

Website Document Management System

Purpose:

On Imperial Valley College's previous website, everybody who had access to create/edit pages in the website also had the ability to upload files into their own user-specific folders. The problem with this is that it led to duplication of files, and was also disorganized so there was no way to display all of our files centrally or hide files from the public (internal only documents).

The purpose for the document management system for the website is to allow:

1. The college to **centrally store** and **display** the college's important documents
2. Allow us to **assign upload/viewing rights** to certain folders according to college-defined groupings
3. **Standardize** and improve the **file naming** schemes used by the various groups on campus for their documents

Step 1: Logging into the New College's Website



1. First go to <http://www.imperial.edu>
 - a. Alternately, you may go directly to the Documents Page
<https://www.imperial.edu/faculty-and-staff/documents/>
2. Click on the Login button on the far right of the menu bar
3. A Login Form should appear that looks like this:

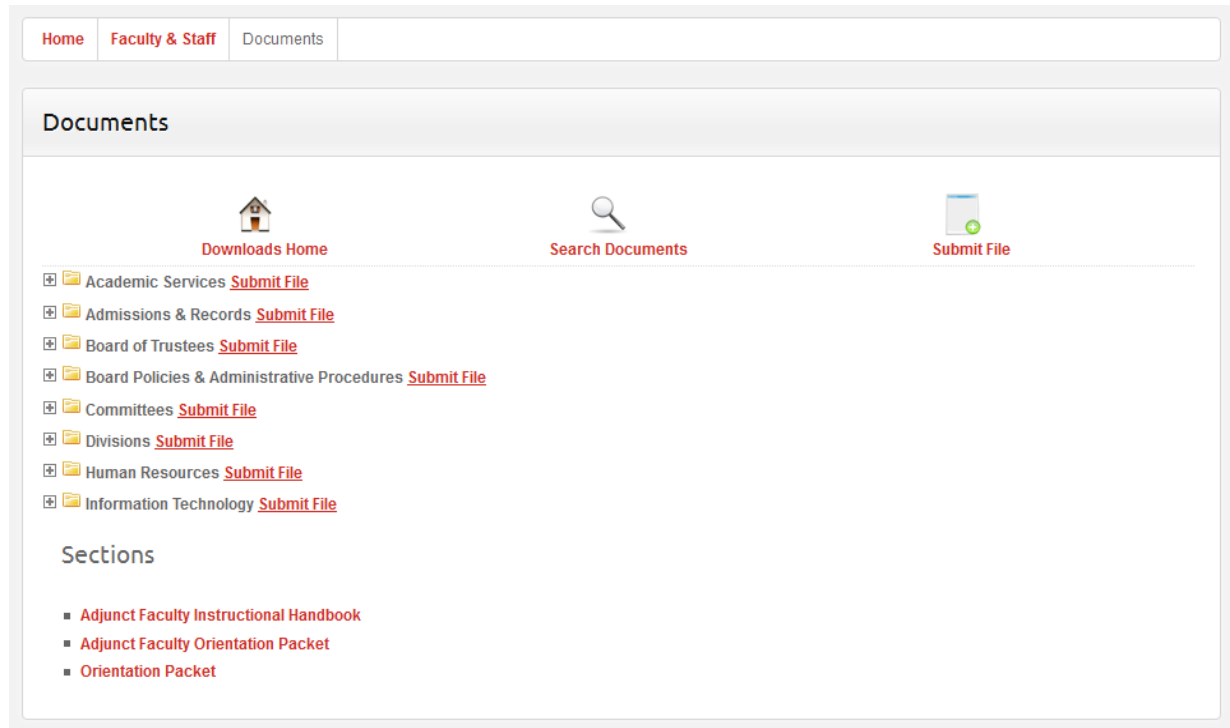
A screenshot of the Staff Login Form. At the top left is a close button (an 'x' in a circle). Below it is the title "Staff Login Form". A paragraph of instructions reads: "Please use the first part of your IVC Email (e.g. joe.smith) and your Email Password to login. If you are a student, please use the Student Portal to login." Below the text are two input fields: "User Name" and "Password". Under the "User Name" field is a "Remember Me" checkbox. To the right of the "Password" field is a "Log in" button.

4. For the **username** use either the first part of your email address (the part before the @ symbol) or the full email address (either should work)
5. For the **password** use your email password
6. Click the **Login** button.
7. After logging in, if you aren't already on the Documents page please go to it:
<https://www.imperial.edu/faculty-and-staff/documents/>

Step 2: Selecting the Folder to Submit Files into

Note: In the program, you may also see the word Category used...simply do a mental translation in your head to Folder, as they are one and the same.



































Below you can see the top level folders where files can be stored and since we're now logged in you can see the Submit File button next to each Folder:



If we wanted to **Submit a File** into the **Information Technology | Support & Training | Support** folder we would simply drill down till we could see the Support folder, and then we'd click on the Submit File link to the right of it:

- ⊕ Academic Services [Submit File](#)
- ⊕ Admissions & Records [Submit File](#)
- ⊕ Board of Trustees [Submit File](#)
- ⊕ Board Policies & Administrative Procedures [Submit File](#)
- ⊕ Committees [Submit File](#)
- ⊕ Divisions [Submit File](#)
- ⊕ Human Resources [Submit File](#)
- ⊕ Information Technology [Submit File](#)
 - ⊖ Support & Training [Submit File](#)
 - Support [Submit File](#)
 - ⊕ Training (16) [Submit File](#)

If we wanted to submit an **agenda** file for the **current year** for the **Technology Planning Committee** we could drill down into the Committees till we got to the **Technology Planning | 2011 | Agendas** folder and then click on **Submit File**:

- [-]  Committees [Submit File](#)
 - [+]  Academic Senate [Submit File](#)
 - [+]  Advisory and Mandated Committees [Submit File](#)
 - [+]  College Council [Submit File](#)
 - [-]  Planning Committees [Submit File](#)
 - [+]  Educational Master and Program Review Planning [Submit File](#)
 - [+]  Strategic Planning [Submit File](#)
 - [-]  Subcommittees [Submit File](#)
 - [+]  Budget and Fiscal Planning [Submit File](#)
 - [+]  Facilities and Environmental Improvement [Submit File](#)
 - [+]  Marketing [Submit File](#)
 - [+]  Professional Development [Submit File](#)
 - [+]  Staffing [Submit File](#)
 - [+]  Student Learning Outcomes [Submit File](#)
 - [-]  Technology Planning [Submit File](#)
 - [+]  2000 [Submit File](#)
 - [+]  2001 [Submit File](#)
 - [+]  2002 [Submit File](#)
 - [+]  2003 [Submit File](#)
 - [+]  2004 [Submit File](#)
 - [+]  2005 [Submit File](#)
 - [+]  2006 [Submit File](#)
 - [+]  2007 [Submit File](#)
 - [+]  2008 [Submit File](#)
 - [+]  2009 [Submit File](#)
 - [+]  2010 [Submit File](#)
 - [-]  2011 [Submit File](#)
 -  Agendas [Submit File](#)
 -  Minutes [Submit File](#)
 - [+]  2012 [Submit File](#)
 - [+]  Standing Rules (10) [Submit File](#)
 - [+]  Divisions [Submit File](#)
 - [+]  Human Resources [Submit File](#)
 - [+]  Information Technology [Submit File](#)

Step 3: Submitting Files

Submit a Document: Step 1

After clicking on a Submit File link, you will be taken to the Submit a Document page:

Submit a Document

Step 1 of 3

Choose the upload method

Upload a file from your computer
 Transfer a file from another server to this server
 Link a file from another server to this server

Next >>>

We will almost always be **Uploading a File from your computer**, so all you need to do on this page is click **Next**, since that option is selected by default.

Important!

Please read the separate document about file naming conventions before uploading your document in the next step.

Additionally, please make sure your file has been converted to **PDF** format.

Submit a Document: Step 2

The next step will allow you to browse your computer to find the file you want to upload:

Submit a Document

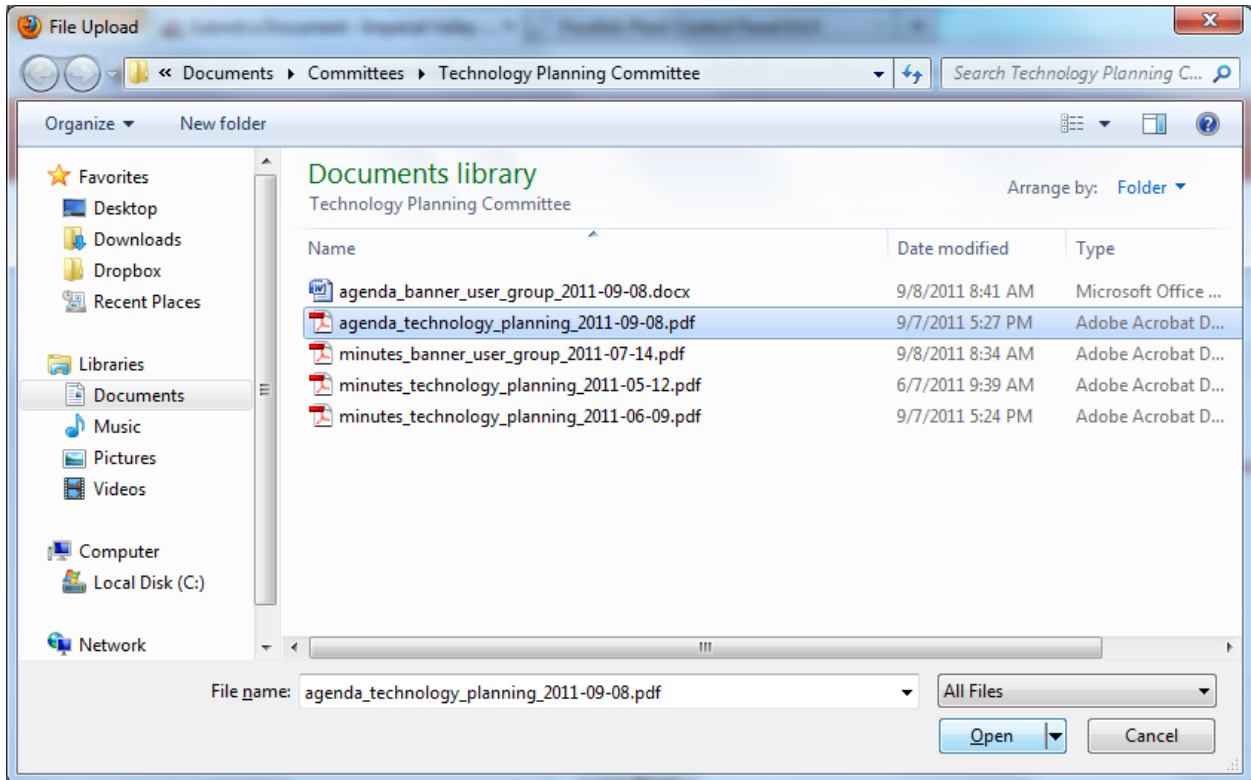
Step 2 of 3

Upload a file from your computer

Select a file Browse...

<<< Back Upload >>>

So I'll go ahead and click on Browse and then go into the Technology Planning Committee folder I have on my computer and select the Agenda file I want to upload:



Once I have selected the file I want to upload (and clicked on the Open button in the image above) I can go ahead and click on the Upload button back on the Submit a Document page:

Submit a Document

Step 2 of 3

Upload a file from your computer

Select a file C:\Users\omar.amos.IV Browse... Upload <<< Back

As the file is uploading you'll see a progress bar animation, before you're redirected to the next page:

Submit a Document

Step 2 of 3

Upload a file from your computer

Progress bar: [|||||] Please wait while DOCman is uploading
Select a file C:\Users\omar.amos.IV Browse... Upload <<< Back

Submit a Document Step 3:

On the next page you'll be able to customize the title for your file (this will be displayed on the website), as well as customize the Category (Folder) that your file will be stored in.

Note: Please verify that the category is the one you selected.

Make sure to do the following:

1. Set Approved to Yes
2. Set Published to Yes

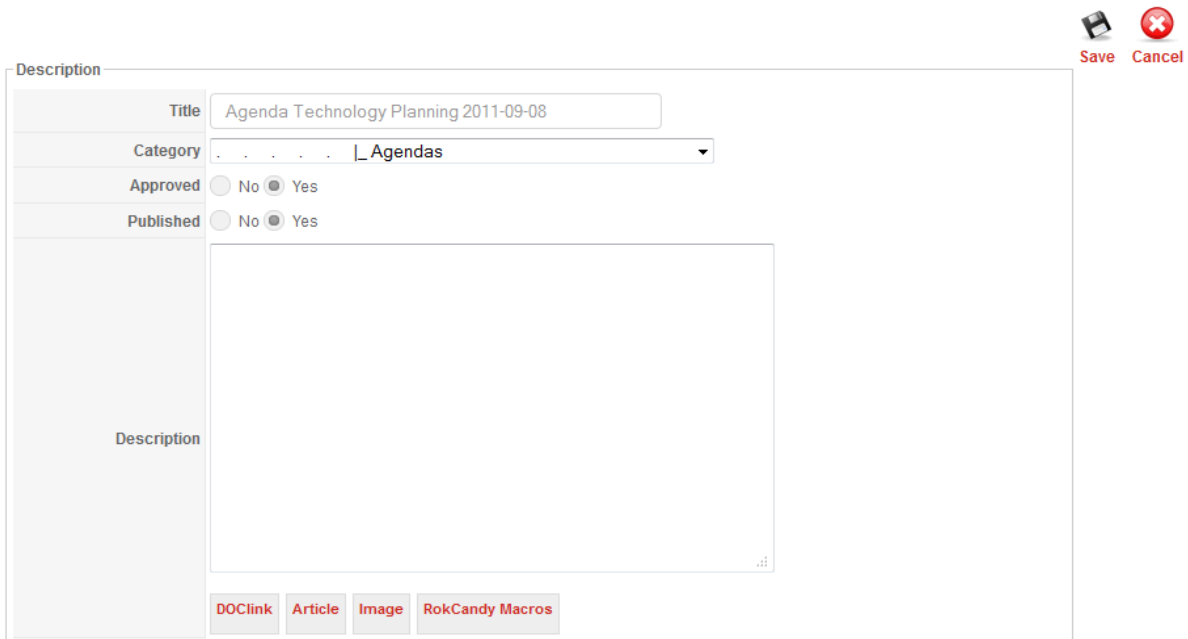
If you don't do the above you can go back later and do it, but the main point is that the file will not be displayed to others until it has been Approved and Published.

Optional Step:

1. Add a description (not required, and needs considerable time on your part to be entered for each document)

Once you've performed the Steps above, click on the **Save** button in the top right section.

Edit the Document



The screenshot shows a web form titled "Description" for editing a document. The form includes the following fields and controls:

- Title:** A text input field containing "Agenda Technology Planning 2011-09-08".
- Category:** A dropdown menu with "Agendas" selected.
- Approved:** Radio buttons for "No" and "Yes", with "Yes" selected.
- Published:** Radio buttons for "No" and "Yes", with "Yes" selected.
- Description:** A large, empty text area for entering a description.
- Bottom Buttons:** Four buttons labeled "DOCLink", "Article", "Image", and "RokCandy Macros".
- Top Right Buttons:** "Save" and "Cancel" buttons.

After you've clicked on Save, you should be taken to a page that looks like this:

Thank you for your submission.


Home Documents Committees Planning Committees Subcommittees Technology Planning 2011 Agendas

Downloads Home Search Document Submit File

Agendas

Documents

Order by : Name | Date | Hits [Ascendant]

 **Agenda Technology Planning 2011-09-08**

new!	
Date added:	09/15/2011
Date modified:	09/15/2011
Filesize:	102.28 kB
Downloads:	0

Download View Details Edit Move Delete Update Reset Checkout Unpublish

At this point you have the option to perform a number of operations on the file:

- **Edit** – Allows you to Edit the Title, Change the Category, Add a Description, Change the Viewers and Maintainers Groups for the file.
- **Move** – Allows you to move the file to a different Category
- **Delete** – Allows you to delete the file
- **Update** – Allows you to upload a new file to replace the existing file
- **Reset** – Should reset the Downloads count for the file
- **Checkout/Checkin** – Allows you to checkout the file for editing or check it back in (mostly handled automatically)
- **Publish/Unpublish** – Allows you to make the file viewable to others or hidden

Advanced (Optional) Step – Changing the Viewer/Maintainer Groups for a file:

When **editing** a document **beneath the description area** are a number of tabs: Document, **Permissions**, License, and Details. To change the Viewer/Maintainer Groups for a File you'll need to click on the **Permissions** tab:

Document	Permissions	License	Details
Viewers	Everybody ▼		
Maintainer	Faculty/Staff Group ▼		
Created by	[Omar Ramos] on Thursday, 15 September 2011		
Last updated by	[Omar Ramos] on Thursday, 15 September 2011		

Here you can change the **Viewers** from Everybody (the default) to a more specific group (to create a new group or assign people to a group, please create a Service Desk ticket in the **Technology Requests | Website Support | Document Management System Support** request type).

You can also do the same with the **Maintainer** (by default, this is the **Faculty/Staff Group**).