

How do I access the Document Management System?

Many CoP Administrators place a Document Management System (DMS) Widget on their CoP home page. You can also locate the DMS by selecting **My CoPs** under **My Links** off the header bar then selecting it off of the flyout for the CoP you are interested in selecting.

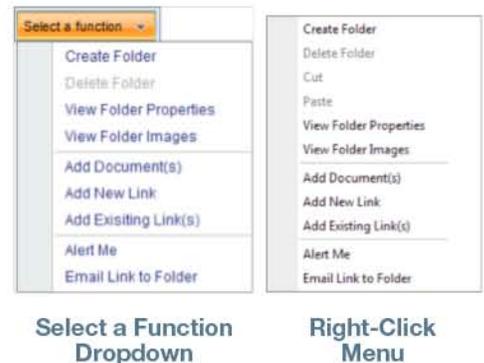
How do I use the Document Management System?

When you open the Document Management System you will be in the **Document Explorer** tab.

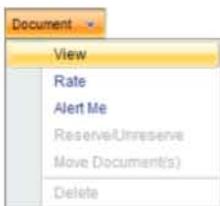
You will see the Document Management root folder in the left window pane and the contents of any selected folder in the main/right window pane.

Navigation

- Click the plus sign next to a folder in the folder tree in the left pane to expand it and view its contents.
- Use the **Select a Function** dropdown to perform folder-level functions, or
- Use the **right-click** shortcut menu. Right-click menus are available in both the folder and file sections.
- Note: If an option is grayed out, it is not available to you (some options are only available to document owners and users with Administrator rights).



View / Save Document

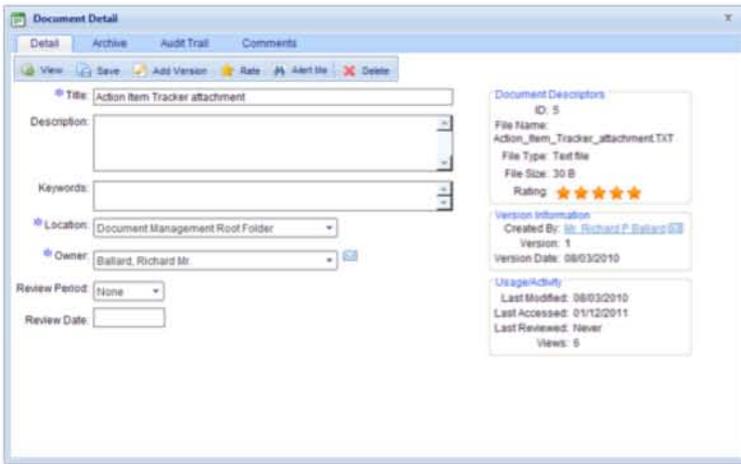


To view a document, navigate to the folder, and double click on the file name. You can also single click on the file name and select **view** in the Document dropdown.

Add a Document

While in the CoP's DMS:

- In the **Add** dropdown, click Document(s).
- In the form, click **Select Files** and navigate to the file(s) you want to upload.
- Click the name of the file, and then click **Open**. To select multiple files, simply press the Control (ctrl) key on your keyboard while clicking each file name, or use the Shift key and select the first and last file in a series.
- By default, the file name is the **Title**, but you may change it. **Title** is a required field.
- Enter a **Description** and **Keywords**, if desired.



- In the **Location**: dropdown, select the folder to which you want to upload the file.
- In the **Owner**: dropdown, select the file owner. Your name will be listed as the default.
- Set a **Review Period** and **Review Date**, if you like.
- Click **Save**.
- Note: Sections marked with a blue asterisk (*) are required.

Document Detail

Click the name of the document for which you want to view details. In the **View** dropdown, click **Detail**.

- **Detail**—shows the information entered when the file was uploaded, as well as **Document Descriptors, Version Information, and Usage/Activity**. You can also view, save or add new versions to the document from this page.
- **Archive**—lists all prior versions of the file. Knowledge Owners and file owners can also replace the current version with an older version of the file.
- **Audit Trail**—list of all activity (initial upload, downloads (views), version upload, etc. for a file).
- **Comments**—view existing or add new comments to a file using the **Comments** tab.

Add a New Version of a Document

Only Administrators and Document Owners are able to upload new versions of a document.



While in the CoP's DMS:

- In the **Add** dropdown, click **New Version**.
- Using the Document Detail form, click **Select Files** and navigate to the file you want to upload.
- Click the name of the file, and then click **Open**.
- Make any other necessary changes to the Document Detail.
- Click **Save**.

CoP Documents

This tab lists all of the documents located in the current CoP. Click the field titles to sort and filter the results to find specific documents.

My Documents

This tab lists all Documents for which you are listed as the owner throughout all of NSCKN. Use the dropdown to narrow the display to CoP-level documents.

Creating Folders in the DMS



Only Administrators are able to create new folders in the DMS.

- In the **Select a Function** dropdown, click **Create Folder**.
- Complete the Folder Details form, and click **Save**. You will be prompted to set the **Folder Security**.
- Set Groups/Role security, if necessary.

Group Name	Role
Developers	No role assigned
Office	No role assigned
Technical Support	No role assigned

How do I Delete a Folder within a CoP?

Only Administrators are able to delete folders in the DMS.

To permanently remove a folder from a community, complete the following steps:

- From your CoP's DMS, **Document Explorer** tab, select the folder you want to delete.
- In the **Select a Function** dropdown, click **Delete Folder**.
- When prompted, click **OK** to confirm deletion. If you do not wish to delete the folder, click **Cancel**.



How do I reassign a Document Owner?

Only Administrators and the current Document Owner can reassign ownership.

- In your CoP's DMS, locate the file whose owner you would like to reassign. Select the file.
- In the **View** dropdown, select **Detail**.
- On the Document Detail page, select a new owner from the **Owner** dropdown.
- Click **Save**.

Owner
Wilson, Cliff Mr.
Allen, Thomas Mr.
Ballard, Richard Mr.
Brook, Doug Mr.
Brown, Becky Mrs.
Cramer, Cathy Mrs.
Croft, Kandy Mrs.
Gottel, Louis Mr.
Hamilton, Tony Mr.
Johnson, Chad Mr.
Wilson, Cliff Mr.