ELECTRONIC DOCUMENT MANAGEMENT SYSTEM

USER MANUAL

Prepared By:
IT Department
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**Introduction**

The Electronic Document Management System (EDMS) has been designed to support day-to-day use of incoming and outgoing correspondences and also internal tracking for department and project. It is used to capture information and standardize the monitoring of all correspondences in an electronic format. It can be easily retrieved by the authorized user. The system consists of 3 modules, incoming, outgoing and tracking.

1) Incoming module is used to register incoming correspondence such as letters, memos, emails, faxes etc. that are generated by third parties and received by project team.

2) Outgoing module is used to create letter, memo, fax etc. that are issued by project team and to be sent to the addressee (for external use only e.g. client, contractor etc.).

3) Tracking module is used to create letter, memo, fax etc. that are issued by project team and to be sent to the addressee (for internal use only e.g. within project team, region office & HQ).

This system can be accessed from this URL, [http://edms.uemedgenta.com](http://edms.uemedgenta.com).

![Login Screen](image)

(Screen 1.0 Login)

To login into the system, enter your **Staff ID** and **Password** and click on the `<Login>` button.
1.0 **Incoming Module**

Incoming module is used to register incoming correspondence such as letters, memos, emails, faxes etc. that are generated by third parties and received by project team.

1.1 **Incoming Status**

- There are 3 categories of status, Assigned Task (Pending and Completed) and Info Only.
- Tick on Status option and click on `<Submit>` button to view details of each status (as shown below).

(Screen 1.1 Incoming Status)

- By default, each new assigned task will be listed under Assigned Task – Pending status.
- To view details of each status, click on Tracking No. link and system will pop-up new window (as shown below).

(Screen 1.1.1 Status Listing)
To update details of action required, enter details and click on **Update** button.
- Click on **Close Window** button to close the window.
- When the pending task has been updated, the status will be changed to Completed.

(Screen 1.1.2 Update/View Status)
1.2 Add Document

To record details of new incoming document, click on Incoming → Add Document.

Enter details of document and click on <Save> button.

Tracking no. format: [Project Code]-[xxxxx]-[Year]. xxxx is the sequential number for the current year (e.g: INFRA-C3-00015-16).

Tracking No. will be generated by the system (as shown below).
1.3 Update/View Document

[Image of a screen showing the Update/View Document page of an Electronic Document Management System (EDMS) application.

The page displays fields for tracking number, document details, reference number, date of document, addressee, subject, author, company, DC remarks, attachment details, action required, actionee, response taken, and response data.

The screenshot includes a table with columns for file name, title, copy, action required, action taken, and response data.

(cont..)
• Click on PDF icon to view the scanned document.
• This PDF icon will appear if only the document already scanned. To upload multiple documents, please refer 1.7. To upload individual document, click on <Upload Document> button.
• You can replace the scanned document by clicking on <X> button and repeat as above.
• To update details of incoming document, enter details and click on <Update> button.
• To print out transmittal form, click on <Transmittal Form> button. This transmittal to be attached with the original document for distribution (optional).
• One or more attachments can be attached to each Tracking No.
• To upload the attachment (if any), click on <Add Attachment> button and system will pop-up screen (as shown below).

![Screen 1.3 Add Attachment]

• Click on <Choose File> button and select the document.
• When the document has been selected, click on <Save> button to upload documents.
• Click on <Cancel> button to return to the previous screen.
• The attachment listing will appear in incoming details (as shown below).

![Screen 1.3.2 Attachment Listing]
- **Actionee** is the person assigned by the PM/HOD to action a specific task or issue that related to the document.
- To add actionee (if any), click on `<Add Actionee>` button and system will pop-up screen (as shown below).

(Screen 1.3.3 Add Actionee)

- There are 2 types of category, for Action and for Info.
- For Action category, you must fill in Action Required.
- Select Actionee and click on `<Save>` button to add actionee. Each actionee will be sent an email notification.
- The actionee listing will appear in incoming details (as shown below).

(Screen 1.3.4 Actionee Listing)

- Below are the sample of emails received by actionee.
Reference No. : RNO/0006/MT-GEN  
Date of Document: 01-Sep-2016  
Subject: HANDLING OVER FOR NEW ADDITIONAL INVENTORIES - M & E  
Company: NORTHERN REGION  
Author: MOHAMAD PAZLI KASIM  
Type: FOR YOUR ACTION  
Action Required: PLEASE UPDATE INVENTORIES

The above have been entered into Electronic Document Management System (EDMS).  
Please click on the link below to access EDMS:  
Please click on the link below to see the attachment:  

Thank you.  
This is a system-generated message. Please do not reply.  

(Email 1: Action category)

Reference No. : RNO/0006/MT-GEN  
Date of Document: 01-Sep-2016  
Subject: HANDLING OVER FOR NEW ADDITIONAL INVENTORIES - M & E  
Company: NORTHERN REGION  
Author: MOHAMAD PAZLI KASIM  
Type: FOR YOUR INFO

The above have been entered into Electronic Document Management System (EDMS).  
Please click on the link below to see the attachment:  

Thank you.  
This is a system-generated message. Please do not reply.  

(Email 2: Info category)
### 1.4 Document Listing

#### (Screen 1.4 Document Listing)

- To view list of incoming document, click on Incoming → Document Listing.
- This screen will display list of document received by the project team.
- You will be able to view the scanned document by clicking the PDF icon on the second column and also attachment (if any) in the last column.
- To update or view details of each document, click on Tracking No. link (refer 1.3).
**Note:**
All records from Electronic Document Control System (EDCS) Propel have additional ‘P’ in Tracking No. to indicate the data has been migrated from the EDCS to the EDMS. No update is allowed.

(Screen 1.4.1 View EDCS Document)
1.5 Search Document

- To search for a document, click on Incoming → Search Document.
- This screen will allow you to do a multiple search.
- To search for a document, enter a parameter on the textbox or/and select item from the list and click on <Search> button.
- Search result will be displayed on bottom of the page (as shown below).
- Search keyword will be highlighted in the search result.

(Screen 1.5 Search Document)

- To print out the search result in Excel format, click on the Excel icon.

(Screen 1.5.1 Search Result)
1.6 Report

To produce a report, click on Incoming → Report.
This screen will allow you to generate a different type of report.
To generate a report, enter parameter or/and select item from the list for the selected report and click on <Preview> button.
Report will be displayed on bottom of the page (as shown below).

You will be able to print out the report in Excel format by clicking on the Excel icon.
1.7 Upload Document

To upload the document, click on Incoming → Upload Document.

- The document must be scanned in PDF format.
- Rename the PDF file according to Tracking No (e.g.: for Tracking No. INFRA-C3-00015-16, rename as 00015-16.pdf only).
- Click on `<Choose File>` button and select the document.
- When the document has been selected, click on `<Upload>` button to upload the document.
- Once you have uploaded the scanned document, the PDF file will be automatically linked to the system by Tracking No.
2.0  **Outgoing Module**

Outgoing module is used to create letter, memo, fax etc. that are issued by project team and to be sent to the addressee (for external use only e.g. client, contractor etc.).

2.1  **Booking No.**

- To generate new tracking number for outgoing document, click on Outgoing → Booking No.
- Enter outgoing details and click on `<Submit>` button.
- Tracking No. will be generated by the system (as shown below).
2.2 Update/View Document

- Click on PDF icon to view the scanned document.
- This PDF icon will appear if only the document already scanned. To upload multiple documents, please refer 2.6. To upload individual document, click on <Upload Document> button.
- You can replace the scanned document by clicking on <X> button and repeat as above.
- To update details of outgoing document, enter details and click on <Update> button.
- Addressee is the person who is addressed in the outgoing document.
- To add addressee (if any), click on <Add Addressee> button and system will pop-up screen (as shown below).
Enter details of addressee and click on <Save> button to add more addressee.
The addressee listing will appear in outgoing details (as shown below).
2.3 Document Listing

![Document Listing Screen](image)

(Screen 2.3 Document Listing)

- To view list of outgoing document, click on Outgoing → Document Listing.
- This screen will display list of document sent to client, contractor etc.
- You will be able to view the scanned document by clicking the PDF icon on the second column and also attachment (if any) in the last column.
- To update or view details of each document, click on Tracking No. link (refer 2.2).
2.4 Search Document

- To search for a document, click on Outgoing → Search Document.
- This screen will allow you to do a multiple search.
- To search for a document, enter a parameter on the textbox or/and select item from the list and click on <Search> button.
- Search result will be displayed on bottom of the page (as shown below).
- Search keyword will be highlighted in the search result.

- To print out the search result in Excel format, click on the Excel icon.
2.5 Report

- To produce a report, click on Outgoing → Report.
- This screen will allow you to generate a different type of report.
- To generate a report, enter parameter or/and select item from the list for the selected report and click on <Preview> button.
- Report will be displayed on bottom of the page (as shown below).

(Screen 2.5 Report)

- You will be able to print out the report in Excel format by clicking on the Excel icon.

(Screen 2.5.1 Report)
2.6 Upload Document

To upload the document, click on Outgoing → Upload Document.
The document must be scanned in PDF format.
Rename the PDF file according to Tracking No (e.g: for Tracking No. INFRA-C3-00125-16, rename as 00125-16.pdf only).
Click on <Browse> button and select the document.
When the document has been selected, click on <Upload> button to upload the document.
Once you have uploaded the scanned document, the PDF file will be automatically linked to the system by Tracking No.
3.0 **Tracking Module**

Tracking module is used to create letter, memo, fax etc. that are issued by project team and to be sent to the addressee (for internal use only e.g. within project team, region office & HQ).

3.1 **Booking No.**

- To generate new tracking number for outgoing document, click on Tracking ➔ Booking No.
- Enter outgoing details and click on `<Submit>` button.
- Tracking No. will be generated by the system (as shown below).
3.2 Update/View Document

- Click on PDF icon to view the scanned document.
- This PDF icon will appear if only the document already scanned. To upload multiple documents, please refer 3.6. To upload individual document, click on `<Upload Document>` button.
- You can replace the scanned document by clicking on `<X>` button and repeat as above.
- To update details of tracking document, enter details and click on `<Update>` button.
- Addressee is the person who is addressed in the tracking document.
- To add addressee (if any), click on `<Add Addressee>` button and system will pop-up screen (as shown below).
Enter details of addressee and click on <Save> button to add more addressee.
The addressee listing will appear in tracking details (as shown below).

(Screen 3.2.1 Add Addressee)

(Screen 3.2.2 Addressee Listing)
3.3 Document Listing

(Screen 3.3 Document Listing)

- To view list of tracking document, click on Tracking → Document Listing.
- This screen will display list of document sent within project team, region office & HQ.
- You will be able to view the scanned document by clicking the PDF icon on the second column and also attachment (if any) in the last column.
- To update or view details of each document, click on Tracking No. link (refer 3.2).
3.4 Search Document

To search for a document, click on Tracking → Search Document.

This screen will allow you to do a multiple search.

To search for a document, enter a parameter on the textbox or/and select item from the list and click on <Search> button.

Search result will be displayed on bottom of the page (as shown below).

Search keyword will be highlighted in the search result.

To print out the search result in Excel format, click on the Excel icon.
3.5 Report

- To produce a report, click on Tracking → Report.
- This screen will allow you to generate a different type of report.
- To generate a report, enter parameter or/and select item from the list for the selected report and click on `<Preview>` button.
- Report will be displayed on bottom of the page (as shown below).

(Screen 3.5 Report)

- You will be able to print out the report in Excel format by clicking on the Excel icon.

(Screen 3.5.1 Report)
3.6 Upload Document

To upload the document, click on Tracking → Upload Document.
The document must be scanned in PDF format.
Rename the PDF file according to Tracking No (e.g: for Tracking No. INFRA-C3-00125-16, rename as 00125-16.pdf only).
Click on <Browse> button and select the document.
When the document has been selected, click on <Upload> button to upload the document.
Once you have uploaded the scanned document, the PDF file will be automatically linked to the system by Tracking No.
4.0 **Administrator Module**

Administrator module is used to perform administrative functions. Company, Originator and Package sub-module is used to manage input in Incoming, Outgoing and Tracking module.

**Logout**

To exit from the system, just click on the *Logout* at the right top of the screen.