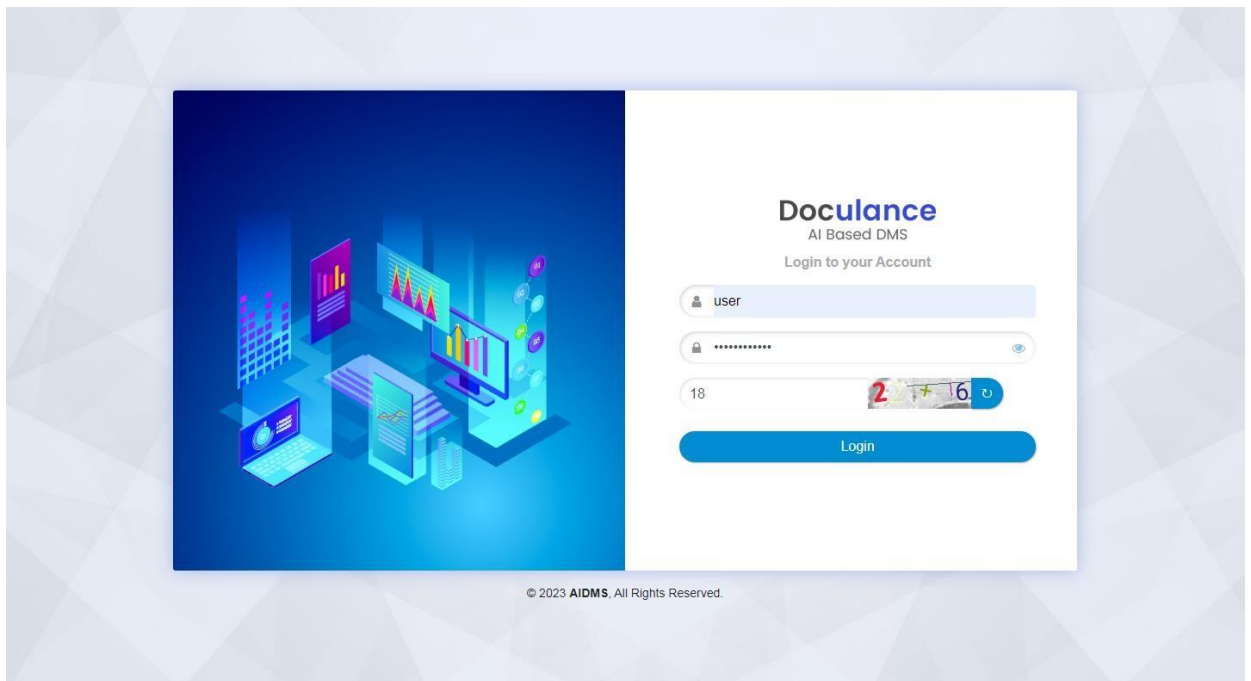


USER GUIDE/ USER MANUAL FOR DOCULANCE

1. First, enter your credentials (user ID/ Email_ ID and password) to get into your account.



2. After immediate sign in, the user comes to landing page which is Home screen with registered organization name. Here user can search any files with the appropriate content and also directly do the Add file by click on Add file icon, add category by click on icon or by add wings click on icon.
You may also change the password, and the theme color adjustment facility is available.



DEMO

Search By Keywords



Add File



Add Category



Add Wings

- » Upload documents and retrieve
- » Configure your own search result format
- » Manage users, roles & wings.

Hi, This is LIL.
Ask me anything !!

Activate Windows
Go to Settings to activate Windows



Switch Theme

3. The dashboard displays all category wise and tag wise total file count , allowing searches by keywords and category-wise from the uploaded files

The screenshot shows the Doculance dashboard interface. At the top left, the logo 'Doculance' is displayed with the tagline 'AI Powered OCR Enabled DMS'. In the top center, there is a grid icon. To the right, a 'DEMO' badge is visible. Further right, a user profile section shows 'Welcome sales user' and 'Sales Associate' with a circular icon containing the letter 'S'. Below the header, there is a search bar with a dropdown menu set to 'All' and the text 'Search By Keywords'. Underneath the search bar, the 'CATEGORY' section displays two boxes: 'All Files' with a count of 92 and 'Root' with a count of 92. Below this, the 'TAG' section displays two boxes: 'Documents' with a count of 1 and 'Test' with a count of 1. At the bottom right, there is a chatbot icon with the text 'Hi, This is LIL. Ask me anything!!'. A Windows watermark for 'Activate Windows' is also present. The footer contains the copyright notice '© 2024 Doculance'.

Doculance
AI Powered OCR Enabled DMS

DEMO

Welcome sales user
Sales Associate S

All Search By Keywords

CATEGORY

92 All Files	92 Root
-----------------	------------

TAG

1 Documents	1 Test
----------------	-----------

Hi, This is LIL.
Ask me anything!!

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4. Now add the name of the document category, by click on Save button. That category now showing under the listing table with the edit and configure search Index icon .

Doculance
AI Powered OCR Enabled DMS

Welcome sanmay

Note:
Here you can add the Document Category name.
If you want to add search index then you click configure search index and define fields. Also assign to the respective wings & roles

Add Document Category + Add Document

Document Category Name * Save

Note:
You can assign roles and wings to multiple categories simultaneously by selecting the checkboxes next to each category. After making your selections, click the "Add Wings & Roles" button to apply the changes.
To assign roles and wings to a single category, navigate to the category's row in the table and click the icon.
To configure the search result fields, navigate to the respective category row in the table and click the icon.

Show entries Search

#	Document Category Name	Wings	User Role Type	Action
<input type="checkbox"/> 1	new test			
<input checked="" type="checkbox"/> 2	zox	Hr	Executive	
<input checked="" type="checkbox"/> 3	retest	Hr	sr executive	
<input checked="" type="checkbox"/> 4	Documentation	Hr	sr executive, Executive	

Showing 1 to 4 of 4 entries

Activate Windows
Go to Settings to activate Windows.

Hi, This is LIL
Ask me anything!

5. Here the user edit the category by clicking on edit icon showing under action column . With directly assign to the wings to the respective roles.

Doculance
AI Powered OCR Enabled DMS

Welcome sanmay

Note:
Here you can update the Document Category name.
Assign to the respective wings & roles

Update Category ← Add Role Add Wing

Category : new test

Document Category Name *

Wings

User Role Type

Update

6. For a simple filter search, user can click on configure search Index icon by adding the desired Fields Label and Field Type for the category name (these fields will be available during document submission or while uploading documents). And also add the Global fields allow standardized fields enhance search and filtering capabilities, allowing you to quickly find documents based on specific criteria like project, department, or client."

Doculance
AI Powered OCR Enabled DMS

Welcome sanmay

Note:
If you want to add search result fields then define the fields by clicking "Add More Fields".

Configure Search Result Fields

Category : new test

Global Search Result Fields
Doculance's Global Data Fields are pre-defined attributes that can be applied to any document type. These standardized fields enhance search and filtering capabilities, allowing you to quickly find documents based on specific criteria like project, department, or client.

Select parent document Select Project Select Customer

Custom Search Result Fields
You can add the search result fields by clicking on the "Add more Fields" button.

Fields Label	Fields Type	Fields Value
<input type="text"/>	Select Type	<input type="text" value="e.g. value one # value two # value three"/>
<input type="text"/>	Dropdown	<input type="text"/>

Activate Windows
Go to Settings to activate Windows.

Hi, This is LIL. Ask me anything!

7. Upload single/bulk documents against the category first user assign the category to respective wings to the assigned roles. For easier searching, you may now add field names to each submitted file. Upload single/bulk documents. For easier searching, you may now add field names to each submitted file.

You can fill in the dynamic fields for each file uploaded for easy searching.



Add Single/Bulk Document

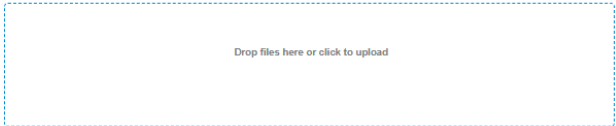


Document Category*

Root

Add Document Category

Upload Single/Bulk Document *



Drop files here or click to upload

Up to 10 files can be uploaded. For more than 10 files, please use the upload bulk.

If user wants to upload a single document then the maximum file size is 5MB. Files allowed with the extension .PNG, .JPG, .PDF, .PPTX, .DOCX, .jpeg

Switch Theme

Hi, This is LIL
Ask me anything !!

Activate Windows
Go to Settings to activate Windows.



8. After uploading the documents, you can view them in the document list. Here you can search category-wise, keyword-search, add tags and comments, and edit documents, respectively.

The screenshot displays the 'Doculance AI Based DMS' interface. At the top, the user is logged in as 'Sales User'. The main section is titled 'Documents List' and includes a '+ Add Document' button. Below this is a search bar labeled 'Search By Keywords'. There are two filter buttons: 'All' and 'Proposal & presentation', with the latter highlighted by a red box and labeled 'Category-wise search'. To the right, there is a 'Keyword Search' input field. The main content is a table with columns: 'Sl.No.', 'Uploaded Date', 'Document', 'Category', and 'Action'. The table lists 9 documents, all with the category 'Proposal & presentation'. The 'Action' column for each document contains three icons: a tag icon, an edit icon, and a comment icon. Red arrows point to these icons with labels: 'Add Tags' for the tag icon, 'Edit Document' for the edit icon, and 'Add Comments' for the comment icon. A 'Switch Theme' button is visible on the right side of the interface.

Sl.No.	Uploaded Date	Document	Category	Action
1	22-11-2023	attach_2211231851022_Product proposal-format.docx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
2	22-11-2023	attach_2211231851021_Multi-P-Demo-format.docx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
3	22-11-2023	attach_2211231851020_Demo R-format.docx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
4	22-11-2023	attach_2211231837190_DMS.pptx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
5	22-11-2023	attach_2211231835220_CCMS Jharkhand new.pptx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
6	22-11-2023	attach_2211231829381_Holding Tax.pptx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
7	22-11-2023	attach_2211231829380_Grievance_Management_System.pptx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
8	22-11-2023	attach_2211231826191_FAS_NOU Demo.pptx	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]
9	22-11-2023	attach_2211231826190_eFiles.pdf	Proposal & presentation	[Add Tags] [Edit Document] [Add Comments]

9. In the keyword search, you can click the document to view or download it. Able to search by page, tag, and keyword. Both Standard and Explorer views are supported.

The screenshot shows the Doculance AI Based DMS interface in Standard View. At the top, the user is logged in as 'Sales User'. A search bar contains the keyword 'tax'. Below the search bar, there are tabs for 'Standard View' and 'Explorer View', and a 'Tags' input field. A filter for 'Proposal & presentation' is selected. A table displays one search result:

Sl.No.	Uploaded Date	Document	Category	Action
1	22-11-2023	attach_2211231829381_Holding Tax.pptx	Proposal & presentation	[Download] [Edit] [Share]

Below the table, it says 'Showing 1 to 1 of 1 entries'. A red arrow points to the document name with the text 'Click Here'.

The explorer view is shown in the figure below.

The screenshot shows the Doculance AI Based DMS interface in Explorer View. The search bar still contains 'tax'. The 'Explorer View' tab is active. The document 'attach_2211231829381_Holding Tax.pptx' is highlighted. To the right, the 'Field Details' section is expanded, showing:

- Project name:** Holding Tax
- Status:** Submitted
- Date of Submission:** 2023-11-22

Below this, the 'Comments' section shows 'No comments'.

You can click the document to view or download it.

The screenshot displays the Doculance AI Based DMS interface. At the top left, the logo reads "Doculance AI Based DMS". At the top right, it says "Welcome Sales User" with a user profile icon labeled "Sales User". In the center of the top navigation bar is a circular icon with a grid pattern. Below the navigation bar, the main content area is titled "Document". To the right of this title is a "Download" button with a red arrow pointing to a download icon (a blue arrow pointing down into a square) which is highlighted with a red box. Further right is a "Switch Theme" button, which is a blue circle with the text "Switch Theme" written vertically. Below the "Document" title, the file name "File Number:- Attach_2211231822191_Doculance.Pptx" is displayed. The main content area shows a preview of a presentation slide. The slide has an orange background on the left with the text "Doculance AI based document Smart management System". On the right side of the slide, there is a white login form titled "Doculance AI Based DMS" with the subtitle "Login to your Account". The form includes fields for "User Name", "Password", and "Enter Capcha", along with a "Login" button. A small square icon with a diagonal line is visible in the top right corner of the slide preview area.

10. In the category-wise search, you can perform a field-wise filter search.

The screenshot shows the Doculance interface with the 'Documents List' section. A red box highlights the 'Proposal & presentation' category button. A red arrow points to the 'Category-wise Search' label above the search bar. The table below shows the results of this search.

Sl.No.	Uploaded Date	Document	Tag	Name Of customer	Name Of proposal	Proposal Type	Project name	Status	Date of Submission	Ren
1	22-11-2023	attach_2211231851022_Product proposal-format.docx	product proposal letter	N/A	Product proposal-format	N/A	MMR	Submitted	22-11-2023	N/A
2	22-11-2023	attach_2211231851021_Multi-P-Demo-format.docx	multi demo proposal letter	N/A	Multi-P-Demo-format	N/A	MMR, AI DMS	Submitted	22-11-2023	N/A
3	22-11-2023	attach_2211231851020_Demo R-format.docx	demo proposal letter	N/A	Demo R-format	N/A	MMR	Submitted	22-11-2023	N/A
4	22-11-2023	attach_2211231837190_DMS.pptx	ppt	N/A	N/A	N/A	DMS	Submitted	22-11-2023	N/A
5	22-11-2023	attach_2211231837190_DMS.pptx	ppt	N/A	N/A	N/A	CCMS Ibar Khan	Submitted	22-11-2023	N/A

The screenshot shows the Doculance interface with the 'Documents List' section. A red box highlights the 'Filter Search' dropdown menu, which is set to 'Proposal Type'. A red arrow points to the 'Filter Search' label. The table below shows the results of this search.

Sl.No.	Uploaded Date	Document	Tag	Name Of customer	Name Of proposal	Proposal Type	Project name	Status	Date of Submission	Ren
1	22-11-2023	attach_2211231851022_Product proposal-format.docx	product proposal letter	N/A	Product proposal-format	N/A	MMR	Submitted	22-11-2023	N/A
2	22-11-2023	attach_2211231851021_Multi-P-Demo-format.docx	multi demo proposal letter	N/A	Multi-P-Demo-format	N/A	MMR, AI DMS	Submitted	22-11-2023	N/A
3	22-11-2023	attach_2211231851020_Demo R-format.docx	demo proposal letter	N/A	Demo R-format	N/A	MMR	Submitted	22-11-2023	N/A
4	22-11-2023	attach_2211231837190_DMS.pptx	ppt	N/A	N/A	N/A	DMS	Submitted	22-11-2023	N/A
5	22-11-2023	attach_2211231837190_DMS.pptx	ppt	N/A	N/A	N/A	CCMS Ibar Khan	Submitted	22-11-2023	N/A

11. Users can receive notifications when they post comments on any document.

The screenshot shows the Doculance AI Based DMS interface. At the top left, the logo 'Doculance AI Based DMS' is displayed. On the top right, the user is logged in as 'Sales User'. A navigation bar contains 'Dashboard', 'Manage Document', and 'Manage Masters'. The 'Notifications' option is highlighted with a red box. Below the navigation bar, there are filter buttons for 'All', 'Proposal & presentation', and 'Client Name'. A 'Category Name' dropdown is set to 'Proposal & presentation', and a 'Keyword Search' field is present. The main content area features a table with the following data:

Sl.No.	Uploaded Date	Document	Tag	Name Of customer	Name Of proposal	Proposal Type	Project name	Status	Date of Submission	Ren
1	22-11-2023	attach_22112_31851022_Product proposal-format.docx	product proposal letter	N/A	Product proposal-format	N/A	MMR	Submitted	22-11-2023	N/A
2	22-11-2023	attach_22112_31851021_Multi-P-Demo-format.docx	multi demo proposal letter	N/A	Multi-P-Demo-format	N/A	MMR, AI DMS	Submitted	22-11-2023	N/A
3	22-11-2023	attach_22112_31851020_Demo R-format.docx	demo proposal letter	N/A	Demo R-format	N/A	MMR	Submitted	22-11-2023	N/A
4	22-11-2023	attach_22112_31837190_DMS.pptx	ppt	N/A	N/A	N/A	DMS	Submitted	22-11-2023	N/A
5	22-11-2023	attach_22112_31837190_DMS.pptx	ppt	N/A	N/A	N/A	CCMS, Itharkhan	Submitted	22-11-2023	N/A