IIUM DOCUMENTS MANAGEMENT SYSTEM (IDMS)



WHAT IS IDMS?

A centralised Electronic Document Management System for all campuses in IIUM



IIUM DOCUMENTS MANAGEMENT SYSTEM (IDMS)

OBJECTIVES

- a) To provide a single platform to manage and archive IIUM records.
- b) To avoid inconsistency in utilisation of the IIUM Filing Code due to the increasing number of KCDIO and related changes.
- c) To eliminate difficulties in gathering information for corporate use and various audit.
- d) To eliminate high cost of maintenance of too many separate documents management systems within the university.
- e) To optimise IT personnel resources, avoid difficulties in installing various software and tedious access control management.

BENEFITS OF USING IT?

- 1. Cost savings to the University (maintenance fees & licenses)
- 2. Reduce document searching time due to :
 - less dependency on hardcopy documents.
 - the same document can simultaneously be accessed by multiple users.
 - Easy access by unlimited authorized users
- 3. Reduce risks to the hardcopy documents / files as a result of less movement of documents /files :
 - Loss during transfer
 - Damaged due to frequent handling

IMPLEMENTATION PLAN

>> MSD (pilot user & performance test) 1st September 2018

>> Finance, AMAD, CPS, KOE, Library 1st January 2019

> >> KCDIO at IIUM Gombak, KL & Pagoh Campuses 1st April 2019

> > >> KCDIO at IIUM Kuantan & Gambang Campuses 1st June 2019

> > > All Kulliyyah/Centre/Division/Institute/ Office's (KCDIO) in IIUM will be made compulsory to utilise the system.

HOW TO ACCESS?

IDMS is accessible through the IIUM's staff portal <u>https://ibnubaitar.iium.edu.my/staff/appsystem.php</u>.

The IDMS Forms are available at the MSD Intranet http://www.iium.edu.my/division/msd/downloadable-forms-3

RESPONSIBILITIES

IDMS is under the responsibility of the **IIUM Records Management Committee (IRMC).**

Management Services Division (MSD)

being the Functional Team Members and Secretariat to the IRMC will manage changes to the following :

- a) The IDMS User's Manual
- b) The IDMS Forms
- c) The setup of the IIUM Filing Code in IDMS
- d) The setup of the KCDIO filing code number
- e) Conduct IDMS Training upon request

Information Technology Division (ITD)

The Technical Team Members comprised of the Gollab application, HR IT, Finance IT, IIUM Library IT and RMC IT teams.

This team will manage the following :

- a) Prepare IDMS User's Manual.
- b) Manage Users Registration.
- c) Manage Users Access within their assigned KCDI.
- d) Manage Users Access to the documents (for KCDI without Technical Team Members).

ITD also being the IDMS's Document Controller is responsible to:

- a) Secure Budget for Server.
- b) Get project approval from relevant IT approval authorities.
- c) Compilation of all relevant documents for safe keeping.
- d) Update MSD & ITD's webpage.

TYPE OF USERS IN IDMS

- 1. Consumer
- 2. Contributor
- 3. Collaborator
- 4. Manager

(Staff of IIUM who were given access)(KCDIO's Records Managers)(MSD's Records Managers)(ITD & RCM's Secretariat)



Folders and files:

	Consumer	Contributor	Collaborator	Manager
View folder/item details page	 √			
Like/unlike	\checkmark	✓		✓
Favorite/unfavorite				✓
Rename folder/item – created/added by self		 Image: A second s	✓	✓
Rename folder/item – created/added by other user				✓
Edit basic details – created by self		\checkmark	✓	✓
Edit basic details – created by other user				✓
Edit custom properties – created by self		\checkmark	×	✓
Edit custom properties – created by other user				✓
Сору	√ ⁽¹⁾	\checkmark	✓	✓
Move – content created by self				✓
Move – content created by other user				✓
Delete – content created by self				✓

		0		0
	Consumer	Contributor	Collaborator	(Marager)
Delete – content created by self		Ý	4	1
Delete – content created by other user				
Manage permissions – content created by self				1
Manage permissions – content created by other user				
Manage aspects – content created by self				1
Manage aspects – content created by other user			1	
Change type – content created by self				1
Change type – content created by other user			1	
Copy page URL				
Add comment		×	1	
Edit comment – content created by self				
Edit comment – content created by other user				
Delete comment – content created by self			4	
Delete comment – content created by other user				

There are two (2) types of changes that may affect staff's responsibilities and access to the documents kept in the IDMS :

Organisational changes:

- Once approved by the Board of Governors, KCDIO that falls under these category (ies) will be assigned a KCDIO code.

 a)New establishment of KCDIO
 b)Merging of KCDIO
 c)Separation of KCDIO
- 2. Upgrading or downgrading any KCDIO's status either to Kulliyyah level, or will not change its KCDIO code as long as its physical operation maintain isolated from other KCDIO or only placed under purview of certain KCDIO.
- 3. Once a KCDIO ceases to exist, the KCDIO code will be closed and cannot be used by other KCDIO.

□ Change of Users

KCDIO is to fill up the form and submit to MSD for proper access be given / revoked or changed whenever there are:

- a) new appointment of staff.
- b) Internal reshuffling causing change of responsibilities of a staff

 User / Administrator
 General / confidential / restricted documents
- c) End of appointment of a staff

AlFresco has many capabilities, however due to several limitations, the University is limiting its current scope to archival of documents only.

The system is an independent system. There will be no integration with any application.

To avoid confusion, any new establishment of KCDIO will start using number 700 and above in IDMS. Old establishment of KCDIO will retain their current number.

Since everybody can create folders and upload records, to avoid missuse, users who are assigned as consumers will not be allocated any storage to upload any documents.

OVERVIEW OF THE SYSTEM

The system comprises a few sections that users need to familiarise :

- a) Home Screen
- b) Site Dashboard
- c) Manage Members
- d) Document Library
- e) Manage Folders and Files
- f) Search Files and Folders



SITE DASHBOARD

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Home My Files Shared Files Sites • Tasks • People	e Repository OZAL	LIYATI BT. OMAR • 🔍 Search files, people, sites 🛞
الدامعة السامية العالمية ماليريا المامية العالمية ماليريا (المامية ماليريا المامية ماليريا MSD Private	Site Dashboard	Document Library Calendar Wiki More • 💂 Ӧ
Site Members	dd Users I've Recently Modified •	
1 - 61 of 61 All M	Members Keep track of content changes	
ANDI SHAFRIN SHAFRIN Contributor	 Easily see which document library items site members have been working on. In the decan also jump to the details page to leave a comment. 	etailed view you can like an item and mark it as a favorite. You
AZIRAA MOHD ZAWYAAI Manager	Site Activities Everyone's activities all items in the last 28 days	
Abdul Rahim Ahmad Manager	Today MOHD AIMAN OSMAN added document 🗅 8645-1.pdf	^
Adis Nabawi Azizan Collaborator	4 hours ago Faridab Bt, Mobd, downloaded document 8610-NOTICE OF APPOINTMENT FOR REN	
Administrator Manager	6 hours ago	
Asnili Marniwati Bt. Ahmad	Faridah Bt. Mohd. previewed document 🗅 8610-NOTICE OF APPOINTMENT FOR RENER 6 hours ago	WED CONTRACT OFFICER.pdf

SITE DASHBOARD : Choose any site that you are allowed access to. Within your selected Site Dashboard, you will find the Site Members, Site Content and Site Activities segment. You may add members, create group and classify members in the Site Members segment if you are authorized to.

Once registered, users may login into IDMS using the password provided. Users may change the password accordingly.



CUSTOMIZING USER DASHBOARD



You may customize your site dashboard view as per given layout options



Your site dashboard layout varies from single to four columns view

	Nome My Files Starte Files Starts + Tasks + Resplit Repository		Home My Files States Table + Regale Repository	
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Site Members Site Contern Site Activities	Canal	Site Members Site Conteret Site Acontees Sit	os Cend	Site Achies Inge Proton

Once you have chosen your Site Dashboard view, you may choose your elements to view.

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		Add Users
1 - 61 of 61		All Members
ANDI SHAFRIN SHAFRIN Contributor		^
AZIRAA MOHD ZAWYAAI Manager		
Abdul Rahim Ahmad		
Adis Nabawi Azizan Collaborator		

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MSD Private		Size Dashboard Document Library Calendar Wiki More + 🚇 🔘 +
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Aziina Bt. Abd. Talib Consumer	18 hours ago	~



Your customized Site Dashboard layout options

HOME VIEW

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+ https://idms.iium.edu.my/share/page/user/ozaliyati/dashboard	C Q Search	≡
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Home My Files Shared Files Sites Tasks People Reposi	tory OZALIYATI BT. OMAR • Q. Search files, people, sites (8)	
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All • Image: Create Site MSD Site Finder MANAGEMENT SERVIC Image: Create Site Image: Favorite Image: Create Site Image: Favorite	Everyone's activities all items Today MOHD AIMAN OSMAN added document 8645-1.pdf in MSD 4 hours ago 4 hours ago Faridah Bt. Mohd. downloaded document 8610-NOTICE OF APPOINTMENT FOR RENEWED CONTRACT OFFICER.pdf in MSD Faridah Bt. Mohd. previewed document 8610-NOTICE OF APPOINTMENT FOR RENEWED CONTRACT OFFICER.pdf in MSD	
Tasks Assigned to Me Unassigned (Pooled Tasks) Overdue Tasks Active Tasks • Start Workflow Active Tasks • Review the tasks assigned to you Different types of tasks can appear in this task list and you need to address each one. This could involve reviewing a document or	S hours ago V S hours ago V Ve Recently Modified	-

HOME : The Home button will take you to the main page of the system.

Location of the Site Dashboard may differ

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ACCESS CONTROL

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The Managers will control access to created sites.

ADD USERS

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1 - 61 of 61 All Members	Keep track of content changes	
ANDI SHAFRIN SHAFRIN Contributor	Easily see which document library items site members have been working on. In the detailed view y can like an item and mark it as a favorite. You can also jump to the details page to leave a comment	/ou t.
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Abdul Rahim Bin Ahmad Consumer	ANDI SHAFRIN SHAFRIN added document	
Adis Nabawi Azizan Collaborator	ASSISTANT ALLOWANCE.pdf just now 6 more V	

Only the Managers (ITD & MSD) can add/remove users or create groups within KCDIOs' IDMS folders KCDIO need to fill up forms available at MSD website to request for access / change of access



MANAGING USERS AND GROUPS

Once a user is added, there are two ways to manage member which are by Users or Groups.

MANAGE USER User may change the role of user or remove the user from the site

MANAGE GROUP The Manager may change the role or remove the groups from the site.



CREATE FOLDERS & VIEWING OPTIONS

Document library is the place where all the documents are saved and being managed.



Only the Managers (ITD & MSD) can add or create group within KCDIOs' IDMS folders. KCDIO need to fill up forms available at MSD website to request for access / change of access

MANAGE FOLDERS

Home My Files Shared Files	Sites	; 🔻	Tasks 🔹 People Repository Admin Too	ls			Adminis	trator 🔹
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2.		-	20 Meeting	Meeting	No Tags			
▼ Library		-	19 Conference or Seminar	Conference / Seminar	No Tags			
Documents			18 Activity or Programme	Activity/ Programme	No Tags			
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01 Personal Files			16 Publicity	Publicity	No Tags			
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02 Corporate Profile			14 Research & Publications	Research & Publications	No Tags			
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05 Human Resources			11 Collaboration	Collaboration	No Tags			
06 Quality		-	10 Finance	Finance	No Tags			
07 Security & Safety		-	09 Property & Facility	Property & Facility	No Tags			
08 Information & Comn		-	08 Information & Communication Technology	Information & Communication Technology	No Tags			
09 Property & Facility			07 Security & Safety	Security & Safety	No Tags			
10 Finance		-	06 Quality	Quality	No Tags			
11 Collaboration		-	05 Human Resources	Human Resources	No Tags			
12 Student Affairs		-	04 General Administration	General Administration	No Tags			
13 Academic Affairs		-	03 Strategic Planning	Strategic Planning	No Tags			
14 Research & Publicati			02 Corporate Profile	Corporate Profile	No Tags			

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		Users may select their preferred view of folders from the 7 opti	ions given			

EXAMPLE : Simple View Option

Home My Files Shared Files	Sites • Tasks • Pe	eople Repository	OZALIYATI BT	OMAR • 🔍 Search files, prode, sites 🛞
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I'm Editing Others are Editing Recently Modified		01-01-0017 (C) Amir Bin Omar Modified 6 days ago by MOHD AIMAN OSMAN		Hide Breadcrumb RSS Feed
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EXAMPLE : Detailed View Option

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re Editing Modified		-	01-01-0017 (C) Amir Bin Omar			OZALIYATI BT. OMAR	Mon 13 Aug 2018 08:54:47	MOHD AIMAN OSMAN	Fri 9 Nov 20	RSS Feed
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FT STAFF		-	01-01-0050 (C) Siti Hanim Bt. Mohd. Hosni			NURAZLINA BT. ABDUL RASHID	Tue 14 Aug 2018 12:15:09	MOHD FAIZAL BIN ISMAIL	Wed 29 Aug	2018 16:59:58
OTHERS STAFF		-	01-01-0059 (C) Izani Bin Haji Othman			NURAZLINA BT. ABDUL RASHID	Tue 14 Aug 2018 12:15:19	MOHD FAIZAL BIN ISMAIL	Wed 29 Aug	2018 17:00:55 🛓 🐚 🖗 … More
01-01-0017 (C) An		-	01-01-0061 (C) Ismail Bin Johan			NURAZLINA BT. ABDUL RASHID	Tue 14 Aug 2018 12:15:27	ANDI SHAFRIN SHAFRIN	Wed 3 Oct 2	018 11:01:45 View Details
01-01-0027 (C) Az		•	01-01-0079 (C) Zainuddin Bin Abdul Hanan			NURAZLINA BT. ABDUL RASHID	Tue 14 Aug 2018 12:15:35	MOHD FAIZAL BIN ISMAIL	Wed 7 Nov 2	2018 12:07:13

EXAMPLE : Table View Option

ADMIN FUNCTION

UPLOADING RECORDS

Home My Files Shared Files	i Site	es *	Tasks • People Repository				OZALIYATI E	ST. OMAR 🔹 🔍 Sear	ch files, people, sites	5 X			
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FT STAFF			ALLOWANCE CLAIM FOR MOVING TO NEW HOUSE.PDF		MOHD FAIZAL BIN ISMAIL	Wed 29 Aug 2018 16:50:43	MOHD FAIZAL BIN ISMAIL	Wed 29 Aug 2018 16:50:43					
CTHERS STAFF			ANNUAL REPORT ON SALARY INCREASE MONTH JULY 1987.PDF		MOHD FAIZAL BIN ISMAIL	Wed 29 Aug 2018 16:50:43	MOHD FAIZAL BIN ISMAIL	Wed 29 Aug 2018 16:50:43					
= STAFF		2	ANNUAL REPORT ON CALARY INCREASE			Weit 20 Aug 2010		Weit 20 Ave 2010					

Only KCDIOs' Records Liaison Officers and Assistant Records Liaison Officers can upload documents KCDIO must register designated persons to be given access to perform the task. The task may be centralized function or decentralized to a few Assistant Records Liaison Officers.

OR JUST DRAG & DROP RECORDS IN THE REQUIRED FOLDER



DOCUMENTS ACTION

Home My Files Shared Files Sites • Tasks • People Repository OZ	ALIYATI BT. OMAR 🔹 🔍 Search files,	, people, sites 🛞 ^	x			
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Once uploaded, we can set the records' accessibility options and tag it for easy search.

UPDATE VERSION

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Users can update the version of their documents without overriding the previous version of the documents created in words, powerpoint and etc.

No Description

UNUTILISED FUNCTION

STARTING A WORKFLOW

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	Items: IDMS Slide presentation.pptx Description: (None) Modified on: Fri 16 Nov 2018 13:40:47 Add Remove All Other Options Send Email Notifications	⊖ View More Actions		

AlFresco open source system has the capability to create workflows. But for IDMS purposes, the use is currently limited to archival of records only.

ADMIN FUNCTION

TAGGING A DOCUMENT

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MANAGE PERMISSION OF A DOCUMENT

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Locally	y Set Permissions						
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			No permissions set.				

For easy search of its content, it is highly recommended for a record to be OCR prior to uploading it into IDMS. The records can also be tagged.



Search for your document using either normal search or advanced search. Choose Folder instead of Content for a better search of a folder rather than any documents that contain the word being searched.

VIEW AFTER ADVANCED SEARCH FOLDERS

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VIEW AFTER NORMAL SEARCH CONTENTS

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SAVING ADVANCED SEARCH SETTINGS



setting for easy use in the future without having to repeat typing the setting.

MAKE SURE ALL SOFTCOPY DOCUMENTS **IN IDMS ARE KEPT IN** THE SAME FOLDER AS THE HARDCOPY FILE AS PER **IIUM FILING CODE &** REGULATIONS



Make sure you use the right filing code in your correspondences

