

Document Manager

Features and Functionality

PROJECT FOLDER STRUCTURE

https://oaksci.training.ohio.gov/ - Unifier@https://oaksci.training.ohio.gov - Windows Internet Explorer

Skire™ Unifier™ 09/25/2009 - Shauna Hooks

Home Company Workspace Projects

User Mode

File Edit View Help

New Open Find Upload Download Delete Check Out Comments Permissions Properties

Current Phase

Documents - Current View: All

10 Item(s) Page 1 of

Ref	BP	Name	Size	Upload Date	Owner	Title	Rev.Nc
		0000 Concept Development			Fred Holcomb		
		0100 Acquisition			Fred Holcomb		
		0200 Design			Fred Holcomb		
		0300 Construction			Fred Holcomb		
		0400 Post Construction			Fred Holcomb		
		0500 Extra Services			Fred Holcomb		
		0600 Budget			Fred Holcomb		
		project			Fred Holcomb		
		0600 Budget			Fred Holcomb		
		project			Consultant Stude		
		Quilt Project.pub	66 KB	01/06/2009	Oaks Student 6		
		testnumbers.xls	14 KB	07/07/2009	Shauna Hooks		

Document Manager

Documents

0000 Concept Development

0100 Acquisition

0200 Design

0300 Construction

0400 Post Construction

0500 Extra Services

0600 Budget

project

Recycle Bin

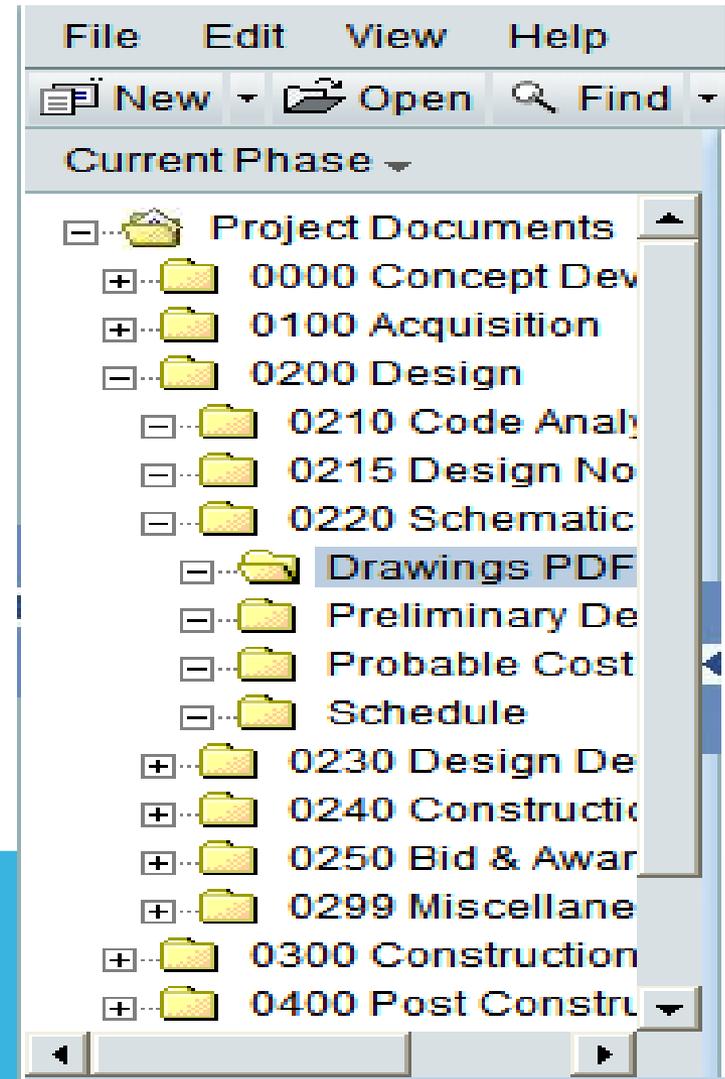
Folders

Documents and folders within folders

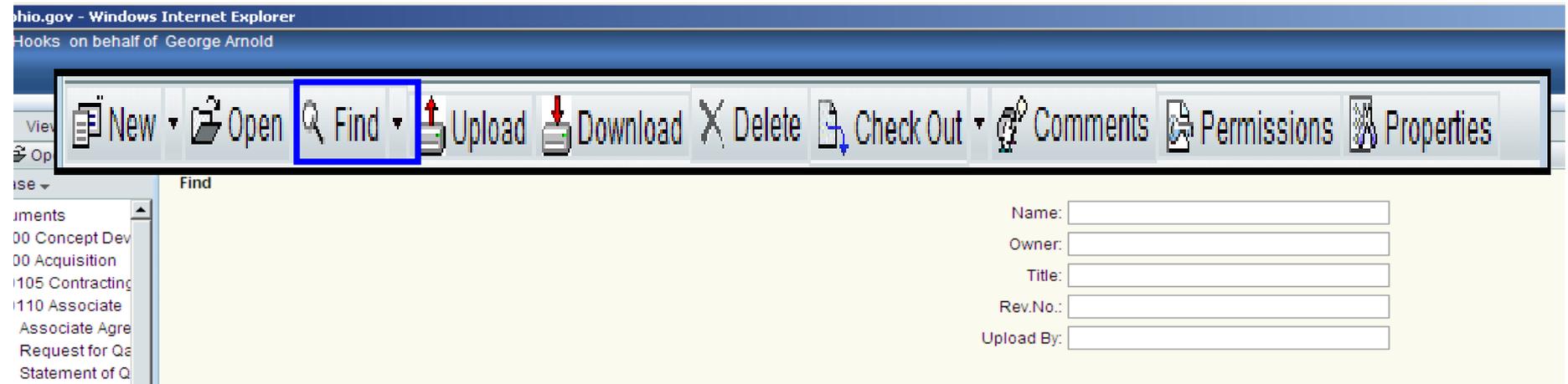
DM FOLDER STRUCTURE

Folder structure has been defined by OAKS CI and can be extended

Access to the DM is permission based



FIND DOCUMENTS



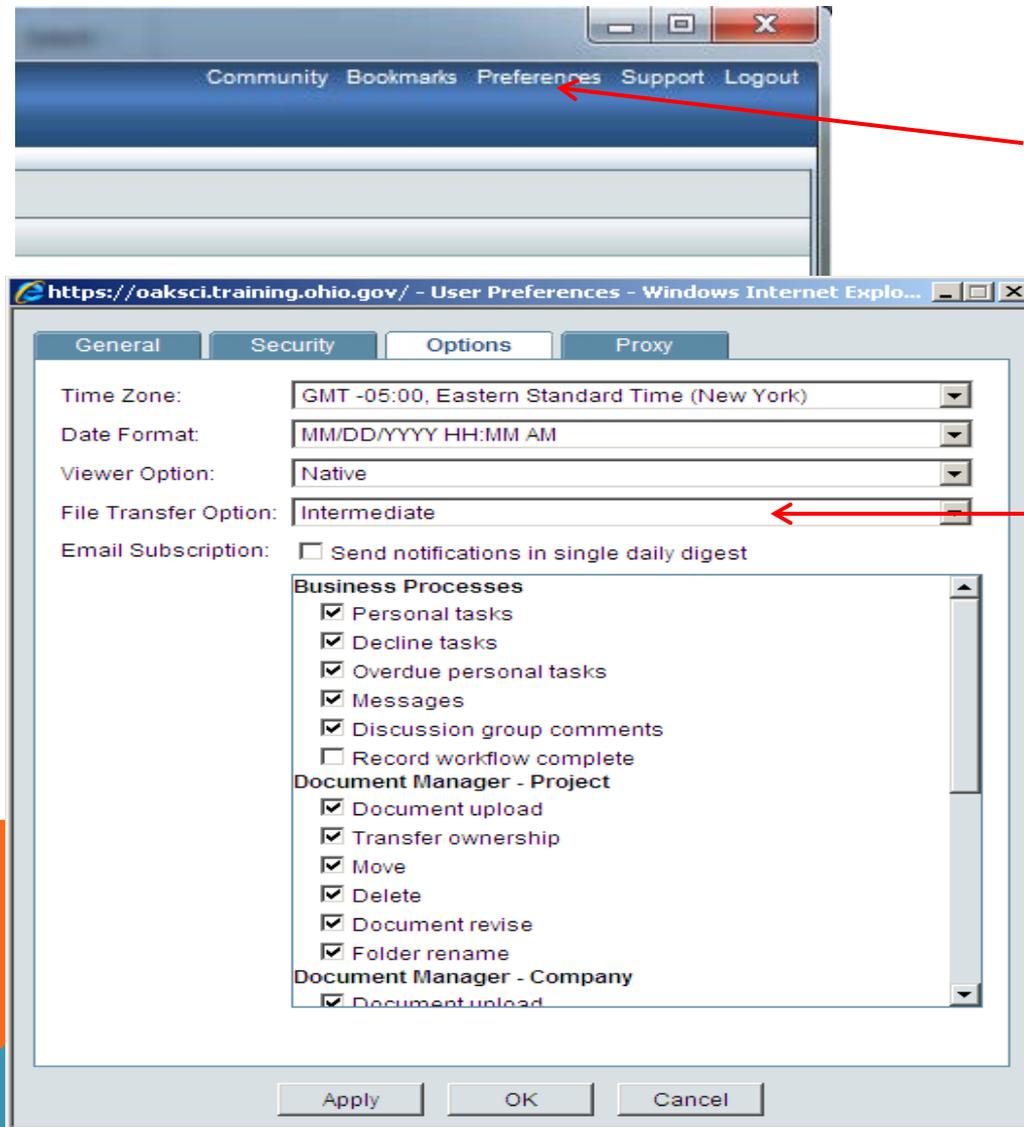
Supports searches for data within data and keyword search within documents

**Supports search based on file content
Search includes earlier versions**

DOCUMENT MANAGEMENT

Document Upload

FILE TRANSFER PREFERENCES



- Prior to uploading insure your Preferences are correct
- Intermediate file transfer option

UPLOAD

Click Upload

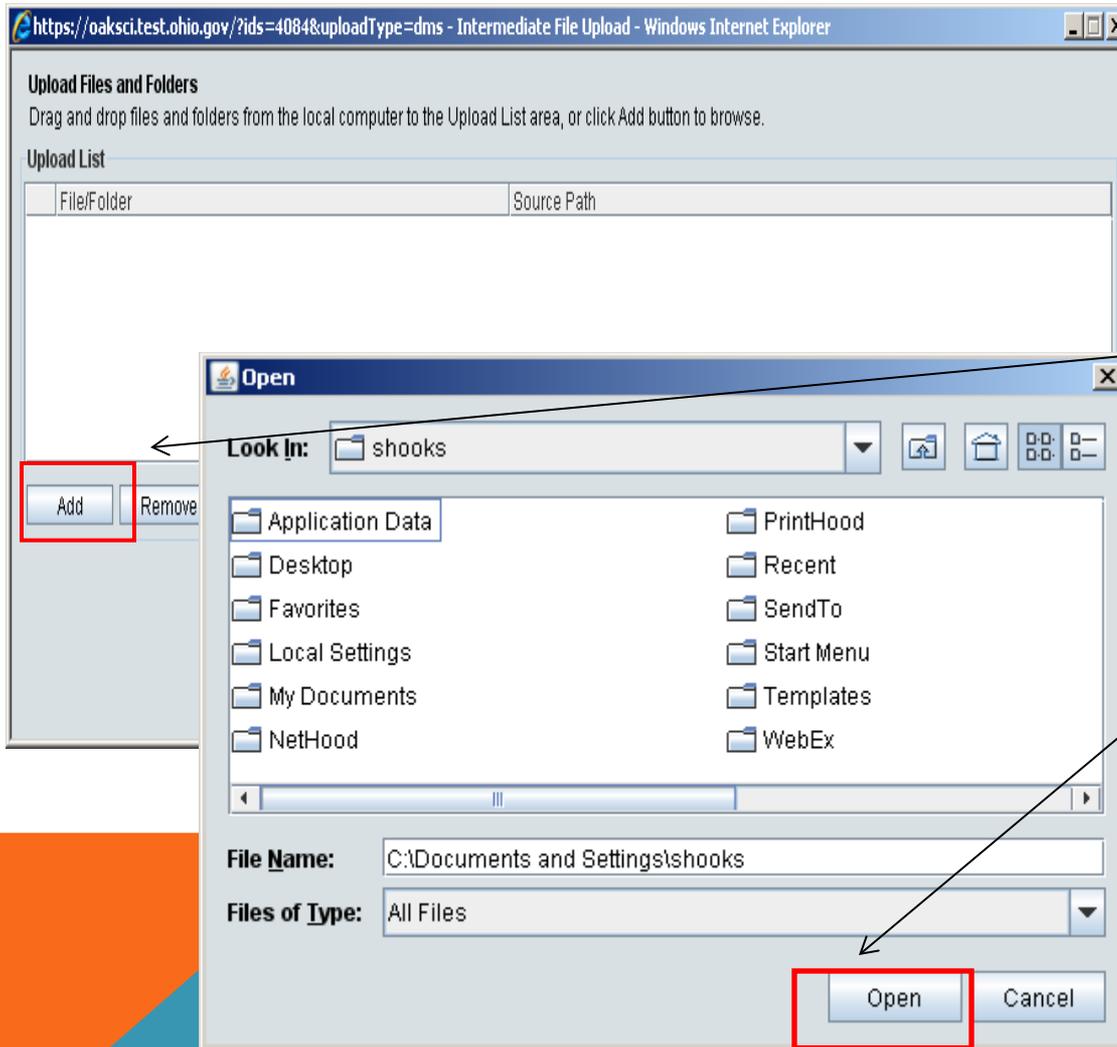
Choose folder

The screenshot shows a web-based file management interface. The browser address bar displays the URL `https://oaksci.training.ohio.gov/` and the user is identified as `Unifier@https://oaksci.training.ohio.gov`. The page title is `12/09/2009 - Shauna Hooks`. The interface includes a navigation pane on the left with a tree view of folders, a main content area with a menu bar (File, Edit, View, Help) and a toolbar (New, Open, Find, Upload, Download, Delete, Check Out, Comments, Permissions, Properties), and a file list table.

The file list table contains the following data:

	Ref	BP	Name	Size	Upload Date	Owner	Title
			A-1CONFORMED.pdf	397 KB	03/13/2008	Oaks Student 1	
			A1-1.pdf	561 KB	03/13/2008	Oaks Student 1	
			A2-1.pdf	708 KB	03/13/2008	Oaks Student 1	
			A2-2.pdf	1017 KB	03/13/2008	Oaks Student 1	
			A3-1.pdf	443 KB	03/13/2008	Oaks Student 1	
			A4-1.pdf	539 KB	03/13/2008	Oaks Student 1	
			A5-1.pdf	327 KB	03/13/2008	Oaks Student 1	
			A5-2.pdf	448 KB	03/13/2008	Oaks Student 1	
			A7-1.pdf	415 KB	03/13/2008	Oaks Student 1	
			A8-1.pdf	622 KB	03/13/2008	Oaks Student 1	
			A9-1.pdf	377 KB	03/13/2008	Oaks Student 1	

UPLOAD



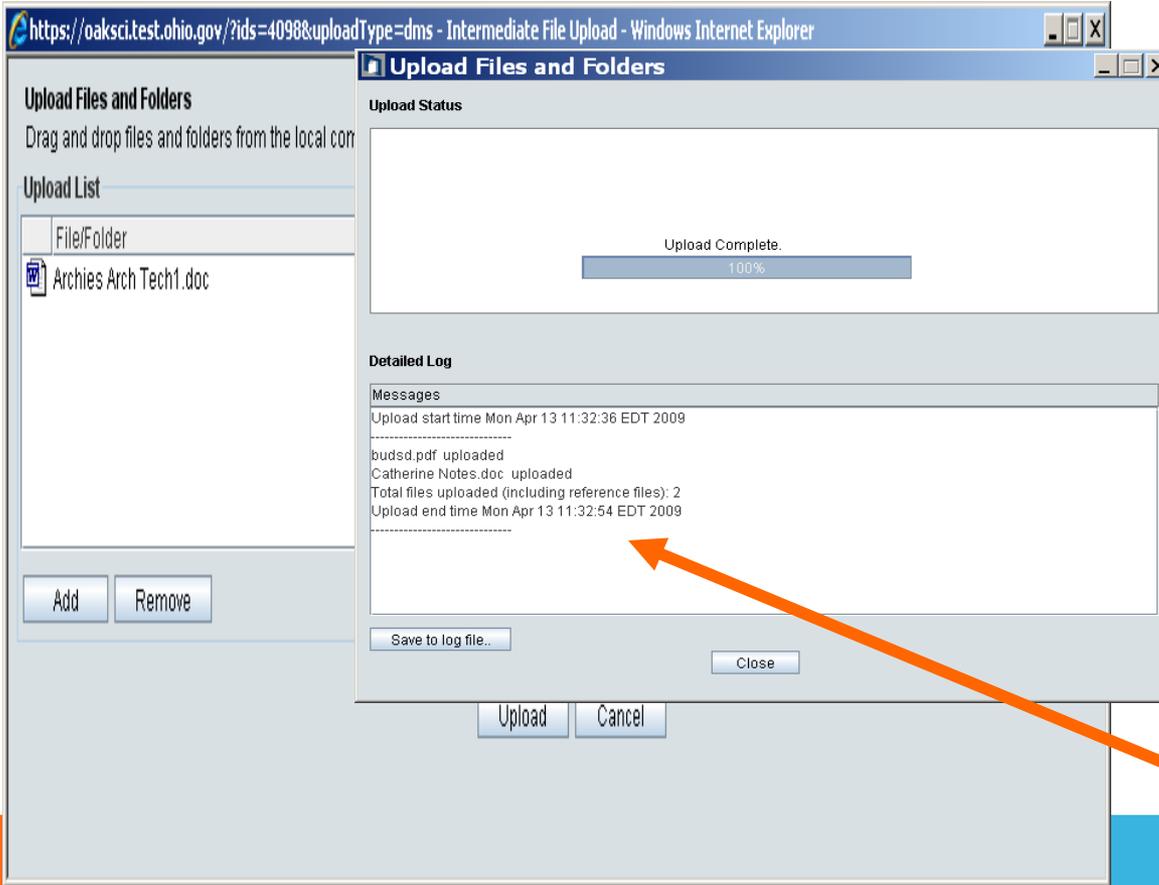
**Upload Files and
Folders Window
Opens**

Click Add

**Choose file or folder
to upload**

Click Open

UPLOAD



File or folder is populated into Upload list

Click Upload

Box will pop up indicating the upload is Complete

What if it doesn't work?

If you attempt upload and you receive an error message, you may not have completed your first time user set up this includes reviewing the level of Java you are currently running.

A quick fix is to click on Preferences, Options and change your File Transfer Option from Intermediate to Basic, log out of OAKS CI log back in and reattempt the upload (see page 11)

Internet Explorer browser window showing a document management system interface. The browser address bar displays "http://oaksci.osfcohoio.gov". The user is logged in as Shauna Hooks. The page title is "Company Workspace | School Facilities".

The main content area shows a document list under the heading "Required Documents - Current View: All". The list contains two items:

Ref	BP	Name
C110-03-4		Contract.p
		Contract.p

The "User Preferences - Windows Internet Explorer" dialog box is open, showing the "Options" tab. The "File Transfer Option" is set to "Basic". Other settings include:

- Time Zone: GMT -05:00, Eastern Standard Time (New York)
- Date Format: MM/DD/YYYY HH:MM AM
- Default Viewer: Native
- Viewer Exceptions: Use semi-colons to separate extensions. Always Use Native: [] Always Use Unifier: []
- Default Login View: Use Custom Dashboard as default login view
- Email Subscription: Send notifications in single daily digest

The "Workflow Business Processes" section includes:

- Personal tasks
- Decline tasks
- Overdue personal tasks
- Messages
- Discussion group comments
- Record workflow complete
- Record Modification

The "Non Workflow Business Processes" section includes:

- Record Creation
- Record Modification

The "Document Manager - Project/Shell" section includes:

- Document upload
- Transfer ownership
- Move

Buttons at the bottom of the dialog are "Apply", "OK", and "Cancel".