorting columns. The document opening is carried by analogy the folder "Under the control".

2.6. Folder "Archive"

By clicking the name of folder in the menu "Documents Lists" you can enter the folder.

The documents from the folder "Under the control" are passed here and the document controller decided that operation with them was completed.
The content of folder is displayed tabular with sorting columns. The document opening is carried by analogy the folder "Under the control". The user can return document from the "Archive" if it is necessary. You need to open document and select "Change" the status of the document", then "Back from the archive" and click "Change".

3. Menu "Lists of events"

3.1. Drafts

In this folder you can see events which are created by user but they are not been actual events yet.

You can see the rules of events creation in the section 9. "Operation order in the part "Events".

3.2. Actual

You can see here events which are actual events for user at this moment.

In the column "Days before" is displayed how many "Days before" event. You can see the rules of events creation in the section 9."Operation order in the part "Events".

3.3. Expired

In this folder you can see events with delayed date of operation.

In the column "Days before" with minus sign you can see how many days are left before event. You can see the rules of events creation in the section 9. �Operation order in the part"Events".

3.4. Archive

In this folder you can se events which were sent to the "Archive" by the controller.

The events from folders "Drafts", "Actual", "Expired"are moved in this folder, the controller decided that operation with these documents was completed.

The content of the folder is displayed tabular with sorting columns. If you have a necessary you can return event from the "Archive". You have to open it, select "Back from the archive" in the category "Change status of event" and click "Change".

4. Menu "Create"

4.1. Document

The folder "Document" is used for creation of new documents: office memo, orders, instruction and so on. You can see the rules of document creation in the section 7.1. "Document creation".

4.2. Event

The folder "Event"is used for creation of new events: meeting, reminder and so on. You can see the rules of event creation in the section 9. "Operation order in the part "Events".

5. Menu "Miscellany"

5.1. Search

Search is carried out by clicking reference "Search" and in content of the folder of the system user. After clicking you can see the following window:

The search can be carried out in any column.

It is obligatory to point the folder (section) where the search will be carried out. You can point several folders.

The name of document can be pointed incompletely. For example, to search document "E-mail setting" you can enter "Setting". After that there will be the list of all documents with this word.

It is important the word is typed with capital letter or small letter. If the word "selling"is typed in the field "Name"the document "Selling"will not be found.

5.2. News

In the given section the actions are displayed which were made with documents in any folder of "DocumentLite" system.

In the column "Date" you can see date when the action was made. For example, when the document was signed or when the system user was added in "Discussions". To enter the document you need click its name in the column "Additional data".

The news can be sent to e-mail if the administrator of "DocumentLite" makes some user settings.

For example, the controller Kuznetsov S.P. has appointed the user of document Smirnov S.V. Smirnov S.V. receives by e-mail the letter with subject "You were appointed the user of document". The letter will be so:

Hello, Smirnov Andrei Ivanovich,
you were appointed the user of document.
Document: equipment
Comment: for coordination

By clicking the name of document in the letter you can enter the document in the system "DocumentLite".

5.3. Reports

In the given section you can see list of reports which can be viewed by this user.

For looking through necessary report you have to mark its point and click "Select". There is report "Overdue documents"in the system "DocumentLite" at the moment. For the order of other reports you have to click necessary reference on page "Reports", after that your order will be sent to systems project team.

After you have selected the report about delayed documents you can see the following window:

The list is presented in the form of two tables. One of them has documents from the folder "Under the control"; another has documents from the folder "Accepted".
In the column "Days of delay" you can see delayed days (if number is positive) or "Days before" date of execution (if number is negative).

5.4 Exit
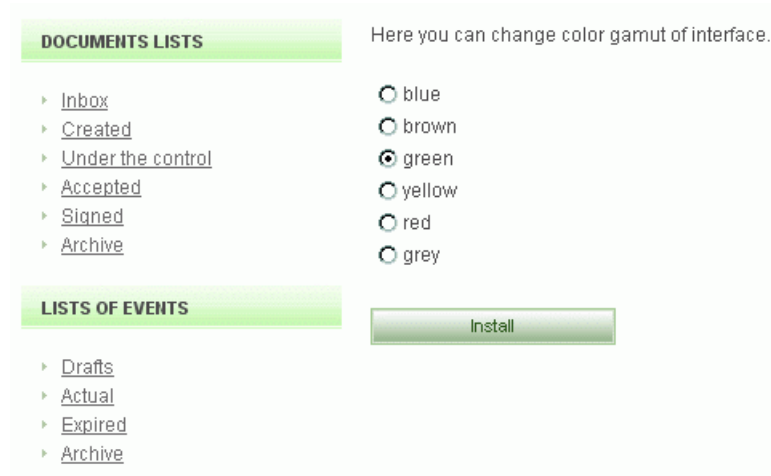
You can log out the system "DocumentLite" by clicking this menu.

6. Menu "My settings"

6.1. Face

The user can change the color of face of the system "DocumentLite" on PC.

It is enough to put a point near the necessary color and click "Install".

6.2. Templates of fulfilment

Every controller can save a chain of document execution by users and add it in the execution templates.

In this section you can see all execution templates of documents and change or delete any template by clicking references in the table. You can see the rules of templates creation in the section 10. "Tree of document implementation. Execution templates".

7.Work with documents in the system "DocumentLite"

7.1. Document creation

For document creation it is necessary to click "Document" in the menu "Create":

It is necessary to fill fields in the form:

- "Document type"

Select type of document: office memo, order, instruction and so on;

- "Name"

The name of document has to display the sense of document in two-three words. You should not type the name "Office memo", "Order"and so on, because it is displayed in the field "Document type". We recommend to give the intelligent name that allows mark out given document among incoming documents. For example, the name "About equipment purchase" is more informative than "Office memo in the purchase department".

- "Controller"

In this field you select department and employee that will control the process of document execution. The choice of controller is carried out by the purpose of document.

When all fields are filled it is necessary click "Further".

The given form will appear for filling other fields of document:

The fields can be different for different types of documents. It can be comments for the controller of document and for user of document, date of execution and so on.

The text of document can be typed in the field of document description or can be added in the file form. There is field "File for this purpose". To add a file it is necessary click "Browse" and select document for addition. If you have some files you have to click "Add another file". One more field will appear for document addition.

When all fields are filled you have to click "Add". Then document will appear in the folder "Created" in the creator and in the folder "Under the control" in the controller. If the creator and the controller is the same person the user will get document in the both folder. If the creator of document appoints the controller another person the controller will receive reminder by e-mail about new document in the folder "Under the control".

7.2. Work with documents in the folder "Under the control"

In order to appoint the user of document you have to open document in the folder "Under the control". The following window will appear:

In the opened documents you can add new files or delete added files.

The person to whom document will send for approval is appointed in the section "Users".

In order to appoint the user you have to click "Add document user". Then you have to choose group, user, if necessary to type a comment and click "Add":

If all users of documents are added you have to send document in operation process. You have to click "To begin document fulfilment":

The document will be send to users. They will receive reminder by e-mail about that they are appointed users of document.
The document can be sent by direct mail (it is made by administrator of the system "DocumentLite").

For this purpose it is necessary in the column "Distribution" to choose necessary distribution, to type comment and click "Add".
The controller can look over the needed documents and control the stage of operation in the folder "Under the control". You can see status of document in the list of user.

In this table you can see the names of users, date when the user opened the document first time and status (inbox, accepted document, signed document, refusal document). Near the names you can see link "Show". After clicking it you can see changes of status and comments to them.
The controller can see the history of status changes and comments of any document user. The user can see only his status history.
The controller can add a document to the user in the "Inbox" once again. He has to point the field "Return in the inbox" and click "Add".

The controller can send fulfilled or non-topical document to "Archive" (he can add comment). The document will disappear from the folder "Created" of the document creator and from the folder "Accepted" of the document user when the controller sends document to "Archive"

7.3. Work with documents in the folder "Inbox"

The document is sent for fulfillment and it appears in the user's folder "Inbox". Besides, the user receives reminder by e-mail.
Then the user opens the document.

In the window the user can see short document content, open attached files by clicking the file name. The user can click "Show" near his name and see comments for him from the controller in the section "Users".

After looking necessary information the user decides to accept document (choose status "Adopt document" and if it is necessary to type the comment for the controller) or refuse document (choose status "Abandon document" and if it is necessary to type comment about reason of refuse) and click "Change".

After the document was "Accepted" by user it is sent to "Accepted".

7.4. Work with documents in the folder "Accepted"

The document is opened and the user can see the following window:

The user can inform about document performance (choose "Sign" and if it is necessary to type comment for the controller, then click "Change") or refuse document (choose "Abandon document"and type comment about reason, then click "Change") depending of the result of work with document.

If the document is "Signed" it moves from the folder "Accepted" to the folder "Signed".

7.5. Work with documents in the folder "Signed"

After opening the document there will be the following window:

You can see the document in this folder if you enter it.

7.6. Work with documents in the folder "Archive"

The fulfilled documents are sent to "Archive" by the controller.
The document can be returned for operation, it is necessary to click "Back from the "Archive".

The document will appear in the creator's folder "Created", in the controller's folder "Under the control", in the users' folder "Inbox" or "Accepted". The operation with document is carried as usual.

8. Operation order in the part "Discussions"

The part "Discussions" is created for dialogue between system users, which work with given document. The dialogue is conducted between any participants of the given document: between the controller and the users, between the users, between the creator and the users.
You can organize the dialogue in the document in any folders ("Inbox", "Under the control", "Created" and so on).
After clicking "Discussion" you can see the following window:

If you want to organize dialogue with any participant of document or participants group you have to write subject in the field "Subject", then point the system users for discussion and click "Add".

You can create several subjects. We recommend to use short and understandable subjects -"Change of plan" or "Question to the paragraph 2 of the contract", it is for better knowing of discussion.
The subject is created and all participants of discussion will receive the letter with subject "You were added to the discussion"by e-mail, the letter is contained the subject of discussion and reference for discussion.
You can enter the discussion by clicking the subject in the table "Subjects".

In the field "Add message"you type the question for the discussion between the systems users included in the discussion or you type suggestions on the matter that is question for discussion. After typing you have to click "Add".

On this page the participants of discussion can be added or removed from the discussion.

After clicking "Add" all members of the discussion receive the letter with subject "New message in the discussion". There is subject of discussion and reference to enter the discussion in the letter.

The participant who received this letter enters the reference and types comments in the field "Add message". After clicking "Add" all users receive the reminder about new message in the given subject, and then they enter the reference and read comments.

The created subject can not be removed; it can be only removed from the user's discussion and only creator can see this subject.

9. Operation order in the part "Events"

The types of events can be different. For example, these are meetings, conferences and so on. In order to create the event you have to choose "Event" in the menu "Create".

The following window will appear:

You have to choose the type of event, type the name of event in the field "Name", choose controller, then choose date of event and type comment if you need it. Then click "Add".
Note: you can choose only date of event. The time of event you can point in the field "Comment".

For example, you have to create event "Meeting" about working results of department for a month, this event will be on December 27. Then you have to send this information to employee of department.

After clicking "Add" the following window will appear:

DOCUMENTS LISTS

- Inbox
- Created
- Under the control
- Accepted
- Signed
- Archive

LISTS OF EVENTS

- Drafts
- Actual
- Expired
- Archive

CREATE

- Document
- Event

MISCELLANY

- Search
- News

Name: About working results of department for a month
Date of creation: 2009-12-15
Date of event: 2009-12-27
Type: Meeting
Creator: Kuznetsov Sergey Petrovich
Controller: Kuznetsov Sergey Petrovich
Comment: For information
Change

USERS

Delete event from drafts

Add user of event

Users:

CHANGE STATUS OF EVENT

Operation:
Send to archive

Change

The created event will put in the folder "Drafts".
You have to send the information about event to employee of department. You have to click the reference "Add user of event", choose the necessary user in the following window and click "Add":

USERS

Delete event from drafts

Add user of event

User:
Supply department   Smirnov Adrey Ivanovich
Add

Distribution:
Subscription 1
Add

You need bring up to date the event for sending it to the users. You have to click "Delete event from drafts". The event will put in the folder "Actual" of the creator, the controller and the users.

DOCUMENTS LISTS

- Inbox
- Created
- Under the control
- Accepted
- Signed
- Archive

LISTS OF EVENTS

- Drafts
- **Actual**
- Expired
- Archive

▾Name▴	▾Type▴	▾Date of creation▴	▾Date of event▴	▾Creator▴	▾Controller▴	▾Days before
Report	Reminder	2009-12-15	2009-12-17	Smirnov Adrey Ivanovich	Smirnov Adrey Ivanovich	2
About working results of department for a month	Meeting	2009-12-15	2009-12-27	Kuznetsov Sergey Petrovich	Kuznetsov Sergey Petrovich	12

1

The events can be sorted by "Days before" event (the field "Days before").

The creator of event and his users can exchange comments about the given event. For that you have to type comment in the field "Add message" in the part "Discussion" and click "Add". For example:

DISCUSSION

Date	User	Message
2009-12-15 10:32:53	Kuznetsov Sergey Petrovich	5 minutes
2009-12-15 10:32:02	Smirnov Adrey Ivanovich	Time of report?
2009-12-15 10:30:40	Kuznetsov Sergey Petrovich	Everybody has to make report about work executed.

Add message:

Add

All actions from the event are displayed in the folder "News" (appointment of user, addition of messages) and send by e-mail.
The controller of event can send it to "Archive".

CHANGE STATUS OF EVENT

Operation:
Send to archive

Change

After that the event will put in the folder "Archive" in menu "Lists of events".

DOCUMENTS LISTS

▸ Inbox
▸ Created
▸ Under the control
▸ Accepted
▸ Signed
▸ Archive

LISTS OF EVENTS

▸ Drafts
▸ Actual
▸ Expired
▸ **Archive**

▾Name▴	▾Type▴	Date of creation▴	▾Date of event▴	▾Creator▴	▾Controller▴
About working results of department for a month	Meeting	2009-12-15	2009-12-27	Kuznetsov Sergey Petrovich	Kuznetsov Sergey Petrovich

1

It is possible to return the event from "Archive", you have to open it and choose "Back from the archive".

CHANGE STATUS OF EVENT

Operation:
Back from the archive

Change

If the event date has already passed it moves automatically to a folder "Expired".

The event from this folder can be moved by the controller to the folder "Archive".

10. Tree of document implementation. Execution templates.

Every user who was added in the document has to belong to specified stage of its performance. On default the user is added to stage "none" :

When the controller has sent the document for performance all users received document at the same time. But it is possible to make so that the document passed from the one user to another by defined way with defined conditions. That is you can set stages for document performance beforehand. You have to click "Show" near the user. The following window will appear:

Then you have to click "Change stage", type the name of new stage and click "Change".

The following window will appear:

If you click the name of stage you can change its name and define order of stages and conditions, which define the order of stages (step to the next stage will occur if all users signed document or refused document).

When you click "Install" the section "Users" will be the following:

USERS

Add to template of fulfilment

To begin document fulfilment

Add document user

✔ **1**		
User	Read	Status
Frolov Nikolay Ivanovich Show		Inbox

⬇

2		
User	Read	Status
Kuznetsov Sergey Petrovich Show		Inbox

Sequence of stages is indicated by arrows. Step with fulfillment of step condition is indicated by yellow arrows. The arrows are blue in the other cases.

After the order of stages is specified the controller clicks "To begin document fulfilment". The names of active stages will be black; the other stages will be grey.

USERS

Add to template of fulfilment

✔ 1		
User	Read	Status
Frolov Nikolay Ivanovich Show		Inbox

⬇

2		
User	Read	Status
Kuznetsov Sergey Petrovich Show		Inbox

After the document passed in work you can not edit chain of performance.

It often happens that document of the same type passes the same chain of users. The system has opportunity to save the sequence of stages which is created by user in the process of document performance. There is reference "Add to template of fulfilment".

USERS

Add to template of fulfilment

✔ 1		
User	Read	Status
Frolov Nikolay Ivanovich Show		Inbox

You have to click it and type the name of template, then click "Add".

USERS

Add to template of fulfilment

Название: [   ]

Add

The template created by the user is accessible only for user; other users can not see it. That is the template is created only for private use.

After the template is created you can use it in the process of document creation. For this purpose you have to click "Add document user" in the created document. In the following window you have to choose the execution template and click "Add":

The chain of fulfillment will be added in the document.

You can see the templates created by users in the section "Templates of fulfilment" from menu "My settings". Here you can change or delete the templates created by users.

11. Example how to work with the documents in the system "DocumentLite"

Let's consider the example.

The staff department has to place the order to the supply department for buying air-conditioners. The head of department Zaharova E.V. writes office memo to the head of supply department Frolov N.I. Frolov N.I. sends this document to his worker Skvortsov S.V. for fulfillment. This situation will be shown in the system "DocumentLite".

The forming process and fulfillment of request has the following stages.

1. The head of department Zaharova E.V. sends office memo to the head of supply department Frolov N.I. She enters the document management system "DocumentLite" and clicks "Document" in the menu "Create".

She chooses "Office memo" in the field "Document type".

She writes "Request for air-conditioners" in the field "Name".

In the field "Controller" she chooses "Staff department" "Zaharova E.V." that is she became the controller for control of request fulfilment.

She clicks "Further"and gets the following form for filling in data.

The list of fields can be different; it depends on fields that the admin of the system "DocumentLite" has entered in your company. In this example the following fields are filled:

Date of execution. The document has to be executed by user before this date.

Comment:. There is short description of document in this field.

File. The request for buying air-conditioners was put in shape of file on a form with quantity of air-conditioners, the brand and so on. Zaharova E.V. adds this file to the created document by clicking "Browse" and choosing the needed file. All fields are filled and she clicks "Add".

The document was created in the system "DocumentLite".

Zaharova has this document in the folder "Created" and "Under the control". She has to send this document to head of supply department Frolov N.I. She opens the folde r"Under the control", finds "Request for air-conditioners" in the list of document by clicking its name in the table. In the document she finds reference "Add document user" and choose user "Supply department" 'Frolov N.I.". Then she clicks "Add".

After that she clicks "To begin document fulfilment" and sends document in use.

The document will appear in the folder "Inbox" of Frolov N.I.

2. Frolov N.I. receives e-mail reminder that he became the user of document. He opens the document by clicking reference and sees its content.

He opens attached file by clicking its name in the section "Files".

Frolov N.I. has read this document and decided to send the office memo to his worker Skvortsov S.V. for fulfilment. Skvortsov S.V. also uses the system "DocumentLite"
Frolov N.I. selects "Change the status of the document" in the status of document and clicks "Change". After that the document will move in the folder "Adopt document" and Zaharova E.V. will receive e-mail reminder that Frolov N.I. has "Accepted" the document.

To send the document to Skvortsov S.V. Frolov N.I. opens the document in the folder "Accepted" and clicks reference"Create subordinate document".

DOCUMENTS LISTS

- Inbox (1)
- Created
- Under the control
- Accepted
- Signed
- Archive

LISTS OF EVENTS

- Drafts
- Actual
- Expired
- Archive

CREATE

- Document

Name: request for air-conditioners
Date: 2009-12-15
Type: Office memo
Creator: Zaharova Elena Vladimirovna
Controller: Zaharova Elena Vladimirovna
Comment: in the attached file
Date of execution: 2009-12-17
Create subordinate document   Discussions

FILES

Name	Size	Date	User	Comment	Operation
request.doc	29KB	2009-12-15	Zaharova Elena Vladimirovna	compliance with terms is obligatory	

Add another file

In the following window he chooses the type of document "Office memo" and makes himself the controller.

DOCUMENTS LISTS

- Inbox (1)
- Created
- Under the control
- Accepted
- Signed
- Archive

LISTS OF EVENTS

- Drafts

ON THE BASIS OF DOCUMENT: REQUEST FOR AIR-CONDITIONERS

Document type:
Office memo

Name:
buying of air-conditioners

Controller:
Supply department   Frolov Nikolay Ivanovich

Further

He clicks "Further" and gets a new form with additional fields of document.

DOCUMENTS LISTS

- Inbox (1)
- Created
- Under the control
- Accepted
- Signed
- Archive

LISTS OF EVENTS

- Drafts
- Actual
- Expired
- Archive

CREATE

- Document
- Event

MISCELLANY

- Search

Comment:
in the attached file

Date of execution:
2009-12-17

☑ Copy files of the parent document

File:
Обзор...

Comment:

Add another file

Add

He completes the necessary fields and ticks off "Copy files of the parent document". Then he clicks "Add".
He appoints the user of document Skvortsov S.V. in the created document.

SUBORDINATE DOCUMENTS

request for air-conditioners
buying of air-conditioners

CREATE

- Document
- Event

FILES

Name	Size	Date	User	Comment	Operation
request.doc	29KB	2009-12-15	Zaharova Elena Vladimirovna	compliance with terms is obligatory	Delete

Add another file

MISCELLANY

- Search
- News
- Reports
- Exit

USERS

Add to template of fulfilment

Add document user

MY SETTINGS

- Face
- Templates of fulfilment

User:

[Supply department ▼]   [Skvortsov Sergey Viktorovich ▼]

Comment:

[ ]

[Add]

Then he clicks "Add" and clicks reference "To begin document fulfilment" in the following window.

3. Skvortsov S.V. receives e-mail reminder that he is appointed the user of document. He opens it, reads and selects action "Adopt document" and clicks "Change".

USERS

none		
User	**Read**	**Status**
Skvortsov Sergey Viktorovich Show		Inbox

CHANGE THE STATUS OF THE DOCUMENT

Operation:

[Adopt document ▼]

Comment:

[ ]

[Change]

After that he works on buying air-conditioners.

When all work is done, air-conditioners are bought Skvortsov S.V. opens the document in the folder "Accepted" and selects status "Sign". Then he clicks "Change" and the document passes in the folder "Signed".

CHANGE THE STATUS OF THE DOCUMENT

Operation:

Sign

Comment:

Change

4. Frolov N.I. receives e-mail reminder that the user of document has changed status. He enters the system "DocumentLite" and opens the document in the folder "Accepted", then selects action "Sign" and clicks "Change".

CHANGE THE STATUS OF THE DOCUMENT

Operation:

Sign

Comment:

Change

Then he enters the folder "Under the control" and sends subordinate document to "Archive".

CHANGE THE STATUS OF THE DOCUMENT

Operation:

Send to archive

Comment:

Change

5. The head of staff department Zaharova E.V. receives e-mail reminder that the user of document has changed status. She opens the document and sends it to "Archive".