EDRMS Version 6.3
User Guide

Contents

ACCURACY

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INTENDED AUDIENCE

This manual is intended to be used as a general user guide for *Liberty EDRMS*. No prior knowledge of using *Liberty EDRMS* as a user or administrator is required however training must be provided by a Netcall Consultant or a trained trainer within the organisation.

USER GUIDE STRUCTURE

Section	Title	Description
1	**Introduction**	This introduces you to the features and benefits that EDRMS offers.
2	**Getting Started**	This shows you how to access EDRMS and describes the functions of EDRMS's user interface components.
3	**Working With Folders**	This explains how to use the basic features of EDRMS for folder management.
4	**Working With Documents**	This demonstrates how to use the basic features of EDRMS for document management.
5	**Version Control**	This introduces the concept of versioning and shows how you can track and save all of your document changes.
6	**Indexation**	This shows you how, by using Categories, you can add additional, user-defined metadata to defined file types.
7	**Searching EDRMS**	This shows you how to perform keyword and advanced EDRMS searches on both file attributes and file content.
8	**Sending Documents**	This demonstrates how you can share files stored within EDRMS to internal and external recipients.
9	**Subscription**	This explains the function of file subscription and how this facility help you track changes made to these files.
10	**File Association**	This explains how the use of file association helps you keep track of associated files.
11	**Review Date**	This describes review dates and shows how they can be used to set dates for document review.
12	**Archive Date**	This introduces archive dates and explains how they can be used to control the life-span of your documentation.

13	**Recent Documents**	This shows you the EDRMS facility that allows you to return to recently visited documents.
14	**Favourites**	This demonstrates the EDRMS facility that allows you to "bookmark" documents and folders for future reference.
15	**Workflow Approval**	This explains the application and use of Workflows for document approval.
16	**Inbox**	This describes your message inbox which can be used to keep track of the various EDRMS actions that require your attention.
17	**Viewer**	Explains the two types of viewers available and how to use them.
18	**Measurement Viewer**	Instructions on the user of Measurement Viewer.
19	**Forms**	Explains how to load and submit forms.

1 INTRODUCTION

1.1 OVERVIEW

Liberty EDRMS is a web-based system that provides the facility to store, access and organise electronic documents and related information in a single repository. This section gives you a glimpse of EDRMS and what it can do for you.

The topics covered in this section are:

- EDRMS at a Glance

- EDRMS Features

- EDRMS Efficiency

1.2 EDRMS AT A GLANCE

Liberty EDRMS is accessed using a Web browser interface e.g. Internet Explorer, Google Chrome or Firefox. No additional software or utilities are required to access EDRMS through a Web browser, simply point your browser to the location of the EDRMS server and its respective login page; for example,

http://<my_server>:<port>/SerengetiEDRMS

- Please note that some screens which EDRMS uses, require Java to be installed on the host to run. It is advised that this is kept up to date to ensure that the operational integrity is maintained.

- If your organisation is utilising the Single Sign-on function then the system will be accessible without the requirement to enter your username and password, through your network credentials.

- The EDRMS version number is displayed at the bottom of the Login form, and after logging in, at the right-hand end of the screen footer bar.

Once you have logged onto the system, you are presented with the Web browser interface. The interface is divided into two, main areas.

- The header of EDRMS is a navigation bar that allows quick and easy access to various areas and functionality of the system, such as searching, workspaces and recently viewed/favoured documents. This region also contains links allowing you to log out of the system and change your password.

- The main content frame occupying the majority of the browser. This will change according to the functionality within EDRMS that you are currently using, it can range from your messages inbox to views of document content and associated details.

1.3   EDRMS FEATURES

The following chart shows the features of Liberty EDRMS.

Feature	Description
Ease of access to files	Fast and precise navigation to files is provided by a clear and functional web interface.
Integrated Storage	Each directory can store multiple file types, including:- Web files Word processing files Audio files Video clips Zip files Executable files XML content.
Versioning	File are versioned, enabling you to keep older versions of files and therefore track changes made to documents in their lifetime. EDRMS manages the versions for you and all versions are stored in the same directory.
File access for collaborative projects	File Check-in/Check-out allows you to lock files you are working on to prevent other users overwriting your work.
Locations	By using the Paste as Link function, a single file may be accessed from a number of locations.
Searching	Multiple file types can be stored together and categorised in exactly the same manner within EDRMS. You can perform a single search to locate all references to a topic.
Archive Date	You can set the date when a file will expire and become automatically archived. Modifications can be made to this date at any time. There is also an automated approach to setting Archiving and Disposal dates, this is covered in a separate guide.
Review Date	You can set a date for a file to be reviewed and change this date at any time.

Subscriptions	E-mails can be sent to you to advise you of any changes to a file or folder. This enables you to keep track of documents of interest.
Workflows	Workflows may be assigned to documents before publication, functionality includes:-
	Multiple stages
	Approve or reject documents
	Automatic notification of originator
	Automatic notification of next approver
	Audit trail.
Categories	Files can be associated with a category containing metadata about the file. This enables the advanced metadata search facility.
Detailed Auditing	A thorough log is kept for each individual document and folder, recording all activity carried out by users.

1.4 EDRMS EFFICIENCY

As a user of EDRMS, it may be useful to you to know how the features of this product can increase your productivity and provide you with greater convenience.

Work Requirement	EDRMS Provides	User Benefit
Accessing and managing files	Universal access to files using a user-friendly interface that will be familiar to anybody, even with very minimal computing experience.	No need to learn a new interface in order to work with files stored in EDRMS.
Working on a project that includes multiple types of files	Unified access to multiple file types; the EDRMS interface enables you to work with many types of data: • Word processing files • Spreadsheets • Web pages • Audio and Video files • E-mail messages • XML	You don't have to deal with separate file hierarchies stored in multiple applications. All your files, of whatever type, are visible when you open EDRMS.
Retaining multiple, earlier versions of the same file	Versioning	Versioning allows you automatically save earlier versions of each file, allowing you to track the development history of files. If you are unhappy with recent file changes, you can access an earlier version rather than attempting to re-create the file.
Managing file access on a collaborative project	Check-in/Check-out	Check-in/Check-out lets you restrict when others can edit your files. While you're working on the file, you check it out; others can read your files, but no one can overwrite your work.

2 GETTING STARTED

2.1 OVERVIEW: GETTING STARTED

The Web browser interface allows you to access and use the EDRMS system. It requires no special utilities or other browser features. However, you must have JavaScript enabled in your web browser preferences.

You should note that ActiveX is not required to use the standard Web browser interface; however Java and Flash are required for the Advanced Viewer.

Currently, the browsers certified to work with EDRMS are:-

- Microsoft Internet Explorer 9.0 and above
- Firefox 1.0 and above
- Google Chrome 18 and above.

If you need any assistance with the above, please contact your System Administrator.

The topics covered in this section are:-

- Accessing EDRMS
- Home Page
- Folder Hierarchy.

2.2   MY WORKSPACE

My Workspace is the default working area for the department that you are currently working from and can also be accessed at any time by clicking the "My Workspace" link under the Workspace tab on the navigation bar.

You will be able to see all the folders in your current department, including the documents, and will be able to work on these documents.

You can also view folders belonging to other departments for which you have been granted access.

For users who utilise BPM, work tray items will also appear in the inbox. Actions that you can perform on documents are explained later in this guide.
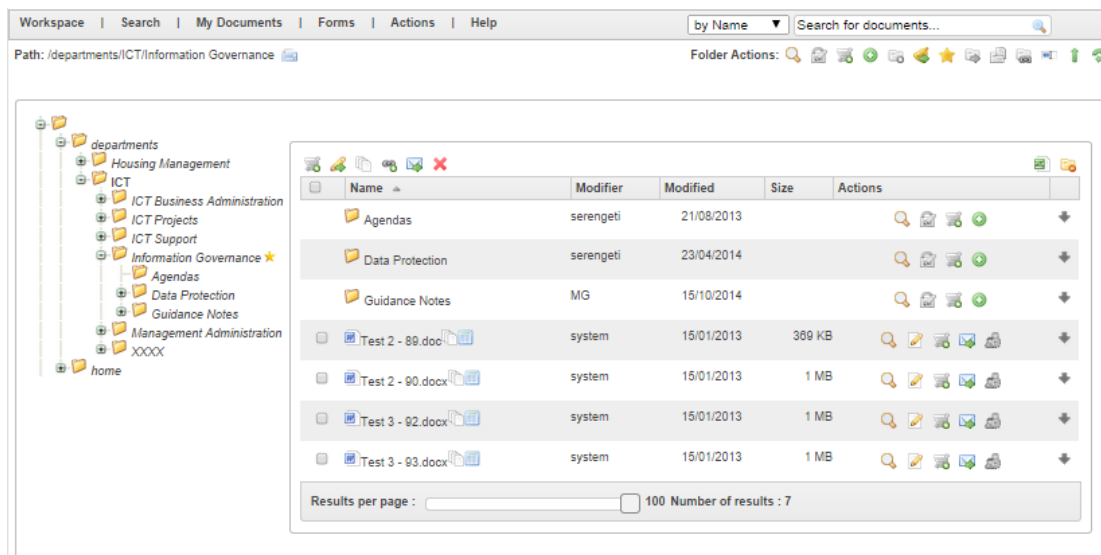
Figure 2.2.1 – My Workspace

2.3   HOME PAGE

The Home Page is your personal working space and can also be accessed at any time by clicking the "Home" link under the Workspace tab on the navigation bar.

Anything uploaded into your Home directory can only be accessed by you.
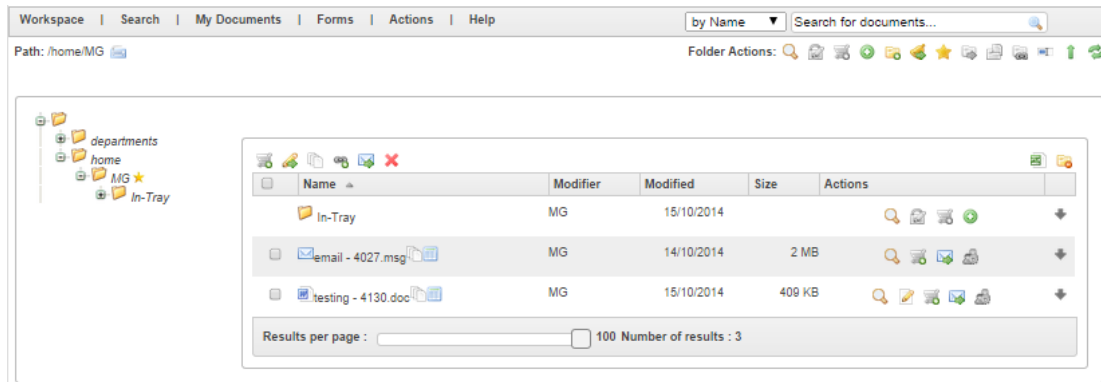
Figure 2.3.1 – Home Page

As you can see from figure 2.3.1, your home page is located within the repository under "/home/<name>". The documents located within this folder are shown to the right. Each icon in the Actions column alongside the document shows the actions that can be performed on it. The folder actions allow you to perform actions such as upload files, create sub-folders, subscribe to the folder and check the folder properties. To perform actions on multiple files simultaneously, simply select the documents using the check boxes and use the icons above these.

2.4 INBOX

This is your EDRMS inbox, where you are able to keep track of your internal messages, active workflows, and documents that are checked out. You can access this at any time by clicking the "Inbox" link under the Workspace tab on the navigation bar.
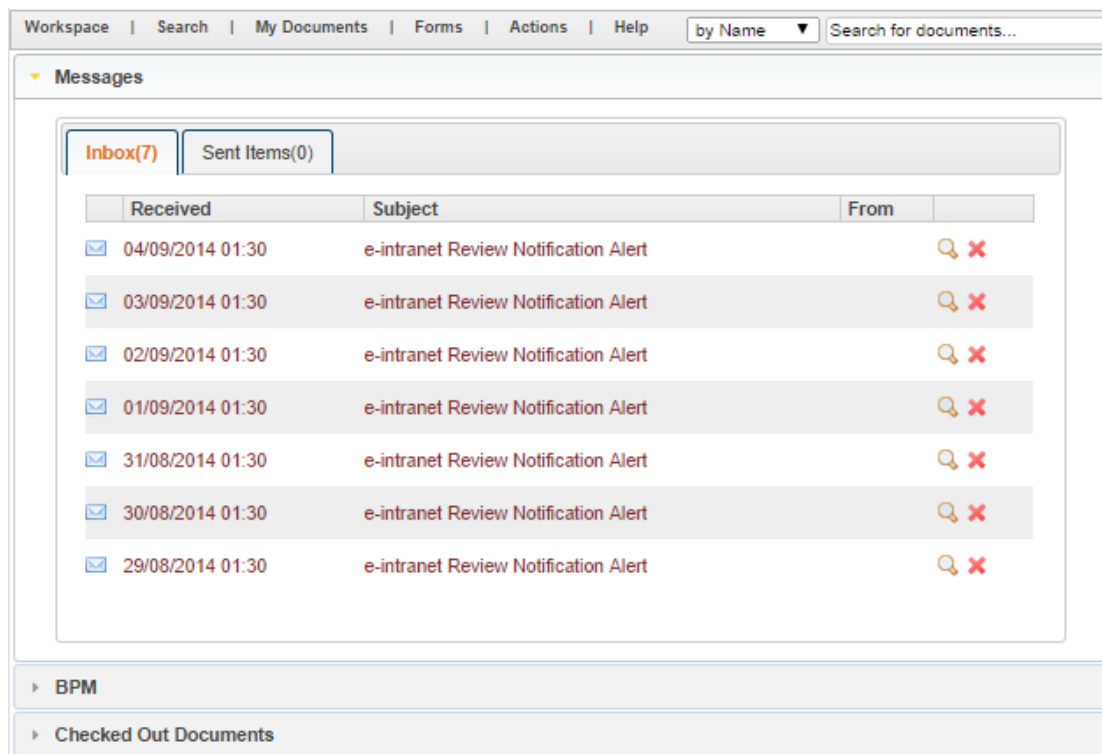
More on how to use the inbox is featured later in this document.

Figure 2.4.1 – EDRMS Inbox

2.5 DOCUMENT ACTIONS QUICK REFERENCE

The following lists all actions that can be performed at the document level. Further details about this functionality can be found later in the user guide.

INDIVIDUAL DOCUMENT LEVEL

These actions are performed using the icons associated with each document.

Document Details – This takes you to the document details page to view indexation, version, permissions, workflows, logs and properties.	**Modify Subscription** – This lets you subscribe or unsubscribe yourself from a document.
Apply Indexation – This takes you to the indexation page and allows you to select a category for the document and apply indexation.	**Add Association** – This lets you associate documents together.
Check out – This checks out a versioned document, locking it until you check it back in again.	**Manage Associations** – This lets you view other documents associated with a document.
Check in – Checks in a document that has previously been checked out, this document becomes the latest version.	**Delete** – This lets you delete a document.
Cancel Checkout – This cancels the checkout of a document.	**Add To Clipboard** – This adds a document to the clipboard.
Make Versioned – This makes the document versioned.	**Add To Favourites** – This adds the document to your favourites list.
Set Permissions – for Business Admin users only.	**Add Note** – This lets you add notes that are associated with the document.
Workflow Approval – This lets you apply a pre-defined workflow to a document.	**Send Document** – This lets you send a document or link to a document to other EDRMS users and external recipients.
Save as PDF - This lets you convert any Microsoft Office document to a PDF version.	**Lock Document -** Allows the document to be reserved, so that other users cannot access it**.**

	Edit Document- Allows Microsoft Office documents to be edited.		**Download File –** This downloads the document to your Downloads folder.
R	**Declare Record** – (requires Record Management) declaring a document as a record means it cannot be altered in any way.		**Make Public** – (optional module required) enables a button on the document details page for copying a link to the document.

MULTIPLE DOCUMENT LEVEL

These actions are performed using the icons associated with the folder contents on documents that have been selected by ticking their associated check boxes.

	Add To Clipboard – This adds documents to the clipboard.		**Add Association** – This lets you associate documents together.
	Make Versioned – This makes the selected documents versioned.		**Delete** – This lets you delete the selected documents.
	Email - This lets you send multiple documents as links or attachments to other EDRMS users and external recipients.		**Apply Indexation** - Takes you to the indexation page and allows you to select a category and apply indexation over multiple documents.

CLIPBOARD ACTIONS

These actions are available once a document has been posted to the clipboard

	Save as PDF – This lets you convert any Microsoft Office document to a PDF version.		**Associate** – This lets you associate documents together.
	Make Versioned – This makes the documents versioned, allowing you to upload new versions of the documents.		**Remove** an individual document from the clipboard. **Clear** all documents from the clipboard.
	Move To – move documents from the clipboard into the currently selected location.		**Email** - This lets you send multiple documents as links or attachments to other EDRMS users and external recipients.
	Paste to – copies documents in the clipboard into the currently selected location. **Paste as link to** – pastes documents as links to the originals, allowing you to access the document as if it was in both locations.		**Apply Indexation** - Takes you to the indexation page and allows you to select a category and apply indexation over multiple documents.
	Download as PDF – Allows user to download a document locally as PDF.		**Concatenate –** Allows users to concatenate multiple documents as a single PDF document.

DOCUMENT ICONS QUICK REFERENCE

Document Type – these icons appear before the document name			
	Microsoft Word Document		Microsoft Excel Document
	Microsoft PowerPoint Presentation		Image File
	PDF Document		Compressed Zip File
	Text Document		Unknown Document Type
	Markup Document (such as HTML, XML, etc).		

Document Status – these icons appear after the document name			
	This Document Is Versioned		This Document Has Metadata Associated With It
	Document was created from a Form or Advanced Form.		Document is an external document, has been archived.
	This Document Is Checked Out By Another User		You Currently Have This Document Checked Out
	This Document Has Associations (with other documents).		Document has notes attached, hover on the icon to view them
	Document has been made a record (requires Record Management).		Document has been made public (optional module required).

FOLDER ACTIONS QUICK REFERENCE

The following lists all actions that can be performed at the folder level. Further details about this functionality can be found later in the user guide.

	Folder Details – This takes you to the Folder Properties page to view details of the folder, and a log of actions performed on it. Click the 'Back' button to return.		**Upload** – This lets you upload a document to the currently selected folder or automatically upload to its correct location in the folder structure (as set in the Category Import Config).
	Create Folder – This lets you create a new subfolder.		**Add To Favourites** – This adds the folder to your favourites list.
	Modify Subscription – This lets you subscribe or unsubscribe yourself from a folder.		**Set Permissions** – for Business Admin users only.
	Add To Clipboard – This adds the folder to the clipboard.		**Move To** – Clicking this icon will physically move the contents of the clipboard to the current folder.
	Up Folder – Go one level up on the folder tree.		**Refresh** – This refreshes the current folder contents.
	Paste to – This will paste, effectively copy, the contents of the clipboard to the current folder.		**Paste (As Link) to** – Will paste a link for each document held in the clipboard. The document is neither copied nor moved.
	Rename – This lets you rename a folder.		**Delete** – This lets you delete the folder.

OTHER ACTIONS QUICK REFERENCE

The following lists all other actions that can be performed and icons that can be found. Further details about this functionality can be found later in the user guide.

	This icon denotes an unread message in your message inbox.		This is used to identify an applied category in the Apply Indexation screen.
	This icon denotes a read message in your message inbox.		This is used to identify a category that you can apply in the Apply Indexation screen.
	This is a folder as seen in the folder tree.		This lets you remove a file association and can be found in the Manage Associations page.
	Clicking this will return you to the main page. For instance, it will return you to the document repository from the document details page		This lets you download the list displayed on workspace or search results as a CSV
	This allows you to hide folders if they are displayed in the workspace before documents (this is a preference set by an administrator).		This indicates that folders have been temporarily hidden on the workspace display, clicking it reinstates them.
	This lets users type in the folder path they wish to browse and go directly to that folder.		Once a user has typed in a folder path in Path input box, they can click on this to open that folder.

2.6 FOLDER HIERARCHY

The folder hierarchy is an organisational structure of one or more folders in EDRMS. Folder hierarchies organise the repository so that users can browse through it easily and securely.

Since different users may want to organise their information in different ways, EDRMS allows the creation of multiple folder hierarchies to organise its content in different ways, making browsing convenient. For example, the Sales, Development, Marketing, and Consulting departments of a company may all use different hierarchies.

By creating EDRMS departments for each company department, the system automatically creates the necessary folder structure, allowing each department to create and maintain their own structure.

2.7 SWITCHING DEPARTMENTS

When you log into EDRMS, if you are a member of more than one department, you will be prompted to choose which department you would like to log into, as shown in the figure below.

Figure 2.7.1 – Choose a Department

If you are member of only one department, you will be taken directly to that department, and to the page specified by your Administrator, such as Inbox, Workspace etc.

At any time you are able to switch departments, by hovering over the department name next to your username where you will be able to select another department to work from.
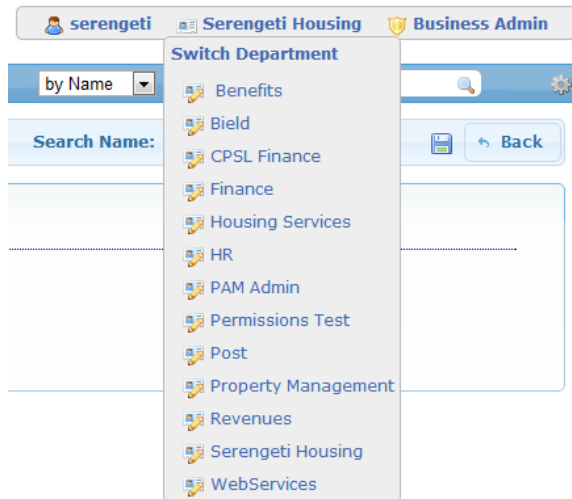
Figure 2.7.2 – Switching Departments

3 WORKING WITH FOLDERS

3.1 OVERVIEW: WORKING WITH FOLDERS

This section describes the folder management features of EDRMS and shows you how to manipulate folders.

The topics covered in this section are:

- Folder Navigation
- Folder Maintenance
- Folder Details.

3.2 FOLDER NAVIGATION

USING FOLDER TREE

In Liberty EDRMS, access to folders is controlled by Permissions. Permissions can be applied to folders at any time, to grant or revoke privileges to users, groups of users or departments. These permissions include actions such as Delete, Read, Create Subfolders and Modify. Therefore, to browse a folder you must first have access to that folder.

As you can see from figure 3.2.1, the folder structure in EDRMS is displayed in the standard Windows format.

To expand a folder and view its subfolders, simply click the "+" beside it or select the folder itself. To collapse a folder, click the "-" beside it.

To view the contents of a folder, select it from the tree. The contents will be displayed in the Folder Contents section as described in Section 4, Working With Files.

The star icon indicates the currently selected folder.

The department folder highlighted in **bold** is the department you are currently logged in to. All other folders are clearly marked in *italics*.

You can navigate to your home folder by expanding "home" then selecting your personal folder. You can navigate to your department folder by expanding "departments" and selecting your department.

Figure 3.2.1 – Folder Structure

USING WORKSPACE

Using the system preferences, an Administrator can choose to display folders in the workspace along with documents. Users can choose to hide or display folders in the workspace using the icon ![icon] or ![icon].

USING FOLDER PATH

Users can click on the icon ![icon] to type in the folder path they wish to open.

Path: /departments/Serengeti Housing ![icon]

Figure 3.2.2 – Folder Path Bar

On typing the folder path, the system will auto complete the folder path and clicking on the icon ![icon] will take users directly to that folder.
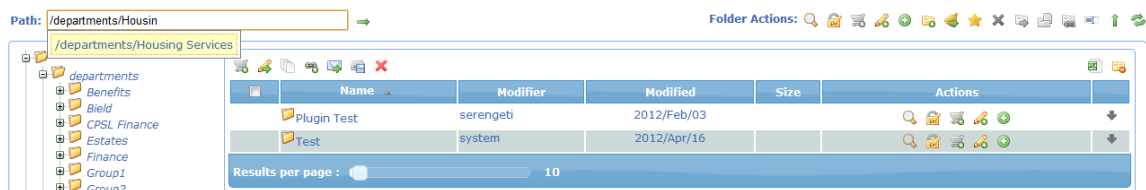
Figure 3.2.3 – Folder Path Input

3.3   FOLDER MAINTENANCE

There are a number of actions you can perform on a folder. The availability of these actions is determined by your user role and the permissions placed upon the folders. For instance, if you do not have permission to delete a folder, you will not see the delete icon.

There are two ways of getting to the folder actions. The folder actions across the top of the page, relates to the folder currently selected in the folder tree, or selecting the arrow next to a folder will provide the actions available on that particular folder.

Figure 3.3.1 – Folder Actions

3.3.1 CREATING FOLDERS

To create a folder, select the Department/Folder where you wish to create it and click on the Create Folder icon. The Create Folder screen will open, allowing you to either enter a new folder name or to apply an existing folder template.

Once a new folder is created it will appear as a subfolder of the current folder in the folder hierarchy. If, on the other hand, you apply a folder template, the entire template folder structure will appear as subfolders.

Please note: folder names can only contain letters and numbers. Characters such as £$&-#@ cannot be used.

3.3.2 DELETING FOLDERS

To delete a folder, select the folder you want to delete and click the folder action Delete button . After you have accepted the confirmation message, the folder and all its contents will be deleted.

Please note: all deleted items are stored in the deleted items area for a period of time specified by your site administrator. To restore any deleted items, please contact your site administrator with the name of the item and the date it was deleted.

3.3.3 UPLOADING DOCUMENTS

There are two ways to upload a document:

1. Advanced upload

2. Upload a document to the currently selected folder.

1. If enforced indexation has been turned on by your technical / site admin user

   then the upload button will not be visible, therefore documents can only be uploaded using 'Advanced upload' This has the advantage of allowing additional Data to be added to the document i.e. 'date received' and for the document to be placed in a category. By adding indexation you have the option of automatically placing the document(s) into the correct folder structure. This is setup by your Technical / Site admin users creating an Import Config on the category to be applied.

2. If enforced indexation is not turned on then you can only upload documents to the currently selected folder.

   To upload document(s) to the selected folder simply navigate to the folder in which you want to upload it and click on the Upload folder action icon. The Upload screen will open, allowing you to browse to the required document(s) for upload.

Upload Files

Please select the file(s) you wish to upload, and then click "Upload". In order to add another file input box, click on "Upload Another File"

☐ Extract any zip files on upload   ☐ Upload Another File

Select File	Info
Browse...	Description

↗ Upload   ↶ Cancel
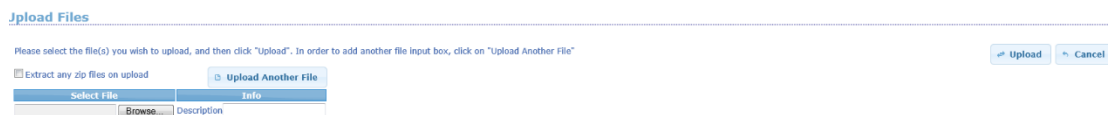
Figure 3.3.2 – Browse document for upload

Once the required documents have been uploaded, there are various actions that can be completed.

Upload Summary

📄 user_role flow.docx *(13 KB)* 🔍 🖊 ✉

Actions

🖊 ◀ 🔗

Review / Archive Dates

Review Date: [   ]
Archive Date: [   ]
[Save]
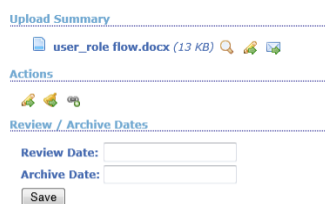
Figure 3.3.3 – Upload actions

- Review & Archive dates can be added.

- If more than one document was uploaded they can be associated with each other. 🔗

- You can create a subscription to the document. 🖊

- You can apply indexation 🖊

See section 6.3 for full instructions on Categories & indexation

3.3.4 ADDING FOLDER TO CLIPBOARD

Before you copy, move or paste a link to a folder, you must first add it to the Clipboard. To do this, select the folder you want to move and click the folder action "Add to Clipboard" button. 🛒 The folder will then appear in the Clipboard.
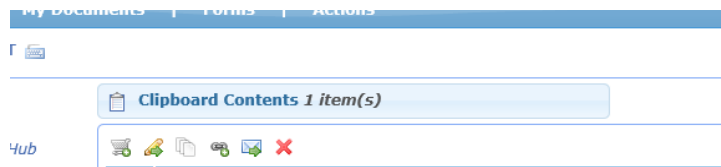
Figure 3.3.4 – Add to clipboard

You can remove a folder from the Clipboard by clicking the remove icon ❌ within the clipboard content box.

3.3.5 MOVING FOLDERS

Once the folder has been added to the Clipboard, you must navigate to the new folder location and open it.

Go back to the clipboard and click the Move Here folder action icon. This will move the folder and all of its contents to the new location.
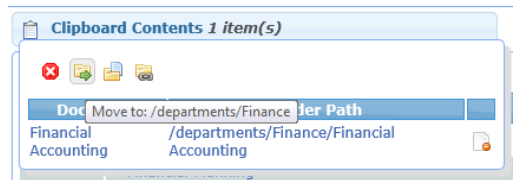
Figure 3.3.5 – Move folder

3.3.6 COPYING FOLDERS

Once the folder has been added to the Clipboard, you must navigate to the location you want to copy the folder to open it.

Go back to clipboard and click the Paste Here icon. The folder and all of its contents will be copied to the new location.
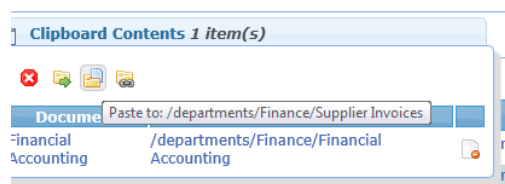
Figure 3.3.6 – Paste to Folder Actions

Please note: copying a folder to another directory creates a second folder, separate from the original. Any changes to one folder will not be replicated in the other.

3.3.7 PASTING LINKS TO FOLDERS

Once the folder has been added to the Clipboard, you must navigate to the location you want to add a link to and open it.

Go back to clipboard and click the Paste Here (As Link) icon. This will paste a link to the original folder, allowing you to browse the folder and its contents as if it was in two locations.
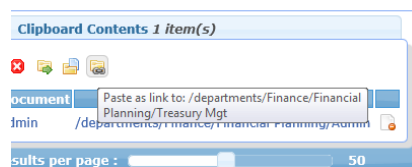
Figure 3.3.7 – Paste link to Folder

Please note: pasting a link to a folder to another directory will not create a second folder. Instead it only pastes a link to the original. Therefore, any changes to one folder will be viewed from the other.

3.4 FOLDER DETAILS

Every folder has details (properties) that can be viewed by clicking the Folder Details icon. 🔍

Figure 3.4.1 – Folder Details

There are 2 tabs on the details page, one for folder details and other for audit logs.

The folder details include the full folder path, the folder owner, the creator of the folder and the date it was created, the last modifier and date of last modification, the number of documents contained with the folder along with the number of subfolders, and finally details about the permissions applied to the folder.

If you click the "Click here to display recursive counts" link, this will display all documents and subfolders contained beneath the folder. This is not shown by default as displaying this information could take some time.

The audit log tab list all action related to the folder.

To return from folder details, click the Back icon.

3.4.1 SUBSCRIBING TO FOLDERS

Within the folder actions if the 'Modify Subscription' ✋ flag is set, then the user will receive an email notification any time the folder is modified.

- Click on ✋ and then click on 'Create subscription'. – Ticking the 'Recursive' field, will also provide updates on subfolders, connected to folder selected.
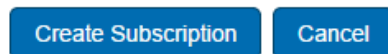
Modify Subscription

Modify Subscription on Folder : /departments/ICT/Information Governance

Recursive? ☐

<p align="center">Figure 3.4.2 Modify Subscription</p>

3.4.2 ADD TO FAVOURITES

Selecting this icon ⭐ will place the folder directory in your favourites, making it easier to navigate to if the folder structure is very complex.

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4 WORKING WITH DOCUMENTS

4.1 OVERVIEW: WORKING WITH DOCUMENTS

This section describes the document management features of EDRMS and shows you how to maintain and manipulate files.

The topics covered in this section are:-

- Document Management
- Document Details

4.2 DOCUMENT MANAGEMENT

There are a number of actions you can perform on documents. The availability of these actions is determined by your user role and the permissions placed upon the documents. For instance, if you do not have permission to delete a document, you will not see the delete icon.

Figure 4.2.1 – Document Actions

4.2.1 VIEWING DOCUMENTS

The document can be opened by either clicking on the document name or by clicking on the magnifier 🔍. This will open the details page on the Properties tab and the document will be displayed on the right hand side of the screen.
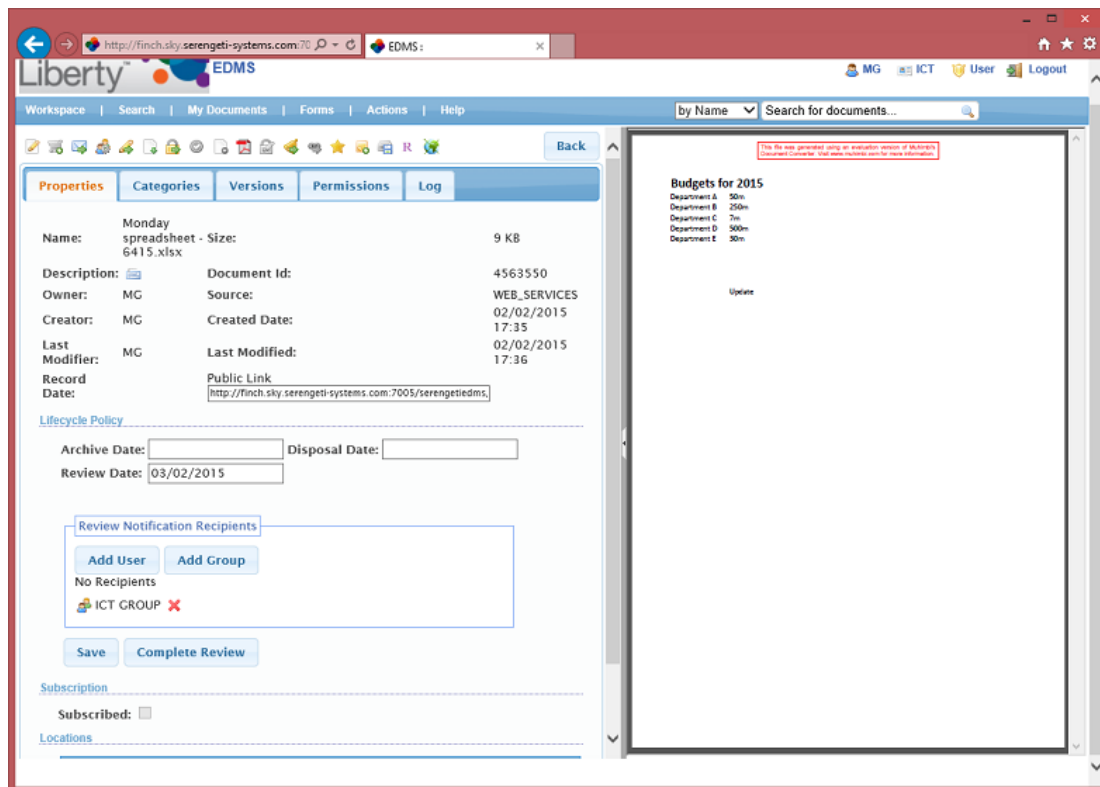
Figure 4.2.2 – Document viewer and Properties tab

If the **Description** can be edited, there is a 🖊 button – click this then type a description and click Save.

Record Date has the date this document was marked as a Record.

Public Link is displayed for documents that have been made public (a document action that is enabled by an optional feature). Click on 'Public Link' to highlight the link in the text box below, now type Ctrl+C to put the link into your copy-and-paste buffer. You can now paste (Ctrl+V or shift+Insert) the link into an intranet page or an email. You can also select Public documents in searches, see section 7 Searching EDRMS.

The **Lifecycle Policy** section has archive, review and disposal dates, these are covered in sections 11 Review Date and 12 Archive Date.

Subscription is covered in section 9.

The way the document is displayed is dependent on whether the PDF converter is available.

The Eintranet PDF module replaces the inline viewer that is currently used in eintranet; and allows MS Office documents to be viewed within the browser.

It takes the file and converts it to a PDF; which is un-editable, preventing users from trying to edit within the viewing pane.

The Site Administrator will be able to confirm if the PDF convertor is available.

4.2.2 SORTING DOCUMENTS

To make it easier to locate files, you are able to sort lists of files by their filename and last modified date, in both ascending and descending order. This is done by clicking the header of "Name" or "Modified," and again to reverse the ordering.

4.2.3 PAGINATION OF SEARCH RESULTS

When viewing results that contain a large amount of files, this can become difficult to scroll through and navigate, pagination has been implemented to split the results into separate pages. You can navigate through the individual pages of results, or skip directly to the first or last page.

To do this, click on the arrows at the bottom right of the screen to cycle through the pages, you can also click on the page number itself. The current page number is marked with an underline, see number 7 in the figure below.

You can also modify the number of items displayed on each page using the "Results per Page" slider which will automatically refresh the page with your selection.

Figure 4.2.3 – Pagination of search results

4.2.4 EDIT DOCUMENTS

You can edit Microsoft office documents within the EDRMS by clicking on the Edit Document icon. This will then load the relevant application e.g. Microsoft Word for .doc files. This will also check out in the document to your user within the EDRMS.

> Note: Microsoft Office 2013 opens all documents downloaded from a browser in 'Protected View' mode. Microsoft added this as one of the security features in Office 2013 to help protect end users from embedded plugins. To change the setting in Word: select File, Options, Trust Center, Trust Center Settings. Select Protected View, un-check Enable Protected View for files originating from the Internet. Click on OK to close the Trust Center then OK to close Options.

Amend the document as required and then click on 'Liberty EDRMS' on the top tool bar and then click on 'Save'.

Figure 4.2.4 – 'Save to Liberty EDRMS'

You will then be required to enter your EDRMS login & password, to log in to MS Plug in (ticking 'remember me' will prevent you from having to do this again, during this session).

The document will now be checked back in and a new version will be created. You can see the versions by selecting the Versions tab.
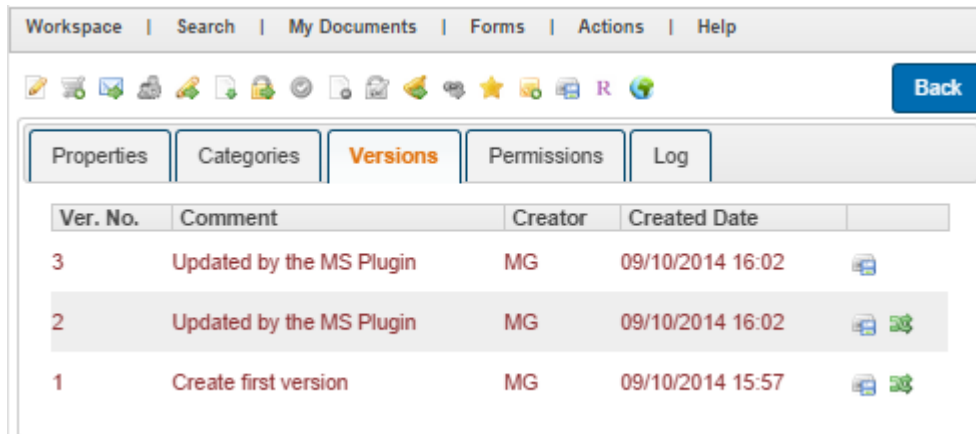
Figure 4.2.5 – New version of Document

Further information on the MS Plugin can be found in a separate User Guide.

4.2.5 RENAME DOCUMENTS

Once the document has been added to EDRMS, you may wish to change the filename, this can be done by double clicking in the row in the space after the filename and icons. Please note that this function can be enabled/disabled by an Administrator.
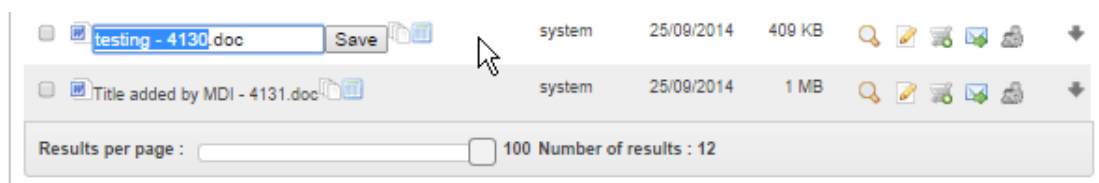
Figure 4.2.6 – Document Renaming

Type the new filename and press enter or click the "Save" button.

You are able to rename files from within the Workspace, or from the results of a search.

Please note: similarly to the Windows File structure, you cannot have more than one document within the same directory with the same filename. If you wish to have two files with identical filenames, they will need to reside in separate folders.

4.2.6 DELETING DOCUMENTS

Whether you can delete a document or not, will depend on the permissions set by the Business Administrator. There are two ways to delete documents. The first is to click the Delete icon beside the relevant document; the second is to select the check box for the document and click the Delete icon at the top of the folder contents pane. The second option lets you delete multiple documents at once.

Please note: all deleted items are stored in the deleted items area for a period of time specified by your Site Administrator. To restore any deleted items, please contact your Site Administrator with the name of the item and the date it was deleted.

4.2.7 DECLARE AS A RECORD

Depending on whether the functionality is enabled by the Site Administrator, the user will have the ability to declare a document as a record by selecting the 'Declare record' icon.

R

When a document is declared as a record, it ensures that is cannot be modified or altered in any way. Functions such as Delete, Apply Indexation, Set Permissions, etc. will all be greyed out. Review, Archive and Disposal dates will also be greyed out preventing change.

However functions such as Add to favourites, Modify subscription, Add Note & send Document will still be available.

4.3 CLIPBOARD FUNCTIONS

4.3.1 ADDING DOCUMENTS TO CLIPBOARD

To add a document to the clipboard first find the document you want to add and click the document action Add to Clipboard button. The document will then appear in a box at the top of the screen along with any other documents you currently have on the clipboard.

Alternatively you can add multiple files to the Clipboard simultaneously by selecting the relevant check boxes and clicking the Add to Clipboard icon at the top of the folder contents pane.

You can remove a document from the Clipboard by clicking the remove icon next to the individual document or empty the entire clipboard by clicking the clear icon.

4.3.2 MOVING DOCUMENTS

Once the document has been added to the Clipboard, you must navigate to the new document location open the folder and click the Move Here folder action icon. This will move the document to the new location.

4.3.3 COPYING DOCUMENTS (PASTE TO)

Once the document has been added to the Clipboard, you must navigate to the location you want to copy the document to and click the Paste Here icon. The document will be copied to the new location.

Please note: copying a document to another directory creates a second document, separate from the original. Any changes to one document will not be replicated in the other.

4.3.4 PASTING LINKS TO DOCUMENTS

Once the document has been added to the Clipboard, you must navigate to the location you want to add a link to and click the Paste Here (As Link) icon. This will paste a link to the original document, allowing you to access the document as if it was in two locations.

Please note: pasting a link to a document to another directory will not create a second document. Instead it only pastes a link to the original. Therefore, any changes to any one document will be visible from the other.

4.3.5 PDF GENERATION

Current file types supported by PDF Generation are:

- o Microsoft Word (doc,docx)
- o Microsoft Excel (xls,xlsx)
- o TIF documents
- o PDF documents

4.3.6 VIEW DOCUMENTS AS PDF

The EDRMS has the ability to generate a PDF preview of documents with certain file types that are currently stored within EDRMS. This facility exists as users may not wish to create a document in PDF format straight away, opting to preview the document in order to see what it looks like before going through the process of finalising the creation of the document.

The first step in the process of previewing a document is to navigate to the workspace within the EDRMS and find the document you wish to preview. Once you have navigated to the document you wish to convert, you can select by using the tick box beside the document name, as can be seen by **Figure 4.3.1**
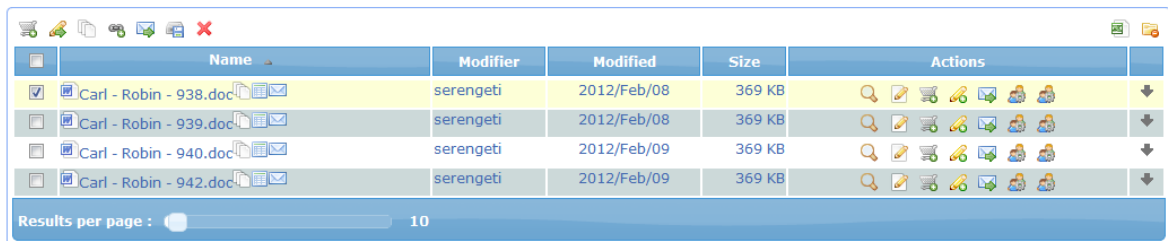
Figure 4.3.1 – Selecting document for PDF Preview

The next step in the process is to add the document to the clipboard. From here you can use the 'download as PDF' button. See **Figure 4.3.2**
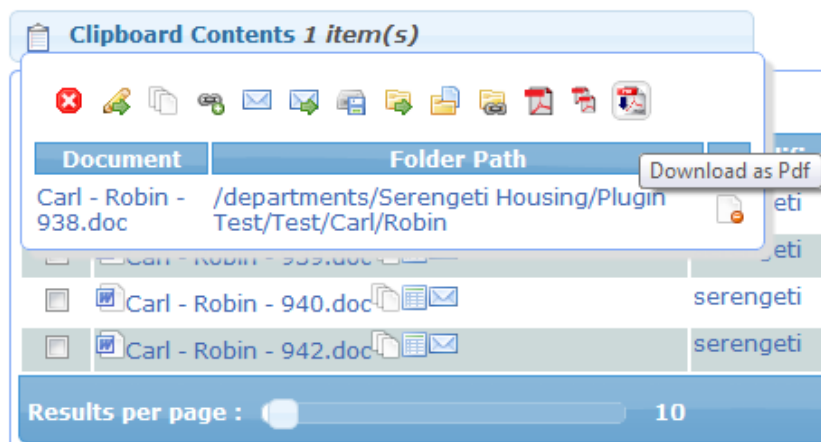
Figure 4.3.2 – Download as PDF

Once this is clicked it will prompt you to either open the document or save it to the browsers download directory. It should be noted at this stage that selecting open or save file the document will not been saved within EDRMS. Selecting open will merely open the file within the PC's default PDF viewer. If save is selected then it will be saved to the current browsers download directory on the PC's local hard drive, displayed in **Figure 4.3.3** The preview document will always have a default name of 'concatenated.pdf'.
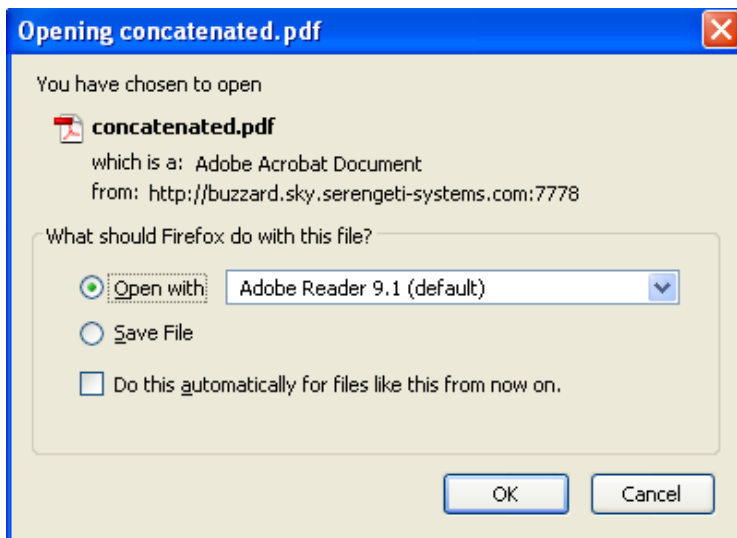
Figure 4.3.3 – Selecting document for PDF Preview

The document can then be previewed to give the user confidence that the PDF generation will produce a crisp and clean PDF before storing the document away in the EDRMS as demonstrated in **Figure 4.3.4.**

Figure 4.3.4 – Display a preview of converted PDF

4.3.7 SAVE DOCUMENTS AS PDF

Following on from the previous section of previewing document users may wish to save a document as a PDF. This can be done by once again navigating to the appropriate document within the workspace. An example is shown in **Figure 4.3.5**

Figure 4.3.5 – Navigate to a document to convert to PDF

Instead of using the generic file icons as per the method for PDF previewing, users must navigate to the individual file actions which can be found on a file by file basis under the 'Actions' header. Typically the PDF viewer icon of interest will be hidden by default and will require expansion via the arrow icon. By expanding these file actions for the relevant file the user will be greeted with a 'save to pdf' button. This icon is shown in **Figure 4.3.6**.

Figure 4.3.6 – Selecting document to save to PDF

Selecting this button, if the file type is supported (see introduction for list of file types supported by the module) will convert the document into a PDF document. The converted file will inherit the filename of the document therefore it is important to make sure that no other PDF document with the file name that is to be converted currently exists within the directory. Also any indexation that has been applied to the target document will also be inherited to the newly created document shown in **Figure 4.3.7**.

Figure 4.3.7 – Creation of PDF document

4.3.8 CONCATENATE DOCUMENTS TO PDF

Documents which are currently stored in the EDRMS may have a significant relationship that storing them together under a single document provides easier access to the information required, as opposed to previous EDRMS features such as file associations. It also allows different users to append each other's documents as and when needed. Document concatenation allows users to fuse two or more documents if their file type is supported into a single PDF document.

The example shown is a legitimate use of document concatenation as the user wishes to add an appendix to a report document. As can be seen by **Figure 4.3.8** a concatenation button is listed within the generic file actions. In order to perform this concatenation select the appropriate documents via the the checkboxes andadd them to the clipboard. Once in the clipboard, the documents can then be merged by selecting the concatenate icon.
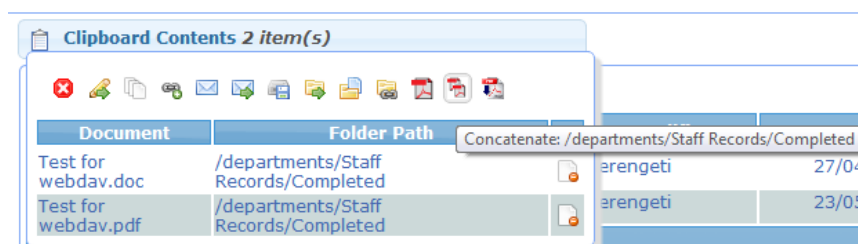
Figure 4.3.8 – Selecting Document Concatenation

Once selecting the number of documents you wish to concatenate there are a variety of options before the new concatenated document can be created, displayed in **Figure 4.3.9**. The first of these is the sequence in which you wish the documents to be concatenated (they will begin in alphabetical order). To toggle the ordering, use the sequence arrows to move the selected documents ordering position. Secondly there is a facility called 'Add Blank Page' which will add a blank page between every document that has been concatenated.
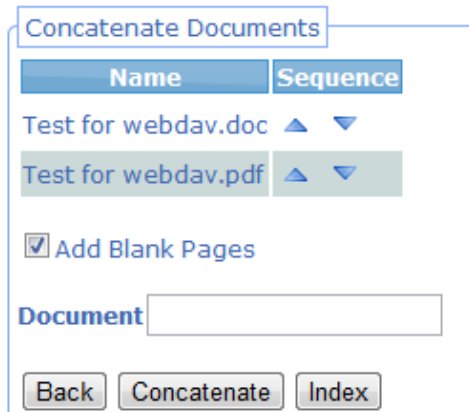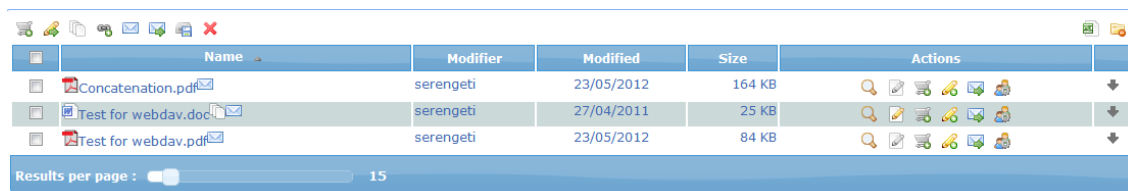
Figure 4.3.9 – Sequencing of Documents

Unlike previous methods which have been direct copies of a document and thus have inherited indexation and filename the merging of two documents together may mean that either the indexation or filename is no longer appropriate. Therefore the document textbox specifies what the document should be called. Supplying this will only leave you with two further options: to concatenate straight away and avoid indexation, or index the newly concatenated document.

Concatenating will produce a document with the given name but no indexation as seen in **Figure 4.3.10.**

Figure 4.3.10 – Concatenation Without Indexation

Selecting' index' will prompt the user to select a category that is available to department that they are currently logged into. This can be seen in **Figure 4.3.11**

Figure 4.3.11 – Selecting Category

Selecting a category to index will prompt the user to fill in fields that they wish to store against the document. This may have to be entered in manually or could be populated on a single field via a data retriever depending on the selected category setup. The 'Index, Move & Rename' button remains pale and disabled until all mandatory fields (marked *****) are completed.

Once indexation has been keyed in successfully, complete the indexation by selecting the appropriate action from the drop down list and then clicking on it.

Figure 4.3.12 –Index options

By selecting to move the document using the category it will use the information set in the Import Config on the applied category to relocate the document within the folder structure depending on the metadata set.

If you choose to rename the document using configuration it will then rename the document to what has been setup in the Import Config for that categories Filename Mask.

> **NOTE: If you do not select to move after upload then it will upload to the currently selected folder.**

Click on the 'Back' button to go back to the workspace.

4.3.9 ADDITIONAL CLIPBOARD FUNCTIONS

Other functions that be completed on the clipboard are

- Apply Indexation   covered in section 6
- Make Versioned   covered in section5
- Associate   covered in section 10

5 VERSION CONTROL

5.1 OVERVIEW: VERSION CONTROL

EDRMS gives you the ability to manage your data by using file versioning. This allows you to track any changes made to a file, storing a copy of each file version.

The topics covered in this section are:-

- Introduction to Version Control

- Making a File Versioned

- Checking Out

- Checking In

- Cancelling Check Out

- Version History

5.2 INTRODUCTION TO VERSION CONTROL

You can use file versioning to save the current and any subsequent versions of a file by checking it out and in. When you check in a versioned file, EDRMS automatically creates a version history that lets you access previous iterations of the document. When the version history is created, you must include comments for yours and others reference about the changes made. Versioning also adds value when you are the sole author of the file because it retains data that you might need again in the future. However, it is especially useful when you are working collaboratively with other content contributors on one or more files.

With versioning, you can retain the original and any subsequent copies of a file in the EDRMS repository while you make revisions to the file in your local working directory (this could be your local hard or a networked drive).

Versioned files must be checked in and out of the database. Checking a file out will lock it, meaning that no one will be able to edit that file while you work on it. Checking the file in again unlocks it, allowing other users with the appropriate permissions to access and edit it.

Whenever you check in a versioned file, EDRMS automatically keeps a copy of the older file and, over time, builds a version history for the file. For example, if you check out a memo, change it, and check it in again, then decide that you made a mistake; you can retrieve the previous version or an even older version instead of trying to reconstruct it from memory.

The following shows an example of a Version History:
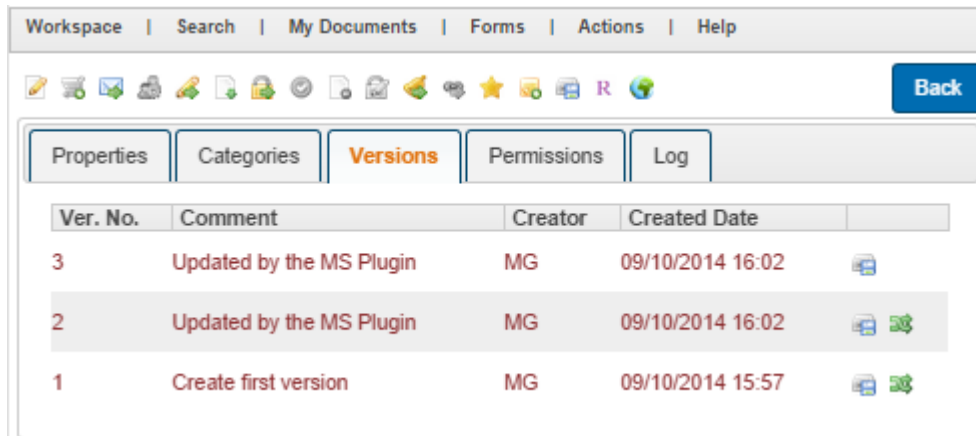
Figure 5.2.1 –Version History

All the versions shown in the version history, apart from the most recent version, may be viewed only and cannot be changed. However, users with appropriate permissions can download a previous version to their local drive and edit it. When the file is uploaded or checked in, having previously checked out the current version, it then becomes the current version.

5.3   MAKING A FILE VERSIONED

With effect from V6 of Liberty EDRMS, all uploaded documents will have versioning automatically switched on.

Documents uploaded before V6 may not be versioned. Where a document is not versioned, there will be an extra document action allowing you to add versioning to the document.

Figure 5.3.1 Make Versioned Document Action

Once versioned, the document will be tagged with the versioning icon:

When you hover your cursor on the icon, a panel is displayed showing the 5 most recent versions.
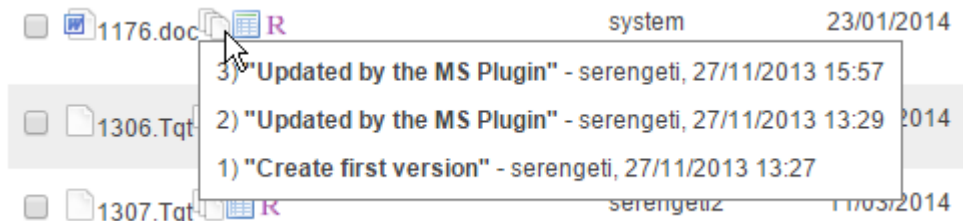
Figure 5.3.2 –Versioned Document

By moving documents to the clipboard, then several documents can be versioned at the same time.
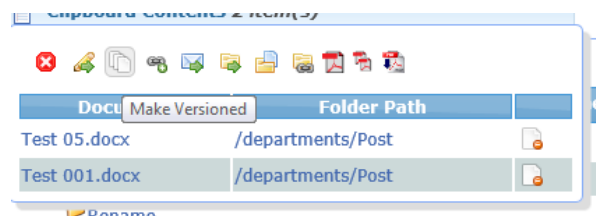
Figure 5.3.3 –Versioning documents from clipboard.

5.4   CHECKING OUT

To work on a versioned document, you must check the document out. This ensures that no one else works on the document at the same time and that all users work from the latest version.

To check a document out, you must browse to it and click the "Checkout" icon. This opens a download screen for you to save the document to your local or network drive.
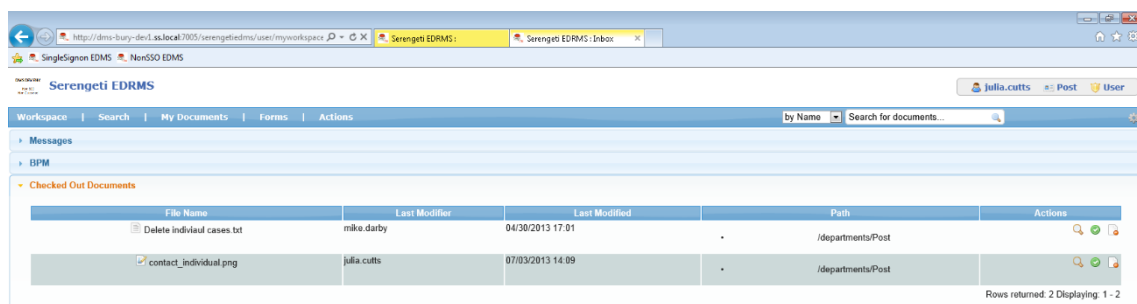
It is recommended that you save the document before editing it.

Once checked out, the document will be tagged with the "Checked Out" icon. If the flag is green, you have checked the document out and can either check it back in again or cancel the checkout. If the flag is red, the document is checked out by another user, hovering over the red flag will display the name of this user. Only that user can check the file in and only that user or a business admin user can cancel the checkout. When a document is checked out by another EDRMS user you will only be able to view the version of the document just before it was checked out.

Each time the document is checked back in a new version is created, you can view all of these from the versions tab within the document details.

Also, note that only versioned files can be checked out, files that are not versioned will not have this icon available. To make a file versioned and able to be checked out, click on the "Make Versioned" icon from the actions menu.

A list of documents that have been checked out by a user is available from the user's inbox.

Figure 5.4.1 –Checked out document in 'inbox'

5.5 CHECKING IN

You can only check in documents that have been checked out. The next time you check in a document, a new version is created. To check in a versioned file, navigate to the document and click the "Check in" icon.

From the Check in Upload screen, you can browse to the new version of the file and enter a mandatory textual description of the amendments made. Once uploaded you will be given the choice to apply indexation, create a subscription, set a review and/or archive date and send the document to internal or external recipients. In addition if more than one document is being uploaded they can be associated with each other.

Figure 5.5.1 –Checking in document

= Apply Indexation

= Send Document

= Create Subscription

= Associate

You can also check in an updated version of a file without checking it out, this is so users can save time. To check in a file that hasn't been checked out, navigate to where the file is and upload it using the same filename; you will be prompted that the following action will create a new version of the file, and must enter text indicating the reason for the new upload.

Also, note that only versioned files can be checked out, files that are not versioned will not have this icon available. To make a file versioned and able to be checked out, click on the "Make Versioned" icon from the actions menu.

5.6 CANCELLING CHECKOUT

To cancel a checkout you must navigate to the document and click the "Cancel Checkout" icon. This will immediately unlock the document for amendment by other users.

Only the user who checked the document out or a Business Admin user can cancel a checkout.

5.7   VERSION HISTORY

To view the version history of a file, you can view the 5 most recent versions by hovering your cursor on the versioning icon at the end of the filename on a document list. To see all versions, click the document's "Document Details" action icon and then select the "Versions" tab.

Figure 5.7.1 – Version History

The Version History screen shows the version history of the chosen file. It lists the order of versions, the comments associated with each as well as the user who checked it in and the date this was performed. You can also download a version by clicking the "Download File" icon.

It is also possible to reinstate an earlier version of the file if the current version is deemed to be incorrect, by clicking on the 'revert to this version' icon.

Figure 5.7.2 –Reinstate earlier version

6   INDEXATION

6.1   OVERVIEW: INDEXATION

EDRMS allows you to apply pre-defined categories to documents. This enables you to search for documents based upon the category metadata associated with them.

The topics covered in the section are:-

- What is a Category

- Applying Categories

- Viewing Metadata

- Changing Categories.

6.2   WHAT IS A CATEGORY

A category consists of a category name and a set of metadata. The category name and metadata headings are predefined by the site and technical administrators. Users can assign a category and input the associated metadata for a chosen document provided their respective departments have sufficient privileges.

Multiple documents can be associated with the same category allowing you to search for files using the criteria of a category name or any associated metadata. Multiple categories can be associated with the same document, allowing you to search for a file using a wide range of criteria.

Categories can also be organised in parent-child relationships. For instance, if a company has generic attributes that should be used for multiple categories, such as "COUNTRY", "OFFICE_ID", "ACCOUNT_NO", etc., these would have to be specified for each category. Instead, a single category can be created with these fields and then other categories can be created that inherit these fields from the parent category.

In the above example, there could be three child categories that inherit the parent attributes. One of these categories could also have child categories as per **Figure 6.2.1.**

```
                          ┌──────────────────┐
                          │ GEOGRAPHICAL     │
                          ├──────────────────┤
                          │ COUNTRY          │
                          │ OFFICE_ID        │
                          │ DOC_TYPE         │
                          └──────────────────┘
```
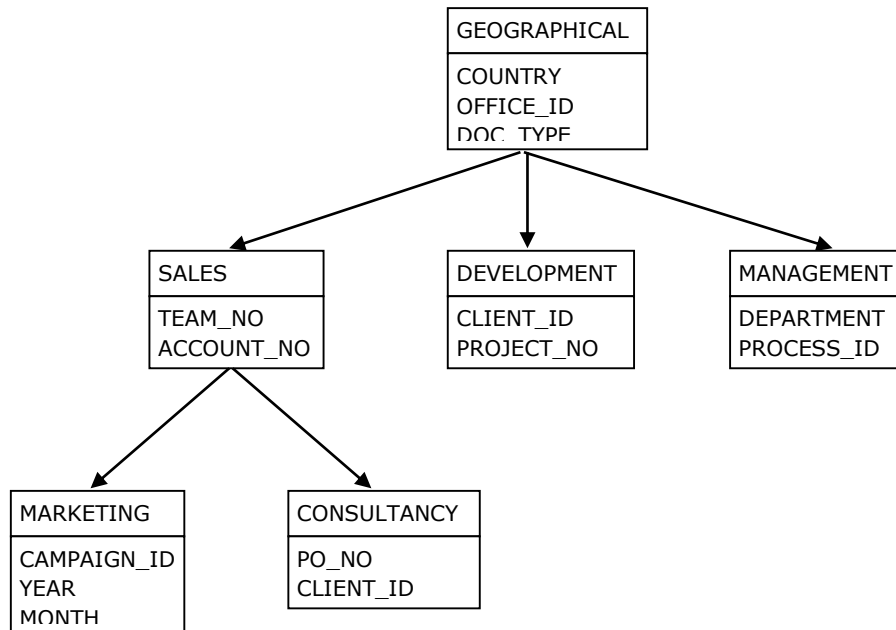

Figure 6.2.1 – Category Inheritance Example

In the above example, if the "MARKETING" category was applied to a document, the document would have the index fields "COUNTRY", "OFFICE_ID", "DOC_TYPE", "TEAM_NO", "ACCOUNT_NO", "CAMPAIGN_ID", "YEAR" and "MONTH". If, however, the category "SALES" was applied, the document would have the index fields "COUNTRY", "OFFICE_ID", "DOC_TYPE", "TEAM_NO" and "ACCOUNT_NO".

6.3   APPLYING CATEGORIES

There are two ways of applying categories to documents

- Advanced Upload
- Apply indexation to individual documents- either to existing documents or at the point of upload.

6.3.1 ADVANCED UPLOAD

Advanced upload can be found under Actions on the main toolbar.
You should select the folder you want to upload files to first.
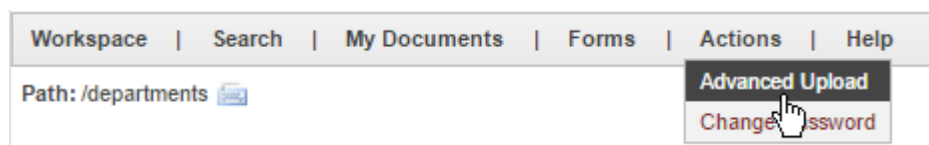
Figure 6.3.1.1 –Advanced Upload on the menu
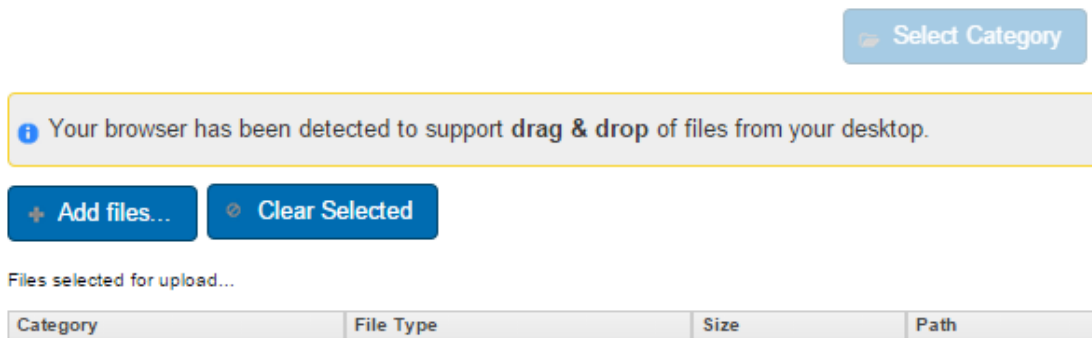
Figure 6.3.1.2 –Advanced Upload screen

If your browser supports drag & drop for selecting files, a message bar to this effect is displayed briefly. If you have a file explorer window open, you can select the files then simply drag & drop them onto the EDRMS window to have them loaded into the upload queue.

Click on the 'Add files…' button to open a file explorer window and choose files.

If you want to clear the list of files and start again, click on 'Clear Selected'.

When you have selected all the files you want for this upload, click on '**Select Category**', this brings up a selection of the categories you have access to in the department selected. When you have chosen a category the attributes are displayed for completion.
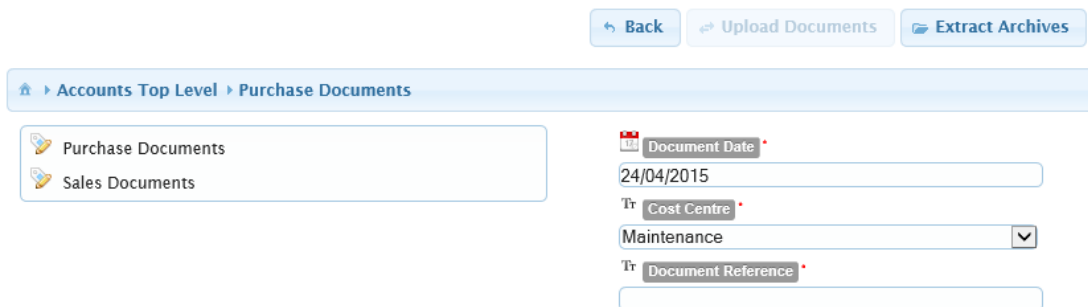
Figure 6.3.1.2 - Category Attributes

NOTE: * next to the attribute name indicates that a value must be entered, the 'Upload Documents' button is disabled until all of these are entered.

The attribute name is taken from the attribute description, you can hold the cursor on the name to display the actual attribute name in a pop-up.

Expand Archives / Don't Expand Archives – if your selection includes one or more zip files, you can specify if you want to upload them as zip files or as the files in the zip file.

Once completed click on '**Upload Documents**'.

Advanced Upload then processes the list of files selected for upload.

When done, the screen returns to a 'New Uploads' button. If you want to do another Advanced Upload, click this button to start again.

6.3.2 APPLY SINGLE DOCUMENT INDEXATION (WORKSPACE)

To apply indexation to a single document you must first find the specific document within the EDRMS and click the "Apply Indexation" button 🖋 that can be found under the Actions against the document or at the top under the actions that can be used in relation to tick boxes.

See section 3.3 Folder Maintenance – Uploading documents

6.3.3 APPLY MULTIPLE DOCUMENT INDEXATION (WORKSPACE)

If the documents that you would like to apply indexation too are not located in the same folder then you must first find each document and add them to the clipboard. From here you use the "Apply Indexation" button on the Clipboard Contents pane.

If all of the documents are located in the same folder then you can simply select all of the documents together by using the checkbox on the left of each document. The "Apply Indexation" button on the Folder Contents pane is then used.

6.3.4 APPLY INDEXATION

Click on the 'Apply indexation' icon 🖋 on a document to display the Category Picker screen. The categories you have permission to apply are displayed. Clicking the "+" will expand a category, showing its child categories; you can apply a parent or a child to a document.

Once a category has been selected, the attributes are displayed. From this screen you can add the metadata to the document or edit existing Meta data already connected.

Then complete the indexation by selecting the appropriate action from the drop down list and then clicking on it.

Figure 6.3.4.1 –Index options

By selecting to move the document using configuration it will use the information set in the Import Configuration on the applied category to relocate the document within the folder structure depending on the metadata set.
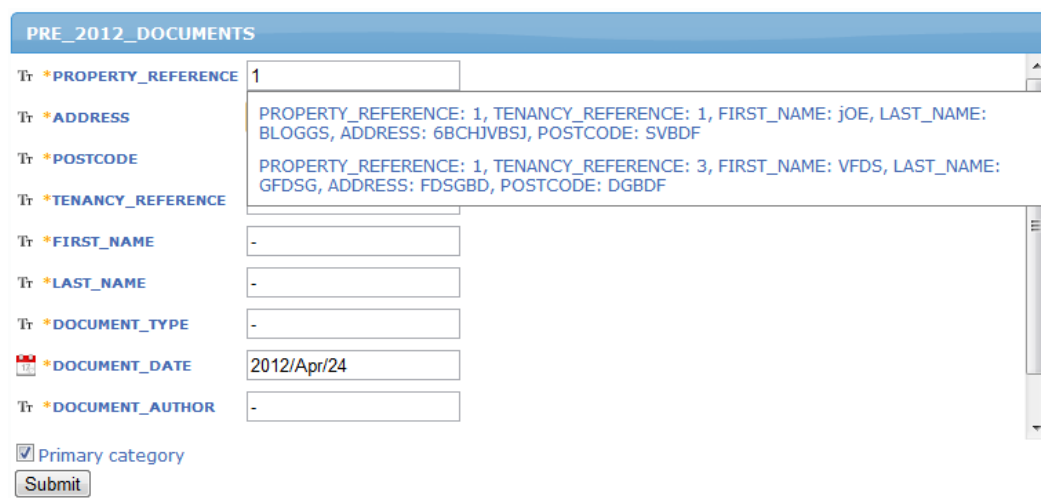
If you choose to rename the document using configuration it will then rename the document to what has been setup in the Import Configuration for that category's Filename Mask.

NOTE: If you do not select to move after upload then it will upload to the currently selected folder

The category is now displayed against the document.

6.4   DATA RETRIEVERS

During indexation, EDRMS is able to automatically populate some fields, reducing the time needed to index, and also reducing the possibility of user errors.

Figure 6.4.1 – Retrieving fields using Data Retriever
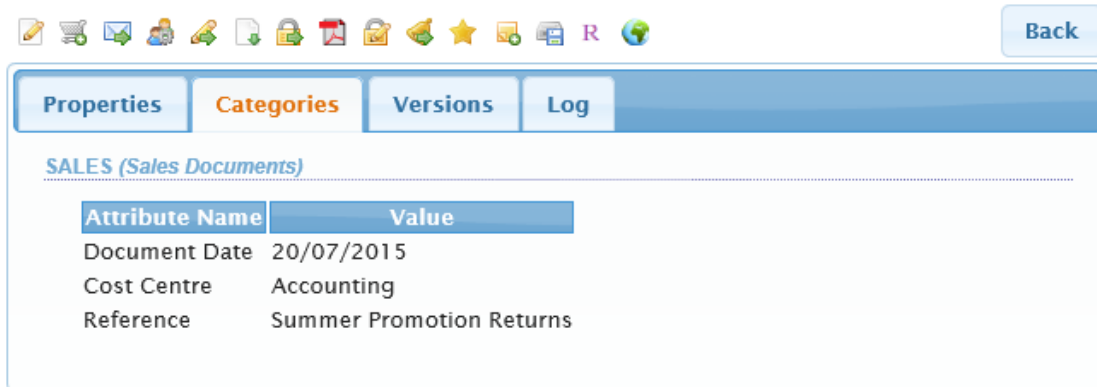
Depending on the fields that have been configured, a connection is made to an external schema, and using the specified fields it is able to search for that data, and extract other related fields in that row to populate the rest of the EDRMS category attributes.

If more than one result is found while running the search you are asked to select the one you want, as seen in *Figure 6.4.1*.

This feature needs to be configured by Netcall or your Site/Technical Admin.

6.5   VIEWING METADATA

If a file has categories assigned to it, this and the associated metadata will be shown on the document details page. To access this information, navigate to the relevant document and click the "Document Details" button to go to the Document Details screen. Once the details screen has opened, click the "Categories" tab to view all applied categories.

Figure 6.5.1 – Document Metadata

6.6   CHANGING CATEGORIES

If you wish to remove a category, losing all of the associated metadata, navigate to the document and click the "Apply Indexation" icon. From here, click on the category tab on the "Indexed Categories" line and then from the "Index, Move & Rename" drop-down list select 'Remove Index', then click on "Remove Link". You will see that the "Indexed Categories" line is now blank.
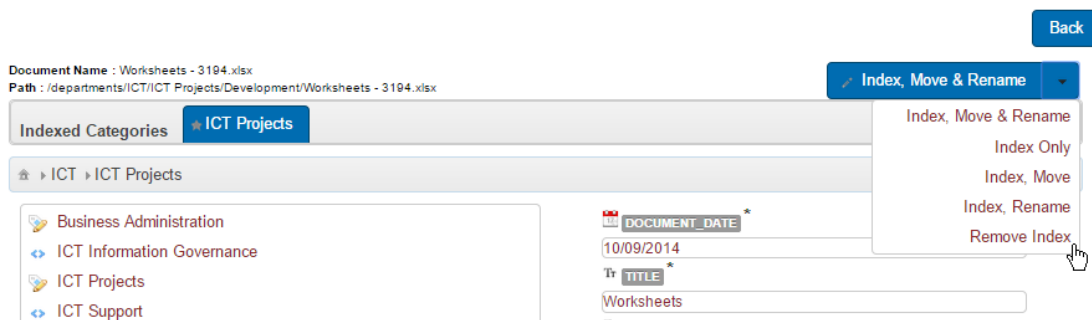
Figure 6.6.1 –Changing Categories

If you wish to edit the metadata for an applied category, you must again navigate to the document and click the "Apply Indexation" icon. Then, once you have selected the category from the "Indexed Categories" line, you can edit each attribute before saving your changes by selecting 'Update' from the drop down list.

7 SEARCHING EDRMS

7.1 OVERVIEW: SEARCHING EDRMS

There are several search utilities that allow you to efficiently search for files and folders on EDRMS. You also have the advantage of being able to search the content of files as well as the file attributes. Oracle Text can filter and extract content from different document formats.

This section describes how to perform searches in EDRMS.

The topics covered in this section are:-

- Keyword Searches
- Category Searches
- Advanced Search (optional module)
- Search Results
- Saved Searches.

Each document returned in search results:-

a)   will match your search criteria,

b)   will be the latest version only,

c)   will be accessible for you to view or edit given your permissions.

7.2   KEYWORD SEARCHES

The EDRMS keyword search lets you perform searches on the two elements of a file; the filename and file content, or run both searches together. Search will search in your current folder and all its sub-folders. To search another folder you must navigate to that folder before searching.
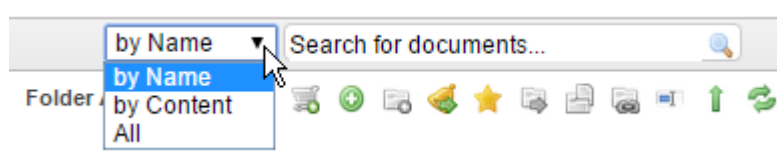
Figure 7.2.1 –Search fields

7.2.1 NAME SEARCHING

The name search is an "is like" search on the name of all documents and folders in the current folder and its subfolders. This search does not search the body of the document or the indexation data. It is not case sensitive.

For example, searching for "SLA REPORT" will return the file "SLA Report Testing 20140619". However, searching for "report AND testing" or "Testing Report" will not. The search is performed on the text that is typed.

If folder display is enabled in the workspace, then name search will result in folders being returned in addition to documents.

7.2.2 CONTENT SEARCHING

The file content search searches for any word or phrase in the body of the file provided the file is text readable (not an image or non-text PDF). You can conduct a content search only if the Oracle Text option is installed on your server which is controlled by your system administrator.

When the Oracle Text option is installed on your server, you have a powerful tool that allows you to search the body of the document rather than just the metadata. For example, you might want to locate files containing the phrase "*marketing analysis"* somewhere in the text. The Oracle text feature supports searching within the following document types

- All Microsoft Office Document formats
- PDF (text based PDF)
- Mark-up Documents (XML, HTML etc.)

Please note: To perform a wildcard search, use the wildcard character "%" in the search field, <u>do not use</u> "*" or "?".

7.2.3 ALL SEARCHING

The 'All' selection runs the 'by Content' search, then the 'by Name' search and merges the results.

7.3   CATEGORY SEARCHES

EDRMS allows you to search on metadata that has been associated with a file. To perform a category search, expand the Search link on the top navigation bar and then click the "Category Search" option.
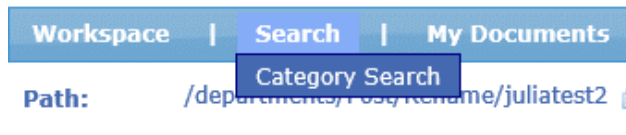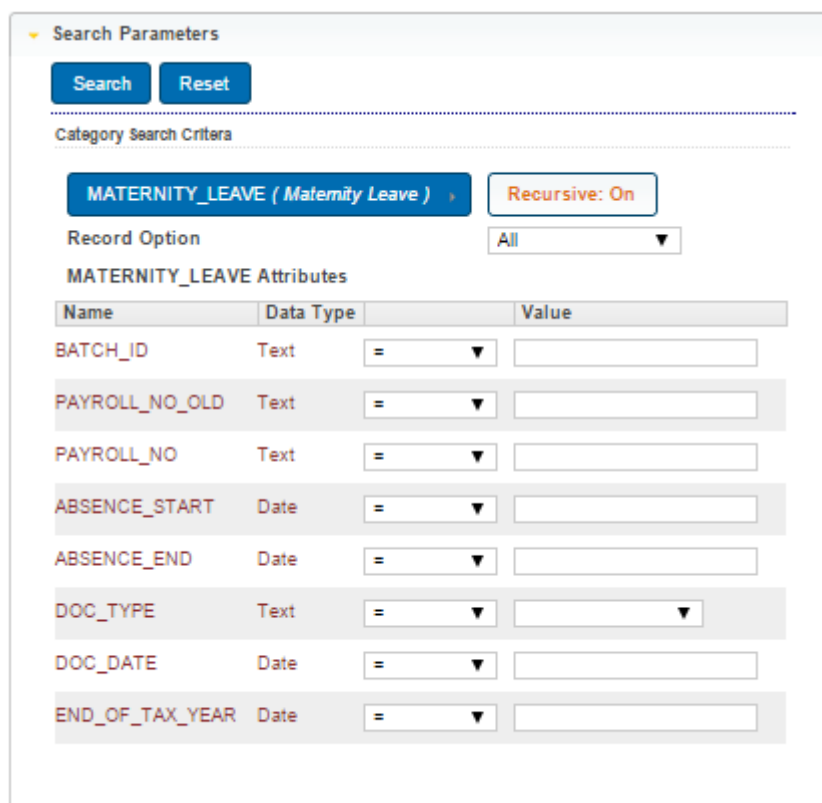
Figure 7.3.1 – Category Search Navigation

On the Category Search page, click on the "Select Category" button to open the Category Picker screen and select the category you require. The category's attributes are displayed. To return to the Category Picker screen, click on the category name.

Figure 7.3.2 – Category Search, category selected

'Recursive: On' means that child categories of the selected category will be searched. Click this to switch it to 'Recursive: Off' if you want to restrict the search to the selected category and exclude its child categories.

'Record Option' allows you to select or exclude documents that have been marked as Records.

The attribute description is shown in the "Name" column, you can hover your cursor on the description to see the actual attribute name.

You are able to choose from a range of operators, as detailed below.

Operator	Description
=	Finds an exact match to the search term, so searching for *John* would return all items with *John*.
Like	Like is a more advanced version of contains, whereby you can specify multiple wildcards. For example you can use %J%SMI% which would return John Smith and Elijah Blacksmith. The wildcards specify anything before the *J*, anything in between the *J* and *SMI*, and anything after the *SMI.*
Contains	Finds attribute values contain the given search criteria, e.g. searching for Dan would return Daniel, Danielle, Danny and so on.
< (less than)	For use with numbers, e.g. search for < 10 to return values from 9 and below.
<= (less than or equal to)	For use with numbers, e.g. search for <= 10 to return values of 10 and below.
> (more than)	For use with numbers, e.g. search for > 10 to return values 11 upwards.
>= (more than or equal to)	For use with numbers, similar to more than, if you search for 10 then 10 and values above will be returned.
Is Null	Returns documents where this attribute is blank or empty.
Is Not Null	Returns documents that have *something* in the specified attribute.
Past '_' days	(Dates only) enter 7 for dates between today and 7 days ago.
between	(Dates only) enter a 'from' and 'to' date range.

Value: enter a value to match with.
If the "Value" field has a drop-down arrow, you may select a value: true or false, or one of a list of pre-defined values, or, if a Data Retriever has been enabled, a list of values retrieved from another database.

When you have entered your search criteria, click the **Search** to run the search.

7.4 ADVANCED SEARCH

Advanced Search is an optional module. When licenced, it can be restricted to Business Admin users or enabled for all users through System Preferences. When enabled, you may select it from the Search menu.
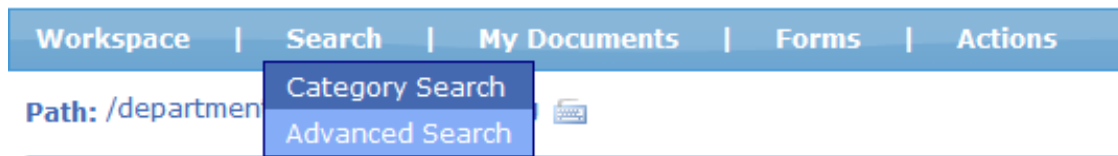
Figure 7.4.1 – Advanced Search on the menu

7.4.1 ADVANCED SEARCH: OPTIONS

Advanced Search is similar to Category Search, in that you can click on 'Select Category' to load the category picker to select a category then make selections based on its attributes, as described above. You also have additional search criteria and options to display extra information regarding these files that you can't view in the regular category search, such as source, creator and dates.
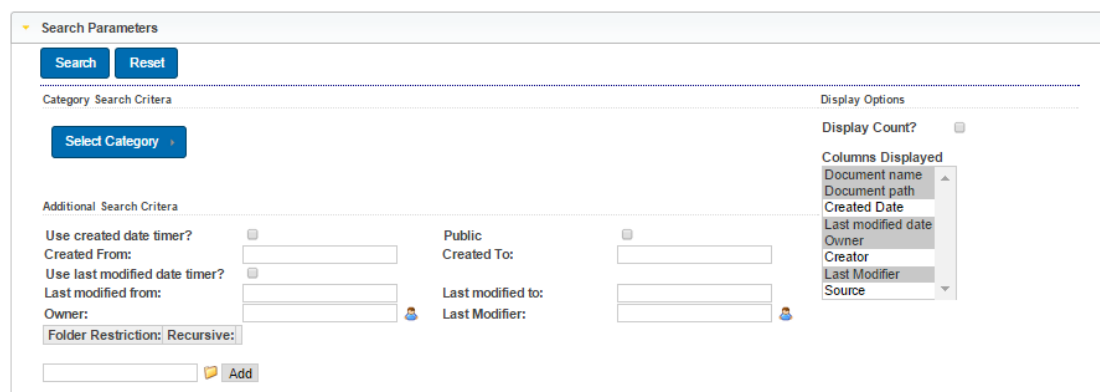
Figure 7.4.1.1 - Advanced Search screen

You may enter Created and Modified 'From' and 'To' dates using calendar pickers. If you click a 'Use timer' checkbox, you can select one of the system timers, e.g. 'every 30 minutes' to select all documents created (or modified) in the last half hour.

The 'Public' checkbox allows you to select only documents that have been made public. Please note this is part of an optional module.

You may select documents based on the Owner or Last Modifier, click on the 👤 button to call up a list of users.

7.4.2 ADVANCED SEARCH: COLUMNS TO DISPLAY

Search Results have a number of columns, made up from the standard data such as name, path, modifier and dates, plus attributes from the category selected, if any. The available columns are listed under "**Columns Displayed**", with the currently selected columns highlighted in grey.
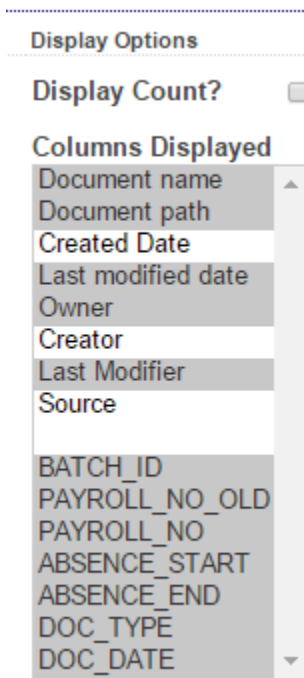
Clicking on an item will select that one and de-select all those already highlighted.

Select a group of items by clicking on the top one, then holding down the shift key as you click on the bottom one.

Add an item to the selection by holding down the Ctrl key as you click on it.

Figure 7.4.2.1 – Display Options

7.4.3 ADVANCED SEARCH: DISPLAYING COUNTS

Advanced Search also provides the facility to display a count of matching documents rather than a list documents.

When you enable "**Display Count**", 'Columns Displayed' changes to 'Group By', with none selected. If you run a search, it will return 1 result, with a count of the documents that match your search criteria.

Figure 7.4.3.1 – Displaying a single count

Results are sorted in descending order by default, largest counts at the top - you can click on the **Count** column header to reverse the sequence.

'Group By' allows you to group results by display items. For example, select Display Count and Created Date for a breakdown of the number of documents created each day. You can group by more than one item, in this example, results are grouped by Created Date, Creator and Last Modifier:

Search Results

Download Results as CSV 📊

Created Date	Creator	Last Modifier	Count ⌄
10/09/2014	serengeti	system	299
09/09/2014	system	system	110
22/11/2013	serengeti	serengeti	25
18/12/2013	serengeti	serengeti	17

Figure 7.4.3.2 – Displaying combined counts

7.4.4 ADVANCED SEARCH: FOLDER RESTRICTIONS

Folder restrictions allow you to perform searches based on the documents within certain directories on the system.

Folder Restriction:	Recursive:
	📁 Add

Figure 7.4.4.1 – Folder Restriction

To add a folder restriction, select the "📁" button and navigate to the folder that you wish to search under. Use the "+" and "-" icons to expand and collapse folders, when you click on a folder it is selected and the folders popup closes. Click on 'Add' to add your selected folder to the restriction. You can repeat this process to add more folders.

Folder Restriction:	Recursive:	
/departments/ICT/Information Governance/Agendas	☑	✖
/departments/ICT/Information Governance/Data Protection	☑	✖
/departments/ICT/Information Governance/Guidance Notes	☑	✖
	📁 Add	

Figure 7.4.4.2 – Added Folder Restrictions

'Recursive' is enabled by default, this means all the sub folders under the folder selected will be searched, disable this to exclude sub-folders from the search.

You can remove any of these folder restrictions by clicking the "X" beside them.

7.4.5 ADVANCED SEARCH: RESULTS AS A CSV FILE

You are able to download the results of the search in CSV format for any further external processing required by clicking the CSV icon as displayed below
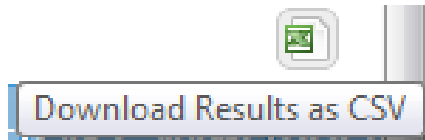
Figure 7.4.5.1 – Download CSV Icon

7.5   SEARCH RESULTS

Once a search has been submitted you are taken to the Search Results page where files that matched the search criteria are displayed. The functionality of this page will differ depending on the type of search performed.
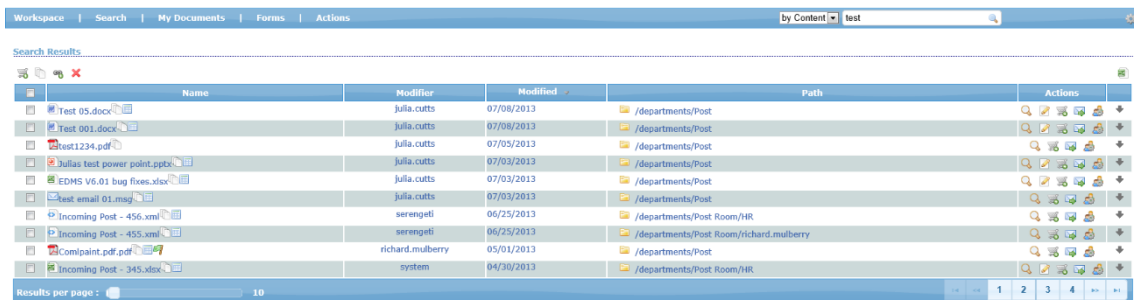
Figure 7.5.1 – Keyword Search Results

This keyword search results screen provides similar functionality to the Folder Contents screen, providing all of the document and folder content icons for you to use. It also shows the last modifier, the date of last modification and the full path to the document. You can open the document by clicking the filename or you can navigate to the folder containing the document by clicking on the file path.
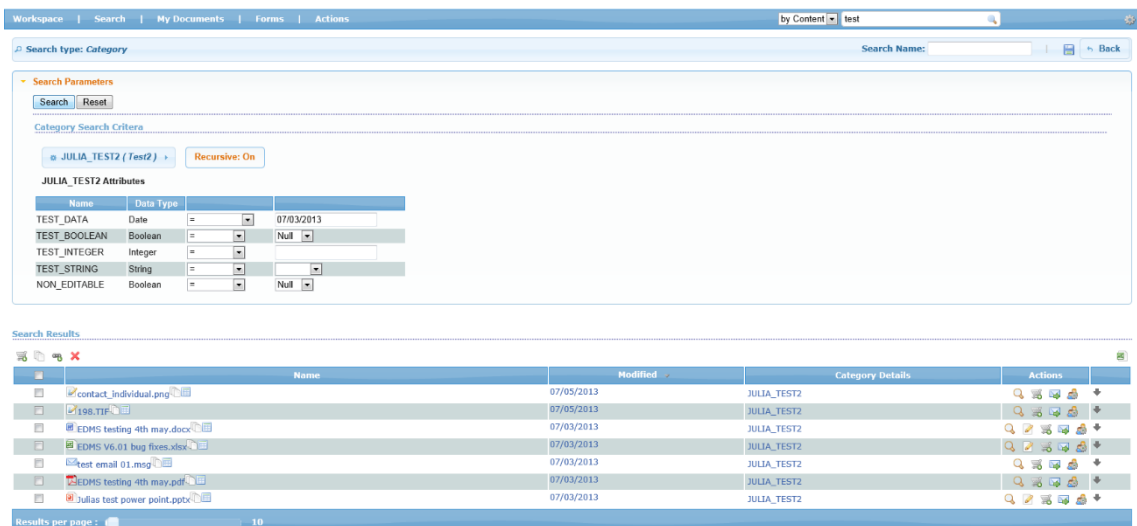
Figure 7.5.2 – Category Search Results

The category search results screen also provides all of the document and folder content icons for you to use, but it also shows you the full category metadata on which the search was performed. You can open the document by clicking the filename. Finally, you can refine the search by changing the original search criteria.

7.6   SAVED SEARCHES

When you have run a Category Search (or Advanced Search if enabled), if you think you may want to run the search with the same criteria again, you can save it. To do this, enter a unique name into the 'Search Name' field and click on the 'Save' icon.

Figure 7.6.1 –Save Search

Once a search is saved it will be listed under the 'Search' menu item. Clicking on it, will rerun the search.
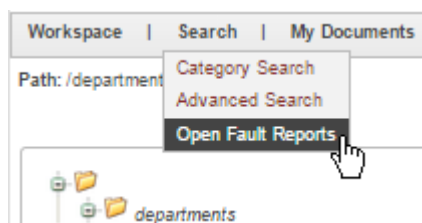
Figure 7.6.2 – Selecting a saved search

If you want to delete a saved search, select it from the menu - you will see a red X for delete has been inserted between the 'Save' icon and the 'Back' button.

8   SENDING DOCUMENTS

8.1   OVERVIEW: SENDING DOCUMENTS

EDRMS allows you to forward files stored within the system to other users and external recipients. The file can be sent as a link to another EDRMS user and can only be seen when they are logged into the system, this method ensures that the document is not unnecessarily duplicated in any way. Alternatively, the document can be sent as an attachment to either internal users or external recipients, such a method will create duplicate copies of the document.

The topics covered in this section include:-

- Sending Single & Multiple Documents
- Sending as Links
- Sending Documents.

8.2   SENDING SINGLE & MULTIPLE DOCUMENTS

8.2.1 SENDING SINGLE DOCUMENTS

To send a single document from the system you must first navigate to the document that you want to send and click the "Send Documents" icon under the Actions column. This will now open the Send Documents window, for further instructions follow the below instructions 8.3 & 8.4 for further instructions.

8.2.2 SENDING MULTIPLE DOCUMENTS

If you would like to send multiple documents that are all located in the same folder then you can simply select them using the checkboxes on the left hand side of each document and click the "Send Documents" icon located on the Folder Contents pane above the documents.

Alternatively you may want to send multiple documents that exist in different folders. To achieve this you must navigate to each document and place them on the clipboard using the "Send to Clipboard" icon under the actions column. Once you have all of the documents to send click the "Send Documents" icon located on the Clipboard pane. This will now open the Send Documents window, for further instructions follow the below instructions 8.3 & 8.4 for further instructions.

8.3 SENDING AS LINKS

To send a document as a link to an internal recipient, navigate to the document and click the "Send Document" icon.

Send Documents

/departments/Serengeti Housing/Plugin Test/Test/Carl/Robin/Carl - Robin - 938.doc   Send   Back

Send as:
◉ Link ○ Attachment

Recipients

User: [_____]   Add   No Recipients

Group: [Finance Staff ▾]   Add

Optional Message

[   ]
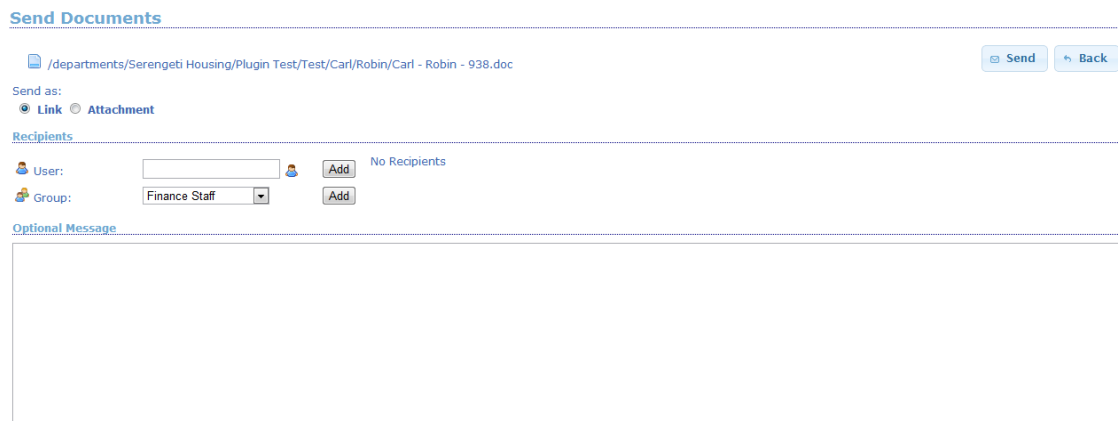
Figure 8.3.1 – Send Document as Link

From the Send Document screen you must select users and/or groups as recipients, type a message, select the "Send as Link" option and click send. If you wish to remove any users or groups from the list, click the "Remove" link beside them.

The message will be sent to the recipients as an internal message and/or email depending on your system preferences as defined by your site and technical administrators. The message and/or email will include a link to retrieve the document from EDRMS and a link to view the document details.

e-intranet Notification Alert: Carl - Robinson - 967.doc   ✕

Received: 25/04/2012 09:04
From: serengeti
To: 👤 serengeti

Please read '/departments/Plugin Test/Test/Carl/Robinson/Carl - Robinson - 967.doc', you can download it or view the details

Message added:
Please review this document.

This message was sent by Serengeti EDMS 6.0.
Copyright 2006-2012 Serengeti Systems Ltd. All Rights Reserved.
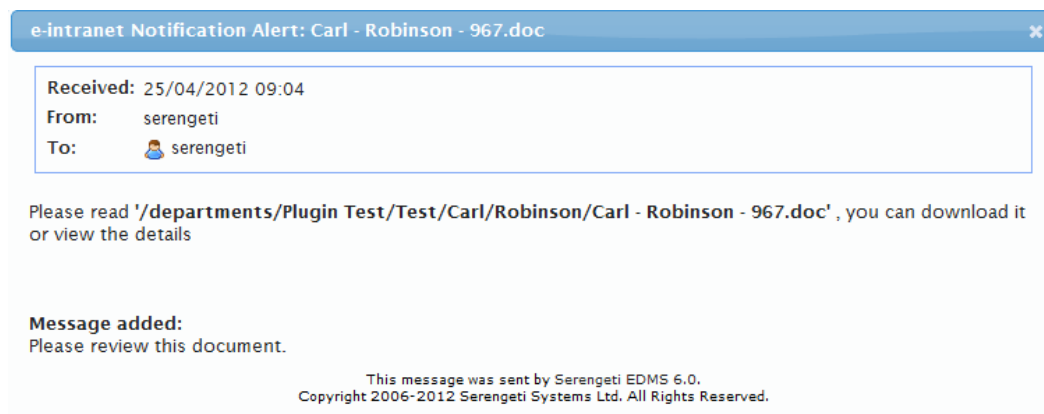
Figure 8.3.2 – Document as Link Message

8.4   SENDING DOCUMENTS

To send a document as an attachment to an internal or external recipient, navigate to the document and click the "Send Document" icon.

Send Documents

/departments/Plugin Test/Test/Carl/Robinson/Carl - Robinson - 967.doc   ✉ Send   ↶ Back

Send as:
○ Link ● Attachment

Recipients

User: [   ] 👤   Add   No Recipients

Group: [Finance Staff ▼]   Add

External Email Addresses: [carl.robinson@serengeti-s]   Add

Optional Message

    Please review this document.

Figure 8.4.1 – Send Document as Link

From the Send Document screen you must select users and/or groups as recipients, type a message, select the "Send as Attachment" option. You can also specify external email addresses, clicking "Add" to confirm them before clicking "send". If you wish to remove any users, groups or external addresses from the list, click the "Remove" link ✖ beside them.

The message will be sent to the internal recipients as an internal message and/or email depending on your system preferences as defined by your site and technical administrators. External recipients will receive an email that includes the document as an attachment.
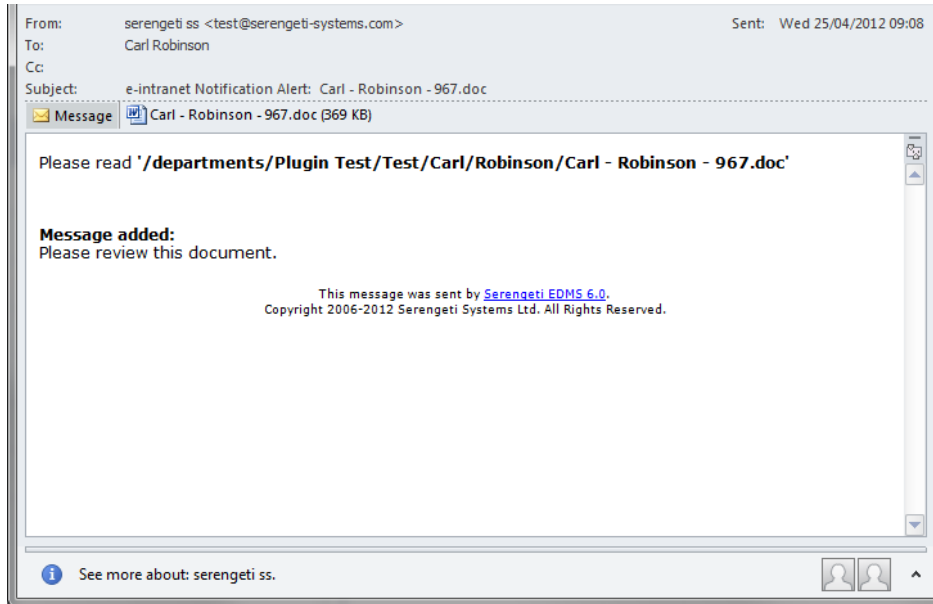
Figure 8.4.2 –Email Notification

9 SUBSCRIPTION

9.1 OVERVIEW: SUBSCRIPTION

This section describes the EDRMS subscription facility. Subscribing allows you to keep informed of changes to files via email or internal message notifications over the file life cycle.

The topics covered in this section are:-

- Subscribing to a File or Folder
- Receiving Subscription Notifications.

9.2 SUBSCRIBING TO A FILE OR FOLDER

EDRMS subscription system allows you to keep track of any changes made to a document during its life-span. When other colleagues are working on a document it is helpful for all other interested users to be told whether a change has been made, rather than having to check the status of a document manually. This is done by email notifications.

To subscribe to a file or folder, navigate to it and click the "Modify Subscription" icon to go to the Modify Subscription page. Click on "Create Subscription" to subscribe to the document or "Delete Subscription" to remove your subscription.
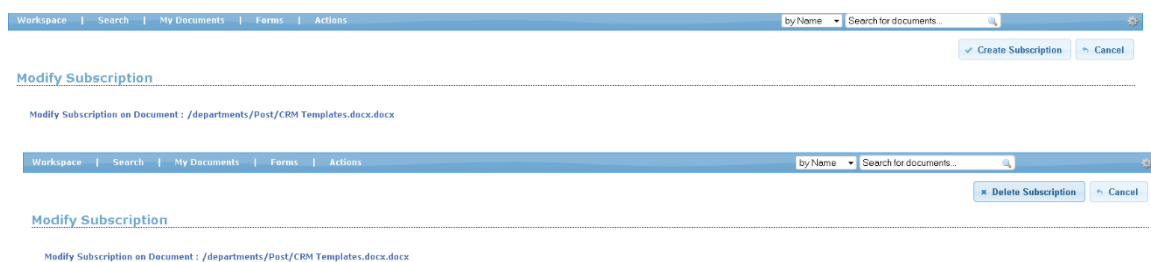
Figure 9.2.1 –Suscription to a document

9.3 RECEIVING SUBSCRIPTION NOTIFICATIONS

If you are subscribed to a file or folder, you will receive notifications whenever the file or folder is altered. These notifications could be in the form of emails sent to your default email application, internal messages sent to your EDRMS inbox, or both. This will depend on the system preferences set by your site and technical administrators.

Figure 9.3.1 – Notification Email

The notification shows the full document path and provides you with links to download the document or to view the document details.

10 FILE ASSOCIATION

10.1 OVERVIEW: FILE ASSOCIATION

File association is used to associate related files. For example, maps can be associated with reports; agendas can be associated with minutes.

Associations make the user aware that the current document that they are working on also has other documents that are related to it in some form, beside the documents file name will be a chain symbol, indicating that it has associated files, you can view the associations by viewing the documents details, and selecting the associations tab.
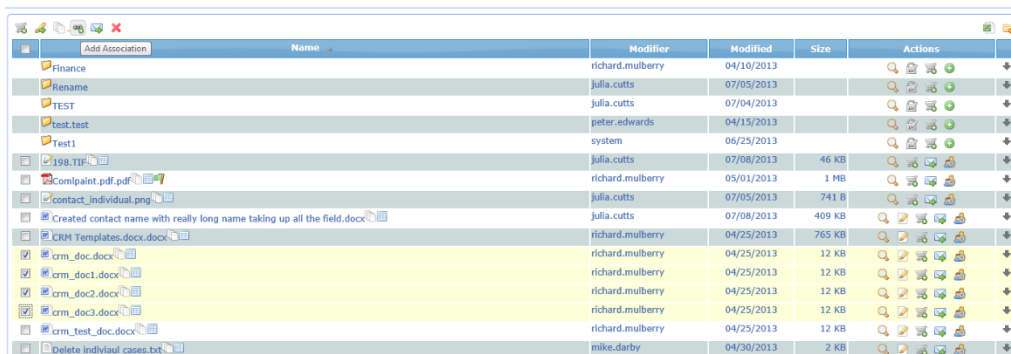
Associations are made using links and can be made across separate directories within EDRMS. File association allows you to view all related documents.

The topics covered in this section are:-

- Associating Files

- Viewing File Associations

- Deleting File Associations

10.2 ASSOCIATING FILES

If the documents you wish to associate with one another are in the same folder then you can use the checkboxes on the left hand side of each documents and click the "Add Association" icon at the top of the page.

Figure 10.2.1 Selecting documents for association

You will receive a confirmation message and all of the associated documents will now have the icon next to them. Note you may not add an association to a document that is marked as a Record. Hovering over the document will display a list of the associated documents.
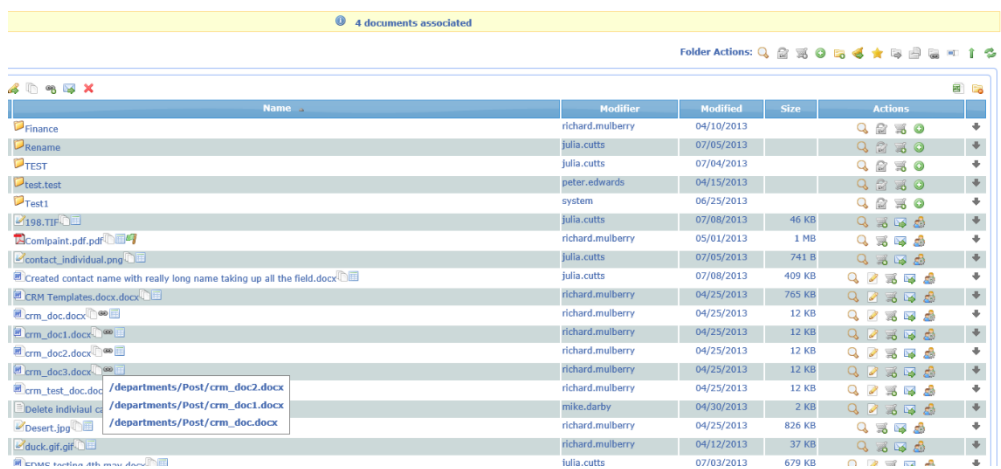
Figure 10.2.1 – Association Target Section (Multiple Files)

If however the documents you wish to associate are in different folders, then you will need to move the documents to the clipboard using 'send to clipboard' .

Once all the required documents are on the clipboard then they can be associated using the clipboard's 'Associate' function.
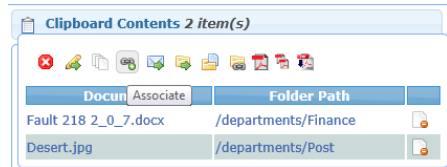
Figure 10.2.2 –Files in clipboard, ready for Association

10.3 VIEWING FILE ASSOCIATIONS

Documents that have associations will have the chain symbol beside their file name, indicating that they have one or more associations.

To view the associated documents, you will need to select the document details action, which is the magnifying glass icon; from here you will need to select the "associations" tab to view the associated files.

From here you are able to click the filename to be taken directly to that file.
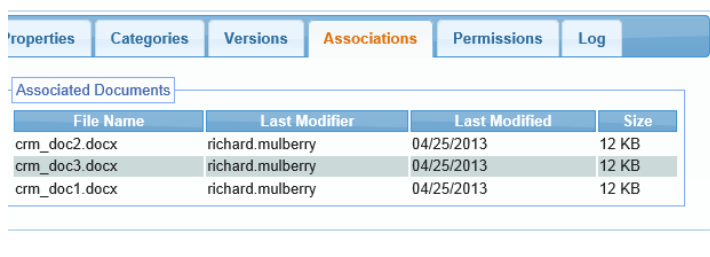
Figure 10.3.2 – Associated Documents

10.4 DELETING FILE ASSOCIATIONS

If you have associated documents that are no longer relevant, you can remove the associations. Also, if you want to delete a document that has an association, you need to remove the association first. To do this you must navigate to either of the document and click the "Manage Associations" icon to go to the Manage Associations screen.

Figure 10.4.1 – Documents

This screen will show you the filename and full path of each associated document. Click the "Unlink" icon to delete the association. You are able to delete individual associations, or delete them all by clicking each "unlink" icon.
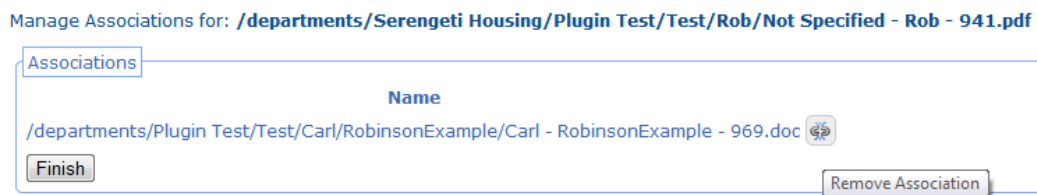
Figure 10.4.2 – Removing Associations

11 REVIEW DATE

11.1 OVERVIEW: REVIEW DATE

This section describes the review date features of EDRMS and shows how to manipulate review dates on files and folders.

The topics covered in this section are:-

- Review Dates Explained
- Applying Review Dates
- Changing Review Dates
- Removing Review Dates
- Review Dates Notifications.

11.2 REVIEW DATES EXPLAINED

In a real time document management environment, many documents may arrive in advance which must be reviewed at a later date. Perhaps the person who normally deals with them is very busy at that moment and decides to look at the document later.

In these examples it would be very difficult to keep track of the documents without an efficient document management system. EDRMS provides a solution for this problem with review date functionality.

Review dates can be set up on documents and folders and gives them a special attribute. You can, of course, change the review date at any time provided you have the appropriate permissions and as long as the document has not been declared as a record. It is also possible to add a reviewer, so that a user or a group can be selected to review the document rather than the document creator.

EDRMS notifies you if a document is due for review by sending a message or e-mail to the document creator or chosen reviewer in advance. The time of day that notification messages/emails are sent is defined by your site and technical administrators.

11.3 APPLYING REVIEW DATES

Review dates can be applied to files in two ways. The first is when uploading a file - use the calendar date picker to select a date and click "Save".
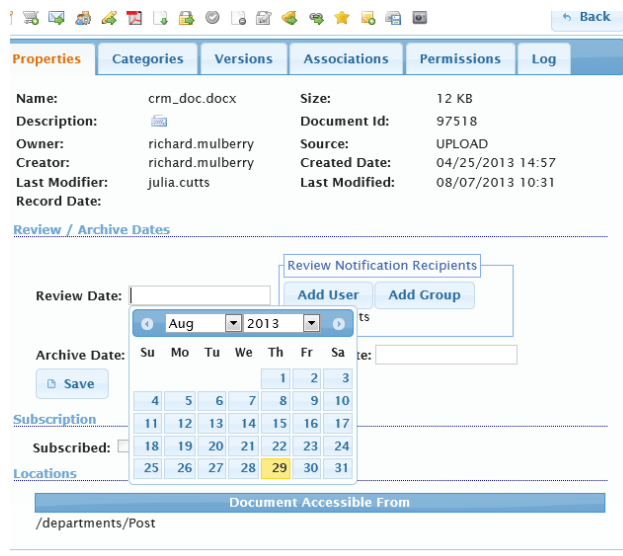
Figure 11.3.1 – Setting Review Date On Upload

The second method of setting a review date is after upload. Navigate to the document and select the "Document Details" action to view document details. Review details are shown on the Properties tab.

Figure 11.3.2 – Setting Review Date After Upload

Set a review date using the calendar date picker.

By default, review notifications will be sent to the creator of the document, and the last modifier if this is different. If you add one or more reviewers here, then notifications will be sent to these reviewers instead.

You may add Review Notification Recipients by User or by User Group. See *Figure 11.3.3 – Select Review Notification Recipients.*
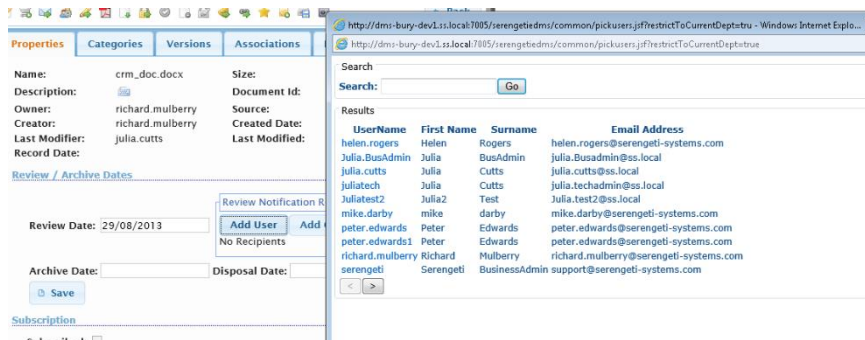
Figure 11.3.3 – Select Review Notification Recipients

Click on the Add User button to call up the user picker. Searching is supported, it is not case sensitive and searches all four columns. Clicking Go with a blank search term will list all users. Click on a username link to add the user to the Review Notification Recipients.

Click on the Add Group button to call up the Group picker; again, searching is supported. Click on a Group Name link to add the user to the Review Notification Recipients.

Each selected user and group is listed under Review Notification Recipients with a red X that allows you to remove them.

Click "Save" to confirm.

11.4 CHANGING REVIEW DATES

To change a Review date or the Reviewer Notification Recipients, navigate to the document and select the "Document Details" action to view document details. Review details are shown on the Properties tab. Set a new review date using the calendar date picker. Change the Review Notification Recipients as required. Click "Save" to confirm. Note that review date and notification recipients cannot be modified if the document has been declared as a record.

11.5 REMOVING REVIEW DATES

To remove a review date, navigate to the document and select the "Document Details" action to view document details. Review details are shown on the Properties tab. Delete the date from the Review Date field. Change the Review Notification Recipients as required. Click "Save" to confirm. Note that review date and notification recipients cannot be modified if the document has been declared as a record.

11.6 REVIEW DATE NOTIFICATIONS

EDRMS notifies the owner or the reviewers of a file when the review date is reached, by sending them a message or email, depending on system preferences. The recipient can then choose to ignore the notification and let the document review date pass, or the document review date can be modified.
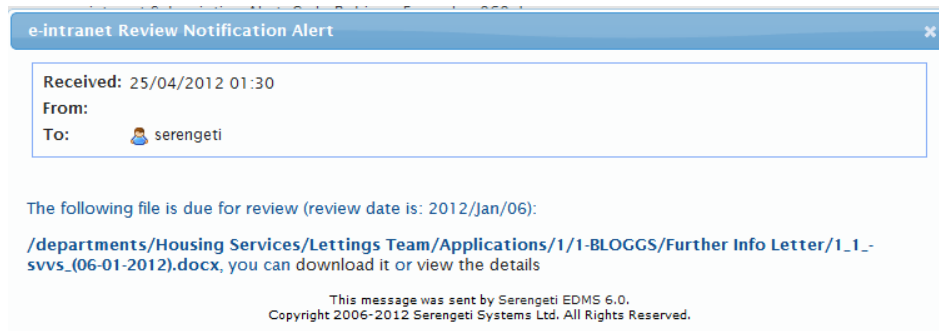
Figure 11.6.1 – Notification Message

The notification shows the document name and folder path and includes links for you to download it or view the document details.

Depending on the parameters set by the System Administrator, the notification email will be sent at regular periods until the review is completed.
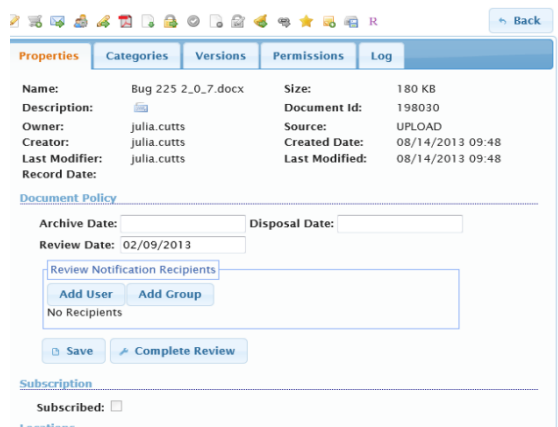
Figure 11.6.2 – Complete Review

Clicking on this field will delete the review date and no further notification emails will be received.

12 ARCHIVE DATE

12.1 OVERVIEW: ARCHIVE DATE

This chapter describes the file archival features of EDRMS. It shows you how to manipulate archive dates on files and folders.

The topics covered in this section are:

- Archive Dates Explained
- Applying Archive Dates
- Changing Archive Dates
- Removing Archive Dates.

These are all manual tasks, it is likely that your Site Administrator will set up automatic disposal and archiving so that manual intervention is not required.

12.2 WHAT ARE ARCHIVE & DISPOSAL DATES

Archival dates give documents a fixed life span. Not all documents have a long-term value and can therefore be deleted from the EDRMS repository automatically once they have reached their archive date.

Once applied to a file or folder, you can change the archive date at any time, provided you have the appropriate permissions, and as long as the document is not declared as a record.

Once the archival date of a file has been reached, it will be moved to the Archived Items folder. This folder can only be access by your site administrator. Once archived, a document can be permanently deleted or restored to its original location by the Site Administrator.

Once the disposal date is reached then the document will be permanently deleted.

The Archive & Disposal dates cannot be applied/changed once a document has been 'Declared as a record'.

12.3 APPLYING ARCHIVE & DISPOSAL DATES

Archive dates can be applied to files in two ways. The first is when uploading a file by manually typing an archive date or selecting it using the provided date picker. Click "Save" to confirm the date. See *Figure 12.3.1 – Setting Archive Date On Upload*
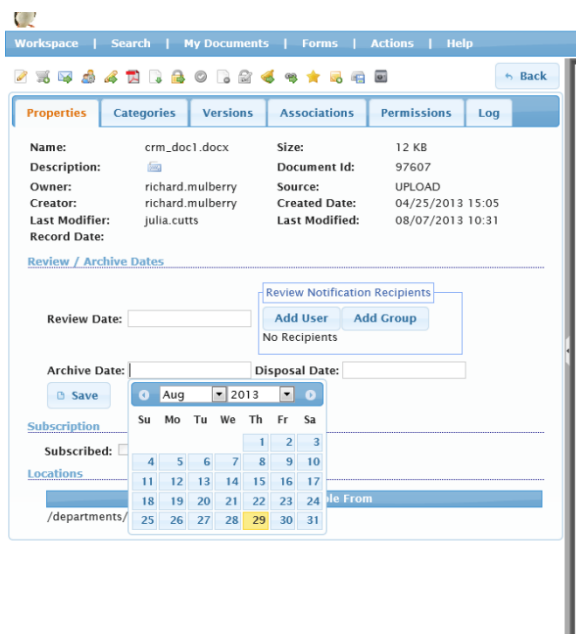
Figure 12.3.1 – Setting Archive Date On Upload

The second method of setting an archive date is after upload at which point you can also set the disposal date.

To do this you must navigate to the document and click the "Document Details" icon to view the document details. From here you can select the Document Properties tab

Figure 12.3.2 – Setting Archive & Disposal Date After Upload

Manually type in an archive/disposal date or select it using the provided date picker, Click "Save" to confirm the date.

12.4 CHANGING ARCHIVE & DISPOSAL DATES

To change an archive/disposal date, you must navigate to the document and click the "Document Details" icon to view the document details. From here you can select the Document Properties tab and either manually type in the new archive/disposal date or select it using the provided date picker. Click "Save" to confirm the date.

12.5 REMOVING ARCHIVE & DISPOSAL DATES

To remove an archive date, you must navigate to the document and click the "Document Details" icon to view the document details. From here you can select the Document Properties tab and then delete the date from the Archive Date or Disposal Date field before saving the amendment.

13 RECENT DOCUMENTS

13.1 OVERVIEW: RECENT DOCUMENTS

EDRMS provides the facility to record your most recent documents for easy retrieval.

The topic covered in this section is:-

- Using Recent Documents

13.2 USING RECENT DOCUMENTS

Every document you visit, either by opening it or viewing the document details, are stored in your recent documents list. This list can be accessed by holding the mouse cursor over "Recent Documents" in your navigation bar.

Figure 13.2.1 – Recent Documents

Clicking one of the listed documents will take you to the Document Details screen where you can view a preview of the document as well as perform any of the many document functions.

The count of documents that reside in your list of recent documents is configured by either the system or your departmental technical administrator. As the list of documents reaches the limit the least recently viewed documents will be removed from the list and replaced.

14 FAVOURITES

14.1 OVERVIEW: FAVOURITES

EDRMS provides the facility to add documents and folders to a favourites list for easy retrieval.

The topic covered in this section is: Using Favourites.

14.2 USING FAVOURITES

There are some documents and folders in EDRMS that you regularly visit. To do this you may have to navigate through several folder levels. Alternatively, you may visit a document or folder and wish to bookmark it to return later. This can be achieved by added the document or folder to your favourites.
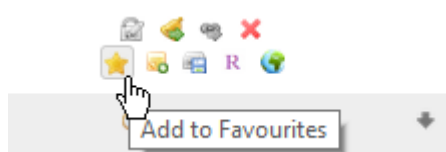
To do this for a document, simply click the "Add To Favourites" icon next to the relevant document. For folders, click the "Add To Favourites" icon for the folder.
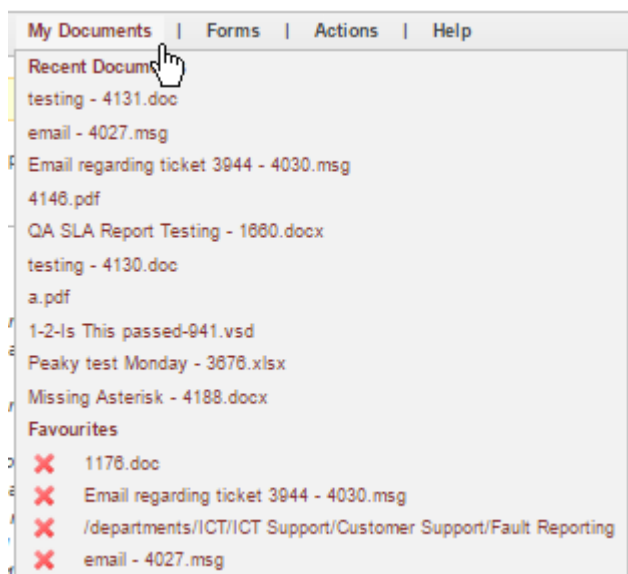
Favourites are listed under **My Documents** after the 10 Recent Documents.
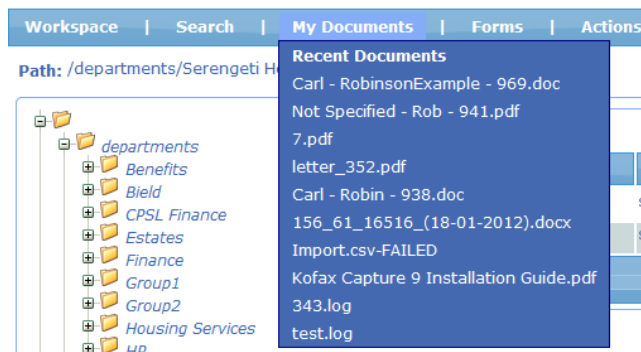
Clicking one of the listed documents will take you to the Document Details screen where you can view a preview of the document as well as perform any of the many document functions.

Clicking a listed folder will take you to that folder location.

Figure 14.2.1 – Favourites Documents

15 WORKFLOW APPROVAL

15.1 OVERVIEW: WORKFLOW APPROVAL

A workflow consists of a collection of activities that support a specific business process. These activities can be applied to documents in EDRMS.

After configuring a workflow, you can apply this to a document. Depending on the configuration of that workflow, the applied document(s) will have notifications sent to the first "Approver". This Approver will view the document, and can decide to Accept or Reject the document. If the document is accepted it will be sent on to the next approver, and continue until all approvers have completed. If at any stage the approver decides to reject the document, it will be moved to the Rejected folder, and the approvers notified.

The topics covered in this section include:-

- EDRMS Workflow
- Applying Workflows
- Workflow Details
- Workflow Approval/Rejection

15.2 EDRMS WORKFLOWS

EDRMS workflow is a simple workflow system offering the user the chance to upload documents and apply a workflow process to it. The user who starts the workflow is called the 'initiator'. An example of a workflow process is an approval system that requires a document, uploaded into the EDRMS repository, to go through a sequence of approvers. Approvers are notified that a document requires their approval by internal message or email.

The following diagram shows how this approval scenario can be modelled using EDRMS workflow. Once a document is uploaded, notifications are sent to the approvers, one after the other.
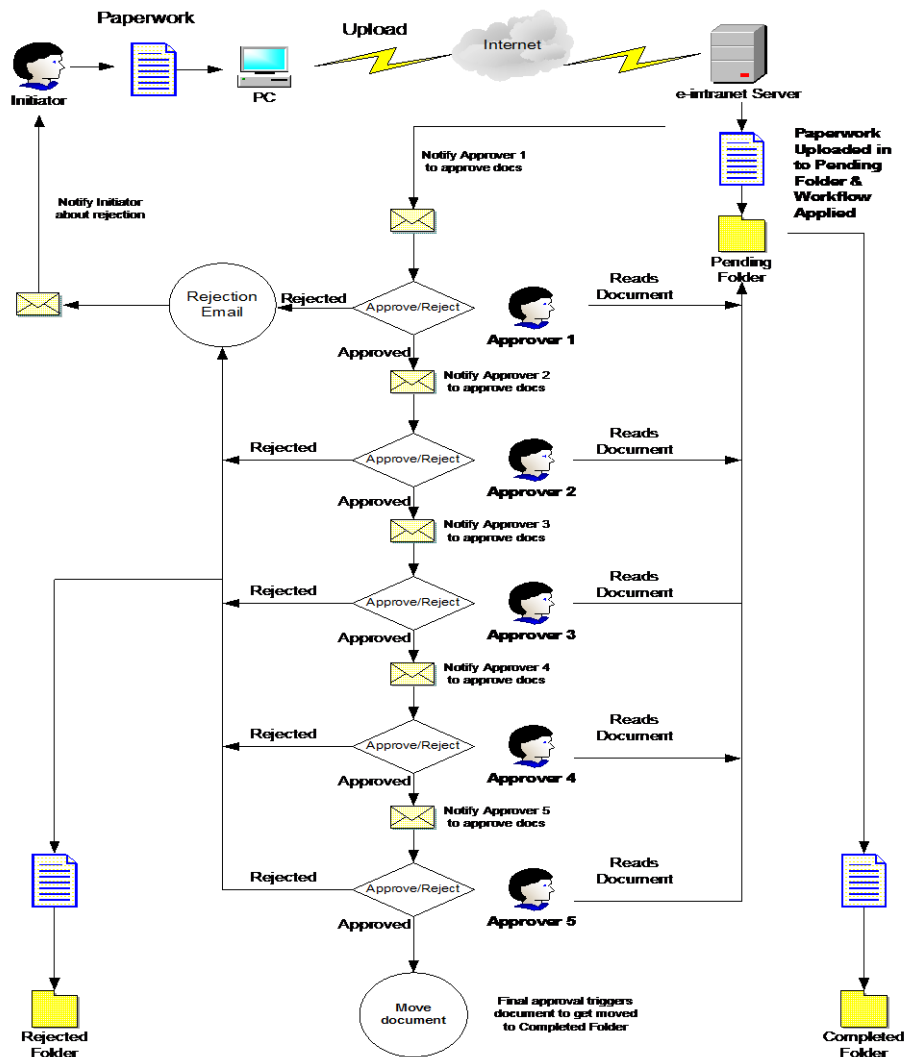
Figure 15.2.1 – Example Workflow Process

This specific example shows that each approver receives an email in turn once the previous approver has approved the document. If the document is rejected at any time, the document is moved to a Rejected folder and the initiator is emailed of its failure to complete the workflow process. If the document passes each approval step then, on completion, the document is moved to a Completed folder. The above workflow model would be created by your site or technical administrator.

15.3 APPLYING WORKFLOWS

You can apply a workflow to a document during upload or after upload. To apply during upload, upload a document in the usual way and click the "Initiate Workflow" icon on the Upload Completed screen.

Upload Summary

📄 /departments/Post/Indexer In-Tray/1.html *(44 KB)* 🔍

Actions   `Initiate Workflow`

Review / Archive Dates

| Review Date: | |
| Archive Date: | |

`Save`

Figure 15.3.1 –Applying workflow

15.4 WORKFLOW DETAILS

Once the Workflow has been applied to a document, you can check its progress by clicking on the "Document Details" icon to go the Document Details window. From here, click the Workflow tab to view the workflow details.
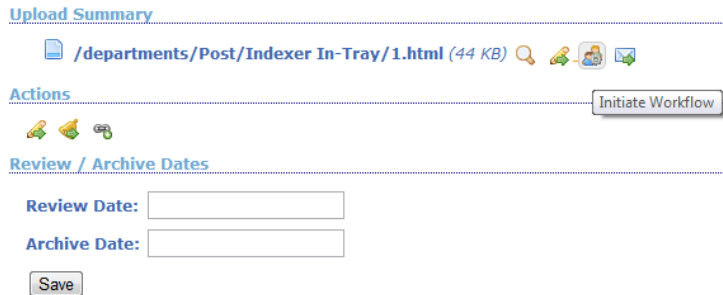
15.5 WORKFLOW APPROVAL/REJECTION

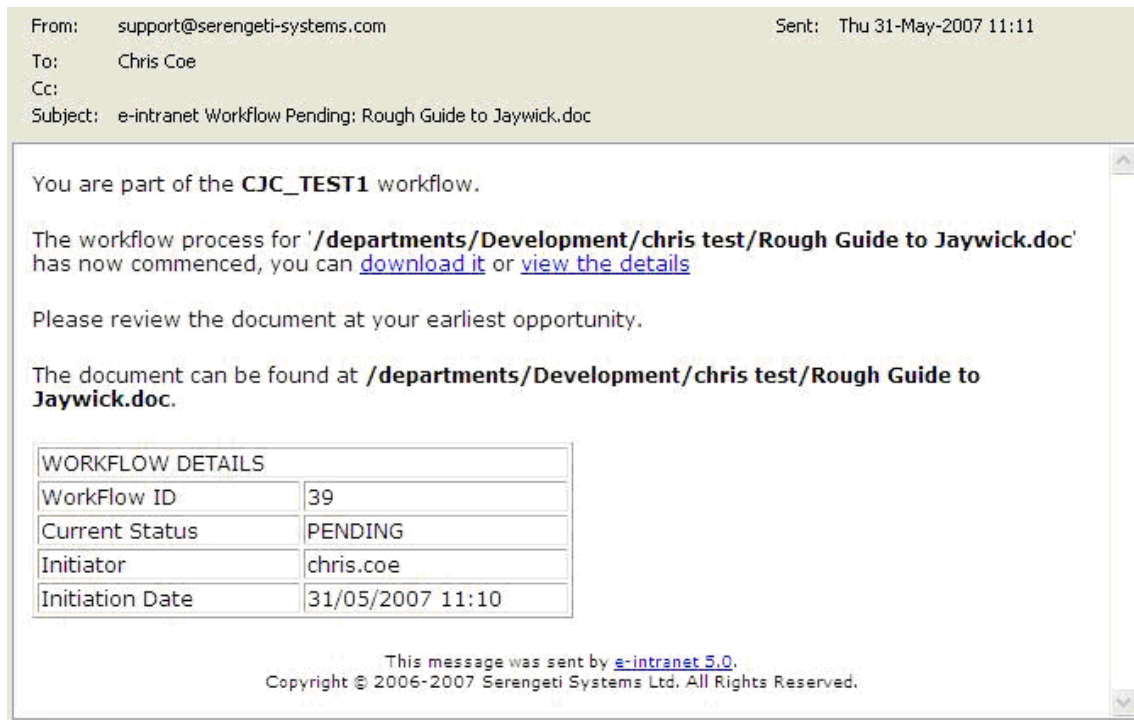Once a workflow has been applied, a message and/or email will be sent to the first approver(s).

From:	support@serengeti-systems.com	Sent: Thu 31-May-2007 11:11
To:	Chris Coe	
Cc:		
Subject:	e-intranet Workflow Pending: Rough Guide to Jaywick.doc	

You are part of the **CJC_TEST1** workflow.

The workflow process for '**/departments/Development/chris test/Rough Guide to Jaywick.doc**' has now commenced, you can download it or view the details

Please review the document at your earliest opportunity.

The document can be found at **/departments/Development/chris test/Rough Guide to Jaywick.doc**.

WORKFLOW DETAILS	
WorkFlow ID	39
Current Status	PENDING
Initiator	chris.coe
Initiation Date	31/05/2007 11:10

This message was sent by e-intranet 5.0.
Copyright © 2006-2007 Serengeti Systems Ltd. All Rights Reserved.

Figure 15.5.1 – Workflow Approval Notification

This notification confirms the name of the workflow; the full path of the document involved, provides links to download the document or view the document details, and provides details about the specific workflow application.

To process the workflow, you can either proceed to the document details screen or click the Workflow Approval icon, or you can navigate to your inbox and click the Workflow Approval icon for the relevant document. Whatever method you choose, you will be taken to the Workflow Approval screen.

From here you must enter your comments, select either Approved or Rejected and click "Go" to complete the workflow stage. If the workflow has multiple stages, the next approver will receive an email and/or message notification. Once all approvers have approved or rejected the document, the document will be moved or copied to the relevant approval or rejection folder.
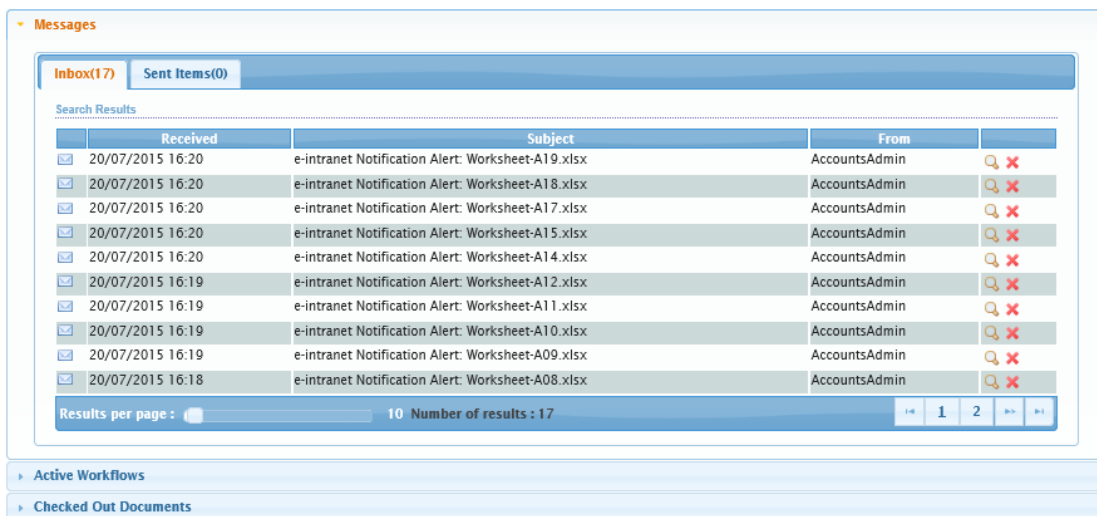
16 INBOX

16.1 OVERVIEW: INBOX

The Inbox is a feature that allows you to keep track of EDRMS messages without having to have access to your email account. Provided your site or technical administrator has enabled the related functionality, EDRMS will send you messages as well as/in place of emails for actions such as file or folder subscription, archive, review, workflow and when documents have been sent to you.

The topic covered in this section is: Accessing Your Inbox.

16.2 ACCESSING YOUR INBOX

To access your inbox, click the "Inbox" link on the navigation bar.

Figure 16.2.1 - Inbox

The top section of the inbox shows your received and sent messages. You can open a message by clicking the "View Message" icon or delete it using "Delete Message". Standard pagination is provided, allowing you to move from one page to another and change the number of items on each page.

The centre section shows a list of all workflows, including a filter selection based on workflow stage (e.g. All / Open / Require Approval / Completed). To view details, click the "Document Details" icon. To go to the workflow approval screen, click the "Workflow Approval" icon. Workflows are covered in greater detail in section 11, Workflow Approval.

The final section of your inbox contains a list of documents you have currently checked out. From this screen you can view the document details, check the document in and cancel the checkout. This is covered in greater detail in section 5, Version Control.

17 ADVANCED VIEWER

17.1 OVERVIEW: VIEWER

EDRMS comes with three options for viewing files. You can have "None", which will open files in your machines native viewer, such as Adobe Acrobat reader for PDFs, MS Paint for Images and so on.

"Advanced Viewer" allows for annotation and redaction of Images and PDF documents, along with various tools such as rotation, inverting of colours etc.

Lastly, you can select "Advanced Viewer with Measurements", which is similar to the standard "Advanced Viewer", but includes measurement tools to allow for measurement of plans for buildings etc.

You will need to have the correct license file to use Advanced Viewer options, consult your Site Admin about this feature.

17.2 INTRODUCTION

The Advanced Viewer enables you to view images from within the EDRMS system and to perform various annotations on these documents. Currently, the viewer supports the following image formats:

TIFF

JPEG

PNG

BMP.

The viewer can be displayed alongside the document details for reference, or it can be displayed in full screen by clicking the filename from within the document details pane, or from the "My Workspace" area.
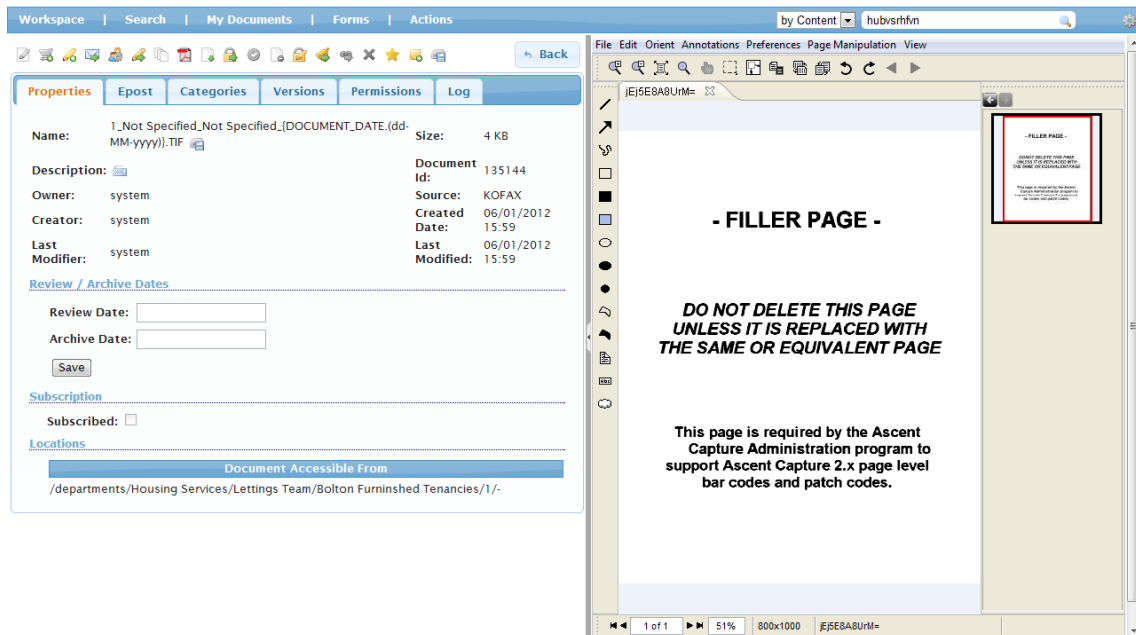
Figure 17.2.1 – Document Details and Viewer

You are able to annotate the document, covering sensitive fields or adding notes for example, when you are finished you can save these changes by selecting "Send Document with Annotations" from the File menu. This will save the document as a new version

17.3 GETTING STARTED: THE MENU SYSTEM

The Advanced Viewer has a Menu system similar to that of most Windows Applications, with a series of drop down menus along the top of the window providing various functions

Figure 17.3.1 – Menu Bar

17.4 MULTIPLE PAGES AND THUMBNAILS

When viewing documents that have more than one page, each page is displayed as a thumbnail along the right side of the viewer. The thumbnail with the red square indicates which page you are currently viewing.
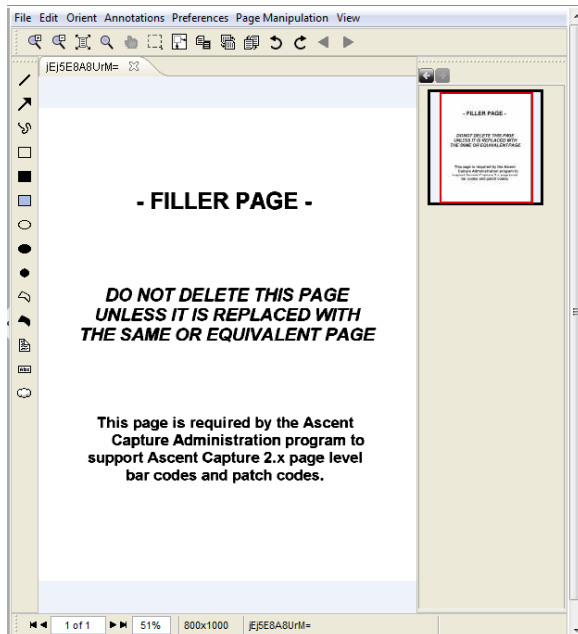

Figure 17.4.1 – Advanced Viewer

You can move between the pages by clicking on the desired thumbnail, or by using the arrows along the horizontal toolbar.

Figure 17.4.2 – Page Navigation Buttons

17.5 THE HORIZONTAL TOOLBAR

The horizontal toolbar provides options for viewing the document itself, such as zooming, rotation, and navigating through pages, if the document has more than one page.

You are able to zoom into the document for finer detailing, this can be done by clicking the zoom in and out buttons located on the horizontal toolbar, alternatively, you can double click on the image thumbnail to zoom in.

Figure 17.5.1 – Page Navigation Buttons

The third icon along in the display above will reset the zoom, or fit the document to the current window. The fourth icon will enable you to drag and create a rectangle; this will then be converted into a magnifying glass which you can use to hover over areas in the document to view in better detail, you can adjust the size of the magnifying glass using the same method you would resize other objects, by clicking and dragging one of the edges.
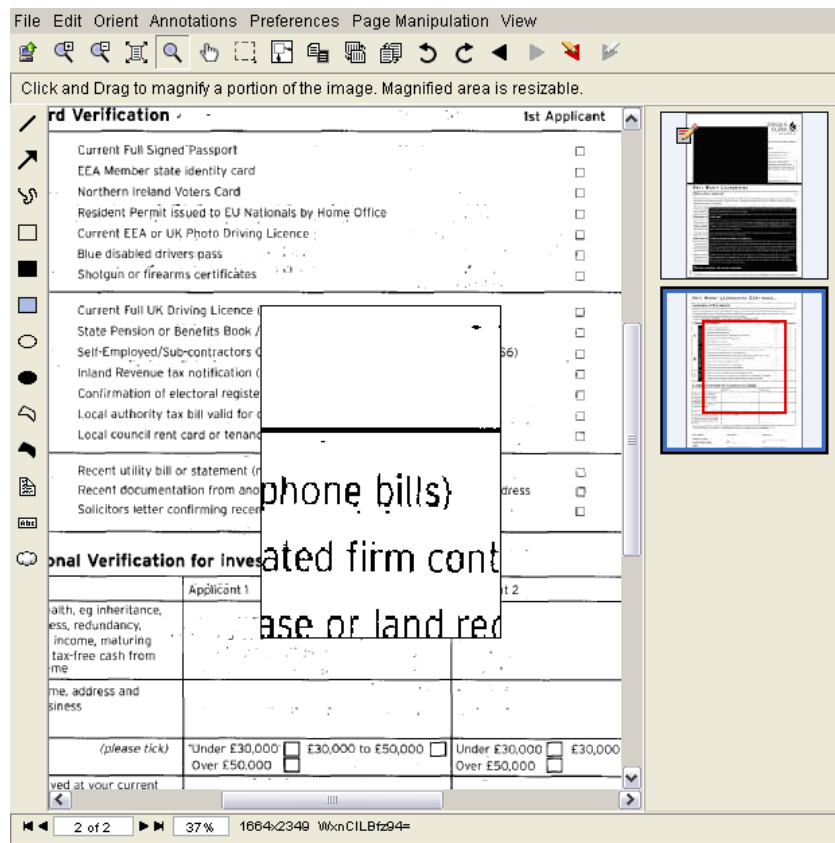

Figure 17.5.2 – Zoom

 Pan – When zoomed in, use this tool to drag around the document, moving the viewing area.

 Select Area – Select an area, you can then Cut, Copy and Crop this area.

 Zoom Rubber Band – Use this tool to draw a box, you will then zoom into this area.

Invert Colour – Invert the colours of the document; select again to revert back to the original colours.

Flip Horizontal – Flip the document horizontally.

Flip Vertical – Flip the document vertically.

Rotate Counter Clockwise – Rotate the document counter clockwise by 90 degrees.

Rotate Clockwise – Rotate the document clockwise by 90 degrees.

Previous Page – Go to the previous page of the document.

Next Page – Go to the next page of the document.

17.6 VERTICAL TOOLBAR

The vertical toolbar provides annotation tools to be used on the document, such as adding text, creating boxes and so on
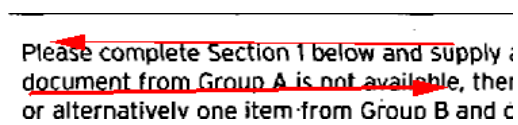
Figure 17.6.1 – Vertical Toolbar

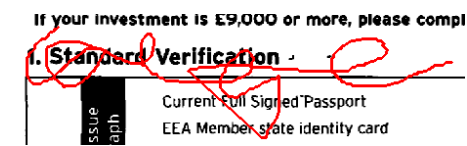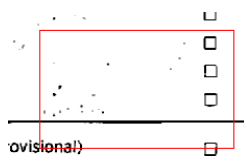Going from the top icon to the bottom, the tools are as follows:

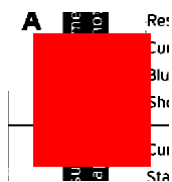Line Tool – Used to draw lines on the document

Arrow Tool – Used to draw arrows on the document, or to point to certain areas of the document
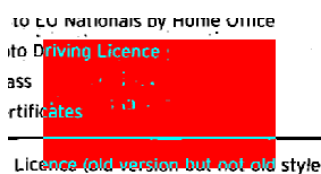

Freehand – Used to draw free hand lines on the document

Rectangle – Click and drag to draw rectangles on the document

Filled Rectangle – Same as the regular rectangle tool, but with a filled colour

Highlight Rectangle – Same as the regular rectangle tool, but has a translucent fill, to highlight areas of the document.
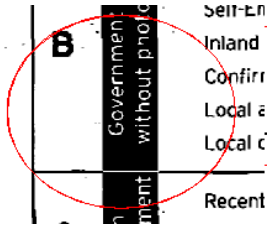
Ellipse – used to draw circles / ellipses
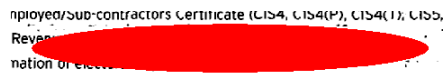
Filled Ellipse – Same as the ellipse tool, but with a coloured fill.
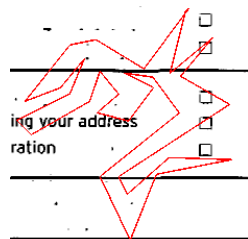
Polygon – This tool is used to draw polygons, click each time you want to make a new line, and click back on the original anchor point when you are finished to complete the polygon
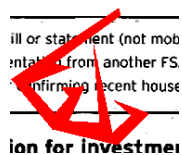
Filled Polygon – Same as the Polygon tool, but with a colour fill.

2. Additional Veri

Sticky Note – used to create a note on the document, by creating a white box with text

Text – Draw a text box and enter text, any whitespace around the text will be transparent
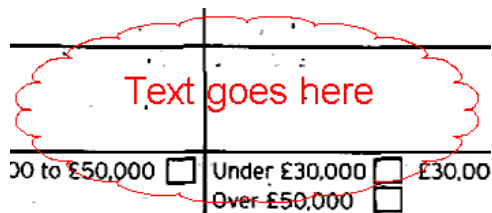
Cloud – similar to the text tool, but creates a cloud around the text.

17.7 CHANGING COLOURS

To change the colours of an annotation, firstly create the annotation, then right click on it and select Properties.
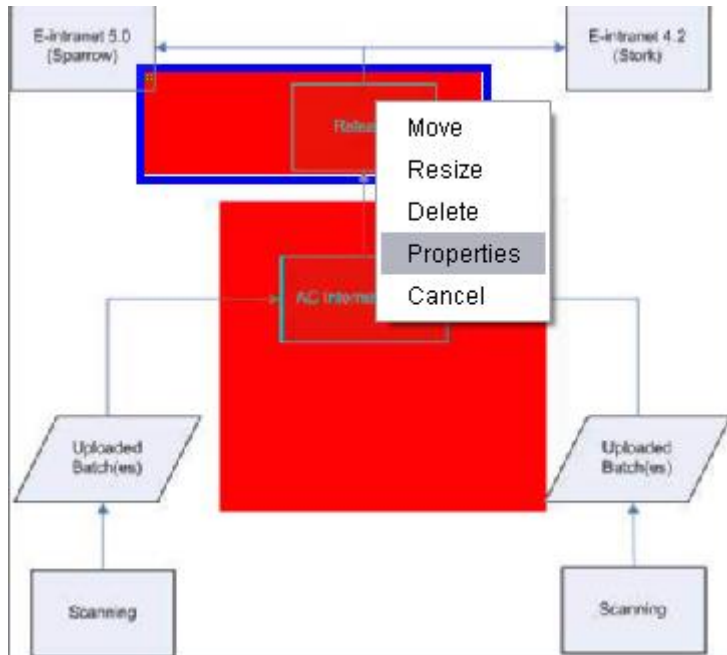
Figure 17.7.1 – Annotations in Default Colour

You will be presented with the following popup window (if this doesn't appear, it may be due to your browser not permitting popup windows).
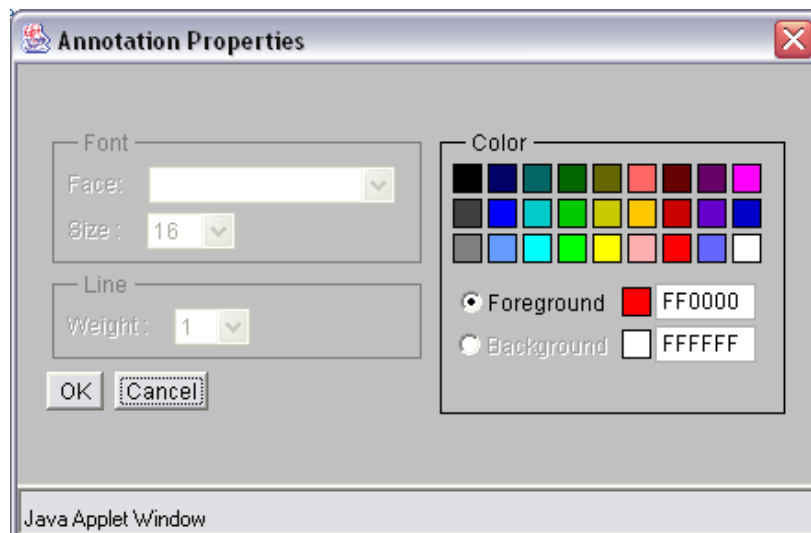
Figure 17.7.2 – Annotation Properties

Change the colours as desired, and click ok for the changes to take effect.

17.8 SAVING CHANGES

Once you have finished making your changes to the document, you can save these by selecting "Save Document" from the file menu as detailed below.
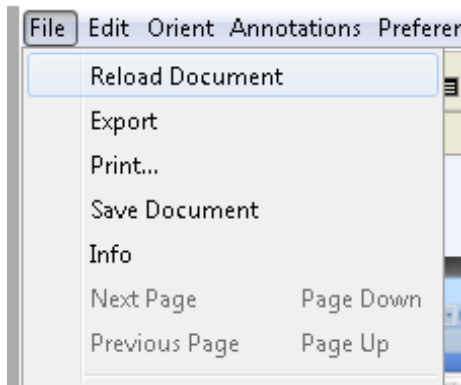
Figure 17.8.1 – Save changes

This will save the document as a new version, you will need to refresh the page by pressing F5 (Internet Explorer and Firefox). You can then view each version of the document in the Versions tab of the document details, as pictured below.
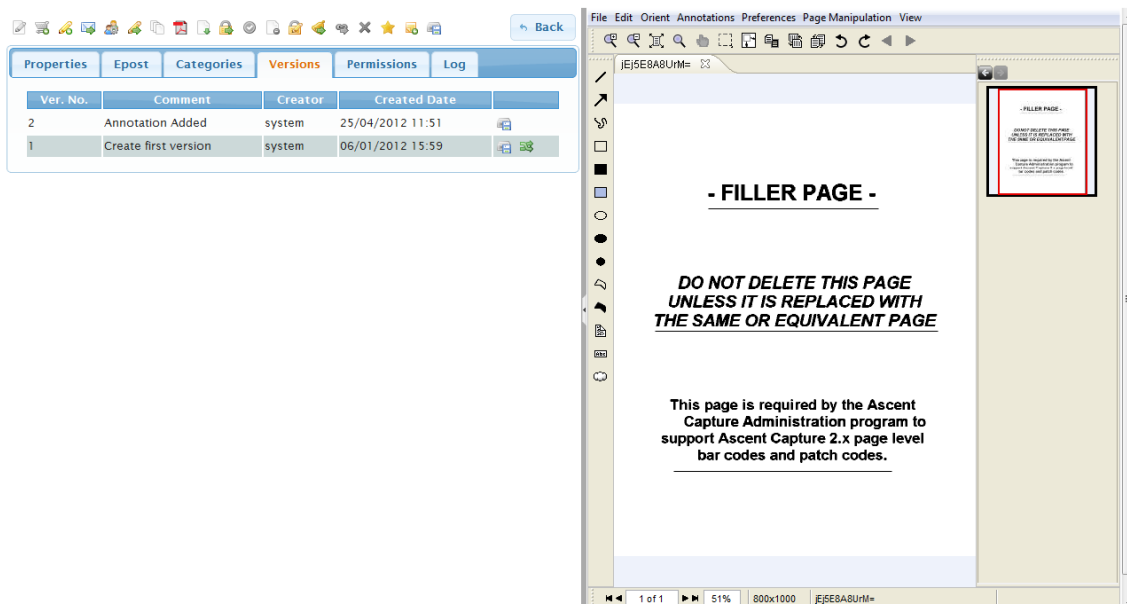
Figure 17.8.2 – Version List

EDRMS will always display the latest version of a document in the viewer, but you are able to download any previous version by clicking on the Download Icon in the versions tab, beside the version you wish to view.

18 MEASUREMENT VIEWER

18.1 OVERVIEW: MEASUREMENT VIEWER

The measurement tool bar is used for measuring drawings related to planning documents. To view the measurement toolbar you can either go to "Edit->Measurement Tool" or press CTRL-ALT-M on the keyboard.

Figure 18.1.1 – Advanced Viewer with Measurements

18.2 CALIBRATION

To measure any object you first need to calibrate the drawing.

Figure 18.2.1 – Calibration Tool

To calibrate please select the arrow shape (from the measurement toolbar) and draw a line on the drawing. Then specify the measurement for the drawn line by

specifying the length, unit and precision for the drawn line. This would be used to calculate measurements for any drawn shapes on that drawing.

Figure 18.2.2 – Taking Measurements

18.3 MEASUREMENT

Once you have calibrated a drawing then you can draw the following shapes using the icons available on the measurement toolbar:

> ➢ Rectangle

> ➢ Circle

> ➢ Polygon

> ➢ Line.

To view the measurement for the drawn shape, press CTRL on the keyboard and select the drawn shape using the mouse. The selected shape is highlighted with

green colour. The measurements for the selected shape are displayed on the toolbar. You can change the units of display or calibration at any time.

Figure 18.3.1 - Adding shapes

You can draw as many shapes on the drawing at the same time and add the measurements by selecting the shapes (using CTRL button). You can also deselect a shape by pressing CTRL and clicking on the drawing again.

To subtract the measurement of an image from the total you can press ALT on the keyboard and select that image Again you can press ALT and select multiple images to subtract their measurement from the total. Pressing Alt and selecting a shape would display it in red colour.

19 FORMS

19.1 OVERVIEW: FORMS

The forms module will provide facility to create forms on EDRMS and link them to categories. When users complete a form, it will create a document on the EDRMS using the setup template and index the documents with the information captured in the form.

The topics covered in this section are:

- Load and Submit a Form.

19.2 LOAD AND SUBMIT A FORM

There are two ways that the Forms can be loaded, these are:

1. Loading from the toolbar within the EDRMS
2. Directly Calling the Form using the URL (Form set as Public)

When creating a Form there are two options whether to have the Form available to the public via its URL (no login required) or to setup permissions as to what departments are allowed to use the Form (login required).

19.2.1 LOADING FROM TOOLBAR (Non-Public Form)

If you are using the non-public option on the Form then follow the steps below to load the Form and submit documents to the EDRMS:

Login to the EDRMS as normal and across the toolbar will be a Forms option. Highlight over this to bring up the available Forms to you.
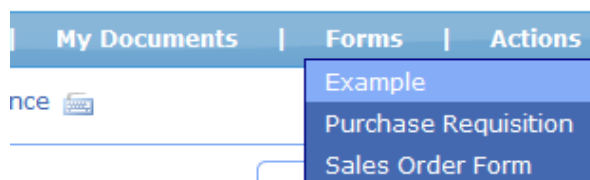
Figure 19.2.1 – EDRMS Toolbar

Here you can see that we have a "Purchase Requisition" form set up.

By clicking the Form it then displayed ready for you to enter the required information.

After entering the information simply click the "Submit" button to create the document within the EDRMS.

19.2.2 LOADING FROM URL (Public Form)

If you are using a public form then you have two options. Users can still load the form using the method above. If you would like people that do not have a login to the system to be able to submit documents into the EDRMS then they will have to do this using the URL (website address) for the Form (please contact your Technical & Site Admin Users to find these URLs for you).

Once you have the URL simply click the link or enter it into a browser and it will then load the Form without the need of a User login.

After entering the required information simply click the "Submit" button to create the document within the EDRMS.

Forms can also be configured to act as 'place holders' for physical files i.e. if a document is stored in a filing cabinet and has not been scanned into your system, then a physical records form can be populated to act as a place holder with information regarding 'meta data' about that document e.g. where it is located in the building, what the document is about i.e. a document type name, a document owner etc. These are set up by your Technical Administrator and are stored within the file plan for searching and retrieval of information. An icon also appears if a physical records form is present in the system, so to alert the user that it is a placeholder, rather than a document held in the system.