



# Document Manager

## System Upgrade, August 2019

# Document Manager Update

- ▶ You will no longer have the option to **switch** to Classic View, you will now view Document Manager in the Standard View

The screenshot displays the Document Manager interface. The left sidebar contains a navigation menu with items like Alerts, Tasks, Notifications, Drafts, uMail, Information, Cost Manager, Data Manager, Document Manager, Documents, Unpublished Docu..., Logs, and Reports. The main content area shows the 'Documents' section with a breadcrumb trail: Agency > OAKS CI Training > OAKS CI Training 4. A red arrow points to a button labeled 'Switch to Classic View' in the top right corner of the main content area. Below the breadcrumb, there are controls for 'Create', 'Actions', download, upload, 'View' (set to 'All'), refresh, and filter. A table lists documents with columns for Name, Ref, BP, Size, Upload Date, Owner, and Title. The table shows a folder named 'Documents' and several sub-folders like '0000 Concept Deve...', '0100 Acquisition', etc., all owned by 'Shauna Hooks'. At the bottom, it indicates 'Total: 220'.

Name	Ref	BP	Size	Upload Date	Owner	Title
[-] Documents					Shauna Hooks	
[+] 0000 Concept Deve...					Shauna Hooks	
[+] 0100 Acquisition					Shauna Hooks	
[+] 0200 Design					Shauna Hooks	
[+] 0300 Construction					Shauna Hooks	
[+] 0400 Post Construc...					Shauna Hooks	
[+] 0500 Extra Services					Shauna Hooks	
[+] 0600 Budget					Shauna Hooks	

# Using Standard View

- ▶ When navigating in Standard View, notice that the middle folder pane no longer exists
- ▶ To navigate to a folder, simply click the plus sign to expand the folder tree and locate the folder you wish to access

The screenshot displays a software interface with a sidebar on the left containing navigation options: School Facilities, Alerts, Tasks, Notifications, Drafts, uMail, Information, Cost Manager, Data Manager, Document Manager, Documents (highlighted), Unpublished Documents, Logs, and Reports. The main content area shows a breadcrumb path: Agency > OAKS CI Training > OAKS CI Training 4. Below this is a 'Documents' section with a 'Switch to Classic View' link. A folder tree is visible with a plus sign next to 'Documents' highlighted by a red box and arrow. A zoomed-in view of the document list is shown below, featuring a table with columns: Name, Ref, BP, Size, Upload Date, Owner, Title, Rev.No., Issue Date, and Pub.N.

Name	Ref	BP	Size	Upload Date	Owner	Title	Rev.No.	Issue Date	Pub.N
Documents					Shauna Hooks				0
0000 Concept Deve...					Shauna Hooks				0
0010 Owner Visi...					Shauna Hooks				0
Chrysanthemum...			859 KB	02/02/2017 10...	Student 1				1
Picture1.jpg			8 KB	05/04/2017 06...	Katie Tuttle				1
0060 Funding					Shauna Hooks				0
0020 Project Definit...					Shauna Hooks				0
0030 Planning					Shauna Hooks				0
0040 Feasibility					Shauna Hooks				0
0050 Budgeting					Shauna Hooks				0
0070 Local Adminis...					Shauna Hooks				0
Picture1.jpg			8 KB	05/04/2017 06...	Katie Tuttle				1
0100 Acquisition					Shauna Hooks				0
0200 Design					Shauna Hooks				0
0300 Construction					Shauna Hooks				0

# Using Standard View

- ▶ You can also navigate to folders using the documents file path at the top of your Documents screen
- ▶ Simply click the arrow next to documents, and continue selecting until you locate the appropriate folder

The screenshot displays a web application interface for document management. The main area shows a list of documents under the heading "Documents". A red box highlights the "Documents" breadcrumb and the "0200 Design" folder in the list. A red arrow points from the "0200 Design" folder to a larger, detailed view of the "Documents" interface. This detailed view shows the breadcrumb path "Documents > 0200 Design > 0240 Construction Documents > Schedule" highlighted in a red box. Below the breadcrumb, there are controls for "Create", "Actions", "View", and a table with columns: Name, Ref, BP, Size, Upload Date, Owner, and Title. The table contains one entry: "Schedule" with owner "Shauna Hooks". At the bottom, it says "Total: 222".

Agency: OAKS CI Trainin... +

Agency > OAKS CI Training > OAKS CI Training 4

Documents [Switch to Classic View](#)

Documents >

Create 0000 Concept Development All

Name	BP	Size	Upload Date	Owner	Title	Rev.No.	Issue Date	Pub.No.
0100 Acquisition								
0200 Design				Shauna Hooks				0
0300 Construction								
0400 Post Construction								
0500 Extra Services								
0600 Budget								
0600 Budget								

Documents [Switch to Classic View](#)

Documents > 0200 Design > 0240 Construction Documents > Schedule

Create Actions View All

Name	Ref	BP	Size	Upload Date	Owner	Title
Schedule					Shauna Hooks	

Total: 222

[https://ohio-dev-unifier.oracleindustry.com/bp/mod/dm/doc/home?\\_uref=uuu748:navigator-3#](https://ohio-dev-unifier.oracleindustry.com/bp/mod/dm/doc/home?_uref=uuu748:navigator-3#)

# Using Standard View

- ▶ When you click on a document, you can view more information about that document in a preview window on the right hand side.
- ▶ Here, you can view which record numbers this document is linked to

The screenshot displays a document management system interface. On the left is a navigation sidebar with options like 'OAKS CI Training 4 - Home', 'Alerts', 'Tasks', 'Notifications', 'Drafts', 'uMail', 'Information', 'Cost Manager', 'Data Manager', 'Document Manager', 'Documents', 'Unpublished Documents', 'Logs', and 'Reports'. The main area shows a 'Documents' view for 'OAKS CI Training 4'. A table lists documents with columns for Name, Ref, BP, and Size. The document 'Chrysanthemu...' is selected. On the right, a preview window titled 'Linked ...' shows a table of linked record numbers: AI-00121, PWR-0080, MM-0036, and MM-0037. A red arrow points from the selected document in the table to the 'Linked ...' window.

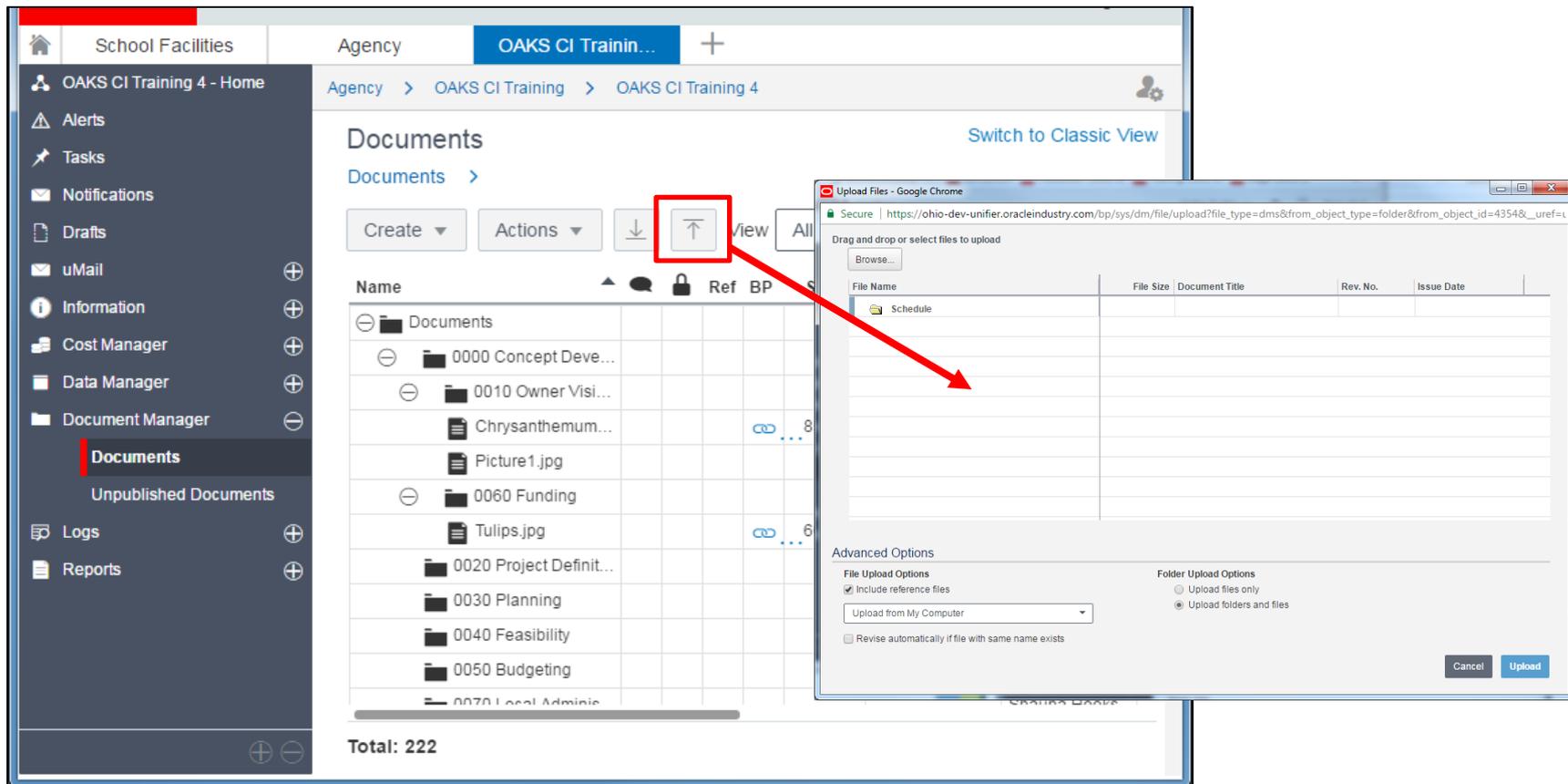
Name	Ref	BP	Size
Documents			
0000 Concept Deve...			
0010 Owner Visi...			
Chrysanthemu...			859 KB
Picture1.jpg			8 KB
0060 Funding			
Tulips.jpg			607 KB
0020 Project Definit...			
0030 Planning			
0040 Feasibility			

Record Number
AI-00121
PWR-0080
MM-0036
MM-0037

# Document Manager

- ▶ To upload a document to Document Manager, click the **Upload Arrow button** 

- ▶ Your normal upload window will open and you will continue the normal upload process



The screenshot displays the Document Manager interface for 'OAKS CI Training 4'. The 'Documents' section is active, showing a list of folders and files. The 'Upload Arrow' button is highlighted with a red box. A red arrow points from this button to the 'Upload Files' dialog box, which is open in a browser window. The dialog box shows a table with columns for File Name, File Size, Document Title, Rev. No., and Issue Date. The 'Advanced Options' section is visible, with 'Include reference files' checked and 'Upload from My Computer' selected.

File Name	File Size	Document Title	Rev. No.	Issue Date
Schedule				

Advanced Options

File Upload Options

- Include reference files
- Upload from My Computer
- Revise automatically if file with same name exists

Folder Upload Options

- Upload files only
- Upload folders and files

Cancel Upload

# Questions?

Please contact OAKS CI Support Desk:

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